

ING GLOBAL CITIES
DIGITAL VISIBILITY SERIES
2020

Europe's most talked about cities

2020

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Europe's most talked about cities

Global surveys rank cities and major towns against almost every aspect of urban life; influencing investment, where talent concentrates, and our travel choices. ING's research, now in its second year, provides insight into the impact digital messaging is having on cities as brands.

Our global exploration into digital visibility highlights that the extent to which people are talking about cities is positively correlated with economic potential at a country level. Increasing awareness of place is one of the single most important measures local and national leaders can take to ensure their cities thrive in our connected world.

ING has identified Europe's Top 50 cities using existing global city indices and reordered them according to their share of the online conversation. We have also provided analysis to show which cities punch most above their weight and which show the most potential for increasing their digital profiles. A snapshot of top trending topics and a comparison of performance between the 2019 and 2020 editions highlight how online conversation patterns are always changing.

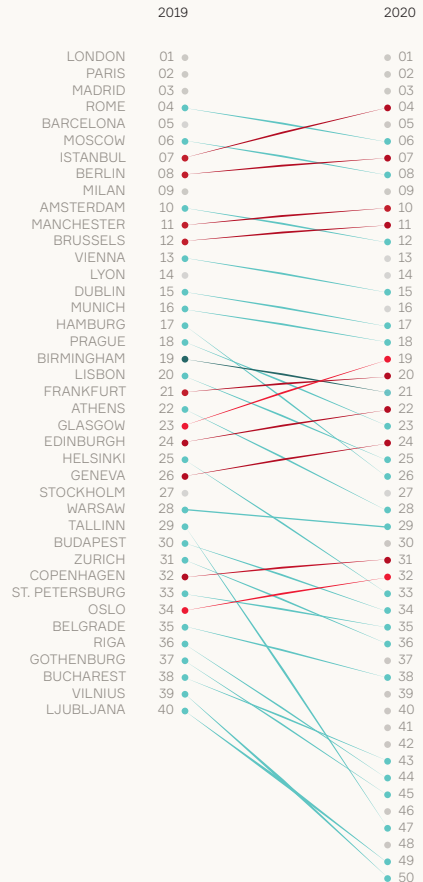
“All cities have significant talent and investment needs, but smaller urban areas may be the biggest winners in using digital conversations to improve their visibility to access new opportunities. The most forward-thinking places are already using a long-term strategy to identify and share their unique story across all forms of media. The challenge is to maintain momentum, while adapting to the ever-changing online environment.”

LEANNE TRITTON
MANAGING DIRECTOR, ING MEDIA

Digital visibility change

2019/2020

Last year, ING introduced a new ranking identifying how Europe's Top 40 cities featured on social media and online news. The 2020 edition expands this to 50 cities. While there is stability at the top of the ranking – with London, Paris, Madrid and Barcelona retaining their positions – there is significant movement lower down as smaller cities gain profile. The addition of two German cities, and one new city from Portugal, Spain, The Netherlands, Poland, and Belgium, suggests smaller cities are leveraging the network potential that exists when strategically connecting conversations with their surrounding cities. It also appears far more difficult to climb the rankings than to drop, highlighting the challenge cities face in consolidating leading positions through a consistent and long-term communications plan.



ING's Top 50 cities by online mentions

SHARE OF TOTAL DIGITAL VISIBILITY (IN PER CENT)

