

RANDSTAD HOLLAND

Structure and Funding of City Marketing

The case of 24 large European Union cities and regions



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Preface

At the end of 2007, 19 leading European cities and regions that had been featured in the Randstad monitor were selected for further investigation (the sample does not include the Randstad Holland cities). Four extra cities were added because of their relevance to the research topic. The cities included in this report are:

Barcelona, Berlin, Budapest, Copenhagen, Dublin, Frankfurt am Main, Glasgow, Hamburg, Helsinki, Lisbon, London, Lyon, Madrid, Manchester, Milan, Munich, Paris, Prague, Rome, Stockholm and Vienna.

The 2 regions of The Belgian Triangle (Brussels, Antwerp & Gent), and The Rhine/Ruhr (Köln, Düsseldorf, Dortmund, Duisburg & Essen) are also included.

Our thanks go to all those individuals across Europe who helped with our research.

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Management Summary

City marketing has been around for some time, and yet there still remain some grey areas. Various authors have written papers and books on the topic but we have yet to see what happens in real life. Although models have been examined, it seems that very few studies have looked at city marketing in the broader sense, i.e. all marketing activities that make a place more attractive for residents, businesses and visitors. In particular there is very little know about how city marketing is organised and funded. This research takes a closer look at 24 cities and regions to try to answer the two questions: How is city marketing structured across the EU, and how is city marketing funded?

In order to look at structures and funding, this research project has identified three areas worth exploring. These are the structures, the strategies and the budgets of city marketing . At an early stage, it has been discovered that few cities have an umbrella city marketing organisation that meets the broad definition, so the research has continued by splitting each city into leisure tourists, business tourists (MICE), foreign direct investment agencies (FDI), and bodies working with residents. Although the original plan was to carry out a quick scan through reports and websites, the thin amount of up to date information available specifically on the web lead us to extend the research method to in-depth telephone interviews with 17 city marketing organisations.

In spite of the discovery that few cities had an overall city marketing organisation, this study has shown that within most cities, there is a significant amount of coordination, leadership and cooperation between separate parties. This is especially clear where the city has a serious need for action such as rebuilding after a terrorist attack.

Structures of individual players in the field of city marketing vary, with residents being looked after mostly by city authority departments. FDI seems to be treated as a very separate activity everywhere and FDI organisations are with only one exception unconnected to other target groups.

In more than half of the cities surveyed, leisure tourism and business tourism were the responsibility of the same organisation, and this was normally a private limited company. However, further investigation showed that in a significant number of cases, these companies had city councils as majority or sole shareholders. It can therefore be concluded that cities are very involved in city marketing.

A number of measurements were taken about the perceptions that interviewees held about aspects of their city's strategy. Overall, there is definitely a positive feel in the sector. A large number of respondents said that they were very satisfied with the way they focussed on their strengths, while quite a few admitted that their city branding still had some way to go before fulfilling their needs. The area where there is least agreement concerns private –

public partnerships. A broad range of scores was given for this area suggesting that some cities do better than others.

The involvement of private and public parties has also been looked at with funding arrangements. In all cities public funding is essential and plays a fundamental role whereas private funding differs and ranges from 0% to 66%. Within the visitor sectors, most private income seems to be generated by subscription fees, sales commissions and joint advertising campaigns. When looking at how the level of public funding was determined, in some cases, it was found that city authorities set key performance indicators to ensure delivery of agreed activities.

An analysis of activities indicated that promotion and communication are the most frequently carried out tasks in all target groups. Planning and market research were identified the least which suggests that most effort seems to be used in the later phases of city marketing.

Based on the data provided, we can conclude that the budget for city marketing does not necessarily correlate to the size of a city. In addition, size did not seem to affect the number of staff working in city marketing related organisations. Some organisations employed less than 10 staff, whereas a number had in excess of 100 on their payroll.

This report concludes with details of the key findings. It has been the intention of the City Marketing & Leisure Management research team to carry out phase 1 of the research, review the results, and then move forwards to phase 2. To this end, a section with further recommendations has been added.

Introduction

Over the past few years, the debate about whether to promote the cities of Amsterdam, Rotterdam, The Hague and Utrecht separately or as the 'Randstad' region has been ongoing (Musterd, 1994). Frequently arguments in favour of the Randstad region are used such as the travelling time: the journey from Amsterdam to Rotterdam takes less than the time needed in London to travel from south to north or to traverse cities such as New York, Beijing, or Tokyo. Another, frequently used, argument concerns the number of residents in the Randstad area which is less than the population of cities such as Paris, Rome and Madrid (Randstad, 2007). What is more, there is a growing acknowledgement that the importance of nation-states is diminishing quickly in favour of a growing significance of cities and city-areas.

With increasing globalisation, the expansion of information-technology and the emergence of the network economy, economic transactions have become footloose: labour and jobs are becoming less tied to traditional locations as globalisation removes barriers to mobility, so cities need to take proactive steps to identify and satisfy the needs of stakeholders if they are to remain contributors to their regional, national and global economies. This is particularly relevant within the European Union, where members have been offered free movement of labour, goods and capital. Consequently cities and city-areas have entered into fierce competition with each other: they fight for inhabitants, organisations and also for visitors.

Within the Netherlands each of the top four cities (Amsterdam, Rotterdam, The Hague and Utrecht) is struggling to enter or return to the top rankings in various subjects: Rotterdam fights to stay one of the top harbours, Amsterdam battles to stay among the top five areas for foreign business investment, The Hague wants to continue to be among the top four UN cities and Utrecht works hard to stay one of Europe's top cities for research (it's university is in the 2007 Times Higher Education top 50 world ranking for natural sciences). In addition to international competition, internal or Dutch competition may also be distinguished among these four major cities often to the surprise of foreign competitors. And although cooperation between the provinces and major cities is improving, we have yet to see a single structured marketing and promotional campaign for the Randstad area. Moreover, there are very few signs of cooperation between the larger Randstad cities: fragmentation and competition among them seems to dominate and sometimes even to thrive (Lombarts, 2008). This takes place at a time when funding and resources in each individual city and province are limited and the competition from outside is fierce and abundant.

The strong global competition and the need for economic development of the Randstad region compared with its European competitors, led to the foundation of the Holland Business Promotion Office in 2006. Its mission is:

'To coordinate, initiate and support the marketing and promotional activities which help to create the image of 'The Randstad' as being at the economic top of the international business world in order to attract more organisations and investments to The Randstad ensuring that The Randstad re-enters the Top Five of the European most attractive economical regions'(HBPO, 2007)¹.

The Holland Business Promotion Office (HBPO) sets itself the goal to introduce and obtain one combined promotional effort for the Randstad, comprising the four provinces and four major Dutch cities, Amsterdam, Rotterdam, The Hague and Utrecht. One of the tangible activities so far has resulted in a list of overseas trade missions from the four major Dutch cities and provinces. By highlighting the fragmented promotional activities that take place, HBPO attempts to persuade the major partners to harmonise their activities with the aim of increased exports of Dutch products and improved foreign direct investment. HBPO's partners believe that by adopting the best strategies, the Randstad region can improve its competitive position within Europe so that it regains its top five economic area ranking.

Another initiative of HBPO is the research at issue. The aim of this research is to investigate the structures and funding of city or destination marketing organisations in Europe in order to analyse relationship between the successfulness of certain cities and/or regions and their organisational structures. 'Regio Randstad' has been producing the Randstad Monitor since 2004 in an attempt to present the most relevant data concerning key indicators of success in Europe's largest cities and economic areas (Randstad, 2007). Although this data helps to provide some explanations, it also raises questions about other more complex factors that might have an influence on a city's success. However, as a starting point for this project, the European cities and regions mentioned in the Randstad Monitor have been used.

The research took the cities of the Randstad monitor as a starting point and investigated city marketing in each of these cities. It draws upon data collected from reports, websites and telephone interviews. The study endeavours to give a better insight of the organisational structures and funding of city marketing in competing European cities.

