

# Brand Analysis

### Greater Copenhagen brand value



## Content

	3
SUMMARY	4
Final indicators	

### SECTION 1: Interaction with brand content and values amongst target groups \_\_\_\_\_ 6

•	Methodology	7
•	International Awareness	9
•	Website Interactions	20
•	Brand Message Interaction	24
	Target Croup Specific Drand Interactions	~1

Target Group Specific Brand Interactions \_\_\_\_\_ 31

SECTION 2; The use of the term "Greater Copenhagen": Local anchoring \_\_\_\_\_ 47

## Introduction

- This analysis is conducted by Copenhagen Capacity and Business Region Skåne on the request of The Greater Copenhagen & Skåne Committee. The **main purpose** is to present indicators for the status of the Greater Copenhagen brand building process.
- The branding strategy for Greater Copenhagen is based on creating awareness and visibility in selected markets and target groups abroad with the **aim of attracting foreign companies**, **investment and highly skilled labor** to the regions.
- The main focus of the efforts in Copenhagen Capacity and Invest in Skåne (part of Business Region Skåne) has been **digital marketing campaigns and events** around the world. The purpose of these is to create exponentially greater visibility around Zealand and Skåne and thus to **attract customers** in the chosen target groups on a larger scale, easier and cheaper.
- The funds granted to the brand are earmarked for the above. There have been no general branding or awareness campaigns. But, Greater Copenhagen has continuously been highlighted in content marketing, PR, and videos such as the Greater Copenhagen brand video and the lifestyle video called "Cycling Without Age" in collaboration with Great Big Stories funded by Business Region Skåne and Copenhagen Capacity.

 In all aspects of the marketing and branding there have been elements of **emotional selling points** based on the identity of the brand, but the main effort has been on marketing the concrete "value propositions" the regions have to offer.

### The analysis

- SECTION 1: Interaction with brand content and values amongst target groups.
- SECTION 2: The use of the term "Greater Copenhagen": Local anchoring.
- SECTION 3; "Copenhagen" general reputation compared to the reputation of Denmark and Sweden.

## SUMMARY

- This section summarizes the brand analysis
- We have investigated **available digital data**. The main part of the analysis is based on **actual behaviour** (section 1 & 2) rather than for instance survey. In section 3, third party survey data on city brands is used.
- The overall results are positive. Looking at the defined specific target groups in Facebook/Instagram, there was an audience of 9,4 million unique people. Across all campaigns 68% has interacted with the brand. There has been around 111 million impressions (displays). There has been actual interaction with some 6,4 million people, and more than 99% of reactions are distinctly positive.
- There has been 4 million video impressions ("I am Greater Copenhagen" and more than **570.000 video views** (30+ seconds on YouTube, 3+ seconds on Facebook (channel standards)). Adding the views of the video "Wind in your hair" it sums up to 727.184.
- The video content represent these **brand values**: Cool Lifestyle, Liveability, Work-Life Balance, Happiness, Opportunity, Equality, Diversity, Sustainability, Strong Business Environment, Where Denmark Meets Sweden, Freedom, Trust, Safety, Collaboration, Community, Organised Chaos, Open Arms & Minds, Creativity and Smart Thinking.

- Amongst 6 different messages represented in banners, **"Work-life balance & Family Time"** scores best across genders. Most positive interaction with a segment is seen with "Liveability & Cool Copenhagen" amongst women.
- **10 campaigns** have been completed. Some campaigns have been focused on talents, others at businesses and some at both. There have been special campaigns for tech startups and European Medicines Agency (EMA).
- The term "Greater Copenhagen" is not likely to be widely used by 3rd parties – at least not with the type of efforts that have been possible so far. There is an increase for this search term – but just in Denmark and Sweden, illustrating that the brand is **well anchored** amongst the involved local actors. The search for this term began with the Greater Copenhagen initiative.
- The word **Copenhagen** is the central part of the brand name. Copenhagen is climbing the index of City RepTrak in 2017 and 2018. From being #9-11 2013-2016 – it is **now #2-3**. Meanwhile, Denmark has not improved and remains at the level of #7-9 amongst nations. Sweden has maintained a level of #1-3.
- <u>**Recommendations:**</u> If the funding for broader branding campaigns is raised substantially, there might be a basis for investigating changes in the brand perception with regards to for instance Copenhagen as a career destination amongst relevant target groups through a survey tool.

## Final indicators

### INTERNATIONAL AWARENESS OF GREATER COPENHAGEN

### Total international awareness

### 6.412.146

Number of people there has been actual interaction with in 2016-2018. More than 99% of reactions are distinctly positive. Looking at the defined specific target groups in Facebook/Instagram, there was an audience of 9.400.000 unique people. Across all campaigns 68% interacted with the brand.

### Total webpage visitors

**1.153.408** Total number of unique website visitors.

#### Organic awareness

#### 2.121.177

Organic (not paid) impressions and engagement rate across all Greater Copenhagen digital channels.

### Interaction estimate for *talent* attraction 64%

Is the relative target group brand interaction estimate for all talent attraction campaigns based on 4.361.715 interactions from an estimated target group size of 6.839.703 people.

### Interaction estimate for *business* attraction $44^{\circ}$

### 44%

3

Is the relative target group brand interaction estimate for all business attraction campaigns based on 569.884 interactions from an estimated target group size of 1.301.913 people.

The above specific figures for talent and business attraction, only include targeted campaigns and not organic traffic,

### **GENERAL REPUTATION**

#### Overall global reputation rank



Copenhagen's overall global reputation rank amongst 56 cities: Copenhagen is climbing the index of City RepTrak in 2017 and 2018. From being #9-11 2013-2016, it is now #2-3.



## **SECTION 1:**

# Interaction with brand content and values amongst target groups



# Methodology

## Methodology

### Data collection

This analysis is based on data from the launch of the Greater Copenhagen digital platform in March 2015 until September 30<sup>th</sup> 2018. The data were collected using Google Analytics and the native data analysis tool of the advertising platforms of Google, Microsoft Bing, Facebook, LinkedIn and Twitter as well as the brand profile analytics tools offered in the organic management tools of the same platforms.

#### Time on website

The time spend on websites is taken from Google Analytics "Avg. time on Page" metrics, meaning that it is a measure of the average time the specific page has been open in the users' browser excluding all visitor bounces (visitors who enter the site and then leave ("bounce") rather than continuing to other pages at the same site).

#### Interaction

An interaction is defined by any type of engagement with the post on social media - including likes, comments, shares, retweets – any type of click on the content – including to the landing page, social media account or email sign-up – and video views on Facebook at least 3 seconds and at least 30 seconds or full length on YouTube.

### Unique people reached

This analysis uses the number of unique people reached from the Facebook and Instagram data. Due to the lack of cross channel data integration between the channel providers, it is not possible to determine, whether the unique persons reached across channels are identical. Facebook and Instagram take up 37% of all the impressions and 47% of all the interaction and across the campaigns they have been used with a target audience somewhat in-between narrow and broad, which gives it a good basis for providing an estimate of the average total amount of people reached across channels.

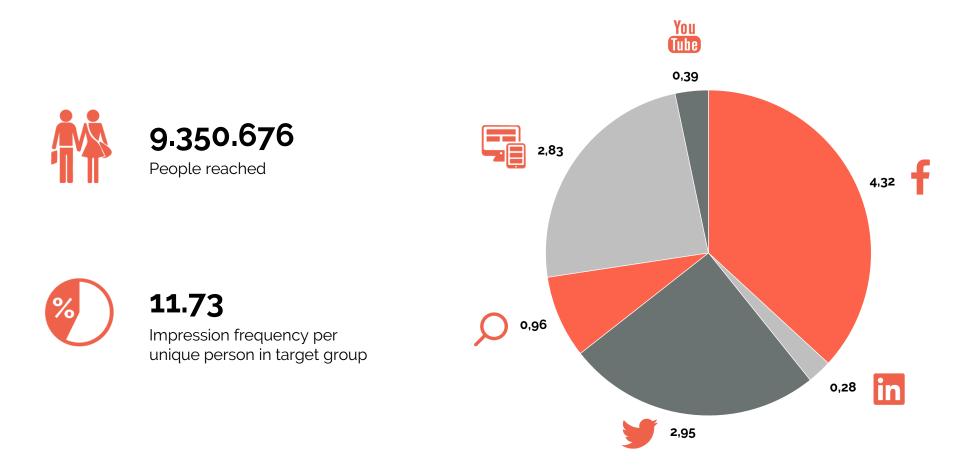
### Affinity trends

Based on a social listening study analysing mentions across all the most common social media, websites and blogs during the period from April 1<sup>st</sup> 2018 to September 30<sup>th</sup> 2018.

