RESONANCE

PLACE BRANDING

ABOUT US

Resonance Consultancy is a global advisor on real estate, tourism and economic development for countries, cities and communities around the world.

RECENT PROJECTS

Vancouver Economic Development Branding

Cincinnati Destination Development Strategy

Ireland Regional Branding

Tulsa Regional Branding

Portland Tourism Master Plan

Montreal Destination Assessment

Copenhagen Competitive Identity Benchmarking

Calgary East Village Branding

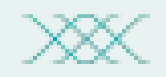# PLACES ARE OUR PASSION

PLACES INSPIRE US

PLACES
CREATE
ENERGY

PLACES
CREATE
CONNECTIONS

PLACES
CREATE
PROSPERITY

HOW DO YOU MEASURE THE QUALITY AND COMPETITIVE IDENTITY OF ONE PLACE TO ANOTHER?

RESONANCE CONSULTANCY HAS ANALYZED AND BENCHMARKED MORE THAN 400 CITIES IN AN EFFORT TO ANSWER THIS QUESTION.

THE BRAND OF A CITY

1. WHAT IS PLACE BRANDING?

WHAT IS PLACE?

WHAT IS PLACE?

NATIONS

STATES

REGIONS

CITIES

NEIGHBORHOODS

PLACES OF ALL SIZES COMPETE FOR TALENT, TOURISM, AND INVESTMENT

PLACE

The perceived identity of a place has historically been defined by hardware: attractions, landmarks, geography, or industries.

DETROIT

MACAU

ROME

VANCOUVER

BUT THE MORE FREELY PEOPLE AND CAPITAL MOVE AROUND THE WORLD, THE MORE IMPORTANT A CITY'S IDENTITY OR "BRAND" BECOMES IN DETERMINING WHERE TALENT, TOURISM, MEETINGS AND INVESTMENT FLOWS.

WHAT IS BRAND?

ESTIMATED VALUE OF COCA-COLA'S "BRAND" IS $69.7 BILLION

– Interbrand 2017

BRAND EQUITY

Brand Equity is "the set of assets and liabilities linked to a brand's name and symbol that adds or subtracts from the value provided by a product or service to a firm and/or that firm's customers."

– David Aaker, Managing Brand Equity

THE IDENTITY OF A PLACE IS SHAPED BY MANY MORE DIMENSIONS THAN THAT OF A CONSUMER PRODUCT OR SERVICE.

A PLACE
TO LIVE

A PLACE
TO DO BUSINESS

A PLACE
TO VISIT

PLACE EQUITY

Place Equity is the set of assets and liabilities linked to a place's name and identity that adds or subtracts from the perceived attractiveness of a community as a place to live, visit and invest.
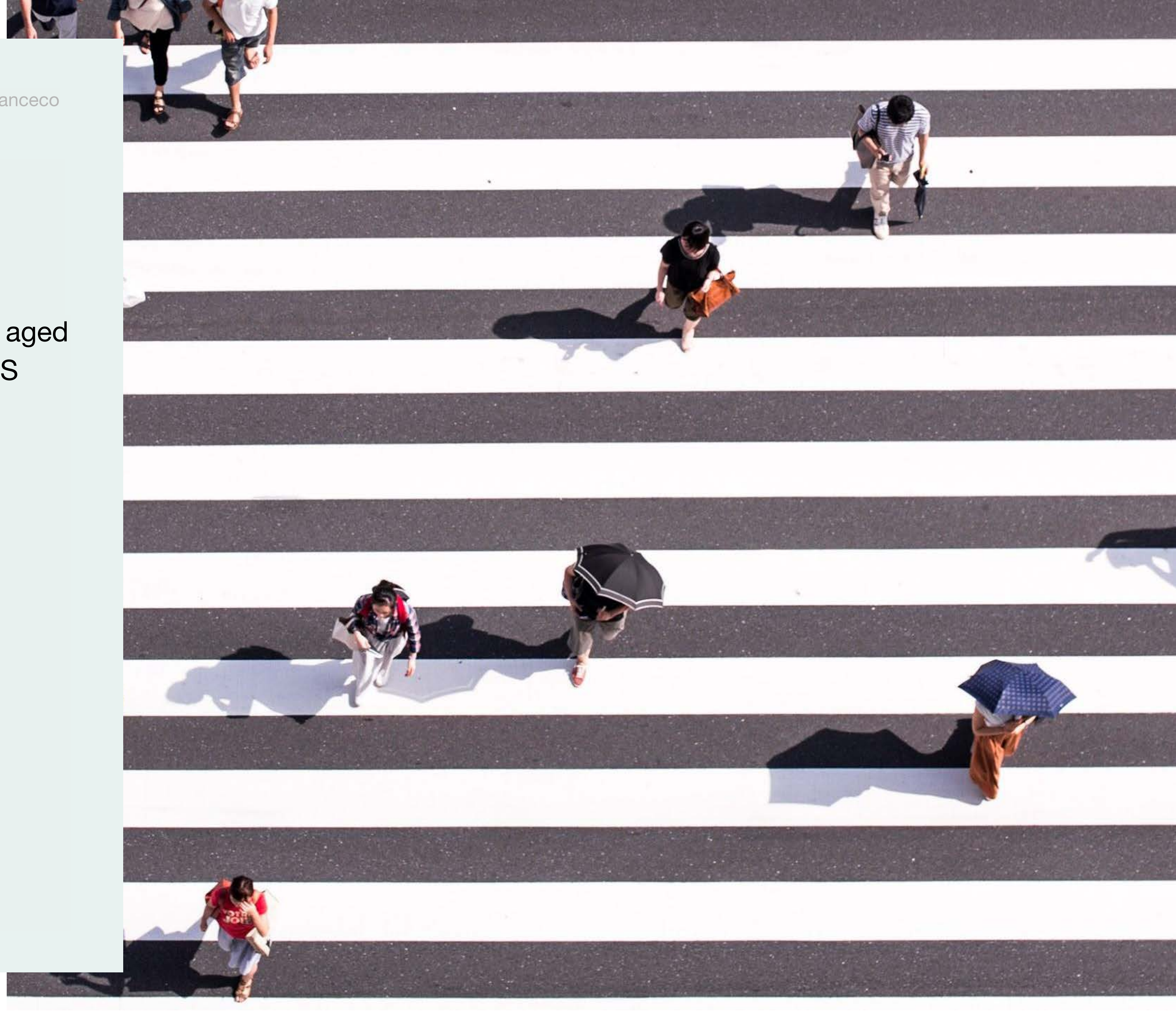
MEASURING PERCEPTION

In 2017, IPSOS interviewed 18,557 adults aged 16-64 across 26 countries using the IPSOS online panel system.

TOP CITIES FOR LIVING

IPSOS City Index

City	% score	2017 rank	2013 rank
Zurich	18	1	1
Sydney	16	2	2
Abu Dhabi	13	3	7
Vancouver	13	3	–
Stockholm	13	3	8
London	12	6	3
Amsterdam	12	6	10
Toronto	12	6	6
Oslo	12	6	10
New York	11	10	5
Paris	11	10	3

TOP CITIES TO DO BUSINESS

City	% score	2017 rank	2013 rank
New York	23	1	1
Abu Dhabi	21	2	2
London	16	3	5
Hong Kong	16	3	3
Tokyo	15	5	4
Zurich	11	6	7
Beijing	11	6	6
Los Angeles	11	6	10
Berlin	10	9	9
Shanghai	10	9	9

TOP CITIES TO VISIT

IPSOS City Index

City	% score	2017 rank	2013 rank
Paris	21	1	1
Rome	20	2	3
New York	16	3	2
London	12	4	4
Sydney	12	4	5
Abu Dhabi	12	6	6
Tokyo	12	6	6
Amsterdam	10	8	10
Los Angeles	9	9	7
Madrid	8	10	10
Zurich	8	10	10

TOP CITIES OVERALL

City	% score	2017 rank	2013 rank
New York	50	1	1
Abu Dhabi	46	2	4
London	41	3	2
Paris	39	4	3
Sydney	36	5	5
Zurich	36	5	6
Tokyo	36	5	7
Rome	34	8	9
Los Angeles	28	9	10
Amsterdam	27	10	14

2. FACTORS THAT SHAPE PERCEPTION OF PLACE

PERCEPTION

PRODUCT

WHAT ASSETS AND LIABILITIES SHAPE OUR PERCEPTION OF THE DESIRABILITY OF PLACES TO LIVE, WORK & INVEST?

