

Perth's City Reputation: Summary Report

Prepared for:
The Committee for Perth

Prepared by:
Ipsos



GAME CHANGERS



Background and research objectives

The Committee for Perth seeks to strengthen Perth's global reputation as a desirable and competitive place to live, work, study, invest and visit. The research supports this objective by identifying how Perth residents perceive their city's reputation, and how this compares with the perspectives of residents from five other key cities in the region.



Measure how residents of Perth, Sydney, Melbourne, Brisbane, Auckland and Singapore view their own and comparator cities as a place to live, work, study, invest and visit



Identify what residents see as their city's main drawcards (and shortcomings) for attracting people to live, work, study, invest and visit



Compare perceptions of Perth among those residents born in Perth versus those who were born overseas



Identify current sources of influence and information that drive positive and negative sentiment when it comes to Perth's city reputation



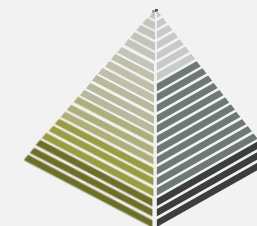
Identify communication opportunities to correct misperception by analysing perceived strengths and weaknesses in conjunction with external objective measures



Identify key weaknesses the Perth city brand must overcome in order to be seen as a competitive city to live, work, study, invest and visit



Identify new opportunities and white spaces for positioning Perth and shaping its reputation as a desirable and competitive place to live, work, study, invest and visit



LIVE



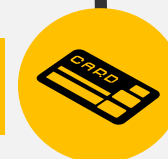
WORK



STUDY



INVEST



VISIT



Research approach

The research sampled the general population across six metropolitan locations, including four Australian cities and two international locations.

Interlocking age and gender quotas were set and weighting applied during the analysis stage to ensure results are representative of target demographics and deliver robust results at the 95% confidence level. Additionally, quotas were set for Australian born vs. overseas immigrants for the Perth sample.



ONLINE SURVEY

- Panel Sample n=2,527
- Field period: 18 April – 7 May 2019
- Interlocking age x gender targets and weighting applied

PERTH METRO SEGMENT n=600

SYDNEY METRO SEGMENT n=385

MELBOURNE METRO SEGMENT n=385

BRISBANE METRO SEGMENT n=385

AUCKLAND METRO SEGMENT n=387

SINGAPORE SEGMENT n=385



SIGNIFICANT DIFFERENCES

ARE INDICATED BY UPWARD (SIGNIFICANTLY HIGHER) OR DOWNWARD (SIGNIFICANTLY LOWER) FACING ARROWS AND ARE CALCULATED AT 95% CONFIDENCE INTERVALS. THEY INDICATE DIFFERENCES BETWEEN SEGMENTS.

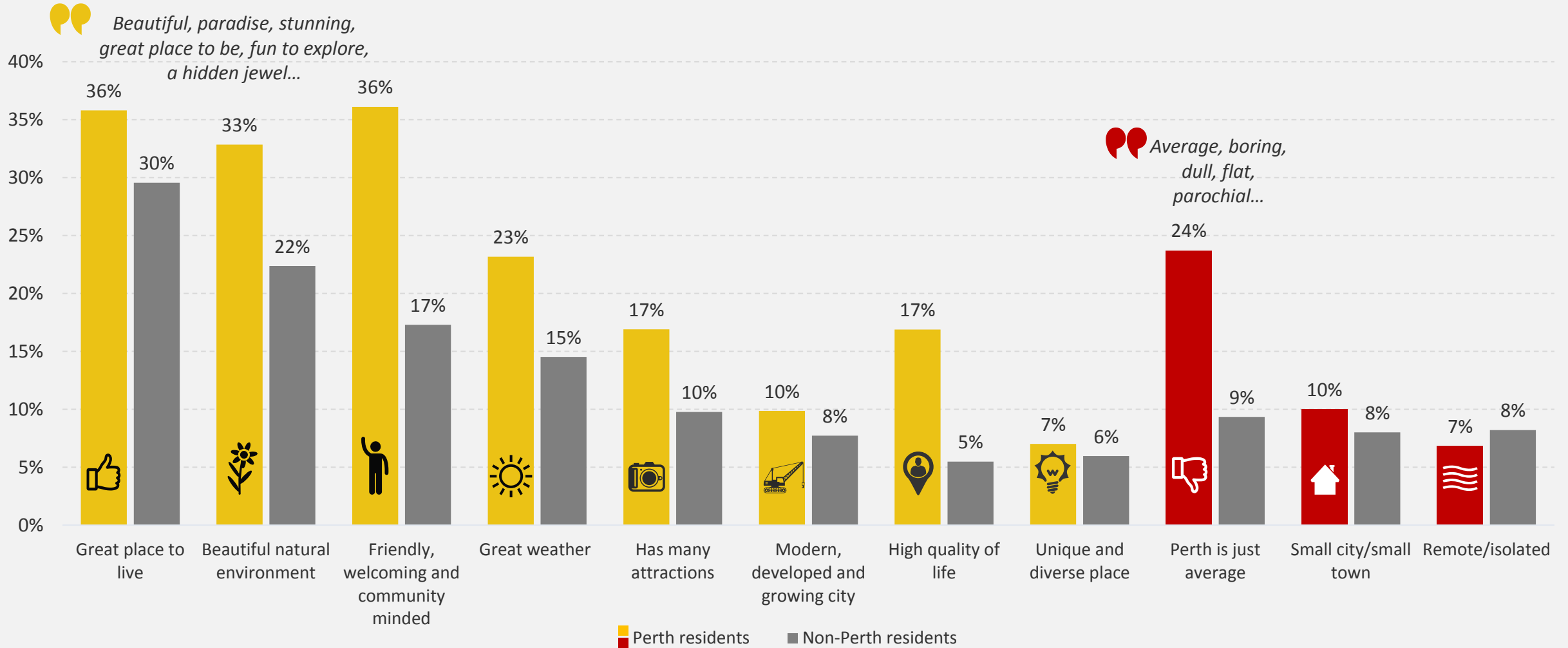
What is top of mind
about Perth?



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Top of mind perceptions of Perth



**How does Perth's
reputation compare
to that of other
key cities?**

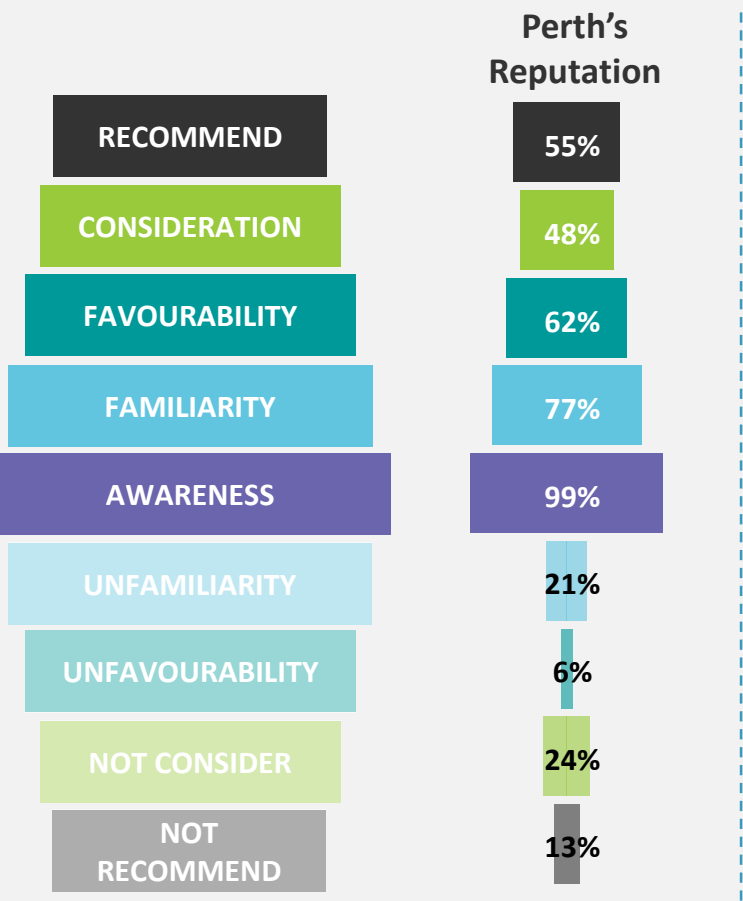


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City reputation among non-residents

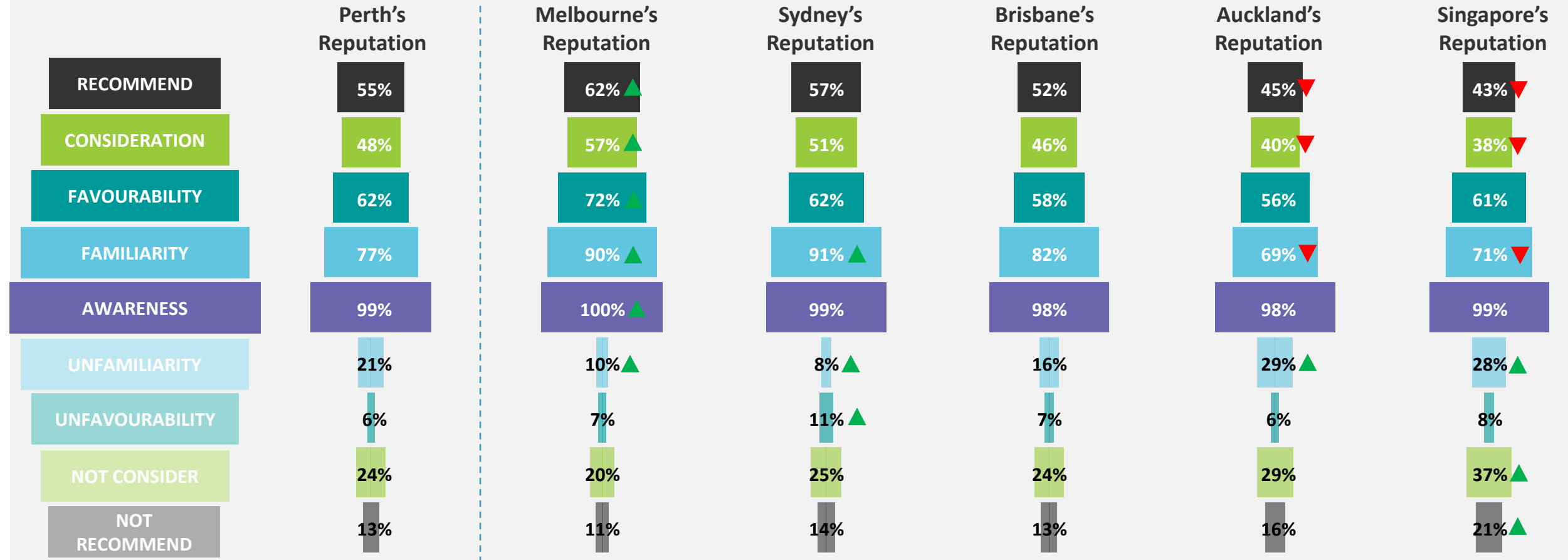
Perth has a moderate reputation among residents of other key cities.



City reputation among non-residents

Melbourne has the strongest reputation among external audiences.