## International Awareness

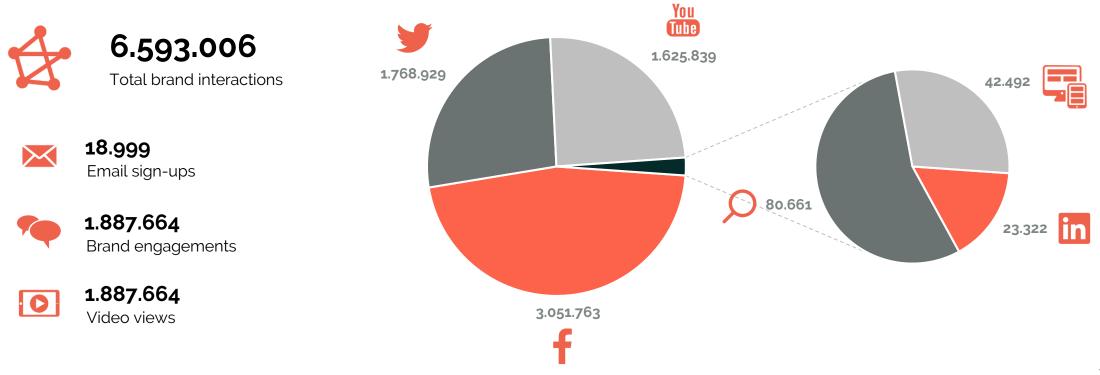
## Brand Awareness Frequency

Impression frequency relative to target group size based on actual unique persons reached in targeted digital campaigns.



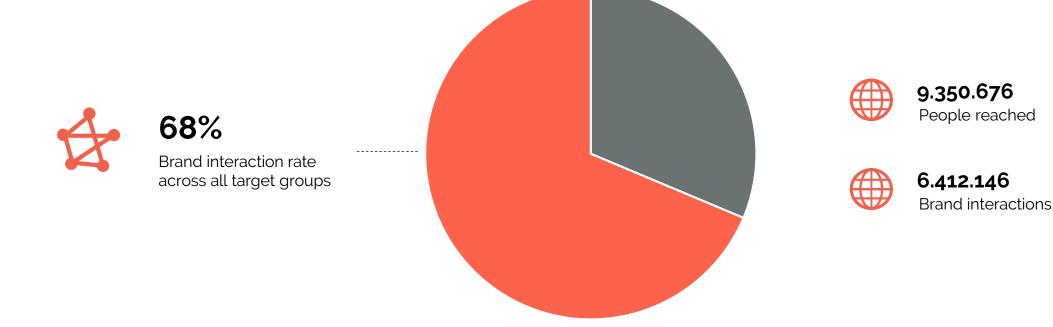
## **Brand Interactions**

Total brand interactions across paid (97% of total) and organic (3% of total) digital channels.



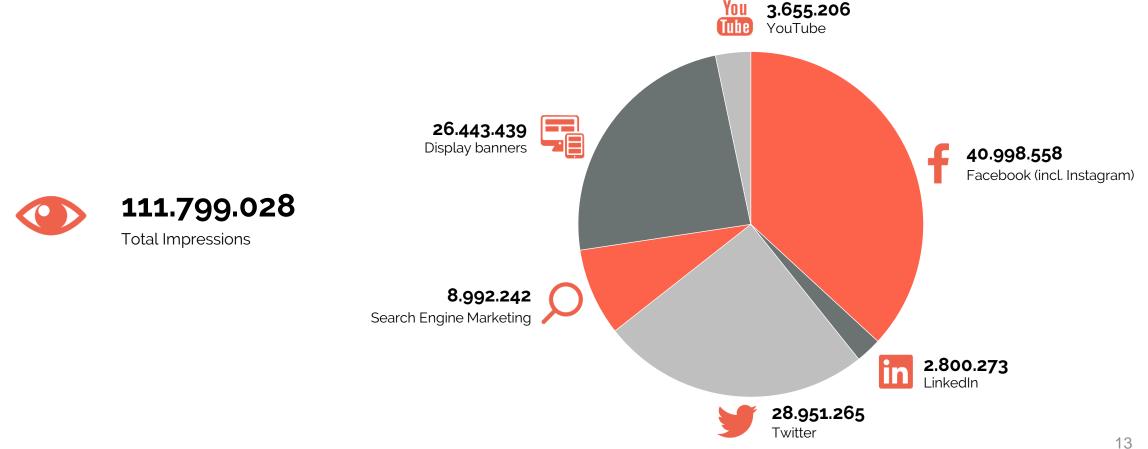
## **Brand Interactions**

Paid brand interactions relative to target group size based on actual unique persons reached in targeted digital campaigns.



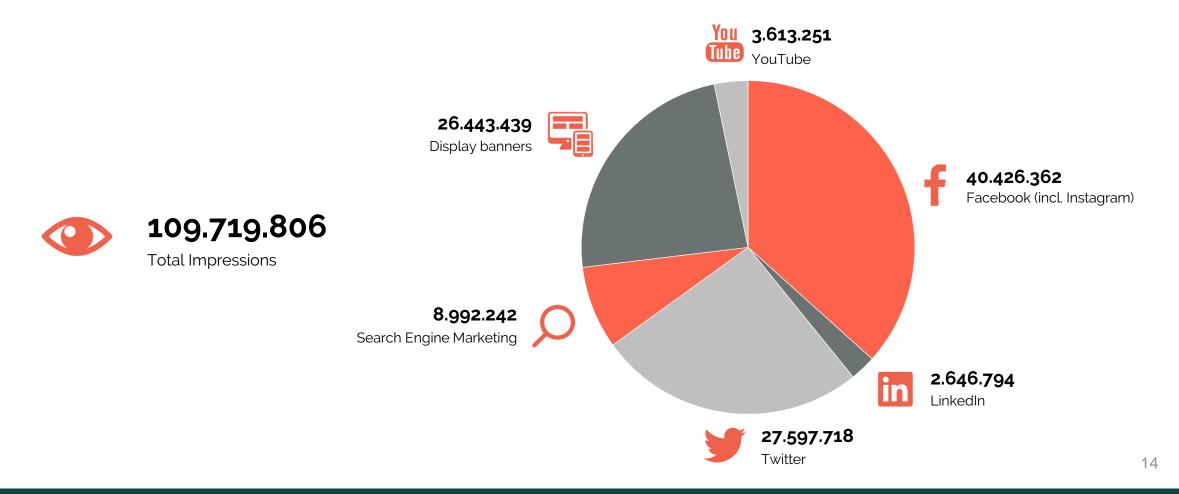
## Total International Awareness

Impressions across all international Greater Copenhagen digital channels.



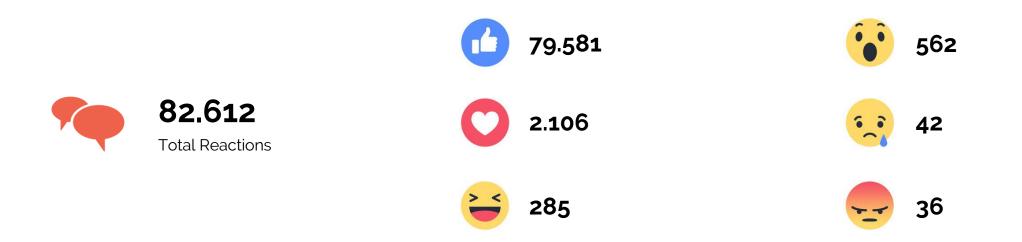
## Paid International Awareness

Paid impressions across all international Greater Copenhagen digital channels.



