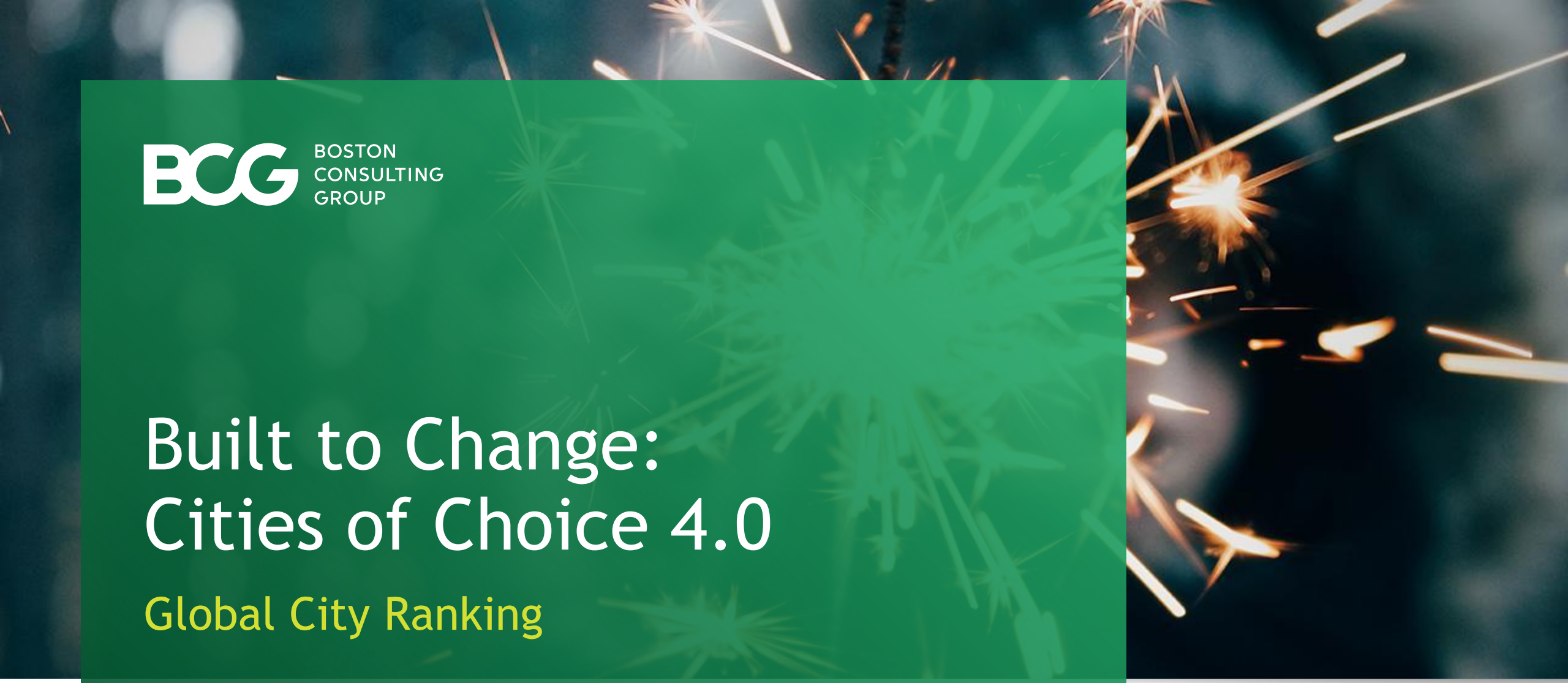

BOSTON CONSULTING GROUP

# Built to Change: Cities of Choice 4.0

## Global City Ranking

Full report

CENTER FOR The Future of Cities

BCG HENDERSON INSTITUTE

MAY 2026

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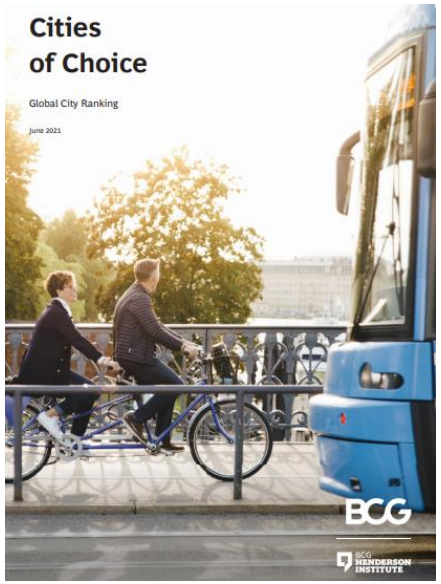
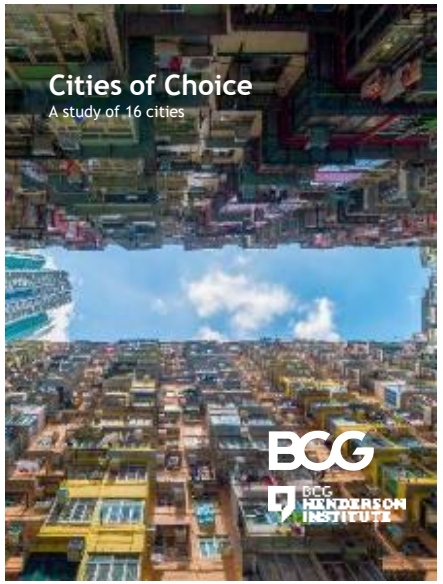
Section 1

# Our approach and key insights

# Three editions of *Cities of Choice* have been published, and a fourth edition, *Built to Change*, was launched at World Urban Forum 13 in Baku in May

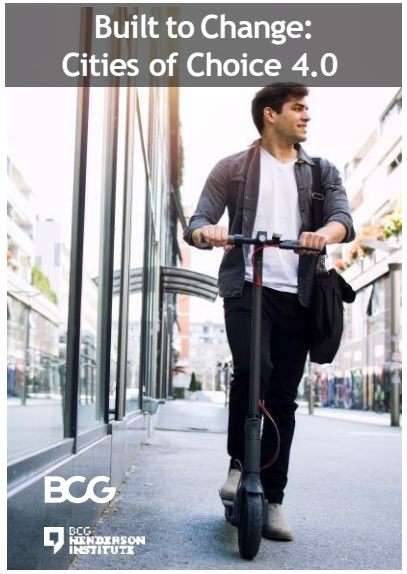



2019–2020




2020–2021


2022–2023



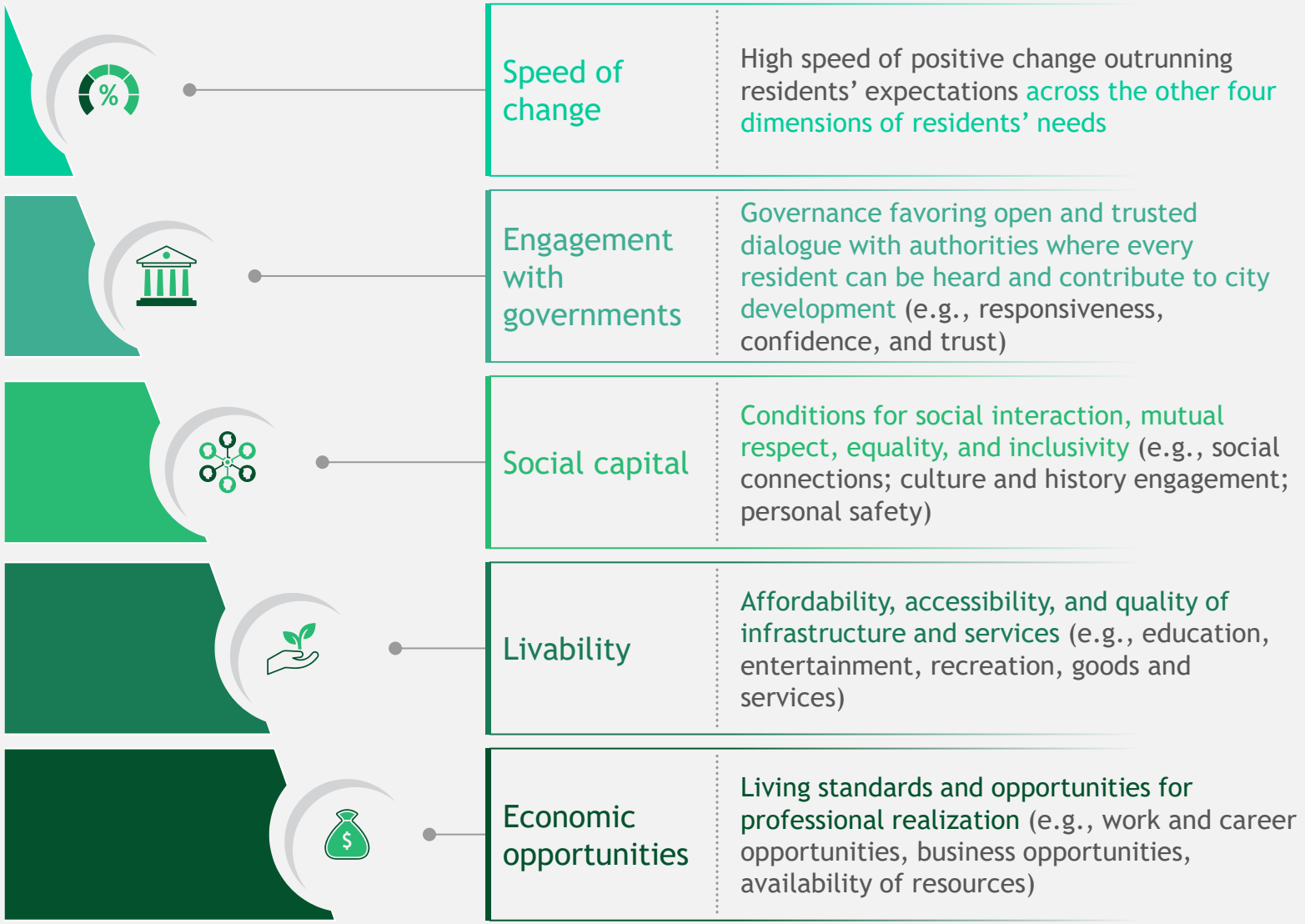

2025–2026

**Deep dives**

- Housing affordability
- Longevity in the city
- Online adepts
- New AI and robotics wave and cities' labor market
- Connected cities

# BCG's *Cities of Choice 4.0* assesses cities across five dimensions of resident value proposition

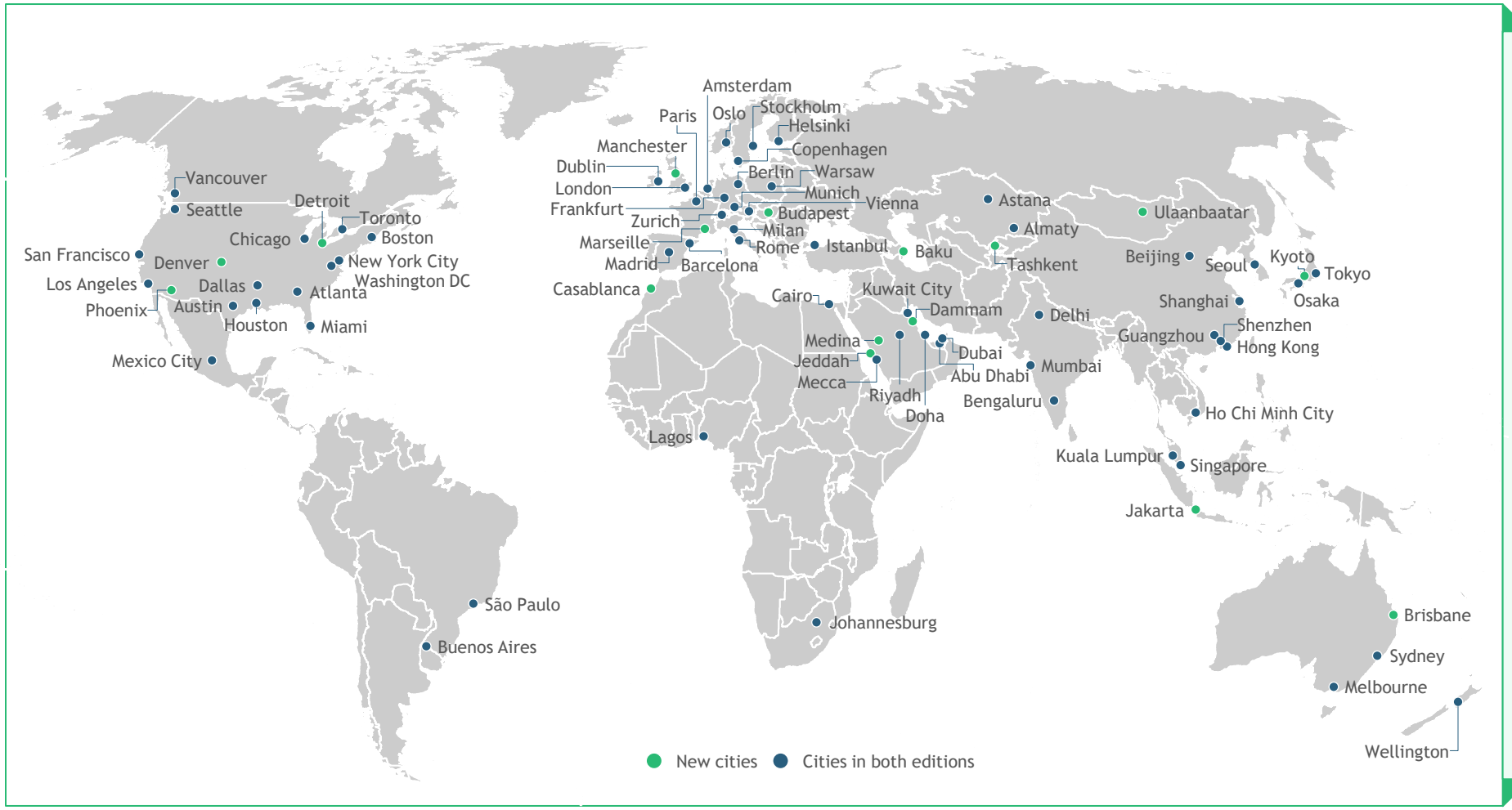
- 80 cities
- 200+ indicators
- 80% objective data
- 20% of data from survey of 24,000 residents
- 10 years longitudinal data
- 5+ million data points



# This edition also assesses 26 elements across five dimensions

| Economic opportunities | Livability | Social capital | Engagement with governments | Speed of change |
|---|---|---|---|---|
| Opportunities for work, career, and earnings | Housing | Social connections | Ability to influence events | Speed of change in economic opportunities |
| Equality income | Mobility | Inclusivity and equality | Government services | Speed of change in livability |
| Opportunities for business | Medical care | Identity with culture and history | Business environment | Speed of change in social capital |
| Availability of personal loans | Education and development | Safety | | Speed of change in engagement with governments |
| | Public spaces | | | |
| | Consumption of goods and services | | | |
| | Entertainment and recreation | | | |
| | Ecology | | | |
| | Cleanliness and hygiene | | | |
| | Comfortable climate | | | |
| | Resilience to emergency situations | | | |

# *Cities of Choice 4.0* covers 80 cities




**80 global cities** included in the ranking, compared with 79 in the last edition (2023)

# Key insight: Speed of change is becoming a winning formula for the future

## 1. Urban competition has shifted from infrastructure to lived outcomes

- Success is no longer measured by assets (roads, airports, utilities) but by what they deliver to residents
- Cities compete on time saved, friction reduced, and quality of everyday life
- Focus has moved from technical performance to resident-level value creation

## 2. Value today means surplus time, richer experiences, and investable prosperity

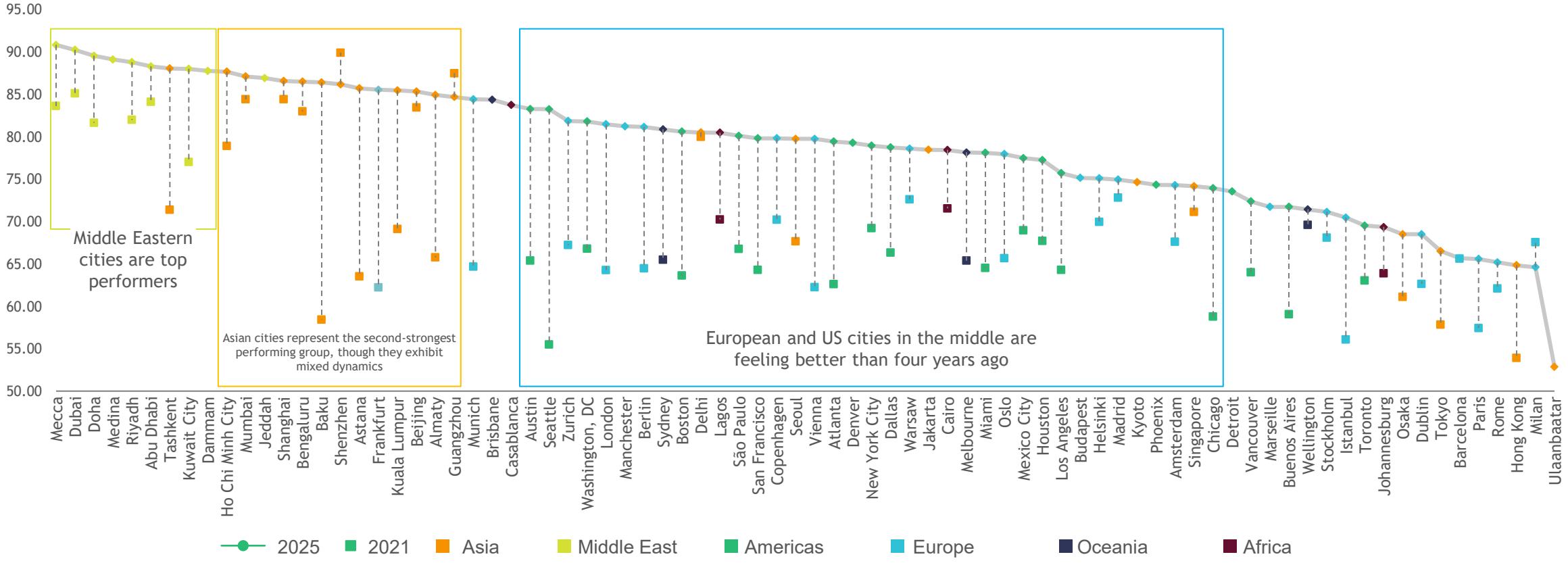
- Mobility = surplus time enabled by smart transport and seamless digital services
- Comfort = depth and variety of life (culture, community, learning, nature, opportunity)
- Prosperity = investable surplus, not just salaries but also real take-home life value after costs

## 3. Speed of change is the new source of sustainable advantage

- Residents compare cities in real time; expectations evolve quickly
- Faster learning and adaptation drives stronger resident advocacy
- High-advocacy cities win by consistently improving outcomes—and proving they can do so again

# Advocacy[1] rises fast in most cities

Leaders remained leaders with increased score. The leading reasons are high speed of change, cultural traditions. Significant increase in advocacy in European cities (potentially post-COVID effect) and, in particular, in Baku, Seattle, Frankfurt, Astana, Munich, Almaty, Austin, and Vienna. Slight drop in Guangzhou, Shenzhen, and Milan

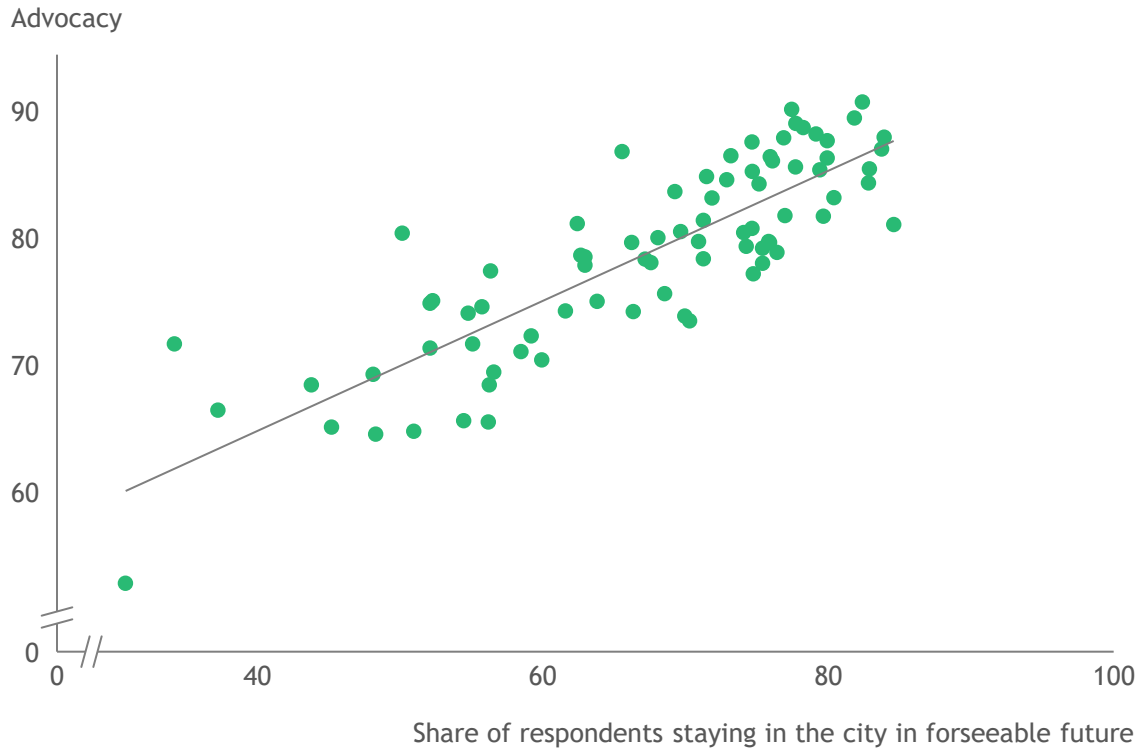



1. Resident advocacy measured with five questions: 1) Are you satisfied to live in [City]? 2) How likely are you to recommend [City] to a friend from another city as a place to live and work? 3) Have you recommended or criticized [City] as a place to live and work in the last 12 months? 4) Do you see your children living in [City] 20 years from now? 5) Do you believe [City] will prosper in the future?

# A high advocacy score indicates residents' commitment to a city

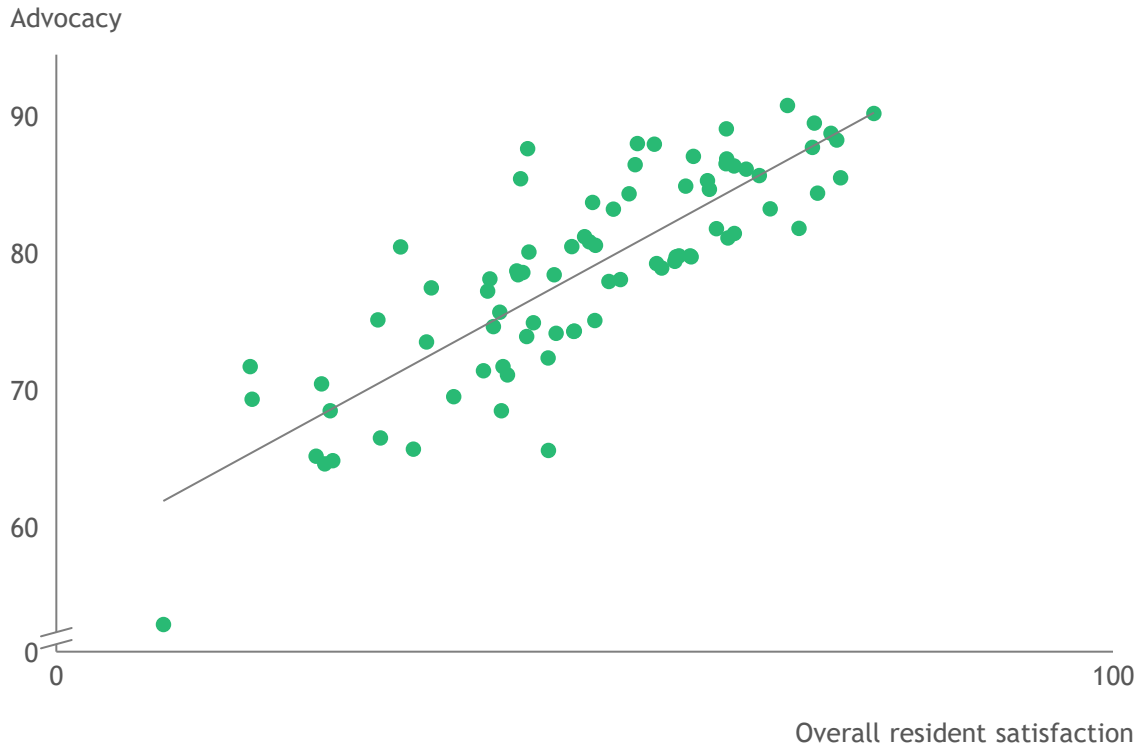
## Cities with higher advocacy also see a greater share of residents planning to stay in the foreseeable future

Advocacy is not just an attitude—it reflects genuine commitment and confidence in a city's long-term prospects, which is a strong foundation for economic and social prosperity.



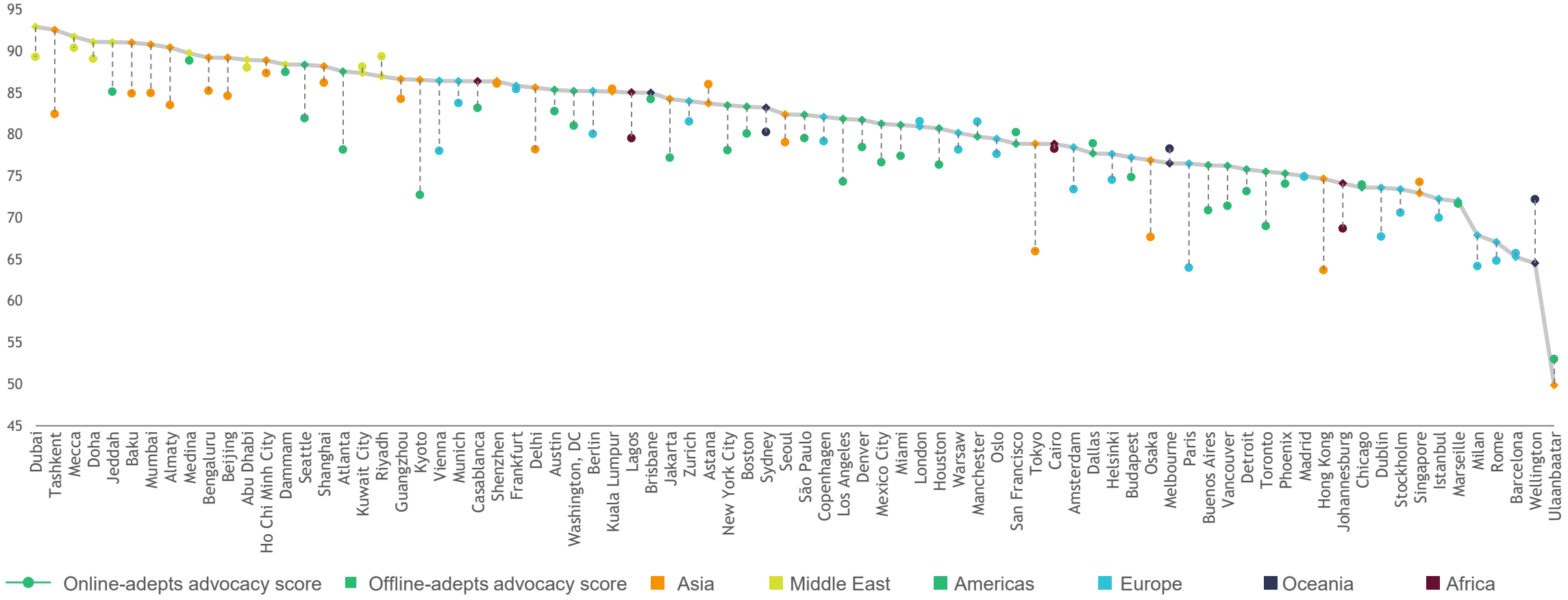

## Higher advocacy aligns closely with higher overall resident satisfaction

Cities that score well on advocacy are those delivering consistently positive everyday experiences; advocacy captures both emotional attachment and quality-of-life outcomes.




1. Share of respondents staying in the city in foreseeable future: measured through share of respondents who selected "No, I plan to stay in [City] in the foreseeable future" to question, "Would you seriously consider relocation to another city / country?" 2. Overall resident satisfaction measured by average score of all opinion-based survey questions.

# Online adepts[1] outperform other residents in advocacy across more than 70 cities




1. Residents who perform at least four of the following activities entirely online, with no more than two activities entirely offline.
Activities include groceries, shopping, health care, fitness, entertainment (films, series, theatre, sports), banking and personal finance (paying bills, sending money, applying for loans, etc.), city government services (utilities, applying for permits and IDs, reporting city issues, voting, etc.).

Section 2

# Top 20 cities by dimension

# Executive summary (I/III)

## Ranking results by dimension

### Overall

- The West leads in economic and livability fundamentals; ME, China, and Central Asia drive the fastest change
- Advocacy and citizen engagement rise across most cities, led by the ME and Asia; Europe and the US show moderate recovery from post-COVID sentiment lows

### Speed of change

- Middle Eastern, Chinese, and Central Asian cities, led by Tashkent, show the fastest transformation over the past decade, especially in livability and economic opportunities
- Europe's pace remains slower, though Zurich and German cities advance through improvements in social capital and engagement with governments
- Top 10 in speed of change in engagement with governments are UAE and KSA cities

### Economic opportunities

- Top 15 led by European and US cities and Dubai; Doha drops on weaker ecosystems and business momentum, while Europe gains; Central Asia improves on reforms sentiment
- Clear income-equality tradeoff: US cities earn more but are more unequal; EU cities are more equal but have lower income
- Not all cities with strong business ecosystems translate them into higher incomes; even efficient performers can lose their income edge if business conditions stagnate
- Business environment is driven by emergence of new coworking spaces (4.5x on average since 2021) and business incubators
- Europe (except Istanbul) gained on new indicators: venture capital investment, airport connectivity, and economic land use score confirming strong fundamentals but also early-stage entrepreneur activity increased
- Sentiment on work and business opportunity availability improved across cities, notably in Central Asia

Note: ME = Middle East; UAE = United Arab Emirates; KSA = Kingdom of Saudi Arabia.

# Executive summary (II/III)

## Ranking results by dimension

Livability

Overall

- Europe retains leadership (London, Zurich, Oslo); Shanghai and Central Asian cities rapidly close the gap
- Developing cities get strongest gains in livability, and if trend continues, talent flow will be redirected strongly to developing cities in search for better living conditions
- Housing affordability and mobility pressures intensify globally; education and health care gains support Europe's lead and Asia's catch-up

Housing: largest challenge across continents

- Higher per square meter prices (+25% in Europe and North America)
- Increased mortgage rates (doubled in Europe and North America, +40% globally)
- Housing drives happiness and already now 62 cities out of 80 develop city-level housing affordability programs

Mobility: situation worsens despite talks about "new mobility"

- Despite public transport initiatives, time to commute has increased by 6% across all cities and growing number of cars (by 7.5% from 2023) is the main contribution
- However, 15-minute city and public transport promotion initiatives start paying off and their adepts are improving (Vienna, Paris)

Outdoor: conditions deteriorate despite physical improvements and high importance for residents

- Air quality deteriorating: over 90% of cities show $NO_2$ levels higher than WHO guidelines; in 80% cities in ME and Asia, the highest PM2.5 and PM10
- Europe and Canada lead globally in public and green spaces, with Europe holding 10 of the top 15 spots; ME lags in green zones; Riyadh, Tashkent, and Warsaw showed strong gains in access to public spaces
- Despite continuous effort in public and green spaces, time outside decreased by 9.2%, while weight of public spaces in residents' needs is high in all cities

Initial traction on health span and longevity capital

- Cities across all groups promote healthy lifestyles (55 cities) and prevention programs; high participation in wellness programs (56%) and telehealth access (80+%); in 80 cities, residents had checkups this year
- Most cities introduced healthy lifestyle programs for older adults (92% participation in wellness programs among elderlies) to be socially and health-wise active and build longevity capital

Consumption

- US and European cities lead in offline retail density, while ME and Asia are very much behind. At the same time, they are leaders in ordering goods online, while US and European cities are outsiders. Accessibility of grocery stores: the first 30 are in Asia, ME, and LA



Note: $NO_2$ = nitrogen dioxide; WHO = World Health Organization; PM = particulate matter; LA = Latin America.

# Executive summary (III/III)

## Ranking results by dimension

### Social capital

- European cities rebound post-COVID, while Asian and Middle Eastern cities continue to lead on social connectedness and resilience
- Inclusivity improves globally, with major gains in developing cities (Almaty, Cairo, Riyadh) and stronger accessibility across transport and employment
- In social capital, cities are "departing" from countries and forming their own "social capital"

### Engagement with governments

- Western cities still lead, but the Middle East is catching up quickly; Dubai enters top 10, while some Western cities (Rome, Milan, Budapest) decline
- Technology penetration drives improvement: +20% feel able to influence decisions; 3x better at solving problems online; 2x more participation apps
- Online adepts demonstrate stronger advocacy than general population; apparently work from home and online convenience create sufficient comfort for people to praise their cities
- Significant improvement in ability to influence events:
  - +20% increase in residents reporting that they feel able to influence decisions in their city
  - 3x improvement in ability to solve the most common city problems using online tools
  - 2x improvement in the availability of dedicated mobile apps that enable citizens to influence city development

# Results by dimension for 80 cities—top 20 cities

## Speed of change

| City | Total dimension score |
|---|---|
| Shenzhen | 92 |
| Riyadh | 91 |
| Tashkent | 88 |
| Doha | 87 |
| Guangzhou | 85 |
| Shanghai | 83 |
| Mecca | 81 |
| Beijing | 81 |
| Jeddah | 80 |
| Mumbai | 80 |
| Dammam | 79 |
| Medina | 77 |
| Astana | 77 |
| Abu Dhabi | 73 |
| Bengaluru | 72 |
| Almaty | 71 |
| Jakarta | 67 |
| Delhi | 64 |
| Kuwait City | 64 |
| Baku | 64 |

## Economic opportunities

| City | Total dimension score |
|---|---|
| London | 81 |
| Zurich | 80 |
| Paris | 80 |
| Atlanta | 79 |
| Dubai | 77 |
| Amsterdam | 76 |
| Frankfurt | 75 |
| San Francisco | 75 |
| Munich | 73 |
| Washington, DC | 72 |
| Austin | 71 |
| Seattle | 71 |
| Dublin | 71 |
| Oslo | 70 |
| New York City | 70 |
| Boston | 69 |
| Seoul | 68 |
| Copenhagen | 66 |
| Denver | 66 |
| Madrid | 66 |

## Livability

| City | Total dimension score |
|---|---|
| Zurich | 74 |
| London | 74 |
| Oslo | 73 |
| Frankfurt | 72 |
| Vienna | 72 |
| Washington, DC | 71 |
| Copenhagen | 70 |
| Sydney | 69 |
| Berlin | 69 |
| Munich | 68 |
| Vancouver | 64 |
| Stockholm | 64 |
| Seattle | 64 |
| Shanghai | 63 |
| Brisbane | 62 |
| Austin | 62 |
| Denver | 61 |
| Dubai | 61 |
| Melbourne | 61 |
| San Francisco | 61 |

## Social capital

| City | Total dimension score |
|---|---|
| Beijing | 78 |
| London | 72 |
| Berlin | 70 |
| Shanghai | 70 |
| Copenhagen | 70 |
| Vienna | 67 |
| Shenzhen | 65 |
| Doha | 64 |
| Sydney | 64 |
| Amsterdam | 63 |
| Stockholm | 62 |
| Dubai | 62 |
| Paris | 61 |
| Seoul | 61 |
| Munich | 60 |
| New York City | 60 |
| Helsinki | 59 |
| Zurich | 59 |
| Madrid | 59 |
| Manchester | 58 |

## Engagement with governments

| City | Total dimension score |
|---|---|
| Frankfurt | 80 |
| Zurich | 79 |
| Munich | 77 |
| Austin | 77 |
| San Francisco | 75 |
| Riyadh | 75 |
| London | 74 |
| Atlanta | 73 |
| Dubai | 72 |
| Washington, DC | 71 |
| Abu Dhabi | 70 |
| Singapore | 70 |
| Miami | 69 |
| Denver | 69 |
| New York City | 67 |
| Seoul | 67 |
| Berlin | 67 |
| Mecca | 66 |
| Copenhagen | 66 |
| Dammam | 66 |

# Speed of change, 2014–2024—top 20 cities

| Rank | City | Total dimension score | SoC in economic opportunities | SoC in livability | SoC in social capital | SoC in engagement with governments |
|---|---|---|---|---|---|---|
| 1 | Shenzhen | 92 | 86 | 100 | 100 | 90 |
| 2 | Riyadh | 91 | 84 | 100 | 81 | 100 |
| 3 | Tashkent | 88 | 97 | 51 | 84 | 95 |
| 4 | Doha | 87 | 82 | 88 | 100 | 84 |
| 5 | Guangzhou | 85 | 78 | 80 | 100 | 86 |
| 6 | Shanghai | 83 | 78 | 73 | 99 | 84 |
| 7 | Mecca | 81 | 77 | 67 | 76 | 96 |
| 8 | Beijing | 81 | 63 | 99 | 100 | 84 |
| 9 | Jeddah | 80 | 73 | 82 | 74 | 92 |
| 10 | Mumbai | 80 | 66 | 100 | 87 | 82 |
| 11 | Dammam | 79 | 67 | 72 | 79 | 96 |
| 12 | Medina | 77 | 68 | 68 | 76 | 91 |
| 13 | Astana | 77 | 67 | 83 | 92 | 76 |
| 14 | Abu Dhabi | 73 | 65 | 83 | 61 | 87 |
| 15 | Bengaluru | 72 | 63 | 78 | 83 | 75 |
| 16 | Almaty | 71 | 57 | 99 | 86 | 65 |
| 17 | Jakarta | 67 | 60 | 76 | 69 | 70 |
| 18 | Delhi | 64 | 51 | 74 | 75 | 70 |
| 19 | Kuwait City | 64 | 37 | 90 | 76 | 77 |
| 20 | Baku | 64 | 49 | 83 | 68 | 70 |

1st quintile 2nd quintile 3rd quintile 4th quintile 5th quintile

Note: SoC = speed of change.

