

ING GLOBAL CITIES
DIGITAL VISIBILITY SERIES
2021

The UK's most talked about cities

2021

THE POWER OF NETWORKS

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The UK's most talked about cities

ING Media's global exploration into the impact of digital visibility on cities enters its third year. The data indicates that cities with fewer mentions across social media and online news tend to attract less investment, that digital visibility and global cities rankings converge over time, and that cities that work together outperform those that do not. However, the impact of the pandemic is unclear, with many rankings paused or not yet reflecting change. In this context digital visibility's importance as a data point may be amplified in the short term.

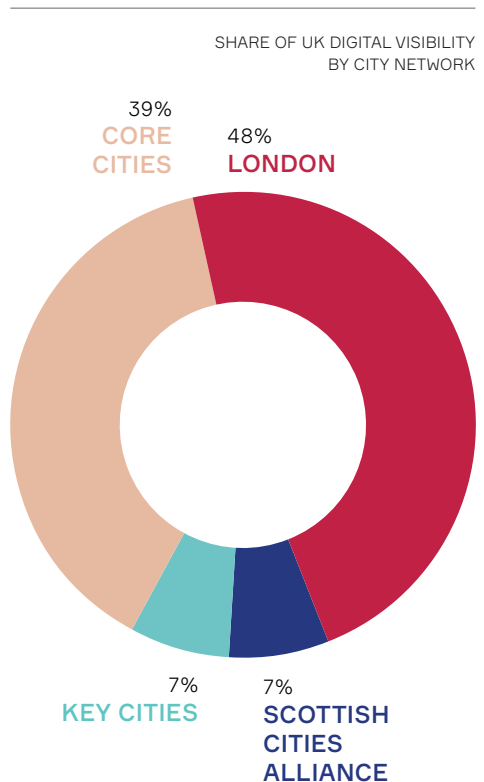
As cities negotiate recovery and new forms of competition and change, knowing how to strategically work together may be of increasing importance. This edition focuses on the power of networks in the UK and explores how the reach and shape of a place's conversations may provide an even stronger indicator of investment potential.

This edition is produced in partnership with Key Cities, a diverse network covering almost half the UK's urban areas. It identifies where the UK's brand assets are concentrated and how cities may work together more strategically to support the UK's economic recovery and future prosperity.

"ING works with two of the UK's three most important city networks, and with many cities in the UK and internationally. It is an unusual moment of solidarity for cities, almost all part of the same cycle of pause and reboot. We want cities to recover quickly and believe this kind of data, and leveraging the power of networks, is key to achieving their ambitions."

