Beauty Runs Deep

Benchmarking Sydney's Brand 2025

Committee for Sydney

Acknowledgement of Country

The Committee for Sydney acknowledge the traditional owners and custodians of the land on which we work and walk and pay respect Elders past and present.

About this paper

Since 2016, the Committee for Sydney has been benchmarking how Sydney compares to cities across the world. As a global city, it is important that we understand what we are doing well and what we can improve on.

In 2024, the Committee released its first benchmarking report that aligned with our six policy areas:

- Economy
- Resilience
- Mobility
- Planning
- Culture Equity & Fairness

The 2024 report was also the first in our Benchmarking series to narrow the cities that Sydney compares itself with to nine 'peer cities' that reflected cities with similar socioeconomic, geopolitical, environmental and attraction attributes.

One of the key findings of the 2024 report was the significant gap between how Sydney performs across these six areas and how it is perceived to perform on the global stage.

That insight forms the basis of the 2025 Benchmarking report – Benchmarking Sydney's Brand.

This report:

- Examines how Sydney's brand compares to cities across the world and beyond our nine peer cities through the dual lenses of perception and performance
- Identifies six brand narratives that define Sydney
- Draws lessons and insights from how other cities across the world have diversified and segmented their brands to target different audiences and markets
- Identifies the next steps for Sydney in its brand development journey.

This report has been produced in partnership with The Business of Cities.

> **"Sydney is a city where a gap exists between how we actually perform and how we are perceived to perform. Sometimes, such as in culture, this is a gap in where our performance has improved but global perceptions are yet to catch up. In others, such as resilience, we are perceived favourably but our actual performance could be better."**
>
> BENCHMARKING SYDNEY 2024

Executive Summary

Say you're from Sydney to almost anyone in the world and you'll instantly conjure up images of endless sunshine, iconic architecture and glistening beaches.

These images are the reason that Sydney is one of the most recognisable and desirable cities on the planet.

But Sydney is so much more than beaches and bridges. Our beauty runs deep, and our global brand needs to tell more than just a story of a great holiday destination. It needs to reflect our multi-cultural communities, our innovation ecosystem, our world-class investment opportunities.

As Australia's global city, we perform well across so many benchmarking metrics – all the more impressive given how far we are from the centres of North America, Europe and China.

But how we perform and how we are perceived to perform do not always align and this gap is most evident in narratives not traditionally associated with Sydney.

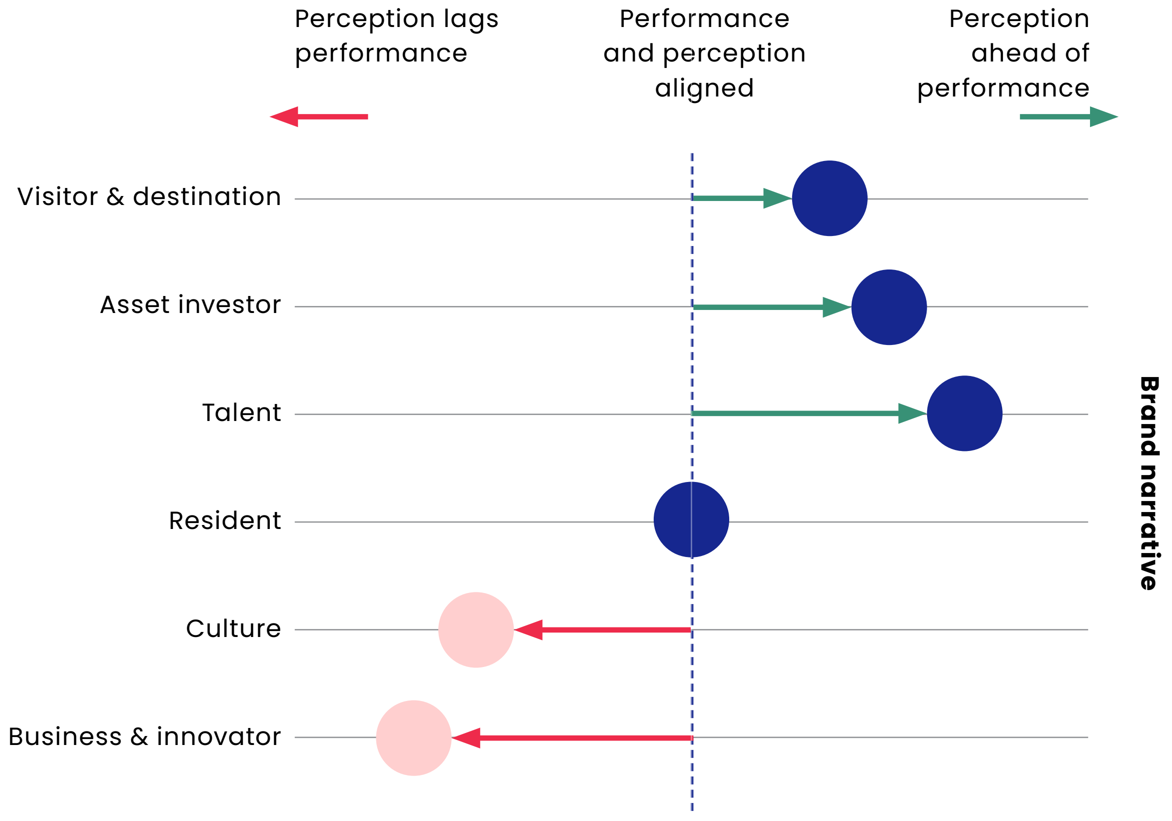
This perception-performance gap highlights the importance of a strong city brand that reflects the multiple stories a global city like Sydney should tell the world.

Many cities are now investing in their city brands and lessons from these cities are instructive for Sydney as we move into the next cycles of brand maturity.

Sydney has significant potential to develop its global brand, building on our strengths and applying the lessons from how other cities have approached brand development.

To capitalise on these opportunities Sydney needs to do take the next steps.

1. **Get the story straight.** The story Sydney tells the world about itself needs to reflect the diverse and complex city we are.
2. **Conduct the orchestra.** The messages we sent about Sydney and the communication channels we use need to align with target audiences. And these messages should be consistent so that we are all signing from the same song sheet.
3. **Collaborate to compete.** Sydney's brand cannot be wholly-owned by government because it is multi-dimensional and involves private and institutional stakeholders also. Sydney needs a public-private partnership that has carriage of Sydney's brand, and acts as a coordinating, curating and promotional body on behalf of Sydney



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The importance of brand

The rise of the city brand

For much of the 21st century to date, Sydney has enjoyed the fruits of rapid population growth in a nation with an economy that is stable and appealing. For Sydney, this chapter has been underpinned by a compelling and seductive visual identity.

Yet we are in a world of urban change. 25 years ago Sydney was one of the 60 largest population centres in the world. Even though it has been growing very strongly, with rapid urbanisation Sydney is today outside the top 80 and by 2050 may well no longer be in the top 100 (UN). Cities outgrowing Sydney include Nairobi, Hanoi, Ankara and Jaipur.

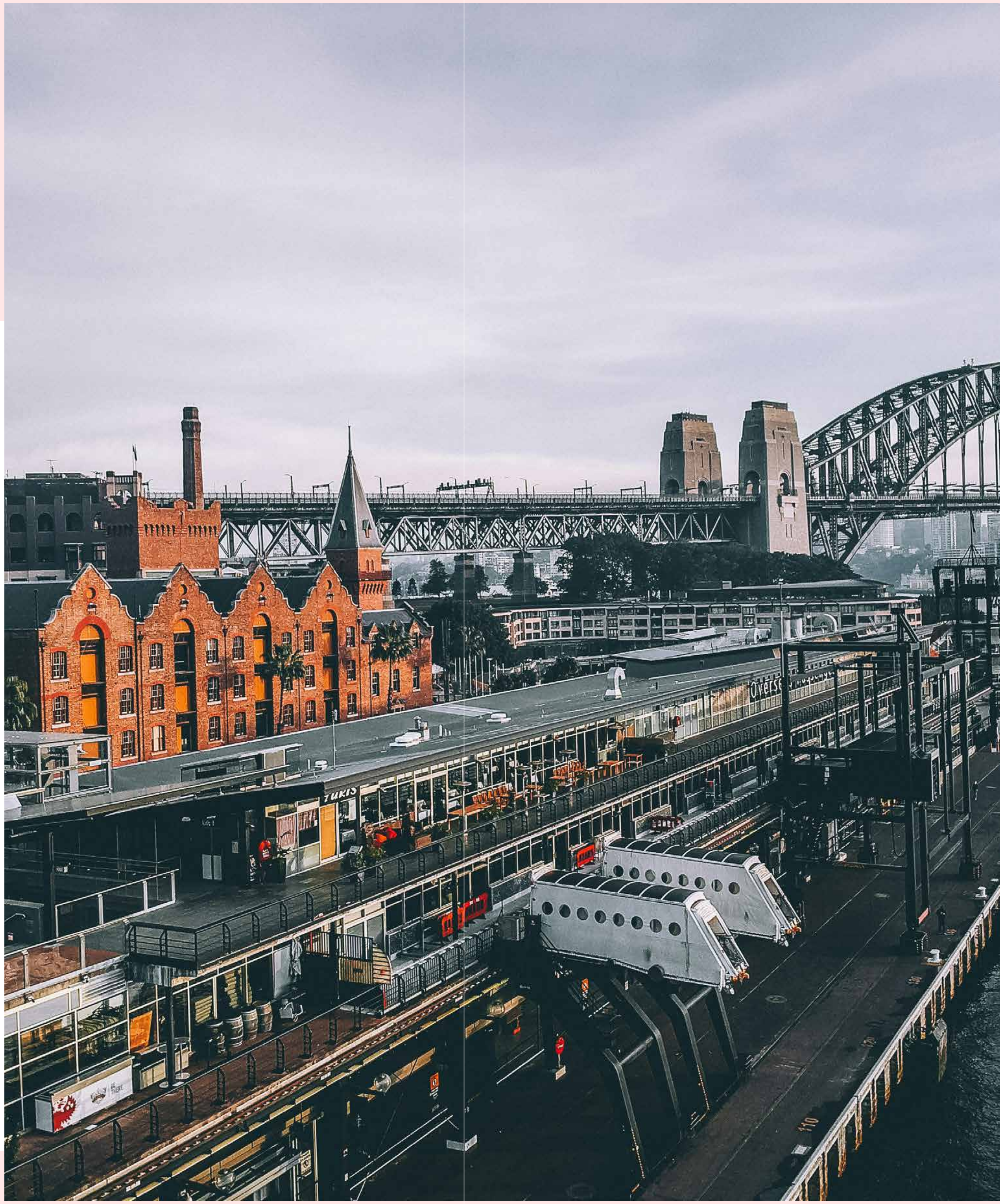
In the 20th century the thrust of competition between cities was primarily viewed through the lens of the visitor economy. But in the 21st the drivers are much more widespread.

