

The Anholt-GMI City Brands Index

How the world sees the world's cities

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INTRODUCTION

Cities have always been brands, in the truest sense of the word.

Unless one has lived in a particular city or has a good reason to know a lot about it, the chances are that one thinks about it in terms of a handful of qualities or attributes, a promise, some kind of story. That simple brand narrative can have a major impact on one's decision to visit the city, to buy its products or services, to do business there or even to relocate there.

All of people's decisions, whether they are as trivial as buying an everyday product or as important as relocating a company, are partly rational and partly emotional. No human activity is exempt from this rule, and the brand images of cities and countries underpin the emotional part of every decision and strongly affect the rational part too.

Paris is romance, Milan is style, New York is energy, Washington is power, Tokyo is modernity, Lagos is corruption, Barcelona is culture, Rio is fun. These are the brands of cities, and they are inextricably tied to the histories and destinies of all these places.

In today's globalised, networked world every place has to compete with every other place for its share of the world's consumers, tourists, businesses,

investment, capital, respect and attention. Cities, the economic and cultural powerhouses of nations, are increasingly the focus of this international competition for funds, talent and fame.

Yet the international brand of a city is not always accurate or up to date — especially when one is looking at it from the other side of the planet. Some cities do not attract much investment or the right kind of talent because their brand is not as strong or as positive as it deserves to be, while other cities still benefit from a positive brand which today they do little to deserve.

It is crucial for the political and business leaders of cities to understand their brand, and to see how they are viewed by potential visitors, investors, customers and future citizens around the world. And if the image does not match up to the reality, they need to decide what to do in order to close the gap between the two.

HOW CITY BRANDS ARE MEASURED

Readers who are familiar with the Anholt-GMI Nation Brands Index quarterly survey know that nation brands are a complex mixture of global perceptions of a country's people,

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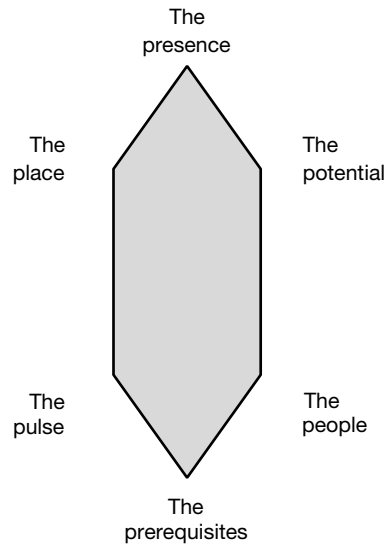


Figure 1: The city brand hexagon

policies, products, culture, business climate and tourist attractions. These six aspects of the nation brand are summed up in the nation brand hexagon, which forms the basic structure of the Nation Brands Index.

Cities are rather different: they are not usually famous for producing particular products or services, the tourism emphasis is often as much on conventions as on leisure visitors, the apparatus of government is usually more technocratic than political, and the city's culture is not always easy to distinguish from the culture of the country as a whole.

It is always hard to generalise about a whole country, since there can be wide discrepancies in climate, culture, people and infrastructure from one region to another, but cities are simpler, smaller and easier to envisage as a single entity. When people consider cities, they often think in quite detailed and practical terms, concentrating on issues like climate, pollution, transport and traffic, the cost of living, leisure and sports facilities, law and order and the cultural life of the city.

For these and many other reasons, the City Brands Index is based on a different hexagon from the one used for the Nation Brands Index (Figure 1). The six components of the city brand hexagon are detailed below.

The presence

This point of the city brand hexagon is all about a city's international status and standing. People are asked how familiar they are with each of the 30 cities in the survey, whether they have actually visited them or not and what the cities are famous for. They are also asked whether each city has made an important contribution to the world in culture, science or in the way cities are governed during the last 30 years.

The place

This section explores people's perceptions about the physical aspects of each city: how pleasant or unpleasant they imagine it is to be outdoors and to travel around the city, how beautiful it is and what the climate is like.

The potential

This point of the city brand hexagon considers the economic and educational opportunities that each city is believed to offer visitors, businesses and immigrants. The panellists are asked how easy they think it would be to find a job in the city, and, if they had a business, how good a place they think it would be to do business in. Finally, they are asked whether each city would be a good place for them or other family members to get a higher educational qualification.

