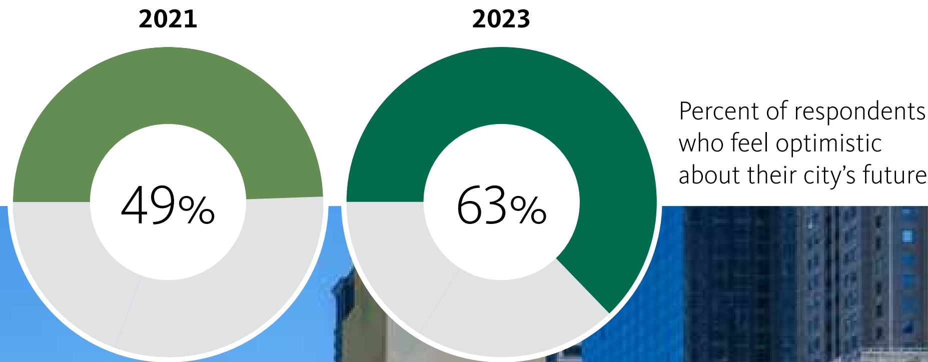
The Return of the City

A 2024 Retrospective of the City Pulse



Gensler RESEARCH INSTITUTE

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Perceptions of urban life have shifted since the height of the pandemic.

Gensler launched its first City Pulse study in 2020 during the first weeks of the global pandemic. In alignment with Gensler's core mission to make a positive impact in the cities and communities in which we work, and the Gensler Research Institute's mandate to conduct investigations and collect data in support of these goals, we felt a keen responsibility to research how the public health crisis and resulting lockdowns would affect and influence urban life. As we continued the research into 2021, and while headlines around the world proclaimed the death of cities, we set out to discover what might keep them alive.

Leveraging these ongoing data collections, we were able to identify the statistical drivers of whether or not a person was planning to stay in their city or relocate. We found that **neighborhood design**—where people feel that their neighborhoods are beautiful, authentic, clean, and pedestrian-friendly—is a positive driver in attracting and retaining residents. Similarly, **employment opportunities** and job/career growth also make people want to stay in their cities. However, **"big city" problems** like noise, crowds, and a loss of cultural heritage are likely to make people want to move. **Affordability challenges** at the city and neighborhood level can also drive urban residents away.

This report begins by revisiting those four factors, illustrating how global perceptions have shifted in 15 global cities between 2021 and 2023. Next, we take a closer look at findings from Austin, San Francisco, New York, London, Mexico City, and Singapore. We examine how some cities that thrived during the pandemic are fighting to maintain their vitality, while others that struggled under lockdown are showing signs of resurgence. A common theme emerges from our data: urban life has pain points, but the desirability of cities is persistent. From the bubonic plague of medieval times to 1918's Great Influenza, pandemics have catalyzed urban reinvention. Our research shows that we are once again at that pivotal historical moment: the return of the city.

FOUR KEY DRIVERS

NEIGHBORHOOD DESIGN

Neighborhoods that are beautiful, authentic, and clean—and that prioritize pedestrians over cars.

EMPLOYMENT OPPORTUNITIES

Positive and increasing opportunities for job growth and career advancement in the city.

"BIG CITY" PROBLEMS

Cities that feel too big, too crowded, and too noisy—and those that are losing their cultural heritage.

AFFORDABILITY CHALLENGES

Cities and neighborhoods that are becoming less affordable, and where residents struggle to save.

Urban living has taken a complex trajectory, showing key improvements alongside persistent challenges.

Overall, city dwellers feel that many aspects of urban life have improved since 2021. However, certain obstacles—particularly those around cost and affordability—have become more challenging.

Urban residents are feeling better about their neighborhoods.

At the start of the COVID-19 pandemic, levels of neighborhood isolation intensified as cities around the world went into lockdown. Rates of violence and crime increased in many neighborhoods—particularly those that were already socioeconomically disadvantaged or marginalized. Our data indicates that some of these concerns are receding—residents of the 15 cities profiled in this data felt more positively about their neighborhoods and cities in our most recent 2023 data than they did in 2021. More people think that their neighborhoods feel authentic (66% in 2023 vs. 60% in 2021), beautiful (67% in 2023 vs. 59% in 2021), clean (65% in 2023 vs. 60% in 2021), and welcoming (63% in 2023 vs. 55% in 2021). More respondents (60% in 2023 vs. 52% in 2021) also feel that their neighborhoods offer multigenerational housing options. Additionally, 49% of urban residents feel that their neighborhoods prioritize pedestrians over cars (compared to 40% in 2021).

Opportunities for employment and career advancement have increased for global residents.

The pandemic initiated one of the most severe employment crises since the Great Depression, triggering a mass overhaul of not only how and where we worked, but the availability of work in general. Fortunately, labor markets around the world are showing signs of recovery. The global unemployment rate dropped from 6.6% in 2020 to an estimated 5.1% in 2023. Since 2021, our data has shown a 13% increase in people who feel that their career advancement has gotten better (40% in 2023 vs. 27% in 2021), and an 8% increase in people who feel that employment opportunities in their city have improved (44% in 2023 compared to 36% in 2021). According to global sources, more women left the workforce than men during the pandemic. Our data shows that, in fact, this gap continues to persist—men are 1.4x more likely than women to feel that their career advancement and employment opportunities have improved.

Many "big city" problems are improving—but many people still feel their cities are too big.

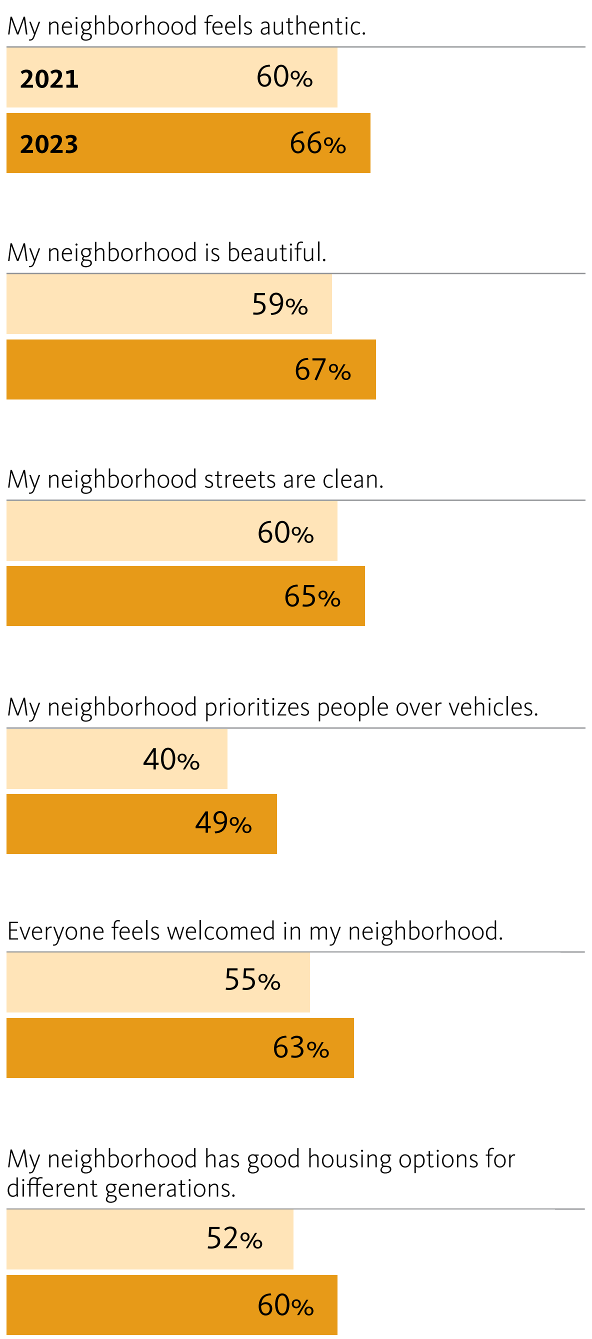
Our cities have undergone a series of dramatic shifts in recent years as a result of the impacts of the pandemic on our work, life, and travel patterns. Our 2023 data offers an insight into how those trends are evolving. Half of respondents feel that their cities have clean air (compared to 45% in 2021), and fewer respondents feel that their city is too noisy (44% in 2023 vs. 47% in 2021) or losing its cultural heritage (36% in 2023 vs. 37% in 2021). Despite these improvements, more respondents in 2023 believe their city is "too big" (43% in 2023 vs. 36% in 2021). As we found in our 2022 Urban Mobility report, today's city dwellers want to be located closer to work, errands, shopping, and leisure than they did before the start of the pandemic. The increased desire for walkability that emerged during the public health crisis remains an important requirement.

City dwellers around the world are struggling with affordability challenges.

A volatile/uncertain global economy continues to align with urban residents reporting individual financial challenges. While the pandemic disrupted the production and distribution processes of many industries, other forces like extreme weather events, Russia's invasion of Ukraine, and the Israeli-Hamas war have driven the prices of many commodities to near-record highs around the world. 45% of global respondents say that they are living paycheck to paycheck (an increase of 8% from 2021). Additionally, 63% of respondents feel that living in their neighborhoods is not as affordable as it was a year ago (an increase of 8% since 2021).

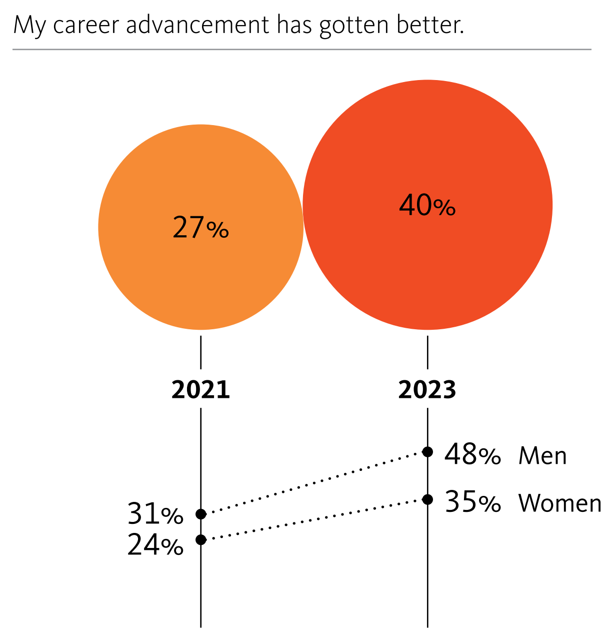
Two-thirds of urban residents say that their neighborhoods feel authentic, beautiful, clean, and welcoming.

