

ING GLOBAL CITIES
DIGITAL VISIBILITY SERIES
2022

Europe's most talked about cities

2022

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Europe's most talked about cities



ING Media's research on Europe's most talked about cities, now in its fourth year, provides vital insight into the impact of digital messaging on the region's cities as brands, on how this affects investment, how it influences where talent concentrates, and what impact it has on our travel choices.

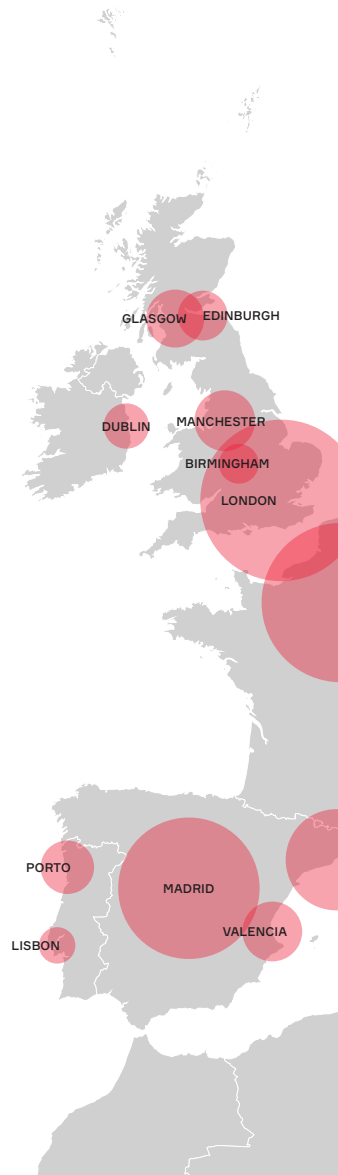
As European cities continue to recover, strategically reviewing and refreshing digital content will be key to bringing out each city's unique narrative, highlighting its economic potential.

ING has identified and ordered the Top 60 European cities according to their share of news and social media conversations. This year, we added TikTok and Twitch data alongside the existing social media data to capture the surge in short-form video and live streaming services. A snapshot of top trending topics and a comparison of performance between our 2019 and current editions capture the changes in online conversation patterns.

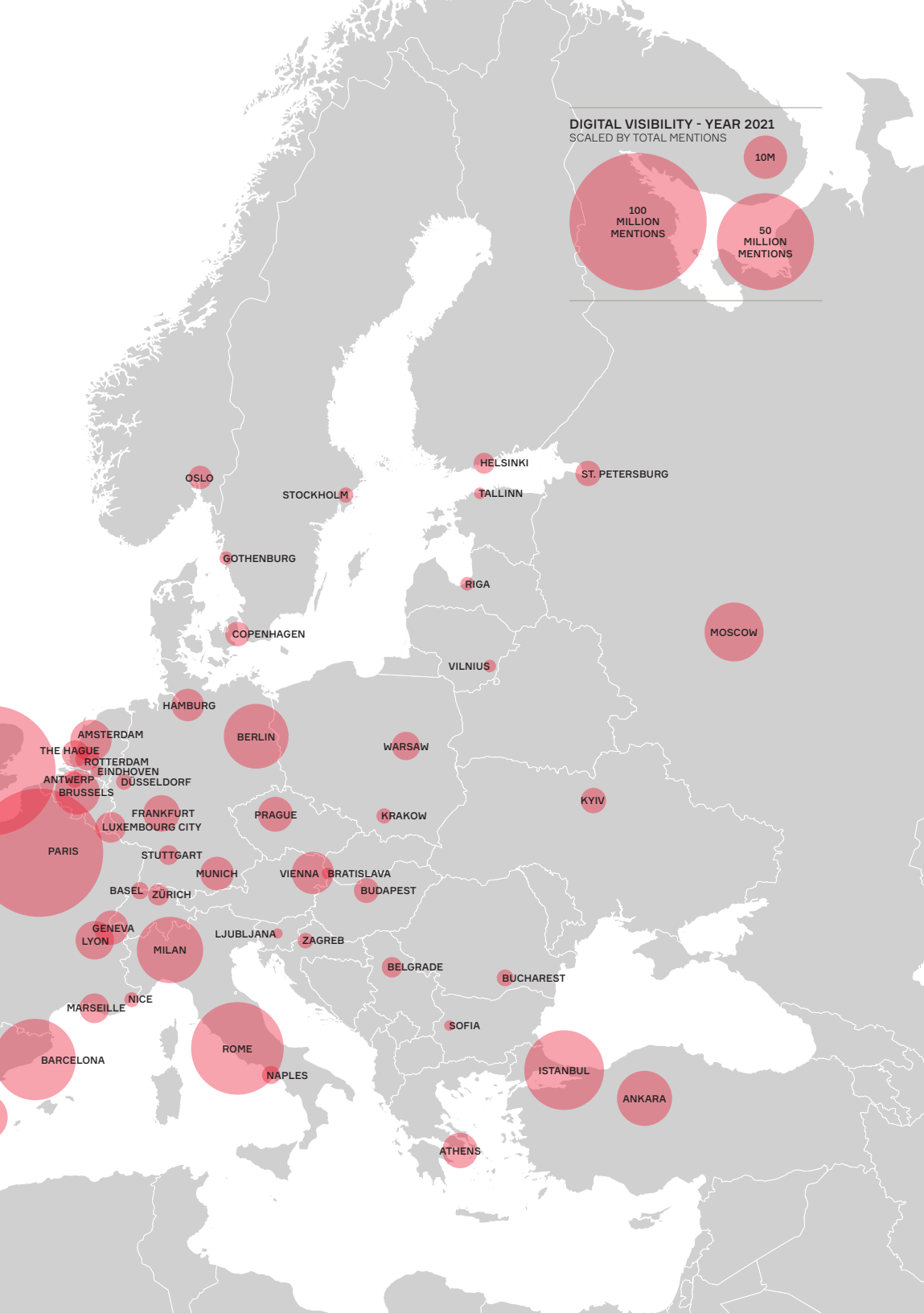
While top rankings for the most visible European cities have remained virtually unchanged, total number of mentions for Top 60 European cities have shrunk mainly due to a continued reduction in user-generated content, resulting in narrowed leads.