This report is structured as follows: first, we will delve into the existing literature on city marketing and describe our understanding of city marketing. Next, the methodology used

¹ Translated freely from HBPO's website

will be explained. Then, we will analyse and discuss the most important findings. To conclude, we will reflect on the possible further research and advise how to progress in the second phase of the research.

Recent developments within City Marketing

City marketing has been around for decades so is no longer a new topic for those involved in developing the economy of their city, yet as Paddison (1993) pointed out 15 years ago, the meaning attached to the term city marketing has a number of different interpretations, and this still seems true today. In the US, city marketing seems to focus on the promotion of place and encouragement of public-private partnerships (PPP's). In this interpretation, city marketing could be seen as an activity with significant private sector involvement, where the goal is to generate economic benefit in a relatively short time by promoting existing locations. By contrast, the Dutch interpretation according to van de Berg (1990) takes a broader approach and adds physical and social planning to the US idea with the goal of generating a harmonious city where visitors, residents and businesses are all satisfied. According to Paddison (1993), place marketing in British cities has been closely confined to economic objectives in a similar way to the USA. On the other side of the globe, an example of a holistic approach can be found in the Economic Development Strategy of Porirua 2000-2010 (a medium sized New Zealand city in the Wellington region). Here, economic, social and environmental goals are balanced in order to ensure that development is sustainable and all parties share in the economic benefits.

Paddison (1993) pointed out that promoting a place and implementing policies to attract new businesses has been a key role of city authorities for many decades. He suggests that city marketing is more than this in that it also aims to reconstruct a city's image and targets specific activities to reinforce this image.

Since its emergence, city marketing has become a common practice within urban entrepreneurialism and is broadly regarded as vital for the economic and social wellbeing of the city or even for its survival against harsh competition with other cities. Its importance is endorsed by the myriad of studies on the various aspects, perspectives and developments of city marketing; for instance the structure and the governance (Ashworth, 1988; Barke, 1999); the entrepreneurship, marketing and selling of cities (Gold, 1994; Hall, 1998; Kotler, 1999; Ward, 1998); the branding, identities and images of cities (Allan, 2005; Anholt, 2005, 2006; Kavaratzis, 2005; Morgan, 2003; Noordman, 2006; Olins, 2002; Pellenbarg, 1991). However, none of these studies has delved into the organisational structures and funding, nor has been related to the success of a city's economic development and progress in relation to the city marketing's' organisational structure and funding.

Lombarts (2008) describes the fragmentation in the city marketing cooperation as 'plurifold': not only is the cooperation geographically fragmented but also sectorial. By geographical we mean that comparable services and facilities offered by organisations are promoted on a local, regional and national basis. Sectorial means that divisions are made by sector i.e. the sectors responsible for export to foreign countries, inward investments, incoming tourism etc. In addition, there are also points where each sector is represented on a local, regional and national basis.

Although city marketing seems to exist already for quite a while, city marketing as an integrated concept seems to be fairly new concept. The definition is still rather ambiguous and therefore it lacks a clear understanding of what can or may be done with it. We will therefore demarcate city marketing as a long-term process or policy instrument consisting of various activities to attract targeted user-groups. Commonly, these target user-groups are divided into three main categories: residents, organisations and visitors.

Pechlaner, Zehrer & Tancevski, (2003) state that goals of city marketing organisations vary from city to city due to varying conditions, size and function. They carried out research in 70 cities in Austria, Switzerland and Germany in 2002 and have developed the four different types of city marketing organisation based on work carried out by Wirth and Hödl in 2002. The types are:

- The Classical Marketing organisation, which aims to revitalise the city centre, improve access and increase purchasing power and customer loyalty.
- The Management of Places organisation, with the goals of job creation, foreign direct investment and development of the city's economy.
- Fundamental City Marketing, which has multiple goals of boosting the city's attractiveness, increasing efficiency in the tourist sector, re-positioning the city, supporting trade and the economy, focusing on special target groups, and winning the support of local residents.
- A Regional Marketing organisation, which supports cross regional cooperation, boosts name recognition within the region, and promotes tourism and the economy.

Although the models identified by Pechlaner are interesting, there seem to be little evidence that these are commonly used across Europe. Therefore, rather than using these models, we will use a different approach to divide city marketing activities. Our focus will be on four different target groups within a city, with city marketing activities being divided into those aimed at leisure tourists (overnight stays and day trippers), MICE visitors (meetings, incentives, conferences, and exhibitions), new and expanding companies (FDI) and residents / workers. These four categories can also be split into internal stakeholders (existing companies, residents and workers) and external stakeholders (leisure tourists, business tourists and new companies).

Pechlaner et al (2003) found that city marketing organisations are generally supported by the city, banks, companies, institutions, & tourist associations. Most will be headed by a board made up of representatives from the city and tourist associations. The most common structures in Pechlaner's study were found to be part of the city administration, a limited company, a voluntary association, or flexible organisation (with working groups). In the case of voluntary associations, these comprise members, a board, an advisory council, working groups and a Managing Director.

The rest of this report reflects on organisational structures that can be distinguished and are firmly in place and assesses which financial schemes can be discriminated. This is achieved through an exploratory study in 24 cities and regions.

Methodology

This research project sets out to find out what structural and funding arrangements exists for city marketing within twenty four major European Union cities and regions. The research covers the following two main themes:

1. The way city marketing is organised in these twenty European cities
2. The way city marketing is funded in these twenty European cities

A number of subjects and related questions are then worth asking to discover:

- What is the city marketing structure?
 - How is City Marketing set up across Europe?
 - Who are the stakeholders involved in CM?
 - What is the division between public and private organisations involved
 - What is the legal structure of the CM organisation? – Ltd, association, foundation etc?
- What is the city marketing strategy?
 - Is there a CM plan or strategy?
 - What are the goals and sub-goals of CM?
 - What issues are agreed upon, and which are not?
 - What are the key activities undertaken to market the city?
- What is the CM budget?
 - How is the budget for CM activities determined?

- How is the division of the budget itemised to public funding and private funding?
- How many staff are employed within city marketing?

Research is to be carried out in two phases. First, desk research will be undertaken to obtain a broad idea of the general status of city marketing in the various cities and regions. Next, a small number of personal interviews are planned so that the issues found in phase one can be examined in more depth. This report describes the first phase.

For the first step of the desk research, a group of 3 students, complemented by members of the research group and the lector, used websites and published articles to delve into existing city marketing structures in those cities featured in the 'Randstad monitor'. Although all cities had websites, little information could be retrieved about structures and funding. It was decided to investigate further by means of telephone interviews with senior managers of key organisations in each city. A qualitative telephone survey was designed to ask questions in a semi-structured and consistent manner relating (see appendix A). Interviews lasted approximately half an hour and covered the subjects discussed before.

Analysis was carried out using data matrixes which provided the possibility to compare the mutual data. Furthermore, a sort of codebook analysis was used for the qualitative part i.e. the interpretation of the interviews. For the purpose of this research it would be going too far to discuss the techniques used in greater extent and we will confine ourselves stating that the techniques used suit the exploratory nature of this research.

Findings

Despite our best efforts, one of the biggest challenges here was to identify and secure a suitable interview time with senior managers in each organisation. In Belgium, Portugal and Italy, this proved a bit too difficult. However, of the 24 cities in the research domain we obtained additional information of 17 cities. The interviewees originated from all the three main domains we were looking at. The findings are structured following three main subjects: organisation structure, strategy and finances.

Structure

An overall city marketing organisation or an umbrella organisation for city marketing is still not a common place; generally can be said that there are no overall city marketing organisations in place in the sense that there is one organisation representing the main activities to market and promote to attract residents, organisations and visitors. Most cities have marketing and promotion organisations specifically in the tourism domain but also for foreign direct investment.