## Key outcomes

- Top 10 is dominated by ME and Chinese cities, reflecting the fast pace of the comprehensive changes the cities have been pursuing
- Although the speed of change is slow in Europe in general, Zurich and German cities gained significantly due to improvements in social capital and engagement with governments

### SoC in economic opportunities

- Middle East and US cities are leading with Tashkent on top
- Top 10 cities witnessed real annual income growth of average 3%, negative growth in unemployment rates of on average 5%
- The biggest declines in score happened to Canadian cities, where real wages decreased and inequality slightly increased

### SoC in livability

- Asia and ME are leading as before, Lagos gained significantly due to new metro opening and relatively better performance in housing
- In North America, cities' scores declined because of significant jump in mortgage rates and impact on household income growth

### SoC in social capital

- Biggest gains are with German cities along with Central Asian and ME due to improvements in reported safety and tolerance in the society
- At the same time, Europe and United States report in increased growth of crime and murder

### SoC in engagement with governments

- Top 10 is dominated by KSA and UAE cities due to their improved sentiment toward the government services and trust in authorities
- The sentiment is confirmed by the growth in the E-Government Development Index (EGDI)

# Economic opportunities—top 20 cities

| City | Total dimension score | Opportunities for work and income | Business opportunities | Equality of income | Availability of personal loans |
|---|---|---|---|---|---|
| London | 81 | 81 | 97 | 68 | 60 |
| Zurich | 80 | 89 | 72 | 70 | 77 |
| Paris | 80 | 95 | 76 | 70 | 61 |
| Atlanta | 79 | 89 | 95 | 30 | 56 |
| Dubai | 77 | 82 | 86 | 45 | 77 |
| Amsterdam | 76 | 74 | 82 | 83 | 69 |
| Frankfurt | 75 | 63 | 75 | 81 | 100 |
| San Francisco | 75 | 81 | 100 | 29 | 50 |
| Munich | 73 | 63 | 67 | 88 | 94 |
| Washington | 72 | 88 | 79 | 45 | 39 |
| Austin | 71 | 88 | 67 | 33 | 58 |
| Seattle | 71 | 86 | 74 | 38 | 53 |
| Dublin | 71 | 80 | 65 | 51 | 75 |
| Oslo | 70 | 81 | 49 | 61 | 78 |
| New York City | 70 | 79 | 93 | 20 | 41 |
| Boston | 69 | 82 | 86 | 31 | 40 |
| Seoul | 68 | 69 | 58 | 75 | 77 |
| Copenhagen | 66 | 70 | 53 | 51 | 86 |
| Denver | 66 | 74 | 78 | 36 | 49 |
| Madrid | 66 | 64 | 59 | 73 | 73 |

Note: Ranks are compiled using 2024 data, thus, might not reflect the latest trends and media focus.
1. Surveys: I see opportunities for self-realization and opportunities for work. 2. Survey: I see many opportunities to open my business. 3. Total early-stage Entrepreneurial Activity Rate.

## Key outcomes

- Overall: Top 15 led by European and US cities and Dubai; income inequality clear gap for most cities leading economic opportunity

### Opportunities for work, career, and income

- US still leads, with three European leaders (Paris, Zurich, and Oslo); Dubai joins top 10
- Sentiment[1] improves compared to COVID levels, but overall scores still decline in Asia, parts of Europe and North America

### Business opportunities for residents

- Clear lead of North America and Europe, vs. more diversified mix previously
- Europe (except Istanbul) gained on new indicators: VC investment, airport connectivity, and economic land-use score, confirming strong fundamentals but also overall sentiment and TEA increased
- Sentiment on work and business opportunity availability improved across cities, notably in Central Asia

### Equality of income

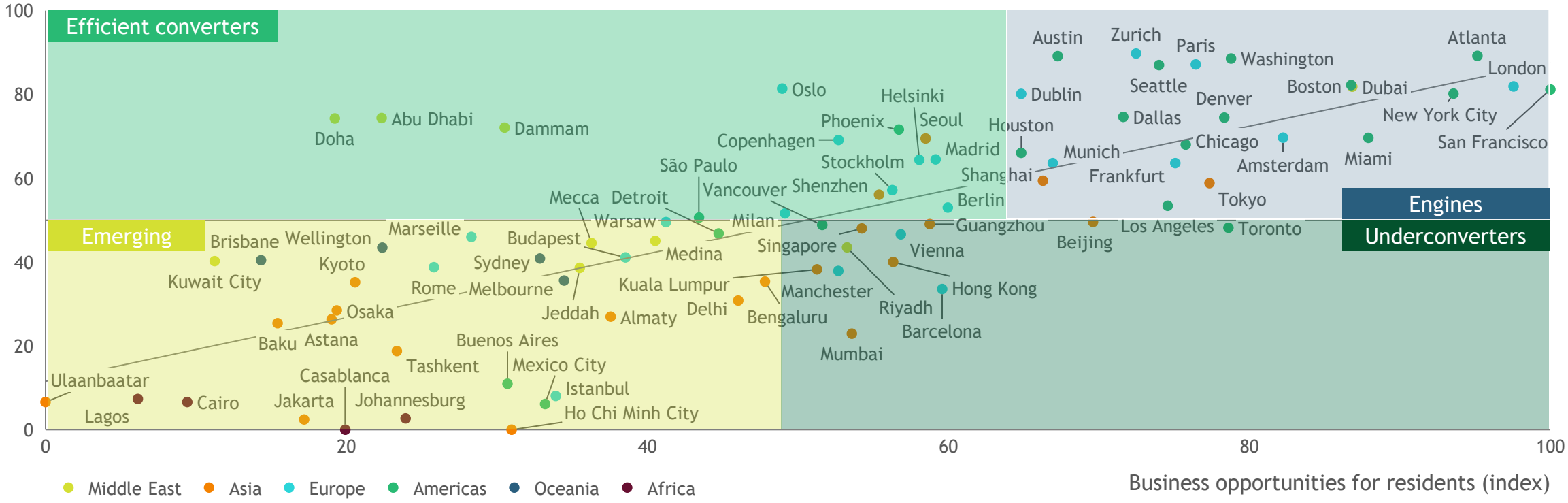
- Europe leads; German cities show strong gains
- US cities improved but still rank more unequal; bottom 15 remains dominated by US and Chinese cities

### Availability of personal loans

- Top 10 remains dominated by German and Chinese cities
- Sentiment[1] improved despite rising borrowing costs, especially in Central Asia

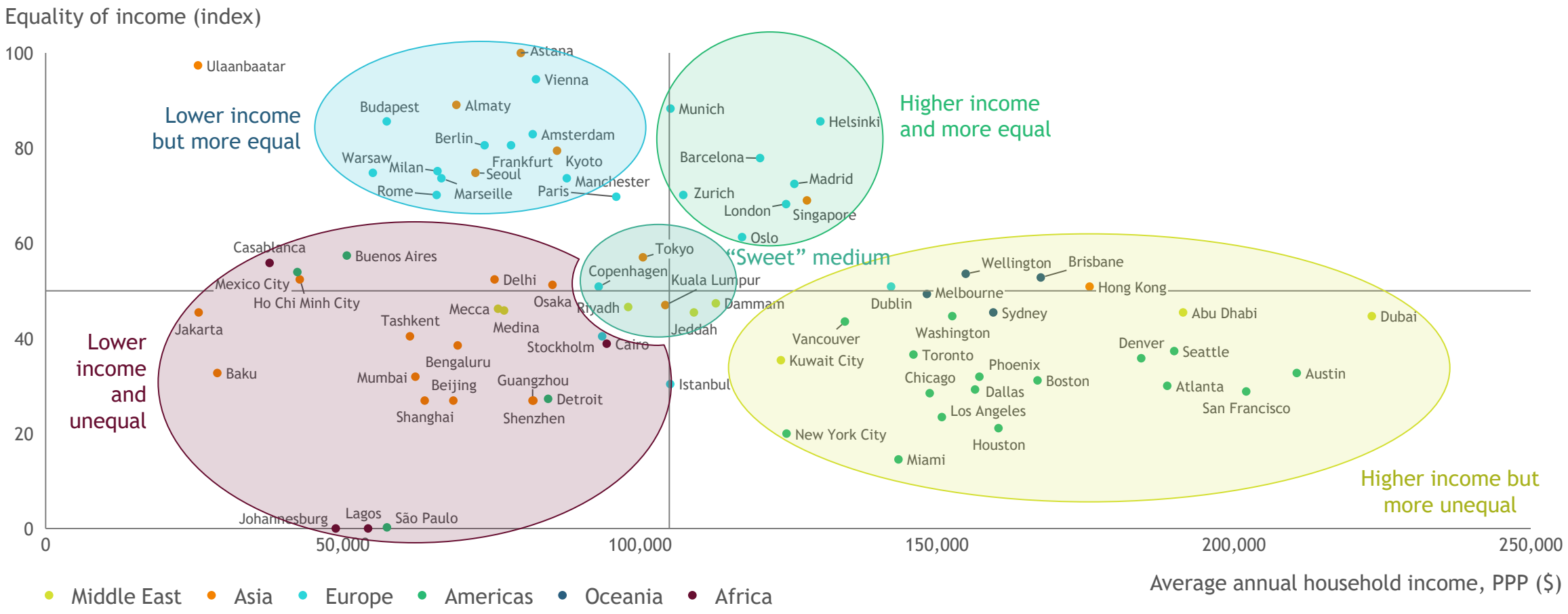
# Economic opportunities | Efficient converters adjust their business opportunities and turn them into incomes

## Opportunities for work, career, and income (index)




Note: Opportunities for work and income index measures unemployment; real HH income; food share; GDP (PPP)/worker; surveys (opportunities, self-realization); WFH split/infrastructure; internet speed; business opportunities index measures business opportunities survey; TEA rate; services in GDP%; number of startups; coworking situations, new patents, VC investment; AI-vulnerability survey; land use; retail vacancy, airport connectivity.

# Economic opportunities | US cities earn more but have higher inequality, while European cities are more equal but earn less—an income-equality paradox




Note: PPP = purchasing power parity.

# Livability—top 20 cities

| City | Total dimension score | Housing | Mobility | Health care | Education | Consumption of goods and services | Public spaces | Entertainment and recreation | Ecology | Comfortable climate | Cleanliness and hygiene | Resilience to emergency situations |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Zurich | 74 | 66 | 80 | 87 | 58 | 52 | 100 | 82 | 64 | 51 | 96 | 62 |
| London | 74 | 65 | 71 | 69 | 100 | 97 | 79 | 100 | 61 | 49 | 61 | 58 |
| Oslo | 73 | 67 | 100 | 94 | 72 | 56 | 88 | 60 | 92 | 34 | 45 | 77 |
| Frankfurt | 72 | 81 | 92 | 100 | 70 | 73 | 74 | 68 | 57 | 39 | 73 | 78 |
| Vienna | 72 | 59 | 98 | 66 | 64 | 65 | 85 | 75 | 82 | 41 | 67 | 72 |
| Washington | 71 | 86 | 61 | 51 | 70 | 99 | 61 | 100 | 59 | 44 | 64 | 91 |
| Copenhagen | 70 | 60 | 87 | 78 | 79 | 80 | 61 | 76 | 89 | 41 | 67 | 55 |
| Sydney | 69 | 63 | 57 | 57 | 51 | 65 | 68 | 55 | 79 | 97 | 71 | 75 |
| Berlin | 69 | 51 | 95 | 97 | 83 | 60 | 69 | 73 | 66 | 53 | 59 | 70 |
| Munich | 68 | 71 | 97 | 100 | 87 | 65 | 46 | 58 | 63 | 44 | 77 | 84 |
| Vancouver | 64 | 44 | 62 | 26 | 59 | 78 | 74 | 46 | 100 | 49 | 55 | 74 |
| Stockholm | 64 | 42 | 78 | 30 | 50 | 60 | 100 | 48 | 83 | 36 | 53 | 74 |
| Seattle | 64 | 81 | 71 | 60 | 68 | 80 | 33 | 65 | 91 | 50 | 60 | 62 |
| Shanghai | 63 | 47 | 67 | 82 | 71 | 74 | 74 | 51 | 30 | 42 | 72 | 78 |
| Brisbane | 62 | 71 | 55 | 62 | 55 | 39 | 64 | 49 | 70 | 70 | 77 | 78 |
| Austin | 62 | 94 | 49 | 38 | 66 | 54 | 67 | 55 | 77 | 52 | 65 | 49 |
| Denver | 61 | 87 | 50 | 58 | 66 | 56 | 54 | 61 | 63 | 52 | 62 | 77 |
| Dubai | 61 | 89 | 47 | 85 | 21 | 78 | 60 | 50 | 32 | 33 | 86 | 86 |
| Melbourne | 61 | 56 | 38 | 56 | 62 | 49 | 73 | 58 | 83 | 70 | 42 | 81 |
| San Francisco | 61 | 72 | 53 | 55 | 64 | 65 | 25 | 89 | 89 | 89 | 63 | 53 |

## Key outcomes

- As in legacy editions, Europe leads livability, with London and Zurich at the top; Washington has maintained its position, but NYC and San Franscico have lost their historical leadership; Chinese cities catching up very fast, with leader Shanghai in 14th place
- Housing: Total relative decline of all cities, prices per square meter and mortgage rocket, US cities continue to lead due to historically large space per person
- Mobility: Post-COVID mobility intensified; overall time to commute has increased also showing growing number of cars
- Health care: German cities lead, while US cities are mostly at the end of the list
- Education: Dimension was significantly expanded by including after-school activities and higher education, benefiting European cities and the cities with tradition of after-school programs
- Consumption: US and European cities lead in offline big format retail density, while ME and Asia lead online delivery and next-door format
- Public spaces: Europe and Canada lead globally, with Europe holding 10 of the top 15 spots; ME lags in green zones but Riyadh showed strong gains
- Entertainment: Stable with traditional leaders: US and Europe
- Ecology: NAMR, Europe, and AUS are on top as before; in ME, sustainability commitment improved; half of cities report less than one-third of HH waste recycled; air quality deteriorating compared with COVID time
- Cleanliness: Zurich on top as before; Asian cities improved due to public toilet revolution
- Resilience: Washington DC on top with Dubai following; all NA cities improved due to the gains in intensive care beds and emergency personnel

# Social capital—top 20 cities

| City | Total dimension score | Social connections | Identity with culture | Inclusivity | Safety |
|---|---|---|---|---|---|
| Beijing | 78 | 77 | 100 | 55 | 85 |
| London | 72 | 64 | 100 | 70 | 45 |
| Berlin | 70 | 59 | 100 | 75 | 31 |
| Shanghai | 70 | 85 | 69 | 48 | 97 |
| Copenhagen | 70 | 67 | 63 | 83 | 59 |
| Vienna | 67 | 51 | 74 | 82 | 45 |
| Shenzhen | 65 | 79 | 48 | 51 | 100 |
| Doha | 64 | 71 | 52 | 55 | 92 |
| Sydney | 64 | 60 | 57 | 80 | 49 |
| Amsterdam | 63 | 47 | 59 | 91 | 33 |
| Stockholm | 62 | 12 | 53 | 92 | 50 |
| Dubai | 62 | 95 | 59 | 26 | 100 |
| Paris | 61 | 17 | 100 | 56 | 35 |
| Seoul | 61 | 31 | 85 | 53 | 68 |
| Munich | 60 | 61 | 39 | 78 | 58 |
| New York City | 60 | 49 | 100 | 44 | 42 |
| Helsinki | 59 | 41 | 41 | 83 | 59 |
| Zurich | 59 | 61 | 43 | 75 | 57 |
| Madrid | 59 | 39 | 71 | 62 | 46 |
| Manchester | 58 | 61 | 32 | 79 | 57 |

## Key outcomes

- Overall ranking: In 2023, the top 10 were dominated by Asian and ME cities (the highest Western city, New York, ranked 13th); this year, 5 of the top 10 are European, driven largely by stronger survey results, as residents' subjective views improved significantly post-COVID
- Social connections: Asian and ME cities remain as leaders
- Identity with culture: Residents today feel more proud of their cities' history and culture, with notable increases in Zurich, German cities, and Jeddah; however, many European cities saw declines, including Barcelona, Stockholm, and Amsterdam
- Inclusivity: Cities are becoming more inclusive in both infrastructure (public transport use rose from 76% to 81%) and practices (employment of people with disabilities grew from 36% to 38%)
- Safety: As historically, the safest cities are in the Middle East and Asia, while the least safe are in North and South America

# Engagement with governments—top 20 cities

| City | Total dimension score | Ability to influence events | Government services | Business environment |
|---|---|---|---|---|
| Frankfurt | 80 | 90 | 75 | 77 |
| Zurich | 79 | 73 | 81 | 84 |
| Munich | 77 | 71 | 75 | 83 |
| Austin | 77 | 83 | 59 | 86 |
| San Francisco | 75 | 75 | 52 | 94 |
| Riyadh | 75 | 65 | 100 | 65 |
| London | 74 | 83 | 72 | 68 |
| Atlanta | 73 | 82 | 47 | 88 |
| Dubai | 72 | 47 | 100 | 69 |
| Washington | 71 | 88 | 53 | 74 |
| Abu Dhabi | 70 | 62 | 85 | 63 |
| Singapore | 70 | 68 | 69 | 72 |
| Miami | 69 | 73 | 38 | 87 |
| Denver | 69 | 76 | 48 | 80 |
| New York City | 67 | 77 | 70 | 58 |
| Seoul | 67 | 87 | 84 | 40 |
| Berlin | 67 | 56 | 82 | 61 |
| Mecca | 66 | 49 | 89 | 62 |
| Copenhagen | 66 | 56 | 76 | 65 |
| Dammam | 66 | 57 | 86 | 57 |

## Key outcomes

Technology penetration drives significant improvement in ability to influence events and government services:

- +20% increase in residents reporting that they feel able to influence decisions in their city
- 3x improvement in ability to solve the most common city problems using online tools
- 2x improvement in the availability of dedicated mobile apps that enable citizens to influence city development
- Many developing cities have improved their rankings: Riyadh (EGDI improved from 0.49 to 0.92) and Dubai entered the top 10; São Paulo and Almaty are in the top 25
- Western cities still lead, but ME is catching up quickly with Dubai in top 10, and some cities from the West are becoming laggards, e.g., Rome, Milan, Budapest
- Business environment is driven by emergence of new coworking spaces (4.5x on average since 2021) and business incubators

# Prosperous middleweights lead on infrastructure, while established powerhouses lag despite large investments but lead on soft infrastructure

Comparison by group

| | Physical infrastructure |
|---|---|
| 1 | Oslo |
| 2 | Zurich |
| 3 | Washington |
| 4 | Frankfurt |
| 5 | Warsaw |
| 6 | Stockholm |
| 7 | Vienna |
| 8 | Munich |
| 9 | Helsinki |
| 10 | Miami |
| 11 | London |
| 12 | Seoul |
| 13 | Singapore |
| 14 | Amsterdam |
| 15 | Wellington |
| 16 | Copenhagen |
| 17 | Budapest |
| 18 | Vancouver |
| 19 | Paris |
| 20 | Madrid |

| | Soft infrastructure and services |
|---|---|
| 1 | London |
| 2 | Paris |
| 3 | Barcelona |
| 4 | São Paulo |
| 5 | Kyoto |
| 6 | Ho Chi Minh City |
| 7 | Rome |
| 8 | Tokyo |
| 9 | New York City |
| 10 | Shanghai |
| 11 | Copenhagen |
| 12 | Madrid |
| 13 | Casablanca |
| 14 | Manchester |
| 15 | Lagos |
| 16 | Astana |
| 17 | Seattle |
| 18 | Mexico City |
| 19 | Baku |
| 20 | Milan |

| | Regulatory capital[1] |
|---|---|
| 1 | Copenhagen |
| 2 | Dallas |
| 3 | Ho Chi Minh City |
| 4 | Buenos Aires |
| 5 | Miami |
| 6 | Shenzhen |
| 7 | Beijing |
| 8 | Shanghai |
| 9 | Manchester |
| 10 | Zurich |
| 11 | Paris |
| 12 | Almaty |
| 13 | Helsinki |
| 14 | Milan |
| 15 | Guangzhou |
| 16 | Sydney |
| 17 | Boston |
| 18 | Medina |
| 19 | Los Angeles |
| 20 | Denver |

## Key insights

- Paris and Copenhagen are the only two cities appearing in top 20 across all three dimensions
- Prosperous middleweights lead on physical infrastructure development, while established powerhouses and global hubs lag behind despite large capital spending
- But established powerhouses followed by established global hubs lead on soft infrastructure, suggesting services and digital experiences are easier to improve in large cities with economies of scale
- The pillars are weakly correlated—pointing to the fact that cities can perform differently in hard, soft infrastructure and programs
- Four cities—Ulaanbaatar, Cairo, Bengaluru, and Mecca—lag across all three pillars, indicating a foundational gap where basic infrastructure and program delivery need to be built in tandem

Established powerhouses | Developing megacities | Established global hubs | Prosperous middleweights | Developing middleweights

1. Regulatory capital includes programs and policies.
Note: Calculation methodology used three new subindices calculated by regrouping the physical infrastructure, soft infrastructure, and regulatory capital-related indicators across all dimensions.

Section 3

# Ranking by groups

# In addition to ranking by dimension, cities are grouped by socioeconomic profiles to ensure comparability

## 1 Established powerhouses

1. Cities with more than $25,000 GDP per capita
2. Urban area population >10M people

- Beijing
- London
- Los Angeles
- New York City
- Osaka
- Paris
- Seoul
- Shanghai
- Shenzhen
- Tokyo

## 2 Developing megacities

1. Cities with less than $25,000 GDP per capita
2. Urban area population >10M people

- Bengaluru
- Buenos Aires
- Cairo
- Delhi
- Guangzhou
- Ho Chi Minh City
- Istanbul
- Jakarta
- Johannesburg
- Lagos
- Mexico City
- Mumbai
- São Paulo

## 3 Established global hubs

1. Cities with more than $25,000 GDP per capita
2. Urban area population 4M–10M people

- Atlanta
- Barcelona
- Berlin
- Boston
- Chicago
- Dallas
- Detroit
- Dubai
- Hong Kong
- Houston
- Jeddah
- Kuala Lumpur
- Madrid
- Melbourne
- Miami
- Milan
- Phoenix
- Riyadh
- San Francisco
- Seattle
- Singapore
- Sydney
- Toronto
- Washington

## 4 Prosperous middleweights

1. Cities with more than $25,000 GDP per capita
2. Urban area population <4M people

- Abu Dhabi
- Amsterdam
- Austin
- Brisbane
- Budapest
- Copenhagen
- Denver
- Doha
- Dublin
- Frankfurt
- Helsinki
- Kuwait City
- Kyoto
- Manchester
- Marseille
- Munich
- Oslo
- Rome
- Stockholm
- Vancouver
- Vienna
- Warsaw
- Wellington
- Zurich

## 5 Developing middleweights

1. Cities with less than $25,000 GDP per capita
2. Urban area population <4M people

- Almaty
- Astana
- Baku
- Casablanca[1]
- Dammam
- Mecca
- Medina
- Tashkent
- Ulaanbaatar

1. Casablanca has urban population of 4.5M. Note: There is no other city between 4M-10M with less than $25,000 GDP per capita in our sample.
Source: Oxford Economics; World Bank; various official government websites.

# Executive summary

## Ranking results by group

### Overall

- Livability and economic opportunities remain the strongest global performance drivers
- Speed of change differentiates high-performing cities—especially in China and ME—highlighting agility as a growing success factor

### Established powerhouses

- London leads globally with balanced excellence across dimensions, though lacking in speed of change
- Chinese cities (Shanghai, Beijing, Shenzhen) outperform on social capital, speed of change, and advocacy, but lag in livability fundamentals
- US and European peers show strong economic opportunities but face limits in social capital and speed of change

### Developing megacities

- The group is characterized by mostly below-average scores across dimensions but notably high advocacy, reflecting strong citizen engagement despite structural weaknesses
- Guangzhou tops the group for excelling in all dimensions, companied with high advocacy
- High speed of change score seen in India and Southeast Asia, though still constrained by fundamentals

### Established global hubs

- Group characterized by maturity and stability, with strong advocacy but modest speed of change
- Berlin leads as the most balanced performer; Dubai, Washington, and San Francisco follow closely
- US and ME cities excel in economic opportunities and engagement with governments

### Prosperous middleweights

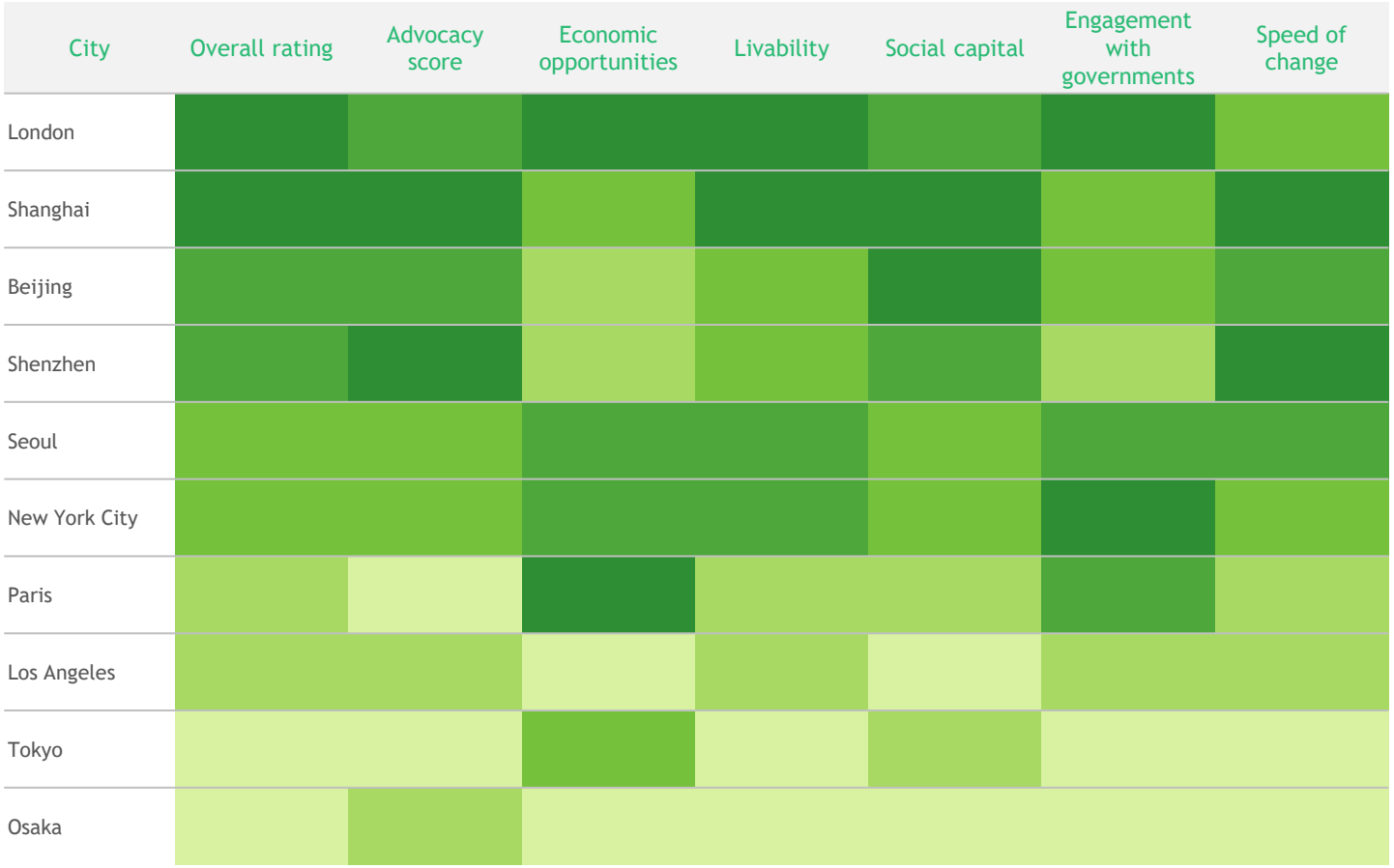
- Zurich, Frankfurt, and Munich top the group, excelling in economic opportunities and engagement with governments
- European cities dominate, though some laggards (e.g., Marseille, Rome) pull down group averages
- Doha stands out with the highest speed of change, signaling emerging regional momentum

### Developing middleweights

- The group overall has strong advocacy and speed of change but with lacking capability—high citizen alignment and change intent without current supporting economic or social foundations
- Dammam leads the group with balanced performance across all dimensions

# Ranking by group: established powerhouses[1]

Cities with more than $25,000 GDP per capita and urban area population of over 10M



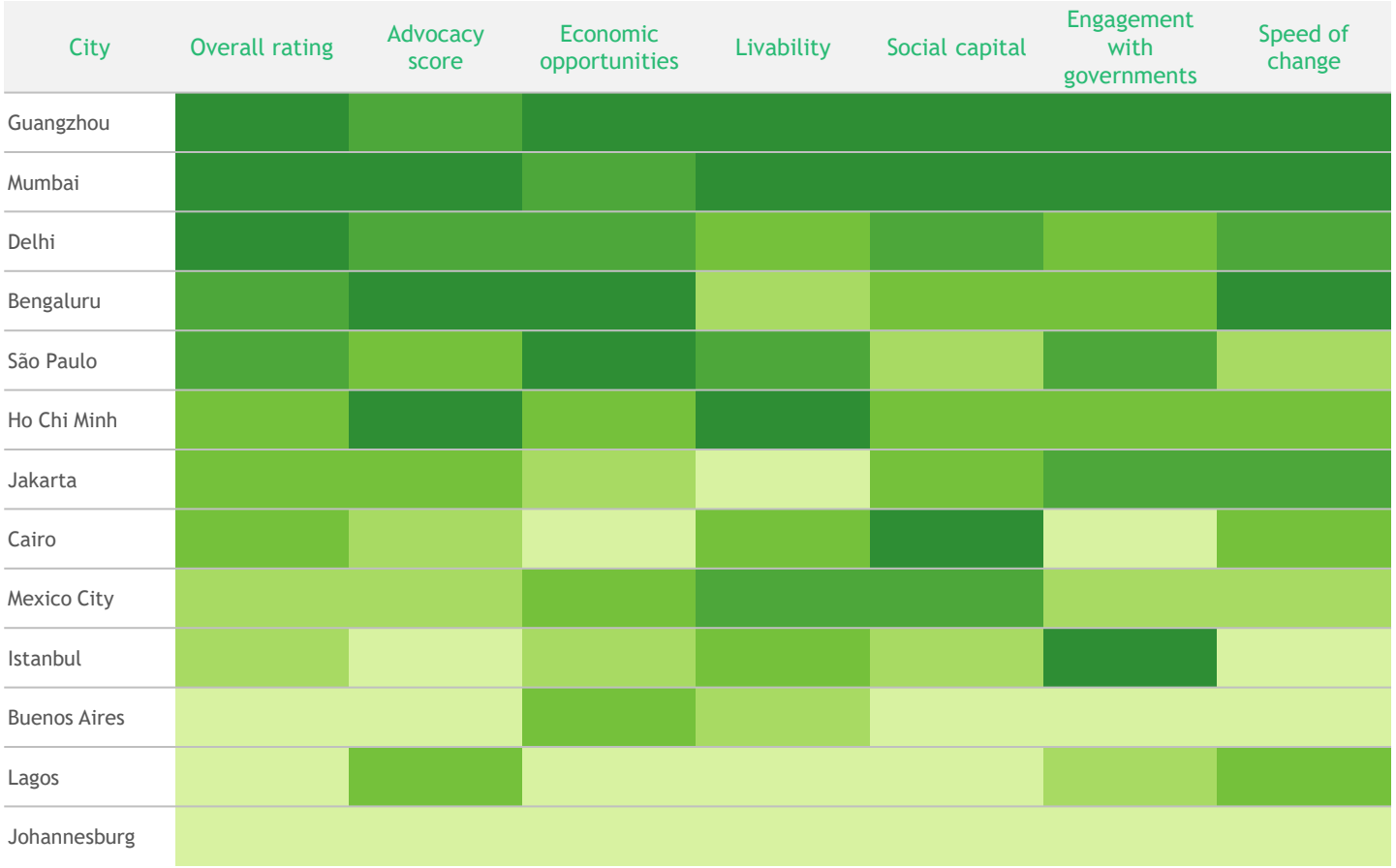

1. Named “megacenters” in the 2023 ranking and consisted of 14 cities, including all the cities listed in this group.
Note on subdimensions: Economic opportunities: opportunities for work, career, and income, opportunities for business, equality of income, availability of personal loans. Livability: ability to influence events, government services, business environment, cleanliness and hygiene, comfortable climate, consumption of goods and services, ecology, education and development, entertainment and recreation, health care, housing, mobility, public spaces, resilience to emergency situations. Social capital: inclusivity and equality, identity with culture and history, safety, social connections. Speed of change: speed of change in economic opportunities, speed of change in engagement with governments, speed of change in livability, speed of change in social capital.

## Key outcomes

- Across all groups, livability and economic opportunities are the strongest drivers of overall performance, followed by engagement with governments
- London ranks first, combining strong economic opportunities with high livability—the only city performing well across both; it has the highest scores in education, consumption, and entertainment
- Chinese cities win due to high speed of change, social capital, and very high advocacy, but still lag on fundamentals
- Paris is strong on culture and consumption, but weaker housing, mobility, and hygiene limit its livability
- Within the US, NYC leads over LA in economic opportunities, stemming from better performance in the innovation ecosystem, workforce efficiency, business development, and sentiment about economic and business opportunities
- Structural difference within the group comes from Japanese cities, which score low across all pillars, pulling down the group average

# Ranking by group: developing megacities

Cities with less than $25,000 GDP per capita and urban area population of over 10M



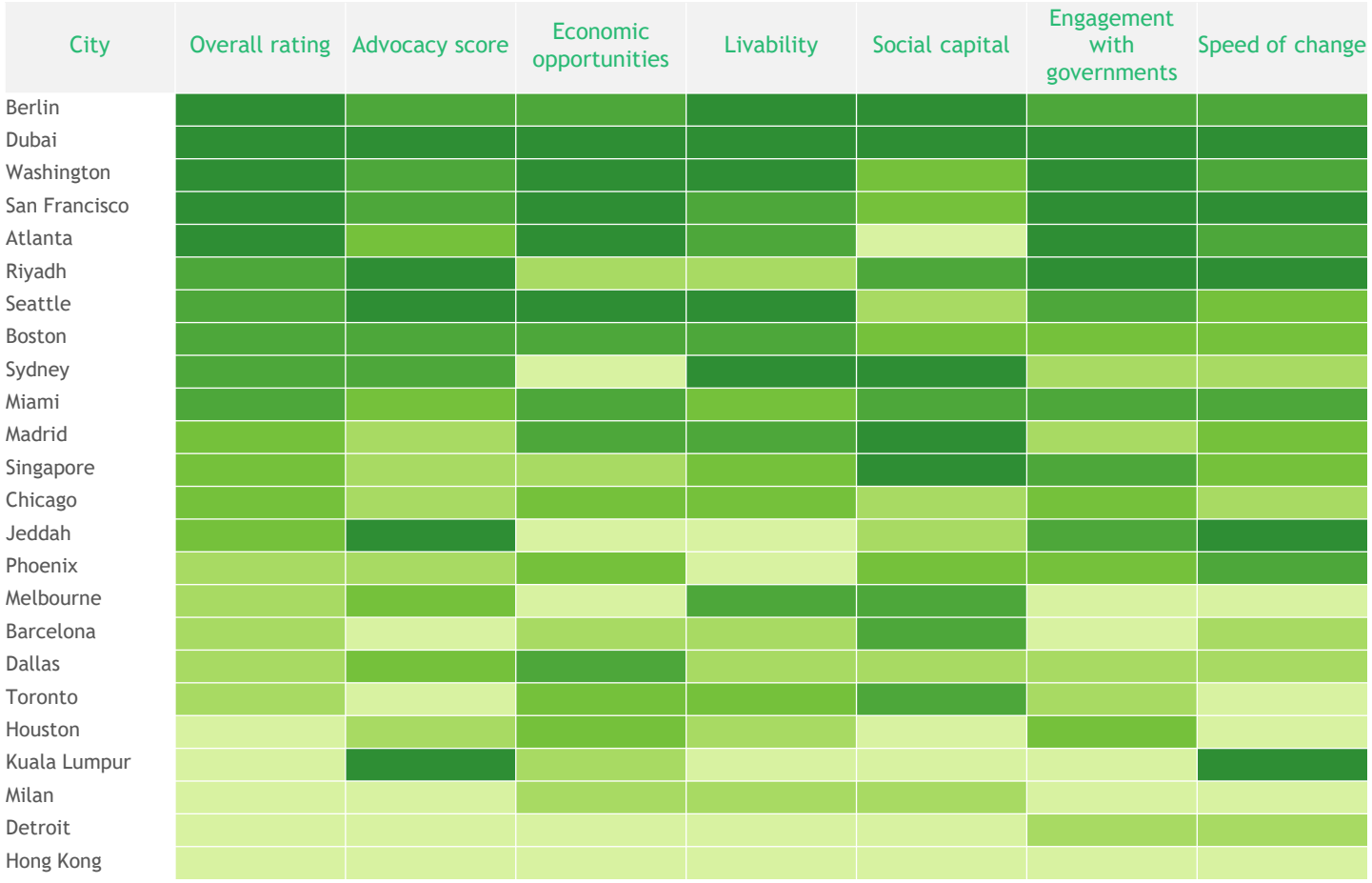

Note on subdimensions: Economic opportunities: opportunities for work, career, and income, opportunities for business, equality of income, availability of personal loans. Livability: ability to influence events, government services, business environment, cleanliness and hygiene, comfortable climate, consumption of goods and services, ecology, education and development, entertainment and recreation, health care, housing, mobility, public spaces, resilience to emergency situations. Social capital: inclusivity and equality, identity with culture and history, safety, social connections. Speed of change: speed of change in economic opportunities, speed of change in engagement with governments, speed of change in livability, speed of change in social capital.

