

HEALTH WEALTH CAREER

People First:

Driving growth in
emerging megacities



MAKE TOMORROW, TODAY





Contents

1

Executive Summary

Pages 4-7

2

About the Study

Pages 8-11

3

Six Key Findings

Pages 12-41

4

Four Imperatives

Pages 42-49

5

Methodology

Pages 50-55

6

Appendix

Pages 56-57

7

Contributors

Pages 58-59

8

About Mercer

Pages 60-61



01

Executive Summary

Around the world, there are extraordinary growth opportunities for cities, businesses and people. Between 2010 and 2025, nearly half (47%) of GDP growth will come from 443 growth economy cities that are on a trajectory to attract one billion new consumers.¹ Growth comes with growing pains related to how cities function, how businesses meet labor needs and how people decide whether a job move is right for them.

Emerging cities face the pressures of finding, developing and keeping highly skilled workers. This pressure is compounded by the fact that ambitious, mobile and driven workers represent a flight risk — always. Although economic opportunities make these cities appear attractive financially, economic growth and investment alone do not always result in a desirable quality of life. There is significant risk in making generalizations about people or thinking money is the only answer.

What will bring the most skilled workers to power these future cities and motivate them to stay? That is exactly what we set out to determine in the People First: Driving Growth in Emerging Megacities study. To better grasp the complexity of people's motivations, Mercer has undertaken one of the biggest studies of its kind in scope and scale: We surveyed 7,200 people across 15 cities in seven countries. Real people told us what truly matters to them about the cities in which they live and work, providing a fundamental understanding of why someone would want to move to a specific city or live there — and what employers need to do to compete for talent.

In the inaugural year of the study, People First: Driving Growth in Emerging Megacities examines four vital and interrelated sets of needs — Human, Health, Money and Work — ranking 20 decision-making factors by importance to understand what motivates people to move or stay in a city and how to tailor programs and solutions that meet those needs based on data, analytics and insights. Additionally, most compelling

among the findings, we conducted a segmentation analysis based on demographics, life stages, career progressions, predispositions to lifelong learning, aspirations and levels of financial security, resulting in five personas. Each persona's set of needs is unique and has different motivational drivers. Emerging from the analysis of the research and the segmentation study are 10 essential outcomes comprising six key findings and four imperatives, enabling cities, businesses and people to succeed in untold, new ways, given this unprecedented opportunity.

In summary:

- To attract and keep people demands creating an environment for them to thrive across multiple dimensions. Doing so requires putting people first and focusing on what matters most. Employers misunderstand what motivates people to move to a city and stay there — human and social factors are actually more important than money and work factors. Closing this gap necessitates understanding that each worker has a unique set of needs and, as such, employers must customize communications, compensation packages and programs accordingly. One size does not fit all — not for cities, not for businesses and definitely not for people.
- Cities are not performing well, creating tensions between what people value and a city's ability to deliver accordingly. We found a 30+ point gap between workers' quality of life expectations and how a city is meeting them. We have grouped the 15 cities into three categories based on these factors: Advanced, Progressing and Approaching. In the aggregate, these on-the-rise cities have the potential to leapfrog today's overpopulated or resource-constrained capitals and to learn from their mistakes. No single entity can solve systemic problems, making public-private partnerships crucial to address macro issues and gaps, such as in infrastructure, safety and housing, and to overcome challenges before they become exacerbated. Public-private partnerships are essential for cities, businesses and people to succeed.

1. McKinsey Global Institute.



- Employers and workers share the belief that jobs will change for the better in the next decade, as technology enables people to work smarter and make faster decisions. Although both groups agree that technology, automation and digitization will make work more efficient, unique human capabilities will propel these cities. Despite technological advances, employers must not lose sight of the value of the human qualities and skills as well as the training required.

Using robust data and insights, this study provides actionable strategies businesses can use to attract, develop and keep the best and the brightest workers. With it, multinationals, municipalities and local companies can ensure their cities will continue to thrive — powered by what gives any place heart, soul and drive: **people**.



David Anderson

President, International,
Mercer



Pearly Siffel

Strategy and Geographic
Expansion Leader,
International, Mercer

10 Essential Outcomes

Six Key Findings

What Matters Most

What Employers
Get Wrong

Unique Workers,
Unique Needs

Tensions: Worker
Expectations vs. City
Performance

Humanity, Technology and
Future of Work

Public-Private
Partnerships Essential to
Close Performance Gaps

Four Key Imperatives

Listen, Focus and
Put People First

Think Holistically and Customize
Meaningful Offerings

Prioritize Humans
(Not Robots) for a
Competitive Advantage

Forge Public-Private
Partnerships for
All to Succeed





02

About the Study

Urbanization is developing at such a rate that nearly half (47%) of GDP growth will come from 443 growth economy cities between 2010 and 2025, with a trajectory of reaching one billion new consumers.² Among these growing urban centers are cities that, between now and 2030, will significantly change the way people live and work.

Most city studies rely on secondary research or academic papers analyzing economic data and investments, infrastructure (housing, education, roads and railways), technological advancements and movement to smart cities. This study investigates the underexamined yet highly critical human and social reasons people move to, within or out of a city. It focuses on 20 factors across four pillars – Human, Health, Money and Work.



HUMAN

- Overall satisfaction with life
- Security, safety and lack of violence
- Proximity to family and friends
- Weather and city climate
- Culture, access to restaurants, theaters, music, social life



HEALTH

- Access to affordable healthcare
- Air and water quality/pollution
- Personal stress/anxiety levels
- Access to childcare and elderly care
- Access to parks, green spaces and water areas



MONEY

- Employer-supported life/medical/accident insurance
- Total income (pay and bonus)
- Affordable housing
- Economy (city or industry)
- Worker benefits (vacation/holiday, education, car, pension)



WORK

- Career and job opportunities
- Job satisfaction
- Education, training and skills development
- Transportation, traffic and mobility
- Proximity to airport

All respondents were asked to select and rank the top five factors based on how important they were in affecting the respondent's decision to stay in or leave a city. The percentages used for the importance rankings reflect the number of people who ranked those decision factors in their top three – first, second and third ranking order combined.

People First: Driving Growth in Emerging Megacities is one of the largest studies of its kind in size and scope:

- Responses from 7,200 workers and 577 employers; 99% of all respondents are nationals
- Analysis of both employer and worker views across 15 cities and against the four pillars
- Rankings of a city's performance versus its peers against the 20 factors from people's perspectives

In year one of this study, 15 current and future megacities across seven countries were selected based on the following criteria:

- Population of 3 million to 15 million
- Strong projected GDP and population growth for the next decade
- More than US \$4 billion of foreign direct investment annually

The current total combined population of the selected 15 cities is 114 million and is projected to grow 30% to 150 million by 2030 ³; this is equivalent to the size of Poland or that of Belgium, Denmark, Finland, and the Netherlands combined.

Participating Cities

Brazil: Belo Horizonte, Curitiba

China: Chengdu, Hangzhou, Nanjing, Qingdao

India: Ahmedabad, Chennai, Hyderabad, Kolkata

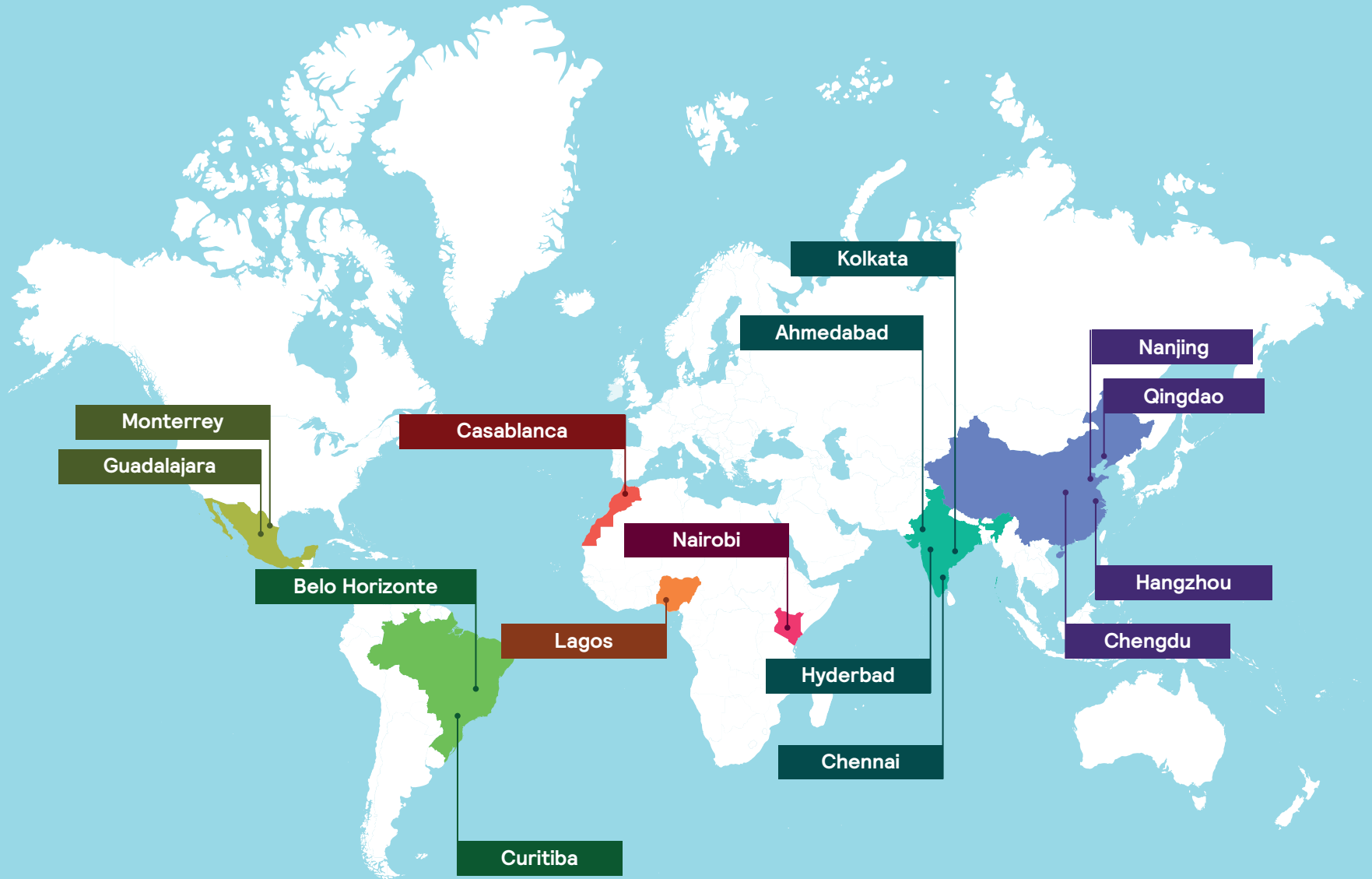
Kenya: Nairobi

Mexico: Guadalajara, Monterrey

Morocco: Casablanca

Nigeria: Lagos

3. United Nations. "World Urbanization Prospects 2018," available at <https://population.un.org/wup>.





03

Six Key Findings

To determine what motivates people to move to or stay in a city, Mercer's study, *People First: Driving Growth in Emerging Megacities*, found the answer varies based on both the question and the importance placed on each of the 20 interrelated Human, Health, Money and Work factors.

What emerged most of all is that for cities and businesses to attract workers with the talent and skills to do the work of the future, people's needs must be addressed more specifically, holistically and meaningfully.

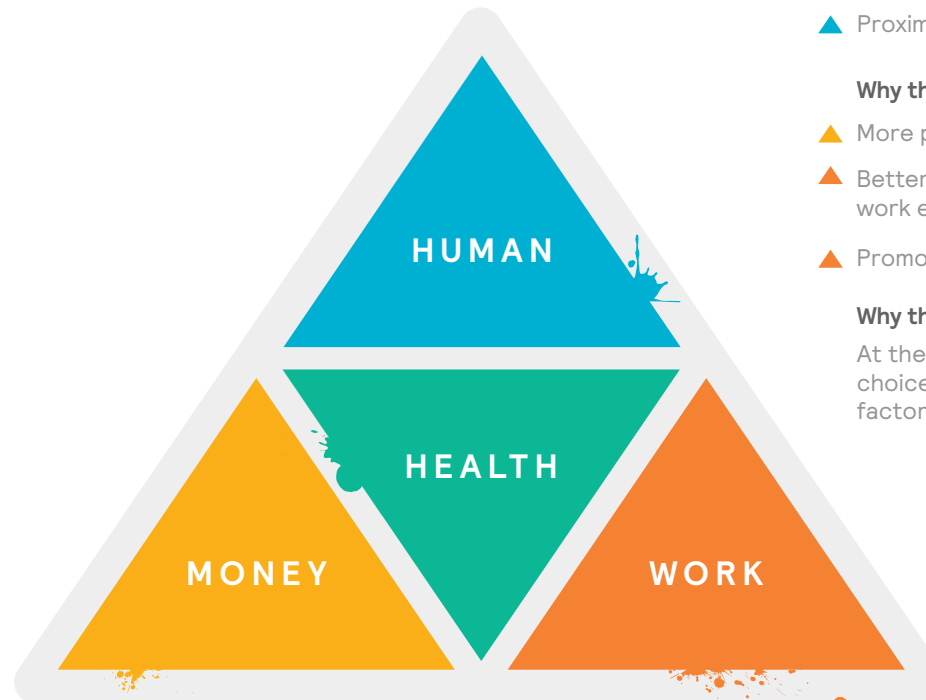
Key Finding #1: What Matters Most

So what do workers need and want? In short: It depends. Needs vary depending on the decision an individual is trying to make: Move to a new city? Change my employer? Change my neighborhood?

When determining "why this city?" in which to live and work, this study found that of the four sets of factors — Human, Health, Money and Work — human (and social) factors are the most important.

Once in a city, the question becomes "why this employer?" Why would you work for one employer versus another, or one industry versus another? The answer is primarily for greater wealth and career opportunities, with additional requirements based on an employee's unique set of needs.

Priorities shift once again when asking "why this neighborhood?" At the hyper-local level, workers care about proximity to supermarkets, banks, restaurants, public transportation, schools and healthcare — which are related to all four pillars.



Why this city?

- ▲ Overall satisfaction with life — 46%
- ▲ Security, safety and lack of violence — 37%
- ▲ Proximity to family and friends — 23%

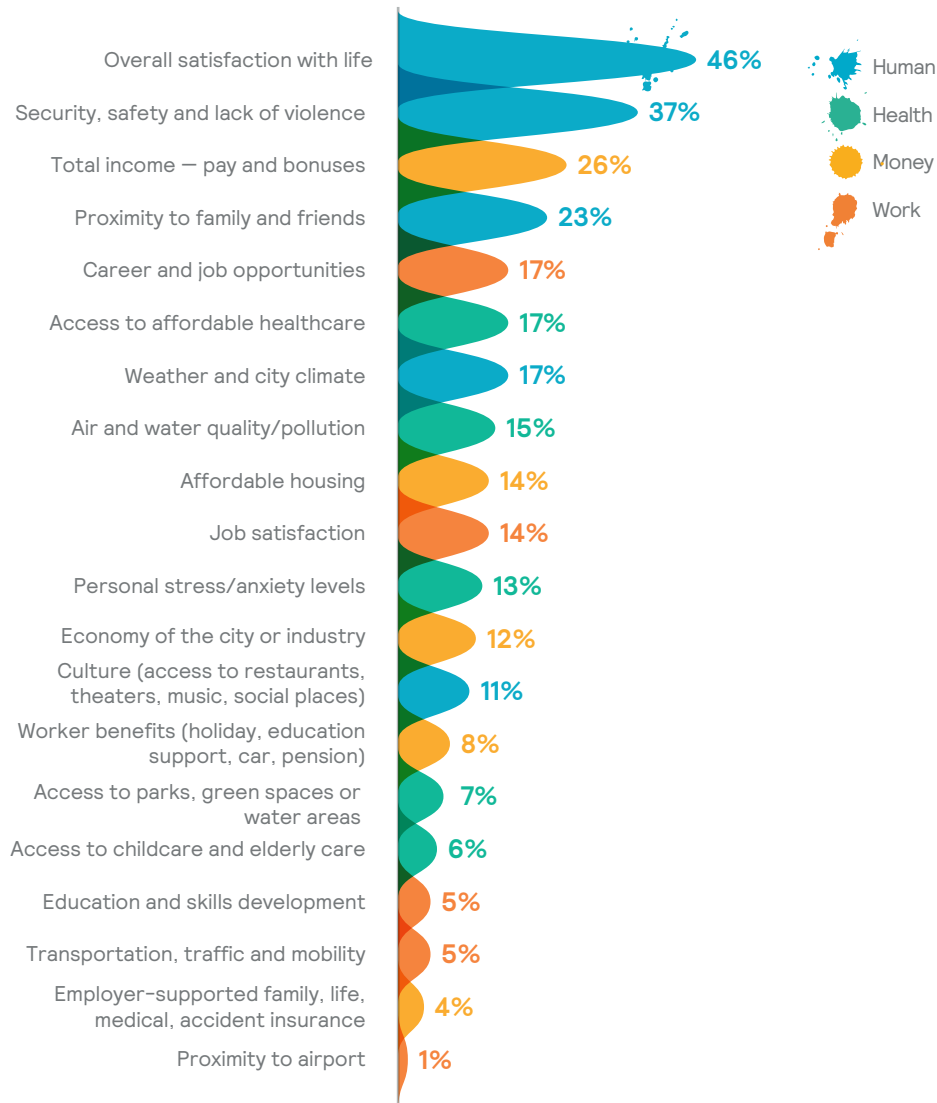
Why this employer?

- ▲ More pay to work elsewhere — 59%
- ▲ Better career opportunities to work elsewhere — 58%
- ▲ Promotion or advancement — 41%

Why this neighborhood?

At the hyper-local level, workers' choices are affected by proximity factors related to all four pillars

Factors Important to Workers Staying or Leaving a City



“Why this city?”

