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Demand- and supply-side perspectives of city branding: A qualitative investigation

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Demand- and supply-side perspectives of city branding: A qualitative investigation

Abstract

City branding has become an invaluable source of differentiation for cities around the world as competition between places continues to grow. The current study addresses gaps in extant city branding literature by investigating the brand vision model on a second-tier UK city, Leeds, from the perspective of both brand steerers and brand consumers. The qualitative research approach and case study results from brand steerers and consumers reveal that a high degree of buy-in exists among leading brand steerers. Furthermore, findings indicate some significant differences between the steerers and citizens' vision for the city's brand that prevents the two sets of viewpoints from being strongly aligned; although communalities exist between stakeholder groups, the supply side is taking a more strategic direction whereas the demand side is more pragmatic. Managerial and theoretical implications provide practical recommendations for managers as well as broader suggestions for the research area in general.

Keywords: place branding, city branding, brand vision, case study, focus group

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1. Introduction

With prominent cities such as London, New York and Amsterdam allocating substantial resources towards branding (Braun, 2012), tourism destination marketers and city planners are becoming increasingly conscious of the branding concept (Ekinci, Sirakaya-Turk, & Preciado, 2013; Hultman, Skarmeas, Oghazi, & Beheshti, 2015; Kavaratzis, 2004). Along with this trend is increased scholarly attention to what academics describe as city branding: branding and marketing cities to (potential) residents, visitors, and investors (Merrilees, Miller, & Herrington, 2009). Academics have examined many issues, including city brand image and personality (Hosany, Ekinci, & Uysal, 2006), residents' brand attitudes (Merrilees et al., 2009), branding implications for satellite cities (Merrilees, Miller, & Herington, 2013) and frameworks for effective city branding (Kavaratzis, 2004).

Despite this breadth, exciting opportunities remain. The literature suggests that cities realize the benefits of branding via an integration route connecting city brands with key targets and stakeholders (Kavaratzis, 2004). Integration requires a close fit between stakeholders' physical and psychological needs, and the city brand's own functional and symbolic attributes (Hankinson & Cowking, 1993). However, city branding research emphasizes a top-down branding strategy bias placing city planners at the top and from where researchers study their roles as influencers of local stakeholders' brand perceptions (Kavaratzis, 2004). If stakeholder buy-in is critical to realize a city's brand aspirations (Braun, Kavaratzis, & Zenker, 2013), an even more critical concern should be whether there is and should be congruence between the supply and demand sides of city brand visions. In other words, do demand and supply side visions converge on critical indices such as the envisioned future for the city brand?

Closely related is lack of research into understanding city brand administrators' dual roles as audience and stakeholders. Being residents or, at least, visitors themselves, city brand administrators occupy both the supply and demand sides of the city branding equation and are thus exposed to opposing (converging) forces. If different stakeholders can have different brand aspirations (Merrilees et al., 2009), understanding brand administrators' brand attitudes constitutes an important first step in defining the extent of advocacy that should accompany city branding. In other words, where disparities exist between brand administrators' own brand perceptions and the articulated vision, there may be a need for internal brand advocacy at the administrator level. More critically, such incongruence may have far reaching implications for the ability to gain external stakeholder buy-in.

Lastly, with deepening globalization, smaller cities have a heightened need to enhance their visibility through image management (Judd, 1995) and niche creation (Markusen & Schrock, 2006). While bigger cities must also manage these factors, evidence suggests that the case for smaller cities may be more nuanced. For instance, compared to top-tier cities, second-tier cities are unique in terms of their residents' behaviors, attitudes, and values (Frideres, 2006). The current literature does not explore how these unique characteristics of the city brand visioning process and its implications.

To help resolve these issues, this study combines De Chernatony's (2001) brand vision model with a case study approach to assess stakeholder attitudes towards a second-tier UK city, Leeds. Specifically, the study explores the supply and demand side visions for the Leeds city brand emphasizing its objectives, values, and future. By supply and demand side visions, the study refers to current and aspirational views of the Leeds brand among brand administrators (supply) and brand targets (demand). The supply-side elements include local authorities, visitor and conference bureaus, and tourism organizations (Bramwell & Rawding, 1994), whilst the demand side encompasses all of the city's current and potential users (including residents, tourists, and businesses) (Braun, 2012).

