CITY PULSE SURVEY
SPRING 2022

Gensler RESEARCH INSTITUTE

Two out of three urban residents believe we should completely rethink city life for a post-pandemic world.

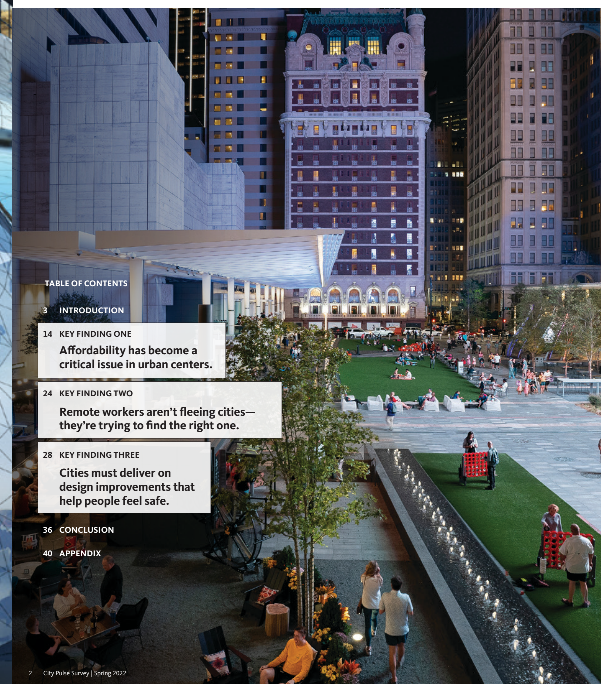


TABLE OF CONTENTS

After two years of uncertainty, where do cities stand today and what does the future hold?

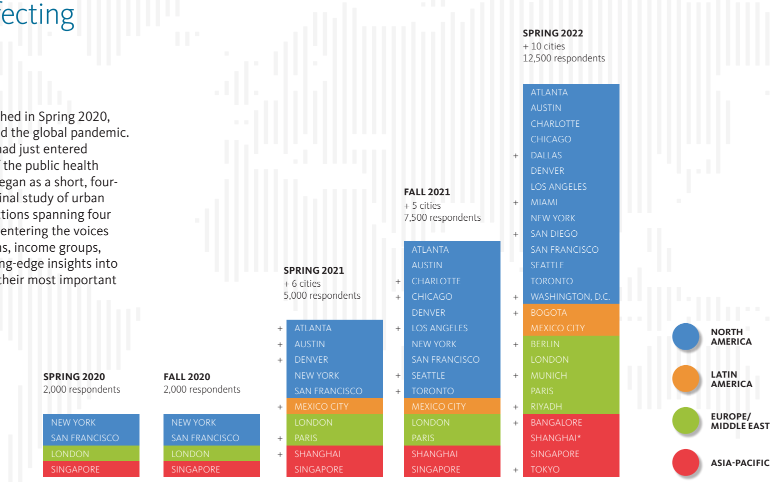
At the time of this publication, many urban centers around the world are relaxing the pandemic-related restrictions that have dictated city life for the past two years. People are going back to their schools and workplaces, gathering in bars and restaurants, and attending in-person events and celebrations. In some ways, life is resuming a state of normalcy—but in many ways, our lives have fundamentally shifted.

Cities today are at a crossroads: most urban residents believe that their city provides a great experience, but they also think that it's time to completely rethink city life in light of the unprecedented experience of the last two years. To dig into the question of what the future of cities holds, we surveyed 12,500 residents of 25 cities around the world in January and February of 2022. Our goal is to understand how they feel about their cities today and what improvements could build a better future. Our survey focuses on three areas in which the pandemic has triggered seismic shifts at personal and societal levels: affordability, work, and safety.

We begin this report by outlining what urban residents think about the livability, experiences, and futures of their cities. We then offer a glimpse into how people feel about their financial situations and city-related expenses, as well as the trade-offs and sacrifices they've made (or are willing to make) to stay financially solvent. Next, we explore the impact that hybrid work has on city perception and move intentions. We conclude this report with findings related to both personal and public safety, outlining how cities can help residents feel safer as we continue to navigate uncertain times.

Our growing global pulse survey gathers data about pressing issues affecting urban centers.

Gensler's City Pulse Survey first launched in Spring 2020, weeks after the world officially entered the global pandemic. We looked at four cities, all of which had just entered lockdown, to understand the effect of the public health crisis on urban environments. What began as a short, four-city study has expanded to a longitudinal study of urban life, comprised of biannual data collections spanning four continents and 25 urban centers. By centering the voices of people from a variety of generations, income groups, and regions, we hope to provide cutting-edge insights into cities around the world directly from their most important stakeholders: their residents.



