

ING GLOBAL CITIES
DIGITAL VISIBILITY SERIES
2019

The World's most talked about cities

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Digital visibility
is *key* for cities
building a
GLOBAL BRAND

Following studies of Europe, the UK and The USA's Most Talked About Cities, ING's new ranking identifies how the World's Top 250 cities feature on social media and online news. In a context of rapid change and constantly evolving networks, curating digital visibility provides powerful opportunities for place branding and potential for urban areas to elevate their profiles.

ING is the *leading*
communications
agency for the
BUILT ENVIRONMENT

At the cutting edge of PR, digital media and wider urban cultural dialogues, ING has an extensive track record of helping cities as diverse as London, Lisbon, Istanbul and Helsinki to thrive in a connected world. Our client portfolio stretches across Europe, North America and the Middle East.

The World's most talked about cities

Hundreds of surveys benchmark cities against almost every aspect of urban life. These rankings influence investment, where talent concentrates and our travel choices. However, there is little comparative research into the impact digital messaging is having on cities as brands.

Responding to this, ING has reordered the World's Top 250 cities, based on global city indices, by their share of the online conversation and provided some analysis on which cities have brand parity, punch most above their weight and show the most potential for increasing their digital profiles.

While each city's digital footprint is unique, the distribution of visibility across the globe follows distinct patterns. Over 50 countries with urban areas of over 300,000 people don't have a city represented in the Top 250. Many of these are concentrated in regions where future urban growth is expected (and particularly in Africa), suggesting competition will increase as the value of places is reassessed, but also emphasising the strategic advantage of capital cities as entry points for nations with limited visibility.

City super brands

– One in every five online mentions for the World's Top 250 cities are about just four cities: Tokyo, New York City, London and Paris. These cities are in the Top 10 across every platform measured, except for Tokyo, which is 17th for Facebook, cementing their positions as the world's super brands.

– Despite using alternative social media tools and censoring some content, China has the most cities (4) in the Top 10, and is particularly strong

on forums and news, followed by the USA (3) and Spain (2).

– Tokyo, Beijing and Rome have the highest percentages of non-English mentions online, suggesting their visibility is more locally concentrated. Unlocking homegrown content for wider appeal may create broader place branding opportunities.

NEWS	INSTAGRAM	TWITTER	FORUMS	BLOGS
1 NEW YORK CITY	1 NEW YORK CITY	1 TOKYO	1 BEIJING	1 NEW YORK CITY
2 BEIJING	2 LONDON	2 NEW YORK CITY	2 SHANGHAI	2 LONDON
3 LONDON	3 PARIS	3 PARIS	3 TOKYO	3 PARIS
4 PARIS	4 DUBAI	4 LONDON	4 HONG KONG	4 TOKYO
5 SHANGHAI	5 MOSCOW	5 MADRID	5 ROME	5 ROME
6 BERLIN	6 ISTANBUL	6 BARCELONA	6 NEW YORK CITY	6 SINGAPORE
7 HONG KONG	7 TOKYO	7 SEOUL	7 PARIS	7 HONG KONG
8 SEOUL	8 LOS ANGELES	8 OSAKA	8 LONDON	8 LOS ANGELES
9 MADRID	9 MIAMI	9 DUBAI	9 SHENZHEN	9 MOSCOW
10 TOKYO	10 JAKARTA	10 ROME	10 OSAKA	10 BERLIN

Category Share for the World's Top 10 cities

The share of conversation topics provides a window into what people are talking about in each city. The shares for the Top 10 cities overall are highly divergent, but also reveal regional patterns.

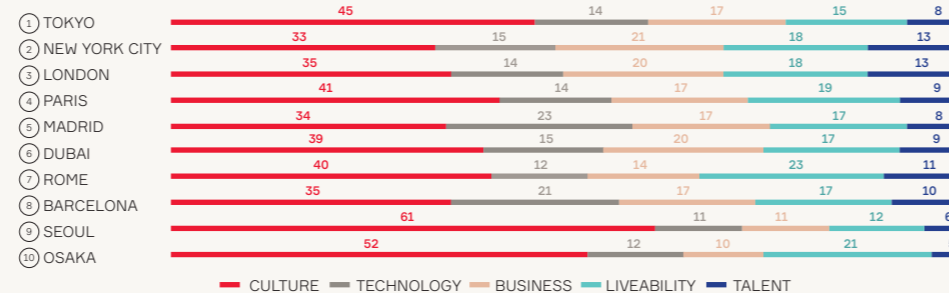
– Seoul, Osaka and Tokyo (like Kyoto) concentrate conversations around culture, with Japanese and South Korean cities recording of the highest shares for culture overall.

