City Success:

What do the global indices tell us?

Executive Summary

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Executive Summary

Cities are the key building blocks of life in the 21st century; they are the junction boxes between the developed and developing world.

For the first time in human history, the majority of the world's population live in urban areas. By 2025, 75% of world population will live in cities and metropolitan areas. In other words, cities are fast becoming the fundamental form of human settlement. The cities of the 21st century are hubs of a new globalised society. They are the physical nodes of the global economy, the environment, information systems, infrastructure, and leisure and culture.

Therefore, the success of these 21st century cities is of vital importance not only to individual city residents, but to whole nations, continents, and indeed to global society at large. As the number of people living in cities increases, as more and more capital is invested in urban assets, and as nations become increasingly dependent upon cities for vital services and functions, the need for city success is increasing correspondingly.

But what is a successful city? Some broadly agreed indicators of medium term success are identifiable: connectivity and space to grow, quality of life and place (urban design), skills of the labour force, innovation and creativity, entrepreneurship, industrial structure, transparency of business environment, and city branding and identity. However, the problem is that whilst our systems of public information are relatively rich with *national* level information (supplied by the OECD, IMF, World Bank, UN, and the like), they tell us very little about which *cities* are succeeding or improving and how or why they are succeeding. Within a global urbanising world, information systems have been confined to capturing national data.

Due to this dearth of evidence, the science of city success is not yet properly formulated. What those interested in measuring city success *do* have at their disposal, however, is a growing collection of city indices, benchmarks, and other comparators, which may be of assistance.

A number of institutions, companies, and research bodies produce reports, benchmarks or indices of cities across the UK, Europe, and the rest of the world. These offer an insight into how various communities - business, political, cultural, and academic - view cities in a globalising world, and serve as invaluable sources to a range of organisations. The indices and benchmarks summarised in this report cover everything from cost of office space, to quality of life, to the number of car thefts per 1,000 people, to the depth and reach of 'city brands'. Environmental, social, and economic indicators are all given coverage across the various indices. Each by itself offers only a partial view of the city, dictated by the information that it details. In synthesis however, it is possible to get a more holistic picture of cities; this is the main value of the indices.

This review of world-wide indices of city perception and performance is undertaken with the intentions of

- Recognising the rapid growth of interest in city performance and the global indices that seek to illuminate it;
- Comparing the different approaches to benchmarking and indexing city performance;
- Providing an accessible digest of what the indices say overall;
- Promoting easy to use references to the data and indices;
- Identifying the ingredients of successful cities;
- Creating the platform for annual updates and thematic reviews; and
- Provoking debate and discussion.

The report covers both a review of some 30 major indices and describes other data backed processes that provide insights on city performance (see table 1). The report seeks to draw conclusions about city performance and success factors overall and to offer some views about which cities succeed and why. It also comments on perceptions of cities.

Of the indices reviewed, 23 cover the whole world (when viewed together), and several are continental indices. The 23 global indices are sub-divided into five clusters, or realms, which both group the indices together and distinguish them from the others. These five clusters are:

i. Global Economic Reach;
ii. Quality of Life;
iii. Image and Attractiveness;
iv. Investment and Fiscal Health; and
v. Knowledge Base.

For ease of reference each cluster is defined below and insights are offered on which cities lead within each cluster based on the rankings provided.

We also attempt to demonstrate what an overall index of indices would look like if it were produced as summation of all the indices, and this result too is presented below, although significant caveats exist as to why this approach is not methodologically sound - even if it does offer a simple aggregate.

Overall, this review of city indices helps to shed light on the growth of interest in how cities perform in the current global era which has had significant urbanisation and re-urbanisation effects. It starts to explain

- What is being measured about cities in the 21st century?
- Who is measuring city performance and why?
- How can the measurement of city performance emerge?

