

ING GLOBAL CITIES  
DIGITAL VISIBILITY SERIES  
2021

# Europe's most talked about cities

2021

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# Europe's most talked about cities

ING Media's global exploration into digital visibility, now in its third year, provides insight into the impact digital messaging has on investment, where talent concentrates, and our travel choices. As European cities reboot, strategically refreshing content to support each place's unique ambition will be key to thriving in a world eager to reconnect.

ING has identified Europe's Top 60 cities using existing global city rankings and reordered them according to their share of news and social media conversations. 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 our 2020 and 2021 editions highlight how online conversation patterns are always in flux.

Overall the lead enjoyed by the most visible cities has shrunk, largely due to a reduction in user generated content. Pandemic disruption has also created a brief window for less visible cities to more effectively define their own narratives and invest in national and global networks.

London continues to be the most talked about city in Europe, but this position is by no means unchallengeable. The pandemic has created new opportunities for cities to refresh their offer by linking local recovery responses with content that creates regular and compelling entry points across local, national and international audiences.

PETER GRIFFITHS  
CITY STRATEGIST, ING MEDIA

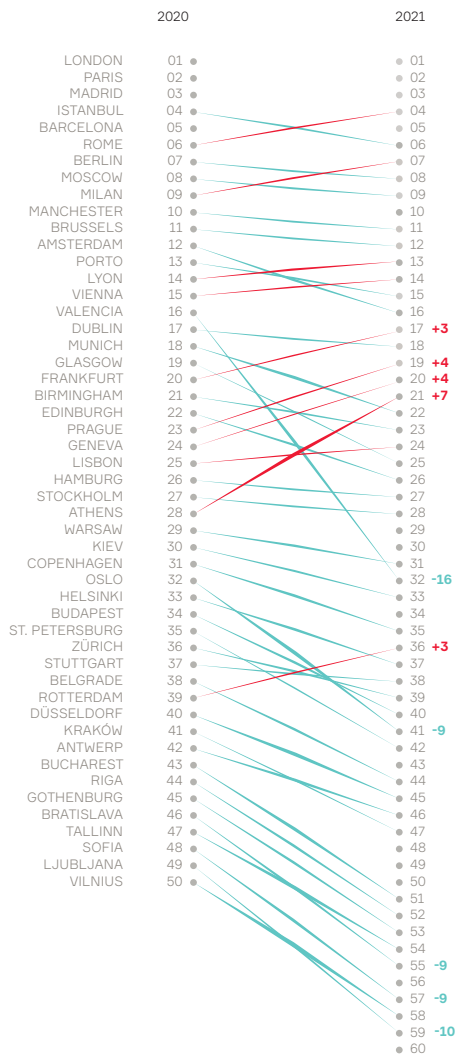
# Digital visibility in a pandemic

## 2020/2021

Last year, ING explored how Europe's Top 50 cities featured on social media and online news. Our 2021 edition expands this to 60 cities to better understand how the pandemic has impacted a broader range of places.

Despite significantly less activity, London (1), Paris (2), Madrid (3) and Barcelona (5) have retained their positions for three years, with Rome unseating Istanbul to return to the 4th spot. However, smaller and secondary cities have generally fared better, with France and The Netherlands adding two new cities, and Italy, Switzerland, Turkey, adding one each. Germany, Europe's largest economy, has 6 cities, more than any other European country.

As with last year, cities making better use of local networks and providing a single entry point to a wider area have greater visibility. Cities tended to fall more than rise, highlighting the need for a consistent and long-term approach to profile building.



# ING's Top 60 European cities by online mentions

SHARE OF TOTAL DIGITAL VISIBILITY (IN PER CENT)