## Reactions to brand messages

Target groups' reactions to the paid Greater Copenhagen brand messages and content on Facebook and Instagram.

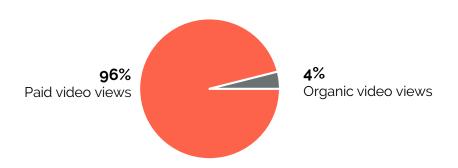


## Branding Video

The "I Am Greater Copenhagen"-video is the overall branding video based on the Greater Copenhagen core narrative created from the input from internal as well as external stakeholders to make the foundation of the Greater Copenhagen brand.



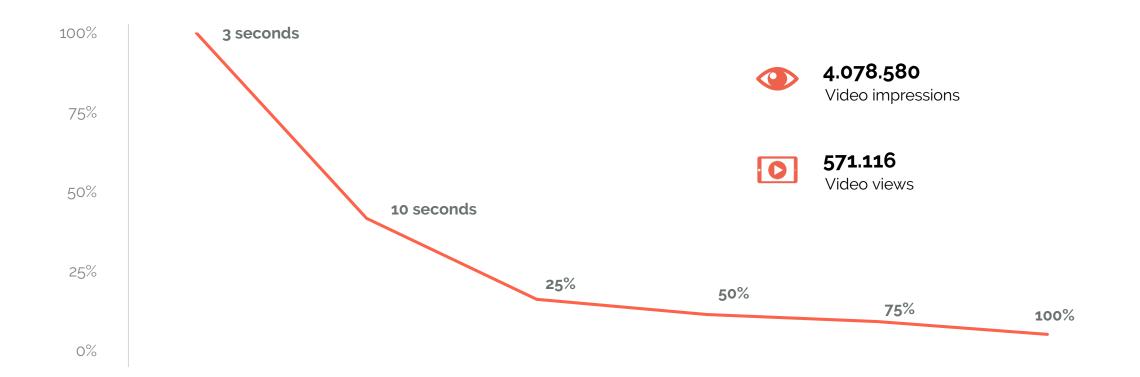




### Video brand values

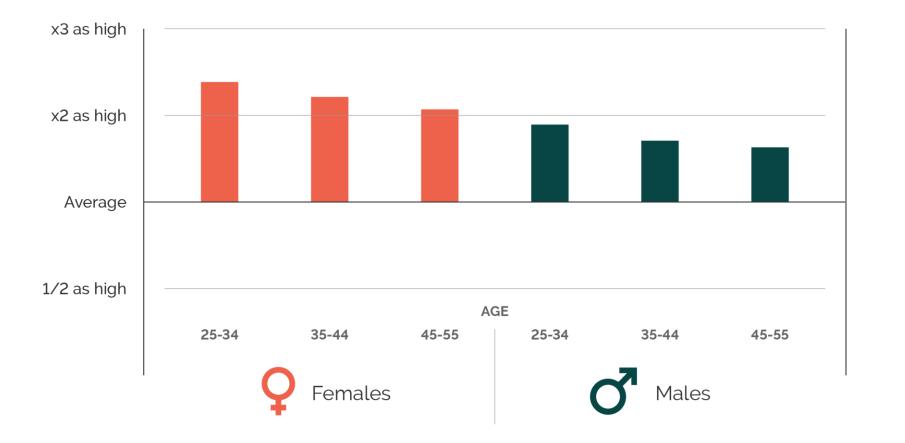
Cool Lifestyle, Liveability, Work-Life Balance, Happiness, Opportunity, Equality, Diversity, Sustainability, Strong Business Environment, Where Denmark Meets Sweden, Freedom, Trust, Safety, Collaboration, Community, Organised Chaos, Open Arms & Minds, Creativity, Smart Thinking

## Branding Video View Ratio



## Branding Video Target Group Response

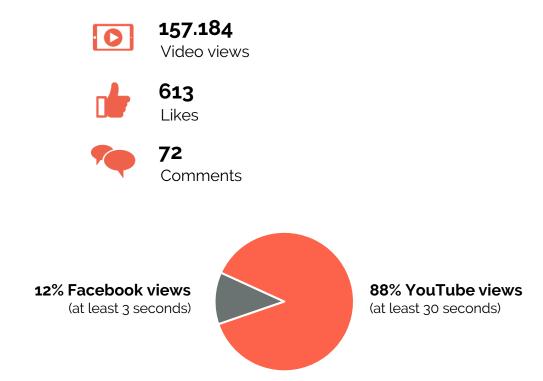
Target group segments' response to the "I am Greater Copenhagen"-video relative to their average responsiveness to other Greater Copenhagen brand content.



Based on 818.300 out of 25.814.073 total Facebook and Instagram impressions in the targeted Talent Attraction campaigns.

## "Wind in you hair" video

The "Wind in your hair" video is a branding video telling the story about Greater Copenhagen's unique biking culture. The video was made by Great Big Stories and promoted through their channels on Facebook and YouTube.





## Website Interactions

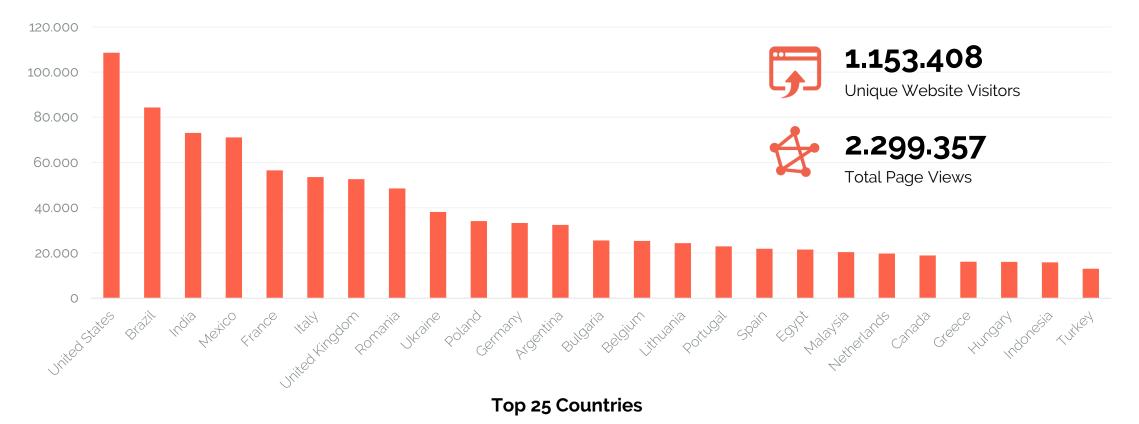
International audiences' interactions on Greater Copenhagen the online platforms located on the greatercph.com domain – including all /campaign subdomains.

All Danish and Swedish traffic is excluded.

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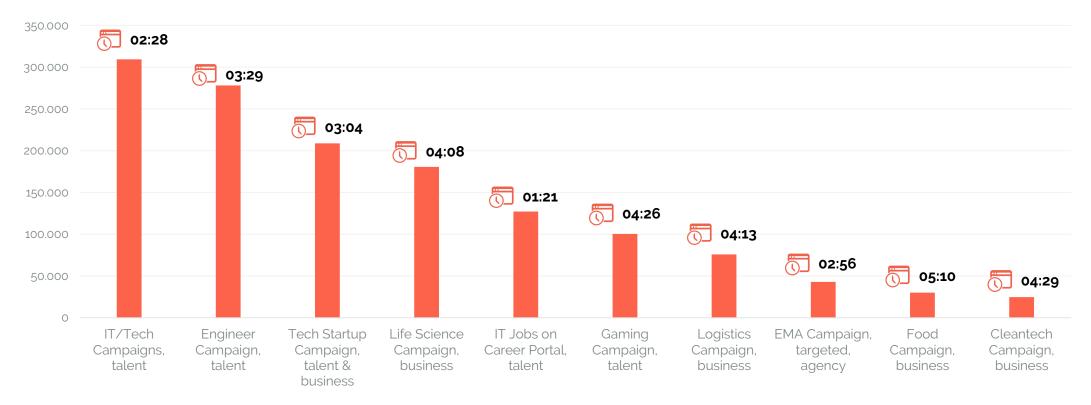
## Website Visitors – international audience

All visitors (DK+SE excluded) to the Greater Copenhagen international website and all the campaign sites and other Greater Copenhagen platforms on the <u>www.greatercph.com</u> domain.



