The Dutch Shopping Place 2 Be
Clever city branding or just good luck?

Thesis | S.C.M. Aarts | Delft University of Technology | Master Real Estate & Housing
The Dutch Shopping Place 2 be
Clever city branding or just good luck?

Master Thesis

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‘Shopping is arguably the last remaining form of public activity. Through a battery of increasing predatory forms, shopping has infiltrated, colonized, and even replaced, almost every aspect of urban life... the voracity by which shopping pursues the public has, in effect, made it one of the principal –if only- modes by which we experience the city.’

By Rem Koolhaas (Chung et. al., 2002)
Management summary

Cities have to deal with high competitive pressure nowadays. In the competition for high-quality companies, high-educated residents and visitors with money to spend, an increasing number of cities and regions are actively involved in strengthening their position. Today, shopping is seen as one of people’s major leisure activities, so the promotion of the shopping opportunities an inner-city has to offer seems to be a useful way to put this city on the map. The use of retail in order to influence the image of a city is called ‘retail focused city branding’ in this thesis. The problem statement is:

**Objective:**
Outlining the role of retail in the positioning of Dutch inner-cities, to gain insight in the opportunities to brand a city as a shopping destination.

**Main research question:**
Is retail focused city branding a useful technique to position Dutch cities as shopping destinations?

Confronting the outcomes of the conducted theory review and case studies resulted in several conclusions. From this conclusions is derived that retail focused city branding can be a useful technique to position Dutch cities as shopping destinations indeed. It turns out to be hard to determine its effectiveness, but city branding is not just a matter of achieving commercial success. It is a line of thought to create a vision, to align and to commit stakeholders and to provide them the opportunity to be proud of their inner-city. Several do’s and don’t are determined in order to apply this technique successfully:

**Do’s:**
- Having deep understanding of retail focused city branding’s line of thought;
- Applying one unambiguous branding strategy;
- Making sure the applied branding strategy fits the inner-city to be branded: be credible;
- Using a centralised organisation in order to position the inner-city;
- Matching the organisation structure to the city to be branded;
- Trying to enhance commitment of the stakeholders;
- Monitoring the achieved results in order to keep the stakeholders focused;
- Having a long-term vision in order to create a durable city brand;

**Don’ts:**
- Applying differentiated city branding activities, since this does not result in an unambiguous city brand;
- Having different parties involved in the positioning separately;
- Giving private parties the responsibility of the city branding: make sure the municipality is involved as an interdependent facilitator;
- Switching from one retail focused city branding strategy to another;
- Applying a city brand that excludes specific focus groups.
Preface

In order to complete the Master Real Estate & Housing at Delft University of Technology a graduation research has to be conducted. This thesis is the result of my graduation research concerning the positioning of Dutch inner-cities as ‘shopping places to be’. I took the challenge to determine the effectiveness of city branding strategies using inner-city retail in order to become well known shopping destinations. The research was conducted at my Faculty’s graduation group Retail & Leisure, in cooperation with the engineering and consulting firm DHV in Amersfoort.

Before I started writing my thesis I was warned by already graduated friends and housemates that it was going to be the toughest period of my years as a student, and I have to admit they were definitely right. Although it is also worth mentioning that it was the most educational period. Alongside knowledge of the retail property and city branding field I also learned a lot about myself. Working on a graduation research implies that you are thrown on your own resources and I experienced that to be rather difficult. This thesis is not quite the product I expected to deliver when I started my research a year ago, but now that it is finished I am pretty proud of the result.

During my graduation research I was supported by many people and I would like to use this preface to show them my gratitude. Acknowledgement goes to my first mentor from University D. Kooijman, who guided my graduation process critically. Next I thank L. Lousberg for being an optimistic second mentor. Third I like to thank DHV for facilitating my research. Special acknowledgement goes to my Tessa Bruigom, my graduation mentor at the company. The people I am most grateful are my relatives and friends; I thank you all for your contribution. Thank you parents, for your eternal faith in my capability to finish my graduation research successfully and thank you Jasper, for your fulltime mental support during my final sprint to complete this thesis.

I did it!

Amsterdam, June 2009

Sander Aarts
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1 Introduction

‘Er gaat niets boven Groningen’ [Nothing is better than Groningen], ‘Het kán in Almere’ [It is possible in Almere], ‘I Amsterdam’ and ‘Rotterdam durft’ [Rotterdam dares]. This is just a small sample of the slogans Dutch cities use to express their perceived image. It seems that city branding techniques are used by every Dutch city, but city branding is much more than propagating a catchy slogan. The use of slogans and symbols in brochures and on websites for example, is just a first step of the process of city branding (Tschirhart, 2003). Many Dutch cities have taken this first step now, but how many of these cities have actually set up a marketing communication strategy? Do they use their real estate portfolio to build their image? And does a city’s retail portfolio play a key role in the battle to attract visitors and inhabitants?

1.1 Motive

The following quote shows the importance of city promotion: ‘The globalisation has implied that cities have to deal with high competitive pressure nowadays. In the competition for high-quality companies, well-trained residents and visitors with money to spend, an increasing number of cities and regions are actively involved in strengthening their position. To attract these target groups cities have to do their utmost to obtain a good reputation on a regional, national and international level. Therefore city marketing has become an integral part of the policy and cities and regions to enhance their position on the (inter)national benchmark’ (Ecorys, 2007).

In the introduction of the compilation ‘City Branding, image building & building images’ (2002) Vermeulen cites that Dutch young professionals no longer let themselves be led entirely by pragmatic motives when they choose to live somewhere. Their residence is no longer a lifelong constant, but is subject to changing personal circumstances. ‘The urban context has become a variable in the series of homes one lives in. As well as changing family situations and a new job, self-image is also of decisive importance in the choice of a place to live. Navigating on a widely subdivided network of interests and lifestyles, one’s own image constantly being set against the background of the residential environment’. According to Vermeulen also companies are being seduced by the image of a city. But they are obliged to take into account the residential desires of employees and presence or potential employees, in order to have sufficient labour available. ‘The spreading economic geography gives employees and the self-employed a great deal of freedom of choice, and this means the conditions for companies to establish themselves are becoming increasingly dependent on where people want to live. It can therefore only be to the advantage of cities to position themselves well in a market that is marked by emotion and desire’ (Vermeulen, 2002).

Although the attraction value of a city is judged differently by each individual, some are more popular than others and similarities between them can indeed be distinguished. The historical city centres have a natural head start on the
The Dutch shopping place to twentieth–century industrial cities. The modernist heritage, built by the idealistic adage of light, air and space, is hard to relate to more hedonist qualities such as charming and cozy (Vermeulen, 2002). The appearance and use of extraordinary architecture is considered as one of the tools a city has to communicate with its focus groups. Buildings can affect the behaviour of people and this communication process is highly important for a city’s image, marketability and attractiveness.

The process of city branding can be supported and even be stimulated by the real estate at a specific location. Striking buildings in an inner-city can be used to promote the city and to create a specific, distinguishing image. Usually the inner-city is the main shopping district of a city and its surroundings. So the present retail should be one of the most important triggers of an inner-city. The appearance and image of the present retail property is important to the image of a city. The assumption is therefore, that retail can fulfil an important role in a city’s branding strategy. In the following figure is visualised that city branding techniques can be applied to influence a city’s image, using the present retail, in order to create a strong city brand. The stakeholders in the retail focused city branding process (municipality, retailers and investors/owners) have high impact on the success of city branding.

Figure 1.1: Relation city image, retail and city brand

1.2 Relevance

This master thesis is written in order to complete the Master track Real Estate & Housing (RE&H) of Delft University of Technology. According to the Graduation Guide (Van der Toorn Vrijthoff, 2009) this Master focuses on managing the built environment’s life cycle. Its scientific relevance is in developing theories, concepts and knowledge to improve our understanding of the real estate market and the development and management of the built environment, in particular the match between demand and supply. Its social relevance comes from our contribution to developing knowledge and tools to support management processes and decision making in order to fit real estate with the needs of individuals, organisations and society as a whole. Both the academic and social relevance of this thesis are outlined below.
1.2.1 Academic Relevance

In the academic field some literature has been published concerning city branding in general and city branding of specific cities. Next to that more research is conducted about city branding in combination in relation to corporate branding (Kavaratzis and Ashworth, 1994). Nevertheless there is a gap between the results of research to the branding of specific cities and general findings according to city marketing. Most of the undertaken research studies concern just one single place and these publications have resulted in theories which can be applied on just that single city. Richards and Wilson (2004) for example show the impact of cultural events in Rotterdam on this city’s image. Also (former) students of RE&H undertook research to the relationship between a city’s image and retail and leisure facilities. Zijderveld (2006) for example discusses the surplus value of leisure to the image of Amsterdam. More recently Jadidi (2008) conducted research to the relationship between retail developments in the inner-city and the economical functioning of this inner-city. Just like Jadidi’s thesis this research focuses on the use of retail to obtain competitive advantage. An effort is made to provide more insight in the possibilities of the use of retail in order to brand Dutch cities. It is an attempt to fill the previously mentioned gap between the demand to general information and the available detailed literature concerning the branding of cities.

1.2.2 Social Relevance

The four main Dutch cities (The Hague, Rotterdam, Amsterdam and Utrecht) get a lot of exposure in the media. Next to that these big cities ask consultants to outline their strengths and weaknesses (Brus, 2003). The outcomes of these analyses are used to design a strategy to improve the cities’ images (Olde Monnikhof, 2006). It is not surprising that these four cities apply city branding, in according to their international character, but how about other cities in the Netherlands? The expectation is that smaller cities are using marketing techniques as well to promote themselves, but since this happens on a smaller scale with a smaller budget, the results are not as obvious as from the four previously mentioned cities. On their own scale level though, these cities have to compete against others as well of course. This graduation research can make cities aware of the importance of city branding and shows opportunities to use the city’s retail portfolio to become a strong city brand, in order to create competitive advantage.

1.3 Starting point

‘The conscious attempt of governments to shape a specifically-designed place identity and promote it to identified markets, whether external or internal, is almost as old as civic government itself. City ‘boosterism’ was not a new idea in the nineteenth century but a reaction to the growing competition between places occasioned by the nationalism and globalization’ (Kavaratzis & Ashworth, 2004). But promotion has been accepted as a valid activity for public sector management agencies just 25 years ago (Burgess, 1982). Although city branding is quite a recent phenomenon, city promotion in general has been applied for decades already. This paragraph explores the development of city branding in the Netherlands, using several literature references.
1.3.1 History of city branding

In the article ‘City branding: An effective assertion of identity or a transitory marketing trick?’ Kavaratzis and Ashworth state that ‘the transition from the random addition of some often crude and disembodied promotion to the existing tool box of planning instruments to a more far reaching application of marketing as means of viewing and treating places as a whole used to be neither smooth nor complete. By the beginning of the 1990s there was a serious attempt to create a distinctive place marketing approach (Ashworth & Voogd, 1990; Berg et al., 1990; Kotler et al., 1993). The evolution of marketing of non-profit organizations, the development of social marketing and the introduction of image marketing have led to a fast growth of the use of city marketing (Ashworth & Voogd, 1994).

In an attempt to bring together the development of city promotion Kavaratzis (2008) has drawn up a table that structures the several phases, this table can be found in the appendix. In the first stage fragmented promotional activities are undertaken, in order to promote a single place. Several parties can be involved in the positioning, but their efforts were not centrally managed. The next phase was the step towards the articulation of a city marketing mix, in order to promote the entire city. In this phase the several positioning activities were aligned and centrally managed. Awareness of the significance of the city’s image arised in two distinct senses (Kavaratzis, 2008); ‘First that the image is the crucial and determining factor for the people who use the city and secondly that the city image and the attempt to influence it could be an effective way to coordinate marketing efforts’.

Figure 1.2: Development of city branding

The figure above shows a visualisation of the development of city branding, as discussed in this paragraph. First one single area was promoted (place marketing), next several aspects of the city were promoted (city marketing) and nowadays a city brand is created in order to position the city as a whole (city branding). In the next sub paragraph the transition from city marketing to city branding is outlined.

1.3.2 From city marketing to city branding

The city marketing theory of Kotler (1993) assumes that the city, the product, has to adapt to the requirements and needs of consumers. This outside in approach assumes that the city has to adapt to the external environment. In contradiction to the city marketing theory, the theory of city branding uses the inside out approach. The city, the brand, gets her strength from her own unique identity and values. The transition from city marketing to city branding is facilitated not only by the extensive use and success of product branding, but also by the recently but rapidly developed concept of corporate branding (e.g. Balmer, 2001; Balmer & Greysen, 2003). The application of place marketing is largely dependent on the construction, communication and management of the city’s image, because encounters between cities and their users take place
through perceptions and images (Kavaratz & Ashworth, 2005). People make sense of places through three different processes, which are through planned interventions such as planning and urban design, though the way in which they or others use specific places and through various ways of place representations such as films, novels and news reports. It is generally acknowledged that people encounter places through perceptions and images. Holloway and Hubbard (2001) state that interactions with places maybe through direct experience or the environment or indirectly through media representations. Place branding centres on people’s perceptions and images and puts them at the heart of orchestrated activities, designed to shape the place and its furniture (Kavaratz & Ashworth, 2005).

### 1.3.3 Identity versus image

In order to understand the transition from city marketing to city branding, it is important to recognise the difference between identity and image (Barke and Harrop, 1994). Identity is focused internally and objective. According to a city brand, the brand identity can be considered as ‘what the city really is’ and how it wants to be perceived. The brand image is how the stakeholders think of, perceive and judge the city. It is important to a city that the gap between identity and image is as small as possible. City branding is an instrument to influence the image, to close the gap between identity and image. Cities try to control the perceptions of stakeholders, but this is not always possible. Images can, independent from the elements of the objective reality, simply appear.

![Brand Positions](image)

**Brand Positions**

The part of the city identity and value proposition communicated to a focus group that demonstrates an advantage over the competition.

---

*Figure 1.3: Relation brand identity, position and image (Rainisto, 2003 [adapted]).*
2 Research design

In order to conduct the required research for this thesis, a research framework is drawn up. This framework is outlined in this chapter, using the methodological definitions of De Leeuw (2001). The research method is outlined and the problem is stated by means of the thesis objective and the main research question. After that the use of retail in city branding is defined in the context of the research. In order to structure the process the main research question is split up in several sub questions. Next to a literature review some field research is undertaken, to get insight in the practice of the positioning of Dutch inner-cities. The cases to be explored are presented at the end of the chapter.

2.1 Research typology

For the thesis a qualitative research method is applied, since it is preferred to gain deep knowledge of a limited number of cases above general knowledge of a wide range of cases. In the book 'Basisboek Kwalitatief Onderzoek [Basics of qualitative research] of Baarda, De Goede and Teunissen (2005), the following is stated about qualitative research: 'It is characterising for qualitative research that several sources are used and the emphasis is on the 'understanding' of individuals, groups or situations. Certain flexibility has to be used in the research design, which can change during the research. The research process of qualitative research is cyclic and iterative'. As mentioned in the introduction of this chapter, the required data is gathered by a literature review and several case studies. Since the empery is being observed, this thesis can be considered as an empirical qualitative research. Further on in this chapter a research model is drawn up to provide more insight in the research strategy.

2.2 Problem statement

In the first chapter the urge for cities to have a strong city image has been outlined. Next to that has been stated that the appearance of the inner-city and mainly the present retail determine the city’s image. Strengthening the city’s position as a shopping destination can increase its economically functioning. In this paragraph these assumptions are used to formulate the objective for this research. In order to reach this objective, the main research question needs to be answered.

2.2.1 Objective

According to De Leeuw (2001) the objective shows for whom the research is undertaken, what the outcomes are and why these results are important to the target group. In other words, the objective fixes the relevance of the research. The following objective is formulated for this thesis:

Outlining the role of retail in the positioning of Dutch inner-cities, to gain insight in the opportunities to brand a city as a shopping destination.
2.2.2 Main research question

In the context of the thesis the use of retail in order to create a strong city brand, is called 'retail focused city branding'. Since this term plays a central role in this research, it is defined in the next paragraph. With respect to the main research question De Leeuw (2001) states that it follows the objective but is formulated in for the research useful terms. This question should show which information needs to be gathered to fulfil the objective. The above stated objective is operationalised as follows:

Is retail focused city branding a useful technique to position Dutch cities as shopping destinations?

2.3 What is retail focused city branding?

As mentioned in the previous chapter, the theory of city branding applies the 'inside out' approach. According to this theory a city is considered to be a 'brand'. This brand gets her strength from the city's own unique identity and values. 'The city has to capture this identity and values and to extend them, in order to attract customers (Eleved, 2005). In this paragraph the terms 'city brand' and 'city branding are defined, in order to find a suitable definition for the term 'retail focused city branding', as used in the thesis.

2.3.1 What is a city brand?

Since a city is considered as a brand, the term 'brand' needs some clarification. Several authors have tried to provide a proper description of this term, but Hankinson (2001) states that the accepted definition does not exist. Just like in Trueman’s research (2004) in this master thesis the definition of DeChernationy & McDonald (1998) will be used, since this definition has next to notion of products and services also notion of place. This definition is as follows: 'A successful brand is an identifiable product, service, person or place, augmented in such a way that the buyer or user perceives relevant, unique added values which match their needs most closely.’ This definition discusses both the intangible aspects, like values and assumptions, as the tangible and visual proof like the improved perceptions of the culture and history of the city (Trueman, 2004). Furthermore, its success results from being able to sustain these added values in the face of competition.

