



YouGov®

2025 Urban Readiness Report

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Foreword

Rapid urbanisation is fast redefining the future of cities.



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“*Understanding the challenges and opportunities presented by rapid urbanisation forms the foundation of the ‘2025 Urban Readiness Report’ by Expo City Dubai*”

With 70% of the world’s population expected to live in urban areas by 2050, leaders with vision and commitment are best placed to deal with headwinds and balance regeneration with sustainability.

Consider the change already happening. AI is supporting city leaders’ decision-making, smart mobility is reducing traffic, greenfield cities are accommodating growing populations, and renewable energy is transforming how cities are powered.

However, there are also external influences, including natural disasters, rising sea levels and security concerns.

Understanding the challenges and opportunities presented by rapid urbanisation forms the foundation of the ‘2025 Urban Readiness Report’ by Expo City Dubai. By highlighting the issues that require the most urgent attention and the solutions that will have the greatest impact, we can equip city leaders with actionable insights to inform the management of cities.

In our research, conducted in collaboration with YouGov, we ask how cities have coalesced around critical areas of shared interest and how they are progressing towards becoming more sustainable, technologically advanced and better equipped to handle the challenges of urbanisation and climate change in the next 25 years.

Aligned with Expo City Dubai’s Urban Framework, the report unpacks the complexities of delivering on basic needs (such as healthcare and access to affordable housing) while benchmarking city resilience against economic and environmental shocks.

It also reveals the critical distinction between cities that are ‘smart’ in theory and those that are genuinely smart in practice.

As the new centre of Dubai’s future, Expo City will carry forward these insights as we deliver on a master plan designed as a blueprint for sustainable urban living.

The report will also guide the discourse for the 2025 Asia Pacific Cities Summit (2025APCS) & Mayors’ Forum, hosted by Expo City Dubai on 27-29 October.

For city leaders everywhere, I hope the conclusions from the ‘2025 Urban Readiness Report’ serve as a useful resource, providing insights, context and inspiration to guide your own vision and decision-making for the future of your city.

By Nadia Verjee
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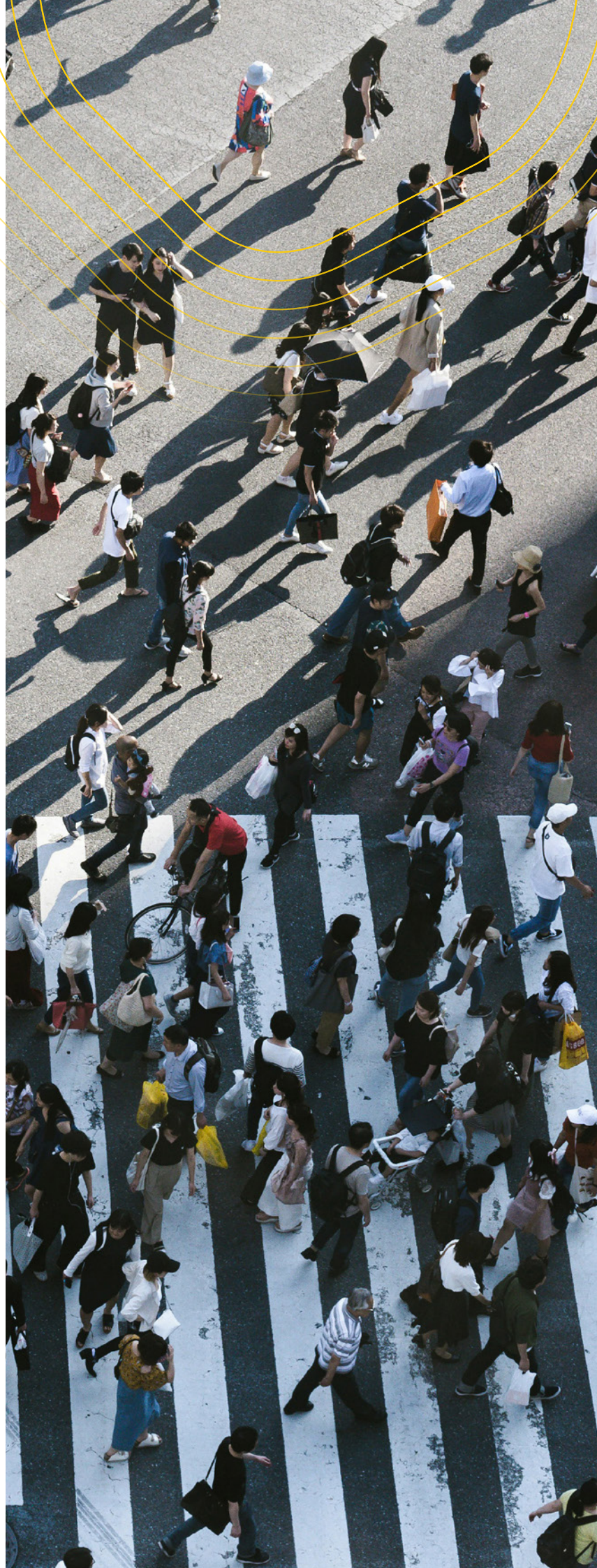
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Executive summary

Cities have undergone significant changes over the past decade, with population growth having a substantial impact on city environments, economies and social cohesion. Now home to more than half of the world's population, cities have expanded outwards, upwards and, in some cases, been built anew.

This trajectory shows no signs of slowing. According to UN-Habitat, 70% of the world's population is expected to live in urban areas by 2050.



Compounding the challenge are climate-related issues, including rising sea levels, urban heatwaves, water scarcity and higher energy demands.

Yet there are plenty of reasons for optimism. Across the globe, city leaders adapting with pragmatic solutions are increasing the quality of life for residents, enhancing resilience to climate events and fostering ecosystems of innovation that are human-centered and address inequitable access to basic needs and essential services.

To understand how cities are responding to rapid urbanisation, Expo City Dubai commissioned YouGov to survey more than 1,000 public-sector leaders worldwide. The resulting report captures insights from city executives and officials across a broad range of public departments, including planning, infrastructure, transport, environment, housing and social services.

The survey covered markets in the United Arab Emirates (UAE), the Kingdom of Saudi Arabia (KSA), Egypt, Morocco, Australia, India, Indonesia, Malaysia, the Philippines, Turkey, the United States of America (USA), the United Kingdom (UK), Germany and Brazil.

For some questions, respondents were asked to select their top three or five priorities or challenges from a longer list of options. The data will be reflected in the programming at the forthcoming 2025 Asia Pacific Cities Summit (2025APCS) & Mayors' Forum and also provide insight to help municipal decision-makers shape city policy and inform decision-making.

Key findings

Preparedness is partial, not absolute

While 46% believe they are fully prepared to manage rapid urbanisation (with strong policies, infrastructure and planning in place), the majority (52%) acknowledge that there is room for improvement and have ground to cover in critical areas such as infrastructure, housing or planning. However, to plug those gaps, three quarters of city leaders express a need to address limitations to funding and governance if they are to build longer-term resilience.

Cities are balancing climate action with the delivery of essential services

When asked to rank their top challenges, the survey reveals a clear tension between climate resilience and the delivery of essential services. Environmental stressors such as urban heat, flooding and wildfires emerge as a leading area requiring urgent intervention over the next five years. Yet this sits alongside challenges relating to core services that directly affect citizens' daily lives; urban mobility, healthcare systems, affordable housing and the infrastructure needed to support rapid urbanisation.

At the same time, 75% of city leaders face a lack of funding that hinders progress towards long-term resilience. As a result, many remain focused on delivering the basic services and utilities that residents rely on. To cope with the scale of the challenge, city leaders say public-private partnerships will accelerate infrastructure development and service delivery, particularly in healthcare.

For many cities digital transformation is a vision still out of reach

Despite excitement around 'smart cities' the majority of city leaders are constrained by a lack of strategy, limited funding, and/or fragmented governance. Interestingly, this is particularly prevalent in cities classified by the World Bank as having a high income per capita (namely the UK, USA and Germany) that are host to brownfield cities, where funding is cited as the biggest barrier.

Shift from places to people

The fact that nearly three quarters of city leaders are prioritising human-centric urban design is aligned to global frameworks such as UN-Habitat's Inclusive Communities, Thriving Cities and People-Centred Smart Cities Programme, which position wellbeing, safety and social inclusion as core to modern urban planning.

However, with fewer than a third of those city leaders embedding people-first policies across all planning decisions, human-centricity remains largely a project-by-project effort rather than an integrated, citywide approach.