The number one answer is “I want a better life.” Overall satisfaction with life ranked most important for workers to stay in or leave a city.

Ranked second is safety and security. Is the city secure? Is it safe? Can I (and my family) be free from violence? Although essentially a negative factor, this is a primal human need and weighs heavily in considering a move to a new city.

In fourth place is proximity to family and friends. Do I have access to the people I like and love? The remaining two factors in the top five are total income and career/job opportunities – notably, though, money is a proxy for many things, including quality of life.

Significantly, for workers, three human factors rank in the top four. The top two

ranked factors – overall satisfaction with life and safety and security – are basic needs and are fundamentally important. Ranking outside the top five are factors that are, essentially, environmental and of varying importance depending on how well the key considerations are met. What is the climate like? How bad is the pollution? Can I afford the housing? Is my job satisfying?

Interestingly, at this point in the decision-making process, less importance is placed on education, skills development, insurance, and transportation or mobility, as these factors either are less controllable or have already been satisfied. For example, many of these workers are already graduates and, therefore, may not value additional education opportunities in comparison to other factors.

“Growing second-tier cities bring with them greater proximity to where people originally come from — so greater cultural proximity, less overwhelmed infrastructures and, potentially, significantly lower costs of living. A lot of workers don't even have the opportunity to live with their families in the same physical environment. They are disconnected, often between rural and urban, or different types of cities, and often separated by thousands of kilometers. So there must be a first big question about whether housing — local housing for workers — allows for families to be joined.”

Philipp Rode, Executive Director of LSE Cities and Associate Professorial Research Fellow, London School of Economics

“As far as local talent and white-collar educated workers go, [businesses] attract people en masse. Take Tianfu New Area in Chengdu as a great example. High-tech booms in the middle of nowhere. A city that 10 to 15 years ago was a backwater has managed to attract all this talent. They do put up job ads, and highly qualified applicants will apply, but usually these men and women want to work in Shanghai and Beijing. A lot of times they'll get these jobs, and the jobs will move them out. So it's more of a forced migration than actually attracting the employees.”

Wade Shepard, Author, *Ghost Cities of China*



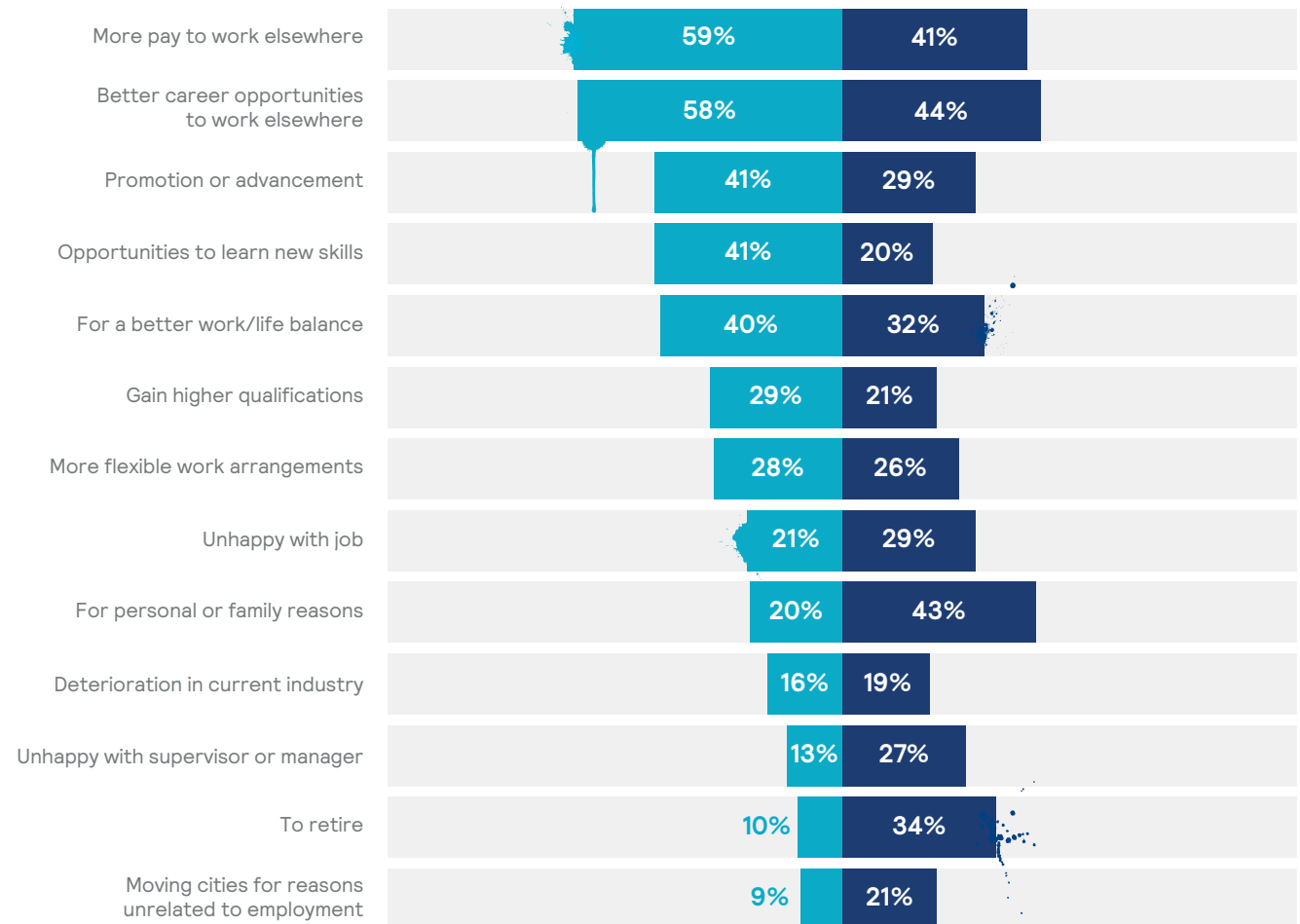
“Why this employer?”

When looking to make a professional move within a city, the top three motivational drivers are money, better career opportunities, and promotion or advancement. Rounding out the top five are opportunities to learn new skills and better work/life balance.

The key distinction at this stage is that only after people have made the big decision and already moved to a new city do money and job factors become more important. Top-tier factors influencing decisions in making the move now become second-tier factors once the city has been chosen and the move made. For example, dissatisfaction with one’s job, supervisor or industry downfall is less relevant when determining whether to move to a different city.

Drivers of Job Change Within a City

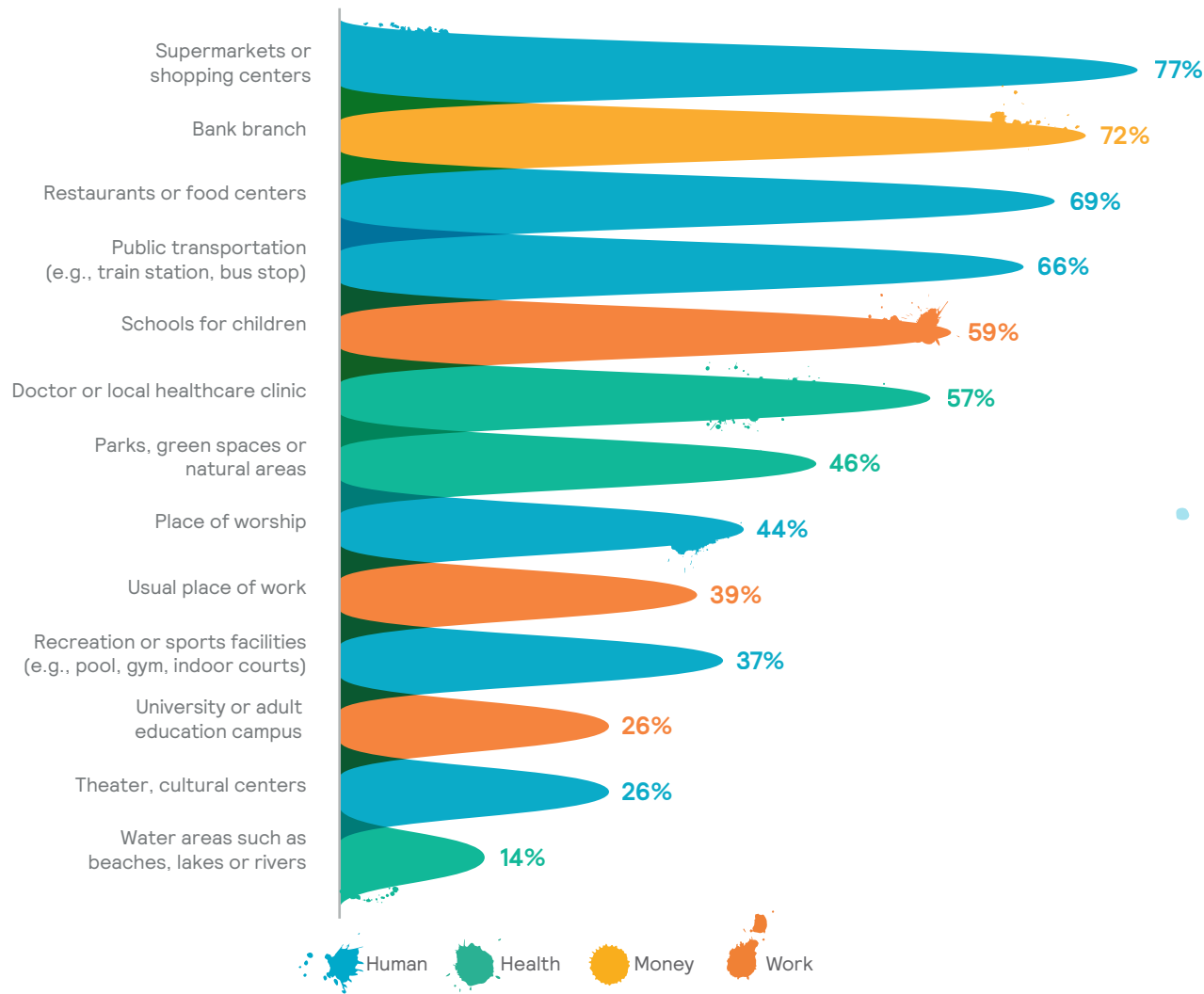
In your opinion, what are the most likely reasons that you might change your job in the next 1–5 years?



Employee  Employer 

Accessibility of Local Amenities to Where Workers Live and Work

How many of the following services or places can you access within 15–20 minutes of travel time from where you live? Please base this on the mode of transportation you normally use.



“Why this neighborhood?”

Although not primary factors when deciding to move to a city, good local options are important to the quality of life once relocated – and whether people stay.

At the hyper-local level, proximity-based and cultural factors matter more. The study found a correlation between overall satisfaction with life and access to daily life services or facilities that span all four factors (human, health, money and work). Specifically affecting workers’ choices about where to live within a city are proximity to supermarkets (1st), banks (2nd), restaurants and food centers (3rd), public transportation (4th) and schools (5th).

“At the hyper-local level, job location is less of a question than is proximity to services and friends, and all sorts of amenities that you rely upon. This gives a good indication of how the hyper-local may relate to the much broader question of quality of life. I would be surprised if there is not a strong correlation.”

Philipp Rode, Executive Director of LSE Cities and Associate Professorial Research Fellow, London School of Economics

Key Finding #2: What Employers Get Wrong

Employers believe workers prioritize money- and work-related factors when deciding whether to switch cities. They don't. Most important to workers are the human and social factors essential to quality of life: overall life satisfaction (1st), security and safety (2nd), and proximity to family and friends (4th). Although workers do rank total income as third, it is the only money factor in the top five.

Whereas workers place primary importance on overall life satisfaction, employers are overemphasizing the role of career opportunities and job satisfaction. People are willing to put job satisfaction lower on their criteria if they can satisfy the other needs.

Employers need to think beyond obtaining workers from those already living in their city. Even when trying to attract workers from other cities, businesses are focusing primarily — and almost exclusively — on the second-tier money- and job-related factors that are more important once in a city and looking for a new job — but not the major reasons someone would move to a city in the first place.

Most Important Factors to Workers Staying in or Leaving a City



WORKERS' RANKING

Workers rate
life satisfaction 2x more important
than employers realize



1. Life
satisfaction



2. Safety
and security



3. Pay and
bonuses



4. Family
and friends

EMPLOYERS' RANKING

Employers rate
career and job opportunities 2x more
important than workers think



1. Career and work
opportunities



2. Safety
and security



3. Work
satisfaction

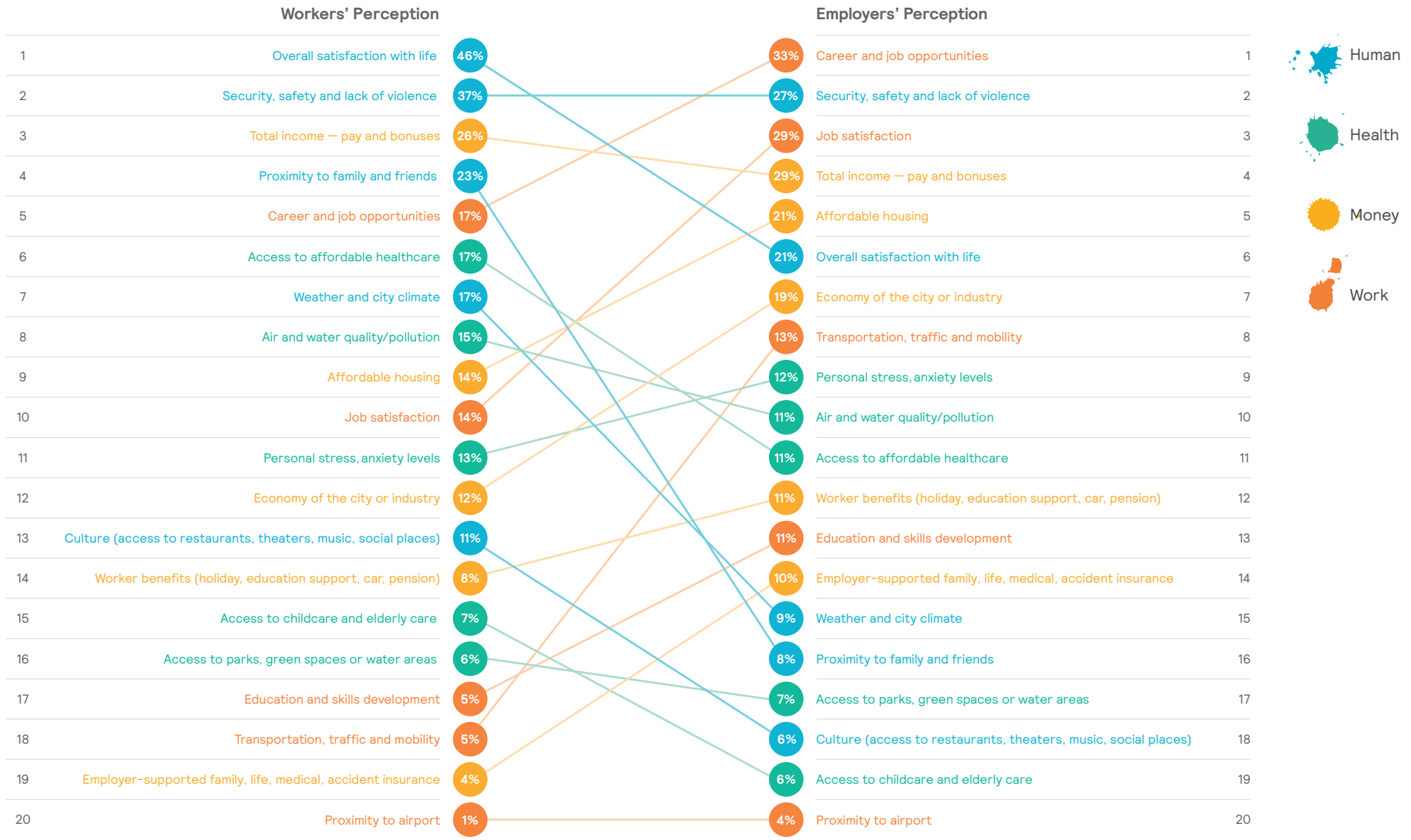


4. Pay and
bonuses

Most Important Factors in Terms of Moving to or Staying in a City

WORKERS: Please rank the top five factors in order of how important they are in your decision to either stay in or to leave in the next 1-5 years.

EMPLOYERS: Please rank the top five factors in order of how important you believe they are in your employees' decisions to either stay in or to leave in the next 1-5 years.



- Human
- Health
- Money
- Work

Key Finding #3: Unique Workers, Unique Needs

With greater understanding of people's particular needs, wants and motivations, as well as the advice they value, businesses can tailor offerings accordingly to attract and keep the best talent.

A significant distinguishing factor of the People First: Driving Growth in Emerging Megacities research is a segmentation study that looks beyond demographics to identify very distinct, statistically different personas across all 15 cities. The segments were clustered based on careers or jobs, income, levels of financial security, life stage, predisposition to lifelong learning, overall stress levels and satisfaction with life.

Each of the five segments or personas identified has discrete attitudinal characteristics and needs.



**CONFIDENT
ACHIEVERS**



**WHITE-COLLAR
PROFESSIONALS
AND GRADUATES**



**STRUGGLING
VOCATIONALS**



**BUSINESS OWNERS
AND SKILLED
TRADESPEOPLE**



**PROFESSIONAL
FAMILIES**

RESPONDENTS	26%	25%	13%	15%	21%
DESCRIPTION	<ul style="list-style-type: none"> Executives and senior professionals with high income and high life satisfaction Predominantly males, 25-44 years of age Typically married, own a home Travel time to work between 10 minutes and 1 hour 	<ul style="list-style-type: none"> Established professionals and fresh graduates, generally satisfied with their life in the city Predominantly females, 18-34 years of age Rent or live with family Travel time to work between 10 minutes and 1 hour 	<ul style="list-style-type: none"> Vocational workers typically in lower-income jobs with high stress and lower life satisfaction Predominantly females, often single, 18-44 years of age Financial insecurity Rent or live with family Travel time to work less than 1 hour 	<ul style="list-style-type: none"> Self-employed skilled tradespeople Predominantly males, mixed age group Low to middle income Rent or live with family Travel time to work less than 1 hour 	<ul style="list-style-type: none"> Senior professionals and mid-level managers Married, over 35 years of age Higher income, moderate life satisfaction, high stress Predominantly own home Travel time to work longer than 30 minutes

The Personas

Confident Achievers

Confident Achievers are executives, senior professionals, predominantly male and 25 to 44 years old. They are university graduates with a high income, high life satisfaction and financial security. As they are more financially secure, they have less stress. Typically, they own a home and are married – though they differ from Professional Families attitudinally. Confident Achievers want it all, and their attitude is “go for it.”

