



# THE FLYING

Whether it is hosting cycling's Grand Depart in the streets of Utrecht or the world's best beach volleyball players on a floating court in The Hague, the Netherlands is marketing itself as one of the most nimble and creative sports industries on the European continent. **Rachael Church**, major events consultant at SportBusiness Intelligence, takes a closer look at the major events industry in the compact nation and finds out more about Brand Holland.

**BEFORE WE EXAMINE** the Dutch philosophy to hosting major events, let's clear one thing up: should we refer to the nation of 16.8 million as Holland or the Netherlands?

Who better to answer the question than Conrad van Tiggelen, marketing director for NBTC Holland Marketing, the entity responsible for branding and marketing the Netherlands domestically and internationally.

"We use the 'Holland' brand, which we consider to be the most recognisable brand for the country internationally," he said. "To market 'Brand Holland' NBTC uses a cooperation model that unites public and private partners.

"Over 14 million international visitors came to Holland in 2014 and they spent €10.2bn," said van Tiggelen. "We are currently focusing on increasing the numbers of international visitors to 16 million per year as part of our Holland 2020 strategy and are currently ahead of our yearly targets.

"These visits are important to the Dutch economy because all in all the hospitality

sector represents an economic value of €65bn and provides work and income for over 590,000 people."

Like many countries that have a large tourism sector, Holland is encountering growing international competition.

"More and more countries, regions and cities are working on beefing up their images and are after a share of the wallets of national and international guests," explained van Tiggelen. "It is not a foregone conclusion that our country will automatically continue to benefit from global or European growth.

"It continues to be necessary to promote the destination 'Holland' systematically among potential travellers. We have specific strategies on using our branding to maintain and grow market share. Sports events can definitely contribute towards that goal."

Holland hosted the Grand Depart to start the 2015 Tour de France off with aplomb last month, and also staged a successful FIVB (International Volleyball Federation) Beach Volleyball World Championships. In 2016,

Amsterdam will host the European Athletics Championships.

"From a branding point of view, major events such as the Grand Depart for the Tour de France and the FIVB Beach Volleyball World Championships allow Holland to showcase itself to the world – both from a city and country perspective – and hopefully attract more international visitors," he said.

"The Grand Depart was especially important to us as a great cycling nation as it allowed us to show both the world and local citizens how we integrate cycling into our way of life – from cycling lanes through to elite sport. That was an event with so much relevance for us as a country at a multitude of levels."

"The whole city lived up to expectations and cheered until the end. There were lots of activities on offer and many volunteers supporting the event. It delivered a very friendly atmosphere," Barbara Peeters, managing director, Infront Netherlands told *SportBusiness International*.

# DUTCHMEN



# We are so small as a nation we have to work that little bit harder

## Multi-Venue Strategy

The 2015 FIVB World Volleyball Championships took place between 26 June to July 5 and for the first time in the history of the event was split across four cities – The Hague, Amsterdam, Rotterdam and Apeldoorn. Niels Markensteijn, managing partner at sports marketing agency TIG Sports organised the event on behalf of the FIVB with an internal team of 30 people.

TIG Sports was awarded the rights to the event in 2012 having been wowed by what was done with beach volleyball at the London 2012 Olympics in Horse Guards Parade.

“We thought that the imagery around the sport was powerful and was impressed with the sport and therefore thought why not bring this to

the Netherlands?” said Markensteijn. “We approached the FIVB and said ‘let’s make a plan for the next five years’. Our aim with the 2015 World Championships was to make every match feel like the actual final and by holding the whole event across four cities we felt we could achieve a greater impact.”

Four centre courts were erected in impressive locations – a floating court in front of the Royal Parliament in The Hague (see pages 26-27), Amsterdam’s Museumsquare, Apeldoorn’s market square and in front of a cruise liner in Rotterdam that the athletes and officials used as their base. It was a risky move in terms of additional costs, according to Markensteijn.

“Those costs were outweighed by large income from spectators and more extensive television

coverage and enabled us to bring more sport to the people of the Netherlands,” said Markensteijn.

“We focused on the big things but also on the small things such as getting the Dutch team to play in orange rather than in the red of previous editions and also involving 3,000 members of the public in a Guinness World Record attempt to play beach volleyball simultaneously. The FIVB have already said it is the best World Championship that has ever been hosted.”

