

A Critical Review on the Worldwide Economist Intelligence Unit, Mercer and Monocle Quality of Life Indicators

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Abstract: This article discusses selected worldwide indicators on quality of life vis-à-vis liveability. It comprises indicators promulgated by the Economist Intelligence Unit (EIU), Mercer (The global human resources consulting firm) and Monocle (The culture and lifestyle magazine). By index, the EIU refers it as Global Liveability Index; Mercer calls it Quality of Living Index while Monocle means it as Most Liveable City Index. The first index consists of 30 indicators grouped under 5 categories; the second constitutes 39 indicators broken down into 10 groups and the third is made up of 11 indicators with an addition of 22 metrics for its 2016 assessment. The study employed meta-ethnography qualitative approach by in-depth analysis and synthesis on the respective set of indicators. It is a systematic approach that enables comparison, analysis and interpretations to be made that can facilitate theorizing and practice. The analysis revealed the commonalities and differences amongst the three set of quality of life indicators. The result suggests that they are common in the sense that all of them are revolving around the five domains throughout their indicators, i.e., politics, economics, social, environment and infrastructure. However, they seem to be different in terms of the weightage given to each category of indicators and their detailing as the analysis on the top ten cities under respective organization revealed. Nonetheless, these commonalities and differences are contingent upon the respective organizational aim and objectives, methodology and emphasis. In short, one outstanding finding is that there is no “one-size-fit-all” kind of indicators as far as quality of life is concerned. It means different things to different people. Indeed, other factors that come into play include the culture and social system, the political and economic dimensions, and the environment.

Key words: quality of life; liveability; sustainability; index

JEL codes: F

1. Introduction

There is a number of worldwide indicators used to measure quality of life vis-à-vis liveability. Among the more prolific organizations that survey quality of life on a consistent basis are the Economist Intelligence Unit (EIU), Mercer (The global human resources consulting firm), and Monocle (The culture and lifestyle magazine). For that reason, this study focuses on these three organizations and reviews their indicators. Another striking point

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is that these three organizations rank cities according to their quality of life which spark propaganda and branding of cities. These facilitate corporations in their decision-making and serve as a guide when sending their executives, managers and workers to the cities and compensate them with commensurate allowances. The ranking also woos expatriates, businessmen, investors and boosts the tourism industry of the cities. However the indicators used are not free from criticisms as there are no “one-size-fit-all” indicators (Mebratu, 1998; Philips, 2010; Adam, 2012; Zahoor, 2015). Debates have been going on as to the rationality of the indicators used and the resultant cities ranked as most liveable cities. This is because quality of life and liveability are subjective; imply different things to different people.

Thus, this study aims to critically review the three selected worldwide organizations’ indicators relating to quality of life, liveability and sustainability¹. In this article however, the terms quality of life and liveability are interchangeably used. An analysis of the commonalities and differences among those worldwide indicators are undertaken and factors that contribute to those commonalities and differences are identified. Furthermore, this study elaborates the world organizations’ liveability indicators through the literature reviews in section 2. Section 3 spells out the methodology in conducting this study followed by analysis and discussion in section 4. Finally section 5 concludes the study with some salient points on the existing worldwide liveability indicators.

2. Cities’ Quality of Life Ratings

The effort to rate cities as most liveable thereby reflecting quality of life is commendable. For the purpose of this study, liveability means the acceptable quality of life that offer comfort and standard of living to expatriates as well as residents who are staying in those cities. For town planners and city managers, the indicators used to qualify cities as liveable means that the living conditions of peoples in those cities are of high standards and if not, then it warrants proper planning, strategies and appropriate investments for development in the long run. Quality of life is directly related to liveability and the latter is very much influenced by the fulfillment of the Physical Survival needs, Physical Safety Needs, Love and Belonging Needs, Self-esteem Needs and to be Self-fulfilled (Self-actualised), i.e., the need for self-fulfilment and to develop all aspects of living — physical, social, emotional and spiritual (Maslow, 1971; Bartuska, 1981; Mebratu, 1981). Subsequently, liveability in turn need to be sustained not only for the present inhabitants but to be enjoyed by future dwellers thus fulfilling the goal of sustainability and sustainable development (Sustainable development being defined as meeting the needs of the present without compromising the needs of future generations — Our Common Future, also known as the Brundtland Report, from the United Nations World Commission on Environment and Development (WCED) published in 1987).

