WINNING CITIES OF TOMORROW

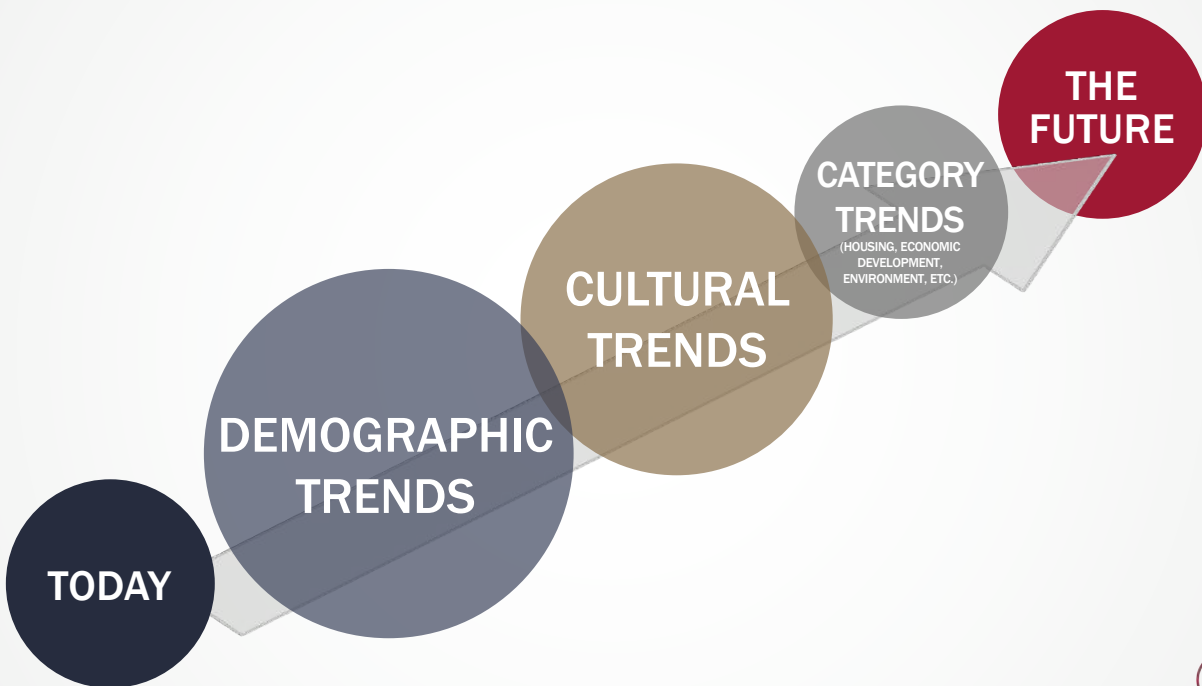JOHN W. MARTIN

SIR INSTITUTE FOR TOMORROW

TODAY'S AGENDA

1 Becoming a Futurist

2 Winning Cities of Tomorrow

3 Today's Imperatives
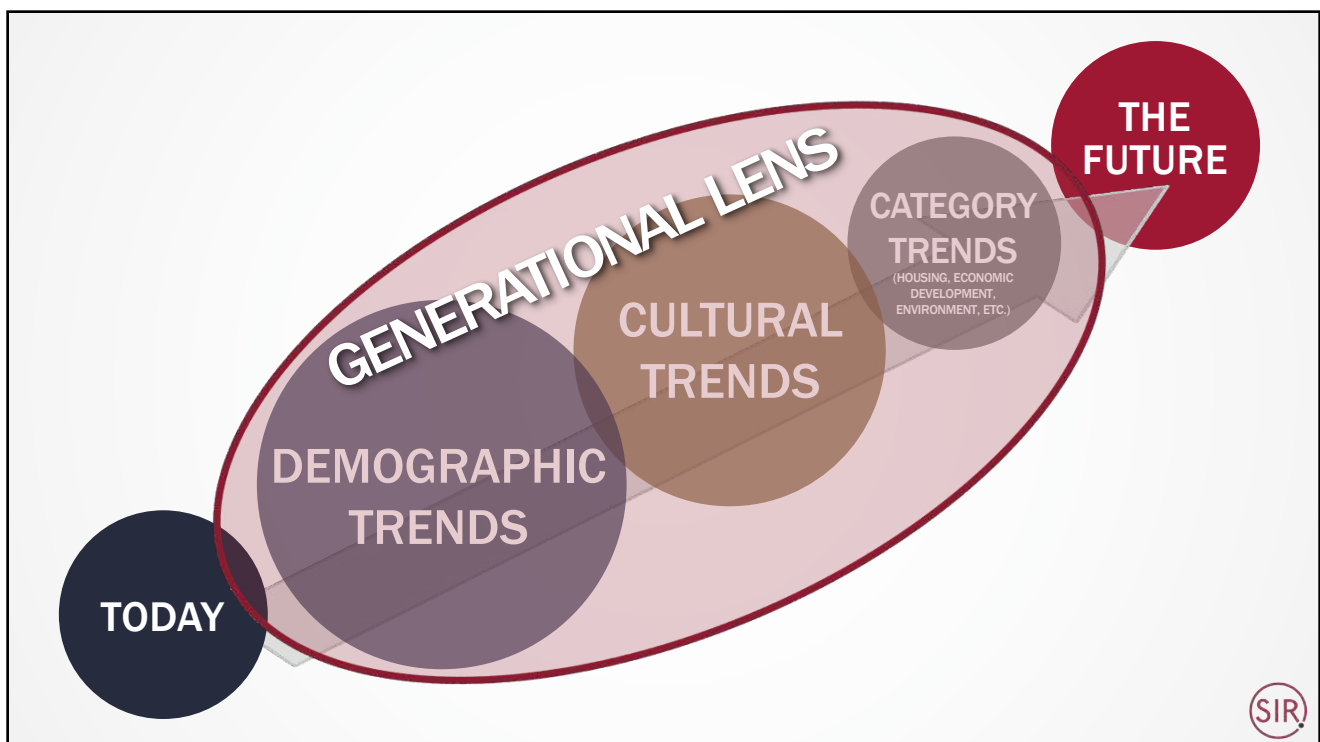
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TODAY'S AGENDA

1 **Becoming a Futurist**

2 **Winning Cities of Tomorrow**

3 **Today's Imperatives**

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THE FUTURE

CATEGORY TRENDS
(HOUSING, ECONOMIC DEVELOPMENT, ENVIRONMENT, ETC.)

CULTURAL TRENDS

DEMOGRAPHIC TRENDS

TODAY

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THE **CHANGE** AGENTS

GENERATIONAL LENS

THE FUTURE

CATEGORY TRENDS
(HOUSING, ECONOMIC DEVELOPMENT, ENVIRONMENT, ETC.)