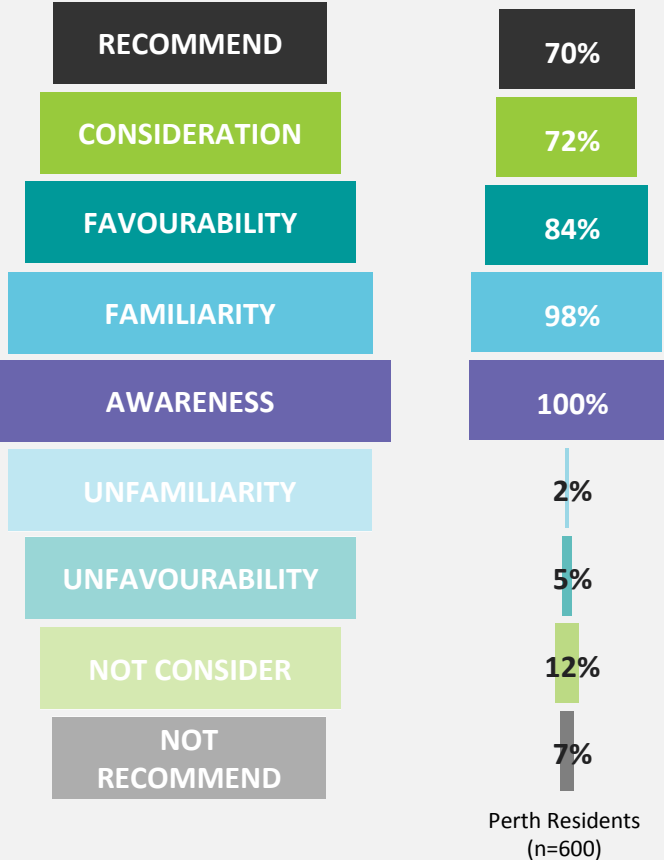
Perth outperforms Auckland and Singapore, but is seen as on par with Brisbane and also Sydney on key metrics.



Q3. Awareness (Top 4 Box) | Q3. Familiarity (Top 3 Box) | Q4. Favourability (Top 2 Box) | Q5. Consideration (Top 2 Box) | Q7. Recommend (Top 2 Box) | Q3. Unfamiliarity (Second To Bottom, 1 Box) | Q3. Unfavourability (Bottom 2 Box) | Q4. Not Consider (Bottom 2 Box) | Q7. Not Recommend (Bottom 2 Box). BASE: Panel Sample n= 2,527. Perth residents n=600, Melbourne Residents n=385, Sydney Residents n=385, Brisbane Residents n=385, Auckland Residents n=387, Singapore Residents n=385.

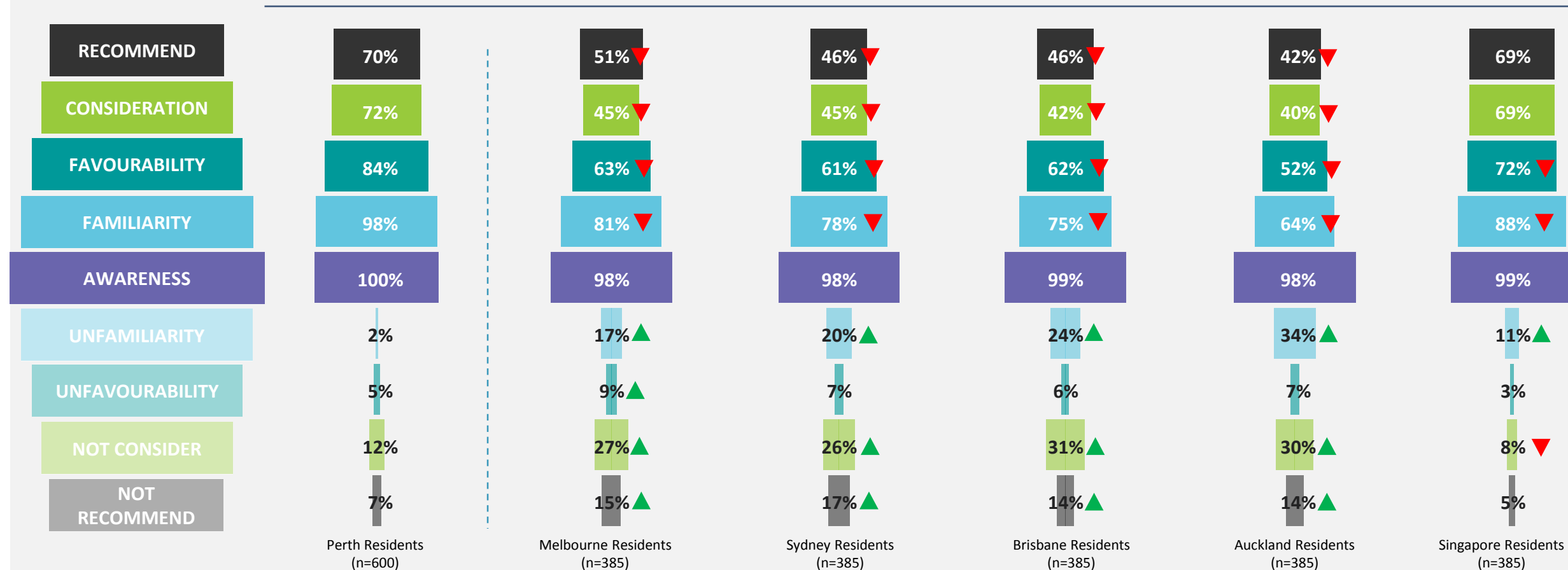
Perth has a stronger reputation among its own residents

Perth's Reputation



But it sees itself more positively than how residents of all other cities see it

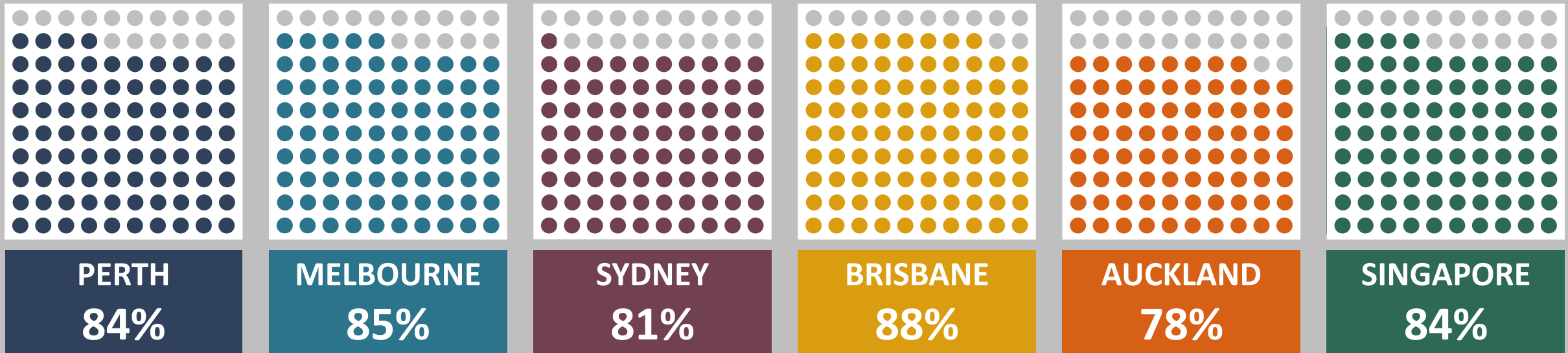
Perth's Reputation



This is not unique to Perth and Perth is no less likely to self-promote

Residents from all six cities tend to be more favourable towards their own city, and Perth's self-favourability is no weaker than that of other cities.

Self-favourability:

