YOUTHFULCITIES

**YOUTHFULCITIES
GLOBAL URBAN MILLENNIAL SURVEY 2016**

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Co-Founders of YouthfulCities

## GLOBAL URBAN MILLENNIAL SURVEY 2016

## LETTER FROM THE CO-FOUNDERS

Our 2016 Urban Millennials Survey gets at the pulse of urban youth globally. Now in its third year the Survey is bigger and deeper than ever. Back in 2014, we used the survey to answer a simple question. What is important to youth about their city? In 2015 we added a performance dimension to help us establish a city's strengths and weaknesses according to Millennials.

For 2016 the Survey reveals a more comprehensive view of the big issues youth want cities to focus on. It showcases the benefits of cities being youthful and it highlights a looming youth retention problem cities may face. We asked young people 15-34 about how they see their cities and their municipal governments. This report also offers a unique perspective on the lives of urban Millennials - from work to play and in between.

If you are an urban leader and you want your city to be stronger Millennials are critical to your success. This report starts an important dialogue and gives a unique and important window into the future of cities from a youthful vantage point.

To complete one of the biggest surveys of its kind, we recruited and trained 50 Millennial Research Fellows around the world and let them loose in their cities. Their goal: capture the voice of young people.

We worked together to craft a strategy to include the most diverse set of voices possible. We mapped out local neighbourhoods. Monitored the demographic samples as they rolled in. Hosted round tables, workshops, and information sessions. We hit the streets, schools, shopping malls, playgrounds, festivals, offices and social media for 6 months. They deserve a huge thanks for their hard work.

From the slums of Nairobi to the inner city schools of Caracas, the bustling streets of Beirut to crowded streets of New York, London and Shanghai, Millennials responded with a resounding, yes. They want to live, work and play in more youthful cities. This Report represents the opinions of approximately 15,000 youth from 34 cities across all global regions. The insights start at a global level, but we have full regional data as well. And for each city we are publishing a free snapshot summary which can be downloaded at www.youthfulcities.com.

We invite you to use this Millennial Survey Report to inspire more youthful possibilities for your city. Use it to engage young people to build prosperous, more youthful cities. And, we will be there to help get you started.

# JUST THE HEADLINES

## Top 10 most important insights for 2016

**1** A Youthful city has big benefits according to Millennials, especially economically and socially. ~50% of Millennial feel a youthful city is happier and has more jobs available.

**2** Only 36% of Millennials believe they live in a youthful city so there is work to do.

**3** The good news is that the 36% who believe they live in a youthful city can be a real asset to urban leaders. Those Millennials are happy, healthy, want to contribute and want to stay in their cities.

**4** Municipal Governments are not seen as youthful (only 16%) possibly because only 17% of Millennials feel municipal governments are listening to them a lot. Too bad, because 55% of youth want to participate in meeting about their city's future.

**5** Keeping Millennials in their current city will be challenging. 58% of Millennials say they will leave the city within the next 10 years, just as they become a core tax base, work force between 25-44 year olds.

**6** Safety, Education and Health are most important to Millennials, likely aligning with the rest of the urban population. Fashion and Food and Nightlife are at the bottom of the list.

**7** Cities perform well on some important attributes like education, but poorly in environment, employment and affordability.

**8** In terms of urgent priorities, Millennials want cities to focus on Affordability, Employment and Safety.

**9** Urban Millennials consider themselves to be generally happy, healthy and entrepreneurial, but struggle to eclipse their parents financially. Youth believe they may not have the skills needed to succeed. They are fully ensconced in mobile and internet media as old mediums continue to lose relevance.

**10** *Congratulations to our first-ever Urban Millennial Award recipient cities.*
    i.    Most Youthful Mayor: London
    ii.   Municipal Government Hears Youth Award: Montreal
    iii.  Skateboard City Award: Addis Ababa
    iv.   Most entrepreneurial Millennials award: Mumbai
    v.    Financial success award: Moscow
    vi.   Cyclist Award: Berlin
    vii.  Public Riders Award: Warsaw
    viii. Start-Up Spirit Award: Kinshasa

*"Youth is essential in providing innovative, novel and creative ideas to solve the current problems of Quito. The talent that youth encompass, with their constant and active participation, will help us build a city of involved citizens that develop alternatives to improve our overall quality of life. Our city is a place for everyone without prejudice, and as such, everyone is obliged to generate a sustained commitment; a commitment for Quito"*

*– **Mauricio Rodas**, Mayor of Quito*

## Defining a Youthful City: A Millennial Perspective

In 2014 we launched the world's first global cities ranking based from a youth perspective. Millennials around the world were consulted and had an active role in creating the YouthfulCities Index. At its core are 20 categories or what we call "Urban Attributes" (see below) that youth feel are important to make a great city in which to live, work and play.

We believe that what makes a city youthful goes beyond simply infrastructure - it is also about the attitude of the city and the youth within it, perhaps all citizens. So this year, in addition to continuing to clarify, define and prioritize the attributes that make a city youthful, we also set out to put a definition to the youthful attitude.

We started with a working definition created from years of working with youth around the world. We then asked youth to confirm this definition. And they did - in resounding numbers, with only 3% offering up other terms.

What is it:
- Dynamic
- Inventive
- Curious
- Connected
- Open
- and, Playful

As you will see in the pages to follow, we use the Urban Attributes to help define what's important and how a city performs. We use the Urban Attitudes to define how Millennials perceive their mayors, governments, their cities overall and themselves. Together Attributes and Attitudes form a useful platform for urban leaders to build more youthful cities. *Let's get going.*

## ATTRIBUTES & ATTITUDES

Since 2013 we have asked over 30,000 Millennials around the world to tell us what they think makes a city youthful.

Based on their cumulative responses we developed two distinct ways of understanding our cities - Attributes and Attitudes.
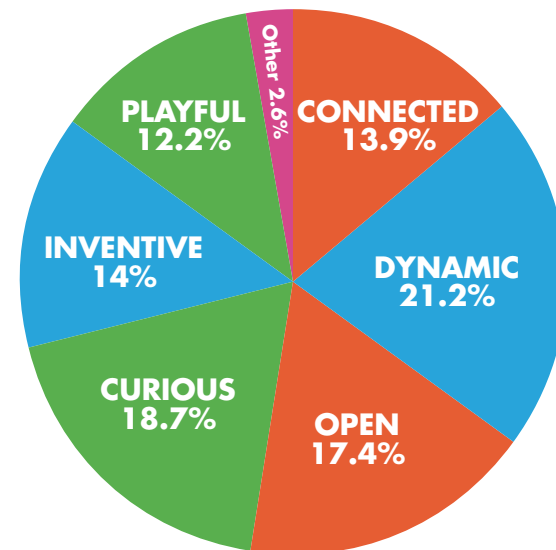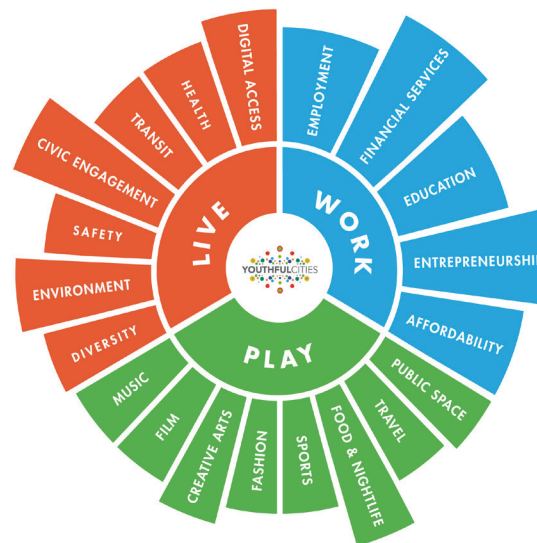


Which of the following defines the word "youthful" for you?
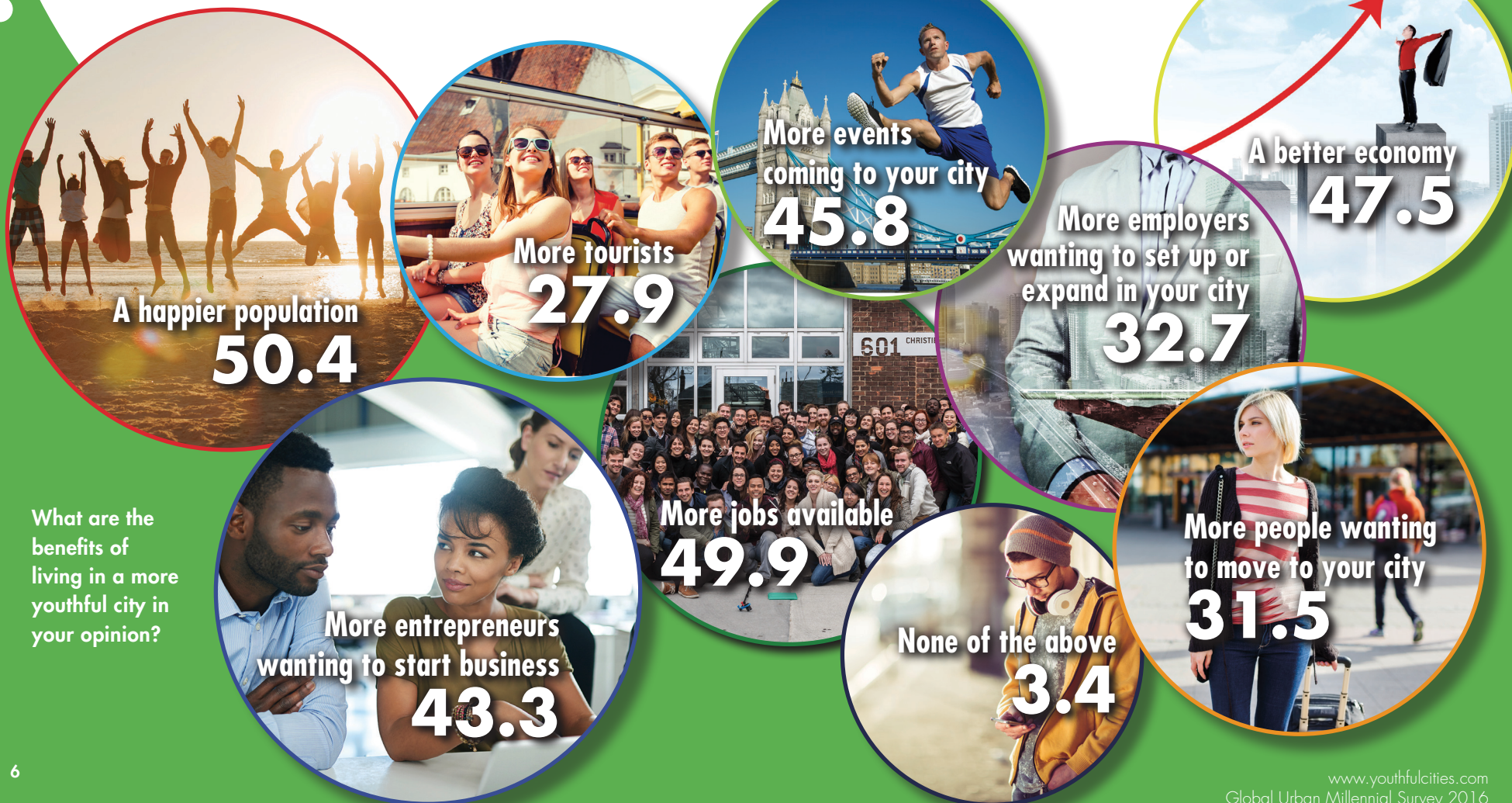
# CITIES IN THE YOUTHFULCITIES MILLENNIAL SURVEY