## One Vision

Markensteijn was impressed at the level of co-operation between the cities that co-hosted the event, claiming that they were the biggest supporters overall.

“They promoted the events heavily in their own municipalities and built extra activities around them too,” he said. “They bought into the whole ethos of the sport being mixed with entertainment at all levels. That level of co-operation is what makes the Netherlands strong in the major events industry. Because we are so small as a nation we have to work that little bit harder and in close association with all the major stakeholders in sport.”

Those sentiments are echoed by van Tiggelen: “As well as being a nation that is focused on sport, we are well-known for bringing a level of detail to events and also a level of co-operation between cities when it comes to hosting events that isn’t seen so much in other countries.

“We all know that we first have to sell Holland and then the cities after that because we

## Q&A: ANDRÉ BOLHUIS

CHAIRMAN, NOC\*NSF (Netherlands Olympic Committee\*Netherlands Sport Federation)



### How important are major sports events to the Netherlands?

**What are the reasons for hosting them?**  
In the Netherlands, sport is so much more than just a game, it is one of the most effective and efficient means

to make our country stronger. It fights obesity and unhealthy lifestyles as well as stimulating economic growth and innovation, and it contributes to reconciliation and social cohesion.

That’s why we constantly work hard to increase sport participation. We are convinced that international sporting events contribute to increasing sport participation and have important social and economic effects.

We have always been proud to host international sporting events and admittedly have also gladly provided our athletes

with the opportunity to perform in front of a home crowd, as such we have built up extensive expertise in the field of sport event organisation as well as sport event legacy. Side events have become a solid part of our sport events policy.

### What are the country’s ambitions for Rio 2016 onwards from an elite performance point of view and how are these being activated?

Elite sport brings us together. We strongly support our elite athletes and teams, who inspire us to challenge ourselves. In elite-level sport, it is our ambition to rank among the top ten of sport countries of the world.

To that end, we must raise the bar and the standards for elite sport in the Netherlands from “good” and “better” to “best”.

We have decided to focus our efforts on successful elite sport programmes and organise them in such a way as to make them even better. Athletes must improve their

performances through more training time, better guidance and coaching, plus smarter training programmes.

### Why did the country decide to pull out of hosting the 2019 European Games?

NOC\*NSF decided to pull out because of the decision of the local, provincial and national government that they do not want to contribute financially to the organisation of the 2019 European Games in the Netherlands. This decision left us no other choice than to withdraw as organiser of the event.

### What is the current position on bidding for the Olympic Games in the future?

We understand the relevance of sport as a most effective tool to build healthy bodies and minds and ultimately to help build strong communities and nations. It is because of these benefits of sport we strongly believe hosting the Olympic Games has a lasting positive impact on an organising country and its residents.

NOC\*NSF always keeps a strong interest in hosting Olympic Games and we are looking forward to the moment we will enter the invitation phase at some point in the future ■



are a relatively small country. Therefore, our cities will have dialogue between them when it comes to bidding for events and do what is best for the country as a whole rather than being competitive among themselves.

“In terms of what Holland can offer international sports federations and other organisers of events including cultural ones, not only do we have an excellent public transport system and a major European airport, but we are considered to be open-minded, colourful, well-organised, compact, welcoming and enterprising.”

With the country recently withdrawing as the host of the 2019 European Games for financial reasons and having put its plans to bid for the Olympic Games on hold, despite its long-running ‘Olympisch Plan 2028’, practitioners in the Dutch sports industry are bullish about the country’s future.

The final word goes to Peeters from Infront: “For a small country like Holland, it is quite remarkable that we do organise these great events every once in a while. It shows that the sports community in Holland is willing to come together and take calculated risks in order to make a presence in the global sports world. And there is still room for expansion too in terms of major events. Although some big bids have already been won by Holland I don’t think our ambitions should end here.” ■

## CITY FOCUS: AMSTERDAM

Holland’s tourism capital of Amsterdam rose four places to 12th position in the 2014 SportBusiness Ultimate Sports Cities rankings, up from 16th place in 2012. The importance of sport to the city is exemplified by its Amsterdam Sport Plan 2013-2016, which puts exercise and sports participation by both youth and adults at its core.

