CityNext: 'Your City, Your Future'
A Survey of Asia Pacific Cities

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Expected changes in city quality of life

- Across the 12 cities, there are more people who are optimistic (42.5%) than pessimistic (32.4%) about future living conditions in Asia Pacific's cities.
- The level of optimism varies widely by city (see city chapters).
- Gen Y and Z are more confident that improvement will occur; Gen X are more pessimistic.
- Men tend to be more negative while women enjoy a more positive outlook.
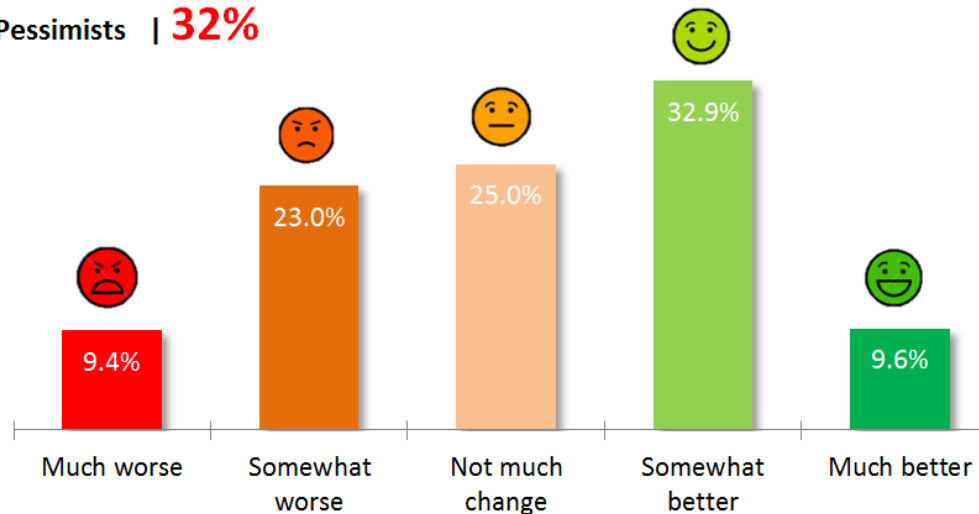
Figure 1
Expectations for Quality of Life Improvement in Asia Pacific's Cities
Over the next 10 years, how do you expect the quality of life to change for people in your city? [ALL 12 CITIES; n =2,012]
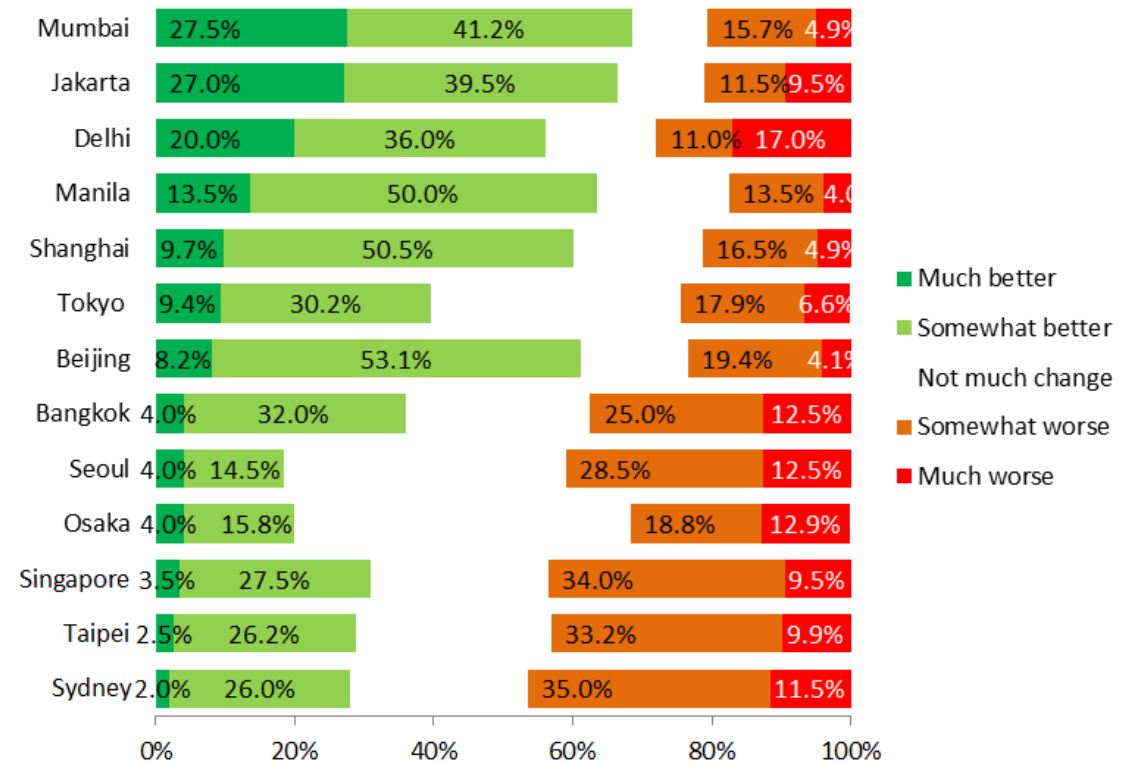
% respondents

Optimists | **43%**
Pessimists | **32%**

9.4%	23.0%	25.0%	32.9%	9.6%
Much worse	Somewhat worse	Not much change	Somewhat better	Much better

- Among all the 12 cities surveyed, Jakartans and Mumbaikars are the most hopeful for a better quality of life in their cities.

- Beijing and Shanghai residents are likewise very optimistic that their cities can deliver better living conditions and prospects for the people.

- In Delhi, most residents are also optimistic, although there was a large minority who believe standards will get "much worse."

- The residents of Singapore, Taipei and Sydney were the most negative about future quality of life improvement in their respective cities.

Figure 2
City Optimists and Pessimists
Over the next 10 years, how do you expect the quality of life to change for people in your city? [n = 2,012]

% respondents

City	Much better	Somewhat better	Somewhat worse	Much worse
Mumbai	27.5%	41.2%	15.7%	4.9%
Jakarta	27.0%	39.5%	11.5%	9.5%
Delhi	20.0%	36.0%	11.0%	17.0%
Manila	13.5%	50.0%	13.5%	4.0
Shanghai	9.7%	50.5%	16.5%	4.9%
Tokyo	9.4%	30.2%	17.9%	6.6%
Beijing	8.2%	53.1%	19.4%	4.1%
Bangkok	4.0%	32.0%	25.0%	12.5%
Seoul	4.0%	14.5%	28.5%	12.5%
Osaka	4.0%	15.8%	18.8%	12.9%
Singapore	3.5%	27.5%	34.0%	9.5%
Taipei	2.5%	26.2%	33.2%	9.9%
Sydney	2.0%	26.0%	35.0%	11.5%

Legend:
- Much better
- Somewhat better
- Not much change
- Somewhat worse
- Much worse

- Being more affluent does not necessarily make people more optimistic about their future. The residents of cities located in the so-called developed economies, such as Osaka, Sydney, Taipei, Singapore and Seoul are much more likely to be pessimistic about maintaining their quality of life than the residents of Asia's poorer metropolises.

