Citizens' Views and Priorities

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IPSOS TOP CITIES

Based on what you have seen yourself, or heard about from others, which three cities in the world do you think are the best to…

1. Live in?

2. Visit?

3. Do business in?

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Which is the world's favourite city?

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WHICH ARE THE TOP CITIES FOR…

LIVING?

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Top City for living 2017:

Zurich

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Top cities for living 2017

City	% score	2017 rank	2013 Rank
Zurich	18	1 (-)	1
Sydney	16	2 (-)	2
Abu Dhabi	13	=3 (↑)	7
Vancouver	13	=3 (-)	N/A
Stockholm	13	=3 (↑)	8
London	12	=6 (↑)	=3
Amsterdam	12	=6 (↑)	=10
Toronto	12	=6 (↑)	6
Oslo	12	=6 (↑)	=10
New York	11	=10 (↓)	5
Paris	11	=10	=3

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WHICH ARE THE TOP CITIES FOR…

DOING BUSINESS?

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Top City to do business in 2017:

New York

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Top five cities to do business in 2017

City	% score	2017 Index rank	2013 Index Rank
New York	23	1 (-)	1
Abu Dhabi	21	2 (-)	2
London	16	=3 (⬆)	5
Hong Kong	16	=3(-)	3
Tokyo	15	5 (⬇)	4
Zurich	11	=6 (⬆)	7
Beijing	11	=6 (-)	6
Los Angeles	11	=6 (⬆)	10
Berlin	10	=9 (-)	=9
Shanghai	10	=9 (-)	=9

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WHICH ARE THE TOP CITIES FOR…

VISITING?

Top City to visit 2017:

Paris

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Top five cities to visit 2017

City	% score	2017 Index rank	2013 Index Rank
Paris	21	1 (-)	1
Rome	20	2 (↑)	3
New York	16	3 (↓)	2
London	13	=4 (-)	4
Sydney	13	=4 (↑)	5
Abu Dhabi	12	=6 (-)	=6
Tokyo	12	=6 (-)	=6
Amsterdam	10	8 (↑)	=10
Los Angeles	9	9 (↓)	=7
Madrid/Zurich	8	10 (-)	=10

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Top cities:

Generational favourites

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Top Cities Index: rank by generation

| Baby Boomer (1945-65)	Gen X (1966-79)	Millennial (1980-95)	Gen Z (1996-)
1. Zurich	1. New York	1. New York	1. New York
2. Sydney	2. Abu Dhabi	2. Abu Dhabi	2. Abu Dhabi
3. New York	3. Sydney	3. Paris	3. Tokyo
4. London	4. London	4. London	4. London
5. Abu Dhabi	5. Zurich	5. Tokyo	5. Los Angeles
6. Paris	6. Paris	6. Rome	6. Paris
7. Vancouver	7. Tokyo	7. Los Angeles	7. Rome
8. Rome	8. Rome	8. Zurich	8. Sydney
9. Tokyo	9. Vancouver	9. Sydney	9. Amsterdam
10. Stockholm/Toronto/Vienna	10. Amsterdam	10. Amsterdam	10. Berlin

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Top cities to live in: scores by generation

Baby Boomer (1945-65)	
Zurich	23%
Sydney	19%
Vancouver	17%
Stockholm	16%
Oslo	15%
Toronto	14%
Vienna	12%
Amsterdam	12%
Auckland	12%
Copenhagen	11%

Gen X (1966-79)	
Zurich	21%
Sydney	19%
Vancouver	14%
Stockholm	14%
Oslo	14%
Abu Dhabi	13%
Toronto	12%
Amsterdam	12%
Auckland	11%
London	11%

Millennial (1980-95)	
Abu Dhabi	14%
Zurich	14%
New York	13%
Sydney	13%
London	13%
Paris	12%
Amsterdam	12%
Toronto	12%
Vancouver	11%
Stockholm	11%