This study therefore offers several contributions to the literature. By exploring parallels between supply and demand side visions of the Leeds city brand, the study brings a holistic picture to the discourse on stakeholder engagement in the city branding process. This enables a dual perspective on the key issues in brand visioning that highlights the key considerations for brand advocacy. The evidence from a second-tier city also offers fresh perspectives in this regard. In addition, by examining the brand vision perceptions of city brand administrators, the study breaks new ground by incorporating them as bona fide brand targets with brand attitudes. To the extent that their brand attitudes may coincide with or contradict their decision roles, understanding brand administrators' vision is critical for city brand advocacy, buy-in, and delivery.

2. Conceptual background

2.1. City Brand Vision

Brands are arguably an organization's most powerful asset. Brands ensure that stakeholders can distinguish between market offerings and make them attractive. Brands thus represent opportunities for profit as firms can leverage their benefits (Lindemann, 2010; Murphy, 1990). To deliver the benefits of distinctiveness and attractiveness, however, brands must be vision-driven with "clear direction that people can understand, embrace, and follow passionately" (Mathieu, 2005, p. 13). According to De Chernatony (2001), this vision presents a strategic intent for the brand that must appear exciting to stakeholders and generate enthusiasm. The brand vision thus becomes the platform for consumers' engagement with the brand.

For destination and city branding, brand vision management means managing perceptions to influence mental maps about a place and to tie them to targets' present and future needs (Kavaratzis & Ashworth, 2006). Earlier city branding discourse had disagreements on whether cities have product characteristics that make them amenable to branding (Skinner, 2008; Virgo & De Chernatony, 2006). More recent discussions, however, tend to converge around the notion that places are akin to corporate brands (Merrilees et al., 2013) in that they are subject to multiple stakeholder interests. As such, both corporate and city brands are complex and have dense constituencies (Kavaratzis, 2004), which for the latter includes leaders, investors, residents, employees, and customers. In addition, city brands carry additional complexities arising from the associated political and public interest factors (Ashworth, 2008).

Braun (2012) links political and public interests to the governance setting in which city branding occurs, and argues that city brand administrators' understanding of the brand and the political priorities behind their decisions are fundamental to achieving brand coherence. However, because city branding is a network-led process representing public-private synergies, a common vision across stakeholder groups is critical. If stakeholder buy-in is integral to branding (Kotler, Asplund, Rein, & Haider, 1999), then understanding supply and demand side visions for city brands is central to gauging the extent of shared vision and buy-in.

To understand brand vision, scholars have developed several brand analysis frameworks. Kavaratzis's (2004) city image communication model that tracks the use of a layered communication system to build images that feed into desired city visions. Anholt (2006) uses a brand hexagon framework suggesting that the essence of a city brand lies in its physical attributes, pulse, presence, potential, people, and perquisites. There is also Hildreth's

(2008) city brand barometer that provides criteria for measuring city brands' strength, and finally De Chernatony's (2001) brand vision model.

This study adopts the De Chernatony model because enables an analysis of the vision construct as applied to city brands. According to Virgo and De Chernatony (2006), the complex nature of city brands creates the potential for multiple (competing) visions that only serve to dilute and weaken the strength of the city brand. The De Chernatony (2001) brand vision model presents a three-pronged approach to assess and build successful brand visions strategically. In proposing the model, De Chernatony emphasized the role of visionary leadership to transfer the conceived brand vision across stakeholder groups to reach congruence.

According to the model, a brand's vision comprises stakeholder perceptions of the brand's purpose, values, and its envisioned future. First, a brand's vision lies in the stakeholders' associations with its current status related to how they perceive the brand's values. Second, brand vision emphasizes a purpose (i.e. the brand's intended benefits and its promise to stakeholders). These two components then feed into the envisioned future environment (outlining perspectives on the brand's desired state over a ten-year span) (De Chernatony, 2001). Because brand vision perceptions vary across stakeholders, gauging levels of (in)congruence across groups requires a model that enables a comparison of identifiable vision elements. Accordingly, the current study adopts the three-pronged components of the De Chernatony (2001) model (see Figure 1) as the framework to compare supply and demand side brand visions.

