

2012 City RepTrak™ Topline Report

The world's most reputable cities



The World's View on Cities: An Online Study of the Reputation of 100 Cities

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Global Reputation **Knowledge** and **Advice**

REPUTATION
INSTITUTE



Knowledge Center

- Publications
- Conferences
- Training



Advice Group

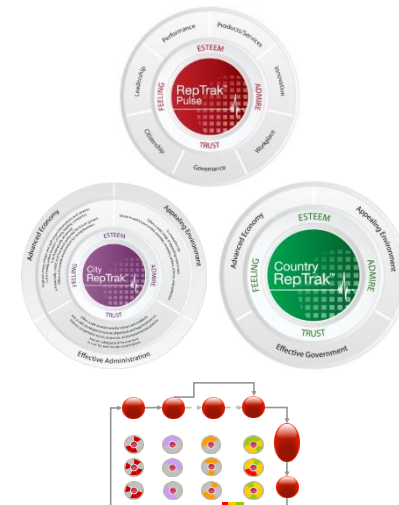
- Insight
- Strategy
- Activation



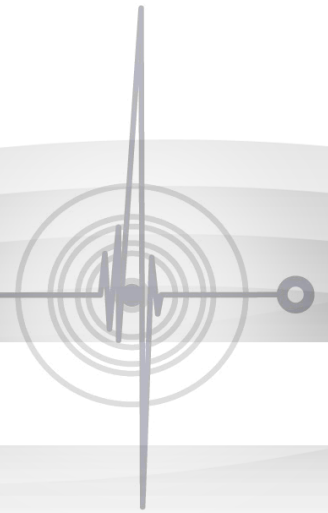
Reputation Institute

Our Global Value Proposition:

We enable leaders to make business decisions that build and protect reputation capital and drive competitive advantage.



Why are City Reputations Important?



Reputation Economy

- Economic climate leads to intensified **competition**
- Stakeholders are more informed and more **demanding**
- A **balanced** approach is the key to success



This is why places everywhere are competing for attention and business...

Nations



Regions



Cities



Like corporations, places need a strong reputation and a brand to stand out from the rest...

Places with great reputations **attract tourists...**



Brand differentiation **makes a place special....**



Ensures to attract **foreign knowledge workers...**



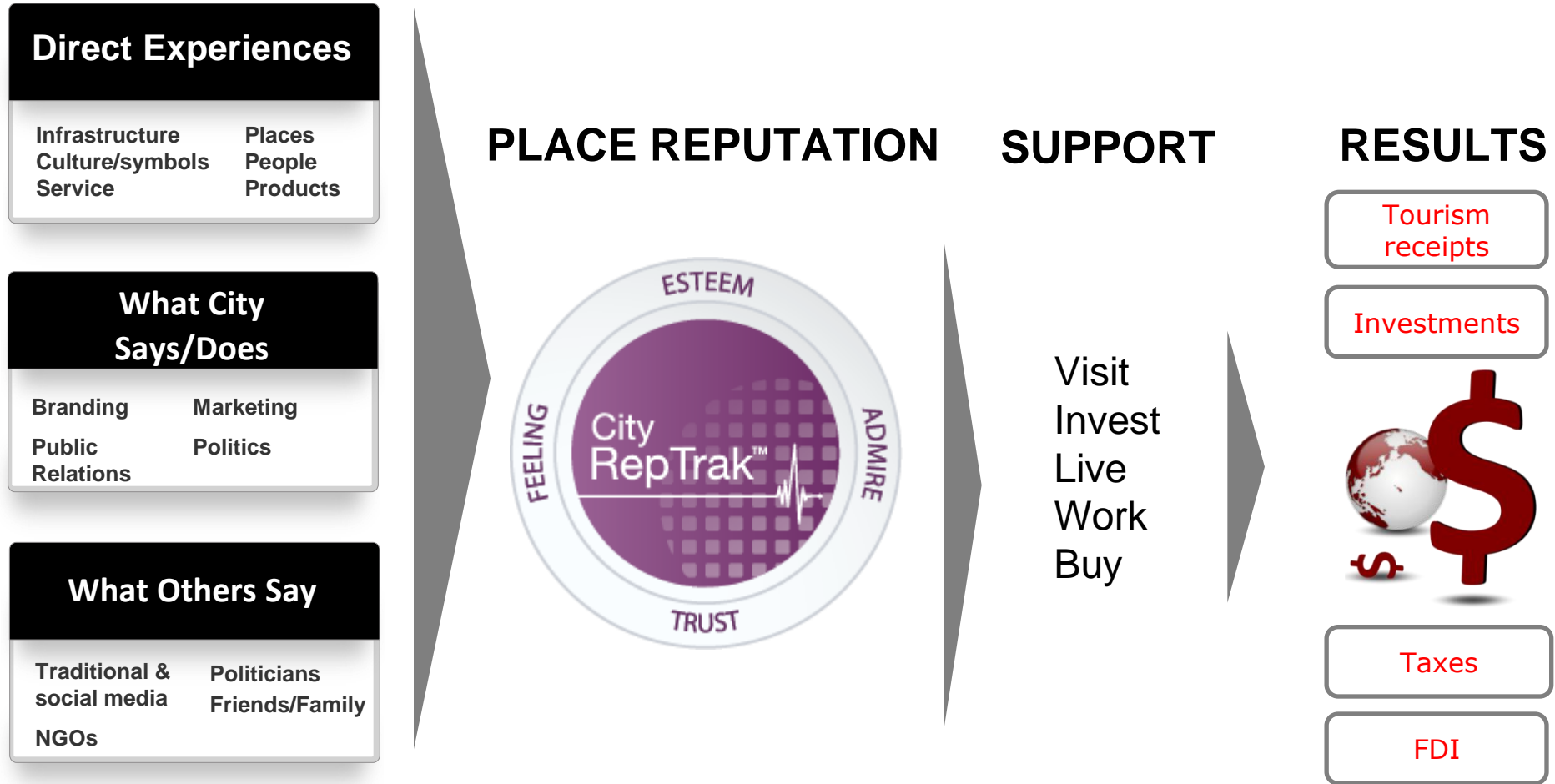
Places with positive reputations are more likely to **attract FDI...**



A positive place reputation **attracts business...**



The logic of creating stakeholder support and reputation capital...



Return on investment from a good place reputation

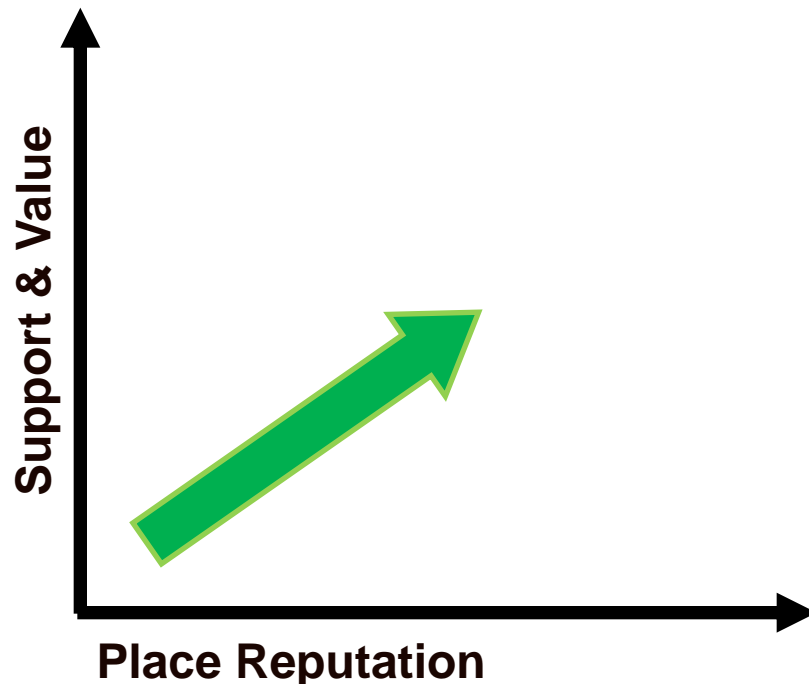


1

Very high correlation ($R^2 = 0.8$) between Reputation and people's willingness to: visit it, live in it, invest in it, buy products and services from it, study in it and work in it