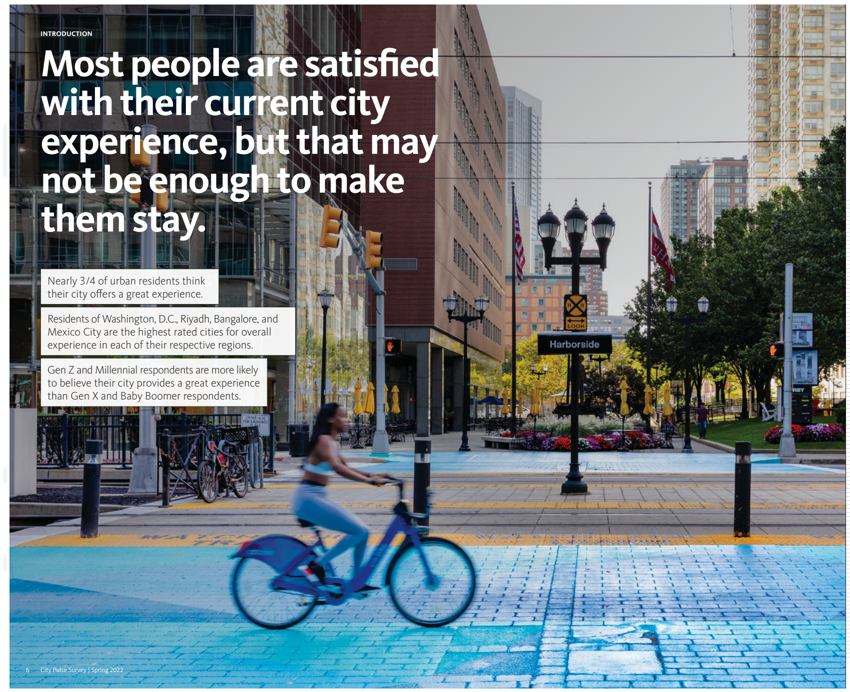
*This data was collected in January/February 2022, prior to the lockdowns in China from March to May. As responses from Chinese residents did not reflect their reactions to/experiences of the recent lockdowns, we have removed their city-specific data from this report.

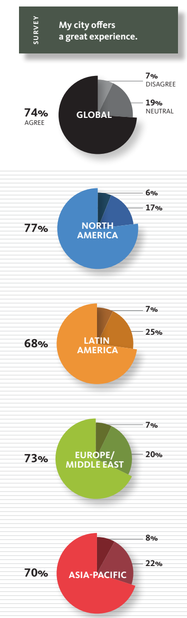
Most people are satisfied with their current city experience, but that may not be enough to make them stay.

Nearly 3/4 of urban residents think their city offers a great experience.

Residents of Washington, D.C., Riyadh, Bangalore, and Mexico City are the highest rated cities for overall experience in each of their respective regions.

Gen Z and Millennial respondents are more likely to believe their city provides a great experience than Gen X and Baby Boomer respondents.





INTRODUCTION

In 10 out of the 25 cities we surveyed, there are more residents who would not recommend their cities as a great place to live than those who would.

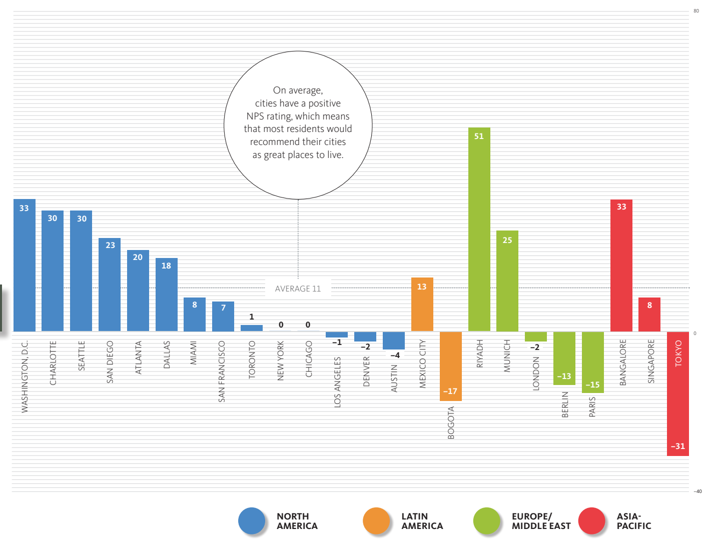
On average, the 25 cities we studied have a positive Net Promoter Score (NPS), which means that more residents would recommend their cities as great places to live than would not.

