



ENGAGING CITIES

*The Growing Relevance of Soft Power
to City Reputations in Asia Pacific*



THE BIG SHIFT



Much has been said and written about the resurgent political and economic influence of countries in Asia Pacific. There has been less debate about the impact of a nation's vision, values and culture in establishing a greater and more relevant presence in the region. We believe that is changing.

So-called hard power has become a fundamental reality in the region, as it has anywhere in the world. The size, population, wealth, trade muscle and military strength of a country remain as important today as they ever have. But we believe attention is now shifting to the constituents of an additional kind of power: soft power.

Soft power reflects the ability of Asian countries to gain competitive advantage by projecting influence at home and abroad. Central to that influence is the profile of their major cities: they are the windows on a nation and, often, the reference point for our perception of a place.

This report focuses on that shift and seeks to shed light on how eight cities in Asia Pacific are leveraging soft power attributes—beyond politics, economics and military might—to their advantage. By undertaking this research, we wanted to contribute to the insight and understanding of those in the public, private and social sectors about the reputational drivers of Asian cities, and how they might develop strategies that facilitate and deepen their engagement with those who live in them.

As one of the world's leading and global public relations firms, we care about this: because we have offices, colleagues, and clients throughout Asia Pacific; but also because we believe Asian cities will increasingly exert their influence over the cultural, economic and political landscape of the 21st century.

THE BIG SHIFT

City growth in Asia brings with it opportunities and challenges in equal measure. In Asia Pacific, the massive and rapid shift of people into urban areas has forced governments and civic leaders to re-examine how their cities should cope with such change. Housing, sanitation, healthcare, infrastructure, corruption and wealth-disparity issues are just some of the challenges now high on their agenda.

These are hugely significant factors in country and city perceptions; but we have chosen to focus our attention on those areas of the debate where we believe we can best contribute. Intentionally, we have avoided specific research of, or commentary on, the quality or governance standards of country and city institutions. Nor do we make judgements on the merits of political and legislative systems or political activism in Asian countries or cities. Credible sources of information and comment on these areas are already widely available in the public domain.*

Instead, we have based this report on extensive research: an opinion survey of 4,147 citizens from eight cities; interviews with 20 experts in areas as diverse as media, communications, design, architecture, commerce, finance and the arts; and a comprehensive review of the commentary and observations of others. It is their collective perspective which informs the core findings of our report.

Engaging Cities: the Growing Relevance of Soft Power to Asia Cities can be utilised in a number of ways. For those responsible for elevating a city's brand, it provides direction on how soft power attributes can effectively contribute to that task. For corporate and consumer brand marketers, the report offers insight into the cultural and contextual nuance of audience engagement in cities. More broadly, however, we hope it will make a meaningful contribution to what we consider an essential debate about the influence of soft power attributes in cities across Asia Pacific.

'Creative and innovative talent has always played a fundamental role in the cultural and economic development of a city. To attract that talent in the future, civic leaders need to define and capitalise on their city's attributes and then project them effectively.'

Tim Sutton, Chairman Weber Shandwick Asia Pacific

NOTE

In developing this inaugural report we have focused on eight cities. We recognise that they are not fully representative of Asia Pacific, nor do they cover every country in the region. More so, we are aware that many countries have more than one city—particularly significant urban and cultural centres, like Beijing, New Delhi and Melbourne—that would warrant review. We will broaden the scope in future Engaging Cities reports.

¹ See for instance: Transparency International Corruption Index; EIU Democracy Index; CIA World Factbook; EIU Business Environment Ranking and Index



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A CITY PLAYBOOK

Understanding the soft power attributes of cities is an essential part of arming civic leaders with the tools to create and communicate inspiring, talent-rich environments that attract people, business and investment.

Across the diversity and geographical spread of cities in our report, our research highlighted a number of factors that contributed to their soft power benchmark strength. Highlighting those strengths presents the opportunity for cities to consider what actions they may choose to both define and amplify their attributes.

In an environment in which public expenditure is often heavily scrutinised, we believe commercial, corporate and consumer brands might consider what role they play in helping cities meet these imperatives.

The following five imperatives make up what we call a City PlayBook.

‘There is a huge amount of mobility amongst the cities of Asia Pacific. The proportion of respondents who said they have visited at least one other city, or have lived in one of the other cities, is high. That means that city brand and influence, more than ever, are created through the personal experiences of people who are not residents.’

Jen Sosin, KRC Research



IDENTITY

Cultivating a city identity that leverages country attributes whilst giving itself sufficient latitude to create its own brand is difficult. Few cities have done it well. That is why we think it has serious potential as cities search for strategies to amplify their relevance both at home and abroad.

Understanding the aggregated value of a city's soft power attributes is an essential step in building influence and reputation. But so too is knowing how to market those attributes selectively; and to whom. That makes identity a central part of city influence. Only when the identity of a place is clear can it become a reference point for future influence-based initiatives, as well as for the development of public spaces that nurture city life.

'For cities to preserve a culture that is unique to them, city leaders need to identify the make-up of that culture. Knowing what motivates and inspires their citizens is a fundamental first step.'

Jessica Cheam, Eco-Business



NEIGHBOURHOODS

‘Cities that celebrate their suburbs help bring to life the exciting and surprising places that rarely reside in the CBD.’

Julia Taylor, Baroque Bar and Bistro

As cities grow with an influx of new people, cultures and beliefs, it becomes more challenging for civic leaders to articulate a reputation that is truly representative of its many and varied facets. That is why we think neighbourhoods are so important.

Neighbourhoods are culture-clusters that make the fabric of cities more accessible. They breed sector competitiveness and development in areas of retail, creative design and manufacturing, and these qualities make the people and personalities who work there more visible to those outside. Cities with a strong and well-understood neighbourhood network deliver a more authentic experience to visitors and residents too, on account of the fact that this is where many of its soft power attributes reside.

We think neighbourhoods have the potential to be the engine room of soft power influence.



CITIZEN ADVOCACY



‘People fall in love with cities because of what they see, hear and experience. When they have the opportunity to engage with those who live there, the gap between perception and reality closes.’

Bernie Cho, DFSB Collective

In our research we saw positive confidence creep when citizens were asked about their own city. Consistently, they showed an intuitive willingness to amplify the attributes of the place they called home and to advocate on behalf of their own city; particularly when ‘competing’ with others.

Citizen advocacy is more abundant than many think and yet few cities appear to have leveraged it to their advantage. With millions of citizens in Asia Pacific increasingly moving between cities every year, we think this is a missed opportunity. These people have the potential to be a highly mobile and vocal means of projecting the soft power influence of the cities in which they live or where they have come from. With the right tools and a clear narrative behind them, citizen advocacy could be one of the most powerful forces behind a city’s soft power attributes.

THE CREATIVE CLASSES

'Diversity breeds creativity and creativity breeds innovation. Consequently, embracing diversity of perspectives can really be the catalyst for a city to reach its potential.'

Davide Agnelli, IDEO, Tokyo

The creative classes are a potent force behind city innovation. They invent ideas-led economies that bolster innovation in everything from music and technology to sustainability and design. Enabling their place in city culture and celebrating their success is an essential part of future-proofing a city's influence.

Through our research we saw evidence that the regeneration of city districts often accommodates and incentivises the establishment of creative quarters. But as cities grow, creative quarters can become gentrified and the creative classes inevitably move on. More troubling for civic leaders is the fact that the relative ease of movement between markets in Asia Pacific means that those cities that amplify their creative spirit are more able to attract talent from other markets. As innovation hubs wilt in one market, so they erupt in another.

That means that the ability of a city to retain their talent hangs on its willingness to foster a more diverse, affordable and inclusive environment in which ideas can be challenged and different perspectives embraced.



² FT Creativity and Business Report May 2014

PEOPLE POWER

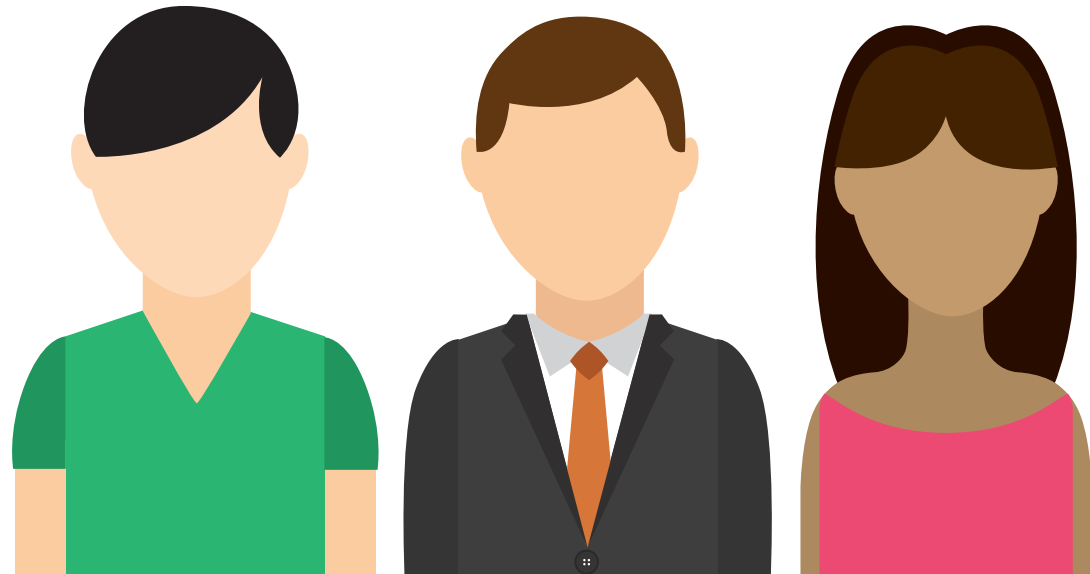
Big investments in infrastructure can be undermined by a failure to deliver an engaging experience. Engaging experiences are invariably delivered by people.

International airports and major public sporting events are a showcase for the impact of people power. Whether they take the mantle of volunteer helpers or hospitality executives, public support teams put people at ease, heighten their sense of security and deliver an enhanced experience.

We think there's a place for public service guides and information officers in cities. They provide a benchmark for service excellence and have the potential to elevate the perception of a city's accessibility. People are often the overlooked attribute of any city; and because it will always be challenging to invent a service-orientated culture, a focus on establishing more structured gestures of service could well be the move that is needed to shift perceptions and external influence quickly.

'Ultimately, it is people who are at the heart of a dynamic, vibrant city. They are the individuals who create experiences within the social fabric. They are the individuals who influence the views of others.'

Emma Joyce, TimeOut



THE RISE OF SOFT POWER

Both countries and cities have specific assets and attributes, developed intentionally or unintentionally that can be deployed to their reputational advantage. We believe those assets fall into two camps - hard power and soft power attributes.

Hard power attributes consist of all political, economic and military means available to a government in the way it influences residents and non-residents alike. National hard power attributes can have a direct impact on city interests too in the way in which they are deployed internally and externally. Soft power attributes are more diverse: they include, but are not limited to, media, digital technology, music, food, tourism, education, arts and literature, and the environment.

The focus of this Report is on the latter.

Nationally, the collective value of soft power attributes is on the rise. That is not to ignore the fact that hard power tensions in Asia Pacific remain and, in some instances, territorial disputes have increased. But as the shortcomings of using (as opposed to flexing) military muscle are readily apparent, governments and policy-makers have turned their attention to leveraging other assets available to them as they seek to exert their influence. Soft power has therefore risen on the agenda of all governments and other national and city-based institutions.

A central part of that interest is how it enables governments to attract, engage and retain people and organisations whose talents, ideas and entrepreneurial spirit directly influence the economic well-being of their country. A nation of visionaries and problem-solvers is a powerful thing.

But soft power is not isolated to the national interest alone. Because they define our perception of a place and the experience we have when there, they are equally significant to cities. From infrastructure to architecture and retail to neighbourhood diversity, soft power attributes profoundly influence the balance of Asia Pacific's multibillion-dollar tourism industry as much as they do the inward-investment decisions of those in the business community.

For those charged with elevating the reputation of city brands, soft power contributes to consumer experiences; fosters creativity and innovation; and promotes inward investment. Understanding how it works is critical. The same can be said for commercial organisations that need to interpret consumer motivation and behaviour. For domestic brands seeking global reach, soft power attributes have heightened significance. Consumer familiarity and association with the origins of a product can have a direct impact on their perception of, and engagement with, a brand. For multinational brands, a clearer insight into the nuances of a foreign market reinforces their ability to connect with those within it.

Soft power is about setting an agenda for the future as much as it is about establishing a tone for the present. We believe that the ability to articulate, connect and promote soft power attributes is now at the hub of influence for governments, cities and commercial brands alike.

'Understanding origin, its meaning and potential offers countries, cities and organisations an opportunity to create real competitive advantage and differentiation.'

Dan Dimmock, Futurebrand

³ Asia Pacific Economic Cooperation; World Travel and Tourism estimates Asian tourism to contribute \$550 billion to the region's GDP

THE RISE OF SOFT POWER

Weber Shandwick has drawn on the views of influencers, published authors and Weber Shandwick's expert marketers to determine 16 soft power attributes with particular importance to cities. We believe that for city brands to be strong—to have the power to draw visitors, investors, entrepreneurs, artists and the diversity of people that great cities need—they must perform strongly on each of these 16 key dimensions of soft power.



Tourism



Dining



Gender Tolerance



Retail &
Neighbourhoods



Politics



Arts & Literature



Media



Architecture &
Design



Desire to Imitate



Sport & Leisure



Finance



Education & Research



Sustainability



Music



Social Media



Standard of Living

CITIES OF INFLUENCE

There are now more people living in cities than those who do not. By 2030, 60% of the world's population (5 billion people) will be city dwellers. For the 3.6 billion people who currently populate the world's cities, their rationale for being there varies enormously. The presumption is that the main driver remains an aspiration for better economic prosperity but there are other factors too. For all the diversity of purpose, one thing is acutely clear: the influence of this urban congregation of humanity is profound.

Nowhere is this more the case than in Asia. The migration of people from rural communities to cities is as pronounced in this region as it is anywhere else on Earth. We now live in some of the most densely populated communities on the planet.

Because of their size and complexity, cities have therefore become soft power hubs for countries. They are the engines of economic growth, the centres for innovation and ideas and can be the primary experience of a nation for citizens and visitors alike. How a city effectively defines, connects and projects its attributes matters enormously.

For products and corporate brands, the variables amongst cities in any one country are as important as the variables amongst the countries themselves. Cities take great pride in their cultural nuances and seek clear distinctions between each other. In Australia, Melbourne and Sydney are not just rivals on the nations sports fields. They seemingly vie for the number-one spot in everything from coffee to the creative

'Creative cities are able to attract very different people. And a multicultural, multidisciplinary mix will always spark innovation and new ideas.'

Davide Agnelli, IDEO, Tokyo

conscience. It's a similar story in China with Shanghai and Beijing claiming leadership of one soft power attribute over another.

In sovereign city-states like Singapore, competition does not come from within but from across its borders. Its ability to retain its status as the commercial hub of Southeast Asia is as much underpinned by its push to be recognised as the creativity and innovation centre for the region, as it is its investment in airport and shipping facilities.

These are the reasons why cities invest in the development of their own brands. For some, it's about managing and influencing perceptions. For others, it means building a clear identity (often emotional and symbolic) to stand out from the

crowd. In both cases, a sharper understanding of the role and influence of a city's soft power attributes matters.

Cities are the proxy flag carriers for nations and, in some cases, the origin for brands. The services they provide, the people they attract and the pace at which they develop don't just inform our perception of a country. They are pivotal in the ability of that country to define the future it wants to create and the role it will play in that future.