2

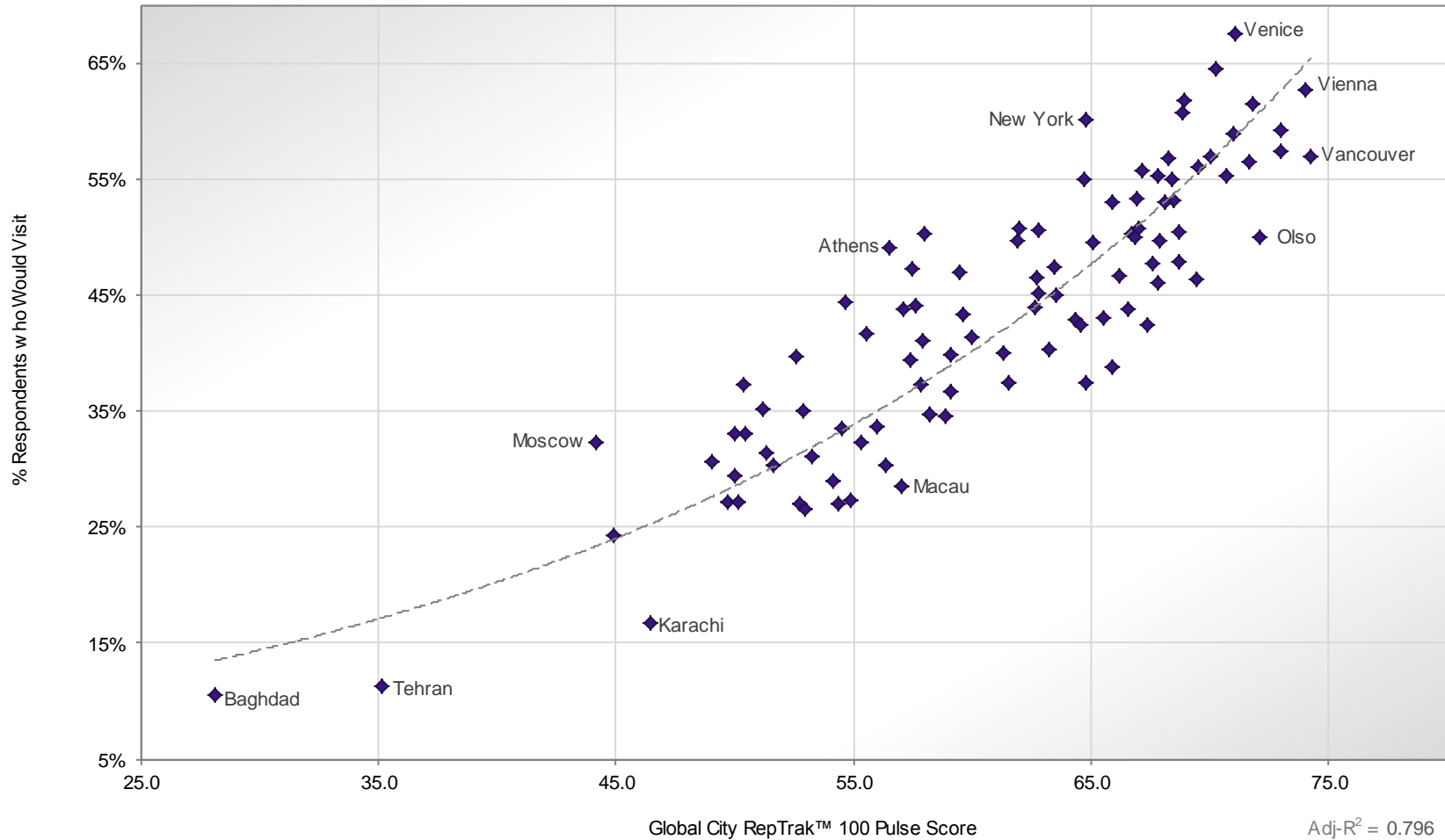
Direct link between reputation and money: A 5 point increase in place Reputation leads to 12% increase in Tourism Receipts and 7% increase in Foreign Direct Investment



Example:
*Increasing Austria's Reputation by 5 points will increase its tourism receipts by **\$2.4 billion***

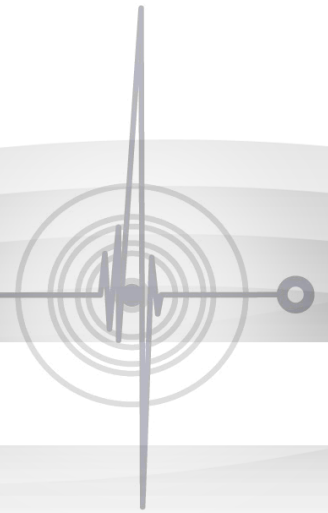
Meaning better reputation leads to stronger support

5 point improvement on City RepTrak™ score = 6.1% increase on “Willingness to Visit”