The indices covered in this report can be broadly broken down into those produced by the following types of organisations:

i. **International bodies** (United Nations Human Settlement Programme: UN Habitat; OECD; EU Urban Audit produced under the auspices of the European Commission by 27 National Statistical Offices working under Eurostat co-ordination)
ii. **Agencies with a sole focus on research**
    a. Private, for-profit agencies and consultancies such as BAK Basel Economics, Robert Huggins Associates, Anholt GMI, and Standard & Poor's;
    b. Think tanks such as the Institute of Public Policy Research;

Table 1 The Indices

		Ranked 1st	Ranked 2nd	Ranked 3rd	Ranked 4th	Ranked 5th
Global Economic Reach	GaWC: Roster of World Cities (1999)	London (first tier alpha)	Paris (first tier alpha)	New York (first tier alpha)	Tokyo (first tier alpha)	N/A
	MasterCard 'Worldwide Centres of Commerce Index' (2008)	London	New York	Tokyo	Singapore	Chicago
	PWC UK Economic Outlook (March 2007) 'Urban Agglomeration GDP Rankings for 2005'	Tokyo	New York	Los Angeles	Chicago	Paris
	PWC UK Economic Outlook (March 2007) 'Urban Agglomeration GDP Rankings for 2020'	Tokyo	New York	Los Angeles	London	Chicago
	Hunmin (2006): 'How Worldly Are World Cities?'	London	New York	Paris	Los Angeles	Amsterdam
	GaWC Assessment of Centrality (1997 data)	London	Frankfurt	Paris	New York	Amsterdam
	GaWC Airline Hubs Report (2007)	Atlanta	Chicago	Frankfurt	Dallas	London
Quality of Life	*Economist* Intelligence Unit 'Liveability Ranking' (2007)	Vancouver	Melbourne	Vienna	Perth	Toronto
	Monocle 'Global Quality of Life Survey' (2008)	Copenhagen	Munich	Tokyo	Zurich	Helsinki
	Mercer 'Quality of Living Survey' (2008)	Zurich	Vienna	Geneva	Vancouver	Auckland
	The Climate Group: ''Low Carbon: Leader Cities ' (2005)	Seattle	Copenhagen	Barcelona	San Francisco	Paris
Image and Attractiveness	Anholt GMI City Brands Index (2006)	Sydney	London	Paris	Rome	New York
	Economist Intelligence Unit 'Worldwide Business Trip Index' (2006)	Vancouver	Calgary	Toronto	Adelaide	Honolulu
	Deloitte 'HotelBenchmark™ Global Ranking Index' (2007)	Venice	Paris	Moscow	London	Dubai
	International Congress and Convention Association Rankings (2007)	Vienna	Berlin	Singapore	Paris	Barcelona
Investment and Fiscal	ULI PWC *'Emerging Trends In Real Estate © Europe 2008'* (Investment Prospects)	Moscow	Istanbul	Hamburg	Munich	Paris
	ULI PWC *'Emerging Trends in Real Estate ©: Asia Pacific 2008'* (Investment Prospects)	Shanghai	Singapore	Tokyo	Osaka	Hong Kong
	ULI PWC *'Emerging Trends in Real Estate © 2008'* (Investment Prospects)	Seattle	New York (overall)	Washington, D.C. (overall)	San Jose	Los Angeles (overall)
	Cushman & Wakefield: 'Main Streets across the World' (2007)	New York	Hong Kong	Paris	London	Tokyo
	Standard & Poor's: World's Top 10 Economic Centres' (2006)	Paris	Greater London Authority	Los Angeles	Madrid	Toronto
Knowledge Base	Robert Huggins Associates: *'World Knowledge Competitiveness Index'* (2008)	San Jose (US)	Boston	Hartford (US)	Stanford	San Francisco
	Shanghai Jiao Tong University: *'Academic Ranking of World Universities'* (2008)	Harvard University	Stanford University	University of California - Berkeley	Cambridge University	Massachusetts Institute of Technology (Boston)