Since 2010, 30 more cities have joined Sydney in becoming highly connected corporate hubs. The number of financial centres rated as internationally significant has doubled to nearly 120. The number of city ecosystems absorbing large amounts of venture capital has increased fivefold over the last 10 years.

Over 100 cities are at least 50% as competitive for talent as the very top talent magnets. By 2080 there will be around 1,500 cities home to over one million people, nearly all seeking their own position and purpose in markets that are inevitably international.

So Sydney is part of a continually widening landscape of cities that have more scale, international reach, and desire to innovate. These cities are explicitly and implicitly competing for finite global attention and for a host of 'customers' – be they corporates, investors, citizens, students, supply chains, talent – who have become much more 'ecosystem-sensitive' and 'place-sensitive' in their choices.

This matters for a city like Sydney that is itself continuing to grow and change fast. The city's ambitions are also framed by a limited domestic market and a powerful national brand. So there is a need to anchor and guide future growth with a clear and well-rounded sense of self.



Why city brand and identity matters

The identity imperative looms large for cities as they confront a convulsive trajectory for globalisation, technology and climate.

After the impact of the recent pandemic, urban reinvention and competition is happening in the context of an acceleration of new technologies, a host of new industrial policy responses, and geo-political conflicts and resets.

In this context a number of common themes are visible:

1. **There is an intense war going on between more cities for talent, innovation and trust.** The race is on in AI, green energy, fusion, robotics, and other areas. More cities see that they underestimate the speed and scale of this competition at their peril.
2. **Cities are battling to be defined by more than the national reputations,** frameworks and geopolitical environments that both enable and constrain them.
3. **The prospect looms of a small number of winners, 'first mover' and 'safe haven' cities,** and a larger number of 'loser' or 'follower' cities that are perceived as second choice, unattainable, or risky.

This context presents favourable opportunities for a city like Sydney to offer the "best of all worlds" – low risk, high opportunity and undervalued capability.

Yet cities know that their ability to shape current conditions to their advantage depends in large part on whether external perceptions match up.

Many cities are asking themselves:

- Does the world know what we are good at, stand for, and believe in?
- Do we express ourselves fully and authentically?
- Do we have the right teamwork to promote ourselves?
- Do we coordinate effectively with national agencies and neighbours?
- Do we match the brand with the experience and the welcome?

The answers to these questions that most cities arrive at reflect an intentionality around city brand that is increasingly the norm not the exception, especially among the most established cities. More places are able to account for the benefits of a well-managed brand identity and the accidental costs of autopilot.

The risks of neglecting brand

x no clear sense of a comparative advantage or value proposition

x multiple disparate campaigns and a confused picture.

x divided tourism marketing, investment attraction, student recruitment, or trade promotion behave as if these are separate markets that do not inform one another.

x limited impact on the intended audiences

x alienation from resident/domestic perspective

x substantial wasted resources.

The benefits of prioritising brand

✓ positions a city decisively for global opportunity and competition

✓ sense of appeal and confidence among all kinds of short-term and long-term 'customers'.

✓ helps shape a common purpose.

✓ attract opportunities in line with our vision

✓ influence and prestige that accrues on key agendas like technologies, regulation and climate change.

✓ Sense of belonging for citizens

Sydney's brand in perspective in 2025

Sydney achieves very strong scores in many existing studies of global city brands.

Their scores reveal several core drivers of Sydney's brand:

- **Familiarity and recognition**
- **Attractiveness and appeal**
- **Openness and hosting ability**
- **Credibility and stability**

Brand awareness

The world knows Sydney and believes it to be well regarded. Sydney rates an exceptional 2nd globally when the global public is asked how strong the overall reputation of the city is like. (Brand Finance) Although Sydney is only 21st for total visibility in the global online space – likely a function of scale - it is in the top tier for raw name recognition. It has been in the 3 most admired cities since 2017. (Anholt-Ipsos, 2022)

A magnetic place

Urban lifestyle is Sydney's essential brand signal. It is rated world no. 1 for Place – when people are surveyed for perceptions of the natural or built environment. (Anholt) Its strongest scores are for Liveability (2nd) (BF), and 3rd for the core public amenity and services prerequisites. (Anholt). With other cities especially in North America finding it challenging to maintain upkeep after the pandemic, surveys show Sydney is up 6 places to 8th for perceived satisfaction with urban cleanliness (Mori Memorial).

A warm welcome

When the global public have been asked to think about whose locals are friendly, Sydney's people are rated No.1 among top global cities (Anholt). Sydney routinely rates top 10 for personality characteristics, from cordiality to energy. (BF)

This cachet helps Sydney to be consistently rated in the top 10-15 cities to live in among subjective studies. (Monocle)

Unmissable for short-term visitors

Lifestyle attributes underpin Sydney's visitor credentials. The city has risen up to the top or near the top of several Best City surveys among travellers or travel professionals. (Conde Nast; Telegraph). It is also regularly among the top 5 cities to travel to for women and older travellers (BH, IM)

Sydney's star shines as a recommended place for meetings and events, (American Express), and the city maintains a top tier sports reputation. (Burson)

Assets to invest in

For investors and developers of real estate, Sydney regularly gains top 10 ratings for most investable cities (Business Wire). Sydney's reputation has been improving among Asia-Pacific investors since pre-pandemic, across several asset classes (CBRE). Sydney's consistency over the last 10 years as a place to both develop physical assets and achieve returns, has lent it a 'safe bet' status. (PwC/ULI)

Together these tell a very strong but largely superficial story about Sydney.

"Its stunning harbour and iconic landmarks contribute to this"
BRAND FINANCE

Brand reviews of Sydney

These audience perceptions shape the prism through which city brands have typically been measured and understood. Positive perceptions of Sydney in these domains have cemented, seeing global top 10 of 'best cities' by Resonance for the first time.

"Sydney combines vibrant coastal living with a thriving business environment."
SAFFRON

"Sydney unveils a dazzling narrative punctuated by the luminous Opera House, the iconic Harbour Bridge"
RESONANCE

More than meets the eye

Sydney is known for its beauty, but its offer runs much deeper than visual identity alone.

For over 60 years, the vast majority of postcards, magazines, movies and social media about Sydney has centred on its iconic harbour and beaches. In 2025 well over 80% of the top 1,000 Google Images of Sydney feature either the Opera House, the Harbour Bridge or Bondi Beach.

This visual shorthand has delivered global recognition and priceless brand equity. Yet it also fences in the story of a city that is now a metropolis home to almost 6 million people, with breadth, depth and diversity.

As Sydney develops its international roles, it has an opportunity to translate its spectacular visitor and visual identity into a multi-dimensional metropolitan portrait.

Sydney's six brand pillars:

Visitor & destination brand

A city for people to visit. Not once, but again and again, absorbing our cultural diversity, myriad events, destinations and natural assets.

Asset investor brand

A city for capital to invest. Sydney is a well governed city in a stable national economy country experiencing consistent population growth.

Talent brand

A city top talent is drawn to. Sydney's industry breadth, calibre of universities, global connections and lifestyle attracts the best and brightest to study, work and put down roots.

Resident brand

A city committed to its people. Sydney is a city that its residents have pride in, and that is known for delivering for citizens with new infrastructure, amenities, technologies and civic investments.

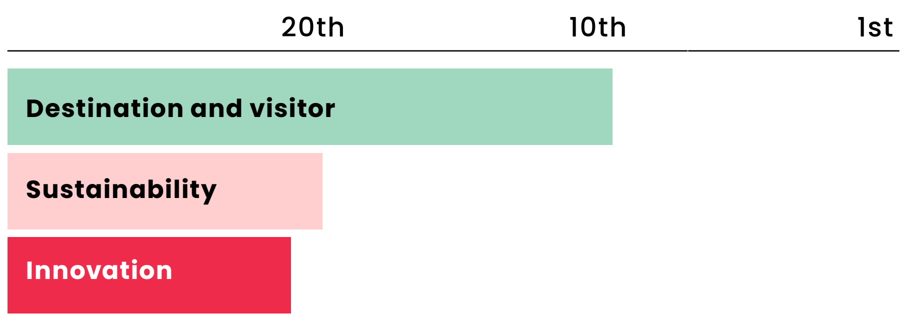
Business & innovator brand

An innovative and enabling city. Sydney is a city that nurtures innovation and provides businesses of all sizes the opportunities to start, grow and succeed.

Culture brand

A city that stages, shares and shapes culture. From nightlife to fashion, creativity, design, and live experience, Sydney is a magnet for people who enjoy and produce culture, and exports ideas that command global influence.