Gen Z (1996-)	
Los Angeles	16%
Abu Dhabi	15%
New York	15%
London	14%
Amsterdam	13%
Paris	12%
Zurich	11%
Rome	11%
Sydney	11%
Tokyo / Vancouver/ Toronto	10%

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Least popular cities out of 60 offered

		Live %	Visit %	Work %
=48	Guangzhou, China	1%	1%	3%
=49	Tel Aviv, Israel	1%	1%	1%
=49	Manila, Philippines	1%	2%	1%
=49	Casablanca, Morocco	1%	2%	1%
=49	Jakarta, Indonesia	1%	1%	1%
=49	Warsaw, Poland	1%	1%	1%
=53	Bogota, Colombia	1%	1%	1%
=53	Belgrade, Serbia	1%	1%	2%
=53	Lagos, Nigeria	1%	1%	1%
=53	Karachi, Pakistan	*	1%	1%
=59	Nairobi, Kenya	*	1%	1%
=59	Tehran, Iran	*	1%	*

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Globally…

Top priority for a mayor to address

CRIME + PUBLIC SAFETY
- VOTERS: 63%
- INFLUENCERS: 67%

HEALTH + WELL-BEING
- 55%
- 53%

UNEMPLOYMENT + JOB CREATION
- 54%
- 57%

INFRASTRUCTURE
- 54%
- 55%

POVERTY, HOMELESSNESS + HUNGER