- Fig. 1 here –

3. Methodology

This study's case city, Leeds, is the second largest metropolitan district and the third most populous local authority in the UK (BBC, 2014). As the UK's fastest growing city, Leeds' £56 billion economy supports a population size of three million. Outside London, Leeds is the largest center for financial services with a growth forecast of 25% in the next decade. More than £3.8 billion was expended on large-scale development projects in the last decade with a further £5.5 billion of current investment in construction (Leeds City Council Website).

In 2011, the Leeds City Council launched a new vision for the brand, with the intent to become "the best city in the UK by 2030." The city plans to cultivate open, fair, and welcoming communities characterized by prosperity and sustainability to realize this vision. The vision is interest-driven, as stakeholder consultations showed that people cared about community and society as much as the infrastructure and buildings (Leeds City Council, 2011).

However, this vision does not exist in a stakeholder vacuum, and has been the subject of some discontent. For instance, a year after adopting this new vision, a local entrepreneur criticized Leeds' branding efforts for its lack of recognizable positioning (Yorkshire Evening Post, 2012). Given the potential disparities between the supply and demand side perceptions of the Leeds brand, Leeds presents an interesting empirical setting to gauge brand vision congruence among differing stakeholder groups. Merrilees et al. (2009) pursued a similar line by examining the brand perceptions among various resident stakeholder groups. However, the sample stratified by residential hubs did not provide any insights from city brand administrators. The current study tackles this shortcoming by incorporating brand vision perspectives from both brand administrators and consumers.

A multi-method data collection procedure was used to capture both perspectives of the Leeds city brand. A qualitative empirical data collection approach was used given the study’s interest in exploring city brand visioning, an otherwise, neglected construct in the city branding literature. To explore the supply-side perspective, the researchers first conducted comprehensive desk research on the Leeds city brand. The procedure generated a considerable amount of archival data on the Leeds brand development process from both official documents and mass media. Thereafter, the researchers conducted four key informant semi-structured face-to-face interviews with brand administrators, including the Program Manager (informant 1), the Assistant Chief Executive (informant 2) at Leeds City Council, the Managing Director for Asia Pacific (informant 3), and the Head of Stakeholder Strategy and Communications (informant 4) at Leeds & Partners. Leeds & Partners was established to actualize the new city vision by attracting jobs and investment to the city. The informants had multiple years of experience working with city brand development in general, and the Leeds brand in particular, in both strategic and executive capacities. The interviews lasted between one and two hours each and covered the city branding process, the brand vision model, and future objectives. A semi-structured interview guide was developed prior to the interviews, and all four interviews were recorded and later transcribed.

To capture the demand perspective, two focus groups with a varied sample of Leeds residents were undertaken. To ensure a variety of perspectives, one focus group (FG1) consisted of Leeds natives and the other group (FG2) contained foreigners living in Leeds. Both focus groups had five members each. FG1 had two female and three male discussants, had an 18-69-year age range (mean: 46.4), and various occupations (bartender, D1: M18; unemployed, D2: F43; salesperson, D3: M45; shop assistant, D4: M57; and retired, D5: F69). The second focus group had the same gender ratio but was less varied in terms of age (range: 22-28, mean: 24.4) and consisted of students at different levels originating from India (D6: F22), Belarus (D7: M23), Thailand (D8: M24), China (D9: F25), and Japan (D10: M28). FG2 participants had lived in Leeds for an average of one year. Participant demographics corresponded well with that of the Leeds population given its service-based economy.

The data were analyzed using Miles and Huberman’s (1994) reduction logic and matrix approach. This entails data reduction via coding and the development of within- and cross-case thematic nodes. Using the broad themes derived from the main research question, that is, related to suppliers’ and city brand consumers’ brand vision perceptions, and levels of (in)congruence, codes were assigned to parts of transcribed texts from interviews and focus groups. As such, using the De Chernatony (2001) brand vision framework, four thematic nodes served as the basis to compare supply and demand side perceptions about the Leeds brand. The first three covered the three elements of the De Chernatony (2001) framework (envisioned future, brand purpose, and brand values) while the last explored points of agreement and disagreement.