The pulse

The appeal of a vibrant urban lifestyle is an important part of each city's brand image. This section explores how exciting people think the cities are, and how easy they think it would be to find interesting things to do, both as a short-term visitor and as a long-term resident.

The people

The people make the city, and in this point of the hexagon respondents are asked if they think the inhabitants would be warm and friendly, or cold and prejudiced against outsiders. They are asked whether they think it would be easy for them to find and fit into a community which shares their language and culture. Finally, and very importantly, panellists are asked how safe they think they would feel in the city.

The prerequisites

This section asks people about how they perceive the basic qualities of the city: what they think it would be like to live there, how easy they think it would be to find satisfactory, affordable accommodation and what they believe the general standard of public amenities

is like — schools, hospitals, public transport, sports facilities and so on.

THE 30 CITIES

Choosing 30 cities for the initial City Brands Index was quite a challenge, and the aim was to create an interesting mix of the most powerful city brands (like New York, Paris and Tokyo) with some promising emerging players (like Prague, Mumbai and Johannesburg). A few other cities which are particularly interesting because they have mixed or poor reputations, or a brand image which lags behind the economic, cultural and social progress which the city is making, were also added.

About half of the cities on the list are capitals, and half are second cities, biggest cities and principal commercial cities. In some cases more than one city from the same country was included if each had a very different but equally prominent global reputation (such as New York, Los Angeles, San Francisco and Washington, DC; Milan and Rome; or Beijing and Hong Kong).

It is planned to continue extending the list of cities in subsequent surveys, as there are many other cities which are conspicuous by their absence.

The survey was conducted online among 17,502 men and women aged 18–64 from a wide range of income groups in the following countries: Australia, Brazil, Canada, China, Denmark, France, Germany, India, Italy, Japan, Malaysia, Mexico, the Netherlands, Poland, Russia, Spain, the UK and the USA.

London: To know it is to love it?

London is the top-ranking city in the first City Brands Index, and its very positive brand image is in line with the

overall image of the UK as reported in the Nation Brands Index.

Surprisingly, considering the prominence of the City of London as a global financial centre, almost none of the respondents made a spontaneous association between London and finance or banking, but fully 14 per cent mention Queen Elizabeth and 9 per cent Prime Minister Tony Blair (who might be encouraged to learn that less than 2 per cent mention his equally high-profile predecessor, Margaret Thatcher).

Although Londoners are often heard to complain about the reality of living in Europe's richest and most populous city, London's appeal seems to survive quite close familiarity; it is also rated by a wide margin as the city the panellists feel they know most about among the 30 in the City Brands Index. It is the city most visited by respondents, too, a fraction ahead of Paris: 30 per cent of them have been there on holiday and 10 per cent on business (in the case of Paris, the ratio of leisure to business visits is slightly higher).

As a general pattern, the highest-ranking cities in the City Brands Index are also the ones respondents know best, but there are some interesting exceptions: more than a third of this global sample claim to know 'very much', 'much' or 'a fair amount' about New York, Los Angeles, Berlin, Washington and Tokyo, but far fewer people rate them highly as brands; Tokyo is the 12th best known city in the index but ranks 19th overall. In these cases, familiarity clearly does not lead to respect. (A handful of cities work the other way round: they are perceived very positively despite the fact that the panellists admit to knowing relatively little about them. Sydney and Barcelona, for example, are both better admired than they are known.)

London is ranked top of the list for

ease of finding a job; for doing business in; for obtaining a valuable educational qualification; for ease in finding a community of people where one can fit in; in second place after Geneva for the general standard of its public amenities such as schools, hospitals and public transport; and in second place after Paris for overall lifestyle, and for its wide range of interesting things to do both for short-term visitors and long-term residents. The difficulty of finding affordable accommodation, the climate and the friendliness of the people are the only categories where London scores poorly.

So positive, in fact, are perceptions of London that people imagine it as cleaner than it really is: it comes 13th in the City Brands Index for the perceived quality of its environment but was ranked 102nd out of 215 cities for actual cleanliness in a global survey of cities carried out by Mercer, a consulting firm, in 2005.

People also appear to underestimate the cost of living in London. According to a recent survey conducted by UBS (2005), London ranked as the world's second most expensive city, but it is effectively ranked seventh in the City Brands Index.