Quality of life and liveability of cities rating have been made popular by three remarkable world organizations namely the EIU, Mercer, and Monocle since a decade ago. Even though they use different nomenclatures they are concerned about the same things, i.e., liveable cities rating and ranking. However, the indicators they use are varied and cover a wide spectrum.

¹ Further elaboration by the authors on the terms could be found in “Contextualizing the Islamic Fundamentals in the Contemporary Concepts of Sustainability, Liveability and Quality of Life in the Built Environment” published in *Middle-East Journal of Scientific Research* (2015), Vol. 23, No. 6, pp. 1249-1256.

3. The Economist Intelligence Unit (EIU)²

The EIU's Global Liveability Index is based on 30 indicators in 5 categories with their assigned weightage namely: (1) Stability (25%), (2) Culture and Environment (25%), (3) Infrastructure (20%), (4) Healthcare (20%), (5) Education (10%). However, the percentages have been adjusted upon the insertion of sixth category, i.e., Spatial Characteristics. This new category seeks to account for spatial aspects of city life to include urban form, the geographical situation of the city, cultural assets and pollution (see Table 1)³. The weightage distribution seems to indicate the level of importance of those categories that influence quality of life and liveability in cities. But these are for expatriates, businessmen and visitors who are coming to stay and work in those cities. That is why stability, is of prime consideration followed by culture and environment which offer quality living and comfort for those people to enjoy. Meanwhile, the EIU also conduct Worldwide Cost of Living survey twice yearly (updated every June and December) that compares more than 400 individual prices across 160 products and services. These include food, drink, clothing, household supplies and personal care items, home rents, transport, utility bills, private schools, domestic help and recreational costs. The survey incorporates comparative cost-of-living indices between cities. The survey enables human resources line managers and expatriate executives to compare the cost of living in over 130 cities in nearly 90 countries and calculate fair compensation policies for relocating employees⁴.

4. Mercer (The Global Human Resources Consulting Firm)⁵

The Mercer's Quality of Living index is relatively the most popular because it is based on a whole array of indicators consisting of 39 indicators grouped into 10 categories (see Table 1). Subsequently, Mercer's ranking of cities further categorize them as ideal, acceptable, tolerable, uncomfortable, undesirable and intolerable to live in. The level of liveability is reflected via percentages as follows:

- (1) 80-100% liveable means that there are a few challenges to living standards.
- (2) 70-80% liveable means that the day-to-day living is fine but some aspects of life may entail problems.
- (3) 60-70% liveable means that there are negative factors impacting day-to-day living.
- (4) 50-60% liveable means that liveability is substantially constrained.
- (5) 50% or less liveable means that most aspects of life are severely restricted.

Hence based on these liveability levels, commensurate compensation fees will be given to the assignees to those cities⁶.

² The Economist Intelligence Unit (EIU) is the research and analysis division of The Economist Group and the world leader in global business intelligence. Created in 1946, has 70 years' experience in helping businesses, financial firms and governments to understand how the world is changing and how that creates opportunities to be seized and risks to be managed.

³ http://pages.eiu.com/rs/783-XMC-194/images/Liveability_August2016.pdf.

⁴ <https://knoema.com/lkzuurc/eiu-worldwide-cost-of-living-report-2>.

⁵ Mercer is a global consulting leader in talent, health, retirement and investments offering clients advice and solutions in the areas of risk, strategy and people. Mercer's more than 20,000 employees are based in 43 countries, and the firm operates in over 140 countries.