Figure 1: Global Economic Reach

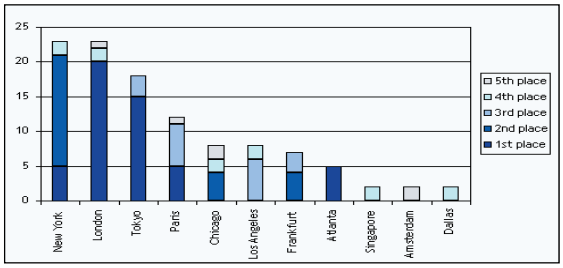


Figure 2: Quality of Life

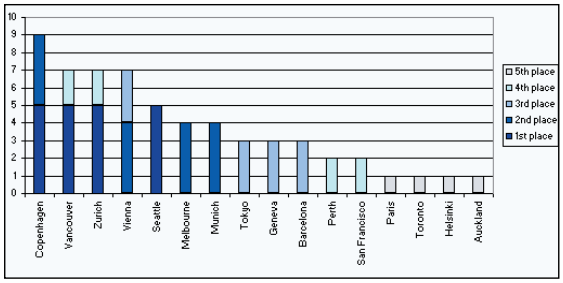


Figure 3: Image and Attractiveness

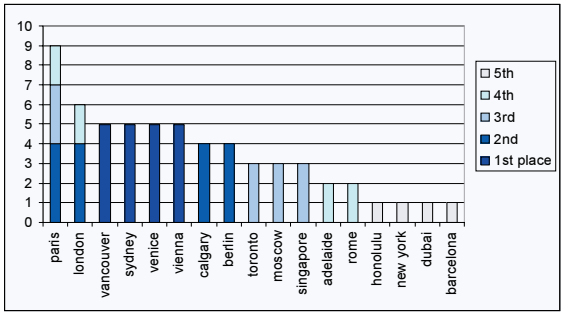


Figure 4: Investment and Fiscal

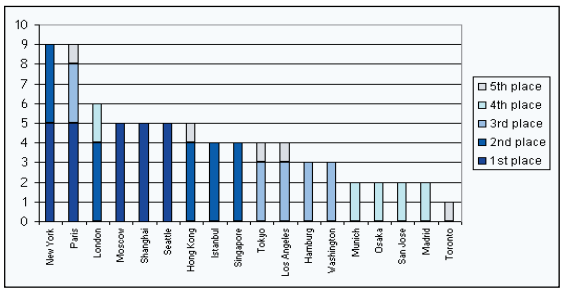
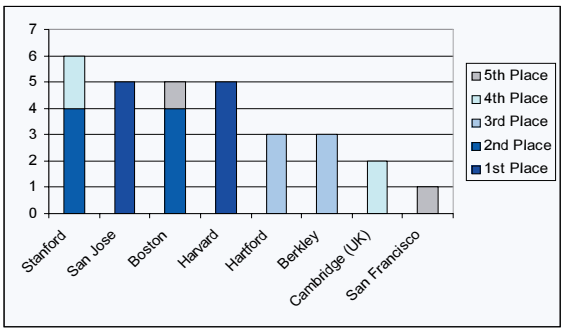


Figure 5: Knowledge Base



c. Non-profit research and education organisations such as the ULI, the Work Foundation, the Climate Group, and the Brookings Institution;
d. Collaborative efforts such as the Boho Britain Index produced by Demos (an independent think tank), BURA (the British Urban Regeneration Association - a leading independent organisation in the field of regeneration) and RICS (Royal Institute of Chartered Surveyors - a professional body addressing aspects of land, property, construction and the environment)

iii. **Private sector firms who conduct research as a secondary activity** (PricewaterhouseCoopers; Siemens; MasterCard; Mercer; Jones Lang LaSalle and Cushman & Wakefield)
iv. **Academic bodies and individual academics** (Globalisation and World Cities Network [GaWC]; Richard Florida; Paul Cheshire and Stefano Magrini and Shanghai Jiao Tong University [SJTU])

Global Economic Reach

The following seven indices are included in the Global Economic Reach cluster:

i. GaWC: Roster of World Cities (1999);
ii. MasterCard 'Worldwide Centres of Commerce Index' (2008);
iii. PWC UK Economic Outlook (March 2007) 'Urban Agglomeration GDP Rankings for 2005';
iv. PWC UK Economic Outlook (March 2007) 'Urban Agglomeration GDP Rankings for 2020';
v. Hunmin (2006) 'How worldly are world cities?'
vi. GaWC Assessment of Centrality (1997 data)
vii. GaWC Airline Hubs Report (2007)

The data used are from different years and are not highly comparable. A simple scoring is used so that the top five cities in each index are given a score of 5 – 1 for being placed first to fifth respectively and the totals are offered (figure 1). Each of London, Paris, New York, and Tokyo is classified as achieving 1st place on the GaWC World City Status index due to their identical score. The cluster is dominated by the 'established world cities' of New York, London, Tokyo, and Paris.