ST. PETERSBURG

VANCOUVER
SEATTLE

MONTREAL

BERLIN
MOSCOW

TORONTO

LONDON
WARSAW
BUDAPEST
BUCHAREST

CHICAGO

PRAGUE

PHILADELPHIA
NEW YORK CITY

BARCELONA
BELGRADE

LOS ANGELES
WASHINGTON

MADRID
ISTANBUL

SAN DIEGO

ATHENS

TOKYO

DALLAS

SHANGHAI

CAIRO
KARACHI
DELHI

MEXICO CITY

DUBAI

HONG KONG

KHARTOUM

MANILA

MUMBAI

CARACAS

ABUJA

BANGALORE
BANGKOK

MEDELLIN

ACCRA
LAGOS
ADDIS ABABA

QUITO

SINGAPORE

NAIROBI

KINSHASA

BRASILIA

DAR ES SALAAM

JAKARTA

LIMA

JOHANNESBURG

DURBAN

SYDNEY

MELBOURNE

## Legend

Cities included in the global survey sample

- **EUROPE** ●
- **ASIA/AUSTRALIA** ●
- **USA/CANADA** ●
- **LATIN AMERICA** ●
- **MIDDLE EAST** ●
- **AFRICA** ●

Cities that participated but were not included in the final sample ●

## SAMPLE DETAILS

Total Global Respondents across 55 cities: **18,800**

Total respondents in final 34 cities with minimum of 150 responses/city: **15,931**

Final weighted sample: **15,030**

Collection timing: **August 2015-January 2016**

Collection Method: **Through online/mobile and paper-based intercept surveying.**

# 1 MILLENNIALS BELIEVE THAT THERE ARE ECONOMIC BENEFITS TO BEING A YOUTHFUL CITY.

## Of all the possible benefits of a youthful city, Millennials prioritize the economic benefits

The Survey shows that Millennials make a direct link between having a youthful city - a dynamic, curious, open, inventive, connected and playful city - and economic and financial benefits including higher employment rates, more jobs, a stronger economy and a thriving environment for small business and entrepreneurship. Other benefits include having a happier population, more events, increased tourism and attracting talent. Only 3% of youth did not see any of these benefits for a youthful city.

**What are the benefits of living in a more youthful city in your opinion?**

A happier population
**50.4**

More tourists
**27.9**

More events coming to your city
**45.8**

A better economy
**47.5**

More employers wanting to set up or expand in your city
**32.7**

More entrepreneurs wanting to start business
**43.3**

More jobs available
**49.9**

None of the above
**3.4**

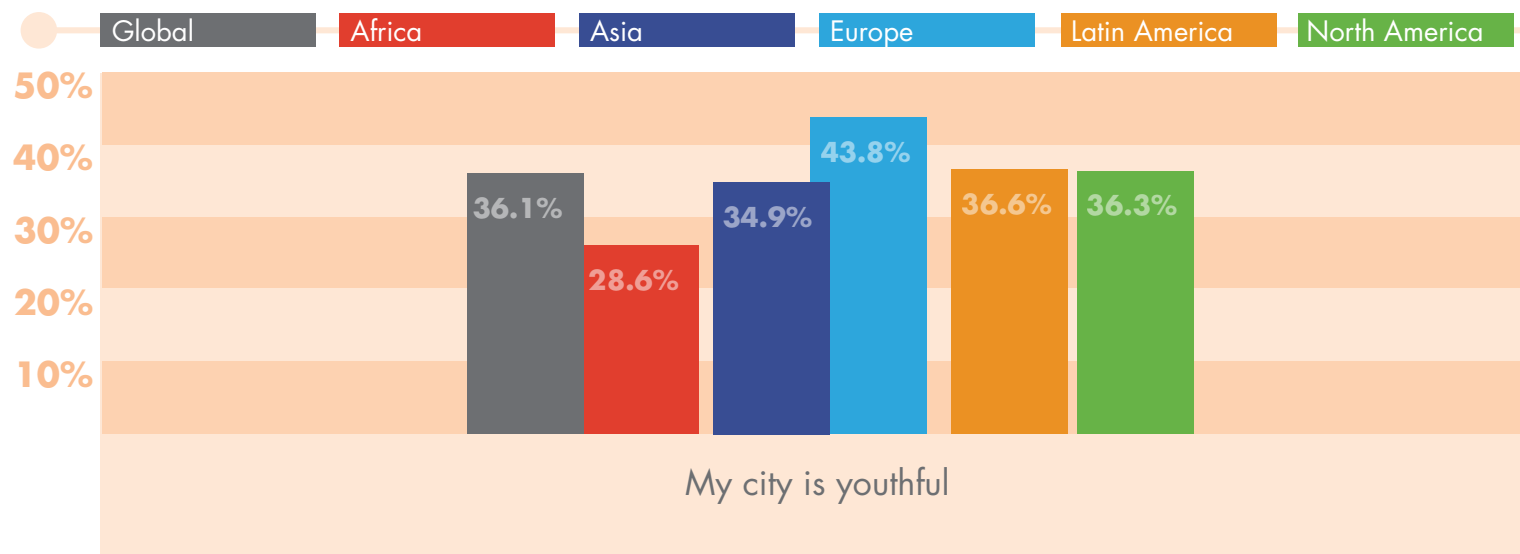More people wanting to move to your city
**31.5**

## 2 UNFORTUNATELY ONLY 36% OF MILLENNIALS BELIEVE THEY LIVE IN A YOUTHFUL CITY SO THERE IS WORK TO DO.

Youthful cities are certainly desirable, but for most Millennials it's still a goal versus a reality. This should provide motivation for youth and governments alike to actively work to build a more youthful infrastructure in their cities.

The regional data provides an interesting perspective about the influence of age on youthfulness. The youngest cities based on median population age are situated in Africa. It appears that being "youthful" is more of a goal in these cities, whereas in the older cities - European cities - youthful cities are perceived to be more of a reality.

| Global | Africa | Asia | Europe | Latin America | North America |
|---|---|---|---|---|---|

**My city is youthful**

- Global: 36.1%
- Africa: 28.6%
- Asia: 34.9%
- Europe: 43.8%
- Latin America: 36.6%
- North America: 36.3%

How youthful is your city on a scale of 1-10 where 10 is very youthful?

## 3 THE GROUP WHO DO BELIEVE THEY LIVE IN A YOUTHFUL CITY ARE A TREMENDOUS RESOURCE FOR URBAN PROSPERITY.

### Finding effective ways to collaborate with the Millennial generation could prove to be the key to building more youthful cities

We discovered that Millennials who believe their cities to be "youthful" have the characteristics of a model citizen. They rate their city's performance higher on almost every Attribute including Safety, Affordability, Environment, Health, Good Jobs and of course, Civic Engagement. They are more likely than their counterparts to say that their city listens to them a lot, that their local governments are youthful, that they want to stay in their city forever.

They themselves report very good health, being physically active and happy and isn't that what every city needs!
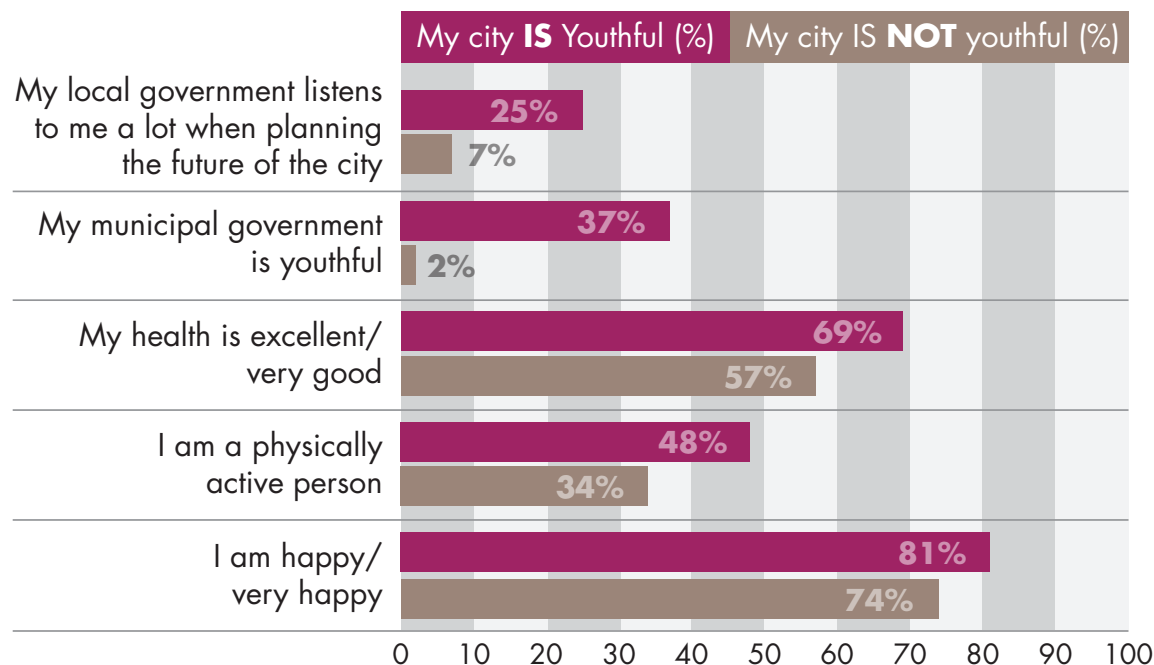
They are also more likely than their counterparts to say:

- That their city listens to youth "a lot"
- Their municipal government is youthful
- They want to stay in their city forever
- They have excellent or very good health
- They're a physically active person
- That they are happy – over 80% of them!

| | My city IS Youthful (%) | My city IS NOT youthful (%) |
|---|---|---|
| My local government listens to me a lot when planning the future of the city | 25% | 7% |
| My municipal government is youthful | 37% | 2% |
| My health is excellent/very good | 69% | 57% |
| I am a physically active person | 48% | 34% |
| I am happy/very happy | 81% | 74% |