Section 1

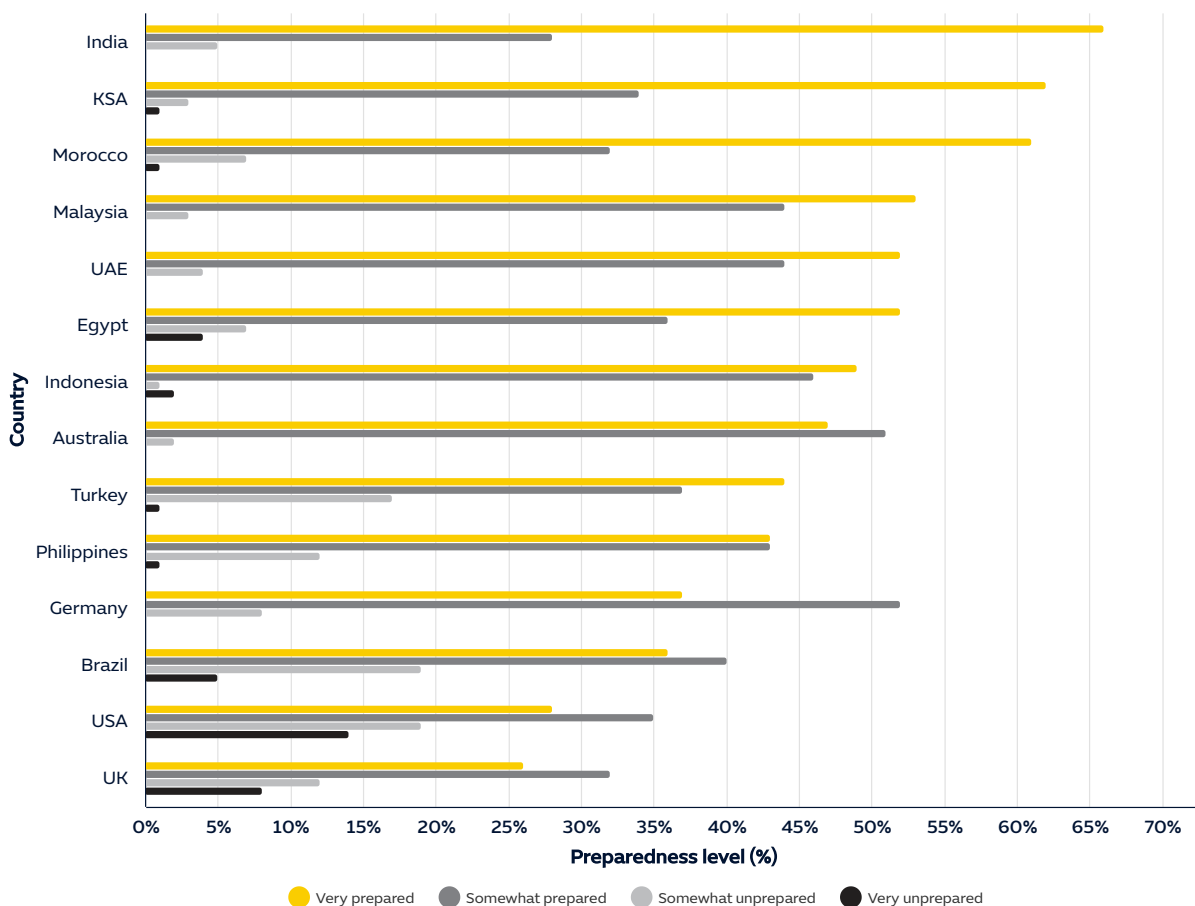
Responses to rapid urbanisation

Rapid urbanisation is not simply a matter of more people. The physical footprint of cities is expanding even faster than their populations. And in many countries covered by the survey, urban land cover has been growing at nearly twice the rate of population growth, which, according to research by UN-Habitat, places an increased demand on mobility, energy provision, the environment and the cost of providing basic services.

However, rapid urbanisation also brings opportunities, with cities now accounting for over 80% of global GDP and serving as engines of innovation, trade and culture. Yet this economic impact also increases the stakes, and while 46% of the city leaders in our survey said they have strong policies and plans to manage rapid growth, the majority still identify gaps in basic areas such as housing and urban planning.

Figure 1

City leaders' responses when asked how prepared their cities are for rapid urbanisation



The data challenges assumptions in that cities in emerging economies (India, KSA, Egypt, Indonesia) are more prepared for rapid urbanisation than those in the mature economies of the UK and the USA where more than one in five cities are unprepared. This suggests that urbanisation pressure is spurring stronger planning efforts in the Global South, while developed cities may be navigating legacy issues and political complexity.

Figure 2

**City leaders' priority list:
the top five challenges
requiring urgent intervention**



**Increasing impact of
climate change and
environmental stressors**



**Limited public health
infrastructure and strain
on healthcare systems**



**Limited access to
affordable and
adequate housing**

**Traffic congestion
and poor urban
mobility**



**Inadequate
infrastructure
to support rapid
population growth**



Inefficient waste
management systems

Difficulty in attracting
investment and reduced
economic competitiveness

Crime and a lack of effective
safety measures

Lag in digital transformation
and smart city adoption

Water scarcity and lack of
food security

Difficulty in attracting
and retaining skilled talent

Limited adoption of circular
economy and resource reuse
practices

Limited social cohesion
and community integration

Slow progress in
decarbonising the built
environment

Insufficient energy supply
and power infrastructure

Siloed governance and poor
inter-agency coordination

Inequitable access
to essential services

City leaders must balance climate adaption with essential services

The increasing impact of climate change is one of the biggest challenges cited by city leaders, with interventions required to cope with environmental shocks (e.g. wildfires, flooding and rising urban heat).

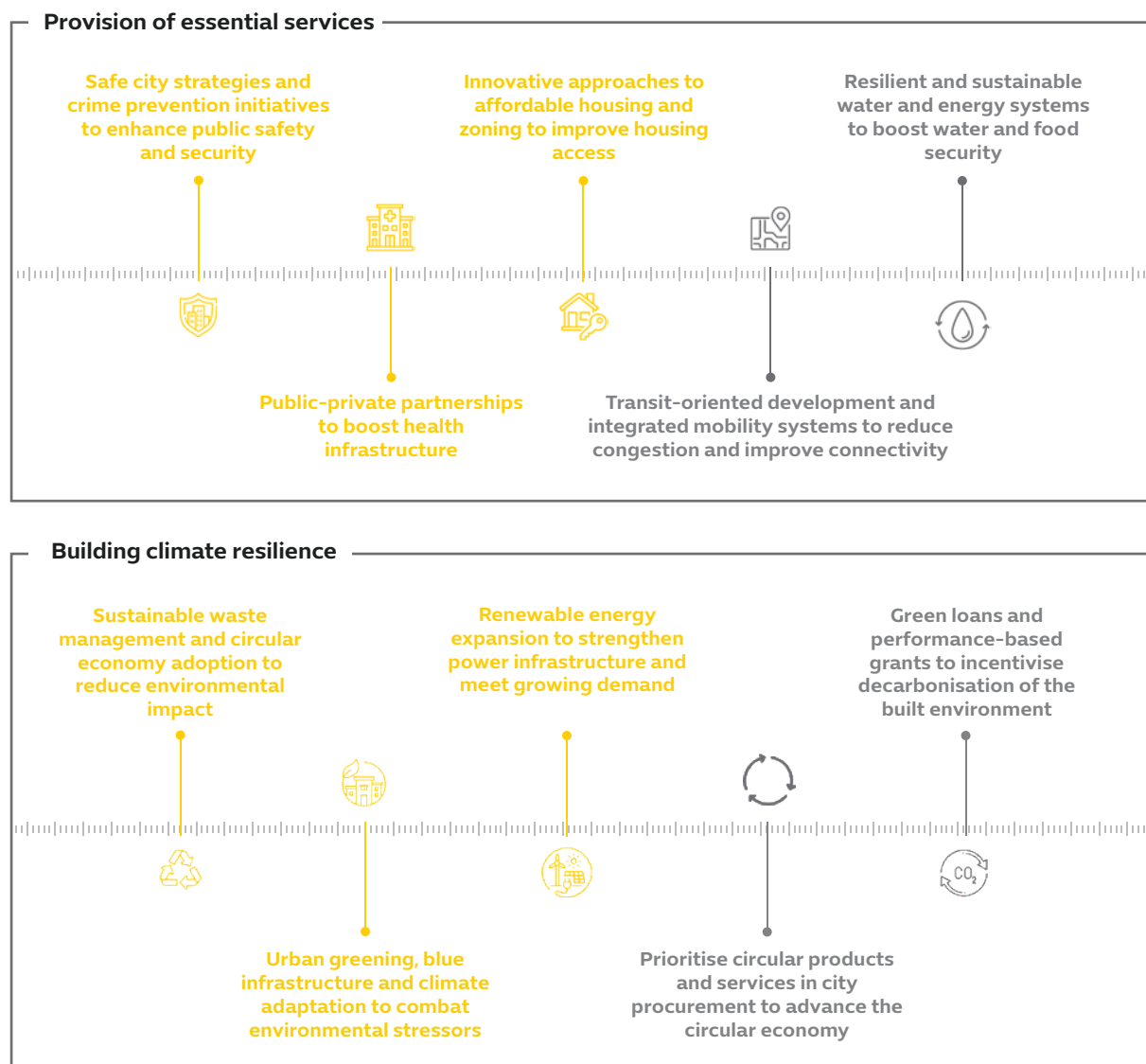
Alongside climate change, the focus is also on the provision of basic needs and essential services that must be addressed to maintain the health, wellbeing and happiness of residents. This includes addressing the strain on healthcare, access to affordable housing, inadequate infrastructure and traffic congestion - all the result of rapid urbanisation.