⁶ <https://www.imercer.com/content/mobility/quality-of-living-city-rankings.html>.

Table 1 The Three World Organization's Liveability Indicators

Economist Intelligence Unit(Global Liveability Index)					
1. Stability (18.75%) - prevalence of petty crime - prevalence of violent crime - threat of terror - threat of military conflict -threat of civil unrest/conflict		2. Culture and environment (18.75%) -humidity/temperature -discomfort of climate to travellers - level of corruption -social or religious restrictions -level of censorship -sporting availability -cultural availability -food and drink -consumer goods and services		3. Healthcare (15%) -availability of private healthcare -quality of private healthcare -availability of over-the-counter drugs -quality of public healthcare -availability of public healthcare -general healthcare indicators	
4. Education (7.5%) -availability of private education -quality of private education -public education indicators		5. Infrastructure (15%) -quality of road network -quality of public transport -quality of international links -availability of good quality housing -quality of energy provision -quality of water provision -quality of telecommunications		6. Spatial characteristics (25%) -green space -sprawl -natural assets -cultural assets -connectivity -isolation -pollution	
Mercer(Quality of Living Index)					
1. Political and social environment -relationship with other countries -internal stability -crime -law enforcement -ease of entry & exit		2. Economic environment -currency exchange regulations -banking services		3. Socio-cultural environment -media and censorship -limitation on personal freedom	
4. Public services and transport -electricity -water availability -telephone -mail -public transport -traffic congestion -airport		5. Recreation -variety of restaurants -theatrical & musical -performances -cinemas -sports & leisure activities		6. Consumer goods -meat & fish -fruits & vegetables -daily consumption items -alcoholic beverages -automobiles	
7. Housing -housing -household appliances & furniture -household maintenance & repair		8. Schools and education -standards and availability of international schools		9. Natural environment -climate -record of natural disasters	
10. Medical and health considerations -hospital services -medical supplies -infectious diseases		-water potability -sewage -waste removal		-air pollution -troublesome & destructive animals & insects	
Monocle (The most liveable cities index)					
1. Pro-active policy developments		2. International connectivity	3. Tolerance	4. Medical care	5. Public transport
6. Urban Design	7. Safety/crime	8. Business conditions	9. Quality of architecture	10. Environmental issues and access to nature	11. Climate/sunshine

Source: <https://knoema.com/lkzuur/eiu-worldwide-cost-of-living-report-2>,

<https://www.imercer.com/content/mobility/quality-of-living-city-rankings.html>,<https://monocle.com/film/affairs/top-25-cities-2016/>

5. Monocle (a British lifestyle magazine)⁷

The Monocle's list used to be based on eleven indicators (see Table 1). It has now been revised to include 22

⁷ Since 2006, the lifestyle magazine *Monocle* has published an annual list of liveable cities. The list in 2008 was named "The Most Liveable Cities Index" and presented 25 top locations for quality of life.

distinct metrics — from the number of international routes that connect them to the rest of the world, to the amount of violent crime, to the availability of outdoor seating, housing and the cost of living, from the price of a three-bed house to the cost of a coffee, glass of wine and decent lunch, healthcare, education and business climate as well as how close a city is to beaches and mountains⁸. Here, “Quality of Life” is calculated in a way that is less concerned with per capita GDP and more interested in how easily one can directly travel to international destinations. With its “nocturnal metrics”, like how late clubs stay open, Monocle emphasize that a high quality of life is a 24-hour affair and may not necessarily coincide with city features that are traditionally attractive to corporations⁹.

The three organizations rating are calculated via both the qualitative as well as the quantitative methodologies. Basically the qualitative rating is based on judgments of their in-house expert country analysts and field correspondents based in each city. For quantitative variables, a rating is calculated based on the relative performance of a location using external data sources or points. The scores are then compiled and weighted to provide a score.