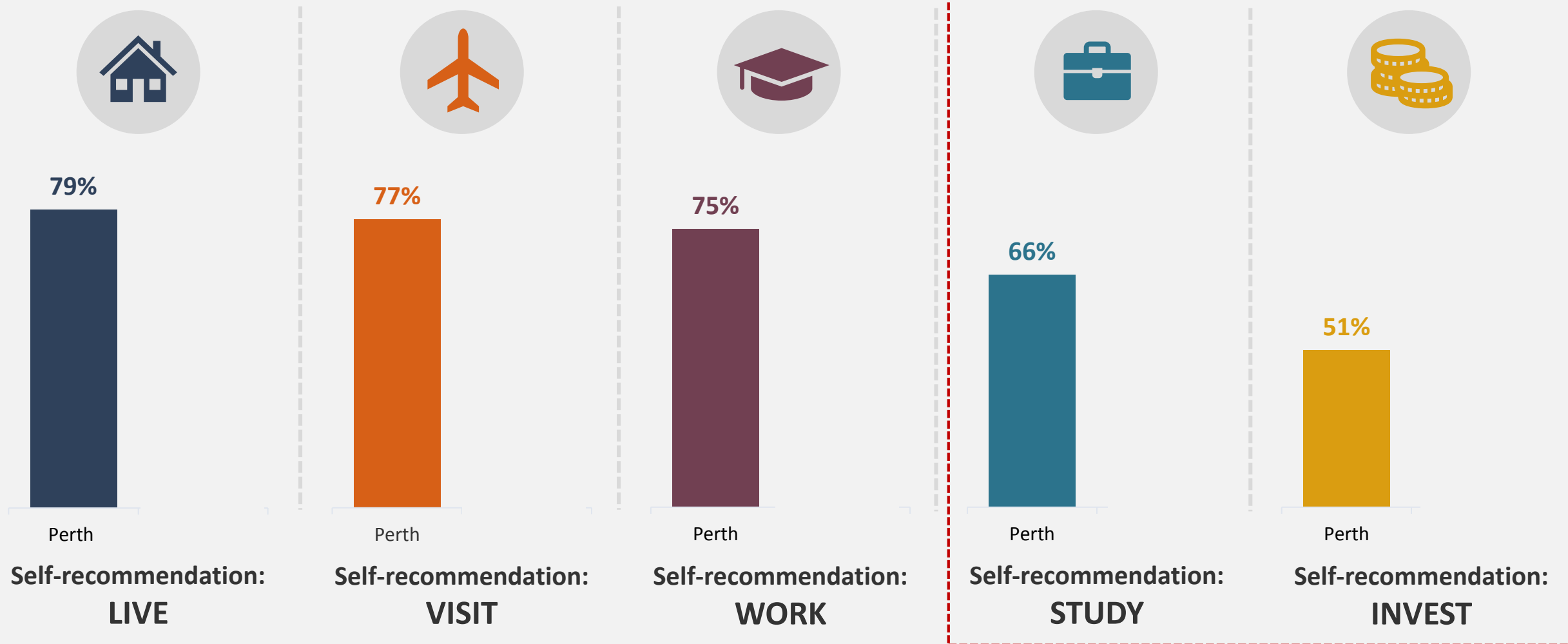


**What are Perth
residents willing to
recommend their
city for?**



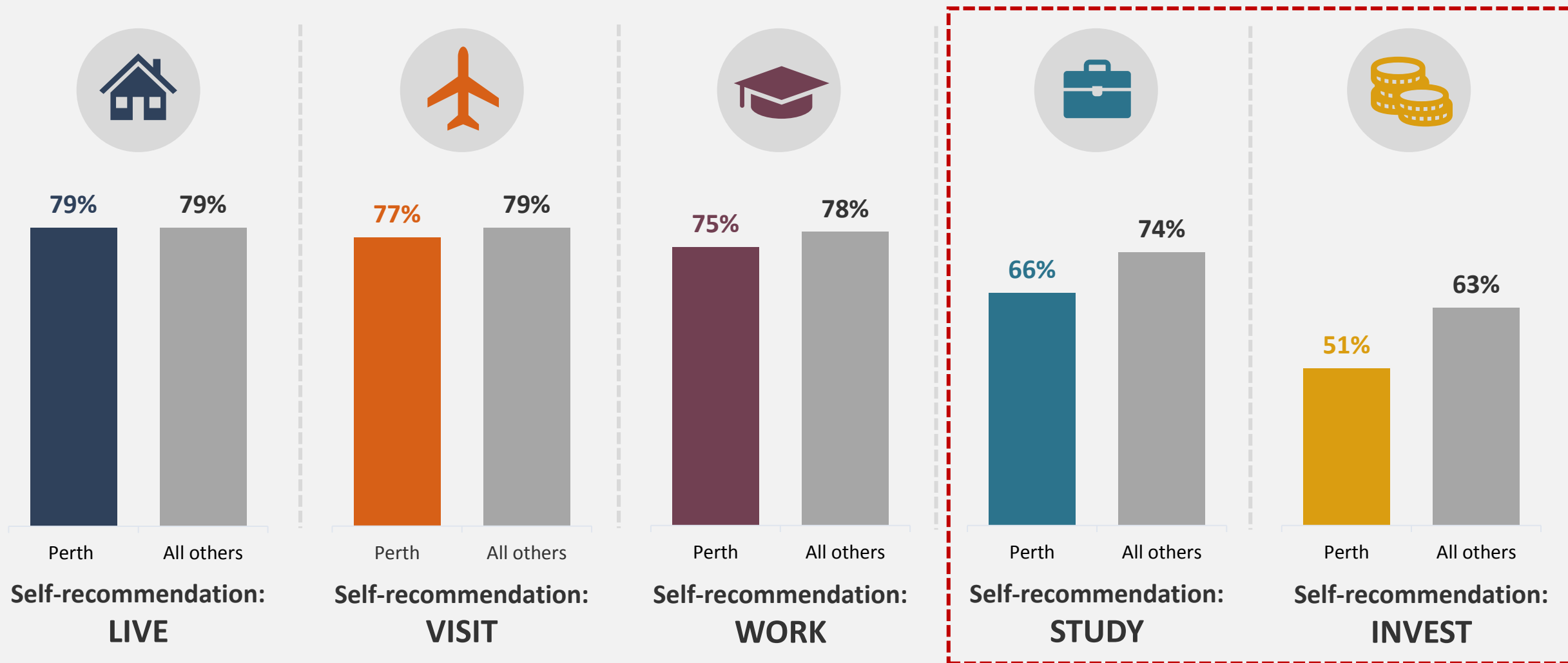
Perth's self-recommendation across activities

While Perth residents are comfortable recommending their city as a place to live, visit and work, they're less confident when it comes to being a city to study and invest in.



Perth's self-recommendation across activities

Perth residents' self-recommendation is on par with residents of other cities' self recommendation for live, visit and work, but other cities are more likely to recommend themselves as places to study and invest.

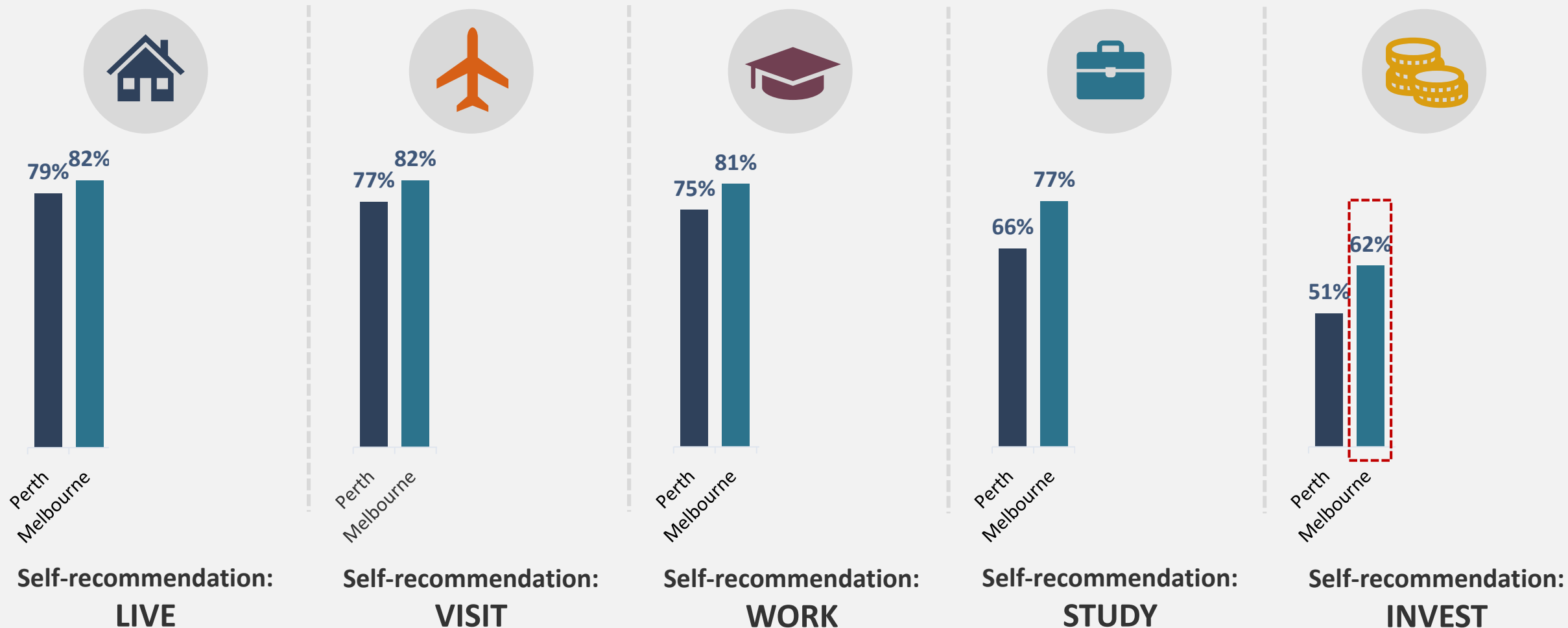


Q7. Recommendation

BASE: Panel Sample n= 2,527. Perth residents n=600, Melbourne Residents n=385, Sydney Residents n=385, Brisbane Residents n=385, Auckland Residents n=387, Singapore Residents n=385.

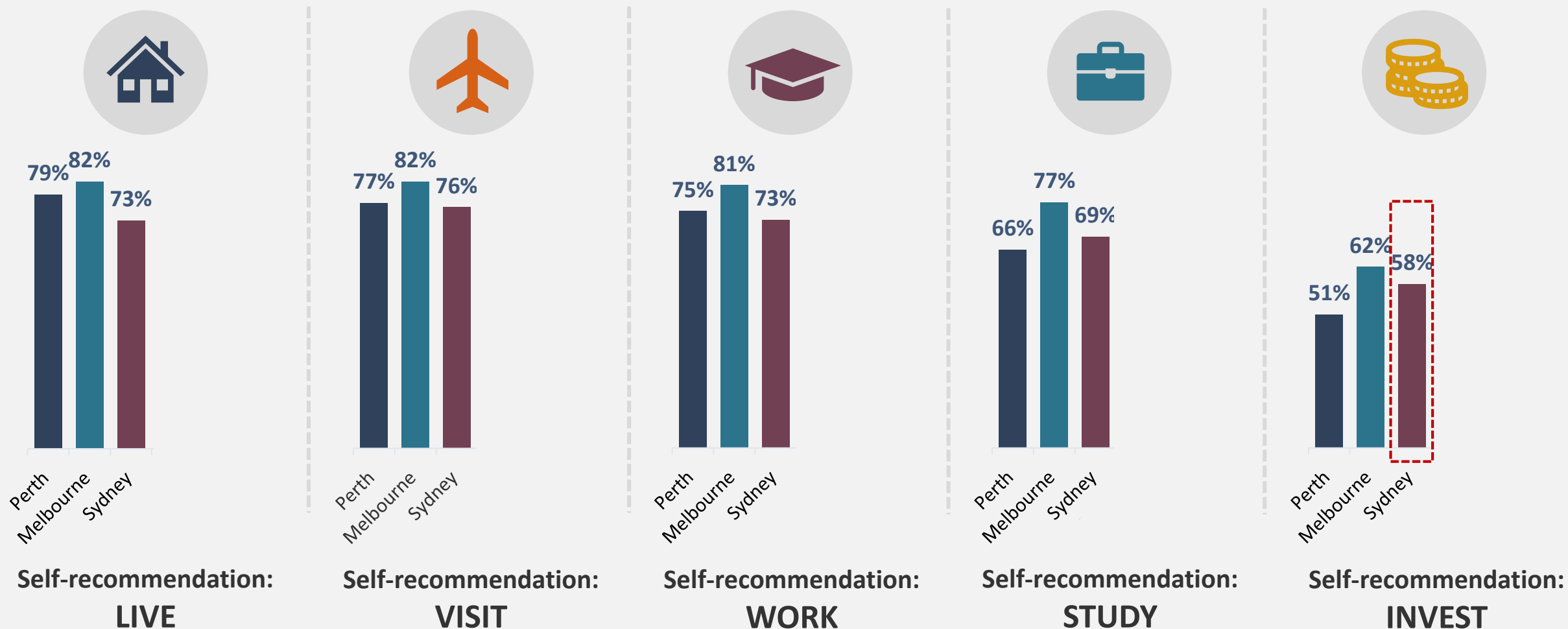
Melbourne's self-recommendation across activities

Melburnians are more confident in their appeal as an education centre, however, like Perth residents, they see their city's weakest area as investment.



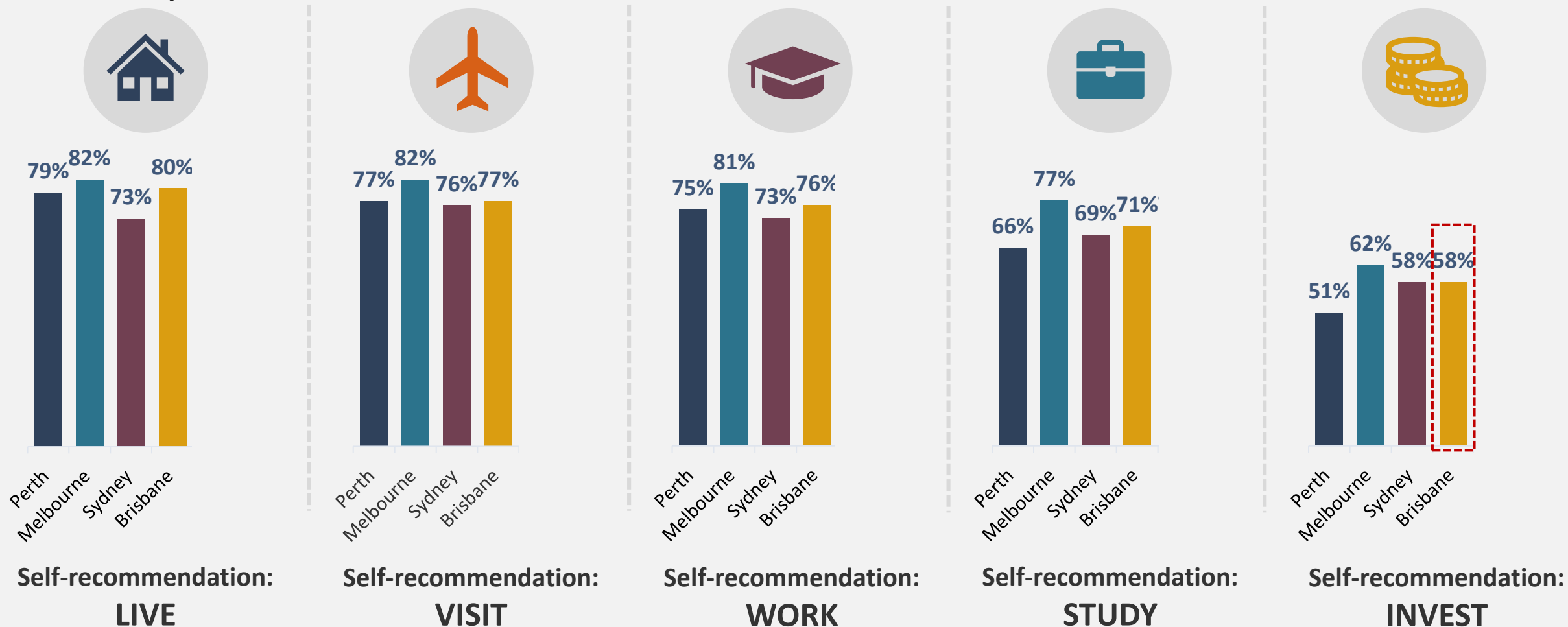
Sydney's self-recommendation across activities

Sydney-siders are slightly weaker advocates for their city compared to Melburnians and also see investment as their weakest offer.