The year 2021 provided a window of opportunity for less digitally visible cities to step up, such as Valencia and Glasgow which have benefitted from the international COP26 conference, and a rise in tourism and economic activities respectively. These factors have helped cities generate local content to serve as compelling entry points across national and international – majority European – audiences.

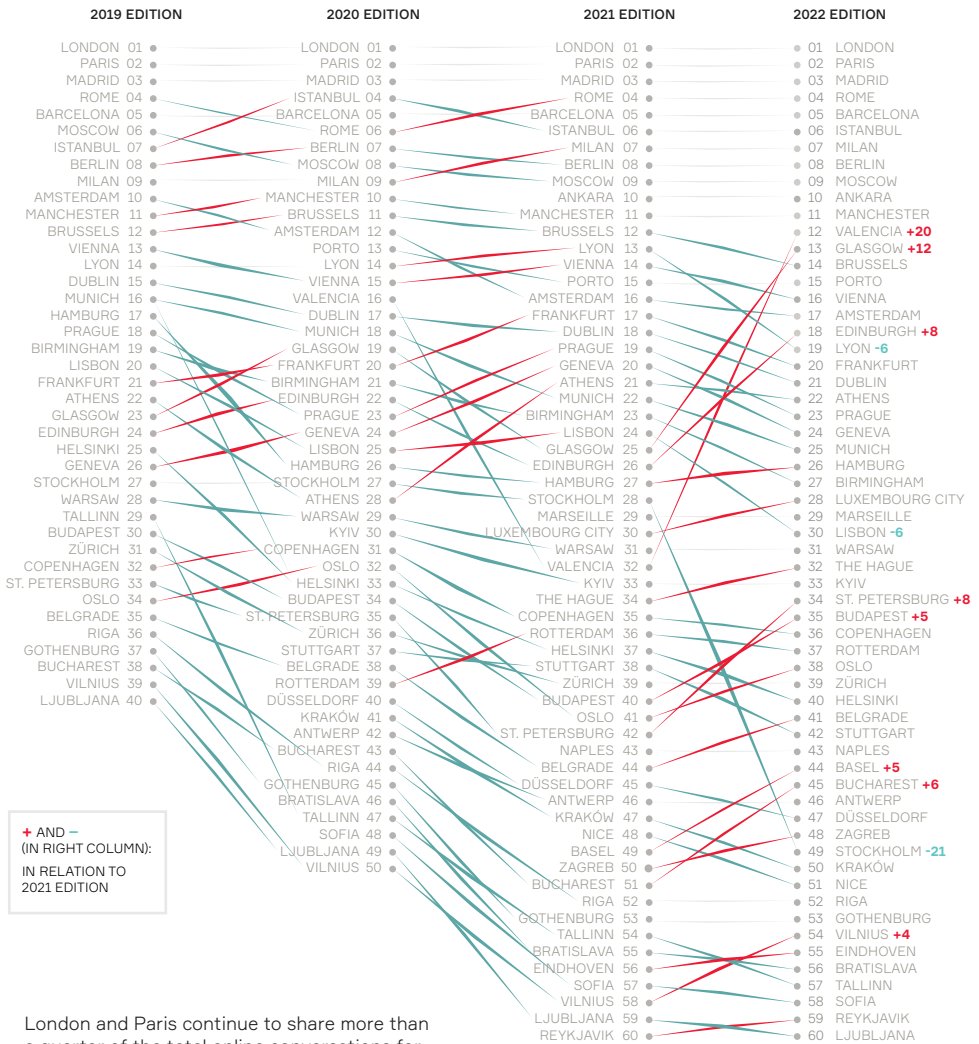
The convening power of cities continues to place them at the heart of the digital conversation, and there is no doubt that cities are key for a sustainable recovery in Europe.