CULTURAL TRENDS

DEMOGRAPHIC TRENDS

TODAY

SIR

SILENT GENERATION
1929-45
72 to 88 years old

BOOMERS
1946-64
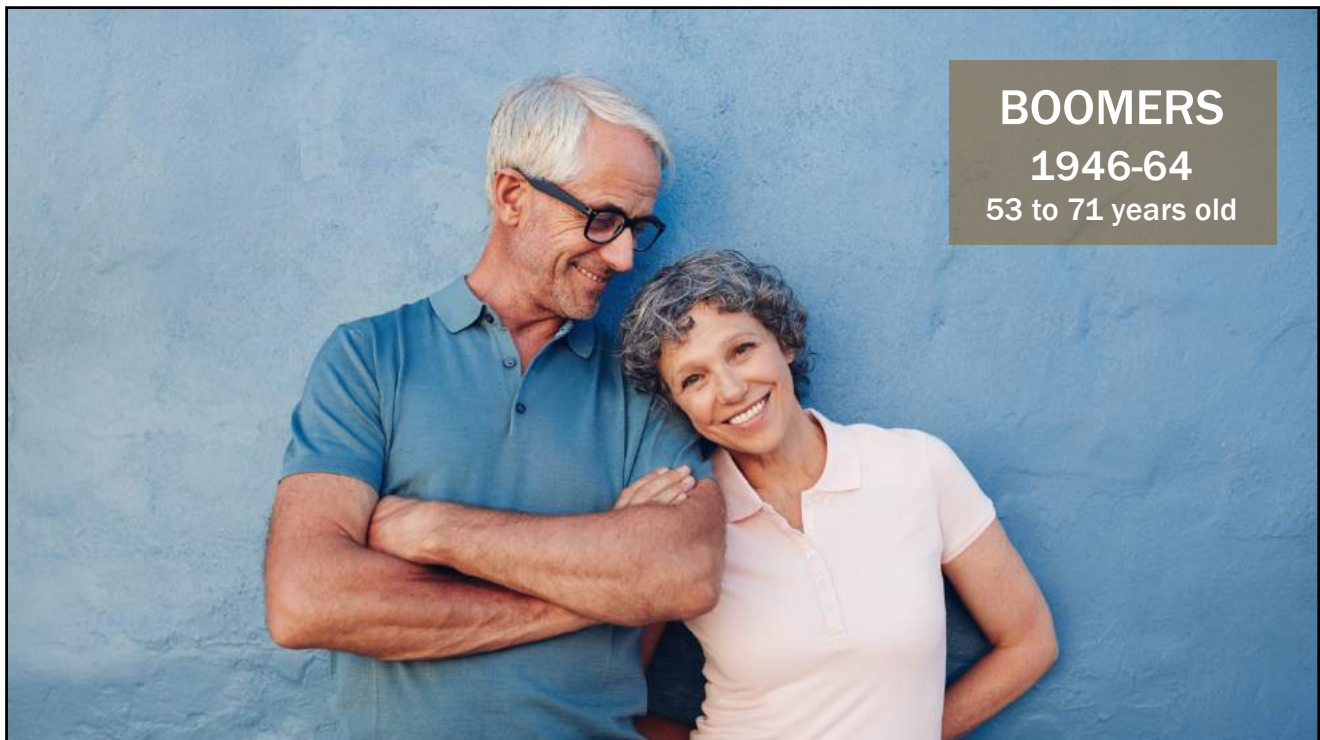53 to 71 years old

GEN X
1965-82
34-52

MILLENNIALS
1983-2001
16-34

INSTITUTE FOR TOMORROW
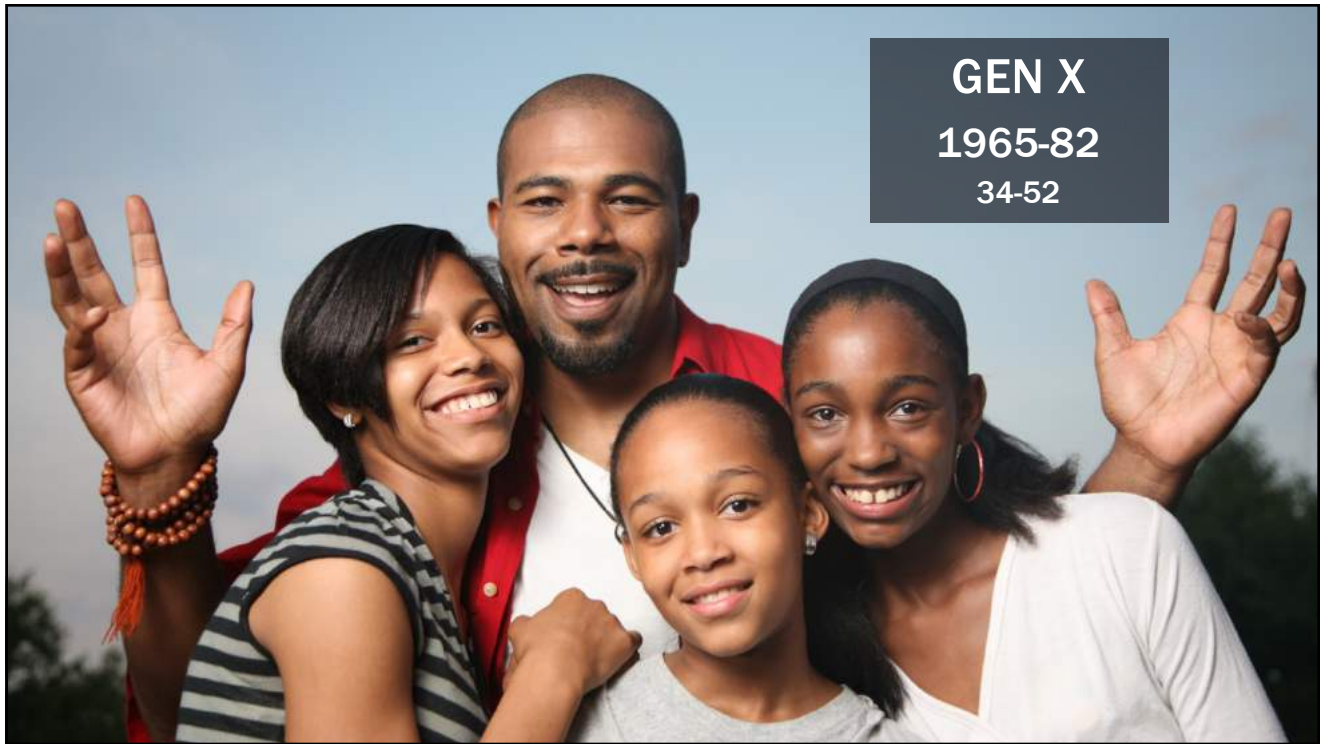
Americans come in all shapes and sizes, races and religions, education levels and income brackets. Each of those attributes has an influence on how people view the world. But the most profound indicators are generational.

Generational Mindsets:

	BOOMERS	GEN X	MILLENNIALS	GENERATION "Z"
Outlook	Optimistic	Skeptical	Confident	Protective
Work Ethic	Driven	Free Agent	Goals	Self-taught
View of Money	Spenders	Debtors	Savers	Frugal
View of Leadership	Pay your dues	Competence	Egalitarian	Pluralistic
Work/Life Balance	Work is Life	Work to Live	Integrated	TBD
Medium	TV	Computer	Mobile	VR?
Orientation	Self-centered	Self-reliant	Collective Self	Self-aware

Members of the same generation, by definition, have shared many of the same formative experiences that set them apart from other generations. Did they live through times of war, or times of peace? Did they come of age in an era of prosperity and rising expectations, or a period of economic turmoil and broken dreams? Were their families large or small? Were the heads of most households a mom and dad, or did most have some combination?

Did the dominant media in a generation's childhood consist of network television, Cable TV, or YouTube and Facebook? Did their cultural icons include the Rolling Stones, grunge, hip hop, or Grace Vanderwaal?

While coming-of-age experiences make each generation distinct, so does a generation's stage in its life cycle. Since the dawn of time, every generation has traveled the same path of youth, young adult, midlife and old age. Each stage is associated with predictable priorities. Youths are concerned about establishing themselves in the world. At midlife, they reach the peak of their earning power and status. Old age brings less interest in material items.

The interaction of generational and lifecycle influences is complex — and the story for a given generation won't be fully written until the last member leaves. This primer gives you a starting point for better understanding Boomers, Gen Xers, Millennials and the next generation on the horizon, the yet unnamed Generation "Z."

MILLENNIALS
will shape
CULTURE & SOCIETY
starting now...

IT'S BECOMING THEIR WORLD NOW...

TODAY:

84,000,000   74,000,000   74,000,000

MILLENNIALS
Median age:
25

GEN X
Median age:
44

BOOMERS
Median age:
62

16 ←→ 34   35 ←→ 52   53 ←→ 71

10   20   30   40   50   60   70   80

21 ←——————————————→ 65

US Census

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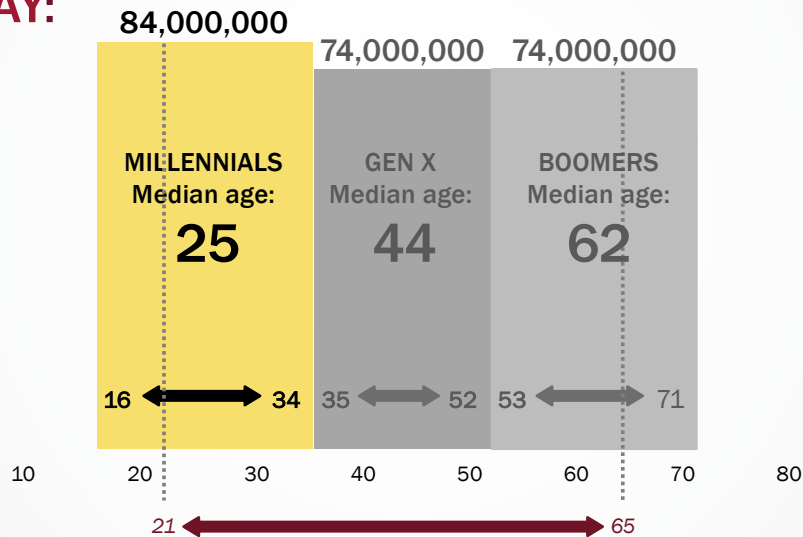
THEY WILL DOMINATE IN 2025...

2025:

87,000,000   69,000,000   70,000,000

MILLENNIALS
Median age:
33

GEN X
Median age:
52

BOOMERS
Median age:
70

24 ←→ 42   43 ←→ 60   61 ←→ 79

10   20   30   40   50   60   70   80

21 ←——————————————→ 65

US Census

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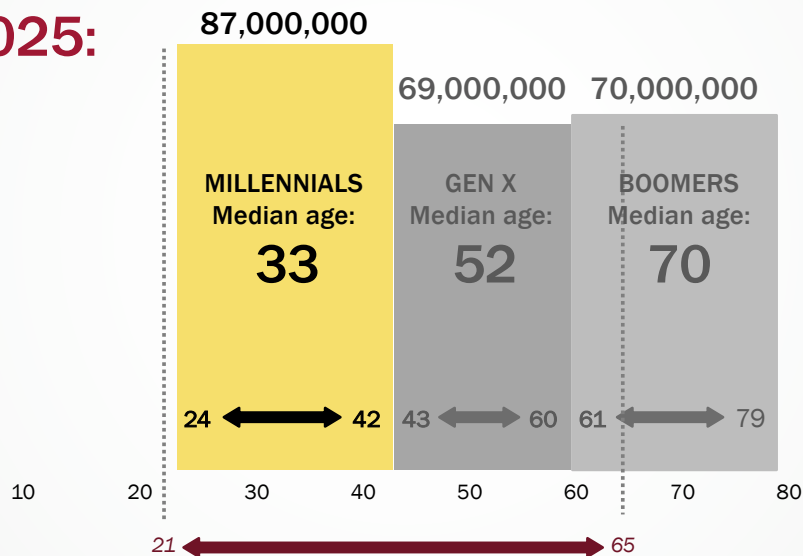
THE CHANGING WORKPLACE

TODAY:

Silent <2%

Millennials **32%**

Boomers **32%**

Gen X **33%**

2025:

Boomers **15%**

Gen Z **9%**

Gen X **30%**
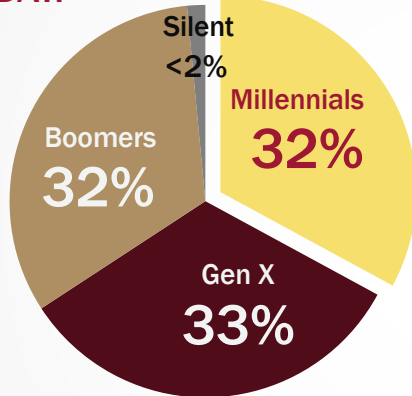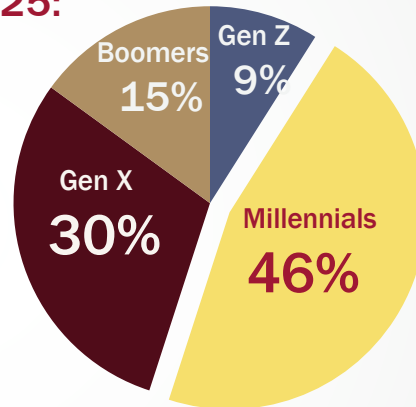
Millennials **46%**

Workforce Ages 20-74. Source: Bureau of Labor Statistics , WSJ. http://on.wsj.com/1tv0n1O

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WHY
IS EACH GENERATION UNIQUE?

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Culture's impact

Who We Are

Defining Events

Generational Values

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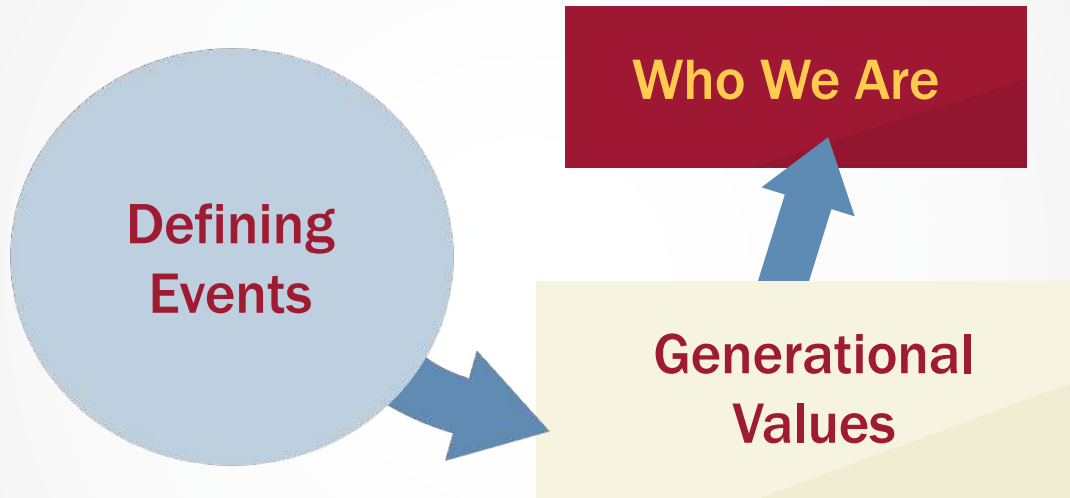
GENERATION and FORMATIVE "WONDER YEARS":

SILENT	BOOMER	GEN X	MILLENNIAL	GEN "Z"
Late 1920s to mid '40s	Late '50s to mid '70s	Late '70s to mid '90s	Late '90s to mid 2010s	Now to mid '30s