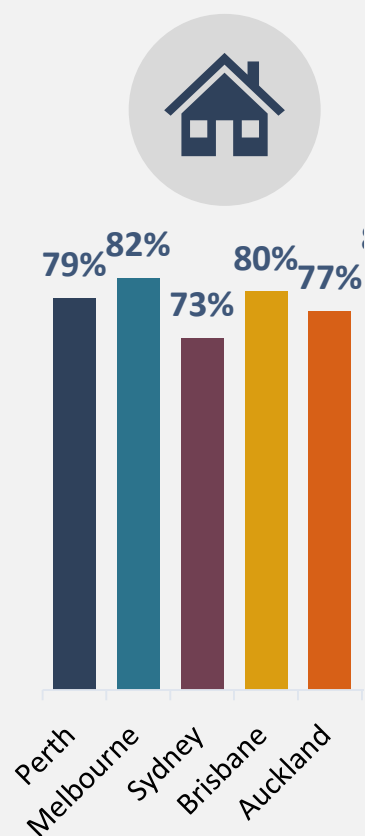
Brisbane's self-recommendation across activities

Brisbanites mirror Melburnians in how they see their own city with strong perceptions in all areas other than investment. Perceptions are on par with those of Perth residents in terms of their city's appeal as a place to live, visit and work, but stronger for both study and invest.

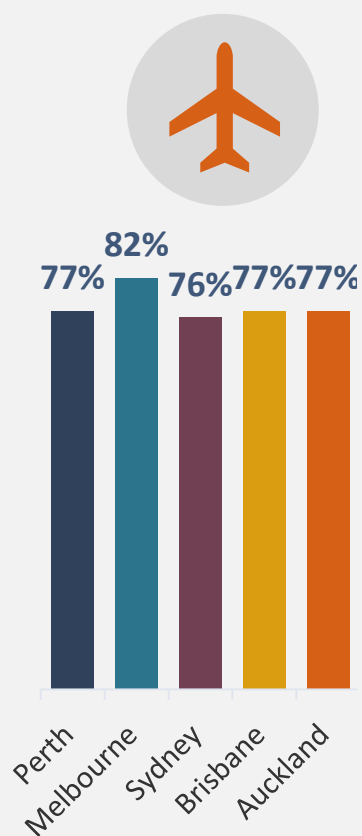


Auckland's self-recommendation across activities

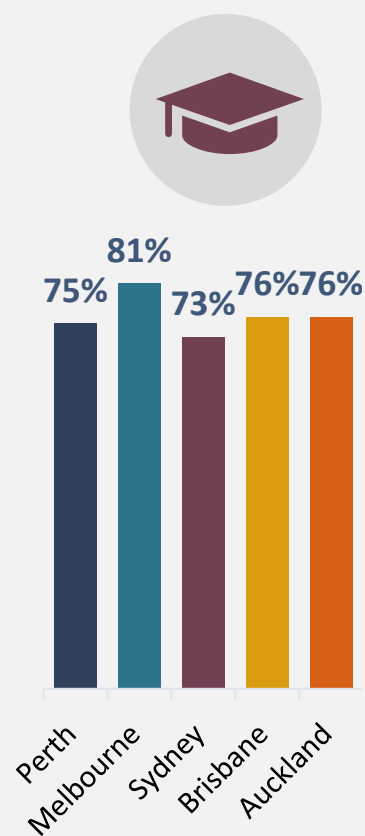
Aucklanders are virtually identical to Brisbanites in how they see their own city with investment being the key area of weakness.



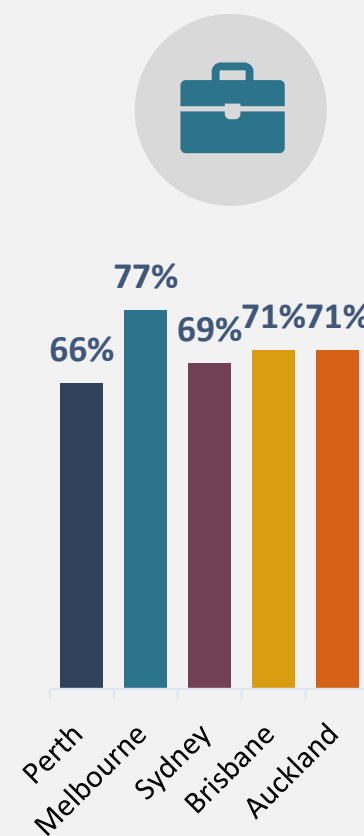
Self-recommendation:
LIVE



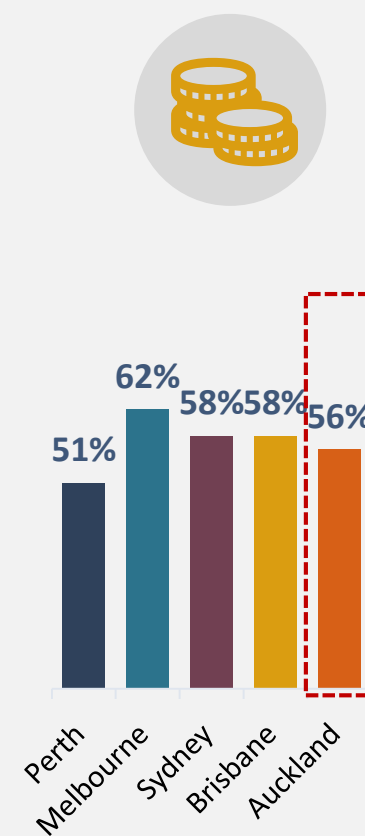
Self-recommendation:
VISIT



Self-recommendation:
WORK



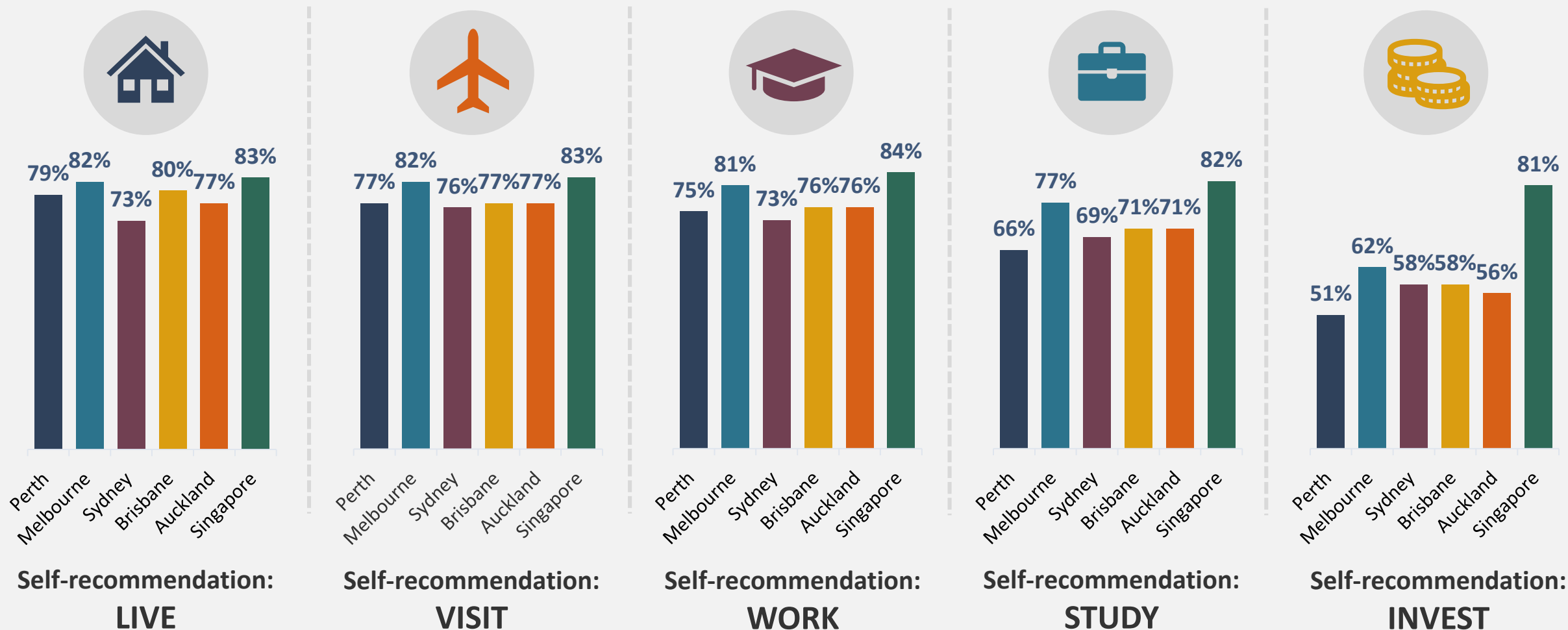
Self-recommendation:
STUDY



Self-recommendation:
INVEST

Singapore's self-recommendation across activities

Singaporeans are uniquely strong advocates of their own city with more than four-in-five willing to recommend it across all five key activities. Unlike all other cities, invest is not an area of perceived weakness for Singaporeans.



Melbourne is consistently ranked highly

While residents all see their own city as the best, Melbourne is consistently ranked second across every market and for all activities; it is universally appealing.