The main difference between a city brand and a product brand is that a city brand is not an organisation, with clear borders and internal structures. The uniqueness of a city brand is that it can be seen as a network (Parkerson & Saunders, 2004). The rational elements of a city are not present in an organization, but in a network of many organisations and individuals. The city can be seen as a unique complex network of different stakeholders, like inhabitants, investors, local authorities, tourists etc. Parkerson and Saunders (2004) state that the network city has to deal with several problems. It is hard to focus on the several sources and local politics in a city have an important role. The bureaucratic character of the public sector, does not stimulate the decision making process at all.
2.3.2 What is city branding?

Now the term brand has been clarified, the phenomenon city branding is analysed. Therefore several definitions and views according to the positioning of cities as brands are outlined. Anholt (2005) distinguishes three different ways of city branding; the popular, the simple and the advanced way. This last version can be used for city branding, since it consists of both the simple way (the visual identity; name, logo and slogan) and the advanced way (the entire field of corporate strategy, consumer and stakeholder behaviour and motivation, internal and external communication, ethics and goal). Next to that Anholt states that a city itself cannot be sold, but just its single components like tourism, investment, culture and export. Therefore it is important to promote the city as a brand, to provide the city, as a corporate brand, one clear main identity. In that case the city acts as umbrella brand (Kriekaard, 1994) where the several city products or components are part of, who can be sold to the different focus groups.

Kavaratzis and Ashworth (2005) define city branding as ‘the application of product branding at cities’. Since cities are getting more similar in the functions they provide, branding can be used to promote the added, emotional value of the city instead of the functional aspects. This phenomenon exists already in the field of product branding and is getting applicable for cities as well now. Just like Anholt, Kavartzis and Ashworth also distinguish three types of city branding:

- Geographic branding:
  A physic product is named after a geographic location;

- Product-place co-branding:
  A physic product is marketed by means of associations of a place which deliver a positive contribution to the image of the specific product;

- Branding as place management:
  A technique to influence the identities, perceptions and images of cities.

Since this research focuses on the use of real estate to position a city, the best suitable type of branding is branding as place management. When the term city branding is being used in this thesis, the creation of one overall city image is meant, by positioning the city as a brand.

2.3.3 What is retail focused city branding?

To be able to outline the relation between retail and city branding, the term ‘retail’ needs some clarification to. According to the Oxford English Dictionary, retail is defined as ‘the practice of selling goods in small quantities to the general public’ (Oxford, 2005). Evers (2008) ads the extension ‘to be consumed elsewhere’ to this definition, to point out that retail is the place where the goods are sold. Converting this to a more applicable definition in the context of this thesis, the following definition is drawn up: ‘retail is real estate where the practice of selling goods in small quantities to the general public to be consumed elsewhere takes place. This retail can be used to embed a city as a shopping destination. In this thesis the use of retail in order to position a city brand, is called ‘retail focused city branding’.

2.4 Research questions

The main question (Is retail focused city branding a useful technique to position Dutch cities as shopping destinations?) is divided in several sub questions. These
sub questions ensure that all the required information is gathered and structure the research process.
In order to create a successful product, which is in this case a city brand, one needs to now what its consumers are looking for. Since this thesis focuses on Dutch inner-cities, the factors that determine the attractiveness of an inner-city are outlined. Insight in the motive of consumers to visit this shopping area is required in order find out what these determining factors are. The first research question is:

1. What determines the attractiveness of an inner-city shopping area?

Changing trends in consumer behaviour imply changes in consumer requirements of an inner-city. This affects the retail focused city branding strategy to be used strengthen an inner-city’s position. Relevant consumer trends will be explored and their impact on the positioning of cities will be discussed, so the second research question is:

2. How can retail focused city branding deal with consumer trends affecting the inner-city?

In the introduction of this thesis was already stated that stakeholders have high impact on the success of city branding. Therefore is outlined who these stakeholders actually are. Since the stakeholders need to reach consensus of the content of the city brand, their interests need to be aligned. So an inventory of the in city branding involved parties is required. Similar to the first to research question the stakeholder analysis concerns both a theory and a practice revision. The third research question is stated as follows:

3. What are the interests of the present stakeholders concerning retail focused city branding?

The outcomes of these three research questions are used to draw up a theory framework. This framework enables a research method for the empirical research. This empirical research consists of three case studies, which are selected later on in this chapter. Combining the results of both the theoretical and the practical research will answer the main research question. The fourth research involves the empirical part of the thesis. This question will provide insight in the current positioning of Dutch inner-cities:

4. How is retail focused city branding being applied in the Netherlands?

It is hard to determine or the applied city branding has the desired effect, since the populary of cities depends from many different factors. In order to get more insight in the success of a retail focused city branding strategy, an assessment method needs to be drawn up. The theory framework will assist to assess the positioning stategies. This last sub question is:

5. How effective is the application of retail focused city branding in the Netherlands?
2.5 Research process

As mentioned previously the outcomes of the five sub questions are used to answer the main research question. In this paragraph is discussed how these five sub questions are answered. In order to outline the role of retail in the positioning of Dutch cities to gain insight in the opportunities to brand a city as a shopping destination, several steps are taken. In this paragraph is outlined how this process is structured. In figure 2.1 the research process is visualised.

The first step of the research process consists of a literature review. The theory framework is drawn up in chapter 3 and implies a start of the answering of the first three research questions.

Next to that the theory framework is used to develop a method to assess the effectiveness of currently used city branding strategies. This assessment method is outlined in chapter 4.

To gain insight in the current application of retail focused city branding three case studies are undertaken. In the chapters 5, 6 and 7 these branding strategies are outlined subsequently. Also the assessment method is applied, in order to determine the success of each strategy.

The outcomes of the case studies are compared in chapter 8, to determine the similarities and differences between the three branding strategies and the effectiveness of these strategies.

In chapter 9 the findings from the desk and field research are combined. This alignment provides answers to each of the sub questions. Next the main research question is answered to draw a general conclusion.

Finally in chapter 10 the research process and research outcomes are reflected, in order to provide recommendations for further research.

Figure 2.1: Research process

2.6 Case Studies

In order to get familiar with the current practice of retail focused city branding, three cases are studied. For this multiple case study the methodological guide of Verschuren and Doorewaard (2003) is used. One of the features of a case study these authors describe is the use of a selective and strategic sample. In this paragraph the used selection criteria are discussed, to acquire this sample. Next three cities are selected, that meet these criteria. The branding strategies of these cities will be examined thoroughly. When the case studies are completed, the outcomes are compared by means of a cross-case-analysis.
2.6.1 Selection criteria

Aim of the case studies is to get insight in the current status of city branding in the Netherlands, and especially of the role of the cities’ retail portfolios in the applied branding techniques. To be able to use the outcomes of the case study in the design of city branding strategies for other cities, the selected cities for the study need to be of great diversity. Therefore cities with a varying number of inhabitants and a varying geographic position are selected. The selection criteria are:

- **Size**: One large city (> 250,000 inhabitants), one medium large city (100,000 – 250,000 inhabitants) and one small city (< 100,000 inhabitants);
- **Location**: Each of the three cities needs to be situated in a different province of the Netherlands;
- **Appearance**: The main shopping district needs to be in the inner-city, retail needs to fulfil a key role in the inner-city;
- **Pro-active city branding**: Each of the three cities needs to apply city branding techniques in a conscious way;
- **Strategy**: Each of the three cities needs to have a city branding strategy that is different from the other two;
- **Retail**: The retail portfolio needs to be an important tool in the city branding of each of the three cities.

2.6.2 Selected Case Studies

Using the selection criteria discussed in the previous subparagraph, three cities are selected for the case studies. The chosen large city is The Hague, the medium large city is Almere and the small city is Roermond. The following figure shows some important features of the selected cities. Previously has been mentioned that the cities have to be of great diversity, figure 2.2 shows this variety. The three cases are shortly introduced below. The actual case studies can be found in the chapter 5, 6 and 7.

<table>
<thead>
<tr>
<th>Feature</th>
<th>The Hague</th>
<th>Almere</th>
<th>Roermond</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inhabitants</td>
<td>482,750</td>
<td>185,940</td>
<td>54,500</td>
</tr>
<tr>
<td>Retail units</td>
<td>1,436</td>
<td>548</td>
<td>798</td>
</tr>
<tr>
<td>Retail floor space</td>
<td>183,600 m²</td>
<td>86,000 m²</td>
<td>55,000 m²</td>
</tr>
</tbody>
</table>

*Figure 2.2: Features of the selected cities (Locatus, 2009)*

**The Hague**

The Hague is the third largest city in the Netherlands, with a population of approximately 482,750 (as of January 1\(^{st}\), 2009). The city is located in the province of South Holland, of which it is also the provincial capital. The Hague is the facto seat of government but not the Dutch capital and all government ministries, foreign embassies international Court of Justice and the royal family have there settlement here. Next to these public facilities
the inner-city offers a lot of retail facilities to. The main shopping area is located at the Spuistraat, Grote Marktstraat, Venestraat, Haagsche Bluf, Haagsche Passage, Hoogstraat and Noordeinde. According to figures of Locatus 1.436 retail units are located in the inner-city anno 2009. Shopping centre Babylon is part of the inner-city too, but since it is not directly connected to the rest of the inner-city retail portfolio, it is not part of The Hague’s prime shopping area. Therefore this shopping centre will not be taken into account in the case study.

Almere

Almere is a medium large city at the moment with 185.940 inhabitants (2009, January 1st), but has the ambition to become the fifth largest city in the Netherlands. Almere was established in 1970’s as cross over of Amsterdam and is the fastest growing city in Europe. Anno 2030 the city should have 350.000 inhabitants. Since Almere is still a relatively young and therefore unknown city, it has a strong need to position itself. The main shopping area of Almere is located in its inner-city. Recently this inner-city was extended, in order to be prepared for the enormous population growth. The old part of the inner-city is concentrated around the Stationsstraat and is nearby the central station. The extension, called Stadshart, is situated next to this area and the master plan for this retail area was designed by the famous architect Koolhaas. In total the inner-city counts approximately 550 retail units according to Locatus. The shopping area fulfils both a suburb and regional function. Next to the inner-city two big shopping centres are located in Almere Haven and Almere Buiten.

Roermond

The last city to be examined is Roermond, a famous shopping destination for especially people from the south of the Netherlands and across the German border. With approximately 54.500 inhabitants (2009, January 1st) it is considered as a small city. Roermond’s inner-city has many retail facilities. According to Locatus almost 800 retail units are located in the inner-city, which is an enormous number in comparison to The Hague and Almere. The main shopping streets are Munsterstraat, Steenweg, Neerstraat and the shopping centre Roercenter. At the north-east side of the inner-city is the Designer Outlet Centre (DOC) located. The DOC has over 120 different shops and almost 3 million visitors per year. It is one of the biggest tourist attractions in the Netherlands. This centre (27.000 m² of retail floor space) is not part of the inner-city but since it attracts such an enormous number of visitors it is taken into account in the case study. Next to these two retail cluster two new shopping areas were developed recently; a Retail Park that hosts large chain stores and the adjacent Huis & Tuinboulevard for furniture and garden supplies.
In this chapter relevant literature is reviewed, in order to draw up a theory framework. A short introduction of the Dutch city will be followed by outlining the determining factors of an attractive inner-city and the consumer behaviour of its users. Next several trends are discussed that affect Dutch inner-cities, in order to explore how city branding techniques can be applied in order to assist the inner-city in adapting to its changing context. Trends that affect the inner-city are the increasing popularity of internet shopping, the decreasing accessibility of inner-cities and several trends in the retail sector. Next a stakeholder analysis is undertaken in this chapter and the process of retail focused city branding is outlined.

3.1 The Dutch inner-city

City centres used to be functional entities where production and trade took place, which was deterministic to According to VROM (2003) the economy in the inner-city has developed in de last decade, from business to business activities to public facilities and leisure. The most important leisure activity that people undertake in the inner-city is shopping. Shopping is eventually the most important motive to visit a city centre (Drost et al., 2006). Inner-city retail not only attracts a lot of visitors, it also creates employment. These employees and visitors together enable a vibrant inner-city.

3.1.1 Attractiveness of the inner-city

The attractiveness of the inner-city is highly important for the image of the entire city. An attractive city is like a magnet to people, culture and entrepreneurship. The inner-city determines the appearance, reputation, and vitality of a city (HBD, 2009). In most cities the inner-city is the city’s main shopping area. The inner-city is the hart of the town and of all the retail in a (medium size) city approximately 50% is located in the inner-city (HBD, 2001). Therefore the attractiveness of the inner-city depends on the present retail and the functioning of these retail facilities. Off course retail is not the only determining factor of a city’s attractiveness. This attractiveness is determined by a marketing mix of the following aspects:

- Retail;
- Leisure;
- Culture;
- Events;
- Accessibility;
- Parking facilities;
- Safety and hygiene.

An attractive inner-city offers offers a mix of retail, leisure and cultural facilities. The organisation of events attracts visitors and creates a vibrant inner-city. Also the accessibility by both car and public transport are of decisive matter to people when they think of visiting the inner-city. Especially to non-residents a good accessability is highly important. When these non-residents arrive at the inner-
city by car the availability of sufficient and affordable parking facilities is determining their first impression of the city. Looking at the present retail in an attractive inner-city, several common features are noticed.

According to Boekema four factors can be distinguished that determine the image of an inner-city in general and the main retail area in particular:

- Existence of a characteristic atmosphere;
- Concentration of a big variety of functions, companies, activities and public spaces;
- Existence of specialized shops and warehouses. Next to diversity the number of shops with the same assortment is important, in order to create a mix of options and quality;
- The impression of crowded shopping streets contributes to a vibrant inner-city.

3.1.2 Shopping in the inner-city

As stated previously shopping is the most important reason why people go to the inner-city. There are several types of shoppers to be distinguished in the inner-city. At first inhabitants of the city centre and people who are employed in the city shop for their daily needs. Visitors of the inner-city usually have a different intention to go shopping; as a leisure activity. This second type of shopping, recreational shopping, takes much more time than intentional shopping. In the following figure the two types of shopping are outlined.

![Figure 3.1: Intentional shopping versus recreational shopping (Evers, 2008)](image)

In case of intentional shopping it is all about convenience. Accessibility of the retail location and a wide and deep assortment to be able to compare in order to make rational decisions at the best price are crucial. Recreational shopping on the other hand is more focused on the experience of the retail location. The shopping behaviour of customers in the inner-city can usually be considered as recreational shopping, the number of visitors of the inner-city is much larger than the number of inhabitants that want to do their intentional shopping. From figure 3.1 can be deducted that a specific inner-city distinguishes itself from its competitors, by providing a unique atmosphere. Also the importance of a specific image is emphasised, which is influenced by city branding.
3.2 Trends affecting the inner-city

Nowadays trends in consumer behaviour change rapidly. Due to customers’ constantly changing requirements, retail facilities need to be very adaptable. In the previous paragraph was mentioned that customers in the inner-city are considered to be recreational shoppers. They are triggered by the in a shopping area present atmosphere and want to be entertained. Originally this shopping entertainment was found in the inner-city, but nowadays several trends make retail clusters in the periphery more interesting for customers to go to. According to Zandbergen (2009) the visiting numbers of inner-city retail areas are decreasing rapidly. This paragraph discusses the trends that affect the shopping behaviour of customers in the inner-city.

3.2.1 Ad hoc consumerism: convenience and fun

As a result of social developments (employment, aging, household size and the multicultural society), there is a significant development in terms of ad-hoc consumerism. Different household compositions, consuming and experiencing have impact on consumer behaviour. The current consumer behaviour can be described in terms of ‘convenience’ and ‘fun’. Convenience means that everything a consumer needs has to be nearby, with the key words efficiency and accessibility. Entertainment implies that the atmosphere of the area where a consumer does his shopping, needs to be amusing (recreational shopping as a form of leisure, pamper yourself). City branding can make potential consumers aware of the accessibility of an inner-city and it is also a useful technique to emphasise the entertainment the specific inner-city has to offer.

3.2.2 Internet Shopping

Online shopping is becoming more and more popular. In 2006, 1% of consumption spending existed of internet shopping and mail order business. According to recent figures from HBD / CBS it’s now 4.5%. Locatus assumes that this online shopping will increase to 10 to 15% of the total number of purchases in the next couple of years. A large proportion of consumers’ online purchases are made at the expense of spending in the regular shops. This implies that the number of consumers that visit the inner-city to do their shopping is decreasing. To keep consumers committed to the physic retail in the inner-city, promotion is needed.