– NYC and London's dominance as financial centres is reflected in their higher shares across business and talent categories. This pairing is common to

many business hubs around the world.

– Madrid and Barcelona feature more strongly for technology. Barcelona's transformation of former industrial land into a tightly-knit, integrated knowledge economy is seen as a key case study in how to promote innovation.

– Liveability features the most regularly in conversations about Rome. As with many other European cities, higher liveability shares tend to be matched with higher conversation shares for culture.



Top 10 cities punching above their weight for digital mentions

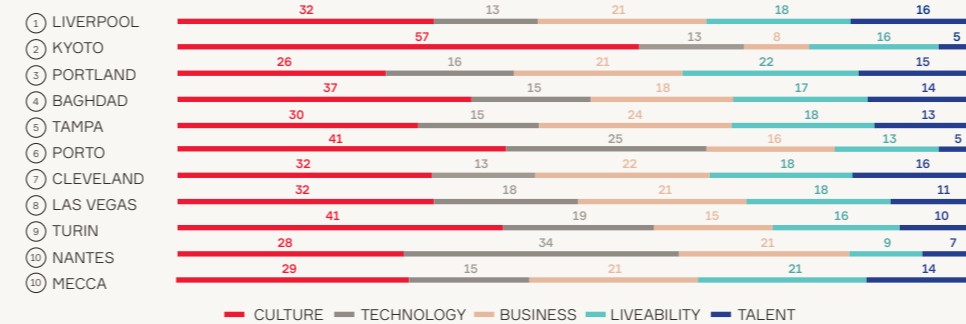
These cities generate significantly more mentions on digital media relative to their positions on city indices, presenting an opportunity to climb the rankings by consistently improving the quality and impact of the conversations about them. Their digital visibility rankings are all over a hundred positions higher than their city rankings.

– Liverpool's online visibility ranking is 196 places higher than its city ranking. Like Cleveland and Tampa, it has a strong pairing of business and talent, and is one of the few UK cities to have doubled its economy over the last two decades.

– Nantes' high share for technology (similar to Lyon) suggests the Métropole French Tech strategy is helping put a spotlight on the city.

– Mecca's relatively higher visibility (as with Jerusalem) reflects the significant global audiences these cities serve. Expanding Hajj attendance – enabled by air and rail – is driving investment and may explain its high liveability and business conversation shares.

– None of these cities perform strongly for more traditional news coverage, except Baghdad and Mecca, but benefit from huge amounts of user-generated content. Turin (123 for digital visibility) is 10th overall for Facebook.



Top 10 cities with the most digital profile potential

Global city rankings highlight these as the cities we should pay attention to, but this doesn't necessarily translate to the digital world, where these cities attract fewer mentions than their peers. These cities, which have digital visibility rankings over a hundred places lower than on city indices, have the most potential to grow their digital profiles by building on their strengths.

– Most of these cities, many benefiting from capital city status, have relatively higher digital visibility on news, suggesting the need to broaden content creation beyond traditional channels.

– Guangzhou, with the highest share for business, bucks the trend of many Chinese cities with relatively stronger visibility on Twitter.

– Bucharest (like the other smaller European centres of Ljubljana, Vilnius and Bratislava), have the strongest shares for culture.

– Kuwait City, which is undergoing a region-wide focus on economic diversification, concentrates conversations around technology and talent, but has the lowest share for liveability overall.

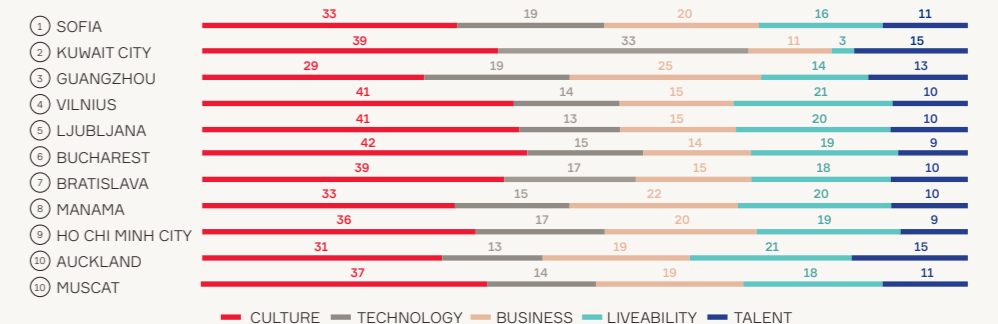
– Auckland's high talent and liveability shares – with relatively higher visibility on forums – reflects the city's quality of life score.