- Affluent city expectations about the limited scope for further improvements in the quality of life may be the cause for the relatively small percentage of city residents that expect quality of life improvements. However, a large proportion of residents in these well-off cities also predict deterioration in their quality of life.
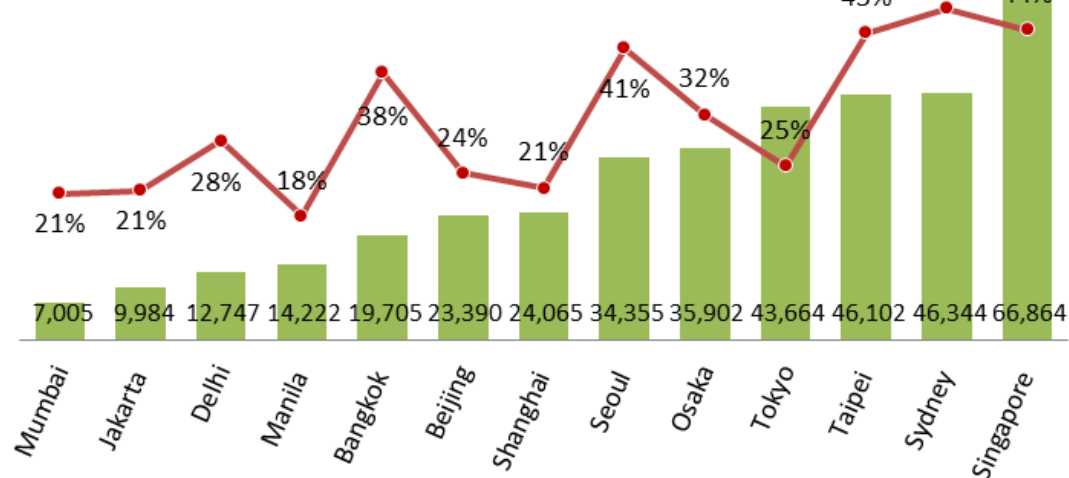
Figure 3
Affluence and Expectations
Over the next 10 years, how do you expect the quality of life to change for people in your city? [n = 2,012]

% respondents

▇ City GDP per capita, 2014 (PPP, US$)

━●━ % respondents expecting deteriorating quality of life

Source: Intercedent Asia, Brookings Global Metro Monitor 2014 (City GDP per head)

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Quality of life improvements needed

When asked what quality of life improvements are needed, city residents highlighted numerous issues, the top 5 of which:

(1) Better transportation infrastructure and traffic conditions (30% of all respondents)—a particular bugbear for Sydneysiders, Mumbaikars, Delhiites, Jakartans and the residents of Manila, Taipei and Bangkok.

(2) Pollution and the environment; not surprisingly a critical concern for Beijingers, and residents of Shanghai (also Taipei).

(3) The cost of living as it impacts overall living standards

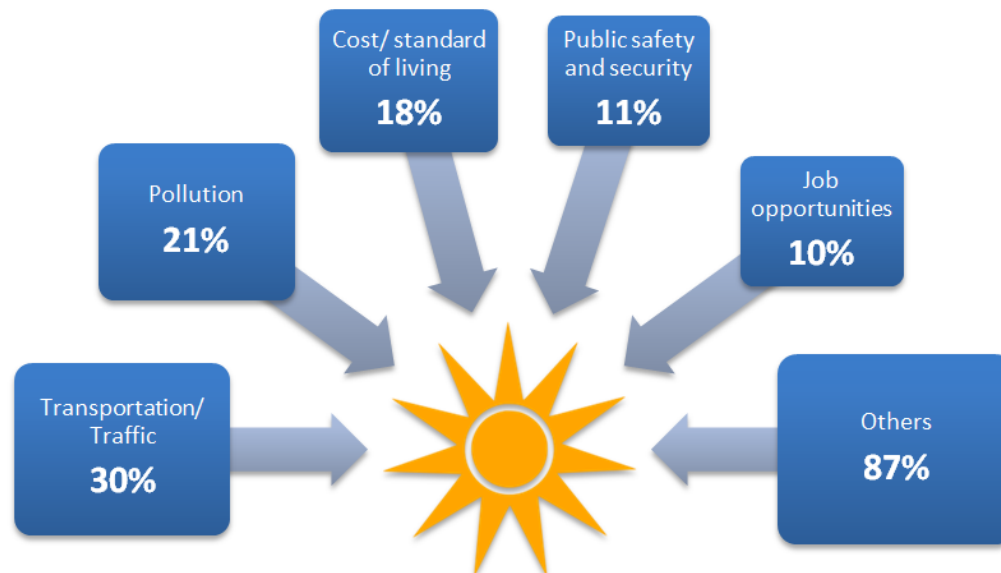(4) Public safety and security

(5) Employment opportunities

Figure 4

Most Needed Quality of Life Improvements

What quality of life improvements do you want to see in your city (in the next 10 years)?
[Open-ended; n = 2,012]

% respondents suggesting area of improvement [coded response]

In order of importance, other needed improvements include:

- Urban renewal (Structures, Parks, Slums) – 9.4%
- Better Healthcare – 8.8%
- Better Housing – 7.4%
- Improved Education – 6.4%
- Waste management and disposal (incl. sewage/sanitation, Hygiene, littering, dirty streets) – 5.8%
- Stronger emphasis on Social welfare / poverty – 5.3%
- A stable economy – 5.3%
- Technology / ICT deployment – 4.9%
- Social / Racial harmony – 4%
- City government / planning – 3.8%
- The arts and entertainment – 3.7%
- Better facilities (shopping / childcare / elderly etc.) – 2.8%
- Lees corruption – 2.5%

- The importance of weaknesses will vary by city. However, when prompted, there was some general agreement as to most common problems faced by Asia's cities.

- Transportation and traffic congestion is a common issue for almost all the cities.

- Pollution, Public Safety and Employment were also cited as major concerns.
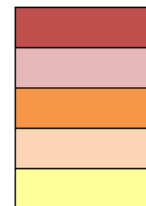
Figure 5

Key Issues Heat Map by City

To make your city more livable for everyone, which are the areas that need improvement? [prompted; n = 2,012]

% of respondents

	SYD	BJ / SH	DEL / MUM	JKT	TOK / OSA	MLA	SG	SEL	TPE	BKK	Total
Transportation	75%	70%	63%	82%	40%	90%	70%	58%	77%	80%	70%
Pollution	40%	77%	75%	71%	25%	77%	50%	66%	77%	70%	63%
Public safety	52%	41%	67%	78%	45%	89%	41%	65%	65%	75%	62%
Employment	59%	42%	66%	77%	29%	80%	73%	66%	55%	52%	60%
Housing	66%	54%	52%	66%	27%	69%	71%	63%	68%	60%	59%
Healthcare	55%	56%	59%	72%	35%	74%	66%	47%	37%	67%	57%
Education	51%	42%	65%	74%	33%	73%	41%	41%	39%	60%	52%
Waste management	29%	34%	63%	72%	33%	79%	32%	37%	51%	60%	49%
Urban design	41%	32%	47%	64%	47%	54%	28%	35%	48%	64%	46%
Water management	21%	38%	66%	67%	22%	52%	28%	46%	32%	54%	42%
Power	18%	14%	49%	57%	14%	38%	13%	21%	22%	45%	29%
Arts and entertainment	21%	15%	21%	42%	12%	27%	23%	28%	31%	27%	25%

