

Changing regional images Are regional marketing campaigns successful?

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Abstract

An important element in the urban and regional development strategy of many local and regional governments is geographical marketing. The process of geographical marketing combines promotional, spatial and organisational activities, and can be aimed at various groups.

In 1989, a marketing campaign was started by the province of Groningen, in the northern part of the Netherlands. This campaign, which is still being carried on, has used various means of communication: advertisements in newspapers and magazines, and radio and television commercials. It has been aimed at entrepreneurs and at the general public as well.

An ex ante study of the public image of Groningen was carried out before the start of the campaign. For this purpose, a random sample of the Dutch population was inquired by telephone. Since then, similar inquiries were carried out every two years, in order to measure the effects of the campaign. In these inquiries, the image of the provinces of Friesland and Noord-Brabant was measured along with that of Groningen, and used for reference.

The availability of this kind of data for a period of twelve years, measured at regular intervals, provides an opportunity to study the development of regional images through time.

In this paper, the data of the inquiries will be analysed. One of the main questions to be answered in the paper relates to the pace and the nature of the changes in image, observed in all three provinces. The second question specifically deals with the influence of the marketing campaign on the image of Groningen.

Introduction

Stimulating economic development is a basic element in the policy of many local and regional governments. Encouraging foreign investment is a common way to accomplish this goal. Perhaps less spectacular, but at least as important for the regional economy, are policy measures aimed at retaining existing economic activities in the area. Apart from companies, other groups are important for the regional economy as well: Visitors, like tourists and shoppers, spend part of their income in the area. Permanent residents, including students, elderly, etc., do the same, but in a more lasting manner. All these groups are therefore important as target groups for local and regional governments.

In all these cases, the success of the involved policy measures will depend on the willingness of people to come to and/or stay in the area. Their willingness to do so is based on the attractiveness of the area as determined by its characteristics. From a behavioural point of view, location decisions like migrating to or visiting an area, are often based on incomplete and inaccurate information. Instead of being directly based on the real qualities of the area, they are based on the perception of these qualities. Seen from this perspective, images of cities and areas are crucial for the potential success of policy measures that are taken to stimulate their economic development.

Policy measures of the kind referred to, aiming to influence the location decisions of particular groups, can be considered to be part of a broader marketing strategy. Cities and regions have always competed with each other for companies, visitors, residents or just the attention of the outside world, applying geographical marketing, often referred to as 'place marketing', as an instrument.

Marketing is commonly associated with promotion, but promotion is just one instrument of geographical marketing. Other instruments are spatial activities and organisational measures (Ashworth & Voogd 1990). While spatial and organisational measures are aimed at improving the actual situation in the place or region, the primary goal of geographical promotion is to change its image. The policy measures that we mentioned at the beginning of this paper, obviously belong to the latter form of promotion.

Considering that the purpose of geographical promotion is to change the image of geographical entities like cities and regions, it is evident that its chances of success partially depend on the extent to which such images are subject to change. This issue will be examined more closely in this paper.

Images of cities, regions, brands, celebrities or anything else for that matter, are generally considered to be fairly stable. Important events or incidents may cause short-term changes in images, but in most cases these changes do not seem to be of a lasting nature. Shifts in images over a longer period of time are of more importance for geographical marketing, and therefore deserve special attention within the context of this paper.

A large data set that lends itself to provide some insight in this matter, has been collected by Walter-Busch (2000). As part of his research, surveys on the regional quality of life were carried out among Swiss recruits in 1978, 1987 and 1996. In each survey, an entire cohort of recruits was interviewed, providing a wealth of data on, among other things, their perception of the quality of life in their home area. The respondents had to assess the community where they had passed most of their life-time, on dozens of scales, that were subsequently used as 'quality of life'-indicators.