Recognition of Sydney's strengths in key domains (global rank)



Source: The Business of Cities research based on 100 accolades and awards in global media, 2023-present

Sydney is the 8th most frequently acclaimed city globally in accolades celebrating cities' destination appeal and visitor offer (among peers only behind Amsterdam and Barcelona). This is driven by top 5 for beaches, while being outside the top 15 globally when it comes to music and nightlife.

However, Sydney is 9th of 10 peers for frequency it is heralded for innovation, and only middle of the pack for sustainability.

Aligning perception and performance

Divergence and convergence of brand

There are two kinds of indices that capture cities on the global stage. Perception measures capture subjective beliefs and experiences about a place. Performance measures track hard-data outcomes.

Reputation and results are linked yet can often find themselves out of sync. Indeed, how Sydney is perceived and how it performs are not always aligned.

When perceptions outrun performance, cities find they risk relying on style over substance, and credibility may erode as more gaps get noticed. When performance eclipses perception, it usually means missed opportunities and undersold assets. Either way, imbalances usually incur costs.

Cities like Sydney that are competing in multiple inter-related markets find that they have to manage the perception-performance gap consciously, in order to present a credible value proposition in the areas they need to, in order to succeed.

Examining how performance metrics and perception metrics align – or not – sheds light on what a more multi-faceted approach to Sydney's brand can focus on.

An intentional approach is vital, because in Sydney, perception diverges from performance more than in most global cities.

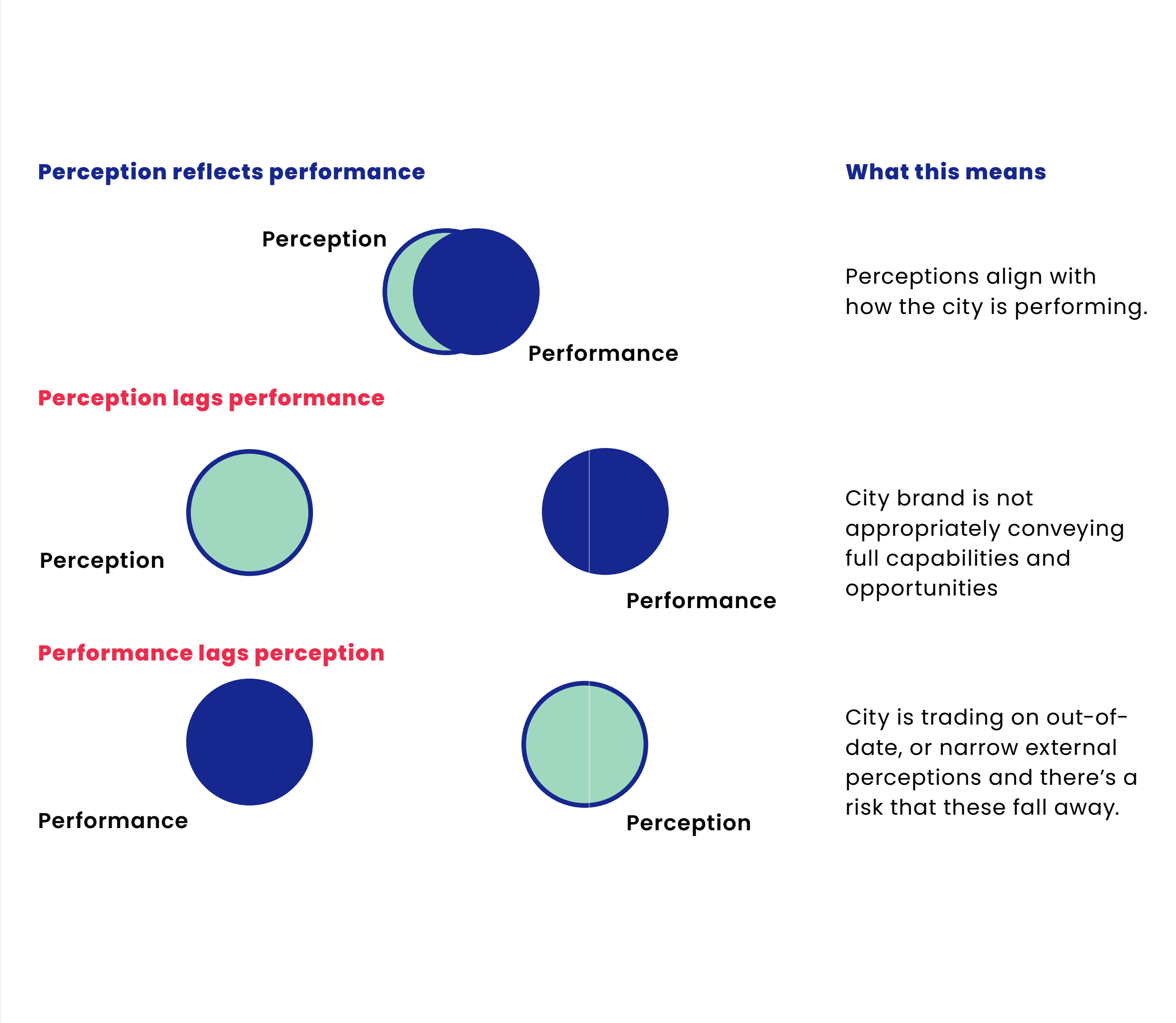
What follows is global benchmarking and other data that highlights the alignment or divergence of each of Sydney's six brand pillars.

A selection of both performance and perception metrics illustrate where there is both alignment and discrepancy.

Perception and performance metrics differ in scope and volume and so cannot be directly compared.

Perception metrics reflect what people with a range of backgrounds and experiences think about Sydney. Performance criteria draw on quantitative data and global comparisons may be driven by city scale as well as quality.

The perception and performance criteria illustrated here highlight examples where gaps between performance and perception are striking.



Visitor & destination brand

PERCEPTION

Metric	Source	Rank
Best cities in the world	CN	1
The Friendliest Cities in the World	CN	2
Safest Cities for Solo Female Travelers	IM	4
Search interest (APAC)	Resonance	5
Safest Cities for Mature Travelers	BH	7
Least Overrated Cities	KCB	46

Sydney's visitor brand is among the best in the world. The city continually rates among the most reputed and sought-after destinations, as rated by travellers young and old. Such is the power of this brand that it runs ahead of most performance measures of cities' tourism infrastructure, range of assets, and experiences.

This is backed up by a host of outstanding performances. Despite being only the world's 26th most internationally connected airport hub (OAG), Sydney is in the top 10 cities for tourism infrastructure, desirability as a location for business meetings, and visitor safety.

PERFORMANCE

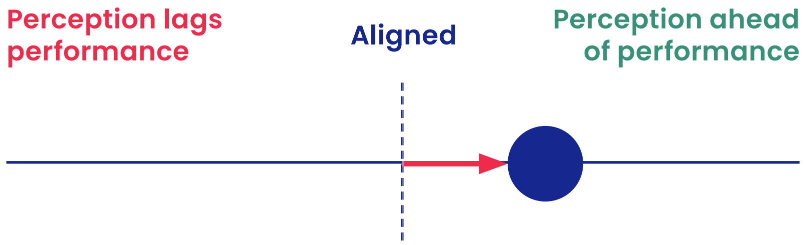
Metric	Source	Rank
Cities for international business meetings and conventions (Southern Hemisphere)	ICCA	2
Safest city to travel to	BH	5
Tourism infrastructure, performance and policy	EM	8
Most trending destinations	Airbnb	12
Tourists-to-residents ratio	WR	21
Airports' global connectivity	OAG	26

Sydney's arrivals experience for international travellers is one area under the spotlight. Large queues through customs, the continued use of paper-based forms for inbound passengers, and unclear or missing signage are undermining the first experience of many tourists arriving into Sydney (Skytrax, SMH).

The visitor and destination brand is the pillar where perceptions and performance are relatively aligned. Sydney's global bucket list destination perceptions are reflected in visitor performance – all the more impressive given the distance many visitors travel to come here.

The potency of Sydney's visitor brand is such that it crowds out or distorts other perceptions of the city.