Regionally, respondents in Asia-Pacific are most likely to recommend their cities as great places to live; respondents in Latin America are least likely.

Cities like Austin, Berlin, and Denver have a negative NPS, despite at least 70% of residents in those locations agreeing that their city provides a great experience.

SURVEY

How likely are you to recommend your city as a great place to live? (Net Promoter Score*)



*Net Promoter Score (NPS) is a widely used market research metric to gauge customer loyalty and satisfaction by asking respondents to rate the likelihood that they would recommend a company, product, or service to a friend or colleague. NPS = Promoters – Detractors

INTRODUCTION

Move intentions are on the rise, particularly in U.S. cities.

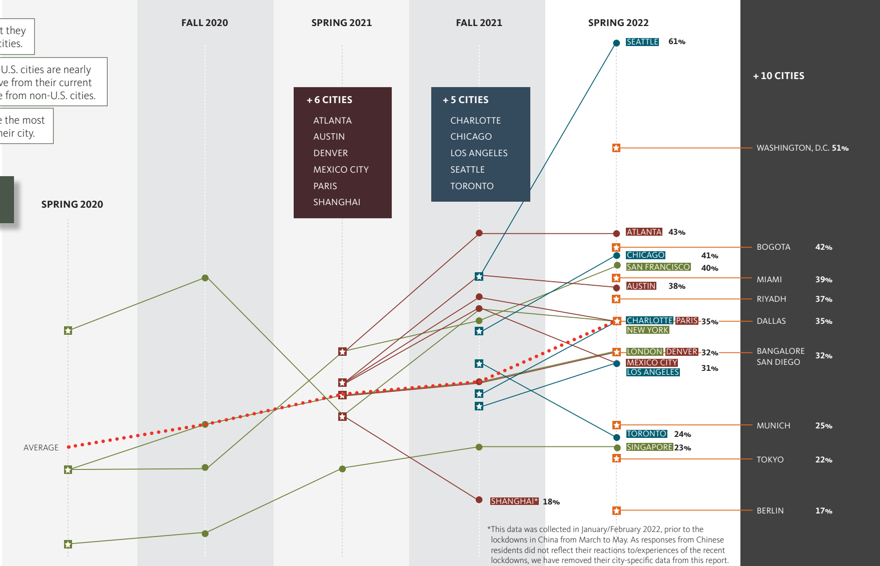
35% of urban residents say that they are likely to move out of their cities.

On average, respondents from U.S. cities are nearly 1.5x more likely to want to move from their current cities than the average of those from non-U.S. cities.

At 61%, residents of Seattle are the most likely to want to move out of their city.

SURVEY

I am likely to move out of my current city.



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INTRODUCTION

Three factors positively influence overall city experience: financial stability, ability to work remotely, and feelings of personal safety.

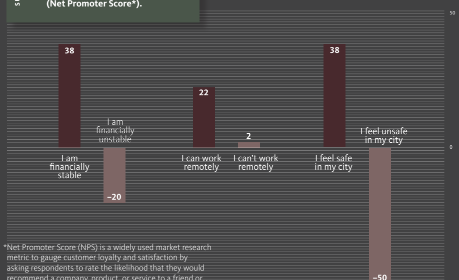
People who feel financially stable are 2.5x more likely to feel optimistic about their city's future.

Less than half of urban residents who cannot work remotely are optimistic about their city's future.

People who feel safe in their cities are nearly 2x more likely to feel that their city provides a great experience.

SURVEY

I would recommend my city as great place to live (Net Promoter Score*).



*Net Promoter Score (NPS) is a widely used market research metric to gauge customer loyalty and satisfaction by asking respondents to rate the likelihood that they would recommend a company, product, or service to a friend or colleague. NPS = Promoters – Detractors

SURVEY

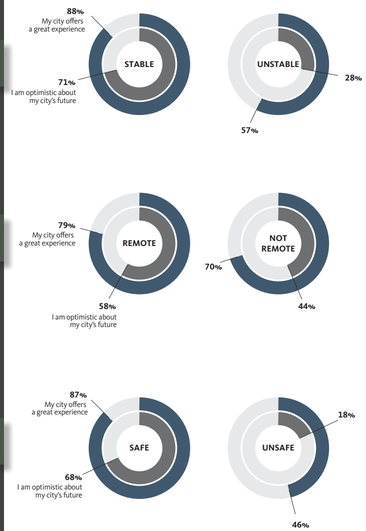
How do you feel about your financial situation?

