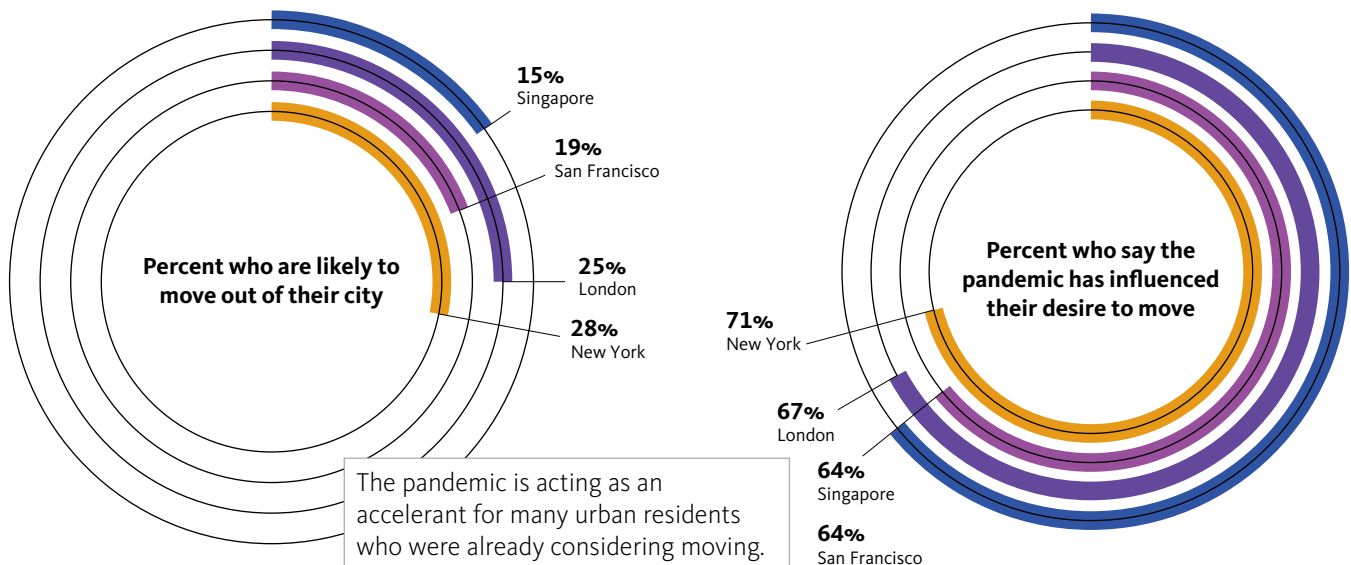


# Cities Amid COVID-19

## The Shifting Equation of Urban Life

Gensler  
CITY PULSE  
SURVEY 2020

**The pandemic is straining people's relationships with their cities. Roughly two-thirds of urban residents who want to relocate say that the public health crisis has made them more likely to move.**



**We conducted two surveys with residents of New York, San Francisco, London, and Singapore to understand their unfolding experiences of the COVID-19 pandemic.** At the time of the first survey's launch in **May**, these urban centers were grappling with the first few weeks of lockdown. New York was an epicenter of viral spread. San Francisco was one of the first cities in the United States to shut down, while Greater London had imposed lockdown restrictions more slowly. Singapore had just entered lockdown, and—having navigated the 2003 SARS outbreak—had previous experience with a similar public health crisis. The second survey, conducted in **August**, returned to those same cities as lockdown restrictions eased and much of the world had taken cautious steps to reopen businesses, workplaces, and schools.

As the pandemic continues, urban residents are navigating conflicts related to social unrest, racial justice, and climate change. Furthermore, stark disparities in experience for minority communities are becoming increasingly clear. This briefing takes a closer look at the impact the public health crisis has had on city dwellers. Our data reveals how people's experiences are changing over time and what cities might do to become more resilient and responsive to evolving needs.

**METHODS** This anonymous, panel-based survey of 2,000 urbanites was conducted online twice—from April 30, 2020 to May 15, 2020, and again from August 7, 2020 to August 20, 2020. Respondents were required to be residents of the metropolitan areas of New York City, San Francisco, Greater London, or Singapore and to have lived there prior to the COVID-19 pandemic. Participants are demographically diverse by gender, age, income, and education level.