Confident Achievers are most likely to stay in a city once there. They are not motivated to change cities and, in fact, are looking for a city where they can get a complete package: the pay and the benefits they value, including skills development, savings, insurance and retirement. Overall, they are looking for a better life and for employers to help them attain it.



White-Collar Professionals and Graduates

White-Collar Professionals and Graduates typically have skilled professional jobs, such as administration and information technology, or skilled work, such as police or military. Typically younger, they are graduates and on a career path. As such, they are very interested in career advice. This group skews more toward millennials, females and those who are still renting and living with family, which makes them also interested in receiving advice on saving money. They have a medium to high satisfaction with life.



WHITE-COLLAR PROFESSIONALS AND GRADUATES

48%









of workers in this group have
**HIGH LIFE
SATISFACTION**

MOST IMPORTANT FACTORS

Leaving or staying in a city

Choosing an employer in the city

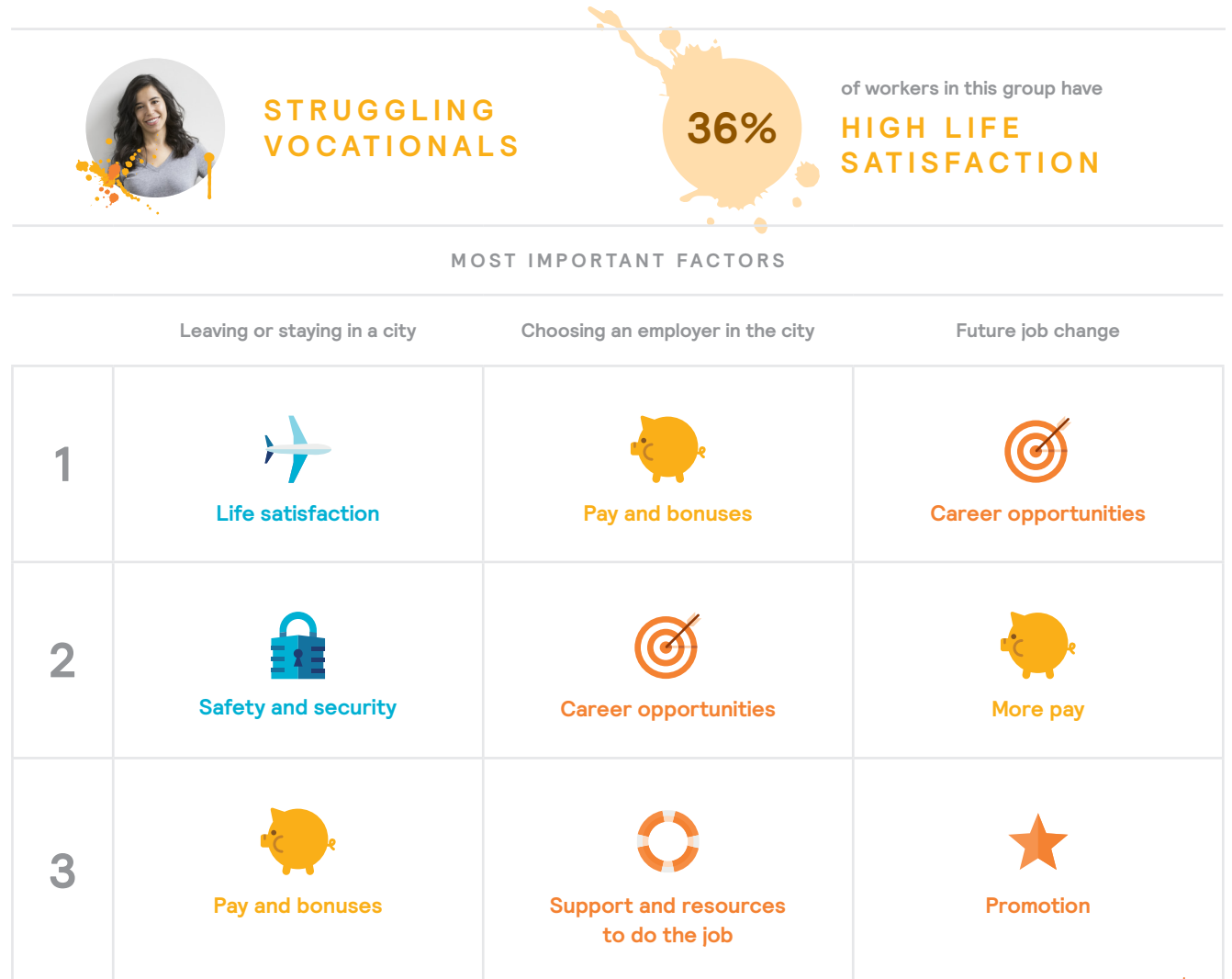
Future job change

	Leaving or staying in a city	Choosing an employer in the city	Future job change
1	 Life satisfaction	 Pay and bonuses	 Career opportunities
2	 Safety and security	 Career opportunities	 More pay
3	 Pay and bonuses	 Worker benefits	 Promotion



Struggling Vocationals

Struggling Vocationals, in most cases, have either a high school degree or a vocational qualification, are in low to medium income jobs, typically are single – the highest proportion of singles in the study – and tend to be younger females. Often, they rent or live with their family. Not surprisingly, they are financially insecure and struggling to get ahead. As a result, they are stressed and motivated by pay. A struggling, financially insecure Vocational wants help getting a better job.



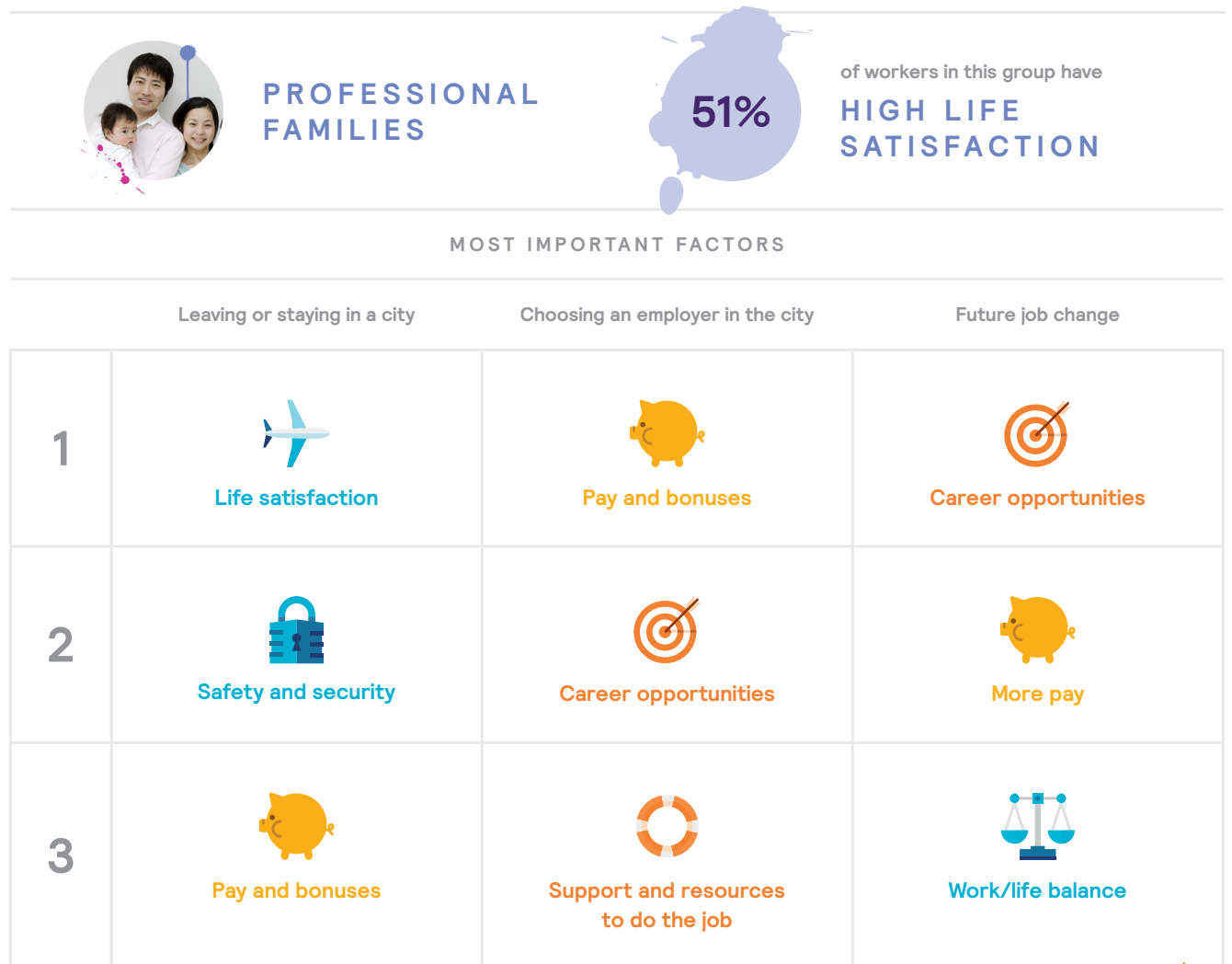
Business Owners and Skilled Tradespeople

Business Owners and Skilled Tradespeople are either self-employed or live close to home, largely working for themselves in trades like building, carpentry or plumbing. This group, which has a low to middle income, is a mix of ages. They are interested in retirement savings, health and wellness, and because they are driven by their skills, they want to improve their professional development. Financially insecure and not particularly well paid, this group wants help finding better jobs, careers and skills development – as well as to improve their health and wellness.



Professional Families

Professional Families are senior professionals with university degrees and higher incomes. Their attitudinal profile significantly differs from that of Confident Achievers: They are more stressed. They travel farther to work than others – many travel over an hour – and they tend to be slightly older and have lower overall satisfaction with life. Given their age, savings and budgeting are important to them. Professional Families – especially those who are struggling more and are moderately stressed – strive harder for work/life balance and seek help with savings, budgeting and reducing travel to bring stability to their lives. White-Collar Graduates, in particular, have greater interest in their careers and seek advice on how to advance, such as finding work in a strong sector.



Motivational Factors By Persona

The segmentation analysis also examined the motivations of each persona to either stay in or leave a city.

Consistent with the study's findings across all participants, overall satisfaction with life is the number one factor. However, other motivations vary across segments. Confident Achievers, as well as Business Owners and Skilled Tradespeople, are more likely to change cities to be closer to family or friends. White-Collar Professionals and Graduates prioritize pay. Overall, life satisfaction is a primary motivator and provides a critical understanding of how workers decide which city to live in and for which employer to work for. Additionally, actual life satisfaction differs significantly across the personas. Among Confident Achievers, 71% would be classified as having high life

satisfaction, based on the Organisation for Economic Co-operation and Development's (OECD) Life Satisfaction Index. Struggling Vocationals tend to have moderate to low life satisfaction. Business Owners and Skilled Tradespeople equally (41%) have high and moderate life satisfaction. Although White-Collar Graduates are just starting their careers and have lower incomes as a result, their life satisfaction is high based on having a career path and, with it, an expectation that their quality of life will improve. A Struggling Vocational faces a range of challenges in trying to break out of a tougher situation and get ahead. These individuals do not have a degree or a well-paying job, are single earners and cannot afford housing. They need help determining how and where to apply their skills. Business Owners and Skilled Tradespeople are very interested in companies helping them be better in their enterprises. They, too, are very interested in professional development.



**CONFIDENT
ACHIEVERS**



**WHITE-COLLAR
PROFESSIONALS
AND GRADUATES**



**STRUGGLING
VOCATIONALS**



**BUSINESS OWNERS
AND SKILLED
TRADESPEOPLE**



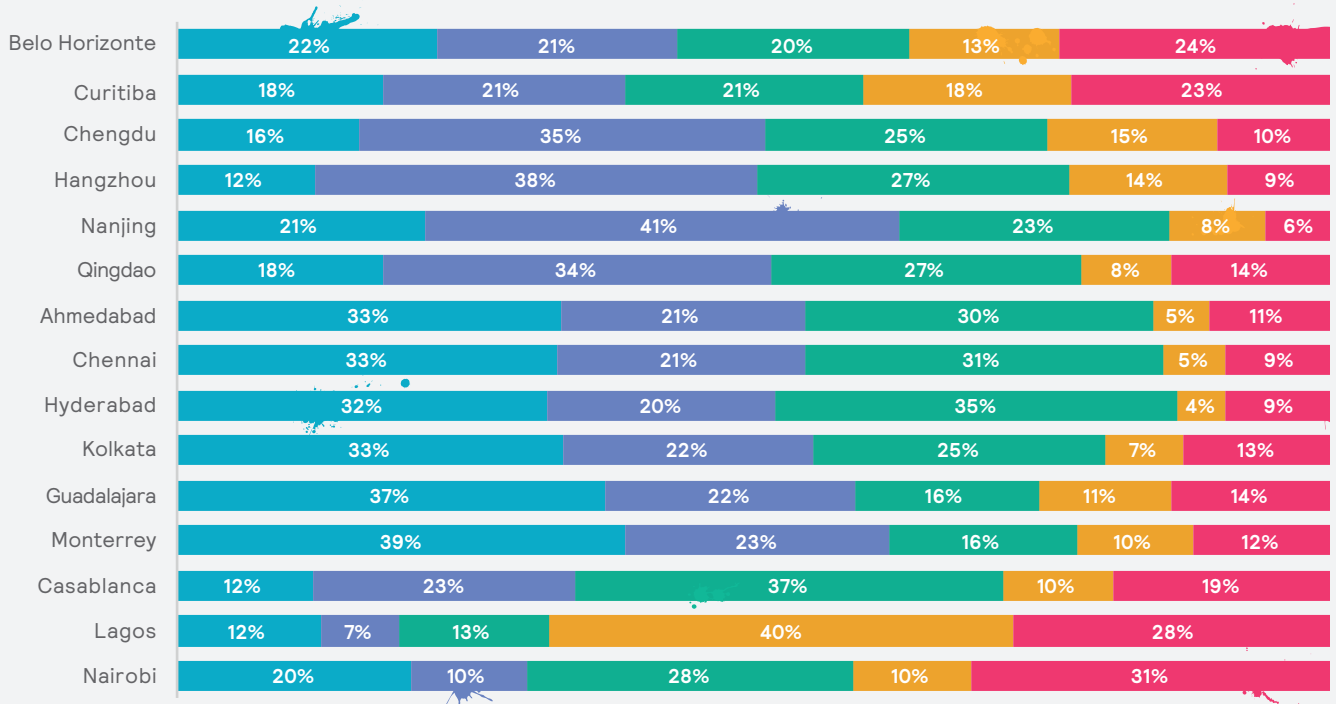
**PROFESSIONAL
FAMILIES**

MOTIVATION

- Financially secure; however, need help with retirement planning
- High appetite for skills development
- Content with life, with the city they live in
- Career focused, value job opportunities and career advancement
- Living healthy and living well important to them
- Seek help with managing stress levels
- Appetite for financial advice
- Motivated by pay
- High appetite for support with independent budgeting and financial planning
- Need help with stress management
- Critical about the city they live in
- Value purposeful and interesting job opportunities
- High appetite for skills development
- Appreciate advice related to savings and financial planning
- Want to live healthy and well
- Critical about the city they live in
- Value work/life balance, health and well-being
- Need help with savings and budgeting for the family
- Content in the city they live in

When it comes to deciding which employer to work for within a city, pay and careers are important to all segments. However, benefits (holiday pay, health insurance, etc.) are quite important to White-Collar Professionals and Graduates, as they are looking for much more of a package. The most likely reasons to change jobs also vary by segment. After pay and careers, Business Owners and Skilled Tradespeople are highly motivated by the opportunity to learn new skills or to change jobs. Professional Families would change jobs for better work/life balance.

Personas by City



Each city has a different balance of personas, so employers need to understand the makeup of their market. The study found many Confident Achievers in India and Mexico; a multitude of Business Owners and Skilled Tradespeople in Nairobi, Lagos and Casablanca, as well as in Brazil; and a higher proportion of Professional Families in China.

- Confident achievers
- Professional families
- White-collar professionals and graduates
- Struggling vocationals
- Business owners and skilled tradespeople

Key Finding #4: Tensions: Worker Expectations Vs. City Performance

What are people’s expectations, and how well are the cities in the study actually delivering on what is important?