## Key outcomes

- The group is characterized by mostly below-average scores across dimensions, but notably high advocacy, reflecting strong citizen engagement despite structural weaknesses, especially noticeable in Ho Chi Minh City and Lagos
- Guangzhou leads the group as the most balanced city, combining the above-average fundamentals with high speed of change and high advocacy
- The group's overall low performance in livability stems from weak infrastructure fundamentals, except Guangzhou, which leads in cleanliness and public spaces
- Istanbul scores low due to weak livability performance across 5 out of 11 subdimensions and also weak in opportunities for work, career, and income coming from high unemployment rates and low sentiment

# Ranking by group: established global hubs

Cities with more than $25,000 GDP per capita and urban area population of 4M to 10M

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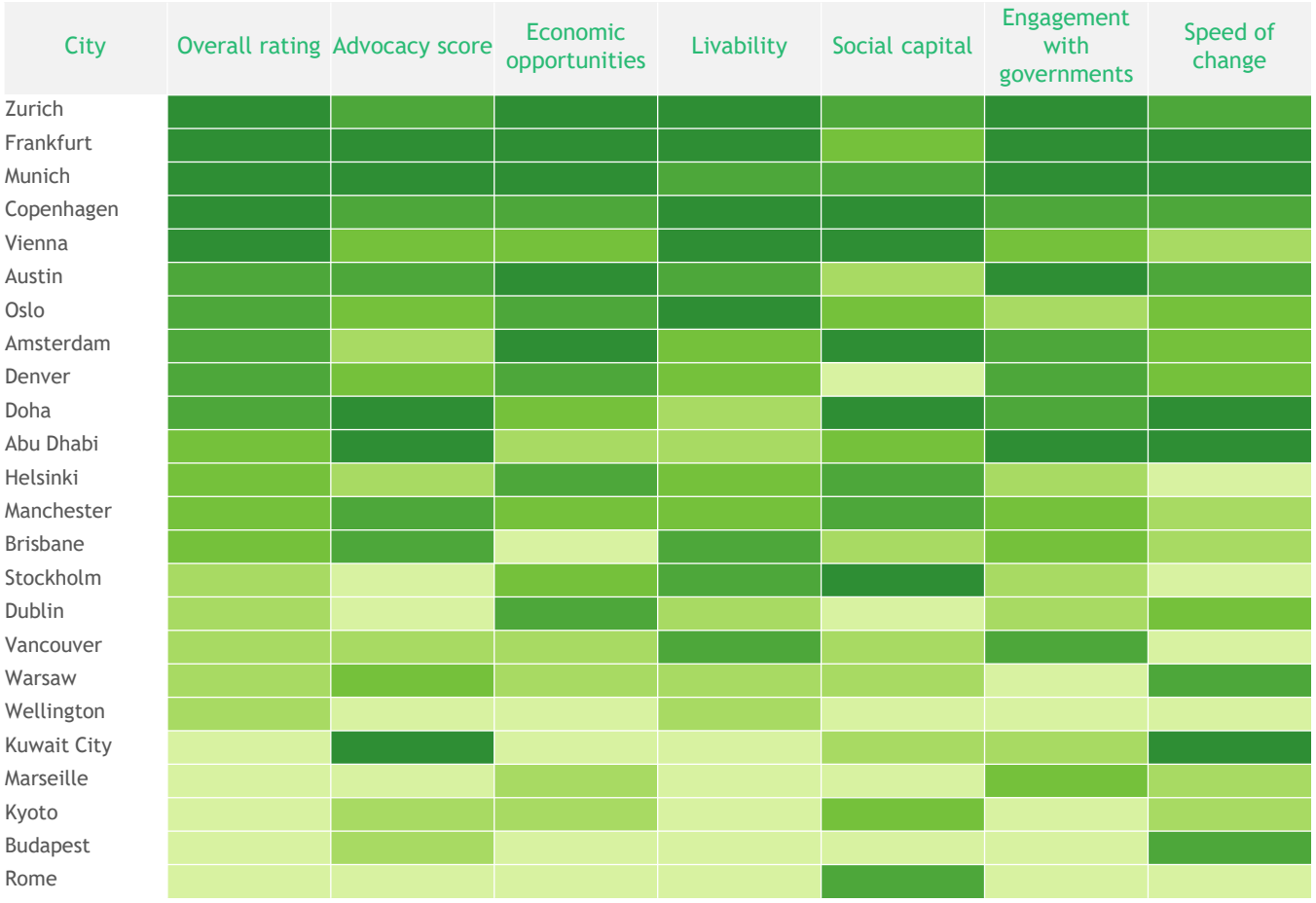
## Key outcomes

- Overall, the group is mature with mostly above-average scores but, at the same time, with limited improvement over time
- Advocacy is strong across all cities, but results differ mainly in economic opportunities and livability; social capital is the main weak area
- Berlin is #1 as the city with the most balanced performance across the dimensions, with Dubai, Washington, and San Francisco closely following
- Saudi cities move fastest, showing high speed of change and advocacy, but still lag on fundamentals
- US cities lead in economic opportunities along with Dubai but are weak in social capital; Washington is in top 3 as an anchor for a broader metro area

# Ranking by group: prosperous middleweights

Cities with more than $25,000 GDP per capita and urban area population of less than 4M




Note on subdimensions: Economic opportunities: opportunities for work, career, and income, opportunities for business, equality of income, availability of personal loans. Livability: ability to influence events, government services, business environment, cleanliness and hygiene, comfortable climate, consumption of goods and services, ecology, education and development, entertainment and recreation, health care, housing, mobility, public spaces, resilience to emergency situations. Social capital: inclusivity and equality, identity with culture and history, safety, social connections. Speed of change: speed of change in economic opportunities, speed of change in engagement with governments, speed of change in livability, speed of change in social capital.

## Key outcomes

- European cities lead, but ME is catching up quickly with Doha in the Top 10 and some cities from the West are becoming laggards, e.g., Marseille, Budapest, Rome
- Overall, this group of cities performs lower in social capital and speed of change, except for Doha, which is strong in both dimensions (64 in social capital and 87 in speed of change)
- Zurich, Frankfurt, and Munich perform well across all dimensions, leading in economic opportunities and engagement with governments
- Abu Dhabi almost enters the top 10, with high scores in speed of change and advocacy, signaling high potential

# Ranking by group: developing middleweights

## Cities with under $25,000 GDP per capita and urban area population under 4M

| City | Overall rating | Advocacy score | Economic opportunities | Livability | Social capital | Engagement with governments | Speed of change |
|---|---|---|---|---|---|---|---|
| Dammam | | | | | | | |
| Almaty | | | | | | | |
| Mecca | | | | | | | |
| Astana | | | | | | | |
| Medina | | | | | | | |
| Baku | | | | | | | |
| Tashkent | | | | | | | |
| Casablanca | | | | | | | |
| Ulaanbaatar | | | | | | | |

Note on subdimensions. Economic opportunities: opportunities for work, career, and income, opportunities for business, equality of income, availability of personal loans. Livability: ability to influence events, government services, business environment, cleanliness and hygiene, comfortable climate, consumption of goods and services, ecology, education and development, entertainment and recreation, health care, housing, mobility, public spaces, resilience to emergency situations. Social capital: inclusivity and equality, identity with culture and history, safety, social connections. Speed of change: speed of change in economic opportunities, speed of change in engagement with governments, speed of change in livability, speed of change in social capital.

## Key outcomes

- Overall, this group is about a high pace of change and low capacity, except Ulaanbaatar, where fundamentals and speed of change are low along with advocacy
- The group is advocacy-rich but with lacking capability—high citizen alignment and change intent without current supporting economic or social foundations
- Tashkent leads in speed of change (89)—a top 5 performer across the full 80-city ranking—reflecting rapid gains in economic opportunities and engagement with governments
- Almaty performs average or above average in most livability subdimensions, except ecology and resilience, where it clearly lags behind

Section 4

# Key forward-looking themes

# Deep dives on key forward-looking themes…

| | | |
|---|---|---|
| Work and lifestyle | 1 | Companies continuing to adapt to distributed work, norms forming around hybrid work |
| | 2 | People do more of their daily activities online and spend more time at home |
| | 3 | New wave of automation driven by the rise of AI impacting creative work in cities |
| Safety and well-being | 4 | People increasingly value wealth of personal time |
| | 5 | Cities need to adapt to aging urban population and longevity and health tailwinds |
| | 6 | Resilience and safety concerns are growing in the cities |
| | 7 | Housing markets becoming more unaffordable |
| | 8 | Objective reality in cities and subjective perceptions of residents do not always match |
| Urban structure | 9 | Congestion and long commute times are rising steadily in large cities |
| | 10 | "Connected city" (15-minute city index) delivers superior resident value |
| | 11 | Downtowns strained since the pandemic due to remote and hybrid working |
| Economic mobility | 12 | Cities will benefit more from the growing travel economy and benefit from business travelers extending work trips for leisure |
| | 13 | Affluent executives are semi-permanently on the move for enhanced economic opportunity and livability |

# …providing additional insights on cities' positioning

- Highest share of online adepts – Mumbai
- City with the highest resident advocacy - Mecca
- The most optimistic city about GenAI – Shenzhen
- Leaders in amount of time that residents spent at leisure locations - Dubai and Abu Dhabi
- Cities where people meet with their friends most frequently - Tashkent and Ho Chi Min City
- Best cities to prepare for longevity - Zurich and Beijing
- Best cities to move to for retirement to ensure longevity - San Francisco and Sydney
- Leaders in perceived safety - Riyadh and Mecca
- The most "connected"[1] city - Amsterdam
- City with the largest number of destinations – Istanbul
- City with the highest inbound visitor spending – Dubai
- Cities that will gain the most from business visitors expanding their stay for leisure – Dubai and Tokyo

1. A city with high accessibility of amenities via walking or PT.

Theme 1

# Hybrid and distributed work

Companies continuing to adapt to distributed work, norms forming around hybrid work

# Hybrid work has become the new normal, with collaboration increasingly distributed and digital

Our global survey of 25,000+ residents across 83 cities shows that hybrid is no longer an experiment—it is part of everyday work, shaping where, with whom, and how people collaborate

## Where people work

**51%** of respondents work from home at least 1-2 days per week

**25%** of respondents work from home at least 2-3 days per week

Top ranked cities: Atlanta, Miami, Kyoto, Osaka, Seoul, Berlin

Hybrid schedules are now the norm rather than the exception

## Whom they work with

**47%** of respondents' colleagues are based in other cities

Top ranked cities: Frankfurt, Oslo, Berlin, Tashkent, Phoenix

Collaboration networks are increasingly distributed and global

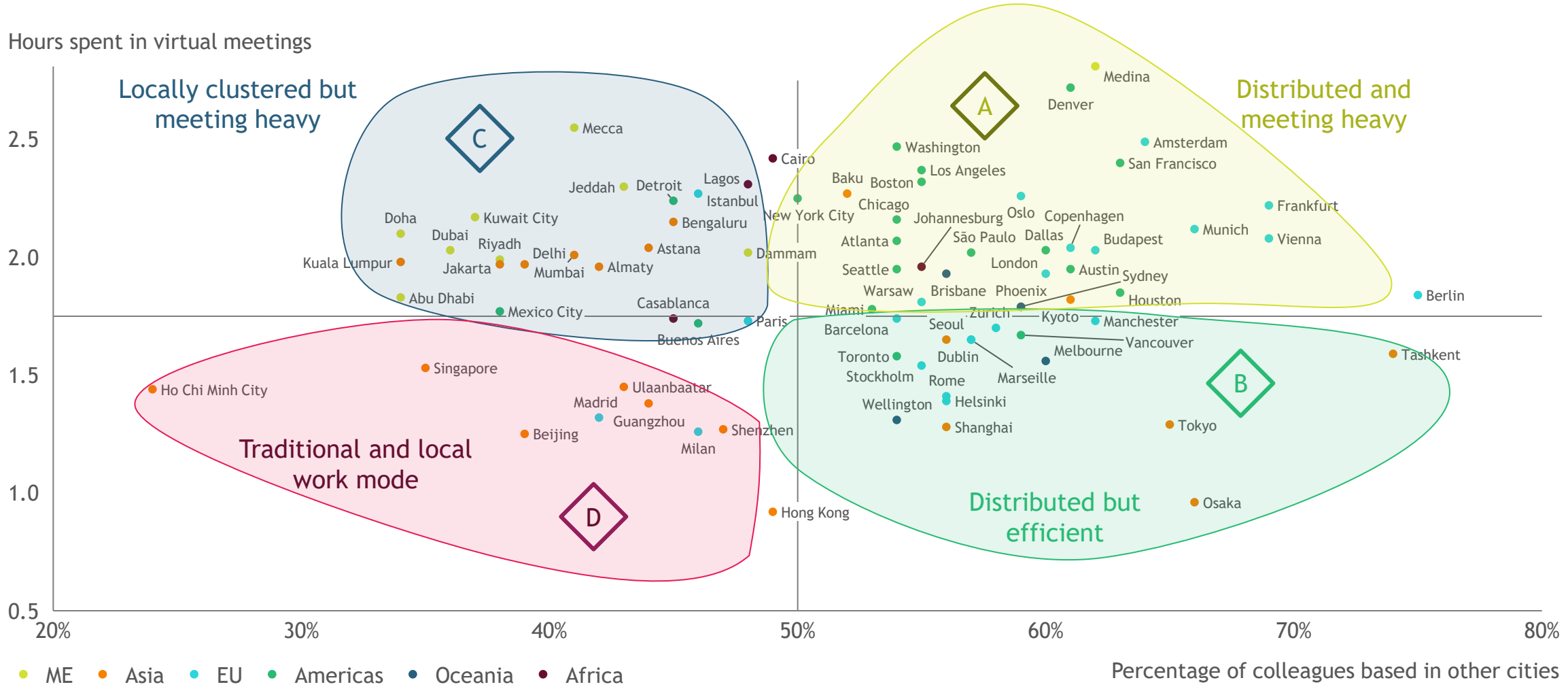
## How they work

Employees spend, on average, **1.9 hours** per day in virtual meetings when in the office

Top ranked cities: Medina, Baku, Cairo, Astana, Jeddah, Mecca

Digital tools and virtual collaboration are embedded in daily routines

# The global survey reveals four archetypes of hybrid work




Note: The graph reflects responses from respondents with above-average income.

# Cities reveal distinct collaboration patterns with different implications for hybrid work

| | Distributed and meeting heavy | Distributed but efficient | Locally clustered but meeting heavy | Traditional and local work mode |
|---|---|---|---|---|
| Description | Teams are widely distributed across locations, and employees spend significant time in virtual meetings to stay connected | Distributed teams operate effectively with relatively little time spent in virtual meetings | Teams are primarily based in the same location, but employees still spend long hours in virtual meetings | Collaboration remains predominantly local, with limited use of virtual meetings |
| Implication | Cities should invest in top-tier digital infrastructure and foster international connectivity to remain competitive hubs for global work | These cities indicate mature hybrid practices; other organizations can learn from these cities as benchmarks for efficient hybrid work | These cities are often large urban centers with heavy traffic, and improving commuting efficiency would significantly enhance their overall productivity | Cities need to prepare for a gradual shift toward hybrid work models by strengthening digital infrastructure and expanding coworking spaces |
| Examples | Frankfurt, Washington, Amsterdam | Sydney, Barcelona, Seattle | Cairo, São Paulo, Jeddah | Hong Kong, Osaka, Shanghai |

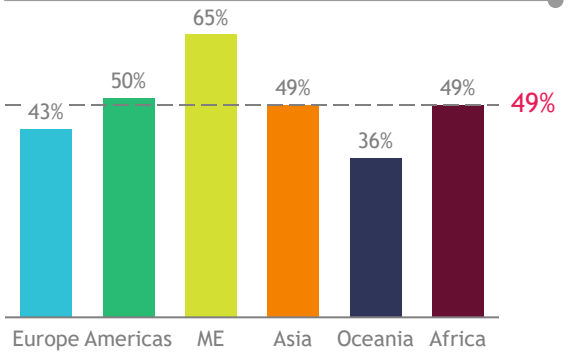
Theme 2

# Life online

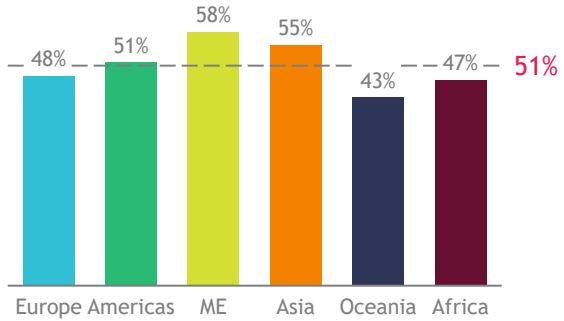
People do more of their daily activities online and spend more time at home

# Penetration of online channels in daily activities varies across regions and types of activity

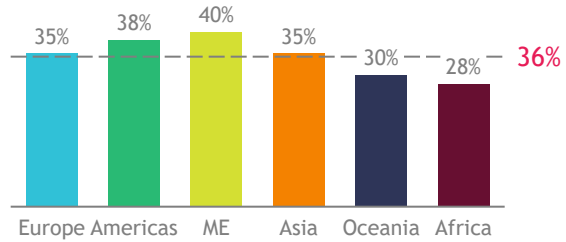
*Residents who prefer to buy groceries through online channels[1] (%)*



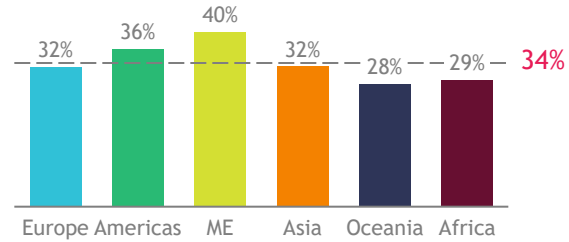

*Residents who prefer to do shopping through online channels (%)*



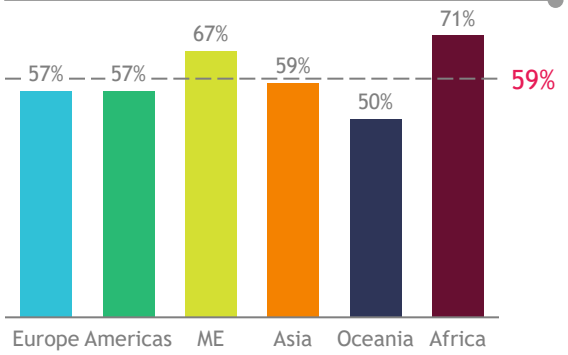

*Residents who prefer to get medical services through online channels (%)*



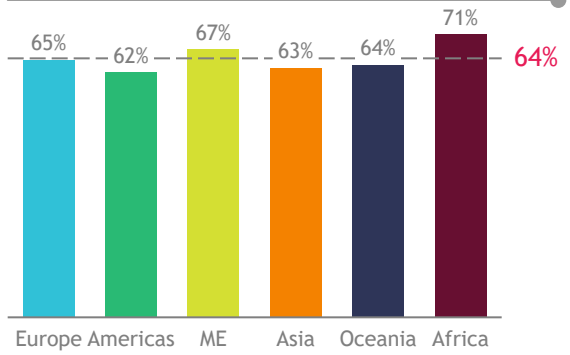

*Residents preferring online fitness channels (%)*



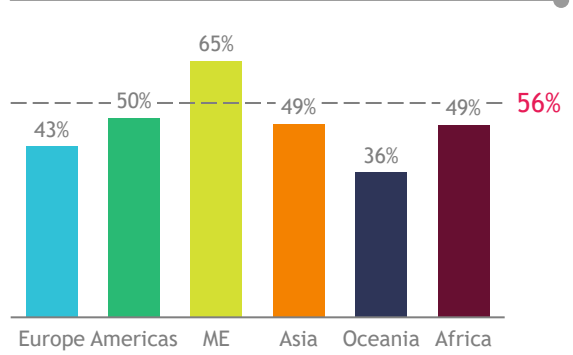

*Residents preferring online entertainment channels (%)*




*Residents who prefer to receive banking services through online channels (%)*

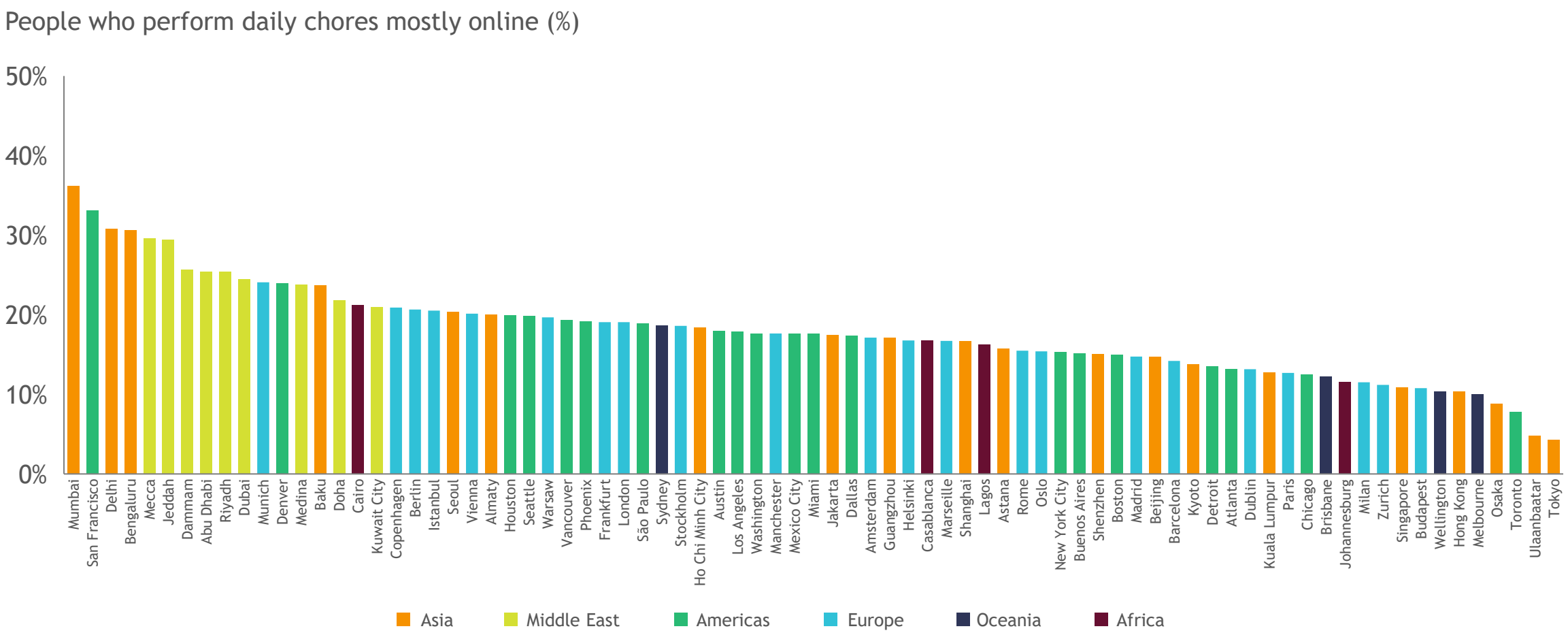



*Residents who prefer to get government services through online channels (%)*




1. Those who use online channels in 50% of cases are counted with a coefficient of 0.5.

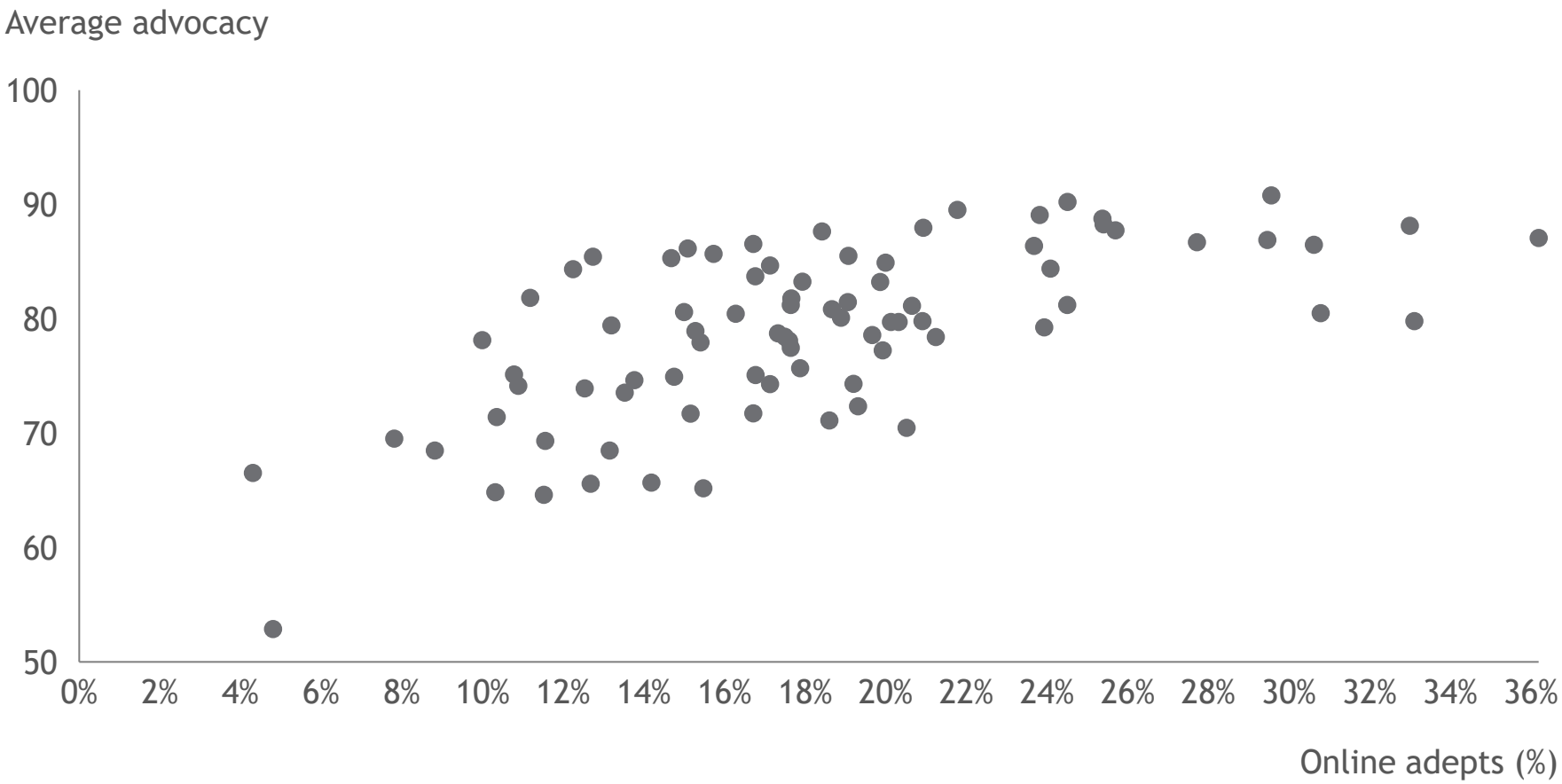
# Nineteen percent of online adepts[1] perform daily chores[2] mostly online, with Middle Eastern cities showing a higher share of such individuals than other cities




1. Perform at least four activities entirely online, with no more than two activities entirely offline.
2. Includes groceries, shopping, health care, fitness, entertainment (films, series, theatre, sports), banking and personal finance (paying bills, sending money, applying for loans, etc.), city government services (utilities, applying for permits and IDs, reporting city issues, voting, etc.).

# Penetration of online services correlates with advocacy—cities with a higher share of online adepts demonstrate stronger advocacy

| Online profile | Average advocacy |
|---|---|
| Online adepts | 83.3 |
| 50/50 | 80.0 |
| Offline adepts | 72.1 |



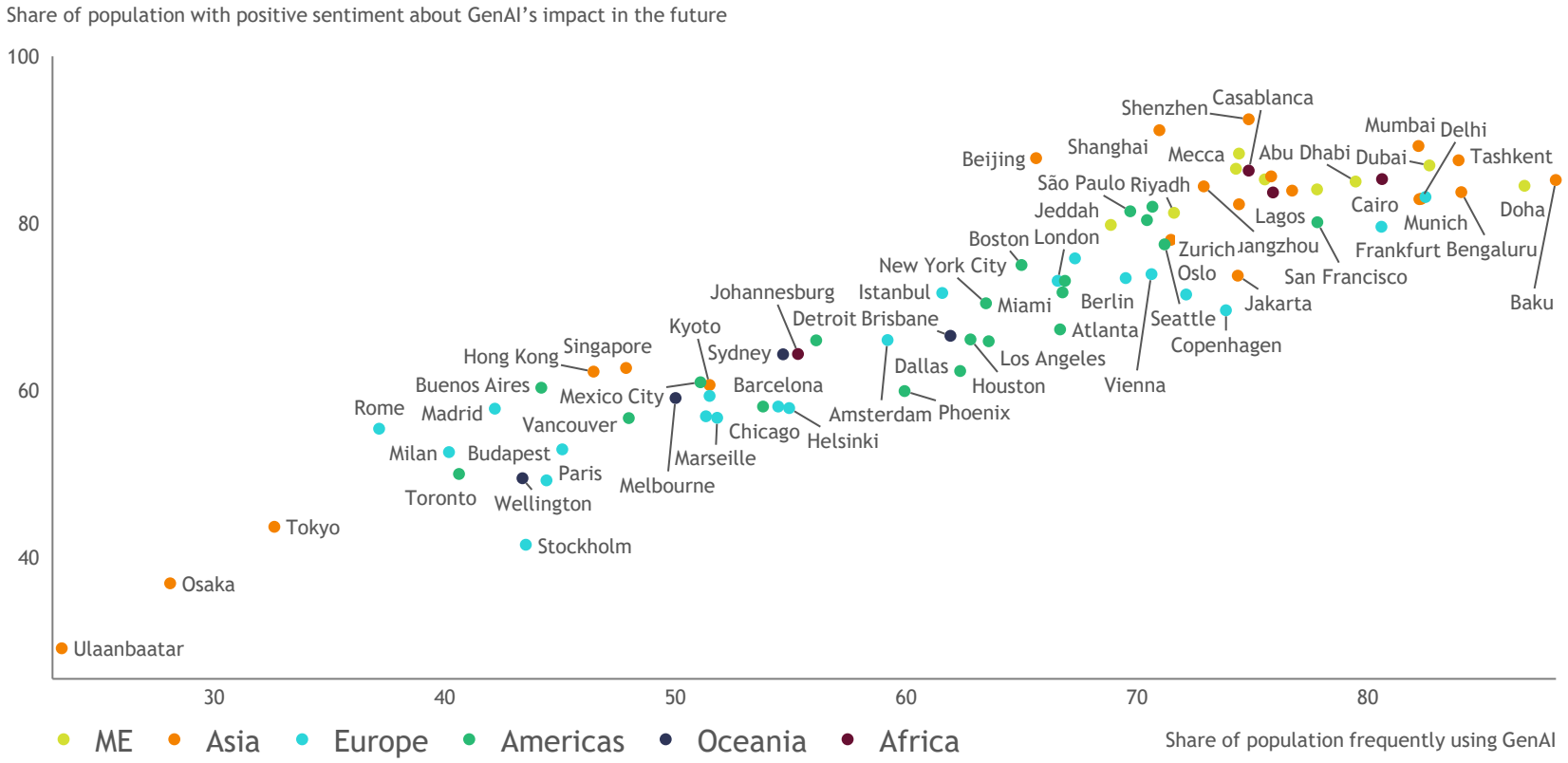
Theme 3

# GenAI and the creative class

New wave of automation driven by the rise of AI and robotics impacting creative and knowledge work that tends to be concentrated in cities

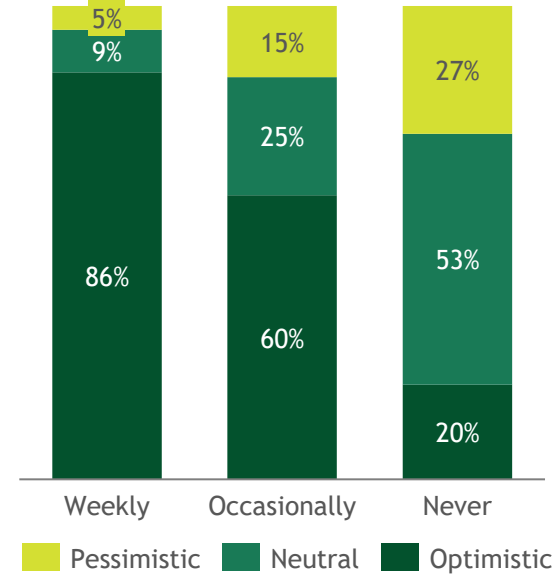
# Across cities, the higher frequency of GenAI usage is clearly linked with higher optimism about GenAI's impact on life

## Middle East, much of Asia, and Africa cluster in the high-adoption and high-optimism quadrant, while most American and European cities sit midpack on usage, with comparatively moderate optimism



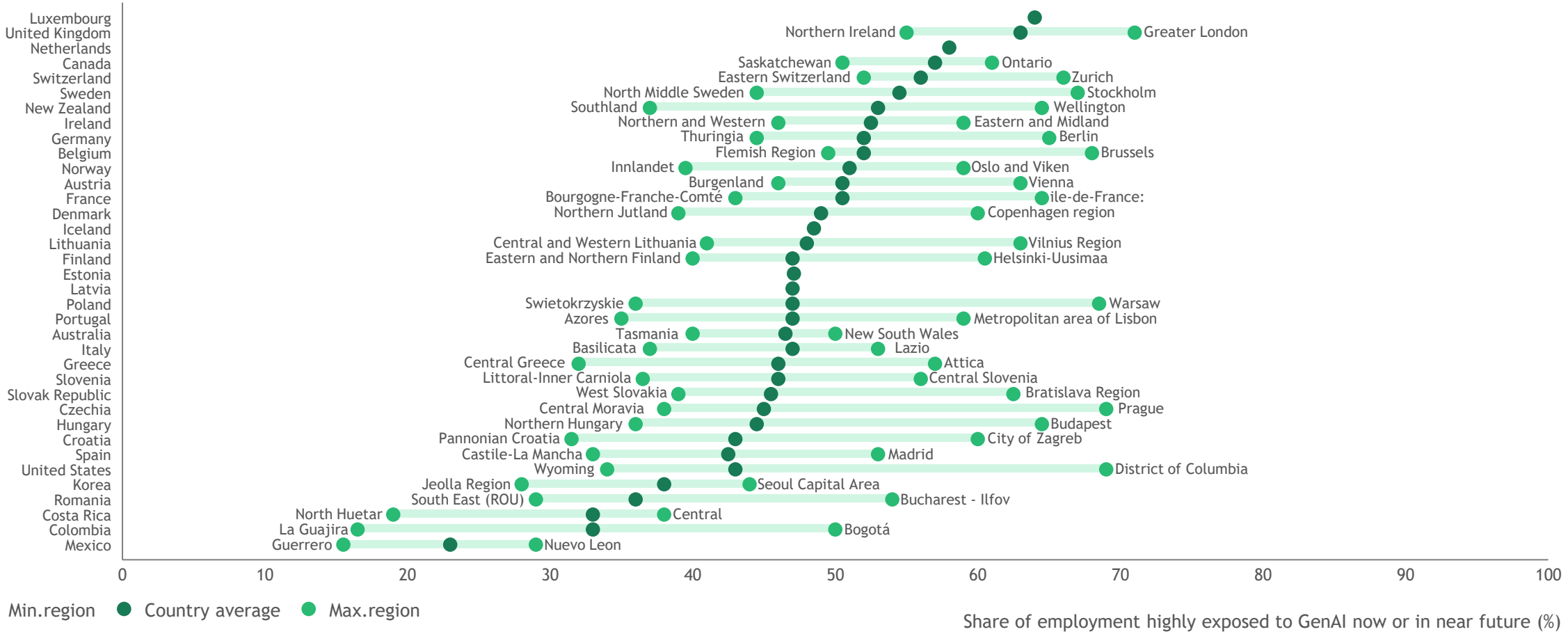

## Sentiment improves with GenAI usage

Weekly users are the most optimistic about GenAI's impact, while nonusers are the most pessimistic



# However, the labor market's exposure to GenAI could range from 16% to 77% across regions

## Share of employment highly exposed to GenAI now or in the near future, latest available year



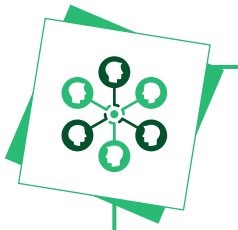

Source: Job Creation and Local Economic Development, 2024.