– Vilnius' high liveability score comes at a time when it is encouraging movement from former lower cost centres across Europe.

– All these cities (except for Kuwait) have proportionally higher mentions on Instagram, providing opportunity to elevate brand positioning through strategic storytelling. Ho Chi Minh City in 92nd place (digital visibility 182) has the largest jump.

– Sofia's visibility on Facebook is 129 places higher, however its indistinct name across various languages (as with Phoenix and Austin) limits its overall digital visibility.

– Johannesburg, Africa's highest performing on city rankings, is 99 positions lower for digital visibility.



Comparing visibility between city rankings and online mentions

This chart ranks the world's Top 250 cities by global city indices against digital mentions on social media and online news for the whole of 2018. A downward slope illustrates cities that aren't making the most of their stronger rankings, while a rising gradient highlights the cities with the most opportunity to challenge global city rankings. A horizontal line indicates cities with a brand that aligns most closely across online visibility

and city rankings. The relationship between investment and digital visibility is far stronger than sentiment, which appears to be a poor indicator of a city's potential. London and Lagos, for example, have very similar scores. Content creating links into a city and its opportunities may be more valuable for encouraging positive interaction with cities.

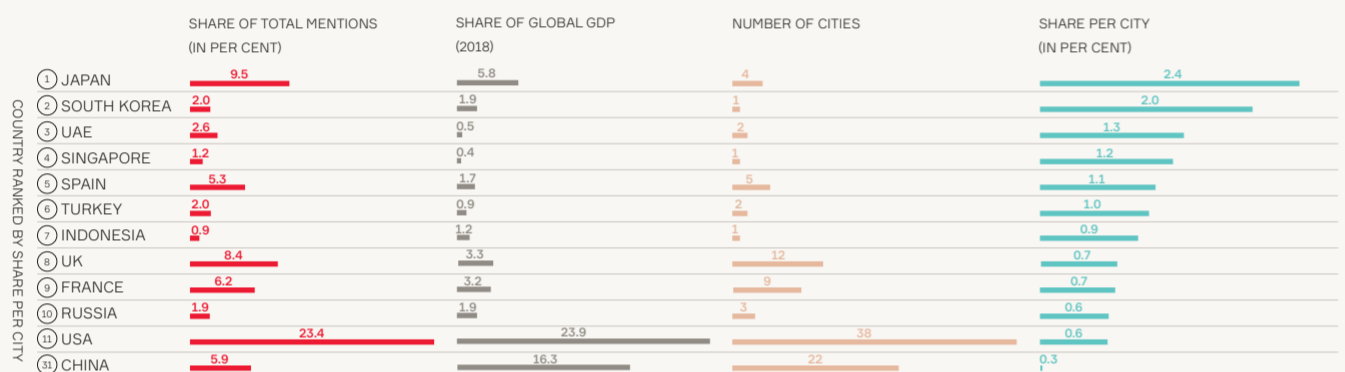
Efficiency of visibility?

Almost a quarter of all mentions are for American cities. The USA is home to more talked about cities (based on their digital visibility) than any other country. During the same period, the US also attracted more foreign direct investment than any other nation. A country's share of digital visibility is positively correlated with their share of global GDP, providing a far stronger indicator of economic potential than sentiment.

China has the second most cities represented. However, the visibility produced by each US and Chinese city is relatively low, with the share per city placing the US in 11th position, followed by China in 31st. Put differently, Europe's Top 40 cities produce 40% more mentions than the USA's Top 40.

Japan (4 cities) and South Korea (1 city) have the most efficient city brands in the Top 250, generating significant visibility from only a handful of cities. This concentration means several large cities in these countries don't feature in this ranking. The positive correlation between number of cities included and share of GDP is even higher, suggesting investing in Tier 2 cities may have a disproportionately greater economic benefit at a national level.

Spain, France and the UK show the strongest correlation between their ranking for share of total mentions and share per city. While the major cities in each are responsible for most of this, the UK's smaller cities have comparatively higher visibility than their peers.



Distribution of visibility and invisibility

The blue dots map the world's Top 250 cities, indicating that digital visibility is most geographically concentrated in Europe. Red dots indicate the biggest city (if over 300,000 people) in 51 countries not represented by the Top 250. These are mostly in Africa, where (along with Asia) almost all urban and population growth is expected coming decades. This growth has not necessarily impacted on visibility yet, leaving Africa's urban centres at a distinct global disadvantage.