It is arguably a symptom of a strong brand that people attribute greater qualities to it than it actually possesses.

Amsterdam: Clichés, outrages and the city brand

The nation brand of the Netherlands is generally a rather dull performer, and tends to hover around the lower end of the rich Western democracies in the Nation Brands Index, but the city of Amsterdam is an altogether different proposition. Its profile is noticeably higher than that of the Netherlands, especially among European and North

American respondents, and it has a character which people in other countries seem to find much more distinctive and easier to define.

This character is not altogether positive, it has to be said: in some countries where this research was conducted 7 per cent of respondents spontaneously associate Amsterdam with prostitution and 30 per cent with drugs, but it is hard to say whether these associations affect their overall liking of the city one way or the other. Most of the other immediate associations are visual clichés of the simplest kind (tulips, windmills, cheese and clogs) and are ‘transferred’ from the general stock of Dutch national imagery rather than being truly specific to Amsterdam. Amsterdam’s association with tulips is remarkably strong (fully a third of Japanese respondents make this association, for example). A flower may be less potent as a proxy for the character of a city than its vices, but at least, in the case of the Dutch tulip, it is a very much stronger association.

Amsterdam is perceived as being very economical (it ranks fourth in the City Brands Index for ease of finding affordable accommodation) but in reality it is rather expensive (the 13th most expensive city in the world, according to the UBS (2005) survey).

After the Nation Brands Index was published many Dutch people expressed surprise at the relative health of their national brand, and asked whether the world knew nothing of the assassinations of the film-maker Theo van Gogh and the politician Pim Fortuyn. (Interestingly, there was a similar reaction in Sweden, where people were just as surprised that the murders of Prime Minister Olof Palme and more recently Foreign Minister Anna Lindh had not utterly destroyed the brand image of Sweden.)

The fact is that the brands of the

Netherlands and Amsterdam, Sweden and Stockholm, like most mature and successful place brands, have achieved a kind of critical mass, to the extent that people simply reject anything negative which threatens to contradict the overwhelmingly positive ‘brand story’ that they carry in their minds. It is too much trouble for most people to revise the things they have always believed about cities and countries just because something shocking or out of the ordinary has happened there.

Problems in places with powerful and positive reputations — even grave problems like politically or racially motivated murders in broad daylight — seem to be received by the world as ‘the exception that proves the rule’. The reaction tends to be ‘A murder in broad daylight: how shocking — and Holland/Amsterdam/Sweden/Stockholm is such a *safe* place!’. Obviously this will not last forever, and if bad news from Holland or Sweden starts to become a regular event it will eventually spoil the brand image. But for the time being, the positive reputation effectively outweighs the negative events, and Stockholm and Amsterdam are still rated, respectively, second and seventh safest of the 30 cities in the index.

This points to a key observation: a brand is not a message, but the *context in which messages are received*. If the context is positive, even negative messages will often be interpreted in a favourable light. This is one of the reasons why a powerful and positive city or nation brand is such a valuable asset: it makes the reputation of the place exceptionally resilient to negative influences, and is a kind of insurance policy.

For the time being, the murder of Theo van Gogh is associated with Amsterdam by only 1.1 per cent of this global panel (unprompted awareness is highest in Denmark and Italy, and close

to zero in most other countries, including Holland itself).

New York, Washington, Los Angeles and San Francisco: The impact of terror

Like Amsterdam and the Netherlands, New York and Los Angeles seem to have better brands than the USA itself. This might be because the cities are so well known and powerful, and have such unique and distinctive characters, that their cultural identity is not seen as merely subsidiary to the cultural identity of the USA; they are almost 'nation brands' in their own right. The other reason is undoubtedly because the current low esteem for Brand America is connected with international views of the present administration, and there is a 'firewall' in people's perceptions between the nation and the cities; there is the same distinction, up to a point, between the government and the people — although, as the author has argued in a recent book (Anholt and Hildreth, 2005), this point may now have been reached.

This is true of San Francisco and Los Angeles because people know that they are a long way from Washington, DC, and because their cultural and political image is more liberal (one event which the global panel most strongly associates with San Francisco is the Gay Pride marches). Los Angeles is primarily associated in people's minds with Hollywood — and the cultural brand of America, as the Nation Brands Index shows, is in much better health than the political brand.