Quality of Life

The following four indices are reviewed in this cluster:

i. Economist Intelligence Unit (EIU): 'Liveability Ranking' (2007);
ii. Monocle 'Quality of Life Survey' (2008);
iii. Mercer 'Quality of Living Survey' (2008); and
iv. The Climate Group 'Low Carbon: Leader Cities' (2005).

In this cluster the Scandinavian, Swiss, Canadian, and Antipodean cities all do well (see figure 2). These cities offer the best liveability and environmental quality.

Image and Attractiveness

The following four indices are used in this cluster:

i. Anholt GMI: City Brands Index (2006);
ii. EIU 'Business Trip Index' (2006);
iii. Deloitte 'HotelBenchmark™ Global Ranking Index' (2007); and
iv. International Congress and Convention Association Rankings (2007)

Again, a simple weighting has been used to compare the cities on the indices with scores of 5 to 1 being given to cities placed first to fifth on each ranking. This methodology produces a comparative assessment where Paris comes first, followed by Vancouver, Vienna, Sydney, and Venice, which each were ranked first on a single index (see figure 3).

Investment and Fiscal

This cluster includes the following indices:

i. ULI PWC ' *'Emerging Trends In Real Estate Europe 2008'* (Investment Prospects)
ii. ULI PWC *'Emerging Trends in Real Estate Asia Pacific 2008'* (Investment Prospects)
iii. ULI PWC *'Emerging Trends in Real Estate 2008'* (Investment Prospects)
iv. Cushman & Wakefield 'Main Streets across the World' (2007)
v. Standard & Poor's 'World's Top 10 Economic Centers' (2006)

The world cities are again to the fore but the clustered ranking allows fast emerging cities such as Moscow, Shanghai, and Istanbul to appear alongside their more established partners. The ULI PWC reports show current and future trends effectively, as well as established positions, and this provides insights on the cities that are growing and developing rapidly.

Knowledge Base

This cluster includes two indices:

i. Robert Huggins Associates 'World Knowledge Competitiveness Index' (2008)
ii. Shanghai Jiao Tong University, 'Academic Ranking of World Universities' (2008)

These two indices measure quite different units: one is for universities and the other for city and metropolitan districts, but they measure things that are closely related. The 'Shanghai Index' is often used as a proxy for knowledge economy in cities, but it in fact measures research output from universities based in cities and does not really offer a meaningful city index as such. We have not used it therefore to calculate our aggregated city positioning.

Overview

It is clear from the summary in Table 1 that the same cities consistently appear in the top echelons of the rankings overall. London, New York, Paris, and Tokyo - consistent with their high ranking by the GaWC as top tier alpha world cities - are generally amongst the top cities across the breadth of rankings. These cities appear to be the truly world leading cities. Of course no city, even a world-leading city, is completely without challenges, and an examination of the range of benchmarks reveal that for cities such as London and New York, the greatest challenges are those relating to quality of life. These world-leading cities are amongst the most expensive in the world in which to live, yet do not offer a top standard quality of life. Indeed they fail to feature amongst the top cities of the EIU's liveability ranking or Mercer's Quality of Life ranking.

Within these 'clusters' of categories, other cities emerge as world leaders. For example, when assessed on economic performance, Frankfurt and Chicago join the world leaders. Central European, Antipodean, and Canadian cities are the world leaders on social and environmental measures, entirely displacing the traditional alpha cities. Equally, the world's leading academic cities are wholly niche performers - cities such as Boston, Cambridge (UK), and San Jose do not feature at all on other global indices but are represented strongly when examined for their knowledge base and strength in higher education. Furthermore, the academic rankings show an overwhelming predominance of North American cities - only 11 of the top 50 cities in the SJTU Ranking 2008 are located outside of the Continent.

