Empowering city brands: Bridging the perception and reality divide

Consumer Intelligence Series

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Why cities are important, in reality and perception

As Londoners watched their country vote to exit the European Union in July 2016, many couldn't help but wonder and worry about the potential consequences for both the city and the nation. In the immediate wake of the vote, perception of the risks to London dominated the headlines. Financial markets grew skittish, and political leaders reacted initially with a mix of concern and confusion.

Would London, despite Brexit, be able to maintain both its status as a global and European financial capital? Even PwC's *Cities of Opportunity 7* report warned that London's leadership could be challenged by European and overseas competitors who see opportunities to challenge the UK's capital's position as a financial center, as the country plans its exit from the EU.

A month after the Brexit vote, the Summer Olympic Games opened in Rio de Janeiro, another high-visibility moment spotlighting the importance of cities. But for Rio and Brazil, the Games raised a different set of questions about reputation than London's after Brexit. The Olympics offered Rio an opportunity to brand its city for the long term, proving to the world that the city represents so much more that negative perceptions of crime or pollution.

The Brexit vote and the 2016 Olympics demonstrated the challenges for cities confronting perceptions with reality, and why a city's rank in a competitive global marketplace can grab headlines. Both cases also illustrate how cities are becoming as important and influential as countries, if not more so.

As of 2008, more people worldwide lived in cities than in rural areas, and by 2050 more than two-thirds of us are expected to live in cities. Although roughly half of today's urban dwellers reside in relatively small cities of fewer than

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500,000 inhabitants, megacities—those with more than 10 million people—are home to 12 percent of the world's population. Cities of all sizes are projected to continue growing worldwide over the coming decades, with much of that growth centered in the rapidly urbanizing developing world.
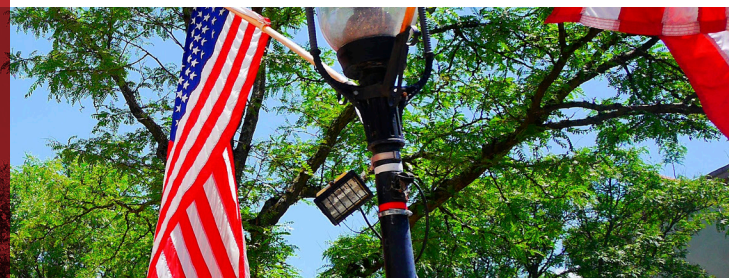
In the United States, cities account for more than 90 percent of national GDP and 85 percent of the nation's total population. In fact, cities have become so influential that many economists view the global market primarily as a network of urban economies.

This report explores the world's perception of major cities, how these perceptions might differ from reality—and why we should pay attention. Our unique access to data from two PwC studies informs our analysis. Conducted in collaboration with BAV Consulting, *Best Cities* is a study of how cities are perceived around the world. *Cities of Opportunity*, meanwhile, is a robust comprehensive benchmarking of city "reality"—hard facts about cities' tangible assets including infrastructure, education, technology readiness, and economic clout. The two studies reveal gaps between perception and reality, and the implications and benefits of aligning the two, and guide us in providing examples of how global cities have worked to change both perception and reality in the past.

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[1]Cities of Opportunity 7, 2016.

[2]https://esa.un.org/unpd/wup/Publications/Files/WUP2014-Highlights.pdf; https://esa.un.org/unpd/wup/

[3]http://www.nlc.org/Documents/Find%20City%20Solutions/City-Solutions-and-Applied-Research/NLC%20State%20of%20Cities%202016.pdf; http://usmayors.org/metroeconomies/0616/keyfindings.pdf

[4]http://documents.worldbank.org/curated/en/902411467990995484/pdf/101546-REVISED-Competitive-Cities-for-Jobs-and-Growth.pdf; https://www.thechicagocouncil.org/sites/default/files/160420-elperspectives_adamhitchcock.pdf; http://edq.sagepub.com/content/14/1/15.abstract

[5]See Cities of Opportunity 7 at pwc.com/cities

More about the studies

Our study of perceptions: Best Cities

Best Cities is a study of how people perceive cities. We surveyed a group of 5,200 people from 16 countries, consisting of an equal number of business decision makers, informed elites, and other general population adults over 18 years of age, to find out what and how they think about 30 global cities, the same group researched in PwC's *Cities of Opportunity*. We measured over 40 metrics related to politics, economics, and social issues to generate overall city rankings as well as public image rankings for specific attributes.