Looking at the results of the City Brands Index, it is striking how well branded the US cities are compared to most other major cities and many capitals, around the world. Their look and their lifestyle have been so well established through American cinema,

print, television and even products (for example, in the way Seattle has been branded by Microsoft, Boeing and Starbucks) that they are simply more famous than other cities, whether or not people have visited them. The Golden Gate Bridge is one of only two landmarks in the study which is spontaneously associated with its city by more than three-quarters of the global panellists, and other icons like the White House and the Statue of Liberty are named by well over half.

As has been seen, high levels of familiarity do not necessarily translate into brand appeal, but the sense of status and importance of some US cities is so pervasive that it distorts people's sense of value: Washington, for example, actually offers good value for accommodation, and ranks a very low 78th place in the UBS (2005) survey; yet it was ranked in the City Brands Index as the fifth most expensive city in the list.

Of course, New York and Washington received an unusual amount of media coverage — even by the standards of American cities — when they became targets of international terrorism in 2001. It was mentioned earlier that although events such as assassinations are shocking to people within the city and the country where they take place, they seldom create high long-term awareness in other countries — unless they pass into history like the assassinations of Julius Caesar, Abraham Lincoln, John F. Kennedy or the Archduke Franz Ferdinand.

Terrorist attacks, which do temporarily create very high awareness because they are more widely and more intensely reported in the global media, appear to have relatively little impact on the brand image of the city as a whole, even in the short term. The recent attacks in Cairo, Madrid, London and of course New York and Washington may be

Table 1: The top ten events most strongly associated with particular cities

City	Event	Average spontaneous association (%)
Berlin	Breaking down the Berlin Wall	57.75
New York	11 September 2001 terrorist attack	56.97
Rome	Election of new pope	45.43
London	7 July 2005 terrorist attack	34.30
Madrid	Bomb blast	29.74
Cairo	Terrorist attacks	27.11
Johannesburg	End of apartheid	25.94
Rome	Death of pope	21.62
San Francisco	Earthquake	21.40
Washington	11 September 2001 terrorist attack	17.46

spontaneously associated with those cities by as many as 60 per cent of respondents worldwide, but London, New York and Madrid are still ranked among the top ten city brands overall; London and Madrid are even rated 11th and 12th safest cities by this panel, well above certain cities where no serious attacks have occurred or are expected (such as Milan, Prague and Hong Kong).

It seems that people are better able to weigh up probabilities than psychologists sometimes give them credit for: the cities which are ranked lowest for safety in the City Brands Index tend to be the ones where everyday crime and lawlessness are highest, not the ones where an outrage has recently been perpetrated. New York languishes at 23rd place for safety and Washington at 19th, but this is more probably because both cities have a reputation for high levels of street crime than because of 9/11.

As mentioned in an earlier report on the Nation Brands Index (Anholt, 2005), people do not fundamentally change their minds about places because of something that happens in that place or to that place: the brand usually only changes for them if they are *personally affected by the place* in some way, or else if the place changes its behaviour in a consistent way and over quite a long period. Events like 9/11 and the San Francisco earthquake (which 99 years

later is still associated with the city by over a fifth of the global panellists) appear to break the mould, and in some small way reach into distant countries and actually change people’s lives (Table 1).

New York and Los Angeles do well in the City Brands Index, ranked at seventh and eighth overall, mainly because they are seen as important, high-profile cities which offer many opportunities (they rank second and fourth overall in the ‘potential’ point of the city brand hexagon). The respondents do not generally rate them as safe, clean, beautiful, affordable or friendly cities, but the business and educational opportunities are seen as very high and both are recognised as multicultural cities where foreigners can find a niche, even though they are not expecting a warm welcome. New York, in particular, is seen as a place with a good lifestyle where there is always plenty to do, although there is an interesting contrast between the very strong association between Rudolph Giuliani and New York (as high as 16 per cent in Italy, where he is something of an adopted hero because of his Italian ancestry) and the city’s rather low rankings for safety: perhaps the man is more celebrated than his achievements.

San Francisco is perceived to offer a

warmer welcome, a better climate and lower prices, and carries more positive associations; although its status as a brand is lower and its overall appeal somewhat weaker, it still ranks very creditably at 11th place overall.