⁴ World Health Organisation, Urban Population Growth

⁵ Melbourne named World's Most Liveable City, EIU's Global Livability Index

THE RESEARCH

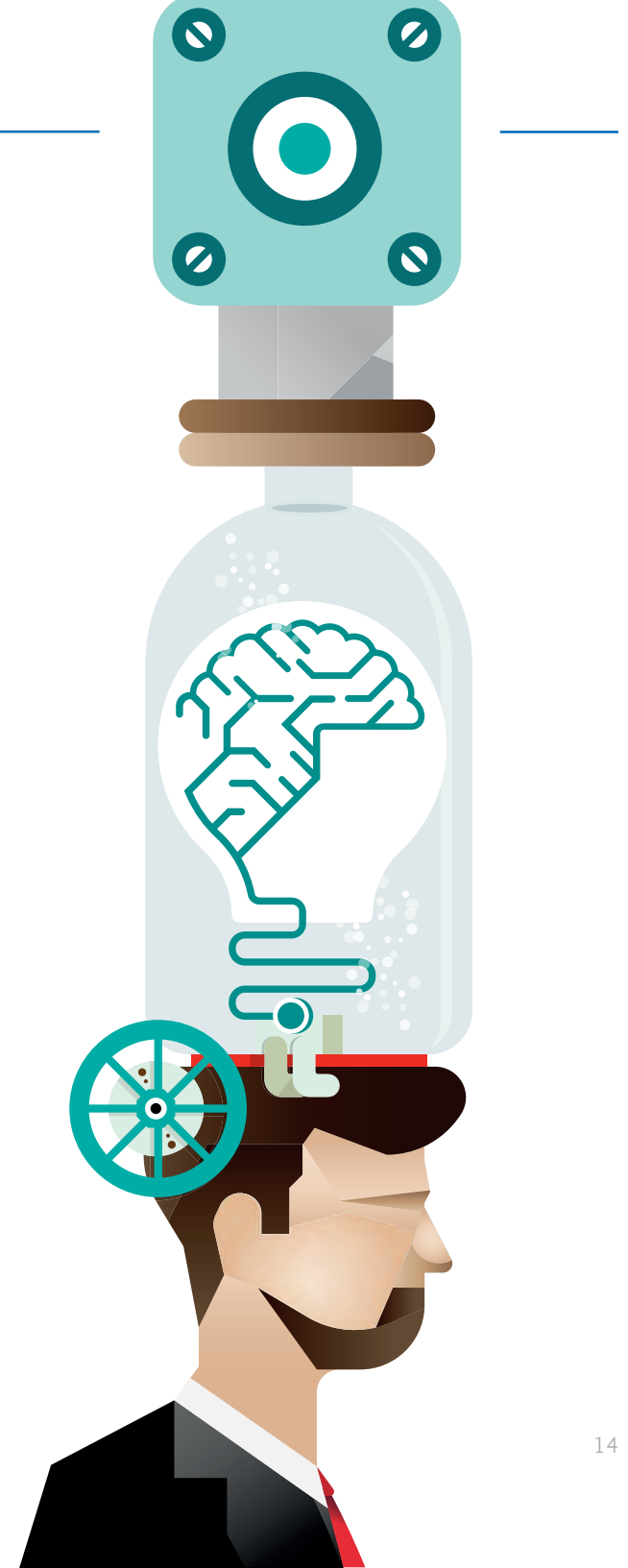
This report is based on extensive original research, including both a multi-city survey and interviews with a wide range of experts, as well as our own deep experience living, working, and marketing in Asia Pacific.

Selecting eight cities was difficult and less than ideal but we settled on those we considered significant on account of their perceived relevance to the economic, cultural and social standing of their country. Those cities are: Bangkok (Thailand); Hong Kong (China); Kuala Lumpur (Malaysia); Seoul (South Korea); Shanghai (China); Singapore (Singapore); Sydney (Australia); and Tokyo (Japan).

The survey, which Weber Shandwick designed and conducted with its research arm, KRC Research, reached 4,147 consumers across the eight cities (at least 500 in each). The survey was conducted online, with respondents screened to ensure a diverse mix of gender, age and educational backgrounds. In the survey, participants rated each of the eight cities (including their own) on each of the 16 soft power attributes.

Interviews were conducted with a carefully selected group of 20 opinion-formers, sector experts and business leaders from each of the represented markets. Opinion-formers made up a diverse panel of sector experts in trade, environment, sport, design, the arts, music, architecture, media and retail. Each participated in one-on-one interviews, providing context and perspective to the report findings and outlining their own views on the significance of soft power to cities.

The report addresses two distinct areas: the contribution of a city's soft power attributes in determining its reputation both at home and abroad; and the disparity between the perspectives of residents and non-residents about a particularly city.



SOFT POWER RATING

In the survey, respondents were asked whether they agreed or disagreed with 16 descriptive statements about each city (for example, "City X is recognised for contemporary architecture and design"). Where we say a city's rating on a specific soft power attribute is X, it means that X% agreed with that descriptive statement.

On average, cities that rated 40% or higher on a particular soft power attribute can be considered highly regarded on that attribute; those rated between 39%-26% are recognised as having some reputational strength on an attribute, but are not seen as leading in those areas; and those that rated 25% or lower on an attribute have limited reputation in that area.

At the same time, some soft power attributes are clearly more readily achieved and projected than others. For example, across all eight cities, the average rating for [Finance] was 30%, while the average rating for [Sustainability] was only 21%. These averages can be considered norms, meaning that any city seeking to gain reputational advantage on one of these attributes must well exceed these thresholds.

We saw a notable variation in the ratings offered against each metric, reflecting a shared perspective as to how cities in the Asia Pacific region are performing in certain areas. Whilst we do not see a direct correlation between this data and the value attributed to each soft power attribute, it does reinforce the fact that cultural modesty plays an important part of decision-making in cities. That modesty is best amplified in the City Self-Esteem section of our report on page 61.



SOFT POWER CITY ATTRIBUTES

In determining what constituted an acceptable spread of soft power attributes, we focused on those areas that we believed, when combined, could contribute to a meaningful understanding of a city's reputation and perceived influence. Our goal was to leverage the expertise of opinion-formers and our own marketers to identify those soft power attributes that, individually, are particularly important to city brands and, collectively, paint a meaningful portrait of these cities' reputation and influence. Our own expertise in brand communications was partly influential in deciding most relevant attributes, but so too were the views of independent opinion-leaders in each of the eight markets.

Based on our analysis of the views available to us, we examined 16 soft power attributes.



SOCIAL MEDIA AND DIGITAL TECHNOLOGY

As part of our review of modernity, we wanted to know which cities were considered to set the trends in social media and technology, not necessarily the city in which it had been most readily adopted by the population.



TOURISM

Tourism is big business. Countries spend millions in a competitive bid for tourism dollars. But what attracts tourists to urban centres is often very different to what attracts people to countries. We wanted to know which city had developed an identity that resonated strongly with tourists.



NEWS MEDIA

Outside the Asia Pacific region, a small number of news media have staked their places as internationally recognised commentators on the issues of the day. Such is their relevance, they colour our view of their city and country of origin. We looked for similar influence in Asia Pacific cities, taking into account both reach and choice.



FINANCIAL HUB

Being recognised as a financial hub brings with it a range of city-brand reputation advantages, from talent attraction to perceived stability. Our interest therefore lay in determining which city had established itself as a centre for finance and leveraged that position to its own advantage.



ACADEMIC RESEARCH AND EDUCATION

Cities that attract those with the best ideas and position themselves as centres for academic research and education create distinct advantages. We wanted to know which cities were doing a better job at projecting those assets.



FOOD, CULINARY AND DINING EXPERIENCES

From the quality and diversity of restaurants to the impact that locally attributed flavours had on others, we were interested in the influence that food-related experiences had on the perception of a city.

SOFT POWER CITY ATTRIBUTES



RETAIL STORES AND NEIGHBOURHOOD

With so many megastores and shopping malls in cities across Asia Pacific, we turned our attention to which cities are perceived to apply an innovative approach to the development of retail stores and their place in communities.



ARTS AND LITERATURE

The contribution that cities make to the arts and literature is both historical and current. We wanted to see which ones were considered to leverage both to their advantage.



ARCHITECTURE AND DESIGN

As part of our assessment of the perceived modernity of cities, we looked at the role of contemporary architecture and design in influencing that perception.



MUSIC

Music is a universal language, but some cities are believed to have a more prevalent music scene than others. We wanted to know which music scene had the greatest impact, and why.



SPORT AND LEISURE

A number of cities in our report have hosted the Olympic Games in previous years. Others have invested in more locally focused sport and leisure infrastructure. And then there are cities whose natural environment caters for less structured sport and leisure activities. We explored infrastructure in this context and the perception generated as a result.



SUSTAINABILITY AND THE ENVIRONMENT

Much is said about commitment to the environment, but we wanted to know which cities were perceived to take an innovative approach to the development and delivery of a sustainability plan that captured the imagination of residents and visitors and gave them a perception of progressive environmental stewardship.

SOFT POWER CITY ATTRIBUTES



GENDER TOLERANCE

In a global society that is increasingly more vocal about its expectation of tolerance across populations, we looked at the cities that have established a reputation for their positive and active engagement with men, women and gender-related minority groups.



STANDARD OF LIVING

Cities that are geared towards providing a high standard of living for their citizens tend to perform well across multiple soft power attributes. We wanted to see which cities were perceived to connect their natural, cultural and infrastructure assets to the advantage of those who chose to live there.



POLITICAL CENTRE

A city that enjoys a reputation as a place for political decision-making can justifiably leverage that to its advantage. In that context, we consider the ability of a city to make its own policy decisions based on its specific needs as a relevant soft power. So we wanted to know who was doing that well, and how.



DESIRE TO IMITATE

When reviewed in totality, the positive soft power attributes and qualities of a city combine to create the perception of a place that others don't just want to visit, but wish to imitate. Having sight of a perception of which cities others might want to replicate gave us a better understanding of who was delivering an effective "soft power package".



CITY REPORTS



‘A city’s soft power—its creative capital, its liveability, its networks and human assets—all come into play when we look at trade and competitiveness. No one will invest or trade with you if your cities don’t work properly. That’s why the 21st century is as much about urbanisation as it is about globalisation, especially in the Asia Pacific region.’

Tim Harcourt, University of New South Wales (UNSW)



BANGKOK

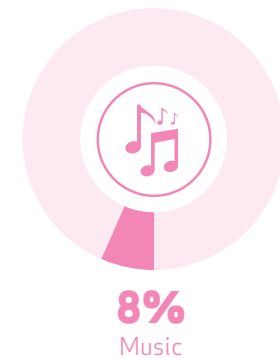
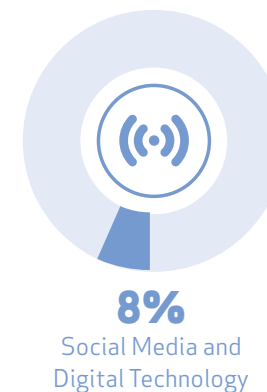
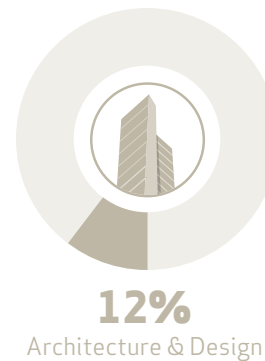
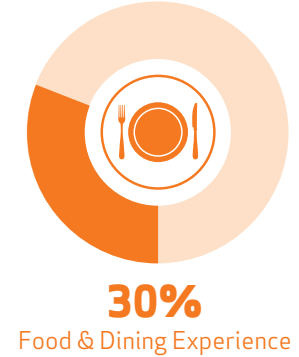
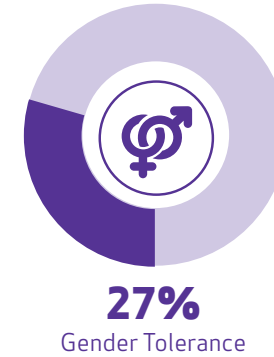
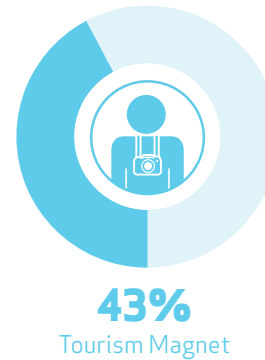
Bangkok seemingly keeps many of its soft power attributes to itself. Whilst it performs well in the tourist metrics (43%) of our report, it finds itself languishing at the bottom of the pile in too many areas of importance.

And yet there's much that Bangkok does right that is not reflected in the way it presents itself to others, region-wide.

The city has a good reputation for gender tolerance (27%) and its influence on the rest of the region with regard to its food, culinary and dining experiences (30%) is satisfactory too. But despite the creative, innovative and entrepreneurial spirit that is evident across the city, little of that is apparent to those who live outside it. Bangkok was rated poorly in areas of academic research and universities (8%), contemporary architecture and design (12%), and sustainability and the environment (8%), when compared with other cities in our report.

Nor did it perform well in its perceived contribution to arts and literature (14%), social media and digital technology (8%) or its music scene (8%).

As a city that remains proud of its Thai heritage (native Thais make up 90% of the city's population), our report suggests that Bangkok has struggled to effectively project its strengths to the region. But as one of the youngest cities in Asia with as many as half its population under the age of 20, and with some impressive infrastructure, retail and research facility developments already in place, the city has the potential to advance its soft power attributes in the future. What it would benefit from now is an orchestrated programme of influence that nurtures and highlights those strengths.



‘Bangkok’s beauty lies in the fact that its people are not subject to strict rules. With such diversity and flexibility, comes extraordinary grassroots creativity.’

Maria na Klaibaan, Tourism Influencer

BANGKOK UNCOVERED

There are two distinct faces of Bangkok. One presents the steamy bustle and clutter of a cosmopolitan city that offers a uniquely appealing experience for visitors and residents alike. The other shows the clean, crisp and contemporary movement that is delivering big advances in infrastructure, innovation and design. We think Bangkok's challenge is that its reputation for the former still outweighs the latter.

Tourism is big business in Bangkok. In the Global Destinations Cities Index 2014, compiled by MasterCard International, it was ranked 2nd behind London as the "top destination by international visitor arrivals," having topped the list in the previous year. In spite of periodic political instability, there is every reason why it could regain the top spot in the future too. As the regional hub for increased global interest in Myanmar and the Indochina-Mekong delta, Bangkok has a real opportunity to benefit by default.

Elsewhere, HSBC's Expat Experience Report consistently ranks Thailand number one in the world for ease of setting up, integrating into the community and the quality of life available to residents. Bangkok is the primary contributing factor to that ranking.

The proposed infrastructure investment remains on track too. Plans to double its spend in rail, road and logistics capacity to \$75 billion over the next eight years will better connect the Bangkok hub to other areas of the country. A steady flow of funds into the innovation sector is reflected in the highly regarded Thailand Science Park, a fully integrated R&D hub for science and technology, on the outskirts of the city.



Ironically, it is the status of one of Bangkok's strongest soft power attributes that sheds light on why the city isn't able to deliver on the reputation it might otherwise deserve. Whilst it has developed some impressive tertiary educational institutions, their respective rating when compared with others in Asia is poor (8%). Bangkok needs to make a concerted effort to better coordinate and project its strengths elsewhere.

It is already benefiting from a national push to do exactly that. A 2012-2013 campaign that positions Thailand as a clean, fresh and creatively fuelled economy is an attempt to maximise opportunity from the establishment of an ASEAN Economic Community in 2015. Whether it can do that effectively is as much dependent on how it educates and retains its human capital without eroding the entrepreneurial spirit that pervades the city.

BANGKOK UNCOVERED

Much of Bangkok's charm rests in the warmth and hospitality of its people. They are fiercely proud of their heritage and are comfortable with the slow burn of globalisation—but only if it's on their terms. There's an authenticity to Bangkok that is difficult to find in any other city in the region.

Bangkok's ability to extend its soft power influence has some limitations too. A push to foster creativity, incubate innovation and encourage critical thinking is a welcome development. But it can only push so far. Bangkok's place as a hub for global manufacturing (the automotive sector alone is valued at 10% of GDP—it prides itself as the Detroit of the East) is underscored by a workforce that has a \$5000 per capita annual income level. As other cities in Asia Pacific have learnt, opportunity breeds expectation and that can directly influence the cost of labour.

Bangkok's seeming laissez-faire attitude belies a groundswell of entrepreneurialism and creative energy. When a light is shone on those attributes, Bangkok will be far better placed to influence and inform the perception of others to its economic advantage.



Bangkok's Chatuchak Weekend Market covers an area of 27 acres and is one of the world's largest markets.

HONG KONG

的士
TAXI

TAXI

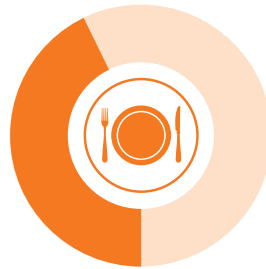
HONG KONG



54%
Finance



53%
Tourism Magnet



44%
Food & Dining Experience



30%
Media



14%
Sport & Leisure



13%
Sustainability

Hong Kong has long been seen as the financial hub for the Asia Pacific region and our report confirmed it retains the number-one position against that metric (54%). But it performed well in a number of other areas that serve to make it a better-rounded and stronger soft power city.

From top-end dining experiences to readily accessible street food, Hong Kong's reputation for influencing culinary trends in the region (44%) puts it some way ahead of Shanghai (31%) and only marginally behind Tokyo (49%) in our report.