SIR
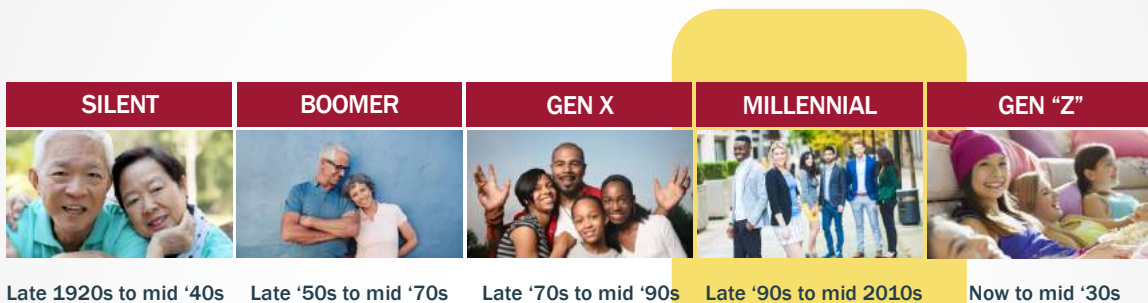
INFLUENCES THAT DEFINE MILLENNIALS

9/11   CLINTON/BUSH   RECESSION   WARS   PARENTING

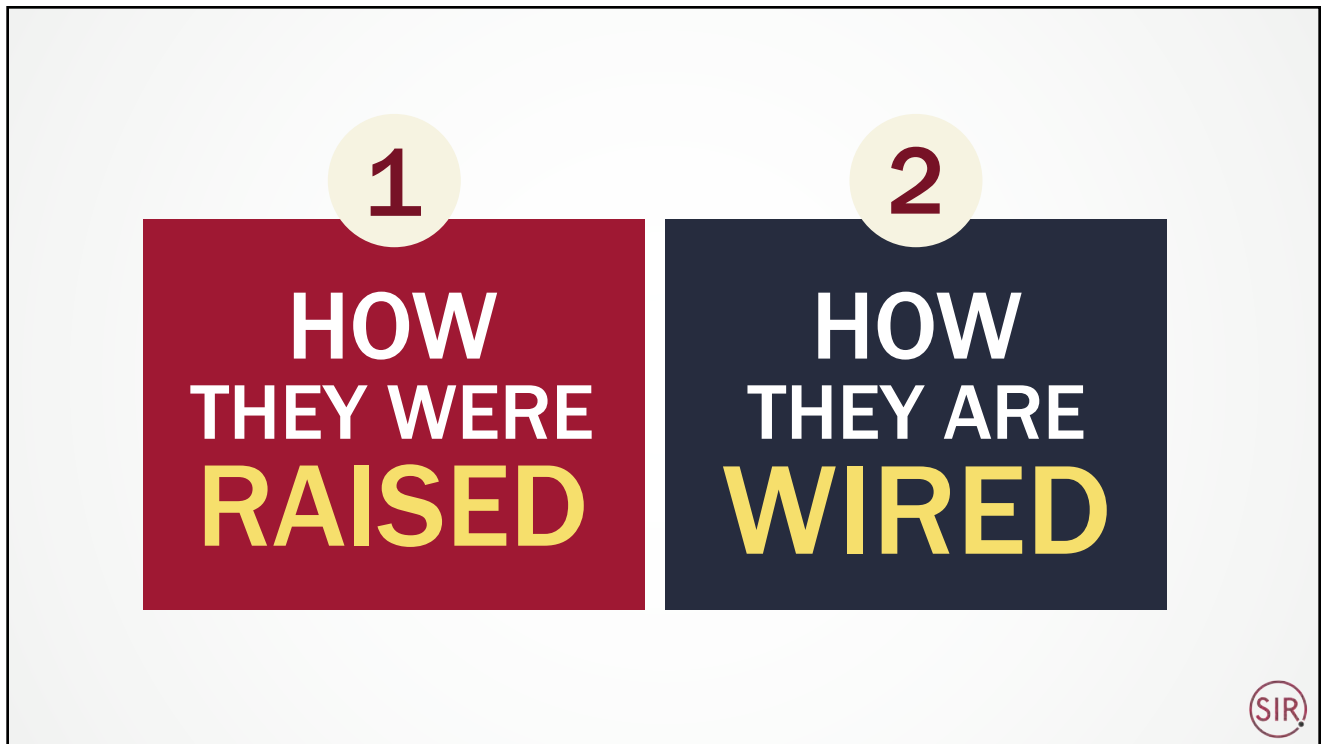COLUMBINE   TECH++   SOCIAL MEDIA   DIVERSITY

MILLENNIALS:

GENERATIONAL VALUES:

Confidence plus
Civic duty
Achievement
Hyper connected
Multi-tasking
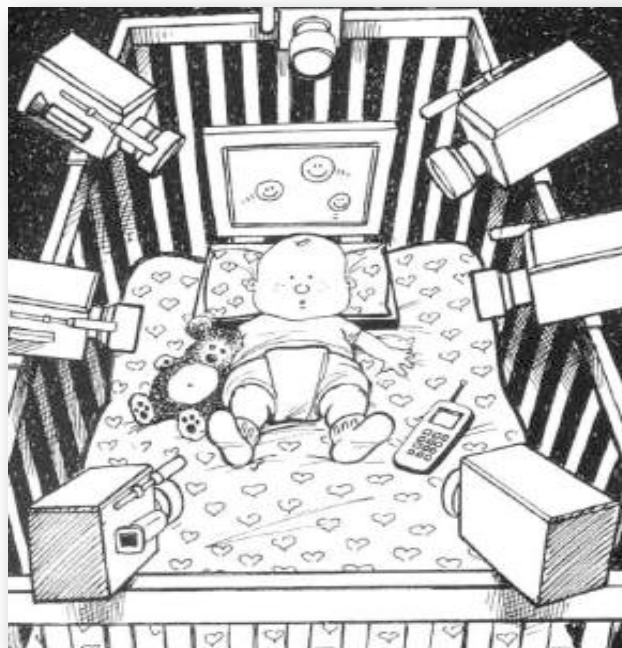Fearless

ARCHTYPE:

Co-dependent
Purposeful
Ambitious

1 **HOW THEY WERE RAISED**

2 **HOW THEY ARE WIRED**

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1 **HOW THEY WERE RAISED**

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67% of Millennials
were born to Boomers
who are determined to
"do parenting right."

Precious
little DNA

"You're Special"

And a strong bond with **MOM & DAD**

WHO WAS YOUR NUMBER ONE INFLUENCE IN:

Choosing a college:	MOM & DAD
Choosing a major in college:	MOM & DAD
Making a decision to take current job:	MOM & DAD
Making decisions:	MOM & DAD

Source: SIR study among high school and college students in Florida, 2012

THEY ALL THINK THEY'RE ALL "STARS"

The constant praise Millennials got while growing up resulted in a generation where almost everyone thinks they are a "star"

MILLENNIALS:

GENERATIONAL VALUES:

Confidence plus

Civic duty

Achievement

Hyper connected

Multi-tasking
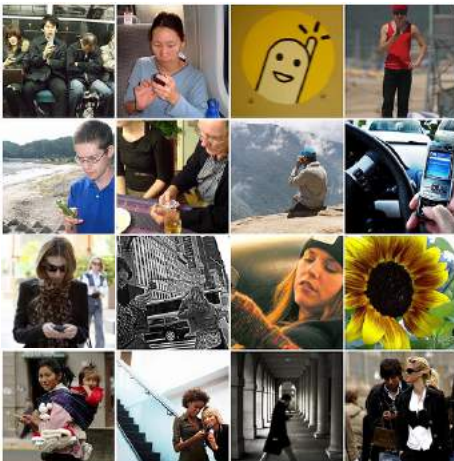
Fearless

ARCHTYPE:

Co-dependent

Purposeful

Ambitious

2

HOW THEY ARE WIRED

They are DIGITAL NATIVES and are "WIRED" together

LIVING the experience VS. SHARING the experience

The **COLLECTIVE SELF** Dominates

The wisdom of **MANY** is better than the thoughts of **FEW**

facebook. yelp

WIKIPEDIA
The Free Encyclopedia

amazon.com

They trust anony-mous posts, reviews, recommendations. The crowd RULES.

A MILLENNIAL PARADOX?
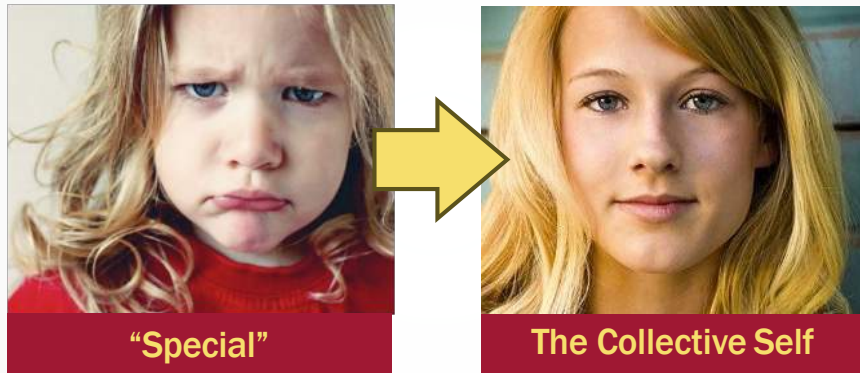
"Special"

The Collective Self

SIR

EVERYONE IS SPECIAL, EVERYONE HAS VALUE

Millennial Mindsets:

"I'M SPECIAL" is not comparative as in "I'M BETTER THAN YOU." It's an absolute statement:

"Yes, I'm special, but so are you. And you. And you..."

That means EVERYONE HAS VALUE, and NO ONE IS BEST.

MILLENNIALS SENSE OF "SELF" IS THE COLLECTIVE, IT'S "WE," NOT "ME"

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MILLENNIALS:

GENERATIONAL VALUES:

Confidence plus

Civic duty

Achievement
Hyper connected
Multi-tasking
Fearless

ARCHTYPE:

**Co-dependent
Purposeful**

Ambitious

SIR.

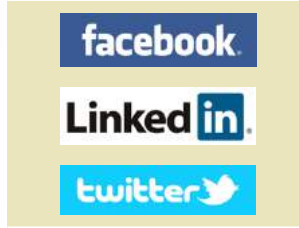**MILLENNIAL ORIENTATION:
COLLECTIVE SELF**

MILLENNIALS ARE ALREADY CHANGING THE CULTURE

HYPER-COMMUNITY

88% say they want to live in an urban area

HYPER-CONNECTED

To each other, and any on the planet with a device

HYPER-COLLABORATIVE

Wisdom of the crowd tops the thoughts of the few

HYPER-SHARING

Why own when you can pay based on usage?

Q&A?

TODAY'S AGENDA

1 Becoming a Futurist

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3 Today's Imperatives

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10

DEFINING TRAITS
OF WINNING CITIES
OF TOMORROW

1

SHARED
STORY

INSIGHT

Winning cities of tomorrow will create and seamlessly curate **THEIR STORIES** – what makes them unique.

