

## Onderzoek branding Nederlandse Kust

Rijksdienst voor Ondernemend Nederland



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Nederland

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On request of the Netherlands Enterprise Agency (RVO.nl), part of the Ministry of Economic Affairs and Climate Policy, Motivaction International B.V. has conducted research to explore to what extent there is support for joint branding of the Dutch coast and, if yes, what this branding could look like.

With the construction of offshore wind farms in the Dutch North Sea, coastal municipalities fear a decrease in tourism. On the other hand, the change to offshore wind farms could possibly hold potential to stimulate a visit to the Dutch coast. On behalf of the Ministry of Economic Affairs and Climate Policy, RVO.nl commissioned Motivaction to explore the potential for joint branding of the Dutch coast among coastal municipalities and provinces in order to (continue to) stimulate tourism and recreation.

The research project started with a kick-off meeting on September 17<sup>th</sup> 2018. The interviews were conducted in November and December 2018.

# Research objective and questions

The research objective is twofold:

1. To explore among the target group (coastal provinces and municipalities):
  - What is needed to stimulate tourism and recreation; and what is being done in this area already.
  - To what extent there is support for and willingness to implement a joint branding of the Dutch coastline.
  - What this joint branding could look like and what the vision on a sustainable coast entails.
  - What marketing is already being done and is directly deployable.
2. To potentially develop a joint vision and brand story that is supported by all the involved parties.

The following research questions are addressed in this study:

- What is the target group currently doing in the field of marketing?
- What is the target group's perspective on the construction of offshore wind farms in the Dutch North Sea and what opportunities and threats do they identify in relation to tourism?
- To what extent is there willingness to implement a joint branding strategy? What pros and cons does the target group see for this idea and under what conditions can it be successful?
- How could tourism and recreation be stimulated with a joint branding strategy and to what extent and in what way can sustainability be part of this?
- In the perception of the target group, what elements are essential to include in a joint vision and brand story?
- Towards which target audience(s) should a joint brand story be aimed?

# Method & set-up

## Qualitative research

- For this exploration, we organised paired and single interviews with coastal provinces and municipalities\*.
- In total, we conducted 22 interviews of 60 to 90 minutes each; 3 with the provinces and 19 with the coastal municipalities. In consultation with RVO.nl, we determined which provinces and municipalities were invited to take part.
- Most of the interviews were conducted on location (workplace), with a smaller number conducted via phone.
- We made audio recordings of all the interviews.

Noord-Holland	Zuid-Holland	Zeeland
1 single with the province	1 single with the province	1 single with the province
8 single/duo's with municipalities <ul style="list-style-type: none"><li>• Castricum/BUCH (triple)</li><li>• Beverwijk (paired)</li><li>• Bloemendaal (paired)</li><li>• Den Helder (paired)</li><li>• Heemskerk (triple)</li><li>• Schagen (single)</li><li>• Velsen (paired)</li><li>• Zandvoort (single)</li></ul>	8 single/duo's with municipalities <ul style="list-style-type: none"><li>• Den Haag (paired)</li><li>• Goeree-Overflakkee (single)</li><li>• Katwijk (single)</li><li>• Noordwijk (single)</li><li>• Rotterdam (paired)</li><li>• Wassenaar (paired)</li><li>• Westland (single)</li><li>• Westvoorne (single)</li></ul>	3 single/duo's with municipalities <ul style="list-style-type: none"><li>• Schouwen-Duiveland (single)</li><li>• Vlissingen (4 participants)</li><li>• Veere (paired)</li></ul>



*\* As per request of the representatives of the coastal municipalities in the project group, we decided in the kick-off meeting to not yet interview entrepreneurs in the hospitality and travel industry in this explorative phase. In a potential follow-up phase about the development of a branding of the Dutch coast, these entrepreneurs will be included.*

# Main conclusion and supportive thoughts

## Main conclusion

Coastal municipalities and provinces have limited concerns about the potential impact of offshore wind farms on tourism and recreation. The urgency of a joint branding strategy, therefore, does not seem high. Despite being open to the idea of a joint branding, the target group sees important barriers for the development of this strategy. The most important barriers are: the limited added value of implementing a joint branding next to existing marketing initiatives, as well as the large diversity of supply along the coastline, making a joint brand story a challenge.