Paris: The value of an icon

Paris comes second overall in the City Brands Index, and is another very striking example of a city which outperforms its own country in brand power. France was ranked in overall ninth position in the second quarter of the Nation Brands Index, and in the third-quarter study its esteem around the world is shown to be very patchy; Paris, on the other hand, has a near legendary and universal appeal. It is ranked top for lifestyle, and near the top of the index on most other categories. Its only poor scores are for affordable, easy-to-find accommodation (28th out of 30), employment opportunities (14th) and the friendliness of the people, where it ranks 25th. Like New York, Paris has an unfortunate reputation for hostile natives, a commonplace which is faithfully reflected in the City Brands Index, and which drags down its otherwise excellent ratings.

People strongly associate Paris with fashion and perfume (and all of the famous couture brands are named by at least some of the respondents), although not, surprisingly, with good food: no more than 2 per cent of panellists spontaneously link Paris with 'food' or 'restaurants'. There appears to be very little international agreement about the contribution of any city to cuisine, in fact: Mexico City and Paris are held to have made a contribution to food by around 1 per cent of this worldwide sample, and no other city comes close.

Paris has one brand asset, however, which is uniquely valuable: the Eiffel

Tower. This originally temporary structure is one of the few truly global megabrands in the City Brands Index, a landmark of iconic status which is spontaneously associated with Paris by nearly 80 per cent of all respondents worldwide (Table 2). The presence of such a prominent and distinctive visual symbol is certainly one reason why Paris does so well in the rankings.

Rome and Milan: *Stile italiano* finally beats *chic français*

The two Italian cities, Rome and Milan, both produce positive results in the City Brands Index which match up well with Italy's scores in the Nation Brands Index. As with Italy, most of the values associated with these cities are on the 'soft' side, relating to fashion, climate, culture, design, shopping and lifestyle rather than infrastructure, politics or high finance. Rome is ranked second in the world for beauty, after Paris, and there is very high awareness (and knowledge) of its antiquities and other tourist attractions, as well as its contemporary lifestyle.

The perception that things are not well organised in Italy is reflected in the low rankings given to both cities in the 'prerequisites' section: Rome ranks 18th and Milan 19th for public amenities, and while there is obviously some basis in fact for these perceptions, they do lag behind the reality of the cities, especially Milan. Both cities are also believed to be rather polluted, ranking 16th and 17th for air quality and cleanliness; neither is perceived to be a good place to do business, but the people are believed to be warm and friendly (markedly more so in Rome than in Milan, a view which many non-Milanese Italians would share).

What is particularly noticeable in the

Table 2: Famous city landmarks

Rank	City	Attraction	Awareness (%)
1	Paris	Eiffel Tower	78.96
2	San Francisco	Golden Gate Bridge	74.47
3	Washington	White House	66.47
4	Sydney	Opera House	62.95
5	Cairo	Pyramids	61.46
6	New York	Statue of Liberty	54.23
7	Edinburgh	Edinburgh Castle	53.30
8	Berlin*	Berlin Wall	51.83
9	Moscow*	Red Square	51.73
10	Rio de Janeiro	Cristo Redentor	50.59
11	London	Big Ben	46.08
12	Rome*	Colosseum	44.49
13	Toronto	CN Tower	35.53
14	Moscow*	Kremlin	35.02
15	Los Angeles	Hollywood	31.69
16	Beijing	Tiananmen Square	30.97
17	Geneva	Lake Geneva	30.39
18	Berlin*	Brandenburg Gate	24.40
19	Milan	La Scala	23.87
20	Brussels	Manneken Pis	23.84
21	Rome*	The Vatican	23.21
22	Prague	Charles Bridge	23.20
23	Mumbai	Gate of India	21.94
24	Barcelona	Sagrada Familia	21.93

*Denotes a city with more than one high-ranking monument.

detailed data from the City Brands Index is the tremendous power of Brand Milan in the area of fashion, design, shopping and ‘designer lifestyle’ in general, and here it clearly outranks Paris in a way that, 30 or 40 years ago, would have seemed inconceivable. As Table 3 shows, Milan’s contribution of fashion to the world is considered by an enormous margin to be the greatest contribution of any city in any field.

