The Saffron European City Brand Barometer.

Revealing which cities get the brands they deserve.

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Saffron

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Why a European City Brand Barometer?

Having advised countries, regions and cities on their branding, we at Saffron are interested in what factors influence a place's brand. The impact of EU enlargement, easier travel, and a rediscovery of regional identity and cultures is intensifying competition among European cities for a share of international tourism, trade and investment. How successfully these cities project their assets and attractions is fundamental to their future success.

We wanted to conduct a piece of research that would compare and contrast place brand strengths, and we felt that cities offered the best route. The European City Brand Barometer offers a valid yardstick, revealing how cities stack up against one another, brand-wise.

The Barometer thus measures the strength of cities' brands and assesses how well cities use branding to exploit their assets. We find that while some cities' brands are underperforming relative to their innate qualities, others are punching above the weight of what they have to offer.

So what are the most important factors that determine a city's image? Saffron concludes that there are ten qualitative factors (the Saffron city brand criteria) a city should work on if it wants to improve its standing in the world.

02
What we mean by 'brand'—and why it matters.

First of all, let's define some terms. A brand is an overall image or set of perceptions and associations that resides in people's heads. When we speak of 'the brand' of a place, we mean the average or common perceptions and associations people have with that place; it is always an approximation, and it is always subjective. Reasonable people can thus disagree about 'the brand' of a particular place, but it is still meaningful.

A city's brand, although hard to pin down exactly, derives from factors which can be usefully, if subjectively, measured and evaluated. Certain assets, such as a vibrant cultural scene or renowned architecture, tend automatically to confer strength on a city brand. Such attributes give certain cities, like London and Rome, a 'head start' in the branding race, while others,

such as Warsaw or Bradford, begin at a natural disadvantage. Other cities, like Dublin or Glasgow, are somewhere in the middle in terms of their attributes but have succeeded in forging strong brands.

Which leads us to 'brand*ing*'. Branding means the deliberate actions taken to alter or improve an image. This includes promotion but mostly, in our experience, it means improvement and coordination.

It entails a place gathering its leaders together, actually or figuratively, and in effect deciding, "We've got these assets to work with and these liabilities to correct. Let's get to it." An organised and official 'branding programme' of the sort we consult on, when done right, is far and away the most effective—and certainly the most formal—method for a city to achieve a shift in its brand sooner rather than later. But there are other ways for it to happen, some of which are more spontaneous or accidental than others.

Brands matter because they're what people base their decisions on: decisions about where to live, where to go on holiday, where to set up a business, even (albeit perhaps to a lesser degree, or at least in a different way) where to invest.

Brand = substance + feeling.
Brand = reality + story.
Brand = truth + imagination.
Brand = fact + impression.

Indeed, sometimes it seems we'll forgive a city anything provided it's sexy and going there gives us something to talk about when we get home. And at the other end of the spectrum, if we don't know about a place, if there's no story there for us, then we make assumptions about how interesting or prominent or attractive it is.

03

What we looked at in the study.

We looked at European cities with populations of 450,000 or more, plus Manchester, Bristol, Cardiff, Leeds and Newcastle, (important UK cities with populations less than that). Altogether there are 72 cities in our analysis.

Our analysis looks at two different qualities:

01 – <u>City asset strength</u> (which asks: looking only at the observable and measurable features of the city how strong could the city's brand be?)

02 – <u>City brand strength</u> (which asks: right now, how strong is the city's brand really?)

01 – City asset strength
City asset strength represents a city's baseline brand potential by telling us how a city fares against the things that people most want in a city.

Saffron conducted a poll to discover what the most desirable assets in a city were and then analysed how each city measures up against these desired assets. The assets combine the 'soft' cultural factors and 'harder' amenity factors that people want from a city. Saffron also included the degree to which the city is important or prosperous economically.