The results of these inquiries are highly stable. A comparison of 43 indicators at the level of the 26 cantons, shows that more than 90 % of the correlation coefficients for two consecutive inquiries are higher than 0.6. The lowest correlations are found for indicators of 'objective' factors like unemployment and the presence of certain types of facilities. These low correlations may point to changes in the real world. On the other hand, the 9 criteria constituting the attractiveness profile, representing polarities of a more 'subjective' nature, like calm/restless, beautiful/ugly and progressive/backward, show very high correlation coefficients (0.8 and more). The stability of the results is also demonstrated by the degree of self-similarity: each single canton resembles its own profile in the previous inquiry more than that of any other canton (Walter-Busch 2000, p. 35).

The results for smaller geographical areas like regions, towns and neighbourhoods, are somewhat less stable, but this is partly due to the smaller numbers of respondents per area that are involved.

Analysis of the data on locational preferences of entrepreneurs, collected by one of the authors of this paper (Meester 1994, 1999), provides another opportunity to study possible changes in images. An inquiry was held in 1983, asking company managers to rate a number of locations in the Netherlands on a five step scale, thus expressing the favourability of each location as a possible location for their particular company. Another inquiry was held in 1993. Similar inquiries were also held in 1986 and 1997, with only the northern part of the Netherlands as research area. The results of a

comparison in time show that in both research areas the general patterns and structures did not change very much during the decade between the inquiries. Principal component analysis and other techniques reveal strikingly similar patterns. Most of the changes that did occur relate to details. In the 'national' inquiries, only 9 out of the 70 locations show a significant change in rating, and in the 'northern' inquiries 6 out of 34. Some of the changes in the mean ratings correspond to changes in perception. The perceived importance of infrastructure as a locational factor, for example, appears to have increased. Other changes appear to be related to changes in reality itself. The lower rating of the densely populated western part of the Netherlands, for example, can be explained by the increasing traffic congestion and the relative scarcity of land in that area.

The results of both research projects mentioned here, seem to indicate that images are rather stable and resistant to change, especially when there is no cause for change in reality itself. Within the context of this paper, the value of the two projects is limited however. Walter-Busch (2000) focuses on what might be called 'self-image' or 'internal image': the perception of areas by the people that have their roots there. Changes in the image of geographical entities, as seen through the eyes of others ('external image'), are not part of his research. Meester, in his study of locational preferences (1999), concentrates on just one aspect of the image of a location, relevant for just one target group: its suitability as a possible firm location. A more complete picture is needed, since image, being a mirror of reality, has as many aspects as reality itself, and the importance of each aspect is different for various groups in society.

Groningen promotion

A data set that is more adequate in this respect, is offered by a series of surveys, carried out by the authors of this paper, in the context of a marketing campaign promoting the Dutch province of Groningen (Meester & Pellenbarg 2000).

Groningen, in the northern periphery of the Netherlands, has been confronted with a negative perception by both the general public and Dutch entrepreneurs. Measures to improve the situation seemed to be necessary and useful. Against this background, an organisation called GPO (Groninger Promotie Overleg) was founded in 1987. GPO represents the province of Groningen, the city of Groningen, other municipalities in the province, the Chamber of Commerce, the regional development corporation NOM, and a number of large companies located in the area. Within the GPO, the need was felt to

improve the image of Groningen by means of a promotion campaign. The campaign was to be concentrated on entrepreneurs as well as the general public.

The campaign started in 1989, its most important manifestations being advertisements, television commercials and radio commercials. Initially, only national media were used. Subsequently, regional media in Groningen were used as well, in order to improve the internal image. Recurring elements in these promotional activities are the slogan 'Er gaat niets boven Groningen' and the logo of the campaign. Currently, cultural manifestations, sport events, etc., are used as additional means of promotion.

In order to give the campaign a solid basis, an ex ante study of the image of Groningen was carried out in 1988. RIN (Research International Nederland) investigated the perception of the province by the general public, our Faculty concentrated on its perception by entrepreneurs. To determine the impact of the campaign on the image of Groningen, additional inquiries were carried out at two-year intervals, with only one interruption (in 1998). These surveys, concentrated on the general public, were conducted by the Faculty. The method and the questionnaire were basically the same as those of the survey carried out by RIN in 1988, an approach which was necessary to ensure a maximum degree of comparability.