# The creative class is core to cities' existence

> **"Places that succeed in attracting and retaining creative class people prosper; those that fail don't."**
>
> — Richard Florida, The Rise of the Creative Class (2002)

## Cities thrive on creativity…

- Cities depend on creative talent to drive innovation, fuel economic growth, and inspire urban renewal
- Creative people transform declining urban areas into vibrant neighborhoods, bringing economic and cultural revival
- Without creativity, cities lose their competitive edge, becoming economically stagnant and culturally depleted



## …and creativity flourishes in cities

- Urban areas provide the density, connectivity, and collaborative networks essential for creative innovation
- Cities offer inspiration, resources, and opportunities that empower creative professionals to achieve their highest potential
- Creative ideas flourish in dynamic urban environments where cultural exchange and diversity of thought are abundant

Note: Creative class refers to people working in the following industries: publisher, executive and fine arts, movies and videos, architecture, music, design, advertising and marketing.

# There is no single approach—most cities recognize two groups: 7 industries as creative and 16 more are present in various classifications

## The most characteristic types of creative industries (present in most classifications)

Publisher[1]

Executive and fine arts

Movies and videos

Architecture

Music

Design

Advertising and marketing

## Creative industries, according to some classifications

Fashion

Education

Television and radio

Crafts

IT, software, and computer services

Cultural heritage

Museums, galleries, and libraries

Archives and storage

Entertainment

Equipment


Sports

Toy production

Home appliances and household goods

Photo

Tourism

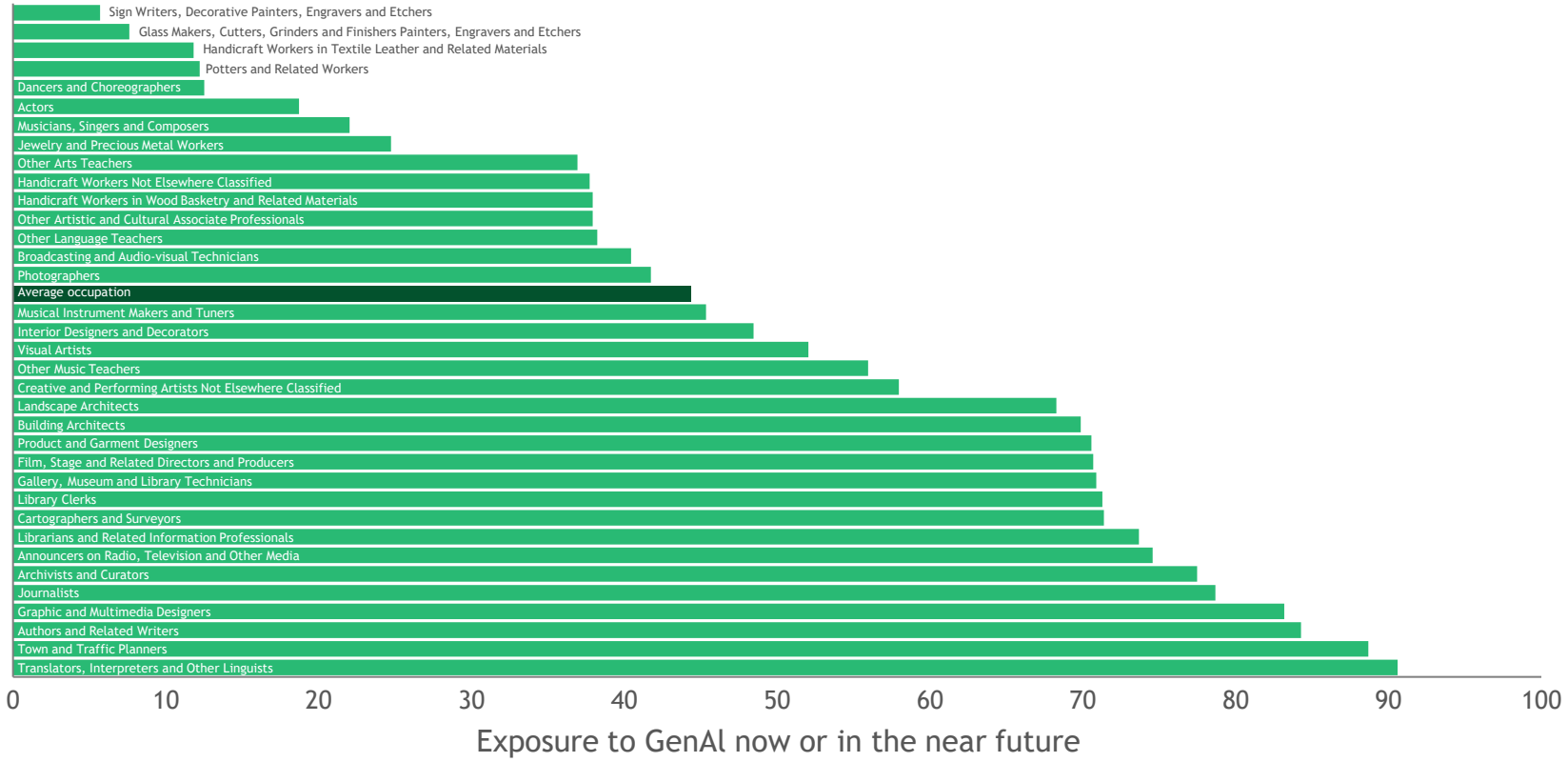
Paper production

1. Includes literary works, books, and the press.
Source: ESSnet Culture; Guide to Eurostat Culture Statistics; UNESCO Framework for Cultural Statistics handbook No. 1; BCG analysis.

# Both groups are most significantly exposed to and most optimistic about the perspective

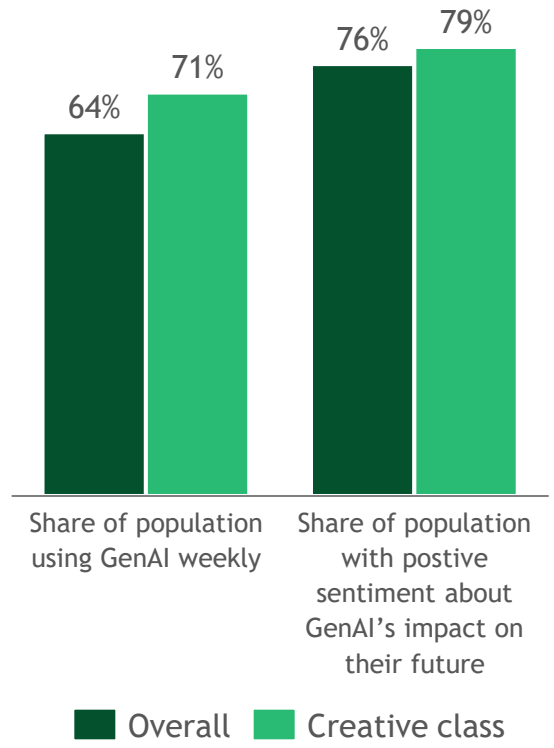
## Most cultural and creative occupations are more exposed than the average occupation, up to more than double

Average exposure now or in the near future, cultural and creative occupations[1]




## However, survey indicates stronger sentiment in creative class

GenAI usage and positive sentiment: overall vs. creative class




1. Cultural and creative occupations are defined in ISCO at the 4-digit level according to the Eurostat definition used by the OECD.
Source: (Eloundou et al., 2023[47], (OECD, 2022[53]), Cities of Choice Survey, 2025.

# Cities worldwide are implementing proactive strategies to mitigate AI-driven job displacement in the creative industry

| Mitigation measure | Description | City examples |
|---|---|---|
|  Regulation and policy for protecting creative rights | Laws and guidelines protecting creators' rights and ensuring fair AI usage | • Paris (2025): National consultation developing frameworks to license creative content for AI, ensuring creators receive fair compensation and credit<br>• Seoul (2025): Basic Act on AI mandating clear labeling of AI-generated content, protecting creators from unauthorized use |
|  Union negotiations to ensure human authorship and control | Union agreements ensuring human creators maintain credit and control | • Los Angeles (2023): Writers Guild (WGA) secured contractual protections that AI-generated material cannot reduce writers' credits or compensation<br>• Los Angeles (2023): SAG-AFTRA ensured actors' informed consent and compensation for use of digital replicas or AI-generated likenesses |
|  Training and upskilling | Specialized programs helping creatives integrate AI into workflows | • Tokyo (2023–2024): Industry-supported training programs encouraging manga and anime artists to adopt hybrid creative-AI workflows |
|  Public funding and strategic investment | Public investments supporting creative industries adapting to AI changes | • London (2025): £10 million public investment in creative sectors (fashion, film, gaming), funding human-led innovation and skills training<br>• Seoul (2024): AI Innovation Hub ("AI Tech City") providing resources, financial support, and facilities to help creative businesses leverage AI effectively |

Source: French Ministry of Culture, Korean Ministry of Science and ICT, SAG-AFTRA official release on AI protections, Cabinet Office of Japan, Mayor of London's Press release on creative sector investment, Seoul Metropolitan Government.

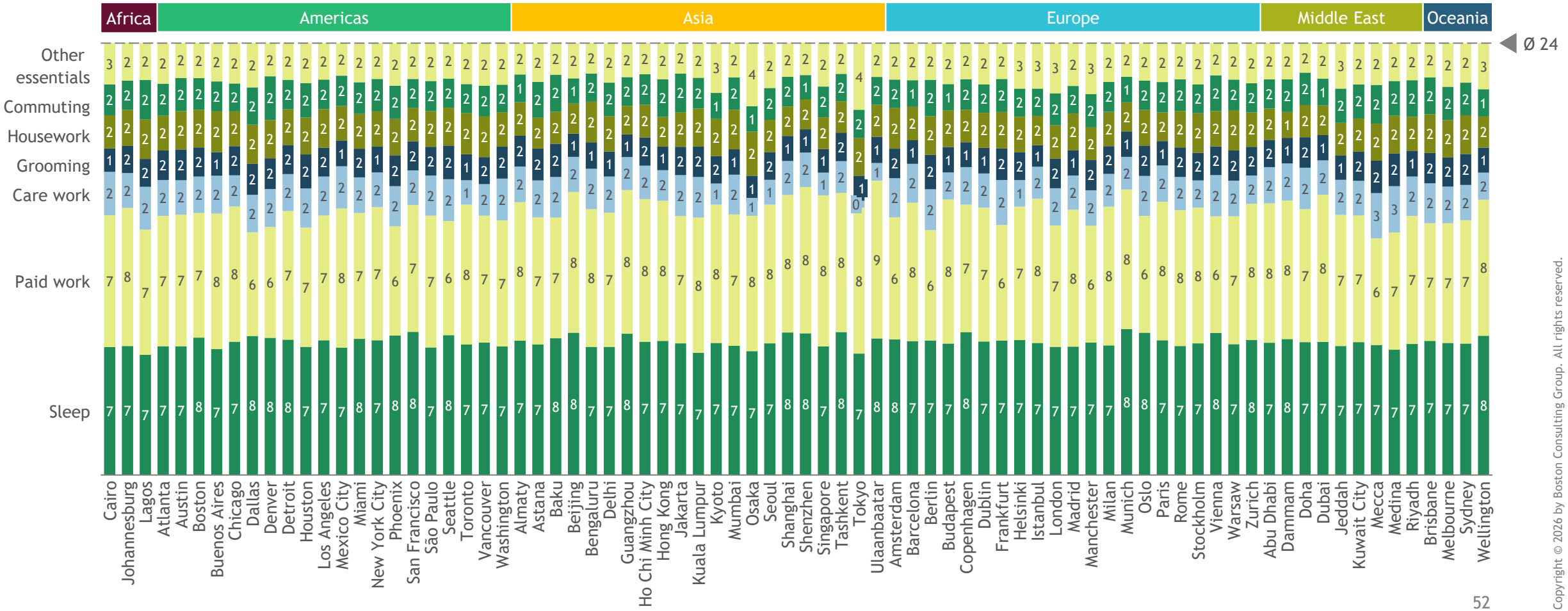
Theme 4

# Leisure time and work-life balance

People (especially young people) increasingly value leisure time and work-life balance

# Among employed people, work dominates the day, especially in Asia and the Middle East, and crowds out personal or domestic time

Survey: How much time per day do you spend on the following activities? (sum=24 hours)
Sample: Employed respondents, n=120-300 per city



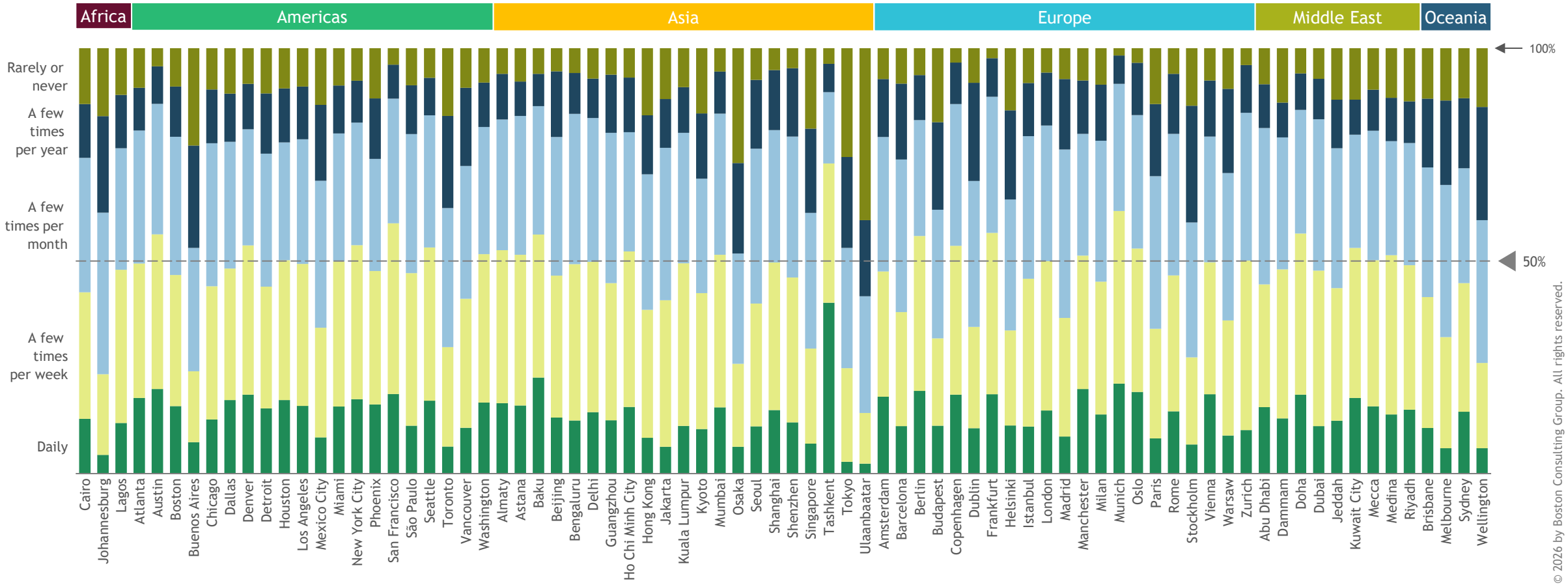
# Work intensity peaks during midcareer years in over 50 cities, while in about 20 cities, residents aged 55 and older work the most, on average

Average daily hours spent on paid work by employed people by age group


Survey: How much time per day do you spend on paid work?
Sample: Employed respondents, n=120-300 per city.

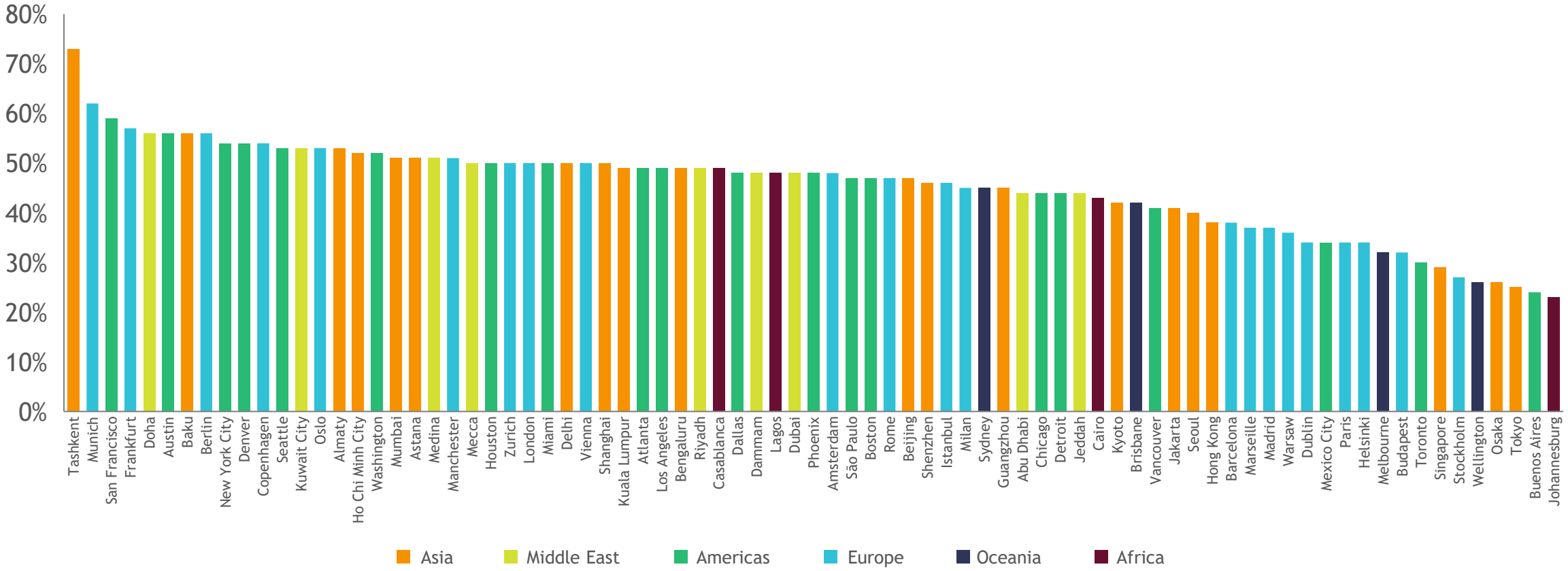
# Only in 29 cities do more than half of the respondents visit leisure locations at least a few times a week

Survey: How frequently do you visit the following social and leisure locations within your city (restaurants, cafes, markets, bars, parks, entertainment)?
Sample: All respondents, n=~300 per city



# All Central Asian and German cities are in top 20

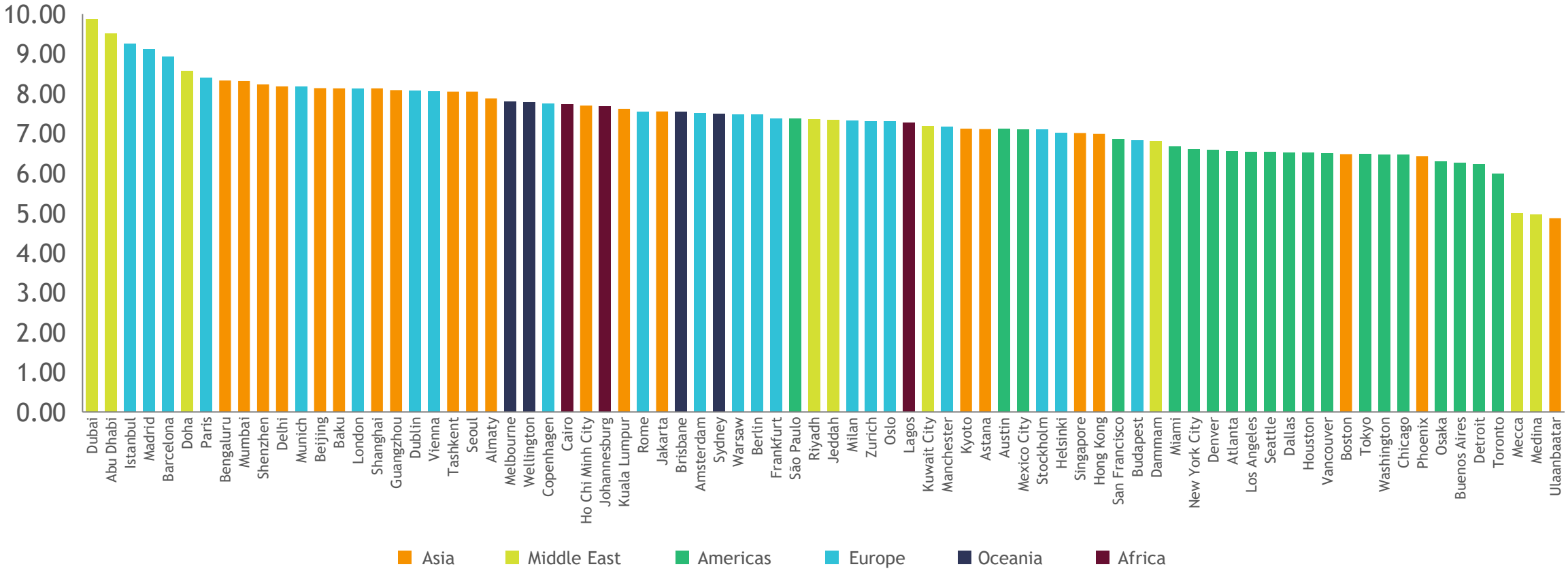
People who visit leisure locations at least several times a week (%)




Survey: How frequently do you visit the following social and leisure locations within your city (restaurants, cafes, markets, bars, parks, entertainment)?
Sample: All respondents, n=~300 per city.

# UAE, European, and Asian cities lead in time spent at leisure locations, while North American cities significantly underperform despite the high frequency

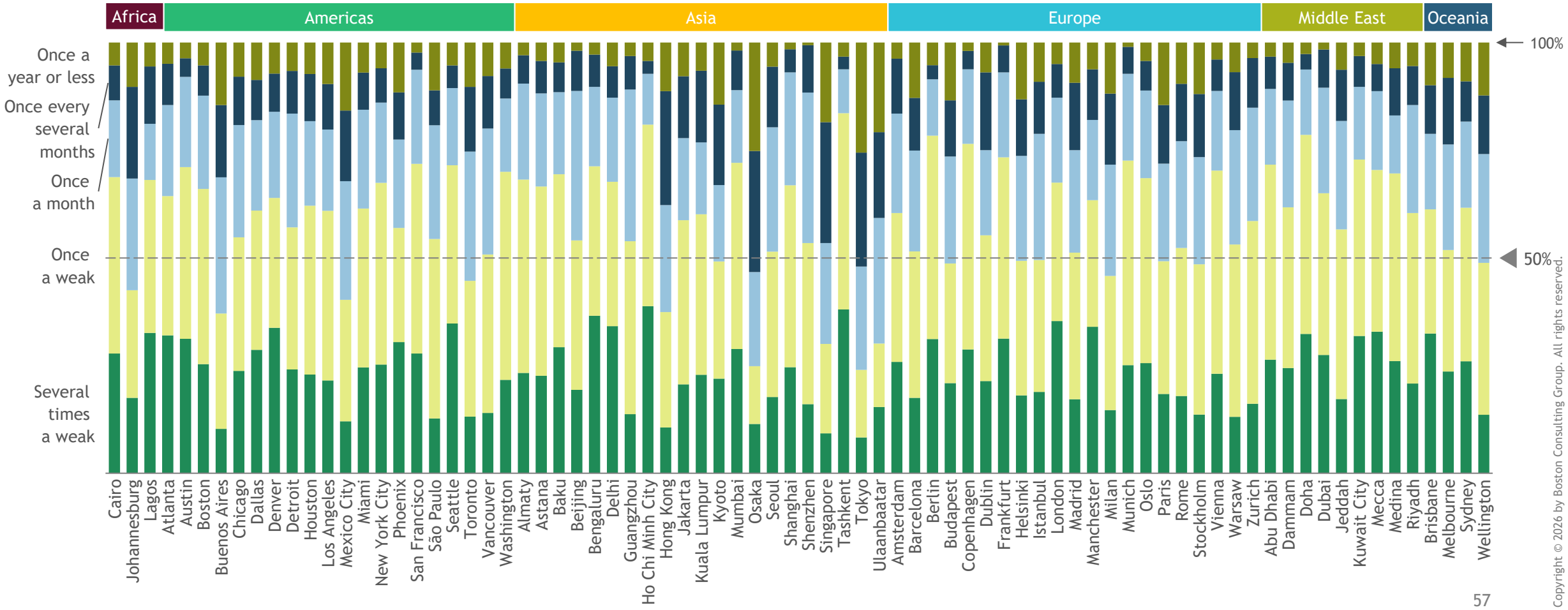
Time spent at leisure locations (hours/week)




Note: Assumptions made on the length of time (minutes) spent at each location (restaurants, cafes, markets, bars, parks and entertainment) and regarding the exact frequency number regarding the “few times per week/month/year.”

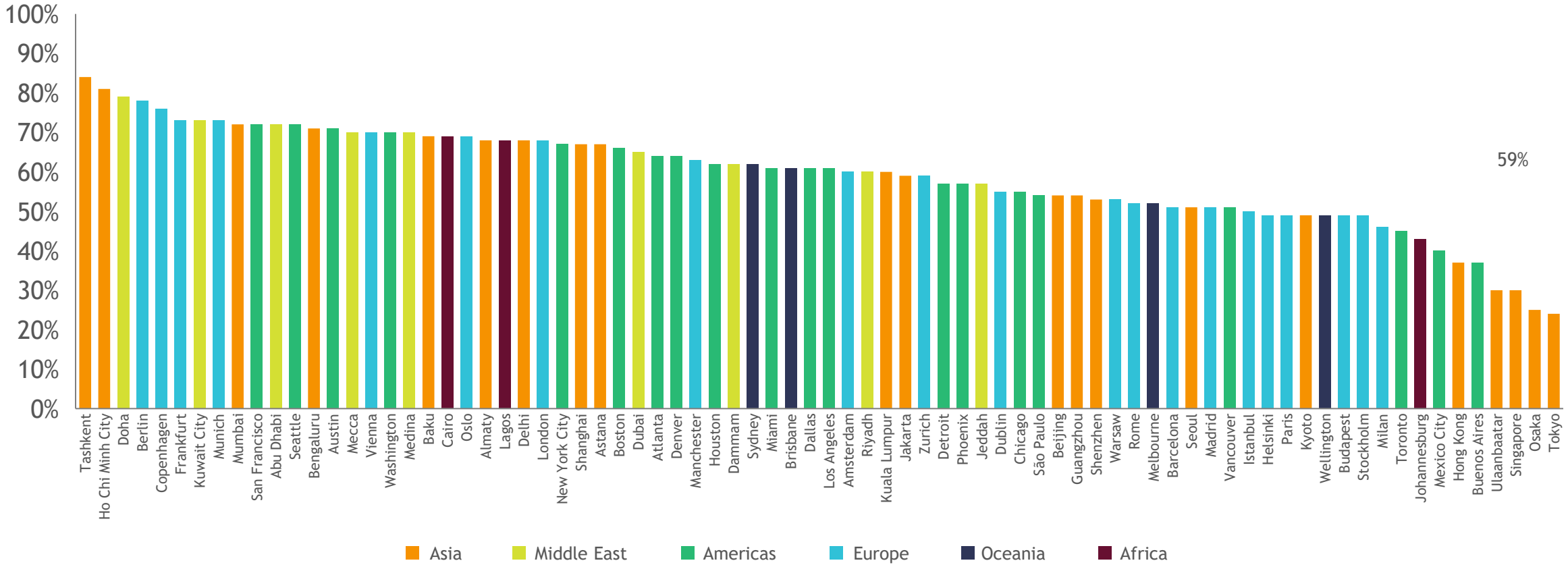
# In about 80% of cities, over half of the respondents meet friends or colleagues outside work at least once a week

Survey: How often do you meet with your friends or colleagues outside work or study?
Sample: All respondents, n=~300 per city



# Tashkent and Ho Chi Minh City lead in this category

Residents meeting friends outside of work at least once a week (%)




Survey: How often do you meet with your friends or colleagues outside work or study?
Sample: All respondents, n=~300 per city.

# On average, respondents aged 18 to 34 meet with friends more frequently, except in smaller ME cities, where older age groups are more socially active

Residents meeting friends outside of work at least once a week (%)


Survey: How often do you meet with your friends or colleagues outside work or study?
Sample: All respondents, n=~300 per city.

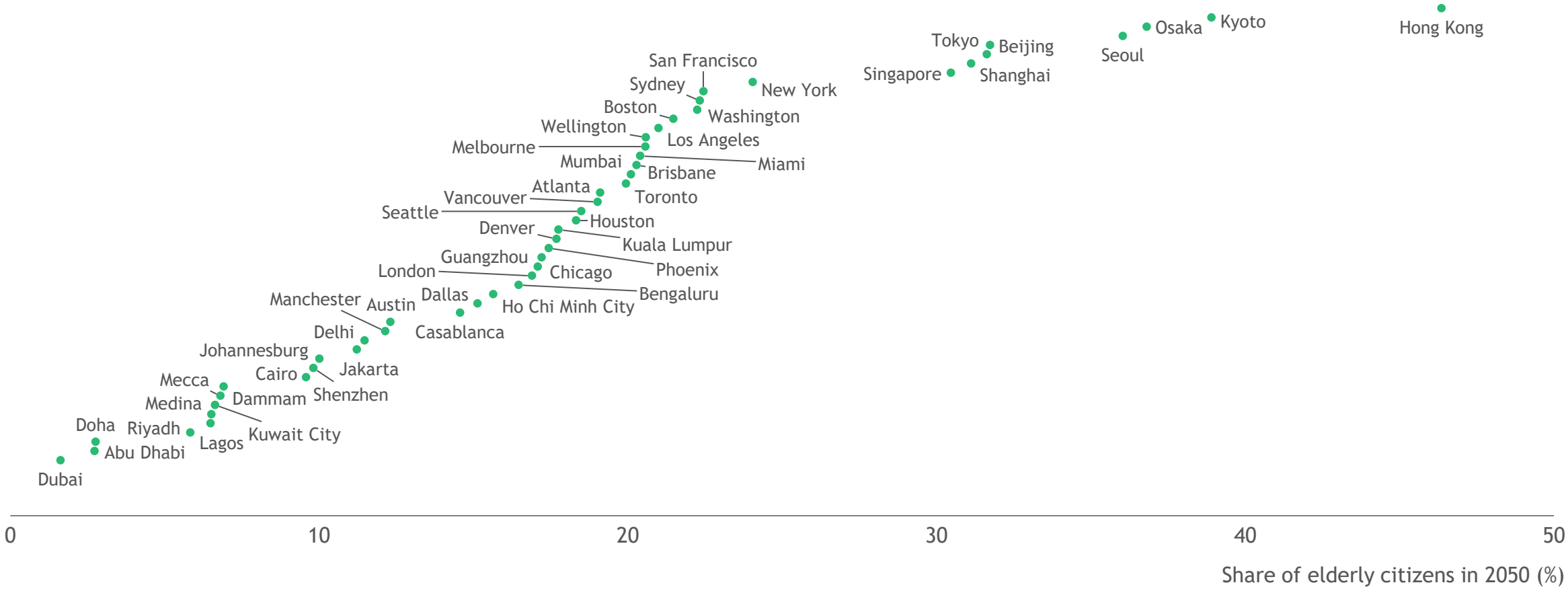
Theme 5

# Longevity and healthy aging

Ultralow fertility levels and longevity and health tailwinds are leading to high proportions of elderly people

# The share of the population aged 65 and older is set to rise in many cities and may grow even more due to policies and quality of health care

## Share of 65+ population of total population across cities (2050)




Note: Elderly population assumed at 65+ years old across cities. Projections made assuming cities maintain current policies and regulations.
Source: BCG analysis; Oxford Economics.

# Longevity and healthy aging are mandatory for a city's long-term success because needs are rising for current and future residents

Longevity and healthy aging are about more than simply living longer—they are about ensuring quality of life as people age. For cities, supporting healthy aging is critical to reducing social and health care burdens and preparing younger populations to sustain long-term well-being. Cities need to support two life strategies:

## Invest early to build health capital
*Longevity index (35-60 years old)*

- Longevity starts well before old age—habits formed at a younger age shape well-being later in life
- A city's long-term livability depends on how it equips younger residents with tools and environments to age healthily
- By fostering healthy lifestyles early, cities create a culture of wellness that benefits individuals and society across generations

*We look at which city is best in longevity for people 35-60 years old, since cities play a critical role in providing infrastructure for longevity*

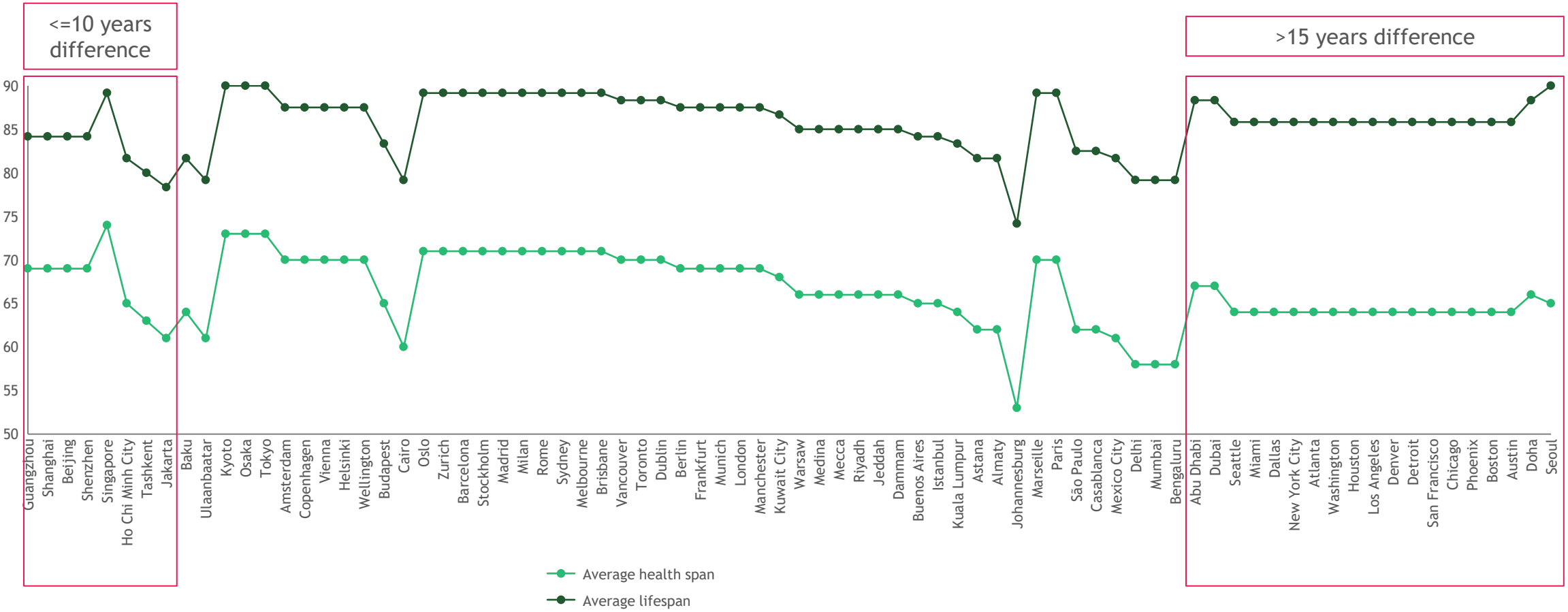
## Preserve health capital for lifelong well-being
*Healthy aging index (60+ years old)*

- A longer life isn't always a healthier one—the goal is to extend health spans, not just lifespans
- By 2050, 22% of the global population will be 60 years old or older—that's one in every five people
- Supporting healthy aging reduces the strain on health care systems and social services, while enabling older adults to remain active contributors to society

*We look at which city is best for healthy aging in terms of living an active life and receiving decent care, focusing on people 60+ years of age*

# A large gap between lifespan and health span may signal that cities lack the required infrastructure and services for people to live longer, healthier lives

Seoul and Doha, as well as US and Indian cities, have the biggest gap between life and healthy life expectancy, whereas many Asian cities have the smallest difference




Note: Life expectancy and healthy life expectancy are country-level data.