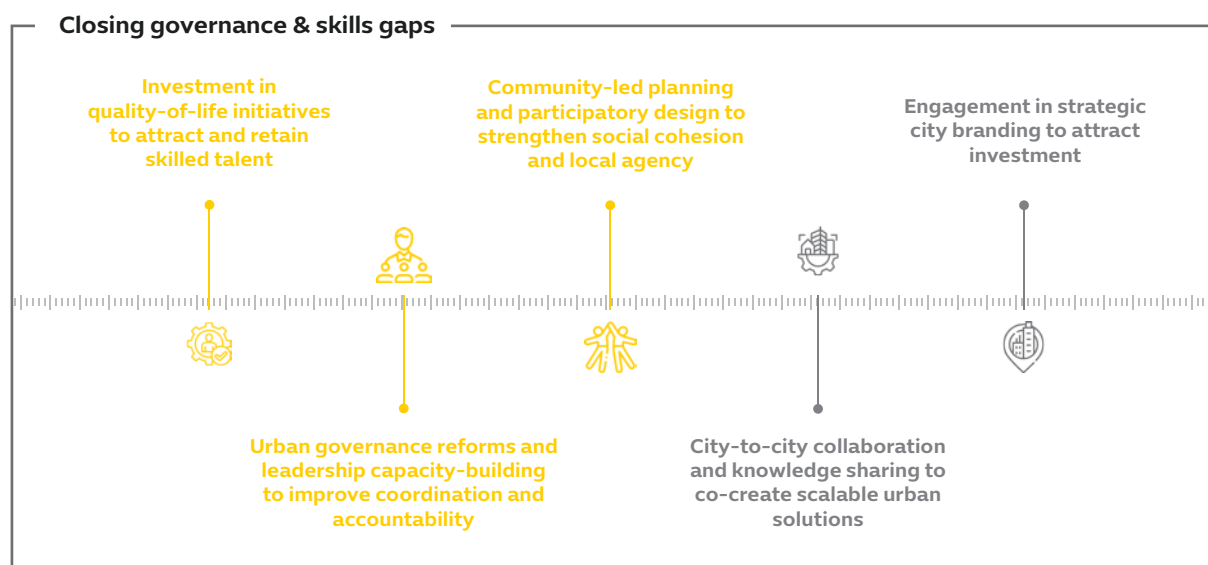
A focus on essential services comes as a priority over digital transformation or decarbonisation of the built environment, suggesting a reframing of resilience around immediate priorities that impact a citizen's basic needs and quality of life.

While lower ranking issues such as inequitable access to essential services, siloed governance and poor inter-agency coordination appear less pressing individually than climate, congestion, or healthcare, together they reveal a pattern of structural weaknesses that threatens cities' ability to deliver on their most ambitious initiatives.

Figure 3

City leaders' top three solutions to the most pressing urban challenges





When segmenting the data by country, a striking contrast emerges in how city leaders approach solutions to urban challenges.

Asia-Pacific countries such as India, the Philippines, Indonesia and Australia prioritise green and circular economy interventions. By contrast, leaders in the Middle East and North Africa (MENA) place stronger emphasis on infrastructure, digital investment and public-private partnerships, consistent with their rapid growth trajectories and ambitious national development plans.

Meanwhile, high-income cities in Europe (UK and Germany) and North America (USA) stand out for their focus on safety, governance reform and social cohesion, but rank lower in terms of climate and circular economy priorities.

Together, these findings suggest that while all cities face similar pressures, their chosen pathways diverge sharply by region, revealing opportunities for knowledge exchange at summits such as 2025APCS.

UN HABITAT

UN-Habitat, a 2025APCS Knowledge Partner, is implementing several projects in Malaysia led by the Urban Planning and Design Branch, including public space, green transport and heritage initiatives in Melaka, as well as support for a smart integrated mobility system in Iskandar. UN-Habitat is also working with the Penang State Government to ensure that future development is aligned to the SDGs, particularly SDG11 (Sustainable Cities and Communities).

Malaysia also has a comprehensive Smart City Framework that underpins coordinated urban transformation, guiding local governments through a roadmap of 16 policies, 36 strategies, and 112 initiatives across key domains, such as mobility, governance, sustainability and economic development. Together, Malaysia's governance, digital strategies, infrastructure modernisation and environmentally conscious pilot initiatives reflect the confidence expressed by its city leaders in dealing with rapid urbanisation.



Section 2

Digital disparity

A panoramic perspective on the digital transformation of cities considers everything from AI and big data to digital twinning, smart city innovation and governance.

With the rapid development of information and digital tools, city leaders have access to powerful resources to achieve their ambitions of enhancing inclusivity, reaching net zero carbon emissions, improving basic public services and boosting capacity-building and collaboration.

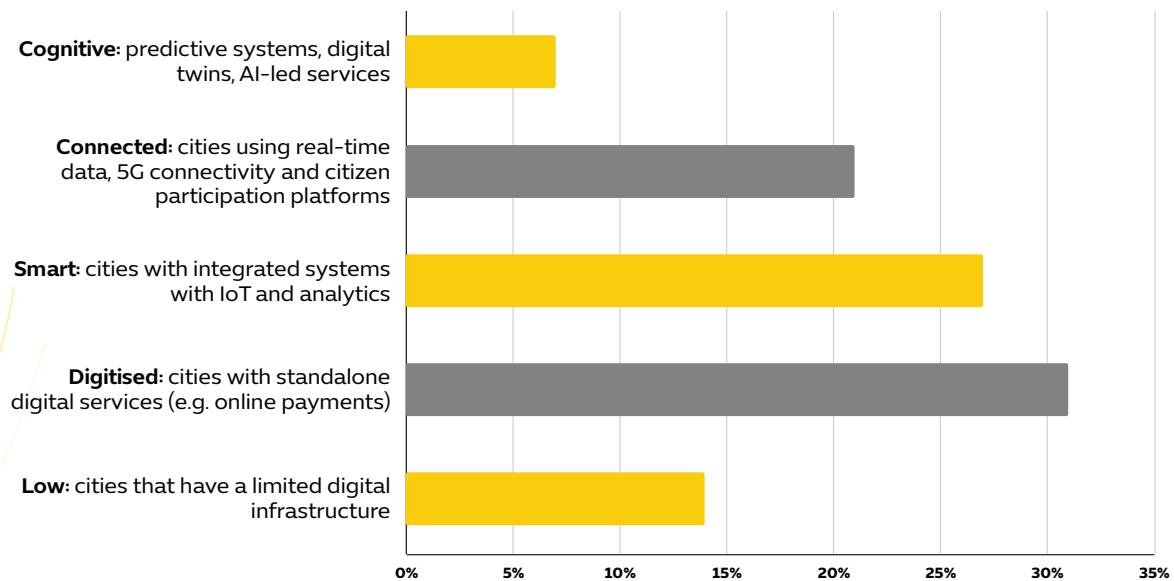
Alongside these opportunities come shared challenges that are forcing cities to think beyond the technologies and adopt a more human-centered approach. In fact, the main barriers to transformation are less about platform interoperability and more about people – around one third of city leaders report a shortage of technical skills in their cities and note that available talent doesn't align with municipal needs.