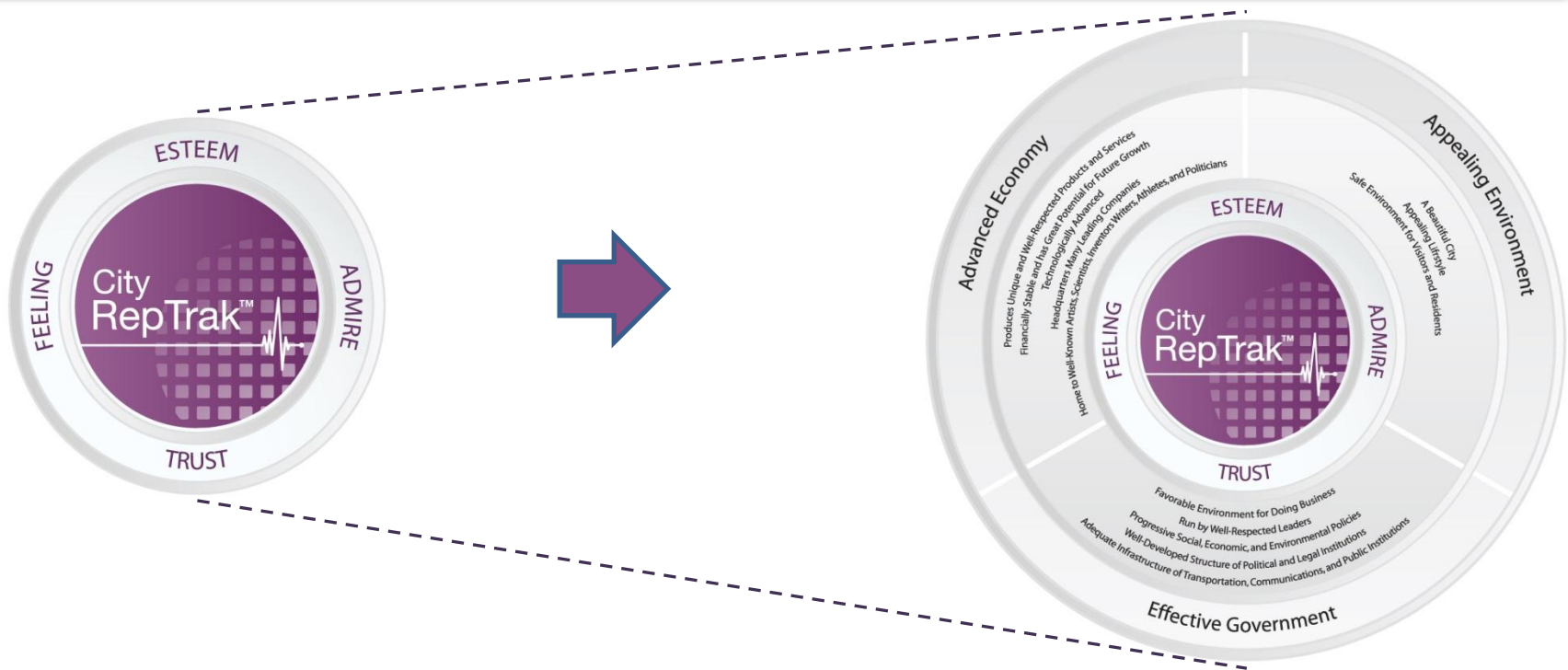
Reputations matter and are important
to manage to **create support** across
the whole **stakeholder ecosystem...**

The City RepTrak™ Model



City RepTrak™ - Deconstructing emotion...

- Reputation Institute has been measuring reputations rigorously since 1999. Our approach is based on a simplified and standardized model for measuring reputations internationally.
- **City RepTrak™ Pulse** – The beating heart of the model is the degree to which people **Trust, Admire, Respect** and have a **Good Feeling** for a place or their emotional bond to the country.
- Underlying the Pulse score are three dimensions that influence perceptions of a country and its reputation, or the rational bond between stakeholder and country. It is the importance of these 3 dimensions which drive country reputation and stakeholder support include **Advanced Economy, Appealing Environment and Effective Administration**.



Emotional

Rational explanation
of the emotional

City RepTrak™ Overview – The Model

Capturing Reputation: Cities cannot Manage what they don't Measure...

City RepTrak™ is a standardized scorecard that measures perceptions of cities based on key performance indicators designed to assess the relative appeal of the country to respondents on 13 characteristics organized into 3 dimensions

Advanced Economy

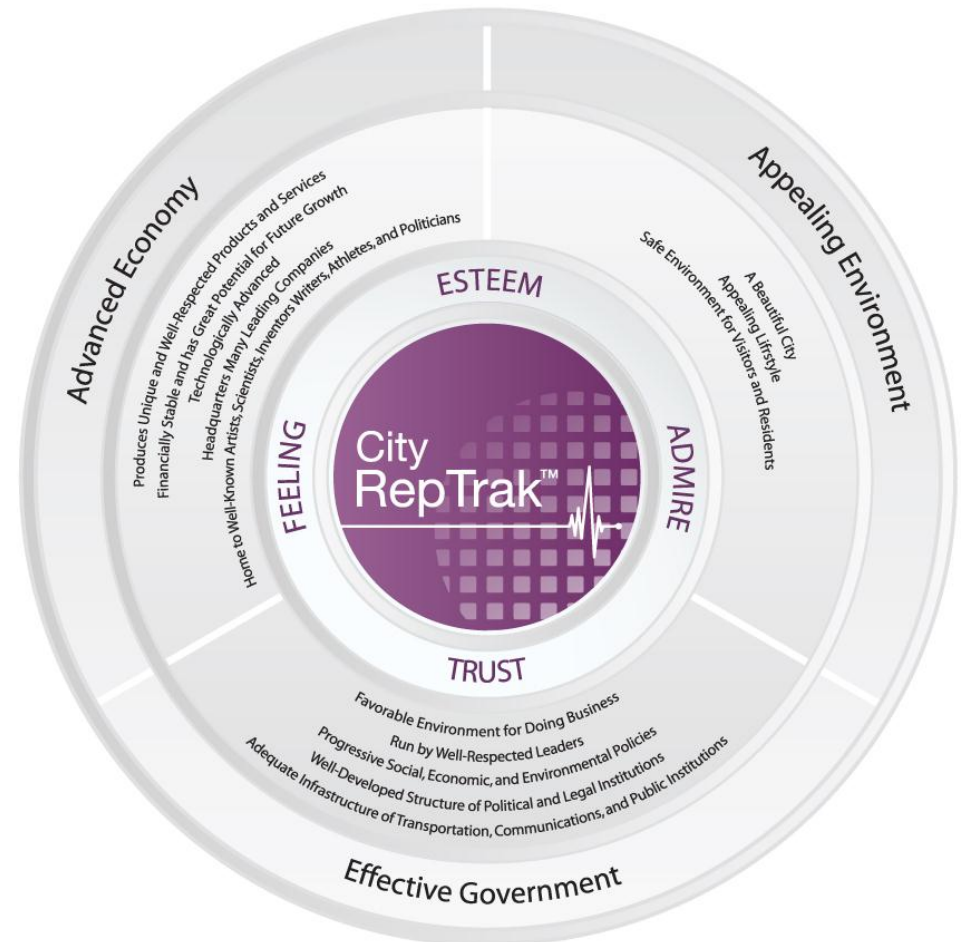
- Produces many unique and well-respected products and services
- Is the headquarters location of many leading companies
- Is technologically advanced
- Is financially stable and has great potential for future growth
- Offers a favorable environment for doing business

Appealing Environment

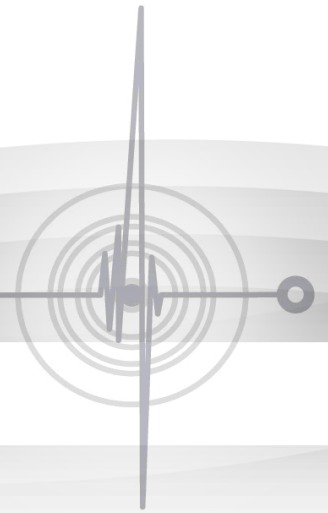
- Is a beautiful city
- Offers a wide range of appealing experiences, including food, sport, architecture, and entertainment
- Is home to many well-known artists, scientists, inventors, writers, athletes, and politicians

Effective Administration

- Offers a safe environment for visitors and residents
- Has a well-developed structure of political and legal institutions
- Follows progressive social, economic, and environmental policies
- Has an adequate infrastructure of transportation, communications, and public institutions
- Is run by well-respected leaders



About the Study



2012 City RepTrak Global Study Overview

- Online survey: April – May of 2012
- G8 general public - only people who were “somewhat” or “very” familiar
- Selection was based upon a combination of the following criteria:
(a) largest populations, (b) largest gross domestic product or GDP, (c) and cities which enjoy the highest amounts of tourism
- More than 18,000 people provided their ratings of the 100 cities included in the study