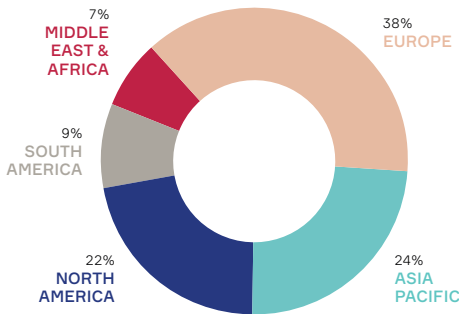
01	LONDON	14.2
02	PARIS	12.5
03	MADRID	10.6
04	ROME	6.8
05	BARCELONA	5.4
06	ISTANBUL	5.1
07	MILAN	4.1
08	BERLIN	4.0
09	MOSCOW	3.2
10	ANKARA	2.4
11	MANCHESTER	2.1
12	BRUSSELS	1.7
13	LYON	1.7
14	VIENNA	1.6
15	PORTO	1.5
16	AMSTERDAM	1.4
17	FRANKFURT	1.1
18	DUBLIN	1.1
19	PRAGUE	1.1
20	GENEVA	1.0
21	ATHENS	1.0
22	MUNICH	0.9
23	BIRMINGHAM	0.9
24	LISBON	0.9
25	GLASGOW	0.9
26	EDINBURGH	0.8
27	HAMBURG	0.8
28	STOCKHOLM	0.8
29	MARSEILLE	0.7
30	LUXEMBOURG CITY	0.7
31	WARSAW	0.7
32	VALENCIA	0.6
33	KIEV	0.5
34	THE HAGUE	0.5
35	COPENHAGEN	0.5
36	ROTTERDAM	0.4
37	HELSINKI	0.4
38	STUTTGART	0.4
39	ZÜRICH	0.4
40	BUDAPEST	0.4
41	OSLO	0.4
42	ST. PETERSBURG	0.4
43	NAPLES	0.4
44	BELGRADE	0.4
45	DÜSSELDORF	0.3
46	ANTWERP	0.2
47	KRAKÓW	0.2
48	NICE	0.2
49	BASEL	0.2
50	ZAGREB	0.2
51	BUCHAREST	0.2
52	RIGA	0.2
53	GOTHENBURG	0.1
54	TALLINN	0.1
55	BRATISLAVA	0.1
56	EINDHOVEN	0.1
57	SOFIA	0.1
58	VILNIUS	0.1
59	LJUBLJANA	0.1
60	REYKJAVIK	0.1

- London and Paris share over a quarter of the online conversation for the Top 60 cities. This is lower than in previous years, with the pandemic reducing London's visibility on social media by 25% and Paris' by 20% during 2020. Madrid has also narrowed the clear lead these cities previously enjoyed.
- London leads for mentions on news, Twitter, Reddit, YouTube, Instagram, blogs, and comments. Paris leads on Facebook and reviews, and Rome on forums.
- Milan achieves the most news mentions (6th overall) for a non-capital city, followed by Frankfurt (7th) and Barcelona (8th). Istanbul and Porto are the only cities that out-perform national capitals.
- Madrid, Marseille, and Istanbul have the highest percentage of mentions for social media relative to news coverage. On the opposite end, Düsseldorf, Bucharest, and Sofia are more likely to make news pages than social media feeds.
- Frankfurt performs relatively well on news (8th overall), Munich for forums (8th), Brussels for comments (6th), Dublin for Instagram (6th), and Kiev for reviews (4th).
- Cities featured from the UK (19%), Spain (17%), France (15%), Italy (11%), Germany (8%), and Turkey (7%) are collectively responsible for over three quarters of all mentions in the Top 60. This is virtually unchanged from 2019.
- English is the key language talking about European cities, followed by Spanish, German, and French. Japanese and Arabic are the most important non-European languages.
- The United States talks about European cities more than any other country.

# Most globally connected European cities

European cities are most able to impact conversations in European cities, followed by Asia Pacific and North America. Despite close proximity to the Middle East and Africa, and strong language connections to South America, Europe's cities are far less relevant to city conversations in these parts of the world. Developing quality content in these regions may be strategic to expanding Europe's already highly diversified reach.

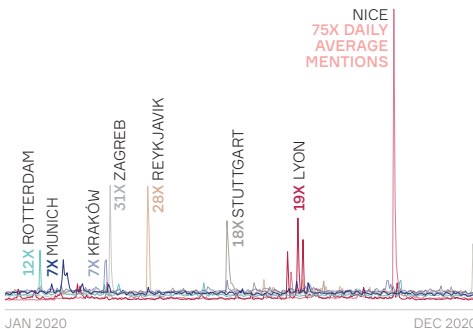
NETWORK REACH OF TOP 5 CITIES IN EACH REGION



- Seven of the world's 20 most connected cities are in Europe. London, which is able to influence conversations in more cities than any other city globally, is followed by Paris (5th), Manchester (9th), Berlin (11th), Glasgow (13th), Munich (15th) and Madrid (19th).
- Cities that have punched above their weight in previous years are well represented in cities with above average network reach, including Glasgow and Manchester.
- Some cities, however, have very little capacity to tell their own story. Luxembourg City, Naples, Nice, Zagreb and Reykjavík all rely significantly on other cities to generate mentions about them. In addition, Prague and Budapest are the only other cities in the Top 60 to have another city as the main source of mentions about them.
- New York City has the greatest impact on conversations about European cities in North America, Tokyo (Asia Pacific), Riyadh (Middle East), São Paulo (South America), and Cairo (Africa). Other notable international cities include Beijing, Los Angeles, Chicago, Rio de Janeiro, Mumbai and Osaka.