To determine what people want most in a place, Saffron commissioned a YouGov poll of 2,000 people in the UK. We asked two questions with a series of multiple choice answers:

Cultural factors:
When considering a city break, which of the following things are most important to you? (respondents were asked to choose 3 and rank them in approximate order of importance)

Amenity factors:
If you were considering a city break, what kind of city might appeal to you the most? (respondents were asked to choose 3 and rank them in approximate order of importance)

The most desirable assets in order of weighted importance, were:

Cultural:
1. sightseeing and historical attractions
2. cuisine and restaurants
3. friendly and helpful locals
4. good shopping

Amenity:
1. particularly low cost
2. good weather
3. ease of getting around on foot or by public transport

02 – City brand strength

How strong is a city's brand right now? Because a brand lives in the heads of millions of people, it is not actually measurable as a uniform entity. And like Marmite, there is no 'average view' that you can discern meaningfully; some love it, some hate it, some have never tasted it. But just as you can infer something about the popularity of Marmite by seeing how well it sells, you can also make an educated guess about how a city is generally perceived.

We chose four factors, equally weighted, to include in our Barometer of a city's current brand strength. These are subjective in that they are Saffron's chosen factors but they are based on our extensive place branding experience, and we believe they are valid:

01 – Pictorially recognised meaning, could many people recognise the city from a postcard without having to read the description on the back.

02 – Quantity/strength of positive/ attractive qualities meaning, what prompted and unprompted associations do people have of the city.

03 – Conversational value meaning, how interesting would it be at a cocktail party to say, "Hey, I just got back from _____.").

04 – Media recognition, which we determined statistically by counting media references to the city over a set period.

Scoring and outputs

We calculated city asset strength (to a maximum of 100) and city brand strength (also to a maximum of 100). With these scores we created the European City Brand Barometer, which yielded a set of quantitative results:

– City brand strength: reveals the brand score and ranking for each of the 72 cities
– City asset strength: shows the asset score and ranking for each of the 72 cities
– Brand utilisation: reveals quantitatively how well the cities are living up to their brand potential (by calculating brand strength as a percentage of asset strength for each city).

The quantitative data was then used to create a visual interpretation of the results:
– The City Brand Barometer: graphical illustration of how the cities match up against one another (by plotting city brand strength versus city asset strength on an X-Y grid).

04
The results and what they show.

See the appendix for full tables of results and visual illustration, The European City Brand Barometer.

Cities get the brand they deserve…mostly

The findings support the intuitive assumption that the stronger a city's assets, the stronger its brand. The linear, positively sloping curve revealed on the Matrix seems to prove exactly what you would think: that by and large, cities get the brands they deserve. What's interesting, however, is where this is not the case.

Indeed, the Barometer shows that some cities, much like undervalued stocks, seem to have a reality (city asset strength) that is more attractive and of higher quality than is currently accounted for in their brand (city brand strength).

Two cities whose brands appear metaphorically undervalued, for example, are Sofia, Bulgaria and Lisbon, Portugal. Sofia has the same asset score as Edinburgh, Scotland, yet a brand strength score of just 30 versus Edinburgh's 75.

Meanwhile Lisbon has the same asset score as Berlin (70), yet only some 65% of the German capital's brand strength.

Other cities with less potential than Sofia and Lisbon but who utilise their brand potential even less than those two cities are Wrocław, Poland and Vilnius, Lithuania. These latter two cities appear to be using only about 50% of their brand potential right now.

Needed: better branding

Vienna, according to the Barometer, is the only European city to have exactly the brand it deserves: its brand utilisation score is 100%. Almost half the cities in the Barometer are utilising less 80% of their brand potential given their current actual level of attractiveness.

What does this mean? It suggests that higher awareness and better salesmanship should be able to help many cities, particularly 'hidden gems' like Sofia, Lisbon, Wrocław and Vilnius to emerge as much more prominent than they are—in other words, to better utilise their brand potential.

Our belief is that active branding should in most cases be able, in time, to push a city's brand utilisation closer to, or even beyond, 100%.

Earn your reputation, then dine out on it

Another interesting finding of the Barometer is that there is a category of cities whose brand strength actually exceeds what their asset strength would suggest they 'deserve'. In terms of how strong a city's brand is compared to the city's underlying assets—what we're calling brand utilisation—the winner is Berlin, followed by Stockholm, Liverpool, Prague and Amsterdam.