The data collected through this line of inquiries, measuring the perception of Groningen by the general public, offers interesting opportunities within the context of this paper, due to a number of characteristics: the number of inquiries (six), the regularity of the intervals, the length of the period covered by the series as a whole (twelve years), and its consistency with regard to the method that was applied and the questions that were asked. Additional value stems from the fact that the data set is not limited to one province: in all inquiries, the image of the provinces of Friesland and Noord-Brabant was measured along with that of Groningen, for the purpose of reference.

Measuring campaign effects

In this paper, the data of the inquiries will be analysed, focussing on changes in the regional images that might be noticed. The two main questions to be answered are:

1. What has been the pace and the nature of the changes in image of the three provinces that have occurred between 1988 and 2000?
2. To what extent can observed changes in the image of Groningen be attributed to the influence of its promotion campaign?

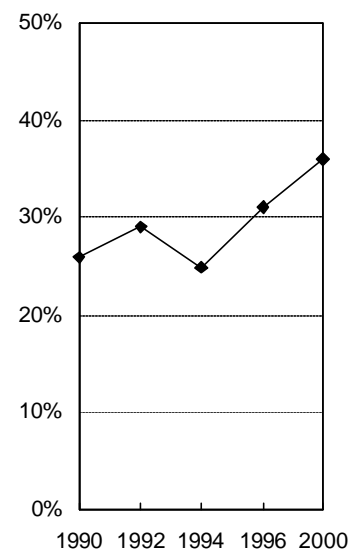
The six inquiries of the general public that we will concentrate on, were held in 1988, 1990, 1992, 1994, 1996 and 2000. In each case, a random sample of the population was inquired by telephone, each province being represented by about the same number of respondents. In case of a refusal, an alternative number was called. In the first three inquiries, there were about 300 respondents each, in the other ones 600 each. The response, initially between 65 and 69 %, has dropped considerably since 1994, to 45 % in 2000. The decreasing response, possibly caused by an increasing aversion of the public against direct marketing by telephone, implies that the results of a comparison in time should be interpreted with some caution. The possibility that people who are not familiar with the research area, are now more inclined to refuse cooperation than they were in the past, can not be ruled out.

In the samples, as mentioned, every province has the same weight. The results shown in this paper however, are based on the average Dutchman. To accomplish this, each respondent has been weighted by the number of inhabitants of his home province.

Recurring themes in the inquiries are campaign awareness, knowledge of the area and appreciation.

Questions about campaign awareness have been asked in all inquiries since the campaign has started. The proportion of respondents familiar with the promotion campaign of Groningen, has gradually been increasing (figure 1). The differences between two consecutive inquiries are not always significant, but the general trend is obvious. Questions about the campaign manifestations that people have noticed, prove that television commercials have been the most successful means of communication in this campaign. That also explains the dip in 1994, when television commercials had not been broadcasted for more than a year.

Figure 1 Campaign awareness



Another interesting point to note about the awareness of the campaign is that it decreases as distance from Groningen increases. Even during the first years of the campaign, when only national media were used, this was the case. People seem to be more receptive to messages about items they are already familiar with.

A second group of questions has served to test people's knowledge of Groningen. In all surveys, the respondents were requested to name companies, persons and events they associated with this province. The average number that a respondent mentioned in each category, has been less than one in all inquiries. Perhaps more interesting from a geographical point of view was the request to estimate the number of inhabitants of the city of Groningen. This request has been part of the inquiries since 1992. The actual number of inhabitants of the city during the research period has been about 170,000. Estimates of 150,000 or less are considered here to be low, and estimates of more than 200,000 to be high.

The size of the city has been underestimated in all inquiries, but the situation is gradually improving in this respect. The proportion of the respondents underestimating the number of inhabitants has been decreasing from 61 % in 1992 to 44 % in 2000 (table 1). The process of change is comparable with that of the campaign awareness, mentioned above: the difference between two consecutive inquiries is not or hardly significant, but the difference between the first and the last measurement certainly is ($p < 0.001$), and the trend is obvious.