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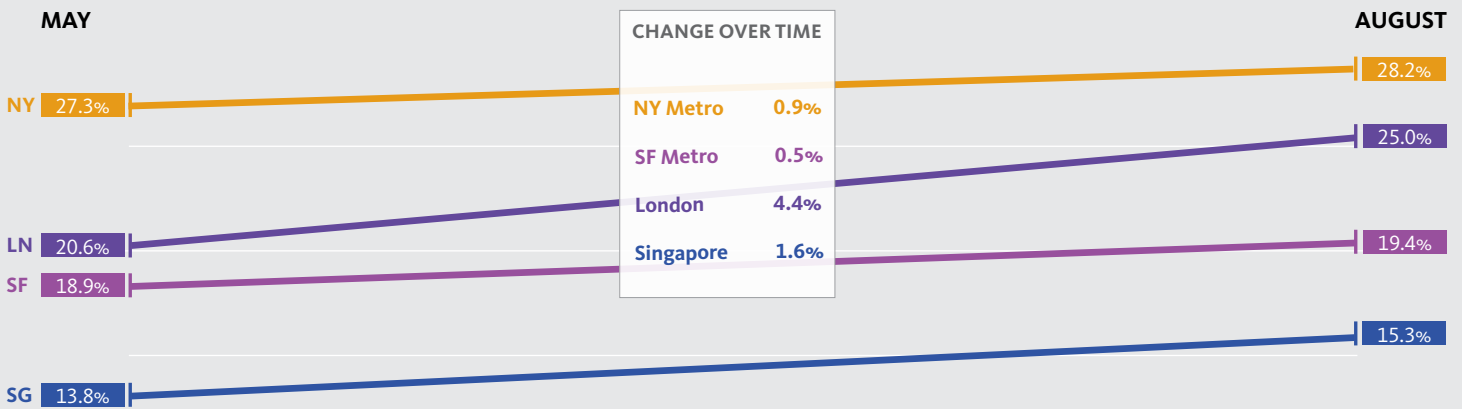
**As the pandemic stretches on, more people want to move out of their cities. They're also less satisfied with their living situations.**

The number of people who want to move out of their cities increased from May to August, especially in London. This finding parallels the growing dissatisfaction that respondents feel about where they live. New Yorkers reported the most stable levels of satisfaction from May to August, while dissatisfaction grew in the other cities we surveyed by at least

5%. However, the pandemic may not be the sole cause of the growing discontent. Three out of four San Franciscans thought about moving even before the public health crisis. Additionally, 80% of the Gen X respondents we surveyed also said that they considered moving before the pandemic.

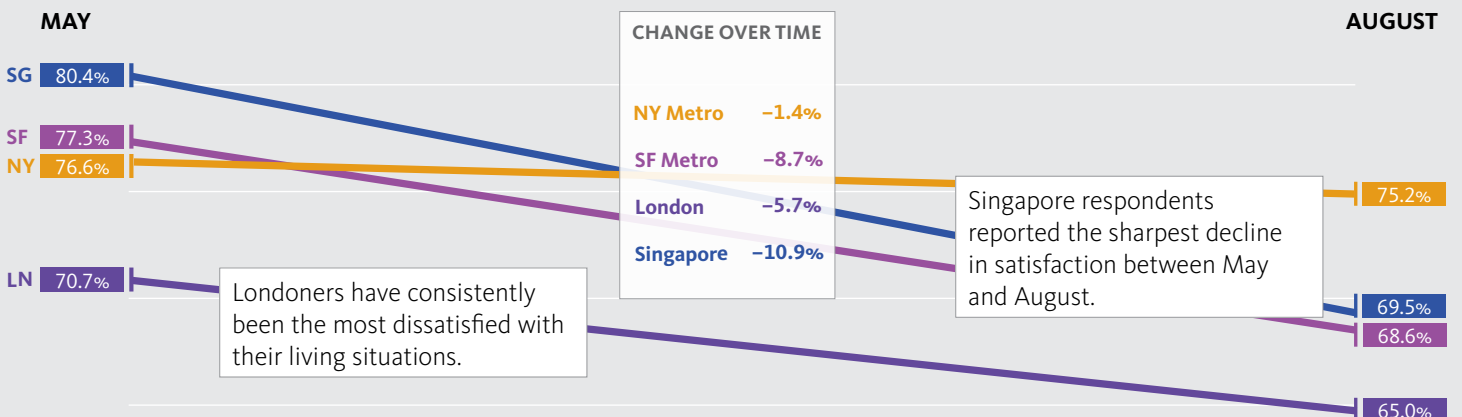
### New Yorkers are the most likely to want to leave the city, while Londoners' desires to relocate increased by the largest percentage.