Table I (see overleaf) shows the cities featured in the research and identifies organisations with prime responsibility for the four main target groups. A colour coding system has been used working from left to right as follows:

Red shows cities where an overall city marketing organisation seems to be in place. In some locations, the same body is responsible for leisure and business tourism, and in two cases, they are also active with city marketing for residents. In these instances, all included target groups are coloured red. Note, some organisations were found that called themselves city marketing, but did not have responsibility for overall coordination or more than one target group, for example Glasgow.

Green is used to show leisure tourist organisations that are not covered by overall city marketing bodies. This is the majority. In more than half of the cities researched, the green colouring also stretches over to business visitors, and in a small number, the same organisation is also active with residents. If only one column is coloured green, this means that the leisure tourism body does not work with any other target group.

Orange is used in the five cities where business tourism is run by a separate organisation to leisure tourism. Organisations coloured orange only work with one target group, and seem to specialise in congresses.

Blue is used for organisations who's remit is to attract FDI. Nearly all cities have a separate FDI organisation, and only two cities can be seen to have an FDI organisation that also markets to residents.

Purple is used to identify those organisations that are only involved in marketing to residents. On this chart, all purple cells contain municipal offices.

Finally, yellow has been used to show those cities where despite considerable effort, very little information could be obtained.

Table I

Top cities and regions	Who is involved in city marketing?				
	overall CM	leisure tourists	conferences	FDI	residents
Antwerp		Stads promotie Antwerpen		Bedrijven Parket Antwerpen	Stads promotie Antwerpen
Dortmund	City Marketing Gesellschaft	Dortmund Tourismus e.V.		Wirtschaftsförderung Dortmund	City Marketing Gesellschaft
Duisburg	DMC Duisburg Marketing GmbH			Gesellschaft für Wirtschaftsförderung	DMC Duisburg Marketing GmbH
Düsseldorf		Düsseldorf Marketing und Tourismus GmbH		Wirtschaftsförderung Düsseldorf	Düsseldorf Marketing und Tourismus GmbH
Essen	Essen Marketing GmbH			Wirtschaftsförderung Essen GmbH	Essen Marketing GmbH
Rhein - Ruhr	Metropole Ruhr				
Berlin		Berlin Tourism Marketing	Berlin Conventions Office	Berlin Partner	City Council
Frankfurt-Rhein/Main		Frankfurt Tourism & Congress		Wirtschaftsförderung Frankfurt	City council
Hamburg	Hamburg Marketing GmbH	Hamburg Tourismus		Hafen Hamburg Marketing	Hamburg Marketing Gesellschaft
Munich		Tourismusamt München		Wirtschaftsförderung München	
Vienna		Vienna Tourism Board		Wiener Wirtschaftsförderungsfond	Presse und Infodienst Wien
Copenhagen		Wonderful Copenhagen		Copenhagen Capacity	
Helsinki	City of Helsinki	City Tourist & Convention Bureau		Greater Helsinki Promotion	
Stockholm		Stockholm Visitors Board	Congress Stockholm	Stockholm Business Region	
London		Visit London		London Development Agency (LDA)	Greater London Authority (GLA) & LDA
Manchester		Marketing Manchester		MIDAS	Manchester City Council
Glasgow		VisitScotland - (Glasgow)	Glasgow City Marketing Bureau	Glasgow City Council	
Dublin		Dublin Tourism	The Convention Centre Dublin	IDA and Chamber of Commerce	Dublin City Council
Paris		Office du tourisme et des congrès de Paris		Paris Development	Marie de Paris
Lyon	ONLYLYON			Aderly Lyon France	
Prague		Information Service	P.E. and P.I.S.	CzechInvest	
Budapest		Department of trade, tourism and consumers interests			
Madrid		Promoción de Madrid			Promoción de Madrid
Barcelona		Turisme de Barcelona	Barcelona Convention Bureau	City council	
Milan	Milano Metropoli Development Agency	Milano tourist board			
Rome					
Belgian Diamond					
Brussels		Brussel Toerisme International Congres (BITC)			
Cologne		Tourismus Köln GmbH			
Gent		City Council department - Stads promotie & Sport			City Council department - Stads promotie & Sport
Lisbon		Turismo de Lisboa - Visitors and Convention Bureau			

The Rhine-Ruhr region with among others the cities Dortmund, Duisburg and Essen seems to have individual city marketing organisations per city but also an overarching structure for the region: 'Metropolis-Ruhr'. Apart from these cities, only another North-European city i.e. Helsinki seems to have a more or less structured organisation. The more south we look, the less structure or central organisation seems to be found: it was difficult or unfeasible to obtain information from some cities such as Rome and Lisbon. However, surprisingly Lyon looks well-organised from their website: they have grouped activities for residents, organisations, both public and private and for visitors all under 'Only Lyon' and they pay special attention to students.

Delving into the cities and/or regions, one may remark that the stakeholders are disperse: from the chamber of commerce, the tourist offices, the convention and exhibition centres and/or bureaus, to the university, public transport organisations such as airport and local transport, to local government and representations of the inhabitants².

Almost half of the organisations are to a large extent publicly owned or at least for the biggest part publicly financed. This applies not only to the specific city marketing organisations but also the tourism marketing and promotion organisations and some of the organisations responsible for FDI. The rest of the organisations are public-private partnerships. The split public-private varies from 90-10 to 1/3 to 2/3 and everything in between.

Legal structures seemed to fall into three categories often with different formats for each activity. First of all, organisations responsible for marketing to residents and new companies were more often than not departments of the city council. For FDI, the organisation was sometimes given an independent name, but no evidence was found of privately owned FDI marketing organisations. In a few cases³, the attraction of FDI was seen primarily as a national level activity, with sub offices supporting this at city or regional level.

Leisure and business tourists were often combined with the responsible marketing organisation having a limited liability format. Further research is needed to determine the proportion of private and public bodies, but indications are that the majority are partly funded by the local authority so that the legal format is a limited company under guarantee. By running these activities at arm's length, the municipality can therefore give the tourist organisation the commercial freedom and discipline to react to the market, while also

² For instance OnlyLyon comprises 12 stakeholders: Le Grand Lyon, the Rhône *département*, the Lyon Chamber of Commerce and Industry, Aderly, the Tourist Office, Lyon University, Lyon Saint-Exupéry airport, the Palais des Congrès, Eurexpo, the Medef Lyon-Rhône, the CGPME du Rhône, the Chambre de Métiers et de l'Artisanat du Rhône.

³ Dublin uses IDA and Prague comes under Czechinvest

providing a safety net just in case private funding ceases. Examples including Glasgow and Manchester were found where city marketing visitor organisations were not only funded mainly by public funds, but also had city councillors on their board along with other high profile representatives of the travel and tourism sector.

There are a small number of other legal formats including associations, joint funds and national or regional government bodies. Overall, we can conclude that city councils are involved in the majority of city marketing activities, even though this is sometimes at arms length.

To conclude we may state that city marketing organisations covering the whole range of interests of residents, organisations and visitors are still non-existent. Most organisations are fragmented and represent each aspect separately such as tourism and FDI. Moreover, the first two disciplines of tourism and FDI seem well developed and their representations are clearly documented and visible. The latter, the interests of residents and their respective representative organisations, seem to be of secondary importance or lack any representation at all. This does not mean that there are no organisations of municipal offices responsible for this segment, but it merely means that these are not connected yet to the overall city marketing structure.

The next part looks into the city marketing strategy. It draws on the data gathered primarily from the telephone interviews (17 out of the 24 cities): these data represent the various opinions of the interviewed organisations.

Strategy

Normally structure follows strategy. Organisations are managed by a board of directors who are also responsible for the organisations' overall strategy. Cities, however, are governed by political parties and their representatives who are elected every four years. A change of strategy occurs upon change of political representation in the town hall. Therefore marketing and promotion organisations are often set apart from the city council in order to guarantee certain continuity. This is one of the difficulties with which city marketing organisations are confronted and there are cases in which the city marketing strategy has been adapted to align with new overall city strategy agreements.