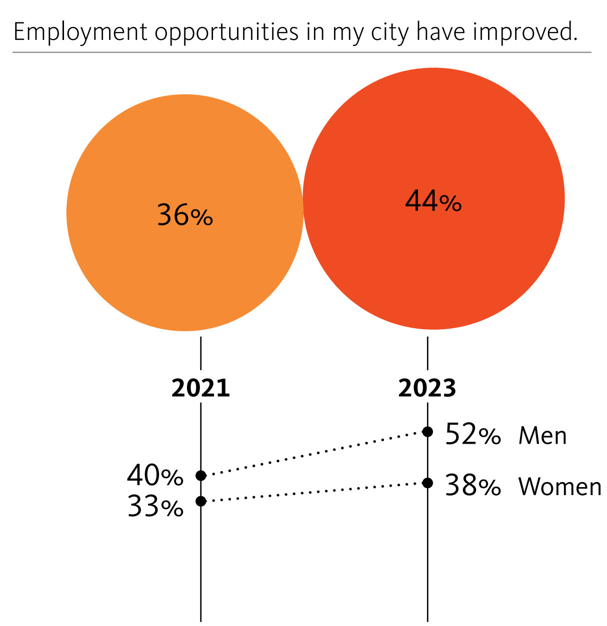
Percentage of global respondents who agree with each statement about their neighborhoods.



Perceived career advancement and employment opportunities have improved for global respondents.

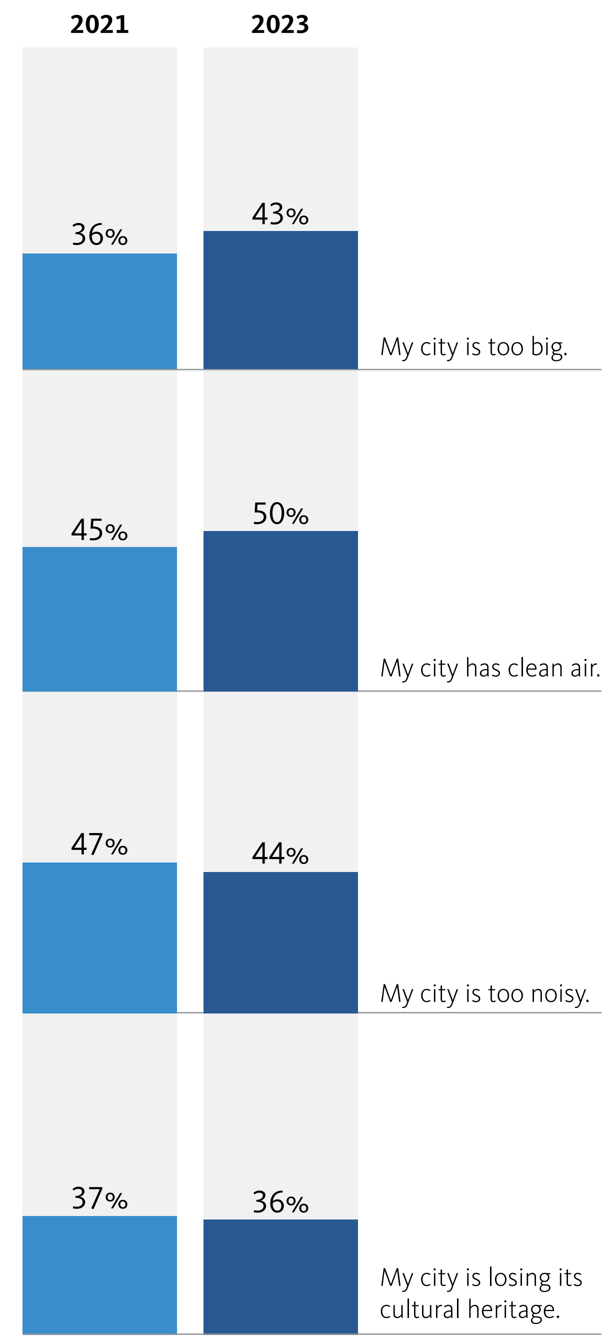
Percentage of global respondents who feel that their career advancement has gotten better and that employment opportunities in their city have improved.





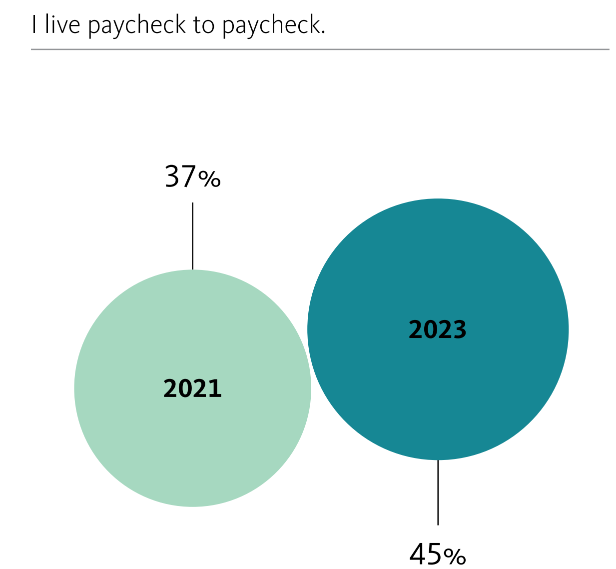
Urban dwellers feel that their city's air quality and noise level have improved, but more people feel that their city is too big.

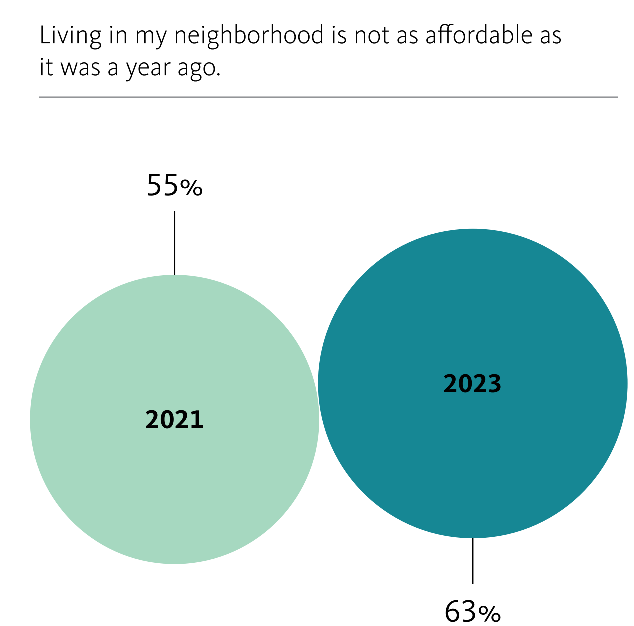
Percentage of global respondents who agree with each statement about their cities.



Nearly half of respondents live paycheck to paycheck, and two-thirds feel that their neighborhoods are becoming more expensive.

Percentage of global respondents who live paycheck to paycheck and who agree that their neighborhoods are becoming less affordable.





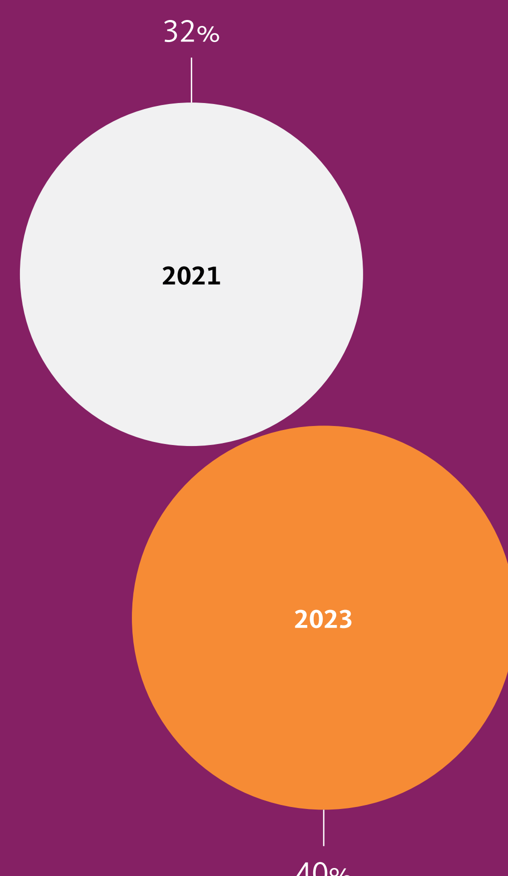
For urban residents still thinking about moving, many are now considering cities with more people.

While a much-predicted global urban exodus seems to have not materialized, global move intentions are on the rise. With a few exceptions (Atlanta, Mexico City, and Toronto), all cities in our sample showed an increase in the number of respondents who are likely to relocate. Shanghai, Denver, and London show the largest growth in potential movers.

More people want to move today than in 2021, and where they want to move has changed. Fewer respondents want to move to the suburbs or rural areas, and 73% percent of those who want to move intend to relocate to a city of some kind. The most popular destination is a city with more people, indicating that the draw of density has rebounded after a time marked by social distancing. History shows us that cities rebound after pandemics—and the public health crisis of recent years looks to be no exception.

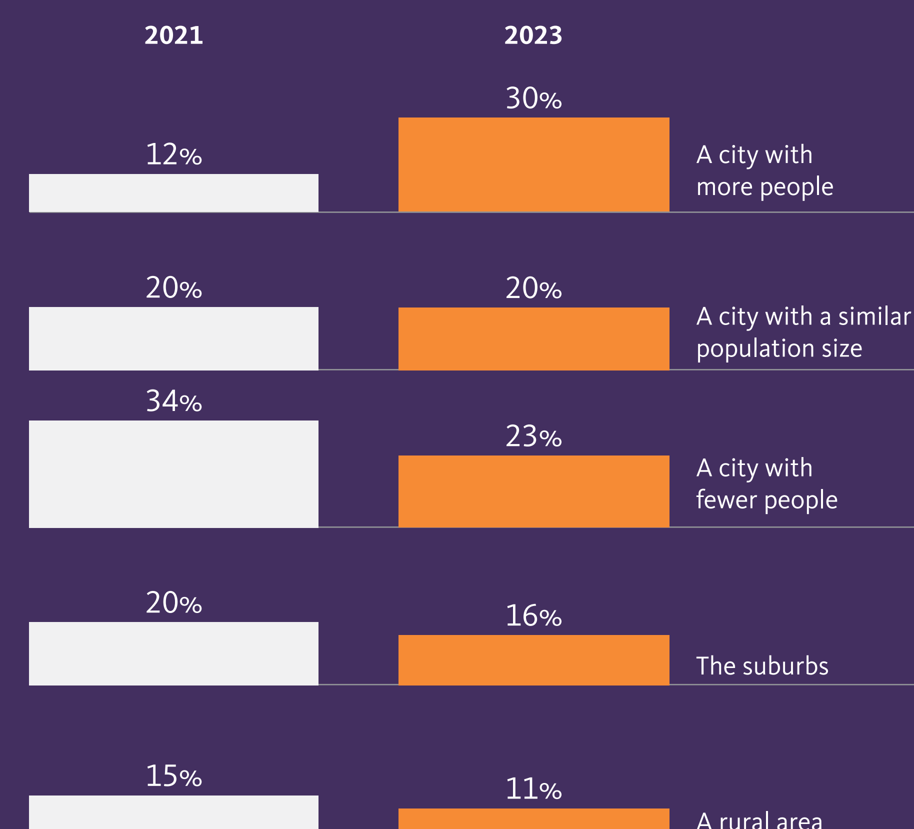
40% of urban residents say they are likely to move out of their current city.