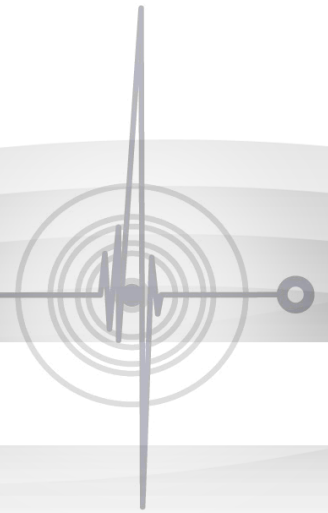
Nominated cities:

The List of Cities				
Abu Dhabi	Cape Town	Kiev	Moscow	Santo Domingo
Adelaide	Caracas	Kolkata/Calcutta	Mumbai	Sao Paulo
Amsterdam	Chicago	Kuala Lumpur	Munich	Seattle
Athens	Copenhagen	Las Vegas	Nairobi	Seoul
Atlanta	Dubai	Lima	New Delhi	Shanghai
Auckland	Dublin	Lisbon	New Orleans	Singapore
Baghdad	Edinburgh	London	New York	St.Petersburg
Bali	Florence	Los Angeles	Orlando	Stockholm
Bangkok	Frankfurt	Lyon	Osaka	Sydney
Barcelona	Geneva	Macau	Oslo	Taipei
Beijing	Guangzhou	Madrid	Paris	Tehran
Berlin	Hanoi	Manila	Perth	Tel Aviv
Bogota	Helsinki	Mecca	Port-au-Prince	Tokyo
Boston	Hong Kong	Melbourne	Prague	Toronto
Brisbane	Houston	Mexico City	Rio de Janeiro	Vancouver
Brussels	Istanbul	Miami	Rome	Venice
Budapest	Jakarta	Milan	Ryad	Vienna
Buenos Aires	Jerusalem	Monterrey	San Francisco	Warsaw
Cairo	Johannesburg	Montevideo	San Juan	Washington DC
Cancún	Karachi	Montreal	Santiago	Zurich

G8 general public:



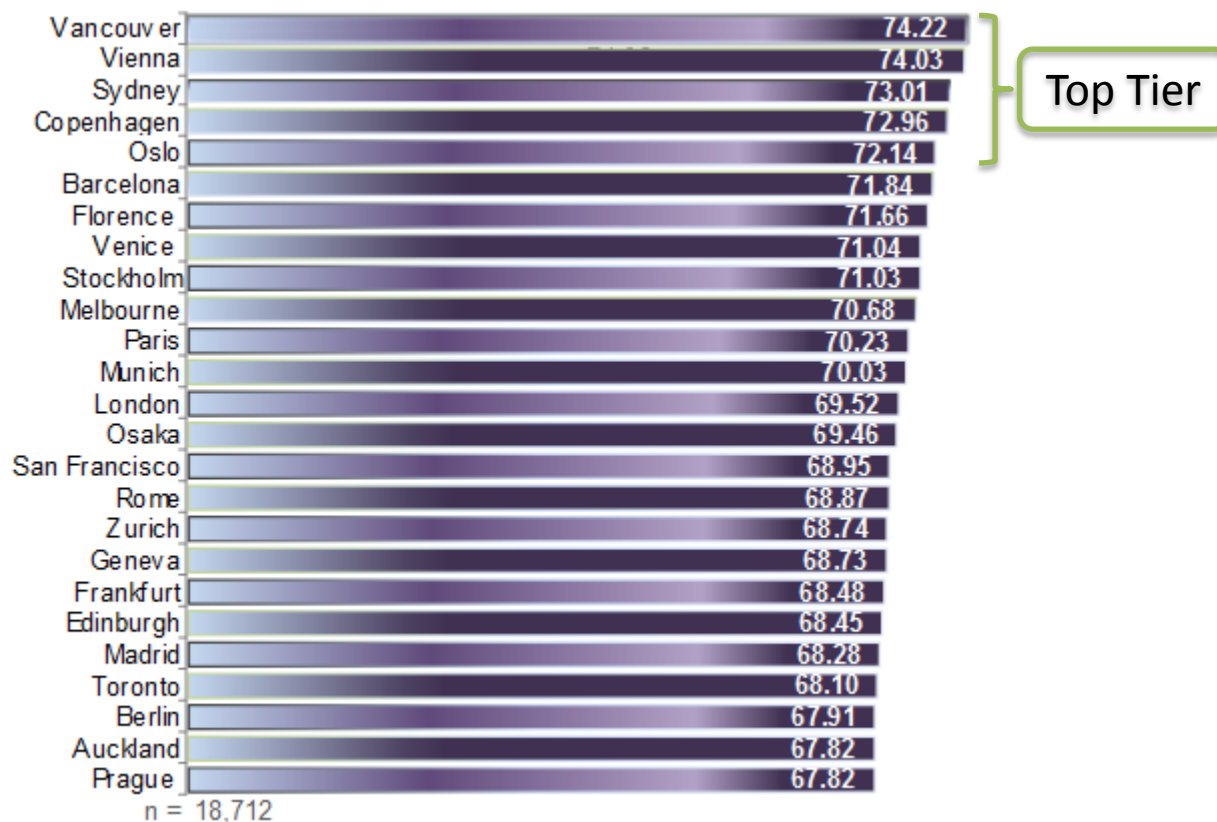
2012 City RepTrak™ Results



City RepTrak™ 2012

The Most Reputable Cities in the World

Ranking of Cities (1-25)



“A strong city reputation builds stakeholder support, making Vancouver a city people will recommend as a place to visit, invest in, live in and work in.”

*--Nicolas Trad,
Executive Partner,
Reputation Institute*

Excellent/Top Tier	Above 80
Strong/Robust	70-79
Average/Moderate	60-69
Weak/Vulnerable	40-59
Poor/Bottom Tier	Below 40

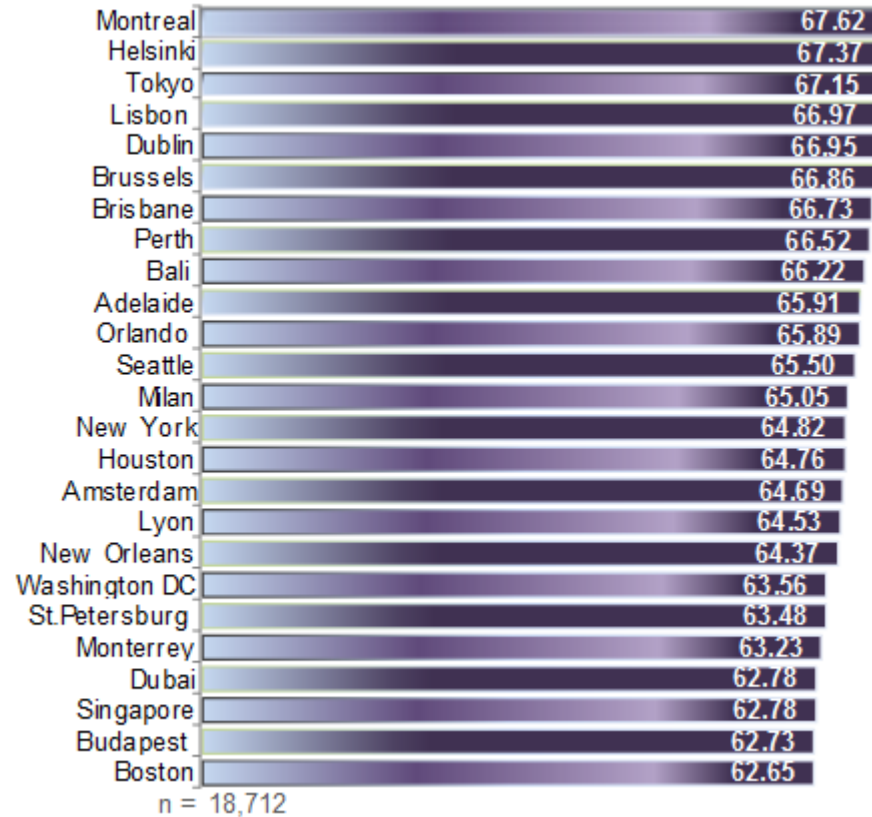
All Global City RepTrak™ Pulse scores that differ by more than +/-2.6 are significantly different at the 95% confidence level.