4. Findings

4.1. Envisioned future for Leeds

From the supply side, the envisioned future for the brand is to become the best city in the UK. Informants focused on making Leeds internationally visible based on the notion that major cities are judged on their attractiveness to international firms (informant 3). In the interviews, informants envisioned a future where Leeds hosts events and activities targeting international audiences. Local monuments and monumental events are a key in this process. For informants cited Leeds as the starting point for the 2014 Tour de France and strategic infrastructure such as the new 13,500 capacity indoor arena (First Direct Arena) as new opportunities to raise the city’s profile. Others include the construction of a new shopping center (Trinity Leeds, the largest development of its kind in Europe), which seeks to confirm the city as an international retail hub.

To actualize this dream, which informants 1 and 2 described as ambitious but realistic, planners aim to leverage such major facilities to attract international events. “We need to get more into this sort of thing, more global and international events will take place through Leeds in the future” (informant 3). Thus, for brand administrators, the envisioned future of Leeds as the best UK city lies in an increased internationally recognized profile. Not surprisingly, Leeds has recently hosted the 2015 Rugby world cup, the 2015 Music of Black Origin (MOBO) awards, and several other international events, confirming its drive towards internationalization and global recognition.

Where the envisioned future of Leeds from the brand supplier side displays an internationalization bias, the demand side vision is more functional in nature. Focus group discussants envision a future for Leeds characterized by improved infrastructure and city center expansion. As one discussant declares, “I would expect to see many of the unattractive, empty spaces in the city center disappear due to the new developments which are planned as the city center continues to grow” (D3). In addition, they want a better, internationally connected Leeds where its regional airport offers more flight options and better connections to the city center. In a way, this vision matches the supply side vision of internationalization. Discussants highlighted another area of vision congruence in terms of the Tour de France, First Direct Arena, and Trinity Leeds as critical elements to shape the future of Leeds and called for more events targeting international elements within the Leeds community. For instance, the Chinese and Thai discussants in the second focus group (D8, 9) wanted more focus on East Asian cultural events, while others wanted more events such as international film and food festivals, something that the city is currently doing.

Overall, key similarities appear to exist between supply- and demand-side visions for the future of Leeds. However, there are fundamental differences in terms of the main focus area: infrastructure-based development versus internationalization-driven processes.

4.2. Brand Purpose

Within supply-side circles, Leeds is implementing a “One Voice” strategy that breaks the grand vision into five areas, each with its own targets and performance indicators. These areas target health and wellbeing, children and young people, business, communities, and to become the best city to live in. Overall, this brand purpose aims to ensure that the brand is associated with inclusiveness and general wellbeing. According to informant 1, Leeds must remain attractive to young people as an optimal work and residential destination. The city brand also aims to deliver sustainable and holistic benefits in each of these areas “We have been criticized in the past, as a city, for moving things forward in certain areas of Leeds *whilst other areas get left well behind… yo*u have got to do something about that widening gap” (informant 3). Apparently, a greater level of equality would result in more buy-in for the brand’s vision, highlighting that satisfied residents “can be ambassadors and do some of the work for you” (informant 3).

The demand side stakeholders held a general consensus that Leeds is more inclusive of some groups than others. However, they feel that while young people have numerous opportunities for upward mobility, older people, especially those with little experience, are limited. As an FG1 discussant (D4) mentions, this is a simply a reflection of general UK trends, stating that Leeds is, “probably better off than many major cities when it comes to finding work.”

Non-indigenous participants also pointed to the apparent lack of inclusiveness. Specifically, they sought more opportunities for engagement with the city beyond its center, expressing the view that visitors and other non-permanent residents generally lack awareness of what lies beyond the city center, denying them a richer experience with entire city.

4.3. Brand Values

Along with brand administrators' vision for Leeds as internationally recognized destination, the values expressed across their interviews center on the idea of the city as "global." Informant 4 highlights the "multicultural" nature of the Leeds population as a basis for this association. Informant 2 also cites ongoing improvements to the Leeds/Bradford International Airport and the proximity of two other international airports (Sheffield and Manchester) as examples of "international accessibility." According to Informant 4, this associates the Leeds brand with a sense of connectedness. Informants also associated Leeds with excellence, a situation they mainly attribute to its strong and visible higher education system. With three universities, some perceive Leeds as a center of excellence and a major contributor to an "innovative" and "*skilled"* workforce.