Melbourne ranked **2nd** as place to:



LIVE



WORK



STUDY



INVEST (tied with SYDNEY)



VISIT

**What is Perth's
reputation as a city
to invest in among
business influencers?**



Focusing on business influencers

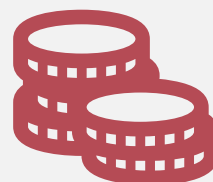
15%

OF THE SAMPLE ARE INFLUENCERS WHO HAVE
DECISION MAKING POWER OR ARE INFLUENTIAL

*in their companies
when it comes to **doing
business nationally** or
internationally*



60% of influencers
have a bachelor or
postgraduate degree



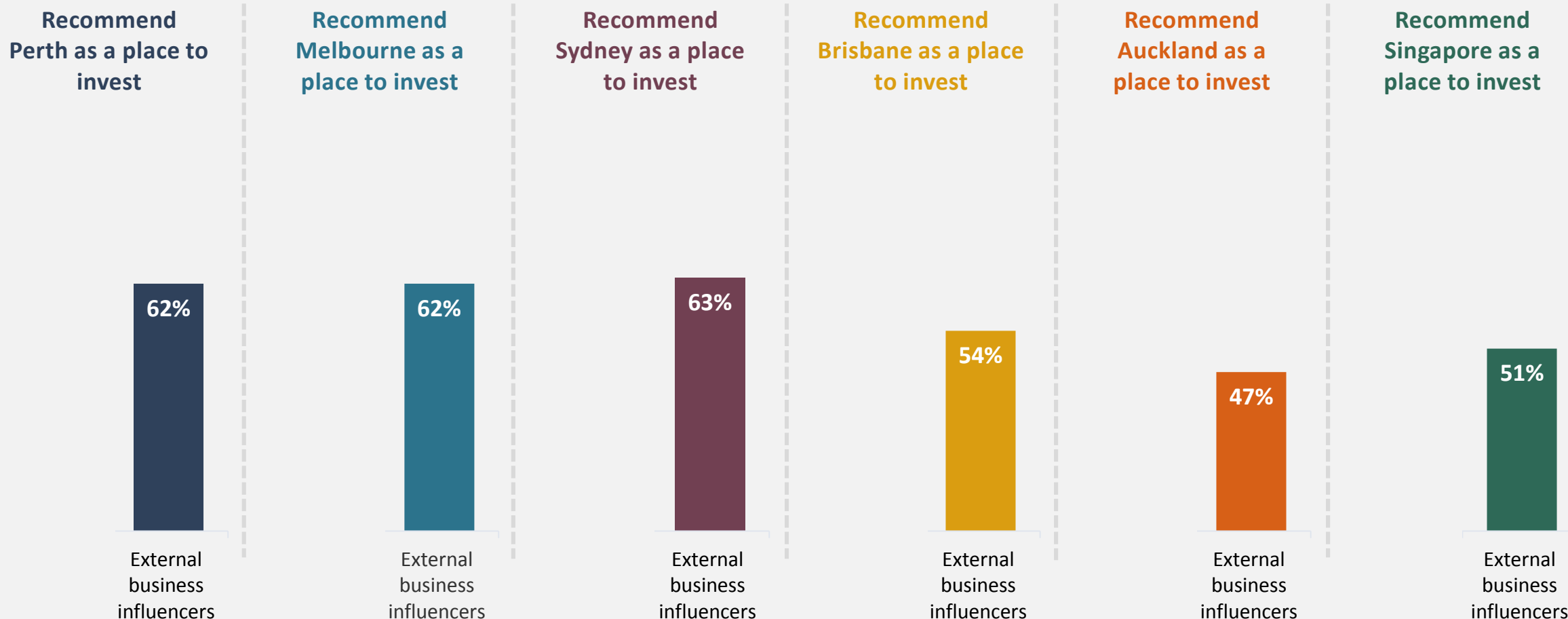
32% have an
annual personal
income of \$100,000
or over



53% travel
internationally for
work at least 1-2
times a year

Perth is on par with Melbourne and Sydney as a place to invest

Among the external business influencer audience, Perth is an equally appealing investment market as Melbourne and Sydney, and more appealing than Brisbane, Auckland and Singapore.

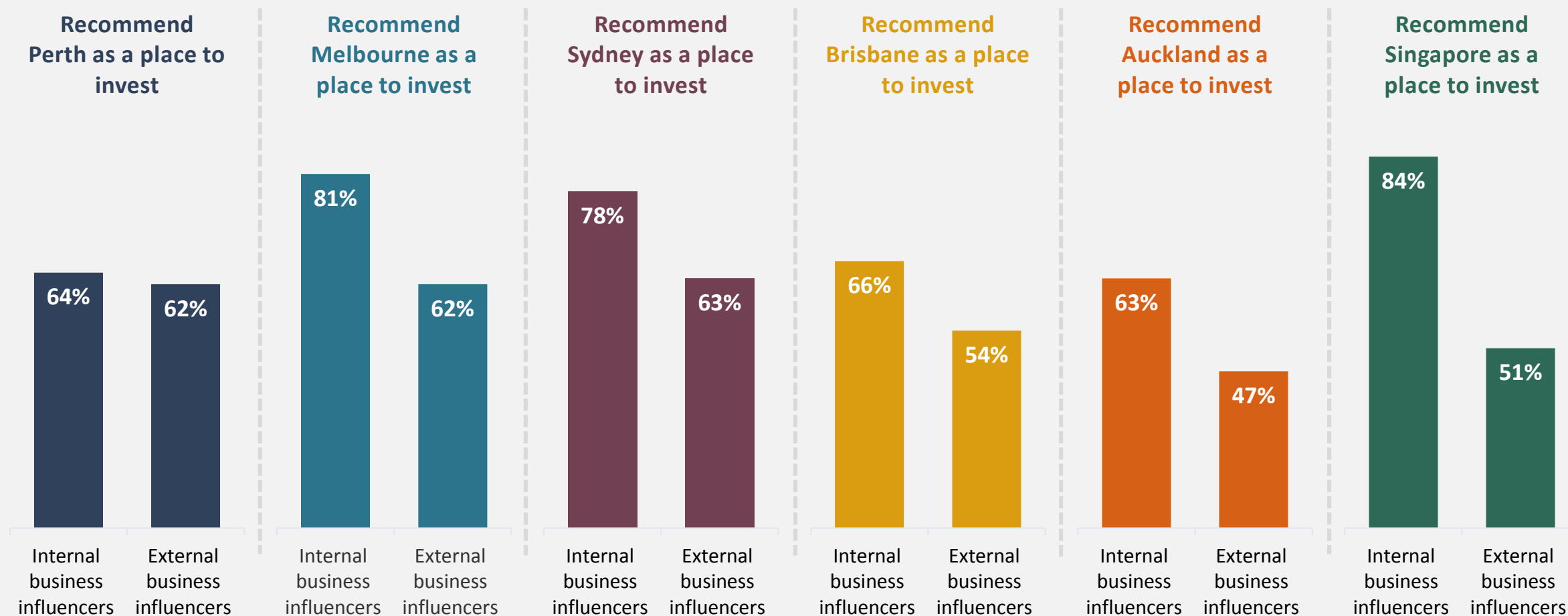


Q7. Recommendation

BASE: Panel Sample n= 2,527. External business influencers = business influencers who do not live in the city being rated as a place to invest (i.e. the sample for Perth is business influencers from Melbourne, Sydney, Brisbane, Auckland and Singapore.) Business influencer sample: Perth n=72, Melbourne n=43, Sydney n=65, Brisbane n=50, Auckland n=46, Singapore n=108.

But Perth's business influencers underperform as advocates

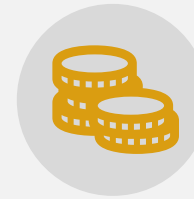
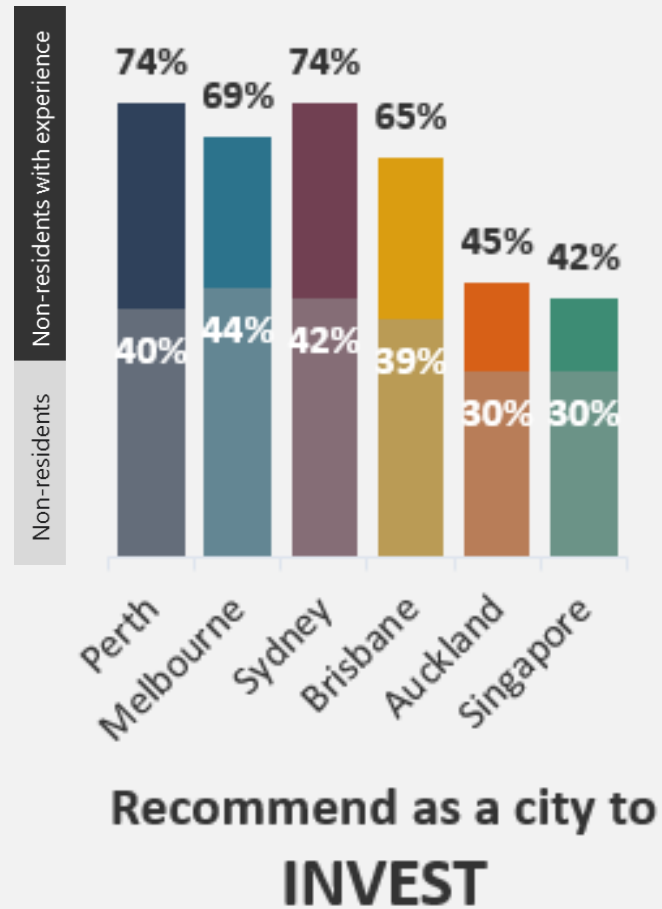
Every city other than Perth receives a sizeable boost from its own business influencers in recommendation as a place to invest.



Q7. Recommendation

BASE: Panel Sample n= 2,527. Influencers Perth n=72, Melbourne n=43, Sydney n=65, Brisbane n=50, Auckland n=46, Singapore n=108.

While those from outside Perth who have actually invested here would recommend



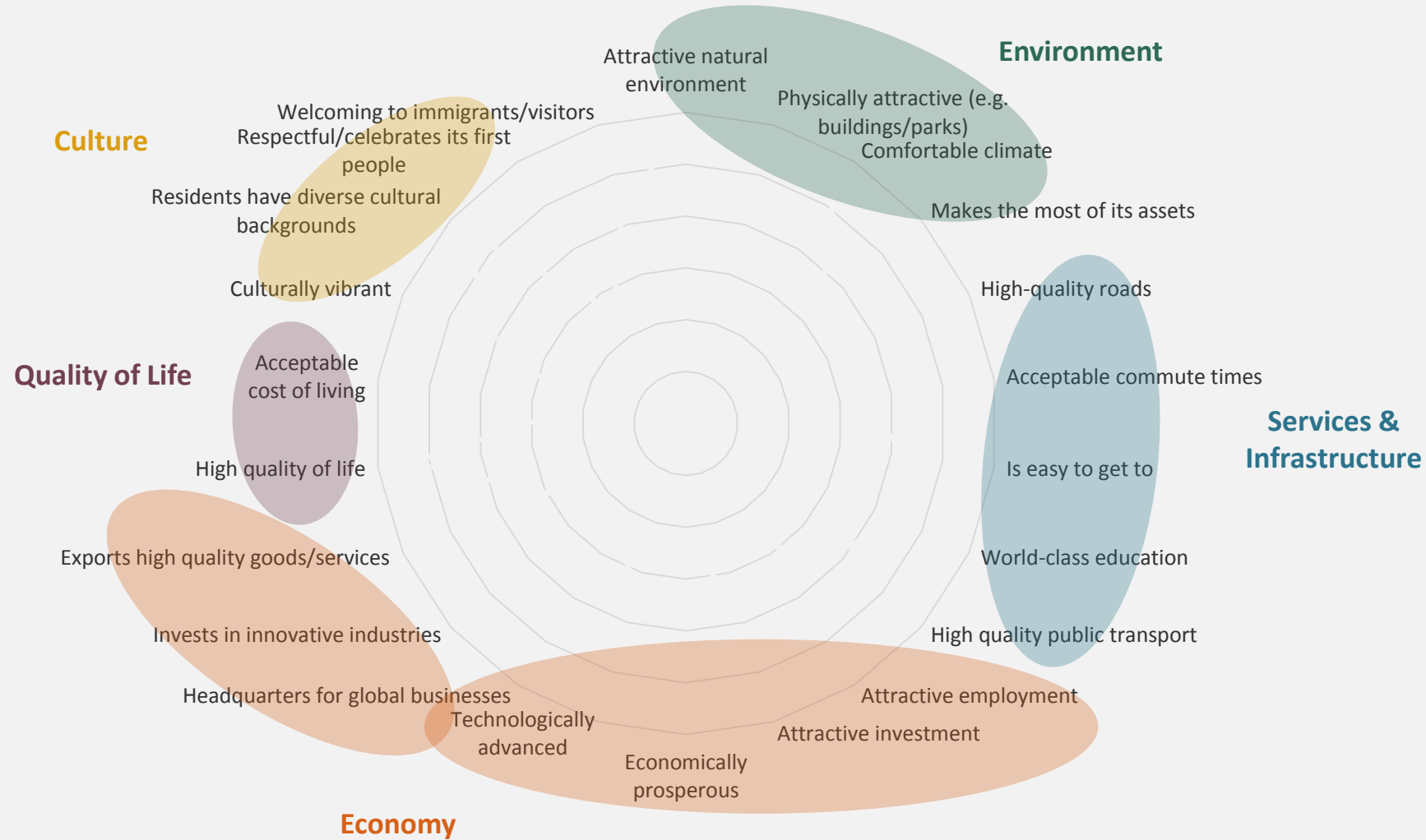
What are Perth's perceived strengths and weaknesses?