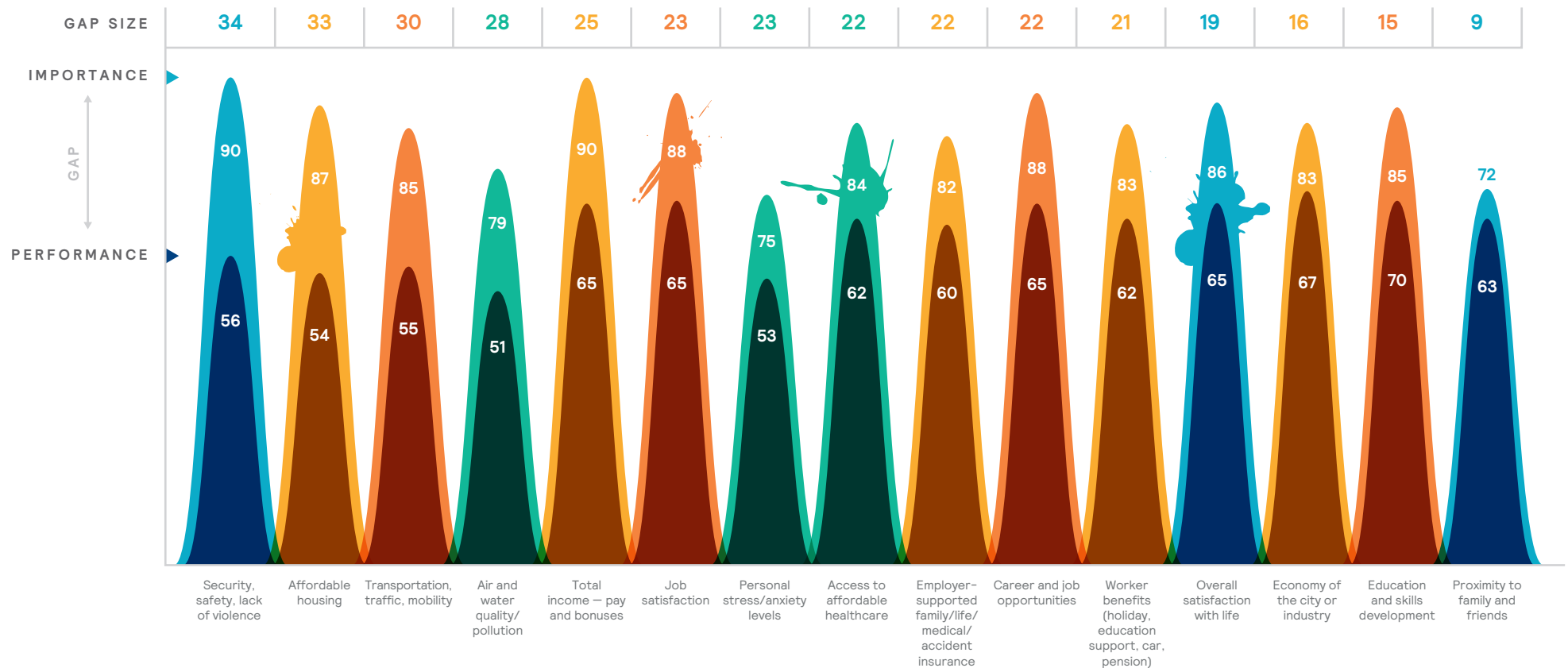
Significantly, most workers say their cities are underperforming. The biggest tension between worker expectations and city performance is in safety and infrastructure. Pollution, personal stress, affordable housing, transportation mobility, safety and security have major gaps and room for vast improvement in meeting workers’ needs

and expectations. These are very real factors that affect how people feel about the cities where they live and work.

For the top three factors – security, safety and lack of violence (1st), affordable housing (2nd) and transportation, traffic and mobility (3rd) – at minimum, a 30-point gap exists between the importance of factors in deciding where to live and work and in performance of the city of residence.

How Do Cities Perform? (Ranked by the Size of the Gap)

Gap between importance of factors for deciding where to live and work, and performance of city of residence



“What needs to be looked at are trends — in particular, in cities or regions in the growth markets — that are making it costlier to live and conduct business in those cities.”

Ardavan Mobasheri, Managing Director and Chief Investment Officer, ACIMA Private Wealth



Although, in the cities studied, these significant gaps function at the city level, public-private partnerships would help facilitate the necessary improvements. The secondary needs – ranging from income to job satisfaction, career opportunities, stress and affordable healthcare – are areas where employers have opportunities to significantly control or contribute.

In looking at all the countries, these important gaps – particularly affordable housing, security and safety – are common in all regions. However, some factors are specific to certain countries – for example, pollution is higher in India, and the gaps in security and safety are much higher in countries like Brazil, Mexico and Morocco. Gaps in affordable housing and income are higher in China.

The Largest Gaps by City

How important are the following factors for you when deciding where you will live and work in the next 1-5 years?
How well do you think your city is performing?



	1. Ahmedabad, India	2. Belo Horizonte, Brazil	3. Casablanca, Morocco	4. Chengdu, China	5. Chennai, India	6. Curitiba, Brazil	7. Guadalajara, Mexico	8. Hangzhou, China
1	Air and water quality/pollution	Safety and security	Safety and security	Affordable housing	Air and water quality/pollution	Safety and security	Safety and security	Affordable housing
2	Pay and bonuses	Transportation and traffic	Personal stress, anxiety	Pay and bonuses	Affordable housing	Affordable housing	Transportation and traffic	Pay and bonuses
3	Career opportunities	Affordable housing	Transportation and traffic	Air and water quality/pollution	Safety and security	Pay and bonuses	Affordable housing	Worker benefits
4	Transportation and traffic	Affordable healthcare	Air and water quality/pollution	Worker benefits	Transportation and traffic	Career opportunities	Air and water quality/pollution	Personal stress, anxiety
5	Worker benefits	Career opportunities	Affordable healthcare	Employer-supported life/medical insurance	Weather and city climate	Worker benefits	Worker benefits	Job satisfaction

The Largest Gaps by City

How important are the following factors for you when deciding where you will live and work in the next 1-5 years?
 How well do you think your city is performing?



	9. Hyderabad, India	10. Kolkata, India	11. Lagos, Nigeria	12. Monterrey, Mexico	13. Nairobi, Kenya	14. Nanjing, China	15. Qingdao, China
1	Pay and bonuses	Career opportunities	Affordable housing	Safety and security	Affordable housing	Affordable housing	Affordable housing
2	Air and water quality/pollution	Job satisfaction	Job satisfaction	Air and water quality/pollution	Safety and security	Air and water quality/pollution	Pay and bonuses
3	Worker benefits	Pay and bonuses	Pay and bonuses	Transportation and traffic	Air and water quality/pollution	Pay and bonuses	Worker benefits
4	Affordable housing	Air and water quality/pollution	Employer-supported life/medical insurance	Weather and city climate	Transportation and traffic	Worker benefits	Employer-supported life/medical insurance
5	Transportation and traffic	Economy	Life satisfaction	Personal stress, anxiety	Pay and bonuses	Affordable healthcare	Career opportunities

There is good news. The participants in the study say the cities in which they live do quite well in terms of cultural and economic factors — and life satisfaction, career opportunities, proximity to airports and green spaces are already meeting expectations.

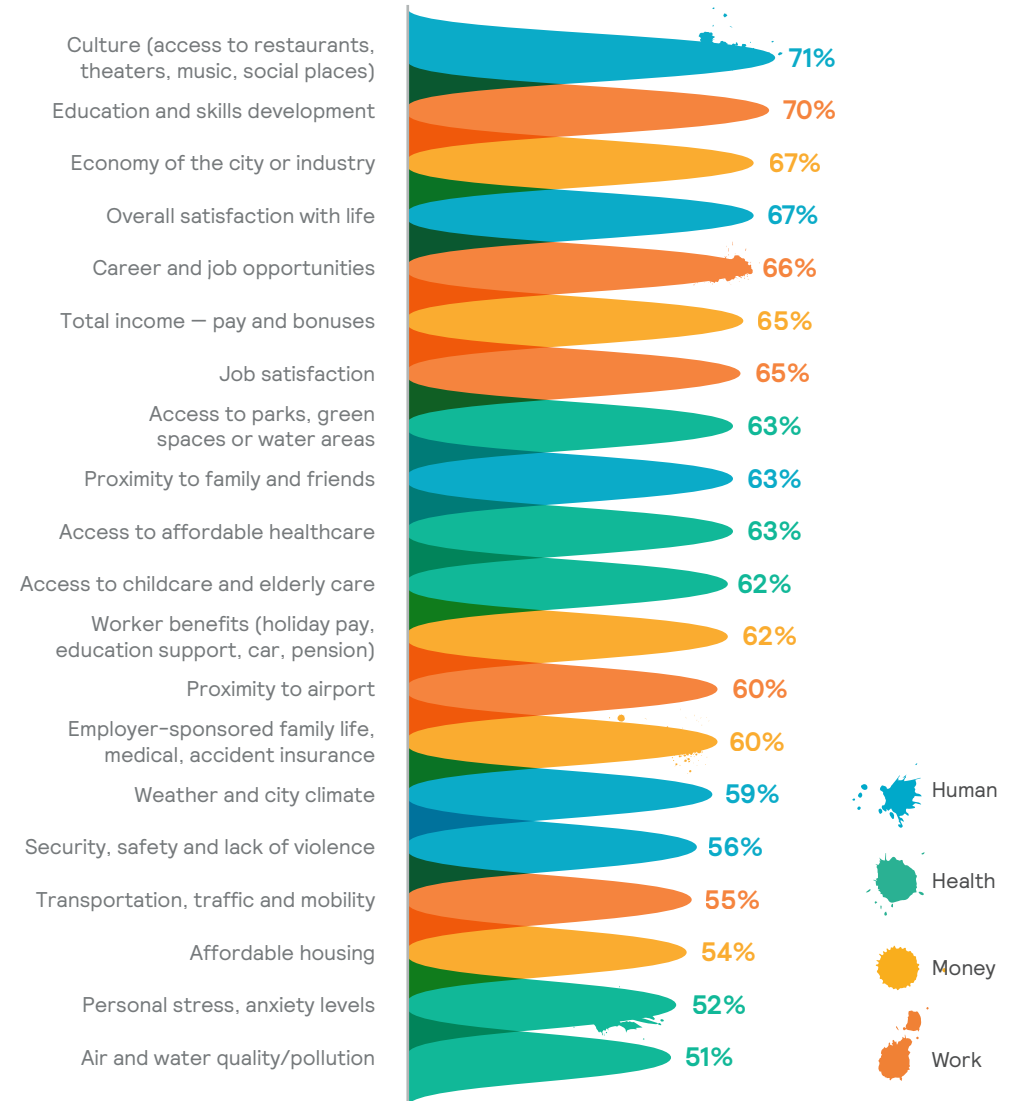
Although accepting of longer travel time to get to work, people are looking for easy access — within 15–20 minutes of where they live — to services such as supermarkets, banks, restaurants, public transportation, schools and healthcare. The importance of such access cannot be understated, as these establishments meet both basic and social needs.

Nearly half of the survey participants (43%) place importance on easy access for serious or urgent medical care by a doctor or hospital. Relatively few are thinking about telemedicine, smartphones, apps or even public hospitals in different cities, presenting an opportunity for employers to address these needs.

The priorities are the big issues that involve infrastructure and require a cross-section of groups and public-private partnerships to come together and develop solutions. These factors come into consideration before income. Critically, although the big factors are the big factors everywhere, each city needs its own strategy.

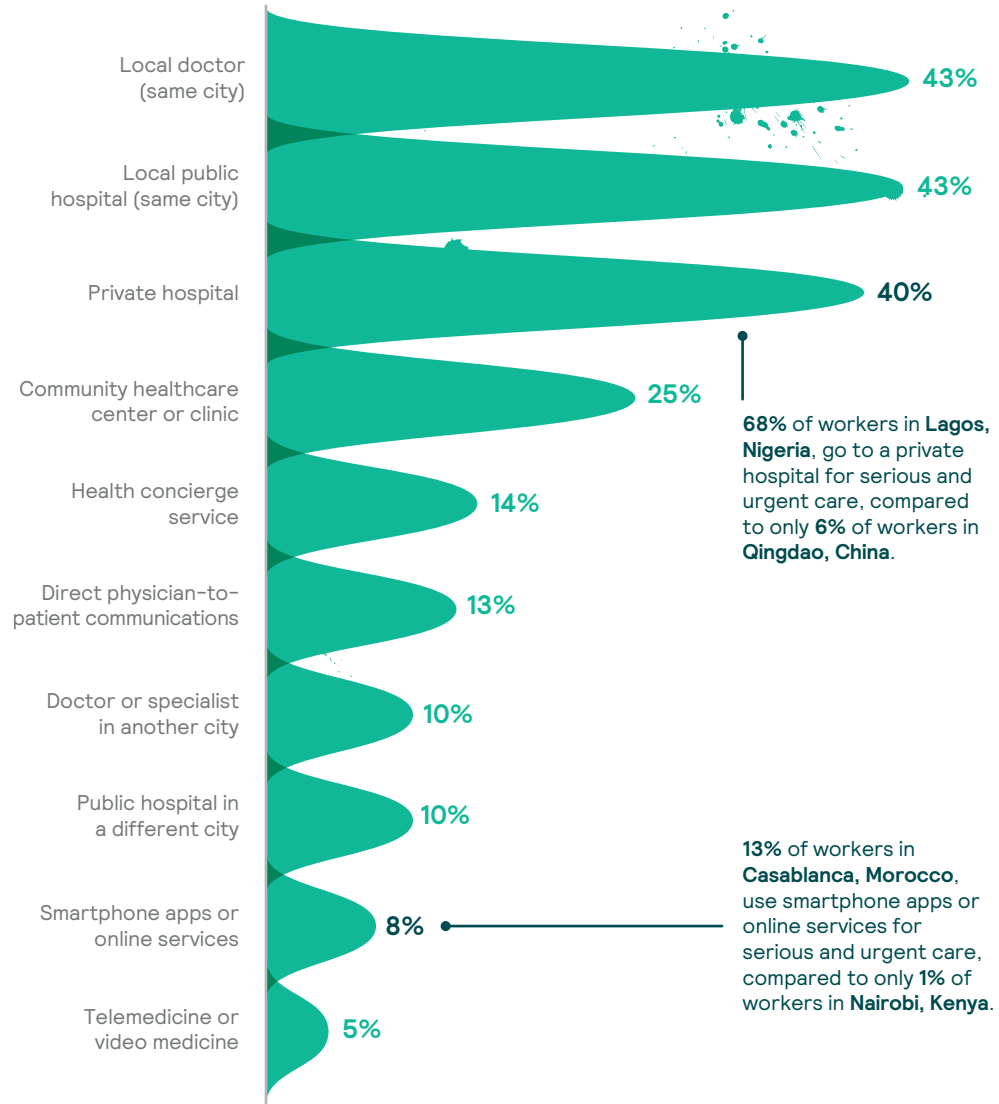
Cities Do Best on Culture, Worst on Health

How well do you think your city is doing?



Healthcare Options for Urgent Health and Medical Care

Where do you go now for serious or urgent health and medical care? Please select any of the following healthcare options or sources that you have access to.



Performance Progress

Although the study's 15 current and future megacities share some commonalities, differences exist as well. Some, but not all, are country-related — a measure of investment (or lack thereof) at the national level in key factors, such as transportation, infrastructure and safety.

Based on a city's current performance against each of the four factors, we have grouped them into three stages of progress and how a city measures up against workers' expectations: Advanced, Progressing and Approaching.

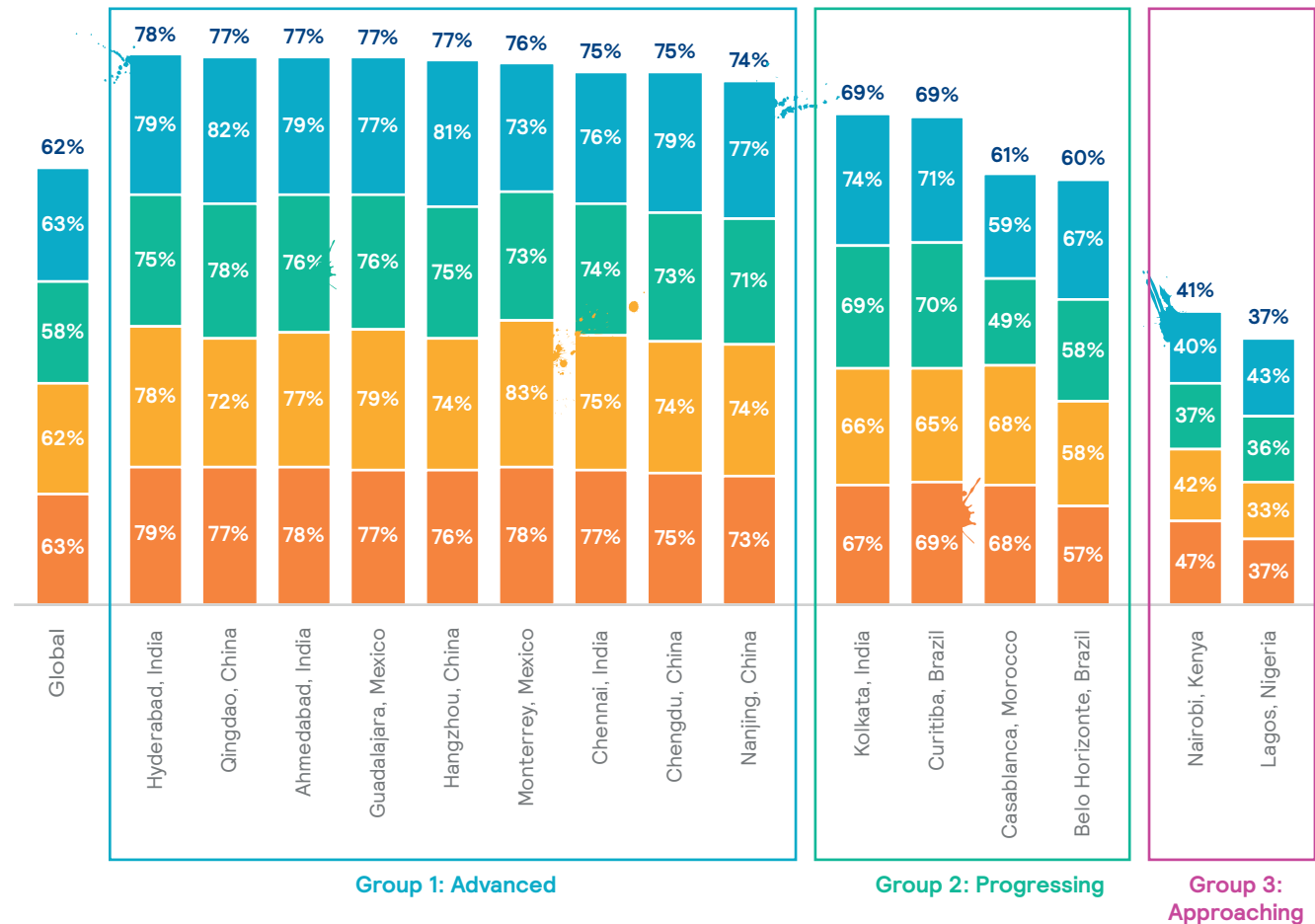
Generally, *Advanced* cities score well in all four sets of factors — Human, Health, Money and Work — with a small to medium gap between workers' expectations and the city's performance. Life satisfaction is high or very high and stress is at low to medium levels.