Pulse scores are based on questions measuring Trust, Admiration & Respect, Good Feeling and Overall Esteem (captured in the Pulse score on a 0-100 scale).

City RepTrak™ 2012

The Most Reputable Cities in the World

Ranking of Cities (26-50)



Excellent/Top Tier Above 80
Strong/Robust 70-79
Average/Moderate 60-69
Weak/Vulnerable 40-59
Poor/Bottom Tier Below 40

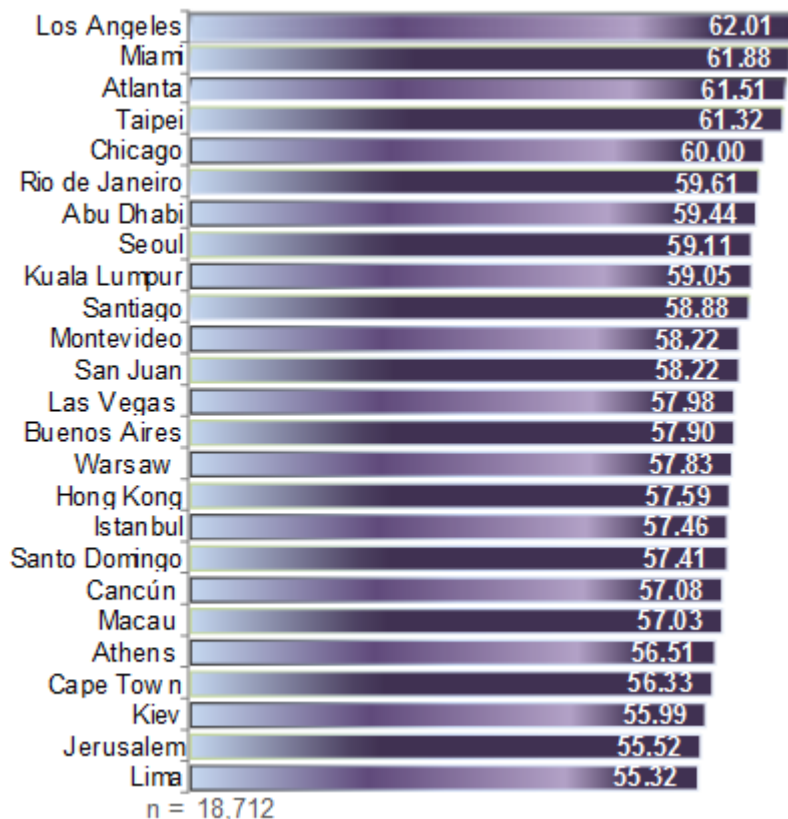
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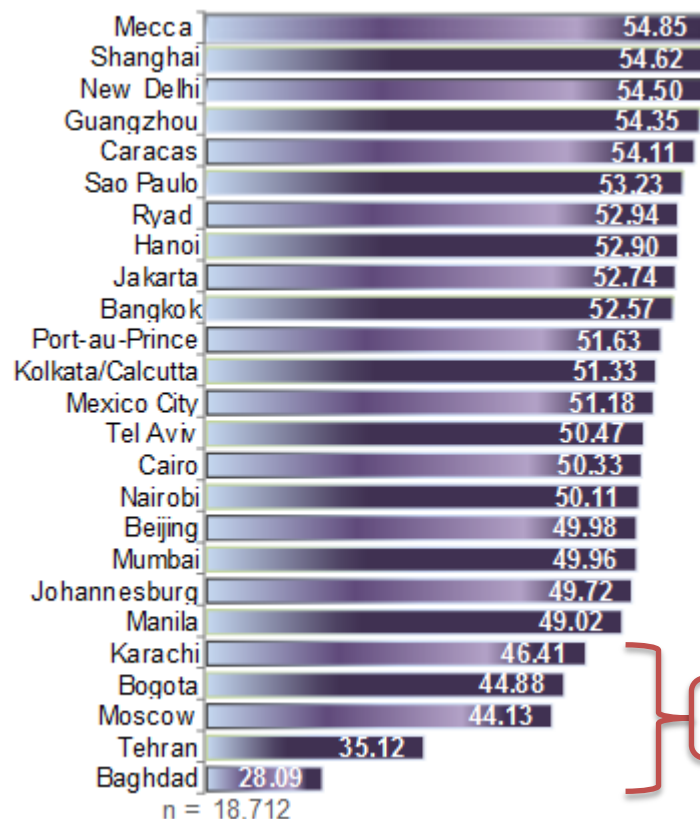
City RepTrak™ 2012

The Most Reputable Cities in the World

Ranking of Cities (51-75)



Ranking of Cities (76-100)



Excellent/Top Tier Above 80
Strong/Robust 70-79
Average/Moderate 60-69
Weak/Vulnerable 40-59
Poor/Bottom Tier Below 40