MILLENNIALS

In 2016, Resonance interviewed 1,500 "mobile" millennials and asked them what they look for in a place to visit or live.
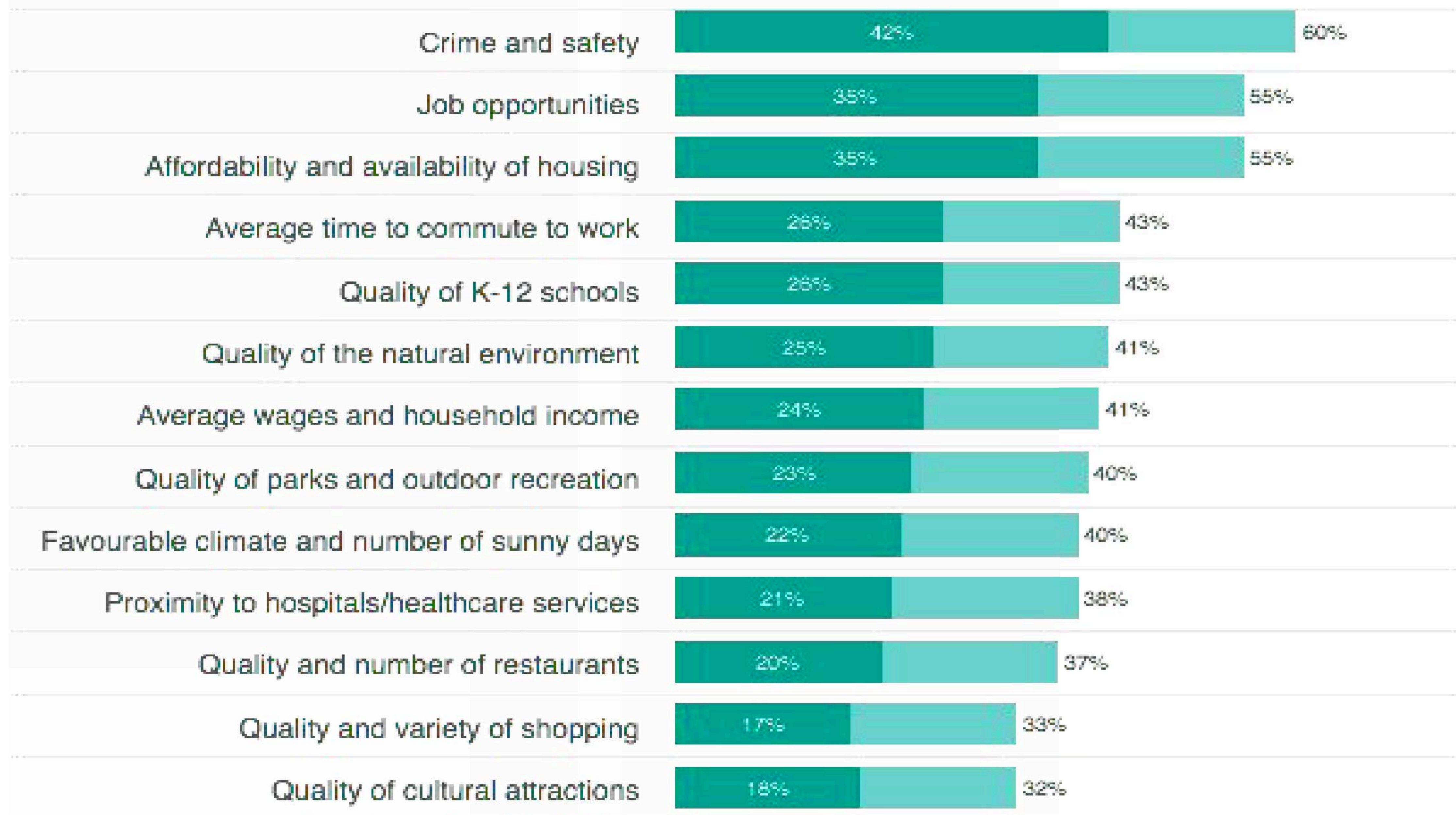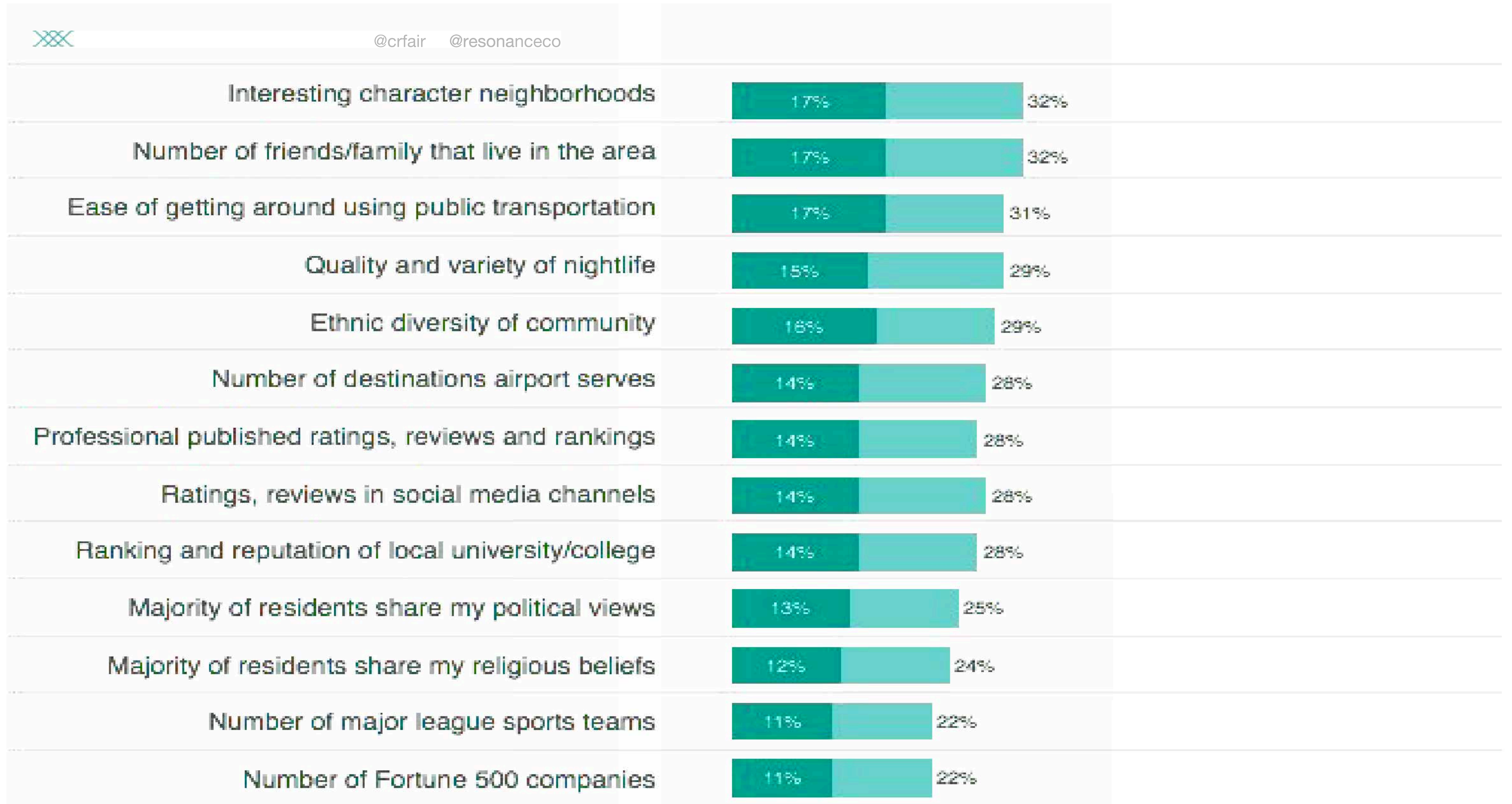
WHAT MILLENNIALS WANT IN A CITY TO LIVE

Category	Value 1	Value 2
Crime and safety	42%	60%
Job opportunities	35%	55%
Affordability and availability of housing	35%	55%
Average time to commute to work	26%	43%
Quality of K-12 schools	26%	43%
Quality of the natural environment	25%	41%
Average wages and household income	24%	41%
Quality of parks and outdoor recreation	23%	40%
Favourable climate and number of sunny days	22%	40%
Proximity to hospitals/healthcare services	21%	38%
Quality and number of restaurants	20%	37%
Quality and variety of shopping	17%	33%
Quality of cultural attractions	18%	32%

	10	9
Interesting character neighborhoods	17%	32%
Number of friends/family that live in the area	17%	32%
Ease of getting around using public transportation	17%	31%
Quality and variety of nightlife	15%	29%
Ethnic diversity of community	16%	29%
Number of destinations airport serves	14%	28%
Professional published ratings, reviews and rankings	14%	28%
Ratings, reviews in social media channels	14%	28%
Ranking and reputation of local university/college	14%	28%
Majority of residents share my political views	13%	25%
Majority of residents share my religious beliefs	12%	24%
Number of major league sports teams	11%	22%
Number of Fortune 500 companies	11%	22%

10 – Extremely important   9

WHAT THEY WANT IN A VACATION DESTINATION

	10 – Extremely important	9
Safety	39%	57%
Cost	35%	52%
English spoken	26%	44%
Quality of the natural environment/scenery	26%	42%
Number of fun attractions	23%	39%
Easily accessible by commercial flights	22%	38%
Opportunities to learn something new	21%	37%
Quality of parks/outdoor recreation	21%	37%
Good cultural attractions	19%	36%
Warm climate/weather	19%	36%
Exciting city environment	19%	35%
Close to beach, access to water	19%	35%
Iconic landmarks	18%	34%

	10	9	Total
Quality and number of restaurants	18%		34%
Ease of getting around using public transportation	19%		34%
All inclusive pricing	19%		34%
Online peer reviews and ratings	16%		32%
Passport not required to visit	18%		29%
Quality and variety of shopping	15%		28%
Cultural festivals and events	15%		28%
Off the beaten path location	13%		25%
Professional printed guidebook reviews	11%		24%
Social media postings by friends/family	13%		24%
Magazine/Newspaper articles	11%		22%
Sporting events	10%		22%

Legend: ■ 10 – Extremely important   ■ 9

TO LIVE
TO VISIT

TO LIVE	TO VISIT
Safety	Safety
Job opportunities	Cost
Affordability of housing	English spoken
Average commute time	Quality of the natural environment
Quality of the natural environment	Number of fun attractions
Average wages and household income	Easily accessible by commercial flights
Quality of parks and outdoor recreation	Opportunities to learn something new
Favourable climate	Quality of parks and outdoor recreation
Proximity to hospitals and healthcare services	Good cultural attractions
Quality and number of restaurants	Favourable climate

3. A MODEL FOR EVALUATING THE COMPETITIVE STRENGTHS & WEAKNESSES OF PLACE

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PERCEPTION IS SHAPED BY 23 FACTORS GROUPED INTO 6 CATEGORIES

01 **Place**: Quality of a city's natural and built environment

02 **Product**: A city's key institutions, attractions and infrastructure

03 **Programming**: The arts, culture and entertainment in a city

04 **People**: Immigration and diversity of a city

05 **Prosperity**: Employment, GDP per capita, and companies in a city

06 **Promotion**: Quantity of articles, references and recommendations online

COMPETITIVE IDENTITY

PLACE

Quality of a city or community's natural and built environment.

PLACE

Quality of a city or community's natural and built environment.

Weather	*National Climatic Weather Centre*
Crime rate	*Office for National, Regional Statistics, UN Office Drugs & Crime/Eurostat*
Neighbourhoods & Landmarks	*TripAdvisor*
Parks & Outdoors	*TripAdvisor*
Air Quality Index	*World Health Organization*
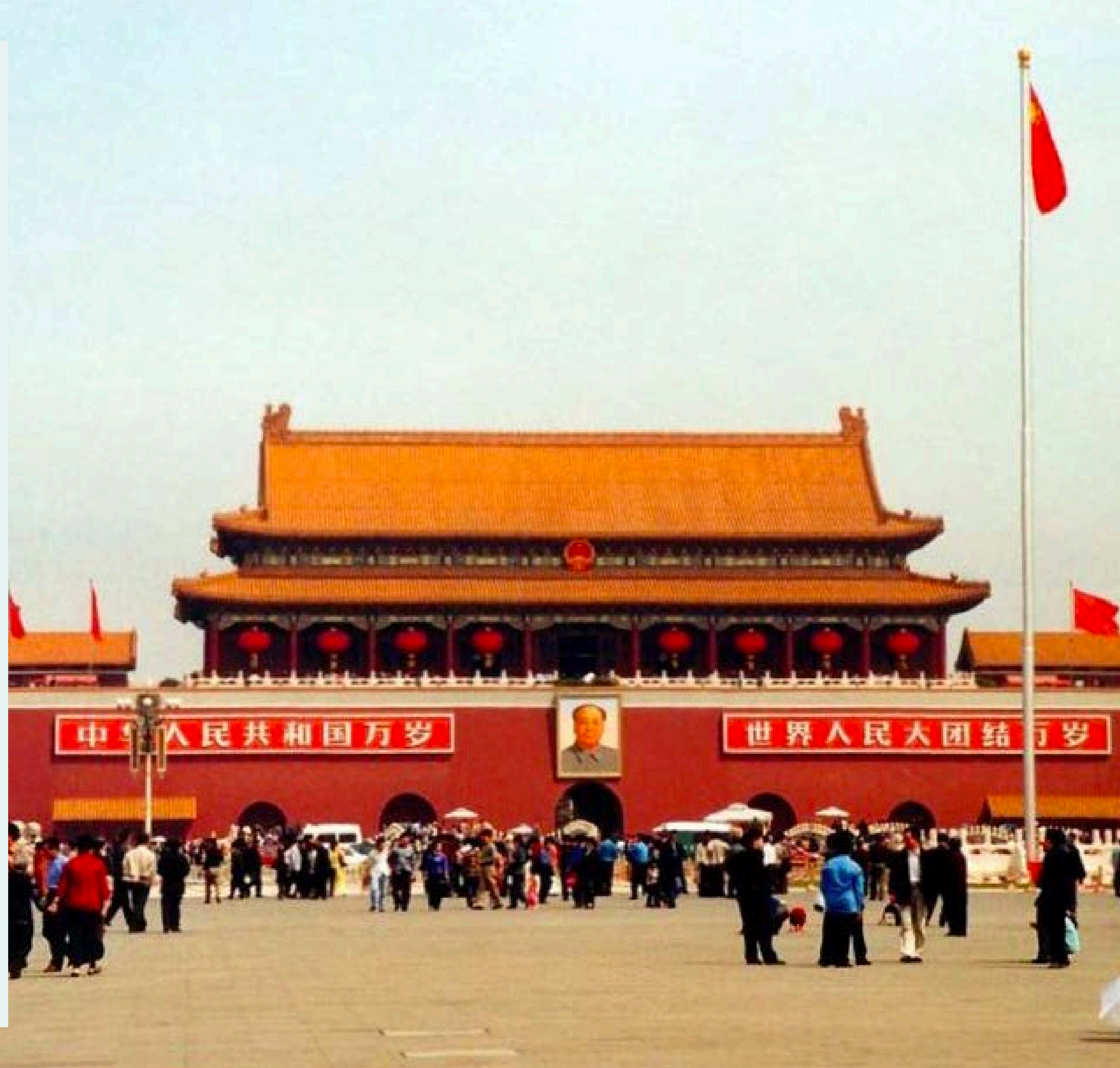
BEIJING