Next year Amsterdam will host the 2016 European Athletics Championships, and thanks to the assistance of Dutch sports marketing agency TIG Sports, which recently brought beach volleyball to iconic locations across Holland, it will bring javelin and discus to the city’s beautiful Museum Square, close to the Rijksmuseum and Van Gogh Museum. In 2017 Amsterdam will host the Field Hockey European Championships and is one of Uefa’s hosts for the 2020 European Championships. Events in the city are secured by Topsport Amsterdam in close consultation with DMO/Sport, the sports department for the municipality.

VENUES	USE	CAPACITY
Amsterdam ArenA	Football and events	50,000
Amsterdam RAI	One-off sport events, convention centre	15,000
Bosbaan	Rowing	5,000
Frans Otten Stadion	Tennis, squash	7,000
Jaap Eden IJsbanen	Ice-skating, icehockey	2,000
National Cricket Centrum	Cricket	15,000
National Rugby Centrum	Rugby	4,000
Olympic Stadium	Track and field	22,500
Sloterparkbad	Swimming	5,000
Sporthallen Zuid	Indoor sports	3,000
Velodrome	Cycling	2,000
Wagener Stadion	Field hockey	7,000
Ziggo Dome	One-off sport events, music hall	17,000

Source: Topsport Amsterdam



# BRAND HOLLAND

**Rachael Church** speaks to experts within the Netherlands' sports marketing industry to find what helps the small nation act big.

**DESPITE BEING A** small country compared to its European neighbours, the Netherlands has a vibrant sports marketing and sponsorship industry with global ambitions.

"There is a professionalism in the sports marketing industry in the Netherlands that can match any large market globally," Frank Kolsteeg told *SportBusiness International*. He is founder of GROUND4, a Netherlands-based consultancy with a remit of 'growing life, improving partnerships' in the industry.

Kolsteeg has been involved in sports

sponsorship in the country for 20 years both from a rights-holder and brand perspective with roles at FC Utrecht, Eredivisie Media & Marketing, AEGON and more recently AEG, the leading sports, entertainment and venue operator in the world.

"There's a mentality of 'let's go for it' strengthened by our culture of sport in the country," he said.

"The industry has definitely grown up over the last couple of decades and that has been boosted by the high level of education in the

country through great qualifications in the sports marketing field. We have people here who know what they are doing to great effect."

Barbara Peeters, managing director of Infront Netherlands, is just as confident about the sports marketing industry in her country.

"The sports marketing industry is getting more dynamic in Holland because despite us being just a small market in terms of square miles and inhabitants, we are quite a strong market in terms of sports," she said.

"Sport is anchored in our DNA and in our socio-cultural behaviour. We have lots and lots of recreational sports clubs spread throughout the Netherlands."



## We offer strong emotion, impressive fanbases and lots of volunteers willing to help out

“Top sports federations and organisations are really supportive as well as the NOC\*NSF (Netherlands Olympic Committee and Netherlands Sports Federation). Some of the money outside of sponsorship is definitely coming from these sources. The local city governments are willing to contribute and create impactful events, which is great for the country and its sports landscape.”

### Speed Specialists

As the Dutch subsidiary of Infront Sports & Media, Infront Netherlands’ biggest mandate is its relationship with the International Skating Union (ISU). Thanks to its recent acquisition of Peeters’ former agency Referee Sportsmarketing, Infront is also now the marketing partner for speed skating, the number two sport in the Netherlands after football. Infront owns all the marketing rights for the ISU World Cup and the ISU European and World Championships Speed Skating.

“We are also involved with the ISU as a consultant regarding the promotion of speed skating events and engagement with fanbases other than those already in the Netherlands,” Peeters added.

“We are helping the ISU and local organisers to promote speed skating worldwide in their quest to grow the sport more extensively outside the Dutch market. Recently we have also branched out into helping the ISU find title sponsors for speed skating as well as short track.”

Infront Netherlands also holds a contract with the Royal Dutch Skating Association (KNSB). “We went from being a full service sales and event partner [in 1987] to now being

operationally responsible for all speed skating events organised by them in Holland.”

Peeters adds: “The core business of the former company (Referee Sportsmarketing) was speed skating and we broadened our portfolio there with the professional cycling Team LottoNL-Jumbo (formerly Team Belkin) in 2013 which has now also become a speed skating team, thus turning into an annual proposition [for sponsors].”