SURVEY

Are you able to work remotely / from home?

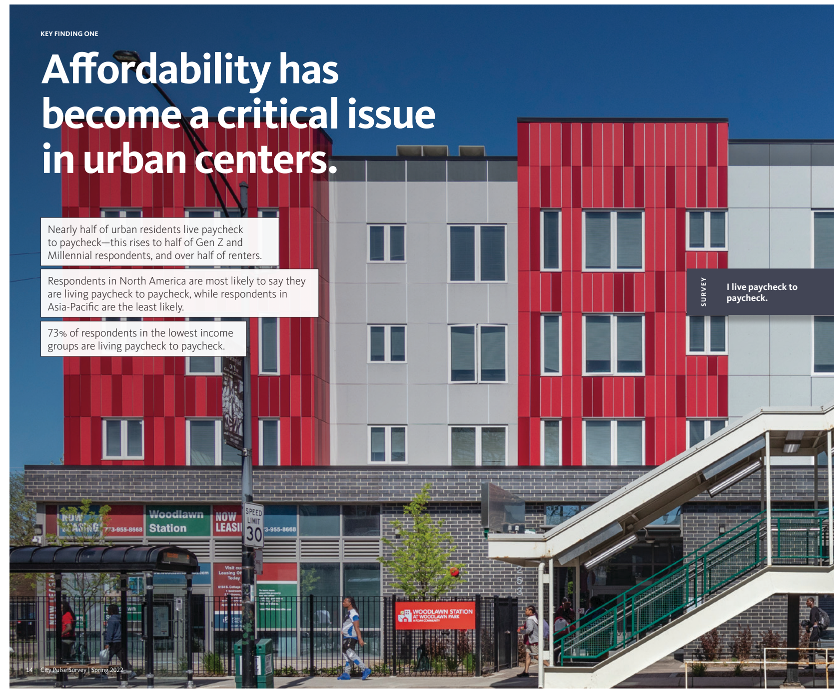
SURVEY

How safe do you feel in your city?



KEY FINDING ONE

Affordability has become a critical issue in urban centers.



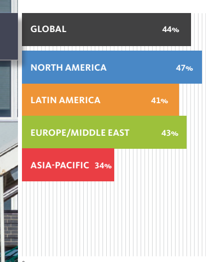
Nearly half of urban residents live paycheck to paycheck—this rises to half of Gen Z and Millennial respondents, and over half of renters.

Respondents in North America are most likely to say they are living paycheck to paycheck, while respondents in Asia-Pacific are the least likely.

73% of respondents in the lowest income groups are living paycheck to paycheck.

SURVEY

I live paycheck to paycheck.



KEY FINDING ONE

Over one-third of global residents have experienced wage decreases since the start of the pandemic.

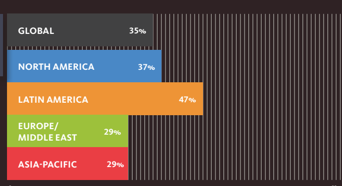
Within their respective regions, residents of Seattle, Riyadh, Bangalore, and Mexico City were the most likely to say that their wages had decreased.

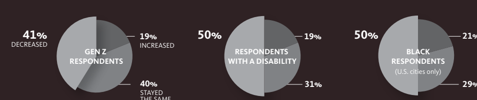
67% of respondents in the lowest income groups reported wage decreases.

Young respondents, Black respondents in the U.S., and people with a disability have been affected the most.

SURVEY

Since the start of the pandemic, my wages have decreased.





KEY FINDING ONE

In the face of rising costs, urban residents are most worried about saving for home ownership and retirement.

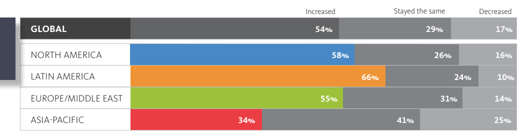
Roughly half of respondents around the world feel the costs of living and housing have increased.

Residents of Denver, Paris, Singapore, and Bogata are most likely to agree that the cost of living has increased within their respective regions.

71% of respondents in the lowest-income groups are worried about saving for retirement and unforeseen emergencies.

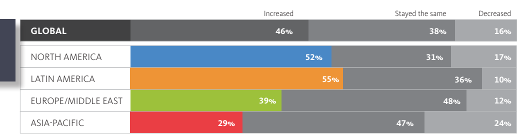
SURVEY

Compared to pre-pandemic times, cost of living has...