In the branding categories, the geographic pattern of global leaders is more diverse, and is not necessarily correlated to economic strength. Indeed, some cities, such as Geneva, perform well on the branding indices because of their strength in quality–of-life areas. However, the cities with the strongest brands - notable examples being Sydney, Paris, and Barcelona - are seeing their economic performance improve, perhaps because they are realising that they can use their strong city brand to attract tourists, business, conferences, and investment. It is no coincidence that those cities placed highly in the branding rankings are also towards the top of the conference-host rankings, for example Paris, Barcelona, and Berlin. Businesses desire a presence in the most prestigious cities - and it is these cities which have the strongest brands.

In terms of future growth and investment, the ULI PWC Emerging Trends reports show that the picture is a multi-layered one. Perhaps the most dynamic returns are possible in emerging economy cities, such as Moscow, Istanbul, and Shanghai. However, the reports also show that investment in these cities is high risk - they do not have the stability of those cities that have long reigned at the top of the rankings, such as Paris, New York, and Tokyo.

Geographically, it is the North American and European cities which perform best across the range of benchmarks (although this outcome may reflect the interests and resources of those compiling the indices). Tokyo, Hong Kong, and the Australian cities are beginning to edge into some of the top spots - the first two on economic indicators and the latter on quality of life measures - but South and Central American cities and their African counterparts are notable by their almost complete absence from the top, and even middle, levels of the benchmarks.

Is an index of indices possible?

For a very wide range of reasons, compiling an 'index of indices' to produce an accurate ranking of the world's cities is difficult. Making simplistic comparisons between complex data sets arguably hides more than it reveals. This exercise raises several problems:

- Data from different indices covers different scales (for example regions; cities; universities).
- Data are from different time periods (for example, connectivity data (1997) and MasterCard data (2008)).
- Assigning 5 points for first place, 4 points for second place and so forth does not give any indication of the real differences between city scores on the indices themselves.

Table 2: Overall Scores: what 'An Index of Indices' might look like.

City	Score	Rank
London	35	=1
New York	33	2
Paris	31	3
Tokyo	25	4
Los Angeles	12	=5
Vancouver	12	=5
Vienna	12	=5
Seattle	11	8
Copenhagen	9	=9
Singapore	9	=9
Chicago	8	11
Frankfurt	7	=12
San Jose	7	=12
Zurich	7	14
Munich	6	15
Moscow	5	=16
Hong Kong	5	=16
Atlanta	5	=16
San Francisco	5	=16
Shanghai	5	=16
Sydney	5	=16
Toronto	5	=16
Venice	5	=16
Barcelona	4	=24
Berlin	4	=24
Boston	4	=24
Calgary	4	=24
Istanbul	4	=24
Melbourne	4	=24
Rome	4	=24
Dubai	3	=31
Geneva	3	=31
Hamburg	3	=31
Washington, D.C.	3	=31
Adelaide	2	=35
Amsterdam	2	=35
Dallas	2	=35
Madrid	2	=35
Osaka	2	=35
Perth	2	=35
Auckland	1	=41
Doha	1	=41
Helsinki	1	=41
Honolulu	1	=41

- Not every city is included in every index - for instance the 'Low Carbon: Leader Cities' Report only examines 15 cities from around the world. Therefore a city not performing well on this index is not evidence of poor performance on a global scale. Rather, its very inclusion in the index may be indicative of its success.
- Assigning a score does not catch the dynamic movement of cities up and down the indices over time.
- The indices mix performance data and perception data.

A simple aggregation produces a table something like table 2, but its use should be to promote discussion of better means to measure comparative city performance, rather than as a ranking in itself.

Common Factors of City Success?