Table 1 Estimated number of inhabitants of the city of Groningen

	1992	1994	1996	2000
0 – 150,000	61 %	52 %	47 %	44 %
151,000 – 200,000	9 %	10 %	15 %	12 %
more than 200,000	9 %	13 %	14 %	16 %
no answer	21 %	25 %	24 %	28 %

Another resemblance of underestimation with campaign awareness is that it decreases as distance from Groningen increases. The most realistic estimates were given in the neighbouring provinces.

The general underestimation of its size has instigated the city of Groningen to emphasise its metropolitan character in advertisements, starting in 1991. This may have contributed to the observed shift in estimates, but it is hard to determine its exact influence.

Profiles of provinces

The more 'subjective' side of images is highlighted in the inquiries by a third group of questions, or, to be more precise, a compound question consisting of an introduction and a set of propositions that the respondents have to reply to. Each proposition refers to a particular aspect of image.

In posing the question, three provinces were mentioned to the respondents: Groningen, Friesland (a neighbour and rival of Groningen) and Noord-Brabant (in the southern part of the Netherlands). For those respondents who did not live in any of these three provinces, another one was added to the list: their home province. Subsequently, a number of propositions was mentioned, one by one, each proposition referring to a particular aspect of attractiveness. For every proposition, the respondent had to tell to which of the three or four provinces just mentioned it did not apply, and to which it applied very well. The respondents were free to name just one province, more than one or no province at all.

The propositions that have been used in all six inquiries are the following ones:

1. It is easy to find a job there.
2. It is easy to make contact with people there.
3. It offers facilities for active recreation.
4. It offers many educational facilities.
5. It is a beautiful province.
6. It offers a lot of cultural facilities.

The answers given by the respondents, have been converted to two indices. In order to do this, a distinction was made between three groups of respondents, for every possible combination of province and proposition:

1. those who mentioned the province in a positive way by stating that the proposition applies to the province very well;
2. those who mentioned the province in a negative way by stating that the proposition does not apply to the province at all;
3. those who did not mention the province in answer to the proposition.

The first index measures the number of respondents that have mentioned the province either way (i.e. the members of group 1 and 2 combined) as a proportion of the total number of respondents. This index is referred to as 'profile index', since it gives an indication of the profile of the province, i.e. of its relevance with regard to the topic mentioned in the proposition.

The second index measures the number of respondents that have mentioned the province in a positive way, as a proportion of the number of respondents that have mentioned the province either way (group 1 as proportion of groups 1 and 2 combined). This index is referred to as 'relative value index'. It gives an indication of the way a province is perceived by those who do have an explicit opinion about the province with regard to the proposition.

This particular method of measuring images is not without flaws. One particular problem is that the results are highly sensitive to differences in the attitudes of interviewers, pressing more or less for answers (Meester & Pellenbarg 1995). Nevertheless, the method gives a good impression of the image of the areas involved, and for the sake of continuity, it has not been modified.

The profile indices for the propositions are shown in table 2. The results of the inquiry of 1992 are hard to compare with those of the others, because of a different way of questioning, and have been left out for this reason.

Table 2 Profile indices (%)

	1988	1990	1994	1996	2000
Groningen					
jobs	55	79	66	81	59
contact	56	78	50	81	51
recreation	48	75	50	76	58
education	73	78	65	88	75
scenery	46	81	52	83	59
culture	51	68	49	76	62
Friesland					
jobs	49	69	61	78	56
contact	61	72	54	81	52
recreation	61	72	60	86	69
education	54	66	55	79	53
scenery	60	74	64	87	64
culture	46	63	47	71	53
Noord-Brabant					
jobs	51	73	57	77	57
contact	78	81	67	86	70
recreation	66	71	46	75	58
education	55	70	49	77	55
scenery	71	82	62	86	61
culture	48	69	51	71	54
home province					
jobs	75	87	80	89	85
contact	49	84	64	88	70
recreation	67	80	68	85	74
education	75	82	80	87	80
scenery	75	91	71	92	79
culture	67	81	71	86	78