Perception-performance gap: Visitor and Destination



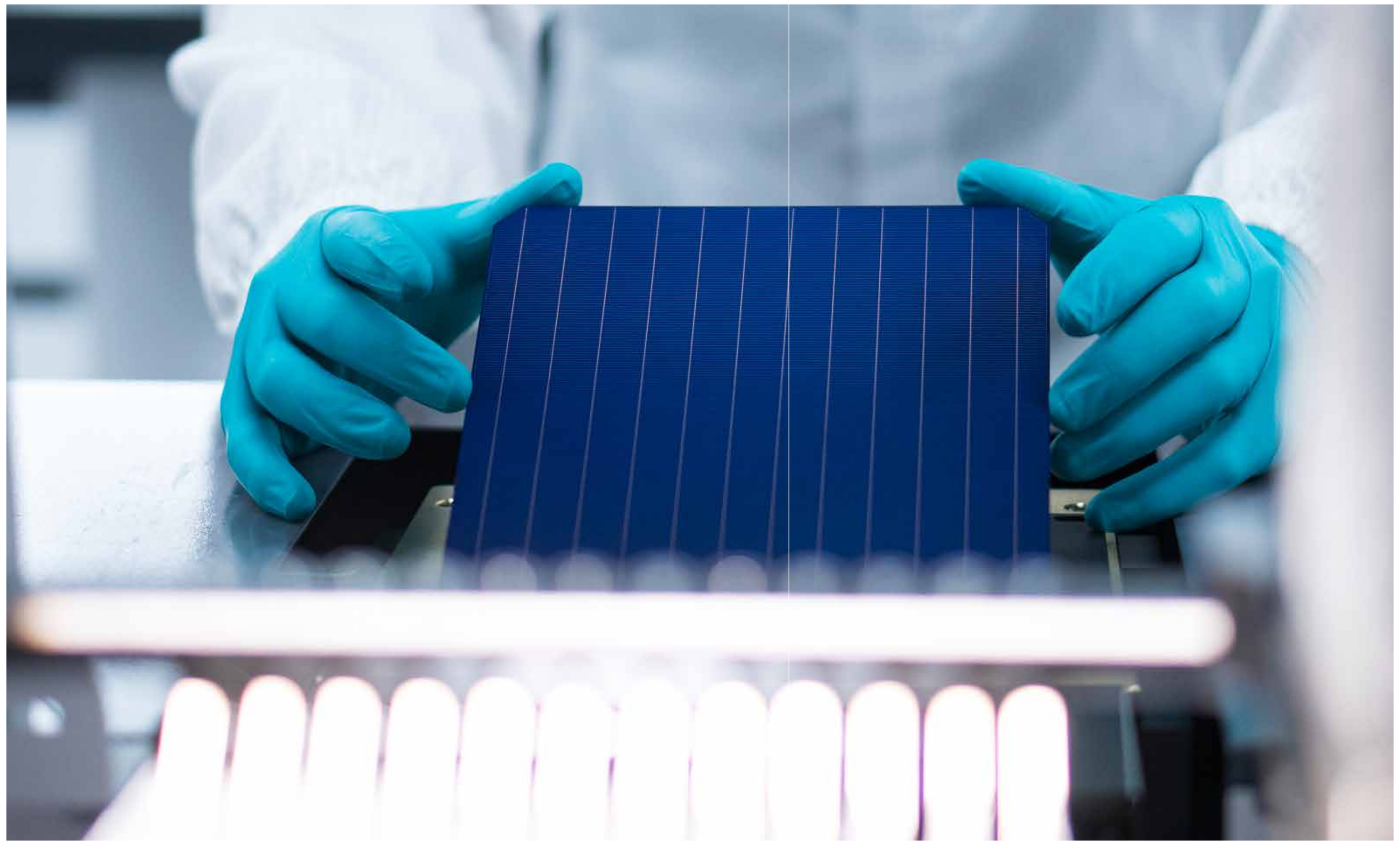
Business & innovator brand

PERCEPTION

Metric	Source	Rank
Perceived innovation status	TechStars	17
Attractiveness as a location for R&D unit	Menon/DNV	23
Perceived financial centres	Long Finance	27
Experience of salary & job Security	Internations	31
Perceived creative intensity	Long Finance	37
Expats view of their own Personal Finance	Internations	42

PERFORMANCE

Metric	Source	Rank
APAC Data centre capacity	Knight Frank	3
Maturity of fintech industry	Zhejiang	9
No. unicorns created in 2024	Dealroom	10
No. of funded alumni companies	Dealroom	17
Firms accessing Breakout capital	Dealroom	21
Startup acquisition	Dealroom	25



Sydney continues to quietly progress its credentials for international business. It became the only Southern Hemisphere city to enter the top tier of globally connected corporate cities (GaWC) and has recently overtaken 10 leading cities for levels of corporate and investor activity (Kearney). It is also rising up into the top 25 for startup acquisition (Dealroom, 2025) and is rated the 9th most mature fintech industry (Zhejiang)

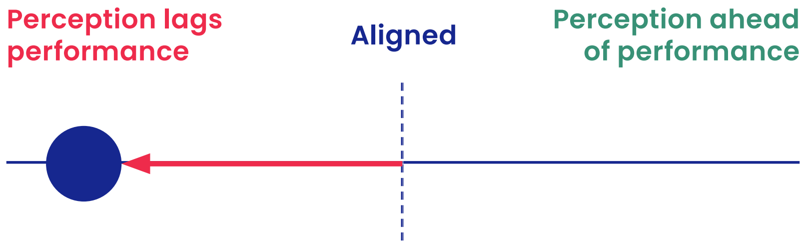
Yet these signs only rarely register in perceptions.

While the share of social conversations that touch on commercial life in Sydney is rising (ING Media, 2023), professional perspectives are more mixed. Among financial professionals, Sydney has fallen to 27th for assessments of global financial centres in 2025 (Qatar FCA). Among those with a technology and professional services SME orientation, Sydney is outside the top 25 for perceptions of the concentration of innovative industries, and of the quality of innovative work happening. And Sydney was only rated 12th in APAC by tech CEOs for technology hub credentials (KPMG).

Sydney was identified as among 25 top cities Sydney's reputation is just 17th for innovation prospects over the next 5 years (TechStars, 2024), despite being the largest innovation ecosystem in the Southern Hemisphere (Startup Genome). Just 5% see Sydney as a top global innovation hub, versus 7% for Toronto, and 31% for Singapore, when we have globally significant clusters of innovation sectors such as quantum computing, net zero and bio-medical technologies.

Sydney is fairly consistently down on where its performance now suggests it should be.

Perception-performance gap: Visitor and Destination



Talent brand

PERCEPTION

Metric	Source	Rank
Liveability	BF	2
Work Culture & Satisfaction	Internations	3
Student Desirability	QS	4
People & Values	BF	4
Talent appeal	BCG	10
Expat satisfaction with housing costs	Internations	36

Sydney has been establishing itself as a preferred location for international talent. For all of the last 10 years Sydney has been inside the top 10 for the share of mobile professionals who express willingness in principle to move to the city (BCG, BF). This reflects Sydney's raw lifestyle appeal.

One issue is that this inclination often does not convert to moves in real life. Another is that foreign talent who do get to experience Sydney do not always rate it quite as highly. Ratings by new arrivals of their disposable income, food scene and transport are all somewhat less strong than initial expectations would indicate., Although Sydney is up from its 2017 low (44th - Expat Insider) for how expats rate their life satisfaction its position tends to fall short of prior appeal.

So while Sydney is improving on a host of talent performance measures, the talent brand stills runs ahead. While rating 23rd globally for all round talent, it rates 6th amongst peer cities (JLL).

PERFORMANCE

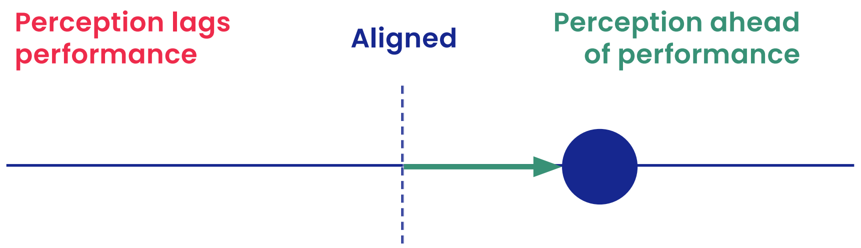
Metric	Source	Rank
International student talent pool	HSE	3
APAC software engineer talent pool	Karat	3
Education levels and mobility opportunities	Kearney	9
Internationally facing professional jobs base	TBoC	10
18-34yo planning to stay in their city	Gensler	17
All-round talent hotspot	JLL	23
5-year tech employment job growth	CBRE	51

Sydney's challenges regarding talent are often about long-term retention. Cost of living pressures for both owners and renters and recent changes to immigration policy impact on Sydney's desirability as a place to attract talent from across the world.

Although Sydney is one of only four cities with two universities in the global top 25 (QS), we risk missing out on opportunities at a time when U.S-based talent in high growth industries and research & development programs are looking to relocate as a result of federal disruption to the science and research environment.

Australia's perception as an attractive place for talent needs proactive policy responses in order to translate perceptions into higher performance.

Perception-performance gap: Talent



Resident brand

PERCEPTION

Metric	Source	Rank
Perceived beauty & access to nature	Time Out	3
Public transport	Hitachi	6
Overall resident satisfaction	Gensler	12
Dining choices	Mori	17
Perceived civic participation	IMD	42
Perceived issues of affordable housing	IMD	131

The resident brand sees perceptions and performance broadly in line. The real offer for residents, and the perceived extent to which Sydney prioritises residents, are fairly evenly matched.

Sydney enjoys significant civic pride and is well rated when locals are asked to consider the lifestyle amenity. The city is back in the top 15 best cities as rated by residents (Time Out). Citizen perceptions of Sydney tend to be more favourable than other cities when it comes to views of green spaces, education and core services.

But despite improvements they tend to be more mixed when it comes to whether the city is improving infrastructure, and the experience of technology-enabled services. (IMD)

PERFORMANCE

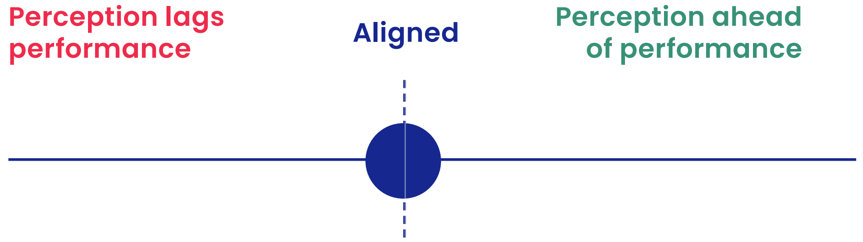
Metric	Source	Rank
Access to green space (top 20 global cities)	Husqvarna	3
City centre access to amenities	C40	5
Willingness to stay despite climate change	Gensler	7
Public transport platform (large int'l cities)	Oliver Wyman	19
Housing affordability	Demographia	94
Congestion across metropolitan area	TomTom	404

Day-to-day mobility experiences do not compare favourably to other cities across the world. While recent investments in the Metro system have seen an increased pride in the public transport system across Sydney, other elements of mobility are underwhelming:

- Sydney is among the 20% most congested metropolitan areas (TomTom)
- Sydney is outside the top 35% cities in OECD nations for access to primary school within a 15-minute walk (OECD)
- Sydney is in the bottom 40% globally for walkability (ITDP)

Overshadowing it all and impacting on quality of life of Sydney residents is the chronic housing affordability challenge, with Sydney continuing to be one of the top handful of most expensive cities in the world.