In this part this has been disregarded and the focus is upon three main aspects i.e. management issues, planning and control issues and marketing issues. Out of the 24 cities 17 cities have been interviewed by phone and the results are listed below. There were 11 questions asked concerning these aspects. A Likert scale was used ranging from 1 to 5:

1: strongly disagree / very bad

2: disagree / bad

3: neither agree or disagree / average

4: agree / good

5: strongly agree / very good

A Likert scaling is a bipolar scaling method and in this research it was used to measure either positive or negative responses to a statement. The first issues comprise aspects such as agreement on goals, leadership, management and coordination of the city marketing organisation; the planning and control issues concern measurements, planning processes and effectiveness. Last, the marketing issues handle about the brand and local and global focus.

First we look into management issues. It is surprising that there is an overall positive opinion about the agreement of goals. The question, however, is if this is indeed caused by a mutual agreement and understanding on the overall plan or whether this is caused by the fact that the interviewed organisation has agreed upon their (own) goals. The latter may be the case as there are no overarching city marketing organisations that could be distinguished.

Reasons for high agreement on goals offered by interviewees included a general pulling together after serious difficulties such as the IRA terrorist bombs in Manchester and the economic downturn in the Finnish economy after the breakup of the Soviet Union. Figure A shows the high scores for average (3), good (4) and very good (5).

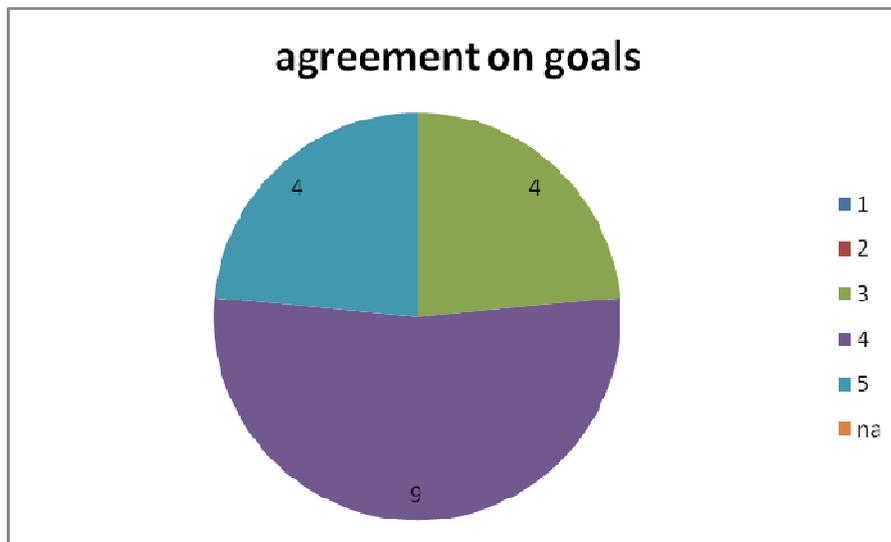


Figure A

The next area this research is keen to learn more about is the way that private and public bodies work together. Within our telephone interview group, the majority judges the management of the private public partnership (PPP) as average to very good. In a small number of cases, there was no answer given as the interviewee was not in a position to comment. The following are a selection of comments that illustrate the varying responses:

'the government is not enough involved, private partnership is better but still new'

'it is not good at the moment, in Lyon public and private partners don't go very well together'

'working good, interest exists from both sides'

Figure B overleaf shows the scores for management of PPPs.

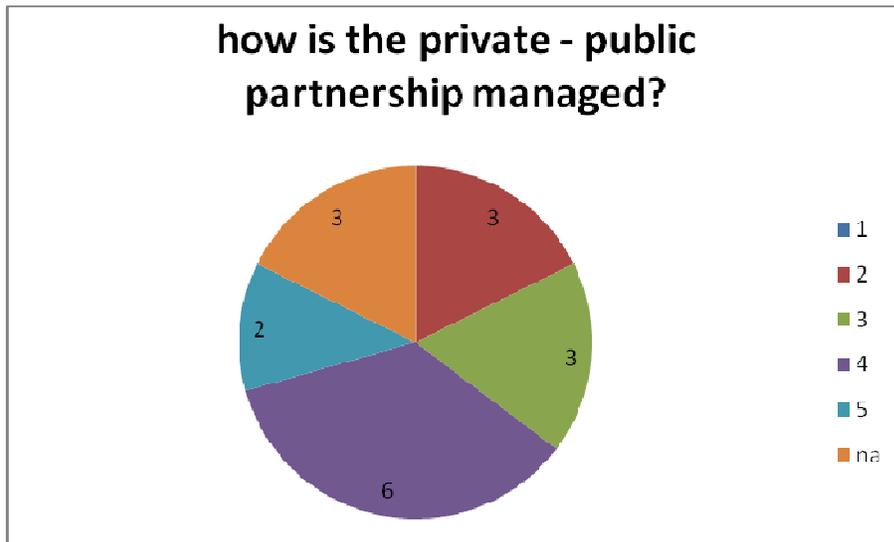


Figure B

Turning to views about the leadership of city marketing initiatives in their cities, Figure C below shows more than half of interviewees seem happy or very happy. However, the following additional comments given indicate a slightly different result.

'they lack experience, work too much on traditional marketing'

'partly understanding for cooperation exists, planning for cooperation and agreement for synergy effects is done in the marketing board committee'

'some parties work very well together and some don't'

'no overall leadership for all parties involved'

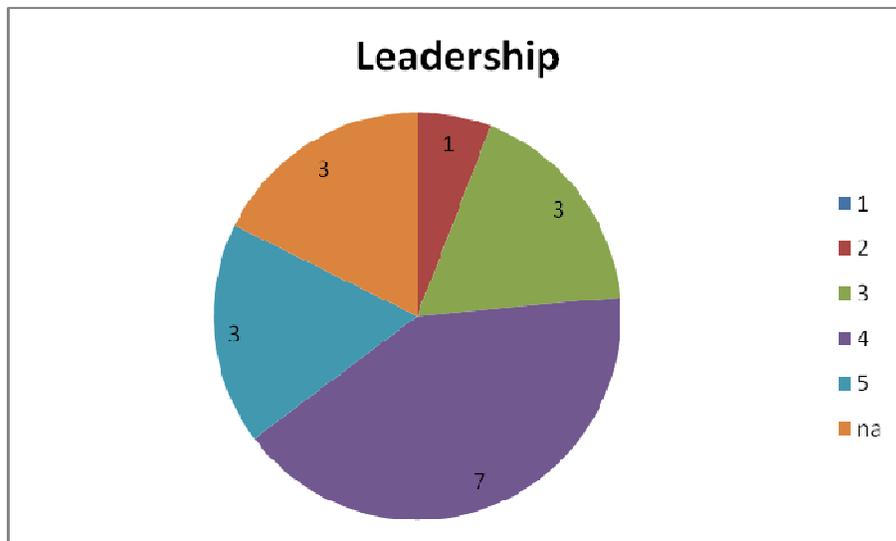


Figure C

In line with the way the leadership is looked upon, the way city marketing is coordinated also receives varying views. Figure D shows that only a third of interviewees said they were happy or very happy with city marketing coordination. The number of parties involved is named twice as a reason for bad coordination but also the lack of mutual cooperation is mentioned. The coordination is judged as very good in a city where also the focus is judged as good.



Figure D

Next, we look into the marketing issues. The questions asked explored perceptions about the brand: the majority of cities start with a logo and motto before they have even a good strategy and we expected that this would be the case as well in our research. Although the chosen brand can cause a lot of differences of opinion i.e. does the brand encapsulate the feel of the city, are the identity and image not too dispersed, it also evokes positive vibes. The level of satisfaction expressed about the brand may be an indicator of this. We have called that brand effectiveness. Indeed the opinions about the brand effectiveness shown below convey rather positive feelings but also endorses our view that often the brand is called upon too early in the marketing process:

'trying to distinguish themselves from other cities'

'it is growing, started 2 years ago, too soon '

'currently popular for congresses and similar business travel but needs a shift'

'great brand, works well, implementation could still be improved'

'the new brand 'making it happen', has been implemented 1,5 years ago'

'very effective'

the numerical data collected to score brand effectiveness is shown in Figure E. The split between scores 4 & 5 (good or very good) and 2 & 3 (bad or neutral) is roughly even.