Percentage of global respondents who are likely to move out of their cities.



Cities with more people are now the most popular move destination.

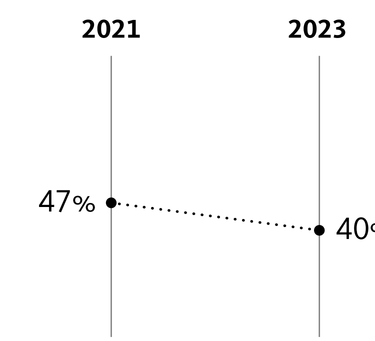
Of those who are likely to move, the percentage of global respondents who want to move to each destination.



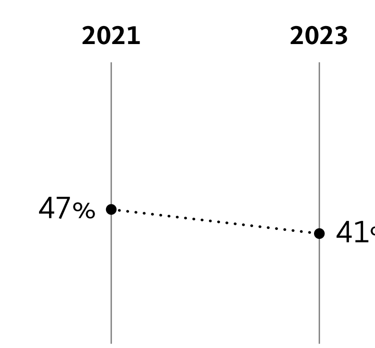
THE IMPACT OF REMOTE WORK ON THE DESIRE TO MOVE

The COVID-19 pandemic triggered a mass decentralization of the office. Even as many companies bring workers back to the workplace, this legacy has lasting impacts on how and where people not only work, but live. Our data shows that remote work is having less of an impact on people's desire to relocate than it did in 2021. However, it is still a driving consideration for roughly 40% of urban residents.

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



The ability to work remotely has made me think about moving to a different part of my city.



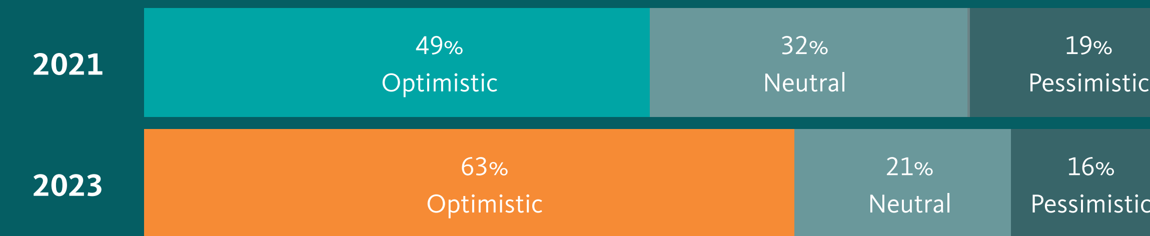
When it comes to city life, urban residents are more positive, engaged, and optimistic.

Our data shows that urban residents are increasingly satisfied with their cities as places to live. With a few exceptions (Toronto, Charlotte, Singapore, and New York), all cities have a higher Net Promoter Score than they did in 2021. The cities with the largest increase in the number of Net Promoters are Shanghai, London, Mexico City, and San Francisco. Additionally, not only are urban residents more likely to recommend their cities as great places to live, they are also more engaged. 35% of respondents say they participate in community planning decisions, compared to 24% in 2021.

Optimism for the future of cities has improved by 14 percentage points—one of the largest response increases in the entire study. Optimism is particularly high among younger residents. 70% of Millennial respondents (a 14% increase from 2021) and 62% of Gen Z respondents (an 18% increase) report feeling positively about their city's future. This shows that the allure of cities—and the opportunities for connection, culture, and career advancement that they bring—remains strong, and will likely continue to grow stronger in the years to come.

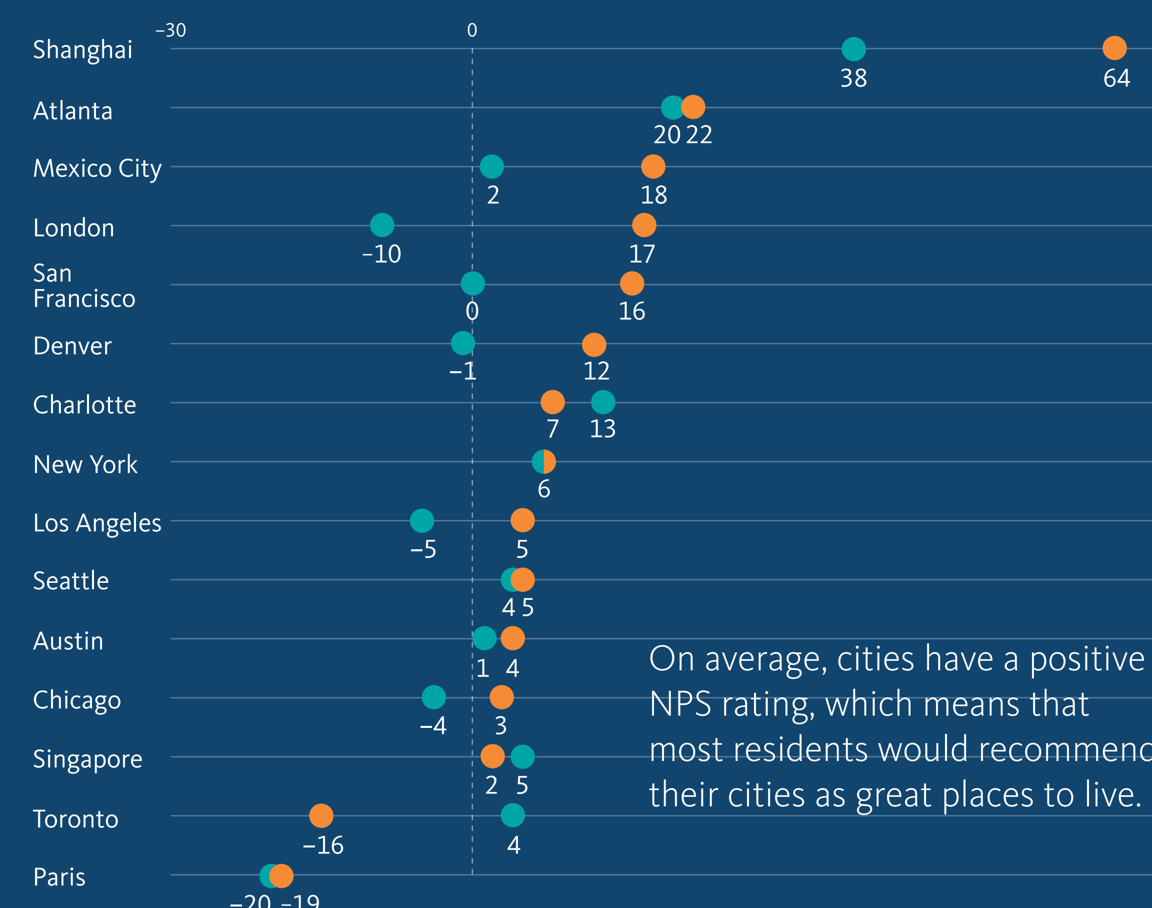
Optimism for the future of cities has improved by 14 percentage points.

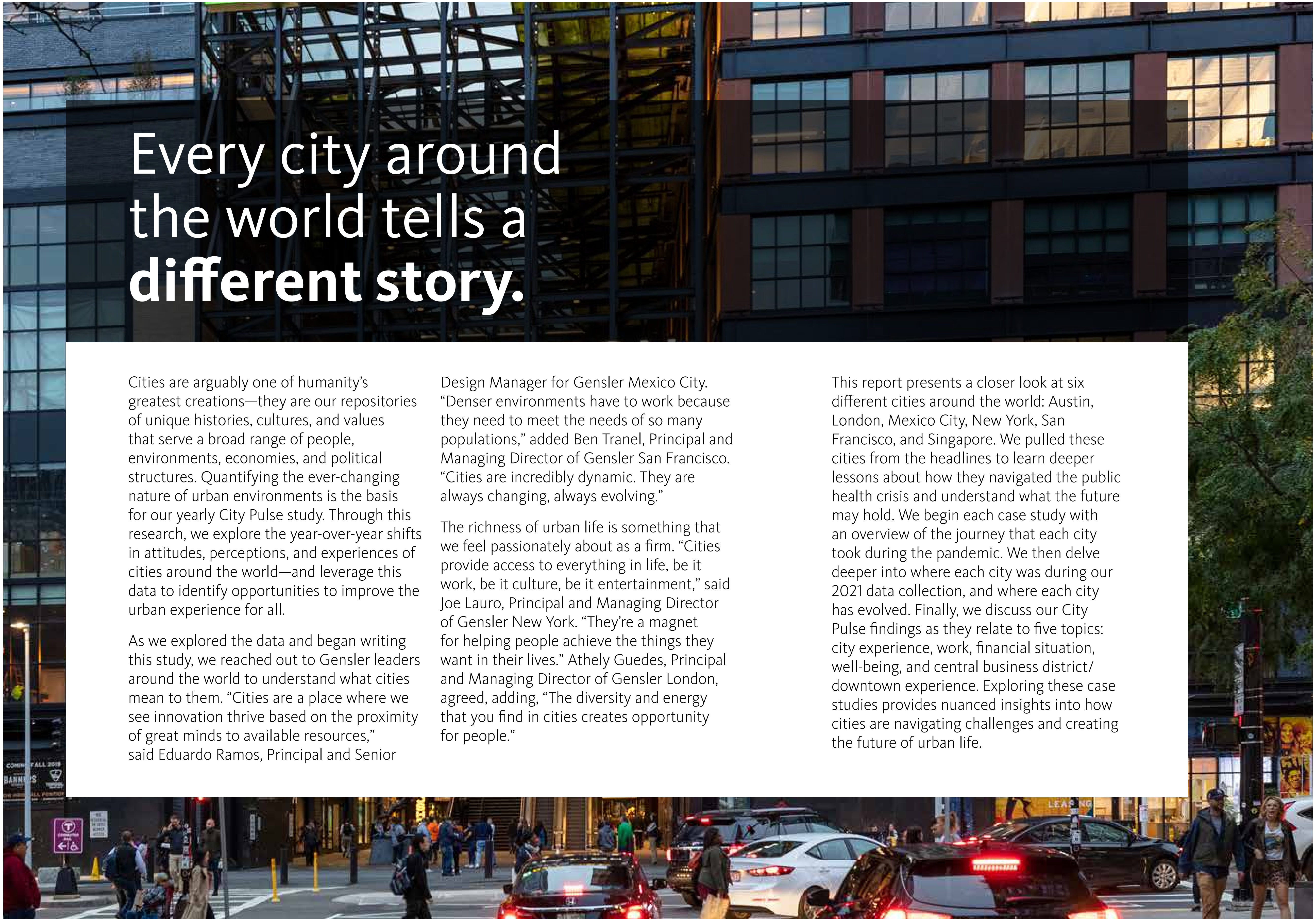
Percentage of global respondents who are optimistic, neutral, or pessimistic about the future of their cities.



Global residents in most cities are more likely to recommend their urban centers as great places to live.