3.2.3 Up-scaling

This trend stems from the desire of retailers to cost reduction and market enlargement. With up-scaling in the context of increasing market size, the retailer tries to respond to the needs of the consumer concerning convenience and entertainment (inspire and experience). On the other hand they anticipate to the need of sufficient space to present the full range of their products. In 1968, the average shop surface was 35 m². Currently it is an average of 252 m² per retail unit (Bruigom, 2008). The effects of scale when it comes to the consumer required quality and completeness for the inner-city’s retail structure by the disappearance of small shops and especially interdependent retailers. But especially these specialized shops create the so desired coleure locale in an inner-city, so from the point of view of city branding it is import to the city to keep this trend in control.
3.2.4 Increasing number of chain stores
For years the number of chain stores in the inner-city has grown. The increasing dominance of chain formulas has both advantages and disadvantages. Since chain retailers are able to pay higher rents, the rents in the inner-city increased. Present interdependent entrepreneurs are not able and not willing to pay these high rents anymore, and leave the inner-city. Since these interdependent retailers enhance differentiation from other retail areas, inner-cities are losing their distinctive position more and more. Previously in this paragraph was mentioned that customers want to be entertained. Lack of differentiation does not enable an inner-city to distinguish from the competition anymore. Luckily there is a growing awareness that the increasing number of chain stores is a threat to the attractiveness of inner-cities. The aim therefore is to achieve a better balance between chain stores and small interdependent stores. Chain stores offer advantages to; they have attraction power since they fulfil an anchor function in shopping street. Interdependant retails situated in these streets benefit from the attracted consumers.

3.2.5 Accessibility under pressure
Despite the increasing mobility of consumers in the Netherlands, their opportunities to access the inner-city are decreasing. In many inner-cities cars are abandoned and the places where cars are still allowed are turned into one-way streets. This decrease of the accessibility of inner-cities is a motive for potential visitors to go shopping in a periphery retail cluster. Next to a decreasing accessibility by car consumers also have to deal with rising parking fees once they arrive in inner-city. These political issues result in reduction or change of consumers’ mobility and have high impact on the visiting numbers of the inner-city.

3.2.6 Resume
In this paragraph several trends were discussed that pressure the number of customers an inner-city attracts. The increasing number of online purchases, the raising popularity of periphery retail locations among retailers as a result of up-scaling. Especially when their desire to coleure locale is not satisfied in the inner-city due to the increased number of chain stores, customers will go shopping in retail areas that offer more convenience in terms of accessibility and parking facilities. Therefore less customers visit the inner-city, which involves a revenue decrease of the retailers located in the inner-city. City branding can be a useful tool to position the inner-city to strengthen its position. The inner-city usually offers much more experience in terms of atmosphere and livestyness. So a city brand that emphasises the existence of these factors in the inner-city can convince customers to go shopping downtown instead of in the periphery. Such a strong city brand can assist the inner-city to compete with these better accessible retail areas. Next to that city branding can create new demand to retail facilities, since it makes customers familiar with attractive features of the city, of which they were not aware of before. Retail focused city branding is a useful technique to aware consumers how the in the inner-city present retail meets their requirements, in order to improve its economic functioning.
3.3 Stakeholder analysis

In order to apply city branding techniques successfully, knowledge concerning the present stakeholders and their specific requirements is essential. In this paragraph is outlined which stakeholders are involved in the retail focused city branding process. In the field of city branding a city is considered as a network. This stakeholder network is outlined using the relational network brand theory of Hankinson (2004). Next to that the interest of each stakeholder in city branding is discussed.

3.3.1 Which stakeholders are involved?

To realise a successful city brand the several stakeholders need to be known thoroughly. In the literature the existing stakeholders are categorized in different ways. Van den Berg et. al. (1990) and Ashworth & Voogd (1990) for example state that these stakeholders are categorized in residents, companies and visitors. The following table shows four ways to categorize the stakeholders. For this thesis the categorisation of Braun et. al. (2003) will be used, since it considers not only the current but also the potential city’s customer groups. Retailers are an important party in the stakeholder group ‘companies’. Real estate developers that operate in the inner-city belong to this group as well. According to Ploegmakers (2009) retailers are more aware of the importance of city branding than real estate developers. In order to optimise the functioning of the inner-city, retailers should participate in an early stage of a development project. The third group concerns both the city’s current visitors and the potential visitors which could be attracted by the city branding and the last category of customers implies (potential) investors in the inner-city. An important stakeholder that is not taken into account in figure 3.4, are local authorities. None of the authors have mentioned the municipality of the city to be branded. Since the municipality is usually the facilitator and accelerator of retail focused city branding, this party should be considered as a stakeholder as well.

<table>
<thead>
<tr>
<th>Categories</th>
<th>I</th>
<th>II</th>
<th>III</th>
<th>IV</th>
</tr>
</thead>
<tbody>
<tr>
<td>City’s users</td>
<td>Residents</td>
<td>Companies</td>
<td>Visitors</td>
<td></td>
</tr>
<tr>
<td>(Van den Berg et al., 1990,</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ashworth and Voogd)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Target markets of place</td>
<td>Residents</td>
<td>Business</td>
<td>Visitors</td>
<td>Export</td>
</tr>
<tr>
<td>marketers (Kotler et al., 1999)</td>
<td>and employees</td>
<td>and industry</td>
<td></td>
<td>markets</td>
</tr>
<tr>
<td>Place customers</td>
<td>New</td>
<td>Producers of</td>
<td>Tourism and</td>
<td>Outside</td>
</tr>
<tr>
<td>(Ranisto, 2003; Kotler et al., 2002)</td>
<td>residents</td>
<td>goods and</td>
<td>hospitality</td>
<td>investments</td>
</tr>
<tr>
<td>General customer groups</td>
<td></td>
<td>services</td>
<td></td>
<td>and export</td>
</tr>
<tr>
<td>(Braun et al., 2003)</td>
<td></td>
<td>(potential)</td>
<td></td>
<td>markets (potential)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>companies</td>
<td></td>
<td>investors</td>
</tr>
<tr>
<td></td>
<td></td>
<td>(potential)</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>visitors</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Figure 3.2: Stakeholders in retail focused city branding
3.3.2 The inner-city as a network

In the previous chapter has been stated that a city is considered as a brand in the city branding field. The uniqueness of a city brand is that it can be seen as a network (Parkerson and Saunders, 2004). The rational elements of a city are not present in an organization, but in a network of many organizations and individuals. The city can be seen as a unique complex network of different stakeholders, like inhabitants, investors, local authorities and visitors. According to Castells (2000) this complexity makes it impossible to manage all the different components of a city, in order to achieve one single goal. The larger a city is, the more difficult the coordination of the city is. To be able to control this complexity, Hankinson (2004) considers cities as ‘relational brand networks’. From his perspective brands have relationships with stakeholders. Important in Hankinson’s conceptualisation are the following marks:

- The notion of the consumer as a co-producer of the city brand;
- The experimental nature of place-consumption;
- Marking networks as vehicles for integrating all stakeholders in a collaborative partnership of value enhancement.

In figure 3.3 Hankinsons relational network brand is shown. In the context of this thesis the inner-city is considered as the core brand. The success of this core brand depends on the relationships with consumers, brand infrastructure, primary services and the media. In the process to create an attractive inner-city it is crucial to maintain these relationships and the relationships between the several stakeholders. In this research the focus is on the primary service relationship, which is concerned with the services at the core of the city brand experience.

![Figure 3.3: The relational network brand (Hankinson, 2004)](image-url)
3.3.3 Interest of the stakeholders

Next to good relationships between the several stakeholders, their individual interest in retail focused city branding plays an important role. These interests are not always aligned and can cause big disturbances in the process. The intention is that city branding provides surplus value to each of the stakeholders. In order to get insight in the interest of the several in retail focused city branding involved parties a model is drawn up, using the stakeholder analysis Braun (2008) has conducted for city marketing.

<table>
<thead>
<tr>
<th>Stakeholder</th>
<th>Interest in retail focused city branding</th>
</tr>
</thead>
<tbody>
<tr>
<td>Residents</td>
<td>An attractive place to do their intentional shopping</td>
</tr>
<tr>
<td>Retailers</td>
<td>An attractive place to do business, in order to attract customers</td>
</tr>
<tr>
<td>Visitors</td>
<td>An attractive place to do their recreational shopping</td>
</tr>
<tr>
<td>Investors</td>
<td>An attractive place to invest, in order to make money</td>
</tr>
<tr>
<td>Municipalities</td>
<td>Strengthening the city’s position, in order to facilitate the other stakeholders</td>
</tr>
</tbody>
</table>

Figure 3.4: Interest of stakeholders in retail focused city branding

Figure 3.4 shows the surplus value of city branding for each stakeholder, which should be the driver to commit themselves to the retail focused city branding process. But what a surplus is for one stakeholder can cause a negative effect to the others. Real Estate investors for example participate in city branding since it results in a growth of their real estate portfolio’s value. When the city branding attracts more potential customers, retailers are more eager to settle down at the branded location, which implies a possibility for the investors to increase the rents. From the retailers’ perspective on the other hand, a rent increase is a negative effect of retail focused city branding.

3.4 The process

There is very few information available concerning the process of city branding. Most of the sources outline the design of a city brand. They seem to forget that the process of implementing the brand is influencing the successes of the city branding as well. In this paragraph the found literature concerning branding techniques and the branding process are discussed and applied to retail focused city branding. These findings will result in a city branding process model.

3.4.1 Strategic decisions

Several strategic decisions have to be made in the process of city branding. According to Rainisto (2003) the following three steps have to be taken, in order to obtain a successful city branding strategy:

- Choice of a brand name:
  - In case of city branding this could be al slogan with the name of the to be branded city in it;
- Brand positioning:
  - This is a fundamental decision to be taken. A city has to position her strengths, favourite and unique associations, in order to create a positive and strong image. The positioning identifies the city brand in the market, compared to the competition;
The complete marketing program:
The goals, strategy and the tactics are derived from the brand positioning.
This decision process can guide the decision makers through the process of developing a city brand. In the next sub paragraph is outlined how this city brand could be applied.

3.4.2 City branding techniques

Kavaratzis (2004) suggests three city branding techniques. These techniques are designed to get the attention of focus groups (brand awareness) and to develop associations between the city and its attributes (brand utility). The three city branding techniques are outlined below:

- **Personality branding:**
  This technique names the city after a specific person who has fulfilled an important role for the city (or still does). A famous example is Barcelona, where Gaudi's architecture has had a big impact in putting the city on the map.

- **Flagship construction:**
  When there is a big real estate development, the city or a specific region can use the name of the project as a brand name or as a trigger. The development of the Designer Outlet Centre in Roermond for example was used to attract visitors to the entire region, by means of enhancing combination visits.

- **Events branding:**
  In the Netherlands this is the most common and well known technique. A lot of cities try to improve their image by organizing specific events and festivals. This can be music, culture or art events for example. On a bigger scale; when a city organizes the Olympic Games the entire world will consider the brand of this city as Olympic Games city.

According to retail focused city branding, the most suitable techniques are flagship constructions and events branding. When a flagship construction is being applied the retail itself is being used to brand the city, as showed with the example of the Designer Outlet Centre in Roermond. In case of event branding activities that have to do with retail are organized. Examples are the weekly Sunday sales in the inner-cities of The Hague and Amsterdam. Another event is the 'Stiletto run', an annual event in the high-end shopping street P.C. Hoofdstraat in Amsterdam. The Stiletto run is a short distance run that only allows women on high heels to subscribe. The prize for the winner is a certain amount of money to shop at the P.C. Hoofdstraat. This event provides the high-end shopping street a lot of free publicity.

3.4.3 City branding process model

In ‘Selling the city: marketing approaches in public sector urban planning’ Ashworth and Voogd (1990) state that the marketing of cities needs to meet several important conditions in order to obtain the desired result. These conditions are also relevant for the process of retail focused city branding:

- **Promotion needs product development:**
  The products an inner-city has to offer need to be of good quality, otherwise promotion will not have much effect. In the context of this
thesis product development can be considered as the efforts to offer a variety of retail (and leisure) facilities that meet the requirements of the focus groups;

- Promotion needs knowledge:
  Deep knowledge of the inner-city is required, in order to determine its unique features. Knowing how to strengthen these features is considered to be an important condition. Also extensive knowledge of the city’s consumers is needed to develop a city brand;

- Promotion needs communication:
  Communication is the most important instruments to reach consumers. Not only what is being communicated needs to be clear, or the message is being understood and accepted, is much more important. Using the information they get, focus groups get preconceptions about an inner-city. These preconceptions will create the city image.

Using the literature discussed in this paragraph, a process model for retail focused city branding is drawn up. In this model the process is divided into two parts. The model is shown in figure 3.6.

![Figure 3.6: Retail focused city branding process](image)

The first step of the branding process concerns the development of the city brand. One needs to have deep knowledge of the inner-city in order to determine the inner-city’s unique features. These unique selling points are used to create the city brand. Largely distinguishing feature strengthen the city brand, since they assist the brand in being different from the competition. When the city brand has been designed consumer groups are segmented. Next focus groups are chosen to distribute the city brand to.

The second step of the city branding process concerns the implementation of the city brand. When the focus groups are outlined a strategy to reach these potential customers is drawn up. This strategy consists of three aspects; promotional, spatial and organisational elements. Promotional elements concern the marketing activities to be undertaken, like designing a brand logo and slogan, advertising and organising promotion events. The spatial elements concern (re)developments of retail property to suit the retail portfolio to the city brand and improving the infrastructure and routing in the inner-city. The third
aspect concerns the organisation of the branding process. An organisation structure is needed that suits the city branding strategy and the city to be branded. When the organisation is aligned the retail focused city branding strategy is implemented.

3.5 Conclusion

Using the outcomes of the literature review, a first attempt is made to answer the first three research questions.

What determines the attractiveness of an inner-city shopping area?

In paragraph 3.1 is stated that the attractiveness of the inner-city depends from a marketing mix of the aspects retail, leisure, culture, events, accessibility, parking facilities, safety and hygiene. Looking at the present retail is concluded that attractiveness is determined by:

- Presence of a characteristic atmosphere;
- Concentration of a big variety of functions, companies, activities and public spaces;
- Presence of specialised shops and warehouses, to offer a mix of options and qualities;
- The impression of crowded shopping streets contributes to a vibrant inner-city.

How can retail focused city branding deal with consumer trends affecting the inner-city?

In paragraph 3.2 several trends were discussed that pressure the number of customers an inner-city attracts, like the growing popularity of internet shopping and the conveniences people experience when they go shopping in the periphery. But today’s consumers want to be entertained and the inner-city has a lot of entertainment to offer. Therefore a city brand that emphasises the existence of colore locale and a pleasant atmosphere in the inner-city, can convince customers to go shopping downtown instead of in the periphery. Next to that city branding can create new demand to retail facilities, since it awares potential customers of the attractive retail facilities an inner-city offers.

What are the interests of the present stakeholders concerning retail focused city branding?

The several stakeholders are outlined in paragraph 3.4. Residents want an attractive place to do their intentional shopping. Retailers aspire an attractive place to do business, in order to attract as much customers as possible. Visitors are looking for an attractive place to do their recreational shopping, they want to be entertained. Investers want to optimise the value of the assets they invest in, in order to optimise their revenues. Municipalities aspire to strengthen the inner-city’s position, in order to facilitate the other stakeholders.
The second part of this thesis implies a field research to the use of retail focused city branding. In order to answer the fourth and fifth research question the branding strategy of the cities The Hague, Almere and Roermond is discussed. Next to getting insight in the application of the current use of retail in the positioning of cities the success of this city branding examined. In this chapter is outlined how the case studies will be conducted. In order to determine the effectiveness of the retail focused city branding strategies an assessment method is developed. The case studies themselves can be found in the next chapters.

4.1 Case study method

The three cities that are studied differ widely. Not only has each city its own unique inner-city retail portfolio, but also the applied branding strategies are quite different. For each case the available policy documents are object of study. Next to that information is gathered by interviewing stakeholders. For each of the three cities at least one public stakeholder (municipality) and one private stakeholder (retailer, developer or investor) were interviewed. In order to be able to compare the strategies a universal case study method is used to analyse each of the city brands. The outcomes of the literature review are used to develop this method. The case study method is outlined below and visualised in figure 4.1.

The first step of the case study is the description of the city brand. Next the inner-city is outlined shortly to determine its attractiveness, followed by the interest the specific city has in retail focused city branding.

Secondly the city branding strategy is outlined, using information from policy documents and several interviews with shareholders. Special attention is paid to the role of retail in the branding strategy.

Next the implementation of the retail focused city branding strategy is outlined. An organisation scheme is drawn up and the involvement of stakeholders is discussed.

The last part of each case study concerns the assessment of each strategy in terms of effectiveness. The impact of the strategy on both the retail demand and supply in the inner-cities is discussed.
4.2 City branding effectiveness

In case a city brand is developed in order to position an inner-city as a shopping destination, the in this city present retail facilities need to fit into this brand. This implies that the chosen retail focused city branding strategy, affects the retail supply in the inner-city. In order to gain insight in the effectiveness of the strategies discussed in the case studies, the present retail supply is discussed. Next to its physical impact city branding also affects the demand to retail facilities. Therefore changes in consumer behaviour in the inner-city are discussed as well. In this paragraph the variables used to determine the effectiveness of the retail focused city branding are operationalised.

Most of used variables are defined by Locatus, a Dutch independent retail market research company. Locatus has mapped all Dutch retail and updates its databases every year. The data is stored in an online database, which is accessed with a database software program called the ‘Locatus Verkenner’. This program is used to collect information of the retail supply in The Hague, Almere and Roermond. Next to that data concerning the numbers of consumers in the inner-cities and consumer flows is derived from the Locatus Verkenner.