“We also do some work in swimming. However, our core business was and is speed skating, which is one of the main reasons we were acquired by Infront.”

### 360 Approach

Peeters believes that the Dutch market has much to offer sponsors and brands.

“The country offers strong emotion, impressive fanbases and always lots of volunteers willing to help out as well as very flexible and professional organisers. Sponsorship is no longer focused just on exposure on national television, there is definitely more of a 360 approach with digital media becoming increasingly important. Among Dutch rights-holders, there is a lot of willingness to adapt to what a brand is looking for.”

Peeters believes that Dutch IT company KPN [see page 83] is a great example of a sponsor that has undertaken a 360 approach across all aspects of their organisation.

“They are main sponsor of the Royal Dutch Skating Association (KNSB) as well as Official Partner of all ISU speed skating events since 2010 and it has been an amazing ride for them,” she says.

Kolsteeg believes that there is less of a focus

### Team Orange

Peeters believes that the market has further been stimulated by local governments helping to bring major events to the country.

“There are many great sporting events coming to Holland and I believe it has much to do with our very large fanbase,” she said. “There is a big passion around sports and ‘Team Orange’.”

“In general the sports marketing business here has become more dynamic and flexible. There is a general ambition, not only among brands but also among government and other sports organisations, to be creative and flexible and produce great events to show the world that we really are a market contender.



## This ‘orange feeling’ is something that any brand can use to its advantage

on sponsorships and more on partnerships in the Dutch market,” she said.

“Sponsors are investing more time – ironically sometimes for less money – in what they can bring to audiences in terms of added value and engagement. Sponsors are also increasingly creating their own events in the country and long-term relationships with communities, which is very positive.”

Currently there are many opportunities in the Dutch market for brands according to Peeters, not only in terms of domestically-oriented sports, but also in sports that have a strong international impact.

“The ISU title sponsorships in speed skating and short track are obviously very strong in the

Dutch market, but definitely have a geographical footprint outside the Netherlands as well,” she added.

“Also there are opportunities for brands to be involved with some of the less mainstream sports in the country such as gymnastics, swimming, water sports, BMX and darts. The latter is a great example of how the success of national stars – in this case former world champions Raymond van Barneveld and Michael van Gerwen – grows the popularity of the sport in a country – which of course becomes attractive for sponsors.”

### Orange Feel

When it comes to characteristics and strengths

within the Dutch sports marketing community, there is a general feeling of prioritising sports as well as high ambitions among very well equipped organisers, according to Peeters.

“We offer creativity and flexibility and there is a great background of sports in our DNA,” she said. This ‘orange feeling’ is something that any brand can use to its advantage. If you are a brand wanting to get a foothold in the Dutch sports industry then there are definitely opportunities in many sports.”

As well as being a hotbed of domestic activity for sponsorships, the Netherlands can boast several homegrown high-profile brands that have achieved success on a global scale.

Both Kolsteeg and Peeters reference Heineken as the best example of a Dutch brand that has showcased itself on the global stage through its sponsorship of the Uefa Champions League.

“Heineken has definitely led the way abroad,” Peeters said. “Royal Dutch Shell and Philips have both done well too. It is really hard coming from a small country such as ours to have a global approach and really integrate this well into a whole campaign.”

“Yet in the case of football, Heineken has found a way to link its campaign to each one of its core markets and enliven it as an integrated part of the organisation’s communications. This is what makes the Heineken brand so strong. No matter where you see Heineken in the world it will have the same identity. Sport has been an integral part of that.” ■

## CASE STUDY: KPN AND ICE SKATING

Originally a telecommunications company, IT behemoth KPN has connected the population of the Netherlands for over 130 years.

These days KPN offers a wide variety of mobile, internet and television services and has brand awareness at 99 per cent in the country. However, awareness does not automatically equal popularity, with customers expecting KPN's mobile, internet and television services to always work perfectly and ready to complain if they do not.

"There is not much appealing emotion around the KPN brand," said Mark Versteegen, head of sponsorship, KPN. "This is where sponsorship gives an opportunity to gain emotion and build relations with fans who are [potential] customers."