This chart shows the Net Promoter Score (NPS) of each city surveyed in 2021 and 2023. A widely used market research metric, NPS gauges customer loyalty and satisfaction by asking respondents to rate their likelihood to recommend a company, product, or service to others. NPS = Promoters – Detractors





Every city around the world tells a **different story.**

Cities are arguably one of humanity's greatest creations—they are our repositories of unique histories, cultures, and values that serve a broad range of people, environments, economies, and political structures. Quantifying the ever-changing nature of urban environments is the basis for our yearly City Pulse study. Through this research, we explore the year-over-year shifts in attitudes, perceptions, and experiences of cities around the world—and leverage this data to identify opportunities to improve the urban experience for all.

As we explored the data and began writing this study, we reached out to Gensler leaders around the world to understand what cities mean to them. "Cities are a place where we see innovation thrive based on the proximity of great minds to available resources," said Eduardo Ramos, Principal and Senior Design Manager for Gensler Mexico City. "Denser environments have to work because they need to meet the needs of so many populations," added Ben Tranel, Principal and Managing Director of Gensler San Francisco. "Cities are incredibly dynamic. They are always changing, always evolving."

The richness of urban life is something that we feel passionately about as a firm. "Cities provide access to everything in life, be it work, be it culture, be it entertainment," said Joe Lauro, Principal and Managing Director of Gensler New York. "They're a magnet for helping people achieve the things they want in their lives." Athely Guedes, Principal and Managing Director of Gensler London, agreed, adding, "The diversity and energy that you find in cities creates opportunity for people."

This report presents a closer look at six different cities around the world: Austin, London, Mexico City, New York, San Francisco, and Singapore. We pulled these cities from the headlines to learn deeper lessons about how they navigated the public health crisis and understand what the future may hold. We begin each case study with an overview of the journey that each city took during the pandemic. We then delve deeper into where each city was during our 2021 data collection, and where each city has evolved. Finally, we discuss our City Pulse findings as they relate to five topics: city experience, work, financial situation, well-being, and central business district/downtown experience. Exploring these case studies provides nuanced insights into how cities are navigating challenges and creating the future of urban life.

MEETING FAST GROWTH, AUSTIN'S INVESTMENT IN INFRASTRUCTURE IS PROVIDING NEW RESILIENCE.

During the pandemic, Austin was a hot attraction. Tech workers, investors, and startup companies flocked to the city, attracted to its lower cost of living, trendy lifestyle, and business-friendly environment. Austin's emphasis on work-life balance has been alluring to recruits and an incentive for top talent to stay put. The city's popularity has brought about some growing pains related to housing and traffic. However, Austin has been swift to rise to these challenges. Austin has built housing faster than any major metro in the U.S. for the past six years—with median house prices falling more than 4% annually.

To improve its traffic and transportation experience, the city approved a plan for Austin Light Rail that will expand and improve the city's transit network. "Austin's really stepping up to the plate," said Todd Runkle, Principal and Managing Director of Gensler Austin. "From smart urban planning to working hand in hand with the community, they're making sure this city stays amazing. And let's not forget, with its vibrant culture, awesome food scene, and commitment to sustainability, investing in real estate here just makes sense. It is the place to be."

AUSTIN THEN

Austin was on a roll in 2021. The city's metro area added nearly 63,000 residents—the continuation of a decade-long trend during which Austin's population exploded by 33%. The driver was jobs. Austin continued its surge as one of the top American tech hubs—regaining 96% of spring 2020's pandemic-related job losses. With so many new jobs drawing an influx of residents, the competition for housing was beginning to impact a real estate market that was once attractive because of its affordability. Still, the city continued to benefit from its reputation as a center of culture and creativity.

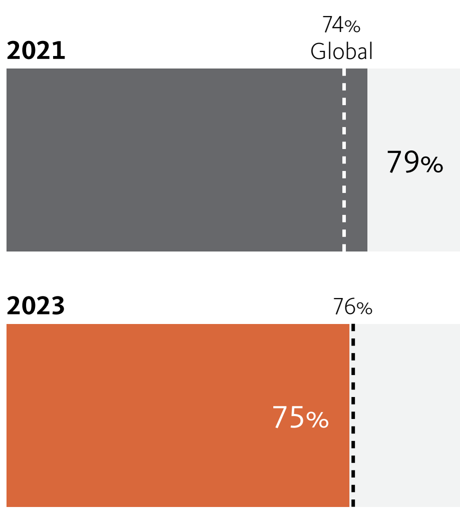
AUSTIN NOW

Austin is currently the 11th largest city in United States and its most rapidly growing metropolitan area. However, Austin's explosive growth and increasing rents have begun to price out portions of the city's foundational artistic community. 6 million square feet of new office space will become available within the next decade, the fastest rate for office market growth on the continent. To appeal to young workers, many of these buildings have been designed as one-stop complexes, providing a singular destination for working, living, shopping, and recreation. To further the city's resilience, Austin's economic development agency pledged $35 million toward recruiting emerging industries, attracting global markets, filling the talent pipeline, and improving quality of life.

CITY EXPERIENCE

Three out of four Austin residents feel their city provides a great experience.

63% of Austin residents are satisfied with their current living situation, a decrease of 1% since 2021. The number of people who feel their city provides a great experience (75%) has also decreased by 4%. Additionally, 38% of Austin residents say that the city is too noisy, a number that's remained stable over time. And fewer people believe that Austin has clean air—54% in 2023 vs. 63% in 2021.

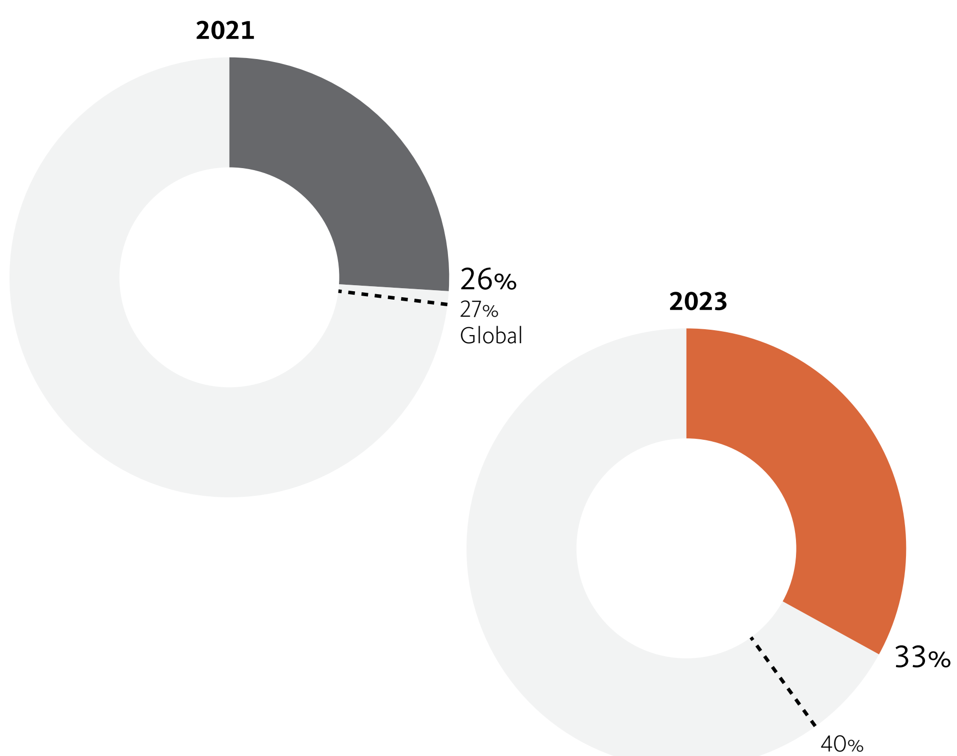


Q. My city provides a great experience.

WORK

Opportunities for career advancement in Austin have improved.

Perceptions about career opportunities have strengthened in Austin. 33% of residents feel that prospects for their own career advancement have improved, up from 26% in 2021. Yet on the broader question of employment opportunities in Austin, 44% of respondents said they thought the opportunities have gotten better, a 4% decline from 2021. A slightly higher percentage of people say they want to move out of the city (54% in 2021 vs. 51% in 2023) or relocate within their city (45% in 2021 vs. 51% in 2023) because of the ability to work remotely. Overall, 68% of Austin respondents are satisfied with their city as a place to work.

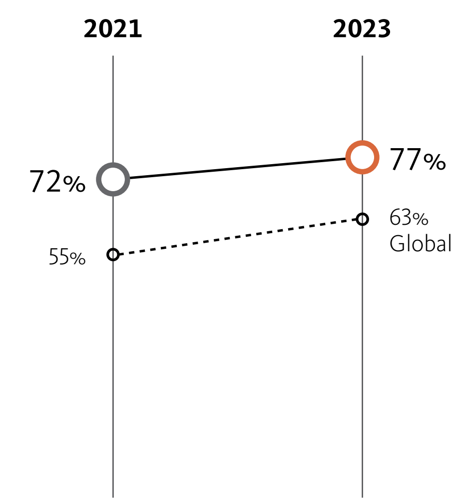


Q. My career advancement has gotten better.

FINANCIAL SITUATION

Nearly four out of five Austin residents feel that their neighborhoods are becoming less affordable.

77% of Austin respondents feel that living in their neighborhood is not as affordable as it was a year ago. That's a 5% increase from 2021, and 14% higher than the global average. Additionally, 48% of Austin residents say that they live paycheck to paycheck, an increase of 4% from 2021.

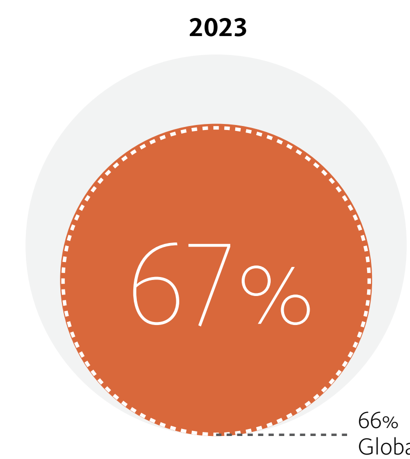


Q. Living in my neighborhood is not as affordable compared to a year ago.

WELL-BEING

Two out of three Austin residents say the city supports their well-being.

A healthy percentage of residents (67%) say they are satisfied with Austin as a place that supports well-being. However, anxiety is on the rise with 44% of respondents saying they feel nervous or anxious on some days (up 10% from 2021). Fewer people say they never experience anxiety (down from 30% in 2021 to 21% in 2023).

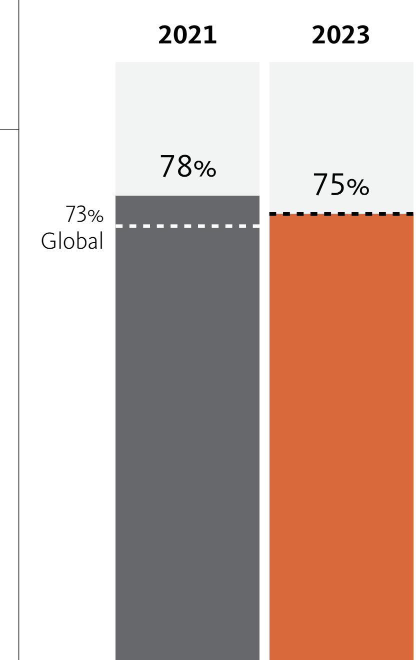


Q. My city supports my well-being.

DOWNTOWN EXPERIENCE

Three-quarters of Austin residents feel that their downtown provides a great experience.

