



THE URBAN ATTITUDES SURVEY

2015 EDITION

WHAT MATTERS TO URBAN YOUTH?

WE ASKED.

THEY ANSWERED.



- SONJA MIOKOVIC,
GLOBAL DIRECTOR

GREETINGS!

Welcome to our 2015 Urban Attitudes Survey.

We posed one simple question in 2013 when we started YouthfulCities: how do cities rank from a youth perspective? It led to more questions. What do we measure when building the ranking to make it useful and comparable across cities and regions? Are certain attributes of cities more important to youth than others? How do we collect the data in a credible way?

The Urban Attitudes Survey is one of the tools we developed to answer those questions. And now, it's one component of what makes our YouthfulCities engine move (see page 16 for more details).

In the following pages of this summary you'll find the key highlights from our global survey of almost 9000 youth from all five regions of the world. We asked what city attributes matter most to youth in their interactions with their cities. And we also asked how they think their cities are performing on each of these attributes.

We've analyzed the results, and this summary is a quick glimpse at some of the key highlights that begin to answer the question "What do youth really want from their cities?" On page 5, you'll find the quantitative ratings youth gave to each of the city attributes, as well as the perceived city performance ratings for each attribute. This summary is followed by our analysis of the results – what stood out? How do these results align with global trends? Where are the biggest gaps that cities should begin to address?

The results from this survey will also inform our annual YouthfulCities Index – a ranking of the world's largest cities from a youth perspective. Watch for this year's Index, launching on April 30, 2015!

Enjoy!