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Shared Story

Has 2 Parts:
1. Unified Imagery
2. Unified Message

Brand Architecture Strategy

Most communities present themselves as a house of brands

Brand Architecture Strategy

It's best to communicate as a BRANDED HOUSE

Columbus, Ohio

Columbus Ohio's United Logomark

Columbus City Government
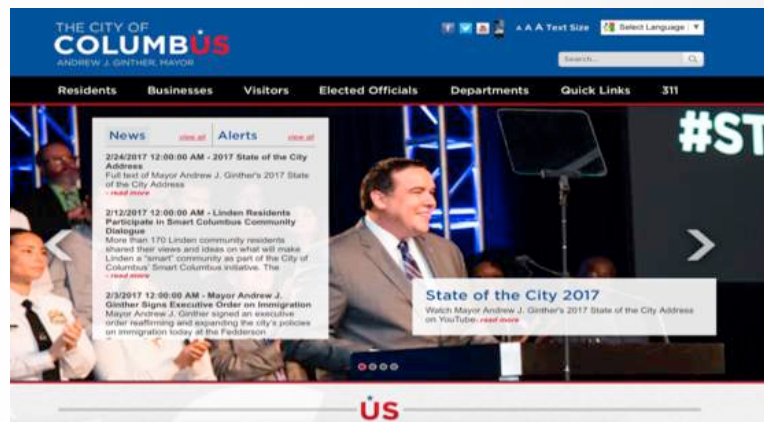
**City Municipal Initiatives
(This One Is Technology)**

City Dept. Logos
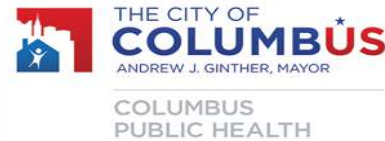
Columbus Chamber
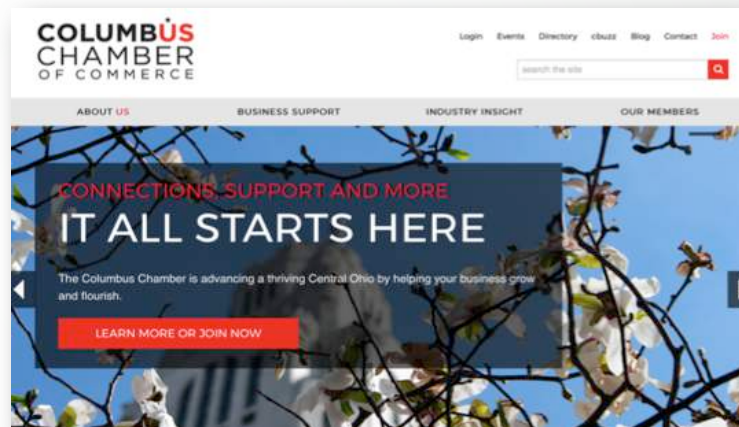
Columbus Tourism
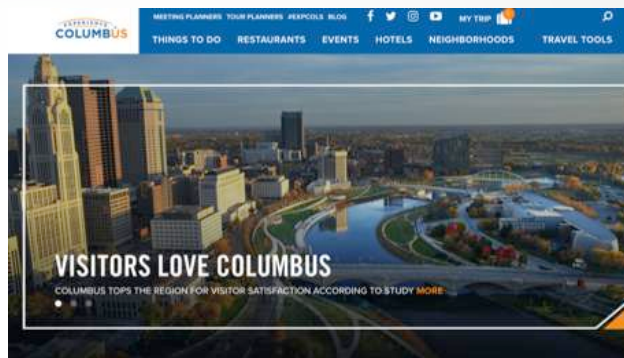
Columbus Regional Econ. Development
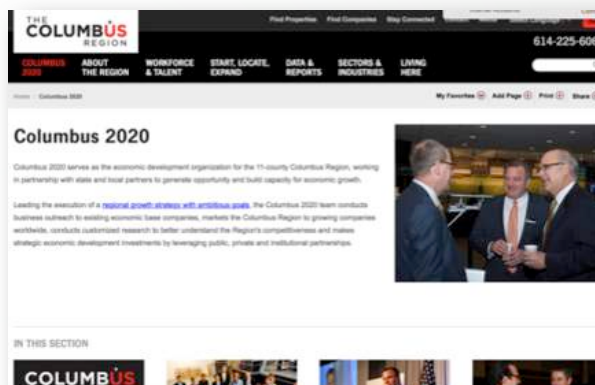
Brand Columbus Website

How to use the logomark
with your organization

www.brandcolumbus.com

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Shared Story
Has 2 Parts:
1.   Unified Imagery
2.   Unified Message

An example of how to help shape a shared narrative:

NORFOLK'S STORY
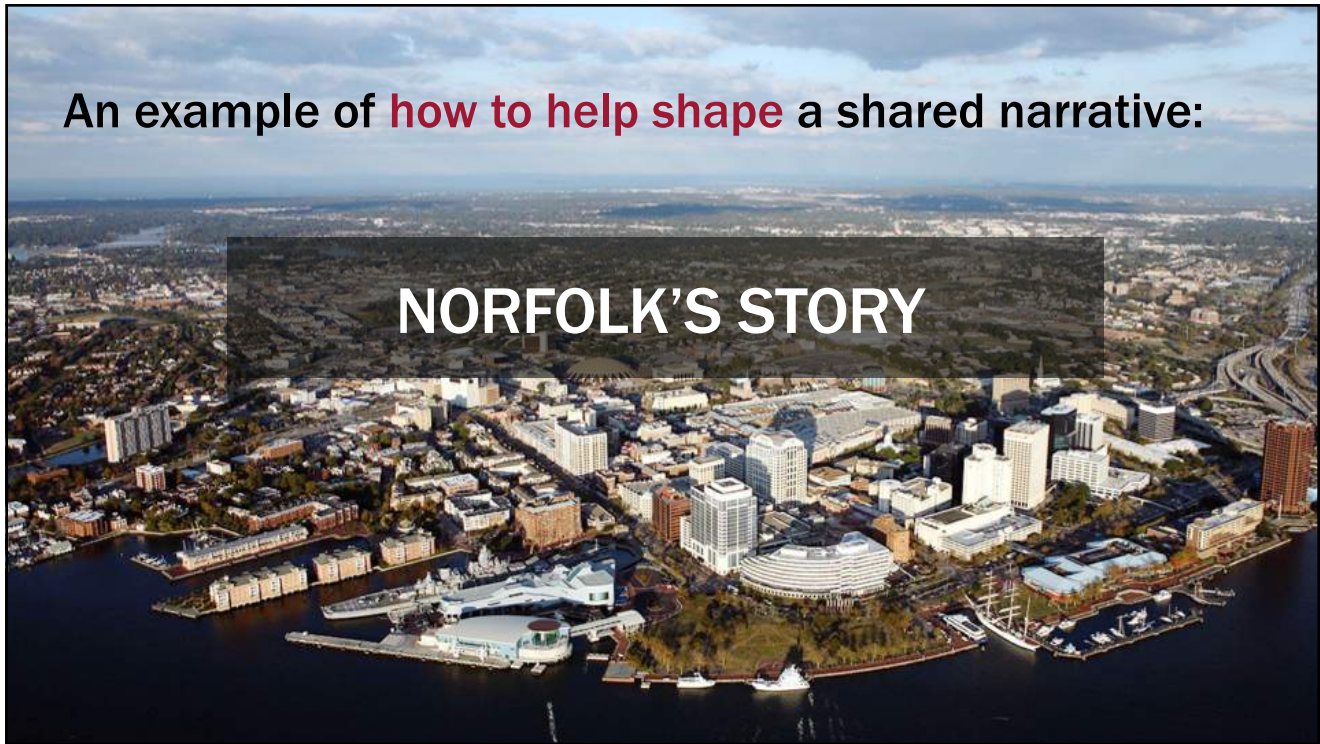
A "Crown Image" Is The Charlotte Region's Iconic Symbol

Charlotte's Opportunity?

INSIGHT

Winning cities of tomorrow will be intentional in harnessing the bond **CITY ADVOCATES** have with their city.

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HYPER Community

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Millennials are natural ambassadors

Half Full?

Half Empty?

HYPER Connectors

facebook.

Linked in.

twitter

Word of mouth buzz is one of the oldest and most effective forms of marketing.

The biggest challenge for city brands is **how to foster word of mouth on a wide scale.**

Nashville
has the highest
NPS score among
Millennials

City	NPS
Nashville, TN	**46%**
Austin, TX	42%
Denver, CO	28%
Richmond, VA	21%
Arlington, VA	18%
Charlotte, NC	14%
Raleigh, NC	13%
Atlanta, GA	1%
Washington, DC	-2%

Q7. How likely is it that you would recommend Nashville as a place to live to a friend or family member?

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Formal program teaching people
how to share "The Best of Nashville"

3

LIVABLE PLACES

INSIGHT

Winning cities of tomorrow will offer a wide variety of 15-MIN LIVABLE COMMUNITIES (neighborhoods).

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Villages or "activity centers"

Regional Density and 2035 Growth Pattern

Regional Development Centers
1. CBD   8. Airport
2. VCU   9. Ruffin Mill
3. Glenside   10. Chesterfield Gov't Center
4. Innsbrook/Short Pump   11. Swift Creek
5. Ashland   12. Midlothian
6. Atlee   13. CJW
7. Mechanicsville   14. West Creek

Legend
- Rural
- Suburban
- Urban
- Future Growth
- ★ Locally designated development areas
- • Local development centers
- Regional Development Centers
- Jurisdictional Boundaries
- Transportation Analysis Zones (TAZ)

0   5   10   20 Miles

In RVA, there
are 14 such
"ACTIVITY CENTERS"
growing and
prospering

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Top desires for "ideal" neighborhood

Percent saying "4" or "5"

Having access to stores, restaurants, and services close to my home (**within about 15 minutes**)

RECENT MOVERS	79%
FUTURE MOVERS	81%

I would love to live **within 15 minutes** commute of my work or my school

RECENT MOVERS	73%
FUTURE MOVERS	64%

Recent Movers
n = 300
Future Movers
n = 300

Q: How much do you agree with each of the following statements, when thinking about your ideal neighborhood? Please use a scale of 1 to 5, where "1" means "completely disagree" and "5" means "completely agree."

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Walkable community trends

*2015 is the first year a preference for **walkable communities** overtook a preference for **conventional** communities.*

Community A:
Houses with large yards, and you have to drive to the places you need to go

Community B:
Houses with small yards, and it is easy to walk to the places you need to go

Such a big shift in about 10 years is remarkable.

70%
61%
45%

30%
37%
48%

Community A   Community B
■ 2004 ■ 2011 ■ 2015
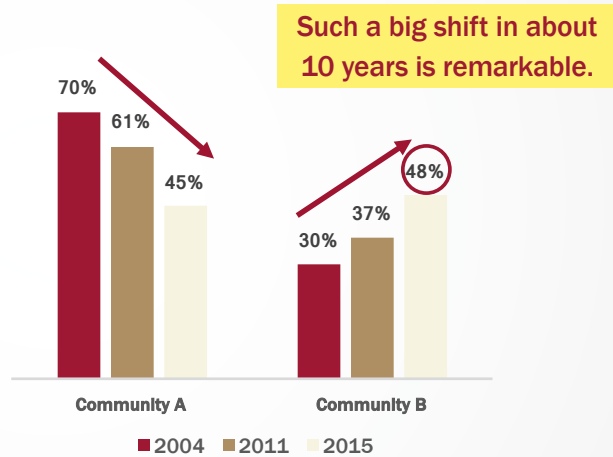
Source: National Association of Realtors National Community and Transportation Preference Survey (2004, 2011, 2015)

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Millennials Are Less Car-centric

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% of U.S Population with Driver's License

16

50%

31%

1978   Today

17

75%

49%

1978   Today

18

86%

68%

1978   Today

Source: USDOT

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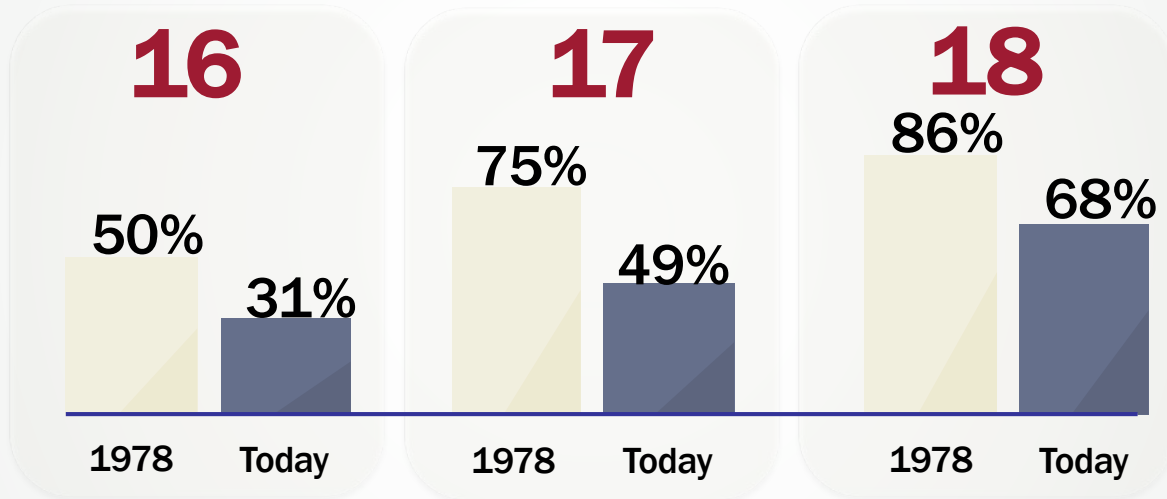
*"For me this choice has almost nothing to do with being anti-car. Instead, it's **about all the other things a 'non-car life' represents** - it helps me be more environmentally conscious, socially aware, and local."*

Millennial

66%

Place high-quality transportation in their top three concerns when evaluating a new place to live

Source: Rockefeller Foundation

75%

Believe they will live in a place that does not require a car

Source: Rockefeller Foundation

79

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A New Hub:
A Shared Place

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Micro-Apt.