Our data showed 75% of Austin residents think Downtown Austin provides a great experience (down 3% from 2021). When asked which physical improvements they wanted in Downtown Austin, residents most often named reduced traffic congestion (56%) and adding more green space (34%).



Q. My central business district provides a great experience.

POST-PANDEMIC, LONDON IS DRAWING BACK PEOPLE, JOBS, AND BUSINESSES.

During the pandemic, London suffered higher COVID-19 infection and casualties than other UK regions, triggering strict restrictions that strained the city. Additionally, one study estimated nearly 700,000 people left London in 2020–2021, mostly foreign-born workers doubly motivated to relocate by the virus and Brexit. However, as the city emerges from the public health crisis, "boomerang Londoners" are returning for the social, cultural, and career opportunities that have always made the urban center a magnet. And with new office and mixed-use developments planned for Central London and Canary Wharf, the city appears to be on the brink of reinvention. "London is a trillion-dollar European economy and continues to pioneer in innovation," said Richard Harrison, Principal and Managing Director of Gensler London. "It's a hugely diverse city with some of the best talent. It's a fundamental global presence."

LONDON

LONDON THEN

Britain's cost-of-living crisis started in 2021, sparked by high inflation and intensified by tax increases and rising energy prices. By October 2022, inflation had reached 11.1%, a 41-year high. Wage growth fell behind, and the largest tax increases in decades weakened purchasing power. More jobs were lost in London than in any other UK region.

During the pandemic, a wave of migrants flooded out of the country—an exodus estimated at 8% of the capital's population of 10 million Europeans employed in hospitality or other service industries. While some disputed this figure as too high, business owners were alarmed by the resulting labor shortage.

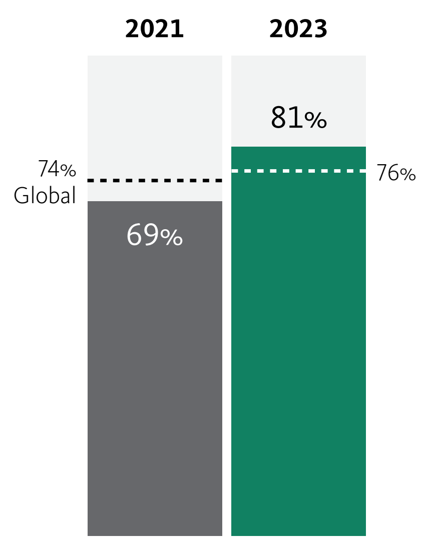
LONDON NOW

While the pandemic made housing less affordable and widened economic inequality gaps, COVID-19 also made London more livable. The city offered more opportunities for outdoor dining, added more bicycles and scooters, and improved air quality. Additionally, workers steadily made their way back to the office. Recruitment agency Hays found that about 43% of employees worked exclusively in the office between August and September 2023, compared to 36% during the same period in 2022. Fewer than 40% were working in a hybrid mode. While these numbers do not match pre-pandemic levels of office attendance, the upward trend indicates a steady recovery. Despite the hurdles faced, London is succeeding in drawing back residents, employees, and businesses to its vibrant streets.

CITY EXPERIENCE

More Londoners feel their city offers a great experience.

Londoners offered mixed signals on living conditions in the city. For example, 61% of Londoners indicated they are satisfied with their current living situation—a 6% decrease from 2021. And yet, more respondents (69% in 2021 vs. 81% in 2023) feel that London provides a great experience. In a similar vein, more Londoners said their city was too noisy (56% in 2023 vs. 53% in 2021), and at risk of losing its cultural heritage (49% in 2023 vs. 40% in 2021). Yet significantly more Londoners believe their city has clean air (40% in 2023 vs. 23% in 2021).

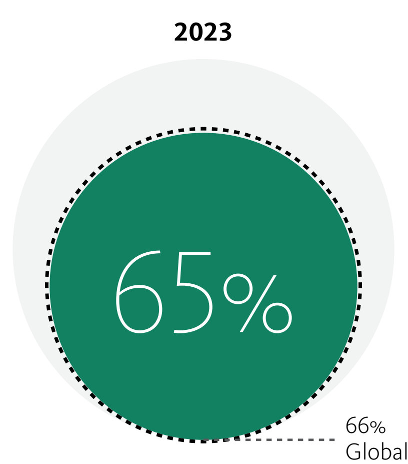


Q. My city provides a great experience.

WELL-BEING

Anxiety levels are rising, but the majority of London residents feel the city supports their well-being.

Gauging markers on well-being, Londoners are feeling more anxiety some of the time—an increase from 36% in 2021 to 43% in 2023. Fewer people say they are not feeling anxiety at all—down from 42% in 2021 to 34% in 2023. 65% of respondents say they are satisfied with London as a place that supports their overall well-being.

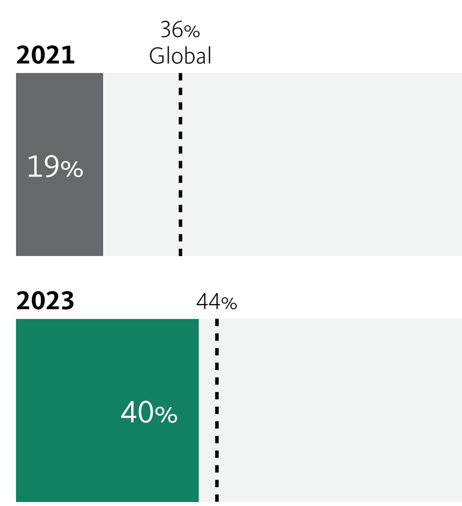


Q. My city supports my well-being.

WORK

Londoners are feeling bullish on work and employment opportunity.

Londoners are feeling significantly better about work. Our data shows 41% of Londoners feel their opportunities for career advancement have improved—a 26% increase from 2021. Similarly, 40% of Londoners think that employment opportunities in their city have gotten better, compared to 19% in 2021. When asked if the ability to work remotely had made them think about moving to a different part of the city, 31% of respondents said yes (a decrease of 9% from 2021), while 41% have thought of moving out of the city completely as a result of remote work. 80% of the Londoners we sampled are satisfied with their city as a place to work.

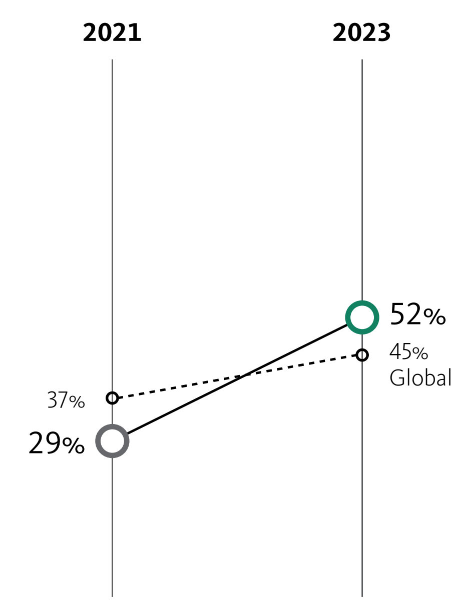


Q. Employment opportunities in my city have gotten better.

FINANCIAL SITUATION

Neighborhood affordability is still a struggle for Londoners.

52% of London respondents say that they're living paycheck to paycheck, compared to 29% in 2021. That 23% increase is the largest we observed in the study. Additionally, a staggering 77% of London residents feel that living in their neighborhood is not as affordable compared to a year ago. That's one of the highest numbers in our study and a 20% increase from 2021.

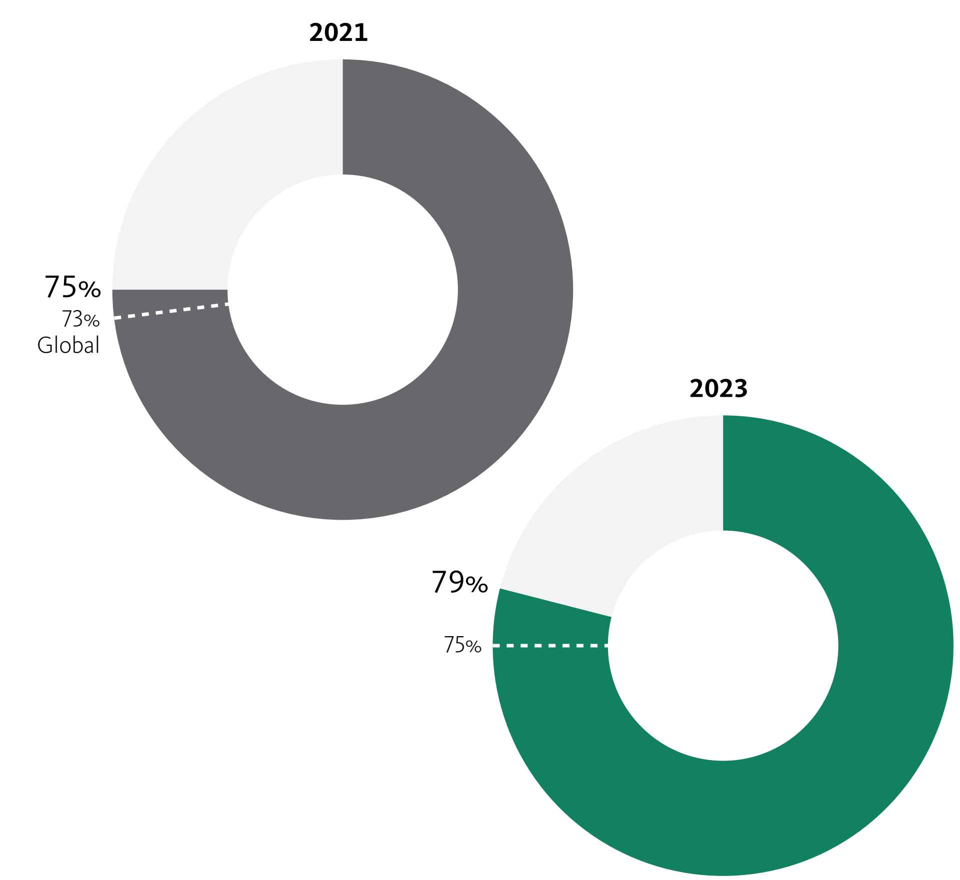


Q. I live paycheck to paycheck.

DOWNTOWN EXPERIENCE

Londoners feel the City of London and Canary Wharf provide a great experience.

When asked about the City of London and Canary Wharf, 79% of Londoners feel they provide a great experience, a 4% increase from 2021. Among the physical improvements people want to see in the city, adding more green space (43%), improving the streetscape (33%), and reducing traffic congestion (32%) were the most selected answers.