Cities that are *Progressing* have a midsize gap between expectations and performance. These cities have a high rating for human factors yet rank slightly lower for work- and money-related factors. Health factors rate the lowest among the four sets of factors in these cities. Half of the workers in these cities describe their life satisfaction as high. Stress is higher in this group — at medium to high levels.

Rankings for *Approaching* cities are low across all four dimensions, creating the biggest gap in expectations versus performance and the lowest general life satisfaction among the three groups. At medium to high, stress levels are the same as those in the Progressing cities.

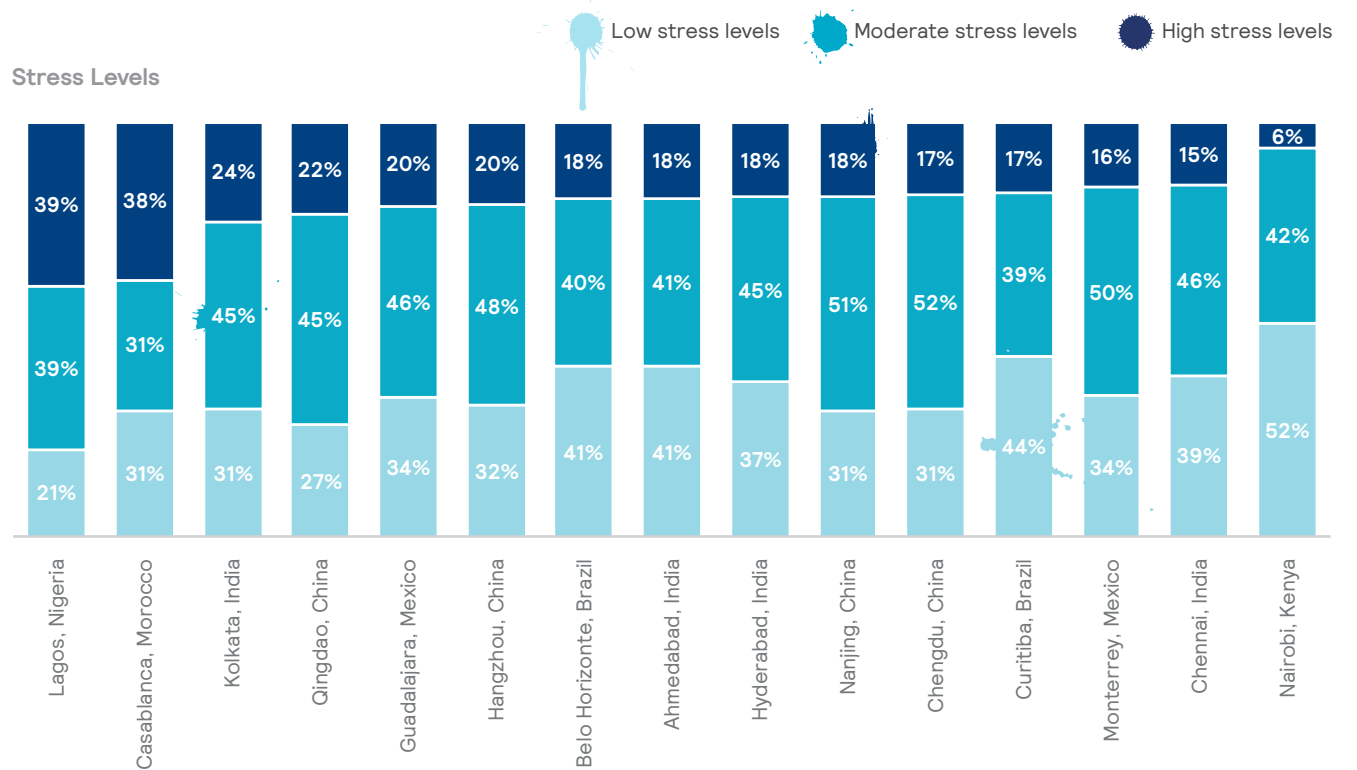
Notably, even within a country, satisfaction can vary significantly across cities. This is noteworthy, as overall life satisfaction is the top-ranking reason workers choose to move to a new city.

Global City Index



	Cities included	Description	Size of the “gap”	General life satisfaction	General stress levels
Group 1: Advanced	Ahmedabad, Chengdu, Chennai, Guadalajara, Hangzhou, Hyderabad, Monterrey, Nanjing, Qingdao	Generally, cities do well on all four dimensions. Highest rating of the human factors (77); consistent ranking for money and work (76). Health factors ranked lowest (74).	Small to medium	High or very high Less than 10% of workers were unsatisfied with their current life.	Low to medium On average, less than 20% of workers in the city have high stress levels.
Group 2: Progressing	Belo Horizonte, Casablanca, Curitiba, Kolkata	High rating for human factors (76); slightly lower for work (65) and money (65). Health factors ranked lowest (61).	Medium	Medium to high 50%+ of workers have high life satisfaction, with the exception of Casablanca (23%).	Medium to high On average, over 37% of workers in the city have moderate to high stress levels.
Group 3: Approaching	Lagos, Nairobi	Cities lag on all four dimensions. Low human satisfaction (42) and work (42) scores; consistent low ratings for money (37) and health (36) factors.	High	Low 14%–16% of workers have life satisfaction.	Medium to high Over 48% of workers have moderate to high stress levels.

Interestingly, stress levels vary across cities within some countries, such as in India (Kolkata at 24% vs. Chennai at 15%) and China (Qingdao at 22% vs. Chengdu 17%). Stress levels not only are a contributing factor to quality of life but also correlate to a city’s performance. The locations where workers have the highest life satisfaction and are the least stressed are the cities that are performing well and where people prefer to live.



Key Finding #5 Humanity, Technology and the Future of Work

In studying the future of cities and attracting the people to power them, it is critical to look at the impact of automation, artificial intelligence (AI) and robotics, and how these advancements will affect work, the workforce of the future and, critically, the importance placed on people.

Workers and employers agree on the positive effects of automation, AI and robotics, yet they differ on the negative impact. Almost equally, both employees (43%) and employers (46%) believe work will become more efficient with AI. The gap widens when both groups are asked whether AI will help in making smarter or faster decisions (35% employees vs. 44% employers). Workers think about technology as a means to enable them

to make smarter decisions and help build skills — not as something that will replace them. Essentially, as people, workers focus on the beneficial aspects of AI, automation and robotics.

“The interesting phenomenon related to AI is why all of a sudden we’re realizing it now. What we called neural networks back then we call AI today. So the question becomes, what are the new jobs that are going to be created that we don’t know of today?”

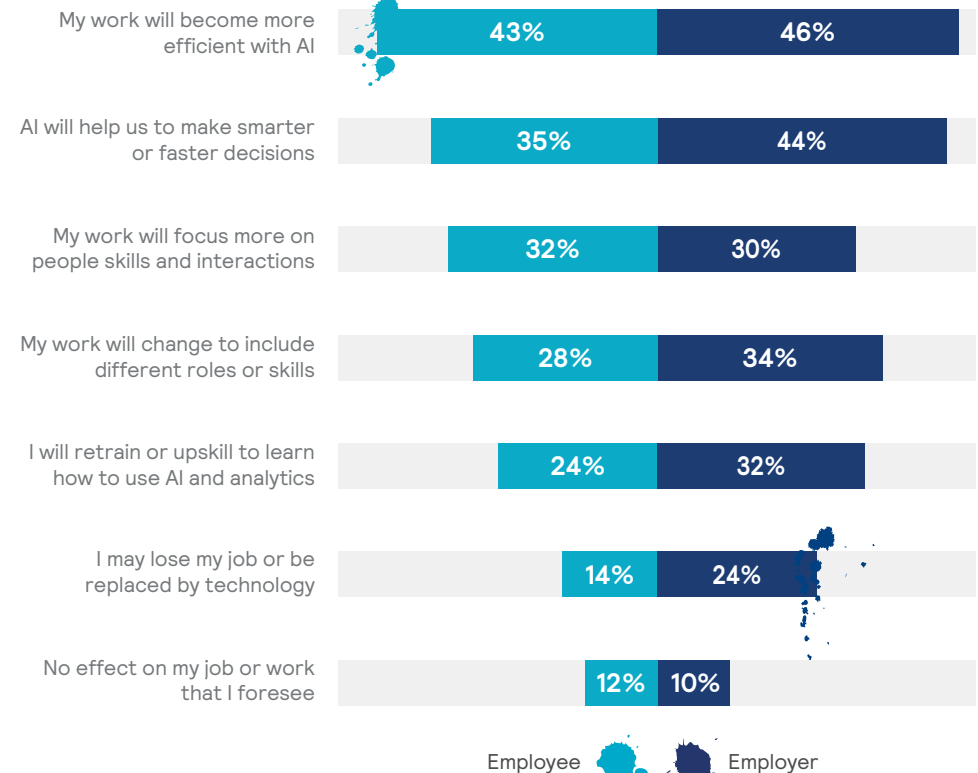
Ardavan Mobasheri, Managing Director and Chief Investment Officer, ACIMA Private Wealth

“Automation is fundamentally going to take away lower-level, knowledge-based work. And the question is, will that human capital then be redeployed to higher levels, not so task-specific work? How can we use insights from automation to make better judgments, to identify new products and solution opportunities, to see the white space in an otherwise previously linear picture? What new vistas will automation enable as opposed to what work will automation destroy?”

David Anderson, President, International, Mercer

Automation, Robotics and AI

How might automation, robotics or AI affect how you work in the next 5-10 years?

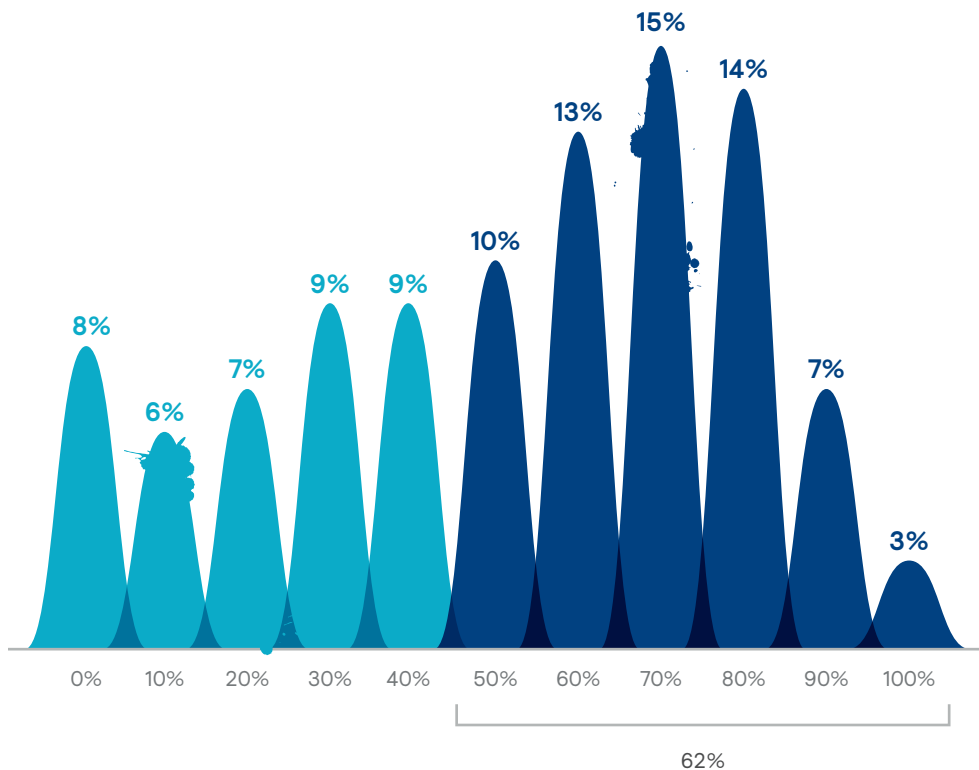


When asked to provide a percentage (from 0 to 100) to describe how many tasks could be replaced by AI within five to 10 years, 62% said more than half of their tasks could be replaced.

Globally, only one in five people are confident that they are not going to lose their job in the next five years. The remainder, who are worried, point to external factors that could impact their employment – a change in the economy (35%) or at the company (33%). Only 16% attribute their concern to automation, robotics or AI. By contrast, employers say that the main reasons for laying off workers in the next five years will be performance issues and automation, robotics and AI.

Impact of AI

How many of your current tasks could be replaced by AI within 5–10 years?

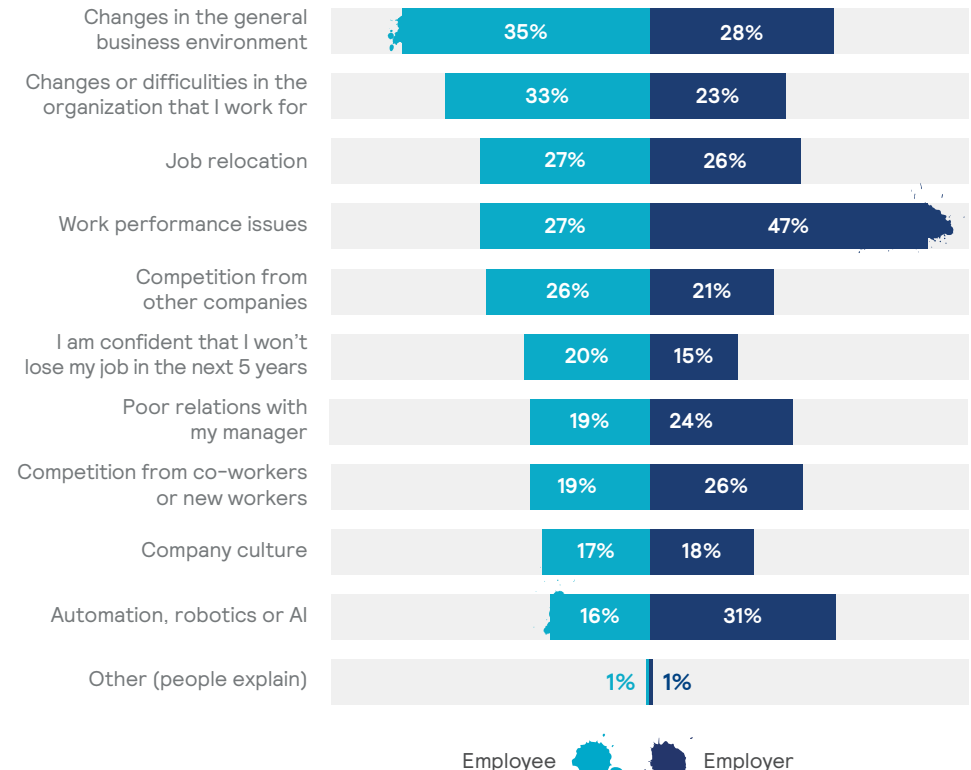


Although both agree that the external environment is important, employers are placing much more importance on performance and automation.

People recognize that to keep up with advances in technology, they will need to learn new ways of thinking and working. In fact, 94% of workers cite continuing to develop professional and personal skills as important.

Reasons for Potential Job Losses

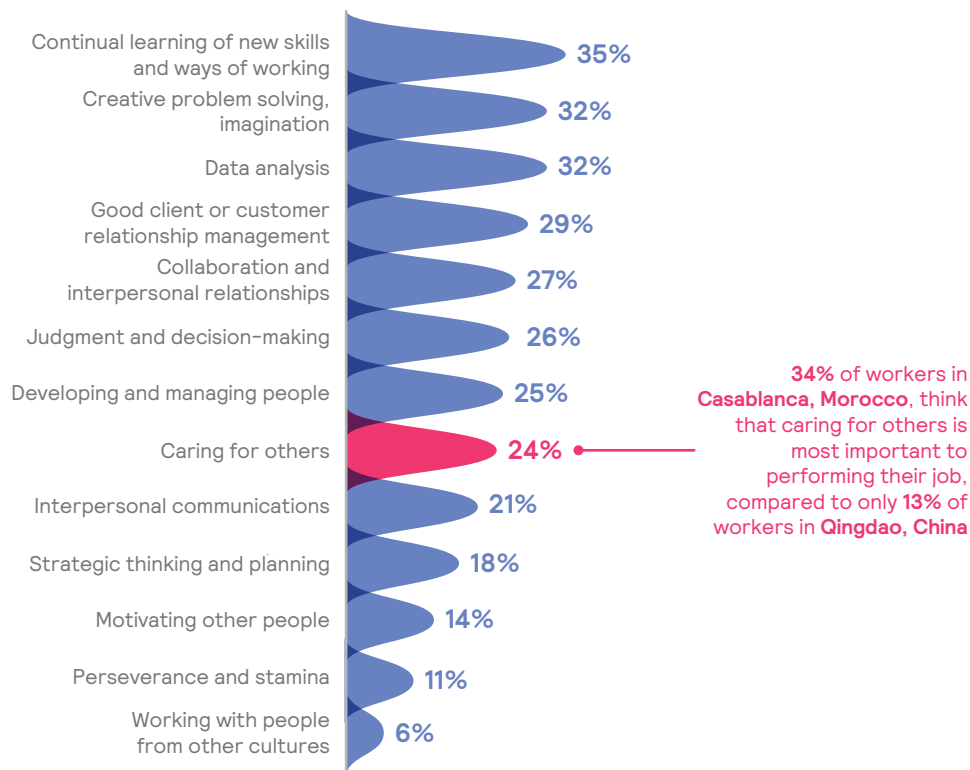
What are some of the reasons that you could lose your job, in the next 1–5 years?