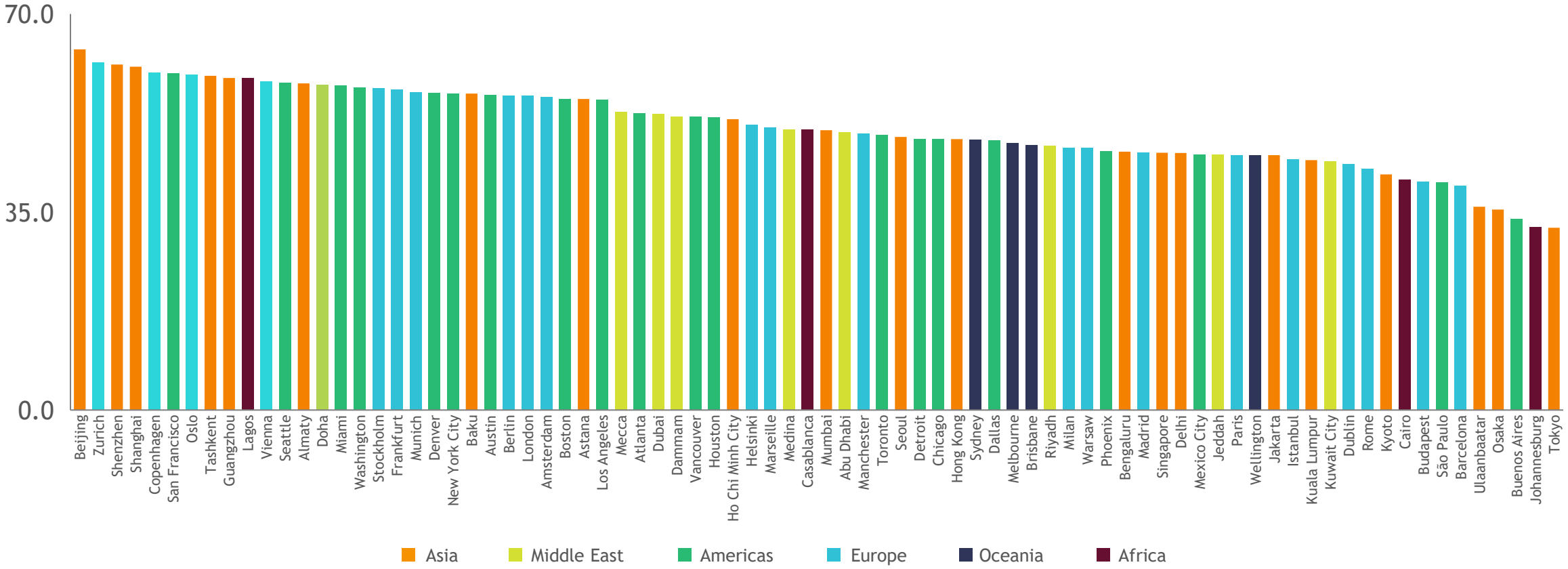
# This report measures seven of eight core healthy habits[1] that build health capital early for people 35 to 60 years old and two longevity indicators

| Core dimensions that build health capital early | | Longevity indicators measured in *Cities of Choice 4.0* |
|---|---|---|
| Healthy habits | Exercise regularly | 1 Share of population that practices sports regularly |
| | | 2 Share of middle-aged population that has participated in healthy lifestyle programs at least once in the past year |
| | | 3 Share of population that uses walk/run as primary choice when going somewhere |
| | | 4 Number of fitness centers and swimming pools per 100,000 population |
| | Positive social connections | 5 Share of middle-aged population that feels him/herself is part of a community |
| | | 6 Average number of times meeting up with friends per month |
| | | 7 Loneliness score |
| | Restorative sleep | 8 Hours of sleep per day |
| | Manage negative stress | 9 Happiness score |
| | Healthy, balanced diet | 10 Number of local farmers' markets with access to fresh food, per 100,000 population |
| | | 11 Obesity rates |
| | No excessive alcohol consumption | 12 Share of population that excessively consumes alcohol |
| | Never smoke | 13 Share of population that smokes |
| | No opioid use | Not included |
| Outdoor space | | 14 Average number of hours spent outdoors per week |
| | | 15 Share of the city's area allocated for green spaces |
| NCDs[2] | | 16 Probability of dying between 30-70 years old from NCDs[2] |

1. Source: Nguyen et al. : Impact of 8 lifestyle factors on mortality and life expectancy among United States veterans: The Million Veteran Program.
2. NCDs: Noncommunicable disease (cardiovascular diseases, cancer, diabetes, or chronic respiratory diseases).

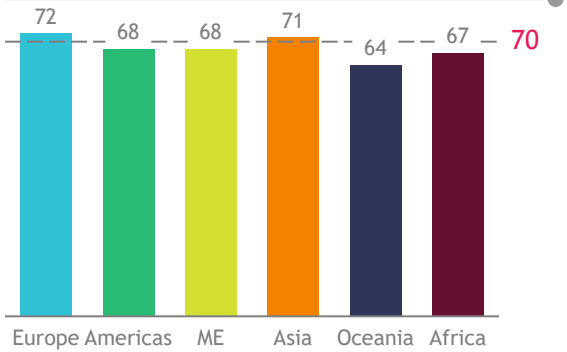
# Leadership on longevity ranking for people 35 to 60 years old sits largely in Asia and Europe, but Japan falls behind the pack

Longevity for population 35-60 years old, subranking score (0-100)

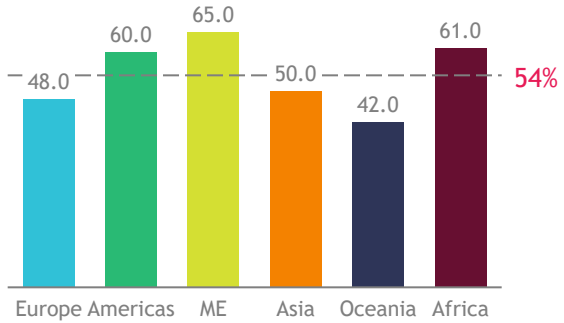


# Details | Across survey-based indicators, Middle Eastern cities score above average on most, whereas Oceanian cities fall behind the average

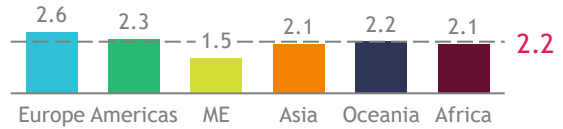
*Residents who choose walk/run as primary method when going somewhere, score (0-100)*



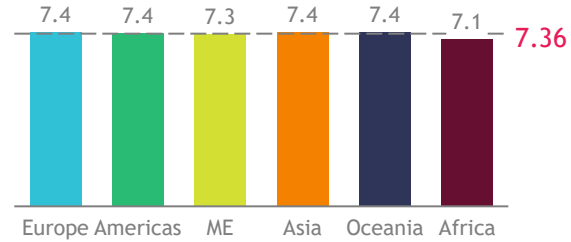

*Residents who participated in healthy lifestyle program at least once in the past 12 months (%)*



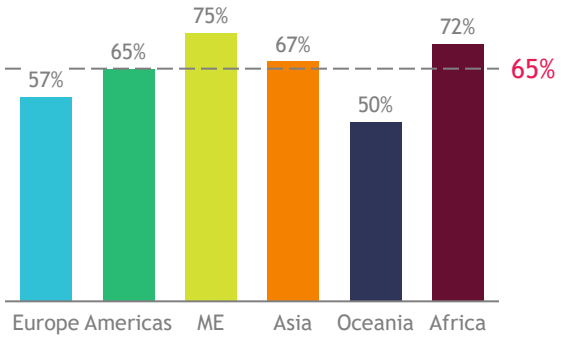

*Number of hours spent outdoors every week*



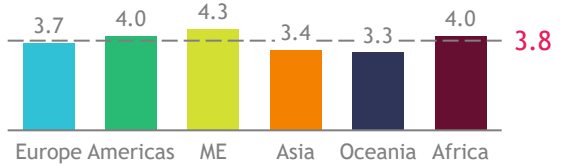

*Number of hours of sleep per day*



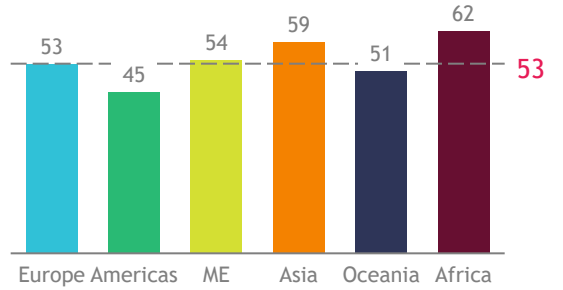

*Residents who believe him/herself belongs to a community (%)*



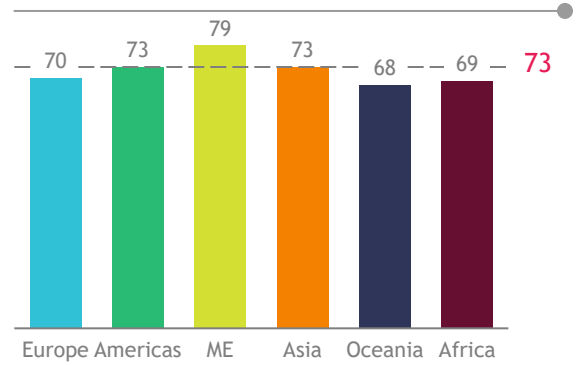

*Number of times per month that respondent meets friends/colleagues outside of work/study*



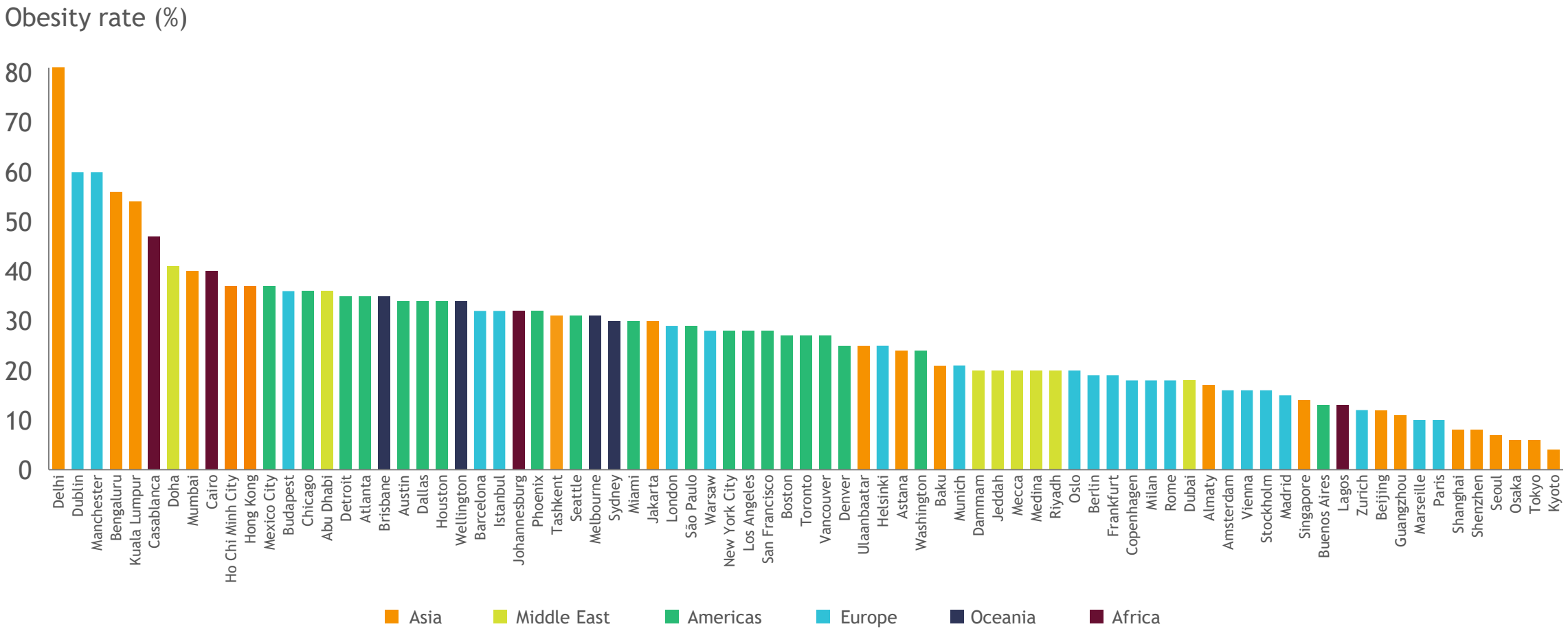

*Loneliness index, survey, share of feeling lonely; 100 most connected, 0 most lonely*




*Happiness index, survey, share of feeling happy; 100 most happy, 0 most sad*



# Details | East Asian cities and Paris have the lowest obesity rates, whereas Delhi stands at 81%



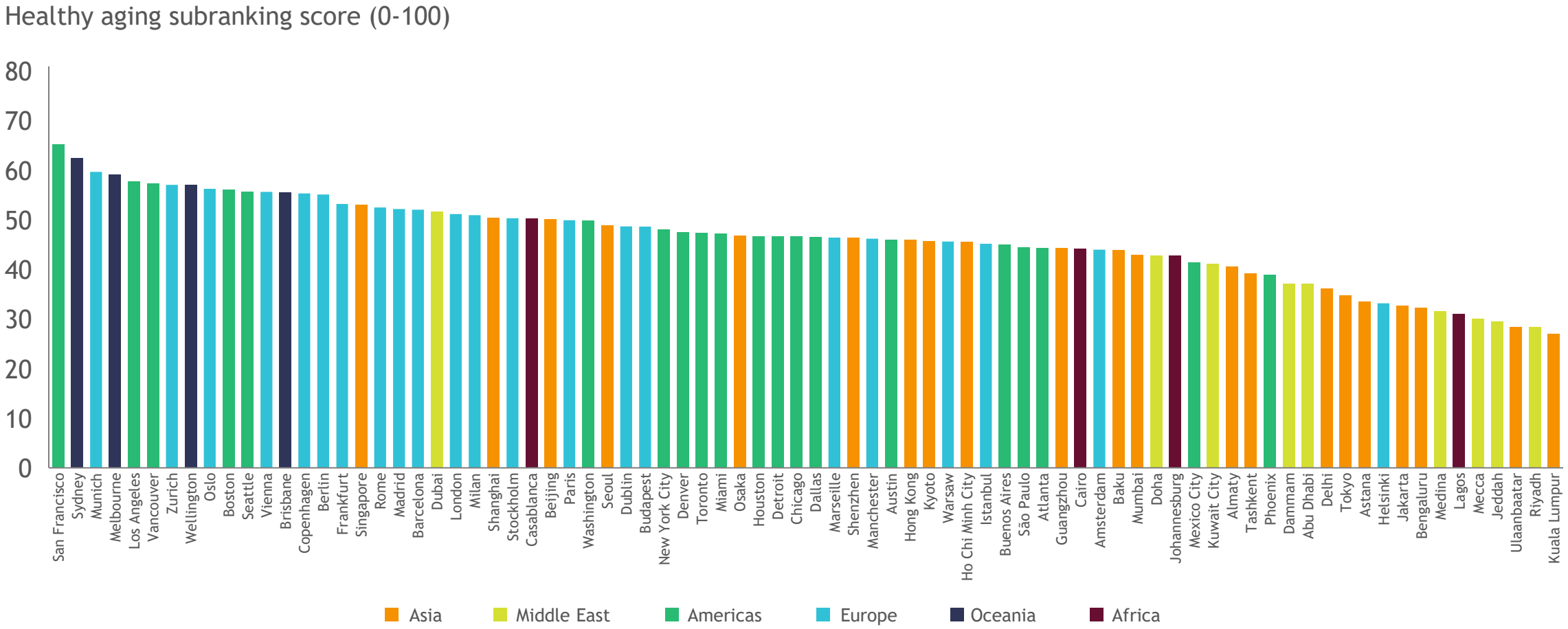
# *Cities of Choice 4.0* evaluates six dimensions to determine if a city enables residents to preserve health capital in healthy aging index

| Group | | Indicator |
|---|---|---|
| Climate 16.7% | 1 | Extreme temperatures score (Celsius degrees exceeding limits of extreme temperature) |
| | 2 | Average number of hours of sunshine per year |
| | 3 | Number of months with a comfortable daytime temperature |
| | 4 | The average annual temperature difference |
| Ecology 16.7% | 5 | Air quality: PM2.5 content |
| | 6 | Air quality: PM10 content |
| | 7 | Air quality: $NO_2$ content |
| | 8 | Air quality: $O_3$ content |
| | 9 | Commitment of city to sustainability actions |
| | 10 | Share of solid household waste that is recycled or recovered |
| Health care 16.7% | 11 | Number of doctors per 100,000 population |
| | 12 | Number of hospital beds per 100,000 population |
| | 13 | Number of ambulances per 100,000 population |
| | 14 | Days taken to receive a nonurgent medical appointment |
| | 15 | Share of elderlies who participated in healthy lifestyle programs during the last year |
| | 16 | Share of elderlies who had a medical checkup in last year |
| Social connection 16.7% | 17 | Elderly loneliness score |
| | 18 | Share of elderlies that consider him/herself as part of a certain community |
| Longevity programs 16.7% | 19 | Existence of elderly-dedicated community centers |
| | 20 | Availability of outreach and regular check-in services for elderlies |
| | 21 | Provision of elderly-friendly infrastructure in public spaces and facilities |
| | 22 | Survey: I am satisfied with the elderly-friendliness of infrastructure |
| | 23 | Access to lifelong learning and digital inclusion programs for seniors |
| | 24 | Implementation of social inclusion initiatives to reduce isolation and loneliness for elders |
| Afford-ability 16.7% | 25 | Nonfood price index |
| | 26 | Share of food expenses in total expenses |
| | 27 | Number of hours that a person needs to work to purchase 1 square meter of housing |
| | 28 | The share of the utilities costs in the average monthly disposable household income |
| | 29 | The average cost of renting a one-room apartment outside the city's downtown area in relation to the average monthly disposable income for a household |
| | 30 | My personal finances and income are sufficient to give me the lifestyle I expect (elders only) |

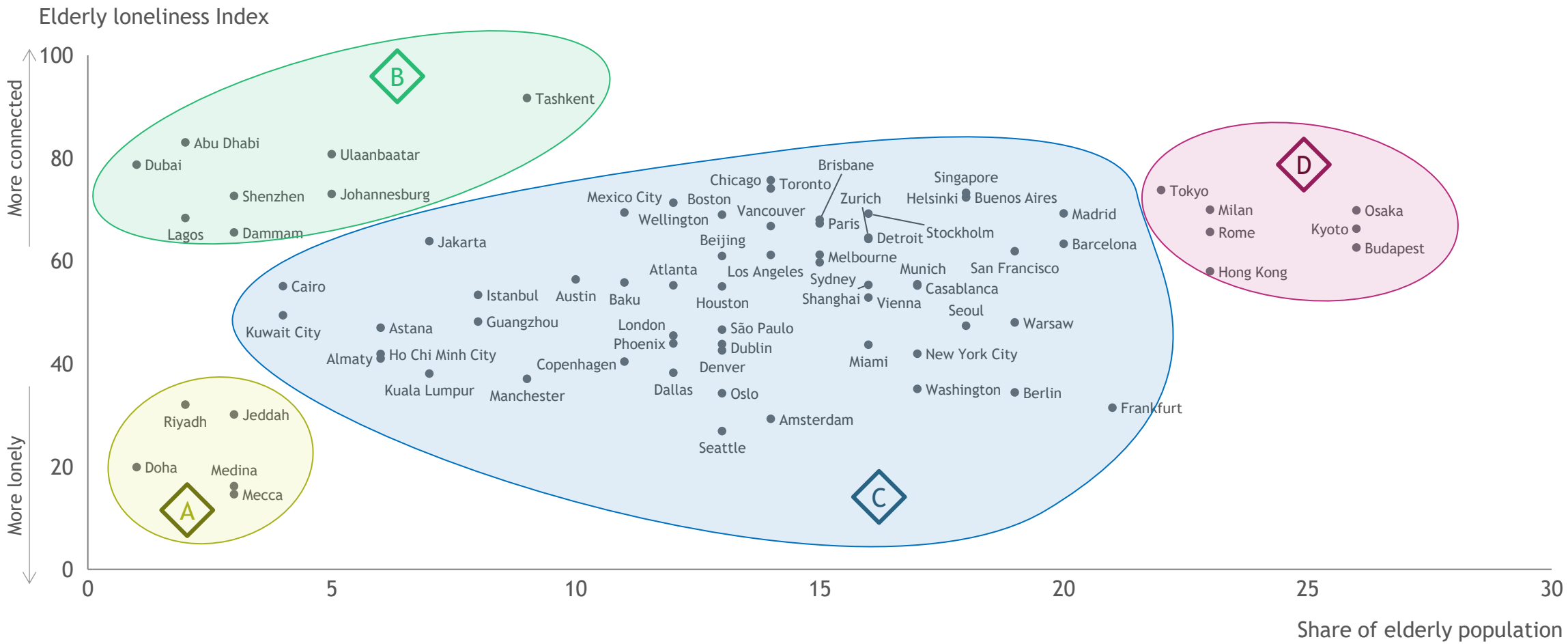
*Weight assigned*

Note: $O_3$ = ozone.

# While American, Oceanian, and European cities lead the healthy aging index, Asian and Middle Eastern cities lag behind

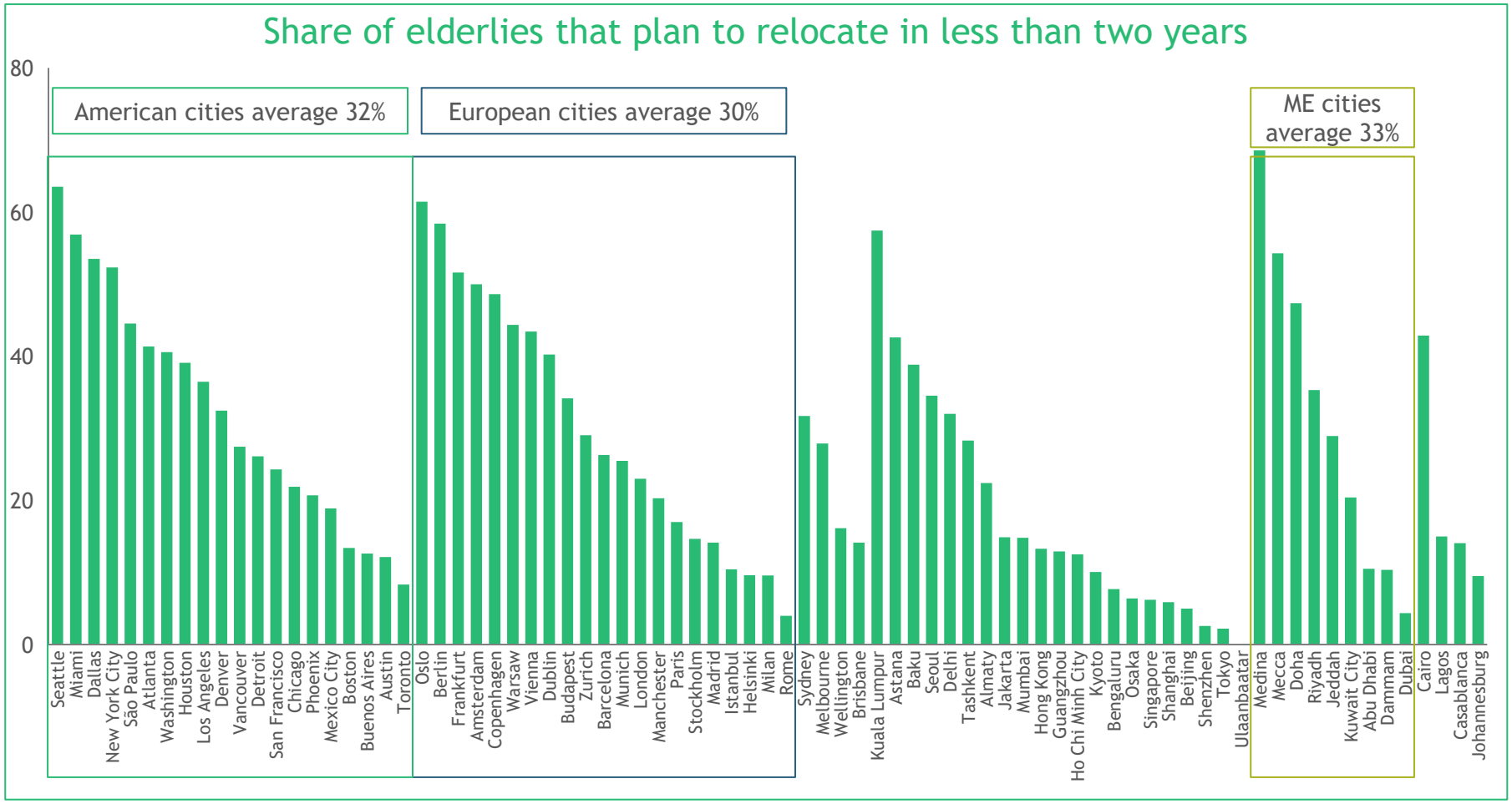


# Cities predominantly sit in archetype C, with a moderate elderly share and a medium loneliness index

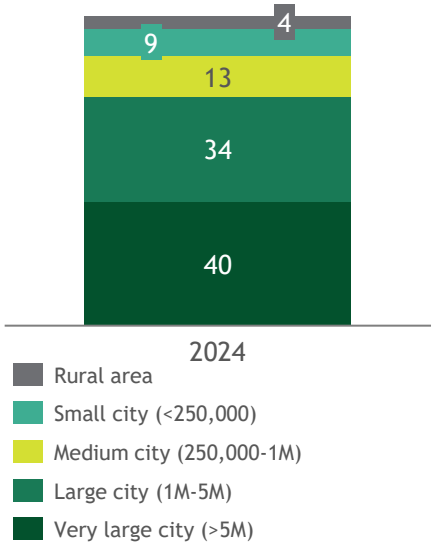


# Twenty-seven percent of respondents aged 60 or older want to move to other large cities

Largest share was recorded in cities where elderly feel more lonely



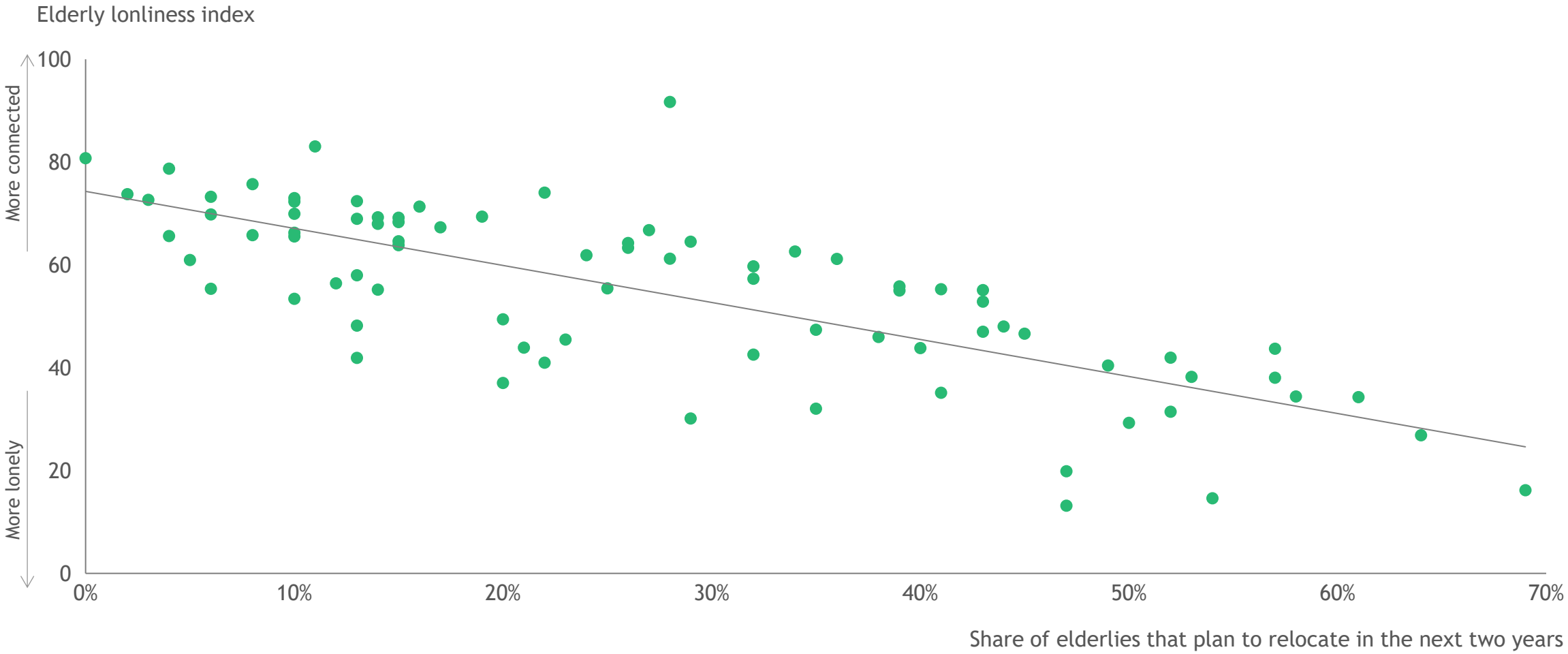

Where relocating seniors plan to move in the next two years




Elders prefer larger cities as:

- Larger cities provide more advanced, readily accessible health care
- Vibrant urban environments offer more social activities and communities

# Higher loneliness among seniors corresponds to a greater share of those planning to leave their city

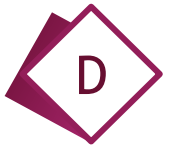


# All cities should prepare for aging populations by designing for connection, access, and care


## Less elderly, more lonely


## Less elderly, less lonely


## Moderately elderly, moderately lonely




## More elderly, moderately lonely

| | | | | |
|---|---|---|---|---|
| Implication | • Consider improving mobility and access so older adults can reach people and places easily<br>• Invest in programs that create frequent, low-friction social contact for seniors | • Protect what already works by funding community hubs and intergenerational activities<br>• Prepare for demographic shift by planning age-friendly infrastructure | • Remove participation barriers to community activities so moderate engagement becomes habitual<br>• Grow the supply and diversity of connection opportunities | • Leverage the large senior population to seed and scale neighborhood-based communities<br>• Invest in citywide age-friendly infrastructure so participation becomes effortless |
| Examples | Riyadh, Doha, Mecca | Dubai, Shenzhen, Ulaanbaatar | Sydney, London, Zurich, Shanghai | Hong Kong, Osaka, Rome |

# Longevity | Ensure age-friendly infrastructure, community care, and accessible services for seniors

| | |
|---|---|
| Upgrading existing residential neighborhoods to better accommodate elderly residents | Beijing installs elevators in older walk-up apartment buildings across various districts and incorporates accessibility upgrades like handrails and nonslip walkways<br>Kyoto offers subsidies for retrofitting traditional wooden houses (*machiya*) with senior-friendly amenities |
| Barrier-free public transit ensuring full accessibility for elderly passengers | Japan implements a nationwide policy requiring barrier-free public transportation; nearly all major train and subway stations in Japanese cities feature wheelchair access, elevators, ramps, and clear navigation systems<br>Seoul ensures all subway stations have elevators or escalators and that buses are fully wheelchair accessible |
| Designated elderly-friendly zones in urban areas with targeted safety measures | Singapore has created "Silver Zones," specially marked residential areas with lower speed limits, narrower lanes, and extended pedestrian crossing times<br>New York City implements the "Safe Streets for Seniors" initiative, where intersections have been redesigned with pedestrian islands, extended crossing signals, and improved signage in these identified neighborhoods |
| Regular services delivered directly to elderly at home | Cities including Beijing, Seoul, and Shanghai provide extensive home-based caregiving services, with trained professionals or volunteers regularly visiting elderly residents for personal care, medical assistance, or social interaction |

# Longevity | Involve the elderly population in social and economic activities

| | |
|---|---|
| Social activities and lifelong learning programs that allow elderlies to remain socially engaged, physically active, and mentally stimulated | Hong Kong operates the "Elder Academy," enabling seniors to participate in educational courses at schools and universities, facilitating continuous learning and social integration<br>New York City provides extensive senior center programs, including wellness activities, arts and technology classes, and social clubs, promoting an active, connected lifestyle for elderly residents |
| Intergenerational support programs that reduce isolation and foster mutual aid | Tokyo operates innovative home-sharing programs where university students that need affordable housing live with elderly residents, offering companionship while addressing housing need |
| Elderly-focused neighborhoods providing essentials within close proximity | Shanghai has created "15-minute Elderly Care Service Circles," ensuring seniors can access essential health care, social services, and community activities within a short walking distance from their homes<br>Singapore developed "Kampung Admiralty," an integrated residential complex that combines senior-friendly housing with health care facilities, retail spaces, parks, and community services |
| Policies providing financial or service support to individuals caring for elderly family members | Singapore provides the "Caregiver Support Grant," offering financial assistance directly to families caring for elderly relatives with moderate to severe disabilities<br>Tokyo offers tax deductions and subsidies for families employing professional caregivers |

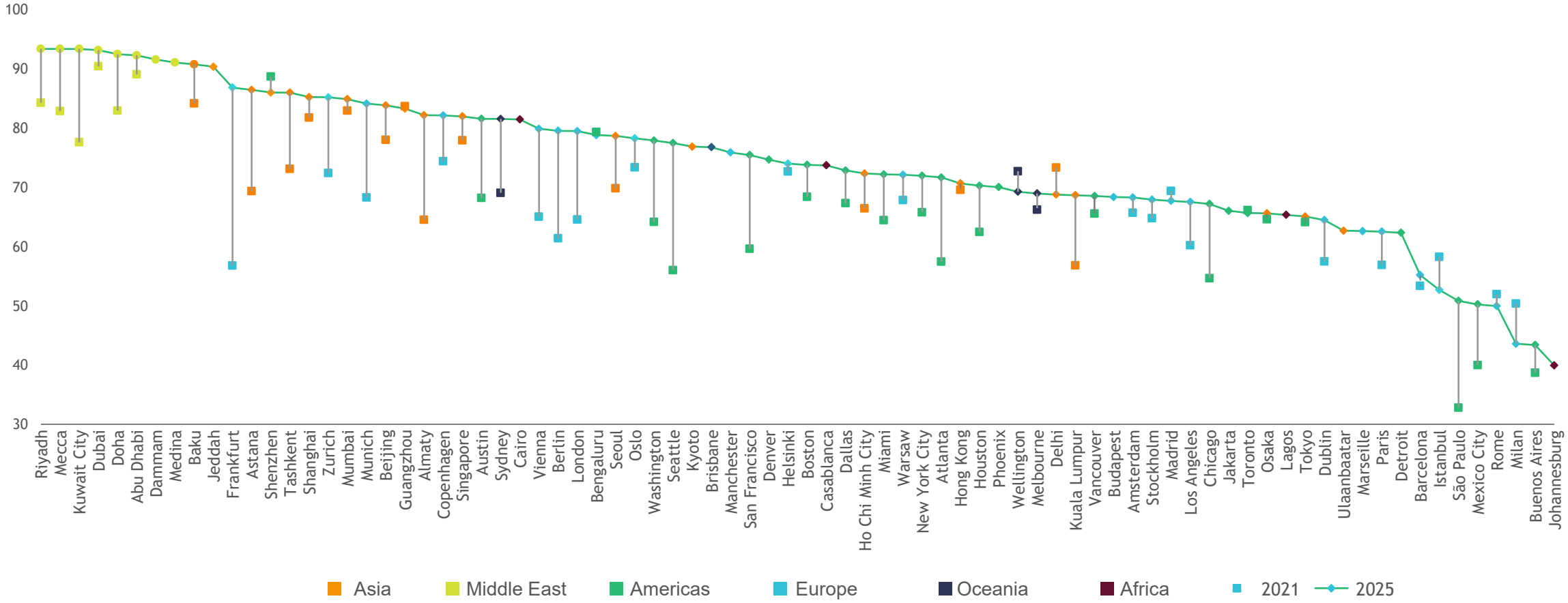
Theme 6

# Safety and resilience

Lower societal trust, climate disruptions, and high-profile acts of terror are increasing resilience and safety concerns in cities

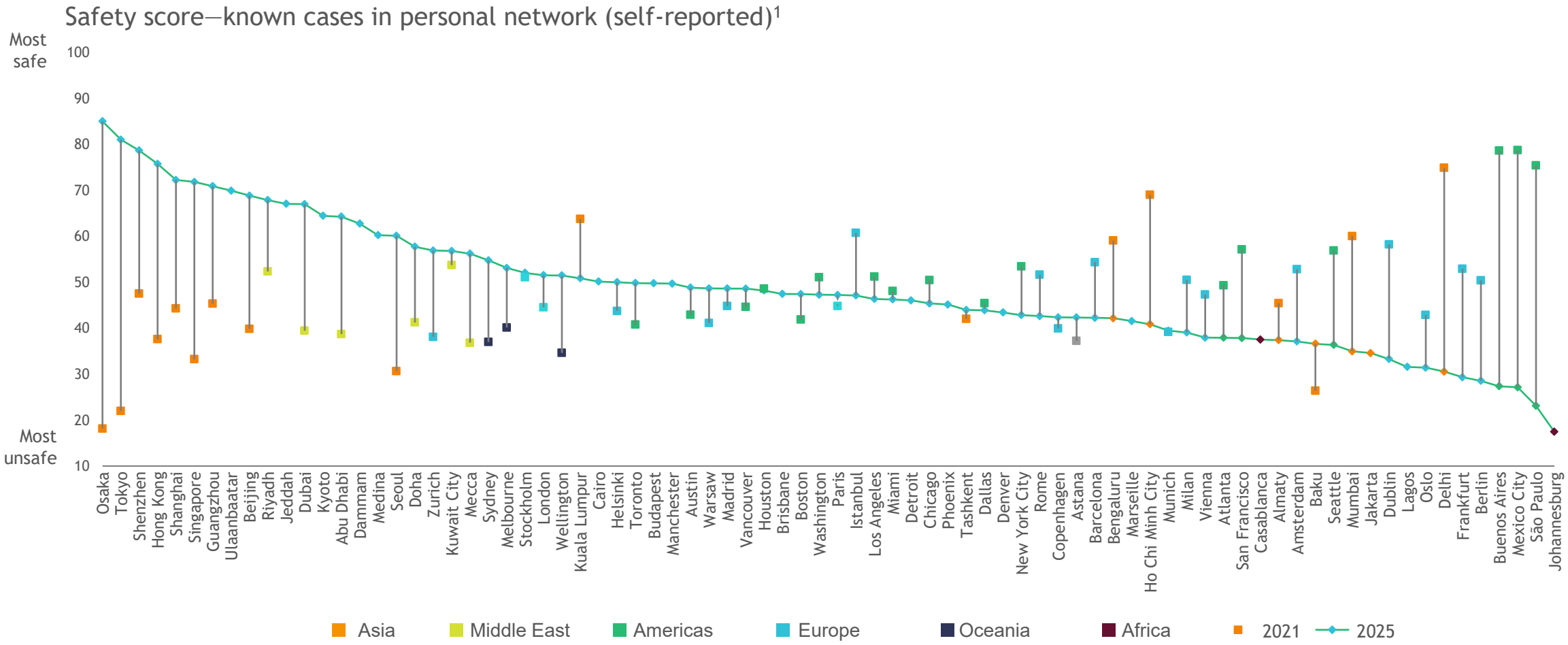
# Overall, residents report feeling safer than they did in 2021, with ME and Asian cities continuing to lead in perceived safety

Perceived safety score (self-reported)[1]




1. Based on survey question: To what extent do you agree with the statement “I feel safe in the city”?

# Known crime cases show mixed trends—Asian and ME cities remain the safest, while South American cities have worsened notably




1. Based on survey question: Do you know of any cases when you or anyone you know personally got physically attacked or robbed, insulted or pestered while in the public space or at home?