BEIJING

BEIJING ANNUAL INBOUND VISITORS

BEIJING ANNUAL AVERAGE PM 2.5

CHINA PM 2.5 STANDARD

U.S. PM 2.5 STANDARD

@crfair   @resonanceco

Annual Inbound Visitors (millions)

Annual Average PM 2.5 levels (μg/m3)

6
5
4
3
2
1
0

160
140
120
100
80
60
40
20
0

2008   2009   2010   2011   2012   2013   2014

TIMES SQUARE
1970s

TIMES SQUARE 2013

TOTAL VISITORS

TOTAL CRIME RATE

Visitors in millions

Crime Rate per 100,000 people
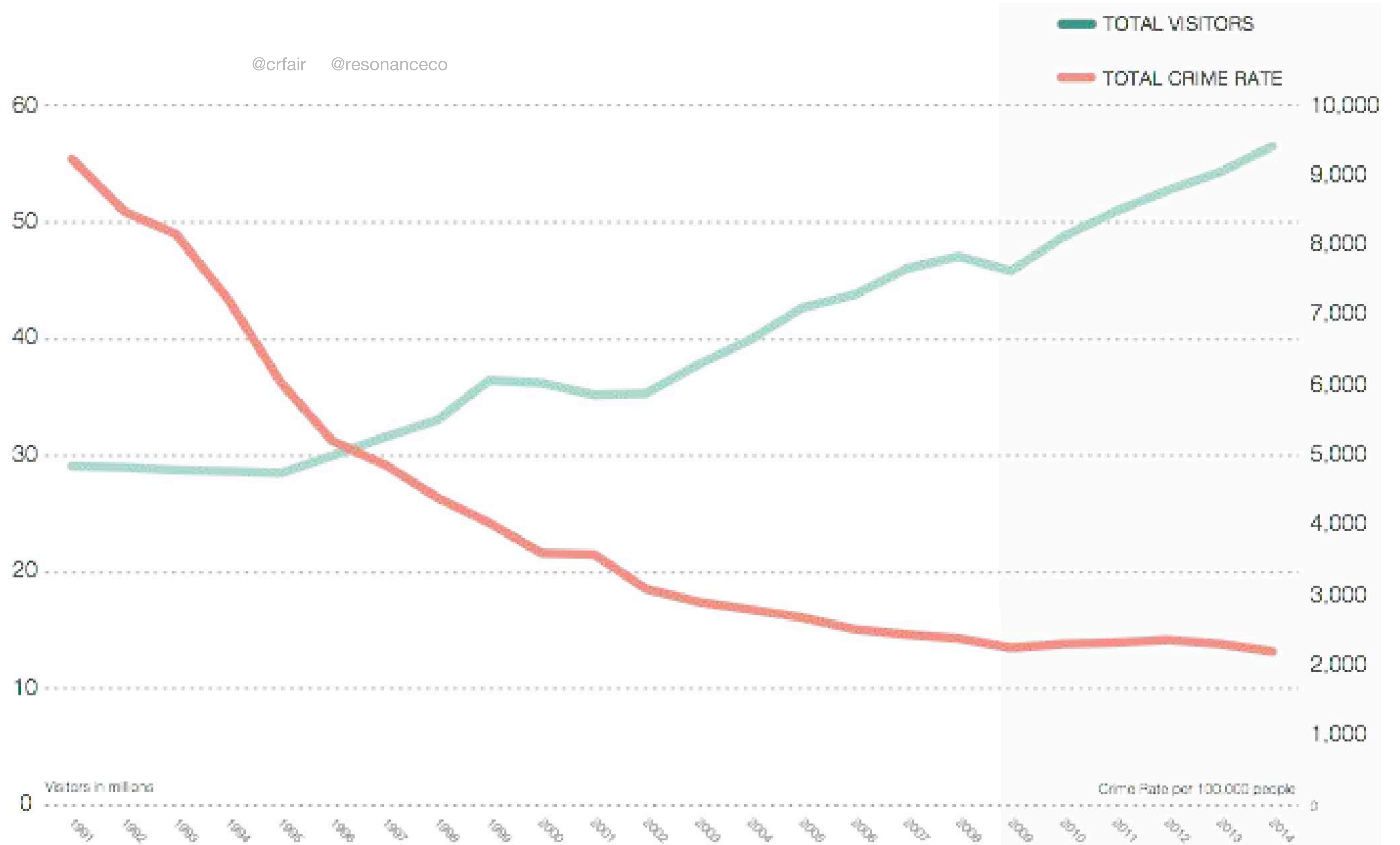
TOP 25 CITIES FOR PLACE

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World's Best Cities

01. TOKYO	11. DUBAI	21. HONG KONG
02. BARCELONA	12. MOSCOW	22. AUCKLAND
03. SAN DIEGO	13. SINGAPORE	23. SEATTLE
04. ROME	14. MIAMI	24. ST. PETERSBURG
05. LONDON	15. CAPE TOWN	25. RIO DE JANEIRO
06. VENICE	16. LAS VEGAS	
07. SYDNEY	17. BEIJING	
08. BRISBANE	18. LISBON	
09. MADRID	19. SAN FRANCISCO	
10. NEW YORK	20. TUCSON	

PRODUCT

A community's key institutions, attractions and infrastructure.

PRODUCT

A community's key institutions, attractions and infrastructure.

University Ranking	*OS World University Rankings*
Connectivity	*Google Flights*
Convention Centres	*Official Convention Centre Website*
Entertainment	*TripAdvisor*
Museums & Fine Arts Institutions	*TripAdvisor*

BILBAO

Guggenheim Museum Bilbao

BISCAY PROVINCE

Monthly overnight stays of foreign visitors in the province of biscay from January 1980 to December 2010.
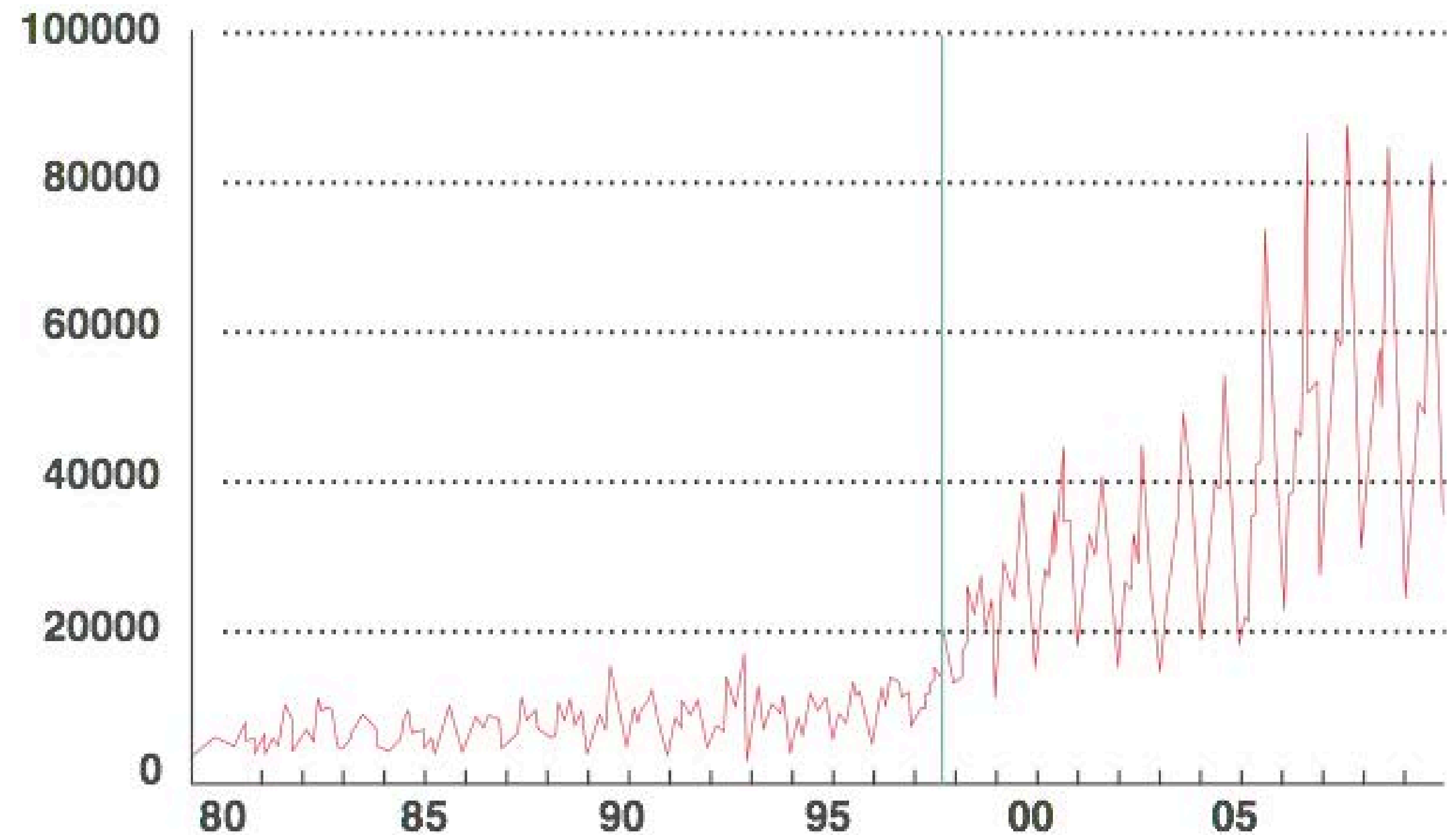
PROGRAMMING

The arts, culture and entertainment in a community.
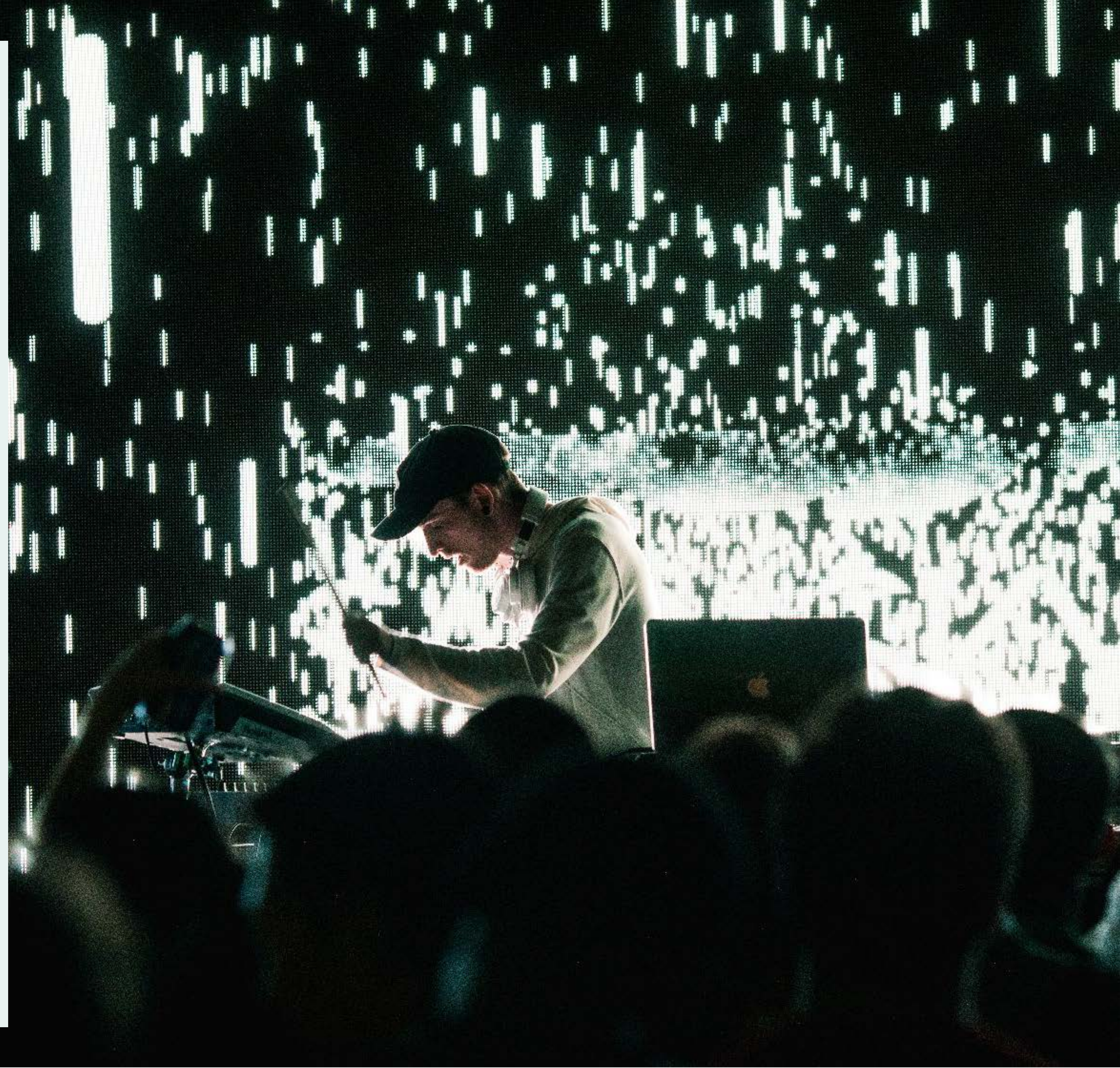
PROGRAMMING

The arts, culture and entertainment in a community.