0 10 20 30 40 50 60 70 80 90 100

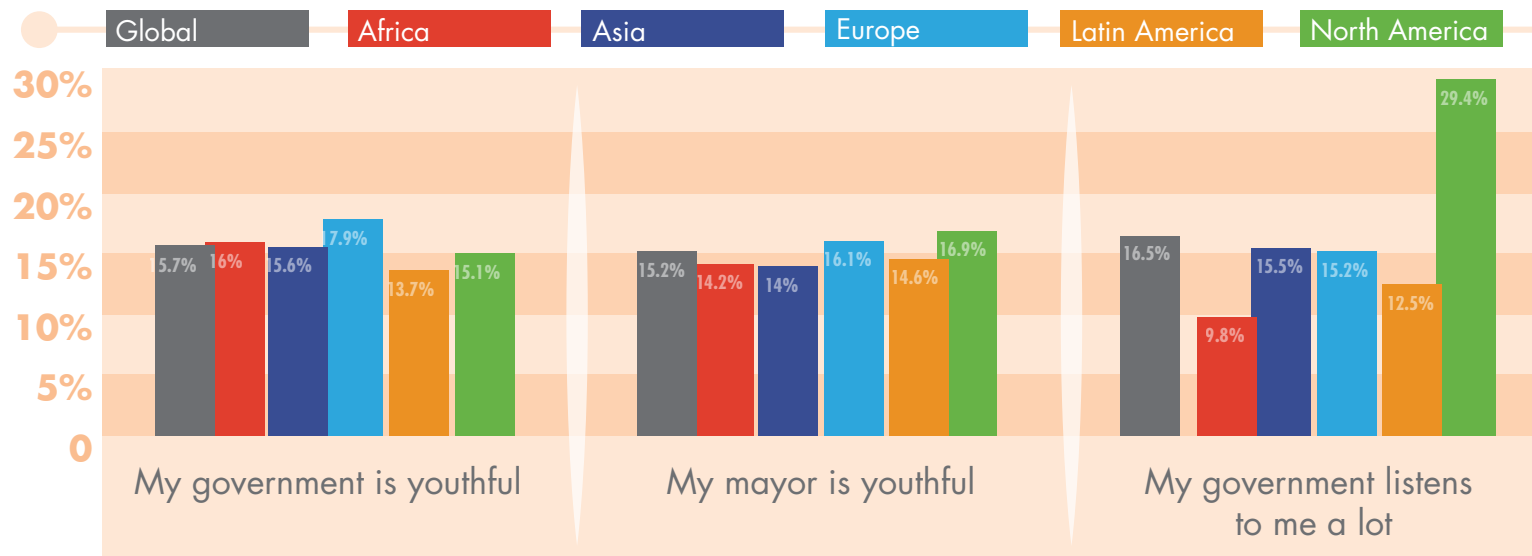# 4 ONLY 16% OF MUNICIPAL GOVERNMENTS ARE SEEN AS YOUTHFUL.

**Maybe this is a result of only 17% of Millennials feel municipal governments are listening to them. Too bad, because 55% of youth want to participate in meeting about their city's future**

So why don't youth feel their city is youthful? One reason may be that only about 16% see their municipal government or their mayor as youthful. Another may be that only 17% feel they are listened to. Still another may be that they don't feel that their government's priorities are the same as theirs. Or perhaps it is all of these reasons - regardless - it is of

great benefit for a city to be seen as youthful not only because of the benefits it brings to a city but because of the type of youth that a youthful city attracts.

We know that because youth don't believe their governments are youthful, perhaps this leads to the 83% of youth thinking that their government

doesn't listen to them. Do they want to be heard? Yes, 55% say they would participate. There is a major disconnect here and an even larger missed opportunity to utilize the skills and talents of young people in building the future of our cities, today.



Legend: Global | Africa | Asia | Europe | Latin America | North America

**My government is youthful**
- Global: 15.7%
- Africa: 16%
- Asia: 15.6%
- Europe: 7.9%
- Latin America: 13.7%
- North America: 15.1%

**My mayor is youthful**
- Global: 15.2%
- Africa: 14.2%
- Asia: 14%
- Europe: 16.1%
- Latin America: 14.6%
- North America: 16.9%

**My government listens to me a lot**
- Global: 16.5%
- Africa: 9.8%
- Asia: 15.5%
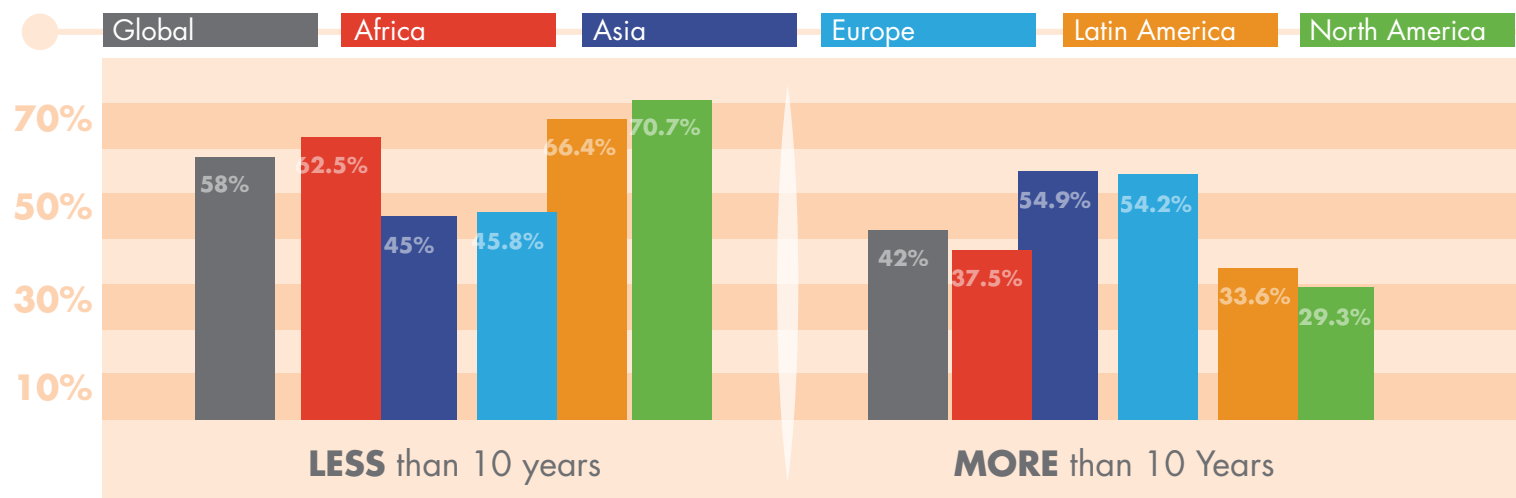- Europe: 15.2%
- Latin America: 12.5%
- North America: 29.4%

How youthful is your city on a scale of 1-10 where 10 is very youthful?
How youthful is your municipal government on a scale of 1-10 where 10 is very youthful?
How youthful is your Mayor on a scale of 1-10 where 10 is very youthful?

# 5 KEEPING MILLENNIALS IN THEIR CURRENT CITIES WILL BE CHALLENGING. 58% OF URBAN MILLENNIALS SAY THEY WILL LEAVE THEIR CITY WITHIN THE NEXT 10 YEARS.

From the perspective of Millennials, there are no negative consequences to their increasing mobility. It opens up more opportunities, experiences, learning and self-development. Youth may leave for short term opportunities like post secondary education, short term jobs or travel and then return to their cities. They may be tempted to leave for good. The more youthful a city is, the more likely it may be to draw a youth

back to their city or to not leave in the first place. And this is key for cities to attract and retain the youth they need to continue to grow - recognize they may leave but strive to get them to return. For the almost 40% of Millennials who have no desire to leave cities must show them why they were smart to stay.

Millennials and their younger counterparts can and will "vote with their feet," and this is a global phenomenon. The tide of this demographic shift will have innumerable consequences on the prosperity of cities. From a municipal perspective this group is critical to secure. Not only do they represent the cultural and economic future of urban areas, they also provide a critical and lucrative tax base.

| Global | Africa | Asia | Europe | Latin America | North America |

**70%**

**50%**

**30%**

**10%**

58%   62.5%   45%   45.8%   66.4%   70.7%

42%   37.5%   54.9%   54.2%   33.6%   29.3%

**LESS** than 10 years          **MORE** than 10 Years

# HOW TO MAKE CITIES MORE YOUTHFUL?

**So what if municipal governments had the insight and foresight, not to mention information and tools, to create the best possible versions of themselves?**

*Here are 4 steps* to get cities started and a framework that can be used to build more youthful cities:

- What's most important to young people: locally and regionally?

- How does your city perform on the most important Urban Attributes, and how does it compare to others?

- What do Millennials think is the biggest and most urgent issue that needs to be addressed in their city, right now?

- Who are these Millennials, especially the ones who want to be involved - stakeholders need this understanding to make the right connections
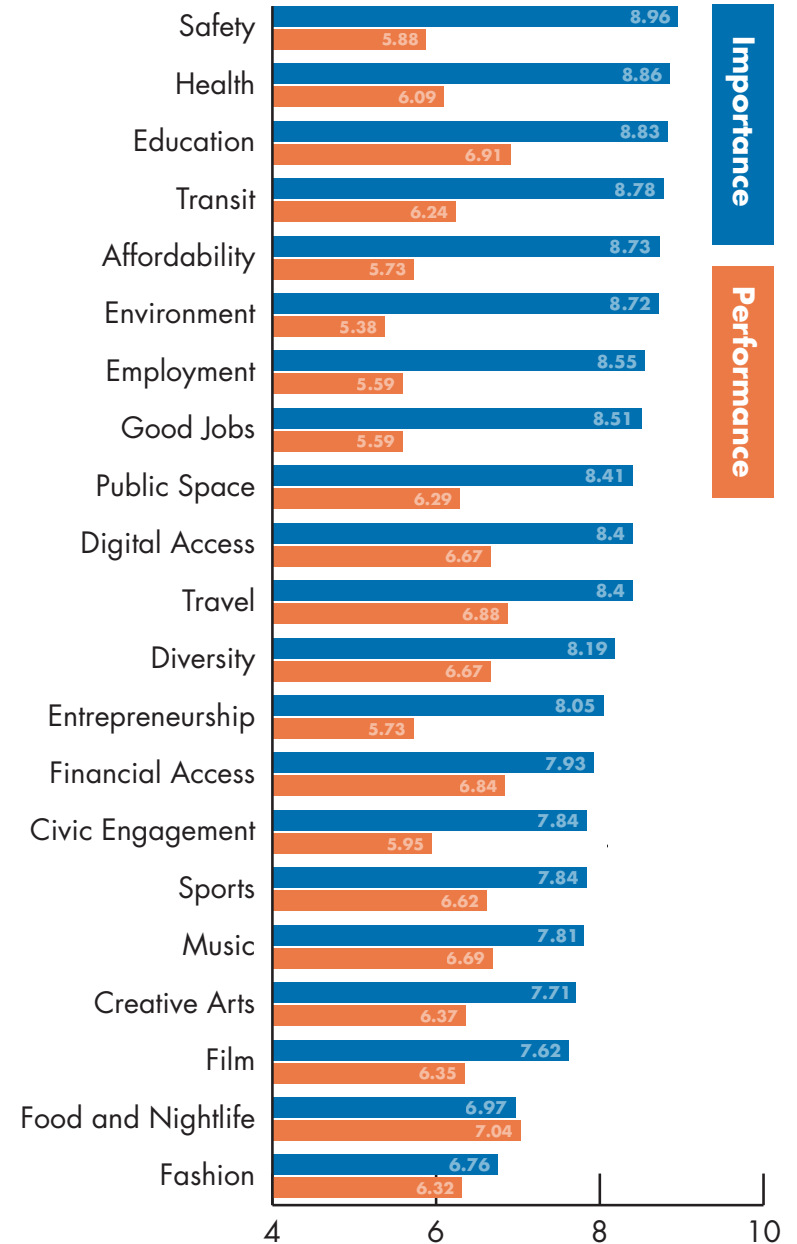
# IMPORTANCE VS. PERFORMANCE

*What's most important to Millennials: locally and regionally?*

**The YouthfulCities Millennials Survey** was designed to better understand the top urban priorities of young people, not only what is most important but how they see their cities performance across a set of defined Urban Attributes. Understanding what Millennials believe, prioritize and aspire to provide critical insights into the lives they lead and how best to engage them. This research identifies opportunities and challenges in the urban setting that can be utilized to regenerate youthfulness in cities around the world.