Percentage of respondents who want to move out of each city.



### People's satisfaction with their living situation declined in each city we surveyed between May and August.

Percent of respondents who are satisfied with their living situation.



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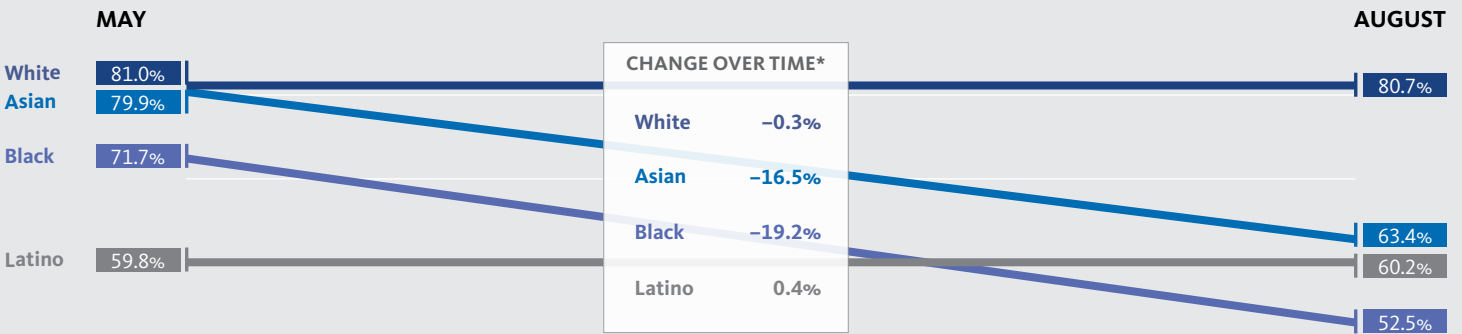
**As the pandemic progressed, Black, Asian, and Millennial respondents experienced significant declines in living satisfaction.**

White respondents reported both the highest and steadiest levels of satisfaction, while Black respondents' satisfaction declined by a staggering 19%. Similarly, Asian respondents reported nearly a 17% dip in satisfaction. When examining the data by generation, we found that younger residents report more

dissatisfaction than older cohorts. Millennials' satisfaction with their living situation dropped by 11% between May and August. They were also the most likely to live with young children, the strongest indicator of lower levels of satisfaction.

### Asian and Black respondents experienced the steepest decline in living satisfaction.

Percentage breakdown of living satisfaction, by race.