For companies to be competitive, they must understand how the workforce is changing and be careful to value the uniquely human capabilities that power organizations. In pursuit of new technologies, it is easy to lose sight of how people connect and collaborate across cultures, solve business problems creatively, tend to clients and customer needs, as well as co-create and innovate.

Skills and Attributes to Job Performance

Please rank the skills or attributes below based on how critical they are to you performing your job.



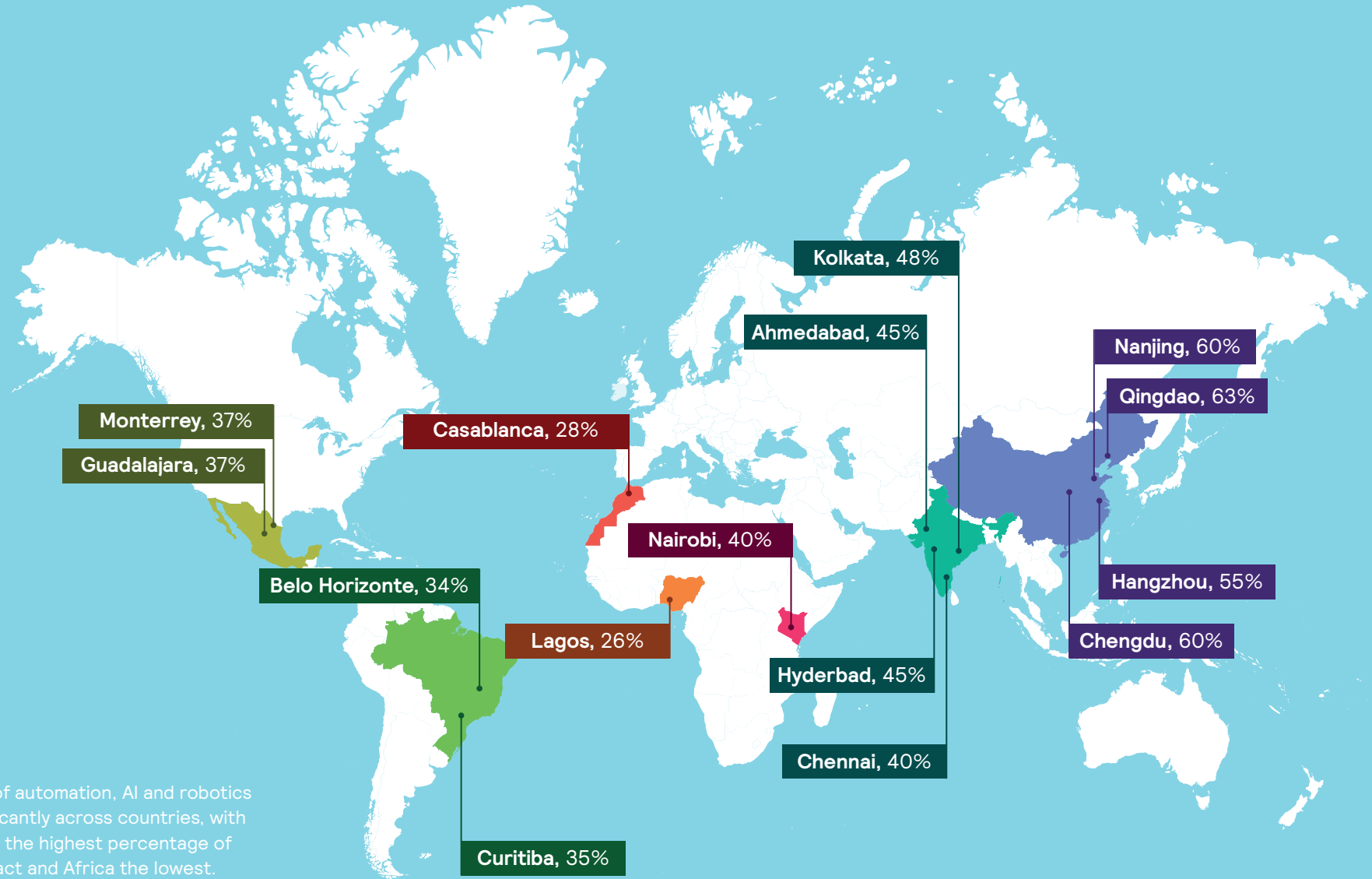
“I think the first big guess is about whether technology will finally, truly become a real danger for human employment or, yet again, not. There’s the second story around to what extent physicality still matters. And that brings us to the heart of cities. So far, we seem to appreciate physical proximity just as much or even more now in a digital age than before, but that also depends on how much these technologies are able to simulate proximity, cultural and social exchange.”

Philipp Rode, Executive Director of LSE Cities and Associate Professorial Research Fellow, London School of Economics

“We have hired over 100 digital natives, or digital professionals, to help us spread new ways of thinking and working in the organization. We are very experienced in hiring chemical engineers, mechanical engineers electrical engineers, as well as architects, civil engineers, and other construction-related professionals. Now, we are also hiring people with an expertise in user experience, user interface and different kinds of digital capabilities as part of our effort to transform our culture and our digital capabilities.”

German Alvarado Paredes, Global Organization and Compensation Director, CEMEX

Impact of Artificial Intelligence



The impact of automation, AI and robotics varies significantly across countries, with China having the highest percentage of positive impact and Africa the lowest.

Impact of AI

62% of workers believe that more than half their tasks could be replaced by AI within the next five to 10 years.

In your opinion, how many of your current job tasks could be replaced by automation, robotics or AI in the next five years?

Key Finding #6

Public-Private Partnerships Essential to Close Performance Gaps

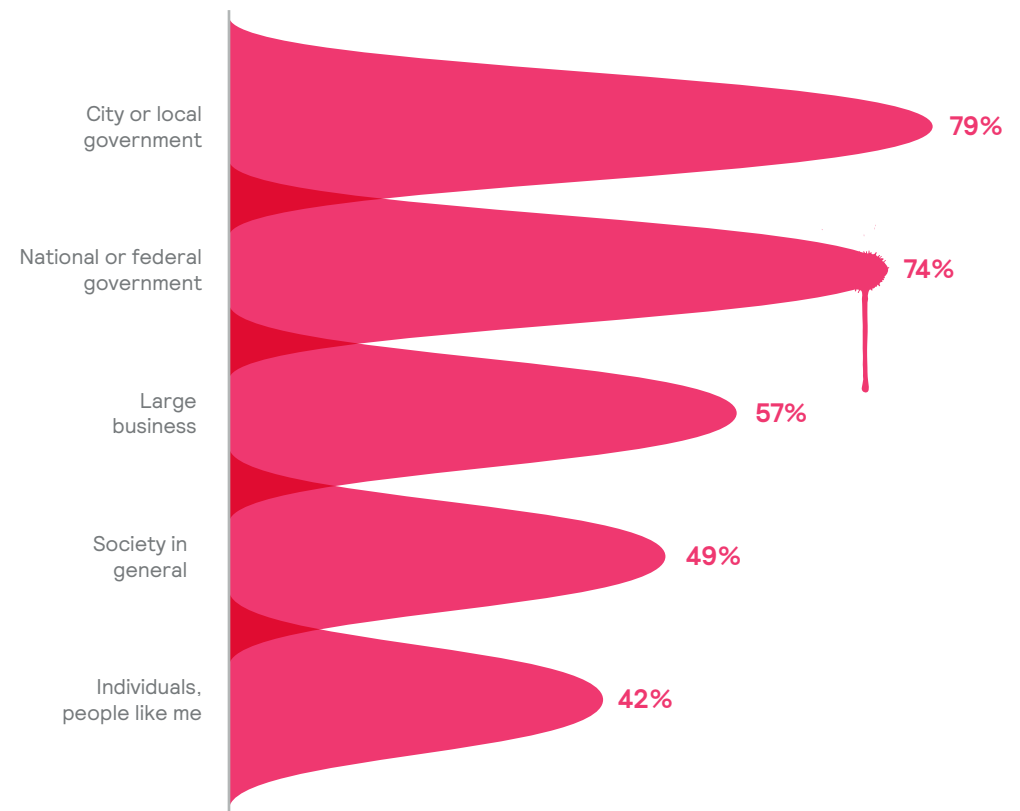
For a city to close the expectation/performance gap and provide critical infrastructure, systems and services for people to come and enjoy living there, a coordinated planning effort among governments, workers and businesses will be required. By understanding what motivates workers to move and stay, businesses have a critical role to play as the voice of workers to help educate and shape a city based on actual needs — from macro (transportation, health and safety) to hyper-local (proximity to services and family and friends).

Workers do not expect any one group to be responsible for addressing the systemic issues of a city. According to the study, workers expect the city or local government (79%), national or federal government (74%) and large businesses (57%) to play a role in making cities more attractive and in meeting their top needs for overall life satisfaction, safety and security, and income. They place the lowest expectations (42%) on individuals, or “people like me,” to achieve these objectives.

In taking all the factors into account when deciding whether to move to a city, not surprisingly, people want it all. They want a nice city. They want a good job. They want to have access to local doctors and good schools. They want a good salary and benefits. They’re expecting everything from the city level to the hyper-local level. Essentially, they are looking for the big institutions that have the resources, the planning and the permission to effect change and deliver a desirable quality of life. They also expect that cities and federal governments are going to work together to achieve this.

Playing a Role in Closing the Performance of a City

Thinking still about the important factors in your decisions to either stay in or to leave your city in the next 1–5 years — who do you believe is the most and least responsible for providing those (ranking by top three — 1st, 2nd, 3rd combined)?



Employers also cannot meet these needs alone. Multi-employer trade groups and workers themselves must play a role. The critical, high-ranked decision-making factors with the biggest gaps — quality of life, safety and security, and infrastructure — function at a city level. To address the scope of such issues and challenges, businesses and local governments will have to join forces to address basic needs, such as mobility, healthcare and safety. For example, while the city focuses on improving roads and public transportation, businesses can provide flexible hours, enabling workers to commute during off-peak traffic times.

If employers do not represent the needs of workers, there is no guarantee cities will do so in a way that will truly be attractive to them. To accurately represent those needs, employers must also broaden their thinking and recognize that career and job opportunities are not

sole motivators. In growing cities, leading companies are stepping into the fray and finding new ways to address the needs of workers and ensure their safety and well-being. They are providing housing for workers in desirable areas, providing service buses for transportation to and from work, moving families and locating offices close to desirable residential areas with facilities.

Cities must also design for the future, not for the past. It seems obvious to note that the future of work will not be the same as it has been — it will be more services- and IP-driven as well as more spread out geographically. So it stands to reason that the design and functionality of tomorrow's cities must evolve accordingly with tomorrow's jobs. For future cities and the future of work, it is as important to have high-speed broadband as it is to have highways.

“We needed to have noncompetitive private-sector input and made sure we got the wide perspective of the private sector — from the design engineering companies to the construction companies to the investors — to try to make sure the projects were designed in such a way that they would be attractive to contractors and, ultimately, attractive to investors.”

Alice Charles, Project Lead, Cities, World Economic Forum

“In the beginning [in China], you had these first-tier cities that people moved to and gathered around. This kind of economic momentum has been applied to second- and third-tier cities, so now in even smaller towns and smaller cities on the periphery of third-tier cities, people can live in them and actually make a living and still access these second- and third-tier cities that are now very economically viable places. A lot of it has to do with logistics.”

Wade Shepard, Author, *Ghost Cities of China*

“Hangzhou, for example, sees itself as a global marketplace, not a national or local one. The city needs help gaining access to worldly skills, particularly around technology programming, as it cannot satisfy current demand and its growth ambitions without solving for that — or without helping local companies to solve for that. To do so, the city is looking to facilitate partnerships between the local municipalities, the trade associations and privately owned companies to create a high-skills talent exchange.”

David Anderson, President, International, Mercer



04

Four Imperatives for Success

Cities, businesses and people all have an unprecedented opportunity to succeed in untold, new ways.

To succeed, we must:

Imperative #1/ Put people first: Listen and focus on what matters most.

People drive the growth of the world’s current and future megacities. Competition is fierce between and within these cities when it comes to attracting the best talent. It is critical that companies focus on developing their talent and ensuring that talent will want to stay with the organization once gainfully employed.

And employers can’t discount the significant risk in making sweeping generalizations and treating people as one homogenous group. We have discovered meaningful gaps between what workers value and what employers believe are important to employees when deciding to move, to stay or to leave a city or the organization. Employers also have an opportunity to deliver value as an advisor

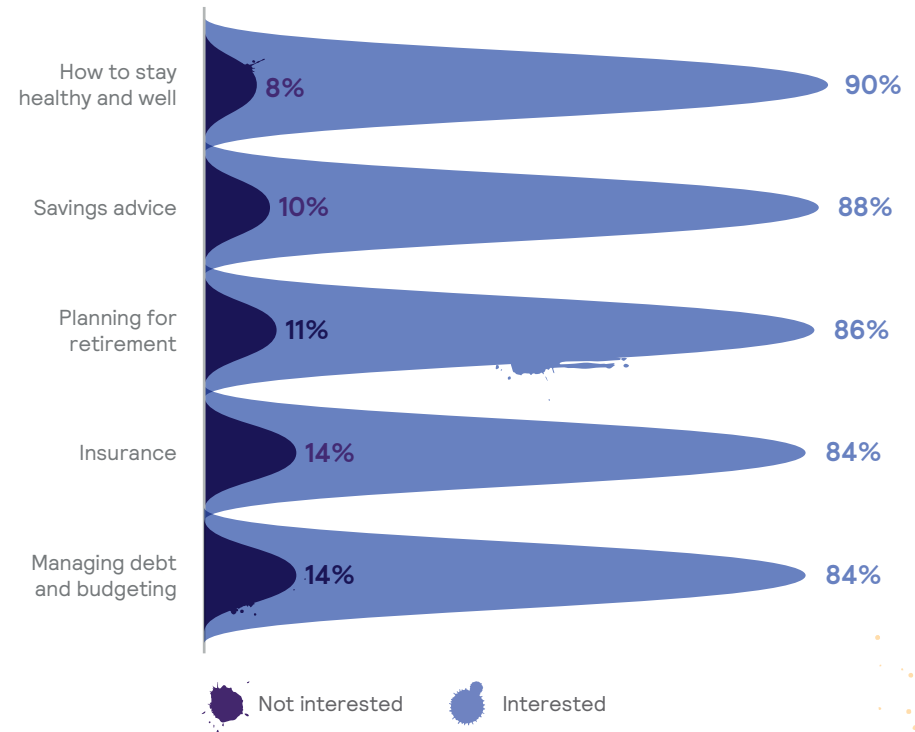
and provide tailored benefits, such as pensions and professional development.

Workers rank overall satisfaction with life, security, safety and lack of violence along with proximity to family and friends at the top of their considerations when deciding whether to move to or leave a city. Meanwhile, employers believe career and work opportunities, work satisfaction, and pay and bonuses are leading considerations. Albeit important, employers would be remiss in focusing entirely on work-related factors and not listening to the entirety of people’s needs — including very pressing social and human desires — when seeking to attract the best talent.

This requires understanding the totality of needs across four dimensions: human, health, money and work. We believe the organizations that are willing to listen to and meaningfully respond to people’s personal, social and work needs will be the most successful in talent attraction and retention.

Advice and Support Provided by the Employer

If your employer were to provide you with advice or support in the following areas, how interested would you be in receiving help and support?

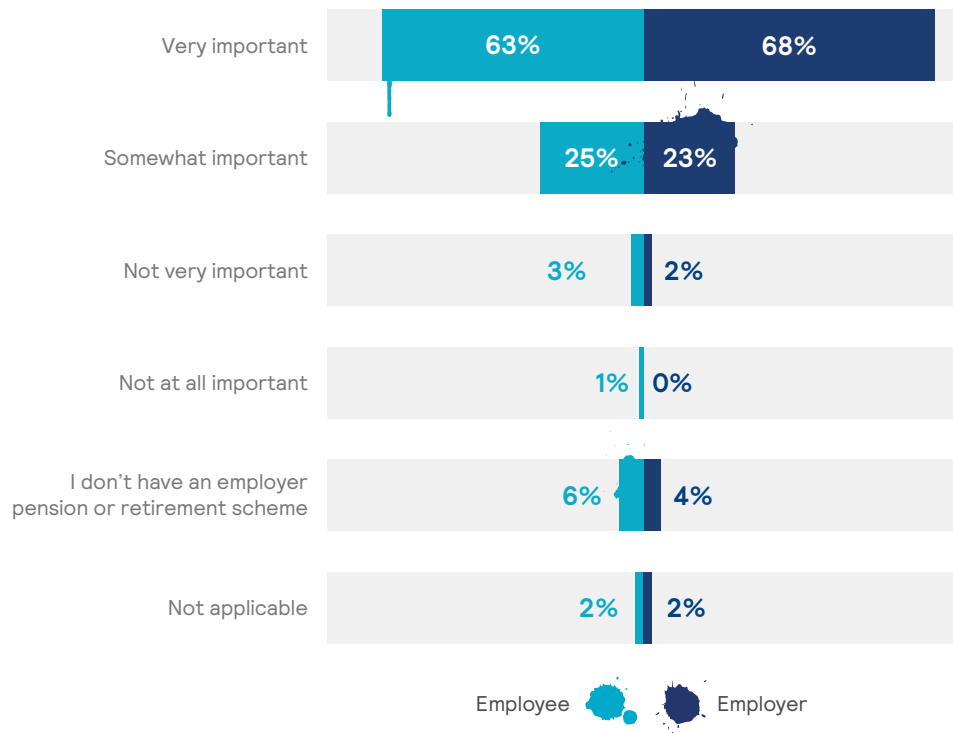


“In India, some of the more enlightened employers are taking it upon themselves to either do their own training or talk about training programs in Singapore that they would avail for their more experienced staff.”