## Supportive conclusions

- The coastal municipalities and provinces are generally satisfied with the visitor numbers. Depending on the importance of tourism and recreation for an individual region, as well as on available budgets, the initiatives aimed at tourism and recreation differ, along with initiatives aimed at living. These initiatives are often carried out in collaboration with other municipalities, entrepreneurs, marketing agencies, et cetera.
- Despite the fact that coastal municipalities are not particularly happy about the development of offshore wind farms, the potential negative effects are difficult to assess. Currently, concerns about a possible decrease in tourism and recreation are minimal. Therefore, the target group does not feel a sense of urgency for a joint branding (next to existing marketing efforts).
- Creating a joint brand story about the Dutch coast is complicated, especially due to the great diversity in the area. Each coastal province and municipality has its own identity and objectives. However, the target group does see some overarching characteristics that could be part of a brand story.
- Overarching brand values and characteristics are: peacefulness, nature, accessibility and diversity. This diversity can be translated as 'something for everyone'. In this, it is important that the unique identity of each coastal municipality gets enough attention. Sustainability should not be the main focus of the branding, but can be a component.

# Conclusions: triggers and barriers joint branding

In this study, different triggers and barriers for creating a joint branding for the Dutch coastline were identified.

## Triggers/pros

- ✓ A joint branding can help put the Dutch coast on the map properly and reach a wide target audience. And, if well-executed, it can offer the opportunity to highlight the diversity of the coast.
- ✓ Small municipalities with a growth ambition towards higher visitor numbers expect to be able to participate with limited effort and to be part of a professional marketing plan.
- ✓ A more intense collaboration and commitment can improve the quality of the coastline (on multiple fronts, such as hospitality, logistics, sustainability etc.). Besides this, collaboration leads to a stronger impact (power by numbers).
- ✓ Joint branding offers the possibility to tell the story behind the wind farms.

## Barriers/cons

- ✗ The feeling of urgency is missing. The potential negative effects of the wind farms are difficult to estimate for the municipalities and provinces.
- ✗ The coast is too diverse to create one strong brand story; there is fear the story would be too generic.
- ✗ Joint branding demands commitment from all the participants to deliver upon the brand promise; it is unrealistic that all municipalities can and will be able to do so.
- ✗ Some municipalities do not have the ambition to grow their visitor numbers and therefore do not feel the need for joint branding.
- ✗ Municipalities have limited resources they can and want to use to contribute to the creation of a joint branding initiative.
- ✗ Large coastal areas could potentially be dominant in any joint branding, selling short the smaller municipalities with growth ambition.
- ✗ There are too many currently existing marketing strategies. The target group fears an overkill of marketing plans and contradictory positionings.

Based on this explorative research, we are unable to advise with full conviction about a go or no-go decision to create a Dutch coast joint branding initiative. On the one hand, municipalities and provinces are open to the idea; on the other hand, they see many barriers and lack a sense of urgency. Currently, the light seems to be amber and we wonder how realistic it is to continue this project. We do note this study has only been conducted among municipalities and provinces; entrepreneurs have been left out (on request of the project group).

We see 3 possible next steps and look forward to discussing the options with RVO to determine the best next step:

- **Option 1:** We organise an interactive session in which we present the results and ask for additional input regarding support for the branding and preferred next steps. Based on this, the decision will be made to continue or not and, if so, in what way. An alternative to developing a joint branding of the Dutch coast can be to provide information about the wind farms (for external communication) and to share knowledge about how to handle the impact of the construction of offshore wind farms. We recommend inviting entrepreneurs to this session as well, or to give municipalities the task of talking to entrepreneurs about the topic beforehand.
- **Option 2:** We will start working with a smaller group to develop a concept brand story and to make the ideas about a joint branding more concrete. We can use the input of this study to do so. Subsequently, we organise a work session in which we present the results of the study as well as the ideas for a joint branding and it's potential added value. Based on this, the support for the idea can be reassessed. Because the ideas will be more concrete by then, municipalities and provinces can make a better estimate about the added value and their willingness to participate.
- **Option 3:** We decide that currently the support for a joint branding is insufficient and will not take any further steps (work session to develop branding). The results and this decision will be reported back to those involved in writing or verbally.



# **motivation**

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