Sonja Miokovic
Co-Founder & Global Director

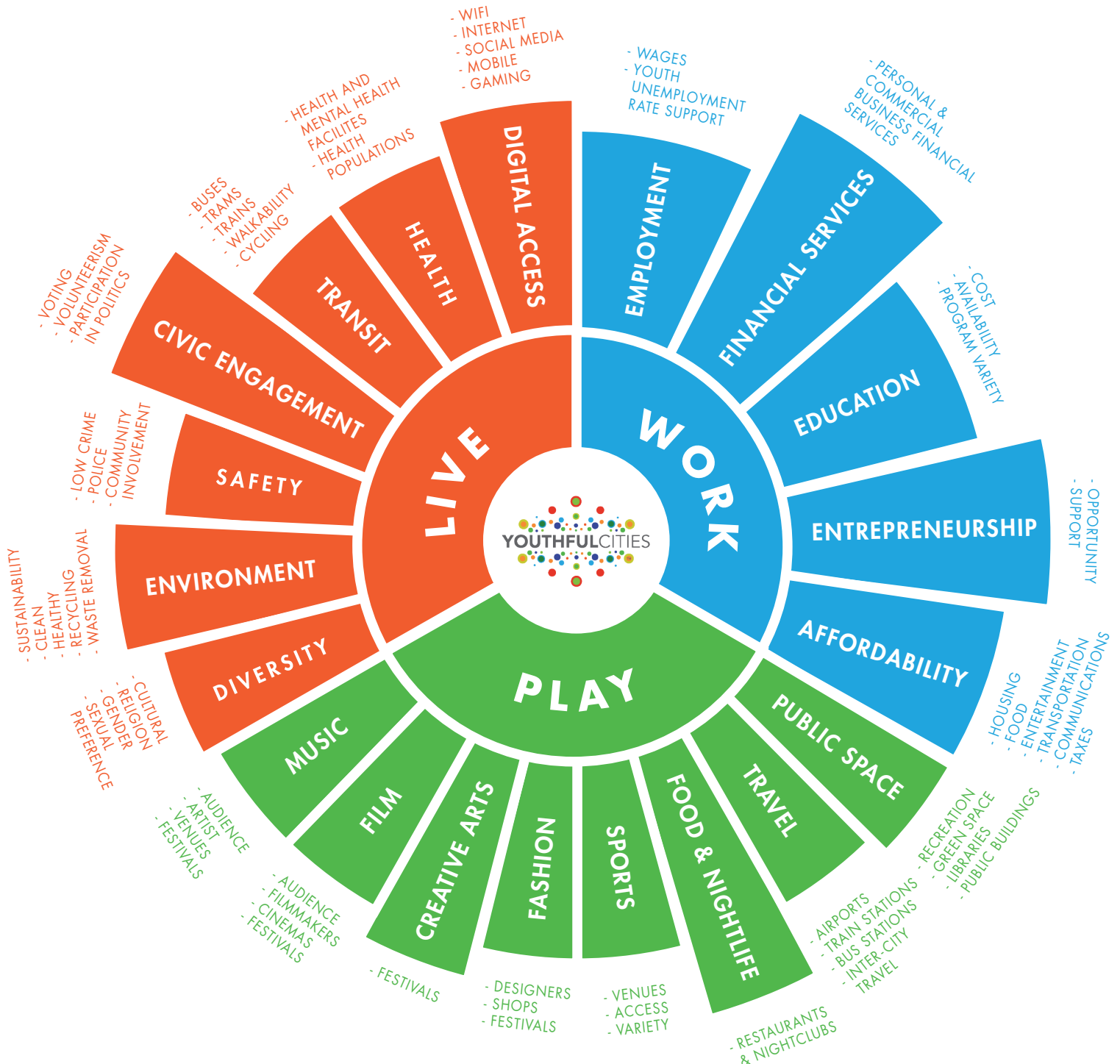
METHODOLOGY

DATA

collected through
internet
and
face-to-face intercepts
from
August–December 2014
over
200 CITIES
represented
8670 YOUTH
between
15-29 YEARS
conducted in
22 LANGUAGES

THE 20 CRITICAL URBAN ATTRIBUTES

According to more than 10,000 youth surveyed since 2013



THE URBAN ATTRIBUTES RATING

PERFORMANCE RATED OUT OF 10

EDUCATION	7.06
FOOD & NIGHTLIFE	6.69
TRAVEL	6.64
FINANCIAL SERVICES	6.49
TRANSIT	6.46
MUSIC	6.43
PUBLIC SPACE	6.32
DIGITAL ACCESS	6.19
CREATIVE ARTS	6.14
DIVERSITY	6.08
HEALTH	6.08
FILM	6.05
SPORTS	6.05
FASHION	5.94
AFFORDABILITY	5.80
EMPLOYMENT	5.78
CIVIC ENGAGEMENT	5.75
SAFETY	5.60
ENTREPRENEURSHIP	5.48
ENVIRONMENT	5.12

Q. Using the same list, we want you to think about how well you think your city PERFORMS in each category on a scale from 1-10

10

IMPORTANCE RATED OUT OF 10

MOST
IMPORTANT

8.79	SAFETY
8.77	AFFORDABILITY
8.70	TRANSIT
8.69	HEALTH
8.64	TRAVEL
8.52	EMPLOYMENT
8.51	ENVIRONMENT
8.43	EDUCATION
8.41	ENTREPRENEURSHIP
8.33	PUBLIC SPACE
8.81	FINANCIAL SERVICES
8.11	DIVERSITY
8.08	DIGITAL ACCESS
7.77	MUSIC
7.74	CREATIVE ARTS
7.62	SPORTS
7.59	FILM
7.55	CIVIC ENGAGEMENT
7.49	FOOD & NIGHTLIFE
7.14	FASHION

0

Q. When you think about living, working and playing in cities, how IMPORTANT are these categories to you on a scale from 1-10?

LOWEST
PERFORMING

- LIVE ATTRIBUTES
- WORK ATTRIBUTES
- PLAY ATTRIBUTES

JUST THE HEADLINES

PERFORMANCE DO THEIR CITIES DELIVER?

OFTEN MISUNDERSTOOD,
YOUTH ARE ACTUALLY
RESPONSIBLE
URBAN CITIZENS.
(P9)

RESPONSIBLE DOESN'T
MEAN BORING –
YOUTH STILL WANT TO
HAVE FUN.
(P10)

YOUTH MAY
BE YOUNG AND
HEALTHY, BUT
HEALTHCARE
STILL MATTERS.
(P11)

YOUTH WILL
**VOTE WITH
THEIR FEET**
AND GO WHERE THEIR
INTERESTS AND
CITY PRIORITIES ALIGN.
(P12)

IMPORTANCE WHAT DO YOUTH WANT?

GETTING DOWN
TO BUSINESS:
CITIES LACK THE VISION
TO PUT URBAN
**YOUTH TO
WORK.**
(P13)

GREENER
CITIES ARE AN
UNTAPPED RESOURCE
OF URBAN PRIDE.
(P14)

CITIES ARE NOT
DOING ENOUGH TO
**ENGAGE
YOUTH –**
BUT DOES IT MATTER?
(P15)

IN THE
DIGITAL AGE,
DIGITAL IS LESS IMPORTANT
THAN YOU THINK.
(P16)

OFTEN MISUNDERSTOOD, YOUTH ARE ACTUALLY RESPONSIBLE URBAN CITIZENS.