Q. My central business district provides a great experience.

MEXICO CITY

MEXICO CITY IS RECKONING WITH EXPLOSIVE ECONOMIC GROWTH ALONGSIDE A MOUNTING WATER CRISIS.

Mexico City exploded in popularity during the pandemic. The city's population grew by some 600,000 people (up from 1% annually to about 3%) between 2019 and 2023, according to The World Population Review. But this was not organic growth—a seismic shift took place. As multitudes of locals returned to their home provinces to escape the virus, a wave of foreigners took their place, gentrifying neighborhoods and driving up housing costs. But, as world economies rebounded, Mexico City reaped the benefits of huge foreign investments by companies seeking to relocate their operations or link with partners closer to the U.S. Despite this influx of capital and accelerated economic growth, a water shortage reached a crisis level. The threat emerged through many factors—from geography to infrastructure—that were compounded by climate change. "Even as we navigate the water crisis, Mexico City is a resilient city that continues to reinvent itself. The innovation and entrepreneurial spirit here are comparable to few cities in the world. Our city is full of opportunities—a gigantic market that is open and eager for new ideas and welcoming to new people," said Carlos Pérez-Gavilán, Co-Managing Director of Gensler Mexico City.

MEXICO CITY THEN

In 2021, masses of Mexico City residents had returned to their hometowns to care for family or escape the challenges of living under lockdown. Their exodus upended the city's real estate sector. Droves of foreigners, attracted by the abundance of vacant housing, chose Mexico City as the place to wait out the pandemic. In the process, rising housing prices and inflation made the city more unaffordable for locals. According to one survey, 55% of Mexico City respondents were struggling to pay their rent or mortgage. Many moved because they couldn't afford their rent. Beyond that, the pandemic destroyed 12 million formal and informal jobs, about 3 million of which had not been recovered by 2021.

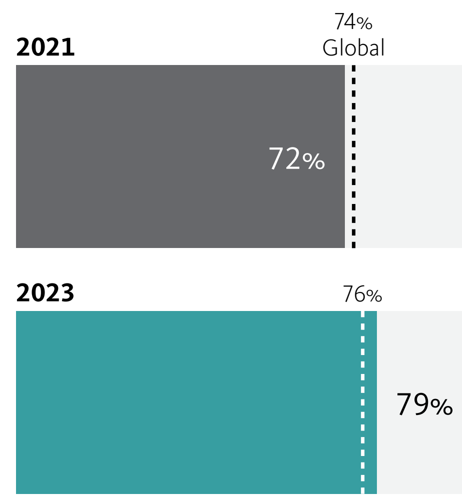
MEXICO CITY NOW

Robust population growth, coupled with an influx of foreigners, heightened the cost-of-living crisis in Mexico City. As it became one of the world's top destinations for long-term renters, more and more Mexicans were displaced as many neighborhoods gentrified. The shortage of housing was underscored by an MIT study concluding that Mexico needs to build 800,000 housing units a year for two decades to keep up with demand. As for the water crisis, Conagua, the national water commission, is undertaking a 3-year project to install, develop, and improve water infrastructure to help the city cope. While office space occupancy inched back up, remote work caught on. The work from home trend was so pronounced that buildings in some office corridors were being converted into apartments, hospitals, and stores. Even so, more than 75% of employees have returned to the office, according to CBRE.

CITY EXPERIENCE

Mexico City ranks very high on living experience, with some of the largest gains in our study.

Known for its good food and rich culture, Mexico City rated high in our study. 70% of people were satisfied with their current living situation, which is one of the highest ratings in this study. Experience numbers are high as well, with 79% of respondents feeling their city offers a great experience (compared to 72% in 2021). The percentage increases for living situation and city experience are some of the largest in the study. Fewer people believe that their city is too noisy (77% in 2021 vs. 66% in 2023) or losing its cultural heritage (44% in 2021 vs. 33% in 2023), and more feel that their city has clean air (15% in 2021 vs. 25% in 2023).

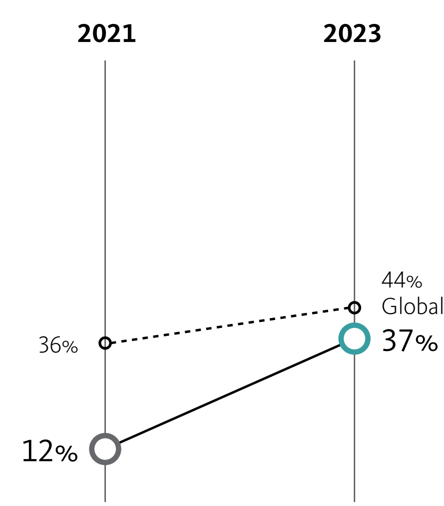


Q. My city offers a great experience.

WORK

Perceptions of career advancement are on the uptick, and the majority are satisfied with the city as a place to work.

For workers in Mexico City, career advancement and employment are on the rise. Half of respondents feel that their career advancement has gotten better, compared to only 34% in 2021. When it comes to employment opportunities, 37% believe their work opportunities have gotten better—an improvement of 25% from 2021. Remote work is having less of an influence on move intentions compared to two years ago, with roughly one-third of residents thinking about moving out of the city or to a different part of the city (roughly an 8% decrease for both answers since 2021). And 70% of Mexico City residents say they are satisfied with their city as a place to work.

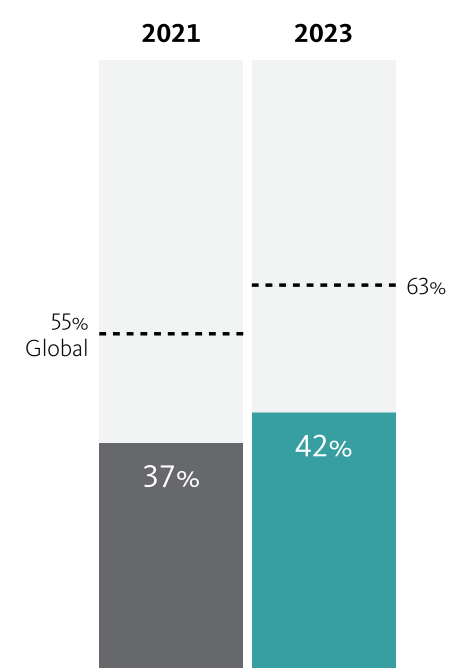


Q. Employment opportunities in my city have gotten better.

FINANCIAL SITUATION

Mexico City is performing better on affordability than the global average.

42% of Mexico City respondents say that living in their neighborhood is not as affordable as it was a year ago (up from 37% in 2021). This number is 21% lower than the global average. Additionally, 40% of Mexico City respondents say that they live paycheck to paycheck (a 3% increase from 2021).

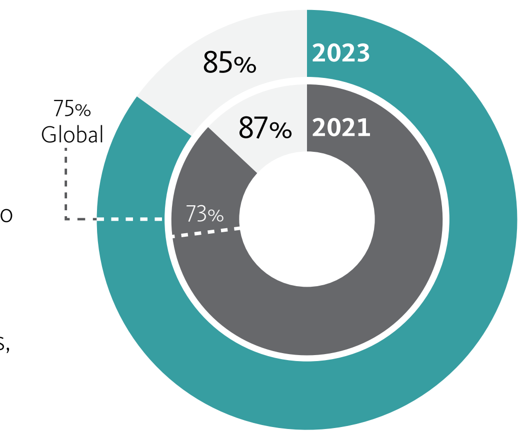


Q. Living in my neighborhood is not as affordable compared to a year ago.

DOWNTOWN EXPERIENCE

More than 8 out of 10 Mexico City residents think their CBDs provide a great experience.

Overall, 85% of respondents think Mexico City's CBDs (Paseo de la Reforma, City of Santa Fe, and Insurgentes) provide a great experience—down 2% over two years. In terms of physical improvements, people are most eager to see less traffic congestion (45%), more green space (44%), and improved public transit and micromobility options (37%).

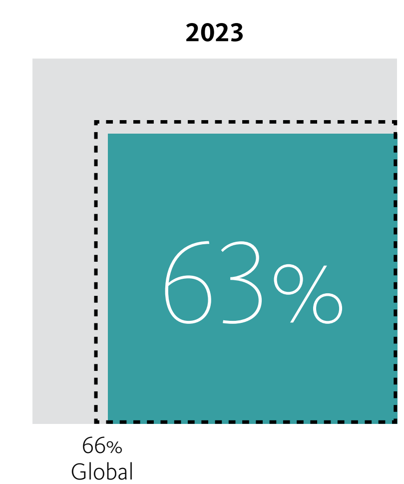


Q. My central business district provides a great experience.

WELL-BEING

Levels of anxiety are rising significantly, but most respondents feel the city supports their well-being.

When asked if they feel anxious on some days, 41% of Mexico City residents said they do—a 9% increase from 2021. Even so, 63% of respondents said they are satisfied that Mexico City supports their overall well-being.



Q. My city supports my well-being.

NEW YORK

THE PANDEMIC HIT NEW YORK HARD—BUT ITS RECOVERY HAS BEEN SWIFT.

From America's perspective, New York was the epicenter of the pandemic. A year after confirming the first case of COVID-19, more than 30,000 New Yorkers had died and close to 800,000 had been infected. The population decreased by 460,000 as people fled. Nightclubs, concert venues, and theaters were struggling, taking away prime attractions for visitors. Nearly 200 of the city's 700 hotels closed. And Broadway's theaters shuttered for 18 months. After two years of recovery, the city is reinvigorated. In January 2024, almost 70% of Manhattan workers were at their offices on a typical weekday. Even better, jobs returned to full strength—and then some—as the city set a new record of 4.7 million jobs. "Some speculated that the pandemic would mean the end of New York City," said Amanda Carroll, Principal and Managing Director of Gensler New York. "But there's a power in the city you can't replicate. It's built on a culture of excellence." Carlos M. Martínez Flórez, Principal and Managing Director of Gensler New York, adds, "New York City is a city that belongs to the world. It's an incredible symbol of the modern era."

NEW YORK THEN

When COVID-19 exploded in the U.S., New York City was the epicenter. The rapid spread brought untold suffering, with roughly 800 fatalities daily. One out of five jobs vanished; in the restaurant industry, 70% of jobs disappeared. These job losses drove an enormous population drain, estimated at 336,677 from April 2020 to July 2021 as residents migrated away. Tourism collapsed and crime rates spiked, but the housing market took off. In all five boroughs, the median sales price of co-ops and condos rose 7% in 2021. Meanwhile, restaurants and theaters were on the brink of insolvency, while hotels were largely empty of the tourists that fed the city's economy.