Restaurants & Culinary Experiences	*TripAdvisor*
Shopping	*TripAdvisor*
Nightlife	*TripAdvisor*
Culture & Performing Arts	*TripAdvisor*

PORTLAND, OR

PEOPLE

Educational attainment, immigration and diversity of a community.

PEOPLE

Educational attainment, immigration and diversity of a community.

Foreign-born residents	*Office for National, Regional Statistics, World Bank, Eurostat*
Educational Attainment	*Office for National, Regional Statistics, World Bank, Eurostat*

TOP 25 CITIES FOR PEOPLE

World's Best Cities

01. VANCOUVER	11. BASEL	21. LUXEMBOURG
02. TORONTO	12. OTTAWA	22. MELBOURNE
03. SAN FRANCISCO	13. SINGAPORE	23. EDMONTON
04. ZURICH	14. BRUSSELS	24. MOSCOW
05. DUBAI	15. SAN JOSE	25. SYDNEY
06. LONDON	16. MONTREAL	
07. ABU DHABI	17. AMSTERDAM	
08. CALGARY	18. MIAMI	
09. PARIS	19. PERTH	
10. SEATTLE	20. TEL AVIV	

PROSPERITY

The relative wealth of a community.

PROSPERITY

The relative wealth of a community.

Global Fortune 500 companies	*Fortune*
GDP per Capita	*Brookings - Metropolitan Policy Program*
Unemployment Rate	*Office for National, Regional Statistics, Eurostat*

PROMOTION

How much does the world
talk about you online?

PROMOTION

How much does the world
talk about you online?

Google References	*Google*
TripAdvisor Reviews	*TripAdvisor*
Google Trends	*Google*
Facebook check-ins	*Facebook*

TOP 25 CITIES
FOR PROMOTION

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World's Best Cities

1. LONDON	11. CHICAGO	21. AMSTERDAM
2. NEW YORK	12. LOS ANGELES	22. MILAN
3. PARIS	13. SAO PAULO	23. SYDNEY
4. SINGAPORE	14. BERLIN	24. ISTANBUL
5. HONG KONG	15. WASHINGTON	25. ORLANDO
6. ROME	16. RIO DE JANEIRO	35. MIAMI
7. BARCELONA	17. BANGKOK	
8. MADRID	18. TORONTO	
9. DUBAI	19. SAN FRANCISCO	
10. LAS VEGAS	20. HAMBURG	

OVERALL

4. A NEW APPROACH TO MAPPING A CITIES COMPETITIVE IDENTITY
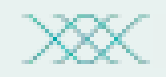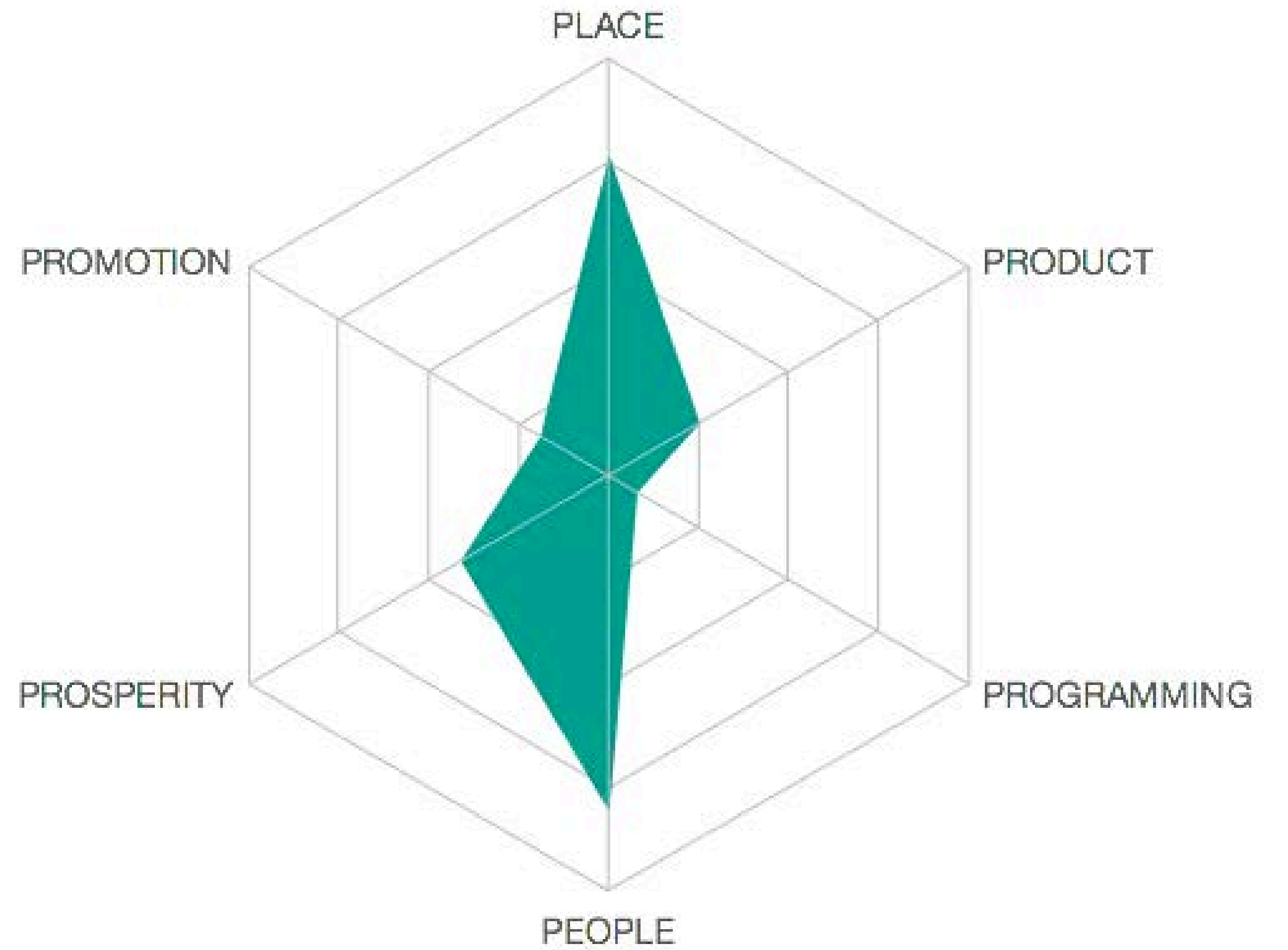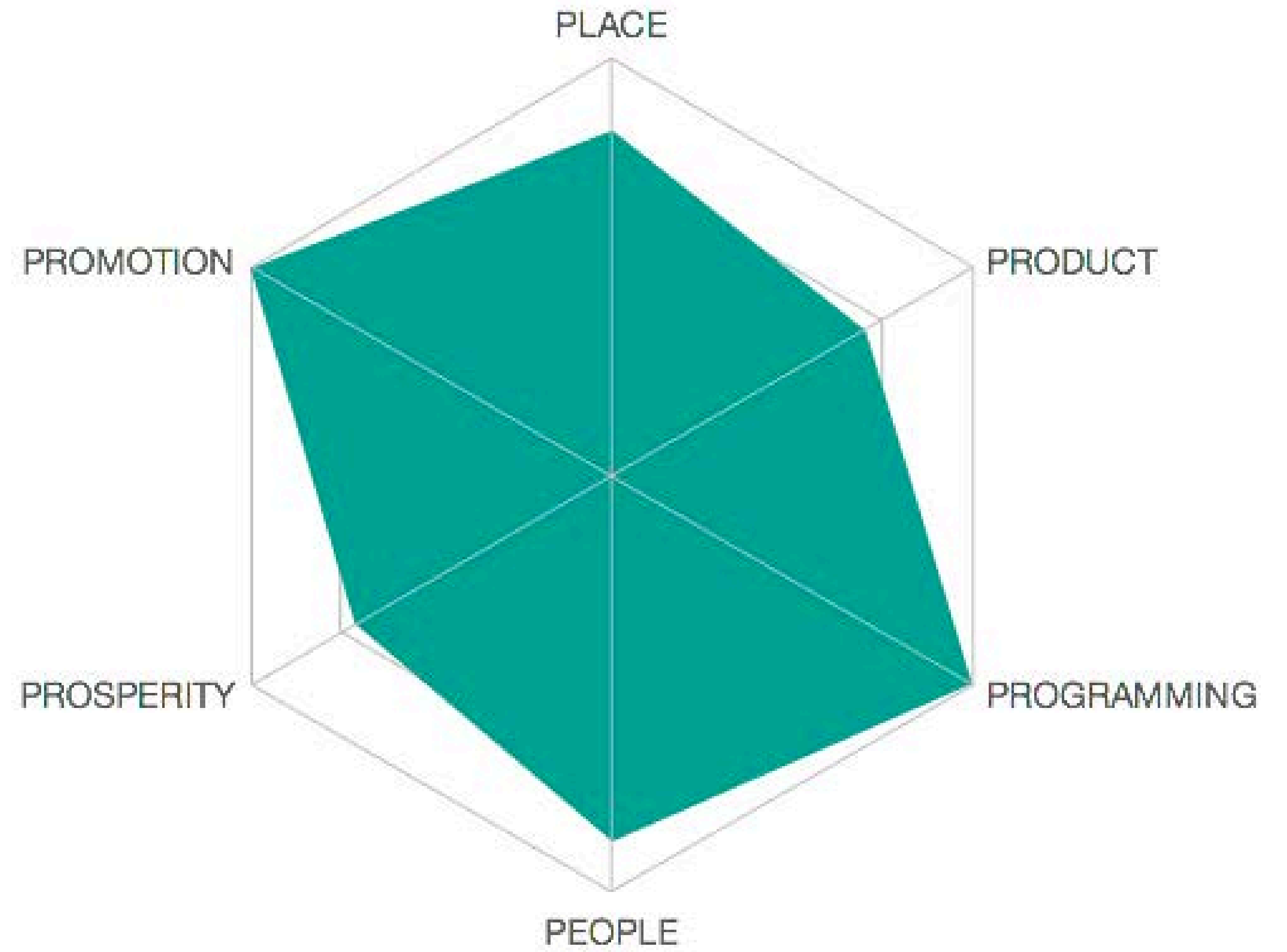
27
MIAMI

PLACE

PRODUCT

PROGRAMMING

PEOPLE

PROSPERITY

PROMOTION

01
LONDON

02
NEW YORK

03
PARIS

07
DUBAI

08
BARCELONA

Radar chart with axes: PLACE, PRODUCT, PROGRAMMING, PEOPLE, PROSPERITY, PROMOTION