Youth said that Safety (#1i), Affordability (#2i), and Transit (#3i) are the most important attributes of a city. Surprised? We're not! Youth often get a bad rap because of common associations with nightlife, violence, unemployment and disengagement. But the youth we spoke to resoundingly demonstrated what we already knew – cities are good for youth and youth are great for cities. Safety and Affordability were almost universally rated first or second on importance, regardless of region, age or gender. Youth citizens are responsible citizens.

WHO'S ON THE RIGHT TRACK?

In our 2014 YouthfulCities Index, the top 3 cities for TRANSIT were:

- 1 BUENOS AIRES
- 2 BERLIN
- 3 DALLAS

WHO'S LEADING THE PACK THIS YEAR?

Our 2015 YouthfulCities Index, launches April 30, 2015.

READING NOTE:

Beside each mention of a ranking number (in brackets) we've included an 'i' which indicates 'importance', or a 'p' which indicates 'performance'.

The downside? All three attributes – Safety, Affordability and Transit – currently have the biggest gap between what youth want and how youth see their cities performing. Are cities safe for youth? Crime often disproportionately affects them. Can youth afford to live where they work and play? Often youth are forced into long commutes for education and employment opportunities. Is transit designed with youth in mind? They need it to get around the city, but is it easy, affordable, convenient and safe to use? Too many times the answers are no. If we believe that what youth want in terms of safety, affordability and transit are what all citizens want then what's good for youth is good for all citizens. City leaders need to listen to their younger citizens and enact positive change.

"Younger (and young thinking) adults tend to be more concerned with social and environmental issues. They have not seen so many failures as to feel jaded and hopeless. Their energy can start and continue movements that inspire people of all ages to be involved."

- APRYL,
TOKYO



RESPONSIBLE DOESN'T MEAN BORING – YOUTH STILL WANT TO HAVE FUN.

Although lower on the list of importance, youth still said fun was an essential part of their urban experience – especially Travel (#5i) and Access to Public and Green Space (#10i). Youth rated these highest of the 'play' attributes of cities. In addition to Travel and Access to Public and Green Space, Music, Art, Sport, Film, Fashion and Food also remain important attributes in building a youthful city.

Interestingly, the 'play' attributes are the ones where, overall, cities are doing a much better job delivering the desired youth experience. And typically these attributes are the ones

cities promote and talk about the most – they give real character, vibrancy and energy to a city's makeup. So are cities bragging about something that doesn't matter? Not at all.

But just because they're lower on the list, doesn't mean they're not important. In fact, youth rated Music, Art, Sport, Film, Fashion and Food all higher than 7 out of 10 in terms of importance. So why are they lower down on the list? Interest in these attributes is more fragmented – youth don't all agree on the relative importance of each one. While Safety gets high ratings universally, Sports, for example, varies in terms of how important it is to different people – youth are either passionate about it, or not. But this diversity of opinion is what makes cities great.

WHO'S ON THE RIGHT TRACK?

In our 2014 YouthfulCities Index, the top 3 cities for PLAY were:

- 1 BERLIN
- 2 PARIS
- 3 CHICAGO

WHO'S LEADING THE PACK THIS YEAR?

Our 2015 YouthfulCities Index, launches April 30, 2015.

"This is especially important when it comes to our perception of youth. Responsible youth want to have a good time. It's also important that organizations giving youth responsibility understand that their lives may look very different outside the context [of that responsibility]."

- MORGAN,
TORONTO



YOUTH MAY BE YOUNG AND HEALTHY, BUT HEALTHCARE STILL MATTERS.

Youth are generally amongst the healthiest citizens in a city, yet they still care deeply about Health and Access to Health Services (#4i) – youth say it's among the top five attributes that are important to them. This may come as a surprise if you think youth are reckless, carefree and take on an "I'm invincible" attitude towards their health and well-being. YouthfulCities knows the stereotypes, we just don't like them. This could stem from an increased awareness of health issues in this generation of youth (who hasn't grimaced at the images of anti-smoking campaigns)? It could be an increased access to health-based knowledge – whether online or through digital and media channels, through more accessible health care practitioners, or

through the distribution of more, simplified information about basic health concerns. Either way, youth want access.