Perception-performance gap: Resident



Asset and investor brand

PERCEPTION

Metric	Source	Rank
Most Likely to see Rental Growth	PwC/ULI	2
Overall + Hotel Investor Intentions (APAC)	CBRE	2
Best Investment Prospects	PwC/ULI	3
Best Development Prospects	PwC/ULI	3
Global Investor Intentions - Multifamily (APAC)	CBRE	3
City's peace & stability	Gensler	17

Sydney is widely regarded as a safe bet for generating returns on investment. This runs ahead of investment volumes received. This indicates that Sydney is acknowledged as secure and dependable but could do even more to fully leverage this advantage for wider economic and development goals.

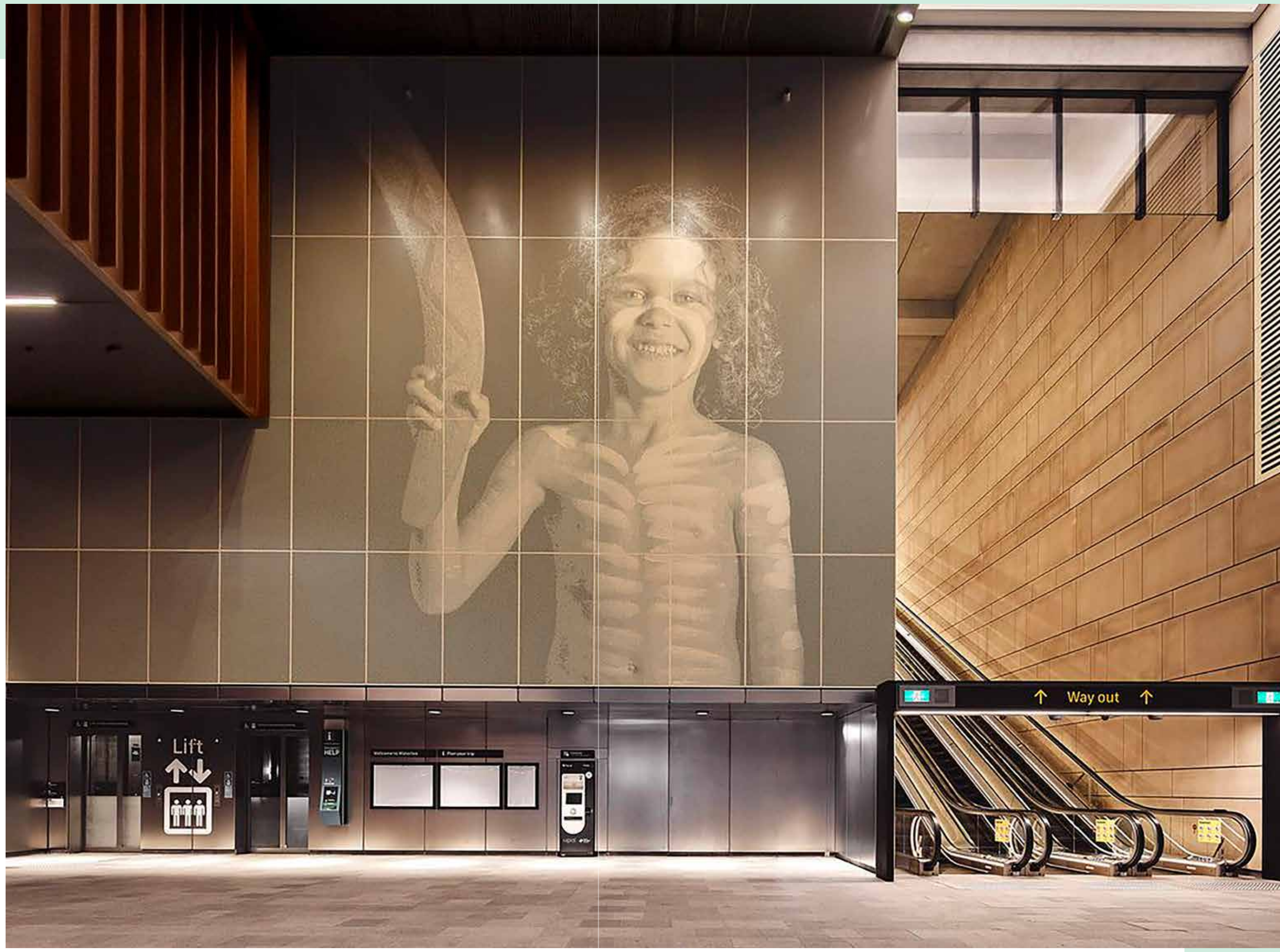
When it comes to global real estate investment, it is often important to look at where regional competition is most fierce, rather than compare globally. Sydney's key real estate market competition comes from the Asia-Pacific region.

PERFORMANCE

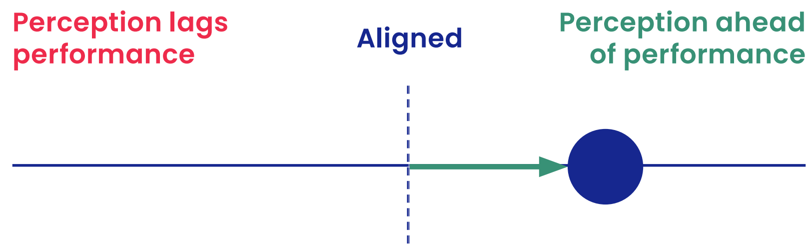
Metric	Source	Rank
Cross-border private investment	Knight Frank	2
Projected office occupier demand (APAC)	Knight Frank	3
Market vacancy (APAC)	Knight Frank	12
Overall corporate investment activity	Kearney	25
Medium-term asset return ingredients	Schroders	26
Construction costs	Arcadis	56

Sydney is up to 2nd for what Asia-Pacific investors think of the region's investment opportunities, up from 8th at the turn of the pandemic (CBRE, 2025). Going back 8-10 years the city is consistently in the top 3 for perceived development prospects and top 5 for investment respectively. (PwC/ULI, 2017-2024) The city is also currently rated 2nd among hotel investors (CBRE, 2025).

Sydney's well-regulated market, stable political landscape and strong economy means that it is a safe bet for many investments. This reputation is an important precursor to developing Sydney's reputation in fast growing industries, because businesses can't invest and innovation can't occur without the right facilities and investment environment.



Perception-performance gap: Asset and investor



Culture brand

PERCEPTION

Metric	Source	Rank
Coffee culture	Food & Wine	3
Culture offering	Time Out	5
Food scene	Time Out	14
Leisure options	Internations	26
Nightlife options	Mori	27
Locals' view on city's vibrancy	Gensler	30

PERFORMANCE

Metric	Source	Rank
Internationally recognised architects	HSE	2
Culture diversity in population	WCCF	3
Museums (APAC)	Resonance	9
International reach	HSE	15
Cultural content exports	Mori	21
Access to cultural events, museums and sport	Kearney	33

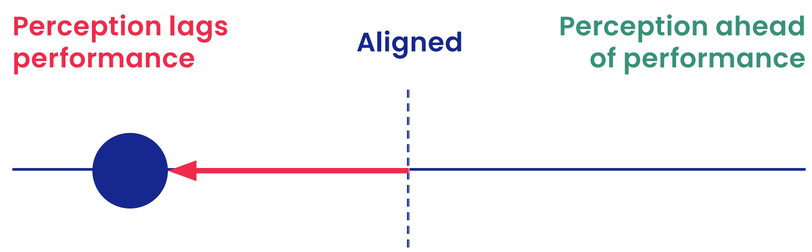
Sydney's culture brand is starting to improve having lagged performance for some time. In 2025 it made it to the top 5 cities globally for the arts & culture scene as rated by locals and experts. It is its first appearance in the top 20, receiving as many votes as Paris from culture commentators. (Time Out 2025)

Sydney punches at or above its weight when it comes to access to major cultural and sporting events and museums (Kearney, 2024). At a performance level Sydney's creative industries, music scene, and highly-rated amenities all stand out.

Yet surveys suggest that this progress has yet to catch up in the global mind. Among 45 top cities Sydney has been consistently perceived as outside the top 20 by global analysts for its museum and dining offer. And despite local improvements, perceptions of nightlife options still remain down at 27th (Mori 2025).

Vibrancy reforms introduced by the NSW Government since 2023 and an increasing diversity of food and cultural events reflecting Sydney's multicultural diaspora is changing the face of Sydney's cultural landscape. In Parramatta, the Powerhouse and Riverside Theatre highlight an intentional rebalancing of Sydney's cultural projection beyond the traditional harbour icons such as the Sydney Opera House.