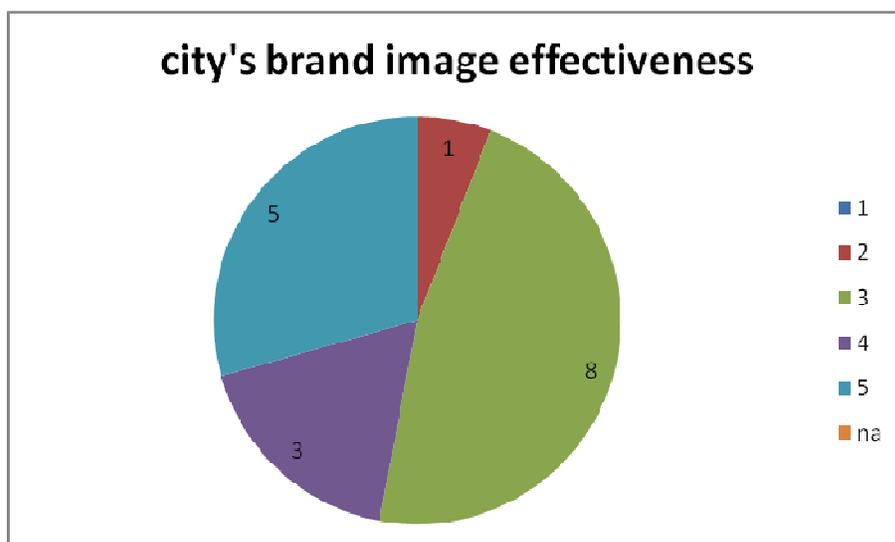


Figure E

Most respondents are of the opinion that the focus of the city marketing is well geared to both local and global needs and interests although there seems to be a slightly higher global focus (see figures F and G for numerical data). As in some other questions, the additional comments are well spread varying from a desire to involve local communities more in major developments to pinpointing a need for more European or global focus.

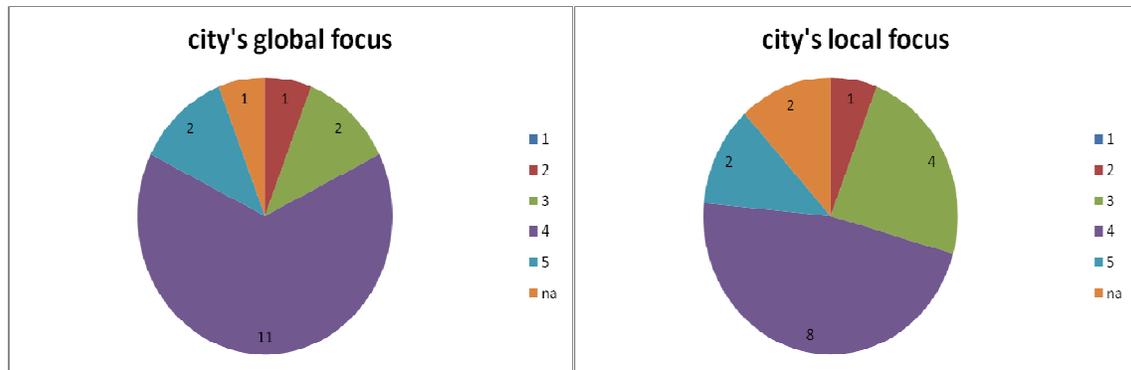


Figure F

Figure G

Researchers noticed that some organisations such as Essen Marketing and Turismo de Lisboa produced websites only in the local language. In contrast, Visit London offers 8 languages on its web site (including Chinese, Japanese and Russian) and Frankfurt's Economic Development agency (Wirtschaftsförderung Frankfurt GmbH) offers 11 languages. More than half of the websites used had at least two language options.

Finally, looking at planning and control issues, the activities mentioned by the organisations researched have some differences. A full list of marketing activities identified can be found in appendix B. To analyse these, they have been categorised into market research, planning, product development, branding, events communication and promotion. The activities have been matched with these categories and the results are shown in appendix C.

Figure H shows a stacked column graph indicating how activities are divided by target group. The first column breaks down tasks carried out by the small number of overall city marketing organisations found. The next four columns do the same for each of the target groups. As leisure and business tourists are often grouped together, their results can be seen to be similar. The final column is an average of all activities.

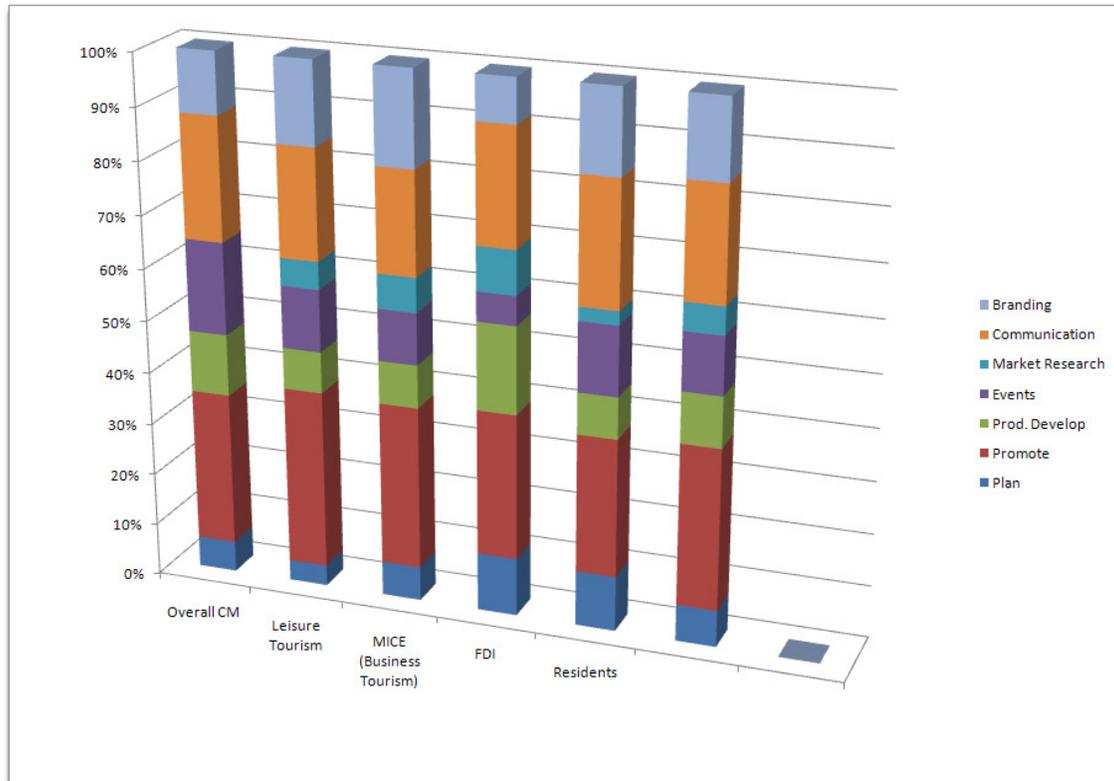


Figure H

The columns show clearly that the most frequently mentioned activities are promoting and communicating. The right hand column shows averages for the other five. We can see some differences and note that branding seems most used in the MICE and leisure sector, events score highest for overall city marketing organisations, and product development seems strongest with FDI organisations. The activities with the lowest scores are market research and planning. By considering phases, it would seem that the organisations in this research focus more on the later stages of communication and promotion than they do the set-up stages of analysis and planning however further research could elucidate this.