Its innovation in retail stores and neighbourhoods (37%) was considered positive too, reflecting the importance of the relationship and proximity between a fast-paced big-brand city-centre and the smaller, more entrepreneurial retail businesses that provide equally important services to citizens and visitors alike. We believe that to be an important factor as to why Hong Kong is perceived to be a significant magnet for tourists (53%).

The city is less well regarded for its contribution to arts and literature (16%), gender tolerance (19%) and sports and leisure infrastructure (14%). It underperformed in its reputation for an innovative approach to sustainability and the environment (13%) and in contemporary architecture and design (25%) too. As contributors to the soft power status of all cities, these are the important attributes that make a big impact on others' desire to emulate the culture of a city—which is why Hong Kong lagged other cities of similar size and sophistication.

Elsewhere, Hong Kong was considered a city of soft power contradictions. It is perceived to have one of the stronger and more influential news media (30%) in the Asia Pacific region and yet its reputation as a centre for academic research and tertiary education (22%) is trailing other major cities of its type.

‘A neon skyline is impressive, but cities have to think at street level. Hong Kong is now prioritising the creation of urban spaces and experiences that encourage community interaction and a personal appreciation of the environment in which lives are lived.’

Ronald Wong, International Bank and Independent Business Owner

HONG KONG UNCOVERED

Hong Kong has enjoyed a long-standing reputation as Asia's financial hub. Likewise, its place as a key source of media influence in the region looks as robust as it ever has been. And whilst its sister cities in mainland China manage the ongoing ramifications of an urban population boom, Hong Kong has the feel of a place that is confident, established and generally at ease with itself—albeit in the context of recent Occupy protests regarding the government's plans to introduce universal suffrage.

The Hong Kong skyline breeds confidence in others too with an impressive line up of international financial and business institutions reinforcing the city's status as a centre for global commerce. Behind the city skyline sits an equally impressive mix of winding roads, boutique retail and a consumer bustle that gives Hong Kong an authenticity and character that is unique to the region.

The space, or the lack of it, defines much of what is so intoxicating about Hong Kong. The urban landscape shapes and forms social interactions that fuel a progressive energy, whether it be in design, technology and creativity (which is beginning to take root) or in the abundance of innovation in its retail stores. But space presents significant challenges too with a huge demand for social housing now competing with the economic potential that stem from development, such as the East and West Kowloon regeneration project.



Hong Kong provoked the most diverse ratings in our research, with a standard deviation of 13.3 across all respondents in all categories.

HONG KONG UNCOVERED

Elsewhere, the city's public infrastructure system is a soft power attribute that's getting a lot of local attention. Hong Kong residents, media and local government are acutely aware of the significance of their city brand status and keep a watchful eye on where they rank against a range of international metrics. Singapore remains the competitor on which most attention is focused but Shanghai is fast emerging as a challenger to that status too. Retaining their position as "Asia's World City" is a priority to both and infrastructure matters.

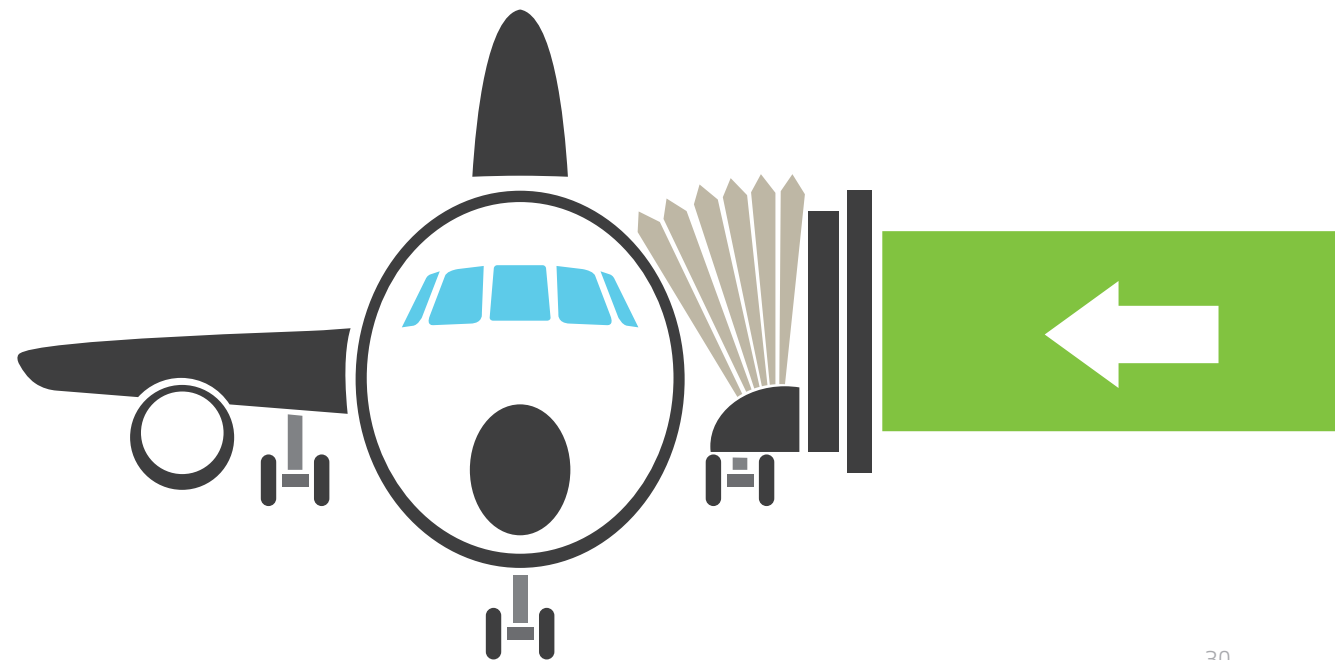
It's this consensus of approach that makes Hong Kong such a savvy soft power practitioner. According to our report, the diversity of its food, dining and culinary experiences mean that it is already recognised as one of the most influential cities in the sector. But it won't stop there. In addition to its standing in finance, commerce and media, Hong Kong is making a concerted effort to establish itself as centre for arts and literature as well as making some substantial investments in its sport and leisure infrastructure.

The city's M+ project is the Herzog & de Meuron-designed museum of 20th- and 21st-century visual culture. Scheduled to open in 2018, it has attracted significant international interest. Having already secured the services of the founding director of London's Tate Modern, Lars Nittve, to lead the project, Hong Kong is taking its future role in arts and literature very seriously indeed.

As a city with such a strong heritage in big business and finance, there's a sense that Hong Kong's push to be recognised for its many soft power assets needs time and patience. An effort to shape opinion such that it draws greater attention to other assets, without damaging those for which it is already known, is a delicate balancing act. Given the influence the recent Occupy movement may have had on public perception of the city's soft power profile, the need to get that right is all the more pressing.

That means big investment in real estate, transport infrastructure and further land reclamation is not enough. What's required now is a charm offensive that showcases areas of Hong Kong beyond the high-priced real estate that line the Connaught Road. Celebrating the raw, entrepreneurialship of its people and the rich and dynamic diversity of its many districts and neighbourhoods could well be the soft power catalyst that Hong Kong has been looking for.

There are more skyscrapers in Hong Kong than in any other city in the world. Buildings with more than 14 levels amount to more than 8,000 in Hong Kong—almost twice the number found in New York.



KUALA

KA



DARK CAVE

KUALA LUMPUR

Of the eight cities surveyed, Kuala Lumpur's soft power attributes are the least recognised across the region (a 7%-24% spread). But whilst it traded the lowest reputation ratings with Bangkok against many of our metrics, deeper analysis of our research shows that the Malaysian capital projects its soft power attributes far more effectively in some markets than it does in others.

Shanghai is a case in point. When compared with the perceptions of respondents from other cities in our report, the residents of Shanghai gave Kuala Lumpur a higher rating in six of our soft-power metrics: news media influence (7%); political decision-making (15%); innovation in retail stores and neighbourhoods (14%); and a recognised music scene (11%) and joint-highest rating in three others; social media and digital technology (9%); innovative approach to sustainability and the environment (13%); and gender tolerance (13%). It seems that because of it, Shanghai-based survey respondents, when compared with the views of the city by the residents of other cities, consider Kuala Lumpur to have a high standard of living (12%) and to be a city they would like to imitate (14%).

Contextually, these ratings remain low, of course, but it is unusual to see one city rating another city consistently higher than the respondents of other cities in the report. In part, we attribute this outcome to the fact that there could not be two cities more different in our report, in terms of size, growth and cultural and geographical diversity. In the case of Kuala Lumpur and Shanghai, it seems that opposites really do attract.

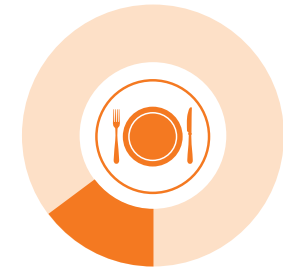
That's an important consideration for Kuala Lumpur. The city harbours a range of soft power attributes that are unique to the country. Whilst our report shows little awareness of those attributes, it doesn't make them any less relevant. Influence can be derived by amplifying that which others do not have.

Elsewhere, the residents of Sydney rate Kuala Lumpur as a magnet for tourists (24%) and respondents from Singapore showed some appreciation of Kuala Lumpur's influence in food, culinary and dining experiences (17%). The residents of Shanghai are not alone in their appreciation of Kuala Lumpur's more subtle attributes.

Kuala Lumpur looks to have been effective in projecting some of its soft power attributes into specific cities, most notably Shanghai. While it clearly has some way to go to elevate its standing in the region, it has the assets to do so. What's needed now is a concerted effort to connect and amplify them.



24%
Tourism Magnet



17%
Food & Dining Experience



15%
Politics



15%
Architecture & Design



14%
Retail & Neighbourhoods



7%
Social Media

'To connect globally, we need to nourish our global language and understand how to better project it digitally.'

Marini Ramlan, Primeworks Studios and Mural Artist

KUALA LUMPUR UNCOVERED

Kuala Lumpur is on the up, benefitting in part from a slow but distinct shift in positive sentiment towards Malaysia. While our report showed limited awareness of its soft power attributes by the residents of other cities, the fact is that Kuala Lumpur has considerable strengths that it has yet to connect and project externally. As the smallest city in our survey, we think many of its successes are perhaps overshadowed by the persistence and presence of larger cities in the region.

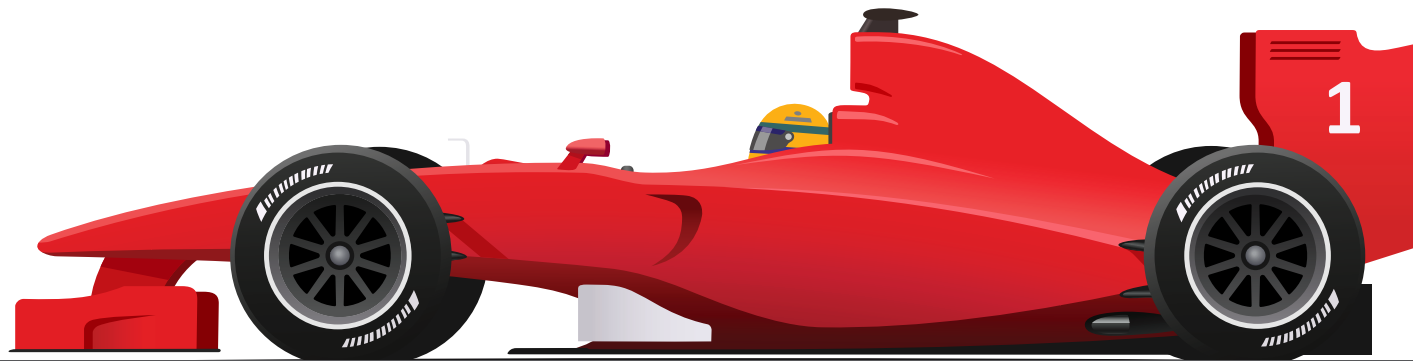
Where Kuala Lumpur shines brightest is in its diversity. The city is a melting pot of cultures, ethnicities and traditions, and a mix of architectural icons and understated residential neighbourhoods. It is surrounded by a rich tropical landscape too, giving its residents access to varied quality lifestyle choices. But with diversity comes the challenge of an ambiguous sense of identity and Kuala Lumpur's something-for-everyone message has the potential to lose its traction both at home and abroad.

Individually, Kuala Lumpur's soft power attributes are impressive. The Petronas Twin Towers, the world's tallest twin towers and the third- and fourth-tallest singular towers, remain an icon of architecture and they dominate the city's skyline. Since their completion in 1996, they have been a catalyst for new design and development in the city centre. Kuala Lumpur residents' appetite for shopping has been fuelled by the introduction of impressive new malls, including the Publika Shopping Gallery with its bold mix of international fashion brands, independent boutiques and cafes.

**Kuala Lumpur was ranked
as the 4th shopping
destination in the world
by CNN Travels in 2012.**



KUALA LUMPUR UNCOVERED



Despite our report showing that locals celebrate the delights of Malay cuisine (34% rating), 48% of Australians have never tried it.

The city's wide-ranging development initiatives look set to continue. With a significant fund now in place, a national Economic Transformation Programme (ETP) was established in 2010 to deliver a strategic blueprint for the country, fostering economic opportunities in 12 priority sectors. The Kuala Lumpur Education City (KLEC) initiative is a case in point, and the city has taken some big strides in its efforts to become an international hub for education by the co-location of international universities, local tertiary institutions, secondary and primary learning facilities and commercial residences.

There are other less direct beneficiaries from the investment program. As Kuala Lumpur's middle class grows on the back of such a future-focused funding initiative so do the industries and brands that serve it. The creative sector has been a particular winner, bringing an exciting mix of innovators and

designers to the fore, each of whom will become increasingly important as the city evolves and matures. Incubating the talent that provokes such ideas will be a primary area of focus for the city for the remainder of the decade.

Kuala Lumpur has undoubtedly benefited from one of the world's most consistent and high-impact national tourism initiatives. Now 15 years old, the Malaysia Truly Asia campaign continues to emphasise the country's remarkable landscape, its unique mix of wildlife (more than 15% of the planet's species are squeezed into it) and its place as a sanctuary from the outside world. Whether the city can retain the strengths of the diversity message whilst carving out its own identity is at this point an unknown, but positive signs abound. Moreover, as the country's cosmopolitan hub, Kuala Lumpur's role as a host for the influx of tourists should not be underestimated.

For such a small city, Kuala Lumpur has access to one of the most impressive motorsports circuits in the region too. The Sepang International Circuit sits on the outskirts of the city, next door to the recently upgraded airport and draws one of the largest crowds in the FIA Formula One and MotoGP's respective calendars. The local passion for other outdoor pursuits, more recently golf, has added to its reputation as a destination for those looking for well-priced, easily accessible sports facilities.

In many respects, the whole of Kuala Lumpur's soft power attributes seem greater than the sum of its parts. The city may not yet have a far-reaching reputation for influence in the region but there's an authenticity about the people and the place that's captivating. It's that authentic spirit that is possibly Kuala Lumpur's greatest asset and that makes the city one to watch in the future.

SEOUL



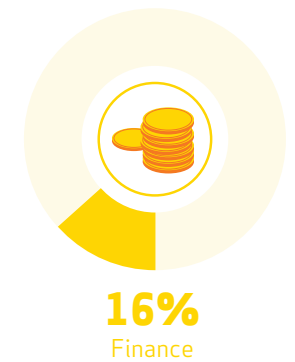
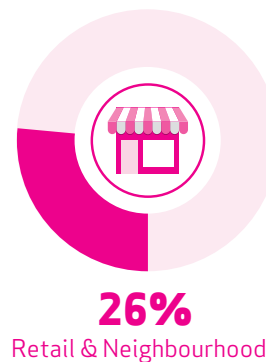
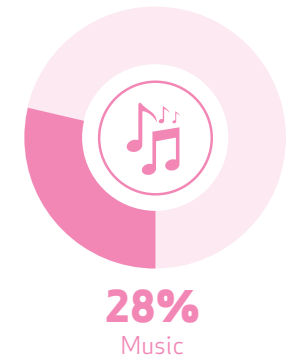
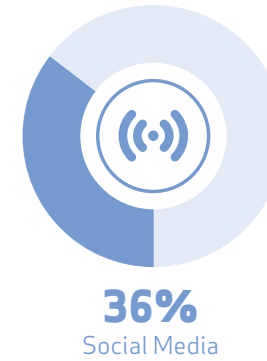
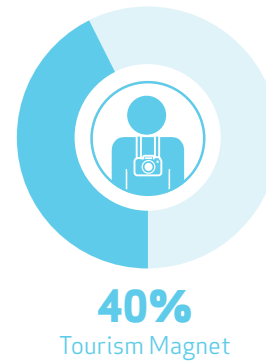
SEOUL

Seoul has enjoyed a period of economic growth and political stability that has made it a far more influential force in the region. As a city with twice the population density of New York, its soft power attributes appear to be getting more recognition too.