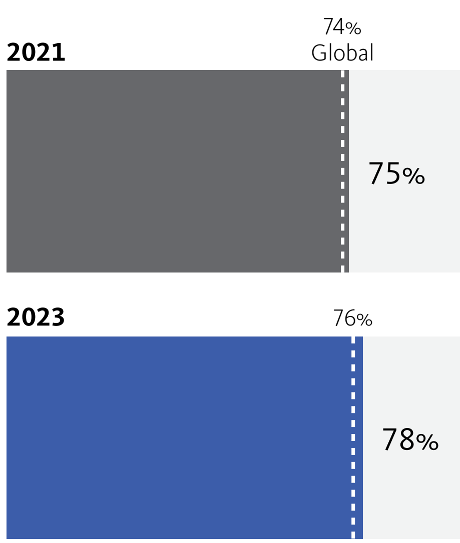
NEW YORK NOW

Although the pandemic lingered, the city's economy recovered steadily. By early 2023, New York City had regained nearly all its lost jobs. The retail, dining, and hospitality sectors improved. Apartments remained in high demand, with record-high sales. On the other side, New York faced the worst affordability crisis in 20 years. Fully half of the city's households lacked the income to comfortably afford an apartment, obtain adequate food and health care, and get around. A surge in homelessness landed 70,000 people in city shelters. By December 2023, office occupancy was only 19% lower than pre-pandemic levels, putting New York ahead of all other major U.S. cities. Despite facing significant challenges, New York City's remarkable economic recovery showcases its resilience and durability in the face of disruption.

CITY EXPERIENCE

More people say New York offers a great experience.

65% of New Yorkers are satisfied with their current living situation, a number that's remained stable since 2021. But more people think the city offers a great experience (78% today vs. 75% in 2021). However, 57% of respondents feel that the city is too noisy, a number that's remained stable since 2021.

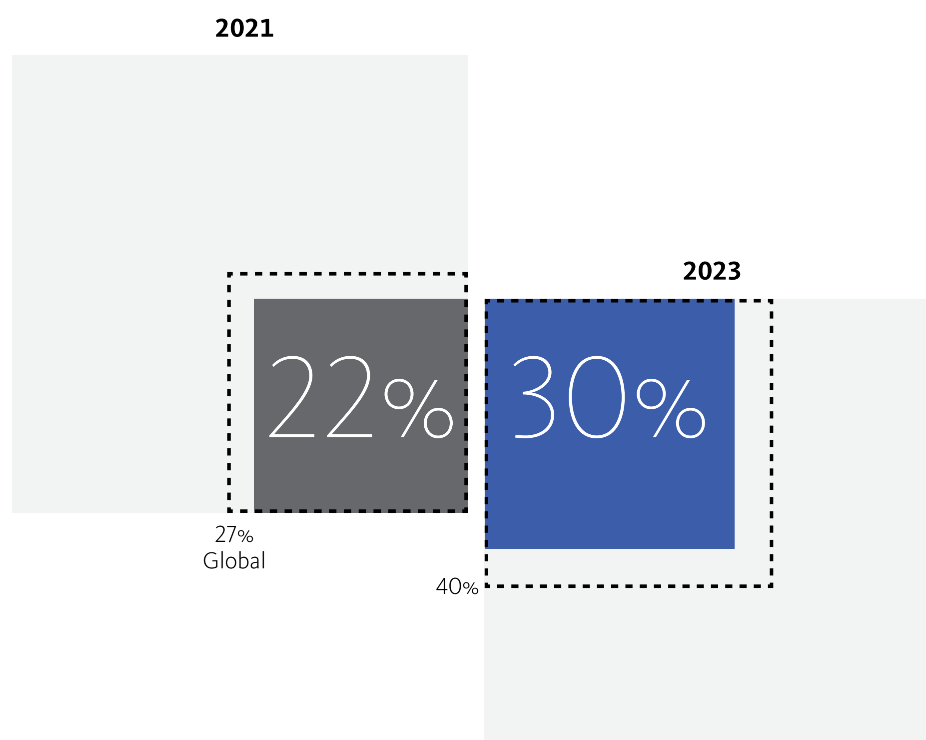


Q. My city offers a great experience.

WORK

A growing percentage cite improvements in career prospects and job opportunities.

A growing percentage of New Yorkers feel that their own career advancement (30% today vs. 22% in 2021) and citywide employment opportunities (36% today vs. 33% in 2021) have improved. But the ability to work remotely seems to have less of an influence on move intentions than it did in 2021. There's a 4% decrease in the desire to move to a different part of the city as a result of remote work (45% today vs. 49% in 2021), and a 9% decrease in the desire to leave the city entirely (38% today vs. 47% in 2021). A solid 69% of respondents are satisfied with the city as a place to work.

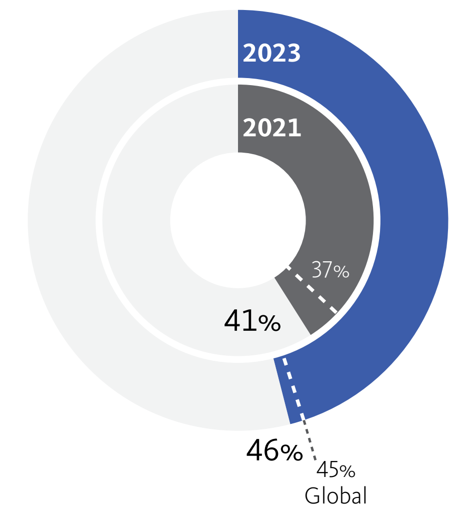


Q. My career advancement has gotten better.

FINANCIAL SITUATION

More New Yorkers say they are living paycheck to paycheck.

46% of New York respondents say that they are living paycheck to paycheck (compared to 41% in 2021). Additionally, 62% say that living in their neighborhood is not as affordable compared to a year ago (an increase of 6% from 2021). Both numbers align with the global averages for these questions.

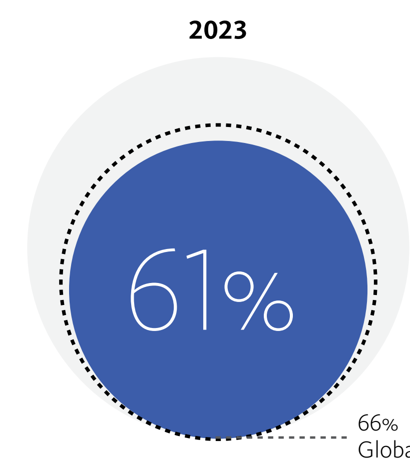


Q. I live paycheck to paycheck.

WELL-BEING

Although 4 out of 10 New Yorkers feel anxiety, the majority say New York supports their well-being.

Numbers relating to well-being have remained stable over the course of the pandemic. However, 39% of New York respondents say they feel anxious some days. There's also a slight increase (14% in 2021 vs. 15% in 2023) in the percentage of people who say they feel anxious more than half of the time. Even so, 61% of New Yorkers in our survey feel satisfied with the city as a place that supports their well-being.

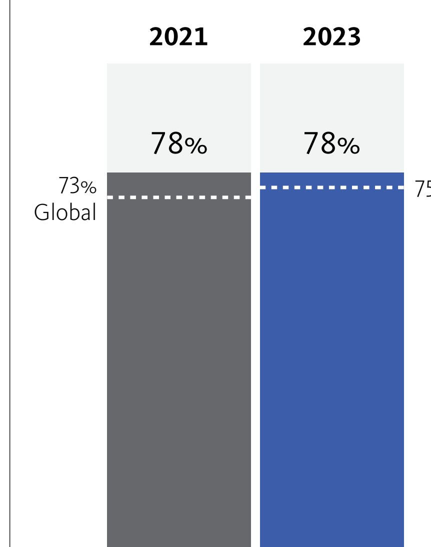


Q. My city supports my well-being.

DOWNTOWN EXPERIENCE

New Yorkers are more enthusiastic about Midtown Manhattan and Lower Manhattan as a backdrop for urban life.

Compared to 2021, the people of New York feel more positively now about Midtown Manhattan and Lower Manhattan as places to enjoy the full spectrum of activities we asked about. The physical improvements that people most desire are reducing traffic congestion (44%), adding more green space (35%), and improving walkability (35%). And 78% of respondents think Midtown Manhattan and Lower Manhattan provide a great experience—a response that's the same as 2021.



Q. My central business district provides a great experience.

SAN FRANCISCO

SAN FRANCISCO IS ON THE BRINK OF A REVIVAL, FUELED BY AI, INNOVATORS, AND INVESTORS.

San Francisco's rapid decline was headline news in 2021. Critics harped on the doom loop describing the cycle of challenges—from street crime to remote work—that would leave the city in despair. But the city proved resilient. "This has always been a place of opportunity," said Katie Buchanan, Principal and Managing Director of Gensler San Francisco. "There's a mindset that you can redefine yourself here that is very much part of our culture." And, in this case, the city's redefinition just might be the economic transformation spawned by artificial intelligence. According to The Economist, San Francisco has no serious rival in AI, which pundits predict will power a global surge in productivity. The city accounted for nearly one-tenth of 2023 AI job postings in the U.S., more than anywhere else, said the Brookings Metro think tank. "That feeling is in the air again that was here in 2011 and in the mid-90s, where it felt like all these founders and entrepreneurs were onto something," said Ben Tranel, Principal and Managing Director of Gensler San Francisco. "There's a renewed sense that we're on the cusp of the next big thing here."

SAN FRANCISCO THEN

San Francisco took a hard hit during the pandemic. On the streets, crime, drug overdoses, and homelessness soared. Between 2020 and 2022, the city's population fell by 7.5%. The exodus continued even as the health emergency drew to a close. Many San Francisco tech workers moved farther out to less expensive cities, while many living outside the city decided against relocating there. As the pandemic crisis and its lockdown restrictions ended, many tech workers chose not to return to their offices. This left many San Francisco buildings partially or mostly empty, damaging retail sales and disrupting city life. In addition, hundreds of businesses closed permanently. With the streets empty, personal safety became a greater concern. Negative media coverage took an enormous toll on the city's reputation: just 52% of Americans polled by Gallup in 2022 viewed San Francisco as a safe place to live, plunging 18 percentage points from its heyday in 2006.

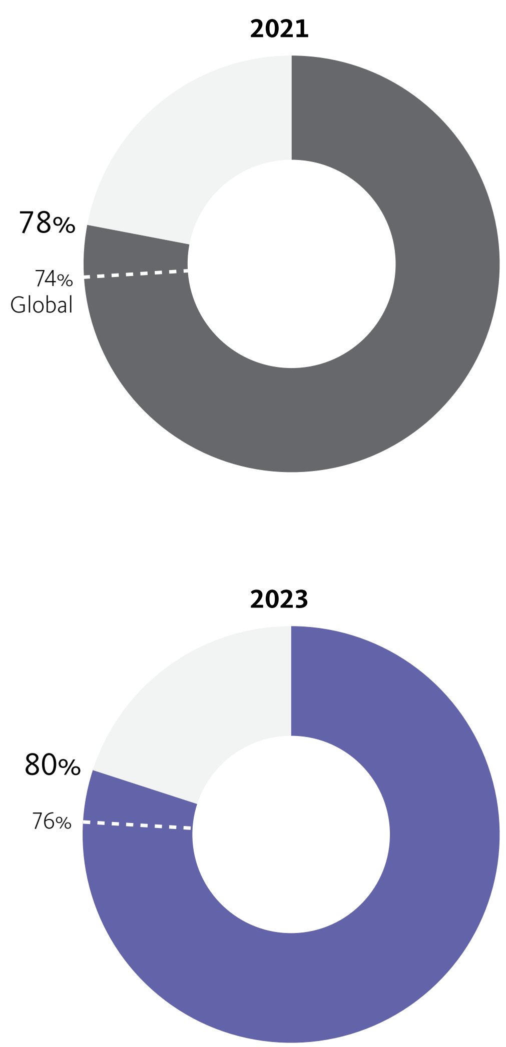
SAN FRANCISCO NOW

The state of the city is a mix of good and bad. In the spring of 2023, downtown had recovered 67% of its activity level compared to pre-pandemic times, according to the University of Toronto School of Cities. But San Francisco's office vacancy rate hit a new high of 35% in December 2023. Meanwhile, T-Mobile, Whole Foods, and Nordstrom all announced they were leaving the retail core. Just as things appeared to be at a low point, new signs of life appeared. The rise of artificial intelligence provided a boost. Startups that focus on AI began leasing more and more office space. Investors showed confidence too, with venture funding to San Francisco–based startups bouncing back to two-thirds of its peak in 2023. Then OpenAI, the creator of ChatGPT, subleased nearly 500,000 square feet from Uber's headquarters in Mission Bay—San Francisco's biggest office lease deal since 2018. This move brings new hope that tech workers will reinvigorate the city's downtown and economy.