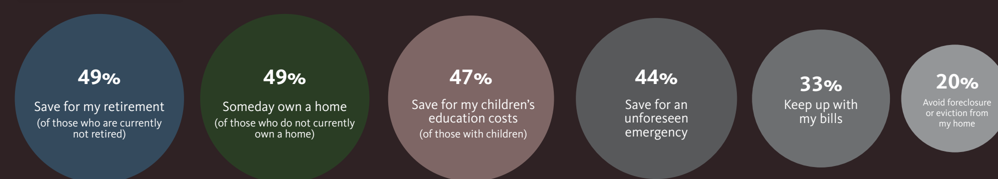
SURVEY

Compared to pre-pandemic times, housing costs have...



SURVEY

I am worried about my ability to do the following:



KEY FINDING ONE

Most people haven't moved to save money, but they are traveling less, forgoing savings, and taking on more work.

Half of urban residents say that they are traveling less in order to improve their financial situation.

Roughly one in four urban residents say that in order to improve their finances they are not saving at all.

Residents of Washington, D.C., Riyadh, Bangalore, and Bogota are the most likely to have moved to a cheaper location within their respective regions to improve their finances.

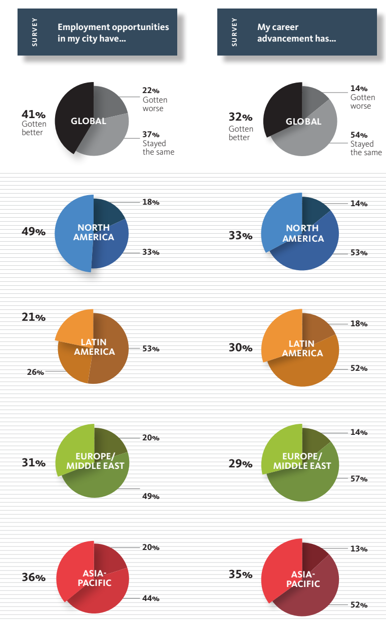
KEY FINDING ONE

Employment opportunities have improved in cities around the world since the start of the pandemic, but opportunities for career advancement still lag behind.

41% of urban residents say that employment opportunities in their city have improved.

Less than one-third of respondents think that their career advancement has improved since the pandemic.

30% of respondents in our lowest income group say that their career advancement has gotten worse.



KEY FINDING TWO

Remote workers aren't fleeing cities—they're trying to find the right one.

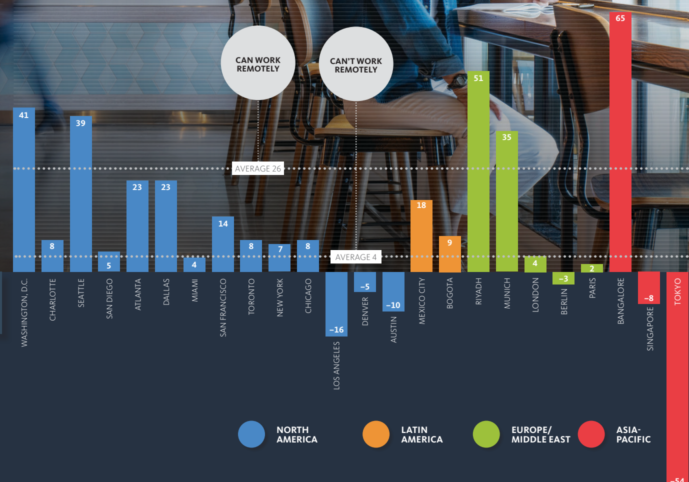
People who can work remotely are significantly more likely to recommend their city as a great place to work, with a NPS score 22 points higher.

Respondents from Bangalore, the city with the highest work-related NPS, are also the most likely to be able to work remotely at least part of the time.

Tokyo, Berlin, and Denver, three cities with a negative work-related NPS score, are also the three cities where respondents are least likely to be able to work remotely.

SURVEY

How likely are you to recommend your city as a great place to work?



KEY FINDING TWO

The ability to work remotely is making many urban residents think about moving—but that doesn't mean they want to abandon city life.

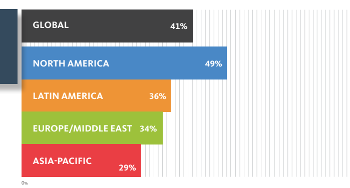
The ability to work remotely has made many urban residents think about moving out of their cities, particularly in North America.