## Website Behaviour

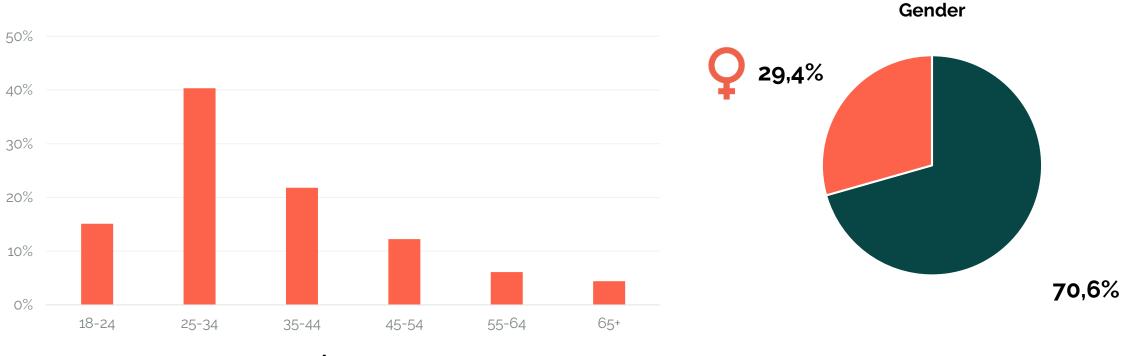
Most visited Greater Copenhagen online platforms on the <u>www.greatercph.com</u> domain (page views) and the average time spend on each site.



### **Greater Copenhagen platform**

## Website Demographics

Demographics of all international visitors to the Greater Copenhagen online platforms on the <u>www.greatercph.com</u> domain.



Age

# Brand Message Interaction

How the target group segments responded to the specific Greater Copenhagen brand messages relative to how they on average responded to the Greater Copenhagen brand messages in general.

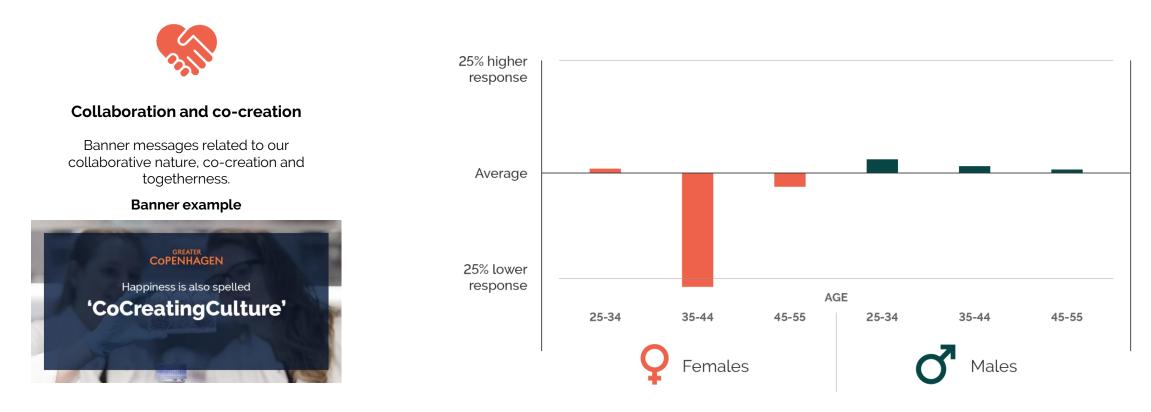
All data is from Facebook and Instagram paid advertising.

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## **Collaboration & Co-creation**

### **Brand Message Interactions - Talent**

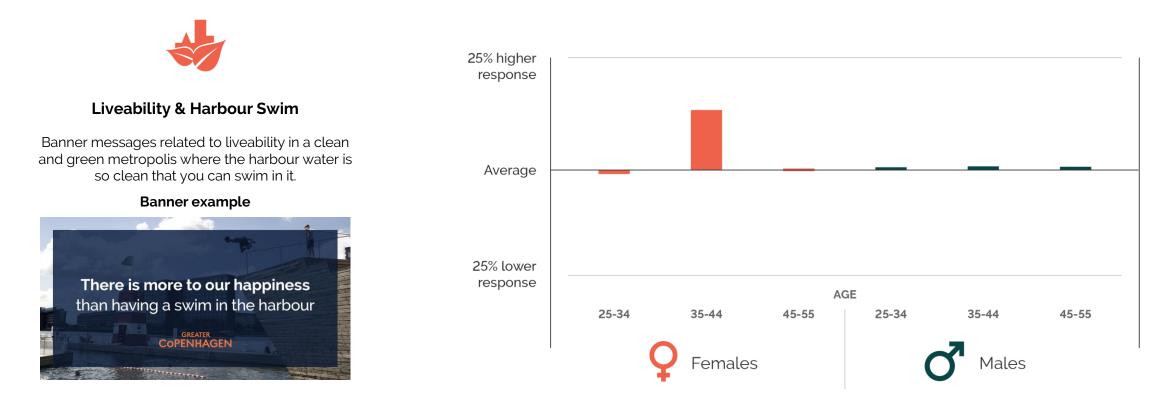
Target group segments' response to Collaboration-related banner brand message relative to their average responsiveness to other banners with Greater Copenhagen brand messages.



## Liveability & Harbour Swim

### Brand Messages Interactions - Talent

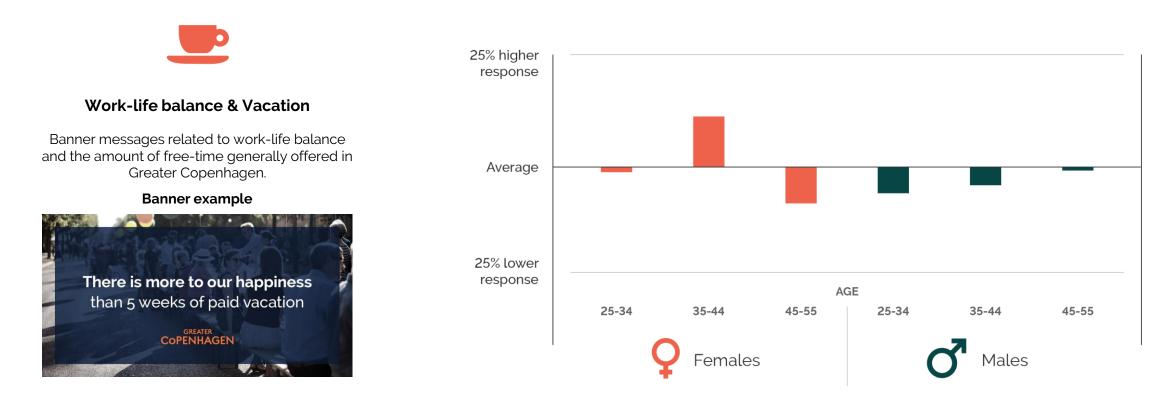
Target group segments' response to Harbour Swim-related banner brand message relative to their average responsiveness to other banners with Greater Copenhagen brand messages.