Alice Charles, Project Lead, Cities, World Economic Forum

Employer-Sponsored Pension or Retirement Scheme

How important to you is having an employer pension or retirement savings scheme that you could transfer to another employer or keep personally independent of your employer?



Benefits at Work

How important to you are having the following opportunities and benefits at work? Please rate each in importance.



Imperative #2/ Think holistically and customize meaningful offerings.

To understand the nuances of workers in the 15 cities, we went one step further and investigated the needs of people based on their demographics, life stages, career progressions, predispositions to lifelong learning, aspirations and levels of financial security.

This resulted in a segmentation study of five personas — all backed by data, analytics and insights. We call them Confident Achievers, White-Collar Professionals and Graduates, Struggling Vocationals, Business Owners and Skilled Tradespeople, and Professional Families.

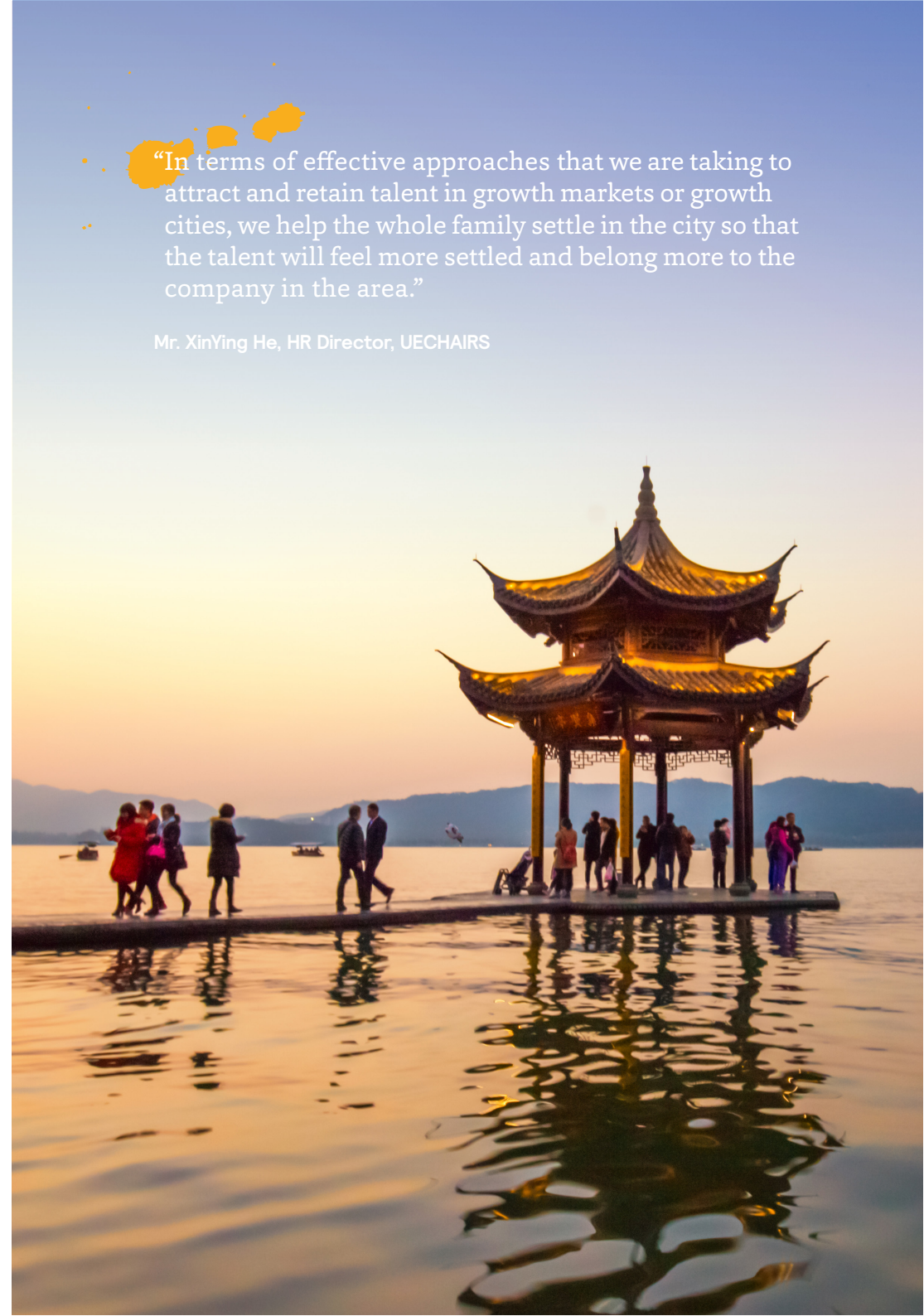
Confident Achievers tend to be executives and senior professionals with high incomes and high life satisfaction. They are typically married and own a home. Attitudinally, they “want it all,” seek constant skills development and, although financially secure, need help with retirement planning.

By contrast, White-Collar Professionals and Graduates are millennials who are career-focused and generally satisfied with their city life. They need the most help with how to get ahead. This group, along with Confident Achievers, is significantly more likely to be interested in advice from their employer on every topic, including staying healthy, savings, retirement planning, insurance, managing debt and budgeting. White-Collar Professionals and Graduates are looking for health and well-being with the future in mind — they expect their employers to help them now to plan for the long term. Although advice on how to stay healthy ranks first for older workers, they are actually less reliant on employers. Critically, knowing each persona’s particular needs is key to determining tailored offerings.

Each persona’s set of needs is unique, and each has different drivers; using this knowledge, employers should take a targeted approach. Armed with deeper understanding, organizations can and must tailor their solutions, approaches and communications to the individual needs of each group to ensure that workers in each persona feel empathetically understood.

“In terms of effective approaches that we are taking to attract and retain talent in growth markets or growth cities, we help the whole family settle in the city so that the talent will feel more settled and belong more to the company in the area.”

Mr. XinYing He, HR Director, UECHAIRS



“We are seeing the breakdown of government providing for the people. For the first time, businesses have been asked to take the hero’s journey and make the world a better place for their employees. Likely, that wasn’t a mandate prior for CEOs to, first and foremost, create a journey, a life cycle, a future for their people. Therefore, for those companies that are able to rise to the occasion, the reward is formidable – they will be able to attract and retain top talent. Then, certainly they will be very well positioned as on trend and in line with a mission – values that resonate deeply with their people.”

Hope Frank, Global Experience Officer, Mercer

Workers are not one homogenous group. One size does not fit all.



**CONFIDENT
ACHIEVERS**

Help them to get it all



**WHITE-COLLAR
PROFESSIONALS
AND GRADUATES**

Help them to get ahead



**STRUGGLING
VOCATIONALS**

Guide them to financial
planning and savings



**BUSINESS OWNERS
AND SKILLED
TRADESPEOPLE**

Partner with them on
skills development and
well-being



**PROFESSIONAL
FAMILIES**

Help them to find
work/life balance
and with savings
and budgeting

Imperative #3/ Prioritize humans (not robots) for a competitive advantage.

With the global economy strong and rapidly growing, and as technology continues to swiftly evolve, how can human skills, talents and attributes remain a competitive advantage?


Cities and businesses are at varying degrees of adopting AI, robotics and greater automation. They can succeed by putting people at the center of the future of work, AI and robotics — not the other way around.

Never before have customers been so well informed and connected — and, as a result, have little tolerance for anything less than a stellar experience from their suppliers. With routine activities increasingly being automated by AI and robotics, customers' expectations are even higher when they need help with sophisticated and complex issues. By offering superior customer service — which requires an upgrade in creative problem-solving, personal accountability, cross-cultural collaboration and empathizing — organizations can protect their products and services from becoming commodities.

Jobs that historically could be delivered on the merit of technical excellence will no longer be relevant if the jobholder does not possess critical human skills. It may seem counterintuitive, given technology's pivotal role in everything we do, but in many ways, technology elevates behaviors and attitudes over technical skills.

As we move toward higher levels of technological achievement, technology will be designed with humans at the center, making it more and more humane. In the future, work will be less about “using” technology (which implies technical skills) and more about “interacting” with technology (which implies interpersonal skills). Put another way, technical skills will become the “means to compete” and human skills the “competitive advantage.”

This could not be truer for some of the world's faster-growing cities — unencumbered by the legacy systems of their larger and more established brethren — that have the ability to leapfrog and achieve smart(er) cities with smart(er) workforces.



“[In China], tech, automation and AI are a core national ambition. I can see them actually having a functional role as these highly skilled, lower-level workers become less and less available, because nobody wants to do [this work] anymore. These women don't want to be soldering circuit boards all day long. This is pretty much the last generation where we're going to see an excess of young women that are going to essentially be solderers. Their kids are not going to want to do this. And, I think that most of this will be automated. Every time I go into a Chinese factory, I'm always really surprised at how much human labor there still is. How many rows and rows of humans are putting together phones and computers by hand. I don't see that continuing into the future.”

Wade Shepard, Author, *Ghost Cities of China*

“There are specialty schools in China that train the operators on how to maintain the machines and how to operate with a fully automated line. Even if there are employees who are not suitable for automated manufacturing industries, the service industry, like the financing industry, is growing really fast in China, so the next generation needs to choose their career path more smartly to focus more on service-focused industries instead of manufacturing.”

Mr. XinYing He, HR Director, UECHAIRS

“As part of going through a digital transformation, we are evolving our culture, integrating different ways to work like the ‘agile’ and ‘design thinking’ methodologies. With this kind of effort, it is imperative that we evolve the spaces where we work. We are starting to do that. Millennials are very open to working in spaces that foster innovation and collaboration. We have some pilots in our global headquarters, and more examples in other buildings in Monterrey and Prague.”

German Alvarado Paredes, Global Organization and Compensation Director, CEMEX

“People won’t be able to compete with machines for knowledge, but what they can compete with machines on are the distinctly human attributes machines don’t have. How do you make instinctive judgments informed by data? How empathy is shown to relate to other people on an emotional, as well as rational, level and to build trust. How do you draw knowledge from multiple sources to see new perspectives and creative opportunities? How do you deliver bad news in a way that enables recovery and rebound?”

David Anderson, President, International, Mercer

Imperative #4/ Forge public-private partnerships for all to succeed.

No one group can (or should) be responsible for addressing the systemic issues of a city. To accelerate progress and to create the environment workers and their families need to thrive in, companies and governments must combine their resources, databases/analytics, technologies and know-how. In many growing cities, companies are tackling the challenge and finding new ways to address workers’ needs and ensure their safety and well-being.

These cities have a window of opportunity to future-proof themselves with the kind of work and the kind of workers to make them competitive by better facilitating collaboration and managing resources to bridge the gaps — or leapfrog the larger tier-one cities. Competition among cities gives businesses opportunities to negotiate — from tax incentives to office space — as well as the potential to translate those savings into attractive benefits for their people.

If they don’t, they risk falling behind and everyone, including businesses, will suffer. To accelerate progress at scale and to create the environments workers and their families can thrive in, companies and governments must join forces.

“We worked with heads of state to identify the strategic infrastructure priorities in Africa. The infrastructure is not being developed in tandem with the level of growth. You need to ensure there’s consistent delivery of infrastructure to facilitate trade and investment. There, we are very much looking at public partnership routes. Huge investment shortfalls required working with the private sector and wider civil society to understand what the design of those projects needed to look like so that you would actually get investments.”

Alice Charles, Project Lead, Cities, World Economic Forum

“The very big cities — where jobs grew fastest, where economic opportunities were seen as being the greatest — became overwhelmed by some of the growth. You then have diseconomies of scale and get into issues of congestion, with service provision no longer being at the level it should be, compromising quality of life, costs spiraling and housing costs being a major factor — making it, then, increasingly attractive for second-, third- and fourth-tier cities.”

Philipp Rode, Executive Director of LSE Cities and Associate Professorial Research Fellow, London School of Economics



An abstract graphic featuring a central splash of colors including black, orange, yellow, green, and pink, set against a teal background. The splash is composed of various shapes, including circles, lines, and irregular blotches, creating a dynamic and artistic effect.

05

Methodology

The research was conducted via an online survey in every market except in Africa (Kenya, Nigeria, Morocco), where interviews were conducted face-to-face via tablet. Respondents were given the option of completing the interview in the language of their choice.

The worker study focused on employees age 18 and older working full time or part time in or around the cities. The number of employees and an even gender split were controlled by quotas. The survey length was 10–15 minutes.

The second survey, a business-to-business study of 577 employer participants from the seven targeted growth economies, focused on senior-level decision-makers in multinational organizations with 50 or more employees. Decision-makers were screened using a combination of job titles and specific decision-making functions.

The participating executives are responsible for making in-country location and facility decisions. Respondents include C-suite executives or staff who report to a C-suite executive who have a role in their company's decision-making process relating to local investment in offices, operations, facilities, staffing, R&D, marketing or business ventures. The number of decision-makers for each country was controlled by quotas. All the business decision-makers work in or around the 15 study cities, but no quota was set by city.

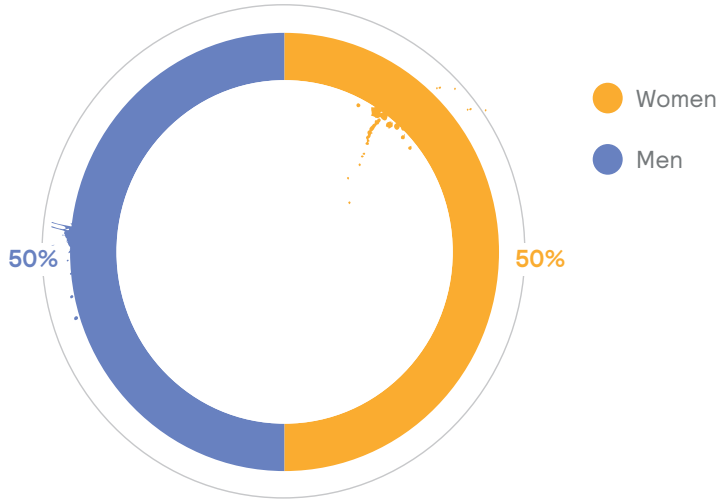
All interviews with workers and executives were anonymous, and the results were aggregated before being segmented. Both surveys asked similar questions to allow for comparisons across the study, but wording and options were customized for each audience.

Online interviews were conducted by Research Now/SSI, one of the world's largest online panel providers, in Brazil, China, India and Mexico. IFRAK Projects and Business Solutions, a South African market research data collection company, conducted face-to-face interviews in Nigeria, Kenya and Morocco.

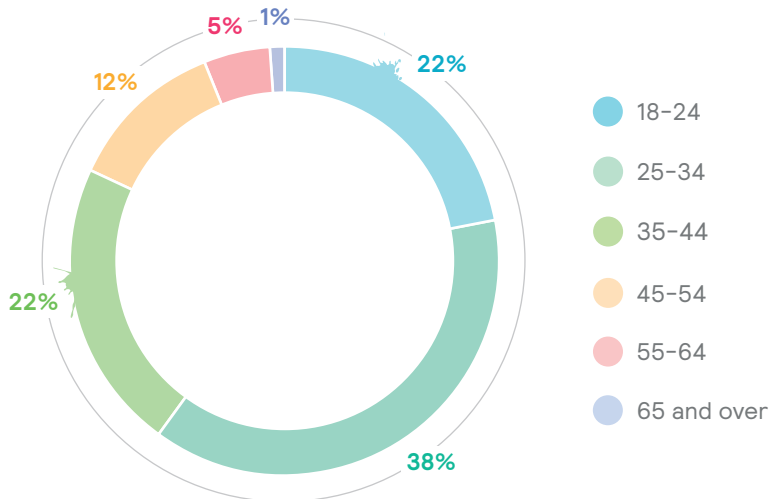


Worker Demographics

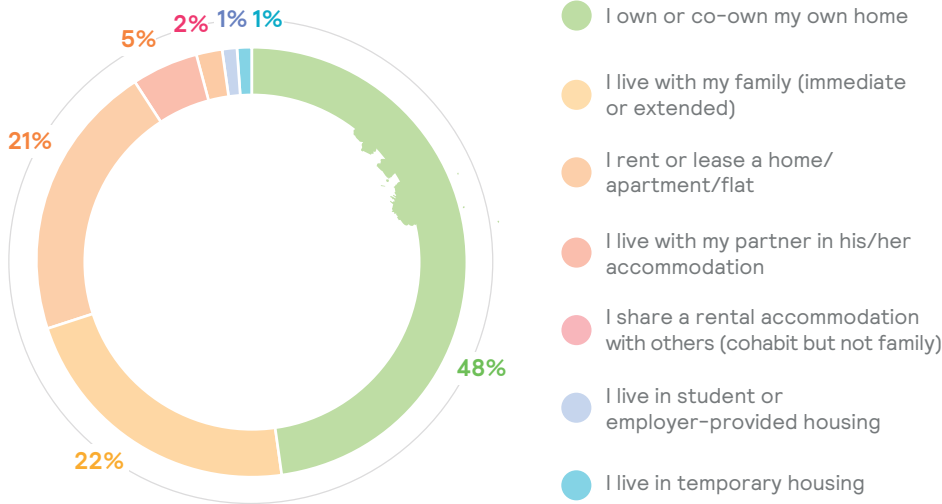
Gender



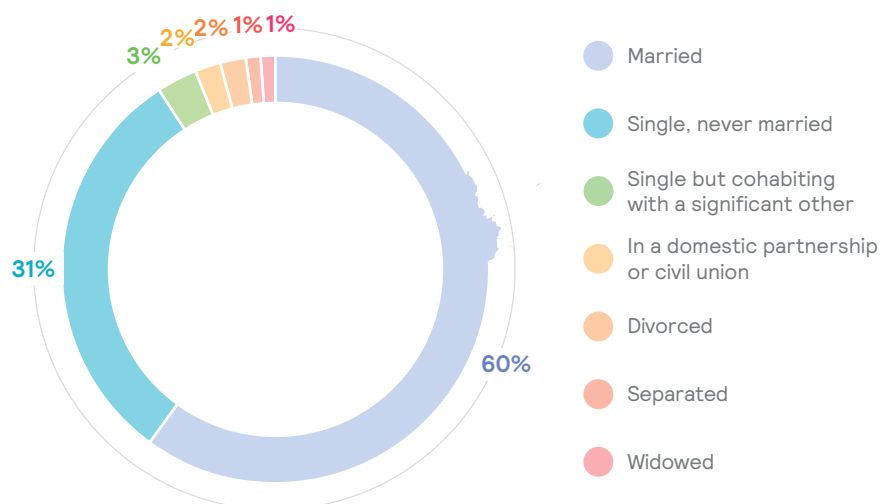
Age (Years)