Car Lite Life

15-Minute
Livable Community

4
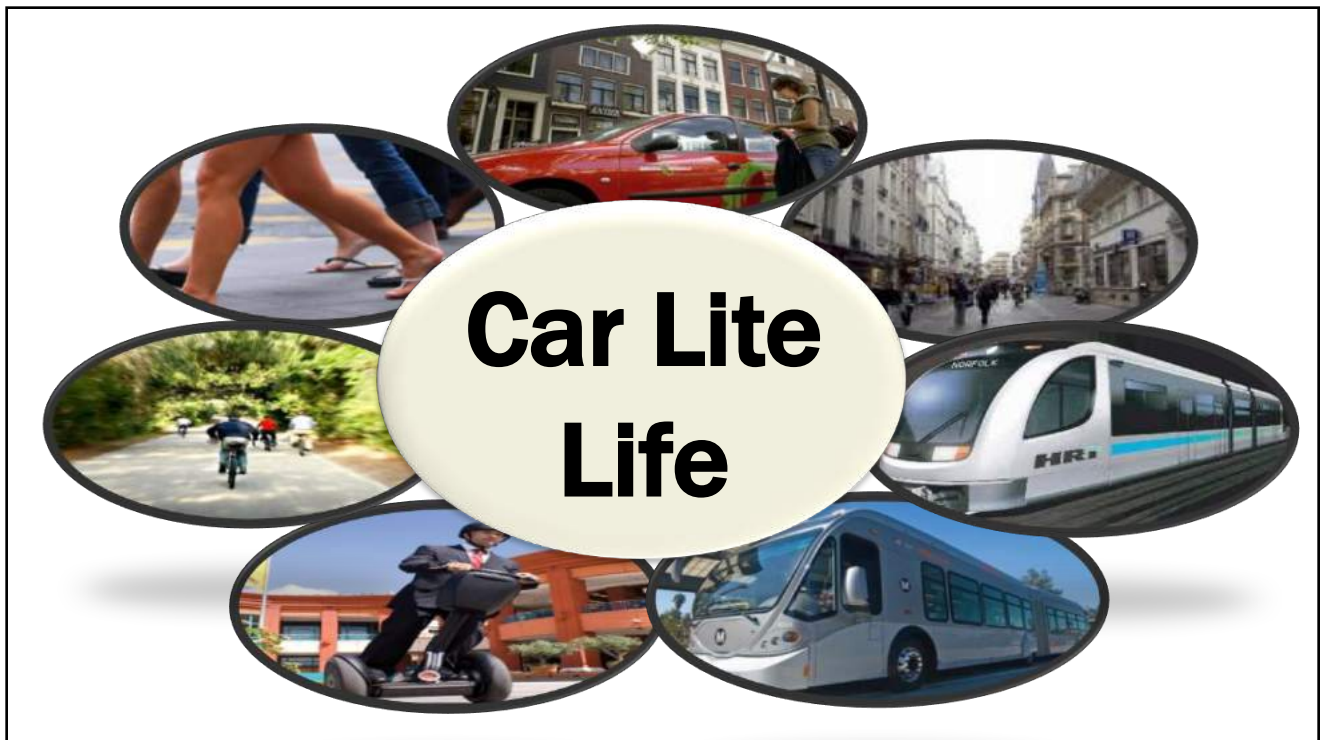
AFFORDABLE
SPACES

INSIGHT

Winning cities of tomorrow
will offer a greater mix of
AFFORDABLE SPACES.

U.S. Poverty Rate and People

Number of people:
46M

Number in millions

Poverty rate in percent

Rate 12% to
15%

50

40

30

20

10

1970   1980   1990   2000   2010

Source: U.S. Census Bureau.
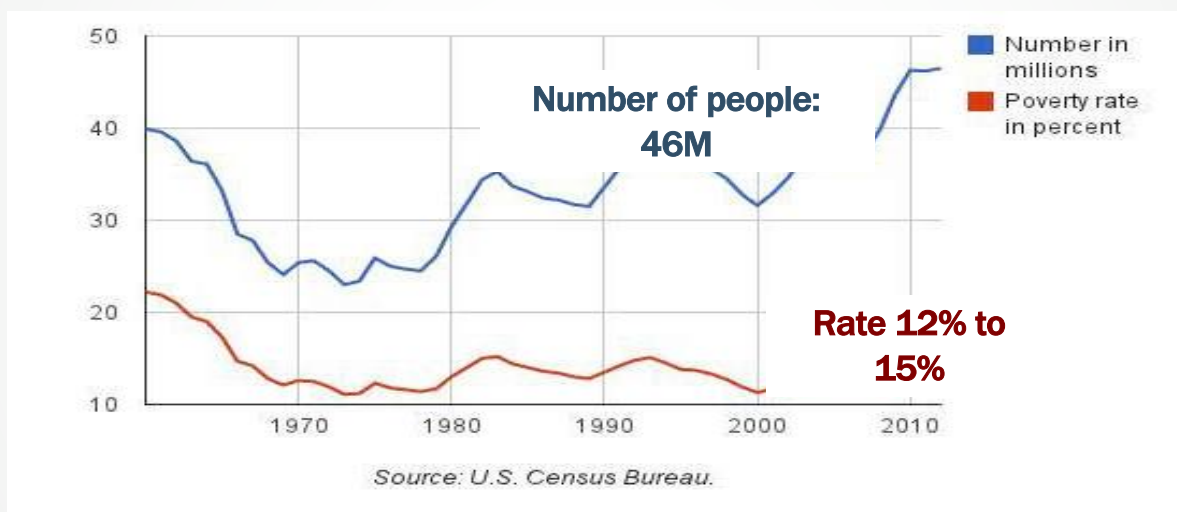
Housing & Transportation

50%

2010 Percent of Average
HH Annual Expenditures

Source: Bureau of Labor Statistics

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Combined Cost Burdens for Moderate-Income Households vs. Other Income Brackets (25 Largest Metro Areas)

	Moderate-Income Households	Median-Income Households	Above-Median-Income Households
Average Income	$44,566	$63,540	$107,834
Annual Housing Costs (H)	$14,170	$17,226	$21,373
Annual Transportation Costs (T)	$11,912	$13,070	$14,487
Combined H + T Expenses	$26,083*	$30,296	$35,860

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MILLENNIALS
1983-2001
16-34
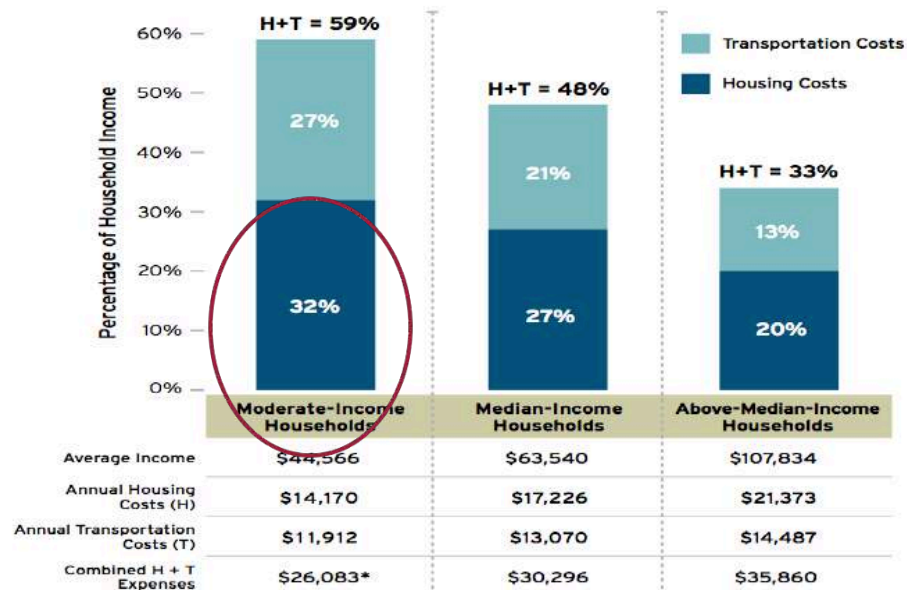
$31,100

Average college debt

68% who graduated from public and nonprofit colleges in 2015 had **student loan debt**

Source: Institute for College Access & Success

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TODAY:

1 in 2

Millennials are "Under-employed"

Source: Accenture
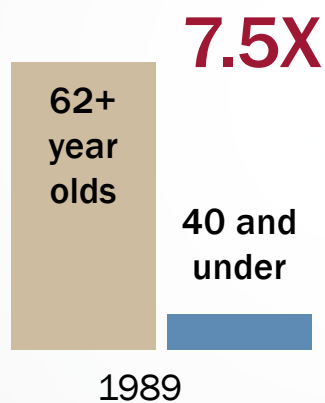
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The "Wealth Gap"

7.5X

62+ year olds

40 and under

1989

Source: Federal Reserve Bank

SIR.

The "Wealth Gap"

14.8X

7.5X

62+ year olds

40 and under

62+ year olds

40 and under

1989

Today

Source: Federal Reserve Bank

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5
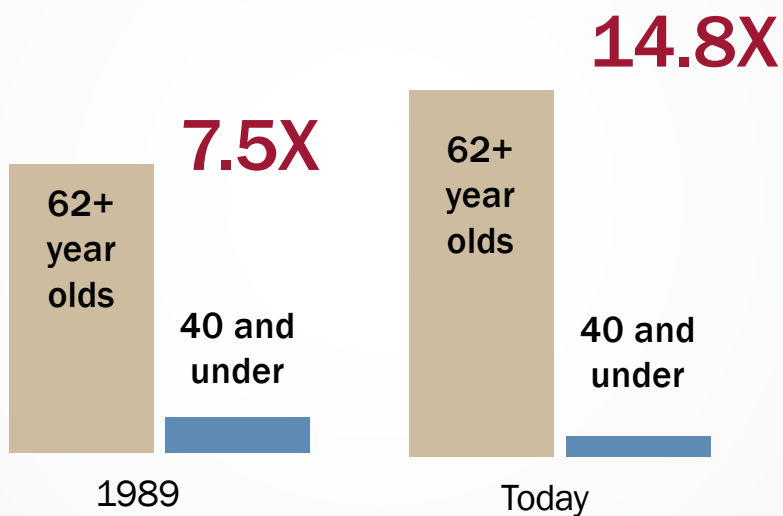
WORKFORCE
FLEXIBILITY

INSIGHT

Winning cities of tomorrow will effectively manage shifting workforce dynamics.