4.3 Supply

The present retail portfolio in an inner-city can be divided in several branches. This branch classification is the first supply variable to be assessed. The second variable concerns the number of vacant retail units in the inner-city, called vacancy rate. In this paragraph these two variables are outlined.

4.3.1 Branch classification

A branch is a general term for a group of retail units that sell similar products. Locatus distinguishes 27 different main branches, which are sub divided in 225 branches. Since not all these main branches are relevant for this thesis, only 6 of them are examined. The first 5 branches concern the direct selling of consumer goods. These branches are defines as follows:

- Daily: Food and personal grooming
- Fashion and Luxury goods: Warehouse, fashion, shoes, jeweller and optometrist, household appliances, antique and art
- Sports, games and hobby
- Home decoration and DIY (Do It Yourself-stores)
- Retail etcetera

To be able to use these branch names in the data processing, they are renamed. The operationalised branches are:

- Daily
- Fashion
- Hobby
- Home
- Etcetera

The focus of this thesis is on the use of retail in the positioning of cities. But also leisure facilities determine the attractiveness of an inner-city. The present catering facilities like lunch rooms, restaurants, bars, fast-food enterprises and hotels have high impact on the city image. Therefore the catering branch is taken into account as well. This branch is operationalised as ‘leisure’.
4.3.2 Vacancy rate

The second supply variable to be assessed is the vacancy rate. The vacancy rate is the percentage of the total retail supply that is not in use. An important feature of the retail supply in an inner-city is the number of vacant stores. A relatively high number of unoccupied stores has negative impact on the atmosphere in the shopping area. This results in a less attractive inner-city. Next to attracting customers also attracting retailers can be an objective of the applied city branding. A decrease of the vacancy rate shows that the positioning of the inner-city has the desired effect in this case.

4.4 Demand

In order to get insight of the results of retail focused city branding in terms of consumer behaviour, several demand variables are examined. These variables are total visitor number, the average length of stay of the visitors and the so-called ‘consumer flows’. These consumer flows result in retail location classifications, as defined by Locatus.

4.4.1 Consumer orientation

The city branding strategies to be assessed position their inner-city as a shopping destination in order to attract customers. To gain insight in the success of these efforts several aspects of consumer behaviour are examined over a period of time. The total numbers of visitors of each inner-city in 2004 and in 2009 is compared. Next to that the length of stay in the inner city is discussed. This is the average period of time that visitors spend in the inner-city. If available the origin of the visitors is discussed to. This information is not derived from Locatus, but from market reports. These market reports are written by consultancy firms, by order of the municipalities of The Hague and Almere. These figures show the city branding effects on the super regional level.

4.4.2 Retail location classification

The second variable to be examined is the consumer flow. A consumer flow is described as the average number of potential buyers that passes by a specific shop on a Saturday (Locatus, 2009). City branding is used to extend the reputation of that city and to make potential visitors aware of its unique selling points. Making customers aware of everything the inner-city has to offer should imply in a wider spread of the visitors through the area.

Bolt has determined five different location types, regarding the number of visitors that pass by a specific retail location. These location types provide insight in the density of customers at each specific location. The percentage of the total number of visitors that passes by a retail location classifies this location as follows:

- A1 location: 75 – 100 %
- A2 location: 50 – 75 %
- B1 location: 25 – 50 %
- B2 location: 10 – 25 %
- C location: 5 – 10 %
To be able to use these retail location classifications in the data processing, the classifications are visualised on a map derived from the Locatus Verkenner. The different retail location classifications are marked as follows:

- A1 location: Red
- A2 location: Orange
- B1 location: Yellow
- B2 location: Dark blue
- C location: Light blue
- Not available: White

4.5 Match

An effective retail focused city branding strategy should result in a proper match between the retail demand and supply. This match of demand and supply implies that consumers meet their requirements in the concerning inner-city. In order to get insight in the success of this match the consumer appreciation of the branding strategies to be examined is discussed. A high rewarding is the result of a good match of retail demand and supply. Unfortunately Locatus does not provide figures concerning consumer satisfaction, so they have to be found elsewhere. Luckily more and more municipalities ask external companies to monitor the performance of their city. One of the things these external consultants assess is the consumer appreciation. For the case studies this rewarding is presented as an average mark on a scale of 1 to 10.
5 The Hague
5.1 Introduction

The Hague is positioned as 'International city of Peace and Justice'. Its inner-city is positioned as an international shopping destination, with a wide range of high-end retail facilities. The international aspect of the city is derived from the large number of international consumers in the city. This is due to the presence of the International Council of Justice, the international embassies, the headquarters of several multinationals that are located in the city and the many tourists that visit The Hague in combination with Scheveningen. The inner-city is positioned as a retail area with allure and The Hague is proud to offer the largest number of high-end stores in the Netherlands. The inner-city has many different faces, since several retail clusters can be distinguished. Each retail cluster has its own unique atmosphere. Since the sub areas are situated next to each other they are all on a walking distance.

5.1.1 Attractiveness of the inner-city

As mentioned above The Hague’s inner-city is characterised by a range of different atmospheres within the shopping district. The ‘Grote Marktstraat’ and the ‘Spuistraat/Vlamingstraat’ are considered as the main shopping streets, mostly franchise formulas are located here. The ‘Haagsche Passage’ is a monumental shopping centre with a lot of allure. And the Noordeinde/Prinsenstraat area hosts mainly small specialized shops, run by interdependent retailers. This diversity in shopping areas provides the city a unique atmosphere. The following figure shows the different sphere area’s in The Hague’s inner-city.

Figure 5.2: Sphere areas inner-city The Hague (The Hague, 2008)
A second factor that determines the attractiveness of a city is the concentration of a big variety of functions, companies, activities and public spaces. In The Hague’s inner-city are many office buildings, mainly used by public parties, of both the government and the city’s municipality. The variety of hotels in the inner-city provides The Hague an international character. There are two squares in the inner-city, ‘Het Plein’ and the Grote Markt’, where a lot of restaurants and bars can be found. Overall can be concluded that the inner-city is not only used for shopping purposes but also supplies in other functions. Due to this function mix a lot of people ‘use’ the city during the day. The impression of crowded shopping streets contributes to the shopping area’s cosiness and attractiveness.

As mentioned previously the inner-city has several clusters with specialised retail. These shops are unique and attract many customers. Next to that the main warehouses, Bijenkorf, V&D, C&A and Hema, are located in the inner-city. Another attractive and more unique warehouse is Maison the Bonneterie, which offers more exclusive products. The diversity and the number of shops offer a mix of different options and quality for different focus groups.

5.1.2 Interest in city branding

In their Detailhandelsnota The Hague states its ambition to improve the retail facilities in the inner-city: ‘The inner-city of The Hague needs to be considered as one of the best retail cities on the (international) benchmark’ (The Hague, 2005). Next to that the city wants to increase the attractiveness of its inner-city with international retail formulas. This ambition aroused from findings in ‘Koopstromen Onderzoek Randstad 2004’, which states that the inner-city of The Hague should be able to perform better as a super regional shopping area.

A consortium of BRO (retail consultancy) and Cushman & Wakefield, Healy & Baker (retail property agency) was asked to conduct research to The Hague’s opportunities to become the desired international shopping destination. This consortium has concluded that the inner-city of The Hague had a lot of unused potential in 2005. In their report ‘Den Haag internationale winkelstad’ the consortium stated the following about the positioning of The Hague’s inner-city:

- The inner-city has improved strongly in case of the supply and appearance;
- The inner-city has several sub areas with a specific and unique profile;
- Recreational shopping is often not the main purpose to visit The Hague;
- The Hague is not the city (international) retailers establish themselves at first;
- Expansion of unique formulas is desired;
- The reputation of the inner-city concerning retailers can be increased;
- The serving area of the inner-city can be expanded, even the partition has a high visitors potential left.

In their report ‘Den Haag internationale winkelstad’ the consortium has placed The Hague in an international perspective and has compared its inner-city with those of six famous shopping cities in Belgium, Germany and Great Britain, like Antwerp and Manchester. They have concluded that The Hague has a relative large retail portfolio compared to these cities but smaller passenger flows. The fashion branch was represented less strongly in The Hague and the number of furniture, art and antique stores on the other hand turned out to be much larger.
than in the reference cities. Next to that a comparison with Dutch cities has revealed that the turnover per m² retail floor space in The Hague, at € 7.160 per m², is below the turnover in Utrecht en Rotterdam.

5.2 Branding

The Hague is in the race to become one of the best shopping cities in the Netherlands, and aims to be an international shopping city. In 2001 Binnenstadsplan 2000-2010 has been drawn up, titled ‘Binnenstad Buitengewoon’. This policy document is the integral policy framework for the upgrading of The Hague’s inner-city. The plan focuses on the cohesion of all those aspects which are important to the city centre like culture, safety, leisure facilities and especially retail facilities. The input of the consortium of BRO/Cushman has been used to position The Hague as an international shopping city and the results of these positioning efforts are paying of now.

Main objective of ‘Binnenstad Buitengewoon!’ is increasing the attractiveness on behalf of a better economically functioning of the inner-city. The aimed result is an increase of the number of visitors (27 mln in 1997), of at least 15% (The Hague, 2001). In order to achieve this Bureau Binnenstad wants to:

- Attract more visitors from outside;
- Increase the average length of stay;
- Increase the expenditures per visit;
- Realise a more positive judgment of the attractiveness, by both visitors and inhabitants.

In order to acquire the desired international retail formulas BRO/Cushman have done the following recommendations, which are used by Bureau Binnenstad to design the city branding strategy:

- Implement the concept ‘international’;
- Improve the appearance of the inner-city;
- The reputation as shopping city needs to be expanded;
- Strengthen the image among consumers;
- Improve the routing;
- Focus on the fashion branch;
- Benefit the quality of the restaurants and bars in the inner-city.

In figure 5.3 The Hague’s branding strategy is visualised. At first the already mentioned main objective is stated. In order to achieve this goal three main subjects of attention are distinguished. These subjects are facilities, topics and transportation. Each of these focus areas is divided in several themes, as shown in the figure. The subject facilities for example, consists of the themes tourism and recreation, shopping, culture and events. All the different themes are connected to the concept of distinguishing sphere areas in the inner-city and are part of the city branding (Dalerup, 2008). An important part of The Hague’s branding strategy in order to become an international shopping destination, are the various retail (re)development projects in the inner-city. In 2007 shopping centre Spuimarkt was finished. This new development is located in the heard of the inner-city and connects the Grote Marktstraat with the main retail streets. The development consists of 10.050 m² retail, 4.780 m² hospitality service, 15.100 m² leisure and 450 parking spaces. Spuikwartier is a project of Ontwikkelingsmaatschappij Spuimarkt CV (BAM Vastgoed, Multi Vastgoed and ING Real Estate). During an interview with Van der Ven, developer at ING, he
said that the development process went very fast, because of the willingness of the municipality of The Hague to cooperate with the consortium Ontwikkelingsmaatschappij Spuimarkt. The development of the Spuikwartier fitted perfectly in the city’s ambition to upgrade the inner-city in order to become an international known shopping destination. Recently this shopping centre has won the yearly price of NRW (Nederlandse Raad Winkelcentra). NRW praised Spuimarkt because of the innovative concept and the professional and daring entrepreneurship of the developers.

Figure 5.3: Binnenstadsplan (The Hague, 2008)

5.3 Process

The Binnenstadsplan is implemented by Bureau Binnenstad, a consortium of the Chamber of Commerce Haaglanden, the foundation ‘Binnenstad Den Haag’ and the municipality of The Hague. Bureau Binnenstad functions as contact centre for the development of The Hague’s inner-city. This development is a joint responsibility of entrepreneurs, owners and several associations of the local government. Next to that Bureau Binnenstad initiates consultations of inhabitants and other stakeholders.

Figure 5.4 shows the central role that Bureau Binnenstad fulfils in the positioning of The Hague’s inner-city. Stichting Binnenstadsmanagement is a department of the municipality of The Hague and can be seen as the principal. On the tactic level Bureau Binnenstad functions as the intermediate between the Stichting Binnenstad and the municipality. Stichting Binnenstad looks after the interests of several stakeholders, which are BOF (Binnenstad Ondernemers Federatie), KvK (Kamer van Koophandel), RGD (Rijksgebuwendienst), VVE (Vereniging Van Eigenaren), KHN (Koninklijke Horeca Nederland) and StiBB (Stichting Bewoners Belangen Binnenstad). On the other hand the municipality has several departments which have interests in The Hague’s inner-city. These departments
are BSD (Bestuursdienst), BSO (Dienst Stedelijke Ontwikkeling), DSB (Dienst Stadsbeheer), OCW (Onderwijs Cultuur en Wetenschap) and the Police.

![Organisation scheme](image)

**Figure 5.4: Organisation scheme (The Hague, 2008)**

The activities to be undertaken every year are outlined in a yearly activity program. The participants of Bureau Binnenstad determine which actions will be taken in a specific year and who is responsible for each activity. The parties who have to undertake these activities are outlined in the operational division. This division consists of Stichting Marketing Haagse Binnenstad, Koepel Binnenstad and several project teams.

Several activities are undertaken to commit the stakeholders to the process of retail focused city branding:

- An annual report called ‘Binnenstadmonitor’ is published in order to show the stakeholders the results of the branding efforts. Presenting the outcomes awares the stakeholders of the positive effects of the city branding, and keeps them committed;
- At the moment a new policy document is being developed, called Binnenstadsplan 2010-2020. This document will be the guide for the next decade, concerning the branding of The Hague’s inner-city. Workshops are organized to get input from de several stakeholders for the development of this document;
- Every month a network drink is organised, in order to bring the stakeholders together. All the retailers and other entrepreneurs located in the inner-city are welcomed. This activity realise stakeholder involvement and implies active participation from them concerning the improvement of their inner-city.
5.4 Effectiveness

In this paragraph the applied city branding strategy will be assessed by means of discussing the retail supply variables (branch classification and vacancy rate) and the retail demand variables (consumer orientation and retail location classification). The match between the supply and demand is evaluated discussing the consumer appreciation of the retail facilities in The Hague’s inner-city. The value of the variables before the city branding was applied is compared with the value of the same variables afterwards.

5.4.1 Supply variables

Branch classification

Locatus has made a branch classification of The Hague’s inner-city retail portfolio. An overview of this classification can be found in the next figure for respectively 2004 and 2009. Figure 5.6 shows that the total number of retail units has decreased from 1,462 in 2004 to 1,436 in 2009. Figures from Locatus show that the total retail floor space has increased from approximately 182,000 m² to approximately 183,500 m² anno 2009. The decline of the number of retail units, in relation to the increased total retail floor space, implies a growth of the retail floor space per retail unit. This consideration is in line with the in the theoretical framework mentioned trend of up-scaling in Dutch inner-cities.

<table>
<thead>
<tr>
<th>Branch:</th>
<th>Daily</th>
<th>Fashion</th>
<th>Hobby</th>
<th>Home</th>
<th>Etcetra</th>
<th>Leisure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Centre</td>
<td>99</td>
<td>110</td>
<td>383</td>
<td>393</td>
<td>90</td>
<td>80</td>
</tr>
<tr>
<td>Passage</td>
<td>6</td>
<td>7</td>
<td>10</td>
<td>12</td>
<td>3</td>
<td>5</td>
</tr>
<tr>
<td>Haagse Bluf</td>
<td>2</td>
<td>4</td>
<td>13</td>
<td>19</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Drie Hoekjes</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>1</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Groenmarkt</td>
<td>-</td>
<td>6</td>
<td>2</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Spuihof</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>2</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Spuimarkt</td>
<td>-</td>
<td>4</td>
<td>-</td>
<td>6</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Hof ter Hage</td>
<td>-</td>
<td>1</td>
<td>-</td>
<td>5</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Markthof</td>
<td>9</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>1</td>
<td>-</td>
</tr>
<tr>
<td>Total</td>
<td>107</td>
<td>135</td>
<td>412</td>
<td>443</td>
<td>93</td>
<td>89</td>
</tr>
</tbody>
</table>

Figure 5.5: Branch classification 2004-2009 (Locatus, 2009)

An important aspect of The Hague’s branding strategy is the attraction of new fashion formulas. Figure 5.5 shows that the number of stores in the fashion branch has increased with 7.5% compared to 2004, to a total of 443 retail units in 2009. The category daily shows significant growth as well in the period 2004 to 2009. Many of these new retail facilities are located in Spuimarkt and Markthof. In Spuimarkt are three supermarkets situated and Markthof is the area that is turned into a China Town with Oriental supermarkets and restaurants.

Vacancy rate

The number of vacant retail units in the inner-city is derived from the Locatus figures to. Figure 5.6 shows the vacancy rate in The Hague’s inner-city. In 2004 this vacancy rate was 143 retail units and anno 2009 a number of 104 retail units is vacant. At first sight this seems to be a huge decline in vacancy, but the total number of retail units has declined as well. Taking this into account the vacancy rate still decreased from 10% in 2004 to approximately 7% in 2009.
Next to attracting more visitors The Hague has the intention to attract retailers to its inner-city. The significant decrease of the vacancy rate in the inner-city of 3% shows that this aim is being realised.