Cities are a more popular move destination for people who can work remotely than people who cannot.

Nearly half of Gen Z and Millennial respondents say that the ability to work remotely has made them think about moving out of their city.

SURVEY

The ability to work remotely has made me consider moving out of my city.



SURVEY

Where would you most likely move to?

	A city with a larger population size	A city with a similar population size	A city with a smaller population size	The suburbs	A rural area
Not able to work from home	13%	20%	31%	18%	18%
Work from home some days	22%	19%	39%	12%	8%
Work from home most days	29%	24%	23%	14%	10%
Work from home daily	20%	16%	31%	13%	20%

KEY FINDING THREE

Cities must deliver on design improvements that help people feel safe.

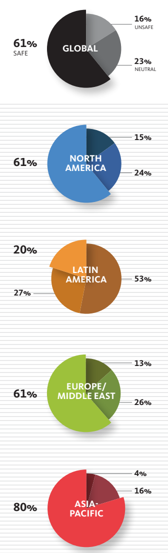
Over one-third of residents do not feel safe in their urban centers, and just 20% of respondents from Latin America feel safe in their cities.

Residents of San Diego, Riyadh, Bangalore, and Mexico City feel safest in their respective regions.

Just 56% of women feel safe in their cities, compared to 67% of men.

SURVEY

How safe do you feel in your city?



KEY FINDING THREE

Many residents don't feel that their city is doing enough to keep them safe.

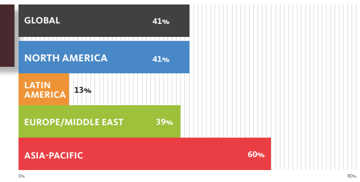
Fewer than half of urban residents think that their city is effectively addressing public safety concerns.

In U.S. cities, Asian respondents were the least likely to feel that their cities were effectively managing safety concerns.

Residents from U.S. cities are more likely than residents from non-U.S. cities to think that most metrics have gotten worse, including crime, homelessness, littering, and vandalism.

SURVEY

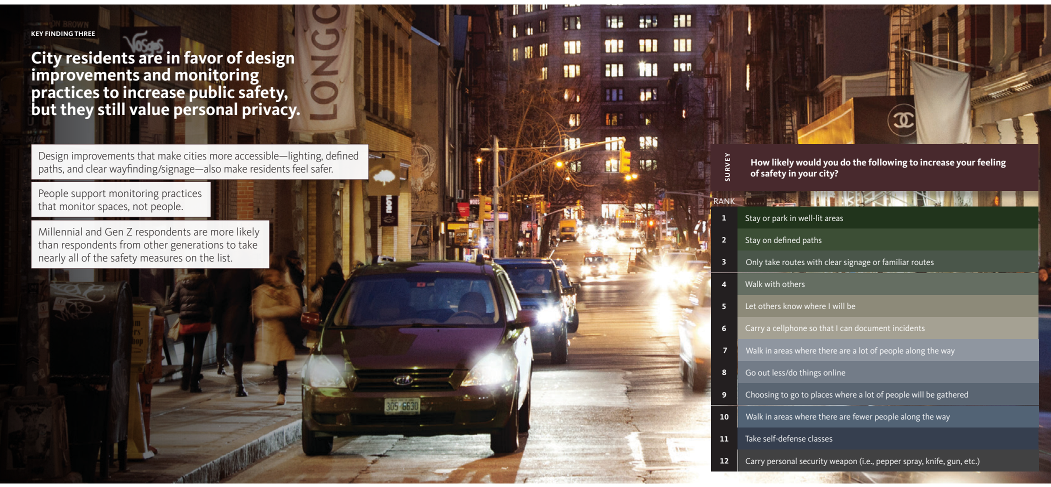
My city is effectively addressing public safety concerns.



SURVEY

Compared to pre-pandemic times, the following in my city have:

	Gotten worse	Stayed the same	Improved
Homelessness	39%	41%	20%
Crime	39%	40%	21%
Vandalism	32%	48%	20%
Littering	31%	46%	23%
Traffic congestion	27%	42%	31%
Run-down buildings or vacant lots	23%	54%	23%
Noise	22%	54%	24%
Sense of community	20%	48%	32%
Air quality	17%	53%	30%



KEY FINDING THREE

City residents are in favor of design improvements and monitoring practices to increase public safety, but they still value personal privacy.

Design improvements that make cities more accessible—lighting, defined paths, and clear wayfinding/signage—also make residents feel safer.

People support monitoring practices that monitor spaces, not people.