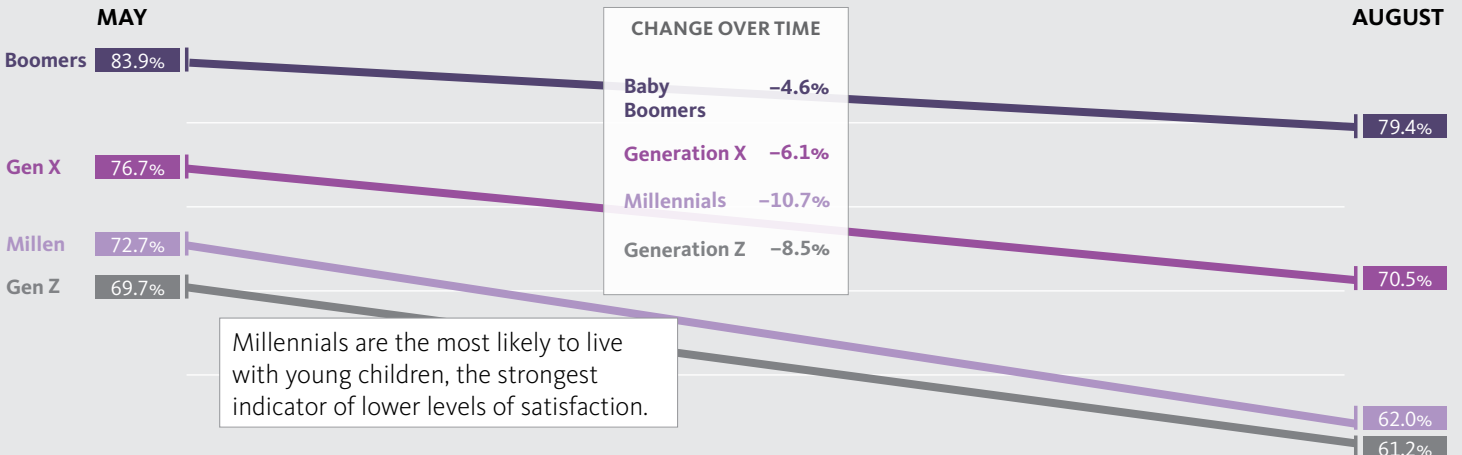


Also between May and August, fewer Black and Asian respondents reported that their neighborhoods were safe and peaceful.

\*Race data represents respondents from the United States.

### Millennials' satisfaction with their living situations dropped more than any other generation.

Percentage breakdown of living situation satisfaction, by generation.



Millennials are the most likely to live with young children, the strongest indicator of lower levels of satisfaction.

# Cities Amid COVID-19

## The Shifting Equation of Urban Life

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**Although many people—particularly Millennials—are struggling financially, urban residents feel that public health should be prioritized ahead of economic recovery.**

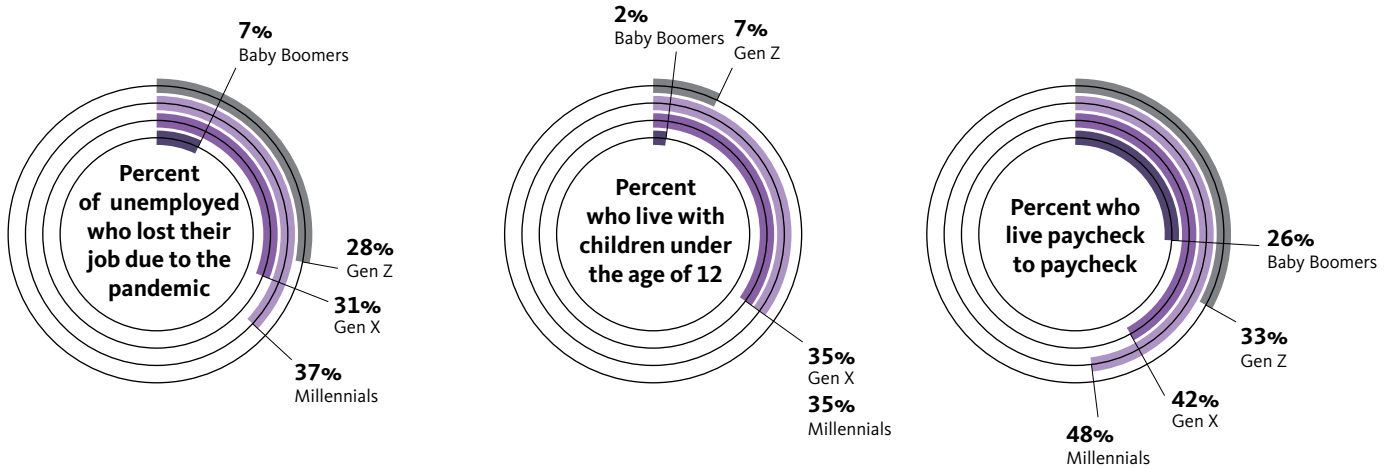
When asked if their government should prioritize mitigating the financial impacts of the pandemic over its public health concerns, residents rated economic recovery far lower in August. This was especially true in New York and San Francisco, where the perceived importance of the pandemic's financial impacts dropped by 10% and 17% respectively.