Rome, on the other hand, draws the majority of its brand power not from its cultural, architectural or archaeological wealth but from the presence of the Vatican City (which, needless to say, is not seen by respondents as a separate city, let alone a separate sovereign state). The importance of the pope to the brand image of Rome is huge — and although the rankings from the predominantly Catholic countries in this survey are somewhat higher, the positive perceptions appear to be as much secular and touristic as they are religious.

Berlin: The slow escape from history

Berlin performs reasonably well in the City Brands Index, beating San Francisco into tenth place overall. The general perception is that this is a safe, modern city with good infrastructure, a rather poor climate and unfriendly people but an otherwise pleasant environment, offering affordable accommodation, not a great deal to do, a moderately good business environment and above-average educational potential; a city that has made a significant contribution to the world during the last 30 years, mainly as a result of reunification.

As has been seen, Berlin also has the rare distinction of being strongly associated with two world-famous monuments: the Brandenburg Gate (which registers with a higher percentage of respondents than the Vatican or La Scala) and the Berlin Wall (which is more strongly associated with its city than Red Square, Big Ben, Hollywood, Lake Geneva or the Colosseum).

Table 3: Cities' contributions to the world

Rank	City	Contribution to world (last 30 years)	Average %
1	Milan	Fashion	52.78
2	Washington	Politics	39.82
3	Paris	Fashion	32.24
4	Brussels	EU	30.86
5	Moscow	Politics	29.48
6	Madrid	Culture	25.44
7	Tokyo	Technology	23.44
8	Prague	Culture	23.35
9	Rio de Janeiro	Culture	22.00
10	Rome	Culture	18.51
11	Paris	Culture	17.87
12	Los Angeles	Film/movies	17.59
13	Rome	Religion	17.48
14	Cairo	Culture	17.24
15	Barcelona	Culture	17.00
16	Berlin	Fall of the Berlin Wall	16.11
17	Edinburgh	Culture	16.02
18	San Francisco	Culture	15.51
19	Barcelona	Olympic Games	15.33
20	Mexico City	Culture	15.26
21	Singapore	Economy	15.17
22	Sydney	Culture	14.48
23	Brussels	Politics	14.37
24	Johannesburg	Apartheid	13.87
25	Tokyo	Economy	13.14
26	Los Angeles	Culture	13.07
27	Berlin	Unification of East and West Germany	12.62
28	Mumbai	Cinema	12.59
29	Stockholm	Science	12.52
30	Rio	Carnival	11.96

Berlin has only one other significant score in the City Brands Index: a remarkably strong and globally consistent association with Adolf Hitler. The association of Hitler with Berlin is stronger than that of London with Tony Blair or even Johannesburg with Nelson Mandela; in Mexico, Spain and China, Hitler was spontaneously mentioned by between a quarter and a third of all respondents. Sixty years after his death, Hitler is still one of the few associations with the city that people around the world all seem to share. One wonders what the half-life of such a memory can be: if it has taken 60 years for the association to decline from what must have been close to 100 per cent in 1945 to its current level of 13 per cent, perhaps there is reason for Berlin to hope that in another generation the association will be one of the city's

weaker ones, instead of its third strongest.

Whatever the prognosis, the remedy for Berlin must be the same for any city or country whose brand image is tainted by associations with a past it is anxious to leave behind, whether it is Beijing's near 15 per cent association with Tiananmen Square (in the 'significant events' section, not as a tourist attraction), or Moscow's 18 per cent association with 'alcohol': to earn and deserve an even stronger reputation for something more wholesome.

Sydney: The branding phenomenon of the Olympic Games

The massive global awareness of the Olympic Games and their very close association with their host cities are a significant factor in the City Brands Index.