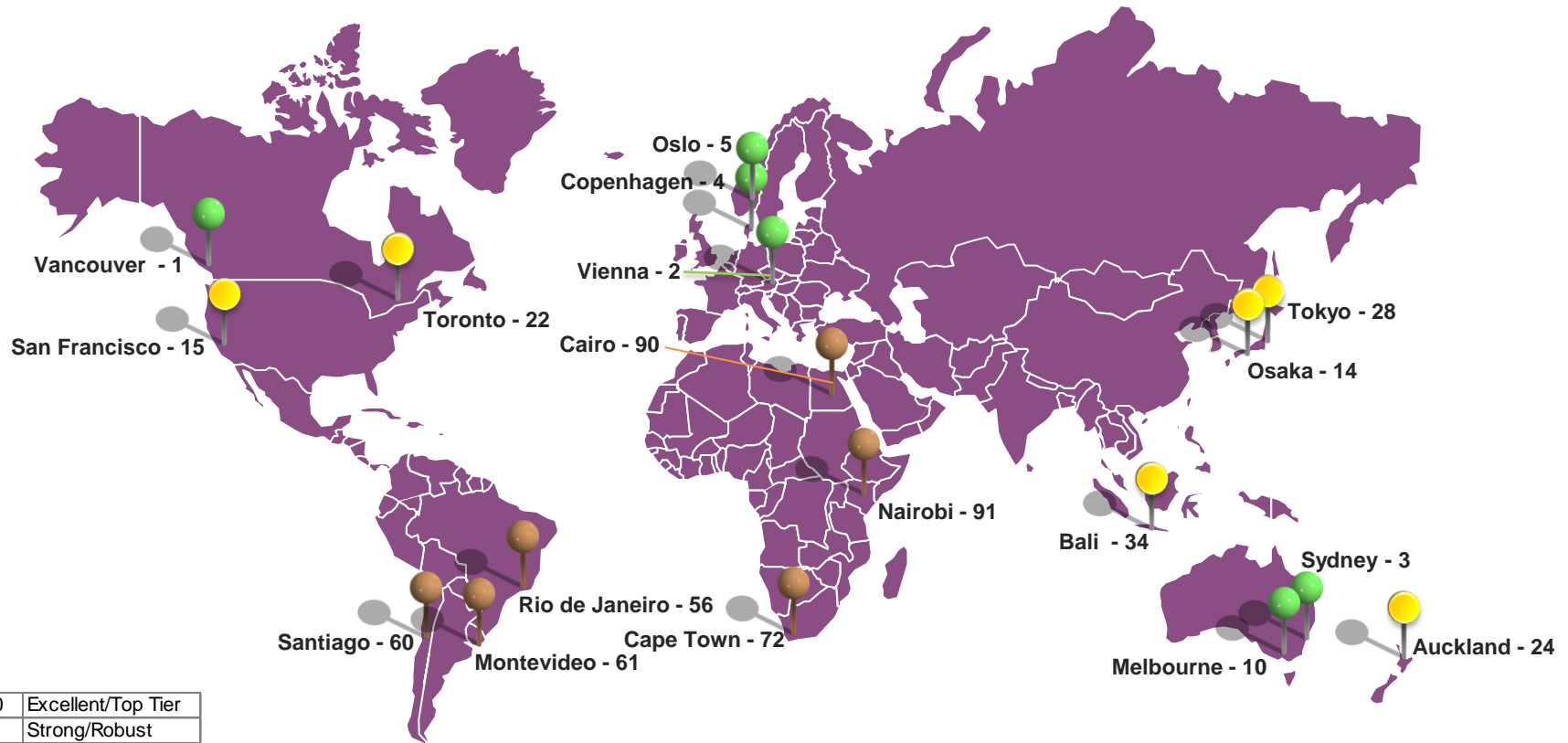
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Pulse scores are based on questions measuring Trust, Admiration & Respect, Good Feeling and Overall Esteem (captured in the Pulse score on a 0-100 scale).

Top 3 Ranking Cities per region

Europe – 66.32
Oceania – 64.84
North America – 62.39

South America – 55.27
Asia – 54.59
Africa – 51.62



Above 80	Excellent/Top Tier
70-79	Strong/Robust
60-69	Average/Moderate
40-59	Weak/Vulnerable
Below 40	Poor/Bottom Tier

Gap Between City RepTrak Scores & Home Country RepTrak Scores

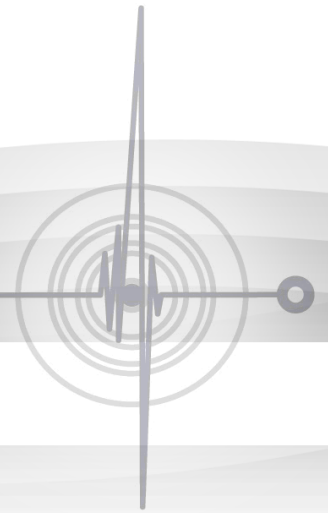
Most cities seem to successfully overcome national associations and win a better reputation than their home countries. However, the most reputable countries outperform their cities. Cities should learn how to emphasize or play down national associations to leverage strengths and avoid weaknesses.

- Nicolas G. Trad, Executive Partner, Reputation Institute

City [Sorted by Gap]	Scores		Gaps vs.
	City RepTrak™	Home Country Pulse Score	
St.Petersburg (Russia)	63.48		26.7
Karachi (Pakistan)	46.41		19.8
Mecca (Saudi Arabia)	54.85		18.1
Hong Kong (China)	57.59		17.9
Monterrey (Mexico)	63.23		17.7
Macau (China)	57.03		17.3
Riyadh (Saudi Arabia)	52.94		16.2
San Francisco (U.S.)	68.95		15.0
Shanghai (China)	54.62		14.9
Guangzhou (China)	54.35		14.6
Kiev (Ukraine)	55.99		14.2
Tehran (Iran)	35.12		13.8
Athens (Greece)	56.51		13.2
Istanbul (Turkey)	57.46		13.1
Florence (Italy)	71.66		12.7
Jerusalem (Israel)	55.52		12.5
Dubai (UAE)	62.78		12.2
Venice (Italy)	71.04		12.0
Orlando (U.S.)	65.89		11.9
Cancun (Mexico)	57.08		11.6
Seattle (U.S.)	65.50		11.6
Seoul (South Korea)	59.11		11.3
Santiago (Chile)	58.88		11.3
New York (U.S.)	64.82		10.9
Houston (U.S.)	64.76		10.8
New Orleans (U.S.)	64.37		10.4
Beijing (China)	49.98		10.3
Taipei (Taiwan)	61.32		10.2
Lisbon (Portugal)	66.97		9.9
Rome (Italy)	68.87		9.9
Caracas (Venezuela)	54.11		9.6
Washington DC (U.S.)	63.56		9.6
Paris (France)	70.23		9.1
San Juan (Puerto Rico)	58.22		9.0
Abu Dhabi (UAE)	59.44		8.8
Cape Town (South Africa)	56.33		8.8
Boston (U.S.)	62.65		8.7
Barcelona (Spain)	71.84		8.5
Los Angeles (U.S.)	62.01		8.1
Miami (U.S.)	61.88		7.9
Baghdad (Iraq)	28.09		7.8
Atlanta (U.S.)	61.51		7.6
Tel Aviv (Israel)	50.47		7.5
Bogota (Colombia)	44.88		7.4
Moscow (Russia)	44.13		7.4