This is a striking decline—particularly since at least one-quarter of respondents are living paycheck to paycheck. Of all generations, Millennials seem to be feeling the most financial strain. They are the cohort that is most likely to have lost their jobs, support young children, and live paycheck to paycheck.

**Millennials are the most likely to have lost their jobs, support young children in their households, and live paycheck to paycheck.**

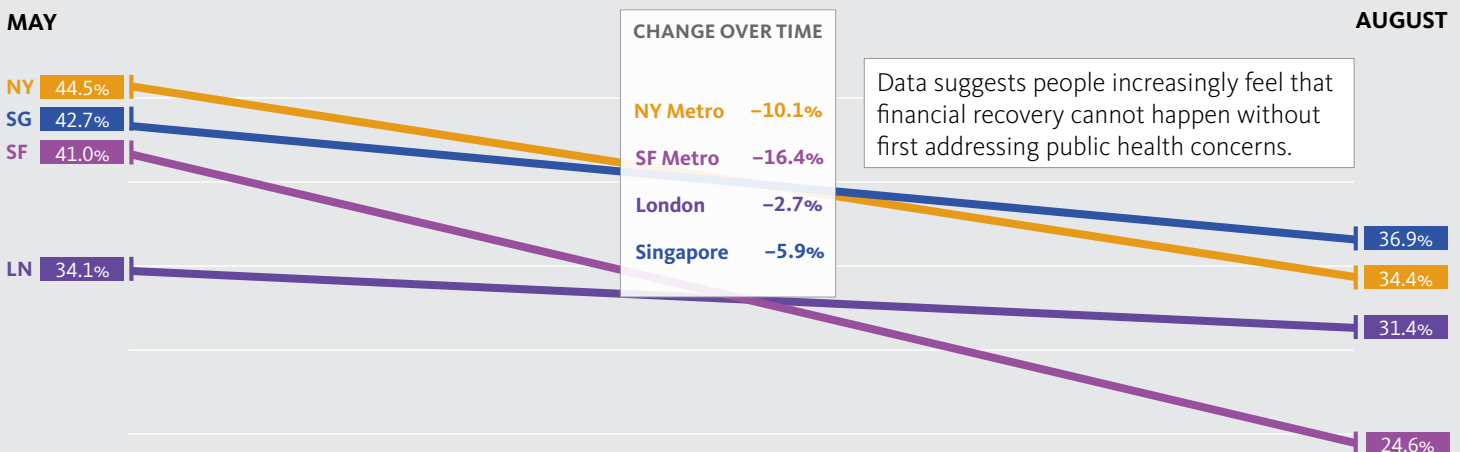
Data from August 2020.

51% of households that include young kids are living paycheck to paycheck.



**Fewer people feel that the government should prioritize financial recovery over public health.**

Percentage of respondents who feel that the government should prioritize economic recovery.



# Cities Amid COVID-19

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**Satisfaction has declined in all cities—younger generations and people who live with young children are the most likely to move.**