It's something that several cities seem to be delivering relatively well according to youth – but there's always room for improvement. We know that youth want accessible, safe and understandable healthcare options that reach them where (and how) they live. Whether preventative, lifestyle, or emergency response, healthcare still matters in the minds of youth!

WHO'S LEADING THE PACK THIS YEAR?

Our 2015 YouthfulCities Index, launches April 30, 2015. Health is a new Attribute for 2015!

"If I want to perform better, do activities, even be able to travel for a conference and come back without feeling tired, my body and mind have to be prepared. So the same way I would "try" eating healthier, sickness prevention is important."

- GRACE
BEIRUT



YOUTH WILL VOTE WITH THEIR FEET AND GO WHERE THEIR INTERESTS AND CITY PRIORITIES ALIGN.

Youth want to travel the world. And they probably will – or already are! The importance of access to other cities (Travel, #5i) showcases the growing mobility and choice youth now have. Not only are political and geographical barriers to travel decreasing around the globe, but youth are becoming increasingly tuned in to the world outside their city and their country. Youth are the largest growing demographic when it comes to travel expenditures. And they're looking for opportunities – and reasons – to explore. International students are a highly sought after group that is increasing in size, and is on the

move. A semester abroad in Europe – sounds great! A graduate degree in Asia – sign us up!

Yet the size of the youth population in North America and Europe is on the decline, forcing cities in these areas to compete to attract and retain youth citizens (and the battle for the best coffee just won't cut it!). Youth bring great ideas, new inventions, youthful energy and financial investment, so cities need to pay attention to why youth come – and why they leave. Because more and more youth will vote with their feet, moving where their interests and city priorities align. Cities that are passionate about unlocking the potential of their youngest citizens will triumph at attracting and retaining this incredible resource

WHO'S ON THE RIGHT TRACK?

In our 2014 YouthfulCities Index, the top 3 cities for GLOBAL & REGIONAL CONNECTIVITY were:

- 1 LONDON
- 2 PARIS
- 3 NEW YORK

WHO'S LEADING THE PACK THIS YEAR?

Our 2015 YouthfulCities Index, launches April 30, 2015.

"I moved to Durban to volunteer and work with LoveWorld Music & Arts Durban. I currently lead a team of over 300 creative people skilled in performing and creative arts. South Africa is rich in culture and they are a people who pride themselves in their past, present and future. Looking back at the years as well as the success recorded so far, it was indeed a great decision moving here."

- OYINDAMOLA,
DURBAN



GETTING DOWN TO BUSINESS: CITIES LACK THE VISION TO PUT URBAN YOUTH TO WORK.

While slightly less important than some basic living attributes, youth feel their cities perform very poorly on Employment (#16p) and Entrepreneurship (#19p). Given the prominence of the globally hot debate around unemployment, it's probably no shock to see that this topic is top of mind. Yet what's remarkable is the lack of action (and resulting performance) on the side of cities. Many cities are lacking the necessary vision to put youth to work. Cities need to get down to business. Nurturing the support for emerging young entrepreneurs can be a city's secret weapon against rampant unemployment – let's get cities working on youth work!

WHO'S ON THE RIGHT TRACK?

In our 2014 YouthfulCities Index, the top 3 cities for EMPLOYMENT were:

- 1 SHANGHAI
- 2 BERLIN
- 3 TOKYO

WHO'S LEADING THE PACK THIS YEAR?

Our 2015 YouthfulCities Index, launches April 30, 2015.

In order to build more youthful, dynamic cities, urban centers need to be attractive and opportunity-rich places to start and grow a career – or a company. Whether youth want to begin their climb up the corporate ladder, or build a business from the ground up, they want opportunities to be productive. And it's not just about creating jobs. Cities should take note that entrepreneurship programs seem to be performing even lower than employment. In a mostly slow global economy youth know they must create their own employment if more traditional access is not there. So the lack of access to entrepreneurship opportunities is even more troubling. Let's create the environments for the next Richard Branson, Steve Jobs or Randa Ayoubi.

"In my city there are a lot of undeclared employment opportunities, and neither the local nor the national governments are working to change that. Furthermore, the national statistics aren't reliable, so it's difficult to find a solution if you don't have a true view of the problem."

- VICKY,
BUENOS AIRES



GREENER CITIES ARE AN UNTAPPED RESOURCE OF URBAN PRIDE.