# Top trending topics

TRENDING TOPICS SHARE ACROSS EUROPE'S CITIES

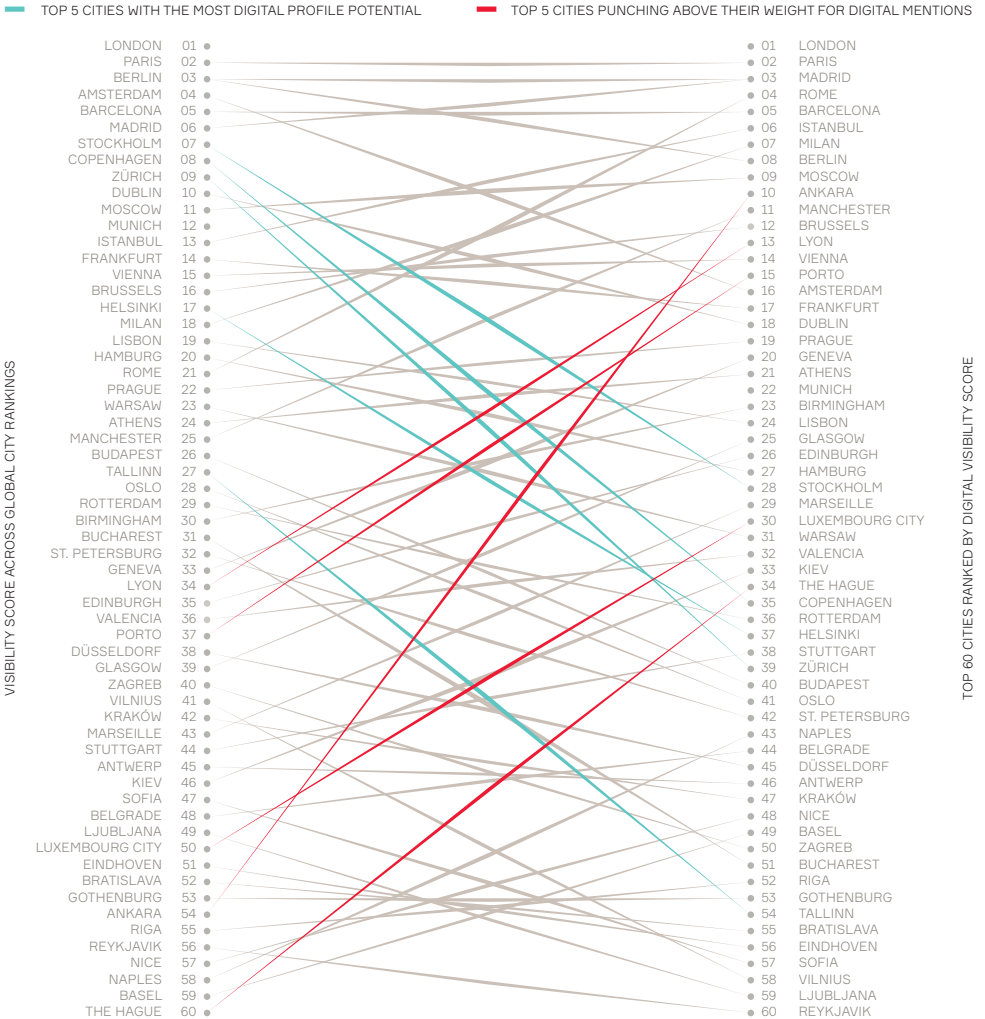


- The pandemic reduced the range and regularity of conversations around European cities, increasing the scale of trending topics and leaving cities with fewer opportunities to share their stories. A heart-shaped flight path over Reykjavík to signal the arrival of Chinese medical supplies shows the possibility of attracting coverage during saturated news cycles.
- Protest, mostly focused on civil and democratic freedoms, was the most significant contributor to trending topics in European cities. The Black Lives Matter movement was the top trending topic in nine cities: Belgrade, Gothenburg, Amsterdam, Athens, Geneva, Antwerp, Berlin, Brussels, and Rome.
- Football matches and protests were of the only mass, live events, giving them a more prominent role in refreshing the range of images available on places than usual. Similarly, tragic events, like the Nice stabbing attack, were responsible for some of the largest trends while culture only trended pre-March 2020 lockdowns.
- Many of the trends around political content related to US involvement in Europe, suggesting cities may need to invest more in US-produced quality content.
- Fake news, while small, is increasingly adding 'noise'. Some cities are including reactive monitoring as part of crisis mitigation planning.

