



## “Measuring the Image of Berlin”



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The intention was to assess the image change undergone by Berlin three years after the last survey was taken.

- In 2007, TNS Infratest measured the image that Berlin has in various markets and target groups. This evaluation was performed prior to a major image campaign initiated by the city and accordingly can be taken as a reference assessment.
- Since then, the image campaign **be Berlin** has been successfully implemented, which had a considerable reach and impact.
- The follow-up study performed in 2010 assessed the changes in the image of Berlin as a destination, and new image dimensions were included.
- The study focused on **exclusively B2B target groups**, and on countries and cities that are relevant to Berlin in terms of their economies.

## Countries

The survey was performed in selected cities in twelve countries.

UK	London	n=150
FR	Paris	n=116
TR:	Istanbul	n=107
ES:	Madrid, Barcelona, Valencia, Seville	n=100
DK:	Nationwide	n=101
JP:	Tokyo	n=100
CN:	Beijing	n=151
IN:	Mumbai, New Delhi	n=109
BR:	Sao Paulo, Rio, Brasilia, Belo Horizonte	n=101
US:	New York	n=214
AU:	Sydney, Brisbane, Melbourne, Perth	n=150
RU:	Moscow, St. Petersburg	n=111
Total		n=1.510

## Key parameters of the study – quantitative survey

- Parent population      The survey focused on **exclusively B2B target groups**, and on countries and/or cities that are economically relevant to Berlin.
- Method                      Online survey of participants previously recruited from our online panel  
Duration: approximately 10 to 15 minutes
- Field time                    Survey from mid-November until mid-December of 2010
- Weighting                    The total set of data records obtained was weighted based on the gross domestic product of the respective country and the general affinity for Berlin

## Basic results 1

- The **spontaneous associations** most frequently offered, regardless of the country, were the *fall of the Berlin wall*, followed by *Reunification of Germany / Berlin*. The building named most frequently was the *Brandenburg Gate*.
- The ten most frequent associations also included dimensions indicating that Berlin has been able to position itself successfully in the fields of **sciences** and the **economy** (*good research landscape, innovative companies, innovative products “Made in Berlin”*). **The arts and culture** were likewise strongly associated with Berlin.
- In the vast majority of cases, these associations gave rise to **positive emotions**.
- However, the results also indicate that in terms of international perception, Berlin lags behind other top economic metropolises and is less popular as a location for business and industry.

## Basic results 2

- Companies named New York and London as the preferred locations particularly frequently. In Asian countries, they clearly preferred Asian cities (Hong Kong, Shanghai, Mumbai). However, Berlin was named more frequently than had been the case in 2007.
- This positive trend also manifested itself in the evaluation of various, individual aspects of Berlin as compared to those given at the company locations of the respondents. Countries that had been significantly more critical of Berlin in 2007 (such as the United States and the United Kingdom) now evaluated the same aspects in a more positive light. Across all countries, aspects such as *transport / traffic infrastructure and connections, quality of life, availability of recreational areas and parks*, as well as the *proximity to scientific and research institutes* were given the most positive assessments.

## Basic results 3

- The **affinity felt for Berlin** at the private level (*living in Berlin*) and in a business context (*working in Berlin or establishing a company in Berlin / moving to Berlin for professional reasons*) has increased significantly since 2007. Brazil, Russia, India and China, the least developed countries, were most willing to experience Berlin; this trend has not changed since 2007.
- All in all, the respondents continued to evidence a **significant demand for information** about Berlin. More than 80% were interested in obtaining information.
  - The strongest interest was felt in the emerging markets.
  - The respondents were most interested in learning more about Berlin as a business and commercial location, followed by the arts & culture and tourism dimensions.
  - The preferred channel for information cited was a centrally run website, but other channels were also quite significant (nearly 30% of the respondents were open to being contacted personally at events).
  - Events such as the “Berlin Days” were met with great interest – here as well, interest declined the more developed the respective market was.