Perception-performance gap: Culture



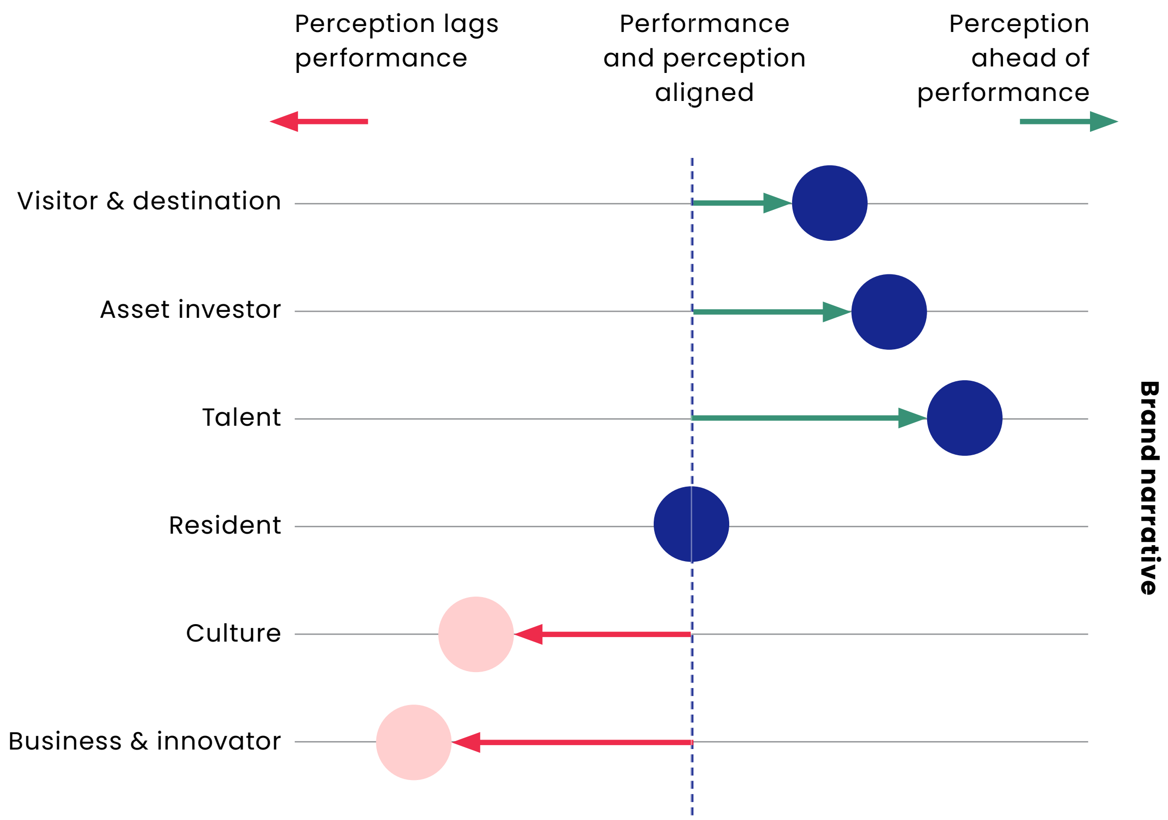
A diversified city brand

In only a small number of areas do perceptions of Sydney tightly align with real competitive performance. Overall, there are notable imbalances, and the tendency towards divergence between perception and reality is relatively unusual for a top global city.

In Sydney's visitor and talent brand pillars, perception slightly exceeds performance, thanks to the magnetism that is derived from Sydney's iconic imagery, lifestyle appeal, and widespread visibility. Here we see that infrastructure gaps, logistical inefficiencies, high costs and delivery challenges, all mean reality sometimes falls short of expectations.

Conversely Sydney's performance in business, investment, and increasingly culture, is clearly underestimated, judging by the extent it surpasses international perceptions. While Sydney has advanced into one of the Southern Hemisphere's epicentres of commerce, discovery and vibrancy, these have not accrued comprehensive recognition. Such gaps appear to reflect not only an overshadowing tourism identity, but also some ingrained assumptions about what Sydney is and isn't for, as well as the specific challenges changing global minds and stereotypes for a city further away from most external observers.

Sydney finds itself at a juncture that other international cities have found themselves in the past, where proactive efforts and imaginative interventions become necessary to help bridge the performance-perception gaps.



Brand insights from global cities

Many pillars make up Sydney's 21st century identity. As such the prominence of Sydney's visitor and destination brand has become a double-edged sword. While it grants immediate recognition right across the world, it blurs the quality and variety of offerings we have a city.

A brand imbalance is by no means an issue unique to Sydney. Global cities have been grappling for up to 30 years to confront the risks of a lopsided brand and make inroads to address it.

Amsterdam confronted the predominance of its permissive visitor brand by leaning into its enduring local values, prioritising destination management, and building up its reputation for creativity and leadership.

London has been revealing the depth of its identity through locations and edges well beyond Central London. It merged its agencies' capabilities to tell a nimble and integrated story, with industry to the fore. This enables it to respond to new opportunities on everything from theatre to fintech to resilience.

To overcome its prior image as a 'playground for bankers and tourists', New York City developed a unified city voice, spotlighting stories from across all five boroughs. Emphasis on entrepreneurs, local creators, and cultural diversity reframes the city as a hub of creativity and ideas, that any New Yorker can get behind, contribute to and adopt using a style guide.

Singapore recognised the risk of being typecast as a sterile city of commerce, and focused much more on people, emotional connection, and innovation success stories. More serious engagement beyond Government has produced more clear and consistent values-driven messaging.

An illustration of how these cities each matured their brand is summarised in the following table.

	Perception – performance gaps they tried to address	What they did that Sydneycan learn from
Amsterdam	• Overbalance of visitor brand • Preoccupation with city centre • Place to live, work and invest	• Lean into the DNA and core values in invitational way • The whole region story matched by incentives • Destination management to match
London	• Finance and 'bowler hats' • Bring resilience & resident to the fore • Unleash the breadth of creativity and innovation	• Merger of tourism, investment and education promotion agencies • Industry-led coalition • The whole metropolitan story
New York City	• Beyond the 'Playground for bankers and tourists' • Amplifying the creative industries • Story of resilience and revival	• Stories of entrepreneurs, artists and local communities • Partnerships with content creators and ambassadors • Permanent collaboration between tourism marketing and economic development agency
Singapore	• People and purpose: create emotional pull • Avoid risk of being seeing as too sterile or soulless • Reveal the breadth of activities and capabilities	• Consistent campaigns and taglines • Serious industry and citizen input • Storytelling bridges between industries

"It's an easy pitfall to start telling the stories that every city does…but what is the common ground that makes us really unique? And the process took about two and a half years, [and] we found out after the research, the discussions, that our real DNA is the combination of creativity, innovation and spirit of commerce. And like I said, it's always the combination."

GEERTE UDO, AMSTERDAM & PARTNERS

Amsterdam

Amsterdam's brand has evolved dramatically over the last 15 years as it has learned to balance success with sustainability. The strategic imperative 15 years ago was to shed outdated stereotypes (of tulips, windmills, and a red-light district) and become much more synonymous as a place to live, work, and invest.

In 2004, the city set up a public-private partnership called Amsterdam Partners which unveiled: "I amsterdam" – less a tourism catchphrase or art installation, and more a statement of identity hinging on core values of creativity, innovation, and a spirit of commerce. The idea is that the "I" (the individual) and "Amsterdam" (the collective) are indivisible, inviting everyone to be a part of the city's story.

With Amsterdam's success came overtourism, and so Amsterdam's strategy pivoted to managing the destination. The city broadened its brand narrative to include responsibility, community values and shared spaces. Marketing budgets were reallocated to encourage tourists to explore beyond the crowded centre. Metrics were reframed beyond visitor numbers towards visitor satisfaction and resident well-being.

The city's marketing arm became a destination management organisation, indicating a more collaborative, networked approach. The reformed Amsterdam & Partners became much more focused on curating the behaviour and mindset of every 'customer' of the city – focusing more on culture, tech entrepreneurship and as a champion of sustainability. Amsterdam was keen to stress that unlike other European cities, it was not a museum but a living lab of ideas. Marketing materials began to feature real Amsterdammers more, telling their stories, and even using more Dutch cultural references (from Johan Cruyff to Van Gogh) to root the brand more authentically.

Amsterdam has realised how important stakeholder integration is with the stories put out by museums, hotels, airport and even Airbnb hosts. The idea is every policy and every stakeholder action feeds into the city's brand.

Amsterdam's vision now is to lean even more into its DNA and creative, respectful ethos, with its strengths in innovation, art and design to the fore.

London Growth Plan

London: The city of reinvention

London

London has spent the past 15 years reshaping and maturing its brand to tell a unified story of a world city that's open for business, talent, and ideas – while also leading on resilience and inclusiveness.

The idea was to go beyond royal heritage, Big Ben postcards and "Keep Calm" souvenirs towards a focus on London's creativity, diversity and innovation. Initiatives like "Tech City" and London's creative industries were woven into the brand message, showing a city constantly in reinvention mode.

London took the step to merge its tourism, investment, and education promotion agencies into London & Partners. The aim was to diversify London's economic development, drive up the quality of inward investment as well as raise visitor and student numbers.

London & Partners was an industry-led coalition committed to alignment so that London could speak with one voice – not a Government initiative but a shared story. It is proactive at supporting London startups, telling the story of London's innovation districts, bidding for major events, and even helping small businesses in outer boroughs. Tighter agency coordination meant London could promote fintech or theatre all under "Brand London."

The next chapter of London's city brand is about future-proofing in the new geopolitical, technology and talent context, and communicating the city's deep and well-rounded civic identity. The emphasis is on resilient and sustainable growth, aligning the city's brand with green innovation and a sustainable built environment. London competes as the place where international talent benefit from 'career escalator' effects.

The city leads with confident messages of being a leader and pacesetter for climate tech and green finance, and a stronger sense of neighbourhood well beyond the icons in the West End.

"At London & Partners – the capital's business, growth and destination agency – we are at the forefront of driving London's reputation as 'THE' place to do innovation in the 2020s and beyond."

Laura Citron, CEO, London & Partners

"Our new brand captures the essence of New York City in its entirety: an ever-expansive destination that offers diverse and authentic experiences"

Fred Dixon, President and CEO, NYC & Company

New York City

For decades, NYC's image was crystallised in the "I ♥ NY" slogan – perhaps the world's most successful and enduring city campaign. These were reinforced by a litany of songs and movies that define the spirit of the city.

By the 2000s NYC had already been a first mover in restructuring its marketing apparatus: NYC & Company (the convention and visitors bureau) was expanded and unified with the city's marketing and events agencies to provide a single voice for NYC's brand. However in the aftermath of the financial crash, New York saw it could not be simply a playground for bankers and tourists – viewed through the prism of Times Square and Broadway. Competition from cheaper cities was hotting up. Instead its five boroughs are the world's biggest melting pot of culture, innovation and lifestyle.