In summary, Table 1 illustrates the three world organizations’ categories of indicators followed by Table 2 which presents the top ten cities according to the three world organizations survey result for the year 2016 (subject to their respective duration of months of the study). The result of the ten top cities in Table 2 involves ten countries altogether notably Germany, Australia, Japan, Canada, Switzerland, Austria, New Zealand, Denmark, Sweden and Finland (analysis on their respective cities is in Table 4).

Table 2 Top 10 Cities 2016 According to EIU, Mercer, and Monocle

No	Economist intelligence unit (Global liveability index) (140 cities)	Mercer (Quality of living index) (230 cities)	Monocle (Most livable city index) (203 cities)
1	Melbourne, Australia	Vienna, Austria	Tokyo, Japan
2	Vienna, Austria	Zurich, Switzerland	Berlin, Germany
3	Vancouver, Canada	Auckland, New Zealand	Vienna, Austria
4	Toronto, Canada	Munich, Germany	Copenhagen, Denmark
5	Adelaide, Australia	Vancouver, Canada	Munich, Germany
6	Calgary, Canada	Dusseldorf, Germany	Melbourne, Australia
7	Perth, Australia	Frankfurt, Germany	Fukuoka, Japan
8	Auckland, New Zealand	Geneva, Switzerland	Sydney, Australia
9	Helsinki, Finland	Copenhagen, Denmark	Kyoto, Japan
10	Hamburg, Germany	Sydney, Australia	Stockholm, Sweden

Source: <https://knoema.com/lkzuur/eiu-worldwide-cost-of-living-report-2>,

<https://www.imercer.com/content/mobility/quality-of-living-city-rankings.html>, <https://monocle.com/film/affairs/top-25-cities-2016/>

6. Methods

It is the aim of this study to review the indicators used to evaluate the quality of life of cities worldwide consequently to identify their points of commonality and departure. For that purpose, extensive review of literatures on the indicators was conducted examining the relationship between them eventually to determine their common themes. Internet published materials suggest that there are several organizations that are specialized in

⁸ <http://www.news.com.au/lifestyle/real-life/news-life/monocles-2015-quality-of-life-survey>.

⁹ <https://monocle.com/film/affairs/top-25-cities-2016>.

the area of quality of life studies. This study selected EIU, Mercer and Monocle from their relatively available online materials though to a certain extent the contents are quite restrictive since they are commercialized entities. The enlisted indicators under these three organizations' web pages were analyzed and synthesized using meta-ethnography method. Interpretive meta-ethnography is a systematic approach that enables comparison, analysis and interpretations to be made that can inform theorizing and practice. Subsequently the analysis will expand into second-order interpretations. According to Savin-Baden et al. (2008, p. 3), it is "not only comparing data across the studies, but also revisiting metaphors, ideas, concepts and contexts" within the original studies. Thus, the selected three worldwide indicators were analyzed to identify their commonalities and differences. The outcomes of the analysis were then synthesized to develop a third-order interpretations that went beyond the mere comparisons of the findings of all the studies. Finally, the study succeeded in the review of the commonalities and differences amongst the worldwide quality of life indicators.

7. Analysis and Discussion

Indicators used by the Economist Intelligence Unit (EIU), Mercer (The global human resources consulting firm) and Monocle (The culture and lifestyle magazine) have been studied. The Mercer's Quality of Living index is relatively the most popular because it is based on a whole spectrum of indicators consisting of 39 indicators grouped into 10 categories. The EIU's Global Liveability Index is based on 30 indicators in 5 categories while the Monocle's Most Liveable Cities Index considers 11 indicators (with an addition of another 22 metrics). Upon close examination, all of them share the main objective that is to enable multinational companies and other employers to compensate employees fairly when placing them on international assignments. Employee incentives include a quality-of-living allowance and a mobility premium. On top of that they revolve around five common themes, i.e., politics, economics, social, environment and infrastructure as shown in Table 3.