We asked about perceptions, such as the level of regard respondents hold for a city, and which factors they associate with each city, such as well-developed infrastructure; innovation; leadership; influence in terms of economics, politics, and culture; happiness; affordability; traffic congestion, strong public transportation; great entertainment and cultural attractions; income equality; safety; access to public education and public health; and great food.

Using our subjective measures to generate *Best Cities* survey results, we created an aggregate score for each city that compiled the relative strengths in perception based on city attributes. We used this aggregate score to rank the cities 1 through 30. *Best Cities* was conducted in December 2015.

Our study of the reality: Cities of Opportunity

While *Best Cities* is all about perceptions, *Cities of Opportunity* focuses on reality. That study examines the same 30 global cities we surveyed in *Best Cities* through objective, publically available, and consistent data. A total of 67 data variables were measured and grouped into ten categories: transportation and infrastructure; health, safety, and security; demographics and livability; sustainability and the natural environment; economic clout; intellectual capital and innovation; education; technology readiness; ease of doing business; and cost. Data associated with each of these factors was aggregated to rank the cities 1 through 30. *Cities of Opportunity* was released in September 2016 and is composed mostly of third-party research from 2014 and 2015, though some survey data and select older and newer data is included.

Understanding public
perceptions on cities

A tale of two cities: contrasts in perceptions

Years ago, tennis star Andre Agassi appeared in ads for Canon cameras. The campaign tagline was "Image Is Everything." Agassi had no major championships under his belt at the time. Some equated Canon's tagline to Agassi's "all style, no substance" career. All of that changed when Agassi finally won his first Wimbledon. By the time he retired from the sport, Agassi was an eight-time Grand Slam champion and considered one of the greats. Perception and reality had finally converged—and Agassi became a tennis icon.

For cities, image—or popular perception—matters a great deal also. Undeservedly negative perceptions hold cities back from consideration in critical areas, as key financial, political, and cultural decisions are often made based on image without using hard facts. Foreign investment decisions, for example, may be influenced strongly by those whose main take on a city is shaped by media images and the news. It's easy to see that building a narrative that elevates a city's positive attributes can be greatly beneficial.

Given the importance of a city's brand image, we created an overall image perception ranking of the 30 cities we studied in our *Best Cities* research. London, Paris and New York top the list. And Amsterdam and Sydney round out the top five of this study of 5,000+ citizens and those we call "elites"—senior business decision makers or well-educated, high-income consumers who typically stay up to date with world events.

Interestingly, there doesn't appear to be a single "route to the top," as the highest-ranked cities in our study got there via different defining qualities.

- London registers as a dynamic city, scoring well across the board in 29 of 36 image attributes. It's No. 1 on attributes including having a well-developed infrastructure, being connected to the rest of the world, and having a well-developed legal framework. It's in the top three in breadth of education for its population and for providing easy access to capital.

- Paris scores highly on 28 of 36 attributes. It's No. 1 in cultural influence, including attractions and setting cultural trends, and in the top-three-ranked cities in terms of entertainment and cuisine.

- New York's defining quality—economic power—got it ranked in the top three. It's No. 1 in being viewed overall as "a leader," for its economic influence and ability to provide easy access to capital. Its other high-scoring attributes were entertainment, setting trends, and having a well-developed physical and technological infrastructure (though, as we'll see later, this perception may not be aligned with reality). New York's perceptual weaknesses included affordable cost of living and traffic congestion.