## Work-life balance & Vacation

### **Brand Messages Interactions - Talent**

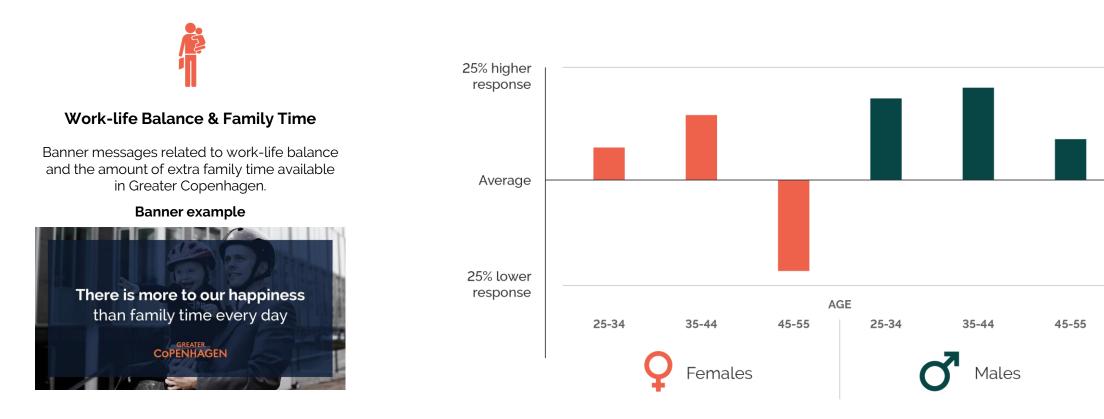
Target group segments' response to Vacation-related banner brand message relative to their average responsiveness to other banners with Greater Copenhagen brand messages.



## Work-life balance & Family Time

### **Brand Messages Interactions - Talent**

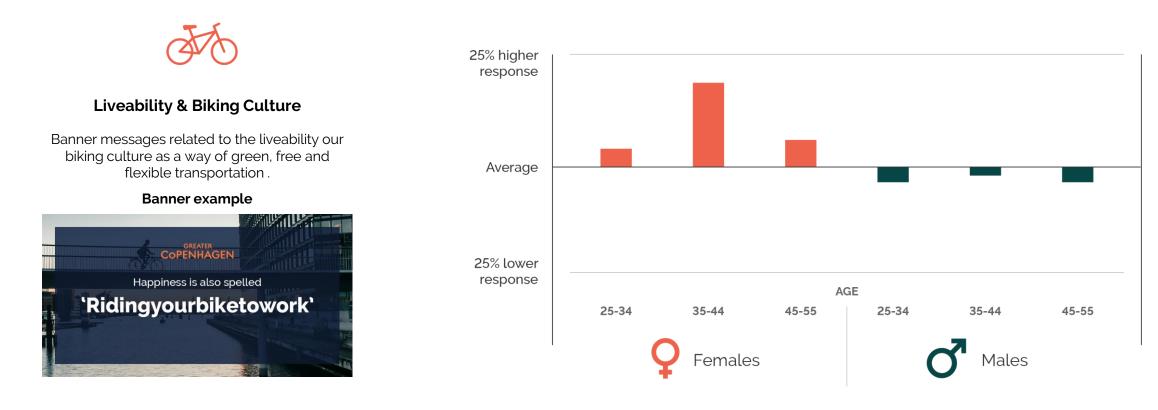
Target group segments' response to Family Time-related banner brand message relative to their average responsiveness to other banners with Greater Copenhagen brand messages.



## Liveability & Biking Culture

### Brand Messages Interactions - Talent

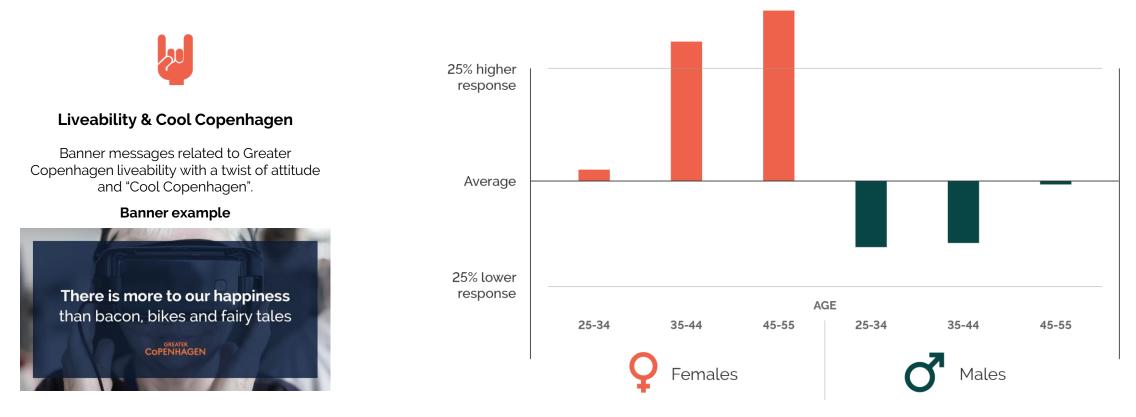
Target group segments' response to Biking Culture-related banner brand message relative to their average responsiveness to other banners with Greater Copenhagen brand messages.



## Liveability & Cool Copenhagen

### Brand Messages Interactions - Talent

Target group segments' response to Cool Copenhagen-related banner brand message relative to their average responsiveness to other banners with Greater Copenhagen brand messages.

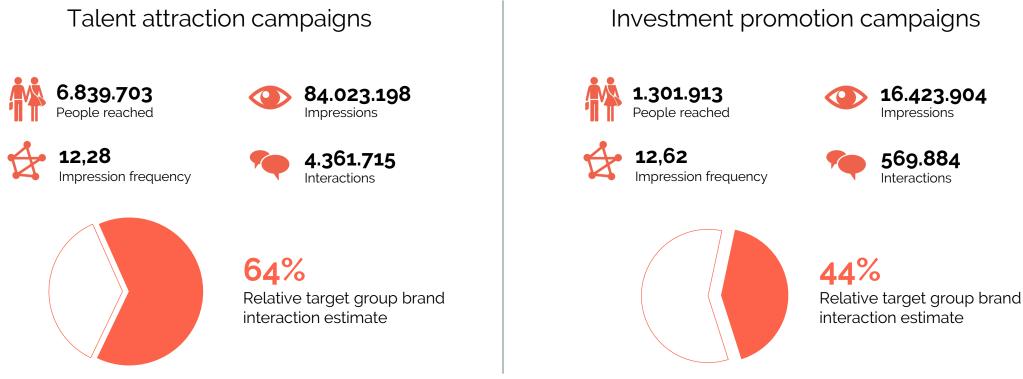


# Target Group Specific Brand Interactions

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## Total interaction across digital talent attraction and investment promotion campaigns

Total amount of awareness and brand interactions within the targeted digital campaigns promoting career and business opportunities in Greater Copenhagen accounting for target group overlap between the different campaigns.



Investment promotion campaigns

16.423.904

Impressions

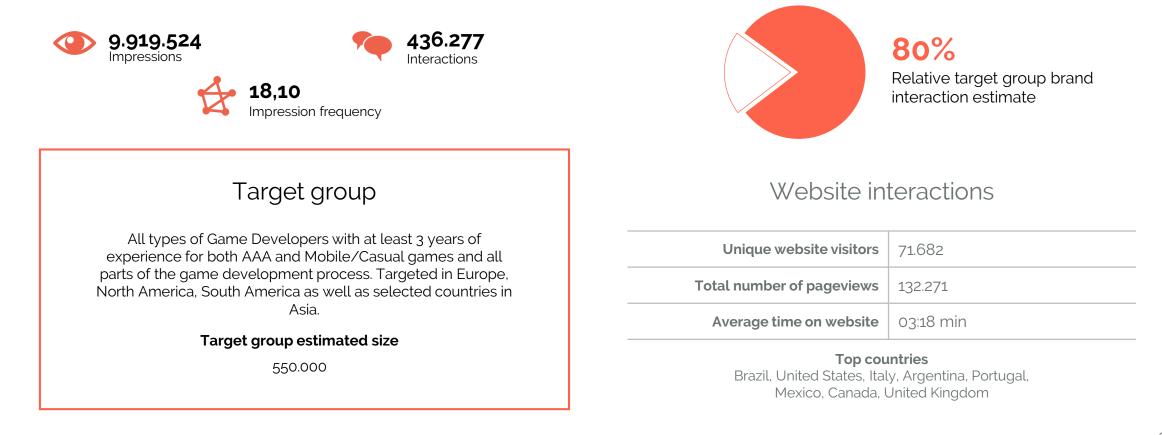
569.884

Interactions

## Gaming – Talent Attraction

### Target Group Specific Brand Interaction – Q4 2016

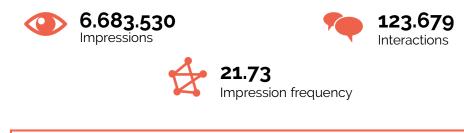
Amount of awareness and brand interactions within the targeted digital campaign promoting career opportunities in Greater Copenhagen Games Industry towards international Game Developers.