NYC's brand narrative also embraced its status as a trendsetter in film, tech and fashion. By championing homegrown startups and designers, New York signalled that its brand was about cultivating the creative industries. The stories of entrepreneurs in Brooklyn, immigrant communities and food cultures in Queens, and artists reinventing the Bronx – all fell under an ever-expanding banner of NYC. Celebrating the city through the eyes of its people. "All In NYC" was a rallying cry reconnecting locals.

Rather than top-down slogans, NYC's brand is now more crowdsourced and coordinated.

The lead agency for tourism marketing works closely with the NYC Economic Development Corporation (NYCEDC) and others to ensure a unified message. There is a single NYC.gov style guide for both business initiatives or visitor events.

New York is often one of the cities hit first by major new changes - remote work, pandemic effects and social justice movements being the most recent. The city's focus is to show it can remain the world's most inspiring city through every cycle. Local voices even more visible, through content creator partnerships, neighbourhood ambassadors. New York as a global leader on climate change and new sciences.

"There is synergy to have common branding across all agencies. The new Singapore brand personality very much applies to Singapore companies and their DNA, and will help us as we work with companies to go global."

International Enterprise Singapore

Singapore

Singapore has rewired its global image by telling a deeper story about its people and purpose.

Long admired principally for its efficiency and modernity, Singapore risked being seen as safe, sterile and soulless. The lack of emotional pull was a real concern. By the mid-2010s, the city-state's leaders realised they needed to diversify the economy and shift from an investment-driven to innovation-driven model. This required a story and a fabric that was inviting to scarce talent and investment

Leaving beyond the images of Marina Bay rooftop swimming pools, gleaming malls and skyscrapers – the focus has been on creativity, enterprise, determination, and cultural layers.

In 2017, the Singapore Tourism Board (STB) and the Economic Development Board (EDB) joined forces for the first time on brand to launch "Passion Made Possible." The idea was to reveal Singapore's drive and its sense of opportunity.

Much more of the focus has been on Singaporeans themselves, the embodied personality and ambition that Singapore stands for. Campaigns were organized around "Passion Tribes" (such as Foodies, Explorers, Culture Shapers), showcasing excellence and invitation in ordinary moments, in line with the broader economic imperative – alongside a continued focus on making the most of its global events. "Made in Singapore" has endured well beyond the initial campaign cycle to remind the world of the extraordinary productive and experiential capability Singapore offers.

Several years of shared campaigns and taglines have built an affinity between the business and visitor attraction arms, and a fluency singing from the same hymn sheet.

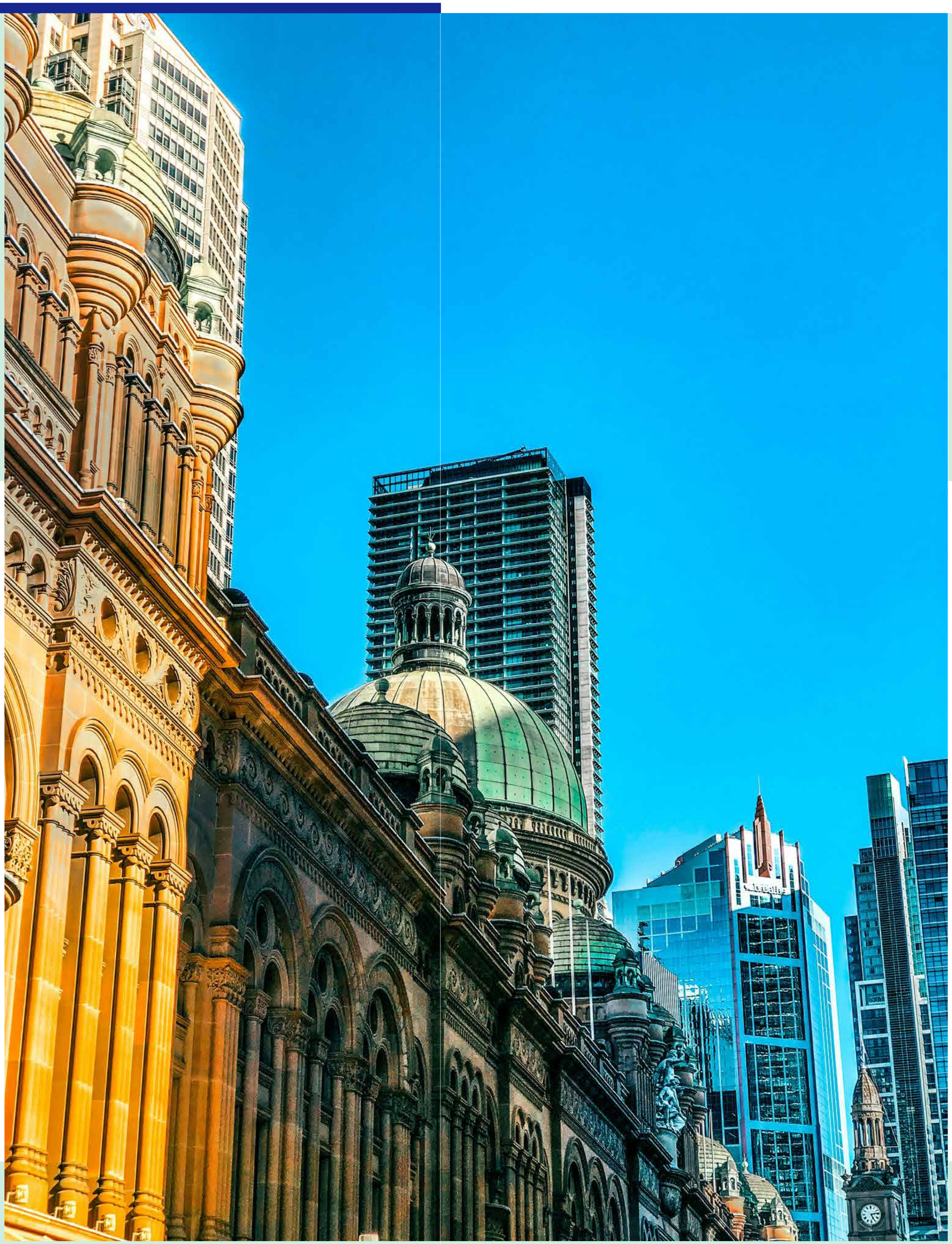
Widening the internal buy-in has been a key priority for Singapore's brand owners. Citizens and industry stakeholders – from airlines to attraction operators – have been proactively engaged. Singapore combines more initiatives – such as its Tourism Accelerator, which brings tech startups to enhance the destination experience.

Lessons from overseas

Sydney can learn much about diversifying its brand not just from these four case study cities, but its other peer cities and global exemplars.

Across the case studies and other cities with successful city brands, ten lessons stand out:

1. **A more balanced brand picture.** Well established cities forefront the city's roles in production, diplomacy and innovation, within a common set of stories that work across markets. This balancing requires a prioritising of identity, reputation, story, and soft power, in ways that allow the narrative to flex as new sectors, breakthroughs and social agendas emerge.
2. **Collaborative alliances.** There is growing acknowledgement that storytelling is a team game: single stakeholder-led campaigns and initiatives are viewed to be less effective and cost efficient without brand and marketing alliances. This can take the form of Public/Private/Civic agencies, building up to mechanisms to share costs and benefits and even establish shared back-office and brand-box tools.
3. **Efforts to build internal pride and confidence.** Empowering capable locals to tell the story provides much needed integrity, authenticity and consistency for increasingly savvy global audiences. This requires alternative mechanisms to fund, programme and design content to underpin these mechanisms. Australia often has a tendency to talk itself down, but a strong city brand requires us instead to celebrate and promote our strengths.
4. **The use of catalysts to generate a fresh perspective** – new districts, pieces of infrastructure, awards, TV shows and cultural hits all provide a rolling set of ideas for journalists, investors and visitors.
5. **Convening of international champions, ambassadors, friends, diaspora and alumni.** More cities are developing their version of an advocates CRM to multiply reach and foster co-creation.
6. **A desire to be on the front foot on global issues and agendas.** Flagship cities seek to adopt a generosity of stance to the world on key issues. Their brand leadership also faces towards the industries of tomorrow's economy, and signals openness to partnership and experimentation.
7. **Avoid the generic.** Cities are responding to a desire to know the story of the city 'warts and all' - deeply and authentically. This requires an endeavour to make the city's promise personal, reveal surprising sides to the city, and a sustained effort to capture the imagination.
8. **Ensure alignment of brand and experience.** Cities see more risks if the brand is not credibly aligned with the typical experience. They carry out more audits and speed up the fixes where expectations and on-the-ground reality drift apart.
9. **Ensure identities are aligned.** Cities with centuries of history and comprehensive global reach have a multi-faceted brand narrative that speaks to both local and international audiences. They seek the costs and contradictions when internal and external identities are in tension or conflict; therefore, ongoing dialogue with community groups, businesses and media is non-negotiable.
10. **Align brand with wider policy and vision levers.** More cities now hard-wire the city story into planning, infrastructure and investment decisions and collateral, so new catalysts of city change reinforce the positioning.



Cycles of brand maturity for great cities

Global cities who grow and evolve to play multiple kinds of international roles realise that they need their brand identity to evolve with it.

Cities success model and brand delivery are a flywheel: the substance and storytelling must be in sync for the city to attract the kinds of opportunities it wants and needs. As high-demand cities grow, the factors that drive their ability to reproduce their success change. Their operating model has to update if they want to compete and prosper – because they have to generate more jobs and opportunities to match their enlarged scale, their infrastructure demands increase, expectations rise, and new industries emerge with different kinds of value creation process and spatial preferences.