Millennial and Gen Z respondents are more likely than respondents from other generations to take nearly all of the safety measures on the list.

SURVEY **How likely would you do the following to increase your feeling of safety in your city?**

RANK	
1	Stay or park in well-lit areas
2	Stay on defined paths
3	Only take routes with clear signage or familiar routes
4	Walk with others
5	Let others know where I will be
6	Carry a cellphone so that I can document incidents
7	Walk in areas where there are a lot of people along the way
8	Go out less/do things online
9	Choosing to go to places where a lot of people will be gathered
10	Walk in areas where there are fewer people along the way
11	Take self-defense classes
12	Carry personal security weapon (i.e., pepper spray, knife, gun, etc.)

SURVEY **Which monitoring practices would you support to increase feelings of safety in your city?**

59% More surveillance on sidewalks and other public spaces

45% Monitoring cars/traffic to adjust traffic flow, or to detect speeding

44% Installing sensors in streets and buildings to detect floods

39% Patrols organized by neighborhood/community associations

20% Monitoring people's locations using facial recognition technology

18% Monitoring people's locations using their cellphones

KEY FINDING THREE

Preferences for public safety practices vary by region; mental health services, city safety apps, and police presence rise to the top.

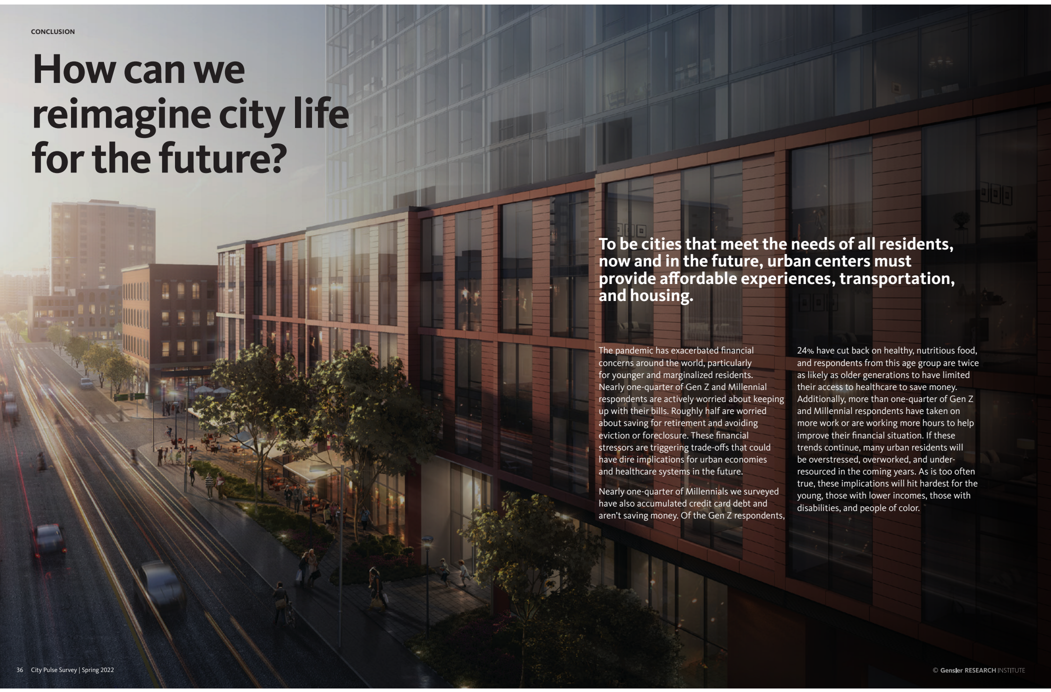
Respondents from EMEA and LATAM favor stronger police presence and penalties.

Residents from North America desire increased community and mental health resources to increase public safety.

Residents from APAC are most supportive of city safety apps.

SURVEY **Which public safety practices would you support in order to increase public safety in your city?**

RANK	NORTH AMERICA	LATIN AMERICA	EUROPE/MIDDLE EAST	ASIA-PACIFIC
1	Increase mental health services	Stronger police presence on streets	Stronger police presence on streets	City safety apps for your phone
2	Increase community resources	Stronger penalties	Stronger police presence on public transit	Stronger penalties
3	City safety apps for your phone	City safety apps for your phone	Stronger penalties	Stronger police presence on streets
4	Stronger police presence on streets	Stronger police presence on public transit	More undercover police officers	Increase mental health services
5	Stronger police presence on public transit	More undercover police officers	City safety apps for your phone	Stronger police presence on public transit
6	Stronger penalties	Increase community resources	Regulating use of scooters, bicycles, etc.	Increase community resources
7	More undercover police officers	Increase mental health services	Increase mental health services	Regulating use of scooters, bicycles, etc.
8	Regulating use of scooters, bicycles, etc.	Regulating use of scooters, bicycles, etc.	Increase community resources	More undercover police officers
9	Less visible police presence	Less visible police presence	Less visible police presence	Less visible police presence



How can we reimagine city life for the future?