Whilst it hovers somewhere in the middle of the city-pack when pitched against other metropolises in our report, there are some notable areas of influence that reflect its growing cultural presence and relevance in Asia Pacific.

Seoul's reputation as a trendsetter in social media and digital technology (36%), coupled with recognition of its music scene (28%), shows signs of a city that has embraced its youth culture. The city's tourist appeal (40%), influence in food, culinary and dining experiences (29%) and sport and leisure infrastructure (20%) combine to create the perception of an increasingly forward-thinking, active city that results in an interest on the part of other cities to imitate the Seoul culture (24%).

Where Seoul appears to lag other major cities in our report is in its relevance as a financial centre (16%) and its perceived gender tolerance (12%). Elsewhere, the city's clearly defined sustainability initiatives have yet to pay reputational dividends, with limited recognition of the innovative approach being taken in this space (18%). Comparably, Seoul's focus on good urban planning was acknowledged by its own residents (31%), providing some evidence that a well-structured and implemented civic programme will always garner more interest at home.



‘What attracts younger people to Seoul is not just the music. They want to experience the whole 360. Seoul has finally come into its own as a truly cosmopolitan city.’

Bernie Cho, DFSB Collective

Tesco, the British multinational grocery and retailer reported that its total sales of Korean food had more than doubled as a result of the popularity of “Gangnam Style”.

Seoul has the spirit of a city that is in its ascendancy. From far-reaching urban development initiatives to its celebrated innovation in media, music and technology, Seoul has established a solid reputation as a city that succeeds on its own terms.

It is a city of divides too. The Hangang River accentuates a cultural fracture with different neighbourhoods developing their own place as centres for retail, finance and design; there’s a distinct tension between Seoul’s rich history and its forward-thinking technology-fuelled future; and the city’s high-pressure business and education culture can seemingly collide with the serenity of the many temples and parks that populate the area.

Seoul may not have the retail cachet of some other Asian cities, but it can seriously surprise and impress. From the likes of grand Shinsegae department store, with its perfectly manicured staff and exemplary service ethic, to the grungy independent boutiques that scatter the city, Seoul delivers an irresistible shopping experience to visitors and citizens alike.

The same can be said of its technology infrastructure. The Government’s investment in high-speed broadband services has delivered Seoul the world’s fastest average Internet connection speed, enabling enhanced education and healthcare benefits for its 10.5 million citizens. Perhaps not surprisingly, it has also helped underpin the explosion of a

public entertainment gaming culture that is unique to the city. Elsewhere, the strength of consumer lifestyle, automotive and industrial brands on the world stage have contributed significantly to Seoul’s reputation as a leader in technology-related sectors.

Of all its soft power attributes, music and media remains Seoul’s greatest cultural export. The impact of K-Pop has been profound but so too has its TV drama. According to the KTA (Korea Trade Association), a direct correlation can be drawn between the popularity of shows, like “My Love from the Star”, and the increase in exports of some consumer goods.

But the resulting so-called Korean Wave has had a far deeper impact than impressive sales spikes. Demand for Korea’s urban lifestyle cues are on the rise. The trend is particularly prevalent in China, and Seoul-based domestic companies are responding by making big investments in establishing their own flagship stores as they exploit this opportunity.

Seoul is acutely aware of the challenges of its past, and its investment in its future is perhaps therefore better defined and more pronounced than in many other cities. Incheon International Airport, for example, is a modern gem, recently connected to the city centre by a high-speed rail link (KTX). And Seoul’s subway system is one of the best in the world. But like many cities of its size, Seoul’s roads can become quickly gridlocked, making the experience of urban travel far from ideal.



SEOUL UNCOVERED

When compared with Seoul, there are few cities in Asia Pacific that place such an equal emphasis on their heritage-listed architecture as they do the latest statement in contemporary building design. Perhaps, then, it is the absence of a definitive vernacular or bold, iconic building that distracts from this fact and has left Seoul with little reputation for its contemporary architecture and design.

Seoul has high expectations of itself, although it is not yet willing to say too much about it. Of all the cities in our report, the citizens of Seoul were less likely to rank their city above others (a 5% variance against aggregated rating vs. 18% average across all cities). Such modesty seems representative of what we see and hear elsewhere. There's a privacy and authenticity about Seoul that is compelling.

In the future, we expect Seoul's soft power attributes to become increasingly relevant in Asia Pacific. A strong work ethic, high talent retention, world-class sport and leisure facilities and smart urban development programmes, like the \$18 billion National River Restoration Project all contribute to the evolution of a city that has seen an extraordinary period of change in the last 25 years. It has much to be proud about.

Looking ahead, Seoul's ability to shape its preferences at home and abroad without the need to rely on coercive forms of persuasion is now dependent on how and when it chooses to connect and amplify its many soft power assets.

At 570,000 m², Seoul's Digital Media City is 1.7 times the size of London's Canary Wharf.

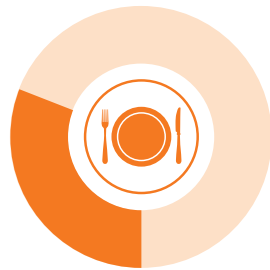




SHANGHAI



32%
Tourism Magnet



31%
Food & Dining Experience



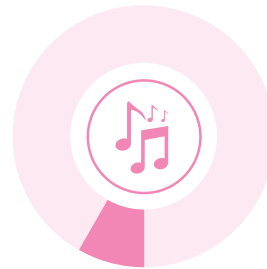
21%
Media



20%
Retail & Neighbourhoods



20%
Education & Research



11%
Music

Shanghai is globally recognised as one of the world's fastest developing and most dynamic cities. With a forecast population of 24 million people by the end of 2014, it continues to be one of the most diverse and exciting places to live and visit.

But despite the noise and bustle of the city, Shanghai's ability to project itself as a soft power hub across the Asia Pacific region was surprisingly modest.

Shanghai has a solid reputation for its influence in food, culinary and dining experiences (31%). It is also recognised for its contribution to arts and literature (21%) when compared to other cities in our report: a nod to the resurgent populism of Chinese art.

Nevertheless, the success of big-brand shopping malls throughout the city do little to whet the appetites of those looking for a more innovative approach to retail and neighbourhood development (20%). Nor does it enjoy a particularly strong reputation for academic research and tertiary education (20%) or environmental stewardship (10%), ranking sixth against other cities on both counts.

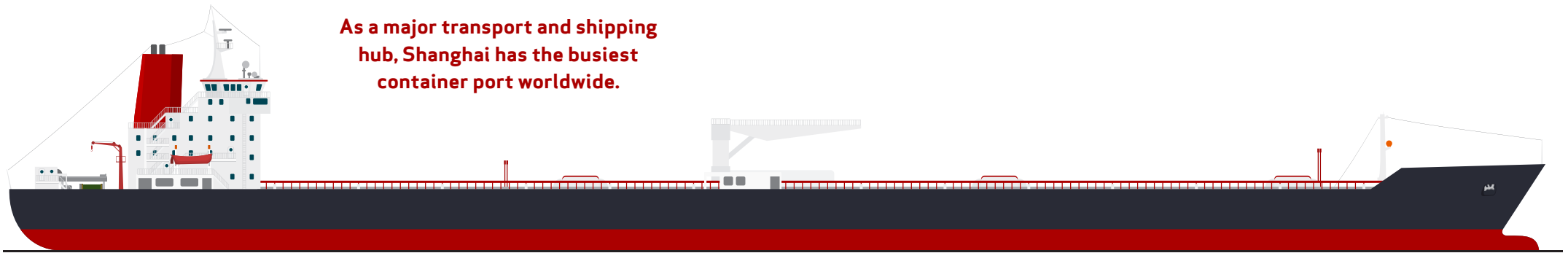
Shanghai's sport and leisure infrastructure (16%), its music scene (11%) and its media (21%) are equally below par, and it is one of the lowest performing cities when examining its overall tourist appeal (32%) and reputation for gender tolerance (11%).

‘In every field in the next five to 10 years, the world will be exposed to beautiful ideas and innovations with a distinct Chinese personality. The future for Shanghai and other Chinese cities is bright and we should be very optimistic and happy about that.’

Haim Dotan, Professor Detao Masters Academy

SHANGHAI UNCOVERED

As a major transport and shipping hub, Shanghai has the busiest container port worldwide.

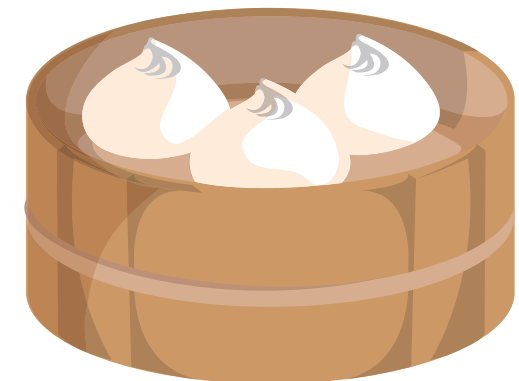


Shanghai's confidence is palpable. Having grasped the opportunities that came with China's relaxation of foreign investment policies in the 1980s, the city quickly became a national gateway to multinationals and it has never looked back. In many respects, 2010's Shanghai EXPO was the pinnacle of that energy and the point at which it took on global-city status. For some residents, that simply returns Shanghai to its rightful place as the commercial capital of Asia, a position it last held in the 1930s.

Whether it's premature for Shanghai to reclaim its crown is difficult to say. The influx of international investment mirrors the massive population growth in the city and Shanghai now boasts the largest foreign community in Mainland China by some distance. It is spearheading economic and social liberalisation too, which drives a more vibrant, dynamic and entrepreneurial culture. Initiatives such as Shanghai's Free

Trade Zone (SFTZ) reflects the focus of the city's leaders to develop a commercial environment that is equally attractive to local trade as it is to foreign investment.

On account of its size, history and cultural diversity alone, Shanghai has a rich cultural fabric that touches everything from food and dining experiences to digital technology. But size does not necessarily translate into soft power influence and our report shows signs of a quiet resistance to Shanghai's confidence from those who live in other countries. That could be a response to a number of factors. Certainly an upsurge in the acquisition of overseas assets and a more conspicuous display of material wealth plays some part in what may well simply be a hint of civic jealousy. Whether such a response is valid or justified is both subjective and irrelevant. The fact is, it looks to be contributing to Shanghai's soft power standing and that matters.



SHANGHAI UNCOVERED

What size does breed is a diversity of ideas and expression and, because of it, there is no shortage of cultural choice for the residents of Shanghai. The city's burgeoning festival, music and gallery scenes are cases in point and they have quickly established a reputation for themselves both locally and overseas. Shanghai's food, culinary and dining experiences are equally well regarded. From local delicacies served unceremoniously on street corners to some of the finest restaurants in the world, Shanghai provides an experience that is as diverse as it is memorable.

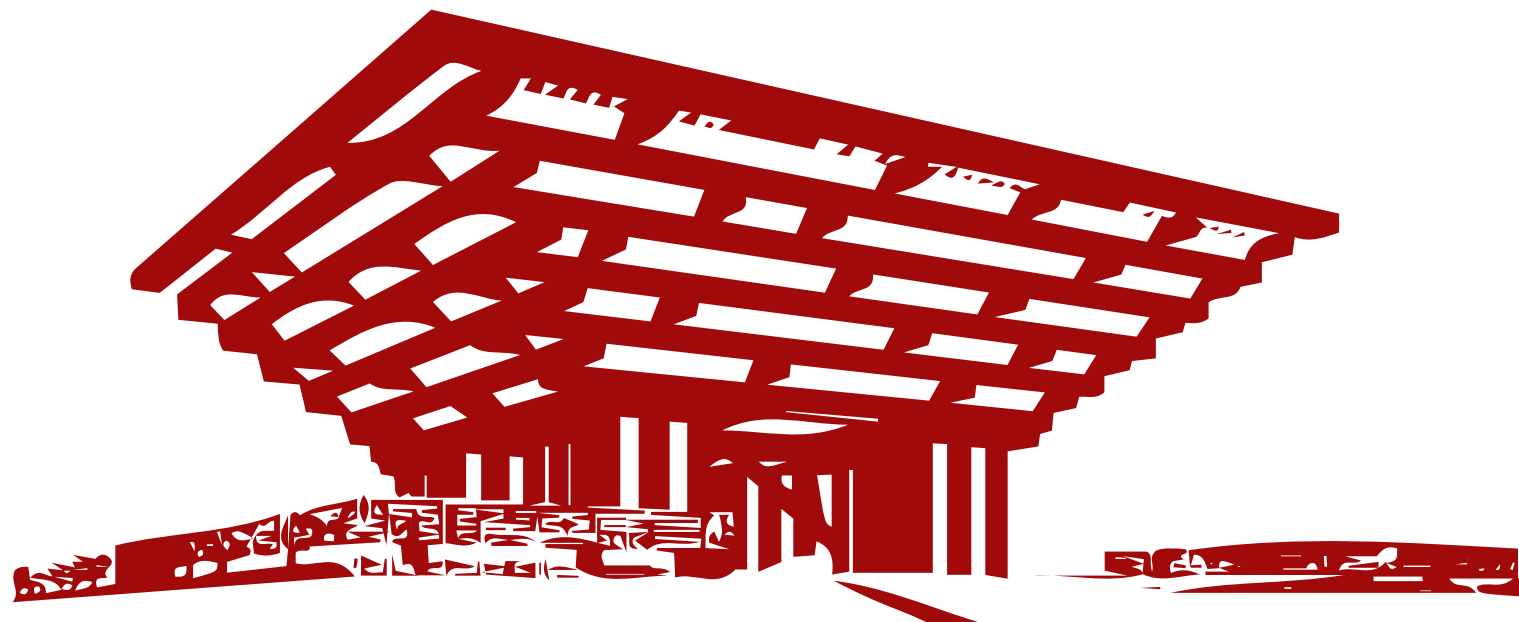
Shanghai has tackled an urban population explosion through an impressive, strategically grounded and ongoing infrastructure build. But it has not done so at the expense of its rich architectural heritage. The river divides Shanghai's revitalisation initiatives, with the Huangpu and Hongkou Districts of Puxi seeing some serious preservation efforts whilst the Pudong area has become the centre for dramatic contemporary commercial builds. Meanwhile, the Shanghai Metro system, the fastest growing and longest transit system in the world, is designed to connect the new with the old.

Shanghai's reputation as a city that demonstrates little in the way of innovation in sustainability and the environment is likely to have as much to do with the unrelenting pace of the city's growth as it does China's broader reputation in the space. Pollution remains a serious problem but there are signs that this is being addressed. Currently city authorities do not charge for household or waste collection. That is about to change. The 12th National Five-Year Guideline calls for cities to introduce a fee structure by 2015 and that is a serious incentive for civic leaders to act. Elsewhere, Shanghai has pledged to cut total waste by 25% by 2015, based on MSW volume; another sign of shift in sentiment towards environmental stewardship.

Shanghai's push to be recognised as a finance and creative centre in the region is bearing fruit with multinational organisations opening up Innovation and R&D centres in and around the city. Its keenness to foster a healthy mix of luxury brands, burgeoning boutiques and alternative design options in the retail space is an acknowledgement of the significance it places on diversity in the promotion of consumer choice.

The city isn't yet the soft power centre of the Asia Pacific region. Nor is it considered a trendsetter in areas as diverse as digital technology, academic research or gender tolerance. But Shanghai is nothing if not adaptive. It understands that soft power cannot be delivered with a sledgehammer and it is active in ensuring visitors and residents have sight of the many exciting and dynamic attributes of the city.

What makes Shanghai such a unique Chinese city is that it has managed to create the framework of an effective city brand. It has built a reputation for itself as a centre for overseas business investment whilst amplifying its cultural and heritage attributes, both acutely distinguishing factors. What it needs now is the means to showcase housing affordability, health, education and, more broadly, the quality of life it offers to its residents. We think Shanghai is on the cusp of becoming a soft power beacon for other cities in China.