## Basic results 4

- Many of the persons questioned recommended that Berlin more strongly **develop** its potential as a **location for business and commerce**, while room for improvement was felt to exist also in other fields (tourism, culture, science).
- When asked whether there was something missing in Berlin, half of the respondents replied “No”. The other half addressed quite disparate aspects, among other things the lack of advertisement.



# Conclusions

- Over the past three years, Berlin has made visible progress in the way it is perceived internationally.
  - Overall, the affinity for Berlin as felt in comparison markets (FR, UK, RU, IN, CN, US) has increased significantly;
  - Nearly all of the functional factors making up the location were evaluated more positively than was the case in 2007 – in some cases significantly more so;
  - Berlin was associated consistently with dimensions such as a location for the economy and science, as well as the arts, culture and creativity.
- An analysis of the findings by the countries in which responses were given indicated a need for action in certain aspects (such as the perception of “safety” in JP, DK, AU)
- Furthermore, demand for further information about Berlin was noted in all markets, and in some instances a significant lack of knowledge about the city was apparent. In light of the strong preference for information from a central website, Berlin’s internet presentation should be assessed in terms of its visibility to search engines, content and navigation, and improved wherever necessary.
- Further marketing measures should additionally address the intended image of Berlin, in order to more strongly underline that the city is attractive to foreign investors and their employees.

# Top 10 associations regarding Berlin

Two thirds of respondents associated the fall of the Berlin Wall. The associations overall deviated slightly from what was provided spontaneously. However, the top 10 associations were similar.

## Spontaneous associations

## Overall associations

The fall of the Berlin wall	67	The fall of the Berlin wall	79
Reunification	45	Reunification	68
The Brandenburg Gate	36	Innovative companies	51
Innovative companies	35	The Brandenburg Gate	48
The arts / artists	27	The war	43
World championships in athletics	26	The arts / artists	42
Research landscape	25	World championships in athl	41
Products "Made in Berlin"	25	East Germany	40
Reichstag	24	Reichstag	40
Young people	24	Products "Made in Berlin"	39

Question: Think of the city of Berlin and remember for a moment whatever comes to your mind.

Question: Now, please select all of the aspects you also associate with Berlin.

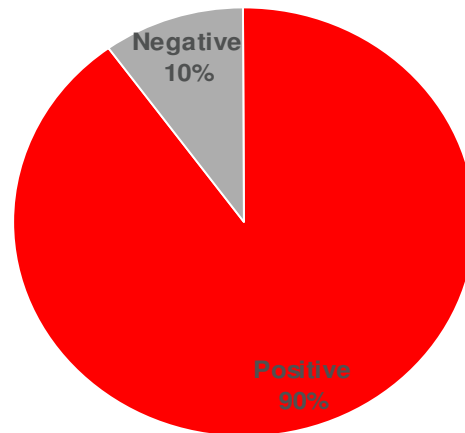
Basis: all respondents n=1.510

Figures given as percentages

# Emotional aspects of the associations

9 out of 10 respondents associated pleasant feelings with Berlin

**Are your feelings about these things more positive or rather negative?**



▪ Negative feelings were cited more frequently, on average, wherever the following associations had been made:

- The war
- National socialism
- In some instances: GDR / East Germany










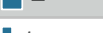




## According to partial samples



Questions: Are your feelings about these things more positive or rather negative?  
Basis: all respondents n=1.510

## Berlin as a preferred location for business 2010/2007

In Russia and Denmark, Berlin was cited by one out of ten respondents as the place where they would prefer to establish a company / relocate their company