What is revealed by more than 30 indices, despite all the problems associated with data and lack of objectivity, is a tendency to identify some short to medium-term measures of city success. These might include:

i. Connectivity and accessibility;
ii. Industrial and economic structure;
iii. Quality of life, place, and amenity;
iv. Skills of the city's labour force;
v. Innovation and creativity;
vi. Business environment and entrepreneurship and the cost base of cities;
vii. Image and identity; and
viii. Leadership and implementation of strategy.

Why Did Certain Kinds of City Succeed in the 20th Century?

Everybody is subconsciously aware of which cities succeeded above and beyond all others in the 20th century: the capitals of finance, culture, and global society - London and New York, Paris, and Tokyo. Why they were so successful is less clear and, to a certain degree, highly place specific.

New York and London both grew by serving rapidly expanding markets. New York's rise in the 20th century can be in part observed as linking a rapidly growing USA to global markets, whilst London's growth in the 18th and 19th centuries owed much to its role as an imperial capital, and the market that this empire brought. In the later years of the 20th century both cities took decisive roles in serving a rapidly growing and integrating global economy, especially, though not solely, with advanced financial and business/professional services. The dominant roles of engagement with and in the global economy, the English language, Anglo-American legal systems and capital markets, the internet and electronic trading, appear to have favoured London and New York, as the two leading cities in the domestic systems from which they come.

The role of empire and leadership of their domestic systems also helps to explain the success of Paris and Tokyo. Culture played a particularly important role in Paris' ascendance: in the inter-war period the city was famed for its cultural and artistic communities and its nightlife. It became a gathering place of cultural figures from around the world, from Stravinsky to Picasso, Dali, and Hemmingway. On the other hand, finance and technology played important roles in Tokyo's success.

Interestingly, all four cities, and particularly London, Paris, and Tokyo, showed remarkable resilience to catastrophes that shook the world, and these cities in particular. The Second World War devastated cities throughout Europe and beyond, but London was particularly weakened by the impact of the Blitz, whilst Paris had to recover from Nazi occupation. Tokyo bounced back from two earthquakes that almost completely destroyed the metropolis. In short, to become world leading cities these cities showed unrivalled toughness, resilience, and flexibility.

Will Different Cities Succeed in 21st Century?

Many new factors must be considered when predicting which cities will lead the world by 2100. Extended globalisation, emerging markets, climate change, technology, terrorism, population growth, and science will all play a part. Clearly however, history also matters: and the global copper, oil and gold exchanges will not be easily wrestled from London and New York, and the Eiffel Tower is staying put.

Nevertheless, these factors are likely to become less important.

Prediction, of course, is an imprecise art: could anyone in 1900 have predicted that London and New York would reach 2000 in such a great position? Probably not, but nonetheless, the performance of global cities on the medium term indicators of city success outlined in the introduction of this report may help us to predict which cities will succeed in the 21st century. Moreover, success of cities over the longer term involves different factors. Success of a city over five or ten business cycles is very different from success over one leader's mandate.

From this longer term perspective other factors may be important:

i. Openness to international populations;
ii. Power (and adaptability) of the city's identity and brand;
iii. Location and access to growing markets;
iv. The city's role in fostering/brokering international trade;
v. Power and influence of language and regulatory/legal/financial systems of the city;
vi. Depth of artistic, architectural and cultural endowment;
vii. Success in adjusting to shocks, and luck/skill in being on the right side of conflicts;
viii. Investment in the city from all sources (including higher tiers of government);
ix. Sustainability in terms of climate and environmental sensitivity; and,
x. Sustained city leadership and investment advocacy.

Should City Leaders Use City Indices?