Although cities everywhere acknowledge that digital transformation is essential, most remain stuck in the middle of their journey — off the ground but not accelerating fast enough towards integrated, intelligence-driven decision-making. While some regions are advancing faster, few have reached the highest stages of maturity, leaving the majority of cities grappling with limited funding, fragmented systems and lack of access to reliable, real-time data.



Figure 4

Leaders' assessment of their cities' current levels of progress towards digital transformation



When benchmarking current levels of digital transformation, the report reveals a digital disparity. While a handful of cities have reached the 'cognitive' stage, with predictive systems and AI-led services, the majority are not accelerating fast enough towards 'connected' systems and using real-time data.

In the high-income economies of Germany, the UK and the US, only 1% of city leaders believe their digital transformation has progressed to the 'cognitive' stage. Those economies cited fragmented coordination across departments and limited funding as the top two barriers prohibiting innovation and digital transformation.

Conversely, 47% of cities in India are using predictive systems (such as advanced data analytics) and digital twinning to simulate how new buildings, roads or transit systems will impact congestion, pollution or energy use.

Across many emerging markets, including the UAE, KSA, Malaysia and the Philippines, one in two leaders describe their cities as progressing from 'smart' to 'connected', using integrated systems with IoT and real-time data with citizen participation platforms.

Figure 5

Top three challenges city leaders encounter on the path to digital transformation

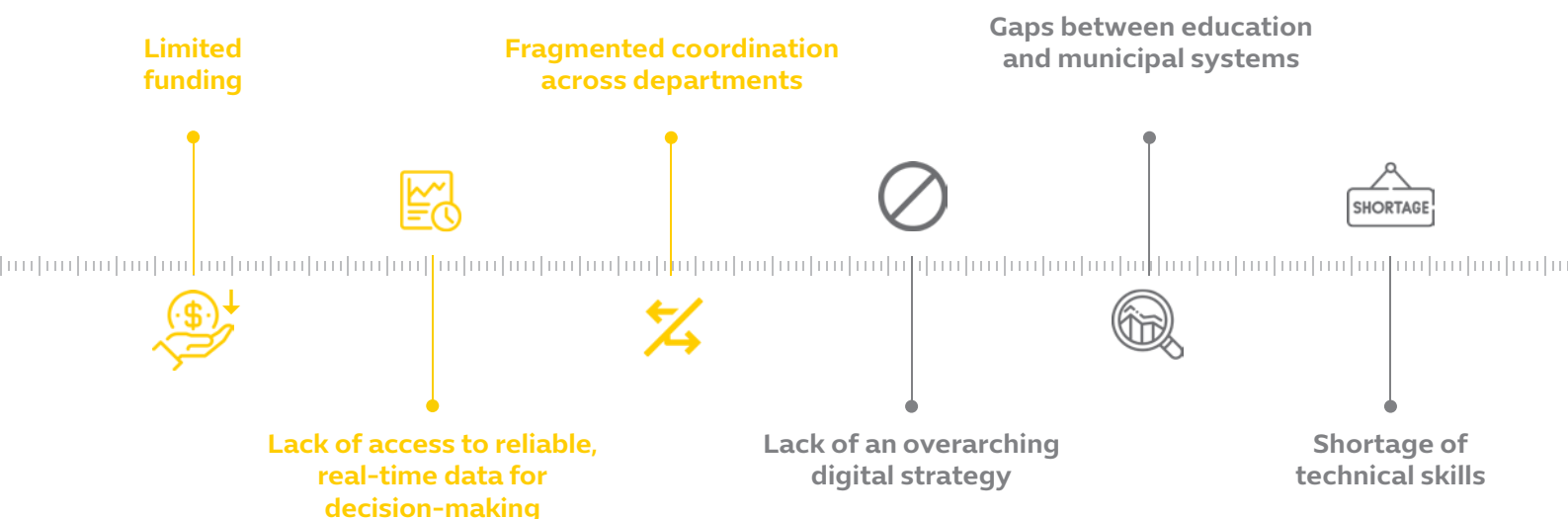
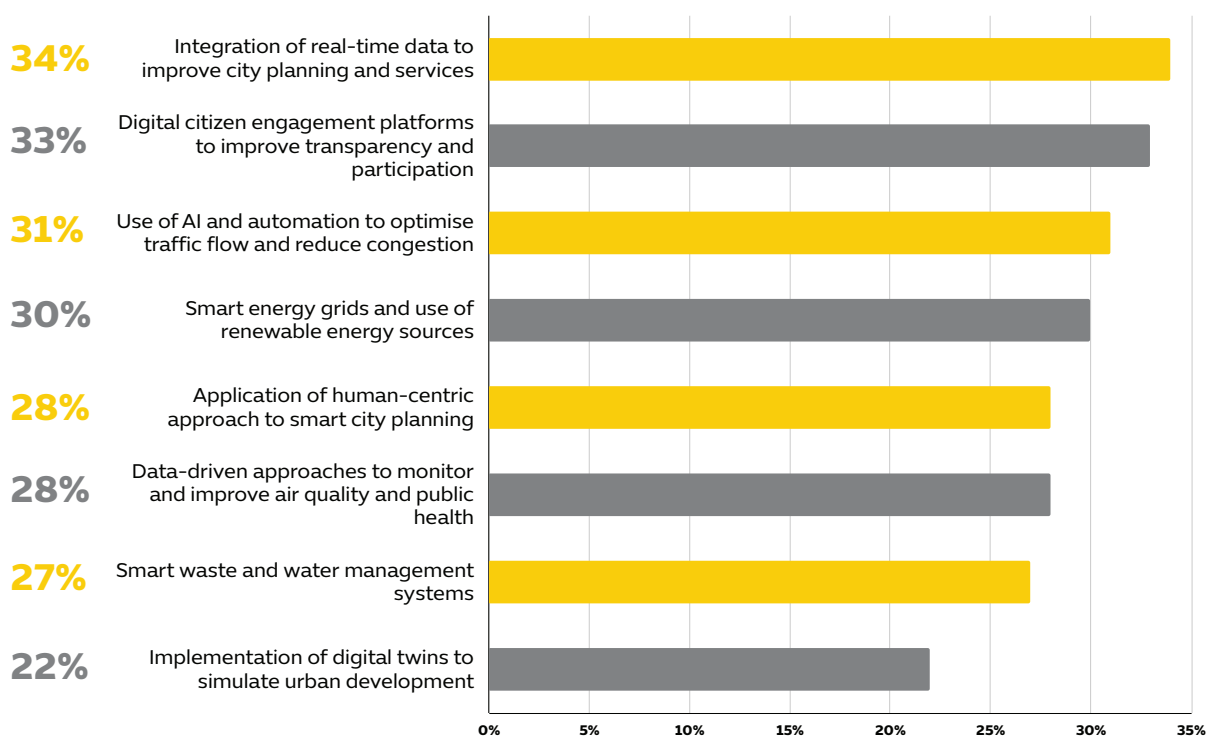


Figure 6

How city leaders are using digital interventions and smart solutions to improve urban living



The survey also reveals regional differences between the challenges cities confront and the solutions they prioritise.

Asia-Pacific cities in countries such as India and Malaysia are leading on real-time data integration and smart energy grids, reflecting their push to combine sustainability with advanced digital infrastructure.

In the MENA region, leaders emphasise digital citizen engagement platforms and AI-driven traffic management, aligning with their significant investment in smart mobility and participatory governance.

By contrast, cities in Europe (UK, Germany) and North America (USA) show higher uptake of human-centric planning approaches and air quality monitoring, but lag in implementing digital twins and automation at scale.

Varanasi's LiDAR-powered digital twin for proactive flood management

In a push towards predictive, smart city capabilities, Varanasi has implemented one of India's most advanced digital twin systems using LiDAR (Light Detection and Ranging) technology.

Developed under the 3D Urban Spatial Digital Twin initiative, the system digitally maps 160sqkm of Varanasi in high detail, utilising aircraft-mounted LiDAR, backpack and vehicle-mounted sensors.

Comprising more than 75 thematic data layers, the digital model offers real-time insights to forecast flood risks, pinpoint vulnerable zones and optimise rescue responses.

The project enables proactive planning and significantly enhances disaster response strategies.

It also equips city officials — including district magistrates and smart city teams — with tools to predict flood zones, strategise relief operations and coordinate across agencies.