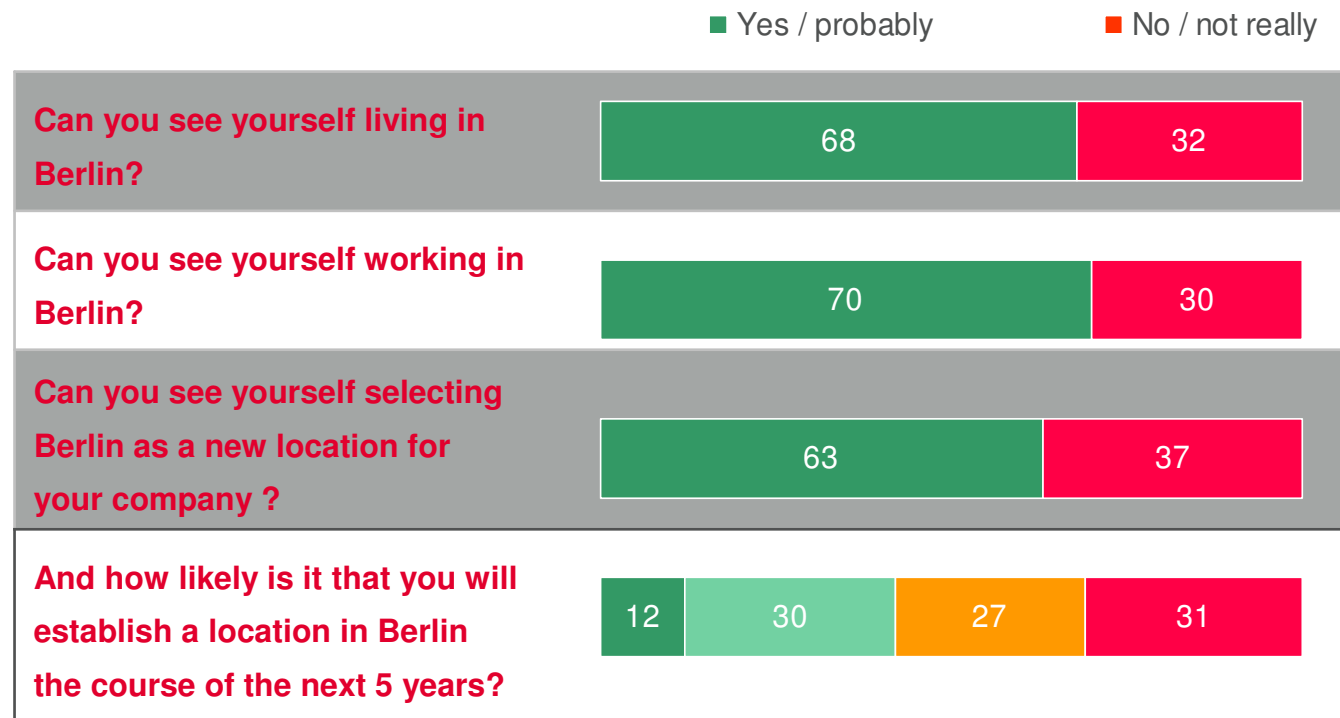
Country	2010	2007	Deviation
DK	 10	na	
RU	 10	 8	+2
ES	 9	na	
TR	 8	na	
BR	 5	na	
FR	 3	 2	+1
CN	 3	 1	+2
AU	 2	na	
IN	 1	 1	+0
US	 1	0	+1
UK	0	0	+0
JP	0	na	

Question: Which of the cities listed here would be your first choice?  
Basis: all respondents n=1.510

Figures given as percentages

# Affinity for Berlin

In theory, the willingness to live or work in Berlin was quite high for all respondents