Looking at individual cities, it seems that the broadest range of city marketing activities can be found in some British, German and Scandinavian cities. Another observation concerned reactive and proactive tasks. Examples were seen from all four target groups

where an organisation saw a significant part of their tasks as providing information in response to requests, or providing operational support to other parties, or observing an activity. These seemed to add little value. In contrast, some organisations saw key tasks as facilitating good communication, stimulating service providers, or being a catalyst for new ideas. However, with such a diverse range of results, it is difficult to identify other similarities between cities and an attempt to discover patterns of strategies and goals is impossible for us to measure.

Figure I shows how satisfied respondents were with the way in which city marketing activities were measured. Around 75% are very or extremely satisfied.

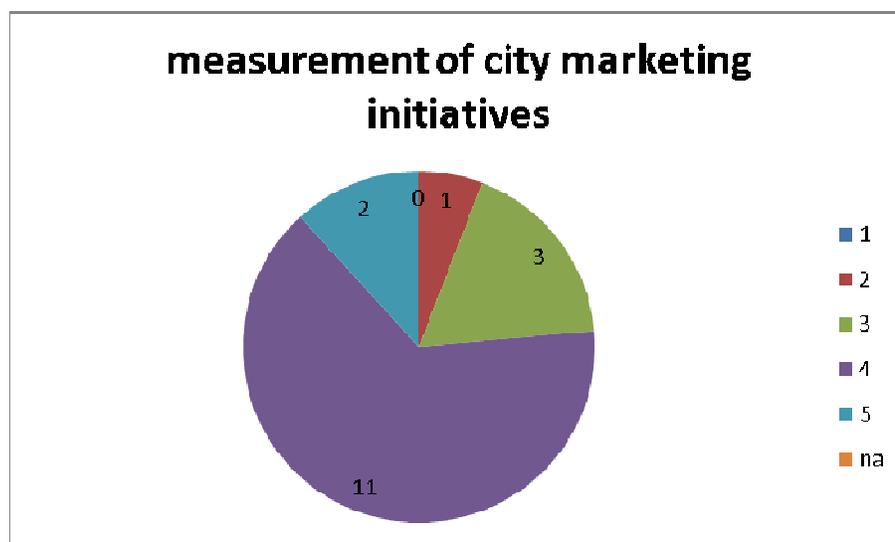


Figure I

Significantly, the comments received show some mixed reactions, but it seems that they often assess on a project basis which probably explains the rather positive opinion. Some respondents explained that as far as public funding was concerned, key performance indicators had to be met in order to qualify for financial support. Some cities have recently started to measure, and they admit that more time is needed before an accurate judgement can be made. Examples of comments received include:

‘activities are difficult to realistically measure’

‘it has only been one year, so it still has to improve’

‘figures are evaluated, revenues are monitored, benchmarking, etc’

'example shopping destination 'city forum pro Frankfurt''

As can be seen in Figure J, the great majority of the respondents is happy about the focus on the city's strengths. All but one interviewee is satisfied or better. This is even the case when there is not an umbrella organisation but still the majority judges that the focus on strengths is generally appropriate.

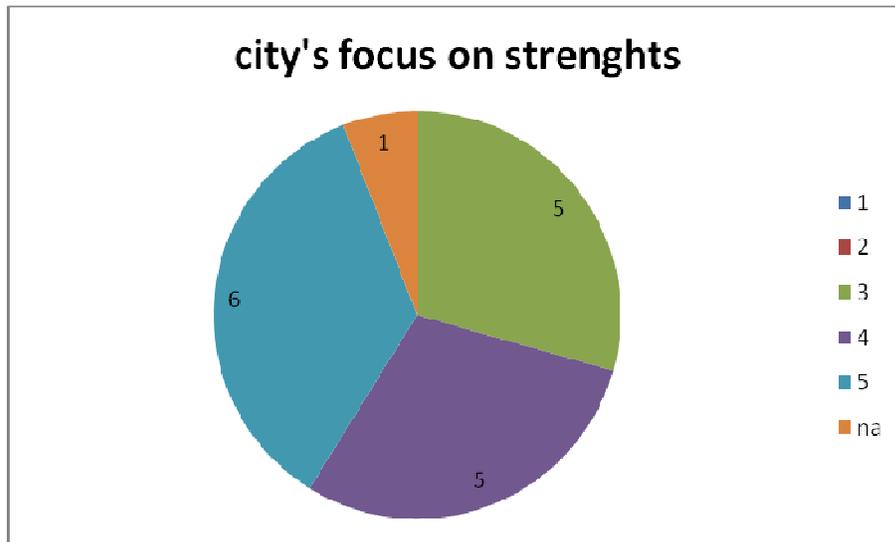


Figure J

The same can be said about the planning process and we suspect that the responses are more related to the internal planning processes of each organisation rather than the overall city marketing process.

Finance

The last parts of our findings concern the financial structures in place for city marketing. Experience shows that an insight into financial arrangements is rather difficult to obtain. There are several reasons for this: first, the fact that most organisations are funded by both public and private money, even when the organisation is 100% publicly owned. Separate activities are funded per occasion for instance events or festivals. Next, the internal support such as manpower to assist with specific tasks is not counted most of the time and therefore not included in the funding. Third, the organisations are not very fond of opening up their internal financial accounts as they fear criticism. After all, how can one be judged and measured when clear goals, procedures, tasks and responsibilities are absent?

The budgets available vary tremendously. Appendix D shows how amounts differ and which budget information was obtained. It seems that tourist promotion and marketing is well

taken care of, while the funding of FDI gives less information and details of the amounts spent to attract and retain residents is completely missing.

The interrelationship between the size of the budgets and the staffing situation (measured in number of FTE's) in the various organisations does not seem to follow a pattern: on the low end Budapest stands out with only 2 FTE presumably because they have an internal focus (interview Budapest), whereas Berlin Tourism employs 141 full time staff, so they are at the higher end of the scale. Nothing sensible can be said about this.

Conclusions

Although the theory about city marketing argues that it is important to deal with all three target groups residents, organisations and visitors, we have not found one city with such an integrative approach.

Understandings of city marketing in all the examined cities vary dramatically. There are destination where city marketing is seen to be an extension of the tourist office, others where it is seen as destination promotion through advertising and PR, a few where co-ordination and network development are the main tasks, and even fewer where all target groups in our definition are given attention. Only seven out of twenty-four cities are dealing with the overall themes of city marketing, including city branding. These cities are Dortmund, Duisburg, Essen, Hamburg, Helsinki, Lyon and the Milano area.

In the majority of cities city marketing activities are being undertaken in mutual collaboration with one or more of the other organisations already in place and responsible for marketing and promotion activities. It follows that in the vast majority of cities, city marketing is split by target group with different organisations taking responsibility for single or multiple target groups. The most common multiple combination was marketing for leisure and business visitors which were organised together in about 75% of cities.

City marketing seems to develop from existing organisations such as the tourism and convention marketing organisations, the foreign development and investment organisations (FDI) and/or the city council for the citizens. The first step towards an integrative city marketing policy hence one overarching city marketing organisation is a separate organisation dealing with the overall city marketing as can be seen in Helsinki and for the Milano and Ruhr area. Other cities have combined the marketing and information facilities into a city marketing activities: Dortmund and Hamburg. In Lyon tourism and convention marketing & promotion have been combined with overall city marketing. Duisburg and Essen are most developed with the integration from city marketing overall and towards visitors and citizens. All cities have still a separate organisation for foreign development and investment (FDI).

City authorities are very involved in city marketing. In some cities, all elements of city marketing seem to be carried out either directly or indirectly by the city council and their departments. Indirect involvement normally takes place via wholly owned limited companies with council representation on the board, which allows some commercial freedom but in essence keeps (arms length) control. Other cities have a mixture of public and private involvement in city marketing. The city brings financial guarantees while the private parties bring specialist knowledge and a commercial flavour.

The research did not find any destinations where the city authority was not involved in city marketing either from a financial point, or as part of the decision making process. All leisure tourist organisations get funding from public sources. Contributions range from 33% to 100% public funding with an overall average of above 50% in our sample. Funds from private sector players are raised to fill any shortfall in public funding via membership subscriptions, joint campaigns and commission for sales and bookings.