In 2010, KPN became main sponsor of the Royal Dutch Skating Association (KNSB) to garner an emotional response to the KPN brand as well as to get in contact with and build relations with millions of Dutch skating fans.

"Skating is a typical Dutch sport that goes back to the Middle Ages and nowadays there are about six million skating fans throughout the Netherlands," Versteegen explained. "Our company KPN goes back to the 19th century, it was the formerly state-owned post and telephone company with all the Dutch people as 'customers'. Skating and our company have a

long history in the Netherlands, are both typically Dutch and therefore a natural, perfect fit."

KPN won the 2015 European Sponsorship Association 'Best of Europe' gold award for its Olympic speed skating campaign based around the 2014 winter Games in Sochi.

"The first ideas for the Olympic speed skating campaign came to mind during spring 2013," says Versteegen. "We were searching for the ideal skating platform for fans, customers and employees with the winter Games in Sochi that would fit with all our brand and business goals. In 2013 the concept of 'The Netherlands' Coolest Ice Rink' was presented, a 400 metre ice track in the 1928 Olympic Stadium in our capital Amsterdam."

A team of six at KPN were fully dedicated to working on the Olympic speed skating

campaign. An additional 40 colleagues were part of this campaign to implement the activation towards relations, customers and employees. In addition to the speed skating sponsorship, KPN became a project partner of the Dutch NOC\*NSF three years before the Olympics in Sochi.

"Although KPN was not a main sponsor, we acquired minimal rights not to conflict with NOC and its partners," says Versteegen. "We still had to obey the rules that nine days before the Games we couldn't communicate anymore with our Olympic athletes. But as we closed a deal with IOC partner Samsung we still continued to reach them via Samsung as a lead communicator. We involved other Olympic sponsors within The Netherlands Coolest Ice Rink project so the Olympic association for KPN was even bigger during the Olympics." ■



### THE MAIN GOALS OF THE SPONSORSHIP

- Make KPN visible as the main sponsor of Dutch (professional) skating
- Acquisition (sales and cross sell) under (potential) customers and relationships with interest in Dutch (professional) skating
- Increase customer loyalty among existing customers and relationships with interest in Dutch (professional) skating
- Inspire and enthuse employees with interest in Dutch skating

### THE CAMPAIGN RESULTS

- €13.7m in value weighted media (TV, print, online and social)
- A sponsor awareness among all Dutch people of 53 per cent
- KPN most recognisable Dutch Olympic sponsor (without being an Olympic sponsor)
- Traffic (store and online) and sales boost during the campaign period of nine per cent
- An increase of all KPN brand values (personal, helpful, genuine and sympathetic)
- An increase of five per cent on average in brand preference and brand sympathy
- A positive Net Promoter Score\* (NPS) on the KPN brand
- 80,000 loyal customers who visited The Netherlands' Coolest Ice Rink
- 10,000 loyal customers who visited the KPN National Championship Allround and Sprint at The Netherlands' Coolest Ice Rink

\* NPS = Net Promoter Score, a metric that indicates the extent to which the services and products of a company's worth to recommending to others.





# DOUBLE VISION

**Rachael Church** asked a pair of de Jongs about the Dutch broadcasting landscape: Jan de Jong, CEO of public service broadcaster NOS, and Alco de Jong, country manager of Discovery Networks Benelux.

**WHEN CONSIDERING THE** Dutch media scene, it is worth highlighting that it isn't a typical European market by any means.

"The broadcasting landscape in the Netherlands is extremely competitive and dominated by 11 free-to-air channels which makes the fight for share of audience particularly intense," according to NOS CEO Jan de Jong.

"The country is very well-developed when it comes to cable with audiences having over 500 channels to choose from. Unlike other markets in Europe, there is not a highly developed pay-market, Dutch people simply aren't used to paying for content. Pay-television companies

have to do deals with the cable or telco operators if they want to reach customers, compared with say Sky Sports in the UK that can invoice customers directly."

Jan de Jong adds that there is not such a battle for sports rights compared to other European countries due to the structure of the market.

"Many of the commercial free-to-air operators have not shown a lot of interest in sport as they prefer to own the content themselves," he says. "This may change however next year when gambling laws are liberalised in the country and they get the opportunity to create betting opportunities around programming."