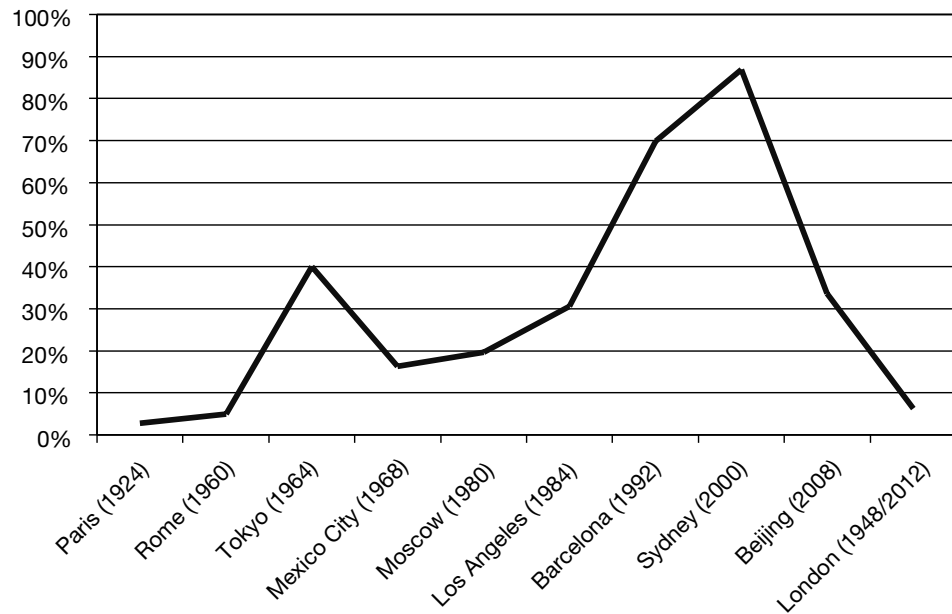


Figure 2: Association of host city with the Olympic Games

Nowhere is this more evident than in the case of the 2000 Sydney Olympics, an event which produces an average international awareness of 87 per cent, dwarfing all other associations of any sort with any other city. In most of the country panels the spontaneous association of Sydney with the Olympic Games is virtually 100 per cent. It is probably no exaggeration to say that the modern brand of Sydney was built on the Opera House and the Olympic Games, and in consequence much of the very high equity of Brand Australia (the number one nation brand in the second quarter of the Nation Brands Index).

The other remarkable factor about the brand salience given by the Olympics is how slowly it decays. A not insignificant number of panellists still spontaneously make associations between Paris and the Olympic Games, even though the last Games held there were in 1924. Even *future* host cities like Beijing and London gain brand awareness purely through popular anticipation of the Olympics. As

Figure 2 shows, there is a gradual decline in popular association between the Olympic Games and host cities over a period of about 80–100 years, but, as the still very high awareness of the 1964 Tokyo Olympics shows, the decline is by no means inevitable.

Next to the Olympics, other sporting events pale into insignificance: the football World Cup (which is surely one of the biggest events after the Olympics) barely registers in the City Brands Index — the highest score is an average of 18 per cent for the 1998 World Cup in Paris. Obviously this low score is partly because the World Cup is hosted by a country rather than by a city, so the branding effect is more diffuse — yet none of the American host cities of the previous World Cup in 1994 is still associated with the event by more than 1 per cent of panellists.

The only other sporting events mentioned by substantial numbers of panellists are the Tour de France, also associated with Paris, and the New York

Table 4: Awareness of events

City	Event	Awareness (%)
Rio de Janeiro	Carnival	71.17
Milan	Fashion shows	48.58
Edinburgh	Fringe Festival	27.94
Los Angeles	Academy Awards	27.72
Stockholm	Nobel Awards	27.63
Madrid	Bull run/bull fighting	20.24
San Francisco	Gay Day	19.71
Paris	Fashion shows	18.36

Marathon, which comes fairly close behind with an average association level of around 14 per cent.

Some non-sporting events and especially high-profile cultural events can create high levels of awareness, but none appears to match the Olympics' grip on the public imagination (Table 4).

Neither Sydney nor Australia, although they are indisputably popular and powerful global brands, appears to have the same range, depth and richness of associations which panellists ascribe to the more mature place brands like Italy, London, New York or Paris. These cities and countries have built up their positive global brand equity through countless different channels over several centuries, and arguably have deeper roots. Nation and city brands like Sydney and Australia can indeed be built on a small number of high-profile and impeccably implemented projects — but the interesting question is how robust they are, and how resilient to negative publicity should their luck or their good management turn.

No matter how quick Sydney's rise to prominence has been, its scores are consistently high throughout the index. Since relatively few respondents have visited the city (it comes 18th in the list of cities actually visited by panellists), one must assume that many of the high rankings which Sydney receives for issues like infrastructure, services, community and so forth are simply extrapolations or

conjectures deriving from a generally positive feeling about the place. Like Australia in the Nation Brands Index, the general level of goodwill towards the place is so high that people seem prepared to give Sydney the benefit of the doubt on a great many issues.