The power of networks

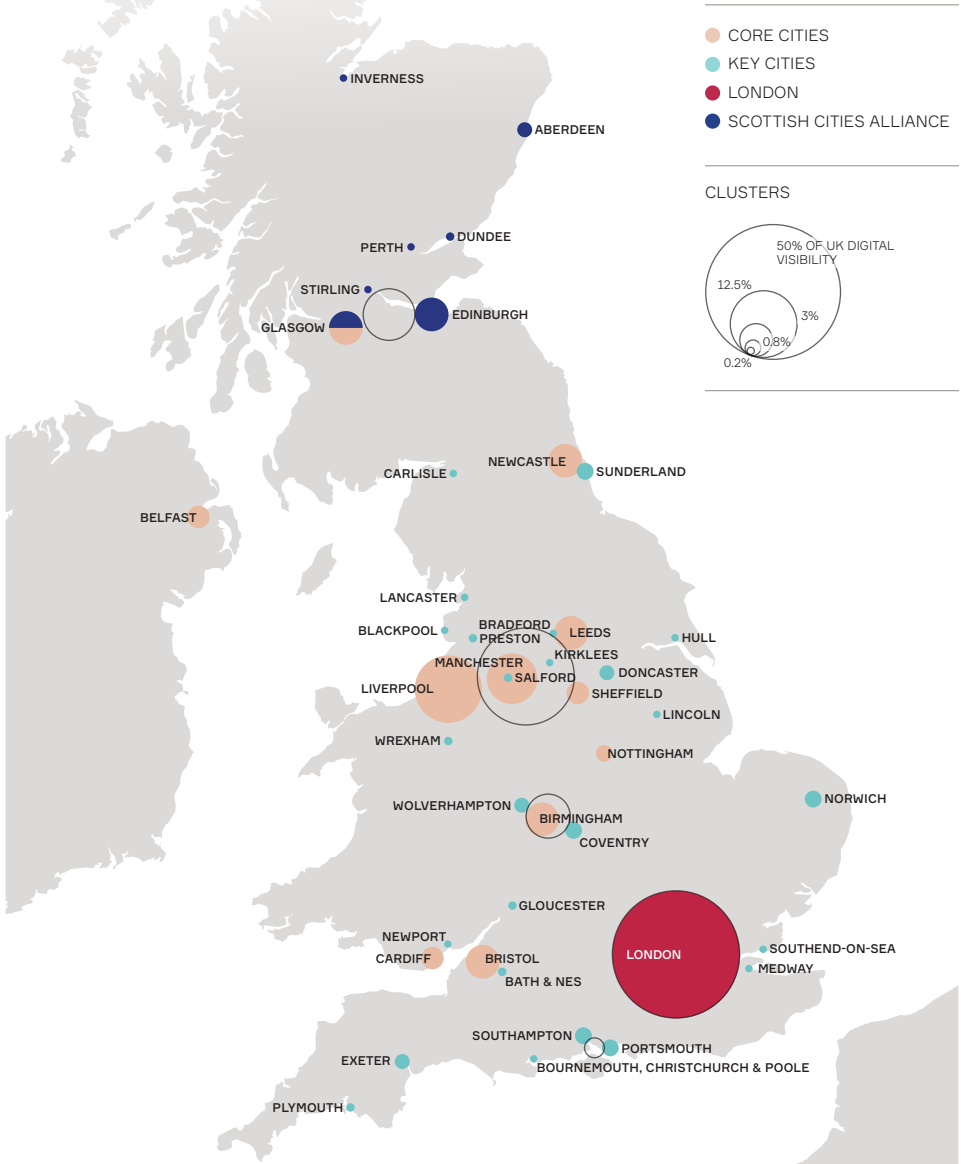
Core Cities (11 members), Key Cities (25) and the Scottish Cities Alliance (7) are the UK's three most important city networks. Their combined digital visibility provides the UK with a global competitive advantage, with only the USA, China and Japan producing greater visibility. London, which is able to consistently touch conversations internationally more than any other city globally, acts as a network in its own right. However, London still requires support to match the visibility of cities like New York City and Tokyo. Similarly, Core Cities' combined visibility is comparable to cities like Hong Kong, Paris or Madrid, all in the top 10 globally. Key Cities and Scottish Cities, networks made up mostly of smaller cities, can comfortably compete with places like Sydney or Detroit. However, many of the UK's cities will need to harness networks to keep ahead of cities rapidly consolidating leads in other parts of the world.



The UK's digital visibility clusters

London is the UK's most significant digital visibility cluster, however, the north of England, followed by Scotland's first and second cities and the West Midlands are also significant concentrations. Liverpool and Manchester together are responsible for one in every five mentions for

UK cities, suggesting consolidation of the networks around these cities could provide a significant counter-weight to London. Many smaller cities benefit from proximity to wider geographic activity or membership to regional or national networks.



UK cities by share of digital visibility

The UK hosts many of the world's most visible cities. The graph below plots how each UK city network uniquely contributes to the country's global profile.

SHARE OF TOTAL DIGITAL VISIBILITY (IN PER CENT)

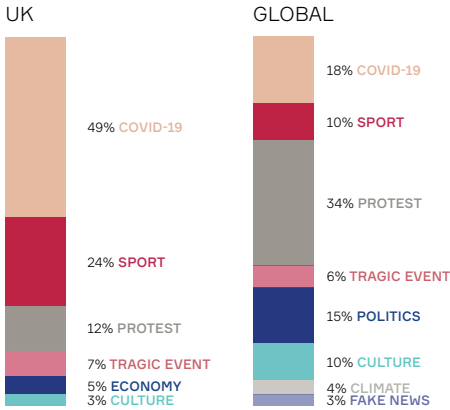
1	LONDON	49.0
2	LIVERPOOL	12.5
3	MANCHESTER	7.4
4	BIRMINGHAM	3.2
5	BRISTOL	3.0
6	GLASGOW	3.0
7	EDINBURGH	2.9
8	NEWCASTLE	2.4
9	LEEDS	2.2
10	SHEFFIELD	2.0
11	BELFAST	1.7
12	CARDIFF	1.3
13	NOTTINGHAM	1.0
14	SOUTHAMPTON	0.9
15	NORWICH	0.9
16	SUNDERLAND	0.6
17	COVENTRY	0.6
18	PORTSMOUTH	0.6
19	ABERDEEN	0.5
20	WOLVERHAMPTON	0.5
21	EXETER	0.5
22	DONCASTER	0.4
23	SALFORD	0.3
24	GLOUCESTER	0.3
25	DUNDEE	0.3
26	WREXHAM	0.2
27	BATH	0.2
28	PLYMOUTH	0.2
29	PRESTON	0.2
30	STIRLING	0.1
31	BRADFORD	0.1
32	INVERNESS	0.1
33	MEDWAY	0.1
34	HULL	0.1
35	LINCOLN	0.1
36	BLACKPOOL	0.1
37	LANCASTER	0.1
38	NEWPORT	0.1
39	KIRKLEES	0.1
40	CARLISLE	0.1
41	PERTH	0.03
42	SOUTHEND-ON-SEA	0.03
43	BOURNEMOUTH (BCP)	0.01