Organisational size varies greatly, and in many destinations, it is difficult to determine what proportion of staff time is spent on city marketing activities, but it seems that there is no correlation between staff size and either cities population or the budget available. Division of tasks in a city affects the size of a city marketing organisation and in some situations, a small city marketing office focuses on coordination and lets other parties run operations.

Key city marketing activities per destination and target group vary somewhat. Overall, the activity identified most frequently was promotion, with communication the next most frequent. For business visitors, branding was at the same level as communication, and for residents, promotion and communication were seen as being at the same level. German and British cities identified the broadest range of city marketing activities.

The main conclusion from the above is that city marketing with its actual integrative approach is still in its infancy and is only progressing slowly towards such an approach. In the next part is dealt with some points for discussion and further research.

Discussion

Although the models identified by Pechlaner are interesting, there is only one match with cities in our study (Essen), and very limited data. The types Pechlaner uses may serve though as a point of reference and it could therefore be interesting to use these in further research.

The question arises as to why with the increasing interest and importance of city marketing there is still so little investigation and so little known about the organisational structures, funding and the impact of city marketing: is this because city marketing in one overarching organisation is seen as being too complex?; is it too difficult to change existing organisations?; or is the vast majority still in favour of specialised organisations? These are a few of the questions which can be asked.

Further Research

The data collected and the methodology used give us a very first impression of the situation of city marketing and the way it is organised (or not) abroad. Though it is rather indicative, it elucidates that a fully integrative approach of city marketing is still in its infancy. The cities examined vary in size, number of inhabitants, GDP and numerous other facets. However, they are all competing to become the most attractive city for residents, organisations and visitors.

Most cities have extended their scope outside their original city boundaries and we may see developments into greater city areas such as Rhine-Ruhr, Greater London, Paris and its suburbs, and Milan with its surrounding area. This development endorses the increasing importance of cities compared with nations. The clustering of regional activities and the mutual collaboration on marketing and promotional initiatives provide these regions a better and stronger competitive position. This development becomes most visible in the Rhine-Ruhr area where individual cities such as Dortmund, Duisburg and Essen have combined their efforts into the Metropolis Rhine-Ruhr entity. Although the collective promotion of the region seems a logical step bearing in mind the increasing importance of cities and city-regions, there are still difficulties to overcome.

Furthermore, the Rhine-Ruhr area resembles the Randstad area in that it constitutes individual cities and an overarching region. In addition, this area is economically an important partner of the Randstad and specifically its harbours (both Amsterdam and Rotterdam) are in nearer proximity than the major German harbours and are used extensively as ports. Therefore because of the assumed similarities and challenges, we suggest further research in the Rhine-Ruhr area and its individual cities.

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City websites viewed

Antwerp	www.antwerpen.be
Barcelona	www.barcelonaturisme.com www.barcelonaturisme.com http://www.bcn.es/negocis/en/welcome.htm www.bcn.es
Berlin	www.berlin-tourist-information.de www.berlin-convention-office.com www.berlin.de/pia www.berlin-partner.de
Brussels	www.brusselsinternational.be www.toerismevlaanderen.be www.bruxelles.be http://www.flandersinvestmentandtrade.be/
Budapest	http://www.hungary.com/ http://english.budapest.hu/Engine.aspx
Cologne	www.koeln.de
Copenhagen	www.visitcopenhagen.dk www.copenhagencapacity.com www.kobenhavn.dk www.meetincopenhagen.com
Dortmund	www.dortmund.de http://dortmund-tourismus.de/
Dublin	www.theccd.ie www.dublincity.ie www.dubchamber.ie/about.asp http://www.idaireland.com/home/index.aspx www.failteireland.ie
Duisburg	www.duisburg-marketing.de
Düsseldorf	www.duesseldorf.de www.duesseldorf-tourismus.de
Essen	www.essen.de/emg/
Frankfurt-Rhein/Main	www.frankfurt-tourismus.de www.frankfurt.de
Gent	http://www.gentcongres.be/ www.gent.be
Glasgow	www.seeglasgow.com www.glasgow.gov.uk www.visitscotland.org/
Hamburg	www.marketing.hamburg.de www.hafen-hamburg.de/ www.hamburg-tourism.de www.hamburg.de
Helsinki	www.inhelsinki.fi www.visithelsinki.fi www.helsinki.businesshub.fi www.hel.fi

Lisbon	www.cm-lisboa.pt www.visitlisboa.com
London	www.corporate.visitlondon.com www.london.gov.uk http://www.lda.gov.uk/
Lyon	www.lyon-france.com http://www.onlylyon.com/ http://www.lyon.fr/vdl/sections/en/
Madrid	www.munimadrid.es
Manchester	http://www.marketingmanchester.com/ www.MIDAS.org.uk www.manchester.gov.uk
Milan	http://www.aboutmilan.com/ http://www.milanomet.it/en www.comune.milano.it
Munich	www.muenchen.de www.cp-muenchen.de
Paris	www.paris.fr www.convention.parisinfo.com
Prague	www.pragueexperience.com www.pis.cz/a/ http://pragueconventioncenter.com http://www.prague-info.cz/ http://magistrat.praha-mesto.cz/lang/l2
Rhein - Ruhr	www.rvr-online.de
Rome	www.comune.roma.it
Stockholm	www.stockholmbusinessregion.se www.thecapitalofscandinavia.se www.stockholm.se
Vienna	www.wien.info www.wien.gv.at/pid/ www.wwf.gv.at www.wien.at www.vienna.convention.at www.b2b.wien.info

Appendices

Appendix A - Telephone Interview Questions

Appendix B - City Marketing Activities

Appendix C - City Marketing Activity Categories

Appendix D - City Marketing Budgets 2007

Appendix E – Contact Process Challenges - example

Appendix A - Telephone Interview Questions

Questions asked in telephone interviews with senior representatives of organisations involved in European city marketing.

- | No. | Question |
|-------|---|
| 1 | The first question ask for details about your own organisation / department |
| 1a | What is your legal form? |
| 1b | What is your organisational structure? |
| 1d | What are your main activities? |
| 2 | Bearing in mind the definition we are using for CM, i.e. all marketing activities thati make a city more <u>attractive for residents, businesses and visitors</u> . |
| 2a | Is there a centralised city marketing organisation of group in your city? |
| 2b | If yes |
| 2bi | What us the name and contact details of head of this organisation? |
| 2bii | What is the structure of CM organisation? |
| 2biii | Apart from you, who are the other main partners for CM activities |
| 2biv | Which of these are public and which are private? |
| 2bv | What is the legal form of this organisation? |
| 2bvi | Whati is the size of the city marketing organisationa? |
| 2c | if no |
| 2ci | Except for your organisation, who else shares responsibility for CM? |
| 2cii | Please provide contact details |
| 2ciii | What is the split between private and public parties? |
| 3 | Staying with city marketing, what would you say would be the top city marketing activities carried out by all parties in your city? |
| 4 | Question 4 asks about how city marketing is funded in your city. |
| 4a | What is the total city marketing budget for all parties per year? |
| 4b | What proportion of this would be paid by the municipality? |
| 4c | What does your organisation spend per year on CM? |
| 4d | What proportion of this would be paid by the municipality? |
| 4e | What do you think the split of costs is between public and private funding? |
| 5 | Using a scale of 1 to 5 where 5 means very good, and one means very poor, give your opinion about the Following aspects of city marketing in your city. |
| 5a | Present structure for city marketing |
| 5b | How the private / public partnership is managed |
| 5c | How effectively does the city focus on its strenghts |
| 5d | City marketing coordination |
| 5e | Measurement of city marketing initiatives |
| 5f | The planning process for city marketing |
| 5g | Leadership (or similar) |
| 5h | The effectiveness of your city's brand image |
| 5i | Agreement by all players in city marketing to common goals |
| 5j | The city's global focus |
| 5k | The city's local focus |

Thank you

Appendix B – City Marketing Activities

What are the main marketing activities within City Marketing in the EU?