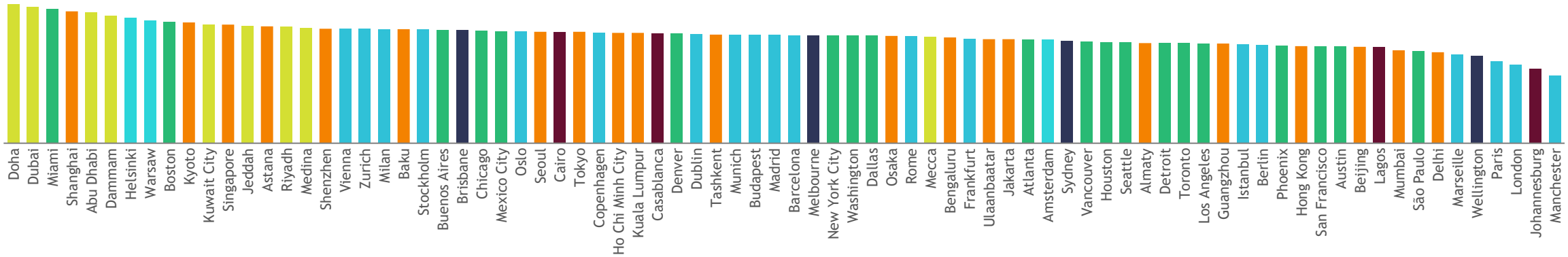
# Safety and resilience indicators organized by objective and subjective metrics

| Layer 1 | Group | Indicator |
|---|---|---|
| Objective indicators | Safety | 1 Murders per year per 100,000 population |
| | | 2 Violent crimes - kidnapping per 100,000 |
| | | 3 Violent crimes - serious assault per 100,000 |
| | | 4 Street lighting |
| | | 5 Number of CCTV cameras within city area |
| | Resilience | 6 Number of victims of terrorist attacks in the last 10 years per 100,000 population |
| | | 7 Number of deaths from terrorist attacks in the last 10 years per 100,000 population |
| | | 8 Number of deaths from natural disasters in the last 10 years per 100,000 population |
| | | 9 Level of exposure to natural disasters and estimated potential impact of natural disasters (index) |
| | | 10 Number of intensive care beds per 100,000 population |
| | | 11 Resilience strategy (incl. sustainability, to extreme natural disasters, terrorism/war) in place |
| | | 12 Number of emergency service personnel per 100,000 population |

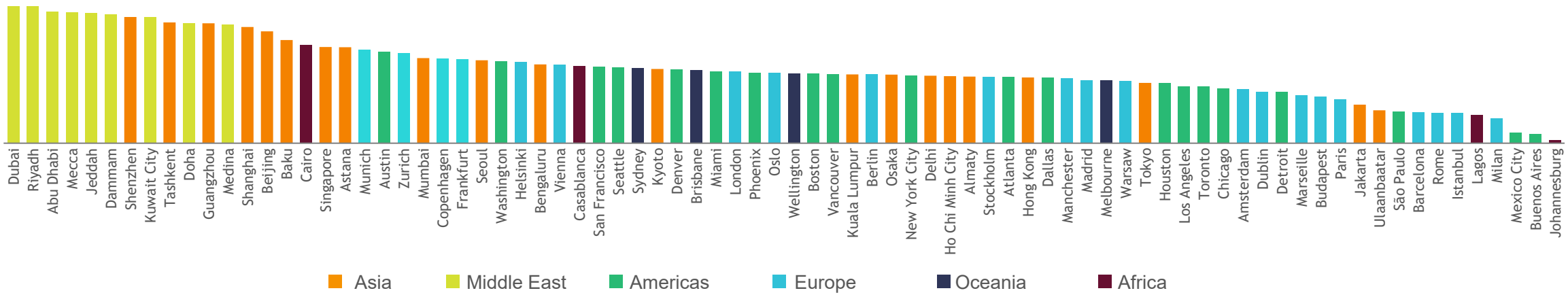
| Layer 2 | Group | Indicator |
|---|---|---|
| Subjective indicators | Safety | 14 Do you know of situation when someone whom you know personally was physically assaulted or robbed, insulted or molested in a public place or at home? |
| | | 15 Generally, I feel safe in the city |
| | | 16 How much you worry about being physically attacked or robbed while in a public space |
| | | 17 How much you worry about being insulted or pestered while in a public space |
| | | 18 How much you worry about your personal belongings being stolen |
| | Resilience | 19 I trust the police in the city |
| | | 20 I trust the courts of the city |
| | | 21 I trust the city mayor and his/her team |
| | | 22 I trust the leader of country and his/her team |

# While subjective and objective measures show some variation, ME and Asian cities maintain leading positions in safety and resilience

Objective safety and resilience city subranking score (0-100)




Subjective safety and resilience city subranking score (0-100)



# In some cities, residents trust city leaders more than national ones, stemming from underperforming national authorities or more responsive local leadership

## Top 15 cities with the largest positive gap in trust for city mayor vs. country leader


## Drivers behind higher trust in city leadership

**Istanbul**

Istanbul's local government is responsive and visible in addressing daily urban issues (transport, infrastructure, etc.), while national government is perceived as distant

**Budapest**

Municipal leaders remain close to residents' urban realities and service delivery, whereas the national government faces fiscal and political challenges that weaken overall trust

**Japanese cities**

Local governments focus on improving public services, livability, and city branding, making them more relevant to daily life; national institutions, though stable, feel less immediately connected to citizens

**Lagos**

Widespread distrust in national institutions, politics, and governance elevates relative confidence in city leadership

**Madrid**

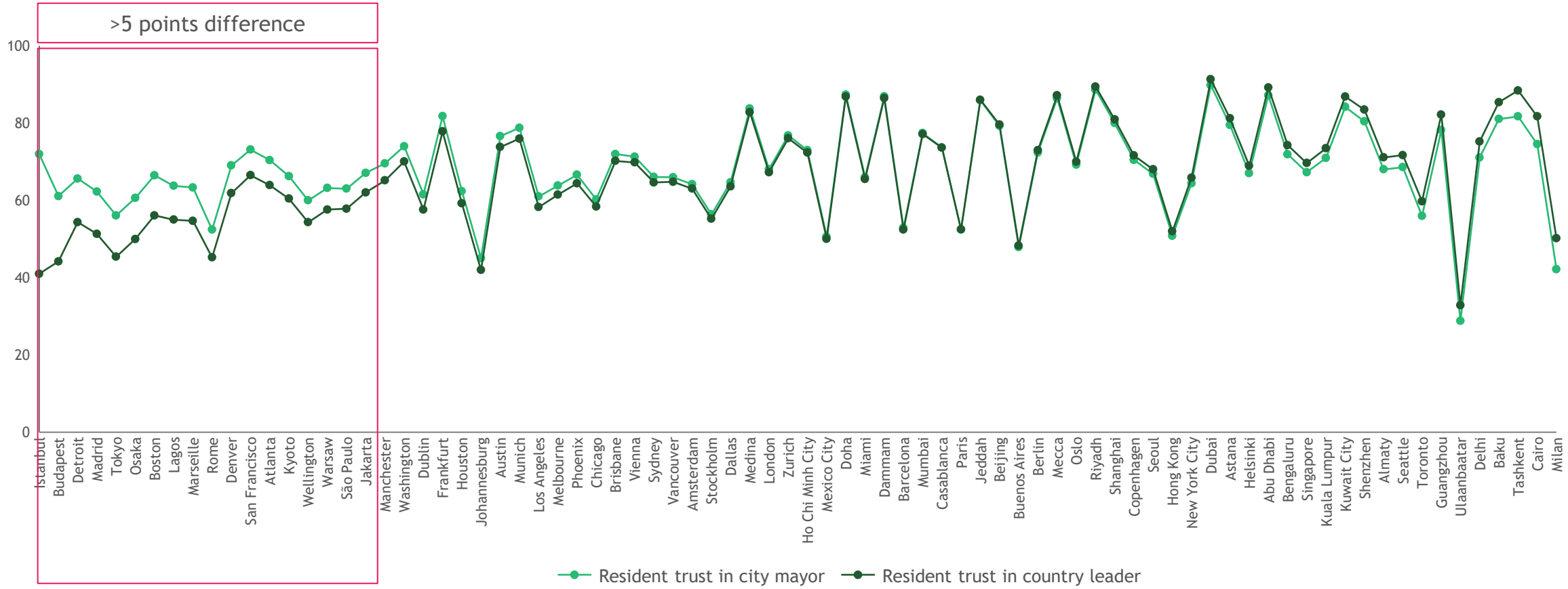
While Spain's governance is rather decentralized, Madrid has ongoing citizen engagement platforms like *Decide Madrid* that encourages engagement and reinforces trust in local authority

Note: The share of residents who trust the city mayor and the share of residents who trust the country leader are based on the Cities of Choice Survey.
Residents who provided positive responses are counted as trusting.

# Across global cities, trust in city mayors tends to move in line with trust in national leaders, although ME and Asian cities exhibit higher overall trust

# Residents in Istanbul, Budapest, and Detroit trust their city mayor significantly more than their country leader

Japanese cities and a number of US cities also demonstrate stronger trust in city mayor compared with country leader




Note: Resident trust in city mayor and resident trust in country leader are measured through Cities of Choice Survey. The results are converted to a score (0-100), where 100 indicates the highest level of trust.

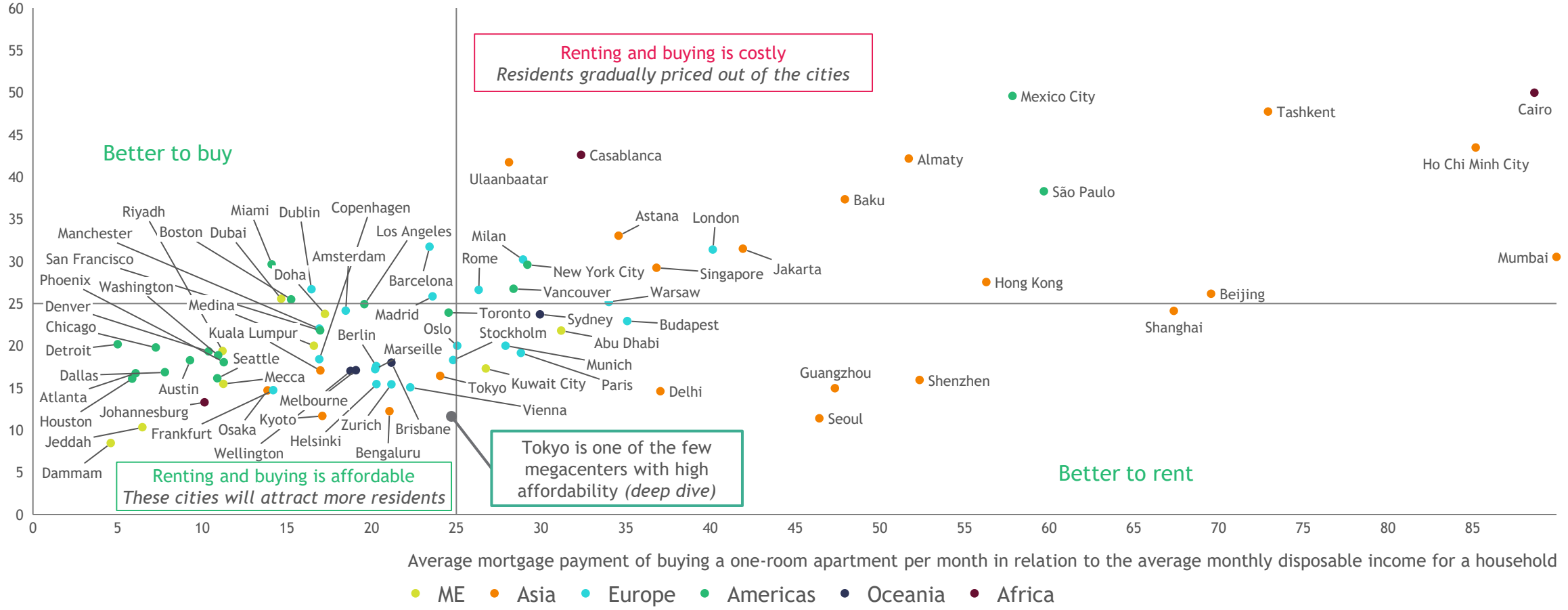
Theme 7

# Housing affordability

Housing markets have become deeply unaffordable, largely because supply has not kept up with demand

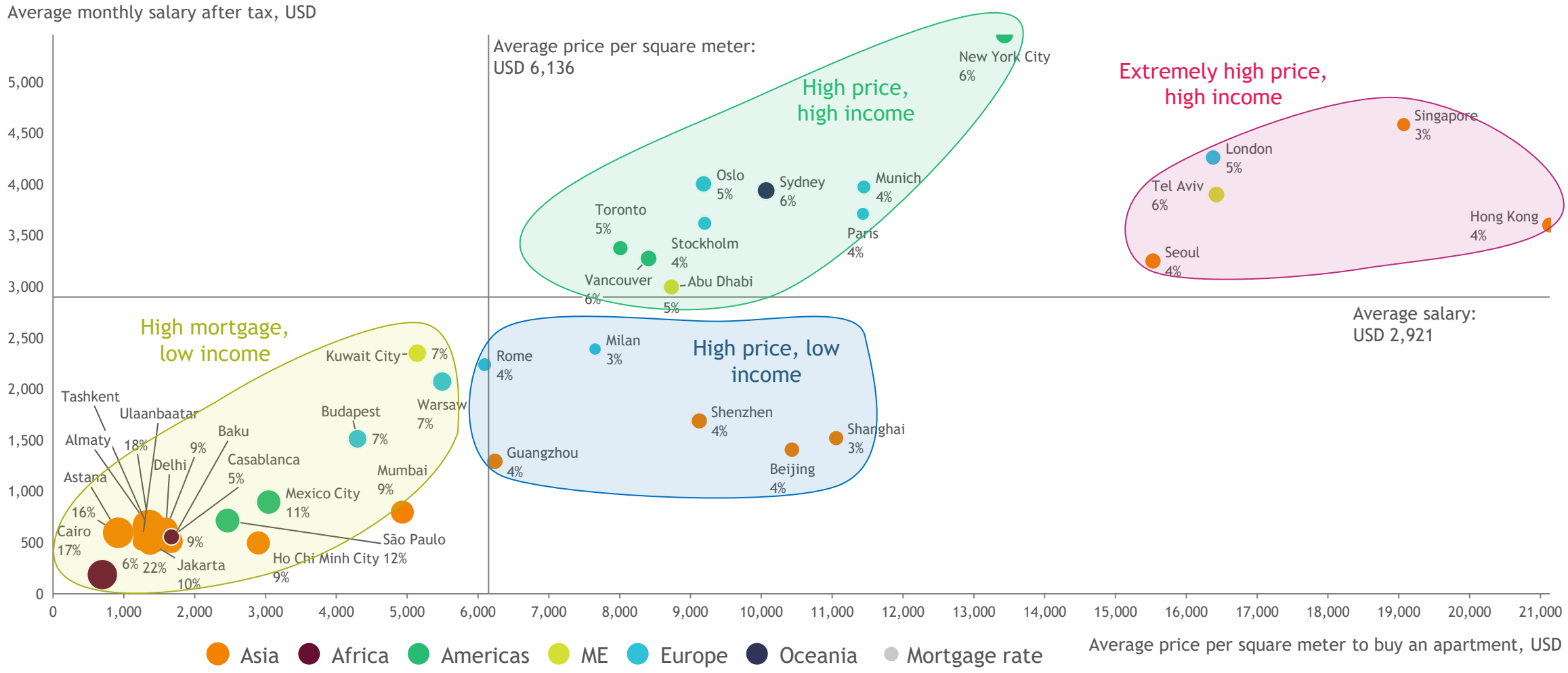
# Renting is more affordable in many major Asian cities, while Middle Eastern and many American cities show higher overall housing affordability

The average cost of renting a one-room apartment in relation to the average monthly disposable income for a household




Note: One-room apartment assumed at 40 square meters; monthly disposable income proxied as 2x average after-tax salary. Source: Numbeo, BCG analysis.

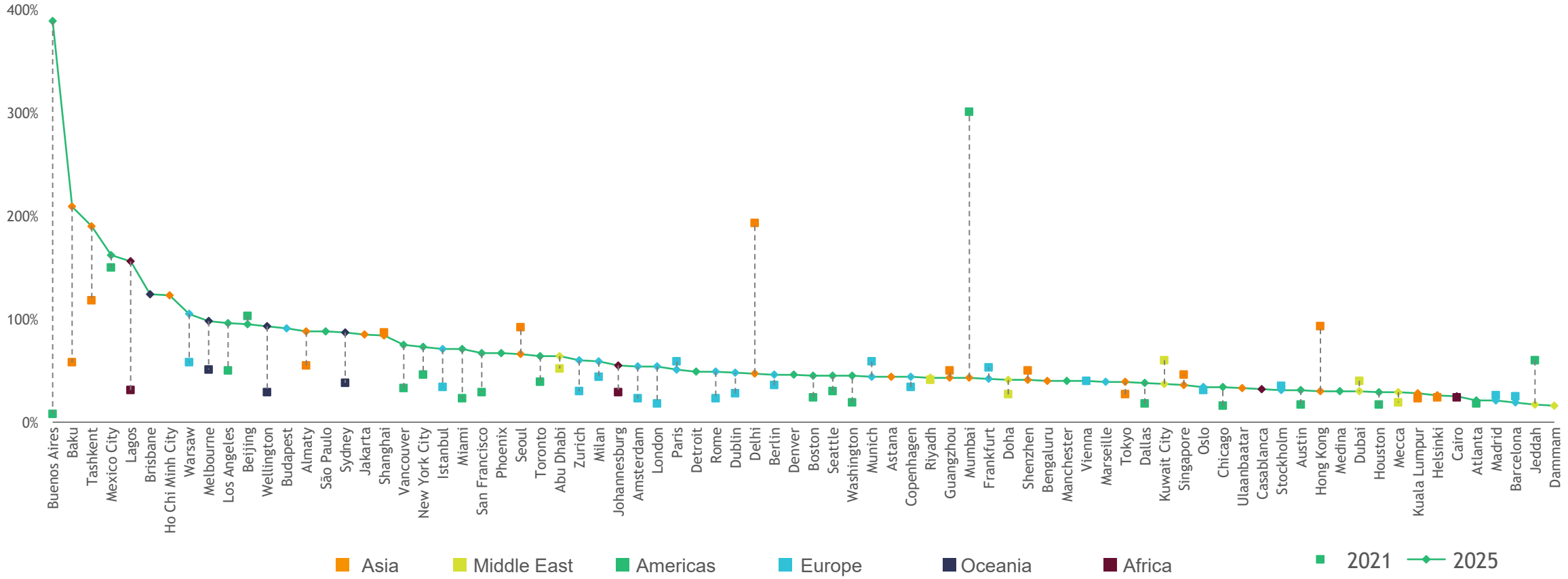
# For the 36 cities with mortgages above 25% of salary, we classified them into four groups based on salary, home prices, and mortgage rates




Note: The average price per square meter and average salary are calculated using our data set of 80 cities. Source: Numbeo, BCG analysis.

# The average share of mortgage payments relative to household disposable income increased from 48% in 2021 to 64% in 2025

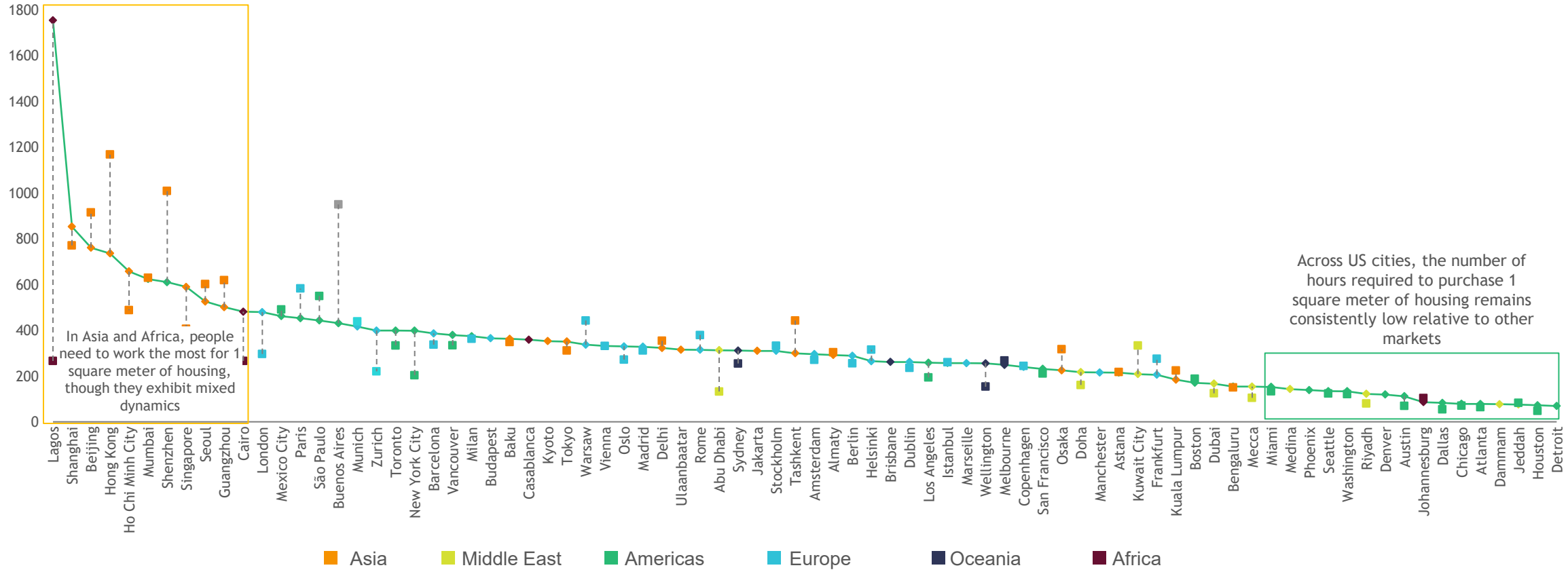
## Average mortgage payment relative to average monthly household disposable income[1]




1. Monthly mortgage payment estimated using average price per square meter, assumed square meter per person and average household size, prevailing mortgage rate, 20% down payment, and a 20-year mortgage term. The resulting monthly payment is divided by average monthly household disposable income to derive the percentage. Source: Numbeo, BCG analysis.

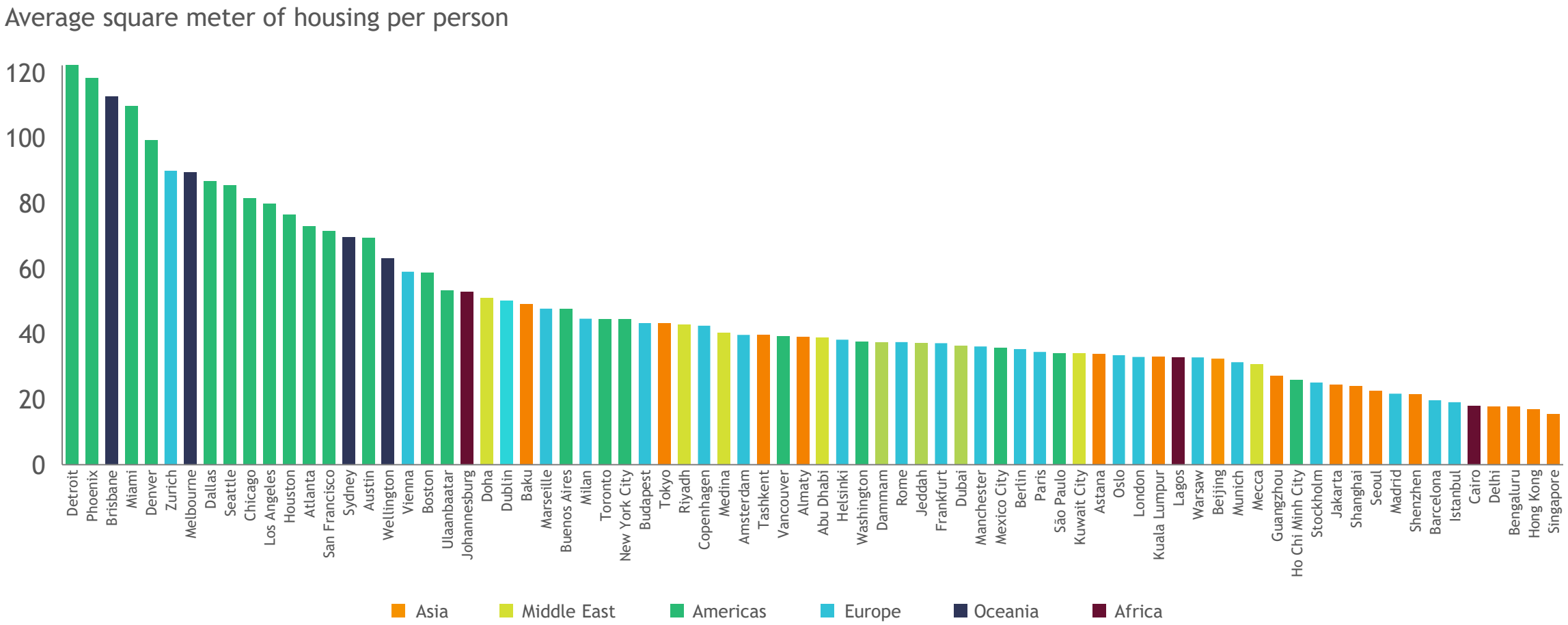
# The average number of hours that a person needs to work to purchase 1 square meter of housing increased from 326 hours in 2021 to 342 hours in 2025

## The number of hours that a person needs to work to purchase of 1 square meter of housing[1]




1. Indicator calculated by dividing the average price per square meter of housing by the implied hourly wage, derived from average monthly income assuming eight working hours per day and 21 working days per month.
Source: Numbeo, BCG calculation.

# Cities in North America and Oceania exhibit the highest average square meter of housing per person, whereas Asian cities consistently rank lower

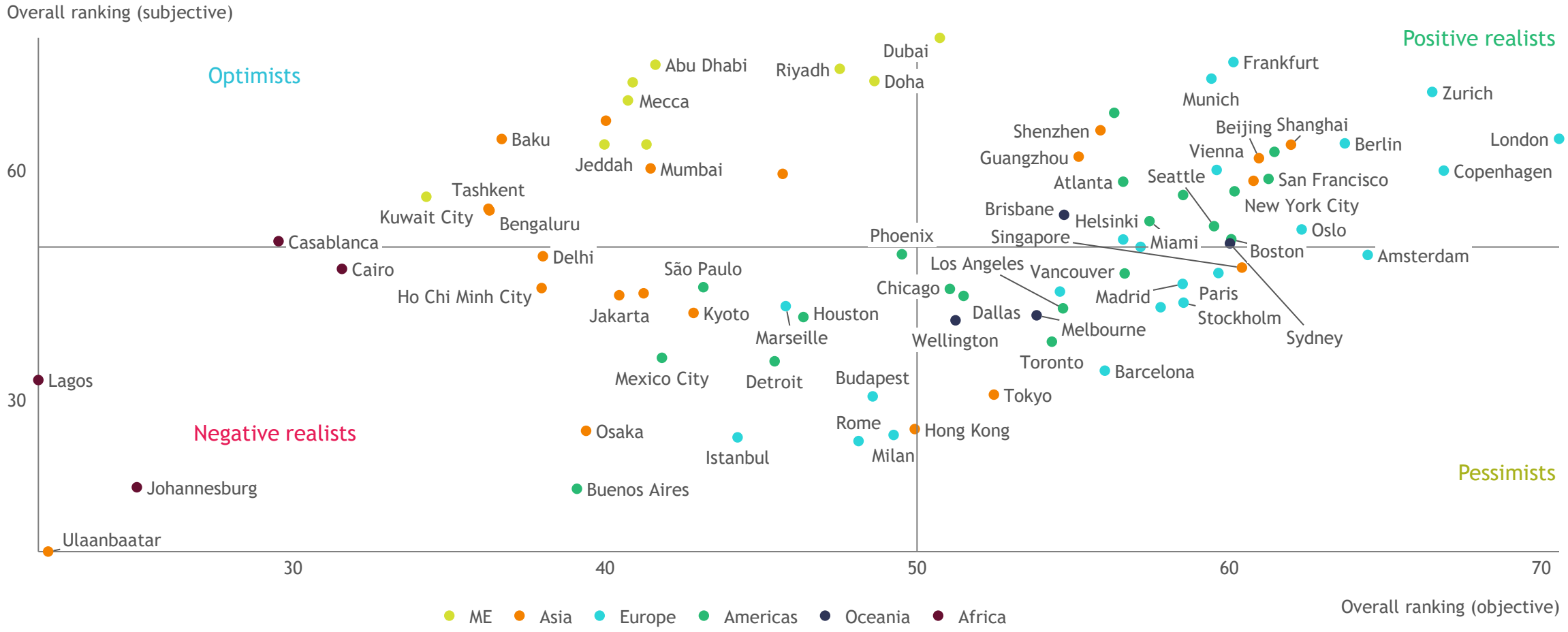


Theme 8

# Subjective and objective in cities

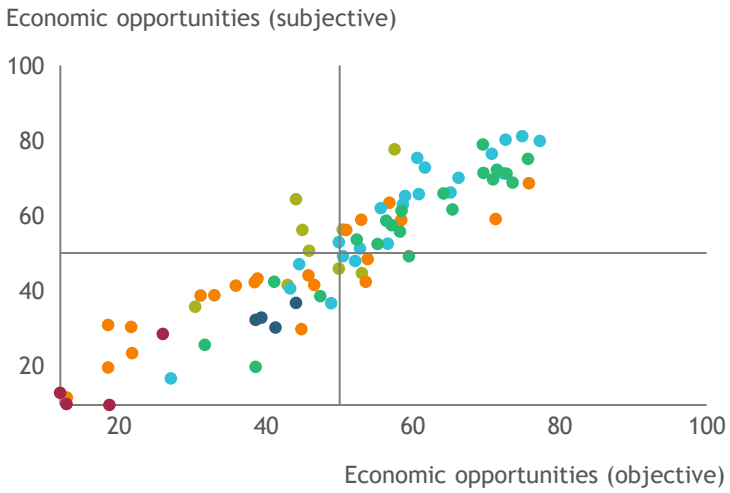
Objective reality in cities and subjective perceptions of residents do not always match

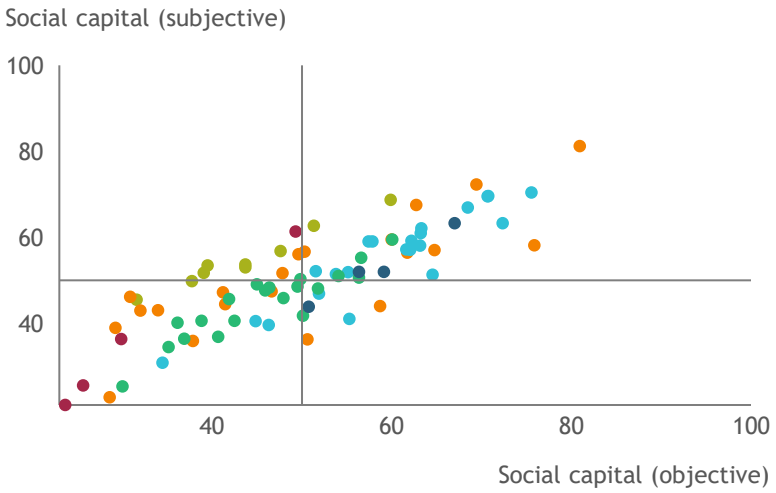
# Overall ranking | Middle East and part of Asia is more optimistic, while parts of Europe is more pessimistic across the overall ranking

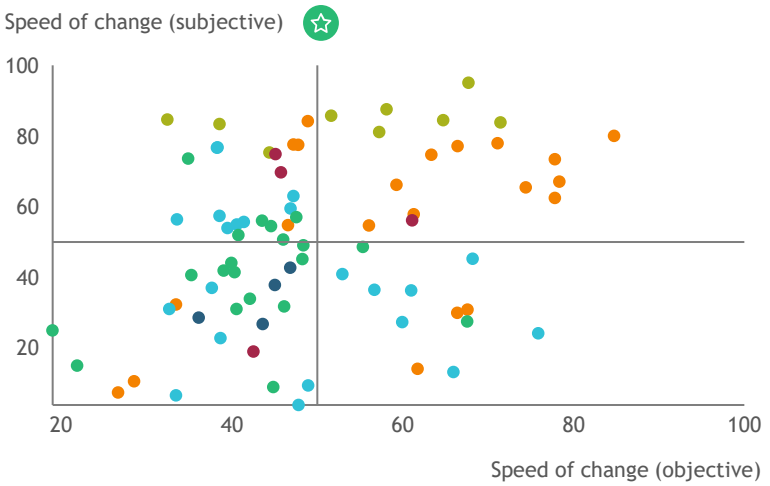


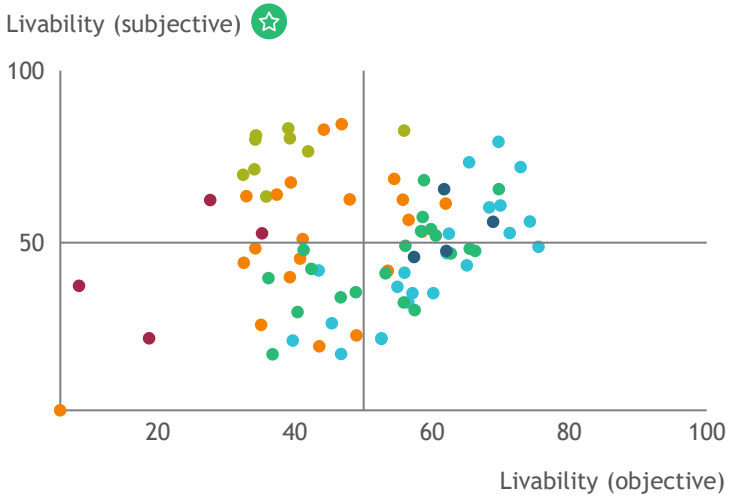

Note: Objective-data-based indicators or self-reported behavioral survey questions; subjective-opinion-based survey questions.