Residence

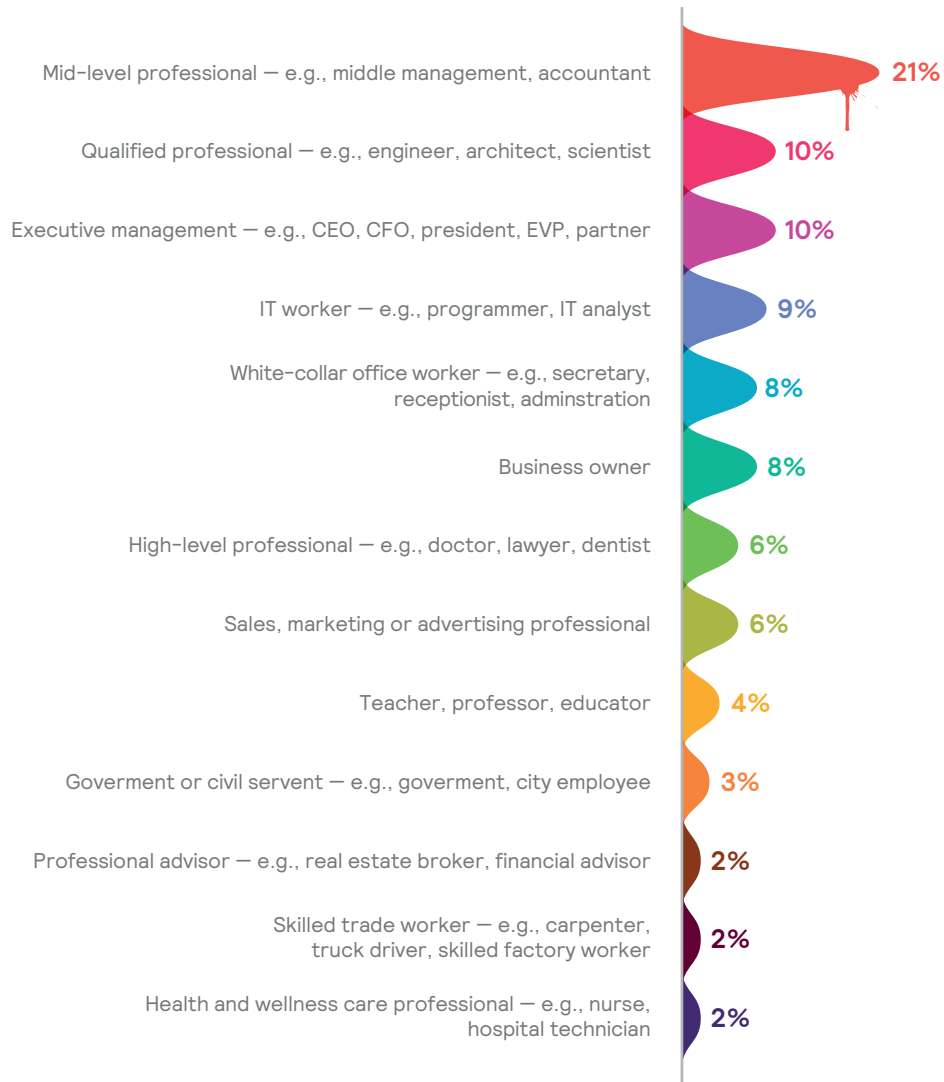


Marital Status



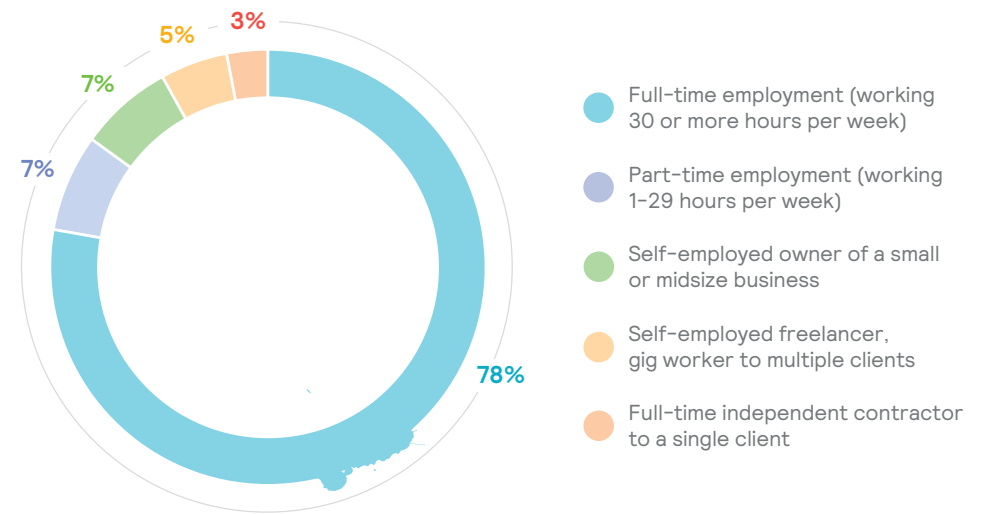
Occupation Level

What is your occupation? Please choose the option nearest to your current situation.



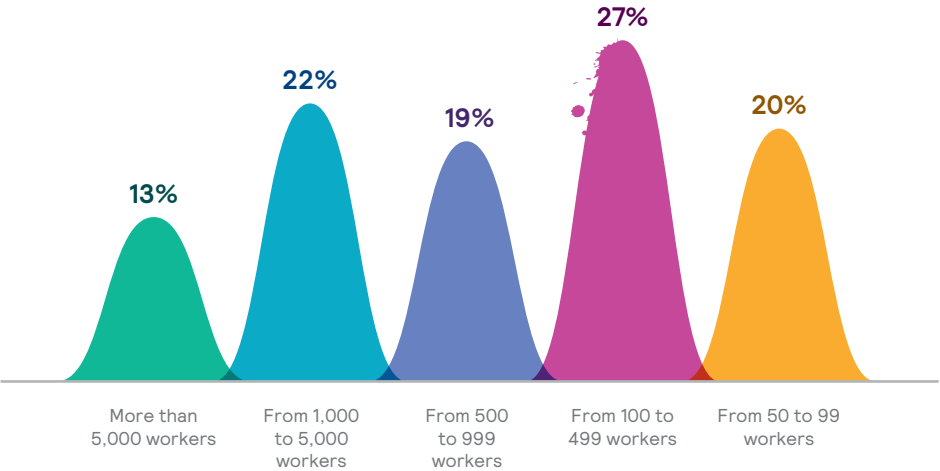
Employment Status

What best describes your current employment status?

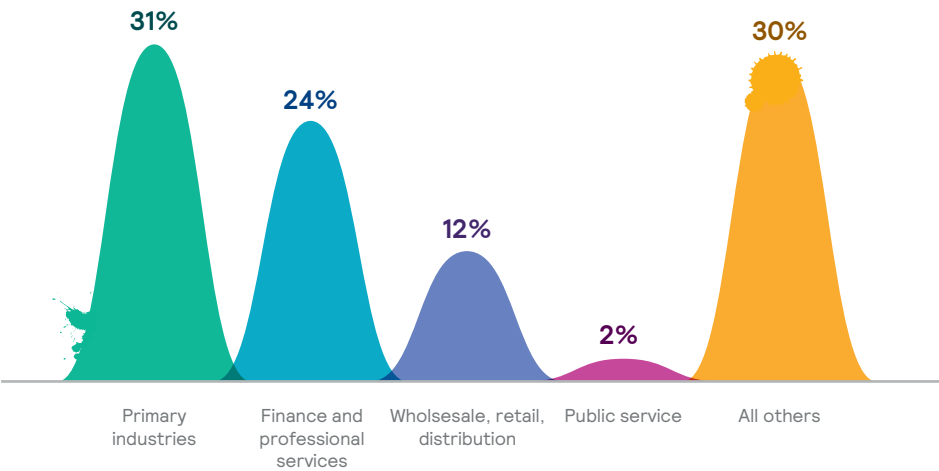


Employer Demographics

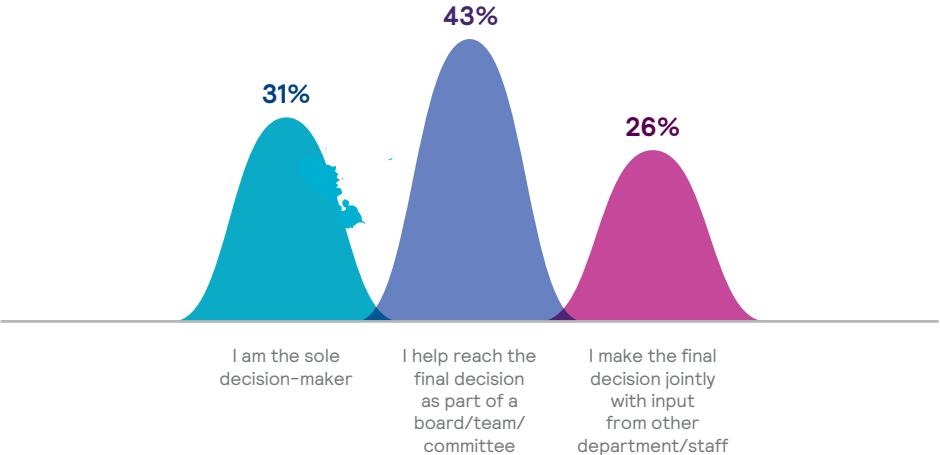
How many full-time employees does your company have globally?



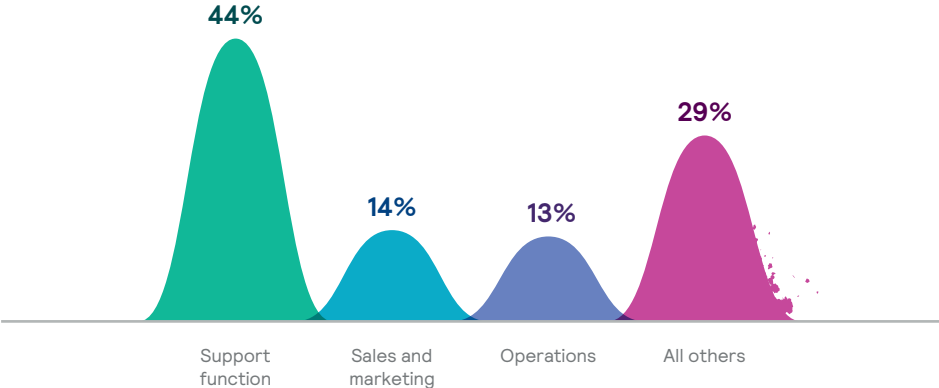
Which industry sector do you work in?



How would you best describe your role in your company's decision-making for in-market employment hires or for office site selection?



Which of the following business functions best describes your functional area of employment?







06

Appendix

Survey Responses per City: Workers + Employers

Worker Sample Sizes

Belo Horizonte, Brazil	500
Curitiba, Brazil	500
Chengdu, China	500
Hangzhou, China	500
Nanjing, China	500
Qingdao, China	200
Ahmedabad, India	500
Chennai, India	500
Hyderabad, India	500
Kolkata, India	500
Nairobi, Kenya	500
Guadalajara, Mexico	500
Monterrey, Mexico	500
Casablanca, Morocco	500
Lagos, Nigeria	500

All cities in China	1,700
All cities in India	2,000
All cities in Mexico	1,000
All cities in Morocco	500
All cities in Nigeria	500
All cities in Kenya	500
All cities in Brazil	1,000
All cities in Asia	3,700
All cities in Latin America	2,000
All cities in Africa	1,500
All cities in the study	7,200

Business Decision-Maker Sample Sizes

All cities in China	122
All cities in India	107
All cities in Mexico	110
All cities in Morocco	54
All cities in Nigeria	53
All cities in Kenya	56
All cities in Brazil	75
All cities in Asia	229
All cities in Latin America	185
All cities in Africa	163
All cities in the study	577



07

Contributors

Core Team

Pearly Siffel

Strategy and Geographic Expansion Leader, International

Jenny Chow

Project Manager

Our Partners

Occula Group is a strategic planning and insights, thought leadership and brand positioning consultancy. The global group creates bespoke teams to address clients' needs and integrates seamlessly to future-proof a client's business and brand. For this assignment, Occula Group partnered with Reputation Leaders, an international thought leadership and research firm.

Contributors

Amy Scissons

André Maxnuk

Anish Sarkar

Catherine Li

Daniela Andrade

David Anderson

Donovan Oliveiro

Eduardo Marchiori

Fiona Dunsire

Hope Frank

Jean Martin

Michel Faucher

Millie He

Peter Botha

Puneet Swani

Rashid Garbadawala

Robert Jefferson

Rocco Sta Maria

Rose Kwan

Slagin Parakatil

Tracy Teel

Graphic design concept by Katie Rea, Rich Hewitt, and Amram Perez. Editing by Jennifer Whitney.

The study is an international initiative that benefits from numerous contributors across the Mercer ecosystem. A heartfelt thanks to all who provided input and guidance. A special thanks to Mercer's clients for sharing their best practices and the 577 organizations who participated in the study. And of course, we could not have done it without the input of over 7,200 people who live and work in the cities of this study.



08

About Mercer

At Mercer, we make a difference in the lives of more than 115 million people every day by advancing their health, wealth and careers. We're in the business of creating more secure and rewarding futures for our clients and their employees — whether we're designing affordable health plans, assuring income for retirement or aligning workers with workforce needs. Using analysis and insights as catalysts for change, we anticipate and understand the individual impact of business decisions, now and in the future.

We see people's current and future needs through a lens of innovation, and our holistic view, specialized expertise and deep analytical rigor underpin each and every idea and solution we offer. For more than 70 years, we've turned our insights into actions, enabling people around the globe to live, work and retire well.

At Mercer, we say we Make Tomorrow, Today.

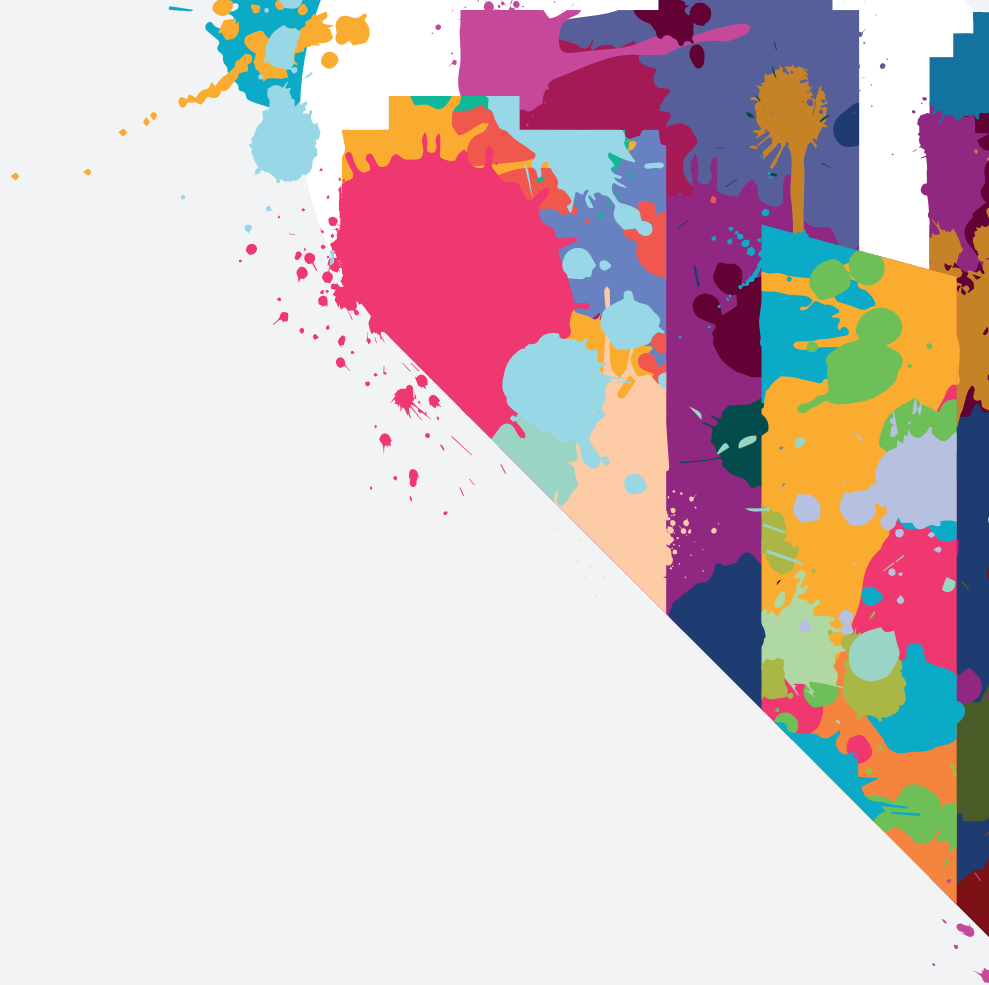
For further information, please visit:

www.mercer.com

Join the conversation:

Twitter: [@Mercer](https://twitter.com/Mercer)

LinkedIn: www.linkedin.com/company/mercer



© 2018 Mercer LLC. All rights reserved.

6009240c-MG