<table>
<thead>
<tr>
<th>Year</th>
<th>Total 2004</th>
<th>Total 2009</th>
<th>Vacant 2004</th>
<th>Vacant 2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>Centre</td>
<td>1395</td>
<td>1322</td>
<td>128</td>
<td>93</td>
</tr>
<tr>
<td>Passage</td>
<td>40</td>
<td>32</td>
<td>15</td>
<td>5</td>
</tr>
<tr>
<td>Haagse Bluf</td>
<td>18</td>
<td>26</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Drie Hoekjes</td>
<td>-</td>
<td>9</td>
<td>-</td>
<td>2</td>
</tr>
<tr>
<td>Groenmarkt</td>
<td>9</td>
<td>3</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Spuihof</td>
<td>-</td>
<td>7</td>
<td>-</td>
<td>2</td>
</tr>
<tr>
<td>Spuimarkt</td>
<td>-</td>
<td>18</td>
<td>-</td>
<td>2</td>
</tr>
<tr>
<td>Hof ter Hage</td>
<td>-</td>
<td>8</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Markthof</td>
<td>-</td>
<td>11</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Total</td>
<td>1462</td>
<td>1436</td>
<td>143</td>
<td>104</td>
</tr>
</tbody>
</table>

**Figure 5.6: Vacant retail units 2004-2009 (Locatus, 2009)**

5.4.2 Demand variables

Visitor numbers
In 1997 the total number of visitors of The Hague’s inner-city was 27,0 mln (Bureau Binnenstad, 2007). In 2007 this number had increased to 32,5 mln visitors. In paragraph 3.5.1 has been mentioned that the number of people that visit the inner-city has declined according to Locatus. The Hague’s city branding strategy has accomplished that this trend has not developed in its inner-city. In the covenant ‘Binnenstadsplan’ is stated that the number of visitors should grow with 15 % within 10 years. Since the actual increase of the number of visitors in the period 1997 to 2007 is over 20%, is concluded that this goal has been achieved. At the zero measurement 9,5 mln of these visitors were not residents of The Hague, in 2007 this number of non residential visitors has increased to 14,6 mln. This is an expansion of 5,1 mln visitors. Since the total number of visitors of the inner-city has increased with 5,5 mln, it is likely to assume that the new inner-city visitors concern non-residents.

Length of stay
Another aim of The Hague’s city branding strategy was to extend the length of stay of the visitors of its inner-city. According to the Binnenstadsmonitor 2007 the average length of stay has increased from 120 minutes to 151 minutes. This implies that the target to extend the visitors’ the length of stay has been reached as well.

Retail location classification
The following figures show the inner-city of The Hague in 2004 and 2009. Locatus has classified the retail units in the inner-city in terms of ‘consumer value’ as defined by Bolt. An A1 classification is defined as a retail location where over 75% of the total number of visitors passes by. The first figure shows that in 2004 only a small number of shops were passed-by by 75 % or more of the total number of visitors. These shops are located at the Spuistraat. The second picture shows that in 2009 this A1 area has grown enormously and has been spread out to the Grote Marktstraat. This implies that more visitors of the inner-city have
visited the area, as a result of the applied city branding. Important causes for this are probably the realization of the Spuimarkt and the tram tunnel. The pictures also show that the Venestraat has developed from a B1 classification (25 – 50 % of the visitors) to an A2 classification (50 – 75 % of the visitors). Anno 2009 the Paleiskwartier is attracting more visitors as well. This is considered as a result of the municipality’s promotion campaign that focuses on the different sphere areas in the inner-city.
5.4.3 Match

The last part of the assessment concerns the match between the retail supply and demand in The Hague’s inner-city. This match implies that consumers meet their requirements in the inner-city. In order to get insight in the success of this match the consumer appreciation is discussed, using the document ‘Binnenstad Buitengewoon in cijfers 2007’ This report monitors The hague’s inner-city over the year 2007. The Hague’s inner-city retail is rewarded with an average of 7,5 by both inhabitants and visitors. In 2004 the retail facilities were rewarded with an average of 7,3 by both parties. The consumer appreciation has increased slightly anno 2007, which implies that the consumers of The Hague’s inner-city meet their requirements better than in 2004. Ten years before, in 1997, the city was rewarded with an average of 6,8. Especially the aspect atmosphere gets much more credits anno 2007. Also the diversity of the present retail and particularly the weekly Sunday sales score well. Since the match between retail demand and supply has improved, is concluded that the applied city branding has a positive effect on the balance of demand and supply.

5.5 Conclusion

In this chapter The Hague’s city branding strategy was outlined, to get insight in the positioning of its inner-city as a shopping destination. Using the outcomes of this case study, a first attempt is made to answer the last two research questions, stated in paragraph 2.4. Below these two research questions are answered, in the context of the case The Hague.

How is retail focused city branding being applied in The Hague?

The Hague is positioned as ‘International city of Peace and Justice’. Its inner-city is positioned as an international shopping destination, with a wide range of high-end retail facilities. The inner-city brand is an international high-end shopping destination with allure. The Hague is proud to offer the largest number of high-end stores in the Netherlands of which several unique international fashion brands. The inner-city has many different faces, since several retail clusters can be distinguished. Each retail cluster has its own unique atmosphere and The Hague uses this to position its city, by promoting the presence of the different sphere areas. Important aspects of the city branding strategy are:

- Implementing the concept ‘international’;
- Improving the inner-city’s appearance;
- Expanding the reputation of a shopping destination;
- Strengthening the image among consumers;
- Improve the routing;
- Focusing on the fashion branch;
- Benefitting the presence of restaurants and bars.

The Hague’s inner-city is positioned by a consortium of the Chamber of Commerce Haaglanden, the foundation ‘Binnenstad Den Haag’. The consortium manages the city branding and commits the inner-city retailers. The annual monitoring of the branding results, active involvement of stakeholdes in the development of the branding strategy and the organisation of networking events results in large commitment of the stakeholders.

How effective is the applied retail focused city branding?
Most of the aimed results of the applied branding strategy have been achieved. The attractiveness of the inner-city increased, which resulted in an increase of the number of visitors of 20% in ten years. Therefore is concluded that the strategy enables The Hague’s inner-city to counter-pressure the trend of decreasing numbers of visitors in Dutch inner-cities. Next to that the strategy realised an increase in the consumers’ average length of stay in the inner-city with 30 minutes to an average of 151 minutes. The inner-city’s rewarding by both visitors and inhabitants has increased as well. The city branding concept ‘International’ with the key aspect segregation of different sphere areas resulted in a more diverse shopping atmosphere. Due to the applied promotion activities visitors are able to find the different shops in each sphere area. As a result consumer flows in the inner-city have strengthened and retailers are more eager to choose for The Hague in order to settle down.
Almere

Clever city branding or just good luck?
6.1 Introduction

Almere’s city brand is ‘Het kan in Almere’, which stands for ‘Everything is possible in Almere’. The inner-city is, just like the rest of the city, still relatively young. Therefore it is characterised by contemporary architecture. With the recent extension of the inner-city a statement is made, by the development of an hyper modern retail area. The award-winning masterplan, designed by Koolhaas, provided the inner-city a state of the art new retail area. And that is exactly how the inner-city is being branded currently; a state of the art shopping destination with a wide range of retail facilities.

6.1.1 Attractiveness of the inner-city

Almere does not have an historical inner-city, but is featured by contemporary architecture. Due to the lack of historical/famous buildings the city does not have a characteristic atmosphere. The big sizes of both buildings and public space imply that many consider the city as anonymous. The pictures on the previous page provide an impression of the large scale of the retail facilities. In the inner-city are mainly retail stores located at the ground flour of the buildings. In the recently developed part of the retail area dwellings are situated above the commercial spaces. Most of the dwellings have small windows in front and a balcony situated at the back, which strengthens the previously mentioned anonimous atmosphere. There are several hospitality facilities in the inner-city, mainly lunch rooms and fast-food enterprises. Office buildings, used by both public and private parties are located around the shopping area. The level of mixed functioning in the inner-city is considered to be limited.

The inner-city hosts approximately 550 retailers. Present warehouses are C&A and V&D and anchor retailers in the shopping centre are H&M and Zara. Many of the retail formulas are franchised and the number of local entrepreneurship is relatively small compared to other cities. Due to the large number of chain retail facilities, the retail mix is not optimal in terms of quality and variety. A result many of Almere’s inhabitants go to other cities for recreational shopping. The fourth factor that determines the attractiveness is the present liveliness. Due to the size of scale there are many open spaces in the inner-city. Especially during the week and in the evening the shopping steets are not vibrant, due to the small concentration of shopping people.

6.1.1 Interest in city branding

Almere is a medium large city at the moment, but has the ambition to become the fifth city in the Netherlands. In 2007 the Almere had 181.000 inhabitants, but this number is increasing rapidly. Currently two new suburbs are developed: Almere Poort will have over 16.000 inhabitants in 2010 and Almere Hout will have approximately 2.400 inhabitants by than. Next to that there is still a substantial growth of the number of inhabitants in the other suburbs. This implies that Almere will have 205.000 inhabitants in 2010 (Strabo, 2008). The city has the ambition to grow to a number of inhabitants of 350.000 in 2030.
Due to Almere’s ambitious growth strategy the demand to retail facilities has increased enormously during the last few years, and is expected to increase much more in the near future. In the period 2003-2007 the outdated inner-city of Almere has been redeveloped, to meet these (future) retail requirements. The retail floor space has been more than doubled; it has increased from 37,000 m² to 82,000 m².

Since Almere is still a relatively young city it has a strong need to position itself. The city does not have an historical inner-city and therefore many visitors consider that the atmosphere in this area is less attractive than in competitive cities. Many inhabitants do their daily shopping in Almere and for fun shopping they go to Amsterdam. Since the retail portfolio is already prepared for the enormous population growth in the coming years, there is currently a lack of purchase power in the surroundings. So the inner-city needs to be promoted actively to enhance this purchase power and to attract extra visitors.

6.2 Branding

The extension of the inner-city should help Almere to become a shopping city (Almere, 2004). Marketing and promotion is needed to attract customers and to make investors aware of the possibilities the city has to offer. The private parties (retails) have a key role, especially the retailer associations and the municipality will provide the needed support. In the policy document ‘Detailhandel in Almere’ (Almere, 2004) the municipality outlined her strategy concerning the future development of the several retail areas in Almere. The ambition is to create a complete and attractive supply of shopping areas. The document is drawn up for the period 2004-2010 so the formulated ambitions should be realised by now.

In order to drawing up the retail policy document Ecorys conducted a research for the municipality, concerning the supply, functioning and plans for extension till 2010. Ecorys concluded the following weaknesses concerning the retail in Almere:

- Shortage of space (quantitative);
- Lack of supply in the branch non-daily products, especially in the higher segment;
- Shortage of retail units for starters and interdependent retailers;
- No B2- and C-locations (using Locatus’ location segmentation definitions);
- No pleasant atmosphere in the retail area and problems with social safety.

The city branding strategy is based on the intention to upgrade these aspects. Almere has the ambition to transform from a ‘purchase city’ into a ‘shopping city’. Concerning the extension of Almere’s inner-city, from 37,400 m² to over 93,000 m², the main focus is on:

- Retail supply: quality and diversity, extension mainly in the higher segment, special retail formulas and interdependent retails;
- Movements of the old inner-city shopping area to the newly developed area, finding new retailers for the empty shops;
- Creating B2- and C-locations (using Locatus’ location segmentation definitions);
- Arrangement of the public space, concerning sphere and atmosphere;
- Accessibility.
As mentioned previously Almere has the ambition to grow to a city with 350,000 inhabitants in 2030, which implies the number of inhabitants will be doubled compared to 2007. At the moment over 40,000 inhabitants leave Almere every day to go to work elsewhere. Almere has the ambition to provide these commuters the opportunity to work in their own city (ACM, 2007). The following mission statement was developed: ‘The enhancement of the preference of the city Almere among selected focus groups to do business, to live and to recreate, by means of both promotion and product development, in cooperation with both public and private parties’ (Almere, 2009). This mission statement shows that Almere mainly focuses on creating a working environment, instead of a shopping environment. In the annual report of 2007 on the other hand, is stated that currently the main activity of people in Almere is shopping (63%) and not the desired ‘doing business’. Next to that the city now realises that the most important reason visitors come to Almere is to go shopping as well. The recently extended inner-city is being used to improve Almere’s image. Using the modern architecture and the attraction of new retail formulas in the higher segment, Almere wants to attract customer groups with more purchase power.

6.3 Process

In the policy document ‘Detailhandel in Almere’ is mentioned that continues marketing by the retailers is essential, using professional and properly to the retail area adapted marketing plans. Next to that the municipality is aware of the urge to promote new developments in the existing retail area, to make both inhabitants and investors aware of the retail facilities and other possibilities in the inner-city. The private parties, and especially the retailer associations, should fulfil a key role in the marketing of their inner-city. Other parties like the inner-city management department of the municipality and Almere City Marketing (ACM) could help as well. ACM is part of the municipality of Almere and the main objective of this association is ‘to stimulate the preference for Almere’. As stated in the previous paragraph already, ACM currently focuses on attracting companies.

The branding of Almere’s inner-city as a shopping destination is mainly taken care of by the in this area present retailers and other stakeholders, since the municipality’s inner-city management department is not involved with the branding of the inner-city either (Vermeulen, 2009). In 2006 the association Stadshart Almere has been initiated (Stuurgroep Stadshart). This association has the following members:

- Ondernemers Vereniging Stadshart Almere (OVSA), which is the association for the retailers in the inner-city;
- Horeca Grote Markt (HGM), which members are involved in the hospitality service industry located in the inner-city;
- Belangen Vereniging van Eigenaren (BE), which are the owners of the retail property in the inner-city (investors Unibail-Rodamco and Corio);
- Centrummanagement Almere, which is the department of the municipality of Almere which is concerned with the daily management of the inner-city.

Mission statement of Stuurgroep Stadshart is ‘Success with Stadshart Almere’. In an interview with the director of OVSA, mr. Ort, he explained that the association Stadshart Almere takes care of several teams, concerning marketing,
safety, parking facilities/accessibility (P&B) and clean/intact/attractive (SHA). The organisation structure of these teams is shown below.

![Organisation structure](image)

Figure 6.1: Organisation structure (Ort, 2008)

The current organisation of the positioning of the inner-city does not satisfy Stuurgroep Stadshart. There is no synergy between the activities of the Stuurgroep and ACM, since they do not cooperate (Ort, 2008). Once both parties even organised a large event in the inner-city on the same day without knowing this from each other. Since visitors could not go to both of the events at the same time, the desired numbers of visitors were not reached. Another disadvantage of the decentralised city branding structure is that each stakeholder needs to pay a lot of marketing costs. If they would promote the inner-city (events) together, these costs could be shared. Due to these conflicts between ACM and Stuurgroep Stadshart, it is hard to keep the stakeholders committed. They have the feeling that their efforts do not result in the desired results.

6.4 Effectiveness

In this paragraph the applied city branding strategy will be assessed by means of discussing the retail supply variables (branch classification and vacancy rate) and the retail demand variables (consumer orientation and retail location classification). The match between the supply and demand is evaluated discussing the consumer appreciation of the retail facilities in Almere’s inner-city. The value of the variables before the city branding was applied is compared with the value of the same variables afterwards.

6.4.1 Supply variables

**Branch classification**

Locatus has set up a branch classification of Almere’s inner-city retail portfolio. An overview of this classification can be found in the next figure for respectively 2004 and 2009. Figure 6.4 shows that the total number of retail units has increased from 383 in 2004 to 548 in 2009. This increase is due to the recent retail developments, the figure shows that the development of Almere Stadshart has added 155 retail units to the inner-city. In the ‘old’ centre 70 retail units have disappeared. In Almere Stadshart many fashion stores have opened, therefore the total number of fashion related retail has increased from 81 in 2004 to 154 in 2009. It is remarkable that the number of leisure facilities has
decreased with a number of 10 in the period 2004 to 2009. A lot of leisure in Almere Centre and Almere adjacent has disappeared. Especially this branch seems to suffer from the lack of visitors in the inner-city. In the end of 2008 for example Nike had to close its experience store in Almere Stadshart, due to lack of customers. The figure shows that the number of retailers in the branch Home & Interior has doubled.

<table>
<thead>
<tr>
<th>Year</th>
<th>Daily</th>
<th>Fashion</th>
<th>Hobby</th>
<th>Home</th>
<th>Etcetra</th>
<th>Leisure</th>
</tr>
</thead>
<tbody>
<tr>
<td>2004</td>
<td>35</td>
<td>4</td>
<td>66</td>
<td>57</td>
<td>18</td>
<td>5</td>
</tr>
<tr>
<td>2009</td>
<td>4</td>
<td>4</td>
<td>28</td>
<td>26</td>
<td>17</td>
<td>4</td>
</tr>
</tbody>
</table>

Figure 6.2: Branch classification 2004-2009 (Locatus, 2009)

**Vacancy rate**

In Almere Stadshart 9 retail units are not occupied yet. Due to movements from retailers from the old to the new part of the inner-city the vacancy rate has increased in both Almere Centrum and the adjacent centre. In total there are 22 vacant retail units now, compared to 2 units in 2004. 2 out of 383 retail units in total imply a vacancy rate of 0,5% in 2004, which is very low. Anno 2009 the vacancy rate has increased to 4%, which is still less than in other Dutch cities. Nevertheless it is obvious that the extension of the inner-city implied a strong rise of the vacancy rate.