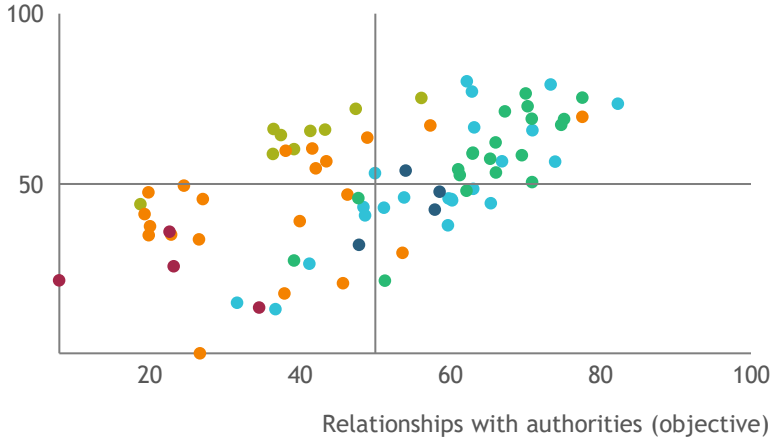
# Dimensions | Overall sentiment differs from the objective reality mainly in livability and speed of change



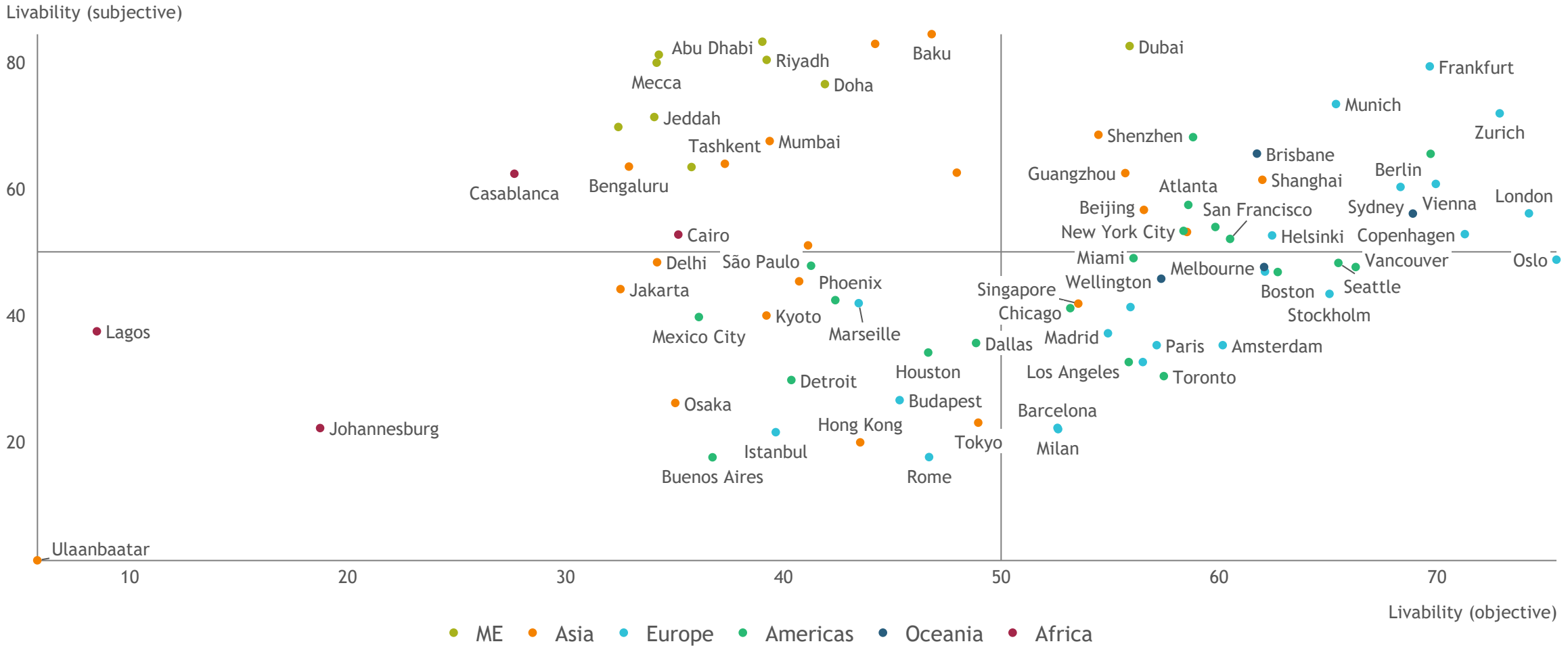



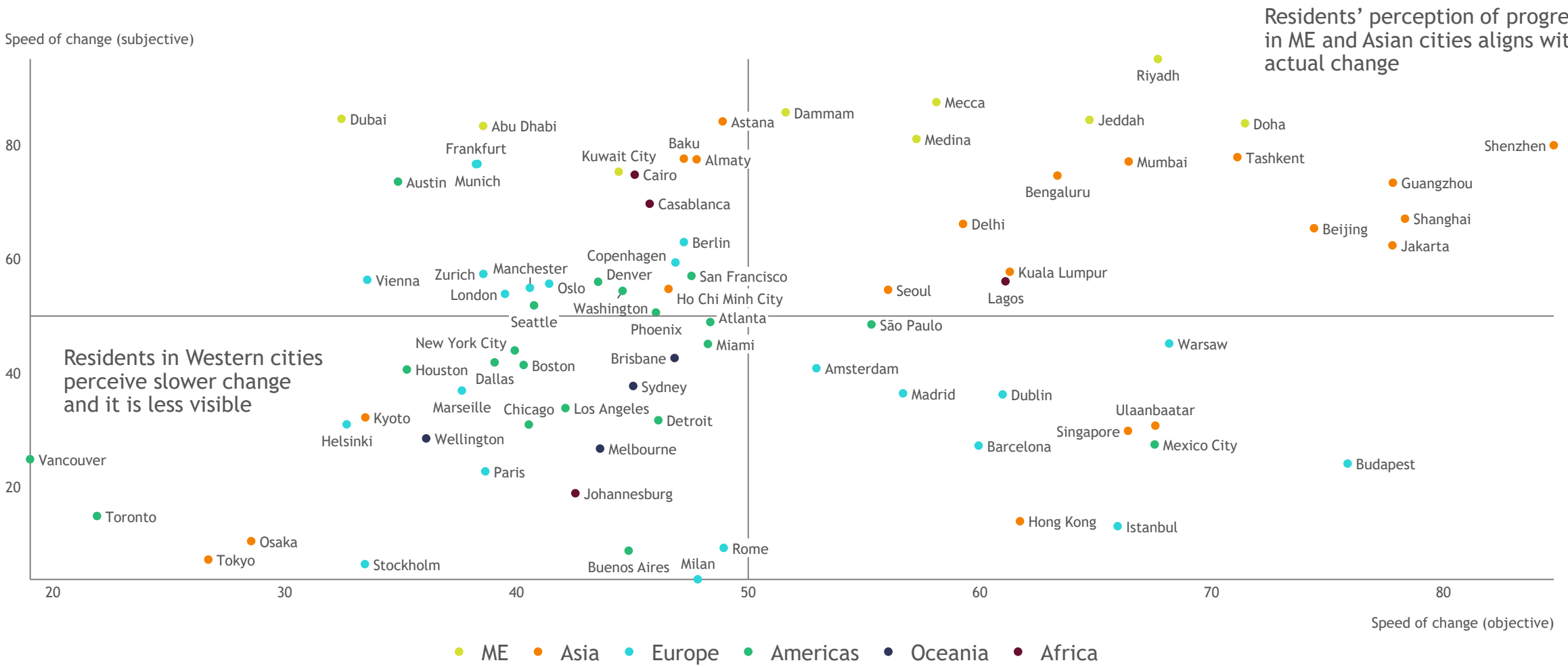




ME
Europe
Oceania
Asia
Americas
Africa
Explored further

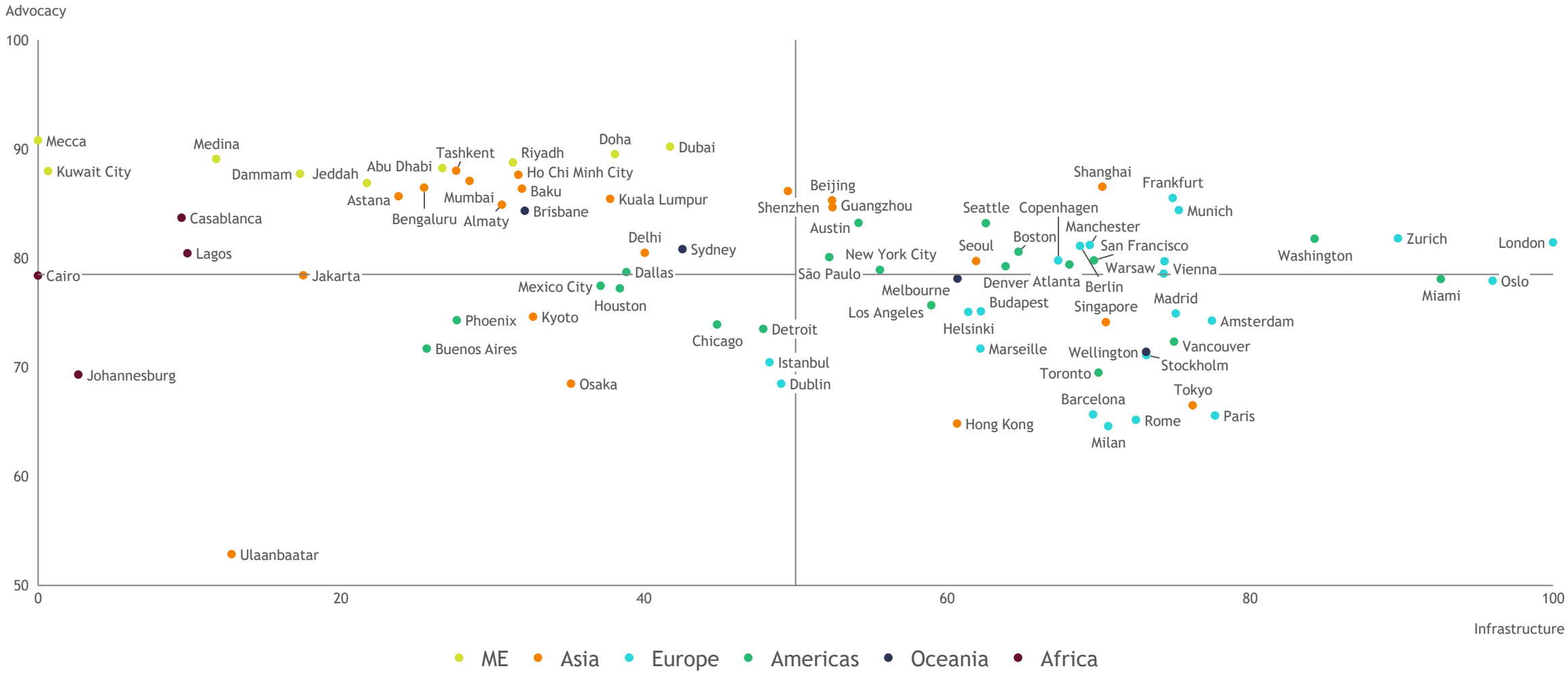
# Livability | Residents are generally satisfied in the Middle East and parts of Asia, although objective metrics perform lower



# Speed of change | Perceived vs. actual speed of change diverges by region—ME and Asian cities show aligned momentum



# Infrastructure and advocacy | Developed cities excel in infrastructure but not pride, while emerging cities inspire pride despite weaker systems

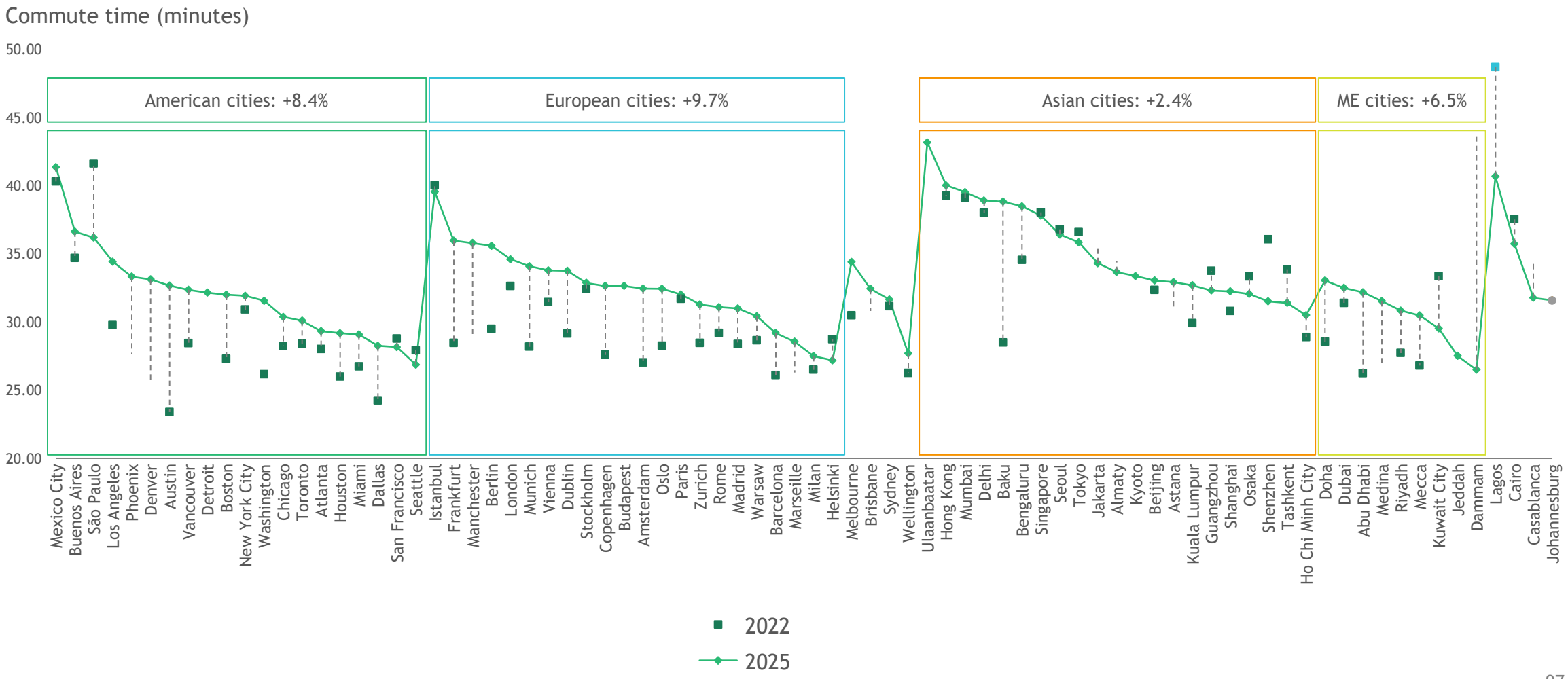


Theme 9

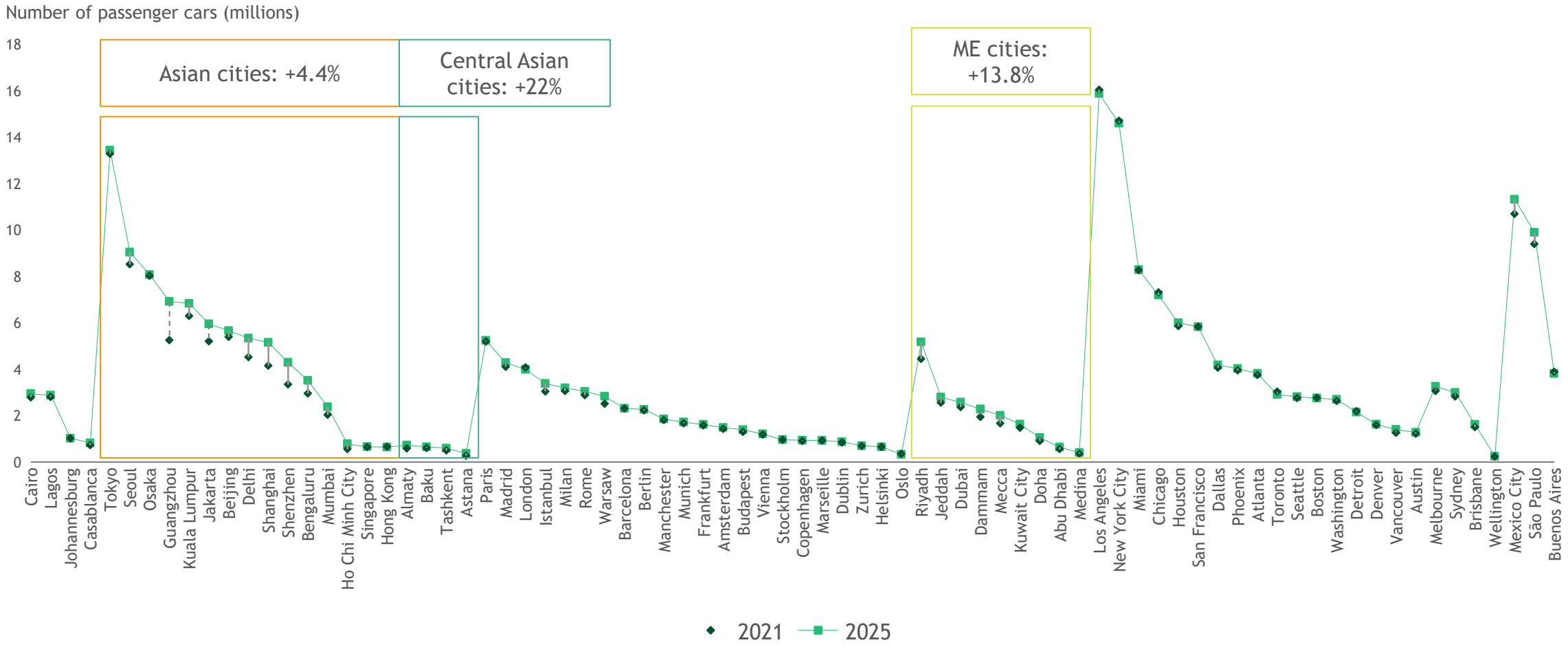
# Congestion and commuting time

Congestion and long commute times are rising steadily in large cities

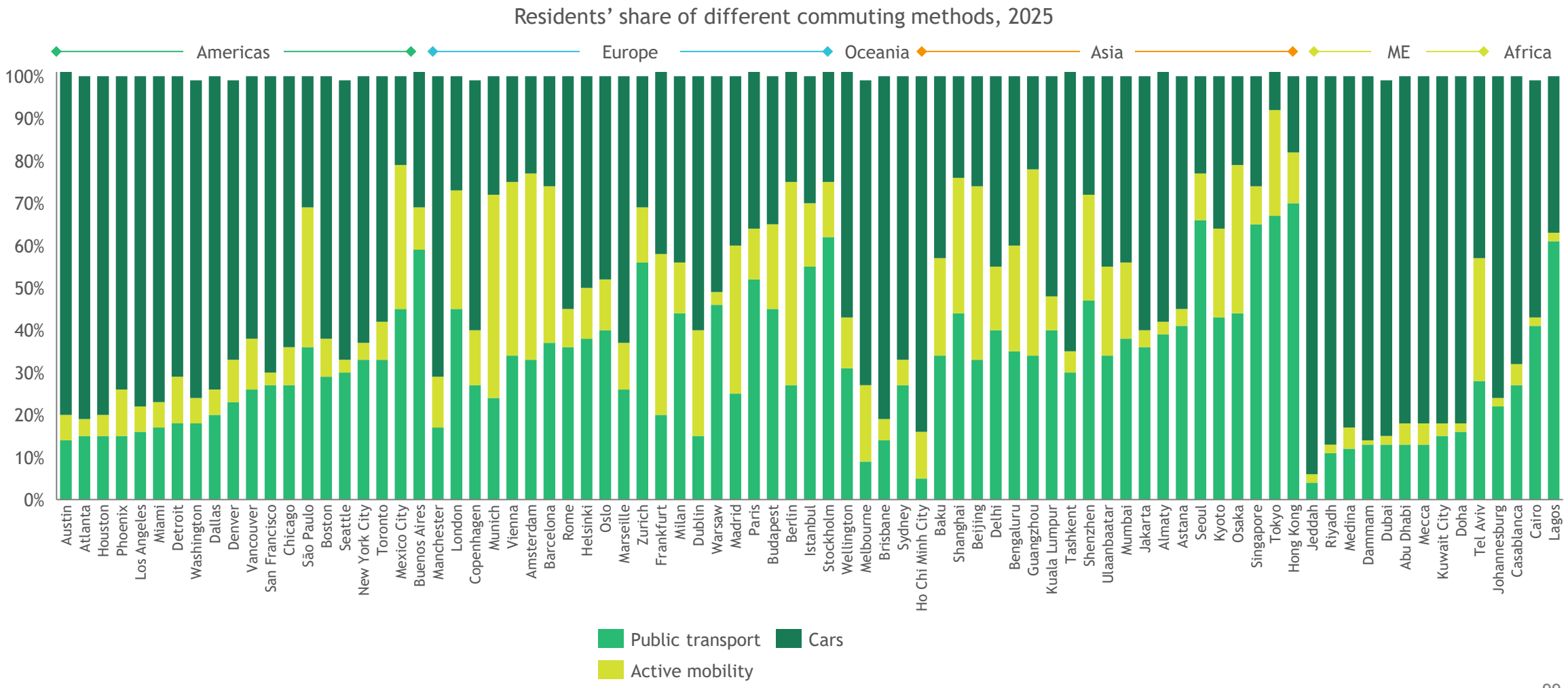
# Average commute time has risen by 6% since the last edition, possibly because of slower commuting speeds on public transport and more cars coming to cities



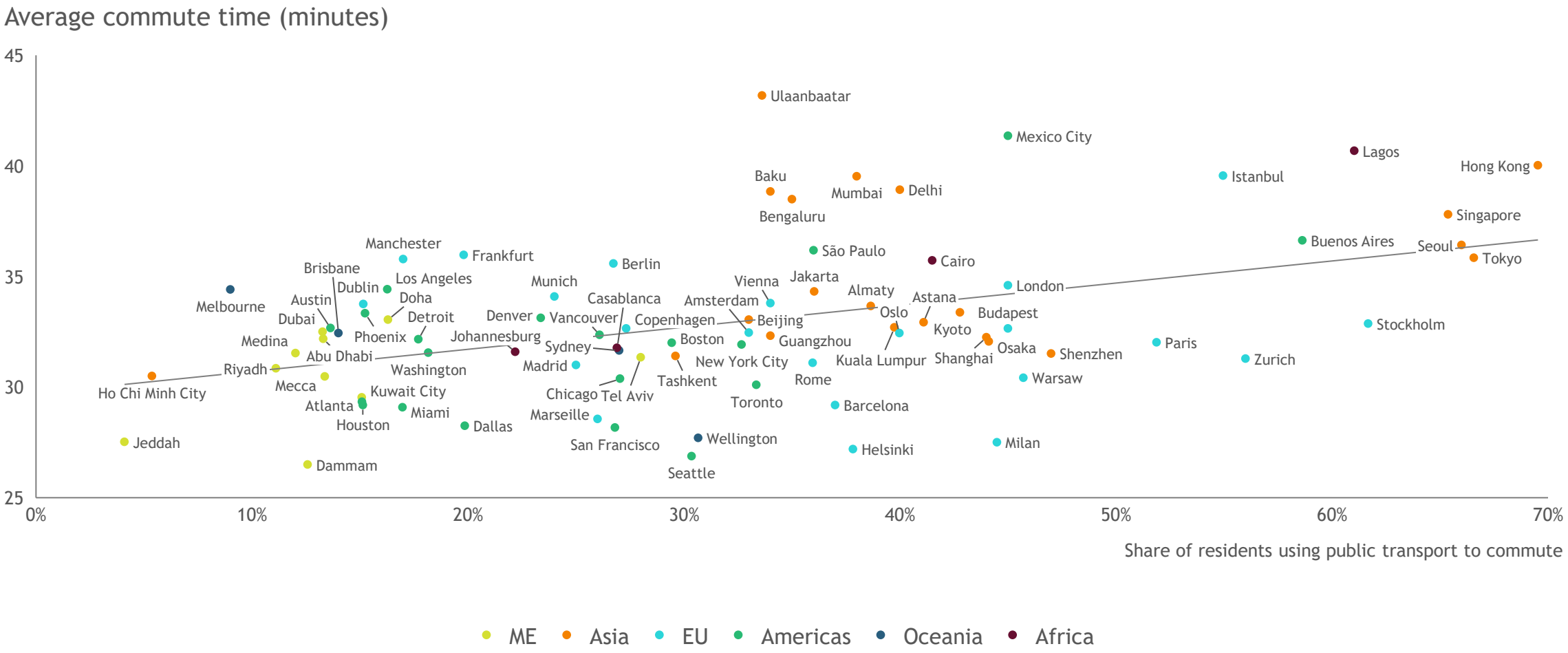
# The number of cars has increased by 7.5%, on average, since 2021, driven by Asian and ME cities, with Central Asian cities showing the biggest growth of 22%



# Residents of Middle Eastern and American cities still rely primarily on private cars for commuting



# Residents' usage of public transport correlates with the increased time to commute



Theme 10

# The connected city

The 15-minute city index is emerging as a key driver of urban livability and competitiveness

# Our connected-city index was inspired by the 15-minute city concept, which was reinterpreted by various other cities using different approaches

| | |
|---|---|
| 20-minute city |  ☆ Dubai<br>  ☆ Singapore |
| 15-minute city |  • Paris |
| 10-minute city |  ☆ Melbourne |
| 5-minute city |  • Vienna |
| 1-minute city |  ☆ Stockholm |

> "Within the distance of a 15-minute walk or bike ride, people should be able to live the essence of what constitutes the urban experience."
> — Carlos Moreno, advisor to Paris's 15-minute city plan

> "The 20-minute neighborhood concept is all about creating walkable, healthy, cohesive, sustainable communities with strong local economies."
> — Richard Wynne (former Minister for Planning and Housing, Australia)

> "So our idea is you need to be able to access everything within five minutes, walk, get out of your front door, go walk around the corner and you find everything."
> — Expert interview

## Key takeaways

- Concept typically applied at the neighborhood level
- Proximity (e.g., five minutes) to essential services is defined by walking distance
- Accessibility to services are enhanced by micromobility (e.g., bikes)

☆ Planning or early implementation stage

Source: Expert interviews; press search; BCG analysis.

# Cities that embrace the 15-minute city have already achieved measurable improvements in livability

| Outcomes | Global examples |
| --- | --- |
| Reduced car use and traffic | Paris halved car mode share to ~6% of trips; traffic volumes fell ~50% in 20 years<br>Vienna reduced car trips to ~25% of journeys, with a target of 20% by 2025 |
| Growth in sustainable travel | Paris now records ~1 million bike trips daily (+166% since 2018)<br>Vienna: 75% of trips made by sustainable modes (public transit, walking, cycling) |
| Reclaimed public space | Paris converted 3.3 kilometers of Seine expressway into a car-free park; 200+ school streets pedestrianized |
| Cleaner environment | Paris air pollution improved: $NO_2$ declined 50%, $PM_{2.5}$ declined 55% (2005–2024) |
| Resident satisfaction | 97% of Viennese express satisfaction with city life; transit satisfaction among the highest in Europe |

Source: Tools of Change, Paris Car Reduction Case Study (2023); Vienna Mobility Report (2019), Stadt Wien; El País, Cycling Revolution in Paris (2024); City of Paris, Les Berges de Seine Redevelopment; City of Vienna, Supergrätzl Favoriten Pilot (2022); AirParif, Air Quality in Île-de-France (2024); City of Vienna Urban Development Report (2021); EU Quality of Life in Cities Survey (2015).

# We employed a three-layer approach to evaluate the connected-city index

## Layer 1 – Availability of assets

**Are the essential services and amenities dense to create a basis for 15-minute city?** Weight 40%

We assessed the number of services and amenities present in the city, grouped by frequency of use

| | |
|---|---|
| 50% | Daily needs (e.g., groceries) |
| 25% | Weekly needs (e.g., retail space) |
| 25% | Less frequent needs (e.g., hospitals) |

## Layer 2 – Accessibility

**How easily can residents reach and use these amenities?** Weight 40%

Beyond presence, we evaluated how easily residents can reach and use these assets

| | |
|---|---|
| 95% | **Accessibility and walkability**<br>Accounting for elements such as micromobility, convenient access to work |
| 5% | **Comfort climate**<br>Accounting for climate conditions that shape outdoor accessibility |

## Layer 3 – Underlying conditions

**Does the land use support connectivity?** Weight 20%

Share of economic land use

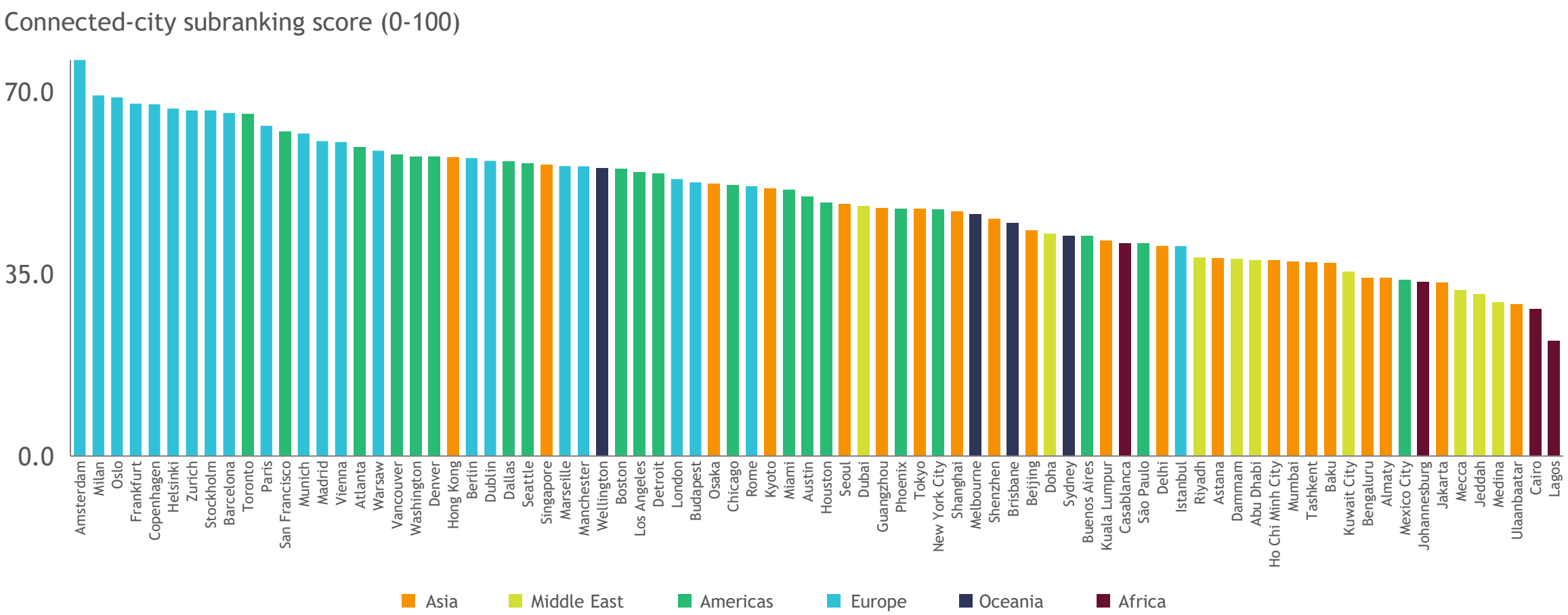
# The connected-city indicators' classification and weighting

| Layer 1 | Group | Indicator – 40% |
|---|---|---|
| Availability of asset | Group 1 (daily) 50% | 1 Number of children's playgrounds per 100,000 population |
| | | 2 Number restaurants per 100,000 population |
| | | 3 Number of fitness centers and swimming pools per 100,000 population |
| | | 4 Number of coworking spaces per 100,000 population |
| | | 5 Density of metro stations |
| | Group 2 (weekly) 25% | 6 Square meters of retail space per 100,000 population |
| | | 7 Number of points of sale per 100,000 population |
| | | 8 Number of local farmers' markets with the opportunity to buy fresh food, per 100,000 population |
| | Group 3 (less frequently than weekly) 25% | 9 Number of museums per 100,000 population |
| | | 10 Number of theaters per 100,000 population |
| | | 11 Number of cinemas per 100,000 population |
| | | 12 Number of libraries per 100,000 population |
| | | 13 Number of hospitals per 100,000 population |

| Layer 2 | Group | Indicator – 40% |
|---|---|---|
| Acces-sibility | Walkability 95% | 14 Average time (minutes) lost in traffic jams per resident |
| | | 15 Time to commute from home to place of work or study (survey) |
| | | 16 Share of population that has convenient access to public transport |
| | | 17 Presence of infrastructure for velo transport |
| | | 18 Frequency of micromobility trips per person |
| | | 19 Share of residents using bicycle, e-bike, scooter, skateboard for commuting from home to work or study |
| | | 20 Share of residents walking for commuting from home to work or study |
| | | 21 Share of population living within convenient walking distance to open public space |
| | | 22 Walkability score |
| | Comfort climate 5% | 23 Number of months with a comfortable daytime temperature |

| Layer 3 20% | |
|---|---|
| | 24 Economic land use score |

# Amsterdam ranks top among 80 cities, whereas Ulaanbaatar, Cairo, and Lagos are lagging behind



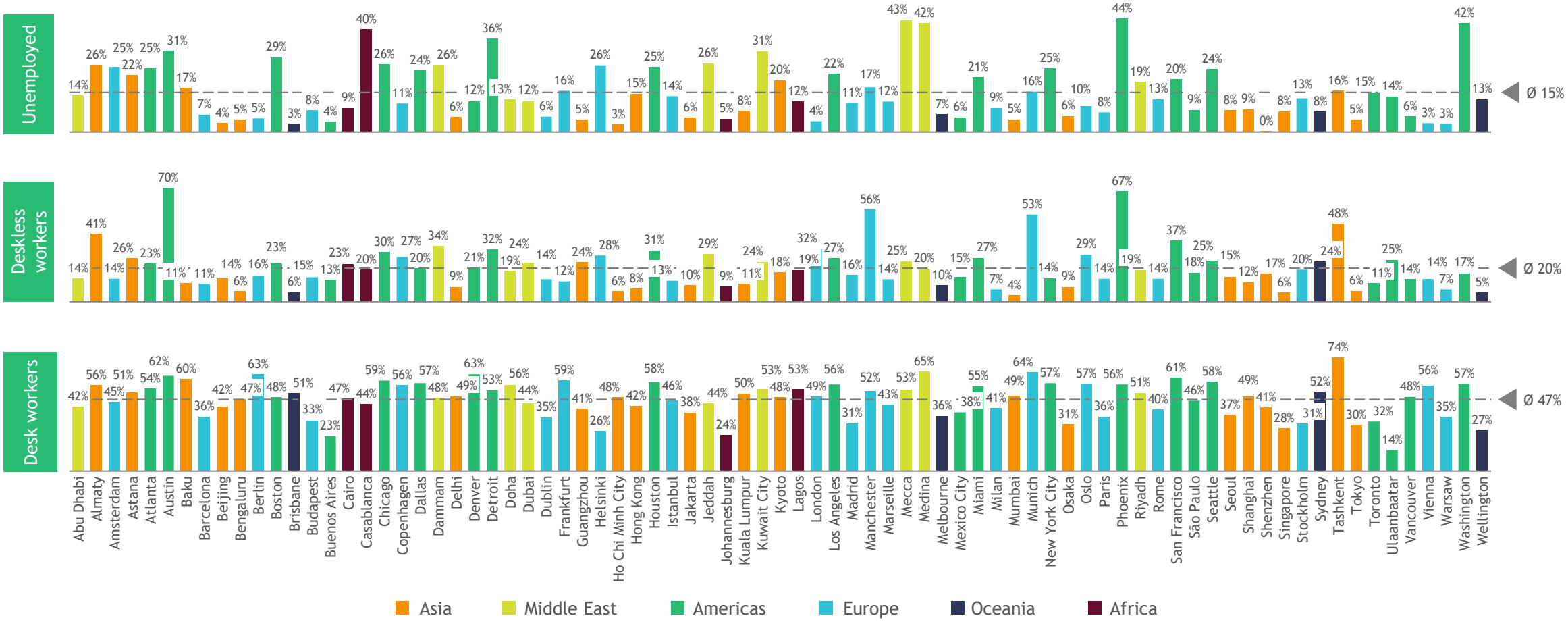
Theme 11

# Downtowns

Downtowns are strained since the pandemic because of remote and hybrid working, with lower footfall and retail spending