## Urban Attribute

| Attribute | Importance | Performance |
|---|---|---|
| Safety | 8.96 | 5.88 |
| Health | 8.86 | 6.09 |
| Education | 8.83 | 6.91 |
| Transit | 8.78 | 6.24 |
| Affordability | 8.73 | 5.73 |
| Environment | 8.72 | 5.38 |
| Employment | 8.55 | 5.59 |
| Good Jobs | 8.51 | 5.59 |
| Public Space | 8.41 | 6.29 |
| Digital Access | 8.4 | 6.67 |
| Travel | 8.4 | 6.88 |
| Diversity | 8.19 | 6.67 |
| Entrepreneurship | 8.05 | 5.73 |
| Financial Access | 7.93 | 6.84 |
| Civic Engagement | 7.84 | 5.95 |
| Sports | 7.84 | 6.62 |
| Music | 7.81 | 6.69 |
| Creative Arts | 7.71 | 6.37 |
| Film | 7.62 | 6.35 |
| Food and Nightlife | 6.97 | 7.04 |
| Fashion | 6.76 | 6.32 |

# IMPORTANCE VS. PERFORMANCE

*What's most important to Millennials: locally and regionally?*

| IMPORTANCE RATINGS | GLOBAL | AFRICA | ASIA | EUROPE | LATIN AMERICA | NORTH AMERICA |
|---|---|---|---|---|---|---|
| Safety | 8.96 | 9.09 | 9.09 | 9.04 | 9.37 | 8.22 |
| Health | 8.86 | 8.95 | 8.83 | 9.07 | 9.37 | 8.06 |
| Education | 8.83 | 9.03 | 8.85 | 8.89 | 9.43 | 8.09 |
| Transit | 8.78 | 8.63 | 8.8 | 9.14 | 9.26 | 8.09 |
| Affordability | 8.73 | 8.8 | 8.73 | 8.98 | 9.01 | 8.14 |
| Environment | 8.72 | 8.8 | 8.89 | 8.8 | 9.15 | 7.96 |
| Employment | 8.55 | 8.8 | 8.6 | 8.76 | 8.97 | 7.63 |
| Good Jobs | 8.51 | 8.67 | 8.63 | 8.28 | 9.02 | 7.95 |
| Public Space | 8.41 | 8.37 | 8.2 | 8.7 | 8.93 | 7.86 |
| Digital Access | 8.4 | 8.42 | 8.52 | 8.62 | 8.78 | 7.67 |
| Travel | 8.4 | 8.57 | 8.31 | 8.74 | 8.88 | 7.51 |
| Diversity | 8.19 | 8.35 | 8.36 | 7.6 | 8.73 | 7.9 |
| Entrepreneurship | 8.05 | 8.6 | 8.22 | 7.83 | 8.88 | 6.74 |
| Financial Access | 7.93 | 8.36 | 8.05 | 7.56 | 8.28 | 7.39 |
| Civic Engagement | 7.84 | 8.2 | 7.96 | 7.44 | 8.47 | 7.15 |
| Sports | 7.84 | 8.18 | 7.88 | 7.76 | 8.44 | 6.91 |
| Music | 7.81 | 7.68 | 7.67 | 7.89 | 8.43 | 7.37 |
| Creative Arts | 7.71 | 7.76 | 7.52 | 7.57 | 8.47 | 7.2 |
| Film | 7.62 | 7.55 | 7.66 | 7.88 | 8.24 | 6.76 |
| Food & Nightlife | 6.97 | 6.82 | 6.96 | 7.21 | 7.24 | 6.64 |
| Fashion | 6.76 | 7.53 | 7.3 | 6.25 | 6.53 | 6.19 |

How important is attribute to you on a scale from 1-10?

# IMPORTANCE

*The Top 5 Priorities: Safety, Education, Health, Transit and Affordability most important to Millennials*

*These five Urban Attributes* not only had the highest ranking of Importance by global Millennials, they were mere decimal points apart, scoring between **8.73** to **8.96** on a ten point scale. However it is important to note that even the lowest scoring Attribute which was Fashion came in at **6.76/10** which may not be as big a gap as might be expected. What is key to understand is that all of these Attributes are important to youth, what they are doing in this survey is prioritizing them for municipalities to understand. Surprising to some might be that Millennials prioritized Attributes in the Live and Work Categories over the Play Category.

Take for example, Digital Access which finishes **10th** overall with a score of **8.4/10**. It falls behind a number of factors that aren't typically thought of as youthful. So while youth are often stereotyped as being

obsessed with social media and inseparable from their phones, it's actually the case that Millennials are much more concerned with key urban issues for all citizens like safety transit and affordability.

Similarly, Public Space **(8.41)** and Travel **(8.4)** are the two highest scoring Play Attributes. Access to Travel, or the ability to access nearby cities and regions efficiently, shows up in 11th place overall. In giving Travel this result, Millennials are pointing out their concern with mobility, with being able to exercise their freedom of movement and passage into other regions.

Overall, the results reveal that though there is a hierarchy of needs, all the Urban Attributes are important to Millennials.

# SAFETY

*Concerns about urban safety are on the rise.* This issue has plagued cities for the better part of the last century. For the second year in a row, Millennials rate Safety as the most important Urban Attribute globally. Over the last decade we've seen and heard a steady narrative around mayors cleaning up the streets, fighting crime, and improving access to public spaces and all the city has to offer. Is it working? Do youth believe that their cities are performing well on Safety?

They don't. Globally safety ranks **16th out of 21st** in performance with a score of **5.88/10** - one of the largest gaps between Importance and Performance of all Attributes. Regionally Latin America ranks Safety performance at the very bottom - 21st out of 21 Attributes - a clear challenge for these Latin American cities. Even North America ranks Safety Performance at 14 out of 21. In fact, all regions rank Safety Performance in the bottom 10 meaning cities have a long way to go.

"Insecurity in Mexico City is a problem that affects other areas. *In a city where safety cannot be guaranteed to its citizens, it's difficult for them to make the most of public spaces, to participate in democratic processes, to use public transport, to have access to a cultural life in an equitable way and with a real sense of what's public."* – *Mexico City*

*"There is unequal treatment of residents in the Chicago area (and much more widespread) that lead to a detriment in safety for all residents of Chicago. This lack of safety also affects the ability to get to school and work, access to healthcare, and people not directly in the high crime areas have negative perceptions of people who live there that also affects way of life."* – *Chicago*

DIGITAL ACCESS

HEALTH

TRANSIT

CIVIC ENGAGEMENT

SAFETY

ENVIRONMENT

LIVE

DIVERSITY
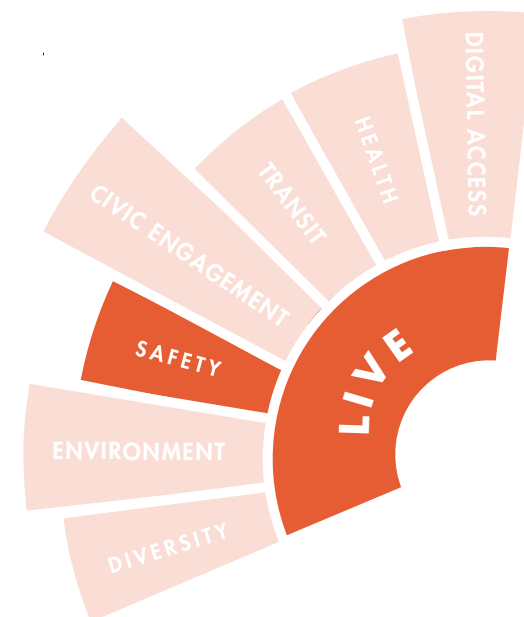
# HEALTH

*Access to Health Services remains a top priority for urban Millennials, scoring 8.86 overall.*

Given that almost two thirds of global youth say they are healthy or very healthy, their prioritization of health services may seem surprising. However, we believe that youth are looking at the issue of Access to Health Services much more broadly. This isn't about their personal health, but about access for their peers, their families, and their whole communities.

They may be familiar with studies like the one by the World Health Organization (WHO) which paint a bleak picture of global health access. An estimated 10 per cent of the world's population is affected by mental health disorders. **About one in five adults worldwide will be obese by 2025** if current trends continue, say public health experts. Sedentary lifestyles and food deserts in urban centres are certainly not helping. Layered on top of this is the rise of health epidemics that becoming more common in our globalizing world. Ebola, Zika, Sars, for example, wreak havoc on densely populated urban centres.

So do youth think cities are responding? No they don't. Globally youth rank their cities Performance at **14th out of 21** Attributes, clearly indicating there is much work to do. The gap between Importance and Performance is almost as wide as the Safety gap.

It is telling that on the two most important Attributes to youth, the cities Performance is far from meeting their expectations.

Some may argue that municipalities have a limited role in determining Access to Health Services. This may be true in some cities however that does not mean that cities do not have a vital role to play in the promotion of health through creation of clinics and facilities, through the Access to Public Spaces for physical activity, through the prioritization of access to healthy food options within their cities, through the creation of policies and programs which address the needs of those highest at risk from a health standpoint. It is not enough to say that health services aren't a municipal responsibility. They must recognize the importance that youth put on this area and act.

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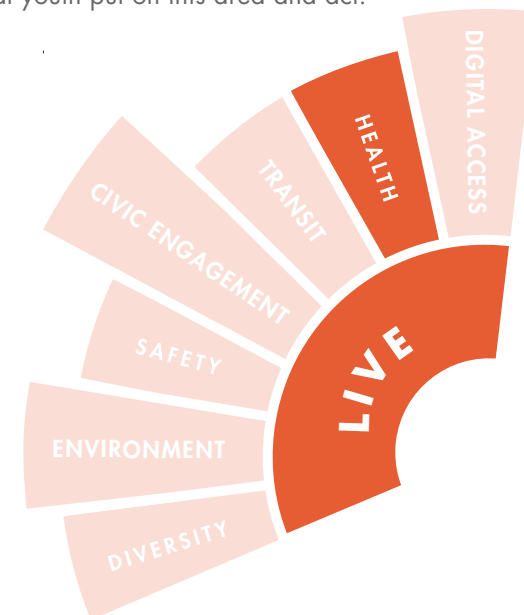
*Unlike Safety and Access to Health Services,* Access to Post-Secondary Education in cities is not only important to youth, cities are being seen to perform well. In fact, Millennials rank the Performance of cities on Access to Post-Secondary Education as 2nd - behind only Food and Nightlife. This should be very good news, right? Having a good education is vital in preparing youth for the future. But is the education they have access to preparing them for the jobs that are available?
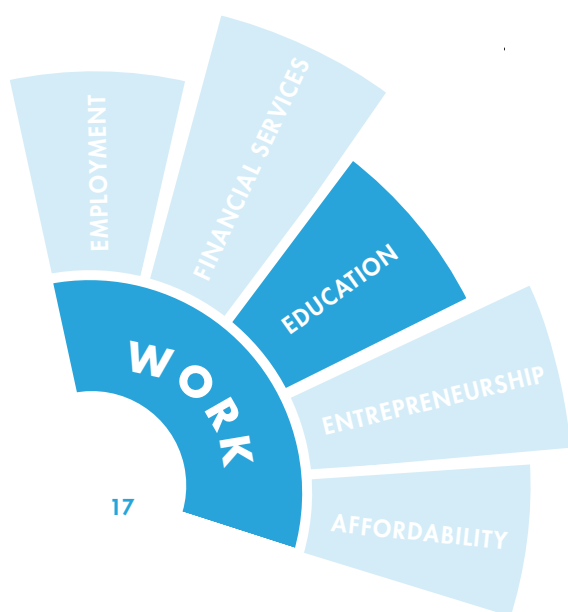
It appears that youth don't think so. **43%** of Millennials reported that they don't feel they have the skills to get the job they want, leading to the important question of whether the Post Secondary institutions are preparing the youth for the reality of the job market in their cities or their regions.