<table>
<thead>
<tr>
<th>Year</th>
<th>Total</th>
<th>Vacant</th>
</tr>
</thead>
<tbody>
<tr>
<td>2004</td>
<td>180</td>
<td>1</td>
</tr>
<tr>
<td>2009</td>
<td>110</td>
<td>5</td>
</tr>
</tbody>
</table>

Figure 6.3: Vacant shops 2004-2009 (Locatus, 2009)

**6.4.2 Demand variables**

**Visitor numbers**

In 2005 the number of visitors of the inner-city of Almere was 295.450 per week (Strabo, 2008). At the end of 2007 this number had increased to 352.390 visitors per week. Looking at the number of visitors per annum, an increase from approximately 15 mln visitors in 2005 to over 18 mln visitors in 2007 is noticed. In 2005 the total of retail space was 37.400 m² and due to the development of Stadshart Almere this retail space has grown to 93.000 m². This implies that in 2005 the number of visitors per square meter of retail space was approximately 400 while anno 2007 this ratio was 194 potential customers per square meter retail space. At first sight the increase of 3 mln visitors within two years seems substantial, but since the retail space was doubled the number of visitors in relation to the present retail shows a huge decline. The positionig of Almere's inner-city does not have the desired effect.
Strabo’s research also shows that in 2005 approximately 67% of the total number of visitors was a resident of ‘Almere Stad’. Next to that 15% of the visitors were living in Almere buiten and 10% came from Almere Haven. Only 8% of the visitors of Almere’s inner-city were non residents. Anno November 2007 the percentage of visitors from Almere Stad had increased with 1%, 11% came from Almere buiten and 11% came from Almere Haven. Therefore the total number of visitors from outside Almere increased with 2% to 10%. Although Almere has doubled his inner-city retail portfolio, it still mainly serves local customers.

**Length of stay**

In 2005 the average length of stay of the inner-city was 64 minutes. In 2007 the length of stay had decreased to an average of 62 minutes. According to Strabo this is 10 minutes more than in average inner-cities. This can be explained by the fact that the inner-city is characterised by a stretched-out structure. It is remarkable that the average length of stay of visitors of the inner-city has stayed constant, despite of the development of Stadshart Almere.

**Retail location classification**

![Retail location classification 2004-2009 (Locatus, 2009)](image)

Figure 6.4: Retail location classification 2004-2009 (Locatus, 2009)
Figure 6.4 shows the inner-city of Almere in 2004 and 2009. Locatus has classified the retail units in the inner-city in terms of ‘consumer value’ as defined by Bolt. The first figure shows that in 2004 the A1 shopping area was mainly located at the Stationsstraat. The area where between 50 and 75 % of the visitors of the inner-city passed was concentrated around the Korte Promenade by than. The second picture shows the zoning of these retail classification areas anno 2009. The A1 area has moved to the south of the inner-city, due to the development of the new Stadshart. Several retailers have moved from the old part to the new part, like Hema and C&A and important anchor retail formulas like for example Zara have taken the opportunity to open a store in the new part of the inner-city. As a result the consumer flows have shifted towards the new Stadshart. The second figure shows the enormous amount of new retail space that was added since 2004. This area got the A2 classification immediately.

Almere had the ambition to realise more B2- and C-locations in its inner-city. The rents are lower at these retail locations and this provides opportunities for interdependent retailers to settle down in the inner-city. Anno 2009 the number of C-locations (where only 5 to 10% of the total number of visitors passes-by) has increased indeed, as a result of movements from franchise formulas to the new Stadshart. The number of locations with a B2 classification shows a decrease, which is due to the spread of anchor stores through the entire inner-city. Anno 2009 there is a gap between the prime retail locations and C-locations so the inner-city still does not offer opportunities for all retailers.

6.4.3 Match

The last part of the assessment concerns the match between the retail demand and supply in Almere’s inner-city. This match implies that consumers meet their requirements in the inner-city. In order to get insight in the success of this match the consumer appreciation is discussed, using the report ‘Passantenonderzoek Stadshart en koopstromenonderzoek Almere’ (Strabo, 2008). According to this report 67% of 381 interviewed visitors of Almere’s inner-city is judges present atmosphere as positive. Approximately 27% is not pleased with the atmosphere and 5% considers it as bad. Most complaints concern the lack of sphere and cosiness and the inner-city not being vibrant enough. With regard to 2005 is concluded that the general judgement has increased, since only 57% of the visitors was satisfied with the atmosphere by than. But the atmosphere is still, just like in 2005, the worst rewarded aspect. Other aspects concern the accessibility, present parking facilities, social safety, maintenance and cleaning. All together the inner-city is well rewarded by 87% of the total number of visitors in 2007, compared to approximately 77% in 2005. Since the match between retail demand and supply has improved slightly, is concluded that the applied city branding has little positive effect on the balance of demand and supply.

6.5 Conclusion

In this chapter Almere’s city branding strategy was outlined, to get insight in the positioning of its inner-city as a shopping destination. Using the outcomes of this case study, a first attempt is made to answer the last two research questions, stated in paragraph 2.4. Below these two research questions are answered, in the context of the case Almere.
How is retail focused city branding being applied in Almere?

Almere’s inner-city is still relatively young and therefore characterised by contemporary architecture. The lack of benefiting from an attractive historical inner-city is now turned into a unique selling point. With the recent extension of the inner-city a statement is made, by the development of a hyper modern award-winning retail area. The inner-city is positioned as a state of the art shopping destination with a wide range of retail facilities. Almere has the aim to turn from a ‘purchase city’ into a ‘shopping city’. Important aspects of the city branding strategy are:

- Realising a high-quality and diverse retail supply;
- Movements from the old shopping area to the newly developed area
- Creating B2 and C locations (using Locatus’ location segmentation definitions);
- Arrangement of the public space, concerning sphere and atmosphere;
- Good accessibility.

Two different parties are involved in the inner-city branding; a municipality department and a consortium of retailers and property owners. Since these two parties do not cooperate no synergy is realised among their activities. Due to conflicts between the parties it is hard to keep the stakeholders committed.

How effective is the applied retail focused city branding?

Most of the aimed results of the applied branding strategy have not been achieved yet. The attractiveness of the inner-city increased due to the development of the Stadshart, but this resulted in an increased vacancy rate in the existing retail area with 3% and a vacancy rate of 6% in the new part. An increase in visitor numbers was recorded in the period 2005-2007 from 15 to 18 mln. Since the retail floor space has doubled in this period is stated that the absolute visitor number has decreased. Therefore is concluded that the city branding strategy has not succeeded in attracting more visitors. Another aspect of the positioning is the attraction of interdependent retailers in order to create a high-end retail supply. Since visitors still think that there are too little specialised retail facilities in Almere’s inner-city, is concluded that the applied retail focused city branding strategy does not have the desired effect to Almere’s image as a shopping destination.
7 Roermond
7.1 Introduction

Roermond is positioned as ‘Roermond, that’s all you need’. This city brand implies the mix of the present cultural facilities, aquatic sports facilities (Maasplassen), nature facilities (National park Meinweg) and off course the large number of retail facilities. Roermond offers a wide range of shopping opportunities, varying from the retail in the historical inner-city to a designer outlet centre and retail park. Roermond is being positioned as a shopping destination that meets everyone’s requirements. Figure 7.1 shows the present retail clusters inner-city, Designer Outlet Centre (DOC), the recent developed Retail park and the Huis- and Tuinboulevard (a retail cluster focused on the DIY and garden supply consumer goods).

7.1.1 Attractiveness of the inner-city

Roermond is characterised by a compact, monumental inner-city with a lot of atmosphere. The centre is mainly used as a shopping area. Since many leisure facilities are located in the inner-city the area has a large entertainment factor for recreational shoppers. Also the bars and restaurants at the two squares, Munsterplein and Grote Markt, offer a lot of entertainment. The number of companies in the inner-city is relatively small. Another feature of an attractive inner-city is the mix of retail facilities. Next to the common chain retailers a wide range of interdependent retailers is located present, which provides the inner-city a strong city brand. Since the streets are small and busy the inner-city looks quite crowded, which contributes to a vibrant inner-city. The synergy with the other retail clusters is another unique selling point of Roermond’s inner-city. This is outlined in the next paragraph.
7.1.2 Interest in city branding

Due to the loss of many companies involved in both heavy and light industry in the end of the 90’s, Roermond needed a new ‘core business’. The municipality decided to make retail this new driver, and developed a strategy to put Roermond on the map as a shopping destination. In 1998 a new alderman (Mr. Van Rey) started, who had the objective to strengthen Roermond’s position. His three targets were:

- Putting Roermond on the map as a shopping destination;
- Improve the bad parts in the city;
- Create employment.

Anno 2009 Roermond is a famous city to go shopping, especially for people from the south of the Netherlands and across the German border. As mentioned previously, this is partly due to the opening of the Designer Outlet Centre (DOC) McArthurGlen in 2001. This shopping centre has more than 120 different shops and has almost 3 million visitors per year. It is one of the biggest tourist attractions in the Netherlands. This Outlet centre is connected to the city centre of Roermond by a tunnel, and research has revealed that 40% of all the visitors of the DOC visit the inner-city as well. This implies that the opening of the Designer Outlet centre has increased the popularity of the city Roermond; it has affected the city’s image. The following figure shows a map with the several retail clusters in Roermond.

Recently a new high-way (A73) has been finalised that provides new opportunities to the city in terms of attracting consumers. Next to that the German high-way BAB 52 offers the city a potential number of consumers of 20 mln, within a 1, 5 hour traveling distance. This implies that Roermond has an enormous catchments area. In the following figure this catchments area is visualised.
7.2 Branding

Aim of the city branding strategy called ‘Roermond, that’s all you need’ is to strengthen the city’s position in order to increase the visitor flow, expenditures and city image. The city branding is applied in order to ‘obtain a plain and unambiguous positioning which is direct, uncomplicated, recognisable and international’ (Roermond, 2009). Roermond has the ambition to strengthen its position as shopping destination. In several memorandums (POL, Midden-Limburg op weg naar 2030, Masterplan Toerisme) this task is outlined. The dynamic character of the retail sector (on both the demand and the supply market) is seen as a reason to obtain a pro-active mentality. The municipality aspires an optimal bonding of purchase power of its inhabitants and an increase of visitors from outside. Roermond aims to offer its customers a complementary package of retail facilities to satisfy both fun and run shoppers. The municipality is very open-minded about private enterprises, if these initiatives support their ambitions. A condition according to these initiatives is that they do not cause ‘durable disruption’ of the retail structure. Important aspects of the positioning of the inner-city are:

- A wide range of specialised shops, run by interdependent retailers;
- A recognisable and distinguishing shopping area (atmosphere, squares with leisure facilities, monumental buildings);
- Good accessibility by car and public transport;
- A free touring car connects the retail clusters on Saturdays.

7.3 Process

In 2000 Stichting Citymanagement Roermond was founded, to stimulate the economic development and the quality of life in Roermond’s inner-city. Several stakeholders have got together and a city manager has been employed. The organisation structure is presented in figure 7.4. The board of this foundation consists of several stakeholders in the inner-city:

- Independent chairman;
- Deputy of the municipality of Roermond;
- Stichting Roermondse Ondernemers (SRO): a foundation that represents the in the inner-city present retailers;
- Represent of the retailers at the Huis & Tuinboulevard, who is a member of the Raad van Nederlandse Detailhandel (RND) [Dutch council of retail];
- Represent of the real estate owners in the inner-city, member of the Vereniging van Vastgoedeigenaren (VV) [association of real estate owners];
- Director of the McArthurGlen Designer Outlet Centre (DOC);
- Represent of the Retail Park, who is a member of Koninklijke Horeca Nederland (KHN) [Dutch catering industry association].

These stakeholders outline the policy of Stichting Citymanagement Roermond and participate financially in the branding of the city. Next to that the board is a platform for urban developments in Roermond. The foundation is concerned with:
- City branding: the development of the logo and slogan ‘Roermond, that’s all you need’ and the attending of the Provada (a national real estate fair);
- Event coordination: the management of events in Roermond;
- City partners: the organisation of workshops in order to get input from the stakeholders concerning the strategic positioning of Roermond. Next to that possibilities are investigated to set up a fund in which entrepreneurs should participate financially, on voluntary basis;
- Service point: The set-up of a service desk for the retail and hospitality service industry, to help them to solve business issues;
- Management: The optimisation of the Citymanagement organisation and the set-up of a database with relevant information of entrepreneurs and visitors in Roermond.

Currently Citymanagement Roermond has some difficulties in committing the inner-city retailers to the city branding. Since many of them are interdependent, they are not willing to support the city branding financially. They think they can benefit from the benefits of the promotion activities of Retail Park and the DOC, which make a lot of marketing efforts. In order to commit the inner-city retailers to the branding of Roermond, the previously mentioned association City Partners has been initiated recently. Unfortunately there are no results of this initiative yet.

### Effectiveness

In this paragraph the applied city branding strategy is assessed by means of discussing the retail supply variables (branch classification and vacancy rate) and the retail demand variables (consumer orientation and retail location classification). Next to the in the inner-city present retail the DOC is taken into account as well, since this retail cluster largely impacts the inner-city. Since the Retail Park opened just last year, no information concerning the impact of this periphery retail area on the inner-city is available yet unfortunately. The match between the supply and demand is evaluated discussing the consumer appreciation of the retail facilities in Roermond’s inner-city The value of the variables before the city branding was applied is compared with the value of the same variables afterwards.
7.4.1 Supply variables

**Branch classification**

Locatus has made a branch classification of Roermond’s inner-city retail portfolio. An overview of this classification can be found in the figure 7.4 for respectively 2004 and 2009. This figure shows that the total number of sales units has increased from 784 in 2004 to 798 anno 2009. The Roercenter was finished at the end of 2003 and was therefore partly taken into account by Locatus in 2004. The Kloosterwand has extended with 11 new shops in the period 2004-2009. The figure shows that the branch classification stayed pretty much constant during the last five years. A little decrease of the number of stores in the fashion branch is recorded, from 176 to 156 stores. This decline is probably due to the present fashion retail in the DOC. Taking into account that the DOC hosts approximately 100 fashion stores can be concluded that the fashion branch in the inner-city stayed remarkably strong.

![Figure 7.4: Branch classification 2004-2009 (Locatus, 2009)](image)

**Vacancy rate**

Just like the branch arrangement the vacancy rate in the inner-city of Roermond has stayed pretty much constant. In 2004 there were 53 vacant retail units recorded and anno 2009 there are 55 vacant units. Placing this in relation to the total number of retail units, is concluded that the vacancy rate stayed constant at approximately 6.8%. The addition of a large number of retail units in the DOC does not seem to affect the number of stores in the inner-city.

![Figure 7.5: Vacant shops 2004-2009 (Locatus, 2009)](image)

7.4.2 Demand variables

**Visitor numbers**
There are no figures available concerning the exact numbers of visitors of Roermond’s inner-city. The Designer Outlet Centre has measured its number of visitors on an annual basis. In 2002 the number of visitors was approximately 2 mln per year and in 2008 this number had grown to 2.9 mln visitors (Bauwens, 2008). This is an increase of 45% in 6 years. Probably the increase of the number of visitors in the inner-city of Roermond is much lower. But since a lot of visitors of the DOC visit the inner-city as well, the number of visitors in the inner-city is assumed to have increased in the last 6 years to.

**Retail location classification**

![Map of retail location classification 2004 and 2009](image)

**Figure 7.6: Retail location classification 2004-2009 (Locatus, 2009)**

Legend:
- A1
- B1
- B2
- C
- nvt
Figure 7.6 illustrates the inner-city of Roermond in 2004 and 2009. Locatus has classified the retail units in the inner-city in terms of ‘consumer value’ as defined by Bolt. The first figure shows that in 2004 a lot of retail locations in the inner-city were classified as B2; 10 to 25% of the total number of customers in the inner-city passes by these shops. Anno 2009 this area has been upgraded to a B1 classification, where 25 to 50% of the consumers pass by. This is due to the development of the Roercenter. Many visitors park their car in the parking garage which is located under this shopping centre, and enter the inner-city from the east side. The Roercenter itself has obtained an A2 classification.

The tunnel to the Designer Outlet Centre, has made the northern part of Roermond’s inner-city more attractive to retails. In the DOC is just a small number of restaurant facilities allowed and their opening hours need to be adjusted to the opening hours of the DOC. Therefore just a couple of lunch rooms and a MacDonald’s are located in the DOC. The tunnel to the inner-city makes it interesting for bars and restaurants to settle down at the market square, since here are no requirements to opening hours. Next to that the Sunday sales at the DOC provides retailers which want to open on Sundays to opportunities in terms of consumer flows, when the settle down in the surroundings of the ‘Markt’. Due to the visitors from the DOC that go to the market, this area got an A1 retail location classification.