- London is the UK's most important network, contributing towards every UK city's digital visibility. Liverpool and Manchester together support in a similar way, but for fewer than half of the UK's cities.
- Despite a 20% drop in London's social media mentions during 2020, the capital leads for mentions on news, Twitter, Facebook, Reddit, YouTube, Instagram, forums, blogs, reviews and comments. Cities with comparatively high mentions include Coventry (news), Stirling (forums) and Dundee (comments).
- The relative change in digital visibility for UK cities was far greater during 2020 than in previous years, with smaller cities more able to increase their visibility. Newcastle and Bristol were the most significant movers.
- Cities ranked highly for digital visibility also register higher GDP, suggesting that growing profile and increasing content entry points are key to realising ambitions.
- While the UK is the most important source of traffic talking about UK cities, the USA is also significant, followed by Canada and Japan. The majority of cities in the UK are, however, not generating significant international mentions.
- 86% of mentions are in English with few cities strategically developing foreign language content. Key other languages for attracting digital visibility are Spanish, French, German, Chinese and Arabic.

Top trending topics

The UK's trending topics were less diverse than for cities globally, with the pandemic crowding out conversations around culture, climate and politics to a greater extent.

TOP TRENDING TOPICS IN THE UK VS GLOBAL



In London, for example, the concentration of COVID-19 related content and reduced social media mentions, effectively halved the city's opportunities to tell both its own story, and to amplify the stories of other UK cities. Recovery will require diversifying content opportunities for cities across the UK.

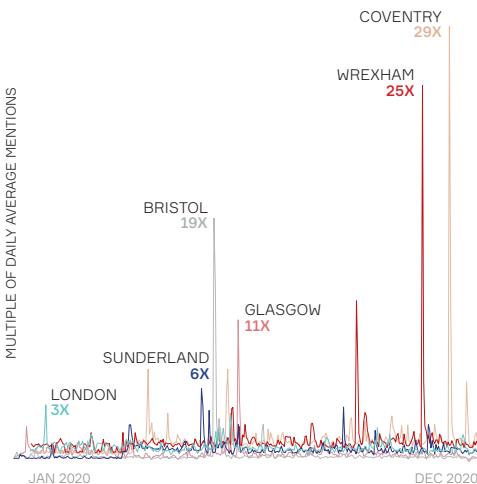
While the trending of protest activity and sport were to be expected as the only major live activities in most cities around the world, sport was more than twice as likely to trend in UK cities than globally. This suggests UK cities had comparatively less diverse content.

UK cities, despite ambitious commitments, are not significantly impacting conversations around climate. However, Glasgow, ahead of COP26, has begun generating several smaller spikes around climate.

Some leading cities globally are experimenting with using live campaigns to respond to the lack of quality content available on places. As cities reopen, more will likely invest in resident user generated content, use tourism marketing spend to reboot broader objectives, and invest in live and networked content. Data to benchmark targeting against existing network reach and that of partner cities and competitors may become increasingly relevant to achieving ambitions.

Exploring trends

Prior to the pandemic, conversations around sport shrunk year-on-year in favour of conversations around politics and culture. This pattern reversed during 2020. Below are profile graphs for the highest peaks across last year's top trending topics.



- The first vaccines, administered in Coventry and a national event, generated the highest spike for any UK city. However, most COVID-19 conversations were localised. A London school pupil, told that Inverness was the closest testing centre, highlighted the capital's capacity to drive trends in other cities.
- Stars Ryan Reynolds and Rob McElhenney's purchase of Wrexham AFC expanded the network reach of the Welsh city. Southampton, Leeds and Liverpool also trended for sport, but within more traditional networks.
- Black Lives Matter protests made up the single largest trending event in cities globally during 2020. The toppling of a statue of a 17th century slave trader in Bristol was one of the UK's top trends.
- Nissan's commitment to continue producing cars in Sunderland was a rare instance of a city's productive capacity trending, but also a networked event given plant closures in Spain and Indonesia.
- High trends in London are infrequent given the density of messaging around the capital. However, that its top trend was for a global art project hosted at the Serpentine Galleries and promoted by a South Korean band shows the power of internationally networked culture.