We also see a spirit of entrepreneurial zeal in our sample of global youth. Almost **40%** of global youth want to start their own business or organization at some point in their lives with the highest percentage coming out of Latin American and Africa.

Cities need to pay attention to this burgeoning sense of entrepreneurialism. While youth ranked Entrepreneurship 13th in Importance which is certainly lower than many other Attributes, they also ranked cities at the bottom in terms of Performance in Entrepreneurship with a ranking of 18 - even lower in Africa (21st) where interest in Entrepreneurship may be highest. It is of clear benefit to cities, businesses and Millennials to place greater emphasis on entrepreneurial opportunities.

*"This city provides some sort of education but it appears to be just so there will be people that have been through the system and graduated, not so that we can produce efficient and smart individuals."*
*– Addis Ababa*

*"If the next generation is more open, active, creative, critical, and with a sense of agency, they will overcome any obstacle they face. The priority is to rethink the educational system and to guarantee high quality education for all." – Mexico City*

EMPLOYMENT

FINANCIAL SERVICES

EDUCATION

WORK

ENTREPRENEURSHIP

AFFORDABILITY

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Global Urban Millennial Survey 2016

# TRANSIT

More and more we hear about the need for, and benefits of, a strong public transit system within cities - for economic benefits, health benefits, environmental benefits and more. Millennials agree, **ranking Public Transit fourth** in Importance on the Attribute list. Unfortunately globally it isn't performing up to its Importance ranking, **placing a lowly 13th** in the Performance Attributes.

More than ¾'s of global youth (76%) use Public Transit to get around their city, the highest usage being in Europe with **90%** and the lowest in North America at 65.7%. Even in Africa, where Public Transit is more likely to be a system of informal and private enterprises than a municipally run system, **72% of African youth** say they use Public Transit to get around. It is the most prevalent way that youth (and many others) travel around their cities and if they don't feel Transit is Performing well and therefore holding them back from doing what they want to do personally or professionally, the city may be at risk of losing them. And this is an issue not just impacting Millennial youth, businesses rely on Transit for a strong workforce and customer base. Without a safe, affordable, reliable transit system, retaining business is also at risk.

*"Public transport is not sufficient in the city. It should be the best tool for people to access other opportunities, like access to services, employment, recreation, etc., and to have a true spatial justice."*
*– Mexico City*

*"Intensive development of urban areas in combination with low quality of public transport deprive the citizens of the worthy alternative to the car driving. It causes the loss of the labor and free time spent in traffic jams and inefficient use of streets (as transport corridors, but not promenades with street commerce for the pedestrian movement. The ecological situation in the city is getting worse because of pollution from the motor transport. The image of the city also suffers from the excessive use of privately own vehicles as it causes the damage to historical buildings facades."*
*– St. Petersburg*

DIGITAL ACCESS

HEALTH

TRANSIT

CIVIC ENGAGEMENT

SAFETY

LIVE

ENVIRONMENT

DIVERSITY
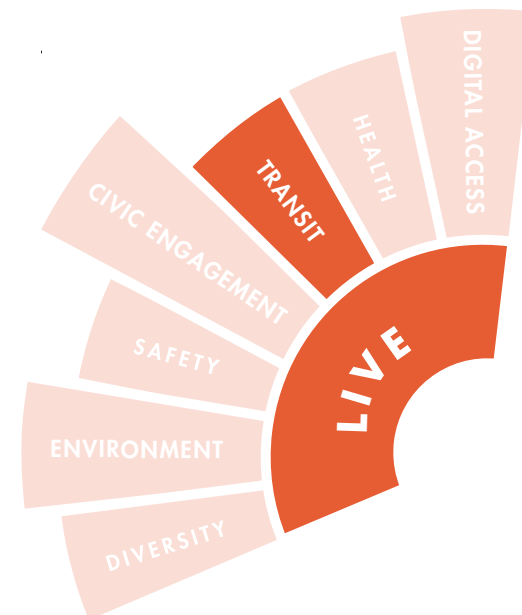
*Like Safety and Health Care Access,* the gap between Importance and Performance for Affordability is one of the largest. Being able to live, work and play affordably in their chosen city is keenly important to youth with an Importance measure of 5th and cities are simply not measuring up given the Performance level globally is near the bottom in **17th place.** In North America, **Affordability Performance ranks dead last at 21st,** doing no better than 15th in Europe.

We defined Affordability as housing, food, entertainment, transportation and communication - the foundational needs for everyone including Millennial youth. The bottom line is that if youth feel they can not afford to live in their chosen city they may, willingly or unwillingly, leave. While the interconnected nature of the varied aspects of Affordability makes this Attribute a difficult one for municipalities to address easily, it is fundamental that all municipal leaders and youth themselves place a sense of urgency to addressing this issue - be it through the issue of minimum wage, of affordable housing, of entrenched public transit or even a celebration of culture and the arts (and great restaurants).

*"Affordability is the biggest issue we face at the moment. This could be a result of inflation and also the mismatch between the earning of the community as opposed to the price of goods and services. I chose this problem to be the 1st that needs to be dealt with because, for everything else to be talked about, an individual needs to eat, have cloth on and have a roof over his head. And because it's unaffordable, those things are becoming a luxury than a necessity." – **Addis Ababa***

*"I'm going with affordability since most other issues stream from this. With high rent and public transit costs, people are stuck in a lose-lose situation where they are forced into the outer rim of Toronto which increases their reliance on public transit. Toronto's public transit being the black hole for time and money as it is, more people have to spend more time and money just to get to work/school/community events. This affects how people are able to engage with the city and how they can build towards their futures." – **Toronto***

*"The cost of living in DC is too high. Longtime residents are forced out of their neighbourhoods as young professionals move in since it's the only place they can afford. Then the price goes up and the young professionals can no longer afford it either. DC has a lot of jobs, entertainment, and public transportation, but the high cost of living makes it hard to enjoy living here." – **Washington DC***

*"Athens is amazing place for someone to spend their youth. It is vibrant and full of opportunities for art, education and life. Unfortunately, if no solution will be found for the young unemployed people, most of them will be forced to migrate and Athens will be deserted. I really want to keep living here, but if I won't manage to find a job and secure a safe income and respectful living standards, I'll have to migrate myself as well." – **Athens***

EMPLOYMENT

FINANCIAL SERVICES

EDUCATION

**WORK**

ENTREPRENEURSHIP

**AFFORDABILITY**
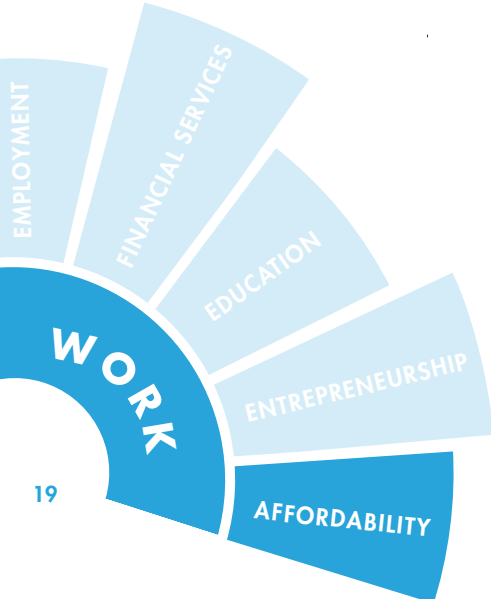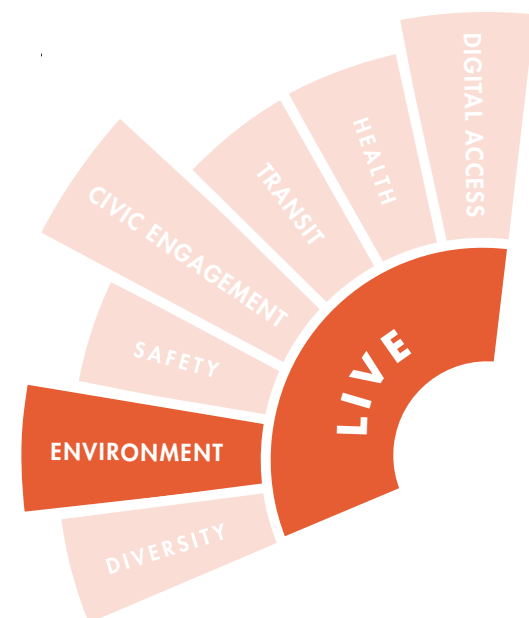
# THE ENVIRONMENT

## The Environment has an impact on nearly every aspect of urban life.

How you get around your city, if traffic is terrible and causing smog, if there is infrastructure for alternative modes of transit such as bicycles, and if public transit is accessible and practical. One of the biggest ways the Environment impacts a youthful city is through Parks and Public Space - if people aren't able to access and enjoy public spaces it limits their ability to engage with their city and other citizens. **Access is also limited** because without clean, open, and welcoming outdoor spaces, youth are limited to the indoors, which offer less opportunity for exercise and socialization.

Anecdotally, reports from our Fellows described environmental issues as more of a priority when it had immediate visible effects on their lives. In cities where smog, litter, traffic and pollution were impacting the daily lives of youth the environment becomes a higher priority. We see this in the fact that the **Environment is the second most Important Attribute in Asia,** where environmental issues are very prominent given the rapid industrialization. It holds steady at 5th or 6th in other regions, so while it is still considered very important, it is perhaps less critical or less apparent to youth in their daily life. Performance ratings are also remarkably similar across the board - it is the lowest performing Attribute globally. Every city can do more for the environment, and they can harness the dissatisfaction currently felt by millennials to do so.