## FinTech – Investment Promotion

### Target Group Specific Brand Interaction – Q2 2017 – Q4 2017

Amount of awareness and brand interactions within the targeted digital campaign promoting FinTech business opportunities in Greater Copenhagen.



### Target group

C-levels, Business Developers, Investment Managers and Analysts within the FinTech, Banking and Financial Services industries in Europe with a special focus on London, UK.

Target group estimated size

310.000



### **40%**

Relative target group brand interaction estimate

### Website interactions

Unique website visitors	36.798
Total number of pageviews	64.783
Average time on website	02:02 min

**Top countries** United Kingdom, Germany, United States, Canada, Ireland, Netherlands

## FinTech – Talent Attraction

### Target Group Specific Brand Interaction – Q1-Q2 2018

Amount of awareness and brand interactions within the targeted digital campaign promoting FinTech career opportunities in Greater Copenhagen towards international software developers and FinTech specialists.

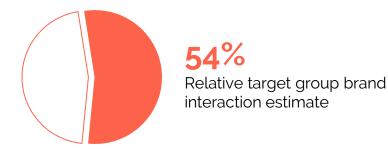




A broad range of developer types, including Frontend, Backend, DevOps, Fullstack, Testers, QAs and other IT specialists with FinTech experience with at least 3 years of experience. Targeted in Europe, North America, South America as well as selected countries in Asia.

### Target group estimated size

1.800.000



### Website interactions

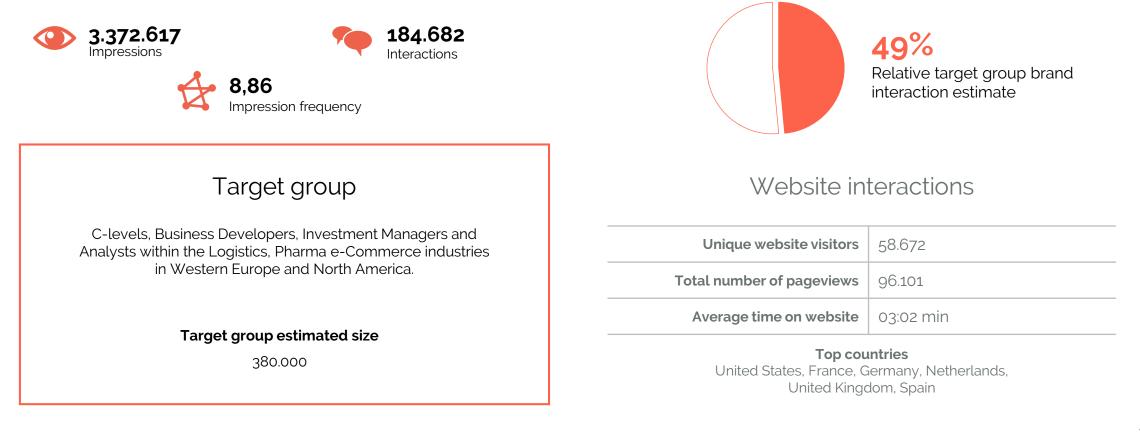
Unique website visitors	174.739
Total number of pageviews	265.087
Average time on website	01:40 min

**Top countries** Ukraine, Romania, Brazil, Bulgaria, Mexico, France

## Logistics – Investment Promotion

### Target Group Specific Brand Interaction – Q1 2017 – Q3 2018

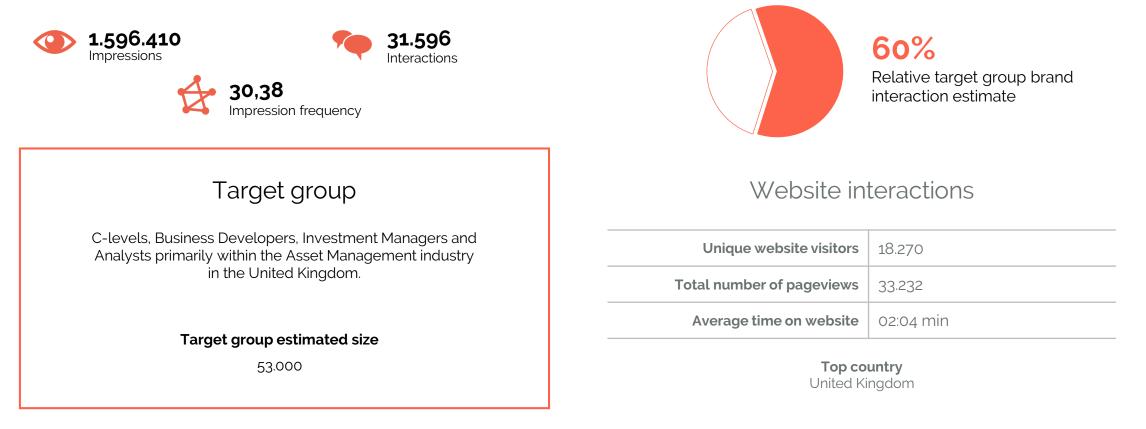
Amount of awareness and brand interactions within the targeted digital campaign promoting Logistics business opportunities in Greater Copenhagen.



### **Brexit - Investment Promotion**

#### Target Group Specific Brand Interaction – Q2-Q3 2017

Amount of awareness and brand interactions within the targeted digital campaign Brexit-related business relocation from the United Kingdom to Greater Copenhagen.



# Startup – Talent Attraction

#### Target Group Specific Brand Interaction – Q2-Q3 2017

Amount of awareness and brand interactions within the targeted digital campaign promoting career opportunities at startups in Greater Copenhagen towards international software developers in connection to TechBBQ 2017.

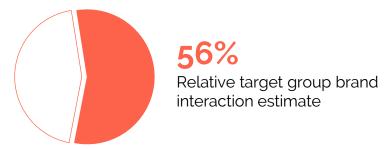


### Target group

A broad range of developer types, including Frontend, Backend, DevOps, Fullstack, Testers, QAs and other IT specialists interested in working in Greater Copenhagen's startup community. The open positions were both full-time and students positions.

#### Target group estimated size

625.000



#### Website interactions

Unique website visitors	122.945
Total number of pageviews	221.957
Average time on website	02:49 min

**Top countries** Mexico, Poland, Brazil, Lithuania, Belgium, Netherlands

### Engineer – Talent Attraction

#### Target Group Specific Brand Interaction – Q3-Q4 2017

Amount of awareness and brand interactions within the targeted digital campaign promoting career opportunities in Greater Copenhagen towards international Engineers and Embedded Software Developers.