Lagos

Lagos is the biggest and richest city of Africa's biggest and most populous country, and although no longer the capital of Nigeria is still by any measure the country's first city. It would therefore seem to be a good candidate for finding out whether any sub-Saharan city apart from Johannesburg has any brand values that register with the global panel, a representative cross-section of ordinary people from a range of both rich and developing countries.

The significance of brand value for places like Lagos and Nigeria is not trivial. If their reputation is entirely composed of negative elements — such as crime, war, poverty, disease or corruption — then it is highly unlikely that the city or the country will be able to attract many tourists, foreign investors, trading partners or even consumers for locally produced products.

Lagos ranks at or near the bottom of most of the categories in the City Brands Index, but this is hardly surprising since it is the least well known and least visited of the 30 cities in the index, and

has no world-famous landmarks, personalities, events or achievements. This creates a kind of perceptual vacuum into which a wide range of generalised African imagery tends to flow. By far the leading association with Lagos is 'war', mentioned by 11 per cent of respondents, an unusually high percentage by any standards — the same percentage, in fact, that mentioned the association of the United Nations with Geneva. But the Biafran war ended in 1970.

Lagos, like Nigeria itself, and like most cities and most countries in Africa, suffers from 'continent branding effect': none of these places has been able to create a separate, unique international reputation, and so they are obliged to share a generic continent brand called Africa. And Brand Africa, with its simple message of ongoing catastrophe, is promoted with skill, dedication, creativity and vast financial and media resources by aid agencies, international organisations, donor governments and, most prominently, by aid celebrities like Bob Geldof and Bono. Every time such a celebrity appears before tens of millions of TV viewers around the world to make another impassioned plea on behalf of the continent (usually represented by a black logo in the shape of Africa), he is building the brand of Africa — not as 53 countries in various stages of development and struggle for independent existence and identity, but as a uniform, hopeless basket-case. And with each additional promotion of this brand, it becomes harder for thousands of places like Lagos, their companies and entrepreneurs, to break free of these negative associations and start to build a brand of their own.

It is no accident that all the successful city brands and nation brands are also rich. Having a powerful and positive international reputation is the cost of

entry into the global marketplace, and without this it is difficult to see how places like Lagos can begin to build their own economies and break their dependence on foreign aid.

CONCLUSIONS

Cities have brand images which rise and fall very slowly, and this is a double-edged sword. On the one hand it means that cities in developing countries find that their new prosperity and opportunities can take an age to pass into widespread international awareness — but on the other hand it does mean that cities with positive brands are surprisingly immune even to catastrophic events. And once or twice in a generation a city like Sydney or Dubai (not featured in this edition of the Index) manages to prove that a meteoric rise to celebrity and popularity can occasionally occur.

These brand images, just like the brand images of products, of companies and of countries, influence and underpin countless decisions — some of them with very important consequences — made every day by millions of people around the world.

Some cities have brands which are so powerful they even eclipse the reputation of their country, and this can create problems while it lasts: the wealth created by investment, trade and tourism in a famous city does not always trickle down very efficiently to needier but less well-branded cities and regions (as the Czech Republic is finding to its cost).

The better people understand how the reputations of places work, the sooner they will learn what is involved in earning and deserving a powerful brand image, and how their own behaviour or that of the competition threatens that most valuable of assets.

But it is important to appreciate one very important difference between

product brands and place brands. People are, to some extent, willing to change their minds about product brands as a result of good advertising and good marketing. That is a pact which consumers generally accept about products: they are prepared to pay a little attention to commercial messages, and receive some of their information about products through paid-for media. No such pact exists about cities or countries.

When the brand image of a heavily promoted city does change for the better, a closer look reveals that the advertising and marketing did not achieve the change: what they did was to reflect a real change that was taking place in the conditions, the people, the policies and the opportunities of the city, and help the world to realise and understand those changes a little faster

and a little more fully than perhaps they would have done otherwise.

And that is a useful task to have performed, even if the costs of achieving it effectively and sustainably are too high for many cities to justify. What advertising and marketing cannot ever do is to make a bad city look good: that is propaganda, not brand management, and it is as wasteful as it is ineffectual.

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