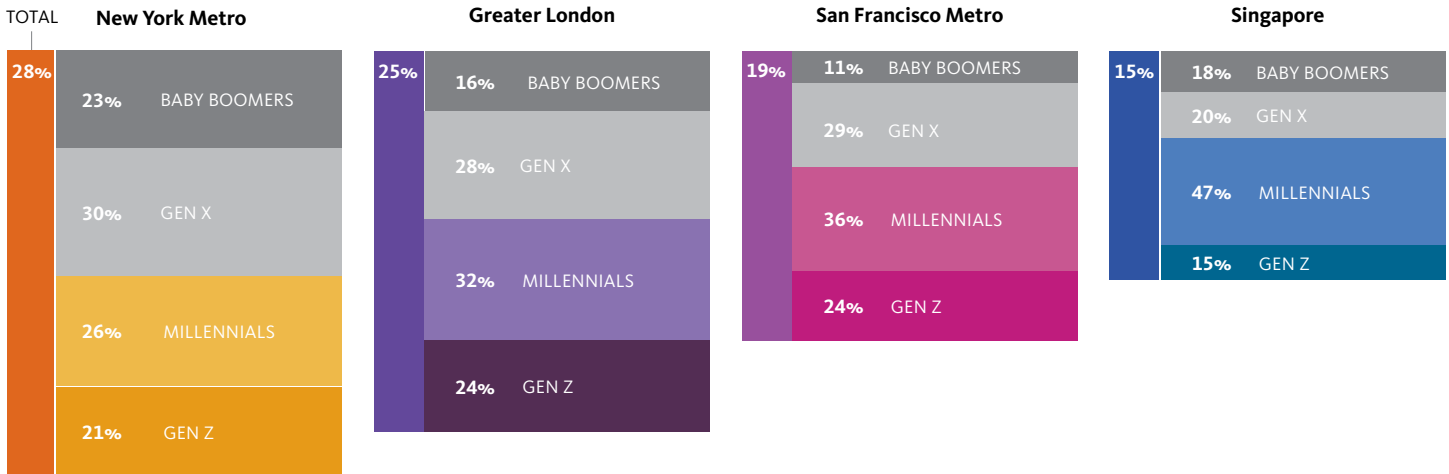
In most cities, Gen X, Millennial, and Gen Z residents are most likely to consider moving out of their cities as a result of COVID-19, while Baby Boomers want to stay where they are. Singapore respondents are the least likely to report wanting to move, but nearly half

who want to leave are Millennials. People who live with children are also struggling—half of people in New York who live with children under 12 are ready to make a move. New Yorkers are also the most likely to report wanting to leave their city.

### With the exception of New York, Millennials were the largest cohort to want to leave their city.

Percentage breakdown by generation of those looking to move out of each city, as of August 2020.

Nearly half of the people who want to move out of Singapore are Millennials.



New Yorkers with young children are 5.5x more likely to move than New Yorkers who live alone.

### People who live with young children are the most likely to want to move compared to those who do not live with young children—particularly in NYC.

Percent of respondents who want to move, by household type, as of August 2020.



# Cities Amid COVID-19

## The Shifting Equation of Urban Life

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**People don't want to abandon urban life entirely—over one-third of respondents want to move to a different city.**

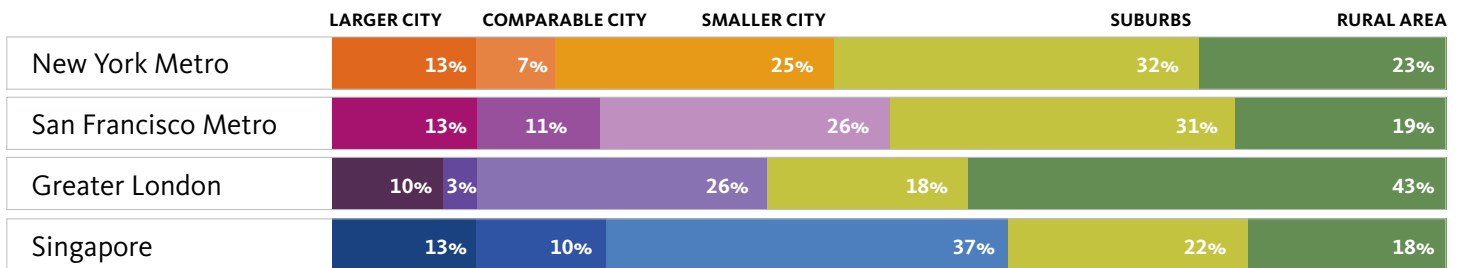
There likely won't be a sudden mass exodus out of cities. Most respondents looking to move project a relocation timeline of over a year. Nearly half of respondents in New York and San Francisco want to move to cities of some kind, while 60% of Singapore respondents plan to move to other urban areas. Londoners are the only exception—

more than one-third will look to move to rural areas, and half have no intentions of returning to the city once the pandemic ends. When asked if urban residents contemplated moving before the pandemic hit, over half of respondents in all cities had already considered it.

### Nearly half of respondents want to stay in an urban environment.

Preferred relocation destinations, by city, as of August 2020.