DIGITAL VISIBILITY - YEAR 2021
SCALED BY TOTAL MENTIONS



Europe's Top 60 European cities (Ranked by digital visibility)



London and Paris continue to share more than a quarter of the total online conversations for Top 60 European cities. Total mentions for Top 60 European cities are 18% lower than in previous years, with London's visibility on social media down by 30% and Paris' by 18%.

Mentions by source have spread out to more cities. While London still dominates for mentions in news, Facebook, blogs, Reddit, comments and reviews, Paris leads on Twitter, Instagram and Pinterest. Rome continues to lead on forums in addition to Twitch, while Barcelona tops out on YouTube, and Istanbul leads on TikTok.

Madrid, Marseille and Barcelona have the highest percentage of mentions on social media relative to news coverage. On the opposite end of the scale, Sofia, Bucharest and Ljubljana are more likely to make news pages than social media feeds.

Milan achieves the most news mentions (7th overall) for a non-capital city, the next such cities being Barcelona (10th) and Frankfurt (11th). Istanbul and Porto remain the only cities out-performing their country's national capitals for news mentions.

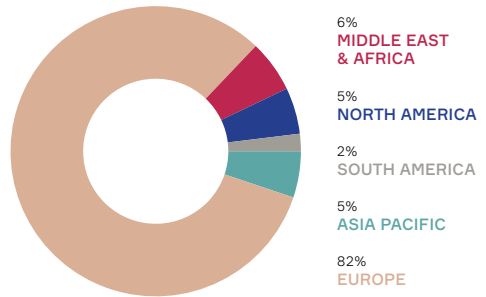
Most connected European cities

European cities remain the most likely to influence and steer digital conversations in other European cities, followed by Middle East & Africa, North America and Asia Pacific, and South America.

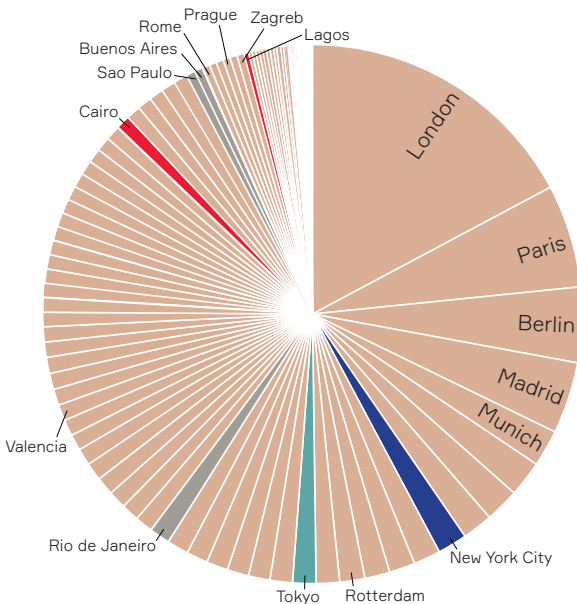
While European cities showed stronger connections to the Asia Pacific and North America in 2020, Europe's geographical proximity to the Middle East and Africa made its cities relatively more relevant to conversations in these parts of the world in 2021.