Comparing UK city networks

This chart plots the capacity cities have to impact global conversations. The scale of a city's visibility and conversation alignment is not the only strategic consideration when selecting a city to partner with. Designing campaigns to leverage and target each city's unique networks will likely improve success. London's leading global reach creates an extraordinary network opportunity for every UK city, followed by Core Cities, Key Cities and the Scottish

Cities Alliance. Glasgow's hosting of COP26 has elevated it to the top city across two UK networks for impacting conversations in cities internationally, while Belfast's proximity to Dublin mimics a Europe-wide pattern where cities in smaller nations benefit from regional networks. Perth and Kirklees are highly reliant on other cities to tell their stories and may benefit most from strategic in-network partnerships to amplify their reach.

CORE CITIES

Local authorities: 11
 Population: 6 million
 Strategic reach:
 4 countries
 Most in-network reach:
 Manchester

KEY CITIES

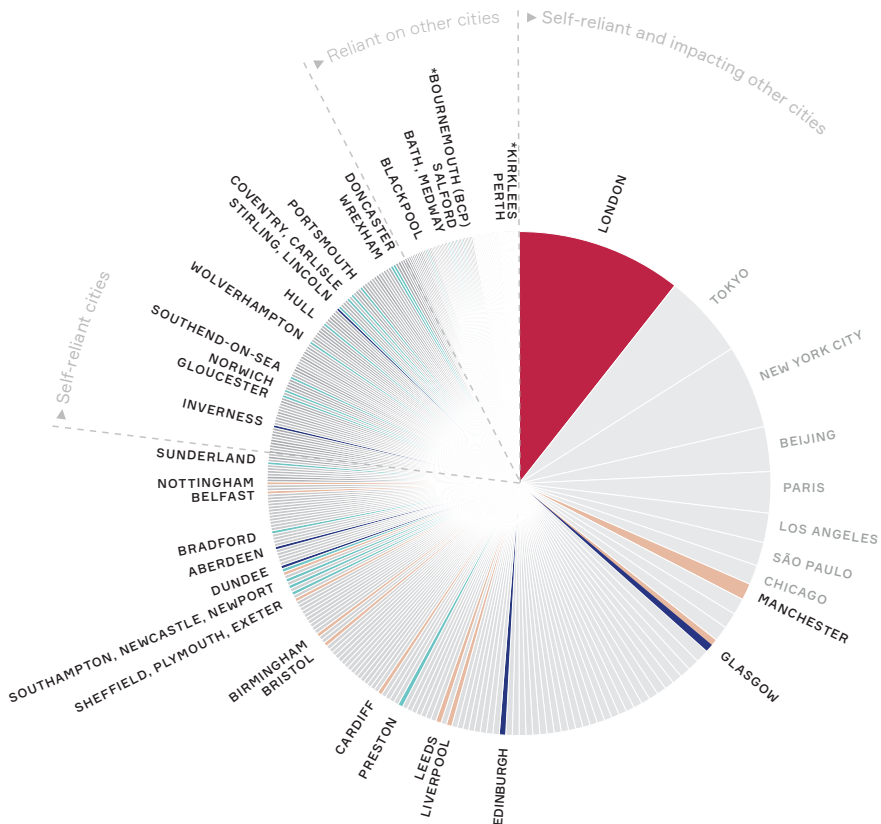
Local authorities: 25
 Population: 6 million
 Strategic reach:
 1 country
 Most in-network reach:
 Newport

LONDON

Local authorities: 33
 Population: 9 million
 Strategic reach:
 70 countries

SCOTTISH CITIES ALLIANCE

Local authorities: 7
 Population: 2 million
 Strategic reach:
 3 countries
 Most in-network reach:
 Glasgow



*Kirklees includes Huddersfield
 Bournemouth includes Christchurch and Poole

ing.

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THIS INGSIGHTS REPORT WAS COMPILED BY
PETER GRIFFITHS
JIYOUNG JO

Contact Us

LEANNE TRITTON
LEANNE.TRITTON@ING-MEDIA.COM

T: +44 (0) 20 7247 8334

ING MEDIA LTD
21 CURTAIN ROAD
LONDON EC2A 3LT, UK

TWITTER: @INGMEDIA
INSTAGRAM: @INGMEDIA_
LINKEDIN: ING MEDIA

ING-MEDIA.COM