Legend

Top concern	
2nd concern	
3rd concern	
4th concern	
5th concern	

SYD - Sydney   BJ / SH - Beijing / Shanghai
JKD - Jakarta   TPE - Taipei
SG - Singapore   TOK / OSA - Tokyo / Osaka
BKK - Bangkok   SEL - Seoul
MLA - Manila   MUM / DL - Mumbai / Delhi

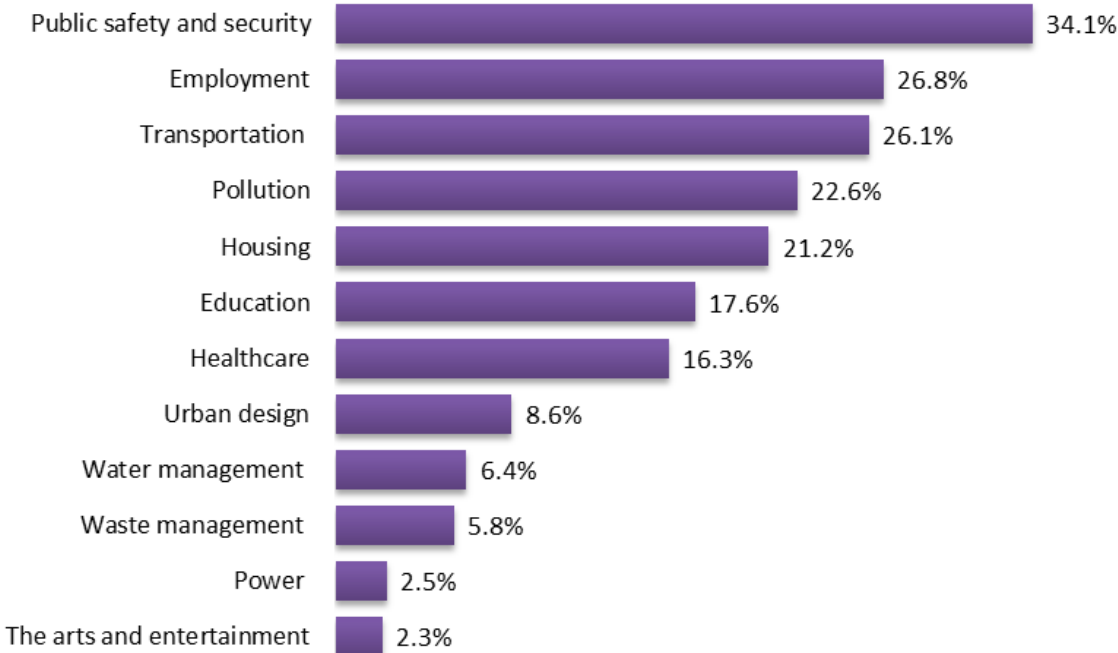Note: Japan's prioritization of Urban Design includes concern for earthquake-proof buildings

The priorities for more liveable cities

- Public Safety & Security is the top priority for the city dwellers (all 12 cities) with 34.1% of city residents stating law and order was their 1st or 2nd priority. All age groups agreed that Public Safety and Security is the #1 priority; women are most concerned.

- Employment and Transportation are also important issues for cities to address, followed by Pollution, Housing, Education and Healthcare. Across the cities surveyed, improvement in utilities and the Arts & Entertainment were not as highly ranked.

Figure 6
Priority Issues for Asia Pacific's Cities
Please rank these areas [those in need of improvement] in order of importance. [Prompted; n = 2,012]

% respondents ranking issues as the 1st or 2nd priority

Issue	%
Public safety and security	34.1%
Employment	26.8%
Transportation	26.1%
Pollution	22.6%
Housing	21.2%
Education	17.6%
Healthcare	16.3%
Urban design	8.6%
Water management	6.4%
Waste management	5.8%
Power	2.5%
The arts and entertainment	2.3%

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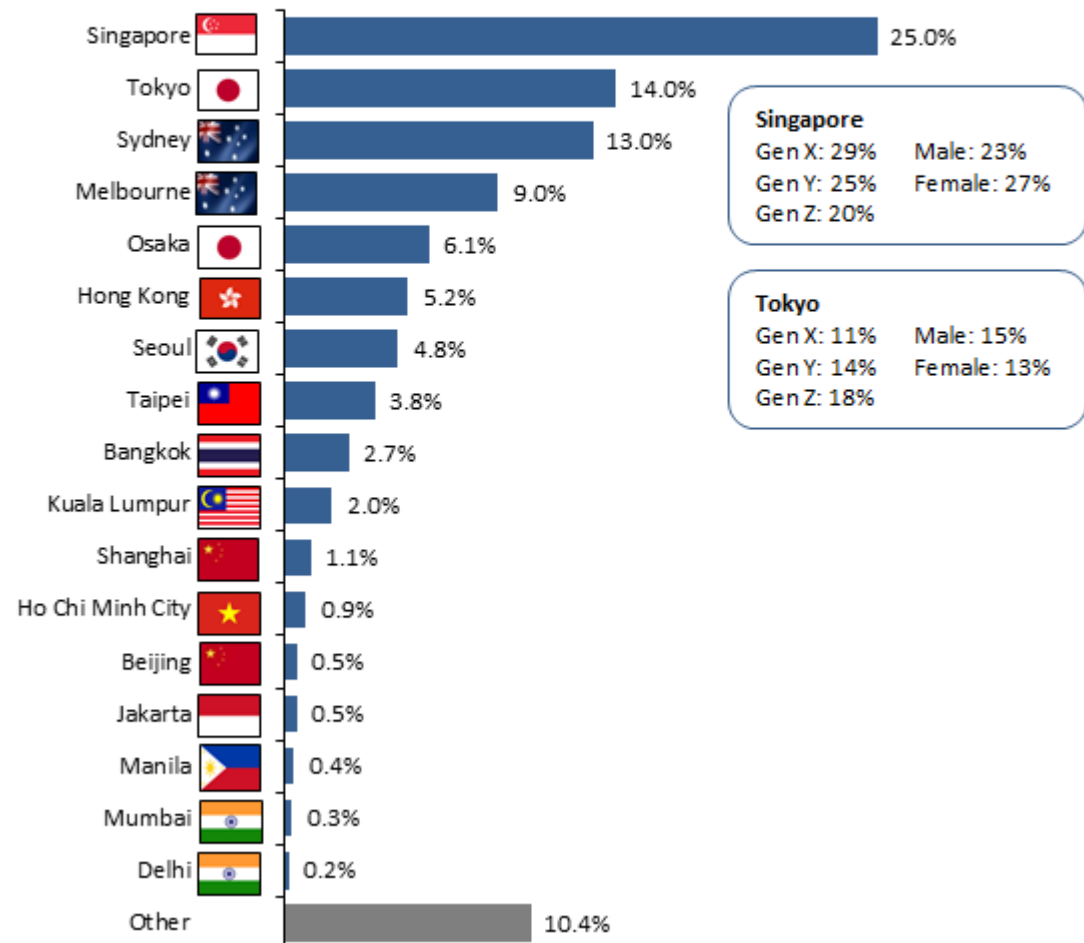
Most admired cities

- Singapore is the clear favourite among Asian cities. Although this approval may reflect a greater familiarity with Singapore, given its status as a travel hub, it is a ringing endorsement of the city-state nonetheless.