- 53%
- 53%

ADAPTING TO CHANGING NEEDS OF POPULATION
- 34%
- 40%

RESILIENCE
- 32%
- 34%

NATURAL DISASTERS
- 32%
- 34%

CLIMATE CHANGE
- 27%
- 30%

100 RESILIENT CITIES   Ipsos
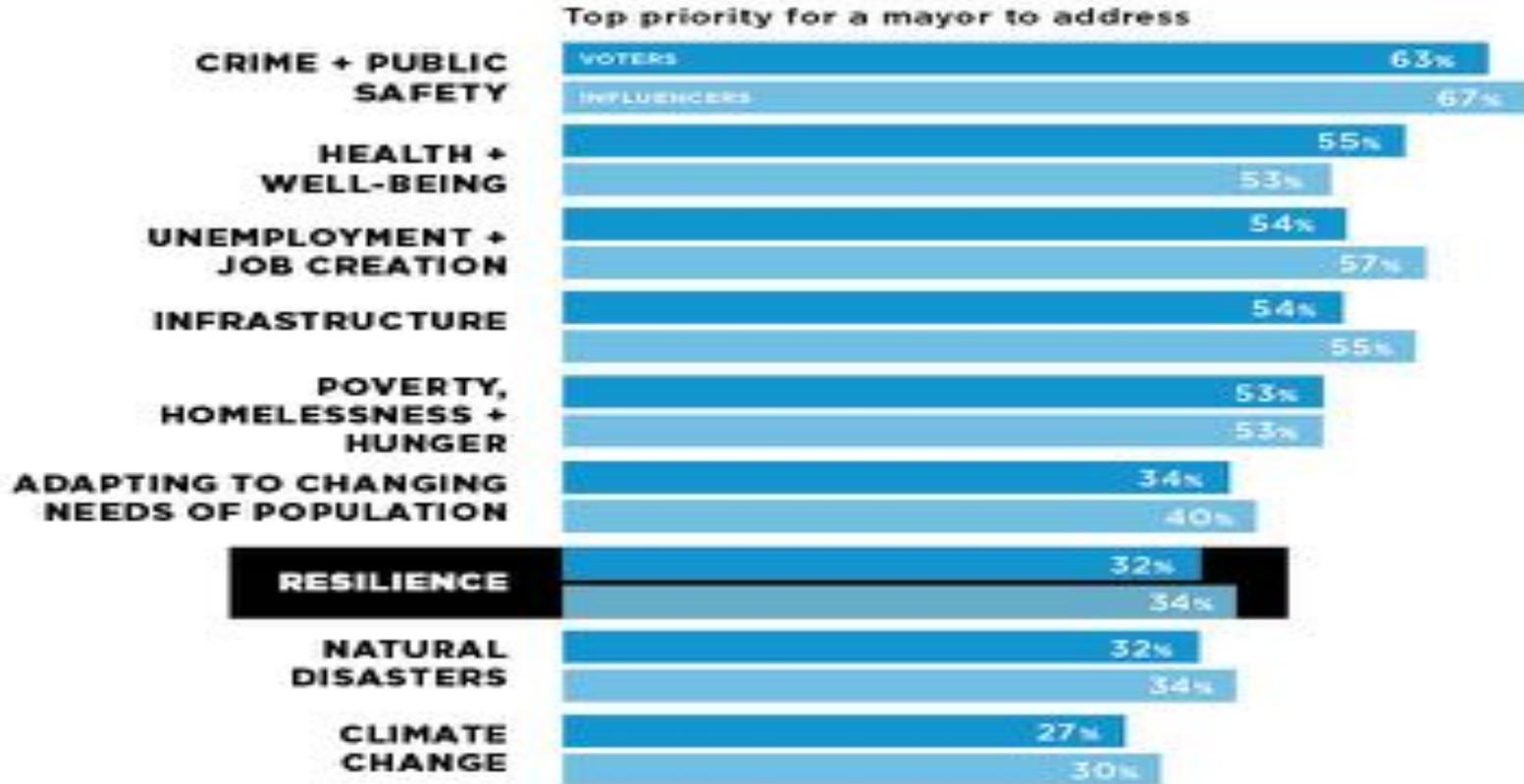
What Makes Somewhere a Good Place to Live?

Q   *Thinking generally, which of the items on this list would you say are most important in making somewhere a good place to live? You can choose up to five*

% Select

Item	Value
Low level of crime	64
Health Services	47
Clean Streets	37
Affordable decent housing	36
Education provision	29
Shopping facilities	29
Low level traffic congestion	26
Public transport	26
Open spaces	25
Activities for teenagers	20

© 2017 Ipsos.   **Base: 596,000 BVPI survey responses**

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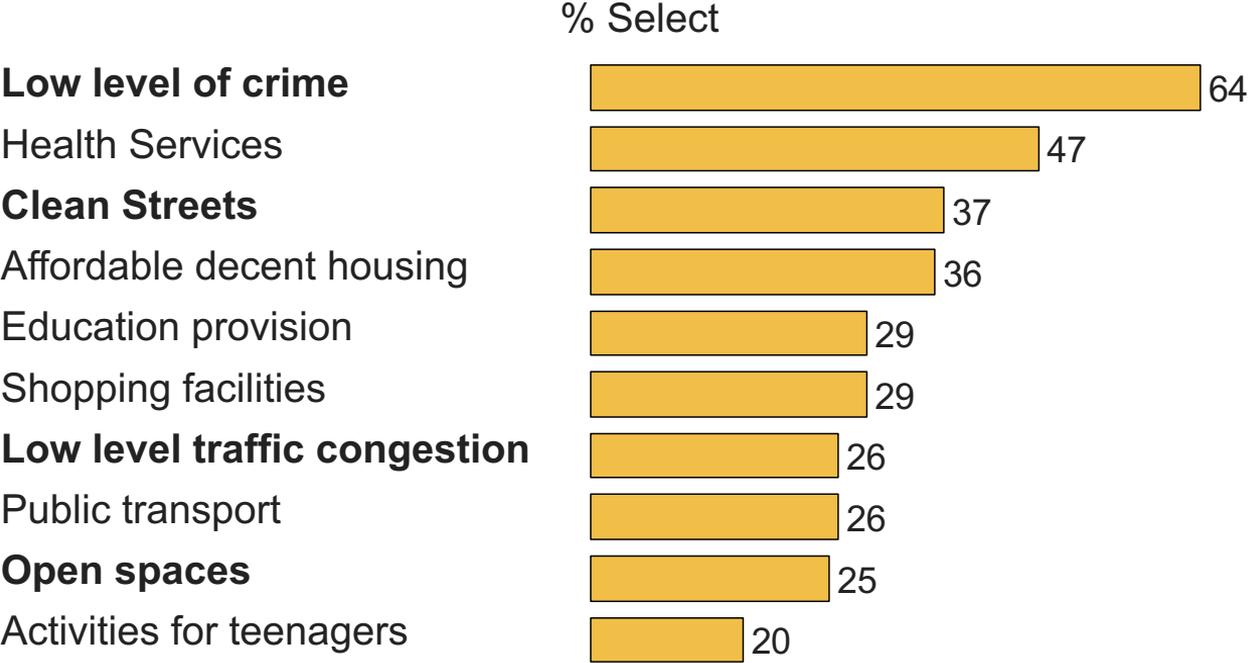
Please select the top five attributes that you believe makes somewhere a good place to live…