The demand side participants associated values such as "dynamic," "vibrant," "multicultural," and "accessible." Citing the many events hosted in the city over the year, the focus group discussants saw Leeds as upholding vibrancy as a strong value. As one discussant (D2) summarized, this vibrant feel renders a "current and ever-changing" tone to the Leeds brand. In addition, multicultural associations drawn from the cultural nature of most of these events, including the German Christmas Market and the West Indian Carnival that draws people of different cultural backgrounds.

Further demand side insights associated the city brand with accessibility. According to the focus groups, the city's geographic location enables easy access to other parts of the UK, especially Scotland. While this seemingly ties in with the supply side association of Leeds with (international) accessibility, there were inherent differences in values. For the demand side, Leeds' association with accessibility refers to other UK cities as opposed to the supply side's external focus.

4.4. Brand vision buy-in among brand administrators

Overall, the four brand administrators appeared convinced about the Leeds brand and its vision prospects. All interviewees noted the significance of creating strong city brands in the wake of increased global competition. As such, there is a strong drive towards an internationalization posture in marketing the Leeds city brand, though all informants admited that Leeds has been slow to realise the benefits of such a posture. As one suggests, Leeds could even be criticised for “not punching its weight,” adding that Leeds “has suffered by being eclipsed by other [UK] cities” (Informant 1). The study also finds strong buy-in to the notion of targeting Leeds to an international audience as an attractive destination for large businesses and events.

4.5. Perceptual congruence between the supply and demand sides

In terms of gauging the level of congruence between the supply and demand side brand perceptions, the study finds broad overlaps, although the commonalities operate at different levels. The supply-side is strategic in their rendering of the city brand and its associations, while demand side perceptions focus on a more functional brand. The future environment envisioned for Leeds has the most perceptual congruence across the two divides. Both the supply and demand sides’ views converge on the notion that the Leeds brand has positive and exciting prospects. The most common reasons cited across the two groups for this perception, included recent developments and high profile events deemed crucial to city’s future. Both sides also shared an emphasis on the importance for Leeds to have recognition as a host city and expanding its international events profile, albeit with a stronger emphasis by the supply-side.

There were also dissimilarities in the visions. For instance, with regard to brand purpose, brand administrators appear more strategically minded whereas the customer opinions tended toward tangibility and experiences. Where brand administrators see the benefits of the city brand in its provision of better health, economy, communities, and a youth-friendly environment, brand consumers are concerned with inclusiveness for their daily experiences. Figure 2 summarizes the key associations across the two groups in terms of the values associated with the Leeds brand.

- Fig. 2 here -

The figure shows overlaps in terms of associating Leeds with a global and attractiveness mind-set. In addition, there is a sense of the city as connected or accessible. However, this is not a truly shared value as the supply-side refers to international reach while the demand-side associates such accessibility to internal UK reach.

5. Conclusions and implications

This study used De Chernatony's (2001) brand vision model to assess supply and demand-side perceptions of a city brand in terms of its espoused vision. It focused on a second-tier city, Leeds, rather than the main city branding literature that focuses on primary cites. By comparing how brand suppliers and consumers view the Leeds brand, the study finds points of agreement and variance across the groups. Overall, the perceptions of various brand vision indices indicate convergence between administrators and consumers. As such, by highlighting the relevant touch points shared with brand consumers, brand administrators should be able to build strong associations for the Leeds brand (Kavaratzis & Ashworth, 2006).

However, a closer look reveals that the points of agreement operate on different levels. The supply side was more abstract and strategic, and the demand side was more tangible and functional. For instance, brand administrators focused on the notion of "the best

UK city" as a future vision, while the demand side emphasized functional improvements in the physical facilities to enhance experiences (Wong & Yu, 2003). This finding corroborates extant knowledge that brand perceptions operate on different levels across stakeholder groups (e.g., Merrilees et al., 2009). For smaller cities, this may have far-reaching implications as it means brand strategy must account for such nuances.