01	LONDON	16.4
02	PARIS	14.2
03	MADRID	7.5
04	ISTANBUL	6.9
05	BARCELONA	6.4
06	ROME	6.0
07	BERLIN	3.8
08	MOSCOW	3.3
09	MILAN	3.2
10	MANCHESTER	2.3
11	BRUSSELS	2.2
12	AMSTERDAM	1.9
13	PORTO	1.8
14	LYON	1.5
15	VIENNA	1.5
16	VALENCIA	1.3
17	DUBLIN	1.2
18	MUNICH	1.1
19	GLASGOW	1.1
20	FRANKFURT	1.1
21	BIRMINGHAM	1.1
22	EDINBURGH	1.1
23	PRAGUE	1.0
24	GENEVA	1.0
25	LISBON	0.9
26	HAMBURG	0.9
27	STOCKHOLM	0.9
28	ATHENS	0.9
29	WARSAW	0.7
30	KIEV	0.6
31	COPENHAGEN	0.6
32	OSLO	0.6
33	HELSINKI	0.5
34	BUDAPEST	0.5
35	ST. PETERSBURG	0.5
36	ZURICH	0.5
37	STUTTGART	0.4
38	BELGRADE	0.4
39	ROTTERDAM	0.4
40	DÜSSELDORF	0.3
41	KRAKÓW	0.2
42	ANTWERP	0.2
43	BUCHAREST	0.2
44	RIGA	0.2
45	GOTHENBURG	0.2
46	BRATISLAVA	0.1
47	TALLINN	0.1
48	SOFIA	0.1
49	LJUBLJANA	0.1
50	VILNIUS	0.1

– London and Paris share almost a third of the online conversation for the Top 50 cities, however, both cities have seen a reduction in visibility since the 2019 edition.

– London leads for mentions on news, Twitter, Facebook, Reddit, YouTube, Instagram, blogs, and reviews and comments. Last year, Paris had the upper hand on social media.

– Berlin, as with other German cities, scores well for digital news coverage. However, comparatively fewer mentions on social media reduce its overall ranking. The same pattern exists for many capitals in Northern and Eastern Europe.

– Valencia, Istanbul, and Barcelona have the highest percentage coverage for social media, but comparatively lower news coverage. Mentions were not inflated in the summer months of higher tourist arrivals.

– Munich performs relatively well on forums (5th overall), Vienna (4th) and Amsterdam (5th) for reviews, and Brussels (4th) for comments.

– Cities featured from Germany (6), the UK (5) and Spain (3) are collectively responsible for almost half of all mentions in the Top 50.

– Countries with more cities ranked highly for digital visibility are more likely to have stronger economic performance.

– Key languages for attracting digital visibility are English and Spanish followed by German, French, Japanese and Arabic.

Top risers and fallers

It is easier to fall than to rise in our digital visibility ranking. Cities fell, on average, three times more positions than for cities gaining. Over time, the relationship between digital visibility and global city rankings appears to converge, underlying the importance of online conversations in improving global city rankings.

- Oslo’s digital visibility gain over last year’s ranking comes alongside a reduction in its global city ranking resulting in closer alignment between both.
- Edinburgh and Geneva (like Glasgow), noted in our 2019 edition for punching above their weight, have seen an increase in both measures.
- Istanbul had most mentions in Turkish, which may explain the limited impact of these conversations on its global city ranking.
- A successful communications campaign, which elevated Helsinki’s digital visibility in our 2019 edition, has been followed by a subsequent fall in 2020. Like Hamburg, however, its global city ranking increased in the following year.
- Cities like Riga, Tallinn, Ljubljana and to some extent Vilnius in countries without other large urban areas, may require regional-level strategies to compete against nations more able to pool their digital visibility across a local network of cities.

CHANGE IN DIGITAL VISIBILITY RANKING	
+4 GLASGOW	-18 TALLINN
+3 ISTANBUL	-11 VILNIUS
+2 EDINBURGH	-9 LJUBLJANA
+2 GENEVA	-9 HAMBURG
+2 OSLO	-8 GOTHENBURG
	-8 RIGA
	-8 HELSINKI

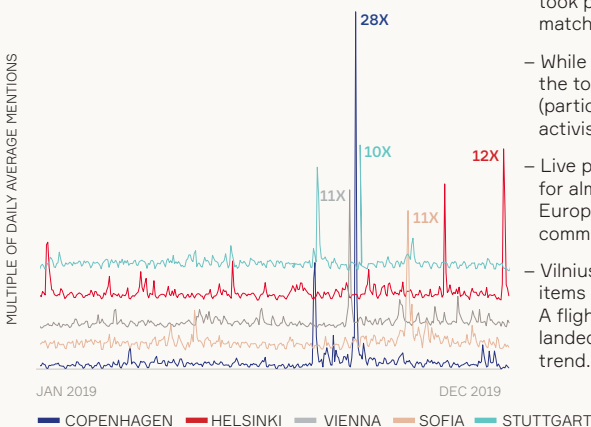
Top trending topics

Unlike last year’s survey, sport no longer dominates conversations in cities. Peaks were more likely to take place for political and cultural activities.