The following list is based on interviews and a scan of websites, Jan-Feb 2008

1. Act as suggestion box for new ideas
2. Advertising (print, radio, TV)
3. Attend fairs and conventions
4. Branding and positioning
5. Build strategic alliances
6. Carry out a press and PR strategy
7. City development
8. Communicate with partners and other business players
9. Communicate with end users
10. Coordinate and propagate joint initiatives
11. Develop the business climate
12. Direct Marketing
13. Hospitality
14. Monitor costs and benefits of activities
15. Organize events and festivals
16. Product development
17. Promotional support for cultural events
18. Provide information to potential new businesses
19. Provide information to residents
20. Market Research
21. Run networking events for local organizations active in city marketing
22. Secure funding for joint activities
23. Selling
24. Set up and run a web portal
25. Set up and run overseas trade missions
26. Strategic marketing plan
27. Supportive merchandising
28. Tourist information
29. Web marketing

Note – this list is not exhaustive.

Appendix C - City Marketing Activity Categories

	PI = Plan,	Pr = Promote,	PDev = Product Development,	EV = Events,	MR = Market research,	Com = Communication,	Br = Branding
	What city marketing activities were identified in the web-scan and interviews in EU cities for each target group?						
	Overall CM	Leisure Tourism	MICE (Business Tourism)	FDI	Residents		
Antwerp		PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br
Dortmund	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br
Duisburg	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br
Düsseldorf		PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br
Essen	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br
Rhein - Ruhr	PI Pr PDev EV MR Com Br						
Berlin		PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br
Frankfurt-Rhein/Main		PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br
Hamburg	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br
Munich		PI Pr PDev EV MR Com Br		PI Pr PDev EV MR Com Br			
Vienna		PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br
Copenhagen		PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br		
Helsinki	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br
Stockholm		PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br		
London		PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br
Manchester		PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br
Glasgow		PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br
Dublin		PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br
Paris		PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br
Lyon	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br		
Prague		PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br		
Budapest		PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br
Madrid		PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br			PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br
Barcelona		PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br		
Milan	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br					
Rome		PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br
Belgian Diamond		PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br
Brussels		PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br
Cologne		PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br
Gent		PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br
Lisbon		PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br	PI Pr PDev EV MR Com Br

Appendix D - City Marketing Budgets 2007

City Marketing organisations split by target group, showing marketing budget 2007 and public:private split					
Cities and regions	overall CM	leisure tourists	conferences	FDI	residents
Antwerp		Stadspromotie Antwerpen		Bedrijven Parket Antwerpen	Stadspromotie Antwerpen
		€ 8 mln (75% public/25% private)			
Dortmund	City Marketing Gesellschaft	Dortmund Tourismus e.V.		Wirtschaftsförderung Dortmund	City Marketing Gesellschaft
		€ 1.2 mln (50% public/40% own profits/10% private)			
Duisburg	DMC Duisburg Marketing GmbH			Gesellschaft für Wirtschaftsförderung	DMC Duisburg Marketing GmbH
	€ ? (100% public)				
Düsseldorf		Düsseldorf Marketing und Tourismus GmbH		Wirtschaftsförderung Düsseldorf	Düsseldorf Marketing und Tourismus GmbH
Essen	Essen Marketing GmbH			Wirtschaftsförderung Essen GmbH	Essen Marketing GmbH
	€ 4.2 mln				
Rhein - Ruhr	Metropole Ruhr				
Berlin		Berlin Tourism Marketing	Berlin Conventions Office	Berlin Partner	City Council
		€ 12 mln (50-50%)		45% public/55% private	100% public
Frankfurt-Rhein/Main		Frankfurt Tourism & Congress		Wirtschaftsförderung Frankfurt	City council
		€ 5.5 mln (90% public/10% private)			
Hamburg	Hamburg Marketing GmbH	Hamburg Tourismus		Hafen Hamburg Marketing	Hamburg Marketing Gesellschaft
	€ 5-6 mln (55% public/45% private)		€ 9 mln (40% public/60% self finance)		
Munich		Tourismusamt München		Wirtschaftsförderung München	
		13.4 mln (63% public/37% private)			
Vienna		Vienna Tourism Board		Wiener Wirtschaftsförderungsfond	Presse und Infodienst Wien
		€ 22.2 mln (100% public)			
Copenhagen		Wonderful Copenhagen		Copenhagen Capacity	
		€ 18 mln (40%public/60% private)		€ 3 mln (?)	
Helsinki	City of Helsinki	City Tourist & Convention Bureau		Greater Helsinki Promotion	
	€ 1.5 mln (100% public)		€ 3 mln (95% public/5% private)	€ 3.5 mln (100%)	
Stockholm		Stockholm Visitors Board	Congress Stockholm	Stockholm Business Region	
		€ 4 mln (100% public)	€ 2 mln (50% public/50% private)		
London		Visit London		London Development Agency (LDA)	Greater London Authority (GLA) & LDA
		€ 19 mln (66% public/34% private)			€ 45 mln (100% public)
Manchester		Marketing Manchester		MIDAS	Manchester City Council
		€ 7.5 mln (50% public/50% private)		€ 4.5 mln (100% public)	
Glasgow		VisitScotland - (Glasgow)	Glasgow City Marketing Bureau	Glasgow City Council	
			€ 6.6 mln (?)		
Dublin		Dublin Tourism	The Convention Centre Dublin	IDA and Chamber of Commerce	Dublin City Council
		€ 1 mln 2007/€ 2.7 mln 2008 (33% public/67% private)			
Paris		Office du tourisme et des congrès de Paris		Paris Development	Marie de Paris
		€ 10 mln (100% public)			
Lyon	ONLYLYON			Aderly Lyon France	
	€ 0.5 mln 2007/€ 1 mln 2008 (100% public)				
Prague		Service	P.I.S.	CzechInvest	
Budapest		Department of trade, tourism and consumers interests			
		€ ? (50% public/50% private)			
Madrid		Promoción de Madrid			Promoción de Madrid
		€ ? (100% public)			
Barcelona		Turisme de Barcelona	Barcelona Convention Bureau	City council	
			€1,5mln (?)		
Milan	Milano Metropoli Development Agency	Milano tourist board			

Appendix E – Contact Process Challenges - example

These are the steps followed in trying to contact senior managers in city marketing organisations in the city of Glasgow.

Websites viewed: www.seeglasgow.com and www.glasgow.gov.uk

Email for appointment to Christine Lister, PA to CEO, Glasgow City Marketing Bureau. Christine.lister@seeglasgow.com 0044 141 566 0809. No reaction.

Email for appointment to heads of 6 departments and CEO of Glasgow City Marketing Bureau – response from CEO regrettably inability to supply requested.

Email for appointment to Colin Edgar, Head of PR & Marketing at Glasgow City Council colin.edgar@pr.glasgow.gov.uk – no reaction.

Telephone to Colin Edgar, Head of PR & Marketing at Glasgow City Council 0044 141 287 0901 – Mr. Edgar is not available but secretary suggests two other possible contacts.

Telephone to Peter Russell, Deputy Advisor to the Lord Provost Glasgow City Council 0044 141 287 4183 – he confirms that GCMB is a wholly owned subsidiary of the city council, and is run at arm's length. Other examples are Concert Halls, and Culture & Sports. He explains that FDI is run by a combination of Glasgow City Council and Scottish Enterprise Glasgow. He also gives two more names as useful contacts.

Telephone to Richard Cairns, Head of Social and Economic Services, Glasgow City Council (part of Development & regeneration services Dept headed by Steve Inch) 0044 141 287 6000 – This is the person to speak to. An appointment is made for next Friday afternoon, and introduction information is sent to Richard.cairns@drs.glasgow.gov.uk

Subsequently, Richard Cairns is too busy at the agreed time, and each hour later the same day. It is agreed to email the questions to him for return within a week.

No completed questionnaire has been received a month later.

This is just an example of the limitations the team has experienced in trying to reach senior people in city marketing organisations, who all seem to be very busy.