Explanation of table 2, table 3 and figure 2

Profile index:

('applies' + 'does not apply') / ('applies' + 'does not apply' + neither)

Relative value index:

('applies') / ('applies' + 'does not apply')

'applies': the number of respondents stating that the proposition applies to the province very well

'does not apply': the number of respondents stating that the proposition does not apply to the province at all

Propositions:

1. It is easy to find a job there
 2. It is easy to make contact with people there
 3. It offers facilities for active recreation
 4. It offers many educational facilities
 5. It is a beautiful province
 6. It offers a lot of cultural facilities
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The profile indices for Groningen, Friesland and Noord-Brabant vary between about 45 and 85. The indices for the respondent's home province are clearly higher (about 60 to 90), meaning that the home province has a more pronounced profile than other provinces, as might be expected. In most cases, a respondent will have a detailed image of the province he is most familiar with, making it easy for him to indicate whether a certain statement is appropriate or not. The range of the indices for a province in a particular year is rather small. The main exception in this respect is education in Groningen, which shows a substantially higher profile index than other aspects of this province. The wave-like motion that characterises the general level of the profile indices in table 2, is inherent to the method. It can be attributed to slight differences in the attitude of interviewers, as explained above, so fluctuations in profile indices should be interpreted with caution.

More interesting than the profile indices are the relative value indices (table 3 and figure 2). They represent the level of appreciation of an area with regard to certain aspects of its image. First, we will have a look at the general level of the indices, then we will pay attention to their development in time.

Of the three provinces that have been mentioned to all respondents, Noord-Brabant is unquestionably the one with the most positive image. It has a relative value index of more than 50 for all propositions, which means that its image is positive for all aspects involved. The image of Groningen has negative as well as positive aspects, and the same is true for Friesland. The most positive image is that of the 'home province': its

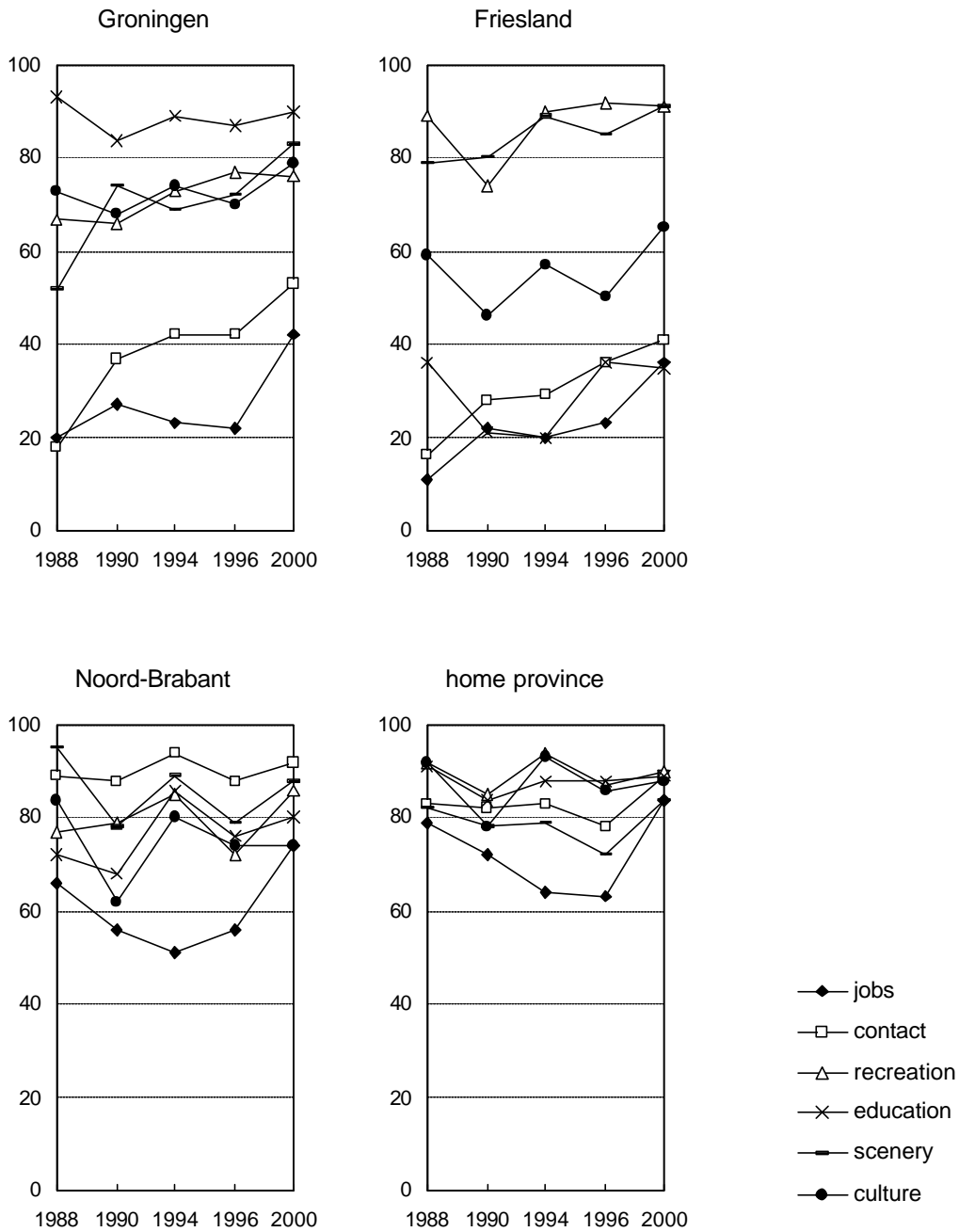
relative value indices vary between 63 and 94. Obviously, we are dealing with a form of locational self-preference here: the tendency of people to rate their own environment higher than more distant areas (Meester 2000).