- The older generations, and all generations of women, were even more strongly in favour of Singapore; men and younger Gen Y/Zs were more inclined to admire Tokyo.

- Japanese and Australian cities were considered desirable. Hong Kong, Seoul, Taipei and Bangkok also had some admirers.

Figure 7
Favourite Cities in Asia Pacific
In which big Asian city, outside your home country, would you most like to live in?
[Prompted; all cities, n = 2,012]

% respondents

City	%
Singapore	25.0%
Tokyo	14.0%
Sydney	13.0%
Melbourne	9.0%
Osaka	6.1%
Hong Kong	5.2%
Seoul	4.8%
Taipei	3.8%
Bangkok	2.7%
Kuala Lumpur	2.0%
Shanghai	1.1%
Ho Chi Minh City	0.9%
Beijing	0.5%
Jakarta	0.5%
Manila	0.4%
Mumbai	0.3%
Delhi	0.2%
Other	10.4%

Singapore
Gen X: 29%   Male: 23%
Gen Y: 25%   Female: 27%
Gen Z: 20%

Tokyo
Gen X: 11%   Male: 15%
Gen Y: 14%   Female: 13%
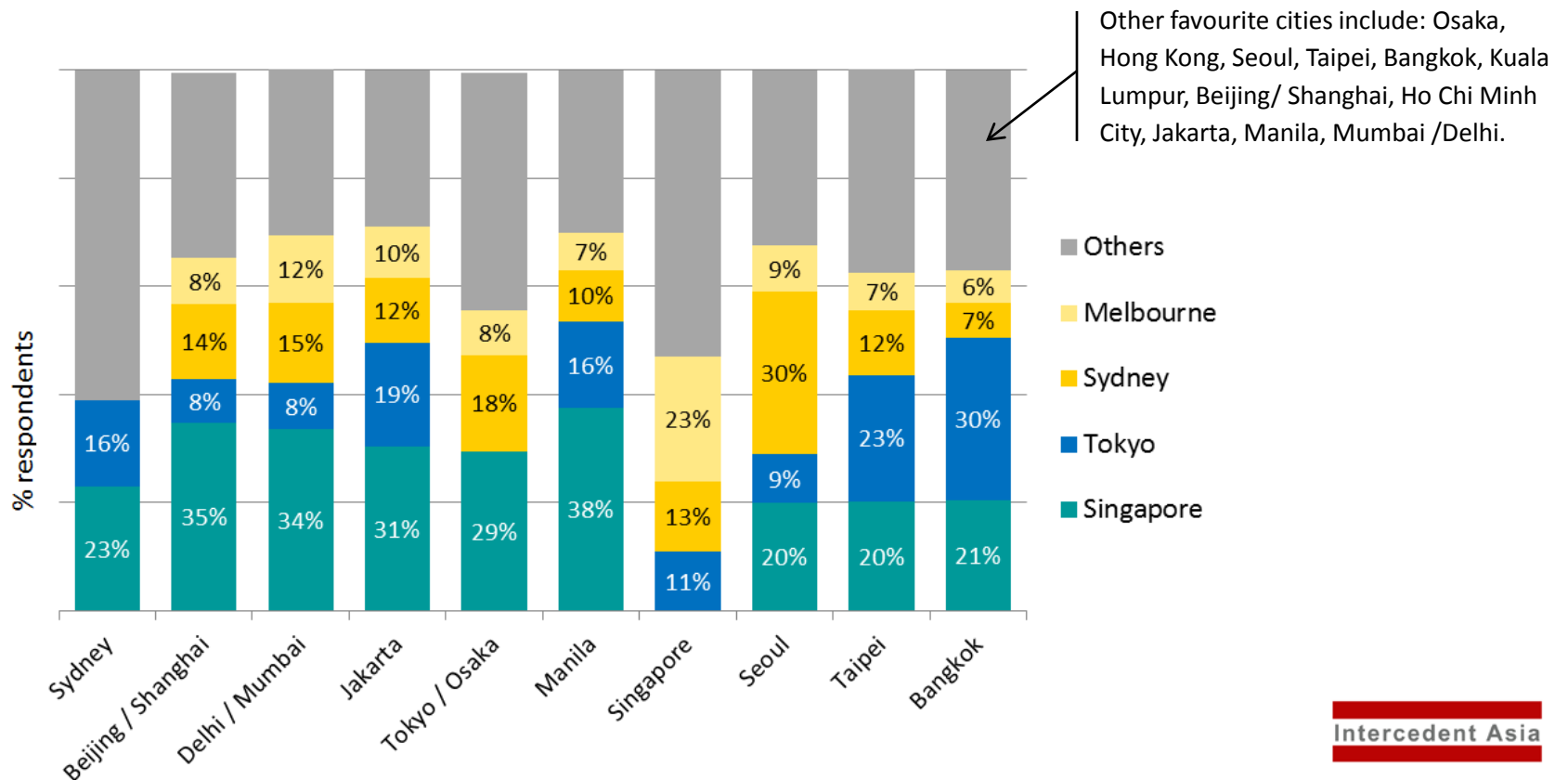Gen Z: 18%

Each city has its own favourite city:

- Singaporeans and Koreans prefer Sydney/Melbourne
- Chinese, Indians, Indonesians and Filipinos would opt for Singapore
- Taiwanese and Thais like the idea of living in Japan

- Sydneysiders would prefer to stay in Australia
- The Japanese are divided between Australia and Singapore

Figure 8
Favourite Cities by City
In which big Asian city, outside your home country, would you most like to live in?
[Prompted; all cities, n = 2,012]

Other favourite cities include: Osaka, Hong Kong, Seoul, Taipei, Bangkok, Kuala Lumpur, Beijing/ Shanghai, Ho Chi Minh City, Jakarta, Manila, Mumbai /Delhi.