Attribute	Percentage
Feeling safe	73%
Affordable decent housing	52%
High quality health services	46%
Reliable and efficient public transport	40%
Access to the natural environment	40%
Shopping, leisure and dining experiences	35%
A strong sense of community	31%
Connectivity	28%
Good job prospects	28%
A lack of road congestion	25%
High quality education opportunities	24%
Social cohesion	22%
Opportunity for all	21%
A prosperous economy	17%
Sports and recreation	10%
Museums, galleries, festivals	8%

https://www.ipsos.com/en-au/life-australia-2017

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Most prefer to live in streets not tower blocks

Londoners want terraces, not high-rise

Which, if any, of the following types of housing do you think is the <u>most</u> suitable for meeting the needs of Londoners?
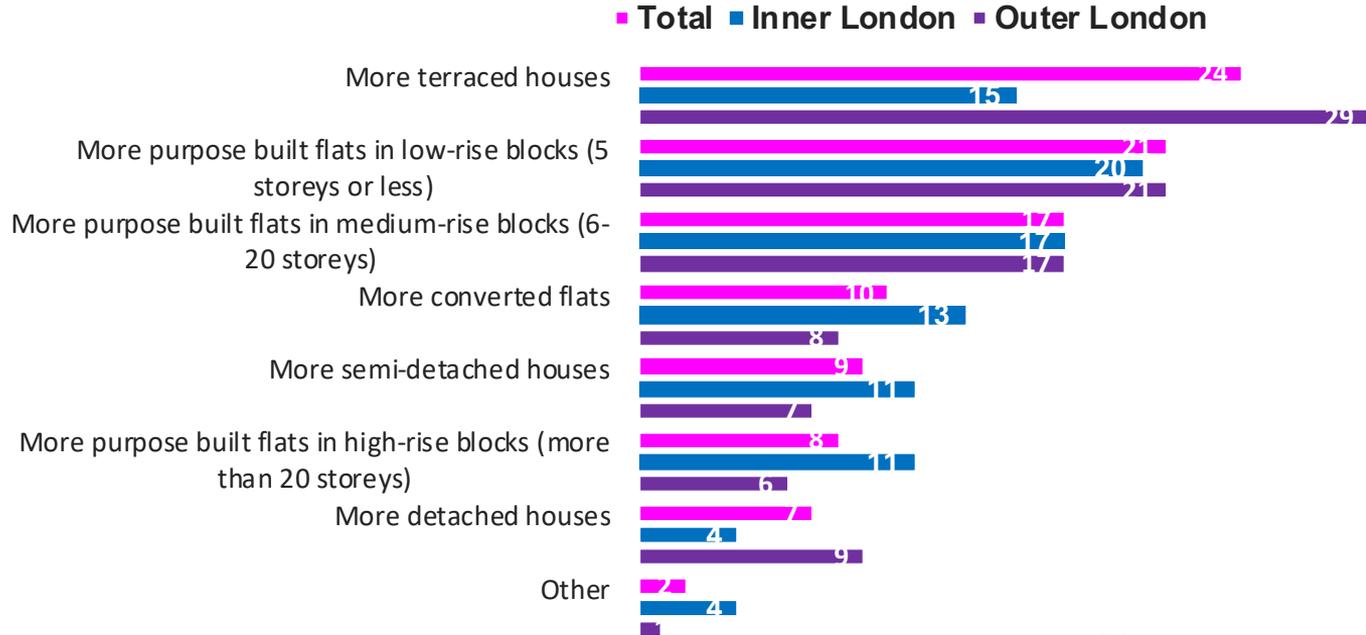
■ **Total** ■ **Inner London** ■ **Outer London**