47%

of all jobs eliminated within next 20 years

Source: Oxford University

6
MILLENNIAL MAGNET

INSIGHT

Winning cities of tomorrow will be known as **HOT SPOTS**, especially among young people.

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FEWER   MORE

In the U.S.
the population
over age 65 will
grow from
46 million
today to
74 million
by 2030

U.S. Population 65+

2000	2010	2020	2030	2040
11%	13%	16%	19%	20%

Source: US Census

FLORIDA

20%

of population is 65+
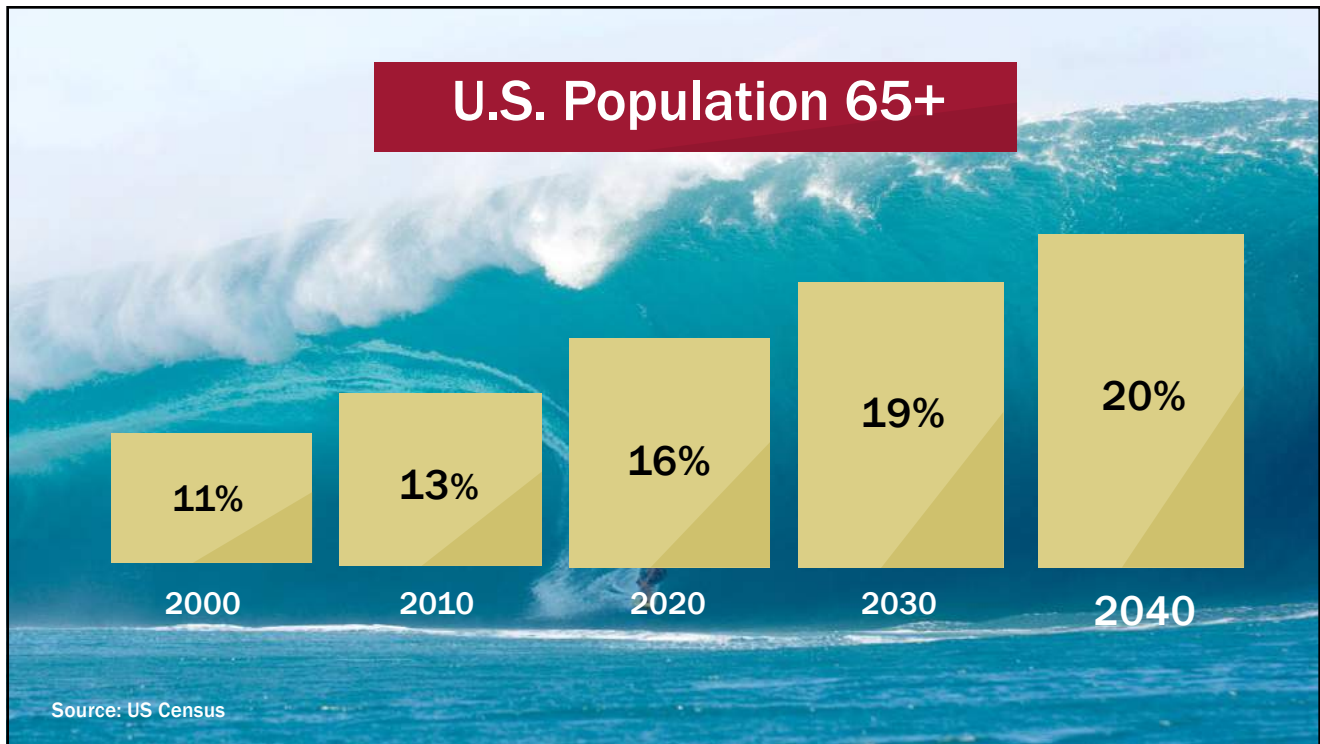
The Population Age Pyramid

Old Age

Midlife

Young Adult

Youth

1960

MALES   FEMALES

85+
80-84
75-79
70-74
65-69
60-64
55-59
50-54
45-49
40-44
35-39
30-34
25-29
20-24
15-19
10-14
5-9
0-4

6%   4%   2%   0%   2%   4%   6%

Baby Boomers (born 1946-1964)

Source: U.S. Census Bureau

Old Age

Midlife

Young Adult

Youth

The battle will be for YOUNGER WORKERS

COMPETITION FOR YOUNGER WORKERS WILL INTENSIFY
Labor Participation Rates (in millions)

% Change:

	2014	2024	% Change
	155,922	163,770	+5.0%
55+	33,860	40,575	+19.8%
25-54	100,767	104,697	+3.9%
	122,062	123,195	
16-24	21,295	18,498	-13.1%

Source: SIR Analysis of Bureau of Labor Statistics Dec 2015 Labor Force Projections

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Companies Are Now Preparing For This Future

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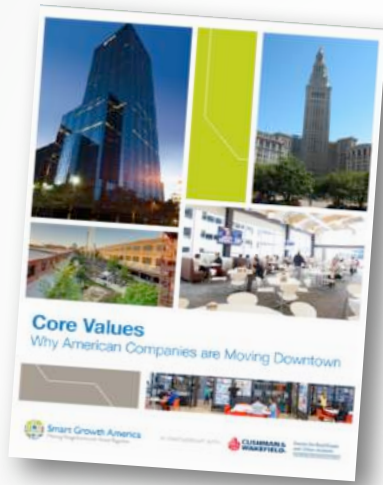
500 recent corporate moves:

"Talent recruitment and retention"

Source: Smart Growth America

Cities Are Now Preparing For This Future

Placemaking Shift

The Old Economic Development Model

Old Model

Recruit Big Companies

People Follow Companies

Community Grows

The New Economic Development Model

Old Model

Recruit Big Companies

People Follow Companies

Community Grows

New Model

Recruit for
Targeted Industries

Build Sense of
Place and Community

People Will Flock to It

Businesses Will Grow
From Within and
Others Will Come

What Do Millennials Want In A Place?

When you think about a city as a place you'd really want to live, how important are each of the following to you?

Attribute	4	5 - Very Important	Total
Has a variety of employment options	28%	64%	92%
Quality and affordable housing	28%	64%	91%
Is safe	28%	62%	90%
Offers a great food scene	14%	54%	88%
Offers outdoor recreation options	35%	43%	78%
Has access to water	36%	39%	75%
Embraces innovation	38%	36%	74%
Embraces creativity	33%	39%	72%
Embraces small business	35%	37%	72%
Higher education options	37%	34%	71%
Is diverse	32%	29%	61%
Urban living environment	33%	27%	60%
Offers an active music scene	31%	29%	60%
Has rich history	35%	23%	58%
Offers an active arts scene	27%	28%	55%
Is bikeable/walkable	27%	28%	55%
Has easy public transportation	25%	24%	49%
Is near the mountains	23%	13%	36%

Percentages represent top two box ratings of "4" and "5."

n = 1,413

■ 4
■ 5 - Very Important

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Safety, variety of employment, quality and affordability of housing top the list

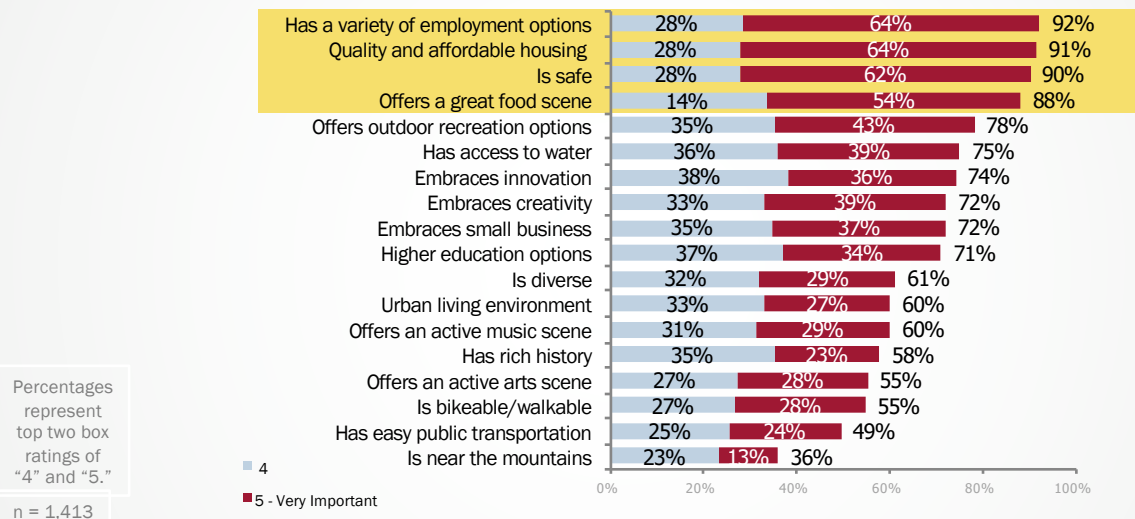Q20. When you think about a city as a place you'd really want to live, how important are each of the following to you?

BASICS	RALEIGH NC	WASH. DC	CHARLOTTE NC	AUSTIN TX	ATLANTA GA	Denver CO
Is safe	89%	87%	86%	91%	81%	90%
Has a variety of employment options	90%	82%	83%	85%	82%	87%
Quality and affordability of housing options	92%	83%	87%	87%	83%	83%
Offers outdoor recreation options	71%	60%	71%	77%	71%	76%
Offers a great food scene	76%	75%	78%	85%	77%	75%
Embraces creativity	59%	55%	58%	69%	59%	64%
Embraces innovation	70%	58%	61%	69%	60%	64%
Is near the mountains	28%	24%	40%	17%	30%	64%
Has access to water	59%	54%	64%	65%	54%	63%
Is bike-able/walkable	46%	50%	41%	43%	44%	61%
Has easy public transportation	42%	66%	40%	47%	46%	60%
Embraces small business/start-ups/entrepreneurship	54%	48%	60%	61%	54%	57%
Higher education options	76%	60%	60%	73%	62%	57%
Is diverse	60%	63%	55%	69%	55%	55%
Urban living environment	47%	59%	51%	60%	46%	53%
Offers an active music scene	51%	36%	46%	53%	49%	49%
Offers an active arts scene	42%	38%	44%	43%	42%	46%
Has rich history	42%	47%	39%	41%	42%	42%

Raleigh, NC
n = 198
Washington, DC
n = 199
Charlotte, NC
n = 200
Austin, TX
n = 194
Atlanta, GA
n = 204
Denver, CO
n = 195

SIR.