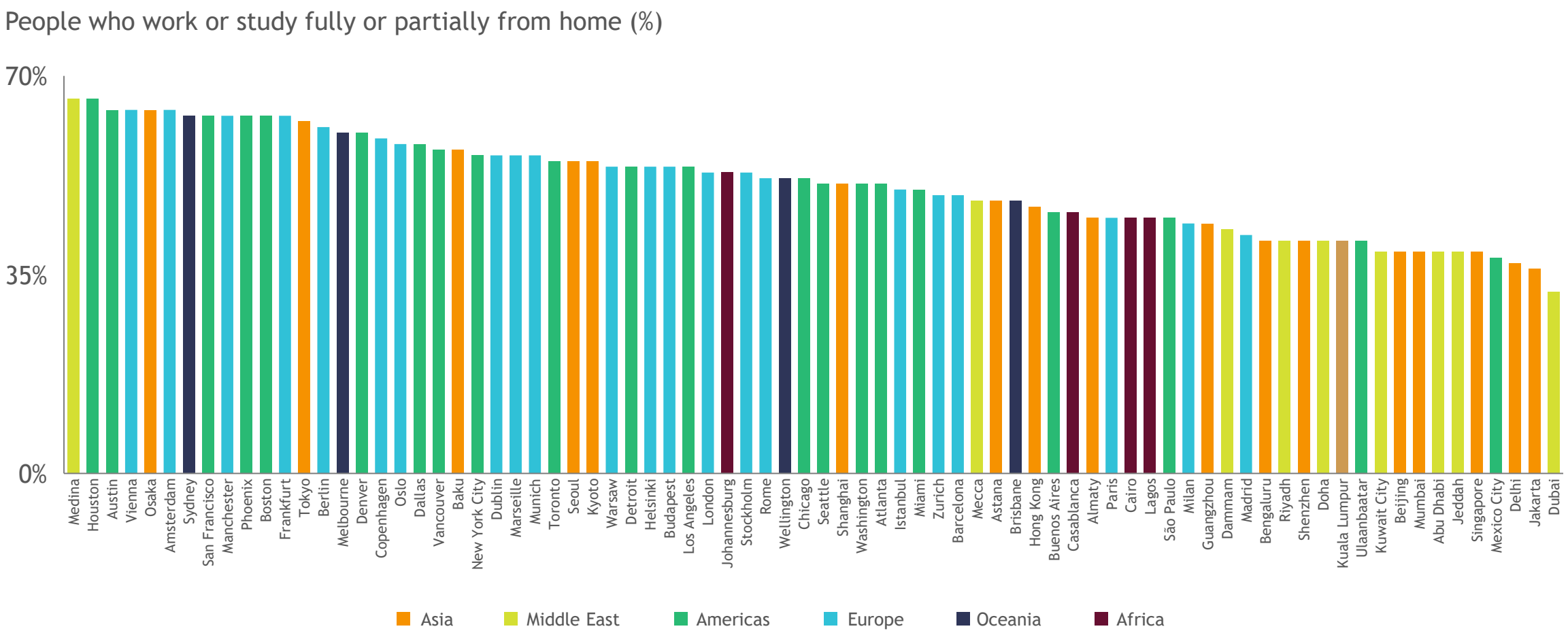
# Desk workers drive downtown vitality and economic activity, visiting leisure spots more often (47%) than deskless workers (20%) or the unemployed (15%)

## Respondents visiting leisure locations at least a few times per weak by employment category (%)



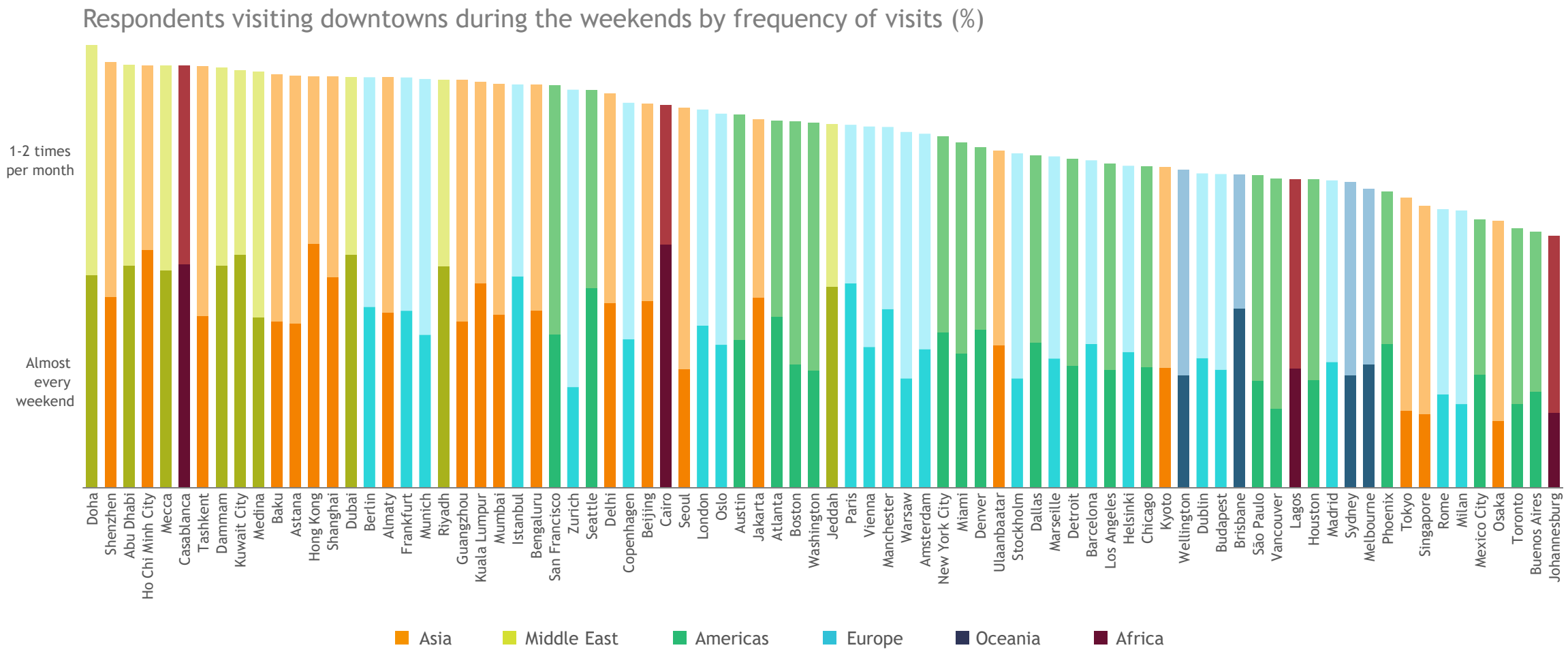

Note: Survey question, "How frequently do you visit the following social and leisure locations within your city: restaurants, markets, bars, entertainment?"
Sample: All respondents, n=300/city.

# Downtowns in Europe and North America continue to see a post-COVID outflow of office workers, with hybrid or home-based work exceeding 40% in major cities




Note: Survey question, “How often do you work/study in location outside of your home?” Sample: Employed respondents, entrepreneurs, and students, n=200-300/city.

# European and North American downtowns are also less frequented for weekend entertainment compared with those in the Middle East and Asia



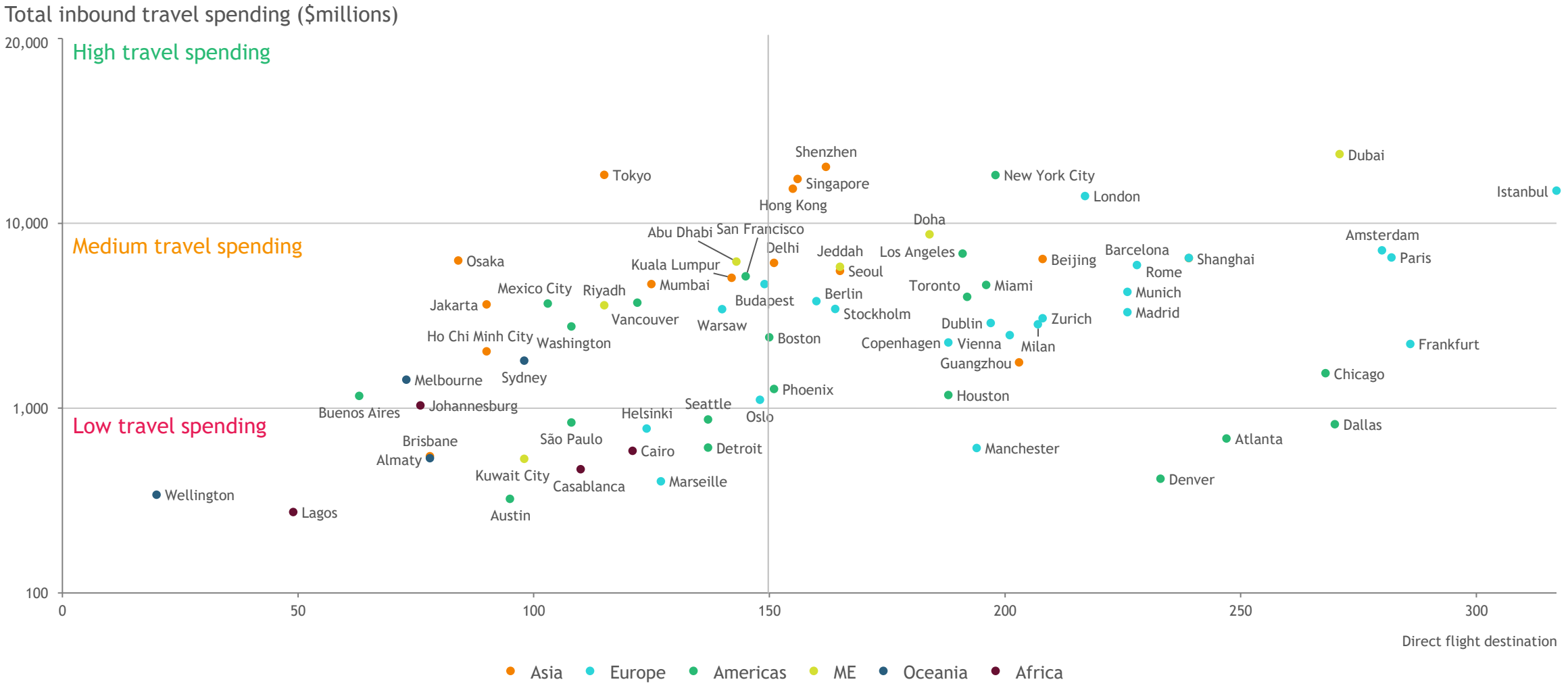

Note: Survey question, “How often do you visit a downtown/city center on weekends?” Sample: All respondents, n=300/city.

Theme 12

# Tourism and business leisure

Cities are becoming more popular destinations for tourists, with business travelers, for example, increasingly extending work trips for leisure, boosting footfall in well-connected cities

# Expansive flight connectivity amplifies a city's travel economy, with global hubs such as Dubai and Istanbul far outperforming peers

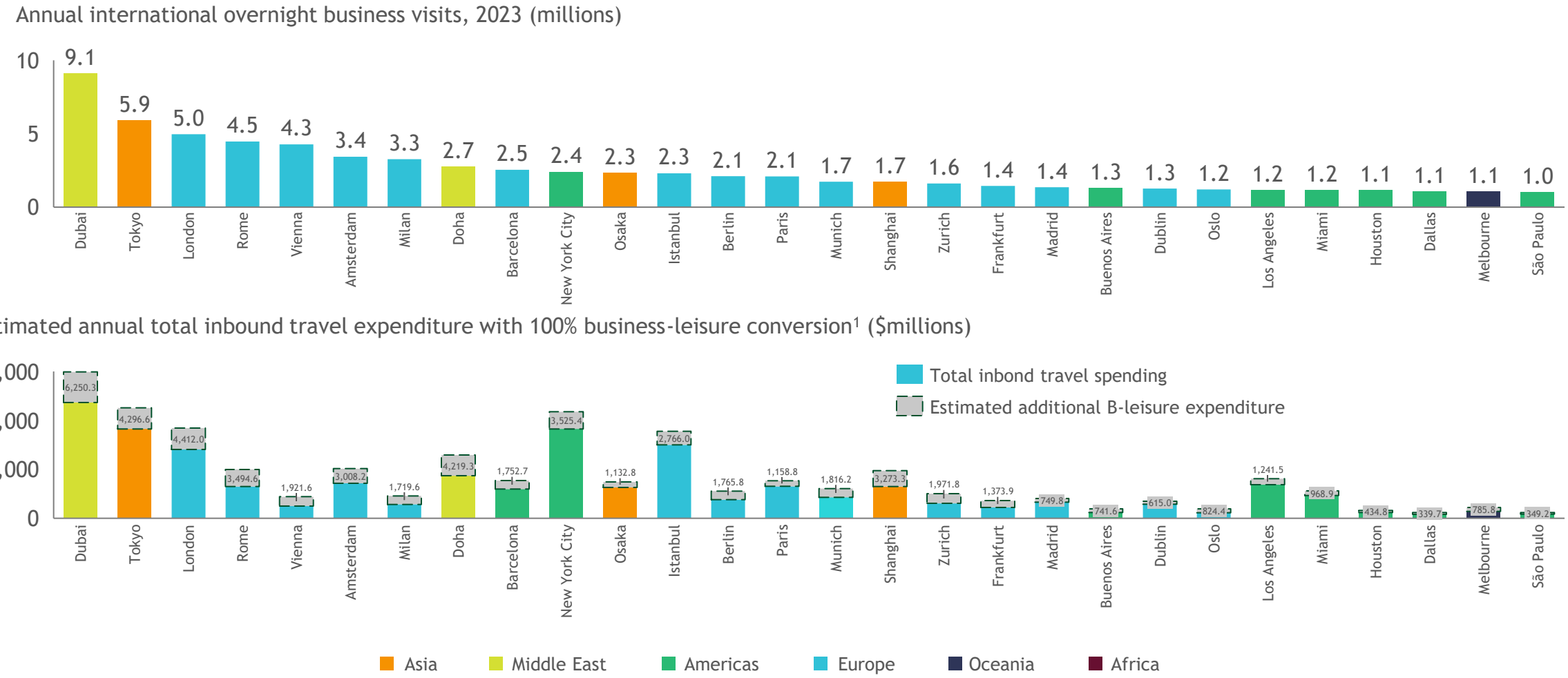


# BCG's recent report, *Traveler of the Future*,[1] provides insights on urban tourism

- **Cities are in the top share of travel,** with 15%-20% of all trips booked during the last 12 months (vs. nature at 12%-24%)
- A new trend important for cities emerges—**B-leisure tourism**—a combination of business and leisure; at least one combined trip taken by 35% of UK travelers, 85% of Chinese travelers, 87% of Saudi travelers
- This means that business travelers more and more combine business trips with leisure, **extending their business trips to experience the cities**
- This provides a great opportunity for cities to **expand their share of economy related to tourism**
- We have modeled the **conversion of business travelers into leisure visitors** for a sample of *Cities of Choice* participants

1. July 2025.

# Encouraging business travelers to extend their stay for leisure could unlock substantial additional inbound travel revenue




1. Estimated as average spending per leisure visit times the number of overnight business trips.
Source: Tourist Economy, BCG analysis.

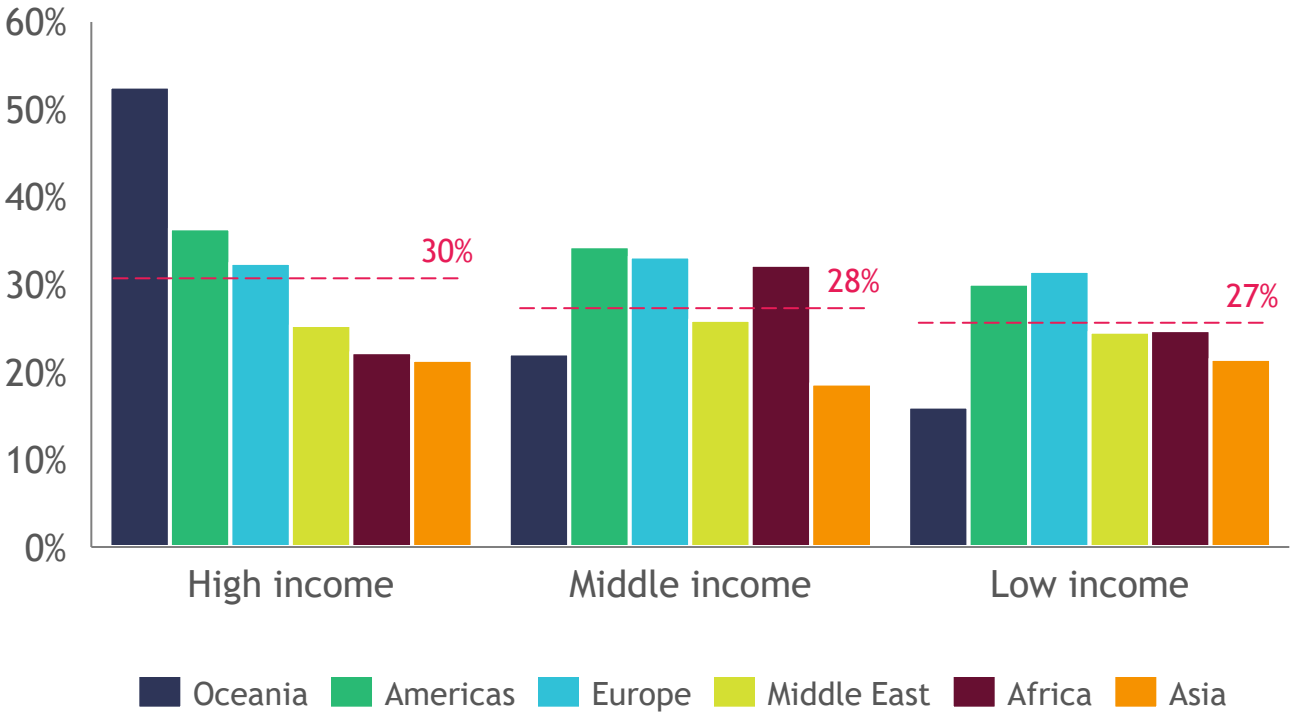
Theme 13

# Affluent executives

Affluent executives are semipermanently on the move for enhanced economic opportunity and livability

# The share of residents planning to move within two years is highest among high-income groups, indicating greater mobility intentions at higher income levels

Share of residents who plan to relocate within two years for different income levels[1]



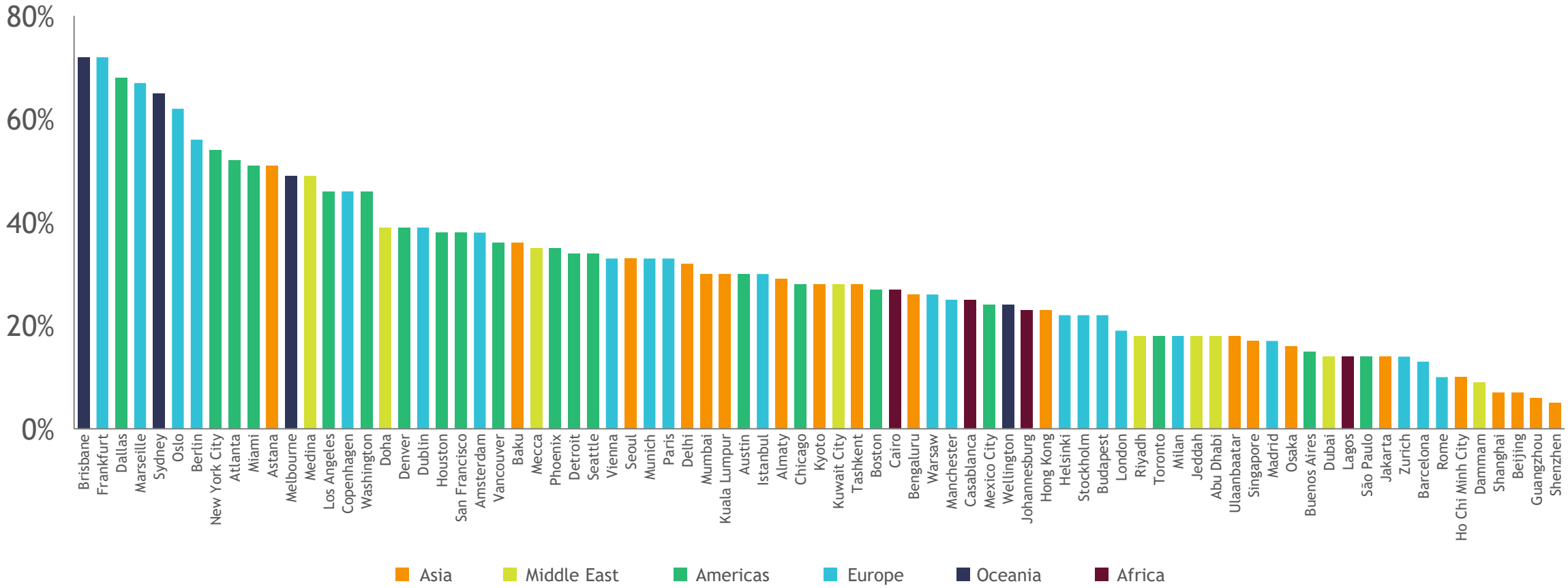

## Key observations

- Oceanian cities, led by Brisbane and Sydney, show the strongest relocation intent among high-income residents (over 50%), contrasted by the lowest intent among low-income groups
- Across Europe, Asia, and the Middle East, relocation intent remains relatively stable across income brackets, suggesting that income has limited influence on residents' decisions to move
- The Americas follow the global pattern, with relocation intent decreasing alongside income levels (from 36% to 34% and to 30%), reflecting a balanced but income-sensitive trend
- In Africa, middle- and low-income residents express slightly higher intent to relocate, pointing to aspirations for upward mobility and improved opportunities as key motivators

1. Income classification is based on the Cities of Choice Survey. Respondents are grouped into five income tiers relative to their city's average income: groups 4 and 5 represent high income, group 3 represents middle income, and groups 1 and 2 represent low income.

# Among high-income residents, cities such as Brisbane, Frankfurt, and Dallas show the strongest intent to relocate, while Chinese cities record the lowest

Share of high income population[1] that is planning to relocate within two years




1. Income classification is based on the Cities of Choice Survey. Respondents are grouped into five income tiers relative to their city's average income: groups 4 and 5 represent high income, group 3 represents middle income, and groups 1 and 2 represent low income.

Section 5

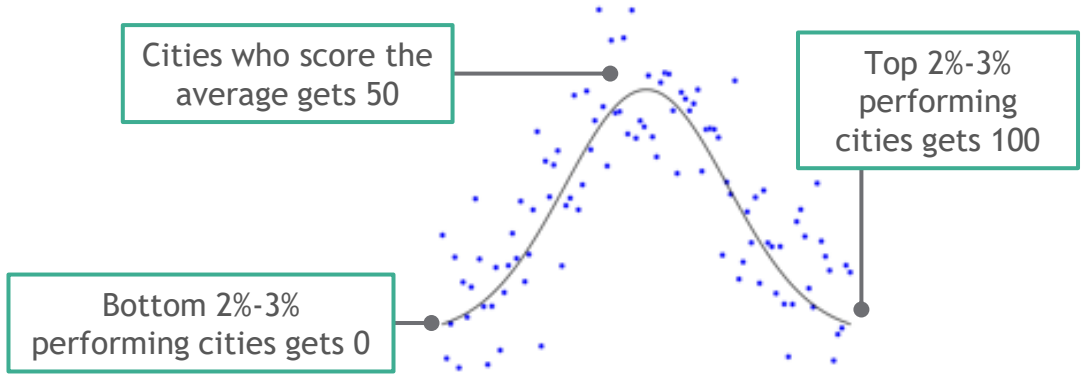
# Appendix: ranking methodology

# Weightings are defined individually for each of the 26 subdimensions for each city based on the residents' survey results

# Indicators are standardized and combined through weighted aggregation to produce the final index score

## Step 1: Normalize indicators and convert to score

- Each indicator is standardized across 80 cities and transformed onto a 0–100 scale
- The average city scores 50; top and bottom performers anchor the scale (100/0)




## Step 2: Weight and aggregate

- Indicators are combined into subdimensions using predefined weights
- Subdimensions are weighted to calculate the final index score
- Cities are clustered into five predefined groups and displayed as color-coded quintile rankings within each group

# *Cities of Choice 4.0* indicators (I/IV)

| Dimension | Subdimension | Indicator name |
|---|---|---|
| Economic opportunities | Opportunities for work, career, and income | The ratio of employed to residents of a working age, % |
| | | Unemployment rate, according to the ILO methodology, % |
| | | Presence of city infrastructure for remote work, score 0-2 |
| | | Internet Speed, mbps |
| | | Average yearly household income, price adjusted, USD per year |
| | | Food expenses as a share of total expenses, % |
| | | GDP PPP per employed, USD per year |
| | | Number of international business conferences hosted annually |
| | | Number of Fortune Global 500 company offices in the city |
| | | Survey[1] : Opportunities for professional self-realization, score |
| | | Survey: Availability of attractive employment opportunities, score |
| | | Survey: Share of respondents working from home at least 2 days/week, % |
| | Opportunities for business | Airport connectivity and passenger flow index |
| | | Total early-stage Entrepreneurial Activity Rate, % |
| | | Share of Service sector in the economy, % |
| | | Number of startups per 100,000 population |
| | | # of patents filed over last 3 years |
| | | VC investment in 2024, million USD |
| | | Vacancy rate of retail space, % |
| | | Survey: Perceived opportunities for starting a business, score |
| | | Economic land use score |
| | Equality of income | Gini coefficient |
| | Availability of personal loans | Average rate of retail loan, % |
| | | Survey: Accessibility of commercial loans, score |
| Livability | Cleanliness and hygiene | Number of public toilets available per 100,000 population |
| | | Share of houses equipped with water supply, % |
| | | Survey: Satisfaction with garbage collection and disposal services, score |
| | | Survey: Perceived cleanliness of streets and public spaces, score |
| | Comfortable climate | Extreme temperatures score (Celsius degrees exceeding limits of extreme temperature) |
| | | Average number of hours of sunshine per year |

| Dimension | Subdimension | Indicator name |
|---|---|---|
| Livability | Comfortable climate | Number of months with a comfortable daytime temperature |
| | | The average annual temperature difference, degree Celsius |
| | Consumption of goods and services | Square meters of retail space per 100,000 population |
| | | Number of points of sale per 100,000 population |
| | | Working hours of main shops, score |
| | | Number of local farmers' markets with the opportunity to buy fresh food, per 100,000 population |
| | | Penetration rate of non-cash payments, % |
| | | Share of the population using Internet sales channels, % |
| | | The presence and variety of the most well-known luxury goods shops, score |
| | | Non-Food Price Index |
| | | Survey: Availability of grocery stores within walking distance, score |
| | | Survey: Frequency of using food delivery apps or websites, score |
| | Ecology | Share of solid household waste that is recycled or recovered |
| | | Air quality: PM2.5 content |
| | | Air quality: PM10 content |
| | | Air quality: NO2 content |
| | | Air quality: O3 content |
| | | Commitment of city to sustainability actions |
| | Education and development | Share of children aged 4 attending kindergartens, % |
| | | Literacy rate among residents over the age of 15, % |
| | | Number of students per teacher |
| | | PIRLS test results |
| | | PISA test results |
| | | International Olympiad results across 8 disciplines |
| | | Share of population aged 5-18 that attends public school, % |
| | | Share of population with tertiary education, % |
| | | Number of universities in top 200 of international rankings |
| | | Survey: Accessibility and affordability of pre-school education, score |
| | | Survey: Children's participation in sports activities, score |
| | | Survey: Children's participation in after-school activities, score |

1. All survey questions, unless otherwise indicated, are measured on a 0–100 scale, with 0 denoting the lowest score and 100 the highest. All survey results have been normalized to this scale for comparability.

# *Cities of Choice 4.0* indicators (II/IV)

| Dimension | Subdimension | Indicator name |
|---|---|---|
| Livability | Entertainment and recreation | Number of cinemas per 100,000 population |
| | | Number restaurants per 100,000 population |
| | | Number of fitness centers and swimming pools per 100,000 population |
| | | Number of libraries per 100,000 population |
| | | Number of museums per 100,000 population |
| | | Number of theaters per 100,000 population |
| | | Number of world highest-grossing concert tours held in the city in 10 years |
| | | Number of Michelin-rated restaurants |
| | | The presence of significant events in popular sports (football, hockey, tennis, formula-1), units |
| | | Number of museums in the top 100 most visited art museums in the world according to The Art Newspaper |
| | | Number of exhibitions hosted by the city's museums ranked among the world's most visited art exhibitions by The Art Newspaper |
| | | Presence in the ranking of the best cities according to Time Out, 0-1 |
| | | Survey: Availability of leisure and entertainment opportunities, score |
| | | Survey: Frequency of using apps or websites to find cultural and entertainment activities, score |
| | | Survey: Population regularly engaged in sports, % |
| | Health care | Number of hospital beds per 100,000 population |
| | | Number of doctors per 100,000 population |
| | | Number of ambulances per 100,000 population |
| | | Life expectancy at birth, years |
| | | Average healthy life expectancy, years |
| | | Number of nurses per 100,000 population |
| | | Obesity rate, % |
| | | Availability of a unified appointment system for medical health (both private and public systems), score 0-2 |
| | | Survey: Perceived politeness and competence of medical personnel, score |
| | | Survey: Average waiting time for non-urgent medical appointments, days |
| | | Survey: Participation in healthy lifestyle programs during the past year, % |

| Dimension | Subdimension | Indicator name |
|---|---|---|
| Livability | Health care | Survey: Share of respondents who had a medical check-up in the past year, % |
| | | Survey: Frequency of using apps or websites for managing personal health, score |
| | Housing | Number of square meters of housing space per person, sq m |
| | | Presence of measures/government schemes supporting affordability of residential property, 0-2 (no program – city level program) |
| | | Number of hours that a person needs to work to purchase 1 m2 of housing |
| | | Average mortgage payment relative to average monthly household disposable income, % |
| | | Number of offerings of rental housing per city population |
| | | The average cost of renting a one-room apartment outside the city's downtown area in relation to the average monthly disposable income for a household, % |
| | | Extreme or insufficient population density for urban area, people/km2 |
| | | The share of the utility costs in the average monthly disposable household income, % |
| | | Level of domestic comfort (the share of housing equipped with washing and dishwasher machines and Internet access), % |
| | | Survey: Availability of suitable housing options, score |
| | | Survey: Frequency of using smart home apps or websites, score |
| | | Survey: Satisfaction with housing conditions, score |
| | | Survey: Frequency of using apps or websites for utility management, score |
| | | Survey: Satisfaction with quality of home utilities, score |
| | Mobility | Length of subway lines / urban area of the city, km |
| | | Number of passengers that use public transport per year per 1,000 urban city population |
| | | Share of population that has convenient access to public transport, % |
| | | Availability of dedicated lanes for Public transport, Yes/No |
| | | Presence of infrastructure for velo transport, ranking |
| | | Density of metro stations, #/km2 |
| | | Average time lost in traffic jams, hour / year |
| | | Avg length of the road network & driveways to the number of cars, km/100K cars |
| | | Number of taxis per 100,000 population |

# *Cities of Choice 4.0* indicators (III/IV)

| Dimension | Subdimension | Indicator name |
|---|---|---|
| Livability | Mobility | Availability of public transport in night hours, score |
| | | Cost of a monthly public transport ticket / monthly earnings, % |
| | | Number of deaths by road accidents per 100,000 population per year |
| | | Number of public transport modes under one fare system |
| | | Walkability score |
| | | Survey: Frequency of using smart parking apps or websites, score |
| | | Survey: Frequency of using apps or websites to reserve e-bikes/e-scooters, score |
| | | Survey: Average commuting time from home to work or school, minutes |
| | | Survey: Frequency of micromobility trips per person, score |
| | | Survey: Share of residents using bicycle/e-bike/scooter/skateboard for commuting from home to work/study, % |
| | | Survey: Share of residents using public transportation for commuting from home to work/study,% |
| | | Survey: Share of residents walking for commuting from home to work/study,% |
| | Public spaces | Share of the city's area allocated for green spaces, % |
| | | Share of population living within convenient walking distance to open public space, % |
| | | Number of children's playgrounds per 100,000 population |
| | | Survey: Availability of senior friendly infrastructure, score |
| | | Survey: Average weekly time spent outdoors, hours |
| | | Survey: Sidewalks are in good condition, convenient, not slippery or snowy, score |
| | Resilience to emergency situations | Number of intensive care beds per 100,000 population |
| | | Resilience strategy (incl. sustainability, to extreme natural disasters, terrorism/war) in place, score |
| | | Number of emergency service personnel per 100,000 population |
| | | Stability of the city's economic system in the event of economic instability, coefficient |
| | | Level of development for the insurance system: ratio of gross written premium to GDP |
| | | Availability of free city-level psychological support services, 0 -1 |

| Dimension | Subdimension | Indicator name |
|---|---|---|
| Livability | Resilience to emergency situations | Level of exposure to natural disasters and estimated potential impact of natural disasters, score |
| | | Mortality rate from infectious diseases, % |
| | | Number of deaths from natural disasters in the last 10 years per 100,000 population |
| | | Number of victims of terrorist attacks in the last 10 years per 100,000 population |
| | | Number of deaths from terrorist attacks in the last 10 years per 100,000 population |
| Social capital | Inclusivity and equality | Share of disabled people of working age who are employed,% |
| | | Inclusiveness Index |
| | | The share of public transport accessible to people with disabilities,% |
| | Identity with culture and history | The number of UNESCO cultural heritage sites, units |
| | | Number of nominations for prestigious international contemporary architecture awards over the past 10 years |
| | | The number of films from the IMDb list of top 250, which take place in the city |
| | | Survey: Pride in the city's history and culture, score |
| | Safety | Number of CCTV cameras within city area |
| | | Murders per year per 100,000 population |
| | | Street lighting, Watt/(cm2*steradian) |
| | | Survey: Awareness of incidents of physical assault, robbery, or harassment among acquaintances, score |
| | | Survey: Respondents sentiment of safety in the city, score |
| | | Survey: Residents concern about being physically attacked or robbed while in a public space, score |
| | | Survey: Residents concern about personal belongings being stolen, score |
| | Social connections | Helping a stranger, % |
| | | Share of people participating in donating money, % |
| | | Survey: Share of population considering oneself part of a certain community, % |
| | | Survey: Share of population that participated in local community activities at least once during the past year, % |
| | | Survey: Number of neighbors trusted to look after children |

# *Cities of Choice 4.0* indicators (IV/IV)

| Dimension | Subdimension | Indicator name |
|---|---|---|
| Social capital | Social connections | Survey: Number of neighbors personally known |
| | | Survey: Number of times of meet-ups with friends/colleagues outside of work per month |
| | | Survey: Level of trust in people within the city, score |
| | | Survey: Availability of longevity programs, score |
| | | Survey: Share of population feeling lonely the day before, % |
| Engagement with governments | Ability to influence events | Ability to vote for the city head, score |
| | | Ability to solve most popular problems using online tools, score |
| | | Availability of a special mobile app for citizens to influence the features of the city development, score |
| | | Survey: Perceived ability to influence things in the city, score |
| | Government services | E-Government Development Index (EGDI) |
| | | Survey: Easiness and effectiveness of obtaining public services, score |
| | Business environment | Number of coworkings per 100,000 population |
| | | Number of business incubators & accelerators per 100,000 population |
| | | Cost of business start-up procedures, % of GNI per capita |
| | | Time required to start a business, days |
| | | Survey: Availability of support for starting a business, score |
| | | Survey: Efficiency of the business startup process, score |
| | | Survey: Favorability of regulatory, tax, and law enforcement systems for business operations, score |
| Speed of change | Speed of change in economic opportunities | Real household income: average annual growth rate (2014 - 2024) |
| | | GINI coefficient: average annual growth rate (2014 - 2024) |
| | | Survey: Job opportunities & cost of living have improved over past five years, score |
| | | Survey: Financial situation has improved over the past three years, score |
| | | Average annual change in unemployment (2014-2024) |
| | Speed of change in engagement with governments | E-Government Development Index (EGDI): change in score over the last 10 years (2014 - 2024) |
| | | Survey: Government services have improved over the past five years, score |
| | | Survey: I trust the city authorities more today than I did three years ago, score |

| Dimension | Subdimension | Indicator name |
|---|---|---|
| Speed of change | Speed of change in livability | Average mortgage payment relative to average monthly household disposable income (2024 / 2014) |
| | | Average cost of renting an apartment versus the average monthly income: average annual growth rate (2014 - 2024) |
| | | Number square meters of living space per person: average annual growth rate (2014 - 2024) |
| | | Number of new subway stations built within the last 10 years (2014 - 2024) |
| | | Average life expectancy at birth: average growth rate (2014 - 2024) |
| | | Students' results in the PISA test: change over 10 years |
| | | Number of retail outlets per 100,000 population: average annual growth rate (2014 - 2024) |
| | | Air quality: PM2.5 content, average annual growth rate (2014 - 2024) |
| | | Survey: In general, over the past three years, the city has become better as a place to live, score |
| | Speed of change in social capital | Number of crimes per year per 100,000 population: average annual growth rate (2014 - 2024) |
| | | Number of murders per year per 100,000 population: average annual growth rate (2014 - 2024) |
| | | Helping a stranger: average annual growth rate (2014 - 2024) |
| | | Share of people participating in donating money: average annual growth rate (2014 - 2024) |
| | | Survey: Safety has improved over the past five years, score |
| | | Survey: Over the past three years, people in the city have become more open to communication and tolerant, score |

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