Berlin has a 137% brand utilisation rate; Stockholm 118%; Prague, Liverpool and Amsterdam 115%; Barcelona 112%; and Paris 111%. For all of these cities, their brand is better than their assets would predict (even if the assets are strong), meaning they are selling a story above and beyond an urban experience.

What does this mean? If you are a city with an over 100% utilisation rate, it means you are successfully selling your image as well as a reality. It means that through your history and culture you have fostered an aura about you.

Aside from Liverpool, all of the cities in this category have a good reality (high asset ranking), suggesting it's hard to sell a story without having the attributes to support it. Indeed, one of the issues the Barometer raises for the place branding profession—to put it in old-fashioned marketing terms—is how do you sell an underappreciated sizzle when the steak is good but not as good as others?

One conclusion we make here is counterintuitive: that perhaps the best way for a city to raise its brand, even when lack of awareness is the problem, is not by communications (the standard direct method of raising awareness) but in fact by increasing its attractiveness. In other words, the best way to improve your image is to keep improving your reality.

Use it or lose it

On the other hand, the cities at the bottom of the brand utilisation ranking—suggesting they have more to offer than they are currently being credited for in their brand—are Wrocław (Poland), Vilnius (Lithuania) and Sofia (Bulgaria).

These 'hidden gems' have the innate qualities to attract tourism and business but are underselling their potential. Other cities before them have latched on to the need to pursue branding to realise their potential: Barcelona is the leading example of a city that has got its leaders together and focused on what it wants to be known for by improving its assets and exploiting what it already had. To a lesser extent Liverpool is successfully doing this—it's decided it wants to be a hip city and it has a plan to achieve it. Achieving status as European Capital of Culture in 2008 was a big step in the process.

Don't be surprised if you hear more about Wrocław, Vilnius (European Capital of Culture in 2009) and Sofia in the coming months and years as, aided by more sophisticated branding, people catch on to their charms.

05

How to boost your brand—the Saffron city brand criteria.

We have thought about and debated the factors we think are most important in determining a city's image. We have boiled these down to ten criteria: the Saffron city brand criteria.

The criteria identify perspectives on a place. Like a Cubist painting, sometimes these perspectives overlap, showing more than one facet, more than one aspect of a place, simultaneously. Traditionalists would classify this taxonomy as flawed since the categories are not all mutually exclusive. For instance, London's Underground scores points for London in three categories: distinctive sense of place, easy/access/comfort, and current recognition.

But by recognising the overlapping nature of perception, Saffron's model is more robust, creating a natural sense of weighting that corresponds to the way people actually experience the cities they visit (for business or pleasure or education) and live in. Indeed, in our view, all in all, these ten criteria—overlapping just as they are—are the perspectives that matter.

A city that wants to improve its standing in the world should work on the criteria where it fares poorly.

The ten Saffron city brand criteria are:

01 – Pride and personality of its people
If the folks who live there think it's the greatest city in the world, that counts for something even if many visitors wouldn't agree. On the other hand, places where the people are down on themselves and down on their place…well, that's just a downer, and it tends to affect everything about the visitor's experience, even if in subtle ways.

02 – Distinctive sense of place (on the ground)
Place markers and landmarks, like London's double-decker buses and black cabs, Paris' wide boulevards, Barcelona's Gaudi architecture…any un-ignorable signs while you're there and you couldn't possibly be anywhere else. This covers culture and people, architecture, and natural or built features (e.g. Amsterdam's canals).

03 – Ambition/vision (policy) and business climate
A rising tide lifts all boats. Big plans, big investment, economic incentives, and true prospects for growth. Also, governance: places that make it are often well-governed. Including ease and profitability of doing business. *Example:* Budapest is hurt by the fact that it's in Hungary and Hungary's development has been slow.

04 – Current recognition and perceptions
This is similar to 'momentum' in stock-picking; and like a stock, a place going somewhere will already be showing signs of getting there. Are there independent guidebooks? Helpful press (notice we don't say positive press…anything helpful will do, thank you). Are their obvious or even must-have souvenirs? Is there a big event or fair there (e.g. Oktoberfest in Munich) that lots of people know about?