*"Bangalore is a rapidly growing city that is placing severe stress on the available natural resources, especially water. If the issue of safe and sustainable water provision, sewage disposal, use of clean energy and sustainable means of transport is not resolved in the next few years, environmental degradation will pose the gravest threat to city life." – **Bangalore***

*"I believe that Montreal is trying to become green, but without having to make real compromises with the biggest polluters in the city (drivers, enterprise and manufacturing etc)." – **Montreal***

DIGITAL ACCESS
HEALTH
TRANSIT
CIVIC ENGAGEMENT
SAFETY
LIVE
ENVIRONMENT
DIVERSITY

## PERFORMANCE

**How does a city perform on the most important Urban Attributes, and how does it compare to others?**

| GLOBAL & REGIONAL PERFORMANCE | GLOBAL | AFRICA | ASIA | EUROPE | LATIN AMERICA | NORTH AMERICA |
|---|---|---|---|---|---|---|
| Environment | 5.38 | 4.36 | 5.52 | 5.61 | 5.02 | 6.36 |
| Employment | 5.59 | 4.02 | 6.54 | 5.95 | 5.18 | 6.23 |
| Good Jobs | 5.59 | 4.22 | 6.36 | 5.81 | 5.17 | 6.38 |
| Affordability | 5.73 | 4.76 | 6.24 | 6.41 | 5.18 | 6.04 |
| Entrepreneurship | 5.73 | 4.71 | 6.38 | 5.82 | 5.49 | 6.25 |
| Safety | 5.88 | 5.17 | 6.43 | 6.3 | 4.7 | 6.76 |
| Civic Engagement | 5.95 | 5.15 | 6.17 | 6.17 | 5.76 | 6.49 |
| Health | 6.09 | 4.92 | 6.69 | 6.77 | 5.13 | 6.93 |
| Transit | 6.24 | 5.02 | 6.47 | 7.01 | 5.76 | 6.94 |
| Public Space | 6.29 | 4.83 | 6.09 | 6.77 | 6.44 | 7.32 |
| Fashion | 6.32 | 5.47 | 7.18 | 6.82 | 5.45 | 6.68 |
| Film | 6.35 | 5.02 | 6.79 | 7.33 | 5.8 | 6.81 |
| Creative Arts | 6.37 | 5.56 | 6.32 | 7.06 | 5.94 | 6.96 |
| Sports | 6.62 | 5.75 | 6.59 | 7.34 | 6.39 | 7.03 |
| Digital Access | 6.67 | 5.4 | 7.25 | 7.59 | 5.88 | 7.21 |
| Diversity | 6.67 | 5.73 | 6.98 | 6.92 | 6.19 | 7.5 |
| Music | 6.69 | 6.28 | 6.76 | 7.29 | 6.08 | 7.03 |
| Financial Access | 6.84 | 5.77 | 7.43 | 7.39 | 6.21 | 7.42 |
| Travel | 6.88 | 5.83 | 7.53 | 7.86 | 6.08 | 7.07 |
| Education | 6.91 | 6.02 | 7.16 | 8.03 | 6.07 | 7.27 |
| Food & Nightlife | 7.04 | 6.46 | 7.46 | 7.97 | 6.37 | 6.95 |

| LEGEND | Highest in Performance | Second Highest in Performance | Third Highest in Performane | Lowest in Performance |
|---|---|---|---|---|

How does your city perform on a scale from 1-10?

## PERFORMANCE

### How does a city perform on the most important Urban Attributes, and how does it compare to others?

The Millennial Survey looks at Attributes in three categories - Live, Work and Play. Following the questions about Importance Survey respondents were asked to rate the same Urban Attributes on Performance, similarly on a 10 point scale. **The top 5 issues for youth** in Importance are all within the Live and Work spheres and most are not seen by youth as Performing well at all. In fact, many of Attributes that were rated of highest Importance dropped to the bottom of the list when it came to Performance. Particularly regarding Safety, economic factors, such as Affordability, Employment, Entrepreneurship, Access to Good Jobs, and Environment in last place.

Education **(2nd)** and Access to Financial Services **(4th)** were the only Work Attributes that made it to the top 5 in Performance. Digital Access **(6th)** and Diversity **(7th)** which are Live Attributes were also seen as high performers to Urban Millennials.

Overall, the Play Attributes are the highest performing with Food and Nightlife, Travel, Music, Sports, Creative Arts and Film making it into the top 10. In fact, almost all of the Play categories are in the top half of the Performance scale globally. While **20th** in Importance, Food and Nightlife ranks 1st in Performance globally; Music ranks 17th in Importance and 5th in Performance. This is significant not just for the cultural and arts sectors but for the economic sector - bringing in jobs, tourism, and global recognition. Millennials recognize this importance - when asked what were the benefits of living in a more youthful city **45.8%** of youth said more events coming to your city and **27.9%** said more tourists which are both key to a city's growth and prosperity not to mention it's vibrancy.

One other interesting result concerns Public Space, which was the highest ranked Play Attribute in Importance **(9th)** and the lowest rated in Performance **(12th)**. The difference in Performance between Latin and North America, which each rate its Performance high, and Africa and Asia, which each rate its Performance low, is striking. Perhaps it's a combination of a lack of defined culture or awareness of Public Space and high population density in Africa and Asia that results in this variance. Or perhaps it is the high reported Environmental concerns. We also think perceptions of Safety might also play into this difference. Whatever the reason, a case can be made for a deeper examination of the perceptions and realities regarding Public Space, globally.

# THE MOST URGENT ISSUES

## What do Millennials think is the biggest and most urgent issue that needs to be addressed in their city, right now?

When asked what they believe **the #1 issue** facing young people in their cities right now, the results mirror those from the Importance ranking, only in a different order of priority. The order was: Affordability, Employment, Safety, Environment and Education.

Environment moves up to **4th** in the urgency ranking from **6th** in Importance. This could be due to its last place ranking in Performance in the global survey. This is a loud reminder to cities that having a last place Performance ranking is unacceptable to Millennials, and that ensuring the Environment is

a priority in policies and programs is important moving forward. Affordability and Employment dominate the top spots across all the regions, exemplifying the current global economic climate and its impact on Millennials.

| TOP ISSUE | GLOBAL | AFRICA | ASIA | EUROPE | LATIN AMERICA | NORTH AMERICA |
|---|---|---|---|---|---|---|
| Affordability | 1 | 2 | 2 | 1 | 2 | 1 |
| Employment | 2 | 1 | 3 | 2 | 6 | 2 |
| Safety | 3 | 7 | 4 | 5 | 1 | 3 |
| Environment | 4 | 6 | 1 | 3 | 5 | 5 |
| Education | 5 | 3 | 6 | 9 | 3 | 6 |
| Transit | 6 | 8 | 5 | 4 | 4 | 4 |
| Health | 7 | 5 | 10 | 10 | 7 | 9 |
| Civic Engagement | 8 | 9 | 7 | 6 | 8 | 7 |
| Entrepreneurship | 9 | 4 | 11 | 7 | 10 | 11 |
| Public Space | 10 | 15 | 8 | 8 | 9 | 15 |
| Diversity | 11 | 10 | 12 | 11 | 14 | 8 |
| Creative Arts | 12 | 13 | 13 | 14 | 13 | 10 |
| Digital Access | 13 | 12 | 14 | 12 | 11 | 18 |
| Travel | 14 | 16 | 9 | 17 | 18 | 16 |
| Financial Services | 15 | 11 | 15 | 16 | 12 | 17 |
| Sports | 16 | 18 | 17 | 13 | 15 | 19 |
| Food & Nightlife | 17 | 17 | 16 | 20 | 16 | 12 |
| Fashion | 18 | 19 | 19 | 15 | 19 | 14 |
| Film | 19 | 14 | 18 | 18 | 20 | 20 |
| Music | 20 | 20 | 20 | 19 | 17 | 13 |

What is the biggest issue facing your city right now that needs to be resolved in the next few years?

# REGIONAL SNAPSHOT

## HIGHEST PRIORITY BY REGION:

**AFRICA – Employment**

**ASIA – Environment**

**EUROPE – Affordability**

**NORTH AMERICA – Affordability**

**LATIN AMERICA – Safety**

## NORTH AMERICA

Low performance rating in Affordability, Employment (including Good Jobs, High Employment and Entrepreneurship) and the Environment.

Perceived as highest performing in Diversity; also the highest ranked amongst the regions. High performing in terms of education, but low performing on jobs.

Despite the fact that employment is given a low Performance Rating does not mean North American youth think less of their employability.

*To find youth who believe they are the hardest workers globally look no further than Toronto!*

70% of Montreal youth believe they have the skills to get the job, the highest globally.

## EUROPE

Low performance rating in: Environment; Employment (including Good Jobs, High Employment and Entrepreneurship) and Civic Participation; Education is the highest performing in the eyes of European youth; Unlike many regions only 2/5 highest performing urban attributes are in the play categories.

London places the highest importance on Affordability in Europe, and second highest globally (after Medellin) 9.87/10

*Athens reports the best performance in Food and Nightlife in Europe, at 9.06/10*

## ASIA

Lowest performing in Environmental Sustainability (also the 2nd highest priority to regional youth); Room to improve in art and design culture; High performance ranking on Financial Services and Digital Access.

Environment is ranked #2 in Importance for Asia - higher than all other regions.

*78.9% of youth in Mumbai consider themselves environmentally conscious - the highest in Asia*

## AFRICA

Room for improvement in the "work" categories. 4/5 of the lowest performing urban attributes are in the work category; particularly around employment.

**FUN FACT:** *Youth in Addis Ababa are the happiest in our global sample - 88.7% are happy or very happy!*

Civic Participation: Nairobi is the city where youth want to be most involved: 91.2% would participate in meetings about their city's future.

## LATIN AMERICA

Low performance rating in safety, environment, health, employment and affordability; Access to Parks and Public Space the highest performing in Latin American region, yet Safety rated as the lowest performing urban attribute. And globally speaking was regionally ranked as less important than other regions; Diversity listed as a high performer in Latin America.

*Latin American are most likely to believe they are engaged citizens, voting and getting involved when they can.*

1% of youth in Brasilia believe their government listens to them a lot in planning the future.

# SO WHO ARE THESE MILLENNIALS WE SURVEYED?

## Profile of Urban Millennials: better understanding, for better connection

We asked approximately **15,000 youth from 34 cities** to self-identify with a list of characteristics - what sorts of things they believe about themselves, their technology use, transit and livings habits, as well as their levels of engagement with their cities.

### Here are some the specifics of what they said:

| They are happy | GLOBAL (%) | AFRICA (%) | ASIA (%) | EUROPE (%) | LATIN AMERICA (%) | NORTH AMERICA (%) |
|---|---|---|---|---|---|---|
| I am happy/very happy | 74.2 | 71.4 | 71.7 | 69.8 | 78.9 | 79.0 |

How happy are you in general?

| They are healthy and active | GLOBAL (%) | AFRICA (%) | ASIA (%) | EUROPE (%) | LATIN AMERICA (%) | NORTH AMERICA (%) |
|---|---|---|---|---|---|---|
| I'm a physically active person | 42.4 | 32.6 | 46.2 | 48.4 | 39.1 | 45.4 |
| I am healthy/very healthy | 65.5 | 67.2 | 56.9 | 63.7 | 67.9 | 71.7 |

Which of the following do you agree with?

**42% of global Millennials** self-identify as physically active, led by European youth and followed by Asian, North American, Latin American and African. While it is positive to see so many youth self-identifying as physically active, however, there are **58%** that need to get motivated. Focusing on preventative health care through physically active citizens can help curb the growing rate of obesity and diabetes. Providing safe spaces where young people can interact and play also factor into health. The Importance of Sports and Fitness culture was given a ranking of **7.85/10.** In addition Accessible Parks and Public Space is given an Importance rating of **8.46**.

| They are environmentally conscious | GLOBAL (%) | AFRICA (%) | ASIA (%) | EUROPE (%) | LATIN AMERICA (%) | NORTH AMERICA (%) |
|---|---|---|---|---|---|---|
| I'm environmentally conscious | 52.4 | 32.5 | 61.8 | 53.5 | 60.1 | 53.4 |

Which of the following do you agree with?