Varanasi's LiDAR digital twin exemplifies the 'cognitive' stage of digital transformation, where AI and real-time modelling not only help cities respond to crises but also anticipate and mitigate them.

CASE STUDY



Section 3

Risk and resilience

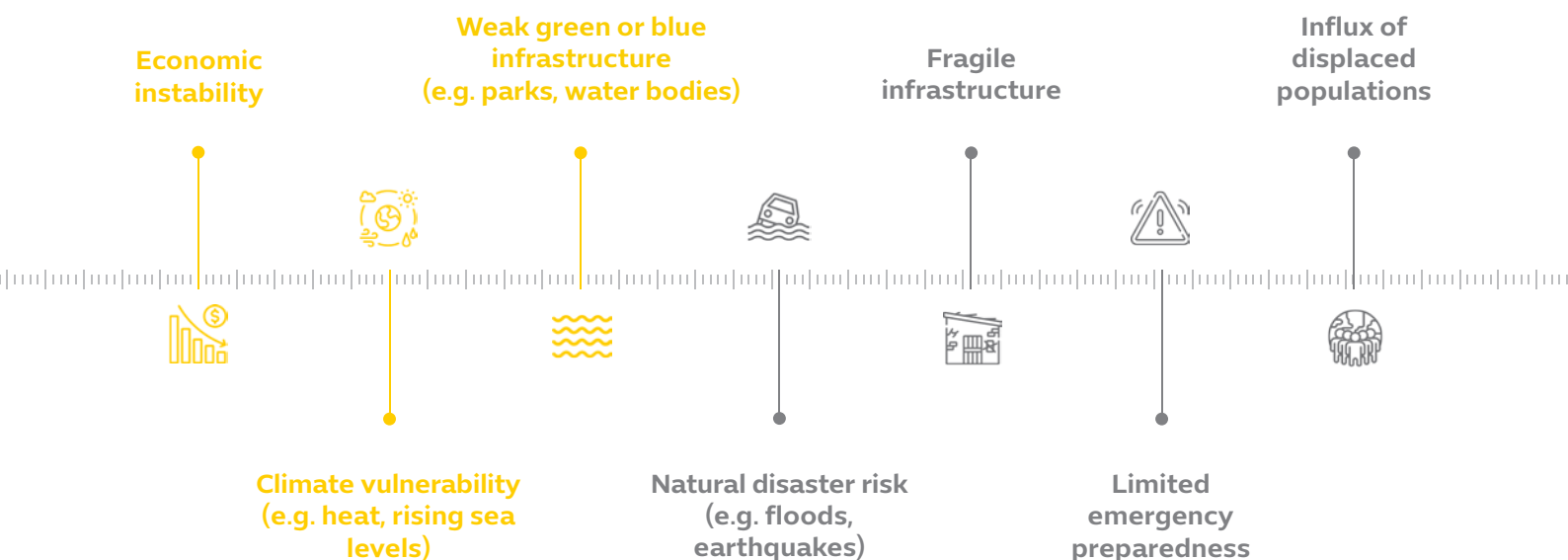
The impact of climate change on cities is now considered inevitable. While leaders acknowledge that urban areas account for almost 70% of global CO₂ emissions, they are faced with challenges in balancing environmental, social and economic resilience - all of which are necessary to ensure cities are liveable, inclusive and financially stable.

For example, innovations such as next-generation solar technology, smart storage systems and decentralised energy grids are enhancing efficiency and directly addressing the emissions emanating from cities. However, these advances cannot reach their full potential without overcoming three major hurdles: limited funding, political constraints and community resistance.



Figure 7

What city leaders identify as their top three challenges to environmental, social and economic resilience



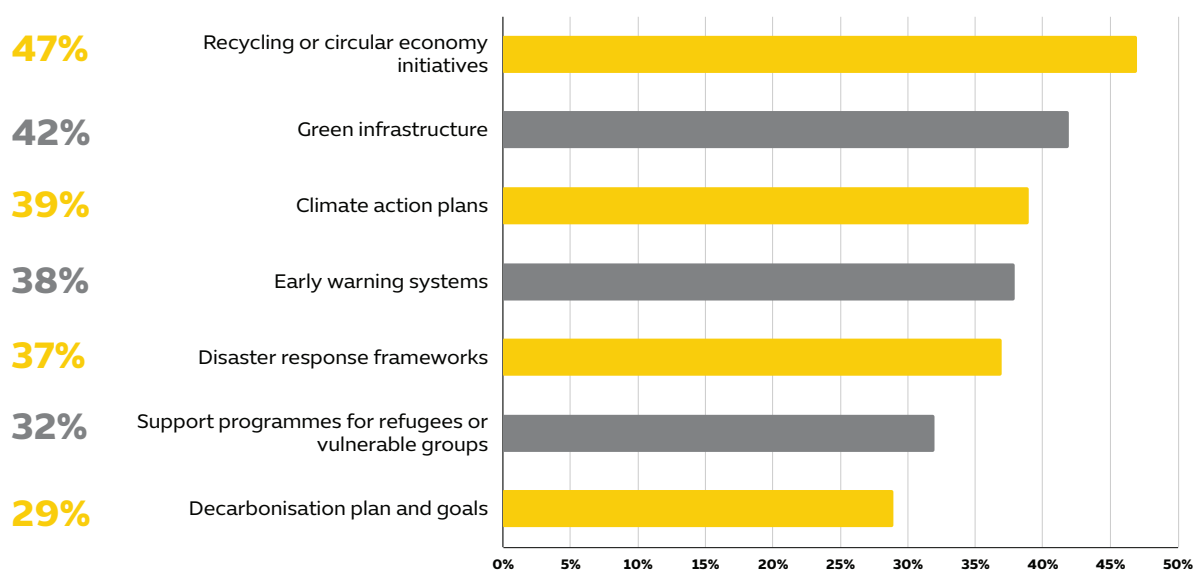
In the world of global trade and economics, the past few years have been anything but quiet and cities and their businesses have contended with a series of financial disruptions, as reflected in the survey, which highlights as much concern around economic resilience as on environmental issues.

This is a particular challenge for cities in Asia Pacific and Africa, where urban areas often contend with a double burden of exposure to climate events and economic fragility.

In high-income economies, displaced populations are cited as a priority more than other regions polled.

Figure 8

City leaders outline the resilience actions their cities have implemented



City leaders appear to prioritise tangible actions, such as recycling and green infrastructure. However, more systemic change, such as decarbonisation and robust emergency preparedness, is less common.

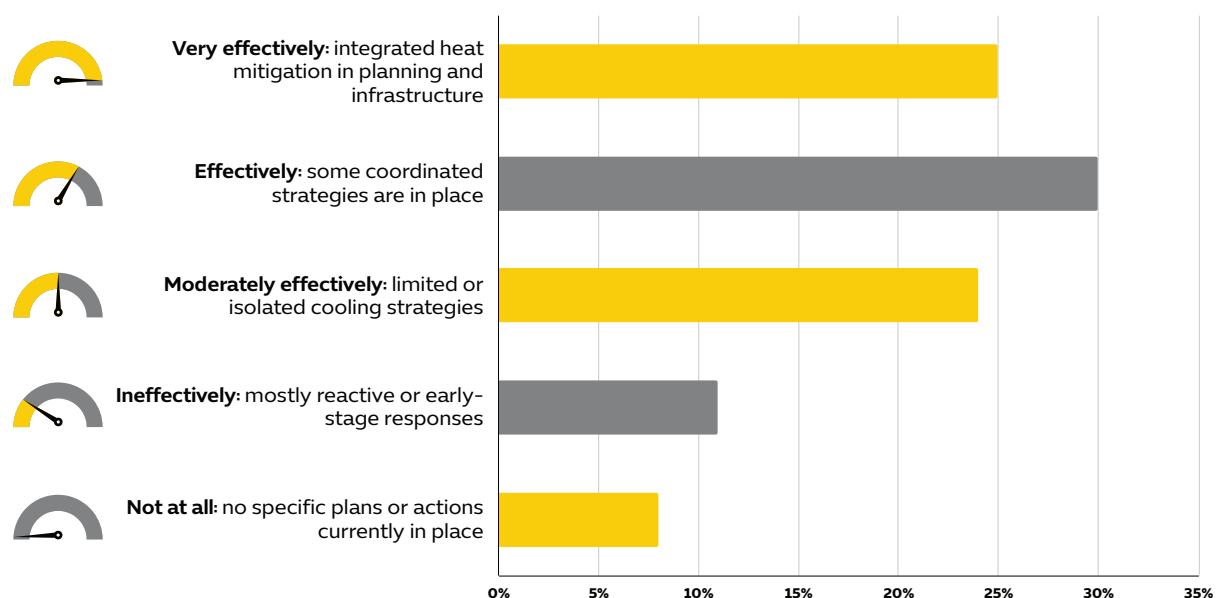
This may be down to the barriers that hinder long-term resilience in cities. When asked how much cities were challenged by a lack of funding, three quarters of leaders said it was a significant impediment to economic and environmental resilience.