09
SAN FRANCISCO

11
TORONTO

30
ORLANDO

37
DENVER

Radar chart with axes: PLACE, PRODUCT, PROGRAMMING, PEOPLE, PROSPERITY, PROMOTION

128
DETROIT

PLACE

PRODUCT

PROGRAMMING

PEOPLE

PROSPERITY

PROMOTION
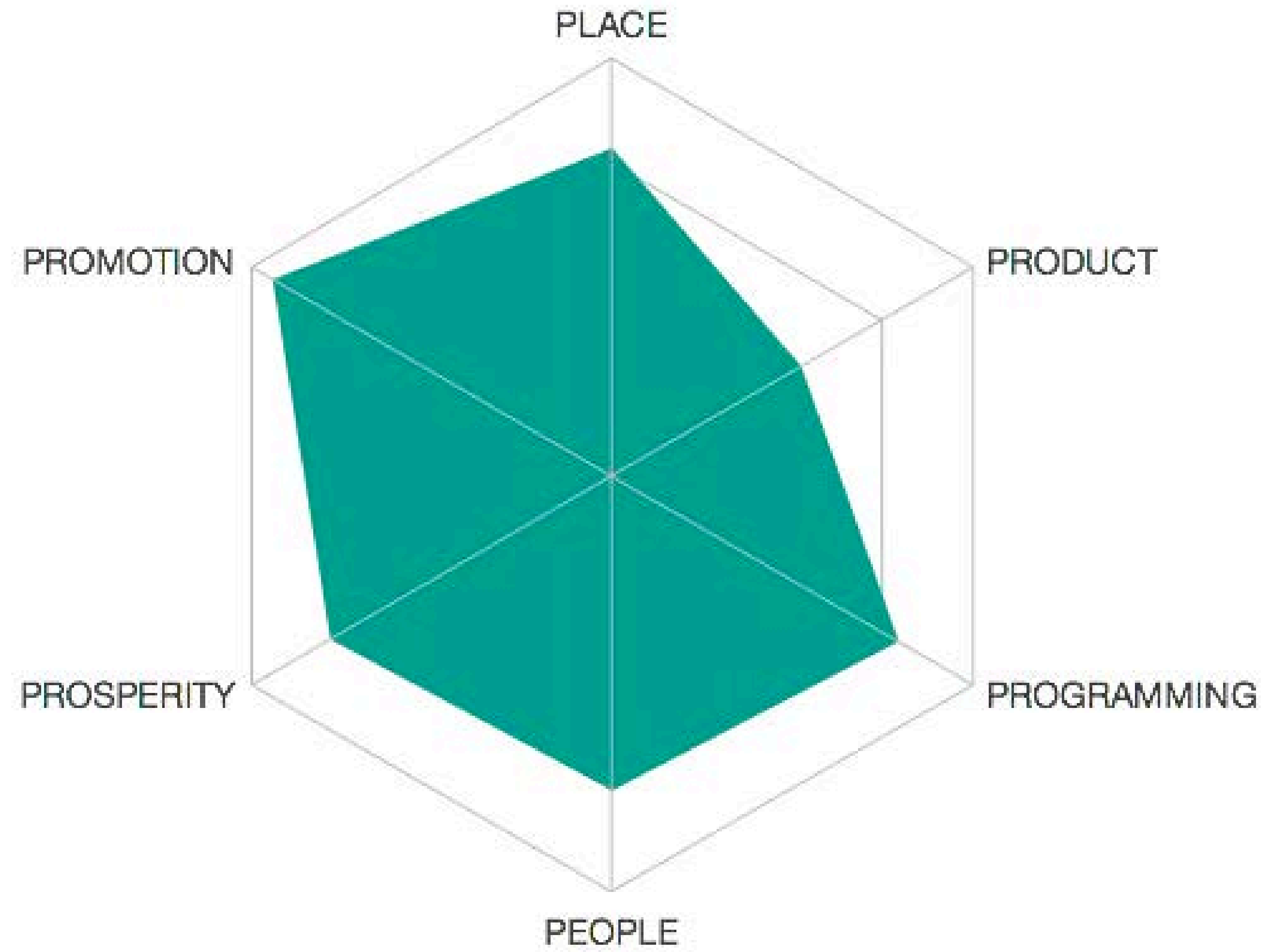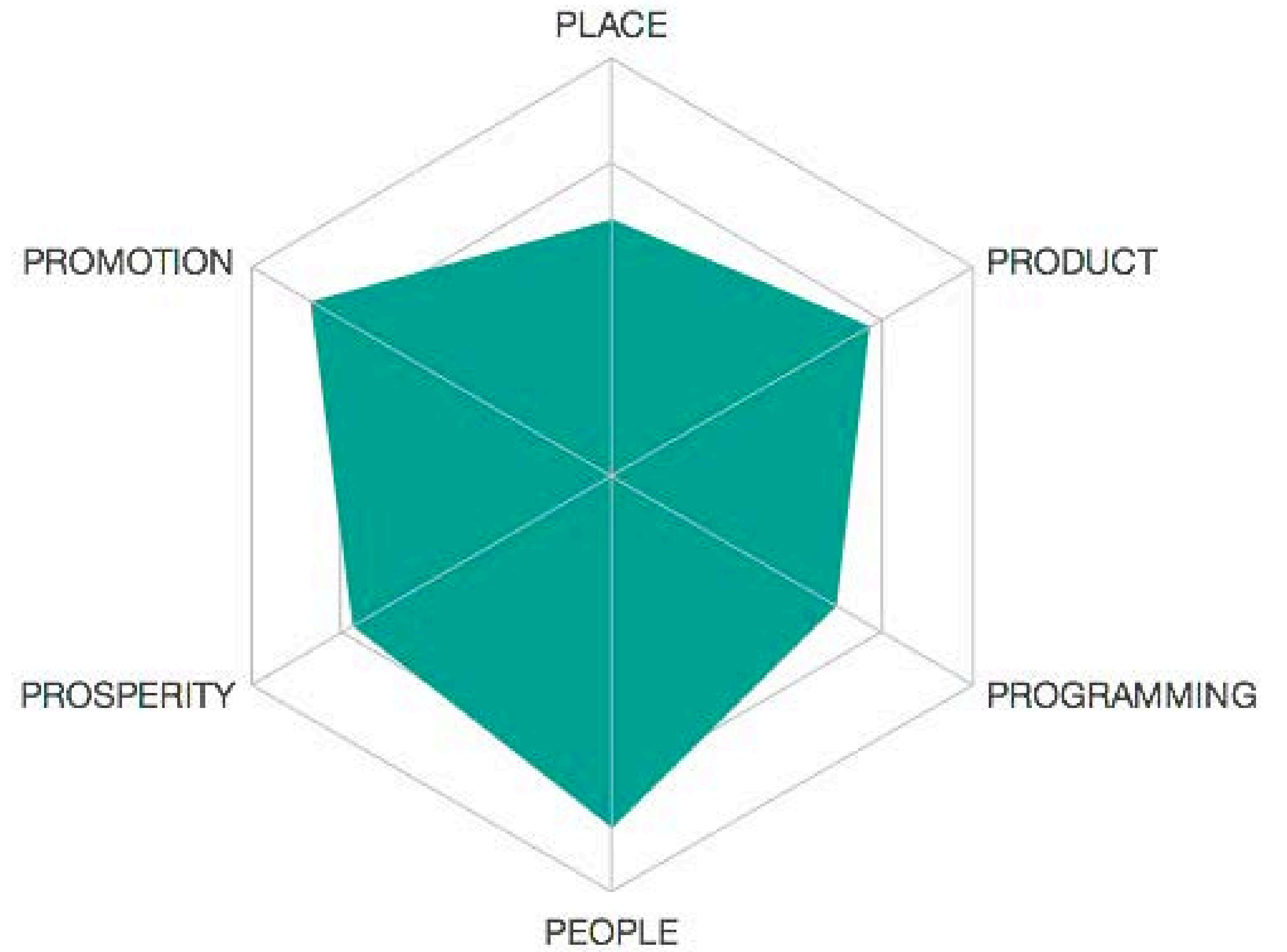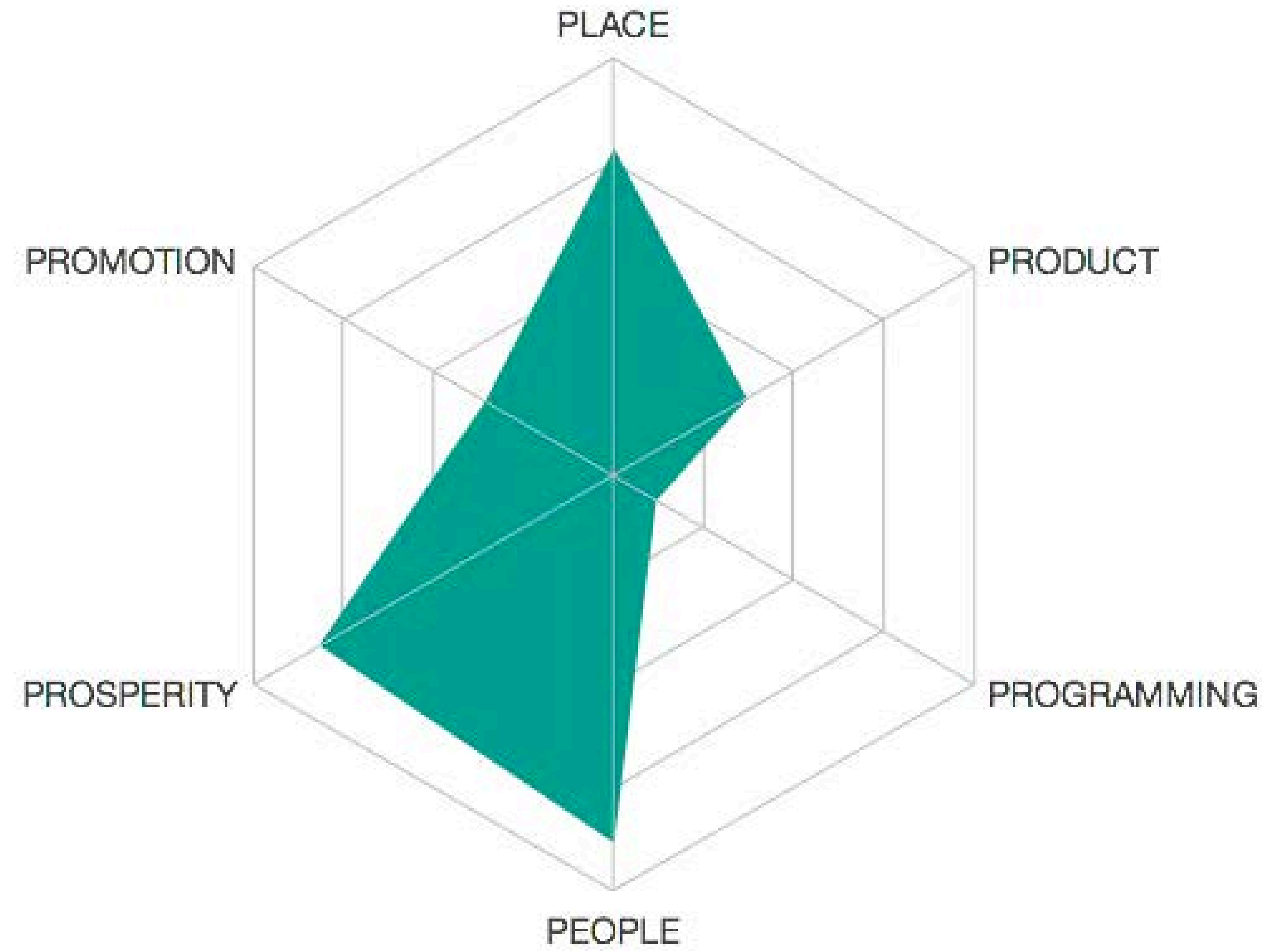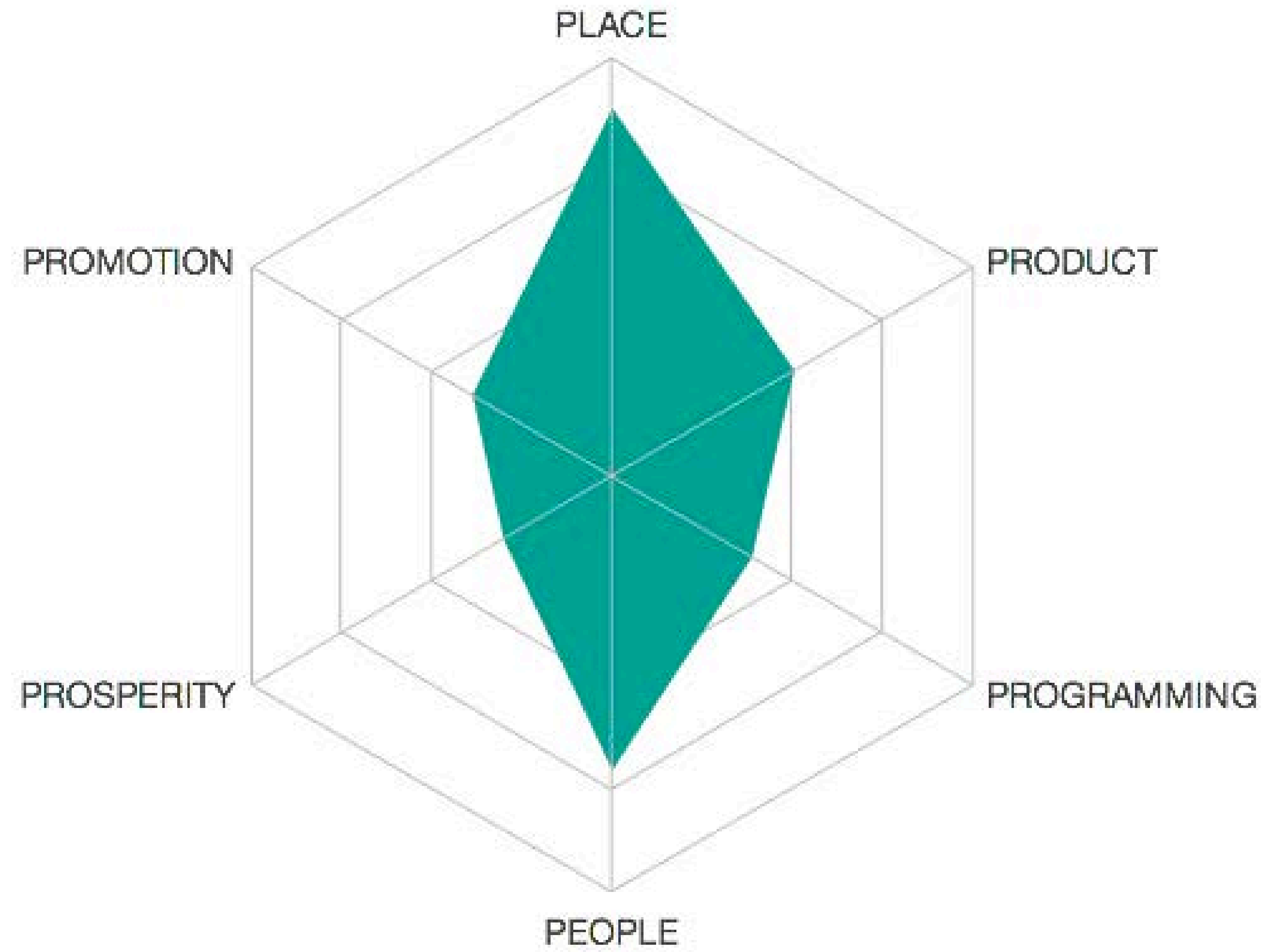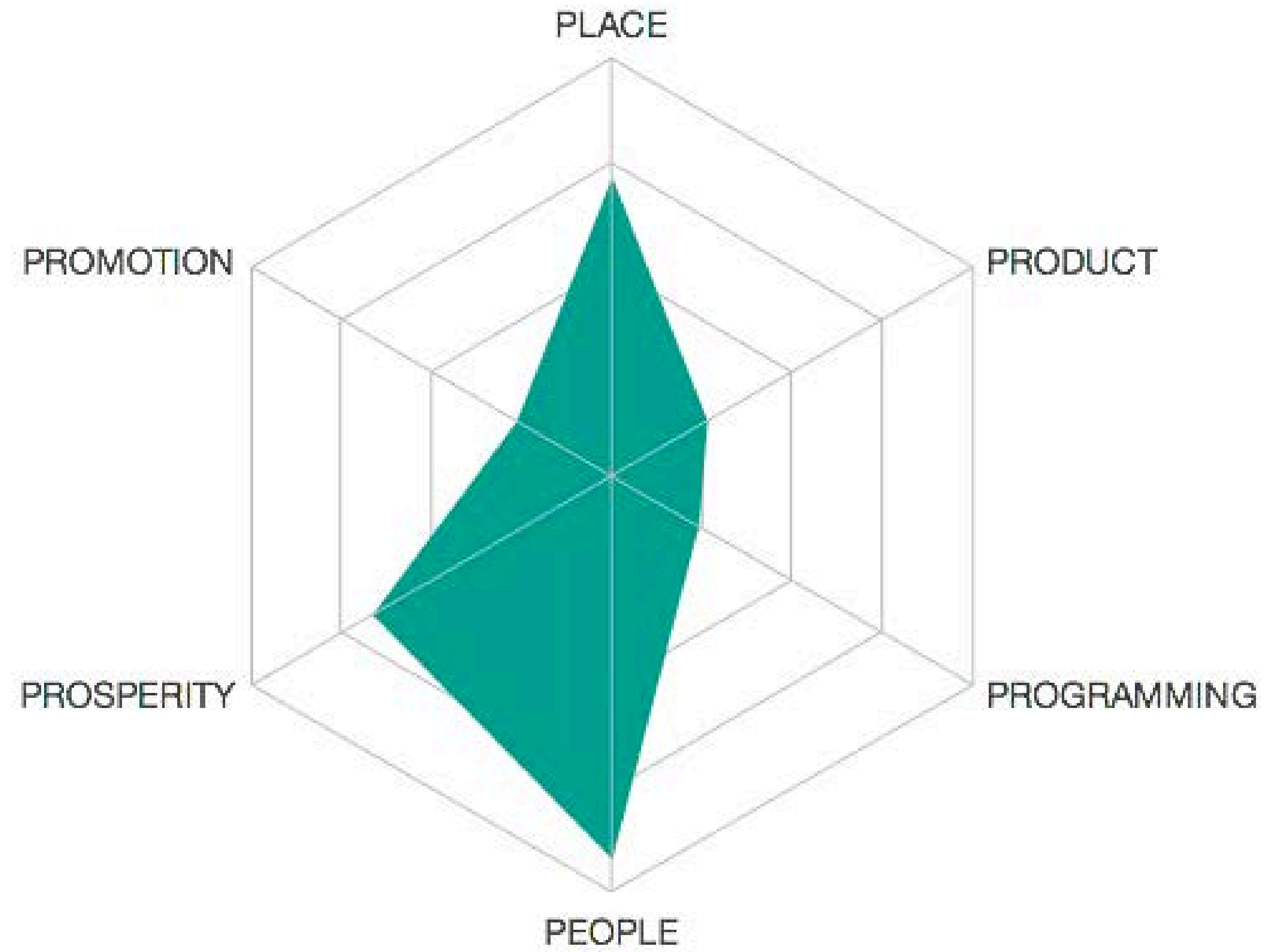