05 – Worth going to see (the Samuel Johnson test)
Samuel Johnson said about the Giant's Causeway in Northern Ireland: "Worth seeing? Yes. But not worth going to see."

06 – Ease, access and comfort
Riga would score higher than Vilnius because it has easyJet flights. Many things under distinctive sense of place may register under this category also.

07 – Conversational value (the 'cocktail party' factor)
Is it going to be fun to talk about when I get home? Sofia: maybe not, because nobody's heard of it. Paris: maybe (on the one hand, it's not remotely exotic or uncharted, on the other hand people will have their own Paris stories to share).

08 – Locational context and value (how much is it worth simply because it is where it is?)
What this means really depends on the place. It could mean economic importance or the fact that the city is a capital city. It could be that it's close to other interesting places. Or it could be that the city's isolation is played as an asset.

09 – Attractions and anomalies
Things you won't find anywhere else, things that are quirky or exotic. This could be significant attractions, or simply a pervading sense of exoticism in the air. We will 'go quant' on this factor, looking at number of restaurants, 24-hour diners, business opening hours, etc.

10 – "Ooh, I could live here!" (the Barcelona effect)
Some places undoubtedly have this effect on people. It's an unnameable X factor that captures a wealth of place attributes in one fell swoop —a single, bottom-line net present value on the experience of being in a place.

Appendix 1
The full results.

The European City Brand Barometer—results table:

The tables opposite display the individual brand strength, asset strength and brand utilisation scores for each city and how the cities ranked out of 72 for each measurement:

Brand strength

Average score 60

Rank	City	Score
1	Paris, France	89
2	London, UK	88
3	Munich, Germany	86
3	Barcelona, Spain	86
4	Amsterdam, Neth	83
5	Rome, Italy	79
6	Milan, Italy	77
6	Vienna, Austria	77
7	Madrid, Spain	75
8	Athens, Greece	73
9	Frankfurt, Germany	72
9	Stockholm, Sweden	72
9	Antwerp, Belgium	72
9	Prague, Czech Republic	72
10	Oslo, Norway	71
11	Berlin, Germany	70
11	Lisbon, Portugal	70
12	Naples, Italy	69
12	Dublin, Ireland	69
13	Hamburg, Germany	68
13	Palermo, Italy	68
14	Edinburgh, UK	67
14	Hannover, Germany	67
14	Stuttgart, Germany	67
14	Sofia, Bulgaria	67
15	Dresden, Germany	66
15	Copenhagen, Denmark	66
16	Bremen, Germany	65
16	Seville, Spain	65
17	Nurenberg, Germany	64
17	Turin, Italy	64
18	Genoa, Italy	63
18	Kraków, Poland	63
18	Valencia, Spain	63
19	Thessaloniki, Greece	62
20	Bucharest, Romania	61
20	Wrocław, Poland	61
20	Cologne, Germany	61
20	Düsseldorf, Germany	61
21	Leipzig, Germany	60
21	Málaga, Spain	60
22	Budapest, Hungary	59
23	Helsinki, Finland	58
23	Cardiff, UK	58
24	Essen, Germany	57
24	Riga, Latvia	57
25	Glasgow, UK	56
25	Manchester, UK	56
25	Marseille, France	56
26	Gothenburg, Sweden	54
26	Zagreb, Croatia	54
26	Vilnius, Lithuania	54
26	Zaragoza, Spain	54
27	Bratislava, Slovakia	53
28	Rotterdam, Neth	52
28	Warsaw, Poland	52
29	Bristol, UK	51
30	Belfast, UK	50
31	Sarajevo, Bosnia	49
31	Sheffield, UK	49
32	Dortmund, Germany	48
32	Łódź, Poland	48
32	Poznań, Poland	48
33	Belgrade, Serbia	47
33	Leeds, UK	47
34	Birmingham, UK	46
34	Liverpool, UK	46
35	Duisberg, Germany	44
36	Newcastle, UK	43
37	Gdansk, Poland	39
37	Chişinău, Moldova	39
38	Bradford, UK	29