More than half of global Millennials think of themselves as environmentally conscious. The highest numbers come from Asian and Latin American youth at **over 6% followed by 54%** of North Americans and Europeans. This characteristic was least self-identified by African youth, at **33 per cent**.

# SO WHO ARE THESE MILLENNIALS WE SURVEYED?

## Profile of Urban Millennials: better understanding, for better connection

### They live with their families

| | GLOBAL (%) | AFRICA (%) | ASIA (%) | EUROPE (%) | LATIN AMERICA (%) | NORTH AMERICA (%) |
|---|---|---|---|---|---|---|
| I live with my parents/family | 59.8 | 62.6 | 65.4 | 52.5 | 72.8 | 45.6 |
| I rent a house/apartment/room with others | 19.4 | 13.9 | 16.1 | 21.2 | 15.5 | 30.2 |
| I rent a house/apartment/room by myself | 11.5 | 17.5 | 11.4 | 13.1 | 6.2 | 9.6 |
| I own a house/apartment | 9.3 | 6.0 | 7.1 | 13.1 | 5.5 | 14.6 |

*Which of the following best describes your living situation?*

Globally, **nearly 60%** of the total group lives at home. For many, this means they'll be searching for a place to settle into for post secondary school or for life after school. Cities are attractive places for mobile youth if they satisfy what's most important: if they're safe, if they offer a healthy urban experience, if there are education options, if transit allows them to travel around the city efficiently and if they're affordable. Getting these factors right equals youthful, which in turn equals appealing.

### They are very connected digitally; not so much with more traditional mediums

| | GLOBAL (%) | AFRICA (%) | ASIA (%) | EUROPE (%) | LATIN AMERICA (%) | NORTH AMERICA (%) |
|---|---|---|---|---|---|---|
| Mobile/cell phone | 90.3 | 82.4 | 94.1 | 96.5 | 91.2 | 86.7 |
| A computer | 82.6 | 64.2 | 85.7 | 89.2 | 85.6 | 87.9 |
| Social media sites | 71.4 | 48.6 | 74.0 | 78.3 | 82.3 | 72.8 |
| Free mobile apps | 61.4 | 38.0 | 64.2 | 69.1 | 67.2 | 67.9 |
| TV | 51.0 | 54.3 | 52.3 | 41.4 | 52.8 | 54.5 |
| Online news sites | 46.9 | 23.6 | 47.3 | 59.8 | 54.3 | 48.6 |
| Radio | 34.5 | 43.8 | 23.6 | 35.6 | 34.5 | 35.7 |
| Blogs and online forums | 28.7 | 19.1 | 32.3 | 29.4 | 30.9 | 31.7 |
| Free printed newspapers | 15.5 | 9.7 | 17.0 | 15.9 | 15.8 | 18.9 |
| Paid printed newspapers | 14.9 | 11.9 | 23.3 | 13.8 | 13.0 | 12.5 |

*Which of the following do you use regularly - more than once a week?*

Regionally, there are real differences in media consumption and usage among global youth. African youth use computers the least, but watch television more than all other groups, except North Americans. In fact, African youth are the least likely to use any of the more contemporary forms of media - including social media, blogs and mobile apps. In tandem with TV, they're reliant on radio, which they use more than any other group. Youth in Asia report the highest use of paid printed newspapers - **almost 10% higher** than each of the other regions. European youth, meanwhile, describe the highest use of online news sites, computers, cell phones and mobile apps. Can we describe the Europeans, then, as the most techno-literate youth population? Or is it more about young people in this region having the greatest access to these technologies?

# SO WHO ARE THESE MILLENNIALS WE SURVEYED?

Profile of Urban Millennials: better understanding, for better connection

| They use skateboards (or at least a few of them do) | GLOBAL (%) | AFRICA (%) | ASIA (%) | EUROPE (%) | LATIN AMERICA (%) | NORTH AMERICA (%) |
|---|---|---|---|---|---|---|
| Public transit | 76.0 | 72.8 | 75.4 | 90.2 | 75.4 | 65.7 |
| Walking | 54.9 | 37.7 | 49.5 | 71.9 | 53.6 | 61.3 |
| Car | 43.7 | 30.3 | 43.7 | 34.2 | 48.8 | 61.3 |
| Taxi | 25.2 | 24.6 | 41.2 | 16.0 | 29.8 | 14.1 |
| Bike | 21.4 | 12.5 | 15.6 | 30.8 | 20.8 | 27.4 |
| Skateboard | 3.1 | 2.3 | 1.3 | 3.6 | 2.7 | 5.4 |

How do you get around your city?

**76% of youth get around using Public Transit.** The highest number is amongst European youth at **90%** and the lowest in North America at **66%**. European youth are the most avid cyclists.

Reliance on the automobile by North American youth is pronounced, with this group saying they ride public transit the least and use their cars the most. The opposite is the case for young people in Europe, who take public transit the most and come second to Africa for lowest car use. Europeans also live up to their reputation as bicycle-lovers, mentioning the highest use of bikes to get around their cities. Cities' walkability also emerges as an interesting analytical lens, as our results show that **African and Asian youth walk as a form of transit only half as much as European youth do.**

# EMPLOYMENT & ENTREPRENEURSHIP

| | GLOBAL (%) | AFRICA (%) | ASIA (%) | EUROPE (%) | LATIN AMERICA (%) | NORTH AMERICA (%) |
|---|---|---|---|---|---|---|
| I'm an entrepreneurial person | 27.6 | 25.4 | 28.6 | 21.4 | 43.4 | 19.0 |
| I want to start my own business or organization at some point | 38.7 | 44.9 | 41.1 | 30.1 | 48.8 | 28.8 |

Which of the following do you agree with?

Globally more than half of youth say they're creative. **28% say they're entrepreneurial.** And **39%** want to start their own business or organization. We think these results show how youth need some facilitating factors present that will help them make the leap from having an idea and having drive, to being comfortable with the risk inherent to starting one's own business or organization.

North American youth were the least likely to say they're entrepreneurial **(19%)** and that want to start their own business or organization **(29%)**.

As we have seen in many cities, Employment is considered one of the most pressing urban issues, often in response to the number of graduates far exceeding the availability of stable jobs. Perhaps an answer to the unemployment rate might be to create opportunities through entrepreneurship. The time is right, with almost 40% of global youth wanting to start their own business or organization at some point in their lives. The highest percentage coming out of Latin American, Africa vs. the lowest out of Europe and North America. This presents an incredible opportunity to engage Millennials in generating jobs and economic prosperity in cities.

| | GLOBAL (%) | AFRICA (%) | ASIA (%) | EUROPE (%) | LATIN AMERICA (%) | NORTH AMERICA (%) |
|---|---|---|---|---|---|---|
| I feel I have the skills to get the job I want | 43 | 31.2 | 36.4 | 43 | 57.5 | 46.2 |

Which of the following do you agree with?

Latin American youth are most confident in their skills, with **58%** feeling that they have the skills to get the job that they want.

*"There are large number of youth coming out from universities and colleges but most don't get enough training on business development and not equipped with entrepreneurship skills... and also doesn't have access to the right info, and finance to help them get the necessary tools for starting a business"*

# EMPLOYMENT & ENTREPRENEURSHIP

| | GLOBAL (%) | AFRICA (%) | ASIA (%) | EUROPE (%) | LATIN AMERICA (%) | NORTH AMERICA (%) |
|---|---|---|---|---|---|---|
| **I am employed full-time** | 31.8 | 19.4 | 45.3 | 31.4 | 27.3 | 35.1 |
| **I am not seeking employment at this time** | 22.2 | 20.7 | 22.6 | 29.1 | 24.2 | 14.0 |
| **I am unemployed** | 16.3 | 29.2 | 9.3 | 11.0 | 15.3 | 17.3 |
| **I am employed part-time** | 15.6 | 12.3 | 11.4 | 13.8 | 14.0 | 26.3 |
| **I am self-employed** | 7.2 | 4.4 | 6.9 | 6.9 | 14.3 | 3.3 |
| **I do contract work** | 7.0 | 14.0 | 4.5 | 7.9 | 4.9 | 3.9 |

*Which of the following best describes your employment situation?*

# ARE THEY DRIVEN BY PURPOSE OR BY MONEY?

**We don't know yet but for whatever reason this generation may be the first who do not believe they will be better off financially than their parents**

| | GLOBAL (%) | AFRICA (%) | ASIA (%) | EUROPE (%) | LATIN AMERICA (%) | NORTH AMERICA (%) |
|---|---|---|---|---|---|---|
| **I'm financially motivated** | 30.7 | 19.8 | 37.8 | 31.8 | 28.9 | 34.9 |
| **I think I will be better off financially than my parents** | 31.3 | 24.9 | 37.3 | 27.4 | 40.4 | 26.3 |

*Which of the following do you agree with?*

**31%** of the global youth are financially motivated. When it comes to money matters, youth in Asia are the most motivated by money at **38%**. On the opposite side of the spectrum is African youth at **20%**. **31%** of youth globally believe that they will be financially better off than their parents. Latin American youth are the most optimistic. North American and African youth are the least likely to think they will be better off than their parents.

*Do these numbers represent a shifting mindset of a generation motivated by PURPOSE?*
*Or is it an indicator of the impact of the global economic crisis on Millennials?*

# YOUTHFULCITIES INDEX

## Once we understand urban youth and what's important to them, we can learn from cities that perform well in our Index

Every year we release the **YouthfulCities Index**, an empirical study of cities across the same *Urban Attributes of the Live, Work and Play spectrum.* We use over 100 metric to assess the youthfulness of cities from a youth perspective. This data is a critical piece of measuring and understanding the realities of cities around world.

Below are some facts from this **2016** Survey compared with examples of empirical proof from the **2015** Index.
**Note:** The 2015 Index had 55 cities,not all of which were included in the 2016 Survey reported here.

- **TRANSIT:** Cyclists take note! From the Survey we know that Transit is the 4th most important Urban Attribute, and cycling is an important method of getting around cities: 1 in 5 youth Surveyed use bikes as a primary mode of transit. The Index shows that Shanghai has the largest Bicycle sharing network, with over 28,000 bikes available at 600+ stations.

- **HEALTH:** Given their tendency to move around, youth are often without family doctors and are reliant on clinics for day-to-day health care yet Access to Health Care is the 2nd most Important priority. The Index shows London as a leader in the area of Access to Health Care, with over 2100 walk-in clinics!

- **EDUCATION:** With Access to Post-Secondary Education being 3rd in Importance in the survey, the Index shows just how high a value Warsaw places on Education. The city has 170 Post-Secondary institutions - or one for every 10,000 people! Per capita, this is twice as many as 2nd place Boston.

- **AFFORDABILITY:** The survey ranks Affordability as 5th highest in Importance for youth - this means everything from income to expenses. That's why minimum wage is just as important as the cost of transit and rent. Sydney places highest in terms of inputs, guaranteeing a minimum of $16.28 US, almost $4 higher than 2nd place Paris.

- **SPORTS:** Our Survey data says that globally 43% of Millennials describe themselves as "physically active". Our Index results tell us that Moscow is one of the most accommodating cities for this active group, maintaining 15,270 municipal sports facilities for public use.