Cities as perceived by the global Best Cities report

Overall city rankings

1.	London	11.	San Francisco	21.	Shanghai
2.	Paris	12.	Dubai	22.	Moscow
3.	New York	13.	Milan	23.	Johannesburg
4.	Amsterdam	14.	Madrid	24.	Kuala Lumpur
5.	Sydney	15.	Chicago	25.	Mexico City
6.	Berlin	16.	Hong Kong	26.	São Paulo
7.	Tokyo	17.	Singapore	27.	Mumbai
8.	Toronto	18.	Beijing	28.	Jakarta
9.	Stockholm	19.	Seoul	29.	Bogotá
10.	Los Angeles	20.	Rio	30.	Lagos

Comparing perceptions to reality

Comparing perceptions to reality

Actual
(from Cities of Opportunity)

1. London
2. Singapore
3. Toronto
4. Paris
5. Amsterdam
6. New York
7. Stockholm
8. San Francisco
9. Hong Kong
10. Sydney
11. Seoul
12. Berlin
13. Los Angeles
14. Chicago
15. Tokyo
16. Madrid
17. Dubai
18. Milan
19. Beijing
20. Kuala Lumpur
21. Shanghai
22. Moscow
23. Mexico City
24. Johannesburg
25. São Paulo
26. Bogotá
27. Rio
28. Jakarta
29. Mumbai
30. Lagos

Perceptual
(from Best Cities)

1. London
2. Paris
3. New York
4. Amsterdam
5. Sydney
6. Berlin
7. Tokyo
8. Toronto
9. Stockholm
10. Los Angeles
11. San Francisco
12. Dubai
13. Milan
14. Madrid
15. Chicago
16. Hong Kong
17. Singapore
18. Beijing
19. Seoul
20. Rio
21. Shanghai
22. Moscow
23. Johannesburg
24. Kuala Lumpur
25. Mexico City
26. São Paulo
27. Mumbai
28. Jakarta
29. Bogotá
30. Lagos

When perception and reality converge and diverge

Perceptually, London, Paris, and New York occupy the top three cities, respectively, in the *Best Cities* study—yet in *Cities of Opportunity* they are No. 1, four and six. Singapore and Toronto take the No. 2 and three spots in *Cities of Opportunity* – yet, perceptually, they land at No. 8 and 17 on the *Best Cities* ranking. For cities, perception and reality are, more often than not, not perfectly aligned.

Of the cities showing the closest link between perception and reality, London is No. 1 in both studies, and Paris and Amsterdam are in the top five in both studies. Lagos ranks the lowest and Jakarta in the bottom three on both lists, while Shanghai and Moscow are at No. 21 and 22, respectively, on both lists.

When perceptions and reality diverge

Disparities between perception and reality can present opportunities and risks. Cities like New York, Berlin, Sydney, and Rio de Janeiro all fared better in perception than in reality, meaning that their overall perceptual brand strength outpaced their real-world attributes. Perceptions of cities like Toronto, Seoul, and Kuala Lumpur all lag behind the reality captured in *Cities of Opportunity*, indicating overall brand weaknesses.

In the chart below, cities to the right of the red line have strong brands—more powerful than their "reality"—while cities to the left of the red line are not getting as much perceptual credit as their "realities" should command. The "hidden gems" are the cities with the biggest potential —underlying strengths that are not yet recognized by global consumers.

Identifying opportunity: cities' perceptual vs. reality rankings

Diving deeper into reality vs. image gaps: Seoul, Tokyo, and Singapore diverge highly

We also examined gaps between perception and reality on the individual attributes that make up cities' overall scores. The chart below shows city rankings on two of these variables—"traffic congestion" and "sustainability and environmental care."

Best Cities ranked Beijing and Shanghai along with Hong Kong in the bottom three in perceived traffic congestion despite the fact that, in reality, *Cities of Opportunity* shows cities like Los Angeles, Moscow, and Mexico City as actually having more significant problems with traffic congestion.

Similar misperceptions plague Hong Kong, Beijing, and Shanghai when it comes to the metrics of sustainability and the natural environment. Although *Best Cities* shows that they are perceived as the bottom three cities in terms of care for the environment, *Cities of Opportunity* reveals that they rank several spots higher on actual environmental measurements.