Table 3 Five Common Themes of EIU, Mercer and Monocle's Indicators

No	Dimension	EIU	Mercer	Monocle
1	Politics	-stability	-political stability -crime -law enforcement	-international connectivity
2	Economics	No specific mention	-currency exchange -banking services	-business condition
3	Social	-culture -education	-media availability -limitation on personal freedom	-medical care -tolerance
4	Environment	-environment	-climate -record on natural disaster	-environmental issues & access to nature -climate/sunshine
5	Infrastructure	-healthcare -amenities & facilities	-electricity -water -public transport	-public transport -urban design -quality of architecture

The EIU's Global Liveability Index emphasized on five broad themes, i.e., Stability, Healthcare, Culture and Environment, Education and Infrastructure. Economic indicators, Recreation and Housing do not constitute as important factors because these people are already well paid and could afford recreation fees and are most probably given housing allowances or paid for accommodation by their respective companies. Mercer emphasizes on Recreation, and Monocle stresses on climate, quality of architecture and urban design.

There seems to be a non-emphasis on religious and spiritual values in all the themes and sub-indicators. However, Monocle does emphasize on "tolerance" and EIU has a sub-indicator under Culture and Environment,

on what they term as “social or religious restrictions”. On the same note Mercer has a sub-indicator as “limitations on personal freedom” and “media and censorship” under its Socio-Cultural category (refer to Table 1). Hence it has been observed that the most striking indicator found absent in all the liveability indicators by the world organizations is the specific religious indicator. This is supported by another study done by Ahmad Basri and Aaesheh (2015) and Pew Research¹⁰ when it found that religion is generally less central to the lives of Europeans. This is substantiated that in France, Britain, and Spain — majority say that religion is only somewhat important in their lives likewise the economically advanced nations of Japan, South Korea and Australia (see Figure 1 below).

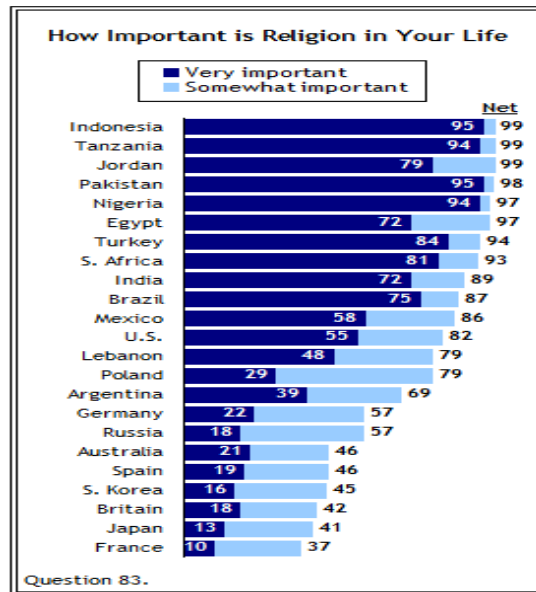


Figure 1 Pew’s Study on the Importance of Religion

In short, the above three world organizations’ indicators on the quality of life are similar in terms of their main objective that is to enable multinational companies and other employers to compensate employees fairly when placing them on international assignments. They also share five common themes of indicators (see Table 3) and they contain minimal or indirect emphasis on the religious factor. However, despite their commonalities, the results of the top ten most liveable cities indicate notable differences. Table 4 presents the analysis of those top ten cities.

Noticeably the results in terms of rankings of cities are quite different. The top three countries with the highest number of cities most liveable are Germany (5 cities), followed by Australia (4 cities) and Japan and Canada (3 cities each). However, the same cities though they may appear under different organizations’ ranking but their position are not the same, for example Munich, Germany is at number 4 under Mercer but falls at number 5 in the Monocle’s list. Likewise Melbourne, Australia, is number 1 under EIU but is at number 6 under Monocle. Surprisingly Munich and Melbourne are not listed as among the top ten cities under the EIU and Mercer respectively. The only city that appears in all three organizations’ ranking is Vienna, Austria where the result is quite consistent when the city is rated as number 2 under EIU, number 1 under Mercer and number 3 under

¹⁰ The Pew Research Center is a nonpartisan American “fact tank” which is based in Washington, D.C. It provides information on social issues, public opinion, and demographic trends shaping the United States and the world. It also conducts public opinion polling, demographic research, media content analysis, and other empirical social science research. It is a subsidiary of The Pew Charitable Trusts.