Asset strength

Average score 59

Rank	City	Score
1	Paris, France	99
2	London, UK	97
3	Barcelona, Spain	96
3	Berlin, Germany	96
3	Amsterdam, Neth	96
4	Munich, Germany	87
5	Stockholm, Sweden	85
6	Prague, Czech Republic	83
7	Rome, Italy	81
8	Athens, Greece	80
9	Madrid, Spain	77
9	Vienna, Austria	77
10	Milan, Italy	75
11	Dublin, Ireland	74
12	Edinburgh, UK	70
13	Frankfurt, Germany	67
14	Copenhagen, Denmark	65
14	Hamburg, Germany	65
15	Stuttgart, Germany	64
16	Oslo, Norway	60
17	Lisbon, Portugal	59
18	Valencia, Spain	58
19	Glasgow, UK	56
19	Naples, Italy	56
20	Budapest, Hungary	55
21	Málaga, Spain	54
21	Helsinki, Finland	54
22	Liverpool, UK	53
23	Cologne, Germany	51
23	Dresden, Germany	51
23	Essen, Germany	51
24	Turin, Italy	50
24	Belfast, UK	50
24	Manchester, UK	50
25	Zaragoza, Spain	49
25	Palermo, Italy	49
26	Warsaw, Poland	48
26	Seville, Spain	48
27	Antwerp, Belgium	47
28	Hannover, Germany	45
28	Bristol, UK	45
29	Marseille, France	44
29	Bucharest, Romania	44
29	Kraków, Poland	44
29	Birmingham, UK	44
30	Rotterdam, Neth	43
30	Sarajevo, Bosnia	43
30	Leipzig, Germany	43
30	Newcastle, UK	43
31	Genoa, Italy	42
32	Düsseldorf, Germany	41
32	Thessaloniki, Greece	41
33	Cardiff, UK	40
34	Bremen, Germany	39
35	Nurenberg, Germany	38
35	Belgrade, Serbia	38
36	Riga, Latvia	37
37	Bratislava, Slovakia	36
38	Gdansk, Poland	35
38	Gothenburg, Sweden	35
39	Dortmund, Germany	34
40	Zagreb, Croatia	33
40	Wrocław, Poland	33
41	Leeds, UK	31
42	Sofia, Bulgaria	30
43	Sheffield, UK	29
43	Poznań, Poland	29
43	Łódź, Poland	29
44	Vilnius, Lithuania	28
45	Duisberg, Germany	27
45	Chişinău, Moldova	27
46	Bradford, UK	22

Brand utilisation

Average score 91

Rank	City	Score
1	Berlin, Germany	137%
2	Stockholm, Sweden	118%
3	Prague, Czech Republic	115%
3	Liverpool, UK	115%
3	Amsterdam, Neth	115%
4	Barcelona, Spain	112%
5	Paris, France	111%
6	London, UK	110%
6	Athens, Greece	110%
7	Dublin, Ireland	107%
8	Edinburgh, UK	104%
8	Madrid, Spain	104%
9	Rome, Italy	102%
10	Munich, Germany	101%
10	Belfast, UK	101%
10	Glasgow, UK	101%
11	Vienna, Austria	100%
12	Copenhagen, Denmark	99%
12	Newcastle, UK	99%
13	Milan, Italy	97%
14	Stuttgart, Germany	96%
14	Birmingham, UK	96%
14	Hamburg, Germany	96%
15	Frankfurt, Germany	93%
15	Helsinki, Finland	93%
15	Warsaw, Poland	93%
15	Budapest, Hungary	93%
16	Valencia, Spain	91%
16	Málaga, Spain	91%
16	Zaragoza, Spain	91%
17	Manchester, UK	89%
17	Gdansk, Poland	89%
17	Bristol, UK	89%
17	Essen, Germany	89%
18	Sarajevo, Bosnia	86%
19	Lisbon, Portugal	85%
19	Oslo, Norway	85%
20	Rotterdam, Neth	83%
20	Cologne, Germany	83%
21	Naples, Italy	82%
22	Belgrade, Serbia	80%
23	Marseille, France	79%
24	Turin, Italy	78%
25	Dresden, Germany	77%
26	Bradford, UK	76%
27	Seville, Spain	75%
28	Bucharest, Romania	73%
29	Palermo, Italy	71%
29	Dortmund, Germany	71%
29	Leipzig, Germany	71%
30	Chişinău, Moldova	70%
30	Kraków, Poland	70%
30	Cardiff, UK	70%
31	Bratislava, Slovakia	68%
31	Düsseldorf, Germany	68%
32	Hannover, Germany	67%
32	Genoa, Italy	67%
33	Leeds, UK	66%
33	Thessaloniki, Greece	66%
33	Riga, Latvia	66%
34	Antwerp, Belgium	65%
35	Gothenburg, Sweden	64%
36	Duisberg, Germany	62%
37	Bremen, Germany	60%
37	Poznań, Poland	60%
37	Zagreb, Croatia	60%
37	Łódź, Poland	60%
37	Sheffield, UK	60%
38	Nurenberg, Germany	58%
39	Wrocław, Poland	53%
40	Vilnius, Lithuania	52%
41	Sofia, Bulgaria	45%