As the conclusions drawn above show, city indices are helpful sources of insight and useful in the round when indicating where city leadership should focus attention and develop strategy. Unfortunately, however, they do not offer ready solutions - these still have to be worked out by city leaders themselves. Indices and benchmarks can assist city leaders and their partners to understand better how the city needs to change but they will have the best impact when their use is guided by clear principles:

i. **Be clear about purpose and audience.** Unless the benchmark's purpose and target audience is understood, the data cannot be properly contextualised nor can suitable conclusions be drawn. In particular, if the index is produced by a private sector firm it is important to investigate why it was produced and whether it was produced with a set of potential clients in mind.

ii. **Know the difference between perception *and* performance.** Disparities can exist between the perception of a city's performance and its actual performance. This not only illustrates the impact of city marketing and the image of a city on individuals, but can also provide an inaccurate picture of a city unless the two are separated. Perception can be best analysed by individuals who live outside the city, whilst actual performance can be investigated by asking city residents and other stakeholders.

iii. **Basket of measures not one measure: evaluate input versus output measures.** It is important to consider what research and analysis was conducted to produce the final benchmark/index.

iv. **Reflect on costs and time scale. What is appropriate?** Benchmarks and indices can take considerable time and money both to produce and to purchase. The breadth and depth of data required must be considered and a cost-benefit analysis may be conducted.

v. **Undertake assessment at the right spatial scale (functionality) and at an efficient scale.** Global indices should not be used to look at micro-scale urban variables. Likewise, functional urban regions may not correspond with geo-political boundaries. It is necessary to consider at what scale the data is to be analysed at, and thus what geographical area should be covered by the index.

vi. **Eschew one-off exercises (review needs to be continuous).** Some benchmarks are produced quarterly, some annually and some are a one-off exercise. To maintain an up-to-date impression of the benchmarks, they must be constantly reviewed and once out of date, replaced with newer versions of the same, or similar, reports.

vii. **Link to review of strategy and investment.** Benchmarks can be used to investigate how a city is performing on its strategy and investment trajectories.

viii. **Interpretation and discussion of results.** The findings of benchmarks and indices should be interpreted and discussed with regard to wider contextual issues.

ix. **Stimulate and build strategic discussion.** Benchmarks and indices can be used as a basis from which to launch strategic discussion. They allow the winners and losers in the new global economy to be examined, and they provide insights for city leaders into how to emulate successes and avoid failures.

x. **Mix different data and insights.** Finally, the best view of a city is produced by investigating a range of benchmarks and indices, together with other academic and practitioner literature.

Urban Land Institute (ULI)

The mission of the Urban Land Institute (ULI) is to provide leadership in the responsible use of land and in creating thriving communities worldwide. ULI is a non-profit research and education organisation founded in the USA in 1936, dedicated to the best in land use policy and practice. It has over 40,000 members worldwide including more than 2,500 in Europe, representing the entire spectrum of land use and development disciplines in both the private and public sectors. The ULI is the leading multidisciplinary industry forum encouraging the exchange of ideas, information, and experience and a think tank where members grow through sharing, mentoring, and problem solving.

ULI is a non-partisan research and educational institute directed by its members and supported by dues. ULI neither lobbies nor acts as an advocate for any single profession or industry. The Institute operates on a $55 million budget with a global staff of 200 headquartered in Washington, D.C. At the heart of the ULI experience is an open exchange of ideas, networking opportunities, and the ability to work with leaders in the land use industry. The ULI Europe office was opened in 2004 in London and is committed to bringing timely and informative programmes to all segments of the property community in Europe.

- **Bring People Together**–ULI activities in Europe are diverse, frequent, and of high quality including conferences, invitation-only roundtable District Councils and research panels.
- **Provide Information**–ULI leadership in education and research examines key trends and issues and provides practical tools for industry professionals.
- **Share Best Practice**–ULI draws upon the knowledge and experience of its members to encourage and recognise excellence.

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In 1995, he was elected as a Harkness Fellow and spent 18 months in the North America as a guest of the US federal government assessing city and regional economic development in 12 North American metropolitan regions from a base as a fellow at Columbia University in New York City. As Chairman of the European Urban Development Forum from 1996 to 2000 he oversaw reviews of development and regeneration in 24 European cities or regions. In 2005 he reviewed urban regeneration in seven Asian world cities for the OECD. In 2004 he provided training to city and regional development leaders from nine Southern African cities. He has directed comparative studies and assessments of London and New York, British and Spanish cities, and British and Canadian cities. He is currently directing the Sustainable Urban Development Dialogue for UK and Chinese cities sponsored by the British and Chinese governments.

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