Seoul suffers from even more misperceptions about its sustainability and environmental credentials, placing just 20th in perception yet 3rd in reality. Meanwhile Stockholm, Toronto, Sydney, and Amsterdam have perception and realities that are closely aligned on this attribute.

Tokyo and Singapore are examples of cities at opposite ends of the perception vs. reality spectrum. *Best Cities* ranks Tokyo seventh overall in perception while *Cities of Opportunity* places it 15th in reality. Singapore, by contrast, ranks just 17th overall in perception but 2nd in reality.

These divergences were replicated on various attribute measures that make up the overall rankings. For example, while perceptions of Tokyo's economic influence and public transportation both ranked highly, the data placed its real performance on those variables squarely in the middle of the pack. Singapore, meanwhile, ranks No. 1 in ease of doing business, health system performance, and safety in *Cities of Opportunity* yet is considerably lower in comparable perceptual rankings in *Best Cities*.

🚗 Least traffic congestion

Actual
(from Cities of Opportunity)

1. Singapore
2. Stockholm
3. Sydney
4. Johannesburg
5. Berlin
6. Dubai
7. London
8. Madrid
9. Chicago
10. Hong Kong
11. Amsterdam
12. Toronto
13. Milan
14. Paris
15. Kuala Lumpur
16. San Francisco
17. New York
18. Shanghai
19. Tokyo
20. Rio de Janeiro
21. Seoul
22. Beijing
23. Bogotá
24. Jakarta
25. Los Angeles
26. Mumbai
27. Moscow
28. Sao Paulo
29. Lagos
30. Mexico City

Perceptual
(from Best Cities)

1. Amsterdam
2. Stockholm
3. Sydney
4. Toronto
5. Berlin
6. Dubai
7. Milan
8. Madrid
9. Moscow
10. Paris
11. Bogotá
12. Lagos
13. Kuala Lumpur
14. San Francisco
15. Johannesburg
16. Singapore
17. Jakarta
18. Seoul
19. London
20. Chicago
21. Sao Paulo
22. Rio de Janeiro
23. Los Angeles
24. Tokyo
25. Mexico City
26. Mumbai
27. New York
28. Shanghai
29. Hong Kong
30. Beijing

Sustainability & environmental care

Actual
(from Cities of Opportunity)

1. Stockholm (tie)
1. Sydney (tie)
3. Seoul (tie)
3. Toronto (tie)
5. Amsterdam
6. Berlin (tie)
6. Paris (tie)
8. San Francisco
9. Milan
10. Madrid
11. Chicago
12. Moscow
13. London
14. Los Angeles
15. Tokyo
16. New York
17. Rio de Janeiro
18. Hong Kong
19. Johannesburg
20. Singapore
21. Sao Paulo
22. Mexico City
23. Shanghai
24. Beijing
25. Bogotá
26. Kuala Lumpur
27. Lagos
28. Mumbai
29. Dubai
30. Jakarta

Perceptual
(from Best Cities)

1. Stockholm
2. Toronto
3. Amsterdam
4. Sydney
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6. Paris
7. San Francisco
8. London
9. Singapore
10. Tokyo
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12. Johannesburg
13. Milan
14. Los Angeles
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16. Dubai
17. Lagos
18. Rio de Janeiro
19. Chicago
20. Seoul
21. Sao Paulo
22. Kuala Lumpur
23. Mexico City
24. Jakarta
25. Bogotá
26. Moscow
27. Mumbai
28. Hong Kong
29. Shanghai
30. Beijing

These are the cities "winning" on key dimensions

Stockholm

- Cares about the environment
- Cares about human rights
- Educated population
- Income equality
- Transparent business practices
- Trustworthy
- Well developed public education system
- Well developed public health system

London

- Connected to the rest of the world
- Strong public transport
- Well developed infrastructure
- Well developed legal frameworks

New York City

- A leader
- Economically influential
- Provides easy access to capital

Paris

- Has an influential culture
- Many cultural attractions
- Trendy

Bogotá

- Affordable cost of living

Berlin

- Economically stable
- Skilled labor force

Dubai

- Innovative
- Modern

Los Angeles

- Access to great entertainment
- Good internet accessibility

Moscow

- Politically influential

Rio de Janeiro

- Fun
- Scenic

Sydney

- Family friendly
- Safe

Tokyo

- Good tech and comms infrastructure

Amsterdam

- Happy

Madrid

- Has great food

So what's the simplest way to sort through the detail and get to the most critical drivers in strengthening a city's brand? Statistical analysis identified the three macrodrivers of city brands:

- Having a well-developed infrastructure

- Being perceived as modern

- Having "cultural clout"

Delivering on these drivers and identifying the gaps between perception and reality can help prioritize strategy and planning for public officials and other organizations looking to promote their cities.