As Frideres (2006) argues, the main attraction of second tier cities is the opportunity for a more inclusive policy. Where larger cities must resort to policy homogenization to cater to large population requirements and risk overlooking minority interests, second tier cities are smaller and have fewer challenges of this nature. To realize this second tier city benefit, however, this study's finding of perceptual differences across stakeholder groups shows that brand administrators must continue listening to all interest groups. As such, the Leeds city brand may need to do more to generate perceptual congruence across stakeholder groups. Importantly, this also implies that rather than targeting external stakeholders only, city branding strategy should also look inward because brand advocates may need to tackle internal stakeholders before targeting external consumers when perceptions vary within the brand decision-making apparatus.

This discussion suggests a number of recommendations to administrators of the Leeds city brand. First, and perhaps most importantly, is the need to create brand consumer touch points. Leeds city brand administrators need constant contact with stakeholders outside the branding apparatus to ascertain and incorporate their evolving vision perceptions (Hankinson & Cowking, 1993; Kavaratzis, 2004) because even where brand visioning appears thematically shared across the two divides, there can be nuances in their interpretation. As such, to integrate the two visions effectively, administrators must be able to capture those nuances to gain richer insight into what matters to Leeds brand consumers and use this to generate self-brand connections (favourable brand associations) among them (Kemp, Childers & Williams, 2012).

As this study finds, a main point of departure between the two visions is the level of abstraction and strategic orientation. Administrators of the Leeds brand need to break down the strategic intent for the brand into their functional elements so they resonate with stakeholders outside the branding apparatus. This will help them generate support for the brand by addressing external stakeholders in a language that speaks to them. Brand communication, therefore, needs to break brand policies and strategies into their most basic functional and tactical levels.

Lastly, the broader general branding literature emphasizes the need for brands to target internal audiences as the first step in effectively communicating a strong brand. According to King and Grace (2008), managing how a brand's consumers perceive the brand begins with managing employees of the brand so they can deliver the desired brand in meaningful ways. If the employees do not internalize the brand concept, they have a lower ability to deliver it to consumers through experience, thereby risking failure of any external brand-building effort (Miles & Mangold, 2004). This study finds that the brand administrators are unified in their vision perceptions. Thus, there is scope to leverage this perceptual unity to improve external stakeholder engagement and brand advocacy.

Since this study was exploratory, it has some limitations in terms of ecological validity. While the authors attempted to include varied stakeholder groups, the study's intent was to gain a broad overview of the extent of (in)congruence between supply and demand side city brand visions. The sample is limited in both size and scope, so the study's insights should be interpreted with this in mind. Further insights could come from future research attempting a larger sampling approach. A larger sample size with members from more varied backgrounds provide further opportunities to capture nuances in the supply- and demand-side stakeholder types. A second opportunity for future research lies in a comparative analysis of the issues raised herein across different types and sizes of cities. For instance, to what extent do the findings from this study apply across cultures? Lastly, while the study finds that it is possible to argue a case for congruence on the Leeds city brand vision from both the supply and demand sides, it did not attempt to examine the role of brand advocacy in shaping this. Particularly at the brand administrator level, it might be useful to understand any internal efforts to gain brand vision agreements among members of the brand decision-making group.

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Fig. 1 Brand vision model

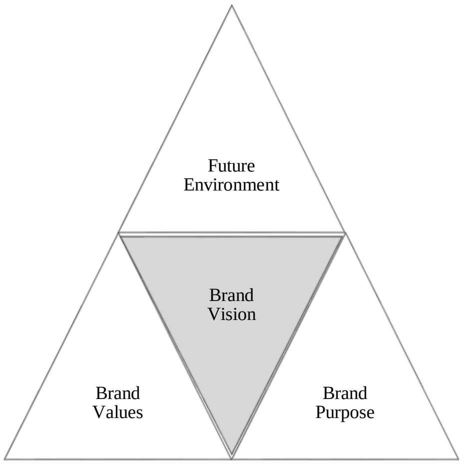

Fig. 2 Brand values associated with Leeds