This may explain why cities lean towards lower-cost initiatives, rather than resource-intensive solutions such as decarbonisation of the built environment or comprehensive disaster-response systems.

Similarly, three quarters of city leaders cite governance gaps as a barrier to building long-term resilience, with many cities gravitating towards initiatives that offer immediate public appeal.

Figure 9

The level to which city leaders are responding to the challenge of rising urban heat



The survey reveals a stark contrast in how cities in hotter climates are addressing rising urban heat. India leads, with around six in 10 leaders (59%) saying their cities are responding very effectively, followed by strong performances in KSA (41%), Malaysia (40%), UAE (28%) and Australia (27%). By comparison, 23% of city leaders in Egypt and 32% in Morocco report having ineffective or no plans in place to deal with the summer heat.

Section 4

Human-centricity and quality of life

City leaders are increasingly aware that human-centric processes for planning and governing cities are inextricably linked to quality of life for residents. And while technology and infrastructure remain critical components of urban development, resilience and competitiveness now also depend on cities becoming places where people feel a shared sense of belonging.

The survey shows a clear tilt towards this perspective, with 71% of city leaders enhancing civic engagement and community-driven development by embedding people-first policies across safety, wellbeing and inclusion.



Figure 10

The extent to which city leaders prioritise human-centric urban design in decision-making, across safety, wellbeing and inclusion

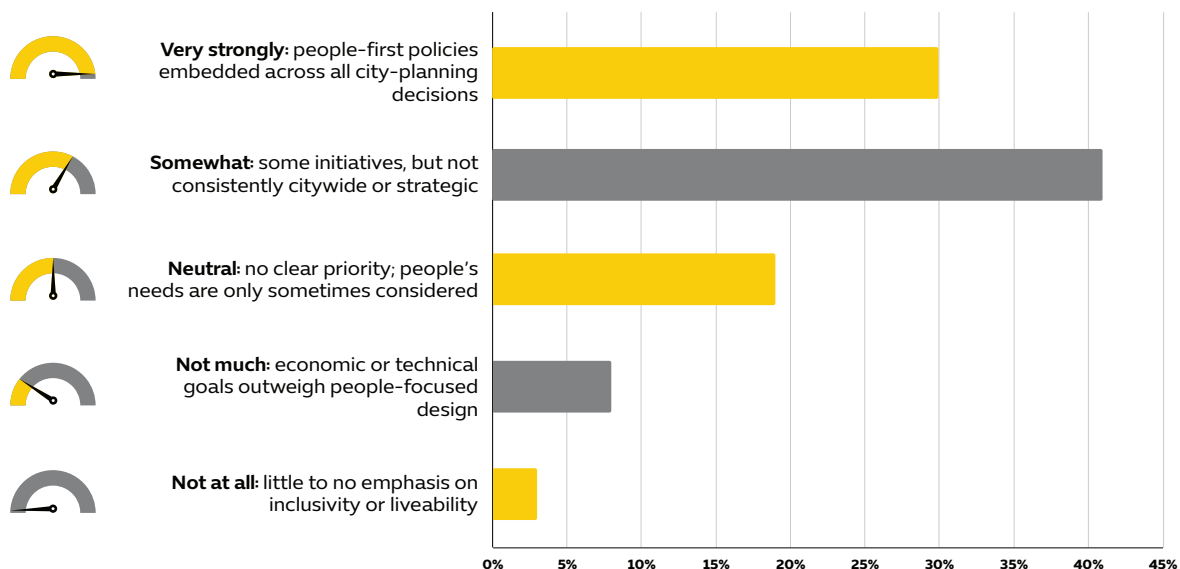
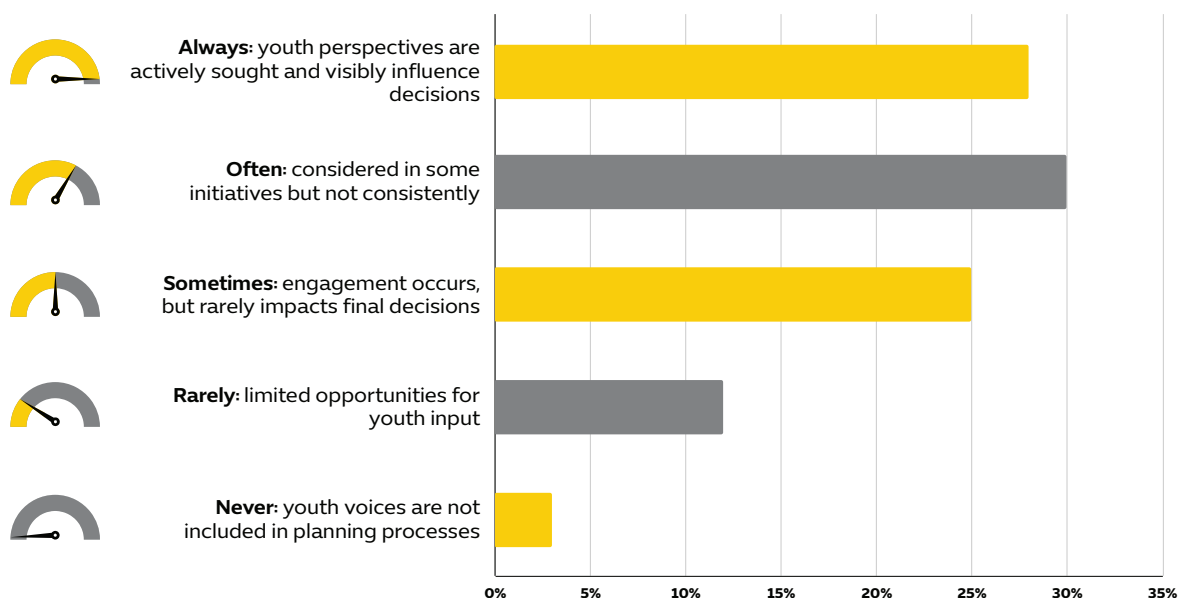


Figure 11

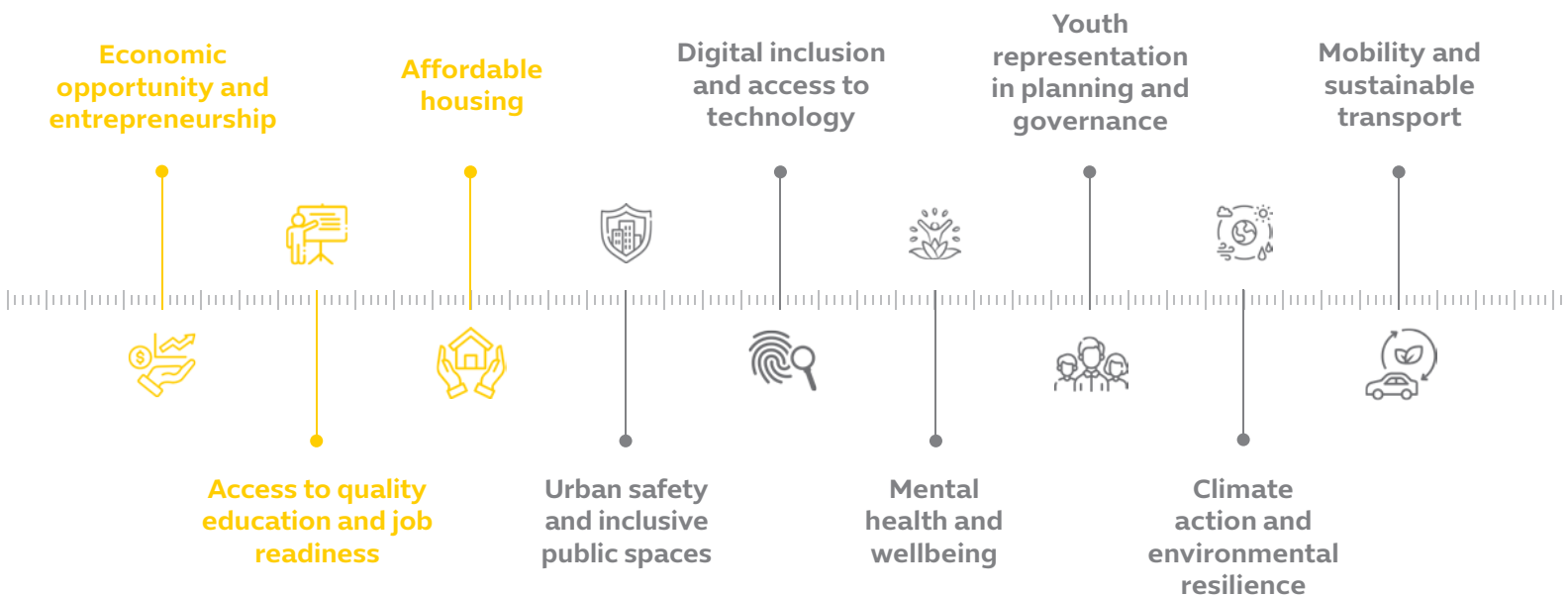
The extent to which the views of young people and young professionals are considered in city planning and policymaking