- The leading reasons for city envy: Cleanliness, Disciplined society, Public safety; Cool/exciting place to live city (13%); Beautiful looking; good transport/facilities
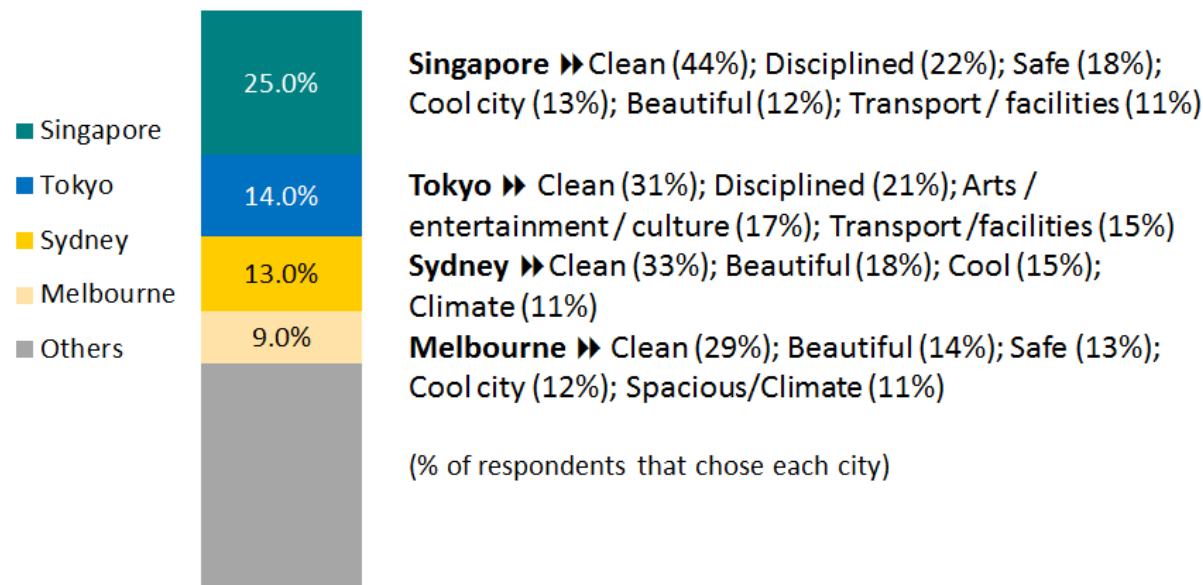
Figure 9
Reasons for City Envy by most Popular Cities
Could you please explain why you have chosen this Asian city? [Open-ended; n = 2,012]

% of respondents / % of respondents that chose each city

Most admired cities

- Singapore — 25.0%
- Tokyo — 14.0%
- Sydney — 13.0%
- Melbourne — 9.0%
- Others

Singapore ▶ Clean (44%); Disciplined (22%); Safe (18%); Cool city (13%); Beautiful (12%); Transport / facilities (11%)

Tokyo ▶ Clean (31%); Disciplined (21%); Arts / entertainment / culture (17%); Transport /facilities (15%)

Sydney ▶ Clean (33%); Beautiful (18%); Cool (15%); Climate (11%)

Melbourne ▶ Clean (29%); Beautiful (14%); Safe (13%); Cool city (12%); Spacious/Climate (11%)

(% of respondents that chose each city)

Other reasons for admiring overseas cities include:
- Public Transport / facilities – 9%
- Standard of living – 7%
- Good government / governance / planning – 6%
- Harmonious / tolerant – 5%
- Friendly / caring people – 5%
- Climate – 5%
- Cuisine (food) – 4%
- Employment opportunities – 4%
- Stable government / economy – 4%
- Inexpensive place to live in – 3%
- Health and education systems – 3%
- Not crowded / spacious – 3%
- Slow pace of life / less stress – 3%

Also: Technologically advanced, similar culture/religion and personal and food hygiene.

The role of technology

Technology tools are thought to be important catalysts for improving cities' living conditions.
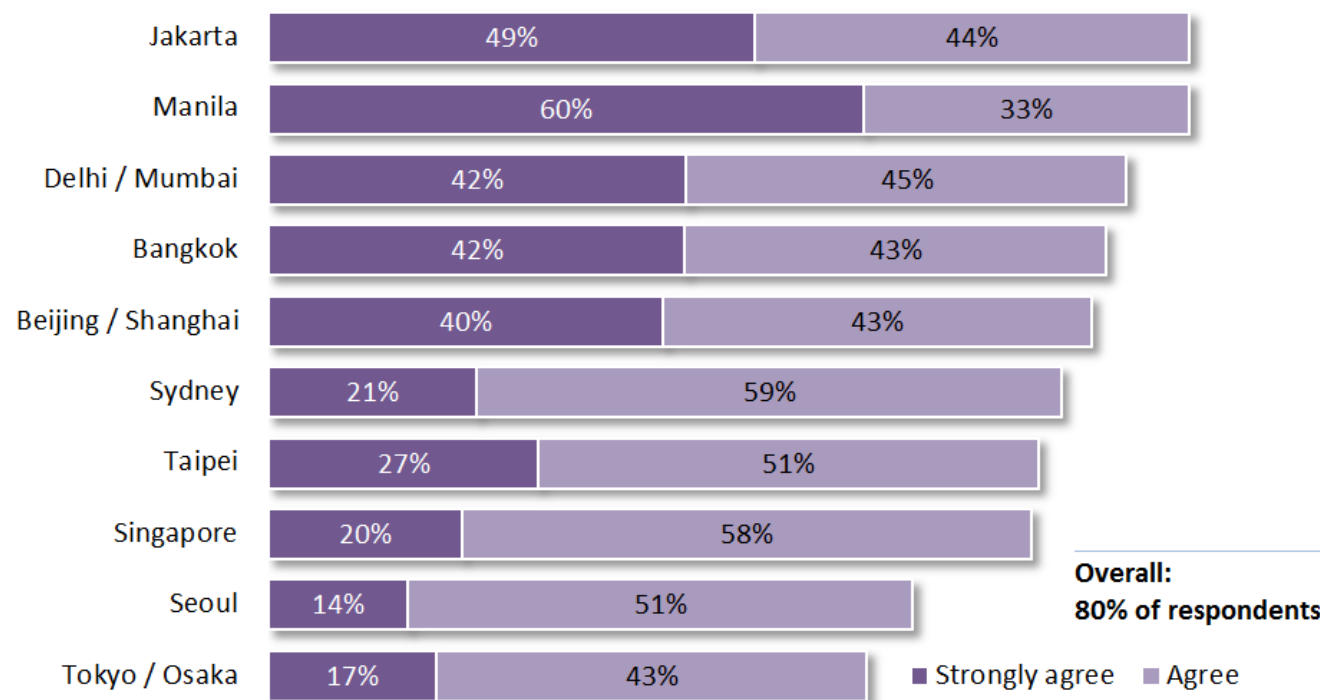
- The most influential factor is thought to be the provision of Information to Residents: 80% of respondents "agreed' or "strongly agreed"

- The least influential initiative is Big Data Analytics with 72% of respondents agreeing this would help improve living conditions. (The full uses and implications of Big Data may not have been apparent to all the respondents.)

- Men felt Improving Communications would be the most powerful tool; women thought it was Delivering Information to residents

- Residents living in Manila, Jakarta, Delhi/Mumbai also felt that improving communications was the best role for technology

The Role of Technology

To what extend do you agree or disagree that using technology to deliver the initiatives below can significantly improve living conditions in your city?