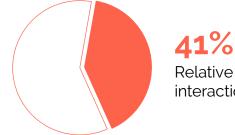
#### 9,09 Impression frequency



A broad range of Engineer types, including Mechanical, Electrical, Automotive, Software, CAD and QA specialists as well as a special focus on Embedded Software Engineers. Minimum 3 years of experience targeted in Europe, Middle East, North America, South America and selected countries in

#### Asia. Target group estimated size

2.500.000



Relative target group brand interaction estimate

#### Website interactions

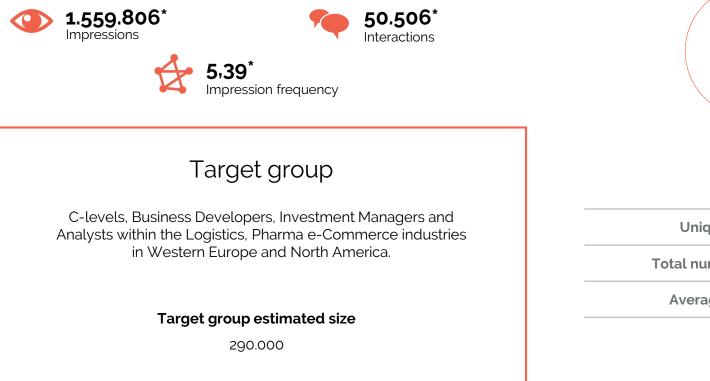
Unique website visitors	259.772
Total number of pageviews	465.374
Average time on website	02:23 min

**Top countries** Mexico, Egypt, Brazil, Romania, India, Italy, Spain, United Kingdom

# Life Science – Investment Promotion

#### Target Group Specific Brand Interaction – Q3 2017 – Q3 2018

Amount of awareness and brand interactions within the targeted digital campaign promoting Life Science business opportunities in Greater Copenhagen.



# R

### **17%**\* Relative target group brand interaction estimate

#### Website interactions

Unique website visitors	165.541
Total number of pageviews	275.289
Average time on website	02:32 min

**Top countries** United States, France, Italy, Belgium, Germany, Romania, Canada

### Food – Investment Promotion

#### Target Group Specific Brand Interaction – Q3 2017 – Q3 2018

Amount of awareness and brand interactions within the targeted digital campaign promoting Food Fermentation and Food Ingredients business opportunities in Greater Copenhagen.





### **32%** Relative target group brand interaction estimate

#### Website interactions

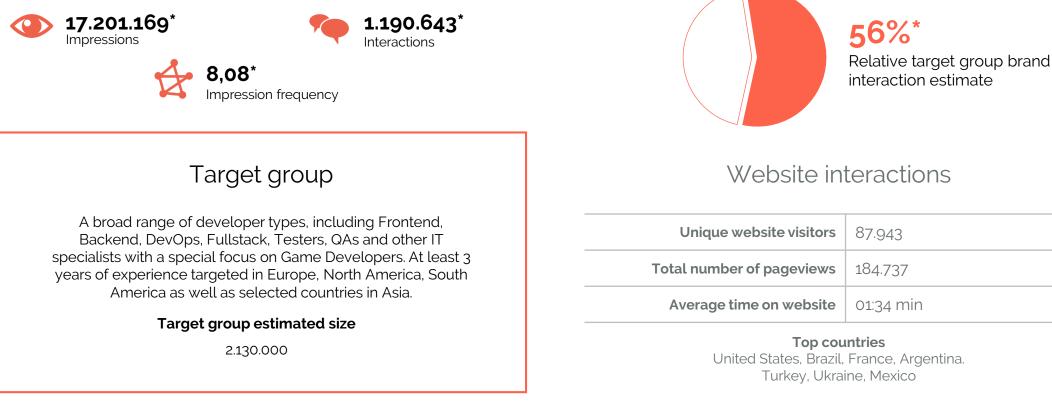
Unique website visitors	27.523
Total number of pageviews	40.803
Average time on website	04:29 min

**Top countries** United States, France, Germany, United Kingdom, Netherlands, Canada, Belgium

### IT/Tech – Talent Attraction

#### Target Group Specific Brand Interaction – Q4 2017 – Q1 2018

Amount of awareness and brand interactions within the targeted digital campaign promoting career opportunities in Greater Copenhagen towards international software and game developers.



\*Awareness and Interactions from Twitch and social sharing by influencers not included

# Life Science – Talent Attraction

406.854

Interactions

#### Target Group Specific Brand Interaction – Q1-Q2 2018

Amount of awareness and brand interactions within the targeted digital campaign promoting career opportunities in Greater Copenhagen towards international Life Science specialists.

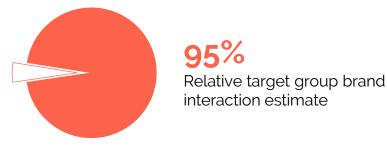




Targeting Regulatory Affairs specialists, Data Scientists, Biostaticians and Quality Assurance/Control Specialists within Life Sciences. Minimum 3 years of experience targeted in Europe, Middle East, North America, South America and selected countries in Asia.

#### Target group estimated size

430.000



### Website interactions

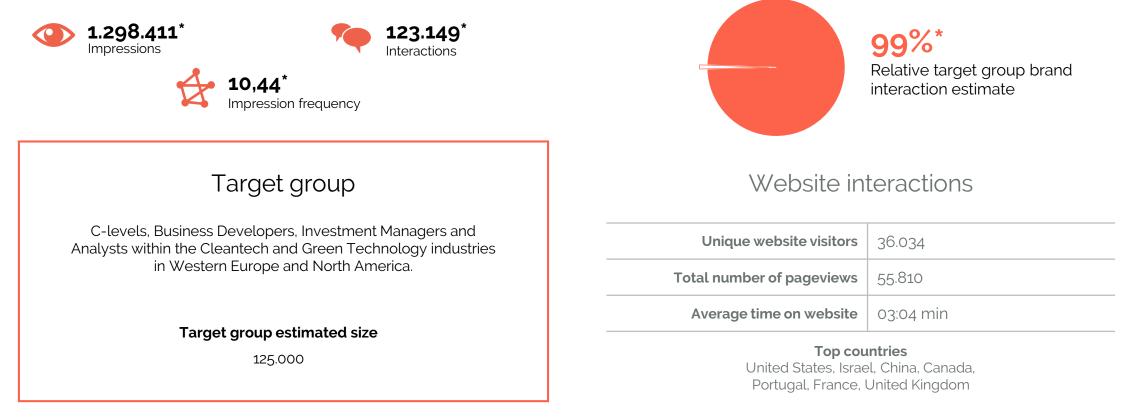
Unique website visitors	28.211
Total number of pageviews	55.366
Average time on website	01:38 min

**Top countries** United States, Brazil, Argentina, Turkey, Spain, United Kingdom, Italy.

# **Cleantech – Investment Promotion**

#### Target Group Specific Brand Interaction – Q2–Q3 2018

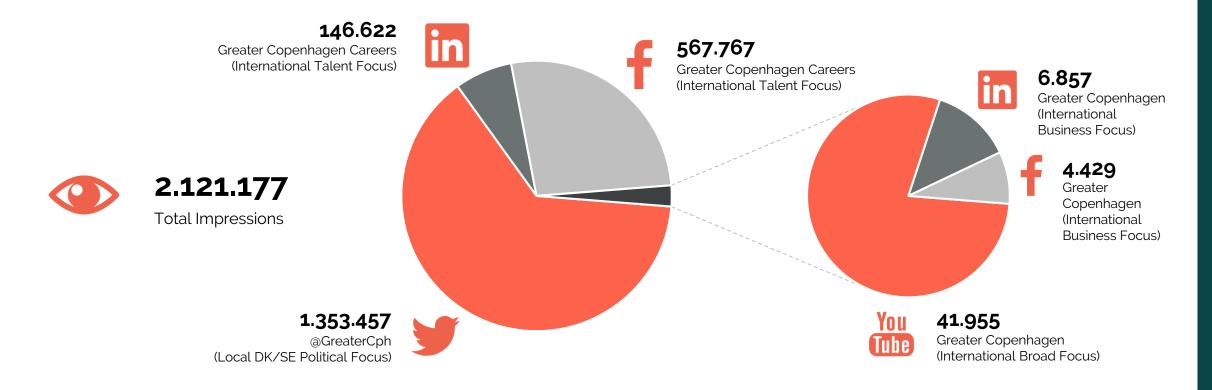
Amount of awareness and brand interactions within the targeted digital campaign promoting Cleantech and Green Technology business opportunities in Greater Copenhagen.