Very Somewhat Not really Highly unlikely

Basis: all respondents n=1.510

Figures given as percentages

# Affinity in 2010 as compared to 2007

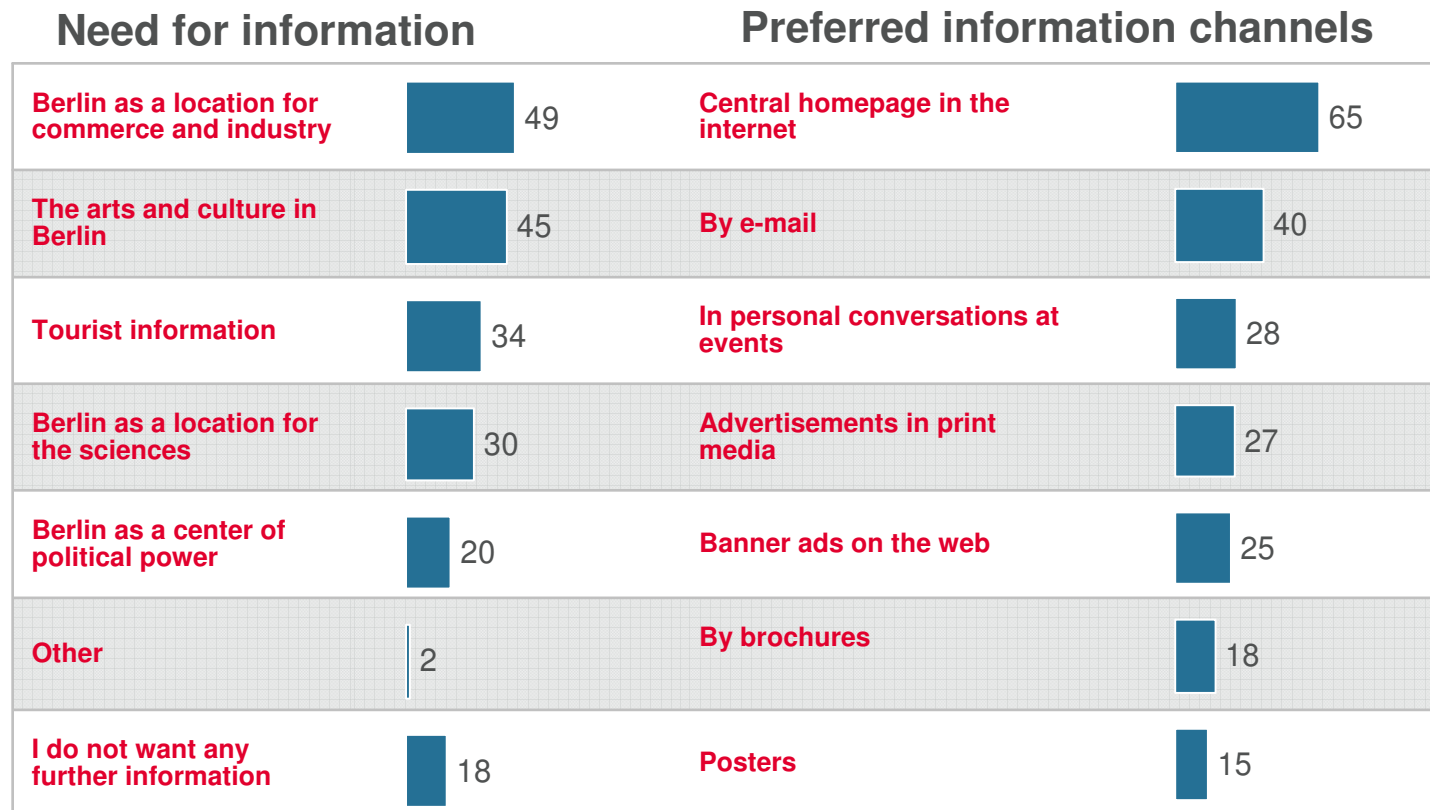
All in all, the affinity felt for Berlin increased significantly as compared to 2007

Country	Living in Berlin 2010	Working in Berlin 2010	Conceivable 2010	Likely 2010
UK	46	55	39	21
FR	73	72	66	33
RU	79	87	77	39
IN	83	88	87	77
CN	95	94	89	71
US	43	49	37	26
	Living in Berlin 2007	Working in Berlin 2007	Conceivable 2007	Likely 2007
UK	24	32	24	14
FR	36	38	38	8
RU	61	73	66	18
IN	68	69	68	55
CN	87	85	77	58
US	19	22	14	6

Basis: all respondents in UK, FR, RU, IN, CN, US n=851

Figures given as percentages

About half of the respondents were interested in obtaining more information about Berlin as a location for commerce and industry