Monocle. The three cities in Japan only managed to be listed under Monocle and not under EIU and Mercer as the top ten cities unlike the 3 cities in Canada. They are recognized under EIU and Mercer but not under Monocle. Another salient point is about Auckland, New Zealand. While it managed to get number 3 under Mercer but it posits at number 8 under EIU and not listed under Monocle. Similarly for Copenhagen, it is at number 4 under Monocle but number 9 under Mercer.

Table 4 Top Ten Cities 2016 according to EIU, Mercer and Monocle

No	Country, cities	Ranking		
		EIU	Mercer	Monocle
1	Germany			
	i. Hamburg	10	*	*
	ii. Munich	*	4	5
	iii. Dusseldorf	*	6	*
	iv. Frankfurt	*	7	*
	v. Berlin	*	*	2
2	Australia			
	i. Melbourne	1	*	6
	ii. Adelaide	5	*	*
	iii. Perth	7	*	*
	iv. Sydney	*	10	8
3	Japan			
	i. Tokyo	*	*	1
	ii. Fukuoka	*	*	7
	iii. Kyoto	*	*	9
4	Canada			
	i. Vancouver	3	5	*
	ii. Toronto	4	*	*
	iii. Calgary	6	*	*
5	Switzerland			
	i. Zurich	*	2	*
	ii. Geneva	*	8	*
6	Austria			
	i. Vienna	2	1	3
7	New Zealand			
	i. Auckland	8	3	*
8	Denmark			
	i. Copenhagen	*	9	4
9	Sweden			
	i. Stockholm	*	*	10
10	Finland			
	i. Helsinki	9	*	*

Note: *city is not enlisted within the ten top cities in respective ranking organizations for 2016.

The EIU's and Mercer's list are quite similar in the sense that the same cities are appearing (see Table 2) except that their positions are not the same (see Table 4). There is some slight positioning for the last five cities though. On the other hand, the top ten of the Monocle's Quality of Life rankings differ from the other two rankings. For the first time Tokyo, an Asian city is crowned as the top city in 2015 and 2016 with the highest quality of life. The rest are still Australian and European cities like those of the EIU's and Mercer's.

The analysis on the indicators and the result of city ranking based on its specific indicators reveals their commonalities and differences as well as the evidence that the indicators, interpretation and scope, organizational aim and objectives, methodology of the survey conducted posed different result on the cities ranking.

8. Conclusion

This article had explored the literatures regarding quality of life and liveable cities indicators from the world organizations studies. The world indicators may be grouped into five main dimensions or themes namely politics, economy, social, environment and infrastructure. The world indicators are not targeting the quality of life for residents or city populations per se but for the expatriates, businessmen, investors, corporations and to a lesser extent for visitors and tourists. However, they are useful for town planners and city managers so that investments could be made to improve on the ranking of their cities to be at par with those of world cities. The commonalities and differences among those worldwide indicators have been examined and one outstanding indicator that is missing in the worldwide organizations' indicators is the Religious factor. Monocle though does mention something to do with the religious factor but this is more of its tolerance to non-religious behaviours of visitors and guests staying in the respective cities. It is therefore proposed that the Religious factor to be a new dimension to the existing indicators. Overall the study concentrates on the indicators themselves and how their commonalities and differences gave impact to the cities ranking under studied. Along the way the study helps to reiterate that in fact there are no 'one-size-fit-all' indicators as far as liveability and quality of life of cities are concerned.

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