A well-developed infrastructure, and opportunities for Stockholm, Singapore, Shanghai, and Beijing

We found that a strong backbone of urban infrastructure is one of the strongest drivers of a city's brand in terms of livability, business, education, and tourism. Respondents in our research were asked to identify whether they associated each of the 30 cities with having a well-developed infrastructure. What, specifically, that meant to the respondent was up to him or her. By digging deeper into the data, we discovered that among the variables respondents associated with a city's well-developed infrastructure were:

- Good internet accessibility

- Good technology and communication infrastructure

- Well-developed public health system

- Well-educated population

- Strong public transportation

- Well-developed educational system

- Skilled labor force

It's not surprising that variables like strong public transportation and infrastructure (of which transport plays a major part along with energy, water, waste, and a range of social assets) are associated because they're nearly synonymous in popular perception, but it's interesting that seemingly less-related attributes, like having a skilled labor force and a well-developed educational system, were as well.

New York has a perceived strong infrastructure—it's currently ranked No. 2 on infrastructure and all the other metrics associated with it in *Best Cities*. Yet its reality differs:

in *Cities of Opportunity*, New York scores lower for internet connectivity (No. 8 for both its broadband quality score, and its internet access in schools), as a global gateway city (No. 10) and for transportation infrastructure (No. 7).

The good news is that New York is making an effort to bring perception and reality into balance. An example is its collaboration with Qualcomm and other technology industry leaders such as advertising partners to pilot a free public Wi-Fi system called LinkNYC. Another project has been the Hudson Yards—touted as an entirely new neighborhood for New York. Described by its developers as a "technological marvel that pairs style with sustainability,"[7] it is expected to be "a real-life urban laboratory for connected living."[8] Investment in the neighborhood has been accompanied by modernization and significant expansion of the subway system.[9] These types of investments can help align perception and reality to maintain the city's high infrastructure rankings.

Some cities are not getting the credit they deserve in infrastructure, and focusing on promoting their real-world achievements can be very productive. Singapore, as noted already, ranks 15th in perception overall but posts No. 1 transportation and infrastructure in *Cities of Opportunity*. Stockholm ranks 13th in perception overall but No. 3 in reality.

Beijing and Shanghai get real-world credit in *Cities of Opportunity* as the third and seventh ranked "city gateways" but land eighteenth and seventeenth, respectively, in perceptions of connectivity to the rest of the world. Highly publicized investments in a new airport for Beijing (Daxing International Airport, scheduled for completion in 2019) and a bullet train between the two cities (transporting 130 million passengers annually at speeds of 200 miles per hour) are opportunities to drive public perceptions and bring them closer to reality.

[7]http://www.hudsonyardsnewyork.com/
[8]https://www.engadget.com/2014/05/07/hudson-yards-smart-neighborhood/
[9]http://www.hudsonyardsnewyork.com/about/our-location/

Modernity, and room for Stockholm and Beijing

Modernity is another key driver in perceptions of livability—desire to do business in and desire to pursue education in a particular city. Among the attributes that our respondents associated with being a "modern" city are:

- Being seen as trendy

- Supporting innovation and entrepreneurship

- Caring about environment

- Strong quality of life

Dubai, New York, and Los Angeles top the list of the most modern cities in our perceptual study. All three also shine in perceptions of connectivity to the rest of the world, trendiness, economic influence—and fun.