7.4.3 Match

The last part of the assessment concerns the match between the retail supply and demand in Roermond’s inner-city. This match implies that consumers meet their requirements in the inner-city. In order to get insight in the success of this match the consumer appreciation is discussed. According to research conducted by Bothmer the attractiveness of Roermond as a shopping destination, was rewarded with an average of 7,1 in 2006. International visitors, from Belgium and Germany reward Roermond with an 8,3 respectively 8,1. So the inner-city is much more appreciated by international customers than the Dutch ones. It is remarkable that the inhabitants of Roermond mark their city with an average of 6,5. This is mainly due to the factor parking costs, which is appreciated with a just a 4,5. Unfortunately there are no recent figures concerning the consumer appreciation. Therefore it is not possible to compare the average rewarding in 2006 with a more recent one, in order to determine the match between retail demand and supply has changed due to the applied retail focused city branding.

7.5 Conclusion

In this chapter Roermond’s city branding strategy was outlined, to get insight in the positioning of its inner-city as a shopping destination. Using the outcomes of this case study, a first attempt is made to answer the last two research questions, stated in paragraph 2.4. Below these two research questions are answered, in the context of the case Roermond.

How is retail focused city branding being applied in Roermond?

Roermond is positioned as ‘Roermond, that’s all you need’. This city brand implies the mix the in Roermond present facilities and refers to the wide range of shopping opportunities the city offers. Roermond is being positioned as a shopping destination that meets every one’s requirements; with a historical
inner-city, Designer Outlet Centre (DOC), the recent developed Retail park and the Huis- and Tuinboulevard (a retail cluster focused on the DIY and garden supply consumer goods). The municipality aspires an optimal bonding of purchase power of its inhabitants and an increase of visitors from outside. Important aspects of the positioning of Roermond’s inner-city are:

- A wide range of specialised shops, from interdependent retailers;
- A recognisable and distinguishing shopping area (atmosphere, squares with leisure facilities, monumental buildings);
- Good accessibility by car and public transport;
- A free touring car connects the retail clusters on Saturdays.

Roermond’s inner-city is positioned by a foundation, which members are the several stakeholders of the inner-city. These stakeholders outline the policy and participate financially in the city branding. It turns out to be hard to commit the inner-city retailers financially, since they think they can benefit from the promotion activities the DOC and Retail Park enough.

How effective is the applied retail focused city branding?

The aim of the city branding strategy is to increase the number of visitors. Unfortunately no figures concerning the exact visitor number of the Roermond’s inner-city. The number of visitors of the DOC has increased with 45% to almost 3 mln, during the last 6 years. Since 40% of these customers visits the inner-city as well, is assumed that the visitor number of the city centre has increased as well. Therefore is concluded that the applied retail focused city branding strategy has a positive effect on the number of visitors. Next the case study revealed that the strategy enhances the inner-city a strong position, since the retail supply does not suffer from the newly retail enterprises in the periphery.
8 Cross-case-analysis

The outcomes of the case studies of the city branding applied in The Hague, Almere and Roermond are compared in this chapter. Each of the inner-cities is positioned in a different way so the cross-case-analysis provides an overview of the differences and similarities between the three city branding strategies. At first the inner-cities themselves are compared and the interest of each city in branding. Next the three different retail focused city branding strategies are collated. The branding processes and the involvement of the stakeholders are compared as well. In order to find out which combination of strategy and organisation is the most effective, the results of the positioning of each of the inner-cities are compared. The outcomes of this analysis are used to answer the research questions in the next chapter and help to determine the do’s and don’ts of retail focused city branding.

8.1 Introduction

At first the city brand, interest in city branding and attractiveness of each of the three cities are compared.

<table>
<thead>
<tr>
<th></th>
<th>The Hague</th>
<th>Almere</th>
<th>Roermond</th>
</tr>
</thead>
<tbody>
<tr>
<td>Statistics</td>
<td>- 475,580 inhabitants</td>
<td>- 184,420 inhabitants</td>
<td>- 54,610 inhabitants</td>
</tr>
<tr>
<td></td>
<td>- 1,436 retail units in inner-city</td>
<td>- 548 retail units in inner-city</td>
<td>- 798 retail units in inner-city</td>
</tr>
<tr>
<td>City brand</td>
<td>City: The Hague, International city of Peace and Justice. Inner-city: International shopping destination with high-end retail</td>
<td>City: Het kán in Almere. Inner-city: Stadshart Almere; State of the art inner-city with perfect accessibility</td>
<td>City: Roermond; That’s all you need. Inner-city: Complete offer of retail facilities, with perfect accessibility</td>
</tr>
<tr>
<td>Interest in city branding</td>
<td>Increase the attractiveness in order to improve the economically functioning of the inner-city</td>
<td>Attract visitors and make investors aware of the possibilities the inner-city has to offer</td>
<td>Position the city as a shopping destination, in order to attract extra visitors from outside</td>
</tr>
<tr>
<td>Attractiveness of the inner-city</td>
<td>The diversity in shopping areas provides the inner-city a unique atmosphere, pleasant function mix involves a vibrant inner-city</td>
<td>An anonymous inner-city with lack of lack of liveliness in the shopping area and just a limited mix of functions</td>
<td>Monumental inner-city with many specialised shops. The attractiveness is increased by the different nearby retail clusters</td>
</tr>
</tbody>
</table>

Figure 8.1: Comparison of the inner-cities
The ratio retail units / inhabitants provides information concerning the number of shops in the inner-cities of the case studies, in relation to the size of the specific cities. For both The Hague and Almere this ratio is 0,003 which imply there is one retail unit available per 330 inhabitants. In Roermond this ratio is much higher; 0,014. This means that in this inner-city more shops are present, in relation to the number of inhabitants. In other words, in Roermond is one retail unit available per 68 inhabitants. Therefore the retail unit density is 4,86 times as big as in the other two cities.

Looking at the interest in the three cities’ city branding, it is all about attracting extra visitors. Each of the cities wants to make potential customers from outside aware of the retail facilities their inner-city has to offer. The Hague goes a step further, since this city wants to become a wider known shopping destination in order to create a better functioning inner-city. The functioning of the present retail is assumed to affect the other present functions positively, like the settlement of new companies and the hotel business.

In the Netherlands an inner-city is generally considered as attractive in case it has an historic and vibrant inner-city. Both The Hague and Roermond have a traditionally outlined centre with shopping streets situated in the surroundings of the main squares with leisure facilities. Almere does not have this luxury and has contemporary architecture to offer instead. In The Hague a mix of different functions is found in the inner-city (companies, public services and hotels) while in the other two cities the present retail has kind of a monopoly position. In Roermond this does not seem to be a problem at all since the general rewarding by its customers is well, but Almere is considered to be anonymous and invariant. This implies that the presence of an historic inner-city seems to be more important to the level of a city’s attractiveness than the existence of several functions in the inner-city.

8.2 Branding

While the three cities have quite similar interests in city branding their retail focused city branding strategies vary, as presented in figure 8.2. The Hague firstly, came up with a concept (international) and fits all the property (re)developments and undertaken activities in the inner-city to this concept, in order to create the city image of an international shopping destination. This strategy has been applied for ten years now and the desired shopping image is getting pretty obvious. Almere on the other hand does not apply one single strategy but undertakes several actions in order to attract extra visitors. The award-winning inner-city is not performing as supposed though, since it does not have one single image. The present stakeholders try to apply their own image to the city which does not have the desired effect, since the inner-city does not attract the aimed number of visitors.

Roermond uses the slogan ‘All you need’ which expresses the city branding strategy pretty well. There is no specific focus in creating the city’s image; it is all about putting Roermond on the map as a place to go shopping. Since all the undertaken activities are aligned, there is still a lot of synergy among them. The Hague and Roermond have aligned city branding strategies, which create one single and therefore strong city image. In the case Almere is no plain brand realised for the inner-city.
### Figure 8.2: Comparison of the city branding strategies

<table>
<thead>
<tr>
<th>Strategy</th>
<th>The Hague</th>
<th>Almere</th>
<th>Roermond</th>
</tr>
</thead>
<tbody>
<tr>
<td>Emphasise of the different sphere areas, (re)development of several key retail projects and the implementation of the concept ‘international’ by attracting international retail formulas</td>
<td>Extension of the inner-city using contemporary architecture to create a unique shopping area, attraction of missing retail formulas and the organisation of events in order to attract visitors</td>
<td>Being open towards new retail concepts in order to create a diverse supply and the organisation of events in order to attract visitors and branding the wide range of retail facilities</td>
<td></td>
</tr>
<tr>
<td>Long term vision and unambiguous in the positioning. Knowing how to keep the stakeholders committed</td>
<td>No unambiguous positioning. Ad-hoc branding activities which are not aligned</td>
<td>The DOC is branding actively, of which te rest of the city benefits. The inner-city itself undertakes mainly ad-hoc branding activities</td>
<td></td>
</tr>
</tbody>
</table>

### 8.3 Process

The implementation of The Hague’s city branding strategy is very well organised, using a hierarchic organisation model. A city with over 475,000 inhabitants and 1,436 demands such a well structured method, since a lot of stakeholders are involved. In Almere there are different levels in the city branding organisation model to position the inner-city: City Management, Almere City Marketing and Stuurgroep Stadshart. City Management does not take its responsibility in the inner-city branding and ACM and Stuurgroep Stadshart do not cooperate, which implies that there is no synergy among the activities of the different stakeholders. Roermond does not have a hierarchic organisation structure according to the city branding. Since it is a much smaller city the communication lines are within the organisation are short and effective and there is no need to apply an extensive organisation model. Looking at these three cases is concluded that the bigger a city is, the more hierarchic the city branding organisation needs to be.

In The Hague many activities are undertaken in order to commit the several stakeholders, which results in highly involvement of both public and private parties. In Almere there is less commitment among the stakeholders, each of the different parties is doing his own job. But since they are all aware of the urge to create a strong city brand, they are building on this brand actively. In Roermond the stakeholders, mainly the interdependent retailers, are less involved in the city branding. They assume that they can benefit from the marketing activities of the retail clusters Designer Outlet Centre and Retail Park and are not willing to participate in the branding of their inner-city actively nor financially. Involvement of stakeholders can only be realised when they are aware of the urge of city branding, no matter how the city branding organisation is structured.
Concerning the present branches in the three inner-cities can be concluded that the fashion branch has strengthened its position in both The Hague and Almere. In Roermond on the other hand, the percentage of fashion in the inner-city has declined a little. Probably this is due to the strong competition from the in the Designer Outlet Centre located competition. Due to retail focused city branding the vacancy rate in The Hague has declined. In Almere the vacancy rate has stayed at an acceptable level, despite the doubling of the retail floor space. And in Roermond the vacancy rate has stayed constant, in spite of the extension of the DOC and the opening of the Retail Park. The city branding strategies affect the retail supply positively.
8.4.2 Demand

In all three the cities the visitor numbers increased during the last few years. This is in contrast with the trend of a decline in the number of visitors in Dutch inner-cities. This indicates that the city branding has had a positive effect on each city's number of visitors. Confronting the number of people that visit Almere with the extended retail portfolio though, shows a decline of over 50% in the number of visitors per square meter retail floor space. This implies that Almere's inner-city currently has an over-supply of retail.

In The Hague, Almere and Roermond the applied city branding effects the classification of the retail area positively. The number of A1 retail locations has increased and the consumer flows at the former B and C classified locations have extended as well. In The Hague and Roermond small movements of the A1 area are recorded, due to the development of new retail units. In Almere the inner-city has been doubled and the extension seems to be the prime retail location now, in favour of the old part. The strategy of quality improvement, as applied in The Hague and Almere, has a more positive effect on the existing retail locations in the inner-city, than a quantitative addition.

<table>
<thead>
<tr>
<th>The Hague</th>
<th>Almere</th>
<th>Roermond</th>
</tr>
</thead>
<tbody>
<tr>
<td>Consumer orientation</td>
<td>Increase of the number of visitors in the period 1997-2007 from 27.0 mln to 32.5 mln, which is over 20%. The average length of stay has increased from 120 to 151 minutes in this period</td>
<td>Decline of the absolute number of visitors, due to the addition of retail space. In 2007 approx. 182 visitors per m² retail floor space were recorded, compared to 400 in 2005. the average length of stay has decreased from 64 to 62 minutes</td>
</tr>
<tr>
<td>Retail area classification</td>
<td>The A1 retail area was extended, due to the development of Spuimarkt and the new tram tunnel, which has its entrances at the Grote Markt straat and Spui. The several sub areas are attracting more visitors as well</td>
<td>The A1 retail area moved from the ‘old’ part to the recent developed part of the inner-city. There is still a lack of retail locations with a B classification</td>
</tr>
</tbody>
</table>

Figure 8.4: Comparison of the retail demand
8.4.3 Match

The match between retail supply and demand determines the consumer rewarding. The consumer appreciations of The Hague’s, Almere’s and Roermond’s visitors have not been measured equally. For the average rewarding of each inner-city, different indicators have been used. Therefore it is not possible to compare these rewarding scientifically.

In both The Hague and Almere the consumer appreciation has increased over the period 1997-2007 respectively 2005-2007. In case of the consumer rewarding of Roermond’s inner-city no benchmark is available. The increased consumer rewarding shows that the match of retail supply and demand increased in both The Hague and Almere. Concerning these two cases is concluded that retail focused city branding is an effective strategy to improve this match.

<table>
<thead>
<tr>
<th>The Hague</th>
<th>Almere</th>
<th>Roermond</th>
</tr>
</thead>
<tbody>
<tr>
<td>Consumer appreciation</td>
<td>In the period 1997-2007 the average rewarding has increased from a 6,8 to a 7,3. Especially the improved atmosphere and the Sunday sales are rewarded positively</td>
<td>In the period 2005-2007 the percentage that reward Almere’s inner-city positively has increased from 77 to 87%. The present atmosphere is still the worst rewarded aspect</td>
</tr>
</tbody>
</table>

Figure 8.5: Comparison of the retail demand and supply matches
Conclusions & Recommendations

In this chapter the outcomes of the desk research and the field research are confronted, in order to answer the main research question. This research question was stated as follows:

Is retail focused city branding a useful technique to position Dutch cities as shopping destinations?

This question was derived from the following research objective:

Outlining the role of retail in the positioning of Dutch inner-cities, to gain insight in the opportunities to brand a city as a shopping destination.

In order to answer this main question, several sub research questions will be answered first. At the end of the chapter recommendations for further research are provided.

9.1 Confrontation theory and practice

In this paragraph the conclusions derived from the discussed theory are confronted with the outcomes of the case studies. This confrontation results in answers to the first three sub research questions.

1. Which factors determine the attractiveness of an inner-city shopping area?

Theory

The attractiveness of the inner-city depends on a marketing mix of the aspects retail, leisure, culture, events, accessibility, parking facilities, safety and hygiene. Looking at the present retail is concluded that attractiveness is determined by the presence of a characteristic atmosphere, concentration of a large variety of functions, presence of a mix of specialised shops and warehouses, and the impression of crowded shopping streets.

Practice

The attractiveness of an inner-city is determined by the present atmosphere. The presence of a historical inner-city provides both The Hague and Roermond a well rewarded atmosphere. Almere’s inner-city with contemporary architecture is considered to be anonymous and less attractive. In each of the cases the mix of retail facilities is considered to be highly important to the attractiveness. In The Hague and Roermond the presence of both chain retail formulas and interdependent retailers is appreciated by the inner-cities’ visitors. In Almere the large number of chain stores implies that consumers are missing specialised retail. The case Roermond shows that parking fees have a negative effect to the attractiveness, especially among its inhabitants.
Conclusion

Considering the derived outcomes of the theory and practice outcomes is concluded that they are quite similar. The attractiveness of the inner-city is mainly determined by the presence of a characteristic inner-city, a mix of chain retailers and interdependent retailers and the parking facilities. The first two factors determine customers’ satisfaction level customers in their desire to be entertained in the inner-city. Having an historical inner-city is a large benefit in order to position a city as an attractive shopping destination. A mix of functions in the inner-city, as derived from the theory seems less important. The case Roermond revealed that a city with a singular retail function can also be well appreciated in terms of attractiveness.

Theory

Trends that pressure the number of customers an inner-city attracts, like the growing popularity of internet shopping and the conveniences people experience when they shop in the periphery. A city brand emphasises the existence of coleure locale and a pleasant atmosphere in the inner-city. Therefore it can convince consumers to go shopping downtown instead of in the periphery. In other words; a strong retail focused inner-city brand can assist the inner-city with better accessible retail clusters in the periphery. Next to that city branding can create new demand to retail facilities, since it awares potential customers of the attractive retail facilities an inner-city offers.

Practice

In both The Hague and Roermond the visitor numbers have risen. This does not correspond with the general trend of decreasing numbers of consumers visiting Dutch inner-cities. In according to these case is concluded that retail focused city branding is a useful technique to counter-pressure the ongoing trend of decreasing visitor numbers in inner-city. Taking the doubled retail floor space in Almere's inner-city into account is concluded that the absolute visitor number has decreased substantially. The in this case applied city branding strategy is therefore considered not to be able to resist the trend of visitor number decline.

Conclusion

In two of the three case studies the applied city branding was able to counter-pressure the general trend of decreasing visitor numbers in Dutch inner-cities. Therefore in the context of the case studies retail focused city branding is considered to be a useful technique to enhance customers doing their shopping in the inner-city instead of going to the periphery. Although this is a majority, the outcomes are not evident enough to conclude that retail focused city branding is generally successful in dealing with the trend of decreasing visitor numbers in the inner-city.
Theory
Residents want an attractive place to do their intentional shopping. Retailers aspire an attractive place to do business, in order to attract as much customers as possible. Visitors are looking for an attractive place to do their recreational shopping, they want to be entertained. Investors want to optimise the value of the assets they invest in, in order to optimise their revenues. Municipalities aspire to strengthen the inner-city's position, in order to facilitate the other stakeholders.