SINGAPORE

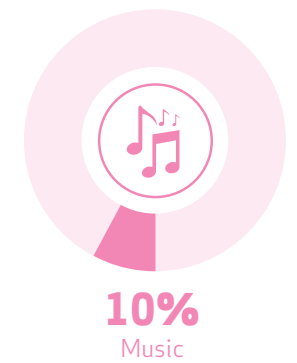
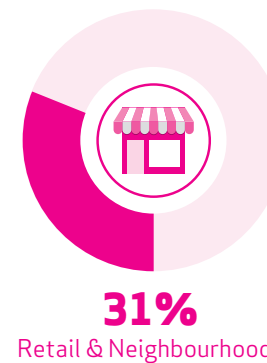
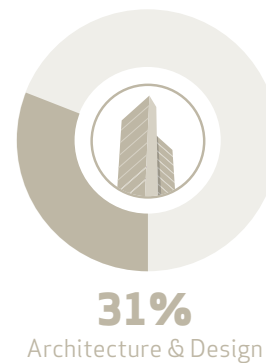
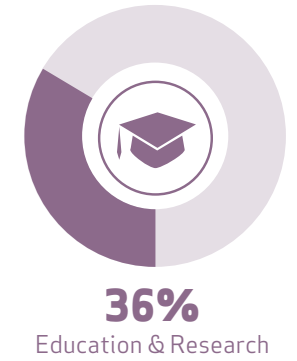
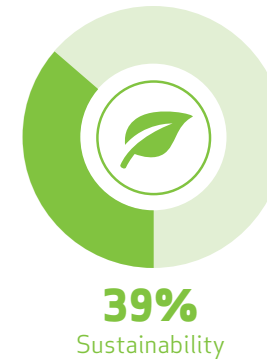
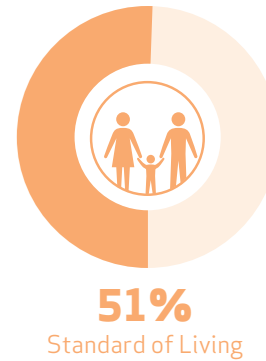
SINGAPORE

Singapore performed well against all but two soft power metrics. Its consistency across such a large and diverse number of attributes is impressive for a city-state that has yet to celebrate its 50th anniversary of independence.

Of all the cities in the region, it is recognised most for its innovative approach to sustainability and the environment (39%). This is perhaps helped by the fact that as a small, sovereign city-state, it has the opportunity to create a consistent experience for residents and visitors alike. The government's commitment to create a "city in a garden" along with continued investment in a highly effective public transport network is clearly working.

Singapore's positive rating in architecture and design (31%) and innovative retail stores (31%) highlight the importance the city has placed on creating an exciting shopping experience in the midst of a densely populated residential environment. Along with its good reputation as a centre for academic research and tertiary education (36%) and comparable strengths in sport and leisure infrastructure (20%) when mapped against other cities in our report, its soft power appeal makes it an attractive place to live and visit for young and old alike.

Singapore demonstrates some regional influence in food, culinary and dining experiences (26%) but is rated sixth when compared with other cities in our report. Nor does its music scene (10%) grab the attention of those outside its borders. Despite this, it is considered to offer the highest standard of living (51%)—the same as Tokyo—of those cities in our report and, with the exception of Tokyo (44%), has a culture that most others would like to imitate (28%).



‘In today’s Singapore, its much admired attributes and assets are the consequence of the power of its unconventional ideas and the application of human ingenuity to defy strategic constraints.’

Eugene Tan, Singapore Management University School of Law


SINGAPORE UNCOVERED

Singapore is a case study for successful urban growth. Under the leadership of former Prime Minister Lee Kuan Yew, the city-state has transformed itself from a desolate outpost in the 1950s into one of the most impressive and efficient city environments in the world. Much of its success can be attributed to a clear plan, beautifully executed.

A key part of that plan currently rests in Singapore's Intelligent Nation (IN2015), a typically bold initiative that is designed to fuel innovation and creativity through the development of an ultra-high speed infocommunications infrastructure. It appears to be working. Exports are up; technology-based jobs have grown; and the country has emerged as one of the leading cities in the World Economic Forum's Global Technology Report, measuring the impact of ICT on national competitiveness.

As a city-state, Singapore benefits from many of the soft power attributes otherwise claimed by countries. The extraordinary efficiency of Changi Airport, consistently voted the world's leading airport, coupled with the ease of access to the city, makes for a particularly positive experience for those arriving for the first time. Similarly, any city would welcome the opportunity to have Singapore Airlines as its personal flag carrier. The impact it has on the perception of the city is unrivalled.

The same can be said for the visibility of Singapore's environmental stewardship. It has a reputation as one of the cleanest cities in the world. Its Singapore Green Plan, updated in 2012, means that 10% of Singapore has been designated parkland. Unsurprisingly, technology is seen to play a part in its efforts to deliver a more efficient and sustainable city too, and to manage air-pollution issues stemming from foliage-clearing practices in countries nearby.



Singapore is currently ranked as the most expensive city in the world.



Singapore is the only Asian city to rank "well above average" in the Siemens Green City Index.



SINGAPORE UNCOVERED

Singapore is seen as one of the region's most desirable centres to receive an education or conduct research. It's easy to see why. The city has made judicious investments in primary and secondary education facilities and has a consistent reputation in tertiary studies, with ICT an acknowledged standout. Technology again plays a big part in the city's reputation as a regional hub for science-based research. The fact that the National Research Foundation sits within the Office of the Prime Minister is testament to the role R&D is perceived to play in the development of a knowledge-intensive, innovative and entrepreneurial economy.

Singapore has long been known as a powerful financial hub on account of its reputation as a safe, efficient and corruption-free environment for business and investment. Its efforts to accelerate its soft power attributes to its economic advantage have gained traction too. The Esplanade, opened in 2002, has quickly become one of the region's busiest arts centres and the slow-burn success of the city's Biennale has contributed to its standing. But according to our research, Singapore's contribution to the arts, literature and music scenes have yet to capture the imagination of those who live outside the city.

At the other end of the spectrum, its innovation in retail and neighbourhoods is highly regarded throughout Asia Pacific. With a high density of international brands and a burgeoning creative spirit threading through the many boutique stores in areas, such as Ann Siang and Tiong Bahru, Singapore is a place where shopping has become a national pastime. And it looks like everyone wants to join in.

Singapore's high standard of living is also acknowledged, region-wide. An attractive tax structure is a certainly contributory factor but we think it is its efficiency in delivering a diverse experience that makes it a place other cities want to emulate.

Like any city, Singapore is not without its challenges. Its size, its commitment to retain its garden-city status and its ability to attract and retain talent in an increasingly competitive global economy means it has to continue to invest in the innovation and ingenuity that has helped it overcome past issues. But for now, Singapore enjoys some serious soft power muscle which it seems to know how, and when, to flex to its advantage.

Singapore is seen as one of the region's most desirable centres to receive an education or conduct research.





SYDNEY

SYDNEY

Sydney has long been recognised for its soft power attributes, most notably in architecture, design and leisure pursuits: the Opera House remains one of the world's most iconic architectural statements; and the city's natural beauty and temperate climate help underpin its reputation as a place for outdoor living.

There's no surprise, then that our report shows it to top the list on all of these fronts. Sydney continues to embrace contemporary design in the built environment and a flurry of young designers of international repute has ensured the city remains at the forefront of progressive architecture and design (42%). While many of Sydney's sporting passions lie in non-mainstream and locally recognised games (AFL; cricket) with little traction in the region, the city continues to be seen as the leader in sport and leisure infrastructure (40%).

It is the soft power leader in the arts too, with those surveyed considering it to have the most influential music scene (34%) in the Asia Pacific region and to be a major contributor to the arts and literature (31%) sector.

But there's a sense that Sydney is beginning to lag in areas that will impact its ability to fully leverage its soft power status in the future. Whilst the city has a thriving restaurant scene, its influence in food, culinary and dining experiences (16%) is poor: Sydney came last among the cities surveyed.

It also performed poorly in its perceived ability to set trends in social media and digital technology (15%) and—despite the global reach of Fairfax and News Corp and it being the only country in the region where English is, without competition, the first language—its news media is not deemed to be of particular influence (21%).

There's little doubt that Sydney remains an attractive place to be. It continues to be a magnet for tourists (49%), provides a high standard of living for its residents (42%) and has a culture that others would like to replicate (24%). It is also recognised as the most gender-tolerant city (31%) of those surveyed in the region.

Our report shows Sydney to perform well across a number of soft power metrics. But it also flags areas where the city needs to put more focus if it is to remain one of the more influential cities in Asia Pacific.



49%
Tourism Magnet



42%
Architecture & Design



34%
Music



31%
Gender Tolerance



16%
Food & Dining Experience



15%
Social Media

‘Sydney is such an “Instagrammable” city. That’s great, but it’s also distracting from what’s really going on.’

Emma Joyce, TimeOut

SYDNEY UNCOVERED

Sydney has performed a delicate reputational balancing act in recent years, transitioning from an easy-going larrikin city to a smart, creative commercial hub. While it is perceived to have grown up enormously during that time, it has managed to lose little of its charm on the way. It continues to be globally recognised as one of the most beautiful and desirable cities in the world in which to live and work.

Sydney is indebted to Mother Nature in more ways than one. More than just a pretty city, its temperate climate, ocean beaches and natural harbour (the world's largest) make Sydney a place that is about outdoor living, something that contributes to the character of those who live there. In fact, our Report shows that Sydneysiders rate their own city more highly than the citizens of any other urban centre studied.

Where there's an outdoor lifestyle, there's usually a heightened participation in sport and recreational activities, and Sydney does not disappoint. Citizens and visitors alike continue to enjoy the legacy of Sydney's location as host of the 2000 Olympic Games: whether it be original venues, such as Olympic Park or the \$40 million Ian Thorpe Aquatic Centre, completed in 2007. We think it's a combination of these factors that have made Sydney the most recognised city for its sport and leisure infrastructure.

Sydney receives equally high accolades for its contemporary architecture and design and that says much about the city's image as a progressive and forward-thinking built environment. Sydney's residential design is as internationally celebrated as its commercial builds. So too are its architects, with the likes of Prizker Prize-winner Glenn Murcutt AO continuing to set a benchmark in global design. And, of course, there's the Sydney Opera House: still an icon of contemporary architecture despite the fact it has recently celebrated its 40th birthday.

Our Report shows that Sydneysiders rate their own city more highly than the citizens of any other urban centre studied.



SYDNEY UNCOVERED

Under the leadership of long-standing Mayor Clover Moore, the City of Sydney Council has made concerted efforts to manage its growth and development in the context of strong environmental management policies. From One Central Park's green wall façade to Bangaroo's 6 Star Green rating, new builds are contributing to the delivery of the city's environmental management plan, Sustainable Sydney 2030. And similarly the Sydney Cycleways initiative has seen a 100% increase in Sydneysiders using bicycles for transport, underpinned by a 200km cycle-lane network.

Elsewhere, a series of soft power attributes contribute to Sydney's reputation as a place where creativity has a distinct influence over the cultural outlook of the city. The impact of VIVID (the Festival of Light, Music and Ideas), the Sydney Writers Festival and the Festival of Dangerous Ideas, have garnered international recognition. So too has its contingent of Hollywood A-List actors drawn attention to Sydney's cultural dynamic - from Cate Blanchett's artistic director role at the Sydney Theatre Company to Hugh Jackman's dramatic appearance on the Oprah Winfrey Show, beamed live from the Opera House.

Our report highlights Sydney's exceptional reputation for a flourishing music scene too. While the city has an impressive array of clubs, DJs and innovators in music, it is likely that as the region's only Western city some of that sentiment can be attributed to the broader influence of Western music in Asian society.

Where Sydney is challenged is in the perception of its food and cuisine and its retail and neighbourhoods. Of the cities surveyed, Sydney's central business district (CBD) is the only one that fails to take on a new spirit and energy in the evenings. Many of its retail stores close at 7pm and the city empties; that leaves a big impression on those who are left behind—predominantly visitors. But the fact is, Sydneysiders like to spend their evenings in their neighbourhoods, making each of them a hive of activity. Sydney's challenge is how to connect these neighbourhoods to the broader city experience.

The same can be said about food, cuisine and dining experiences. Sydney enjoys some of the finest and most diverse food in the world; but it has not adequately defined what that food is, which is an important factor in rationalising why it languishes at the bottom of the reputation table when it comes to perceived influence in this area.

Identity is at the heart of every city's ability to exert its influence elsewhere. That identity is rarely easily defined. It is no small irony, then, that a concerted focus on Sydney's segments and diversity across many of its soft power attributes may well result in the establishment of a clearer, better interpretation of the city as a whole.





TOKYO

Tokyo is the soft power hub of the Asia Pacific region. As a top-two city in all but one of the identified soft power attributes, Tokyo seems to have found the balance between fast-moving, forward-thinking, hyper-contemporary megalopolis and a place where deeply entrenched social rituals are the foundation for service quality, commercial artisanship and attention to detail.

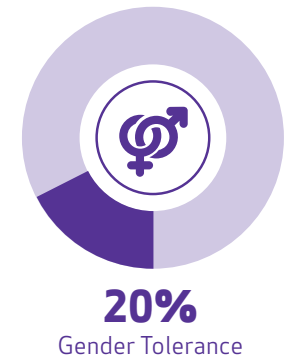
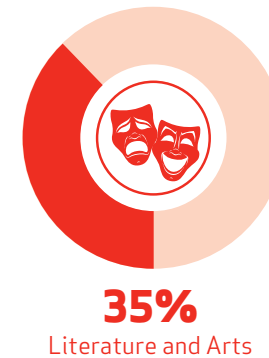
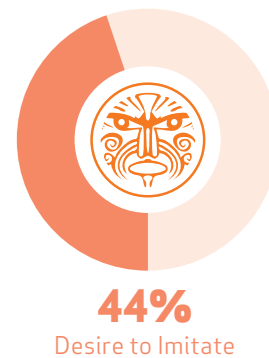
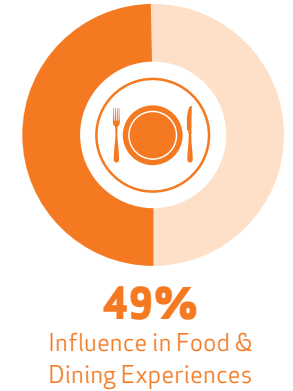
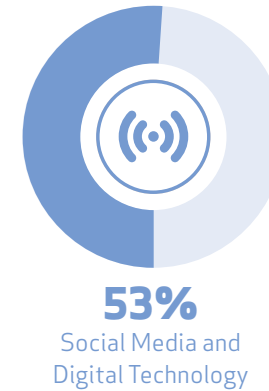
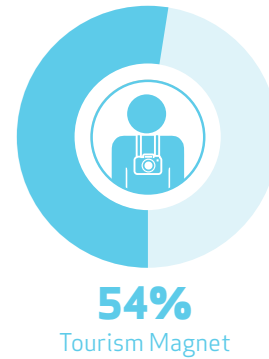
Its influence in food, culinary and dining experiences (49%) has had a profound impact on the taste buds and expectations of residents and visitors alike; its innovation in retail stores and neighbourhoods (47%) is a showcase for combining the old with the new in tight, urban centres; and its rich history in literature and the arts (35%) remains unrivalled in the region.

Elsewhere, Tokyo's position as a centre for academic research and tertiary education (45%) is significantly higher than any other city surveyed. So too is its perceived influence on social media and digital technology (53%). And its news media is considered to be the most influential in the Asia Pacific region (39%).

But what's most impressive about Tokyo's soft-power status is the fact that its attributes combined make it a place that people don't just want to visit, but to emulate too. The city topped the list as a magnet for tourists (54%) as well as having a culture that other cities want to imitate (44%).

Tokyo's only glitch in its soft-power standing is its perceived views on gender tolerance (20%). But even there, it sits comfortably in the middle of the city-pack.

Elsewhere, Tokyo's reputation for contemporary architecture and design (41%) is ranked highly despite the fact that more than 9 million people are squeezed into the city. And it is recognised for its approach to sustainability (35%) and an impressive sports and leisure infrastructure (31%) all of which are contributing factors to the view that it provides a higher standard of living to its residents than any other city (51%) with the exception of Singapore, with which it shares the same rating.



‘In Tokyo, neighbourhoods have developed over centuries in an environment of healthy competition. So a rich variety of local characteristics and businesses has evolved to give visitors a uniquely diverse experience in just one city.’

Hirofumi Nomoto, Tokyu Corporation

TOKYO UNCOVERED

All cities are unique. It's just that some are more unique than others. Tokyo is one such city. From its bold, clean and contemporary skyline, to the web of power lines that shroud the narrow alleyways below, Tokyo is a city of contrast and surprise.

Perhaps the biggest surprise is the fact that it works at all.

When we take a deeper dive on the soft power attributes of Tokyo, there are no striking differences between them and those of the other cities in our Report. Its leadership in music, media and technology has lost a little of the shine of previous generations. Tokyo's infrastructure, architecture and built environment are impressive, but not necessarily that much more advanced than the likes of Seoul, Singapore and Sydney.