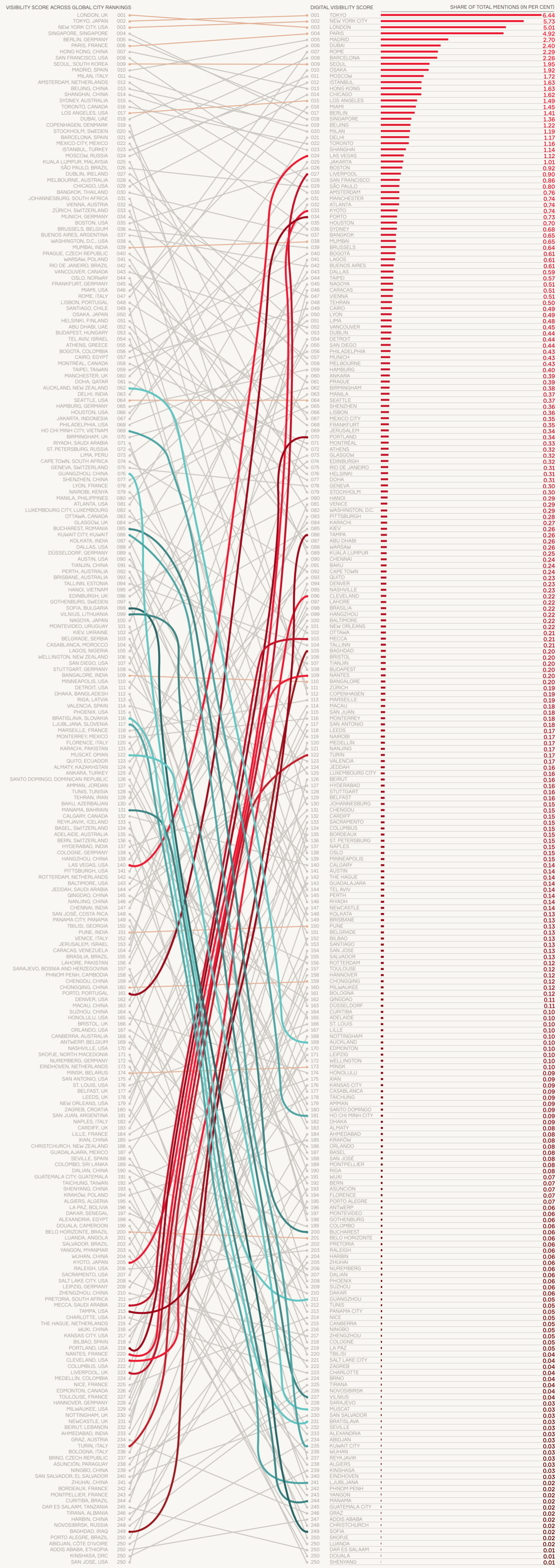


"In a globally competitive world, visibility matters to cities today more than ever before. Yet beyond a handful of key cities we know little about their brand potential. Measuring their digital visibility provides a clearer insight into how cities and major towns perform as brands compared to their regional and global peers."

LEANNE TRITTON
MANAGING DIRECTOR, ING MEDIA

"The World's Most Talked About Cities begins to explore the links between places and digital conversations, and the impact this has on what we consider the best cities. Global benchmarks are just one of the communicative tools that put places on the map; digital visibility helps capture value that may otherwise go unnoticed."

PETER GRIFFITHS
CITY STRATEGIST, ING MEDIA



ING's investigation into The World's Most Talked About Cities covered 751 cities in 168 countries included in a diverse set of 24 publicly available global city rankings. This aggregated list of Top 250 cities appearing on city indices were then ranked by total 2018 digital mentions on Twitter, forums, blogs, news, Tumblr, Facebook, and Instagram (partial data set). Spelling variants were included for English, Chinese (simplified), Spanish, Arabic, Portuguese, Japanese, Russian, German, French, Malayalam, Indonesian, and the city's local language, representing over 90% of total online mentions. Mentions containing sport were limited to 25% of total mentions for all cities. Category shares, generated from a set of keywords unique to each category, represent only English mentions.

TOP 10 CITIES WITH THE MOST DIGITAL PROFILE POTENTIAL | TOP 10 CITIES PUNCHING ABOVE THEIR WEIGHT FOR DIGITAL MENTIONS | CITIES WITH VISIBILITY PARITY

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complex worlds of *property, architecture, design,*
regeneration and culture to help *brands, organisations*
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