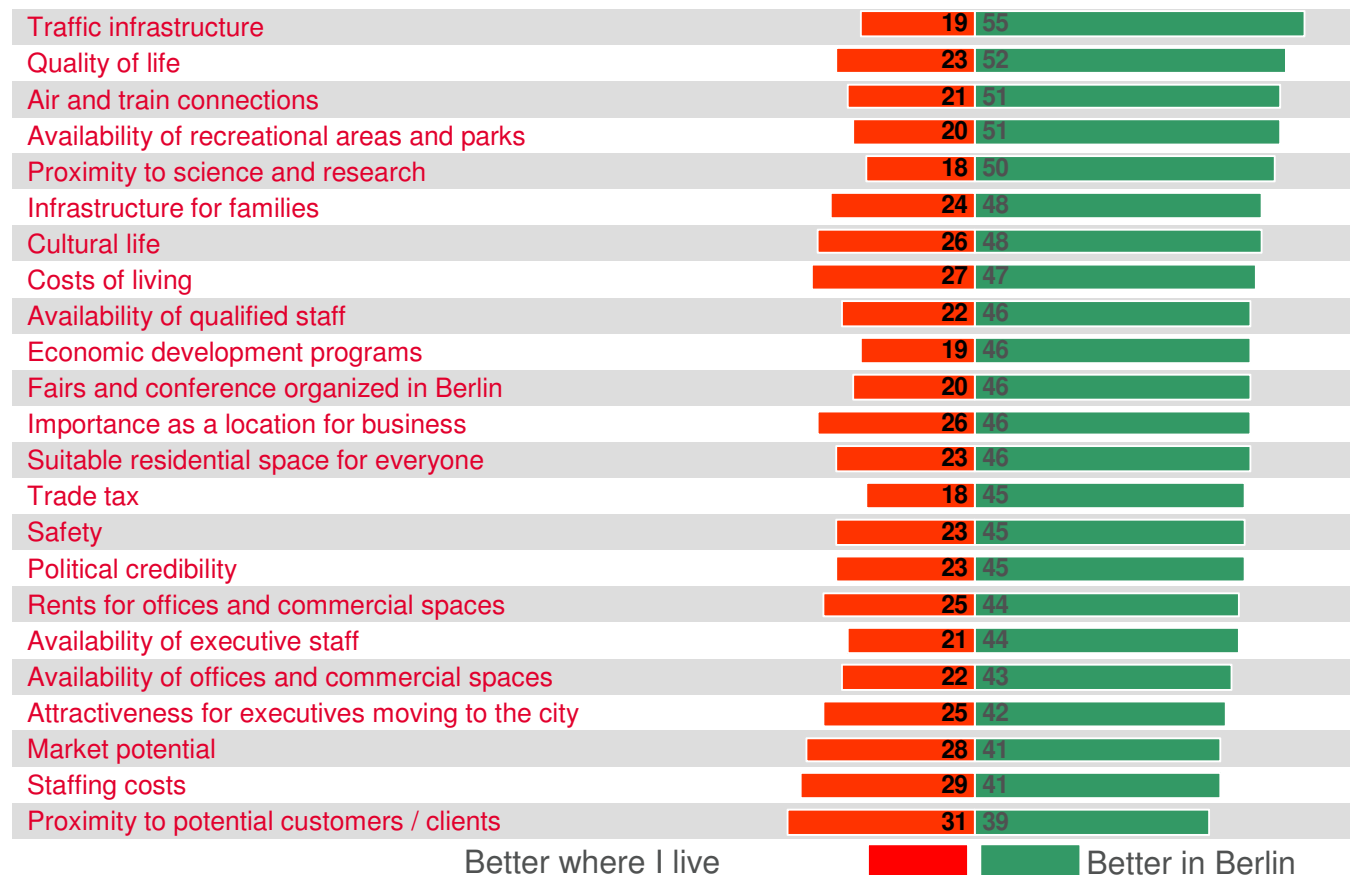


Question: About which aspects of Berlin would you like to learn more? How would you prefer to be informed?  
 Basis: all respondents n=1.510

Figures given as percentages

# Overall assessment of Berlin

In all countries, Berlin's traffic infrastructure is given excellent grades as compared to the city the respondents were living in



Question: Please tell me for each of these criteria how you evaluate Berlin as compared to the location of your company.  
 Basis: all respondents (n = 1.510) – all figures given as percentages