Housing type	Total	Inner London	Outer London
More terraced houses	24	15	29
More purpose built flats in low-rise blocks (5 storeys or less)	21	20	21
More purpose built flats in medium-rise blocks (6-20 storeys)	17	17	17
More converted flats	10	13	8
More semi-detached houses	9	11	7
More purpose built flats in high-rise blocks (more than 20 storeys)	8	11	6
More detached houses	7	4	9
Other	2	4	

BASE: 504 ADULTS 15+ IN GREATER LONDON, 29 JAN-26 FEBRUARY 2016; INNER LONDON (186), OUTER LONDON (318)

GAME CHANGERS   SOURCE: IPSOS MORI

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Six out of ten want limits on tall buildings

To what extent, if at all, do you agree or disagree with the following statements.....?

There should be more limits placed on the <u>height</u> of new tall buildings being built or planned in London

There should be more limits placed on the <u>number</u> of new very tall buildings with 50 or more storeys being built or planned in London
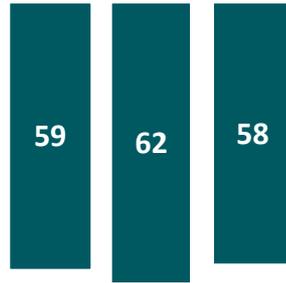
There should be no limits on the <u>number</u> of new very tall buildings with 50 or more storeys being built or planned in London

% Agree

	Total	Inner London	Outer London
Height	59	62	57
Number	59	62	58
No limits	21	17	23

% Disagree

	Total	Inner London	Outer London
Height	16	19	15
Number	17	21	15
No limits	58	66	53

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SOURCE: IPSOS MORI

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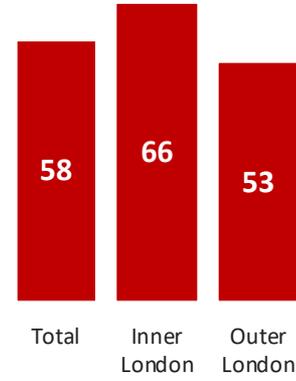
49% in inner London say too many tall buildings

According to the latest research, there are nearly 270 buildings of over 20 storeys currently under construction, planned or proposed, including 25 that are between 50 and 70 storeys high.

Do you think the number of new tall buildings over 20-storeys currently under construction, planned or proposed is too much, too little or about right?
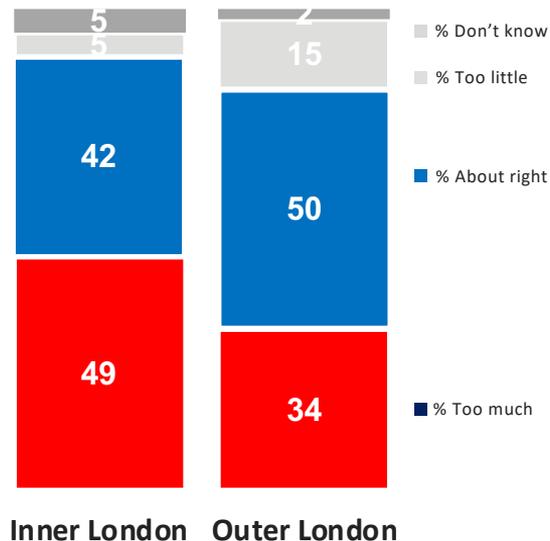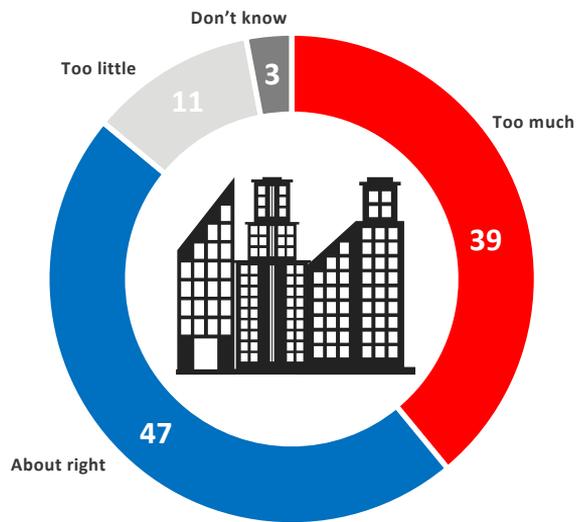
Don't know **3**