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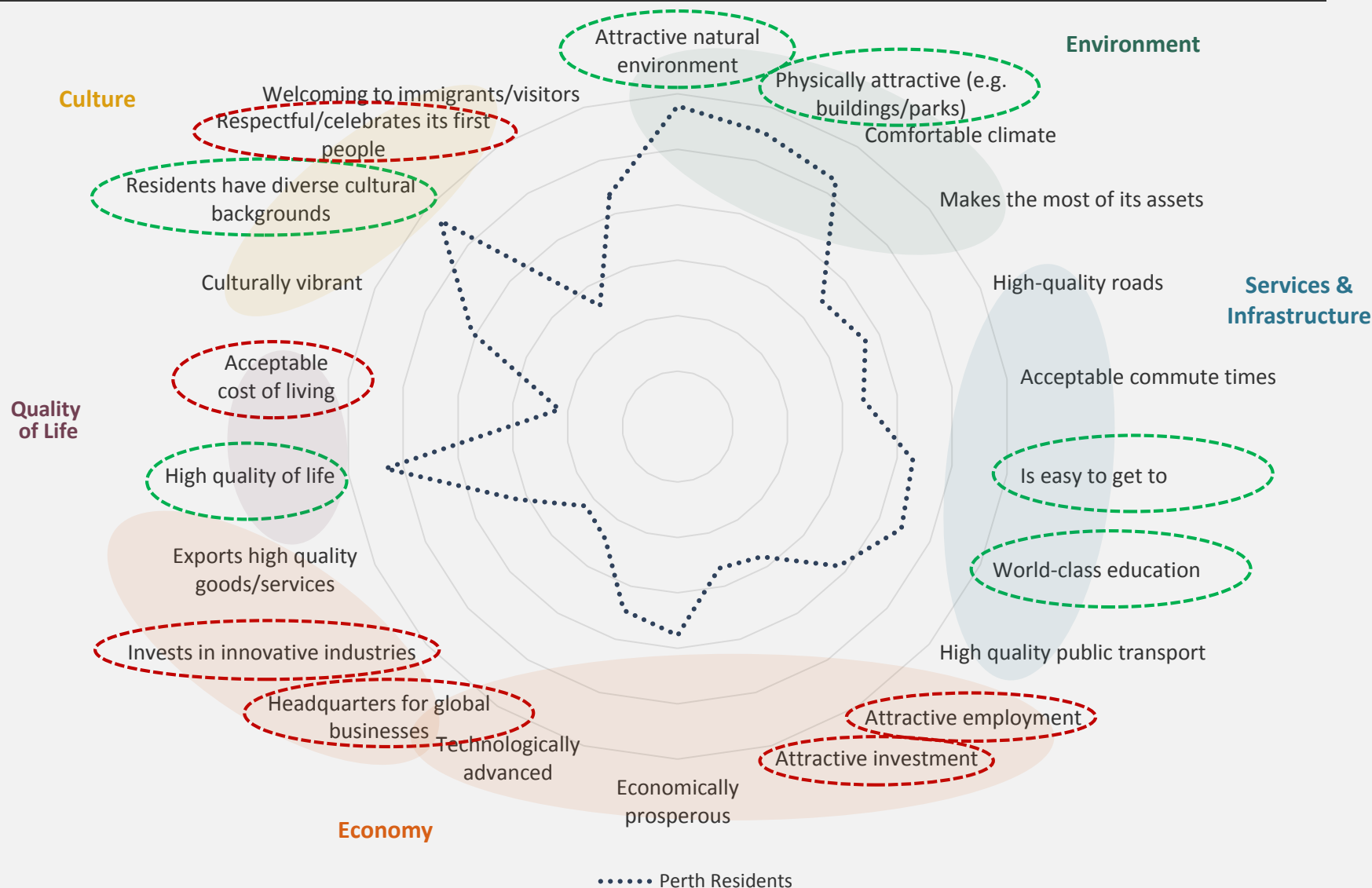


Perceptions of Perth



Perceptions of Perth were measured across five key dimensions.

Perceptions of Perth among Perth residents



Perth residents see the city's **strengths** as its natural environment and physical beauty, high quality of life and diverse population.

Areas of **weakness** are investment and employment opportunities, global headquarters, innovation, cost of living and treatment of first people.

Perceptions of Perth among Singapore residents



Singaporeans have a **positive** view of Perth seeing many of the same strengths as residents.

Perceptions of Perth among other Australians



Residents from Melbourne, Sydney and Brisbane view Perth quite **homogenously** and see Perth as having the **same relative** strengths and weaknesses as Perth residents.

However, these external domestic audiences see Perth **less positively** than Perth residents.

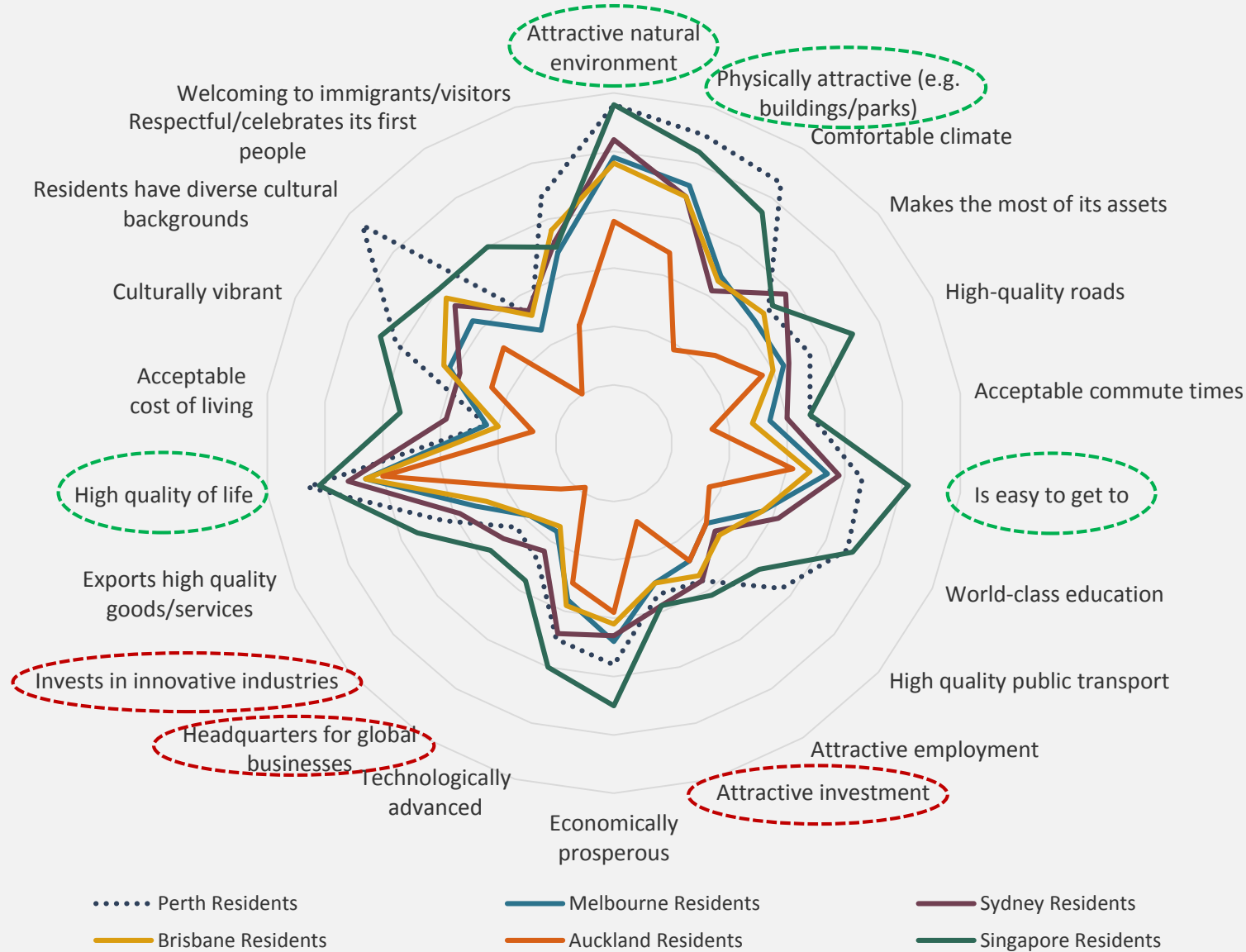
Perceptions of Perth among Auckland residents



Auckland residents are the **least familiar** with Perth with high levels of uncertainty.

They do however, see Perth as having the **same relative** strengths and weaknesses as Perth residents.

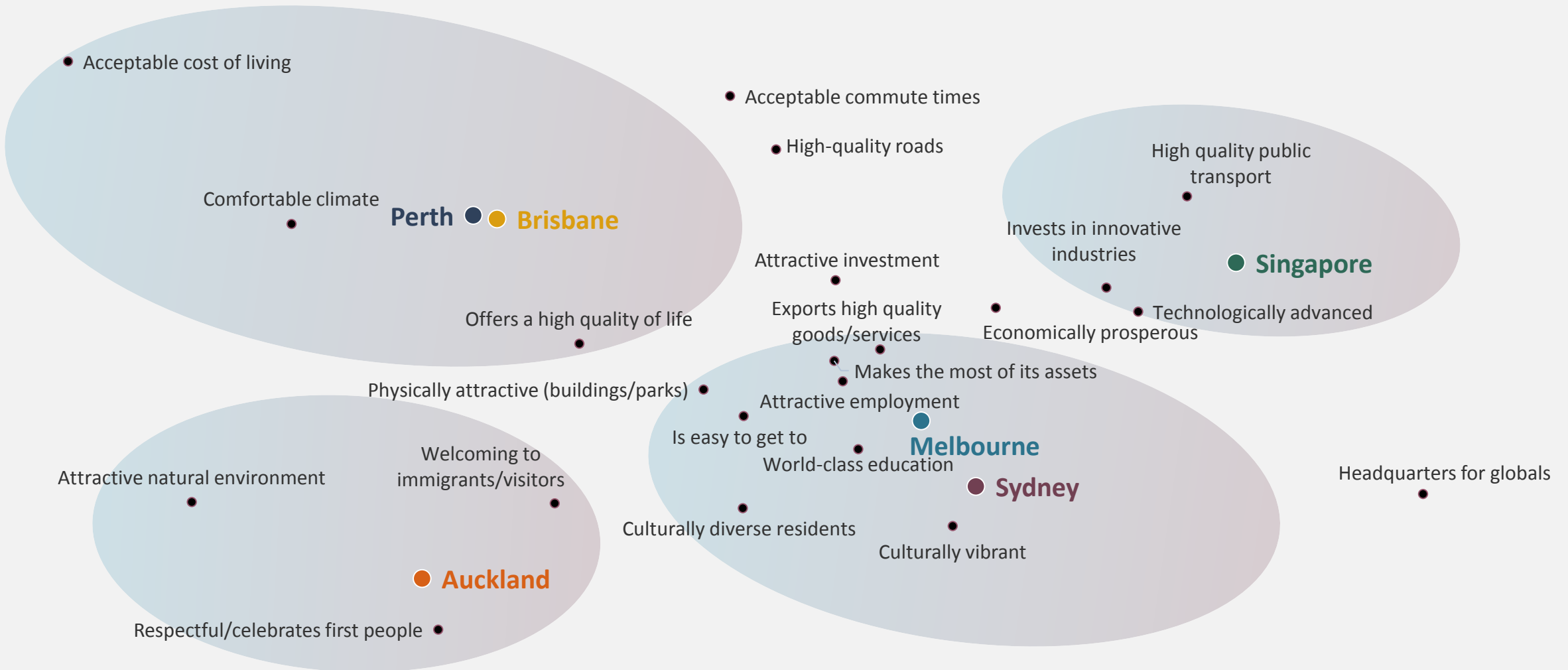
Perth's brand footprint across the six markets



Perth's top performing attributes are consistent across markets...