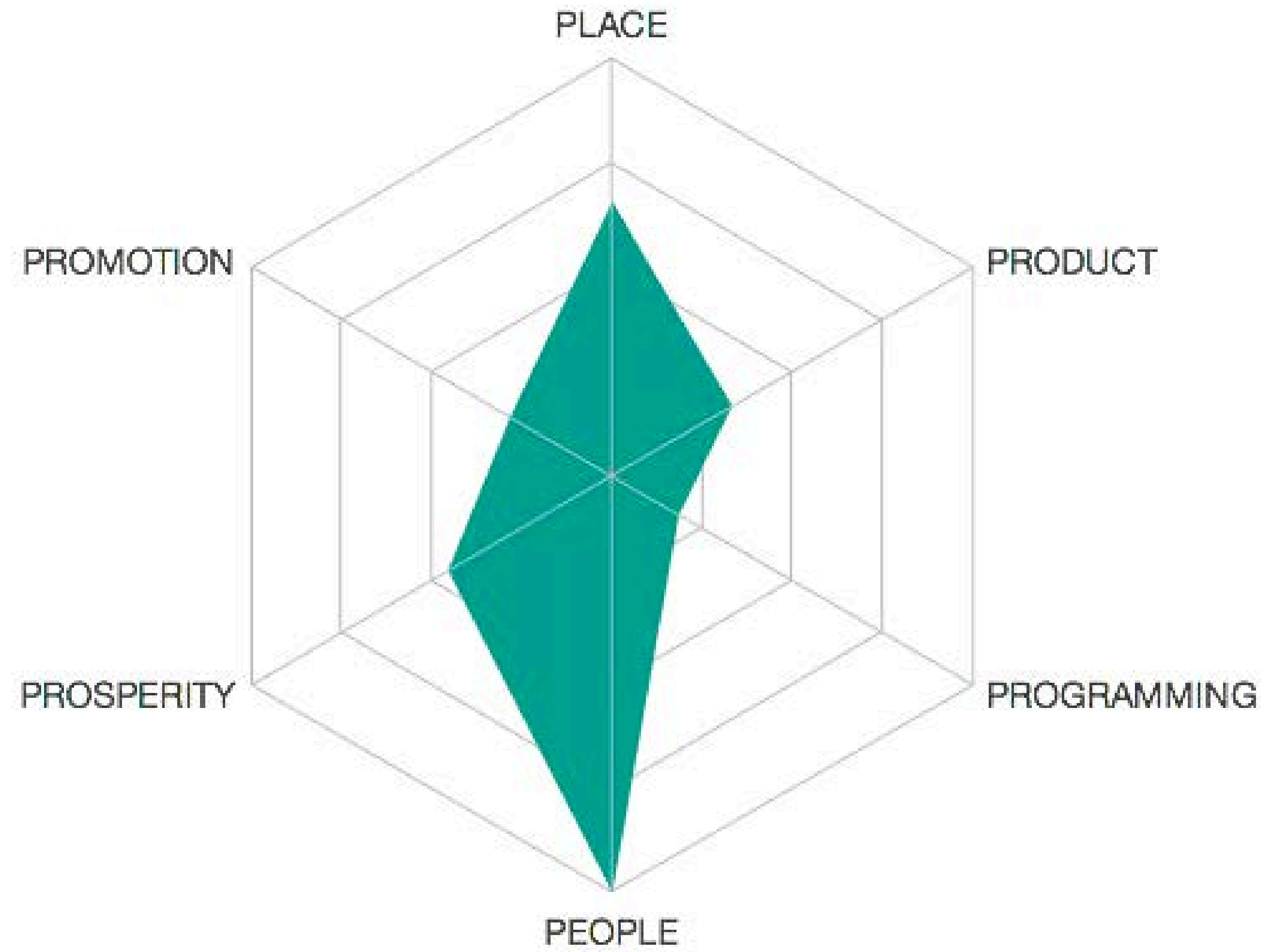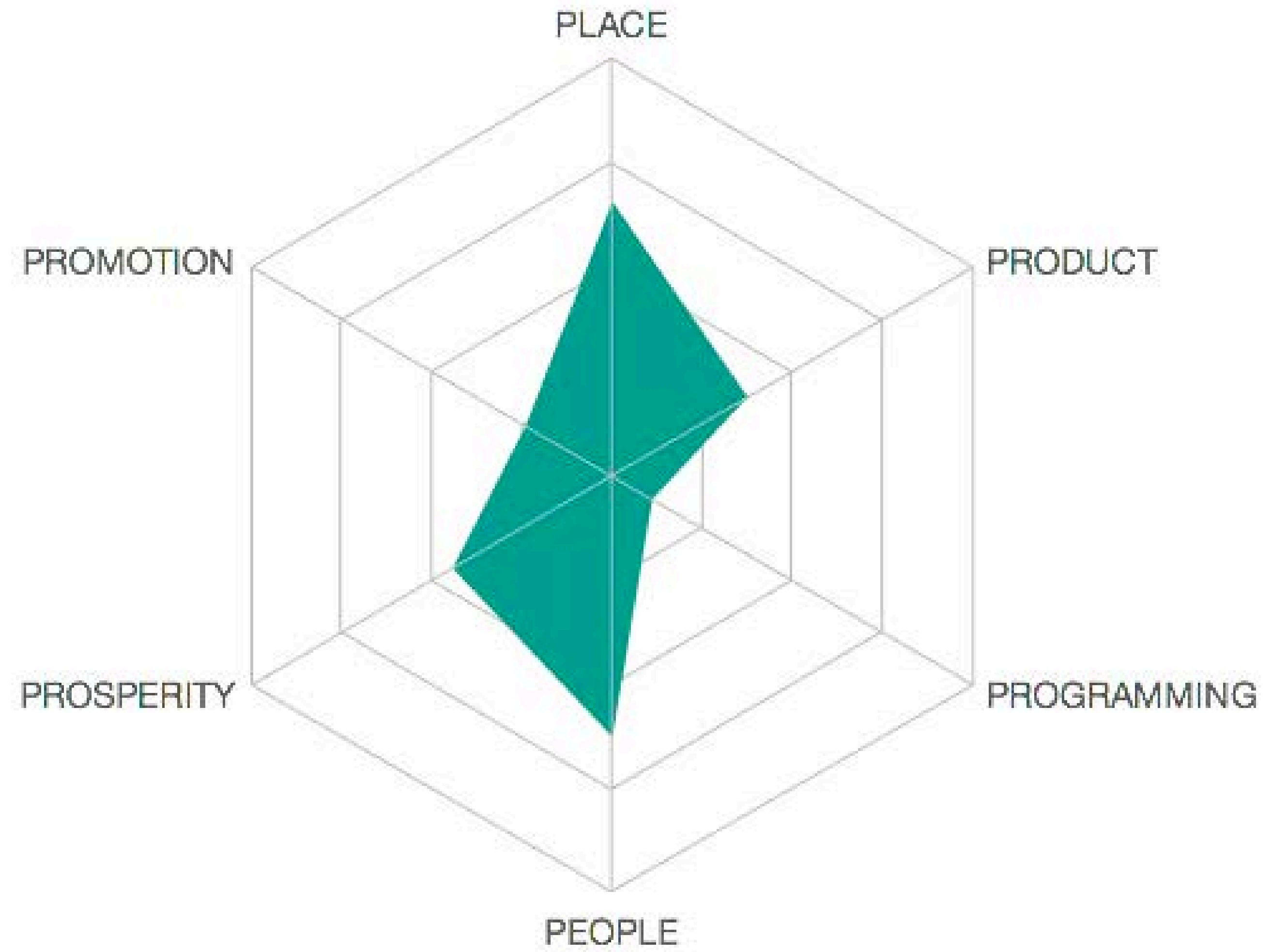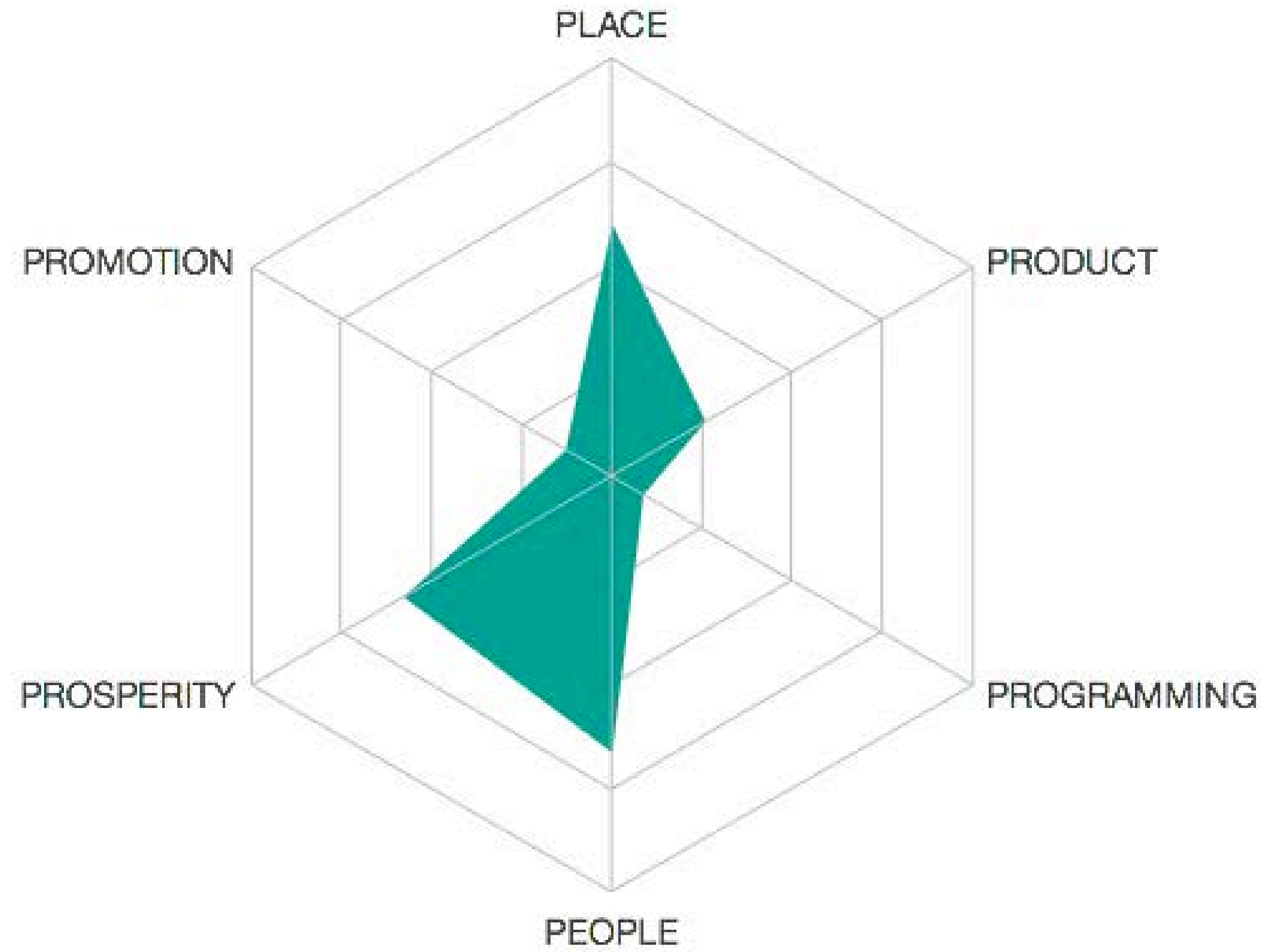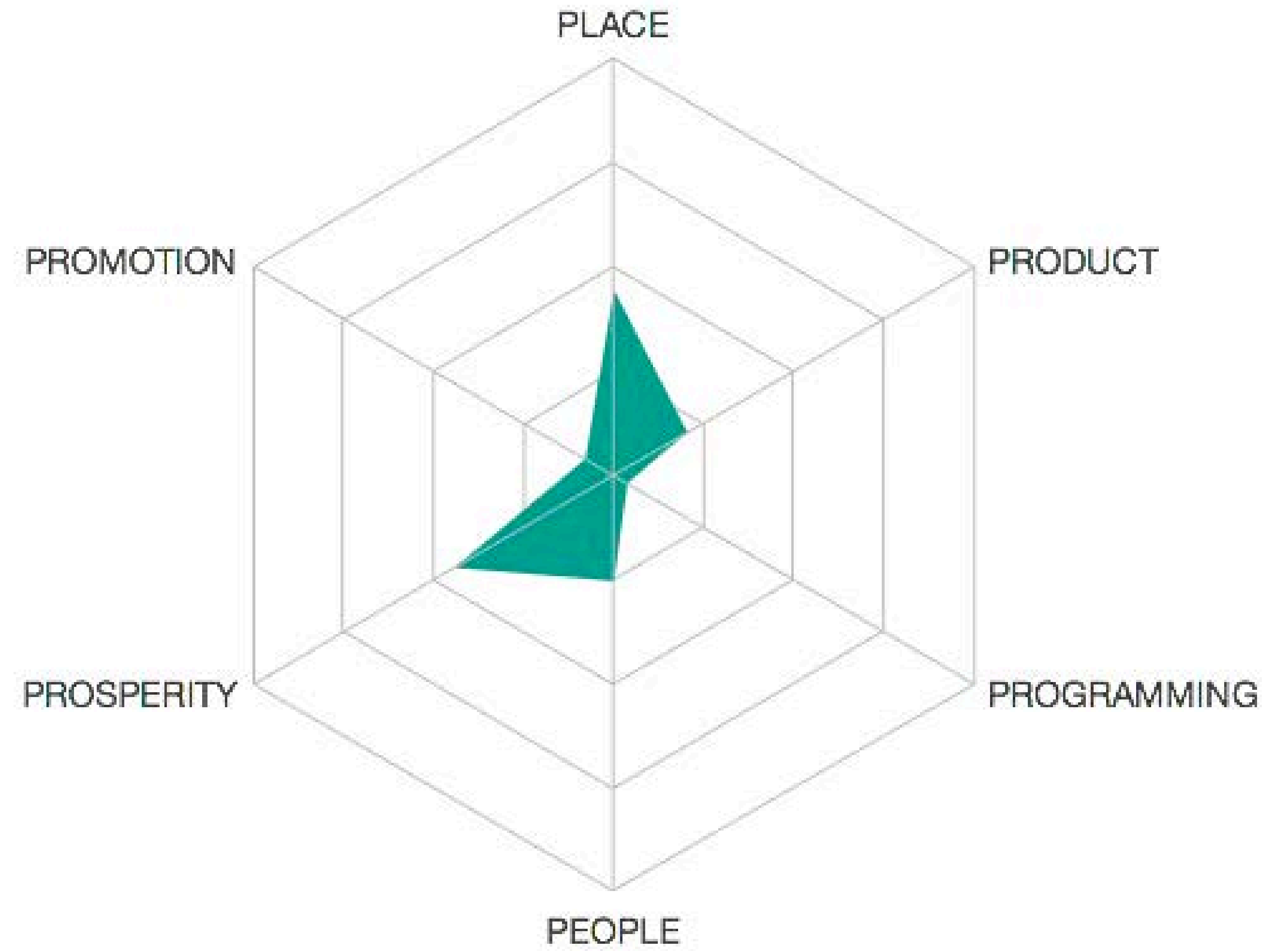
5. DEVELOPING YOUR PLACE BRANDING STRATEGY