Practice
In order to do their intentional shopping residents aspire an attractive shopping area, just like visitors. The average period of stay in Almere is half an hour shorter than in The Hague, which is due to the lack of atmosphere in Almere’s. The attraction of extra consumers strengthens the competitive position of an investor’s inner-city retail portfolio, which optimises his revenues. The last stakeholder, the municipality, can strengthen its competitive position in attracting residents, companies, visitors and investors. Next to improving the city’s economic functioning they are also proud to function better than the competition.

Conclusion
Each of the stakeholders has his own interest in interest in retail focused city branding, but they do not differ as much as expected. For intentional shopping an attractive shopping area is preferred to, so the interests of both residents and visitors are aligned. Investors go for optimising the value of their inner-city retail portfolio, as derived from the theory. According to municipalities is concluded that they not only want to facilitate the stakeholders, but consider city branding also as a tool to be proud of performing better than the competition.

9.2 Current application
The results of the case studies were supposed to be used to come to a more generalising answer for the fourth and fifth research question. Considering the outcomes though, has to be concluded that they are to poor to be generalised. In paragraph 9.4 recommendations for further research are provided in order to come to more generalised results.

4 How is retail focused city branding being applied in the Netherlands?
In the cross-case-analysis was stated that the intention of each city to apply city branding techniques in order to position their inner-city is similar; increasing the visitor number in order to improve the city’s economic functioning. The applied city branding on the other hand is quite different. Where The Hague and Roermond focus on being an international shopping destination, Almere focuses on its own region. Since the visitor numbers of the first two inner-cities increased much more than in Almere, is concluded that looking across the
borders of a city’s own region attracts extra customers. It should be noted however that Almere’s battle to compete with the nearby located inner-city of Amsterdam is not fair, since this city has an attraction power to people that cannot be equalised by any other Dutch city.

The studied cases show that the city branding’s effectiveness depends from the organisation of its application. The branding of The Hague and Roermond is centralised, which results in higher effectiveness than the fragmented application of Almere’s positioning strategy. Where the first two cities obtained an unambiguous and strong inner-city brand, Almere is still struggling with an indistinct brand. In the context of the case studies is therefore concluded that in order to be effective the organisation needs to be aligned. In the case studies the success of the applied retail focused city branding strategy is determined by a match between the present retail supply and the demand. This match has improved in each of the three cases so the applied strategies turn out to be effective. Unfortunately the level of effectiveness cannot be derived from the match between supply and demand.

### 9.3 Do’s and don’ts

Now the sub conclusions are drawn the in the introduction of this chapter mentioned main research question is answered finally. From the previously stated conclusions is derived that retail focused city branding can be a useful technique to position Dutch cities as shopping destinations indeed. It turns out to be hard to determine its effectiveness, but city branding is not just a matter of achieving commercial success. Is is a line of thought to create a vision, to align and to commit stakeholders and to provide them the opportunity to be proud of their inner-city. Several do’s and don’t are derived in order to apply retail focused city branding succesfuly:

**Do’s:**
- Having deep understanding of retail focused city branding’s line of thought;
- Applying one unambiguous branding strategy;
- Making sure the applied branding strategy fits the inner-city to be branded: be credible;
- Using a centralised organisation in order to position the inner-city;
- Matching the organisation structure to the city to be branded: an hierarchic organisation structure is essential in case of a large city and desired in case of a smaller city;
- Trying to enhance commitment of the stakeholders in order to make them participate financially;
- Monitoring the achieved results in order to keep the stakeholders focused;
- Having a long-term vision in order to create a durable city brand.
Don’ts:
- Applying differentiated city branding activities, since this does not result in an unambiguous city brand;
- Having different parties involved in the positioning separately;
- Giving private parties the responsibility of the city branding: make sure the municipality is involved as an interdependent facilitator;
- Switching from one retail focused city branding strategy to another;
- Applying a city brand that excludes specific focus groups.

9.3 Recommendations

The attractiveness of Dutch inner-cities not only depends from the present retail, also the presence of leisure facilities is important. In order to create a strong city brand a mix of both retail and leisure facilities is desired. Therefore it would be interesting to consider the opportunities this function mix provides in the process of city branding. Next to that it is interesting to get insight in the optimal function mix.

In this research three completely different cities were selected for the case studies, in order to have a wide spread of data. Since the cities differ so much in size they require a specific city branding strategy, so it is hard to compare the case study outcomes. In order to draw more specific conclusions, it would be interesting to compare cities that have more similar features.

In order to gain insight in the effectiveness of retail focused city branding, three cases of cities that do apply branding are compared. Therefore no information is acquired according the performing of city brands without active branding. Comparing cities which do not apply city branding at all with cities that do, would provide more insight in the effectiveness of retail focused city branding.

Improving the economic functioning of the inner-city is one of the major reasons for cities to apply city branding. Consumer spending is an important indicator of this economic functioning. In this thesis the expenditures of customers in the case study cities was not a research topic. In further research it would be interesting to look at the development of consumer spending, in case retail focused city branding is being applied.

In the context of the current credit crunch in the Netherlands it is recommended to conduct research to the role of retail focused city branding in times of financial crisis. This financial crisis has a negative effect on the consumer spending and city branding might be a useful technique to keep up the expenditures in the inner-city.

In this thesis a period of time of five years was taken into account, in order to determine the results of retail focused city branding. Since city branding is most effective when a long term vision is applied, it is recommendable to investigate the city branding results over a longer period of time.
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www.vastgoedmarkt.nl

3. **Interviews**

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Mr. M. Bauwens, director Designer Outlet Center Roermond, November 25th 2008.

Mr. H. Vermeulen, city manager Almere Municipality of Almere, November 28th 2008.

Mr. D. Reijnders, Unibail-Rodamco, shopping center manager Stadshart Almere, November 28th 2008.

Mr. M. Ort, Director ‘Ondernemers Vereniging Stadshart Almere’ (OVSA), November 28th 2008.


Mr. W. Van der Ven, ING Real Estate, adjunct director development, December 3rd 2008.

# Appendix

Phases of City Marketing Development (Karavatzis, 2008)

<table>
<thead>
<tr>
<th>Author</th>
<th>Phase</th>
<th>Goals</th>
<th>Characteristics</th>
</tr>
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<tbody>
<tr>
<td><strong>First Stage: Fragmented Promotional Activities</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bailey 1989</td>
<td>Smokestack chasing</td>
<td>Generating manufacturing jobs</td>
<td>Single goal, subsidies to attract companies, promoting low operating costs</td>
</tr>
<tr>
<td>Ward 1998</td>
<td>Agricultural Colonisation</td>
<td>Settlement of empty land</td>
<td>Vast land available for settlement in a short time</td>
</tr>
<tr>
<td>Ward 1998</td>
<td>Urban Functional Diversity</td>
<td>Selling tangible commodities (land-houses)</td>
<td>Differentiation of specific urban functions (e.g. tourism – suburban)</td>
</tr>
<tr>
<td>Ward 1998</td>
<td>Selling the industrial city</td>
<td>Luring industries</td>
<td>Focus on promotion, incentives for industrialists, limited to marginal parts of urban/regional systems.</td>
</tr>
<tr>
<td>Barke 1999</td>
<td>Selling Cities</td>
<td>‘Selling’ existing aspects of the city</td>
<td>Simple promotion of the city and its attractions</td>
</tr>
<tr>
<td><strong>Second Stage: City Marketing Mix</strong></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Bailey 1989 (adopted in Kotler 1999)</td>
<td>Target marketing</td>
<td>Attracting manufacturing and service jobs in specific industries</td>
<td>Multiple goals, from mass to specialised marketing, physical infrastructure, public-private cooperation, promoting good quality of life</td>
</tr>
<tr>
<td>Barke 1999</td>
<td>Advertising Cities</td>
<td>Change an unfortunate image or enhance a neutral or favourable image</td>
<td>Mere advertising, major concern over image, who produces images?</td>
</tr>
<tr>
<td>Barke 1999</td>
<td>Marketing Cities</td>
<td>Attracting inward investment and tourists, while being responsive to residents</td>
<td>Beyond advertising to include hallmark events, high-profile developments, local firms and residents also important, identify the wishes of potential customers</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Urban regeneration, replacing lost sources of wealth</td>
<td>Key part of reacting to intense competition</td>
</tr>
</tbody>
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<table>
<thead>
<tr>
<th><strong>Third stage: Towards City Branding</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Barke 1999</strong></td>
</tr>
<tr>
<td><strong>Kavaratzi 2004</strong></td>
</tr>
</tbody>
</table>
Nederlandse steden hebben te maken met grote competitieve druk van concurrerende steden. In de strijd om hoogwaardige bedrijven, hoogopgeleide bewoners en bezoekers die geld uit willen geven, is een toenemend aantal steden actief betrokken bij het versterken van hun concurrentiepositie. Aangezien winkelen vandaag de dag wordt beschouwd als de belangrijkste vorm van vrijetijdsbesteding, lijkt de promotie van winkelfaciliteiten die een stad te bieden heeft een bruikbaar instrument om de betreffende stad op de kaart te zetten. Het inzetten van retail teneinde het imago van een stad te beïnvloeden, wordt in de context van deze scriptie beschouwd als citybranding met een nadruk op detailhandel. Diverse Nederlandse steden maken reeds gebruik van deze positioneringstechniek, om een bekende winkelbestemming te worden. Naar aanleiding van deze probleemstelling zijn de volgende doelstelling en vraagstelling gedefinieerd:

Doelstelling:
Het uiteenzetten van de rol van retail in de positionering van Nederlandse binnensteden, om inzicht te verkrijgen in de mogelijkheden om een stad op de kaart te zetten als winkelbestemming.

Vraagstelling:
Is het inzetten van retail in city branding een bruikbaar instrument om Nederlandse steden als winkelbestemmings te positioneren?

Het onderzoek bestaat uit een theoretisch deel waarin relevante literatuur wordt besproken en een praktisch gedeelte dat in gaat op de branding van een drietal steden in de praktijk. Het betreft de cases Den Haag, Almere en Roermond.

Theorie

Citybranding wordt toegepast om het gat te dichten tussen wat een binnenstad is (identiteit) en hoe zij daadwerkelijk wordt beschouwd (imago). Waar citymarketing uit gaat van een doelgroepbenadering gaat citybranding uit van de ‘unique selling points’ van een binnenstad. De sterke kwaliteiten die de betreffende binnenstad te bieden heeft, in de context van dit onderzoek zijn dat de winkelvoorzieningen, worden gebruikt om een city brand te creëren. De stad wordt als een merk in de markt gezet teneinde de concurrentiepositie te versterken. In de citybranding theory wordt een binnenstad beschouwd als een uniek en complex netwerk van verschillende belanghebbenden. Deze betrokkenen zijn bewoners, bedrijven, bezoekers, investeerders en gemeenten. Teneinde een sterk stedelijk merk te creëren moeten de diverse partijen samenwerken. Naast goede onderlinge relaties speelt het individuele belang van iedere betrokkenen een grote rol. Deze belangen komen niet altijd overeen en kunnen het proces van citybranding flik verstoren.

Praktijk

De resultaten van het onderzoek worden besproken aan de hand van de beantwoording van de deelvragen.
1. Aantrekkelijkheid van de binnenstad

De theoretisch aanknopingspunten blijken overeen te komen met de werkelijkheid. De aantrekkelijkheid van de binnenstad wordt voornamelijk bepaald door de aanwezigheid van een karakteristieke binnenstad, een mix van geïntegreerde retailers en onafhankelijke retailers en de parkeermogelijkheden. De eerste twee factoren bepalen de klanttevredenheid wat betreft hun verlangen om vermaakt te worden in de binnenstad. De aanwezigheid van een historische binnenstad is een groot voordeel met het oog op de positionering als aantrekkelijke winkel-bestemming. Een mix van functies in de binnenstad, zoals afgeleid uit de theorie lijkt minder belangrijk. Uit de casus Roermond bleek dat een binnenstad die over vrijwel uitsluitend de retailfunctie beschikt, ook als aantrekkelijk kan worden beschouwd.

2. Impact van de inzet van retail bij citybranding op consumententrends

In twee van de drie case studies is de toegepaste city branding in staat om de algemene trend van dalende bezoekersaantallen in Nederlandse binnensteden steden te trotseren. Derhalve wordt de inzet van retail in city branding beschouwd als wordt beschouwd als een nuttige techniek te verbeteren klanten doen hun boodschappen in de binnenstad in plaats van naar de periferie. Hoewel dit een meerderheid van stemmen, de resultaten zijn niet duidelijk genoeg om te concluderen dat de retail branding gericht stad is over het algemeen succesvol in het omgaan met de trend van dalende bezoekersaantallen in de binnenstad.

3. Belangen van de stakeholders

Ieder van de bij city branding betrokken partijen heeft zijn eigen belang, maar de onderlinge verschillen zijn minder groot dan verwacht. Naast recreatieve consumenten geven ook doelgerichte consumenten de voorkeur aan een aantrekkelijk winkelgebied. Beleggers gaan voor de optimalisering van de waarde van hun retailvastgoedportefeuille. Ten aanzien van de gemeente wordt geconcludeerd dat deze niet alleen de gebruikers van de binnenstad wil bedienen maar city branding ook gebruikt als een instrument om de concurrentiepositie te versterken.

4. Huidige toepassing van het inzetten van retail bij city branding

Aan de hand van een cross-case-analyse is vastgesteld dat de intentie van ieder van de drie steden om city branding toe te passen veel overeenkomsten vertoont; het vergroten van bezoekersaantallen teneinde het economisch functioneren van de stad te vergroten. De gekozen strategieën blijken echter zeer verschillend te zijn. Waar Den Haag en Roermond zich richten op een positionering als internationale winkelstad, richt Almere zich op de eigen regio. Aangezien de bezoekersaantallen in de eerste twee cases het sterkst zijn toegenomen, wordt geconcludeerd dat het aantrekken van bezoekers van buiten de regio succesvol kan zijn. Almere voert een oneerlijke concurrentiestrijd aangezien het centrum van de nabij gelegen stad Amsterdam een zodanig sterke aantrekkingskracht heeft dat geen enkele Nederlandse stad hier aan kan tippen.
5. Effectiviteit van deze toepassing

Uit de case studies blijkt dat de effectiviteit van de gekozen strategieën voornamelijk afhangt van de wijze waarop deze geïmplementeerd worden. De positionering van Den Haag en Roermond wordt centraal aangestuurd, wat resulteert in meer efficiëntie dan de versnipperde toepassing van Almere. De eerste twee steden beschikken reeds over een helder en sterk stedelijk merk, terwijl de binnenstad van Almere nog steeds worstelt met een divergent imago. In de case studies wordt het succes van de toegepaste branding strategieën vastgesteld aan de hand van de match tussen het retail aanbod en de vraag. Het slagen van deze match is vastgesteld aan de hand van de consumentenwaardering; in alledrie de gevallen blijkt de gekozen strategie effect te hebben. De mate van effectiviteit kan echter niet worden afgeleid uit de match tussen vraag en aanbod.

Conclusie

Op basis van de hiervoor weergegeven resultaten wordt geconcludeerd dat het inzetten van retail bij citybranding een bruikbaar instrument is om Nederlandse steden te positioneren als winkelbestemmingen. Het blijkt lastig te zijn om de effectiviteit van citybranding vast te stellen, maar het gaat verder dan het beogen van commercieel succes. Citybranding is een manier van denken om tot een visie voor de positionering van de binnenstad te komen. Daarnaast is het een middel om stakeholders op één lijn te krijgen en te betrekken bij de positionering en ze te mogelijkheid te verschaffen om trots te zijn op hun binnenstad. In het kader van succesvolle implementatie van het inzetten van retail bij citybranding zijn een aantal do’s en don’ts gegenereerd:

Do’s:
- Begrijpen van de denkwijze van city branding;
- Toepassen van een eenduidige branding strategie;
- Ervoor zorgen dat de toegepaste branding strategie aansluit bij de binnenstad: wees geloofwaardig;
- Gebruik maken van een centraal aangestuurd organisatiestructuur;
- Aanpassen van deze organisatiestructuur aan de te positioneren stad: een hiërarchische organisatie structuur is essentieel in het geval van een grote stad en gewenst in geval van een kleinere stad;
- Trachten de betrokkenheid van de stakeholders te vergroten, teneinde hen financieel bij de laten dragen;
- Monitoren van de bereikte resultaten om de stakeholders te motiveren;
- Aanstellen van de gemeente als facilitator van het branding proces;
- Beschikken over een langetermijn visie om een duurzaam stedelijk merk te creëeren.

Don’ts:
- Toepassen van gedifferentieerde branding activiteiten, aangezien dit niet resulteert in een eenduidig city brand;
- Afzonderlijk uitvoeren van city branding acitiviteiten door verschillende partijen;
- Private partijen de verantwoordelijkheid geven over de branding van de binnenstad;
- Herhaaldelijk wijzigen van de positioneringsstrategie;
- Toepassen van een city brand dat bepaalde doelgroepen uitsluit.