% of respondents agree/disagree to specific technology tools

❶ Information to Residents about City services

City	Strongly agree	Agree
Jakarta	49%	44%
Manila	60%	33%
Delhi / Mumbai	42%	45%
Bangkok	42%	43%
Beijing / Shanghai	40%	43%
Sydney	21%	59%
Taipei	27%	51%
Singapore	20%	58%
Seoul	14%	51%
Tokyo / Osaka	17%	43%

Overall: 80% of respondents

■ Strongly agree ■ Agree

- By delivering information to residents about City services

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❷ Better Connectivity (Wi-Fi and cellular)

City	Strongly agree	Agree
Jakarta	46%	44%
Bangkok	58%	32%
Manila	58%	29%
Singapore	36%	49%
Delhi / Mumbai	47%	36%
Sydney	38%	40%
Beijing / Shanghai	33%	44%
Taipei	36%	40%
Seoul	19%	46%
Tokyo / Osaka	19%	43%

Overall:
79% of respondents

■ Strongly agree   ■ Agree
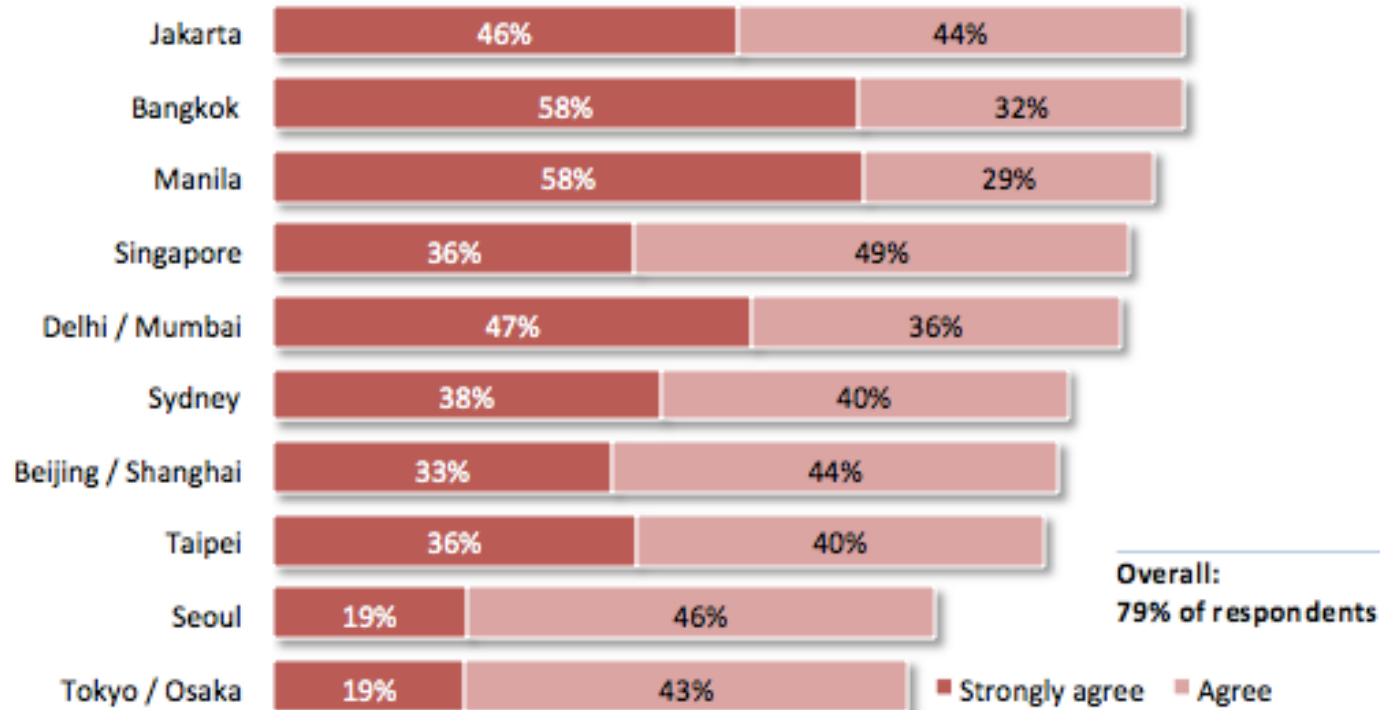
- By providing better connectivity (e.g. Wi-Fi and cellular networks)

❸ Improving Communications between the people and City

City	Strongly agree	Agree
Manila	56%	34%
Jakarta	45%	45%
Delhi / Mumbai	42%	45%
Bangkok	37%	47%
Beijing / Shanghai	40%	43%
Singapore	22%	54%
Taipei	27%	46%
Sydney	24%	45%
Seoul	15%	51%
Tokyo / Osaka	17%	43%

Overall:
77% of respondents

■ Strongly agree ■ Agree
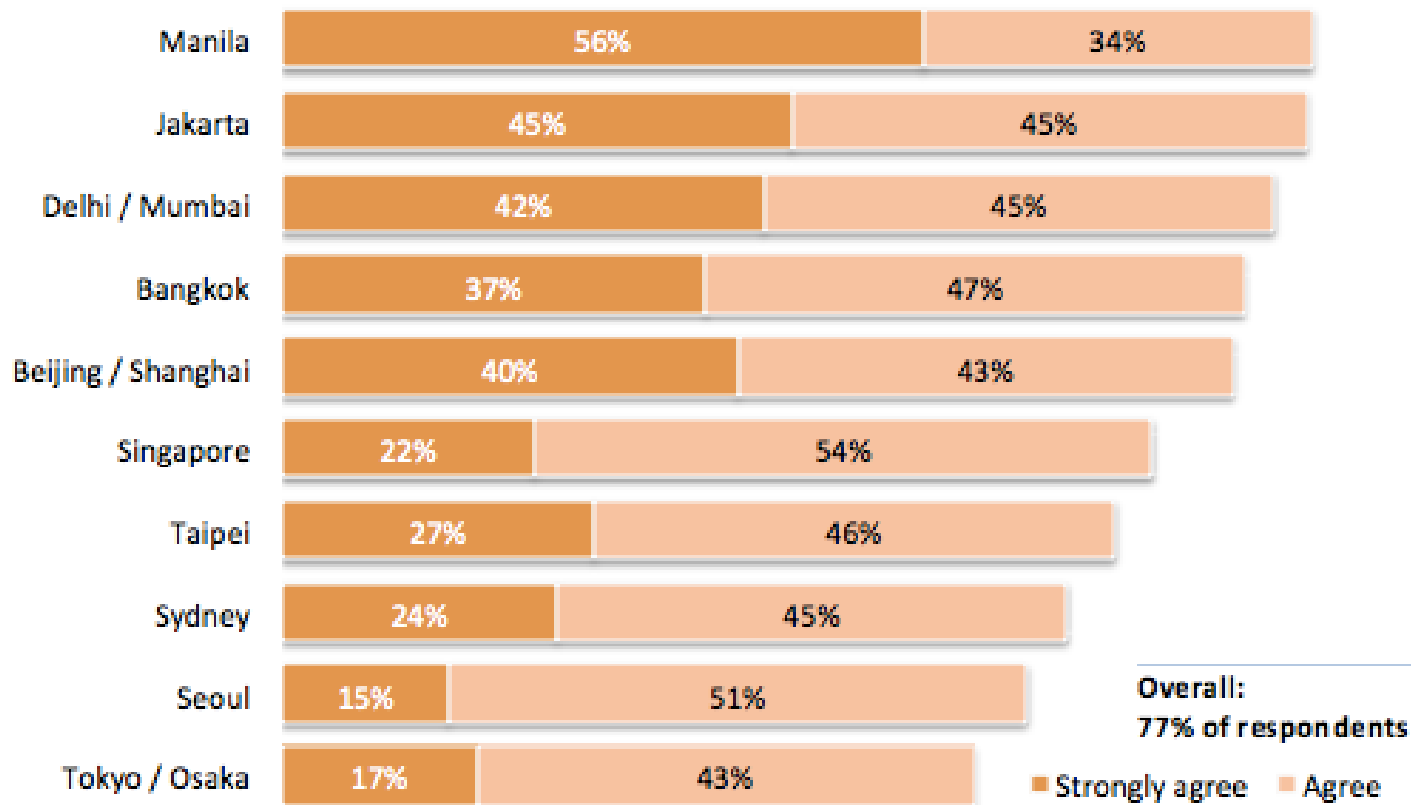
- By improving communications between the people and the City (citizen engagement)