- Copenhagen, Helsinki, Amsterdam, Milan, Berlin and Vienna trended after digital mentions linked to Korean boy bands went viral. A Canadian band

led to similar spikes in Kraków, Antwerp, Zurich and Stockholm.

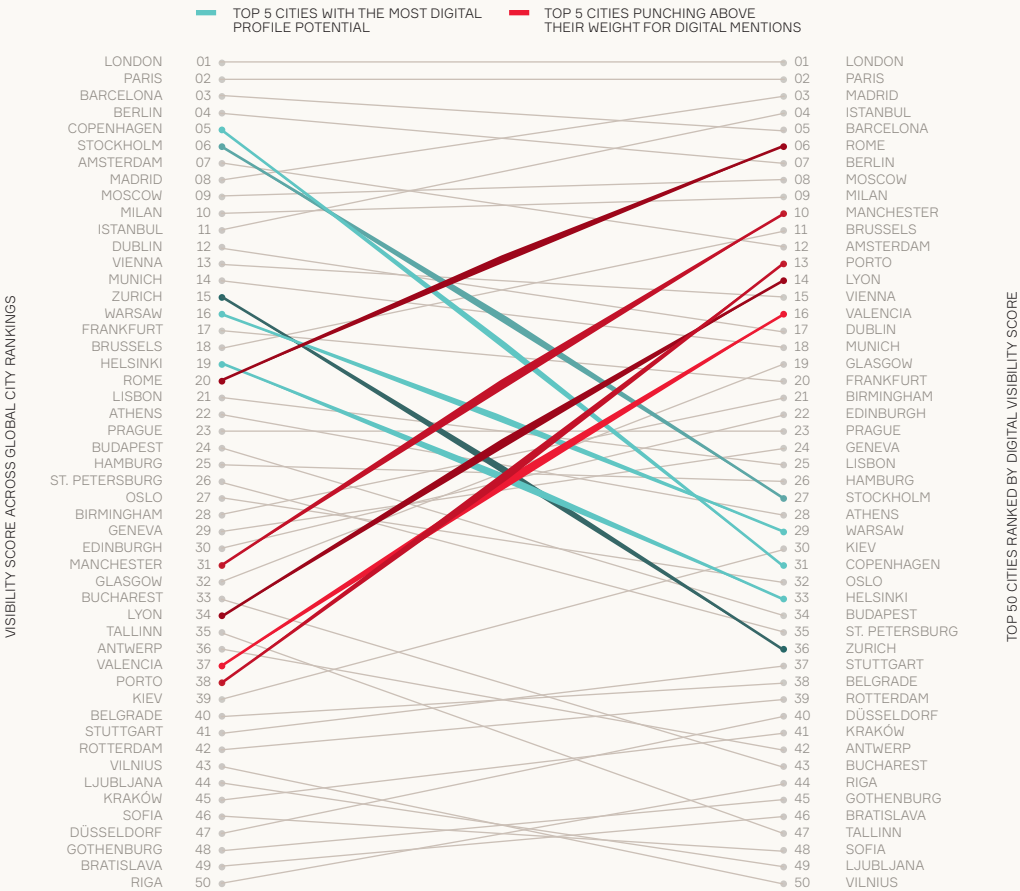
- Stuttgart’s peak is one of the few directly related to a city’s industrial capacity: the global launch of an all-electric Porsche.
- Almost a third of top mentions for sport related to antisocial behaviour, as with racist incidents that took place during a Bulgaria v England football match in Sofia. Kiev’s spike was for similar reasons.
- While politics doesn’t feature in the Top 5, it was the top trending topic across most cities. Crisis (particularly the fire at Notre Dame in Paris) and activism, often around climate, featured strongly too.
- Live programmed events remained responsible for almost half of all the top trending content in Europe’s Top 50 cities, underlining their strategic communication value.
- Vilnius airport’s Christmas tree made of confiscated items was the best example of creating viral content. A flight scheduled for Düsseldorf that accidentally landed in Edinburgh was the most peculiar topic to trend.