...as are its weaknesses.

Perth's positioning compared to other cities



Q8. How would you rate each of these cities/ places on each of the following attributes.

BASE: Total sample, aware of Perth n=2,499, aware of Melbourne n=2,516, aware of Sydney n=2,509, aware of Brisbane n=2,495, aware of Auckland n=2,483, aware of Singapore n=2,499

**What is the impact
of experience with
Perth on its
reputation?**

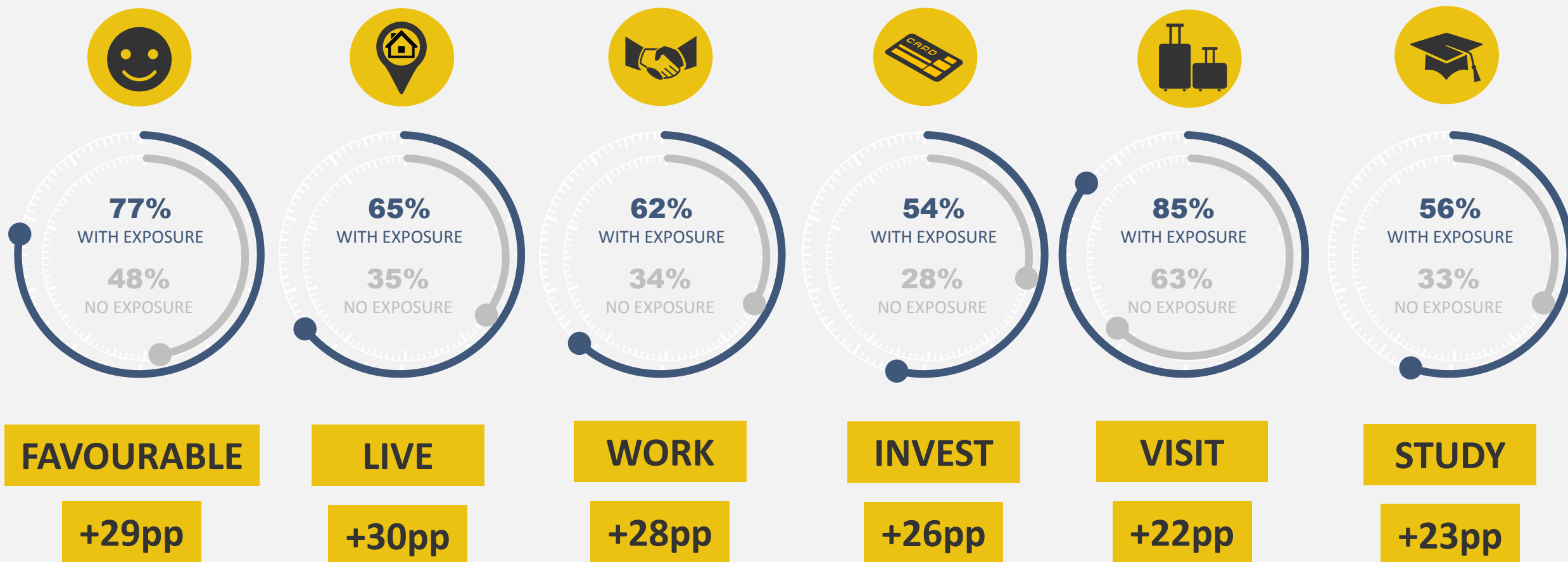


GAME CHANGERS



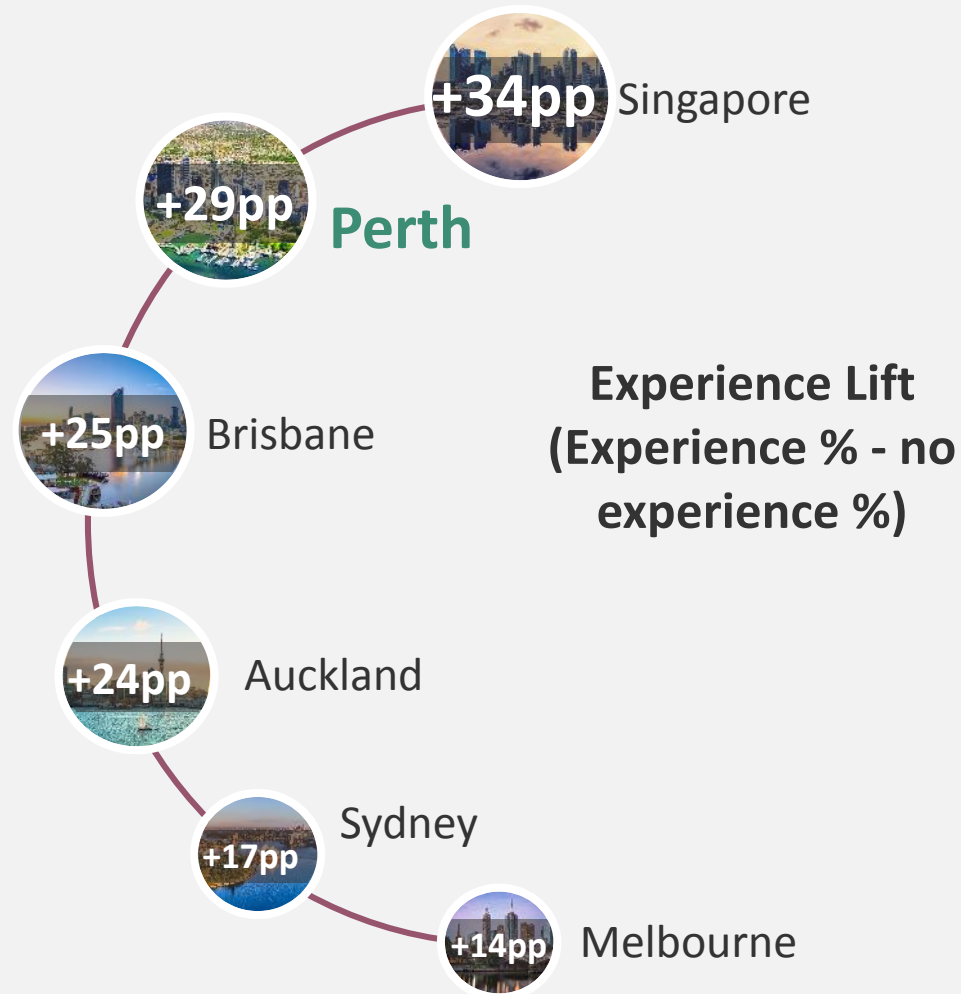
Strengthening Perth's reputation is about growing experience

Those who have experienced Perth are more favourable towards it and more likely to recommend it across every activity, with the greatest lift seen in regards to living in Perth.



Perth's lift from experience is greater than that of other cities

This reputational lift achieved from exposure is higher for Perth than other Australian cities, but behind that of Singapore.



Favourability ratings among those who have experience with Perth are on par with ratings of Melbourne and Singapore among those who have experienced each.



Q4. Favourability | Level of Exposure by city

BASE: Panel Sample n= 2,527. Perth residents n=600, Melbourne Residents n=385, Sydney Residents n=385, Brisbane Residents n=385, Auckland Residents n=387, Singapore Residents n=385

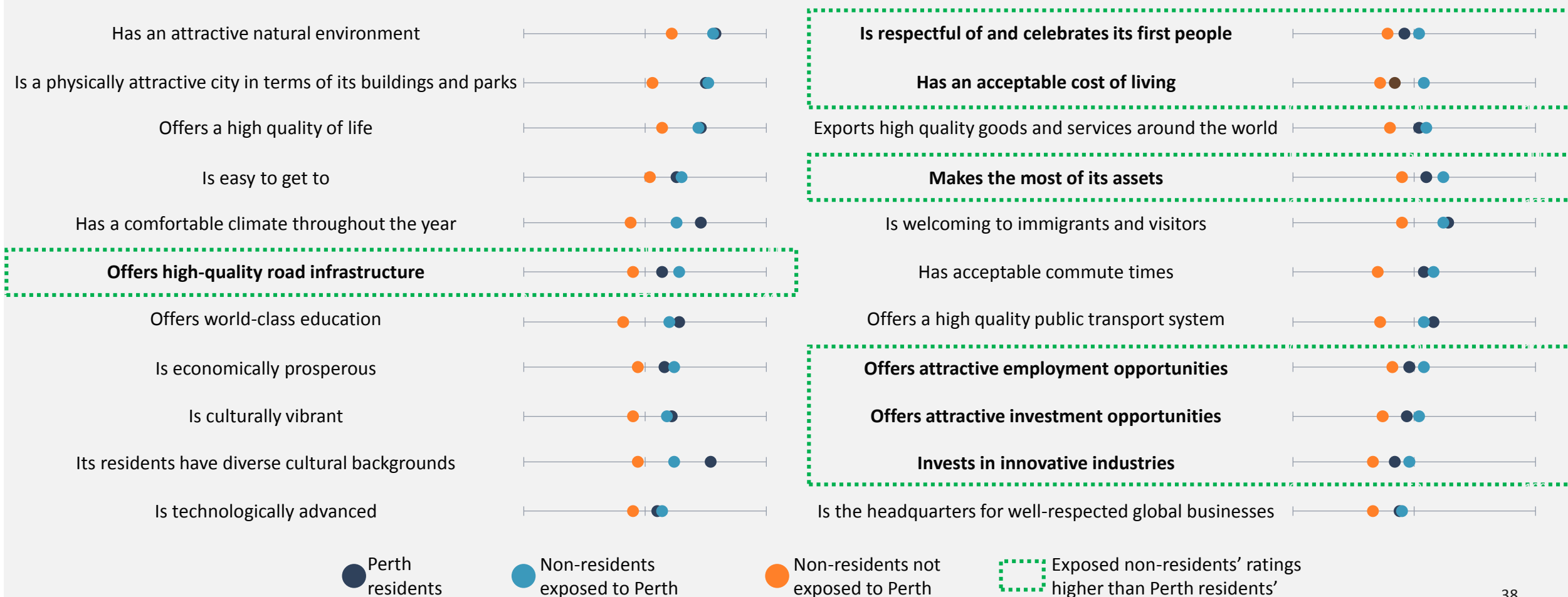
Perth's reputational challenges are in perception, not reality

Consistently, those with no actual experience of Perth rate it weaker across the attributes than those with actual experience of the city, suggesting perceptions are poorer than reality.