To expand and diversify European cities' reach to the pre-pandemic levels, developing quality content in non-European regions will play an increasingly important role in increasing their exposure.

ORIGIN OF MENTIONS FOR THE TOP 5 EUROPEAN CITIES BY REGION



ORIGIN OF MENTIONS FOR THE TOP 60 EUROPEAN CITIES BY CITY



London is able to influence conversations in more European cities than any other city globally, followed by Paris, Berlin, Madrid, and Munich.

Cities that rank relatively low in digital visibility, yet are able to influence conversations around other European cities, include Munich and Rotterdam. Conversely, cities like Rome and Valencia which have high digital visibility, are less able to affect conversations around other cities.

Some cities, including Luxembourg City, Zagreb and Prague, still have little capacity to tell their own story; they rely heavily on other cities to generate mentions about them. London's influence is such that its mentions of the cities of Rome, Zagreb and Sofia overtook their own.

New York City has the greatest impact on conversations about European cities in North America, and the same applies to Tokyo (Asia Pacific), Riyadh (Middle East), Rio de Janeiro (South America) and Cairo (Africa). The above list remains unchanged from 2020, with the exception of Rio de Janeiro overtaking Sao Paulo.

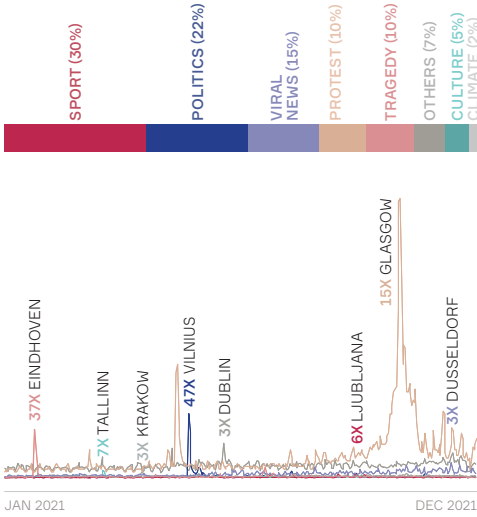
Other notable non-European cities where mentions originate from include Miami, Buenos Aires, Jakarta, Melbourne and Lagos.

Cities featured from the UK (20%), Spain (18%), France (15%), Italy (11%), Turkey (8%) and Germany (7%) are collectively responsible for over three-quarters of all mentions for the Top 60 European cities, which is virtually unchanged from 2019.

English is the key language used in online conversations about the European cities, followed by Spanish, German and French. Japanese, Turkish and Arabic are the most prevalent non-European languages.

Top trending topics

TRENDING TOPICS SHARE ACROSS TOP 60 EUROPEAN CITIES



2021 saw a relative increase of trending topics around sports and viral news – which tend to be hyperlocal and trending on social media.

In sports, football matches were among the most popular mass live events, especially around the delayed UEFA European Football Championships.

Viral, 'off-the-wall' news stories helped to bump up the mentions of less digitally visible cities, including a mystery animal in Krakow turning out to be a croissant, and a chimpanzee sweeping its enclosure in Tallinn Zoo.

Culture and climate, while remaining on the top of many cities' priorities, contributed to only 7% of the trending topics.

The conversations around protests were mostly on local Covid restrictions, which were the case for Ljubljana, Eindhoven, Düsseldorf, Stuttgart, Rotterdam and Vienna.

The scale of trending topics has been reduced, allowing cities greater opportunities to share their stories throughout the year. Topics around protest, tragedy and politics resulted in the highest peaks compared to cities' daily average mentions.