Not all cities that would be expected to perform well in perceptions of modernity actually do. Stockholm ranked 17th despite its No. 3 ranking in livability and No. 11 in innovation. Beijing, which was ranked No. 1 as a location for global company headquarters in *Cities of Opportunity*, and No. 7 in top airports, ranks just 19th in its image of modernity.

Cultural clout, and a potential bang for emerging hot spots

Cultural clout emerged as an important defining characteristic of cities in our study that can set them apart from their countries. Cultural clout is defined as "having an influential culture," in terms of entertainment, cuisine, and the arts. Respondents in our study associated it with having:

- Access to great entertainment

- Great food

- Many cultural attractions

- Influential culture

Cities in the developing world demonstrate significant opportunities to leverage their cultural clout. For example, Mumbai and Rio de Janeiro, despite lower overall rankings, score well on key cultural elements like having great food.

Mexico City, despite ranking 25th on overall cultural clout, is an example of a city making great strides to position itself for more cultural influence in the future. Not only does it rank third in *Cities of Opportunity* on access to libraries, it now boasts more than 150 museums. It may take time, but continuing to focus on these elements of modern culture should prove an effective investment for the Mexico City brand.

Up and coming cities score well in elements of cultural clout

City (overall perceptual ranking in Best Cities)	Best Cities attributes for which city ranks in top half
Mumbai (27)	**Great food, affordable**
São Paulo (26)	**Fun, scenic, affordable, happy**
Mexico City (25)	**Great food, many cultural attractions, fun, affordable**
Rio de Janeiro (20)	**Great food, many cultural attractions, fun, scenic, great entertainment, affordable, family friendly, trendy, happy**

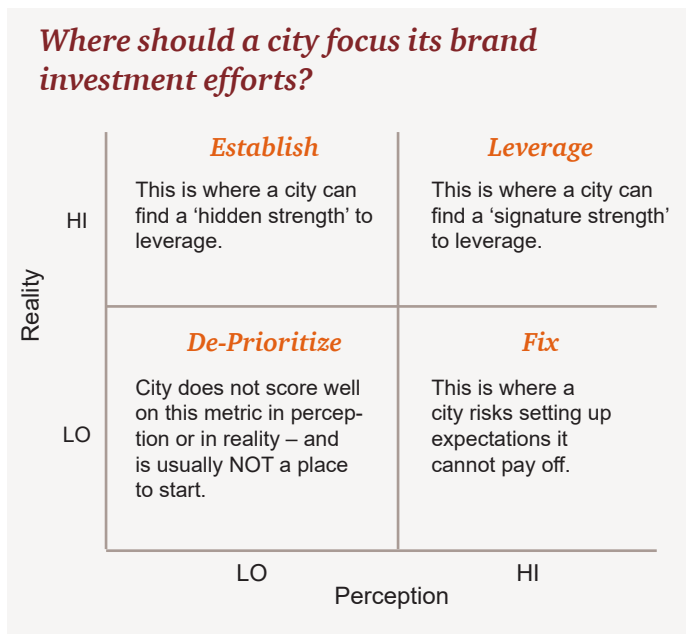# *Key lessons for urban public and private leaders*

What can cities do to strengthen their brands? Among the critical actions:
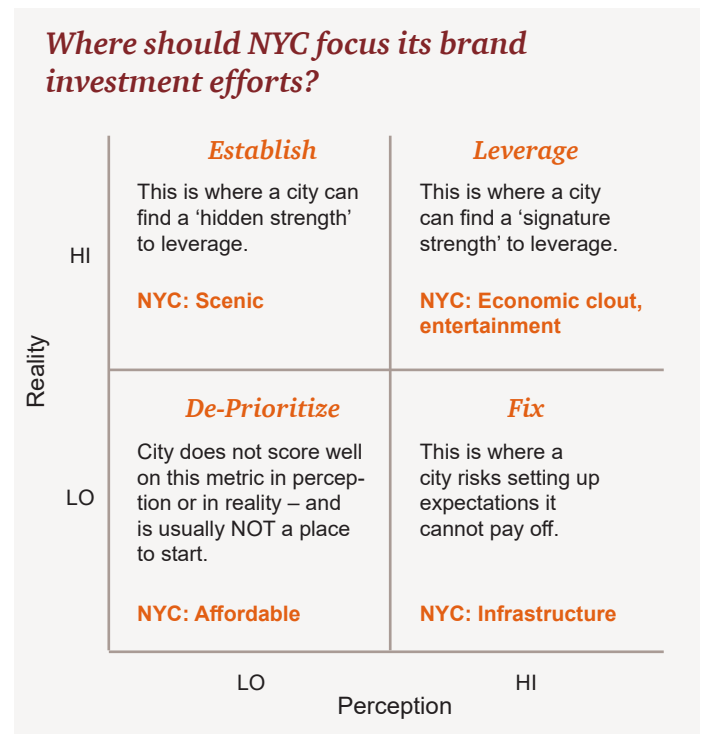
Measure first