# A YOUTHFUL CITY IS...

**Highlighting leading cities from our YouthfulCities Index can showcase where great youthful ideas come from**

| URBAN ATTRIBUTES | WINNING CITY |
| --- | --- |
| AFFORDABILITY | TEHRAN |
| SAFETY | LONDON |
| DIGITAL ACCESS | MADRID |
| TRANSIT | AMSTERDAM |
| CIVIC ENGAGEMENT | MEXICO CITY |
| DIVERSITY | TORONTO |
| ENVIRONMENT | SAN FRANCISCO |
| HEALTH | LONDON |
| PUBLIC SPACE | MOSCOW |
| EDUCATION | WARSAW |
| EMPLOYMENT | SAN FRANCISCO |
| ENTREPRENEURSHIP | SAN FRANCISCO |
| FINANCIAL ACCESS | MOSCOW |
| MUSIC | NEW YORK CITY |
| FILM | NEW YORK CITY |
| FASHION | NEW YORK CITY |
| SPORTS | MOSCOW |
| ARTS AND DESIGN | PARIS |
| FOOD AND NIGHTLIFE | TOKYO |
| TRAVEL | LONDON |

# AND THE AWARDS GO TO...

**There are so many ways to examine, look at, delve into with the data from a Survey of 15,000 people.**

**We wanted to celebrate cities for their great achievements through the eyes of their Millennials.**

**We're pleased to present the following awards:**

**QUESTION ASKED:**
Do you think your local/municipal government listens to youth as it plans the future of your city?

MY GOVERNMENT LISTENS AWARD
**MONTREAL**
2016 1st

**QUESTION ASKED:**
The city with the most youth who self-identify with the statement: "I think I will be better off financially than my parents."

WEALTHY NEXT GEN AWARD
**MOSCOW**
2016 1st

SKATEBOARDING AWARD
**ADDIS ABABA**
2016 1st

**QUESTION ASKED:**
How do you get around your city?

CYCLISTS AWARD
**BERLIN**
2016 1st

**QUESTION ASKED:**
How do you get around your city?

**QUESTION ASKED:**
How youthful is your Mayor on a scale of 1-10 where 10 is very youthful?

MOST YOUTHFUL MAYOR
**LONDON**
2016 1st

**QUESTION ASKED:**
How do you get around your city?

PUBLIC TRANSIT AWARD
**WARSAW**
2016 1st

ENTREPRENEURIAL AWARD
**MUMBAI**
2016 1st

**QUESTION ASKED:**
The city with the most youth who self-identify with the statement "I am an entrepreneurial person."

START-UP SPIRIT AWARD
**KINSHASA**
2016 1st

**QUESTION ASKED:**
The city with the most youth who self-identify with the statement "I want to start my own business or organization at some point."

# YOUTHFULCITIES RESEARCH FELLOWS AND METHODOLOGY

## SAMPLE DETAILS

- **Total Global Respondents across 55 cities:** 18,800

- **Total respondents in final 34 cities with minimum of 150 responses/city:** 15,931

- **Final weighted sample:** 15,030

- **Collection timing:** August 2015-January 2016

- **Collection Method:** Through an online/mobile and paper-based intercept surveying.

### About Survey design and collection?

YouthfulCities' HQ team has more than 30 years of research design experience and two previous Urban Millennials Surveys completed. Using this experience the team developed a [51 question] questionnaire. It was tested with youth around the world to ensure clarity.

Next we recruited Research Fellows in almost all of the cities represented in the report. They were trained and then tasked with promoting the Survey and collecting responses from a representative sample of local youth.

If the primary local language was not English, the Survey was translated into the local language. For representation, we targeted for age, gender, neighbourhood and student/non-student status (see more on this below under weighting). In a few cities (New York, Chicago, Los Angeles, Washington DC, Shanghai and Hong Kong) we did not have enough of a local sample through our fellows, so we supplemented the sample using a research panel company.

What did the Survey ask? There are three main sections in the Survey:

**1. About You:** This section captured demographic details and psychographic questions

**2. About Your City:** This section focused on urban attributes, the Survey asked three questions

    A. How important is this attribute to you, on a scale of 1-10?

    B. How well do you think your city is performing on this attribute, on a scale of 1-10?

    C. What is the biggest issue facing your city right now that needs to be resolved in the next few years?

**3. About Youthfulness:** This section asked a few questions based around the concept of a youthful urban attitude. A number of which were focused on municipal governments and leadership.

### Weighting: Cities and Regions

To be included as part of our sample, each city was required to have a minimum of 150 responses, and each region needed to have at least five cities. This is why the Middle East is not included in our global sample; we were only able to achieve our minimum sample in two cities: Beirut and Jeddah. In order to determine regional and global averages, and to minimize the impact that cities with varied sample sizes exerted, each city and each region was weighted equally.

Although we worked with our Research Fellows on a weekly basis to maximize the representativeness of each city's sample, some cities ended up having age, gender or student/non-student disparity. In order to correct this, where necessary, samples were weighted to identical proportions: 50:50 for each of sex, age (15 – 22 vs. 23 – 34), and being in school or not. Weights were capped at a maximum of 2.0 – with < 4% of each sample being affected by this. After weighting, the total number of responses is 15,030.
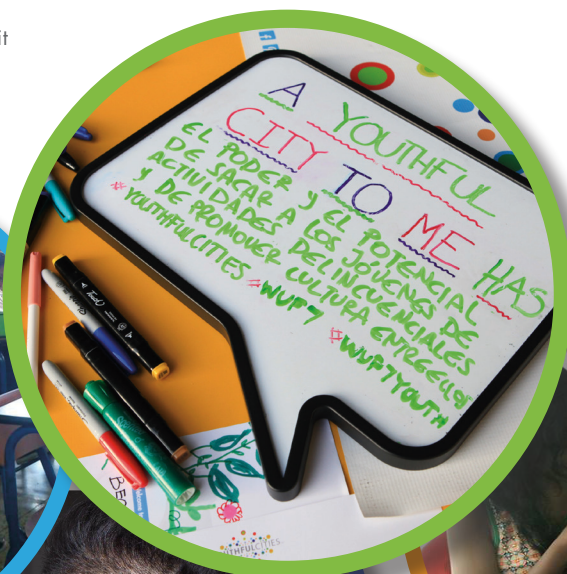
### Statistical Confidence Level

Based on the variability among those cities, we compute that a 95% confidence interval around the overall average would be about +/- 4.6% for top 3 box in terms of the felt importance of affordability (i.e., the proportion of people who felt affordability was 'important'), and +/- 2.2% for the average importance of affordability, as summary statistics of these data, and inferentially for comparable cities around the world.

# THANK YOU TO ALL OF OUR RESEARCH FELLOWS

| | | | |
|---|---|---|---|
| Abuja | Babatunde Adegoke | Kinshasa | André Moliro |
| Accra | Rafia Lawal | Lagos | Joseph Olaniyan |
| Addis Ababa | Ayatam Simeneh | London | Ambreen Rahman |
| Athens | Alexia Spyridonidou | Manila | Louie Dela Cruz |
| Bangalore | Paras Tyagi | Medellin | Santiago Martinez |
| Bangkok | Sukpavee Vesboonchoo | Mexico City | Carolina Maldonado |
| Beirut | Bechara Chemaly | Montreal | Elizabeth Thongphanith |
| Belgrade | Maja Vojinovic | Moscow | Ivan Timofeev |
| Berlin | Verena Röll | Mumbai | Rakesh Kumar |
| Brasilia | Anna Machado | Mumbai | Ravindra Chowdhary |
| Cairo | Hossam Soltan | Nairobi | Georgina Obonyo |
| Caracas | Victor Becerra | Prague | Alexandra Licha |
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| Dhaka | Nafisul Abrar | Sao Paulo | Guilherme Arbache |
| Dubai | Ahmad Farooq | Singapore | Roshni Kapur |
| Dubai | Leen Romaneh | St. Petersburg | Kseniia Lakunina |
| Durban | Kehdinga George Fomunyam | Toronto | Chloe Marie Brown |
| Hong Kong | Helen So | Vancouver | Phoebe Stewart |
| Istanbul | Busra Siseki | Warsaw | Karolina Zubel |
| Jakarta | Greise Yustikarini | | |
| Jeddah | Firdous Habibullah | | |
| Johannesburg | Elnari Potgieter | | |
| Karachi | Shaheera Jalil Albasit | | |
| Khartoum | Mohamed Abubakr | | |

# MAKE YOUR CITY YOUTHFUL, NOW.

YouthfulCities has developed a unique Knowledge and Innovation Platform to engage youth in building better, connected, dynamic, open, fun, curious & inventive cities.

We are working with municipalities around the world like Toronto and Quito to engage their youth population in creating economic and social development.

**If you want to engage Millennials to...**
- Solve your city's biggest challenges
- Better understand how to allot funding to youth-related programs
- Understand youth priorities and perceptions to improve communications; engagement and service design
- Help attract and retain young talent and residents
- Develop a comprehensive youth policy that accurately reflects youth needs and desires
- Create opportunities for youth engagement and employment
- Collect baseline data for deeper research into youth and the future of your city
- Benchmark the changing attitudes of youth over time

**Part of a comprehensive YouthfulCities Knowledge Platform.**
The Millennial Survey is on part of a large knowledge platform for leading edge municipalities. Some other components available to municipalities include:
- Customizable research & deeper cross tabulation analytics
- Longitudinal data (available in future years)
- Qualitative Research
- Urban Social Listening tools
- Youth Engagement Workshops and consulting
- Special Urban Attribute Reports
- Global & Regional Comparisons
- Policy Analysis

## Quito Case Study: A Youthful Partnership
YouthfulCities and the City of Quito joined forces to generate unique urban innovations, from youth outward. Together we are working toward an output that will include a deep knowledge base of youth opinion and globally comparable data for the city and its youth. It will unleash youth-led social innovation in Quito and become an example for other cities to follow.

"Designing effective public policy and implementing high impact projects to generate development in Quito requires a better understanding of our citizen's needs and of our current reality. YouthfulCities vision and work provides valuable data analysis about our cities and have become strategic allies of the youth, organizations and municipalities to generate social innovation around the world."

*Carolina Pozo Donoso, Former Secretary General*
*Planning and Open Government, City of Quito*

**Contact us to get started:** info@youthfulcities.com

YouthfulCities helps cities understand and engage the Millennial Generation. We are building global Millennial Generation networks to help cities. We are going deep into youth-driven urban knowledge about cities. We are generating inventive urban solutions for cities. And, we are illuminating youthful stories about cities. All this leads to more connected, dynamic, open, fun, curious and inventive cities - more youthful cities.

Each year with the help of our booming Urban Decoder Network, we:

- Survey youth through the YouthfulCities Urban Millennials Survey. Gauging opinions of thousands of youth (15-34 year olds) globally.

- Rank cities through the YouthfulCities Index – now ranking 55+ cities around the globe.

- Gather young innovators and influencers at the YouthfulCities Global Summit.

- Work with leading municipalities and urban-focused businesses to investigate and inspire youthfulness in cities.

**YOUTHFULCITIES HELPS CITIES UNDERSTAND AND ENGAGE THE MILLENNIAL GENERATION. WE ARE LOOKING FOR CITIES TO WORK WITH.**

Are you a municipal strategist? A policy maker, civic leader, business leader? Do you want to mobilize Millennials to build a more youthful, prosperous city?
Contact us at: **info@youthfulcities.com**

**YOUTHFUL**CITIES