Too little **11**

Too much **39**

About right **47**

	Inner London	Outer London
% Don't know	5	2
% Too little	5	15
% About right	42	50
% Too much	49	34

Inner London   **Outer London**

Base: 504 adults 15+ in Greater London, 29 Jan-26 February 2016; Inner London (186), Outer London (318)

SOURCE: IPSOS MORI

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Bringing systems to life

Dialogue participants discussed:

- 6 city systems
- 3 integrated future scenarios
- 10 technologies
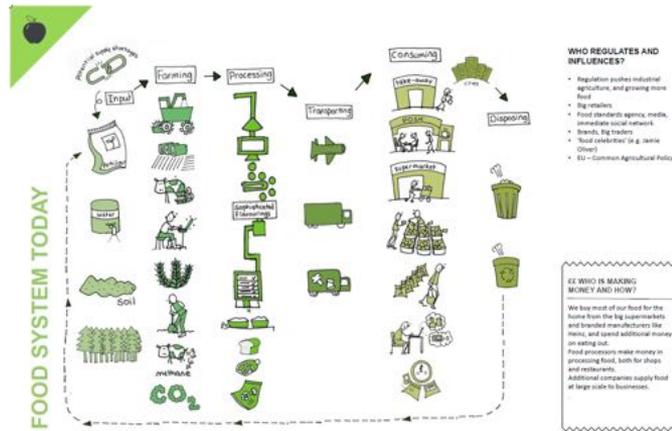
Here is an example of how city systems might evolve in the future through technology
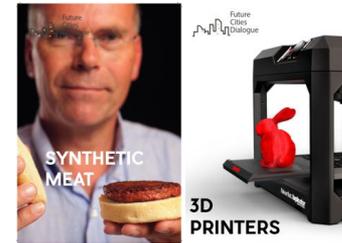
3D food printing at home

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Key principles for the vision of future cities