Table 3 Relative value indices (%)

	1988	1990	1994	1996	2000
Groningen					
jobs	20	27	23	22	42
contact	18	37	42	42	53
recreation	67	66	73	77	76
education	93	84	89	87	90
scenery	52	74	69	72	83
culture	73	68	74	70	79
Friesland					
jobs	11	22	20	23	36
contact	16	28	29	36	41
recreation	89	74	90	92	91
education	36	21	20	36	35
scenery	79	80	89	85	91
culture	59	46	57	50	65
Noord-Brabant					
jobs	66	56	51	56	74
contact	89	88	94	88	92
recreation	77	79	85	72	86
education	72	68	86	76	80
scenery	95	78	89	79	88
culture	84	62	80	74	74
home province					
jobs	79	72	64	63	84
contact	83	82	83	78	89
recreation	92	85	94	87	90
education	91	84	88	88	89
scenery	82	78	79	72	84
culture	92	78	93	86	88

The range of relative values for the northern provinces of Groningen and Friesland is large. The strongest point of Groningen's image is education, which can be explained by the existence of a university. The strongest points of Friesland are recreational possibilities and scenery. Its lakes and islands provide opportunities for sailing, windsurfing, etc. The absence of a university in Friesland explains its low score for education. Weak points of the image of both Groningen and Friesland are jobs and contacts. The chances of finding a job in the northern Netherlands are perceived to be small, and the fact that the inhabitants of the north are supposed to be reserved and silent is reflected in the low scores for the contact proposition.

Figure 2 Relative value indices (%)



Particularly interesting against the background of geographical marketing are the changes in the relative value indices that have occurred. The relative value indices of both Noord-Brabant and the home province show a wave-like motion, similar to that of the profile indices, but in the opposite direction. This seems to indicate that a drop in the profile index, which corresponds to a drop in the number of respondents reacting to the proposition, affects the number of negative reactions more than that of the positive ones.

In other words, the proportion of respondents in group 1 is apparently less subject to distortion than that of the other groups. An explanation for this is hard to give.