Youth ranked Environment (#20p) lowest of all the attributes when it came to their city's performance. But they also said Environment (#7i) was one of their top ten important attributes. Environmental sustainability is where we see the biggest gap between what youth want and how cities perform. This is no surprise. It's a topic that's hard to ignore. The combination of significant media play (backed by scientists and big name celebrities alike), and the dramatic changes in global weather causing more frequent and more catastrophic devastation to cities globally, are ensuring environmental sustainability is top of mind

for urban dwellers, young and old. Youth have plainly told us: cities are not doing enough.

But the popularity of the topic, the collective concern, and the level of passion involved is evidence that youth want to be part of the answer. Environmental solutions can be found in cities and youth are ready to help. Greening a city presents a great opportunity to ignite urban pride within young populations. Cities need to commit to making sustainable change – and engaging youth in the process!

WHO'S ON THE RIGHT TRACK?

In our 2014 YouthfulCities Index, the top 3 cities for ENVIRONMENT were:

- 1 BOGOTA
- 2 BUENOS AIRES
- 3 CHICAGO

WHO'S LEADING THE PACK THIS YEAR?

Our 2015 YouthfulCities Index, launches April 30, 2015.

"Climate change is a reality but many people – especially urbanites – are not tuned in to this fact. Rural places seem to have gained a foothold on the climate change resilience measures. I only hope we change the way our cities run to reduce the carbon footprint and emissions of GHGs."

- PLAN,
NAIROBI



CITIES ARE NOT DOING ENOUGH TO ENGAGE YOUTH – BUT DOES IT MATTER?

Absolutely! While Civic Participation (#18i) is almost at the bottom of the list when youth talked about the importance of attributes, it's also at the bottom of the list when it comes to city performance (#17p). Unfortunately, the lack of importance youth placed on civic participation is a global phenomenon, with only a few regional outliers. But is it disengagement, disinterest, or disenfranchisement that is the underlying problem? We see a real issue with the status quo – existing systems and leadership of cities are not prioritizing youth. Not engaging them in discussions. Not listening to their voices.

WHO'S ON THE RIGHT TRACK?

In our 2014 YouthfulCities Index, the top 3 cities for CITIZEN ENGAGEMENT were:

- 1 BUENOS AIRES
- 2 SAO PAULO
- 3 BERLIN

WHO'S LEADING THE PACK THIS YEAR?

Our 2015 YouthfulCities Index, launches April 30, 2015.

But do they want to be engaged? The recent increase of global youth engaging in political advocacy and activism (Arab Springs, Occupy Wallstreet, the Umbrella Revolution in Hong Kong) is clear evidence that the answer is yes!

So we ask: is the low importance of Civic Participation a chicken and egg question or is the lack of available youth civic participation opportunities fuelling a spiral of youth disinterest? Either way, as we saw with the importance of travel and mobility, if youth don't feel like they're heard, they can (and will) go somewhere they will be heard. And while that's great for youth mobility, it's not great for our cities.

"I would say the gaps [in civic participation opportunities] are being filled on the grassroots level through dialogues, advocacy and activism. But we are currently addressing the barrier of communicating issues and needs vertically rather than horizontally. How does city leadership hear these messages?"

- KENNETH,
DETROIT



IN THE DIGITAL AGE, DIGITAL IS LESS IMPORTANT THAN YOU THINK.

Facebook, Twitter, Instagram. Smartphones, tablets, laptops. You name it, youth have it. Or they've created it! Interestingly though, Digital Access (#13i) is relatively low in importance compared to other attributes. It's paradoxical – we live in the digital age, where almost everything can be consumed digitally and content is at the tips of our fingers, almost instantaneously. In cities around the world it's how we communicate, how we do business and (many times) how we live our lives. This generation of youth has never lived without the presence of technology.

Yet it's not something youth consider critically important to how they live, work and play in a city.

How can this possibly be true? We've been wondering the same thing – that's why we look for insights beyond the data. Being a digital native may not be a defining characteristic for this generation of urban youth. For them, digital infrastructure is basic infrastructure – it's a necessity. Watch out Maslow, we may upset your hierarchy.

WHO'S ON THE RIGHT TRACK?

In our 2014 YouthfulCities Index, the top 3 cities for DIGITAL ACCESS were:

- 1 BERLIN
- 2 MUMBAI
- 3 ROME

WHO'S LEADING THE PACK THIS YEAR?

Our 2015 YouthfulCities Index, launches April 30, 2015.

"The needs of the different areas of our lives have led us to become dependent on all things digital. From our social lives, where people rarely print those treasured moments anymore (we like; we share; we comment; we move to the next), to that Skype interview you have as a young professional hoping to land your dream job in Brussels. The importance of digital is past the stage of opting out."