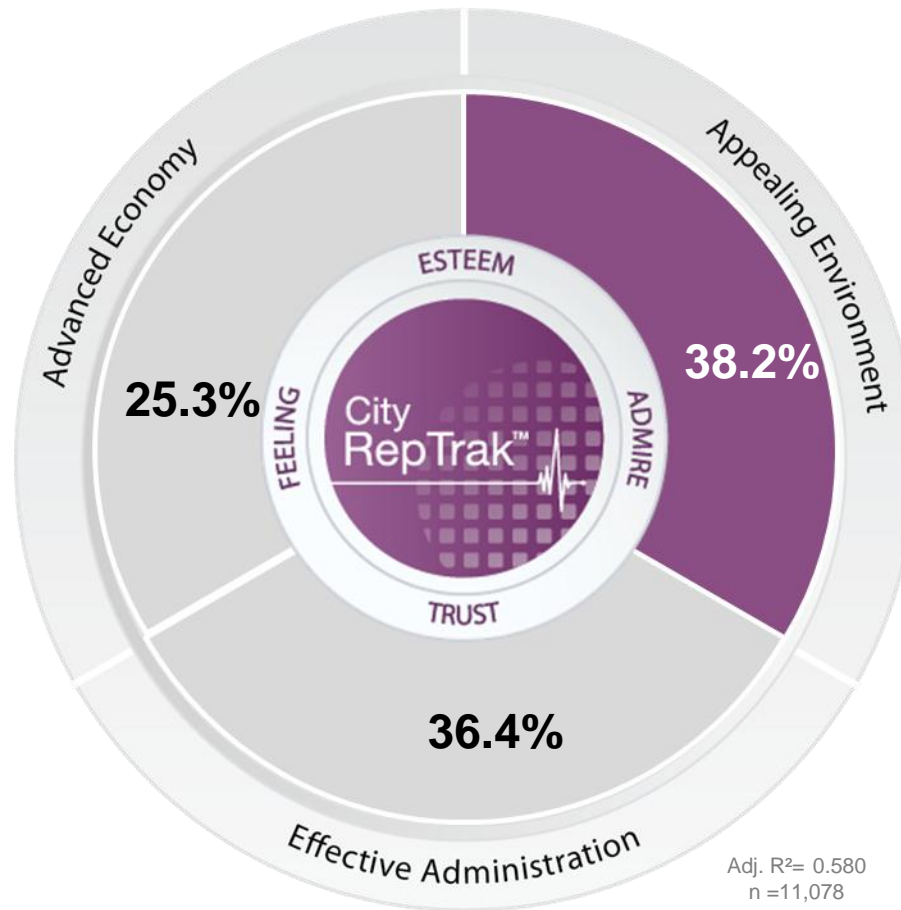
City [Sorted by Gap]	Scores		Gaps vs.
	City RepTrak™	Home Country Pulse Score	
Cairo (Egypt)	50.33		7.1
Port-au-Prince (Haiti)	51.63		6.8
Buenos Aires (Argentina)	57.90		6.5
Singapore (Singapore)	62.78		6.1
Chicago (U.S.)	60.00		6.1
Milan (Italy)	65.05		6.1
Warsaw (Poland)	57.83		6.0
Mexico City (Mexico)	51.18		5.7
Madrid (Spain)	68.28		4.9
Rio de Janeiro (Brazil)	59.61		4.2
Las Vegas (U.S.)	57.98		4.0
London (U.K.)	69.52		3.8
Munich (Germany)	70.03		3.7
Vienna (Austria)	74.03		3.5
Lyon (France)	64.53		3.4
Osaka (Japan)	69.46		3.2
Edinburgh (U.K.)	68.45		2.7
New Delhi (India)	54.50		2.6
Johannesburg (South Africa)	49.72		2.2
Frankfurt (Germany)	68.48		2.2
Lima (Peru)	55.32		2.0
Berlin (Germany)	67.91		1.6
Dublin (Ireland)	66.95		1.3
Copenhagen (Denmark)	72.96		1.2
Brussels (Belgium)	66.86		1.1
Tokyo (Japan)	67.15		0.9
Kolkata/Calcutta (India)	51.33	-0.6	
Bangkok (Thailand)	52.57	-1.4	
Oslo (Norway)	72.14	-1.8	
Mumbai (India)	49.96	-2.0	
Sao Paulo (Brazil)	53.23	-2.2	
Sydney (Australia)	73.01	-2.2	
Vancouver (Canada)	74.22	-3.5	
Stockholm (Sweden)	71.03	-4.1	
Melbourne (Australia)	70.68	-4.5	
Helsinki (Finland)	67.37	-4.7	
Amsterdam (Netherlands)	64.69	-4.8	
Auckland (New Zealand)	67.82	-5.1	
Zurich (Switzerland)	68.74	-6.0	
Geneva (Switzerland)	68.73	-6.1	
Brisbane (Australia)	66.73	-8.5	
Perth (Australia)	66.52	-8.7	
Adelaide (Australia)	65.91	-9.3	
Toronto (Canada)	68.10	-9.7	
Montreal (Canada)	67.62	-10.2	

Drivers of City Reputation



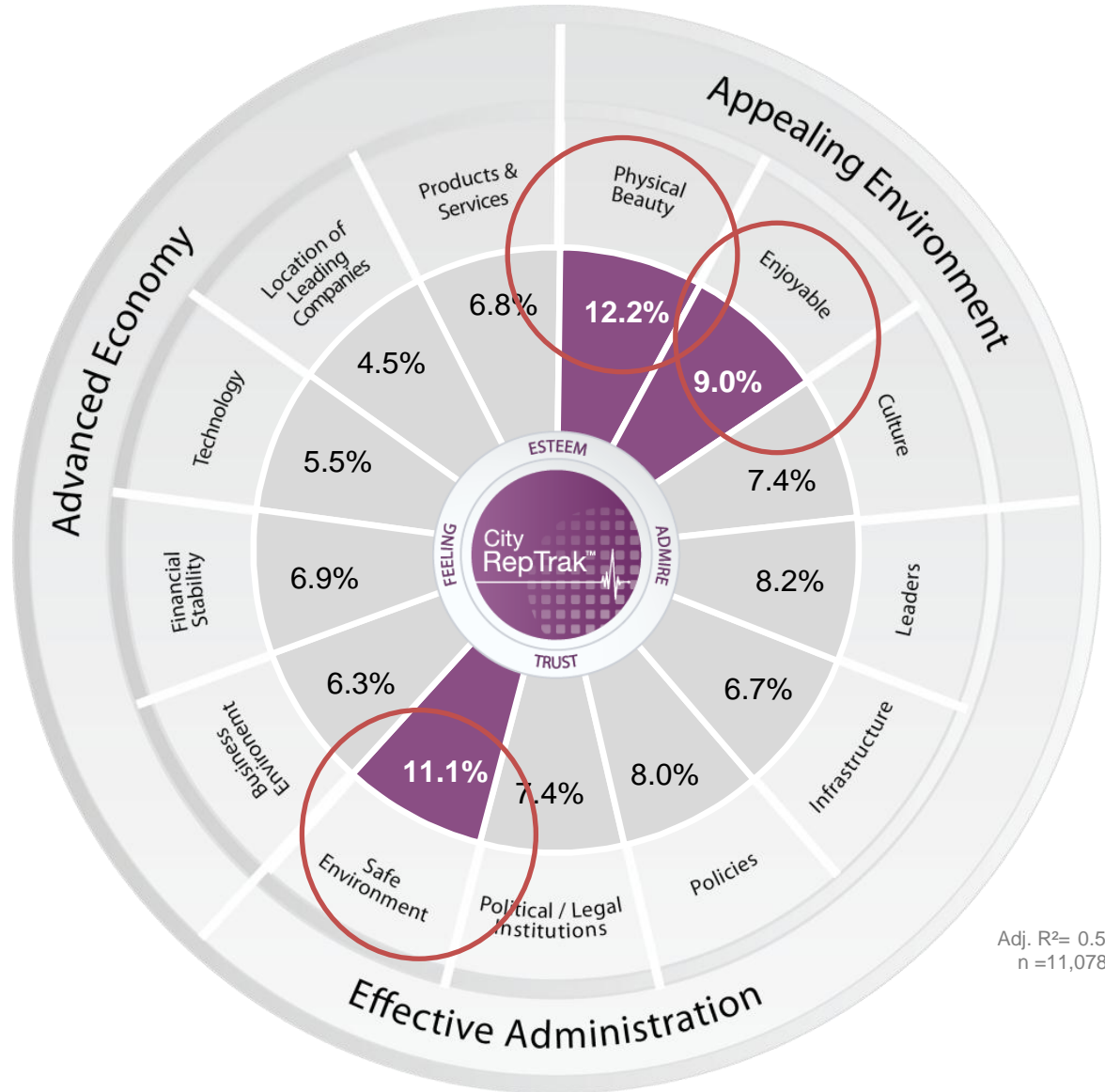
What drives reputations of cities? (dimensions)