\*Twitter and Display banner Awareness and Interactions not included

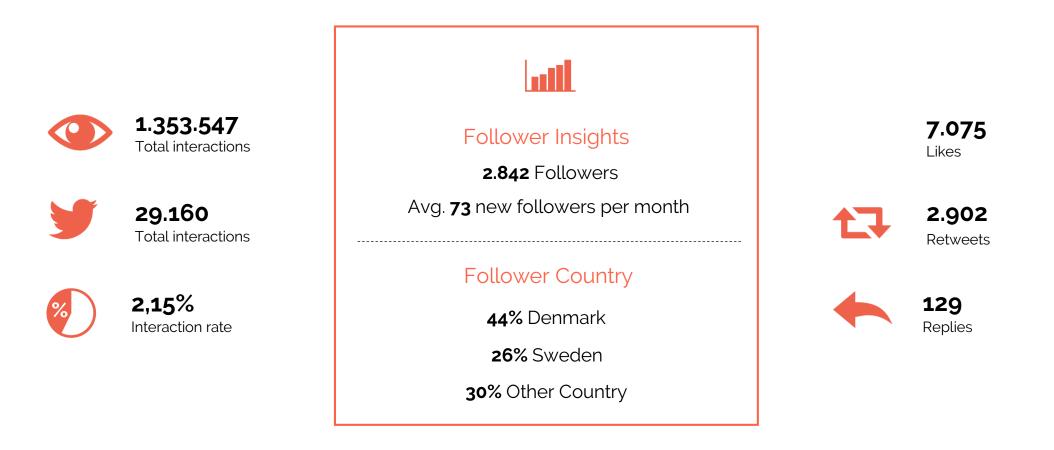
# Organic Awareness

Organic (not paid) impressions and engagement rate across all Greater Copenhagen digital channels for international activities not included in the digital campaigns and digital brand anchoring activities in Denmark and Sweden.



# Twitter Awareness

Total organic Twitter awareness (all paid activity excluded) from the @GreaterCph Twitter account targeting primarily local Danish and Swedish stakeholders.





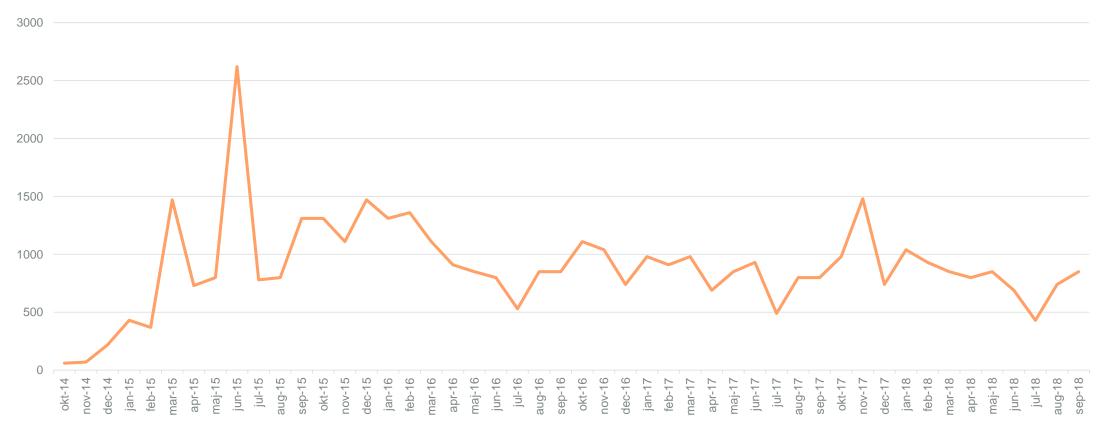
### SECTION 2:

### The use of the term "Greater Copenhagen": Local anchoring



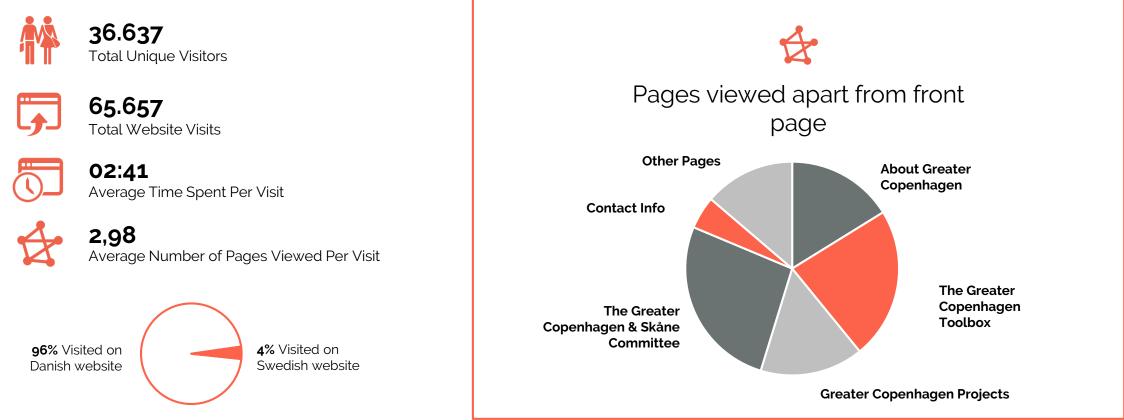
# Google Searches

Monthly Google searches for "Greater Copenhagen" in Denmark and Sweden. Searches for "Greater Copenhagen" from abroad is so limited, that measurement is irrelevant.



# Website Behaviour – local anchoring

Website behaviour on the Danish (<u>www.greatercph.dk</u>) and Swedish (<u>www.greatercph.se</u>) Greater Copenhagen websites. The main purpose of these websites is local anchoring



Affinity Trends

Some of the keywords and hashtags most related to the term "Greater Copenhagen" across digital platforms, blogs and social media.



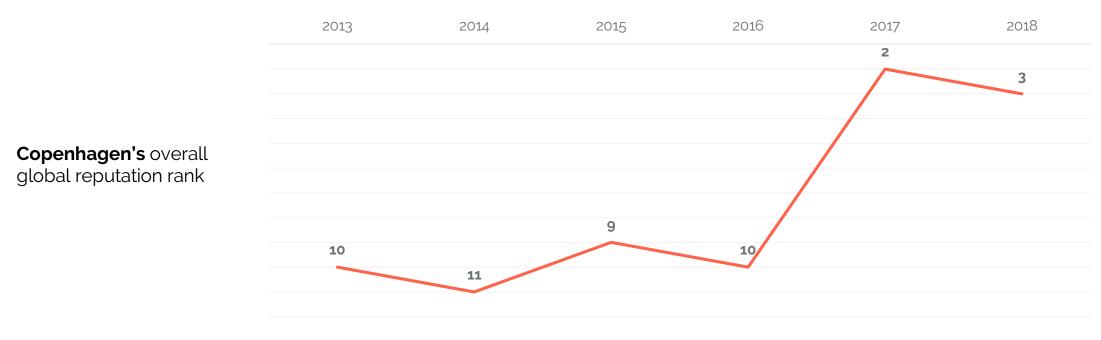


### SECTION 3: "Copenhagen" – general reputation



# RepTrak by Reputation Institute

**Ranking:** Quantitative analysis based on survey with 12,000 (2018) respondents across the G8 countries. Ranking includes 56 cities



Meanwhile, **Denmark's** overall global reputation rank has been fairly stable at the level of #7-9 and **Sweden** has been amongst top 3 during the entire period.

# RepTrak by Reputation Institute

Ranking: Quantitative analysis based on survey with 23,000 respondents (2017) across the G8 countries\*



### GREATER COPENHAGEN

### Analysis by

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Copenhagen Capacity

#### Asbjørn Thorsteinsson Senior Digital Manager Copenhagen Capacity