- BOBBY



THE HANDOFF FROM URBAN ATTITUDES SURVEY TO THE YOUTHFULCITIES INDEX

How do cities rank from a youth perspective? That's the simple question we posed in 2013 when we started YouthfulCities. So we set out to design the tools to quantitatively answer that question.

To define what urban attributes matter to youth we designed a massive survey of youth living in cities – the Urban Attitudes Survey. Over two years we have surveyed more than 10,000 youth around the world. The Survey identified 20 urban attributes that fit nicely into three key themes – Live, Work and Play (see page 4 for more details). Youth rated all attributes on a 10 point scale, telling us which ones were most important to them. They also told us how they perceived their city's performance on those same attributes.

THE INDEX 2015

USING THE 20 URBAN ATTRIBUTES
IMPORTANT TO YOUTH AS A
FRAMEWORK, COLLECTS DATA
ABOUT CITIES THAT BUILDS
A GLOBAL RANKING OF
CITIES FROM A YOUTH
PERSPECTIVE.

THE SURVEY 2015

ASKS YOUTH WHAT'S IMPORTANT
TO THEM IN THEIR CITIES AND
HOW THEIR CITY PERFORMS
ON THOSE SAME
MEASURES.

Once we had a clear set of attributes on which to measure the youthfulness of cities, we confidently moved to designing and building the YouthfulCities Index. Within each of our 20 urban attributes we identified key indicators that provide quantifiable measurements of how a city actually performs. For example, within the Live theme, one category is Transit. Within the Transit category, indicators include cost of transit, breadth of transit, hours of operation, bicycle share programs and walkability, to name a few. In total we have developed more than 100 indicators across our 20 urban attributes. With the help of our global youth network, we collect the data for each indicator, in each category, across each theme, in each of the 50+ cities in our index.

Six months of effort by hundreds of youth in some of the world's biggest cities leads to over 5000 points of data – all dated, sourced and then scientifically calculated to build the YouthfulCities Index and answer our founding question: how do cities rank from a youth perspective?

**The 2015 YouthfulCities Index will be
launched on April 30th.**

THE YOUTHFULCITIES ENGINE

YouthfulCities is leading a unique urban regeneration. We are building a global network of 15-29 year olds who dive deep into youth-driven urban knowledge to create far-reaching inventive solutions from youth outward. And, we are illuminating youthful stories around the world. This leads to the 100 biggest cities and their almost one billion inhabitants becoming more connected, dynamic, open, fun, curious and inventive. In other words, more youthful cities. It's a bold direction for a social enterprise that's only two years old. But we're not shy about it. These are the key components that keep our engine moving.

Grow

We continually grow our network, expanding our reach around the world.



Connect

We build and connect our Urban Decoder Network of youth in cities globally.



Survey

We conduct the Urban Attitudes Survey our annual look at what matters to youth in cities around the world.



Gather

We bring together youth from cities around the world at our annual Global Summit.



Rank

We build our annual YouthfulCities Index that measures which cities are best for youth to live work and play in – and celebrate results.

Engage

We work with public and private sector client clients globally, leveraging our network and insights to build more youthful cities and brands.



Activate

We activate young social innovators to create sustainable city solutions.



Share

We spark interesting debate by sharing stories, knowledge and insights that contribute to the global dialogue.



Grow

We continually grow our network, expanding our reach around the world.



JOIN US

YouthfulCities is leading a unique urban regeneration. And we want you to join us.

Are you 15-29? Connected, engaged, curious and inventive? Do you want to be the driving force behind a youth-led regeneration in your city? If you want to join our dynamic global network of 10,000 peers in 50+ cities around the world visit us at:
www.youthfulcities.com/get-involved.

Are you a business leader in search of great insights into the world's largest and most dynamic demographic? Do you want to learn how your business and brand actually live in the lives of users? Do you want to generate ground-breaking new ideas and inventive solutions that help drive your brand and business forward? If you want to work with a global team of researchers, strategists and social innovators, visit us at:
www.youthfulcities.com/get-involved.

Are you a civic leader? A policy maker or municipal strategist? Do you want to drive your city's competitive edge, stimulate development and find new solutions for the most pressing urban problems? Do you want to build a more connected, dynamic, open, fun, curious and inventive city? If you want your city to be involved in our social enterprise, visit us at:
www.youthfulcities.com/get-involved.

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