Experience can make non-residents even more positive than those who live here

Across seven attributes, non-residents with actual experience of Perth rate the city's performance more positively than those who live here.



But experience with Perth is lower compared to other cities

Experience with Perth amongst non-residents is significantly lower than experience with Sydney, Melbourne and Brisbane, meaning Perth's reputation is not getting the full benefit of the lift associated with experience.



**Where does Perth
need to focus its
efforts to improve
reputation?**



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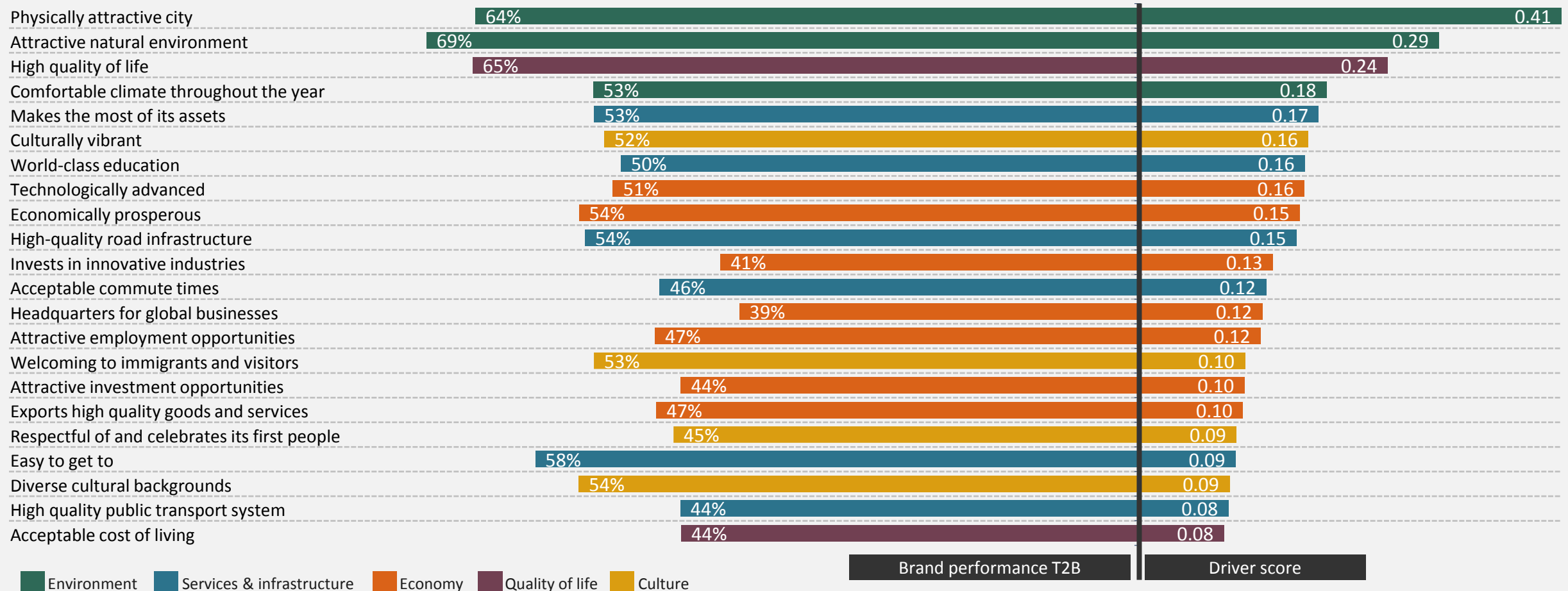
DRIVERS OF PERTH'S FAVOURABILITY AMONG **NON-PERTH** RESIDENTS

Favourability towards Perth is driven by its traditional narrative and is unidimensional making the city vulnerable.

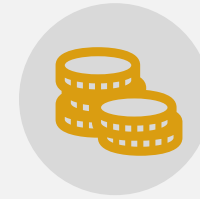


DRIVERS OF PERTH'S FAVOURABILITY AMONG NON-PERTH RESIDENTS

Perth already performs well across its top two drivers of favourability, meaning it faces diminishing returns. It is more important for Perth to diversify its favourability and understand what drives consideration.

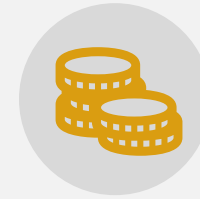


TOP DRIVERS OF CONSIDERING PERTH FOR NON RESIDENTS



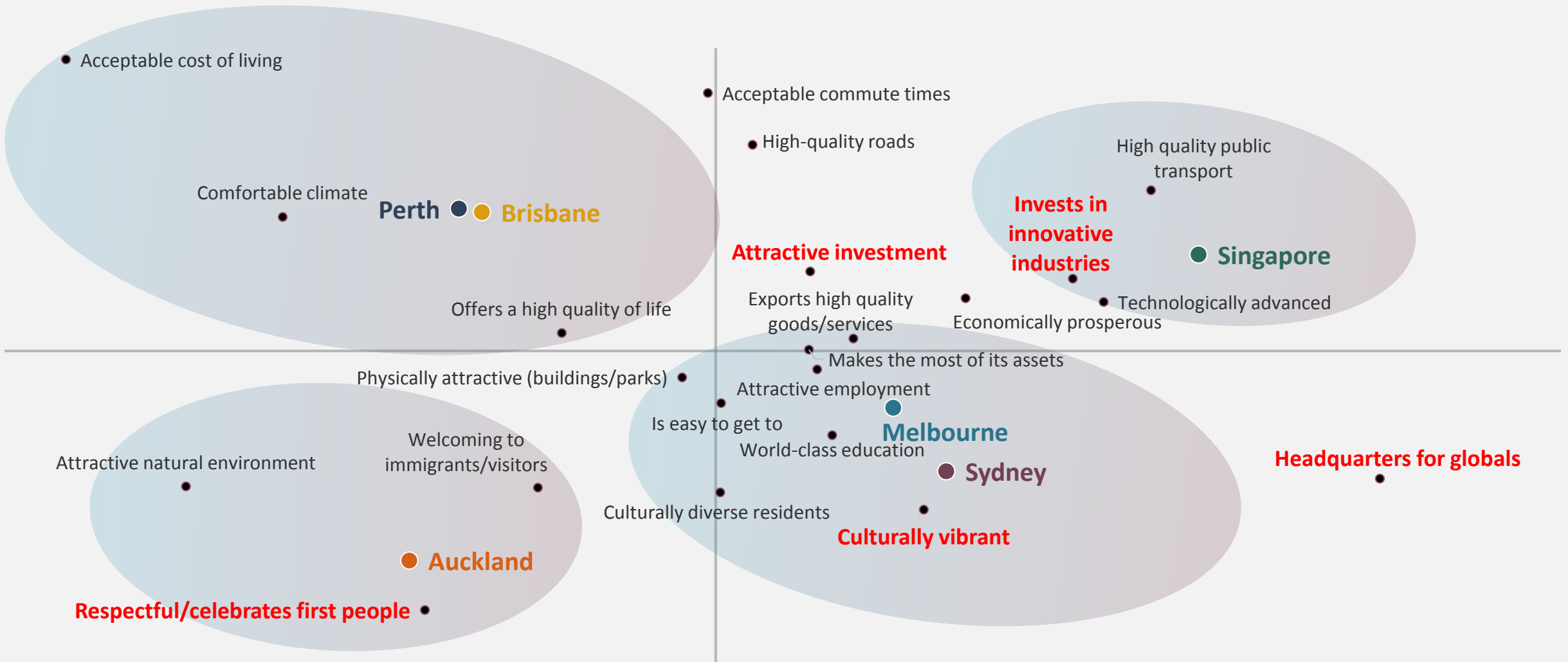
	LIVE	WORK	STUDY	INVEST	VISIT
#1	Attractive investment opportunities (44%)	Attractive investment opportunities (44%)	Attractive investment opportunities (44%)	Attractive investment opportunities (44%)	Physically attractive city (64%)
#2	Headquarters for global businesses (39%)	Attractive employment opportunities (47%)	Headquarters for global businesses (39%)	Invests in innovative industries (41%)	Attractive natural environment (69%)
#3	Comfortable climate (53%)	Headquarters for global businesses (39%)	World-class education (50%)	Headquarters for global businesses (39%)	High quality of life (65%)
#4	Invests in innovative industries (41%)	Invests in innovative industries (41%)	Invests in innovative industries (41%)	Acceptable cost of living (44%)	Is culturally vibrant (52%)
#5	Is respectful of and celebrates its first people (45%)	Is culturally vibrant (52%)	Is respectful of and celebrates its first people (45%)	Is culturally vibrant (52%)	World-class education (50%)

TOP DRIVERS OF CONSIDERING PERTH FOR NON RESIDENTS



	LIVE	WORK	STUDY	INVEST	VISIT
#1	Attractive investment opportunities (44%)	Attractive investment opportunities (44%)	Attractive investment opportunities (44%)	Attractive investment opportunities (44%)	Physically attractive city (64%)
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#5	Is respectful of an celebrates its first people (45%)	Is culturally vibrant (52%)	Is respectful of an celebrates its first people (45%)	Is culturally vibrant (52%)	World-class education (50%)

PERTH IS NOT STRONGLY ASSOCIATED WITH THESE IMPORTANT ATTRIBUTES, OTHER CITIES OWN THEM



Q8. How would you rate each of these cities/ places on each of the following attributes.

BASE: Total sample, aware of Perth n=2,499, aware of Melbourne n=2,516, aware of Sydney n=2,509, aware of Brisbane n=2,495, aware of Auckland n=2,483, aware of Singapore n=2,499

KEY FOCUS AREAS TO IMPROVE PERTH'S REPUTATION

Develop strategies
to improve
perceptions re:

**Attractive
investment
opportunities**

**Headquarters
for global
businesses**

**Invests in
innovative
industries**

**Is respectful of
and celebrates
its first people**

**Is
culturally
vibrant**

Activate Perth residents as stronger advocates for their own city.

Expand and diversify the current narrative that focuses on natural beauty (and sometimes reverts to the 'dullsville' rhetoric) to include the newly identified key themes, with a focus on Perth's education and investment offers.

Understand why Perth's business influencers aren't advocating.

Perth influencers are less likely than those from all other cities to recommend their home city as a place to invest. This needs to be understood and strategies developed to overcome it. Also look for lessons from those who have invested in the past and external influencers who see Perth as on par with Melb/Syd, and more appealing than Brisbane, Auckland and Singapore.

Increase experience with Perth.

With a +29pp gap between perceptions and reality, Perth can realise significant reputational gain by increasing experience. Perth currently underperforms on levels of experience compared to the other key cities meaning potential reputational gains are being left on the table.

Ensure tourism strategies complement live/work/study/invest strategies.

Drivers of tourism are mostly distinct from drivers of live/work/study/invest but given the critical role of tourism in improving perceptions of Perth, it is essential that any tourism strategies complement live/work/study/invest strategies. All strategies need to work together to dial up into a more diverse view of Perth that overcomes current poor performance across the most important attributes.



Thank you.

Sally Braidwood

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