Comparing visibility between city rankings and online mentions

This chart ranks the Top 50 European cities by visibility on global city indices against total digital mentions. A downward slope illustrates cities that aren't necessarily making the most of their stronger rankings, while a rising gradient highlights the cities with the most opportunity to challenge global city rankings. While only London, Paris, and Prague have

the same ranking for both city ranking and digital visibility, a tight correlation between the two, and the influence digital visibility recorded in the 2019 edition appears to have on the updated city rankings suggest what people are talking about online impacts place branding.



ING Media's investigation into *Europe's Most Talked About Cities (2020 edition)* covered 276 cities in 53 countries included in a diverse set of 29 publicly available global city rankings. This aggregated list of Top 50 cities appearing on city indices were then ranked by total 2019 digital mentions on Twitter, forums, blogs, news, Reddit, Facebook, Instagram (partial data set), comments and reviews. Spelling variants were included for English, Chinese (simplified), Spanish, Arabic, Portuguese, Japanese, Russian, German, French, Malaysian, Indonesian, and the city's local language, representing over 90% of total online mentions. Mentions containing sport were limited. Category shares, generated from a set of keywords unique to each category, represent only English mentions.

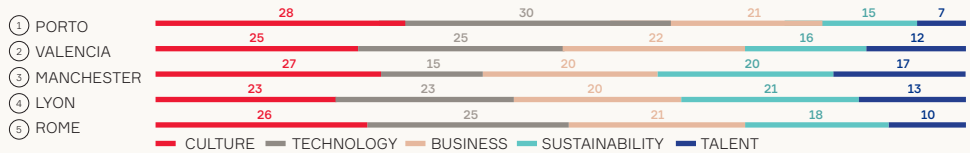
Top 5 cities punching above their weight for digital mentions

These cities generate significantly more mentions on digital media relative to their positions on city indices. This presents an opportunity to climb the rankings by consistently improving the quality and impact of the conversation about them. Their category shares show significant variance, highlighting areas these cities can potentially consolidate a lead in.

- None of the Top 5 cities perform strongly for more traditional news coverage, except Rome, but benefit from huge amounts of user-generated content that tends to be more positive than for most other European cities. Rome is top for forums, the only platform London doesn't lead.
- Lyon's digital visibility, which punched the most above its weight in the 2019 edition, is no longer

driven by conversations around technology. Porto, which also leads the Top 5 for culture, now has the highest share for this category.

- Porto, which has continued to gain profile, was noted in the previous survey for having far higher digital visibility than its global city ranking would suggest.
- Lyon now has a comparatively higher share of conversations happening around sustainability, indicating the growing significance of this topic.
- Manchester's high talent share, as was the case in 2019, may be indicative of sustained population and jobs growth.
- Valencia, a new entrant (like Porto) leads conversations for business.

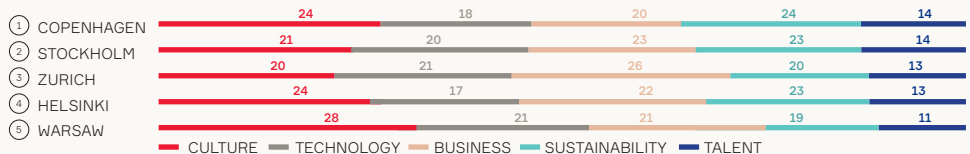


Top 5 cities with the most digital profile potential

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 have the most potential to grow their digital profiles by leveraging their strengths more strategically. Cities that don't are more likely to see a reduction in their visibility score in global city rankings.

- Copenhagen, Stockholm and Helsinki all have raised numbers for sustainability, highlighting the Nordic region's credentials. However, London and Paris have comparable shares to Copenhagen. As this topic becomes more mainstream, places with a strong history of sustainability may need to find new ways of differentiating.

- Helsinki, which replaces Oslo, is the only city in this list that didn't appear last year.
- Warsaw continues to lead for culture and, with Zurich, has the highest share for technology.
- Zurich, perhaps unsurprisingly, has the highest share for business. However, it also has one of the lowest digital conversation shares for culture, while other financial capitals have seen far greater divergence in conversation topics since last year's edition.



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