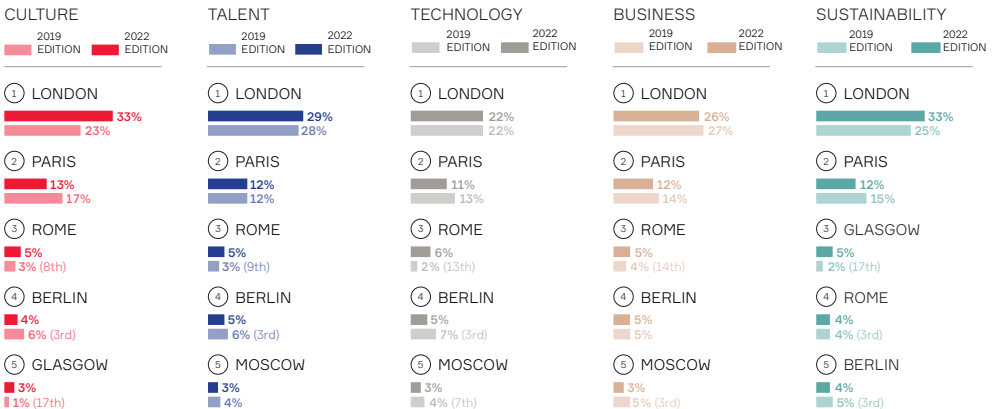
Most trends including politics increasingly related back to the domestic landscape, suggesting cities can confidently consider investing in local quality content.

Top 5 Cities by total mentions of key topics

The charts show cities' conversation profiles across key topics of culture, technology, business, sustainability and talent, which gives an insight into the major conversations around each city throughout the year.

London, Paris, Rome and Berlin rank within the Top 5 Cities across all key topics. London takes up nearly a third of mentions for both culture and sustainability, implying that alignment and cooperation with London would be strategic for cities promoting content on those two topics. Moscow ranks within the Top 5 Cities for technology, business and talent, and Glasgow for culture and sustainability.

Talent tends to be the least talked about topic across all cities, while sustainability is the most talked about.



2019 edition data covers 40 European cities, and 2022 edition data covers 60 European cities, which could result in lessened % in total mentions.

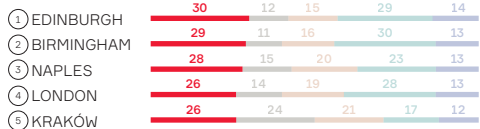
Top 5 Cities by share of key topics

The charts below feature the Top 5 Cities generating the highest share of mentions about each key topic relative to one another, which give insight into trending conversations as well as the collaborative potential with cities that have similar share, or higher total mentions, of the same key topic.

— CULTURE — TECHNOLOGY — BUSINESS — SUSTAINABILITY — TALENT

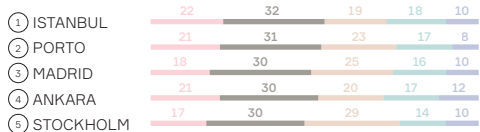
Culture

Crowned top foodie destination in the UK, Edinburgh's mentions around food and beverage culture were understandably on the rise.



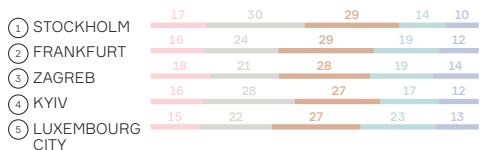
Technology

Istanbul grew as the hub of European technology with high e-commerce penetration, with successful Turkish start-ups such as delivery service Getir gaining traction.



Business

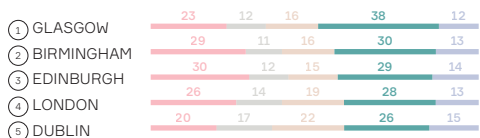
Stockholm leads the way for business and investment conversation, notably around an all-time record for EV adoption rate, the expansion of Spotify and Netflix's Nordic hub announcement.



Sustainability

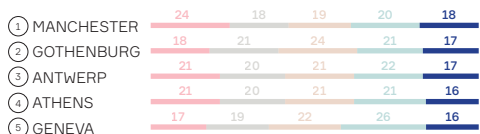
Glasgow recorded the highest share of mentions for sustainability, due to its role as COP26 climate change conference host, as well as various citywide initiatives.

Top 5 Cities with the highest share in sustainability conversations was dominated by the UK cities.



Talent

Manchester's education and training initiatives, many university-led, dominated the conversation, likely in response to the high unemployment rate in early 2021.



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