The main sports in NOS' portfolio include football, speed skating, tennis and cycling. The recent Grand Depart in Utrecht for the Tour de France peaked at 1.6m viewers (10 per cent of the country's population) and a 70 per cent market share.

"We also cover large events such as the FIH (International Hockey Federation) World Championships and the recent FIVB (International Volleyball Federation) Beach Volleyball World Championships that attracted 1.2m viewers for the final.

"What is great about the Dutch television audience is that although they are of course passionate about following the Dutch team in any sport, they are also highly interested in following neutral events."

The Olympics have long been an important staple for NOS and indeed other public service broadcasters across Europe through the deal

# Dutch people are simply not used to paying for content

between the EBU (European Broadcasting Union) and the IOC (International Olympic Committee). However, the rights for the 2018 to 2024 Games cycle were awarded to Eurosport in June (see pages 86-87) and its parent company Discovery Communications in a deal worth approximately €1.3bn.

"I really didn't see that coming," said Jan de Jong. "Hopefully there will still be an opportunity for NOS to work with Eurosport by localising coverage for the Netherlands audience through focusing on Dutch athletes leaving Eurosport free to concentrate on more multilateral content."

He views the deal as Discovery taking both an offensive position and a defensive one at the same time.

"Offensive in that they obviously want to grow their market share in sports across Europe in key markets for them and defensive in that they might be wary of new players such as Apple and Google emerging on the sports scene. This is their insurance policy for the future in my opinion."

## Eurosport's Orange View

While Discovery is excited about the Olympic deal and what it will bring to the operator's stable, there are still plenty of other sports to be broadcast on Eurosport in the meantime.

"We have a wide variety of sports on offer, but Eurosport is really prominent in a number of pillar sports including cycling, tennis, winter sports, and motor sports," Alco de Jong, country manager of Discovery Networks Benelux, explained.

"We also have a growing number of hours of football and are really pleased to be airing MLS (Major League Soccer), Serie A and Ligue 1 from this season onwards."

According to Alco de Jong, MotoGP is one of the broadcaster's most appealing sports on air. "It has a wide following in the Netherlands and

this season we have already had some terrific results for the sport. For MotoGP we have our own production team and this is really helping to give the production a local and relevant look and feel."

For Eurosport, its main challenges lie in how the broadcaster balances local rights with its international rights and how to schedule in such a way that the audience is able to keep track of its favourite sports and athletes.

"Our main play out is in Paris, but we then have our commentators in Amsterdam and other locations in the Benelux region," Alco de Jong added.

"The Dutch market is a highly advanced and highly competitive television and media market. That also goes for sports and this means that all sports coverage is very mature and state-of-the-art. Everything is in HD so every key player in the market has to adapt to what the viewer expects."

## Tomorrow's World

Next generation technology 4K (deliver four times as much detail as 1080p Full HD) is also a consideration for NOS according to Jan de Jong but feels that the Dutch industry "needs to change its infrastructure as we aren't quite there yet".

When it comes to digital media however, NOS is much more bullish in its investments.

"A lot of our coverage starts with simulcasts on mobile devices and we have developed special apps for sports and also unique content for the internet such as athletes' heart rates and data visualisation," said Jan de Jong

For the Grand Depart, NOS encouraged its viewers to upload their own images to the NOS website so that they could be shown alongside official pictures.

"Social media is very important to us as it drives between 20 and 30 per cent of traffic to our site," he added ■



## IN FOCUS 2016 EUROPEAN ATHLETICS CHAMPIONSHIPS

Next year NOS will be the host broadcaster for Europe's crown jewel athletics event in Amsterdam, which is being turned into a five-day competition event from its previous six-day incarnation in order to maximise attendances and television audiences.

"The European Athletics Championships will be another great challenge for the NOS," said NOS CEO Jan de Jong.

"Dozens of disciplines all being held at the same time in the same stadium. That will make it a bit complicated. So we are going to use more than 70 cameras to make sure very image is fantastic. It will literally be 'Athletics as never seen before' And it all takes place in the most beautiful décors imaginable: the Olympic Stadium, the streets of Amsterdam and the Museumplein."

The public broadcaster will place a crew of 300 people and seven production control cars in the various venues and studios for live programming and also produce over 40 hours of live coverage as well as content for more than 35 international broadcasters ■