Placemaking Attributes

	RALEIGH NC	WASH. DC	CHARLOTTE NC	AUSTIN TX	ATLANTA GA	Denver CO
Is safe	89%	87%	86%	91%	81%	90%
Has a variety of employment options	90%	82%	83%	85%	82%	87%
Quality and affordability of housing options	92%	83%	87%	87%	83%	83%
Offers outdoor recreation options	71%	60%	71%	77%	71%	76%
Offers a great food scene	76%	75%	78%	85%	77%	75%
Embraces creativity	59%	55%	58%	69%	59%	64%
Embraces innovation	70%	58%	61%	69%	60%	64%
Is near the mountains	28%	24%	40%	17%	30%	64%
Has access to water	59%	54%	64%	65%	54%	63%
Is bike-able/walkable	46%	50%	41%	43%	44%	61%
Has easy public transportation	42%	66%	40%	47%	46%	60%
Embraces small business/start-ups/entrepreneurship	54%	48%	60%	61%	54%	57%
Higher education options	76%	60%	60%	73%	62%	57%
Is diverse	60%	63%	55%	69%	55%	55%
Urban living environment	47%	59%	51%	60%	46%	53%
Offers an active music scene	51%	36%	46%	53%	49%	49%
Offers an active arts scene	42%	38%	44%	43%	42%	46%
Has rich history	42%	47%	39%	41%	42%	42%

PLACEMAKING

Raleigh, NC
n = 198

Washington, DC
n = 199

Charlotte, NC
n = 200

Austin, TX
n = 194

Atlanta, GA
n = 204

Denver, CO
n = 195

Q20. When you think about a city as a place you'd really want to live, how important are each of the following to you?
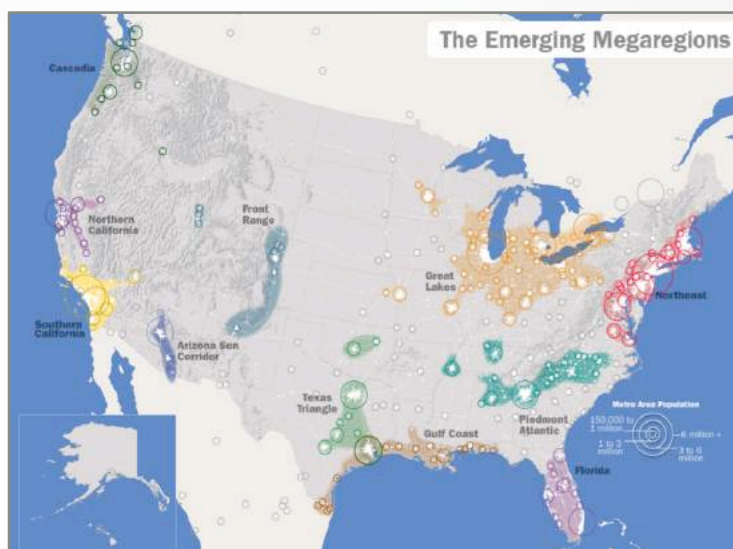
SIR.

7

BEYOND
BORDERS

INSIGHT

Winning cities of tomorrow will embrace and practice **REGIONALISM**.

SIR

Mega Regions

The Emerging Megaregions

GREATER MSP (Minneapolis Saint Paul Regional Economic Development Partnership) is a private, non-profit (501c3) organization dedicated to providing public and private sector leadership, coordination and engagement **to grow the economy of the 16-county MSP region**.

Texas Triangle

Dallas-Fort Worth(DFW), Houston, San Antonio, and Austin

Balt.-Richmond

INSIGHT

Winning cities of tomorrow will be known for **CREATIVITY AND INNOVATION**.

SIR.

Placemaking Attributes

	RALEIGH NC	WASH. DC	CHARLOTTE NC	AUSTIN TX	ATLANTA GA	Denver CO
Is safe	89%	87%	86%	91%	81%	90%
Has a variety of employment options	90%	82%	83%	85%	82%	87%
Quality <u>and</u> affordability of housing options	92%	83%	87%	87%	83%	83%
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Urban living environment	47%	59%	51%	60%	46%	53%
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Offers an active arts scene	42%	38%	44%	43%	42%	46%
Has rich history	42%	47%	39%	41%	42%	42%

PLACEMAKING (bracket spanning from "Offers outdoor recreation options" through "Has rich history")

Raleigh, NC
n = 198

Washington, DC
n = 199

Charlotte, NC
n = 200

Austin, TX
n = 194

Atlanta, GA
n = 204

Denver, CO
n = 195

Q20. When you think about a city as a place you'd really want to live, how important are each of the following to you?

SIR.

51%

Millennials want to start a business or plan to do so

Source: SIR

SIR.

SOCIAL ENTREPRENEUR

SIR.

"I knew since I was a kid I wanted to work in a start-up like environment. It's really about wanting to solve a problem. I have always enjoyed creating stuff."

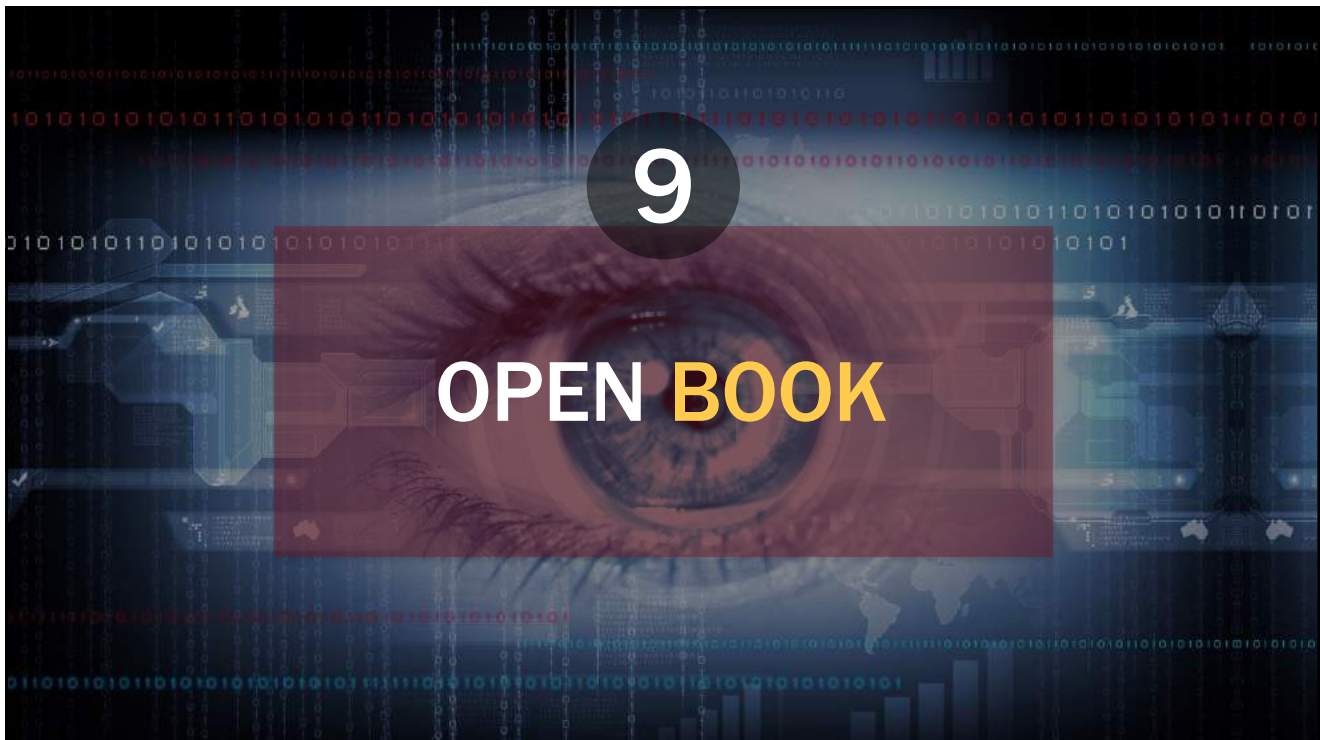## OPEN TO CREATIVE CULTURE

SIR

47% have tattoos

Source: 2015 Harris Survey For TotalBeauty.com

OPEN TO WHAT'S NEXT

9

OPEN BOOK

INSIGHT

Winning cities of tomorrow will build trust by being HYPER-TRANSPARENT AND GREAT COMMUNICATORS.

SIR.

Less than half of residents feel informed:

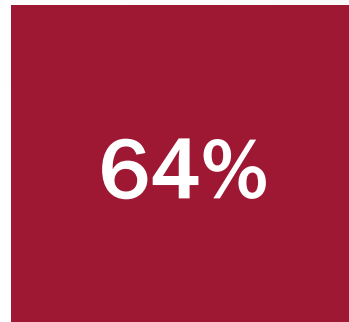|	
53%	**47%**
Uninformed (1-3)	Informed (4-5)

Q5. How would you rate the overall quality of life in _____ ?

SIR.

Informed respondents are significantly more satisfied with the QUALITY OF LIFE offered

40%

64%

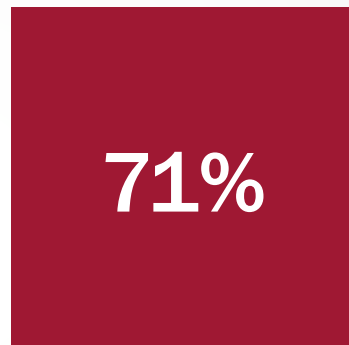Uninformed (1-3)

Informed (4-5)

Q5. How would you rate the overall quality of life in _____ ?

SIR.

Informed respondents give significantly higher ratings of SATISFACTION with living in _____

50%

71%

Uninformed (1-3)

Informed (4-5)

Q6. Overall, how satisfied are you with living in _____ ?

SIR.

Informed respondents give significantly higher ratings for the **VALUE OF SERVICES** for the taxes paid in _____

17%

Uninformed (1-3)

41%

Informed (4-5)

Q10. How would you rate the overall value of services for the taxes paid to _____ ?

SIR.

10

BIG
TENT

INSIGHT

Winning cities of tomorrow will be **PLURALISTIC COMMUNITIES** where everyone feels they **BELONG**.

SIR.

2020

The Minority Will Become the Majority of Children

(18 & Under)

Source: U.S. Census
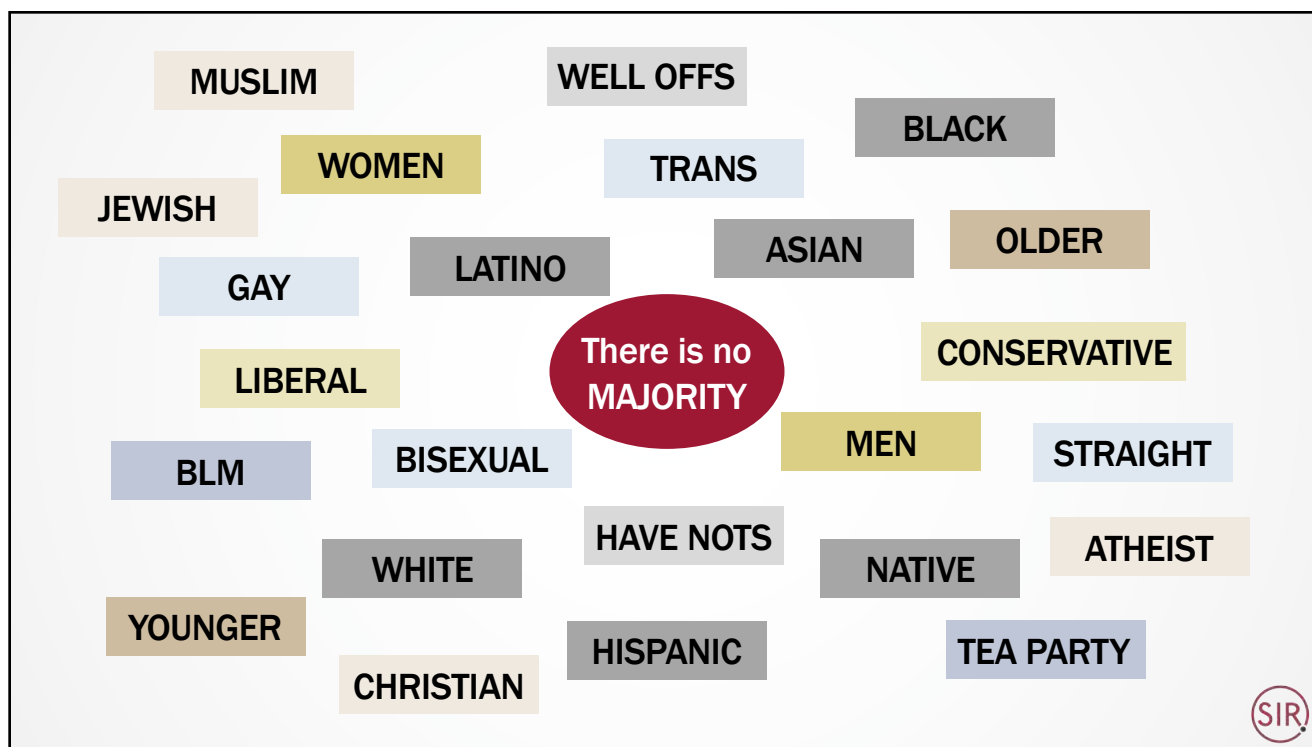
Hint:
visit your local
elementary school

SIR.