FACTORS THAT SHAPE PERCEPTION OF PLACE

PERCEPTION

PRODUCT

TOP CITIES OVERALL

IPSOS City Index

City	% score	2017 rank	2013 rank
New York	50	1	1
Abu Dhabi	46	2	4
London	41	3	2
Paris	39	4	3
Sydney	36	5	5
Zurich	36	5	6
Tokyo	36	5	7
Rome	34	8	9
Los Angeles	28	9	10
Amsterdam	27	10	14

TOP 30 CITIES OVERALL

World's Best Cities

1. LONDON	11. MADRID	21. WASHINGTON
2. NEW YORK	12. LOS ANGELES	22. ST. PETERSBURG
3. PARIS	13. TORONTO	23. PRAGUE
4. MOSCOW	14. AMSTERDAM	24. BEIJING
5. TOKYO	15. BOSTON	25. SYDNEY
6. SINGAPORE	16. ROME	26. SAN JOSE
7. DUBAI	17. HONG KONG	27. MIAMI
8. BARCELONA	18. LAS VEGAS	28. BERLIN
9. SAN FRANCISCO	19. SEATTLE	29. VANCOUVER
10. CHICAGO	20. SAN DIEGO	30. ORLANDO

RISK & OPPORTUNITY

RISK

OPPORTUNITY

REALITY

PERCEPTION

Abu Dhabi
New York
Zurich   Sydney
London
Paris
Tokyo
Los Angeles
Amsterdam
Toronto
Vancouver
Stockholm
Oslo
Auckland
Singapore
Washington
Osaka
Prague
Boston   Chicago
Cairo   Dublin   Moscow
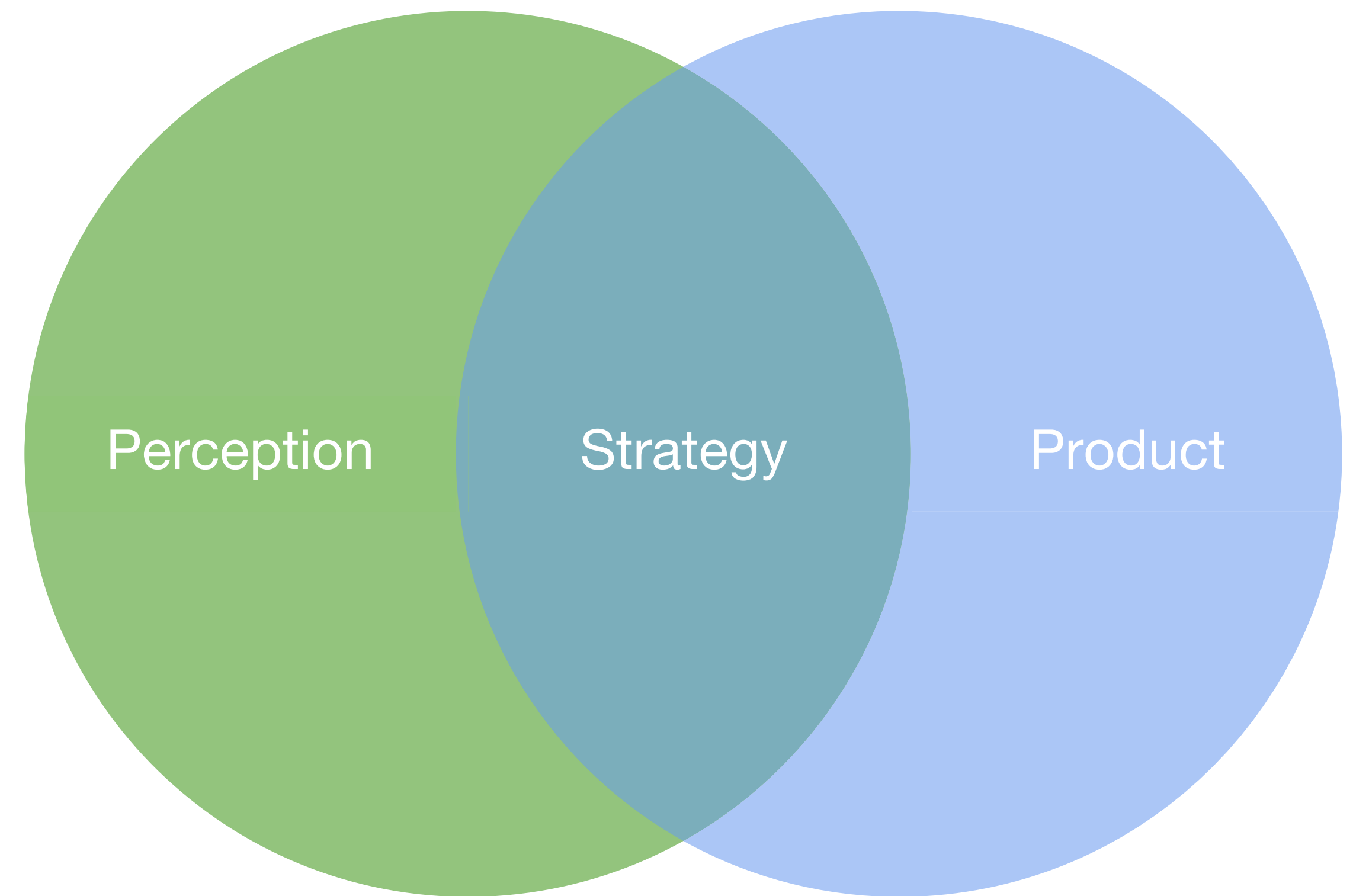Seoul
Budapest
Jakarta   Tel Aviv
Bogota

THE STRATEGY

Perception   Strategy   Product

PLACE BRANDING IS ABOUT MUCH MORE THAN A LOGO OR A TAGLINE.

IT'S A POSITIONING STRATEGY BASED ON AN UNDERSTANDING OF YOUR PERCPETION AND PRODUCT.

6. PERCEPTION & PERFORMANCE

WHICH OF THESE AREAS ARE MOST CLOSELY CORRELATED WITH INTERNATIONAL TOURISM ARRIVALS?

INTERNATIONAL VISITORS

Correlation Coefficient

PROMOTION	0.90
PROGRAMMING	0.82
PRODUCT	0.66
PLACE	0.61
PEOPLE	0.58
PROSPERITY	0.29

INTERNATIONAL VISITORS

	Correlation Coefficient
Facebook Check-in	0.89
TripAdvisor Reviews	0.86
Google Trends	0.85
Neighbourhoods & Landmarks	0.82
Culinary	0.80
Culture	0.78
Google Search Results	0.78
Nightlife	0.78
Shopping	0.78
Museums	0.72

WHICH OF THESE AREAS ARE MOST CLOSELY CORRELATED WITH FOREIGN INVESTMENT?

Correlation Coefficient

FOREIGN DIRECT INVESTMENT

PROMOTION	0.85
PROGRAMMING	0.82
PRODUCT	0.79
PEOPLE	0.44
PLACE	0.35
PROSPERITY	0.29

FOREIGN DIRECT INVESTMENT

	Correlation Coefficient
Google Trends	0.91
Sports Teams	0.87
Facebook Check-in	0.87
Culinary	0.84
Google Search Results	0.83
Museums	0.81
Fortune 500	0.81
Neighbourhoods & Landmarks	0.78
Culture	0.77
Nightlife	0.77

THE FACTORS THAT MAKE A PLACE ATTRACTIVE TO VISIT ARE INCREASINGLY ALIGNED WITH THOSE THAT MAKE IT ATTRACTIVE TO INVEST.

TOURISTS	INVESTMENT
Facebook Check-in	Google Trends
TripAdvisor Reviews	Sports Teams
Google Trends	Facebook Check-in
Neighbourhoods / Landmarks	Culinary
Culinary	Google Search Results
Culture	Museums
Google Search Results	Fortune 500
Nightlife	Neighbourhoods / Landmarks
Shopping	Culture
Museums	Nightlife

PLACE &
PROSPERITY

While livability shapes perception, it has a low correlation with visitor arrivals and foreign investment.

The relative "vibrancy" of the city is determining where tourism and investment flows.

"THE PROBLEM IS NOT SO MUCH TO BRAND THE CITY, BUT TO MAKE THE CITY INTO A BETTER CITY, A CLEANER CITY, A MORE CARING CITY – A CITY WITH SOME INTERESTING THINGS TO SEE AND DO."

– Philip Kotler, Author of Marketing Places

AMAZON HQ2 RFP CRITERIA

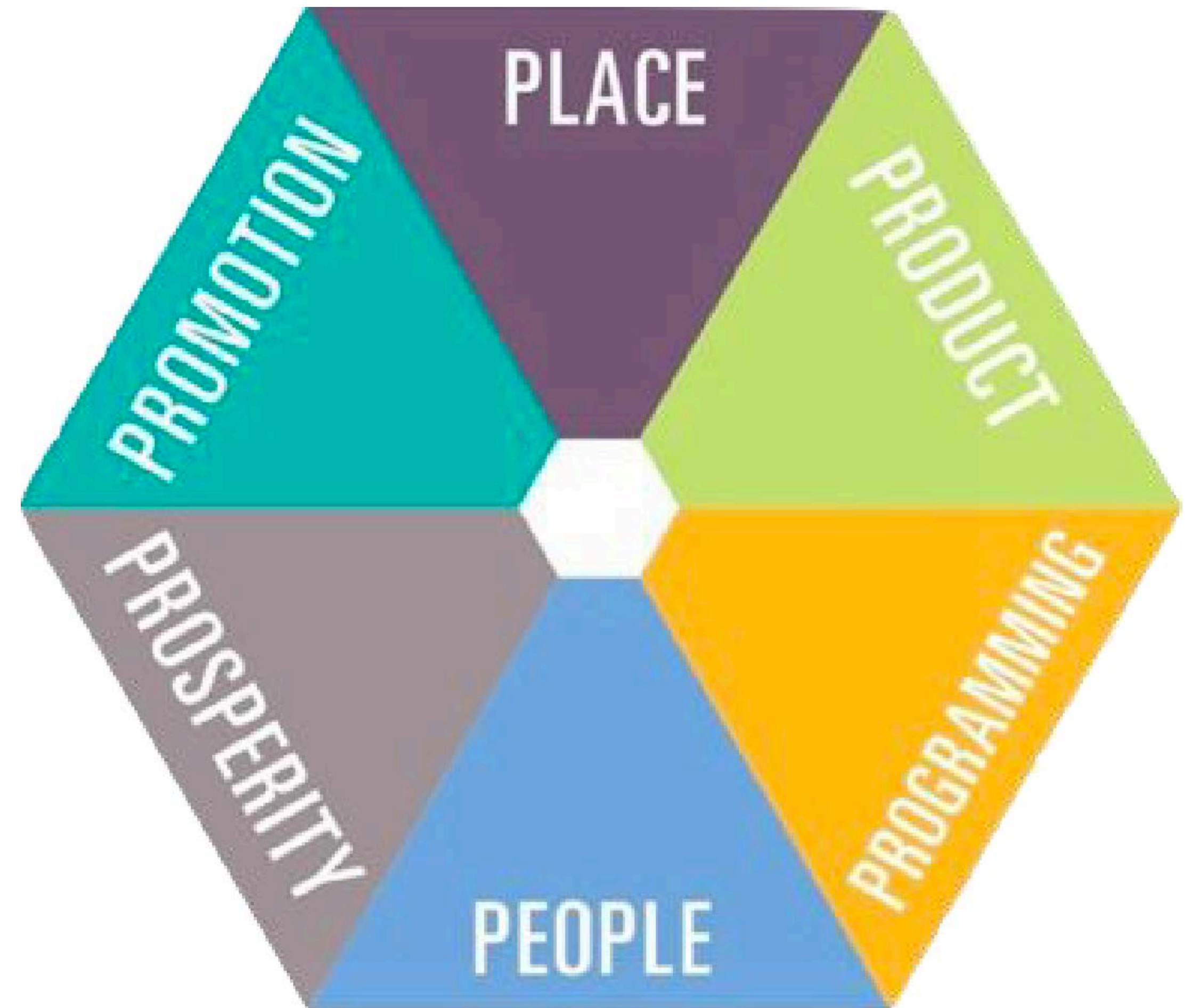|	
Incentives	Tax credits, relocation grants
Labor Force	Educational attainment, university system
Connectivity	Daily direct flights to Seattle, New York, the San Francisco Bay area, and Washington DC.
Infrastructure	Mass transit, inter-connected highway system
Culture	Diversity, inclusion
Quality of Life	Programming, recreational opportunities

COMPETITIVE IDENTITY

THANK YOU

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Vancouver | New York

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@resonanceco

@resonanceco