Cities' general appeal counts for more than their economic advantages in driving overall reputation – among the general public



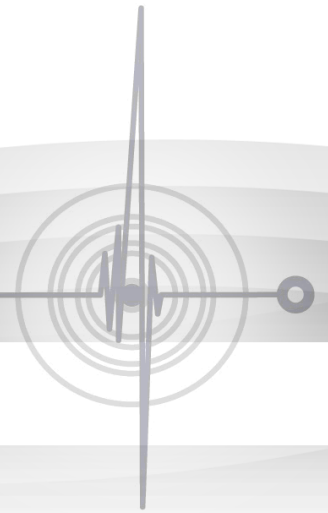
What drives reputations of cities? (attributes)

Most impactful attributes within Appeal and Administration, but all attributes are fairly balanced in impacting overall reputation



Adj. R²= 0.592
n =11,078

Supportive Behaviors

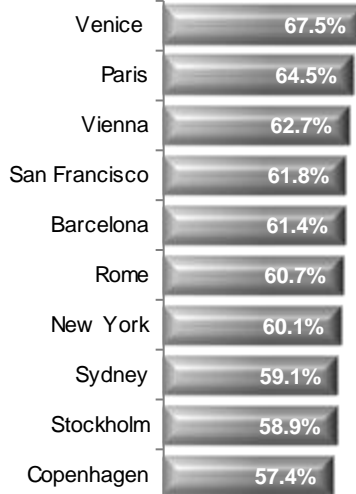


Which Cities are the Most Attractive for Key Supportive Behaviors

Most Likely to Support

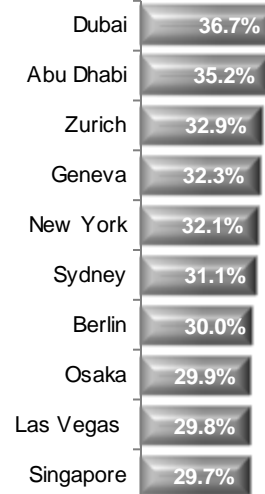
The general public within the G8 were surveyed based upon their perception of which cities are the most attractive to Visit, Invest, Live, Work and Buy From. The charts below represent the top 10 rankings of cities based upon each of the supportive behavioral statements we measured towards the 100 cities included in our study.

Visit



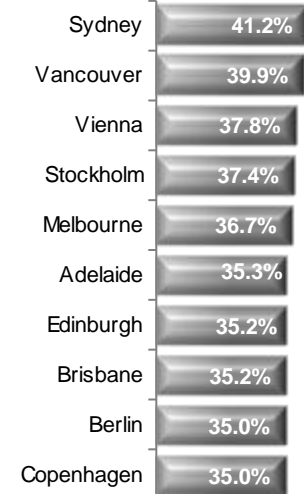
"...Recommend as a place to Visit"

Invest



"...Recommend as a place to Invest"

Live



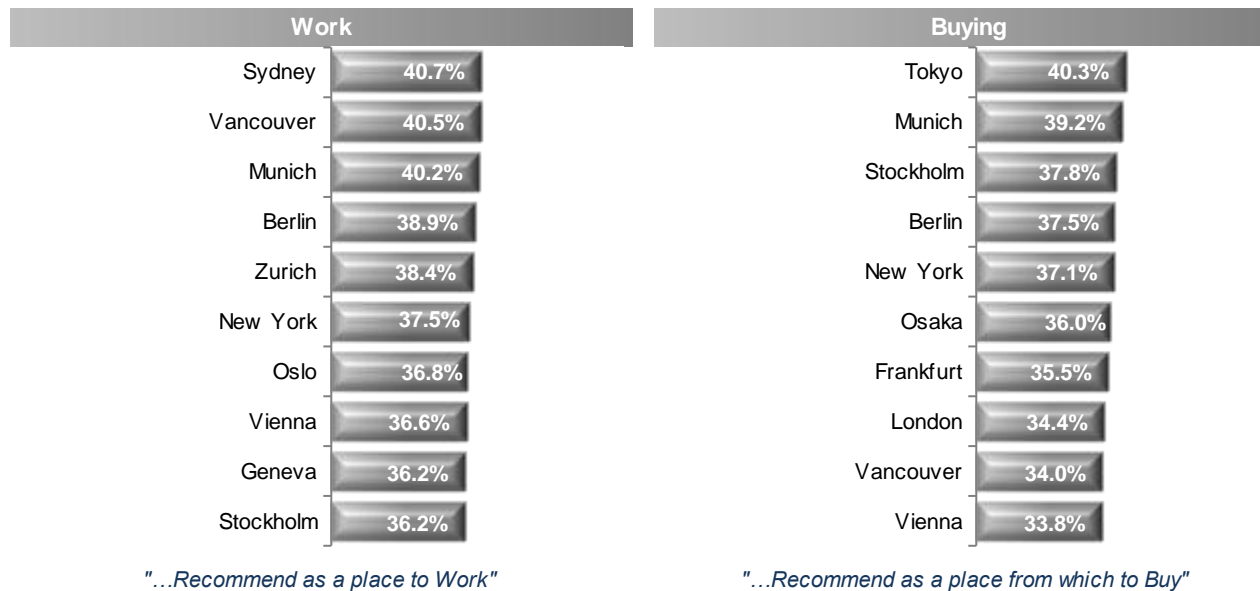
"...Recommend as a place to Live"

Q3512: Please enter a number from "1" to "7" where "1" means "I strongly disagree" and "7" means "I strongly agree".

Which Countries are the Most Attractive for Key Supportive Behaviors? Continued...

When people trust, admire and have a good feeling about a country, not only are they more likely to recommend key supportive behaviors to others, people are also more likely to give a city the benefit of the doubt in a time of crisis. We see a strong pattern between reputation and support, demonstrating that building a favorable reputation platform should be a part of a country's overall strategy.

--Nicolas G. Trad, Executive Partner, Reputation Institute

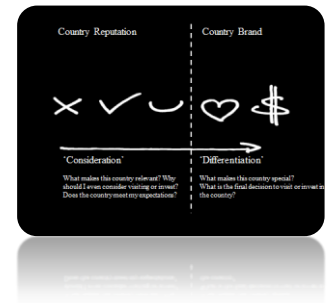


Q3512: Please enter a number from "1" to "7" where "1" means "I strongly disagree" and "7" means "I strongly agree".

City Reputation & Brand Management: Best Practices

In order to work strategically with your reputation and brand you should

- + Understand perceptions and drivers among your stakeholders
- + Identify your competitive strengths and point of difference
- + Define Brand & Reputation strategy
- + Align activities with your strategy and stakeholder expectations
- + Build KPIs to ensure accountability
- + Monitor success on an ongoing basis



Thank You

About Reputation Institute

Reputation Institute is the world's leading corporate reputation consulting firm. Founded in 1997 with a presence in 30 countries, Reputation Institute is the pioneer in reputation management. Through systematic research and analysis, Reputation Institute supports companies in building comprehensive strategies and making operational decisions that align stakeholders with corporate objectives and create tangible economic value. Reputation Institute enables leaders to make business decisions that build and protect reputational capital and drive competitive advantage. For more information, visit: www.reputationinstitute.com.

Start the conversation now

For city specific results: cityretrak@reputationinstitute.com

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