Youth engagement is a recognised factor in city planning. While 58% of leaders report that young people's views are either 'always' or 'often' considered in decision-making, more than a third of city leaders identify youth disengagement as a significant challenge to social cohesion (See Figure 13). This dual perspective underscores both the progress made and the risks of failing to embed youth voices consistently across policymaking, reinforcing their role as critical stakeholders in shaping inclusive urban futures.

Figure 12

Top three issues young people want action on to ensure a future-ready urban environment



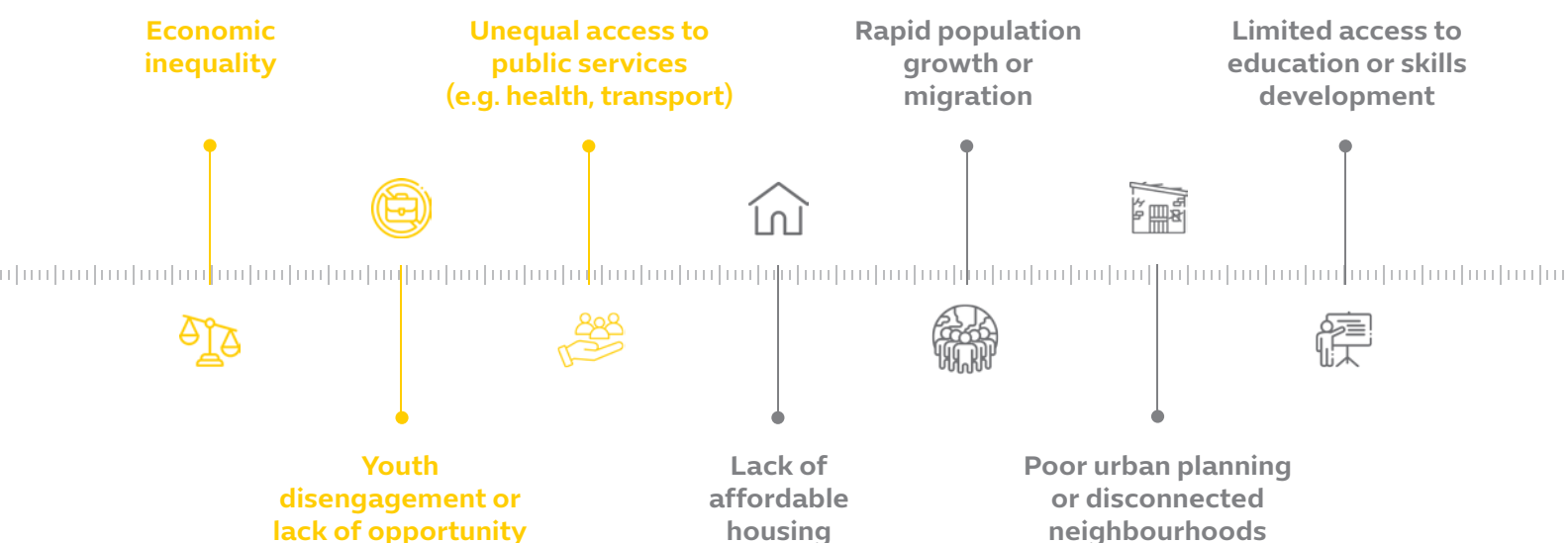
City leaders identify economic inequality as the most significant barrier to building a more socially cohesive society. Reflecting this concern, one in three leaders recognise that young people in their cities want action on expanding economic opportunities and entrepreneurship, highlighting the link between cohesion and future-ready urban environments.

Alongside this, the signalling of mental health and digital inclusion highlights an appetite for policy that fosters happiness, social equity and wellbeing.

In contrast to the priorities of city leaders, mobility and transport was ranked as the lowest priority for young people, suggesting that while still important, infrastructure investments are being reframed as part of a wider social agenda.

Figure 13

The three most significant challenges cities face in their bid to create a more socially cohesive society



For young people and the wider public, communication from city leaders isn't just about information. It's about the management of expectations and trust. In the context of rising urbanisation, climate pressures and digital transformation, clear communication becomes a tool of governance as crucial as infrastructure or funding.

Yet the survey shows that communication remains uneven. While 59% of leaders say their cities communicate effectively or very effectively, nearly one in six indicate their cities leave decisions inadequately explained or fail to communicate them at all. This represents a governance risk. When cities fail to describe policies or set expectations, public trust and social cohesion erode, undermining the foundations of urban resilience.

Figure 14

How effectively city leadership communicates the rationale behind major decisions to the public and business community

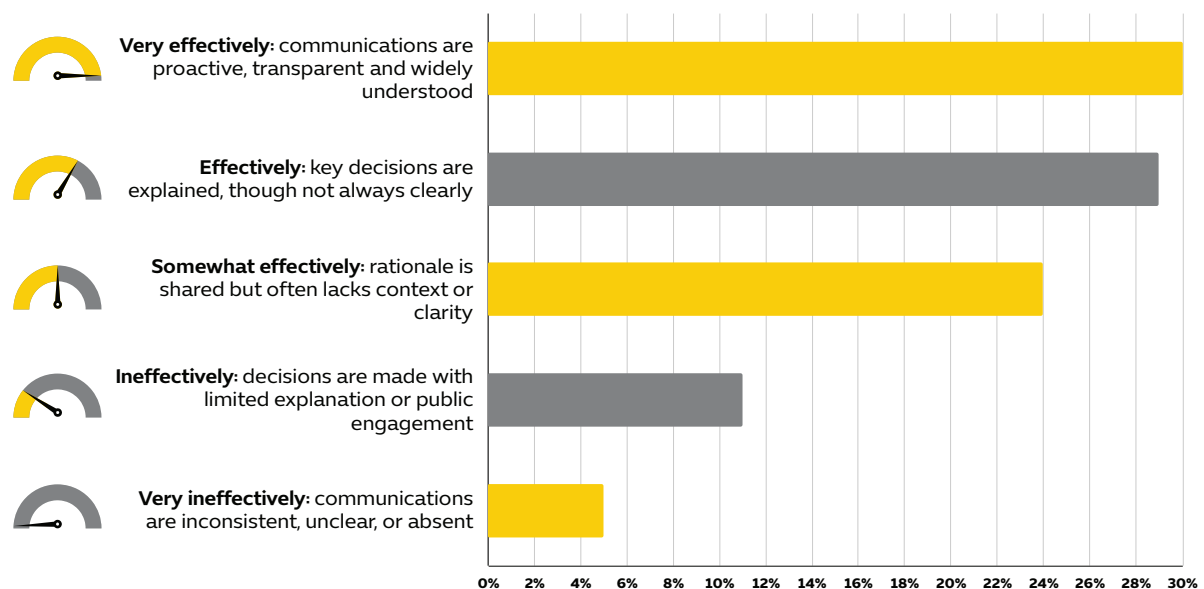
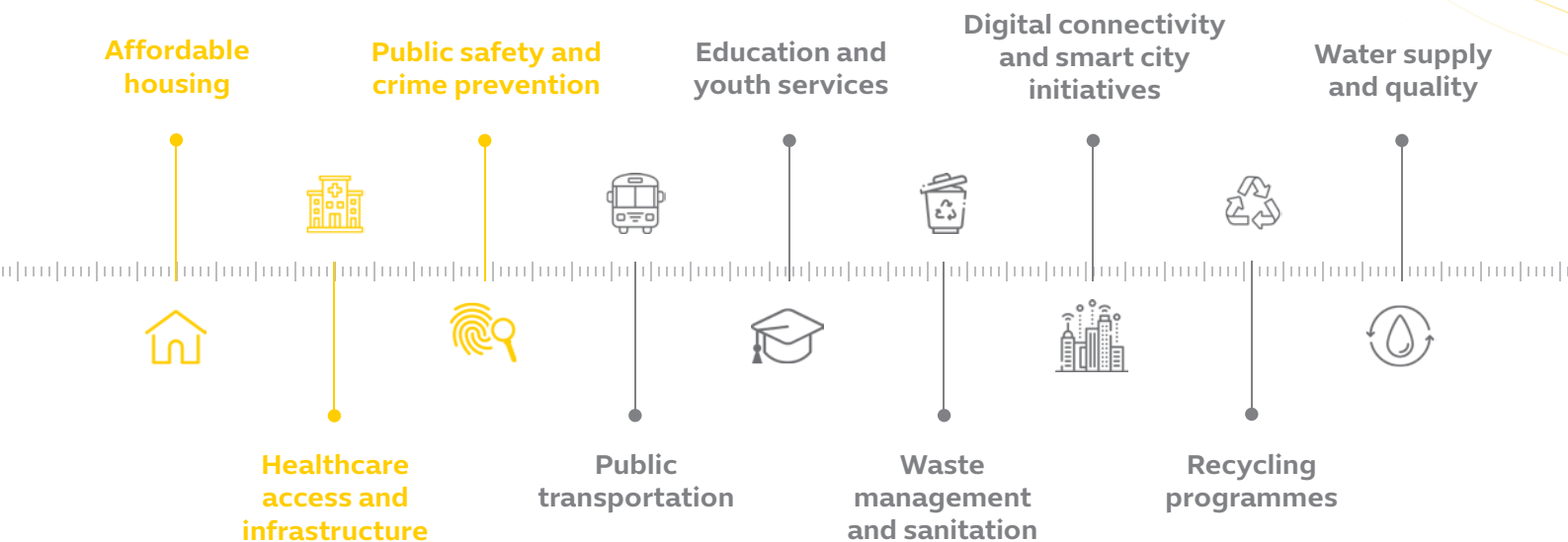