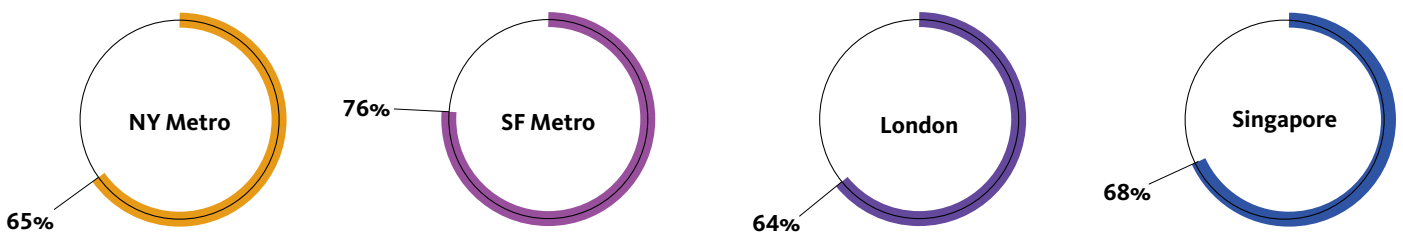
60% of Singapore respondents want to move to a different city.



### More than two-thirds of people who want to move were already thinking of moving before the pandemic.

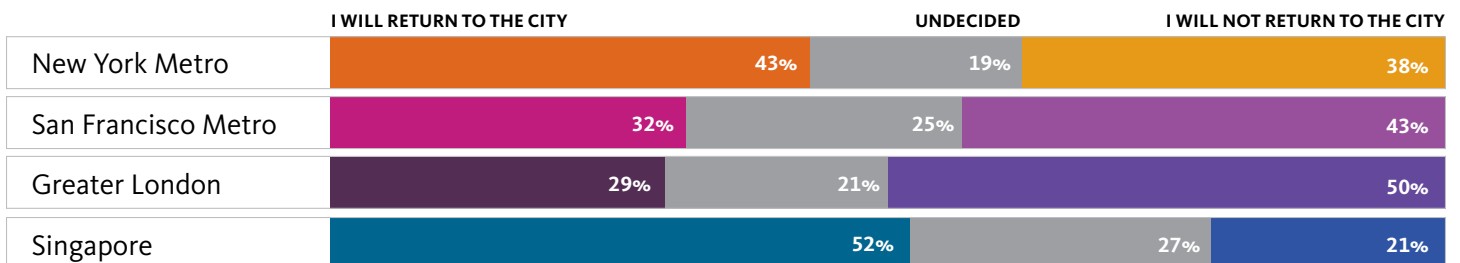
Percentage of people who contemplated moving before the pandemic, by those likely to leave their city.

3 out of 4 San Francisco respondents have thought about leaving their city before the pandemic.



### New Yorkers and Singapore respondents are mostly likely to want to return to the city once the pandemic ends.

Percentage breakdown of those who will and will not return to their city, as of August 2020.