More mature global cities entering their 3rd and 4th cycles of intentional development see the need for more cohesive, multi-dimensional and user-focused brand identities.

Brand delivery is what a city does to put itself in the shop window to the world. Brand delivery is defined by a 'why', a 'what' and a 'how'. Cities tend to learn to adopt a different style, emphasis, process and purpose when delivering their brand through different phases of the city's growth and change.

SUCCESS CHARACTERISTICS

First Cycle

- Population-driven growth
- Tourism, professional services, major events and higher education pivotal
- Physical renewal of the CBD, commercial development landmarks
- City as a Destination
- New hosting infrastructure
- Individual projects, agencies, budget envelopes

Brand delivery:

- Eye catching promotion to gain market share
- Visitor brand leads
- CBD 'postcard' imagery dominates
- Competing for students and events
- Individual FDI 'wins' viewed in isolation
- Sector by sector, each in silos.
- Hunt the customer via targets & transactions
- Programme approach, campaign bursts.
- Strong focus on incentives
- Government leads, partners benefit.
- Counting outcomes – footfall over goodwill

Sydney sits here

Second Cycle

- 'New economy' sectors mature
- Universities, skills and innovation districts.
- Culture and creativity
- Entrepreneurship
- Optimise the CBD's carrying capacity and experience
- Emergence of new centres with some gravitational pull
- Infrastructure catalysts start to reshape the city.
- Funding tools
- Common visions

Brand delivery:

- Proposition – a differentiated value promise.
- Talent and creativity brands to the fore – people as well as icons.
- First combined messages across multiple sectors.
- Targeted channels and message curation to reach preferred markets.
- Market intelligence gathering from business and diplomatic links.
- Partnerships with Gov agencies to ensure investment & business attraction is aligned.
- Common agendas to balance brand.

Third Cycle

Sydney sits here

- Wider economic and spatial diversification
- Integration between consumption, production and innovation roles
- Grow the locational value, jobs base, and the tax base.
- Organise around value of place
- Climate resilience as competitive advantage
- Larger reforms and joint ventures

Brand delivery:

- Uniqueness, Story, Invitation
- International influence
- Eco-system approach
- Building shared capability
- Norm of public-private collaboration
- Single front door
- One-stop shop websites, maps and platforms
- Magnetise the customer to join the team
- Brand coalitions with Business, Institutions, Civic entities.

Fourth Cycle

- Global recognition for city's specialisms, leadership and DNA
- Permanent coalitions to address externalities that come with growth
- Built environment prioritised as core to the social contract
- Pioneering on economic models and infrastructure solutions.
- Ecosystems are fully orchestrated
- Many more sources of infrastructure investment
- Proactive coordination with smaller cities.

Brand delivery:

- Brand identity embedded and expressed in transport, planning, culture, education, economic development.
- Soft power and co-benefits.
- Convening, resourcing, and sharing responsibility
- Private sources of co-investment.
- Continuous presence in multiple markets
- Targeting big and small

BRAND DELIVERY

Developing Sydney's brand

Sydney's differentiators

Yes, Sydney is glamorous, beautiful, athletic, hedonistic and visceral. But at deeper levels Sydney also has many special assets and advantages that differentiate it from the pantheon of great global cities.

1. The 60,000-year human story sets it apart from all other major global centres. This story of First Nations cultures is a unique point of difference that resonates profoundly.
2. Landscape and habitat. The beauty and appeal of Sydney's dramatic, dreamy, and diverse scenery, its topography and its climate have continuously been an inspiration for people. The lushness of its habitat in organic proximity to people, is conducive to human flourishing and congregation.
3. Cumulative diversity as a centre of migration to Australia over successive cycles. Sydney is a place where people achieve their dreams, where old and young come together, and where there is energy for new ideas and activation of these ideas. Sydney conveys possibility and ambition through its critical mass and diversity.
4. Mindset and attitude. Sydney has a personality that fosters a certain mindset and lifestyle – something of the 'the larrikin spirit in the metropolitan setting'. Sydney's brashness, free-spirited and self-confident endeavour, and openness to talent all favours creativity, autonomy, innovation, and excellence.
5. Scale. Sydney is a tapestry that enjoys a distinctively diverse mix of local hubs, neighbourhoods and suburbs. These locations are all hotspots with global potential as well as great community value and character.
6. Confidence. Sydney holds pre-eminent roles for career success, decision-making, education, media, performance, travel, political discourse and arrival. We are in a very small pool of cities with two or more universities in the global top 25 – the others being Boston, London and Beijing (QS) and we are the number one city in the Southern Hemisphere for startup ecosystems. These give it an ambition befitting of the undisputed capital of the Southern Hemisphere.

These six inherited features of the people, the history, and geography of the region give it a unique place in the global landscape of cities.

Sydney also benefits from a strong national identity – the 'Down Under' narrative of beautiful landscapes, relaxed atmosphere and outdoor lifestyles that bring both opportunities and challenges to how we are perceived. This identity ensures that Australia is highly recognisable globally – and Sydney as its equally recognisable gateway for so many - benefits from this global recognition but also carries the burden of its narrowness.

Sydney has witnessed extraordinary moments in global human history and will host many more. It is seen to be uniquely well placed to tell its (and indeed the Australian national) story in all its phases and layers.

Opportunities for Sydney

As Sydney has grown and matured as a diverse metropolitan city of multiple edges and centres, its success model has clearly shifted into a 2nd cycle and arguably is on the cusp of a 3rd cycle.

This makes it important that its brand delivery model updates to match.

Staying in 1st cycle or early 2nd cycle mode presents a clear risk. Sydney will be unlikely to achieve its goals of broadening the base of jobs and opportunities and locations, and building its innovation credentials, if it continues to be primarily perceived and promoted as a city for short term experiences and one-off opportunities.

Multiple efforts in the past have been made to build a brand narrative for Sydney that is more balanced, bold and coordinated, but with limited effect to date.

Experience from other cities suggest that usually the window of opportunity to shift approach arises when:

- There is a catalyst – either due to a crisis or a vacuum of strategic planning and governance.
- A new set of economic and outward-facing assets – e.g. new business success stories, major new piece of infrastructure, emergent specialisations, matured innovation districts.
- Institutional leadership willing to set agendas and build trust
- A source and mechanism for continuous business engagement, confidence and leadership.

Sydney's opportunity:

- ✓ Based on a clearly stated ambition and vision for Sydney's future, that also encompasses a narrative that Sydney and Australia can lead globally.
- ✓ A coalition of industry and civic leaders who will provide vision and energy for creative, visible, and forward-looking partnership with state agencies to reimagine Sydney's brand.
- ✓ A combined story with innovation, trade, tourism and the arts.
- ✓ A collaborative effort across whole of Government and society that 'keeps Sydney real'.
- ✓ Promotion of Sydney for trade, talent, investment, innovation or tourism should involve its startling physical and human identities.
- ✓ Sydney's location, habitat, and diverse technological and industrial capabilities are the soil for cultural and innovation leadership.
- ✓ Economic, event and institution attraction strategies that line up with the brand.
- ✓ Tools for integrated and sophisticated multi-channel programme of exposure, events, stories, social media, and market positioning – backed up by effective concierge, relationship management and product development.

Next Steps

Sydney has significant potential to develop its global brand, building on the opportunities this report identifies and lessons from how other cities have approached brand development. This is what we need to do next.

Get the story straight

Sydney's current brand perception is heavily dominated by the visual appeal of a visitor destination. This means Sydney is highly recognisable, but the visual identify overshadows other brand segments. Mature city brands are more flexible and are able to face in multiple directions.

Target audiences will vary across brand segments and will therefore have different intentions and priorities. Different cultures, countries or demographics will be the focus of different aspects of Sydney's value proposition. International student markets may differ from markets to attract investment capital or research talent.   These audiences need to be understood and planned for.

1. **Expand the brand from visitor economy** to reflect the diversity of Sydney and develop clear brand narratives for each of the following:
   - Visitor & destination
   - Asset investor
   - Talent
   - Resident
   - Culture
   - Sports
   - International Education
   - Business events
   - Innovation and start-up
2. **Know the audience.** Identify the audience by mapping domestic and international target audiences.
3. **Define success.** Identify the metrics of success and the economic scale of the opportunity to use in engagement collateral.

Conduct the orchestra

How audiences are communicated with will vary depending on their needs and Sydney's value proposition. Communication channels and messaging needs to reflect these different needs.

Sydney's current positioning is almost singularly a visual one of the harbour. This may be useful for tourists, but less so for an institutional investor interested in regulatory environments. Recent changes to the Sydney visitor brand under the 'Feel New' campaign identify the need to go 'beyond the icon' – and this is a great first step.

It is vital that the breadth of stories that are told to Sydney's audiences are complementary, consistent and coherent. While the Opera House or Harbour Bridge may be the first thing that comes to mind for many, it should be just one of many stories we tell about ourselves on the global stage.

4. **Sing from the same song sheet.** Develop orchestrated communication strategies that amplify and channel Sydney's brand and provide consistent messages that are presented to target audiences.

Collaborate to compete

Every day a city's story gets told by individuals and stakeholders through numerous formal and informal interactions.

This narrative should feel common – so that each time someone experiences the Sydney brand narrative the underlying message is the same, reinforcing each subsequent touch point.

This can best be achieved by creating an entity that holds and manages a common narrative, that reflects the breadth of actors, sectors and priorities. The entity cannot be wholly-owned by government but rather should facilitate coalition-building across sectors.

5. **Co-invest.** Establish a public-private partnership that has carriage of Sydney's brand, and acts as a co-ordinating, curating and promotional body on behalf of Sydney.

Thank You

The Committee for Sydney extends our thanks to our Innovation Fund Partners and Global Pathways Partner

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Sydney's Parkland Councils – The Parks

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City of Parramatta

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