Figure 15

Top three service areas demonstrating the widest gaps between promise and delivery



This shows that the basic needs of housing, healthcare and public safety are the service areas with the biggest gaps between vision and delivery, while core utilities like water and recycling are somewhat less exposed but still notable.

Expo City Dubai: a blueprint for sustainable urban living

Expo City Dubai, the legacy of Expo 2020 Dubai, has evolved into a human-centric city designed to prioritise the health, wellbeing and quality of life for all residents, businesses and visitors.

Situated in the south of Dubai, the city demonstrates how large-scale urban projects can successfully transform from event venues into sustainable, inclusive communities.

Its master plan, designed according to 15-minute principles, sets out a vision where schools, healthcare, retail, parks and amenities are all accessible on foot or by bike.

The city prioritises pedestrians, with shaded walkways, cycling routes and a dedicated metro station, making the entire area more accessible and reducing the reliance on cars.

Over 80% of the original World Expo infrastructure has been retained or repurposed, with many facilities designed to achieve high energy and water efficiency. The site also incorporates renewable energy systems and waste-reduction measures as part of its broader environmental strategy.

With a focus on solutions that make future cities socially, environmentally and economically sustainable, Expo City Dubai is the first urban centre in the MENA region to secure pre-certification under the WELL Community Standard, a global benchmark prioritising health, wellbeing and quality of life.



Conclusion

Cities in 2025 and beyond

In 2025, cities are increasingly shaped by the complex choices they face – balancing climate resilience with the provision of basic needs. This requires careful calibration between distributing limited resources across essential services, and planning for future energy requirements while coping with the realities of climate change.

At the same time, growing populations bring immediate pressures: heightened congestion, stretched infrastructure and added strain on social cohesion and the wellbeing of residents.

Survey findings suggest that addressing this web of interconnected challenges requires approaches that extend beyond isolated efforts or purely technological fixes. Building trust through clear communication and inclusive, people-focused policies – embedded throughout planning processes – emerges as a priority.

Such approaches are reinforced by collaborative planning, where residents, businesses, youth and community groups participate meaningfully in shaping the city's future. With this foundation of trust, city leaders are better positioned to advance strategies that combine nature-based solutions, such as urban greening, with technology-driven innovations, including digital twins and AI-enabled forecasting.

Cities that succeed in aligning ambition with practical action on basic services may be best placed to strengthen resilience and thrive amid the constant disruption that defines our era of rapid urbanisation.



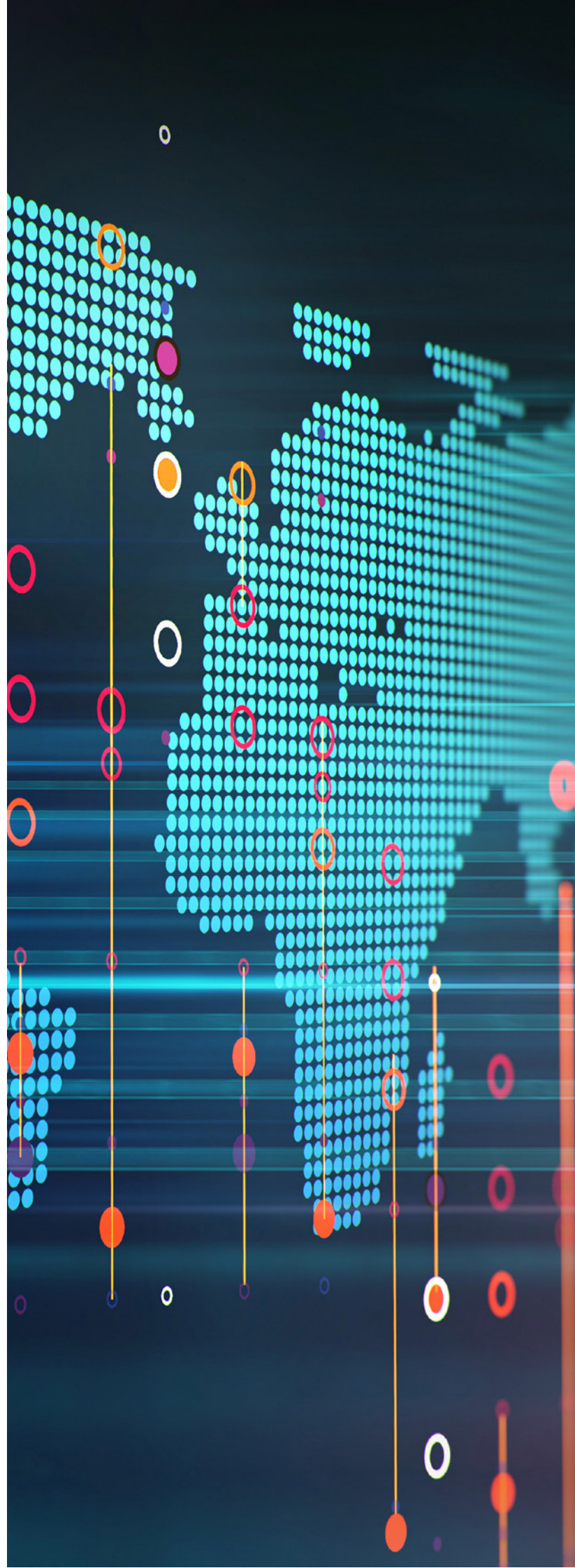
Methodology

The study was conducted by YouGov, a global market research and data analytics firm, on behalf of Expo City Dubai.

Fieldwork took place in August 2025 through an online survey of senior public-sector professionals.

All respondents held director-level positions or higher, and worked in government, academia, public utilities or the mobility sector - ensuring that insights were drawn from decision-makers experienced in the management of cities.

A total of 1,095 surveys were successfully completed across 14 countries, including the UAE, KSA, Egypt, Morocco, Australia, India, Indonesia, Malaysia, the Philippines, Turkey, USA, UK, Germany and Brazil. This diverse geographical coverage allowed for a broad, comparative perspective across both mature and emerging markets.





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Urban Framework**

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