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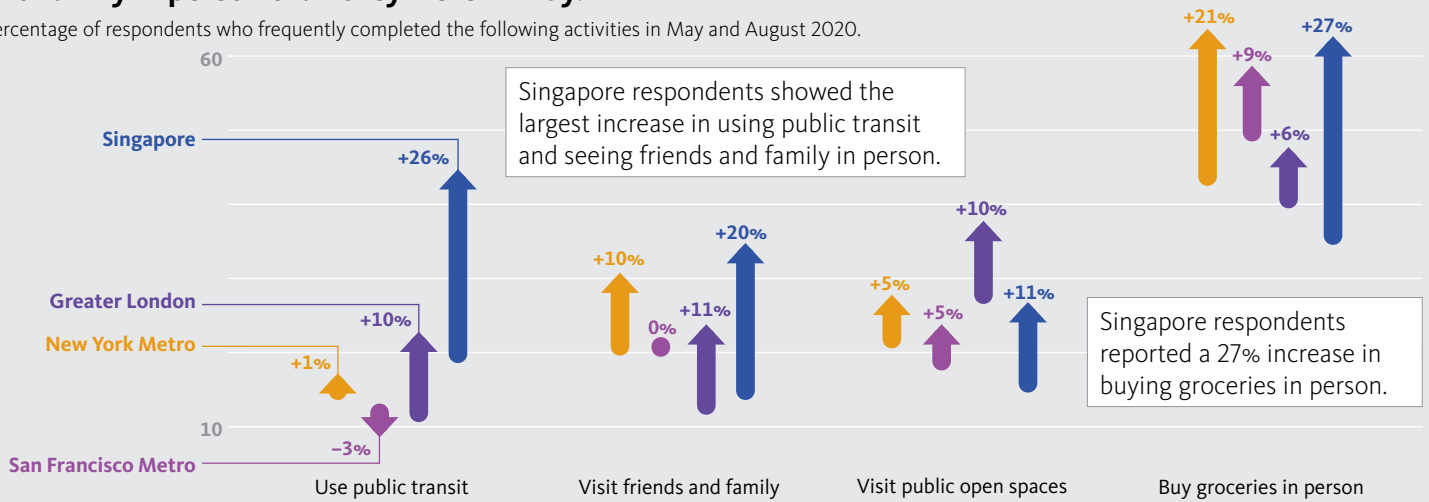
**A new normal is emerging: people continue to increase virtual activities, but they're also resuming in-person behaviors when digital alternatives fall flat.**

The majority of urban residents believe that the pandemic will last six months or longer—but that isn't keeping them inside their homes. Between May and August, the number of urban residents who believe that the pandemic will last until next year or longer grew dramatically. However, as the weather got warmer and economies began to reopen, people started to leave their homes

more. Instances of using public transit, seeing friends and family in person, visiting public open spaces, and buying groceries in person increased in the majority of cities. However, people still enjoy the convenience of doing things virtually—online shopping, virtual doctor visits, and online banking increased in at least 3 out of the 4 cities from May to August.

### In August, urban residents were more likely to visit friends and family in person than they were in May.

Percentage of respondents who frequently completed the following activities in May and August 2020.



### Virtual activities have grown as the pandemic continues, except grocery shopping.

Percentage of respondents who frequently completed the following activities in May and August 2020.



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**Addressing peoples' perceptions of safety, and what activities they are most comfortable resuming as a result, will make the difference in how fast cities are able to recover.**

The behaviors that urban residents planned to avoid showed very little variation between May and August. In 3 out of the 4 cities we surveyed, avoiding large public gatherings such as concerts, theater performances, and conventions was the largest area of concern.

Residents also report hesitation about traveling via airplane. Finally, in all cities except Singapore, people don't feel comfortable using mass transit as restrictions lift.

### As restrictions lift, the activities the people are most comfortable resuming vary by city.

Ranking of behaviors residents are most comfortable resuming, as of August 2020.

People in all 4 cities are most comfortable returning to work and buying groceries in person.

Rank	New York Metro Area	San Francisco Metro Area	Greater London	Singapore
1	Grocery shopping	Grocery shopping	Grocery shopping	Grocery shopping
2	Returning to work/school	Returning to work/school	Returning to work/school	Returning to work/school
3	Shopping in stores/malls	Shopping in stores/malls	Staying in hotels or vacation rentals	Shopping in stores/malls
4	Using shared bikes and scooters	Using shared bikes and scooters	Dining out	Using rideshare services
5	Dining out	Staying in hotels or vacation rentals	Shopping in stores/malls	Using mass transit
6	Staying in hotels or vacation rentals	Dining out	Using shared bikes and scooters	Dining out
7	Using rideshare services	Using rideshare services	Using rideshare services	Using shared bikes and scooters
8	Going to the gym/pool	Going to the gym/pool	Using mass transit	Staying in hotels or vacation rentals
9	Flying on an airplane	Flying on an airplane	Going to the gym/pool	Going to the gym/pool
10	Using mass transit	Attending large gatherings	Flying on an airplane	Flying on an airplane
11	Attending large gatherings	Using mass transit	Attending large gatherings	Attending large gatherings

MOST COMFORTABLE

LEAST COMFORTABLE

Cities need to make their residents feel safe on urban mass transit—public transportation is a key area of concern in 3 out of 4 cities.