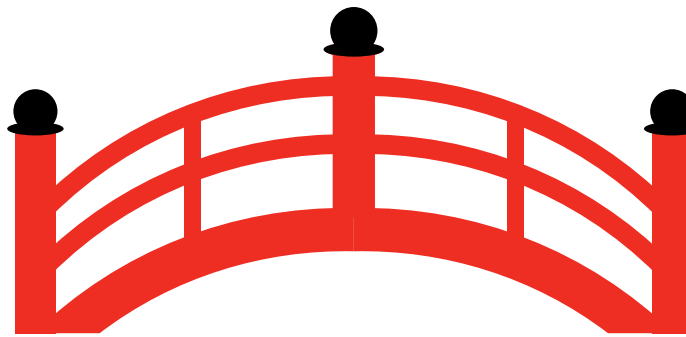
Part of the reason Tokyo appears able to exert such soft power influence is because of three intangibles that connect its many attributes: efficiency; service quality; and a deep-seated history of principle, ritual and stoicism. These cultural drivers are at the heart of Tokyo's strengths and are a reminder that soft power influence is grounded in behaviour and experience as much as in investment and development.

Subtle differences are keenly evident elsewhere. Tokyo's perception as a leader in innovation in retail and neighbourhoods suggests that there is an appetite for diversity in the retail experience in Asia Pacific. The megamall is less obvious in the city, with luxury brands preferring to create independent statements of architectural design in their own spaces. The iconic Herzog and de Meuron Prada epicentre store in Ayoyama is a case in point. Elsewhere, Tokyo celebrates its neighbourhoods as clusters of culture that cater to the needs and interests of residents and visitors alike. Ginza, Shinjuku and Shibuya are each distinctive with their own character and enjoy strong brand personality traits.

Tokyo is able to exert such soft power influence is because of three intangibles that connect its many attributes: efficiency; service; and a deep-seated history of principle, ritual and stoicism.



38% of Tokyo is designated as national parks.



TOKYO UNCOVERED

There are more Michelin-starred restaurants in Tokyo than any other city, worldwide.

Officially, Tokyo is a metropolitan prefecture, not a city.

Shinjuku Station is the busiest in the world, with 3.6 million passengers per day.

The fact that Tokyo has had to become more reliant on its soft power attributes than other cities in the region might go some way to explaining its perception overseas. As a city that has struggled with a backlog of economic challenges at a time when many of its neighbours have flourished, Tokyo has had to work harder to ensure its influence is multifaceted. The 2020 Olympic Games will likely be the pinnacle of this effort, giving the world a window onto the unique experience that comes with spending some time there.

In the lead up to that global event, Tokyo is delivering on a number of smart investments that will enhance the sense of occasion for those visiting the city as much as the 13 million people who currently live there. Innovative sustainability initiatives are high on the agenda with the TMG (Tokyo Metropolitan Government) laying out a clear 10-year plan to reduce greenhouse gas emissions across the city by 25% (when compared to 2000 numbers). The strategic push is focused on an increase and conservation of green areas in the city, advanced resource recycling programs and a tougher regulatory environment in regard to fuel types and construction.

Tokyo has consistently been a standout performer in independent studies that assess quality of life and our Report reinforces the perception of the city as a well-regarded and highly influential urban hub. It epitomises a contemporary city that breeds innovation, creativity and energy and that attracts huge interest and, inevitably, talent. But it does so on its own terms and without ever forgetting that *omotenashi*, the Japanese name for hospitality, can never be far away.

CITY SELF-ESTEEM



SELF-ESTEEM

Amidst the frustrations and criticism that bubble to the surface of blogs, online forums and the weekend letters page of any city broadsheet is a deep-seated pride in the place that people call home. In compiling this report, we were interested in understanding where that pride came from and how it influenced people's judgement about the city in which they live.

Moreover, we wanted to understand the difference between the perspective of residents of a particular city and those who live outside it. City self-esteem is a powerful asset but it presents challenges for the public and private sectors to exert influence consistently and on their own terms.

Neither is city self-esteem limited to those urban centres with a more ambitious, assertive or deep-seated cultural mind-set. Of the eight cities in our Report, residents consistently rated their city above the others surveyed. City patriotism and civic pride is life.



METHODOLOGY

The residents of every city in our Report rated themselves between 5% and 26% higher than those from other cities surveyed.

A comparative analysis of our online quantitative research of 4,147 consumers across eight markets allowed us to forge a deeper insight into the self-esteem of a city's residents. By comparing the percentage of residents who gave their city a positive rating to the rating of non-residents from the other seven cities surveyed, we were able to establish a city's self-esteem rating.

The n value for each city surveyed saw a small variation (7.2%), with between 500 (minimum) and 536 (maximum) city residents responding. When expressed as a percentage, however, the variance between responses is within the accepted tolerance of data analysis. Therefore, all values shown in the City Self-Esteem section relate to those respondents who, as a percentage of the total number of respondents surveyed in that city, considered their city to rate strongly against a particular soft power attribute.

All other percentages relate to the percentage of residents that rated cities, including their own, against a particular soft power attribute.

In the context of this Report, we consider self-esteem to mean the confidence and satisfaction residents have in their city. Disparity is the percentage point difference between the perception of residents and the collective perception of non-residents against a particular soft power attribute.

CITY SELF-ESTEEM

City residents have widely differing perceptions about their own cities and the others surveyed. We saw some cities that rated themselves particularly well, whilst others were more pragmatic about their views of the place in which they lived.

We also saw big differences in the opinions of non-residents about a particular city. That meant the correlation between residents and non-residents ratings was limited, hence the interest in measuring the disparity between the two against each soft power attribute.

Overall, residents rated their own city 18 percentage points higher than non-residents. Against these same metrics, Sydney has the highest level of self-esteem (26%) whilst Seoul has the lowest (5%).

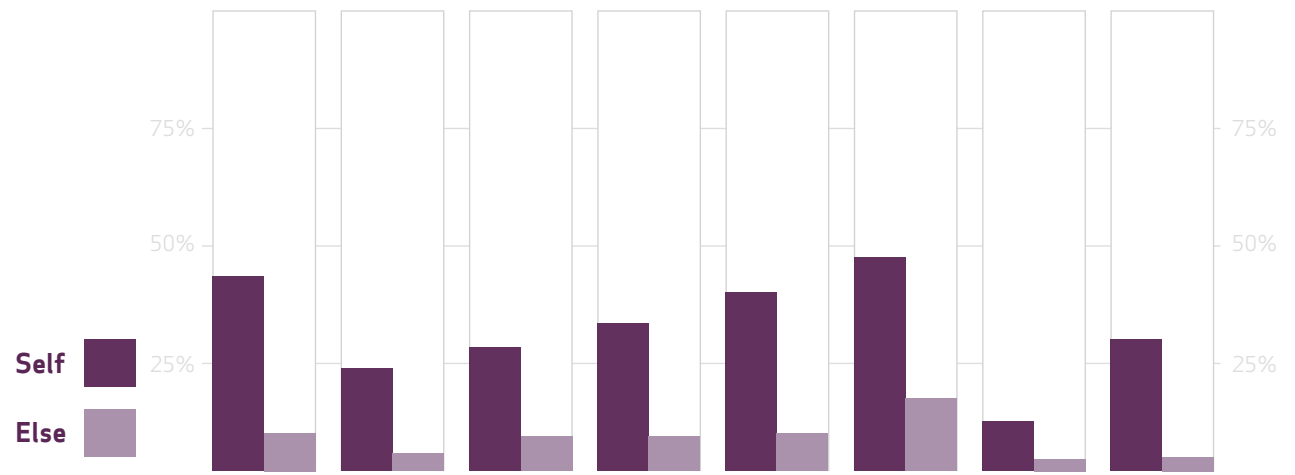
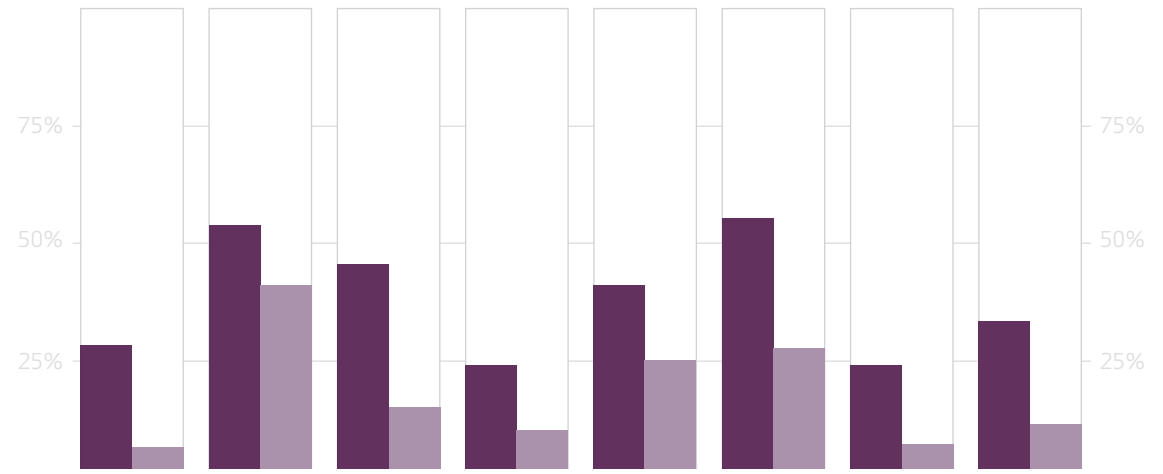


BANGKOK

Residents of Bangkok rated their city strongly as a Magnet for Tourists (51%) and for their Influence in Food, Culinary and Dining Experiences (53%). Other cities shared a similar perspective of Bangkok against Tourism (42%) but did not consider Food to be an influential soft power attribute (27%).

Elsewhere, Bangkok showed a good level of self-awareness in regards to the Standard of Living it is perceived to provide to its residents (13%), a rating that was considered an accurate representation by other respondents (4%).

Across all soft power attributes, Bangkok citizens demonstrated a greater sense of confidence and satisfaction in the soft power attributes of their city than that shared by those outside. With a self-esteem disparity of 22 percentage points, the city rated itself slightly higher than the overall average of all cities across the Report.



Self (Dark Purple)
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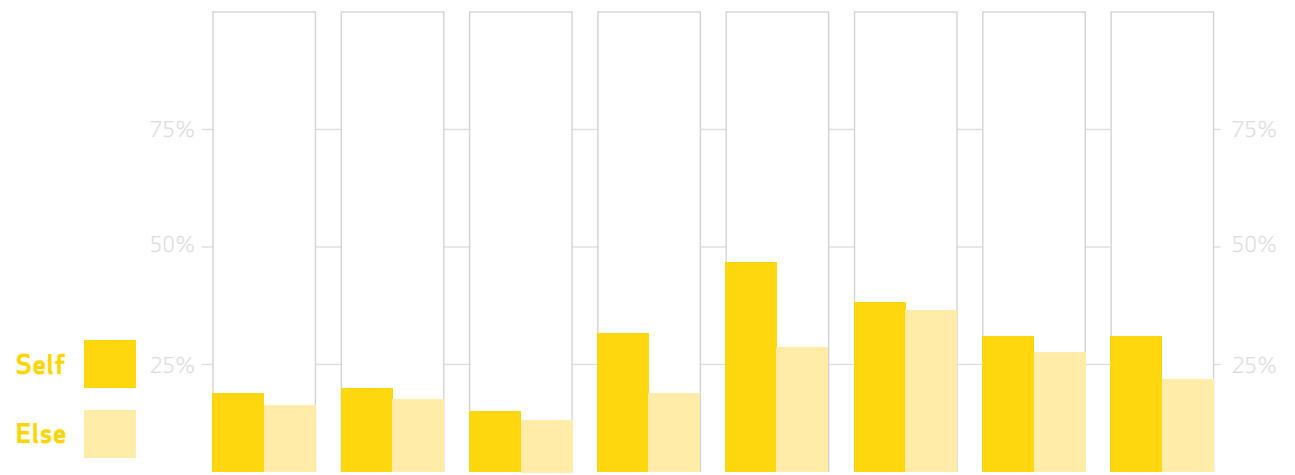
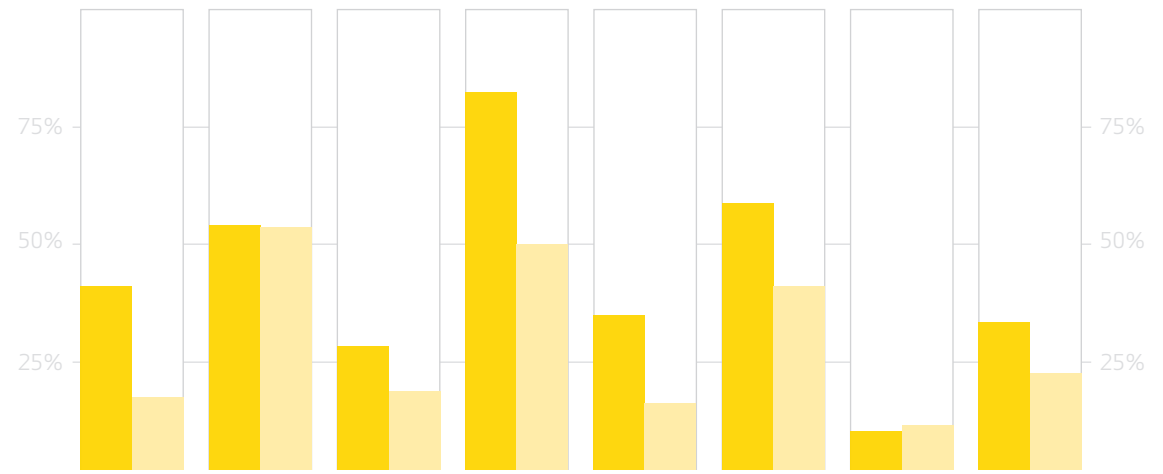


HONG KONG

Residents of Hong Kong were consistent in their view of the city as an Important Financial Centre (83%) and non-residents broadly agreed (50%). City residents were also confident about their Influence in Food, Culinary and Dining Experiences (59%), and whilst there was a disparity between that and the views of other cities (42%), that percentage number would have been considerably higher if Bangkok had not provided such a low rating (27%).

Elsewhere, the city showed reasonable signs of modesty, with four other cities rating it more favourably as an Innovator in Retail Stores and Neighbourhoods than its own residents of whom only 38% rated it. There was a similar story in its rating of its Music Scene (30%), Sports and Leisure Infrastructure (15%) and Innovative Approach to Sustainability and the Environment (12%), with three or more cities giving it the same or a higher rating than Hong Kong residents. It was the opinions of those from Shanghai that were most notable, however. With the exception of only four of our 16 reviewed soft power attributes, Shanghai residents rated Hong Kong higher than those who live in the city.

Despite its modesty in a number of areas, Hong Kong showed a self-esteem disparity of 22 percentage points against other cities reviewed across all soft power attributes.