Cities should start by conducting an audit to benchmark how they are perceived vs. their reality. Where do the two converge, and where are the gaps? Our study and methodology is one approach to doing this—but there are other sources of information including ones cities already possess. During an audit, there may be a tendency to listen to fans and boosters of your own city, and thus fall vulnerable to believing your own PR and image-making. Be sure to get objective image information from those who don't love or know much about your city—as well as those who do. A cross-section of perceptions is key to accurate judgment.

Pick your battles

For most cities, there is probably more than one job that needs to be done in order to become a stronger brand. Assessing your resources and prioritizing fixes is crucial. We created an investment matrix below that plots a city's perception vs. reality to help understand what to leverage, what needs to be established, what to fix, and what to deprioritize:

Where should a city focus its brand investment efforts?

	Establish	**Leverage**
HI	This is where a city can find a 'hidden strength' to leverage.	This is where a city can find a 'signature strength' to leverage.
LO	**De-Prioritize** City does not score well on this metric in perception or in reality – and is usually NOT a place to start.	**Fix** This is where a city risks setting up expectations it cannot pay off.

Reality (vertical axis) / Perception: LO — HI (horizontal axis)

The chart below for New York City shows the signature strengths it should leverage as a brand, including economic and cultural clout. Wall Street and Broadway are central to "brand" New York City. Chief among the city's areas of vulnerability and need of attention is infrastructure, as mentioned earlier, while conveying the city's scenic beauty is an opportunity. Affordability is probably an area the city should deprioritize. Not only is New York perceived as expensive, at No. 25 on the "cost" metric, it is one of the most expensive cities in reality, too; the city's affordability would be difficult to impact.

Where should NYC focus its brand investment efforts?

	Establish	**Leverage**
HI	This is where a city can find a 'hidden strength' to leverage. **NYC: Scenic**	This is where a city can find a 'signature strength' to leverage. **NYC: Economic clout, entertainment**
LO	**De-Prioritize** City does not score well on this metric in perception or in reality – and is usually NOT a place to start. **NYC: Affordable**	**Fix** This is where a city risks setting up expectations it cannot pay off. **NYC: Infrastructure**

Reality (vertical axis) / Perception: LO — HI (horizontal axis)

Always stay true to your city brand's core equity

Each city brand has areas in which it is both perceived to be strong, and where it is strong in reality. These are the "signature strengths" in the investment matrix above. For New York, it's economic and cultural clout, while for Paris it is trendiness, great entertainment, and cultural attractions. These are attributes that are the core DNA of those cities' brand equity and should be a "North Star" for everything they do in branding. As a powerful case in point, several years ago the city of Las Vegas began a campaign to establish itself as a wholesome family destination. Not surprisingly, the program was not successful. When the city adopted its more authentic "What Happens Here Stays Here" mantra, the Las Vegas brand got renewed vitality.

Summary

With cities playing a more important geopolitical and cultural role in the world, it is increasingly important to create opportunities big and small to take advantage of their growing influence. Just as food, entertainment, clothing, and furniture brands compete in a battle to win hearts and minds through both product quality and perception allure—to ultimately drive sales and loyalty—cities are in a "battle" to attract talent, investment, and tourists, as well as the willingness of residents to invest their lives in urban improvement.