In both Noord-Brabant and the home province, the relative value index for job opportunities is the only one that does not follow the general trend. It shows a U-shaped curve, with a low in the mid nineties.

The picture for Groningen and Friesland is a little more complicated. The wave-like motions do occur in these provinces, but other types of change can be noticed as well. Outstanding is the positive trend in the indices for jobs and contacts. Small increases in the index, in most cases without significance, add up to a considerable, and significant, increase during the period in its entirety. The positive trend in the indices for the scenery of Groningen is also worth mentioning. Other changes in the indices should be interpreted with caution, since most of them can be traced back to the fluctuations that are typical for the method.

The next question is what these changes represent. Are they related to changes in reality or to changes in the way it is perceived?

The general wave-like motions, as mentioned above, are inherent to the method and they can not be taken to represent changes in either the perception or the reality in the four provinces concerned. Attempts to relate these motions to the economic cycle fail. An additional possibility that has been checked in this context, is that these motions reflect a general state of mind. The Dutch CBS (Central Bureau of Statistics) publishes an index that represents public faith in the economy. This index has followed a U-shaped curve during the observed period, similar to that of the perceived job opportunities in Noord-Brabant and the home province. Apart from the job proposition however, the relation between the relative value index and the CBS-index is not significant for any combination of proposition and province.

Apparently, for at least one of the aspects of image that were analysed, a connection to reality can be proven to exist: the development of perceived job opportunities closely follows the economic cycle. The relation between the relative value index for jobs in a province on one hand and the registered unemployment in the Netherlands on the other, yields correlation coefficients that are higher than 0.6, and in spite of the small number of measurements involved, the results are significant for both Groningen and Friesland ($p < 0.05$). Contrary to what might be expected, replacing the national unemployment figures by the regional unemployment in each particular province does not lead to a higher degree of significance.

The increase in the relative value indices of Groningen and Friesland for the contact proposition is of a different nature. It can not be linked to changes in reality. There is no proof of a substantial change in the character of the people in these provinces during the last twelve years, and such a change is not very likely either. The trend in the index therefore points to an actual change in perception: the image of the reserved and silent northerner seems to be gradually disappearing. The increasing appreciation of the scenery in Groningen falls in the same category: a substantial improvement of reality can not be proven, it is the image that is getting better.

Another indication of the improving image of Groningen is given by the answers to a question that has been asked in the first and the last inquiry only. Through this question, the respondents were asked to state their willingness to live in the province of Groningen. The proportion of respondents giving a positive answer to this question has increased considerably, from 13 % in 1988 to 35 % in 2000 ($p < 0.001$). The change in proportion is significant in all major areas of the country outside the north (Meester & Pellenbarg 2000).

This immediately raises the question what the contribution of the marketing campaign of Groningen to the positive changes in its image has been. Great caution is required in this respect. The campaign may have had some influence, but the fact that the image of the Frisian people is changing along with that of the inhabitants of Groningen, while there has not been a similar promotion campaign for Friesland, indicates that the campaign of Groningen can not be appointed as the single cause of the improving image of its inhabitants. Apart from that, it is difficult to separate the effect of the campaign from the effect of events that have occurred in the area, and from more autonomous developments.

The data of the inquiries allows us to make a distinction between the images held by the respondents who are aware of the campaign, and of those who are not. The value of this distinction is limited, however, because of selective perception: the respondents who are already familiar with the region are more likely to notice the campaign than others (p. 6 of this paper), and at the same time, because they know the area, they are more inclined to appreciate it (p. 11). In other words, higher ratings by respondents who know the campaign do not prove that the campaign is successful. The respondents that appreciate an area are simply more likely to know its campaign.

Conclusion

The results of the inquiries that were carried out to measure the effect of the marketing campaign of Groningen, demonstrate that certain aspects of the image of geographical entities like cities and regions do change, but slowly. In some cases, small short-term differences add up to considerable medium-term shifts. Some of the changes in image can be attributed to changes in reality, others to changes in perception.

The impact of the marketing campaign on the image of Groningen can not be proven beyond doubt.

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