❹ Economic Opportunities (e.g. through start-ups)

City	Strongly agree	Agree
Manila	60%	34%
Jakarta	40%	48%
Bangkok	42%	45%
Delhi / Mumbai	47%	36%
Beijing / Shanghai	36%	44%
Singapore	32%	47%
Sydney	30%	44%
Taipei	27%	42%
Seoul	22%	43%
Tokyo / Osaka	12%	36%

Overall:
77% of respondents

■ Strongly agree ■ Agree
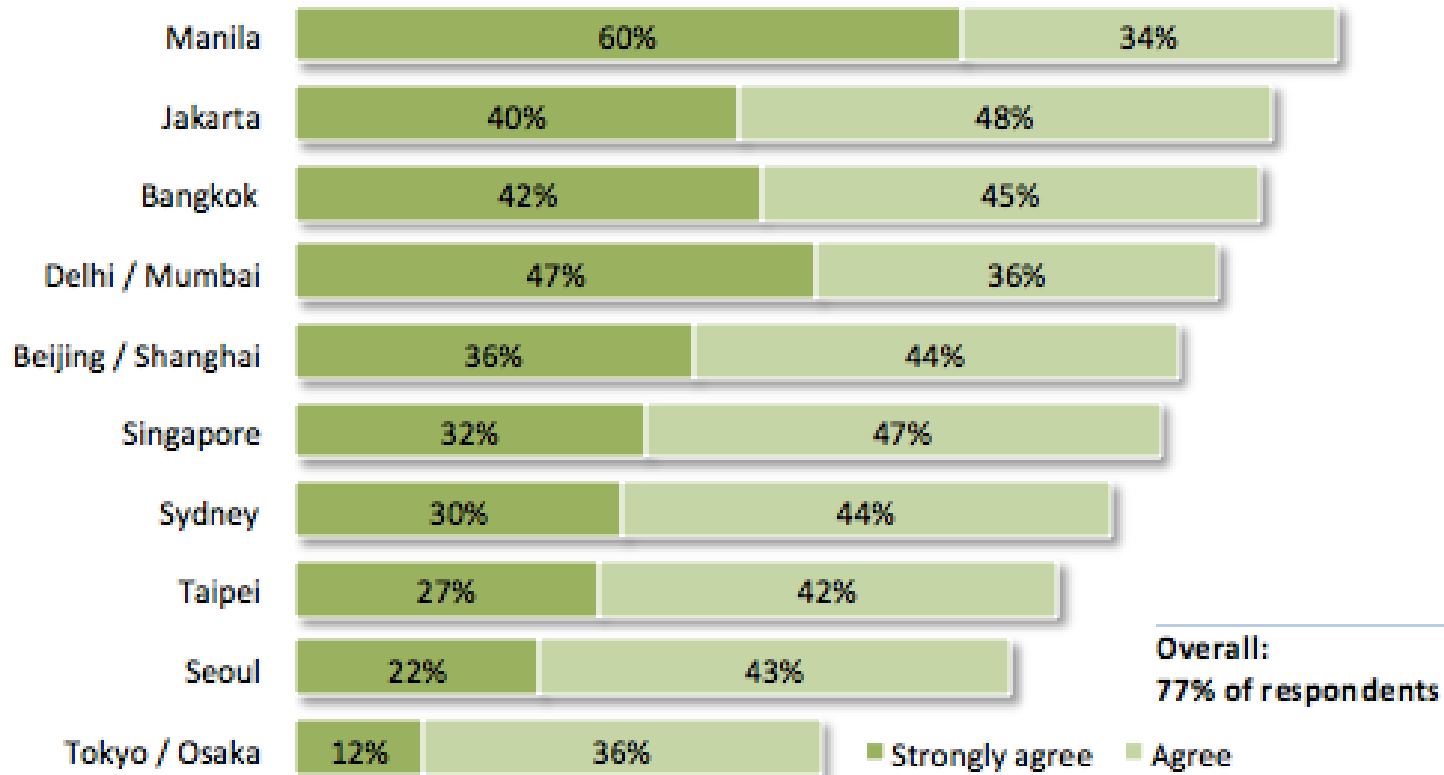
- By creating new economic opportunities (start-ups, for example)

❺ Big Data Analytics enabling the city to better plan

City	Strongly agree	Agree
Manila	39%	49%
Jakarta	37%	48%
Beijing / Shanghai	31%	50%
Bangkok	39%	41%
Delhi / Mumbai	35%	44%
Sydney	19%	50%
Taipei	27%	40%
Singapore	14%	51%
Seoul	12%	52%
Tokyo / Osaka	11%	40%