The European City Brand Barometer
showing 41 of 72 cities

City brand strength (vertical axis)
City asset strength (horizontal axis)

100

Paris
London
Berlin   Amsterdam   Barcelona

Munich

Stockholm
Prague
Athens   Rome
Madrid   Vienna
Milan
Dublin

Edinburgh

Frankfurt

Liverpool
Belfast
Warsaw

Birmingham
Newcastle   Sarajevo   Rotterdam

Cardiff
Riga

Belgrade

Bratislava
Gdansk   Dortmund   Gothenburg   Wrocław
Zagreb

Leeds
Poznań   Łódź   Sofia
Chişinău   Duisberg   Sheffield   Vilnius

Bradford

20

25   100

18   19

Appendix 2 Underlying methodology.

Saffron's European City Brand Barometer is the result of applied survey research, qualitative desk research, and professional judgment and experience, all of it interpreted by Saffron in a way that is methodical and evenhanded.

City asset strength—weightings, sources and explanations

Saffron used a variety of authoritative research sources to score each city against each of the seven factors that make up asset strength. To maintain consistency, the same set of sources was used to score each city.

01 – Sightseeing and historical attractions (20%). Experience and research. To a degree, we also factored in the physical charm of a place, since our view is that people regard that as an attraction in itself.

02 – Cuisine and restaurants (15%). Experience and research. High scores went to cities with particularly good food on offer or special native cuisines that we regard as particularly worthwhile gastronomically; low scores went to cities with nothing awfully special to offer the visitor in terms of eating, even though a number of good restaurants might be found there. Cost was not considered here.

03 – Easy to get around on foot and public transport (15%). Experience and research. The main idea is: can a foreigner see everything he'd want to see in the city easily, in English, without having to rent a car. Most cities on this list did pretty well in this area because they are compact, at least in the centre, European cities.

04 – Costs very little to enjoy (10%). Experience and data. Poll respondents suggested that at least for a short break, something they put a lot of value on is that a place is cheap. We used price indices and our own experience to gauge the costliness of these cities.

05 – Has good weather (10%). Experience and data. With this we wanted to elicit the degree to which weather was an asset or a liability for a place. So, having extremes of heat or cold, which makes seasonality a factor, is not a good thing.

06 – Shopping (10%). Experience and research. Quality and variety, but not costliness, were taken into account. We relied on our own familiarity with these cities for this one.

07 – Economic significance or prosperity (20%). We looked at GDP per capita, but also at the importance of a city in its context.

City brand strength—weightings, sources and explanations

The first three were "sense of Saffron" metrics, which decided on and scored by Saffron's panel of experts. These are of course subjective but are based on informed, methodical and even-handed evaluation.

01 – Quantity/strength of positive/ attractive associations (25%).

02 – Pictorially recognised (the postcard test) (25%).

03 – Conversational value (25%).

The fourth factor that constituted brand strength was a purely statistical count of press mentions of each of the cities.

04 – Media recognition (25%).