KEY VALUES EMERGING FROM CITIZEN DISCUSSIONS OF URBAN FUTURES

Equality of access to services	Encourage social interaction	**Grass roots innovation**	Secure & reliable technology	**'Natural' food**
Avoid loss of basic skills	**Local governance but central oversight**	Support art & culture	**Efficient use of resources**	Allow for individual choices
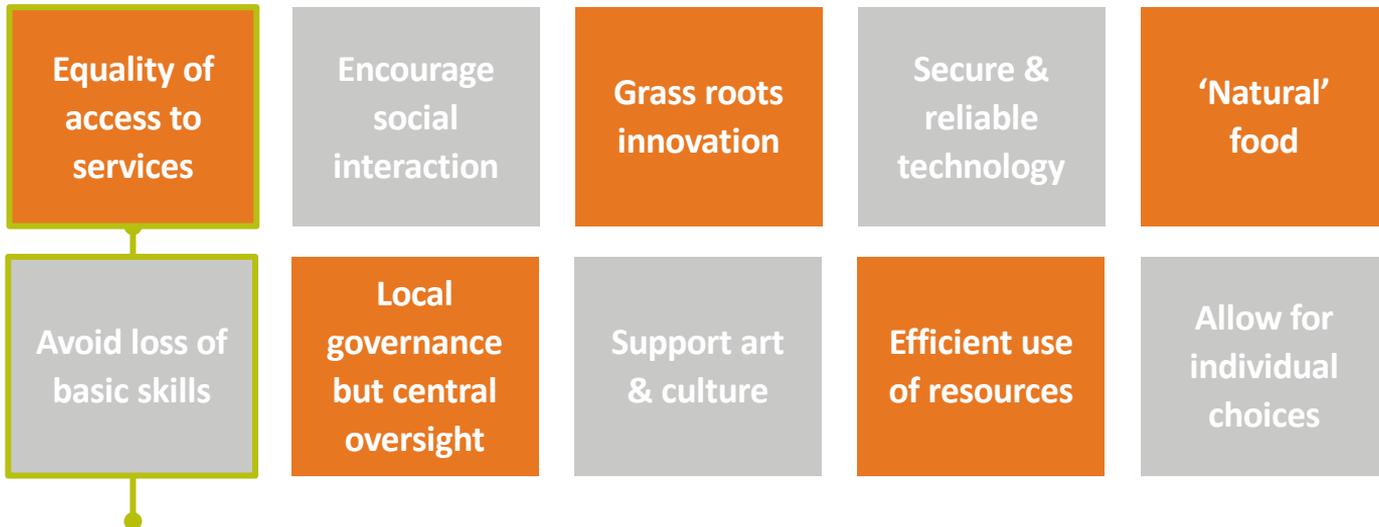
Most important principles for citizens

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Key principles underpinning urban life

KEY VALUES EMERGING FROM CITIZEN DISCUSSIONS OF URBAN FUTURES

Equality of access to services	**Local governance but central oversight**	**Grass roots innovation**	**Efficient use of resources**	**'Natural' food**
No citizens left behind by lack of access to technology or resources	Local decision-making but government oversight, particularly around health	Use innovation to spark community projects & resource sharing	Renewable energy and waste reduction and re-use to protect environment	Avoid losing naturalness of food, and keep its social and cultural aspects

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Key principles for use of technology

KEY VALUES EMERGING FROM CITIZEN DISCUSSIONS OF URBAN FUTURES

| Avoid loss of basic skills	Encourage social interaction	Support art & culture	Secure & reliable technology	Allow for individual choices
Use technology to make life easier, but avoid losing skills e.g. cooking	Use technology to aid efficiency but not to replace all face-to-face interaction	Use innovation to support art & culture, not just productivity & efficiency	Data sharing can offer tailored services but needs to be secure	Smart devices can encourage positive behaviour but allow 'nudges' to be ignored

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Technology revolution in our future cities

CITIZEN PREFERENCES AROUND APPLICATION OF NEW TECHNOLOGIES

More positive reactions ← → **Less positive reactions**

DRIVERLESS CARS

3D PRINTERS

PERSONAL HEALTH TRACKERS

SMART HOUSEWARE

BIOMETRIC TRANSPORT CARDS

PORTABLE BATTERY PACK

VIRTUAL DOCTOR

DRONES

SMALL SCALE NUCLEAR REACTORS

SYNTHETIC MEAT

Based on qualitative exercise indicating top-of-mind consumer reactions & preferences

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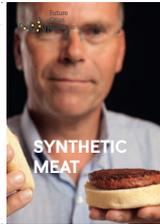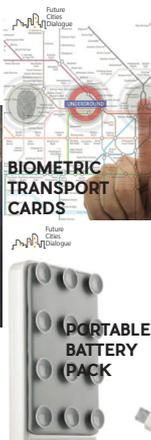
In conclusion - change is coming

- Clean, safe, green top concerns – ahead of public health (but..)
- Technology changes fast
- Infrastructure more slowly
- Transparency and lack of trust…
- Greatest human needs unchanged
- Things aren't so bad
- Good luck!

Thank you

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