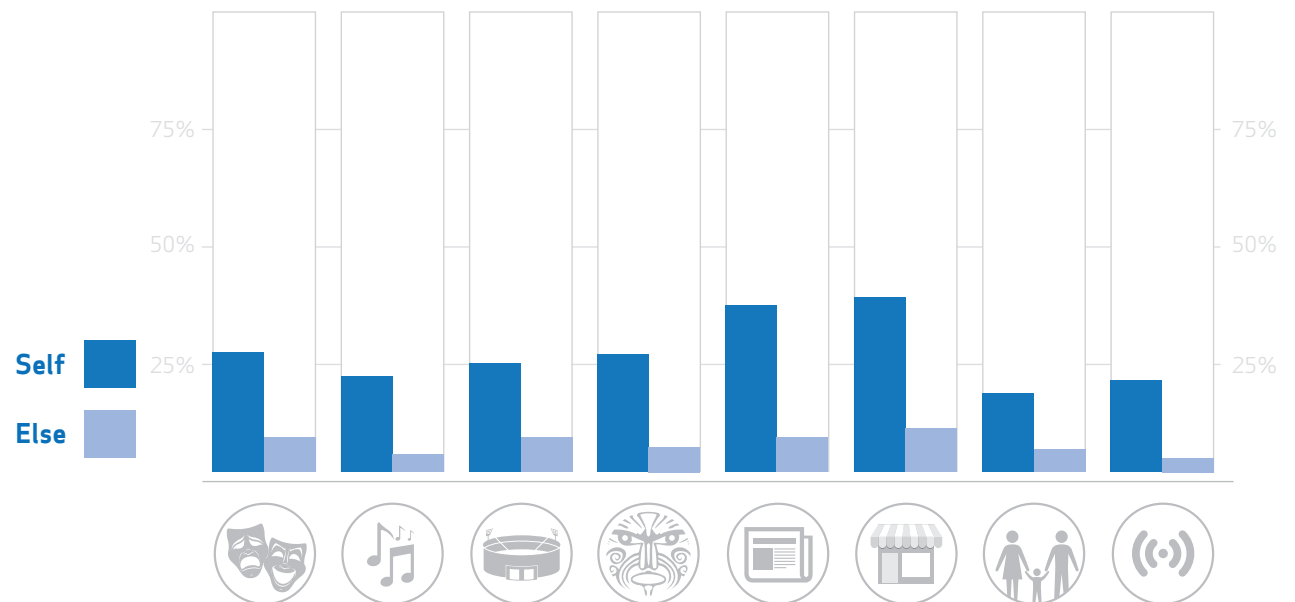
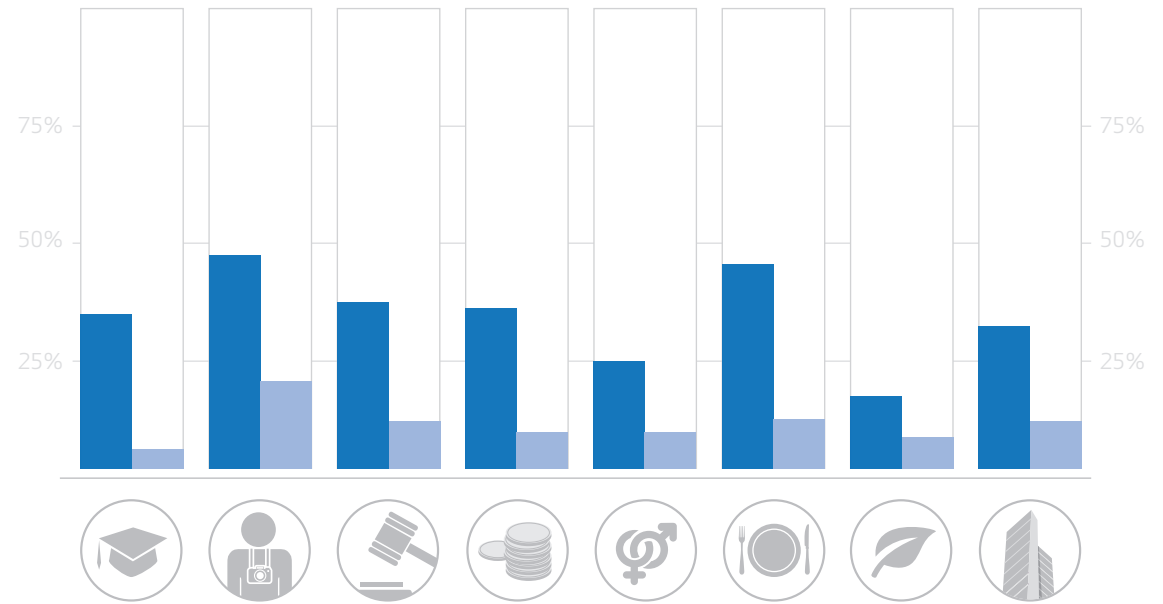
KUALA LUMPUR

The residents of Kuala Lumpur were the only group where less than 50% of respondents rated any of their soft power attributes favourably. This suggests an awareness of the current lower influence the city has, when compared to others surveyed in the region.

As in Bangkok, Kuala Lumpur's residents consider their position as a Magnet for Tourists (49%) to be their strongest perceived soft power attribute. Their influence in Food, Culinary and Dining Experiences came a close second (46%). We also see a growing appreciation of the innovation shown in their Retail Stores and Neighbourhoods (38%) as well as their place as a Centre for Academic Research and Universities (35%).

However, despite tendering a realistic rating, respondents still fell short of reflecting the views of those who live outside the city. Non-residents gave Kuala Lumpur an aggregated rating of 21% as a Magnet for Tourists and a rating of 12% for their Influence in Food (the most significant difference in self-esteem against that particular attribute).

Across all soft power attributes, Kuala Lumpur showed a self-esteem disparity of 22% points, placing it on a parallel with Bangkok and Hong Kong in our Report.



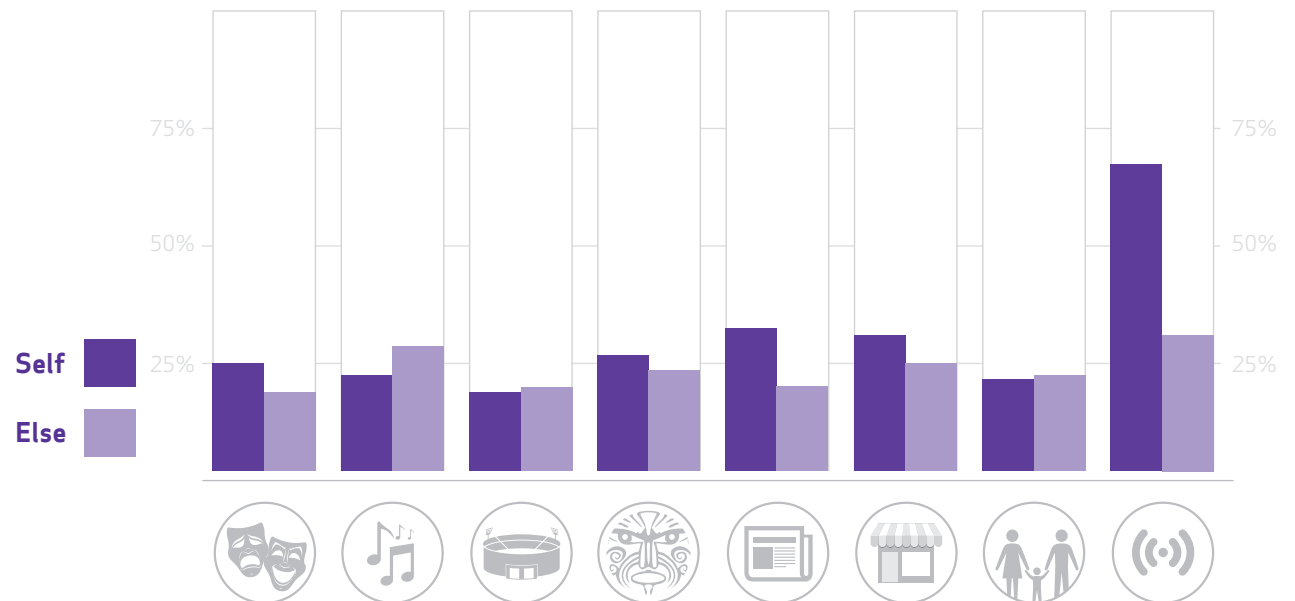
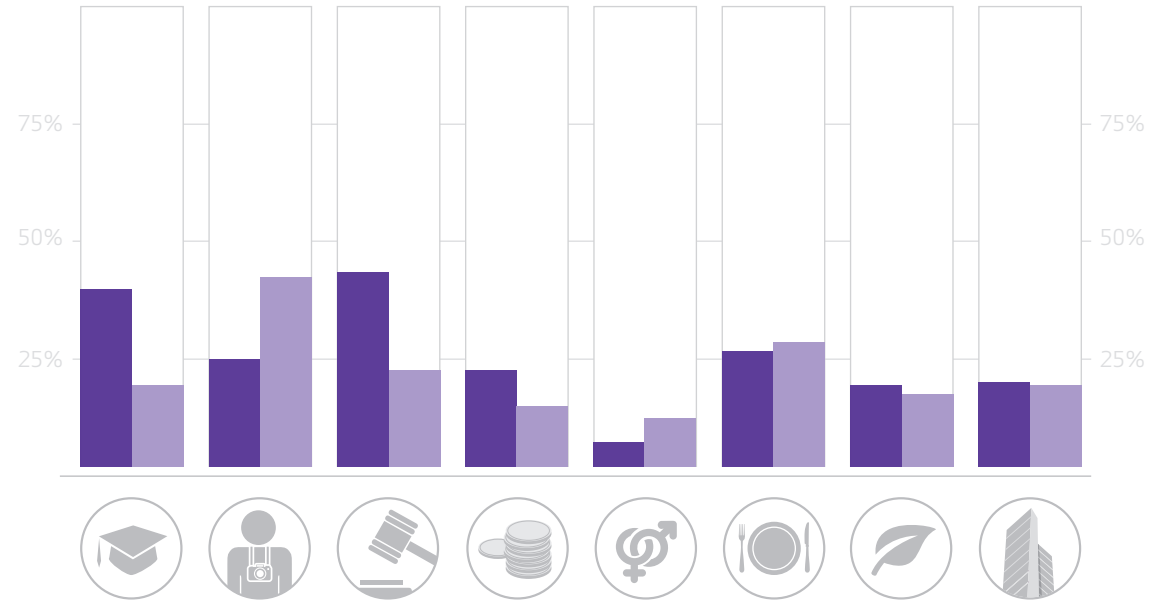
SEOUL

The residents of Seoul proved themselves to be the most modest and self-deprecating of citizens with a strong awareness of the level (and limits) of their city's influence overseas.

More than half the cities surveyed rated Seoul more highly than the city's own residents in areas, including Tourism, Food and Dining, Music Scene, Sport and Leisure Infrastructure, Standard of Living and, significantly, as a City they Desire to Imitate. Only Sydney and Tokyo residents gave Seoul a consistently low rating against all soft power attributes. When measured against the combined response of residents from Bangkok, Hong Kong, Kuala Lumpur, Shanghai and Singapore however, Seoul has the equivalent of a zero self-esteem disparity (-0.3%).

Elsewhere, Seoul residents rated their Trend Setting in Social Media and Technology (66%) well and their place as a Centre for Academic Research and Universities (40%) well. Non-residents were less convinced, rating the city's influence against those two soft power attributes as 31% and 23%, respectively.

Across all soft power attributes, Seoul showed a self-esteem disparity of 5 percentage points, making it the most self-aware city surveyed.

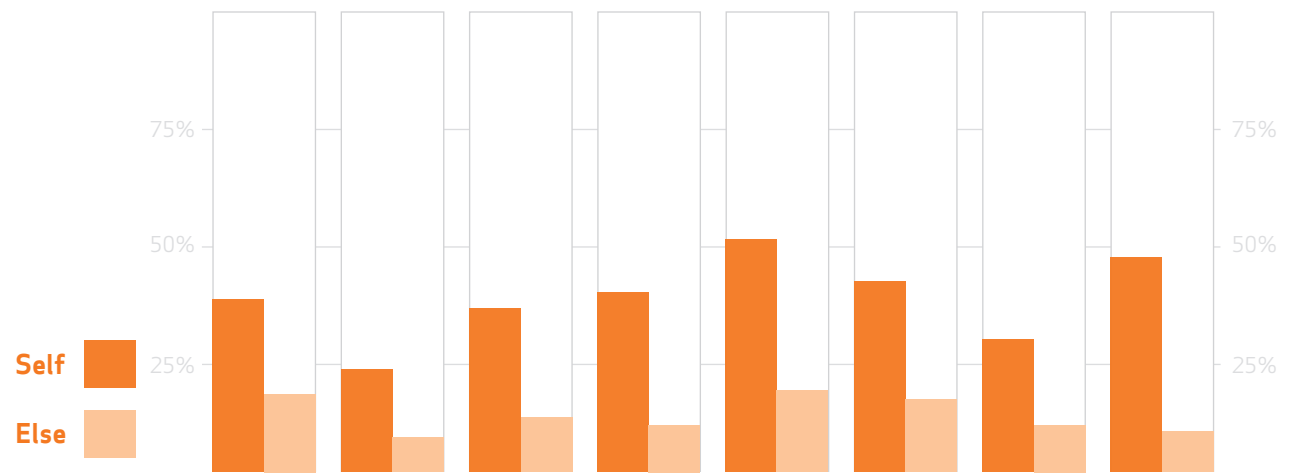
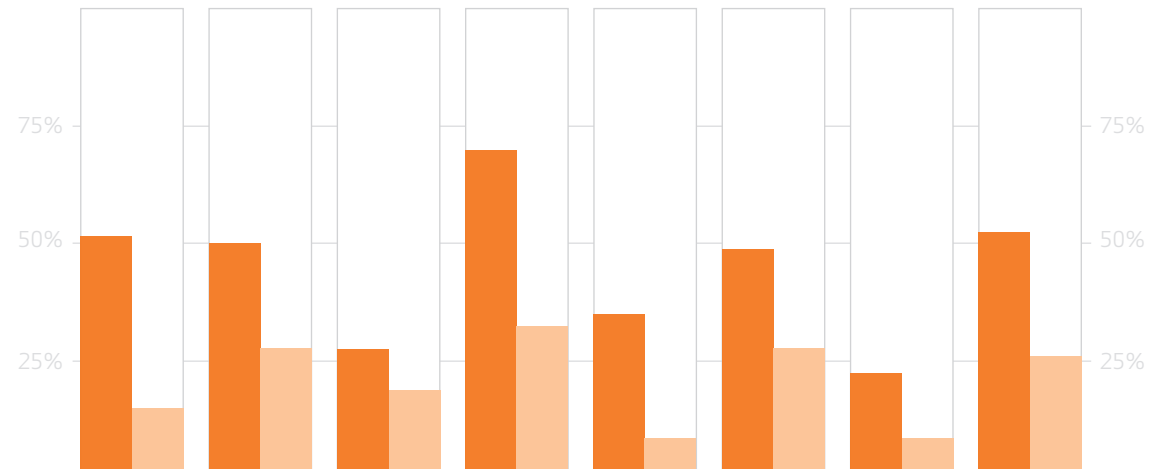


SHANGHAI

The residents of Shanghai have a high regard for their city's soft power attributes. They consider themselves a particularly Important Financial Centre (70%), well recognised for Contemporary Architecture and Design (53%) and a Centre for Academic Research and Universities (51%). Non-residents are less convinced. Against the same attributes, they rate Shanghai at 32%, 25% and 15%, respectively, all with significant disparities of self-esteem.

We saw high levels of disparity in other areas too. Shanghai residents have a positive opinion of the city's role in Setting Trends in Social Media and Digital Technology (48%), a disparity of 36 percentage points when compared to the views of other cities surveyed; and consider themselves cities that other cities would most like to imitate (39%), whilst only 10% of non-residents agreed—a disparity of 28 percentage points. Elsewhere, Shanghai residents did not rate well their Music Scene (24%) or Innovative Approach to Sustainability and the Environment (23%), although their perception of those two soft power attributes remained higher than non-residents who rated them at 9% and 8%, respectively.

Shanghai residents demonstrated a high level of civic patriotism. Across all soft power attributes, the city showed a self-esteem disparity of 25 percentage points against the perception of other cities surveyed.