Overall:
72% of respondents

■ Strongly agree ■ Agree
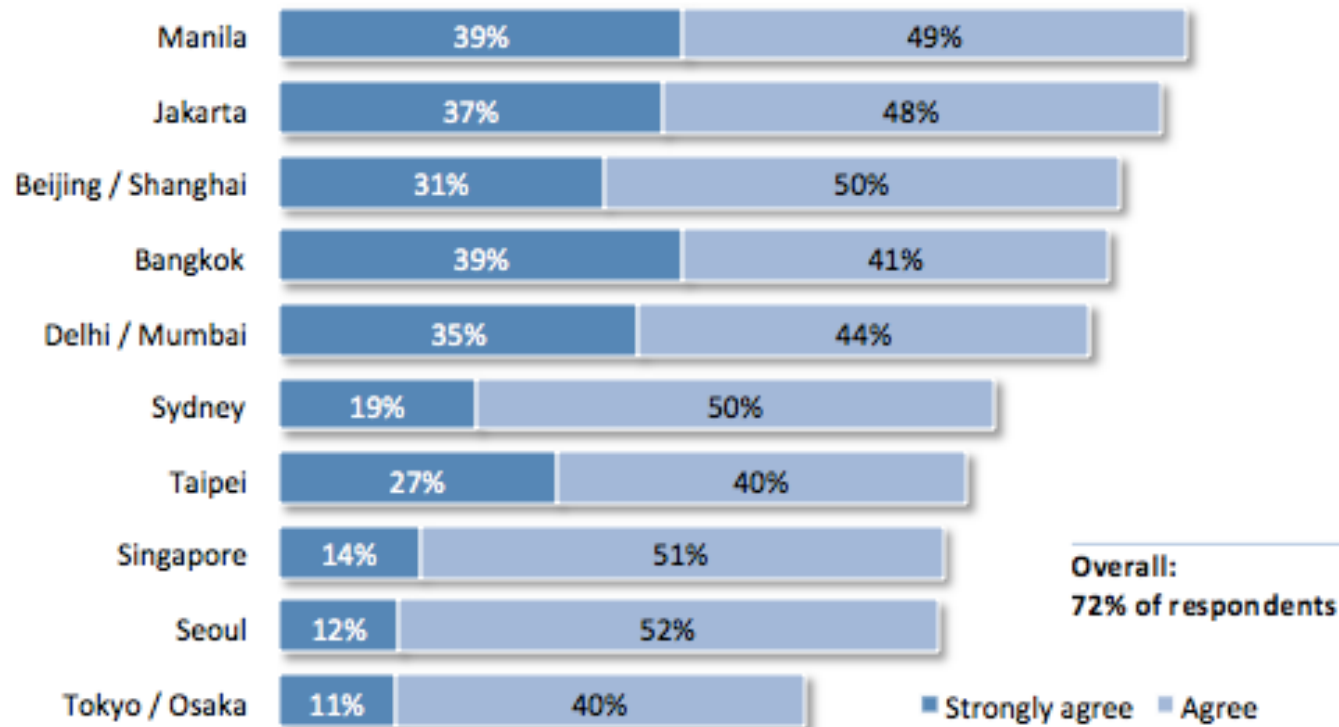
- Through Big Data Analytics (so that the City can plan better based on data)

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Survey demographics

1. SAMPLE SIZE AND SAMPLE FRAME

n=2,012 split more or less evenly between 10 cities or city pairs.

Bangkok (n=200)
Beijing / Shanghai (n=98/103)
Delhi / Mumbai (n=100/102)
Jakarta (n=200)
Manila (n=200)
Seoul (n=200)
Singapore (n=200)
Sydney (n=200)
Taipei (n=202)
Tokyo / Osaka (n=106/101)

Sample frame:
- Generation X (Gen X, born between the years 1966-76)
- Generation Y (Gen Y, born between the years 1977-94, also known as 'Millennials')
- Generation Z (Gen Z, born after 1995)

Statistical confidence

All Asia Pacific (n=2,012)
Confidence level = 95%
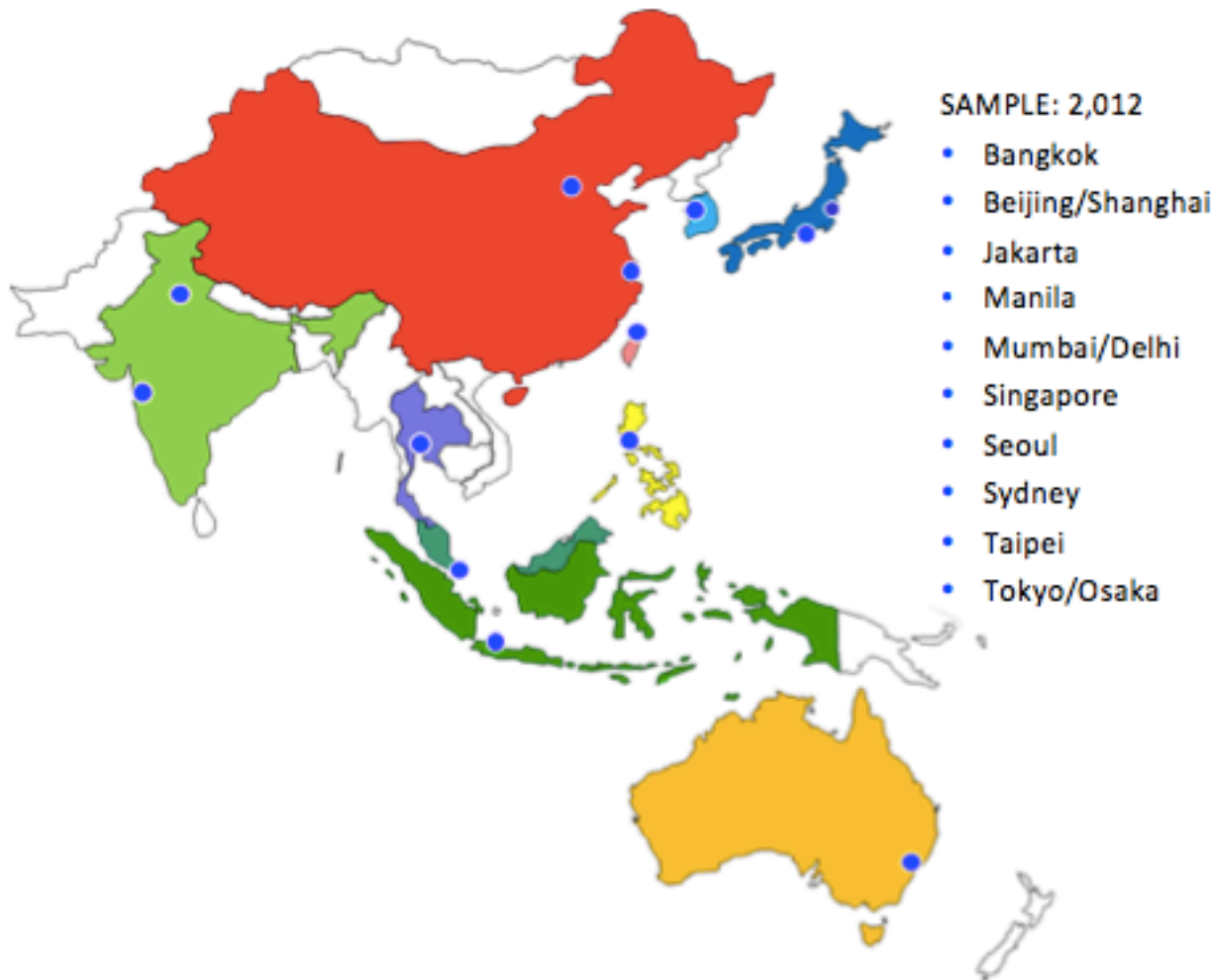Margin of error = 2.2%

By country/city (n=~200)
Confidence level = 95%
Margin of error = 6.9%

The Margin of Error and Confidence Level are the amounts of error and uncertainty tolerated respectively.

2. **RESPONDENTS BY LOCATION**

SAMPLE: 2,012
- Bangkok
- Beijing/Shanghai
- Jakarta
- Manila
- Mumbai/Delhi
- Singapore
- Seoul
- Sydney
- Taipei
- Tokyo/Osaka

RESPONDENT PROFILE – BY AGE AND SEX
[n=2,012]

e survey included persons between the ages of
and 50 corresponding to the so-called
enerations X, Y, and Z.

Gen Z 29%
Gen X 35%
Gen Y 36%

48% Male   **52%** Female