# Comparing visibility between city rankings and online mentions

This chart shows the Top 60 European cities across global city rankings against total digital mentions. While only London, Paris, Barcelona, and Gothenburg have the same ranking for both city ranking and digital visibility, a third are within 10% and two-thirds within 20%. Cities with the widest variance provide the biggest potential

for change. A sustained downward slope tends to correlate with cities slipping down global city rankings, while an upward gradient highlights the cities with the most opportunity to challenge global city rankings. For many cities punching above their weight, this opportunity is a time-bound window to broaden entry points into place.



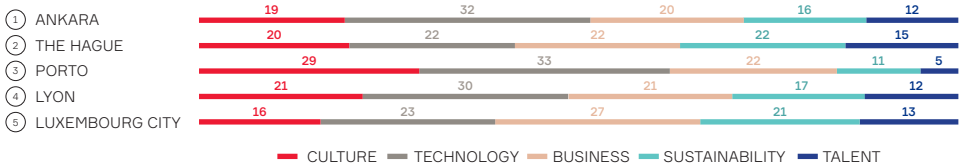
ING Media's investigation into Europe's most talked about cities (2021) covered 706 cities in 53 countries included in a diverse set of 28 publicly available global city rankings. This aggregated list of Top 60 cities appearing on city indices were then ranked by total 2020 digital mentions on Twitter, 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 online relative to their position on city rankings. This presents an opportunity to climb the rankings by consistently improving the quality, range, and impact of conversations taking place about them. Their category shares show significant variance, but also provide clues as to where these cities can connect and further develop conversations to gain profile.

- In previous years, cities punching above their weight tended to perform relatively poorly for traditional news coverage, with huge amounts of user-generated content boosting their visibility. The pandemic has flipped this pattern, with news becoming far more important.
- Manchester, Rome and Valencia, in the Top 5 in the previous year, have been replaced by Ankara, The Hague, and Luxembourg City.

- Ankara replaces Lyon as the city punching the most above its weight. Lyon has seen an ongoing rebalancing away from technology towards sustainability in recent years.
- Porto, which leads the Top 5 for culture and technology, has continued to gain profile. The city illustrates the link between digital visibility and an improving global city ranking.
- The Hague has the highest share for conversations around talent.
- Luxembourg City leads for business, mimicking a pattern found in other financial capitals, including Zürich (see next section) and Frankfurt.



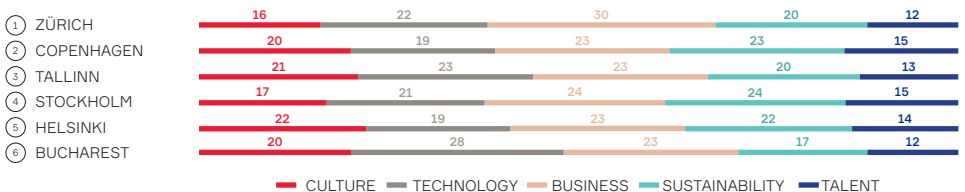
# Top 5 cities with the most digital profile potential

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, which often benefit from capital or de facto capital city status, have the most potential to grow their digital profiles. Over time, those that do not strategically leverage their strengths tend to see a reduction in their visibility score across global city rankings.

- Copenhagen, Stockholm and Helsinki continue to have of the highest conversation shares for sustainability. However, Paris and Glasgow, are capitalising on their involvement as hosts of the COP climate conference. Many

other cities are also increasing their share, reducing the capacity for any particular city to claim overall climate leadership.

- Bucharest, which replaces Warsaw and leads for technology, is the only city that did not appear last year. The Polish capital now has a closer relationship between digital visibility and global city rankings.
- Copenhagen and Stockholm have the highest shares for talent, both cities expected to recover lost GDP of the quickest in Europe.
- Helsinki leads for culture, followed by Tallinn.
- Zürich, perhaps unsurprisingly, continues to have the highest share for business.



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THIS INGSIGHTS REPORT WAS COMPILED BY  
PETER GRIFFITHS

## 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\_  
TIKTOK: @INGMEDIA  
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