2045

The Minority Will Become
the Majority

THE FUTURE OF AMERICA IS PLURALISTIC

There is no MAJORITY

MUSLIM

WELL OFFS

BLACK

WOMEN

TRANS

JEWISH

GAY

LATINO

ASIAN

OLDER

There is no
MAJORITY

CONSERVATIVE

LIBERAL

BLM

BISEXUAL

MEN

STRAIGHT

HAVE NOTS

WHITE

NATIVE

ATHEIST

YOUNGER

HISPANIC

TEA PARTY

CHRISTIAN

SIR.

WE ARE LESS MELTING POT AND MORE BENTO BOX

SIR.

## BUT THERE ARE TOO MANY CATEGORIES TO BLEND

BINARY Choices are now MULTIPLE Choice

- Men/Women now is Gender Fluidity
- Old/Young now is 4 or more generations
- People now self-identify their race(s)
- Sexual orientation is fluid
- Even "movements" come in an increasing array of choices

SIR.

COMMON BOND: EVERYONE IS SEEKING A PLACE TO BELONG

Decisions on where to live are driven by both
RATIONAL and **EMOTIONAL** Factors

RATIONAL   EMOTIONAL

SIR.
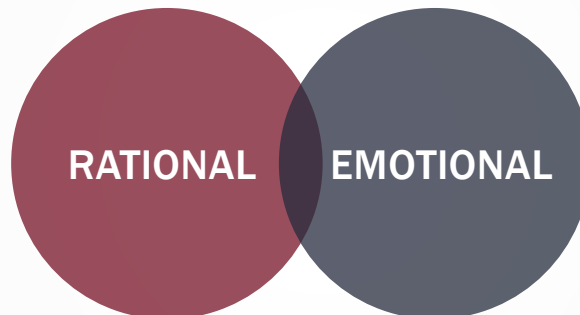
WINNING CITIES OF TOMORROW:

Places for everyone of every race, economic class, gender, and mindset

Where everyone belongs . . . and becomes.

WINNING CITIES WILL BE BIG TENTS

TAP INTO MILLENNIALS: EVERYONE IS SPECIAL, EVERYONE HAS VALUE

Millennial Mindsets:

"I'M SPECIAL" is not comparative as in "I'M BETTER THAN YOU." It's an absolute statement:

"Yes, I'm special, but so are you. And you. And you…"

That means EVERYONE HAS VALUE, and NO ONE IS BEST.

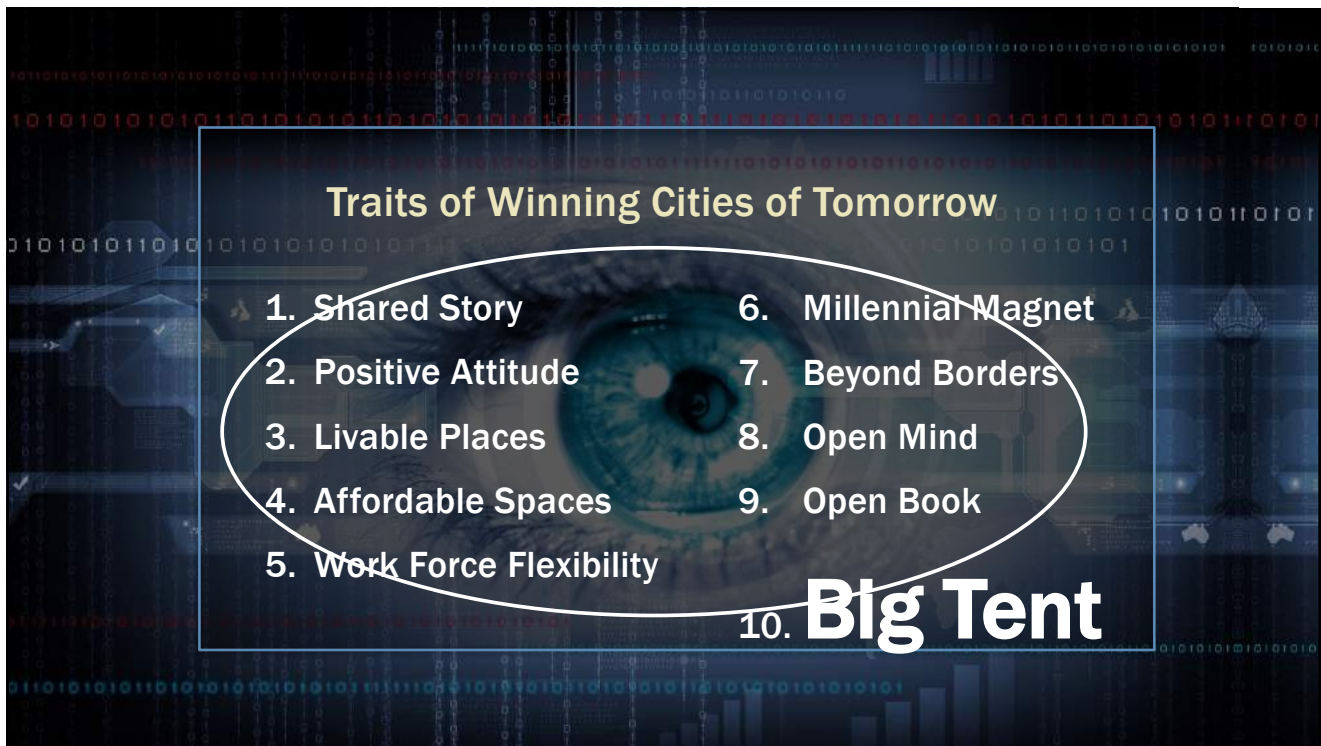## MILLENNIALS SENSE OF "SELF" IS THE COLLECTIVE, IT'S "WE," NOT "ME"

SIR.

Top five strongest drivers of an overall positive feeling by city

YRVA Millennials Study, 2014

Raleigh, NC
n = 198
Washington, DC
n = 199
Charlotte, NC
n = 200
Austin, TX
n = 194
Atlanta, GA
n = 204
Denver, CO
n = 195
Richmond, VA
n= 1,469

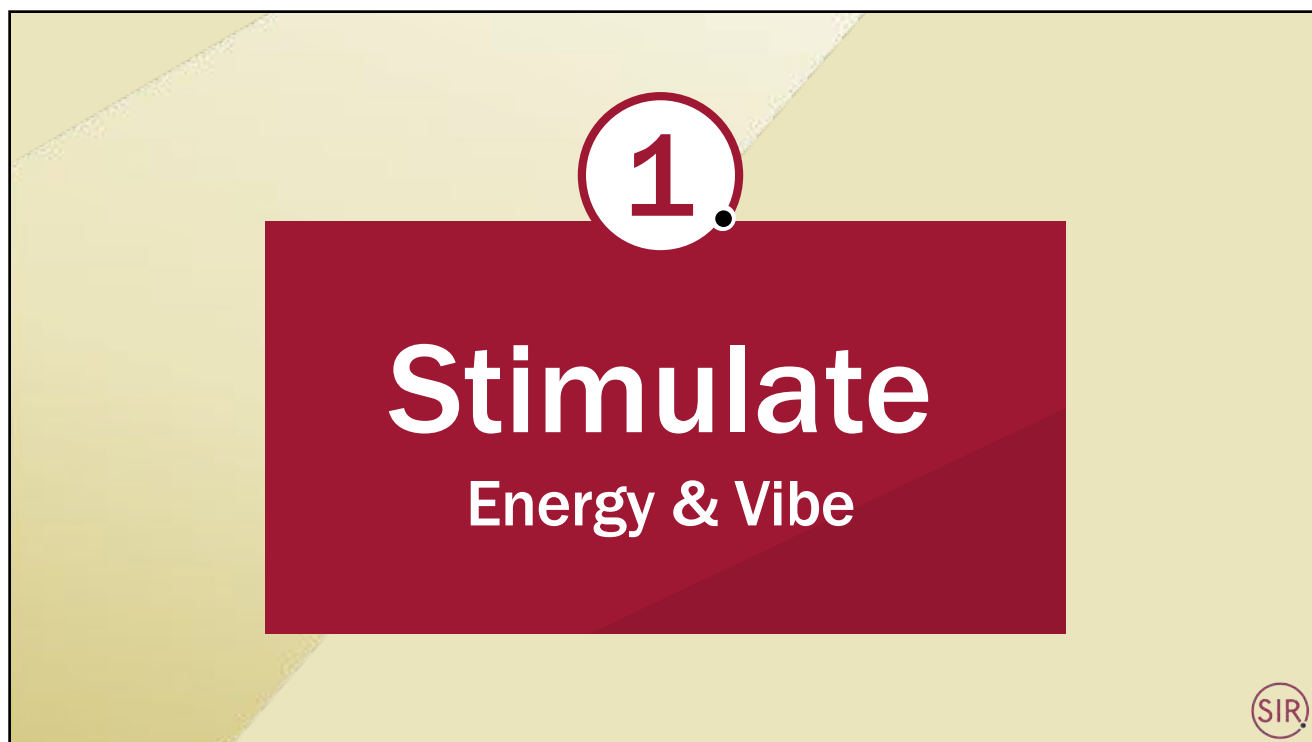| RALEIGH NC	WASH. DC	CHARLOTTE NC	AUSTIN TX	ATLANTA GA	DENVER CO	RICHMOND VA
Has a variety of employment options	Quality and affordability of housing options	Offers a great food scene	Is safe	Has Rich History	Embraces innovation	Offers a great food scene
Offers outdoor recreation options	Has a variety of employment options	Has access to water within the region	Offers a great food scene	Is safe	Offers a great food scene	Urban living environment
Is bike-able/walkable	Is near the mountains	Quality and affordability of housing options	Offers outdoor recreation options	Urban living environment	Is bike-able/walkable	Embraces creativity
Offers a great food scene	Offers an active arts scene	Embraces innovation	Is bike-able/walkable	Has a variety of employment options	Embraces creativity	Embraces innovation
Quality and affordability of housing options	Is safe	Is diverse	Is near the mountains	Embraces creativity	Has a variety of employment options	Is safe

SIR.

Traits of Winning Cities of Tomorrow

1. Shared Story
2. Positive Attitude
3. Livable Places
4. Affordable Spaces
5. Work Force Flexibility

6. Millennial Magnet
7. Beyond Borders
8. Open Mind
9. Open Book
10. **Big Tent**

TODAY'S AGENDA

1 Becoming a Futurist

2 Winning Cities of Tomorrow

3 Today's Imperatives

SIR.