Self  
Else

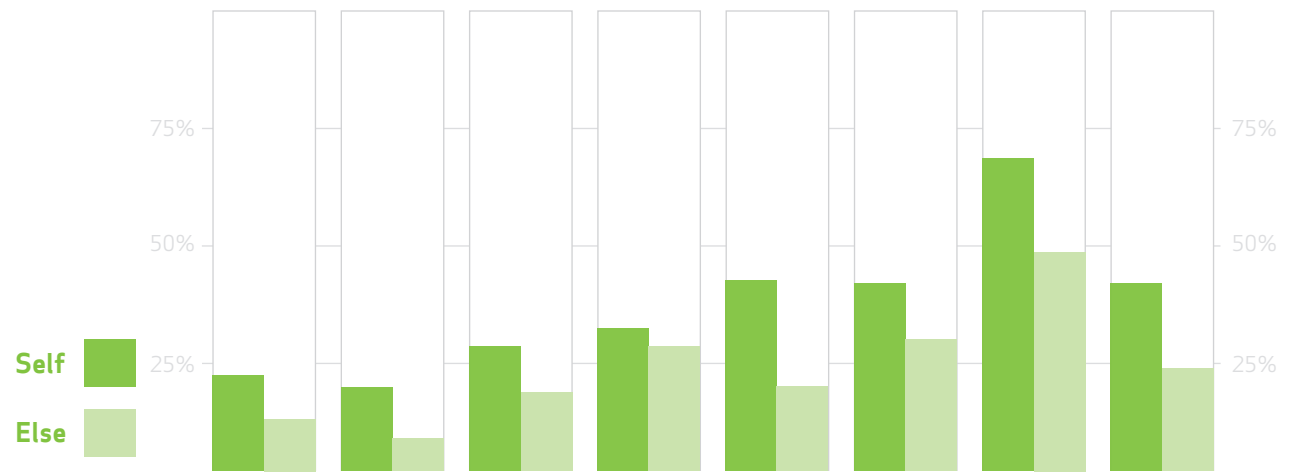
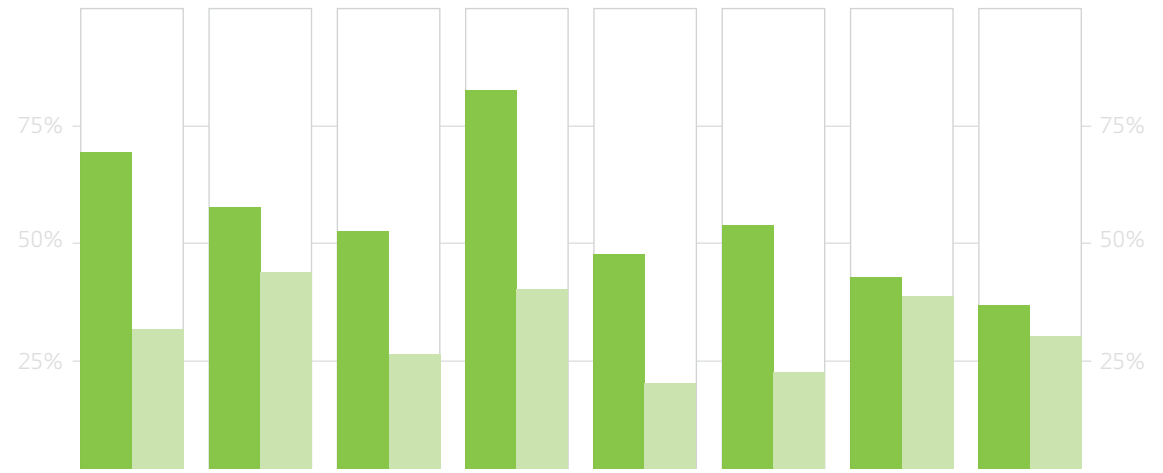


SINGAPORE

As South East Asia's primary commercial hub, it was little surprise that residents of Singapore rated their city as an Important Financial Centre (78%), something that was broadly recognised by other cities (40%). The city also considered itself to be Centre for Academic Research and Universities (69%) and to offer its residents a Particularly High Standard of Living (69%). Non-residents were generally in agreement on their perceptions of the city's Standard of Living (48%) but less so on the prowess of its educational institutions (31%).

Singapore residents were less confident about the city's recognition as a place for Contemporary Architecture and Design (37%), when compared with other cities, resulting in a relatively small self-esteem disparity of 7 percentage points. Elsewhere, the city was least confident about the soft power influence of its Music Scene (16%), an opinion that was shared by all the other cities surveyed (9%).

Across all soft power attributes, Singapore showed a self-esteem disparity of 18 percentage points, the average for the eight cities surveyed.



Self
Else



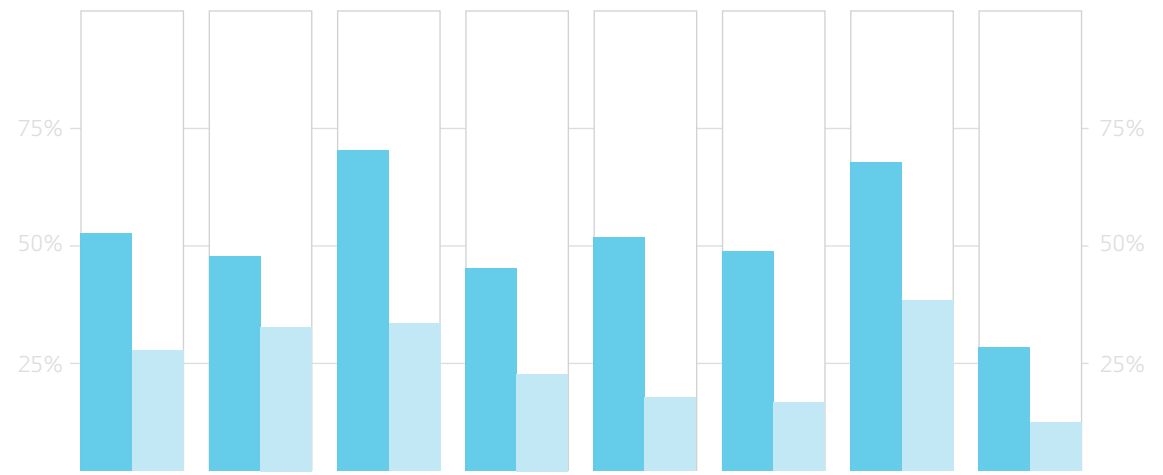
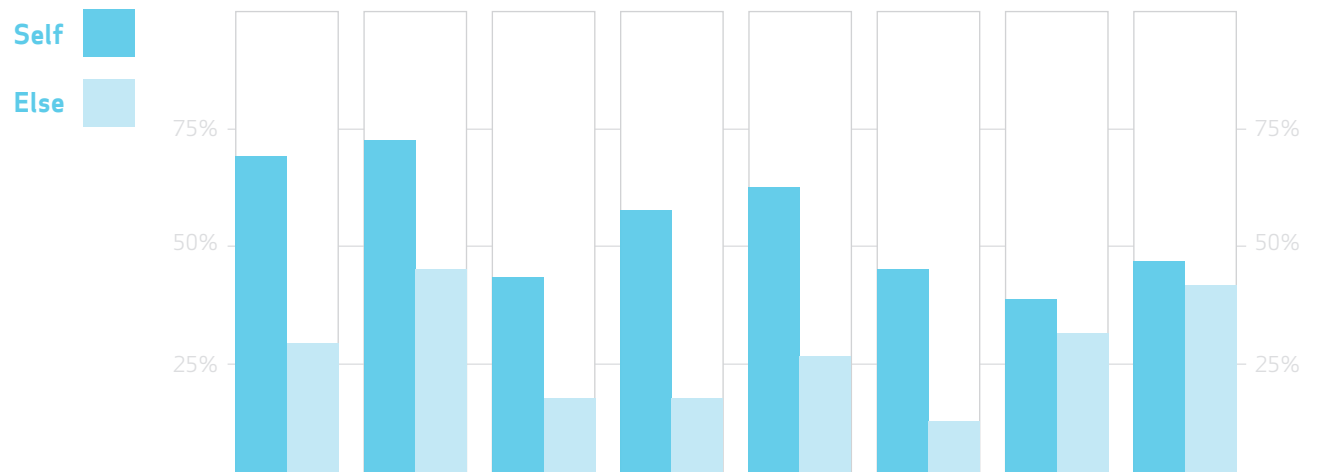
SYDNEY

With the exception of Tokyo, residents of Sydney rated the influence of its soft power attributes more highly than any other city surveyed. Others in the region were less convinced and we saw a correspondingly high self-esteem disparity (26%). Sydneysiders see their city as a Magnet for Tourism (71%), recognise its Sport and Leisure Infrastructure (70%), believe it to offer a Particularly High Standard of Living (69%) and consider it a Centre for Academic Research and Universities (68%).

Despite the disparity between perceptions against most metrics, there were a number of areas where non-residents acknowledged Sydney's strengths against specific soft power attributes, most notably Tourism (45%), Sport and Leisure Infrastructure (36%), Music Scene (33%) and Gender Tolerance (27%).

When compared to non-resident responses, Sydney residents gave their city a higher score against every soft power attribute with the exception of Contemporary Architecture and Design (Shanghai residents 48% vs. 47%), Music Scene (Seoul residents 50% vs. 47%) and an Innovative Approach to Sustainability and the Environment (Seoul residents 42% vs. 38%). Elsewhere, Sydney residents were least confident about their city's influence as a Trendsetter in Social Media and Digital Technology (27%).

Across all soft power attributes, Sydney showed a self-esteem disparity of 26 percentage points, making it the least self-aware city surveyed.



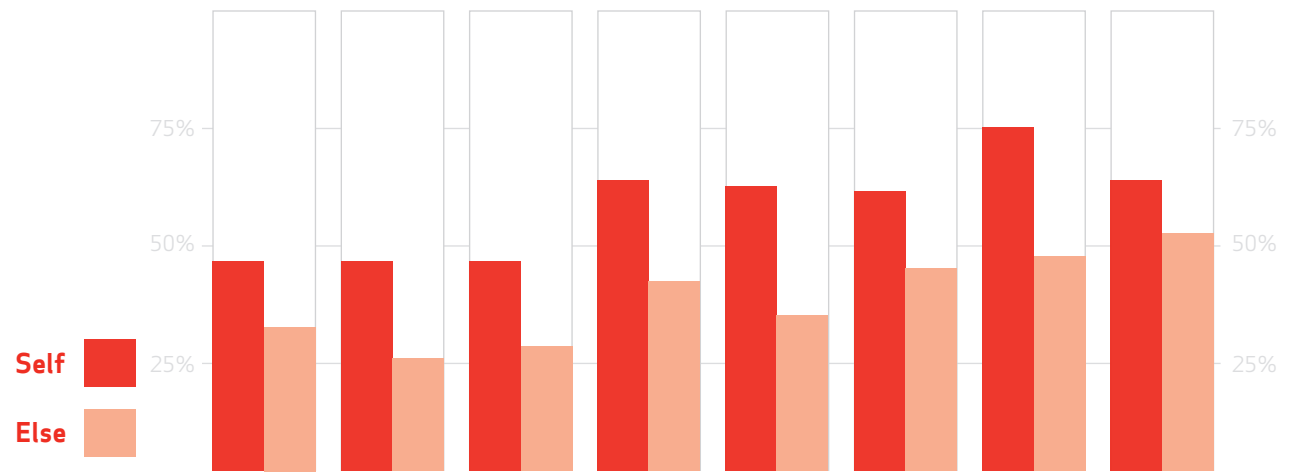
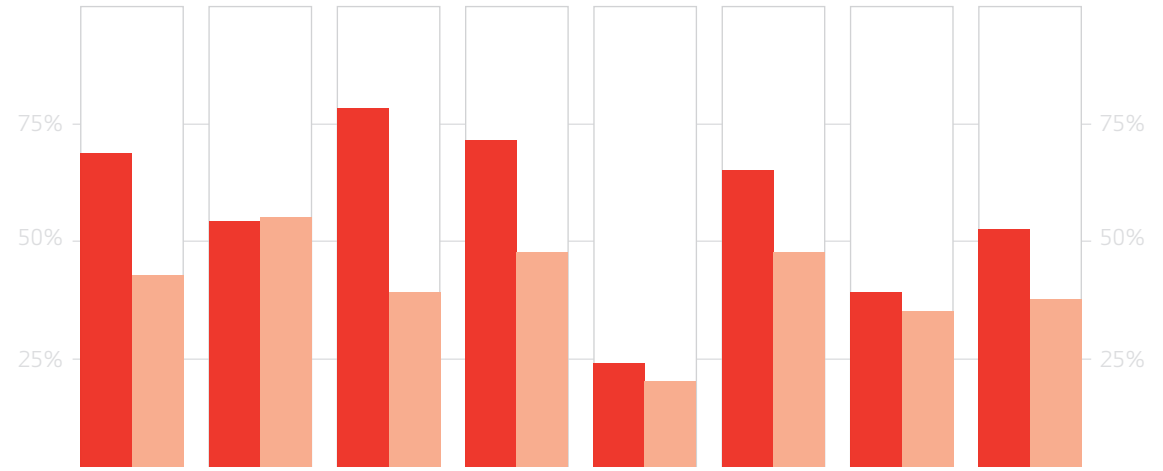
TOKYO

Residents of Tokyo rated the combined influence of its soft power attributes more highly than any other city surveyed. The primary difference between the city and Sydney was that most non-residents agreed, meaning a smaller self-esteem disparity than all other cities with the exception of Seoul.

The areas where the city rated itself most highly reflect the level of perceived sophistication in Tokyo as a place to live and work. Residents consider their home as offering a Particularly High Standard of Living (75%), being an Important Financial Centre (71%), a Centre for Academic Research and Universities (68%) and Influential in Food, Culinary and Dining Experiences (65%). Non-residents are less convinced but still rate Tokyo well in each of the four areas: 47%, 46%, 42% and 47%, respectively.

Tokyo's most significant self-esteem disparity is as a Centre for Political Decision-Making: 77% of residents responded favourably whilst only 38% of non-residents agreed—a disparity of 39%.

Across all soft power attributes, Tokyo showed a self-esteem disparity of 17 percentage points, making it the second most self-aware city surveyed.



Self  



CITY SELF-ESTEEM UNCOVERED

There are a number of reasons why the residents of one city have a higher level of self-esteem than another. Understanding those reasons presents the public and private sectors with the potential to harness local advocacy to their advantage whilst fostering and nurturing greater confidence elsewhere.

Pride is the common thread amongst the residents of the eight cities surveyed. When reviewing their response to a combination of the 16 soft power attributes, the residents of every city rated their home as more influential than the other cities surveyed. When effectively harnessed by civic leaders and brands, the impact of this level of citizen advocacy can be profound. We believe that continued investment and promotion of urban spaces plays an important part in this, as does the city undertaking unique and distinguishing initiatives that elevate internal and external interest. The sense of discovery plays a role in this, particularly where cities focus on the delivery of an experience.

Proximity matters too. The complexity and nuances of city life mean that visibility can be challenging for non-residents, whereas those that call a particular city home have the opportunity to witness the many facets and soft power attributes it has to offer. Residents also have a greater sense of city identity, forging their perceptions around the regularity of their personal interaction with the city.

Of course a greater disparity of self-esteem is not solely attributable to the confidence a city's residents have about themselves. It also relates to the views of non-residents. If a city is going to attract as well as retain talent, it needs to project the relevance of its soft power attributes both internally and externally. Our Report suggests that some cities are doing that better than others.

City self-esteem says as much about an individual's choices as it does the city itself. The population shift in cities has, for the

most part, been a result of people seeing better opportunity for themselves and their families and some expectation of creating a better life. That suggests an unwillingness to be overly critical of their environment on account of their own decision to live there and, to some degree, the effort they put in to drawing the best from the city in which they live.

Finally, we consider it relevant that the two cities (Seoul and Tokyo) considered to be the most conservative and perhaps most aware of their heritage have the lowest disparity of self-esteem. Moreover, these two cities have seen limited cultural integration historically and lack the level of diversity seen in other cities. This may contribute to a greater sense of identity by both residents and non-residents. One of the outcomes is the ability of both Seoul and Tokyo to project a heightened level of authenticity. It may be that authenticity has a profoundly important place in the soft power influence of any city.

'People may come back to the same place because they like it, but that place needs to offer a new and unique experience each time they do. The truly influential cities have always evolved.'

Hirofumi Nomoto, Tokyu Corporation



A FINAL THOUGHT

The reputation of a city directly influences its ability to attract talent, secure investment and create an environment that fosters innovation and prosperity. It is a challenge that demands a clear vision and the proactive management of its soft power attributes.

The ability to promote diversity is central to that. Throughout our research we heard a chorus of opinion about the role diversity plays in delivering a vibrant, dynamic and exciting city experience. Diverse talent inspires a new breed of creative thinking and innovation; diverse neighbourhoods bring a richer and multidimensional perspective to a city; and a diverse environment gives people the opportunity to personalise their experience on their own terms. Projecting diversity, and the sum of its parts, helps cities engage more effectively with its stakeholders.

Delivering authentic experiences matters too. Social media amplifies the impact of a disconnect between perception and reality and city influence can be hampered if expectations are not met. Highlighting attributes where perception lags reality can therefore lead to a greater sense of discovery.

Cities that are more forthright in their approach to the less obvious attributes of urban environments can provoke a level of surprise and interest that makes them perceived as more interesting places to be.

Projecting the soft power attributes of cities does not rest solely in the public sector. The roles that corporate and consumer brands play in elevating the social fabric of a city has the potential to go beyond high-profile sponsored events and community contribution. Understanding where perceptions of a city's attributes are weak and working with civic leaders to develop appropriate brand-related campaigns around those attributes can be mutually beneficial.

At Weber Shandwick, we believe that the shift in focus towards the influence of a city's soft power attributes in Asia Pacific will accelerate. Cities that invest in better understanding those attributes will be best placed to develop smart, tailored engagement strategies that ultimately advance their reputation in the region, giving them stronger talent assets and greater ownership of their own future.

'Authenticity has become the primary driver of preference as economies mature.'

*Gilmore and Pine,
Authenticity: What Consumers
Really Want, 2007*



‘Smart Nations are moving away from nurturing people who merely strive to master technical competency and, instead, are developing individuals who can also see trending problems of the future and then apply creativity to solve them while attaining technical mastery as well.’

*Eugene Tan, Associate Professor
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