Using data to understand each city's strengths and weaknesses can help key stakeholders focus their efforts on the most important and effective strategies to build a city's utmost competitiveness.

In good times and bad, perception plays a key role in all decision making. For a city, focusing on brand can add the strength to remain competitive in times of economic downturn and to leap ahead when the opportunity allows. When it comes to urban thinking—whether it's public planners strategizing for the common good or private businesses looking for cities with the greatest opportunity—the ability to juxtapose and find the gaps between the perceptions and realities of a city's brand will continue to be a critical tool.

Appendix

Best Cities city attributes examined

- Corrupt
- Scenic
- Bureaucratic
- Affordable cost of living
- A leader
- Cares about the environment
- Income equality
- Safe
- Politically influential
- Innovative
- Many cultural attractions
- Innovation and entrepreneurship
- Cultural clout
- Power and influence
- Has an influential culture
- Family friendly
- Trustworthy
- Has great food
- Trendy
- Provides easy access to capital
- Transparent business practices

- Economically influential
- Fun
- Happy
- Has an influential culture
- Quality of life
- Business ready
- Values and heritage
- Well-developed public health system
- Cares about human rights
- Educated population
- Economically stable
- Congested with traffic
- Well-developed public education system
- Strong public transportation
- Skilled labor force
- Access to great entertainment
- Connected to the rest of the world
- Good technological and communications infrastructure
- Global citizenship
- Adventure and beauty

Cities of Opportunity attributes examined

Intellectual capital and innovation
- Math/science skills attainment*
- Percent of population with higher education
- World university rankings
- Innovation Cities Index
- Intellectual property protection
- Entrepreneurial environment

City gateway
- Hotel rooms
- International tourists
- International association meetings
- Incoming/ outgoing passenger flows
- Airport to CBD access
- World Top 100 airports
- Airport connectivity

Health, safety, and security
- Road fatalities*
- Health system performance*
- End-of-life care*
- Crime
- Political environment
- Security and disease risk

Sustainability and the natural environment
- Natural disaster exposure
- Natural disaster
- Thermal comfort
- Recycled waste
- Air pollution
- Public park space
- Water-related business risk

Ease of doing business
- Resolving insolvency
- Ease of entry: Number of countries with visa waiver
- Number of foreign embassies and consulates
- Level of minority shareholder protection
- Operational risk climate
- Workforce management risk

Technology readiness
- Internet access in schools
- Broadband quality score
- Mobile broadband speed
- ICT usage
- Software development and multi-media design
- Digital security

Transportation and infrastructure
- Mass transit coverage
- Affordability of public transport
- Licensed taxis
- Major construction activity
- Housing
- Traffic congestion
- Ease of commute

Demographics and livability
- Entertainment and attractions
- Quality of living
- Working age population
- City brand
- Relocation attractiveness
- Senior wellbeing
- Youthful Cities Index

Economic clout
- Employment growth
- Financial and business services employment
- Attracting FDI
- Productivity
- Rate of real GDP growth

Cost
- Personal tax
- Cost of business occupancy
- Cost of living
- Purchasing power
- Affordability of rent

Relative comparisons between subjective and objective indicators such as those listed below.

	Best Cities survey elements	Cities of Opportunity survey elements
	Innovation/Innovation and entrepreneurship	Innovation cities index/Entrepreneurial environment
	Many cultural attractions/Access to great entertainment	Entertainment & attractions
	Cares about the environment	Sustainability and the natural environment
	Educated population	Percent of population with higher education
	Affordable cost of living	Cost/Cost of living
	Business ready	Ease of doing business
	Safe	Health, safety, and security/Crime
	Well-developed public health systems	Health, safety, and security/Health system performance
	Economically influential	Economically clout
	Congested with traffic	Traffic congestion
	Strong public transportation	Transportation and infrastructure
	Connected to the rest of the world	City gateway
	Good technological and communications infrastructure	Technology readiness
	Bureaucratic, corrupt, politically stable	Political environment

For more information on this research, the PwC Consumer Intelligence Series, or how changing consumer preferences are shaping your industry, please contact one of our specialists:

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