To be cities that meet the needs of all residents, now and in the future, urban centers must provide affordable experiences, transportation, and housing.

The pandemic has exacerbated financial concerns around the world, particularly for younger and marginalized residents. Nearly one-quarter of Gen Z and Millennial respondents are actively worried about keeping up with their bills. Roughly half are worried about saving for retirement and avoiding eviction or foreclosure. These financial stressors are triggering trade-offs that could have dire implications for urban economies and healthcare systems in the future.

Nearly one-quarter of Millennials we surveyed have also accumulated credit card debt and aren't saving money. Of the Gen Z respondents, 24% have cut back on healthy, nutritious food, and respondents from this age group are twice as likely as older generations to have limited their access to healthcare to save money. Additionally, more than one-quarter of Gen Z and Millennial respondents have taken on more work or are working more hours to help improve their financial situation. If these trends continue, many urban residents will be overstressed, overworked, and under-resourced in the coming years. As is too often true, these implications will hit hardest for the young, those with lower incomes, those with disabilities, and people of color.

Hybrid work doesn't mean the death of cities—instead, we should see it as the rebirth of our downtowns and neighborhoods.

The ability to work remotely has made almost half of urban residents think about moving out of their current city—but that doesn't mean they're fleeing cities altogether. Our data indicates that most people who want to move, and have the ability to work remotely, are considering relocating to another city, often one with a smaller population size. Respondents looking to move but without the ability to work remotely are, in some cases, actually looking to move to a larger city. Of those who want to move out of their cities, 80% of people who work from home 1-2 days a week and 76% of people who work from home 3-4 days a week are looking to a move to a city of some kind.

What does this mean for cities? If today's growing class of remote or anywhere workers are still seeking urban living, many will be looking for cities that are great places for anywhere work—and that often boils down to cities that provide livable and resilient downtowns, great neighborhoods, and a wide variety of places that support work. From increased infrastructure and building adaptation to new development, cities must prioritize effective and creative ways to support remote working. Cities that can accommodate the hybrid workforce will have a competitive edge in attracting and retaining residents.

Addressing safety must be a focus for the future of our cities—a focus on connectivity and accessibility can help move the mark.

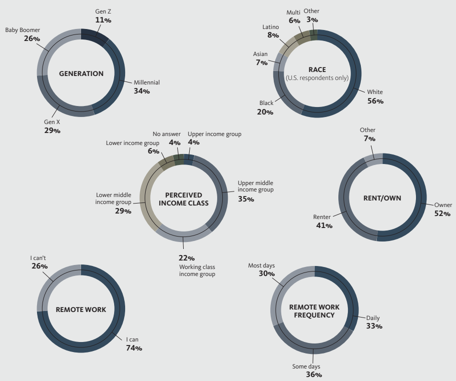
Our data is clear: cities aren't doing enough to make people feel safe. Today's urban residents want smart, responsive environments that keep their streets safe and alert them to impending threats. They want immediate access to city-specific safety resources on their phones. But while protection is important, so is privacy. Urban residents are not supportive of widespread, indiscriminate tracking of people using their cellphones or facial recognition technology. Safety interventions should target spaces, not individuals.

It's also clear that there's no one-size-fits-all approach to safety that can work for every city. Our data shows respondents in North American cities value a holistic approach to safety that emphasizes increased mental health and community resources. The other regions favor stronger penalties and amplifying police presence. But beyond these more policy-based approaches, cities can increase public safety by making the public realm more accessible. Clear signage and wayfinding, well-defined paths, and good lighting all make residents feel safer while making cities more navigable for all residents. With the right approach, cities can help empower their residents to experience their cities without fear.

Methodology

The ***City Pulse Survey*** is an anonymous, panel-based survey of 12,500 urbanites in 25 cities across the world—conducted online from January 25 to February 18, 2022. Respondents were required to be residents within the city proper boundaries. Survey respondents from Los Angeles were required to be residents of the county. Respondents were asked about their experiences, opinions, and preferences regarding living in their city. Participants were demographically diverse by gender, age, income, and education level.

Sample description



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