CITY EXPERIENCE

Contrary to reports of the city's demise, more people are feeling satisfied with their living conditions in San Francisco.

In spite of the headlines bemoaning the "failed city," 72% of people in San Francisco are satisfied with their current living situation—a 7% increase since 2021. A slightly higher percentage of people (80% in 2023 vs. 78% in 2021) believe the City by the Bay provides a great experience. Our survey found San Francisco residents feel better about their quality of life. Fewer people think the city is too noisy (37% in 2023 vs. 46% in 2021) or that it is losing its cultural heritage (41% in 2023 vs. 49% in 2021). And a larger percentage of people agree that San Francisco has clean air (68% in 2023 vs. 57% in 2021).

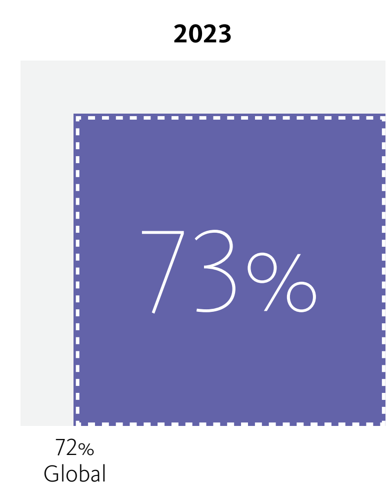


Q. My city provides a great experience.

WORK

More people believe that employment opportunities have improved, and that prospects for career advancement are better.

In 2023, nearly half of respondents (48%) believe their career advancement has gotten better—up 23% since 2021. Similarly, 47% feel that employment opportunities in San Francisco have gotten better, compared to 34% in 2021. When asked about the flexibility provided by remote work, 46% of people say it has made them think about moving out of the city (compared to 56% in 2021) or to a different part of the city (compared to 51% in 2021). A healthy 73% of respondents are satisfied with their city as a place to work.

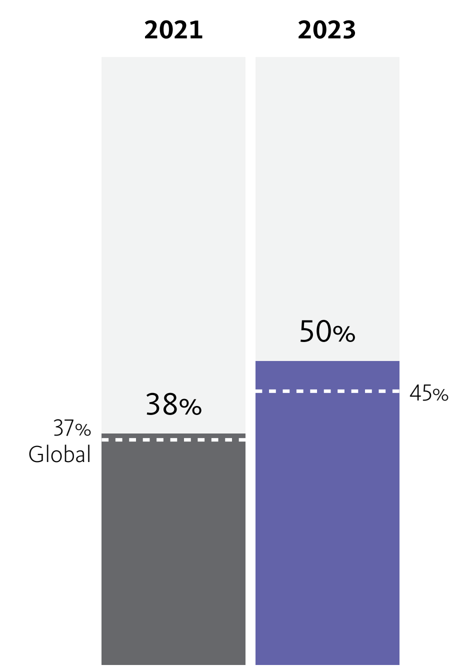


Q. I am satisfied with my city as a place to work.

FINANCIAL SITUATION

Half of San Francisco residents are living paycheck to paycheck.

50% of San Francisco residents say that they're living paycheck to paycheck, a 12% increase from 2021 and slightly higher than the global average of 45%. Additionally, 63% of San Francisco respondents feel that living in their neighborhood is not as affordable as it was a year ago (up from 59% in 2021).

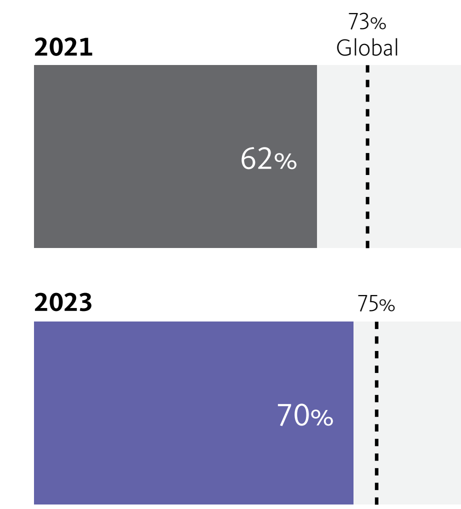


Q. I live paycheck to paycheck.

DOWNTOWN EXPERIENCE

A greater percentage of San Franciscans now feel the Financial District provides a great experience.

Enthusiasm for the city's Financial District is gaining ground: 70% of San Franciscans feel that the Financial District provides a great experience (up 8% from 2021). Adding more green space (34%), reducing traffic congestion (33%), and improving streetscapes (31%) are the top physical improvements residents want to see.

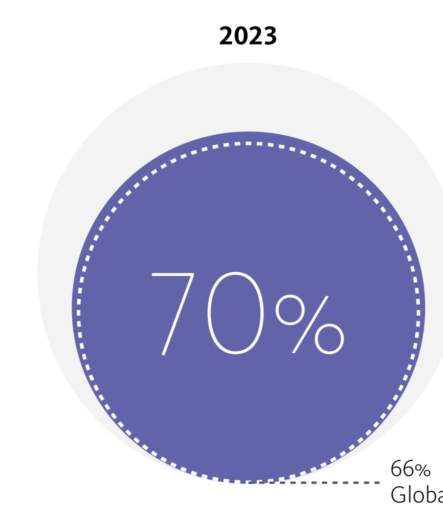


Q. My central business district provides a great experience.

WELL-BEING

Most residents say the city supports their well-being, although a significant number report feeling acute anxiety at times.

One-third of residents say they do not experience anxiety at all (a 1% decrease from 2021), while 40% report feeling anxious some days, a 5% increase from 2021. Only 15% of people in San Francisco are experiencing anxiety more than half the time, a 5% decrease from 2021. 70% of respondents are satisfied with the city as a place that supports their overall well-being.



Q. My city supports my well-being.

SINGAPORE

SINGAPORE'S RECOVERY, AIDED BY GOVERNMENT INTERVENTIONS, IS CHALLENGED BY HIGH HOUSING COSTS.

Singapore proved resilient in minimizing the impact of the pandemic, aided by one of the world's largest fiscal responses to the crisis. Even so, demand-supply imbalances in the global economy bore heavily on Singapore, which relies on imported goods and services—including more than 90% of its food. Consumer prices rose 6.1% in 2022. By 2023, skyrocketing home prices and rents were being fueled by surging demand due to the re-opening of the economy and the return of foreign workers. Today, there's a robust market for office space and workers have largely returned to the office.

"Singapore's quality of life and endless opportunities speak for themselves," said Angela Spathonis, Principal and Managing Director of Gensler Singapore. "Despite rising expenses, it's undeniably a global gateway, thanks to its safety, livability, and vibrant culture. Plus, seeing how swiftly Singapore has bounced back from the pandemic, with its proactive measures and top-notch healthcare system, investing here isn't just about property; it's about being part of a thriving, resilient, and rejuvenated community in a city that never fails to impress."

SINGAPORE THEN

Unlike many other cities, direct experience with public health emergencies like SARS informed Singapore's response, which benefited from investments in infectious disease prevention. However, the pandemic took emotional tolls on the city that were attributed to the stress of lockdowns. Additionally, widespread infections in dormitories for migrant workers revealed how much heavy industry relied on low-cost labor.

More than half of the 300,000 migrant workers living in Singapore's dormitories contracted COVID-19. Consumer-facing sectors such as retail, food services, and tourism were badly impacted as well. Yet many jobs for locals were saved by the Jobs Support Scheme, a government program that rescued some 165,000 jobs.

SINGAPORE NOW

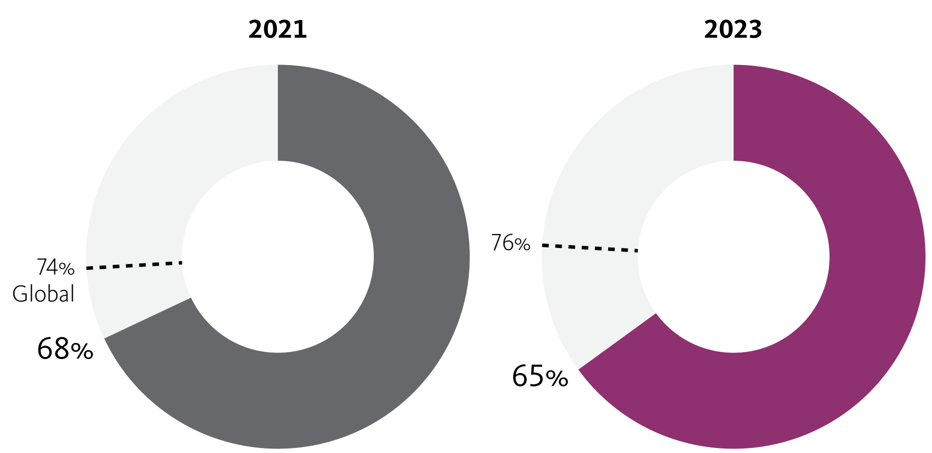
In 2023, trade-dependent economies like Singapore felt the effects of global disruption, resulting in greater housing costs and higher core inflation. Recovery began in the second half of the year with the resumption of air travel and expansion in services and tourism. Singapore's population swelled by 5% as 162,000 foreign workers returned to the city-state between June 2022 and June 2023.

In addition, international tourist arrivals more than doubled in 2023 compared to the previous year, surging to 13.6 million. In office buildings, most workers were back at their desks. Almost 80% of Singapore workers showed up on mandated days, more than the global average of 75%.

CITY EXPERIENCE

Roughly two-thirds of Singapore respondents feel their city provides a great experience.

On virtually every question related to city living, Singapore's ratings have declined. Fewer people are satisfied with their living situation (61% in 2023 compared to 69% in 2021), and fewer feel that their city offers a great experience (65% in 2023 compared to 68% in 2021). Additionally, fewer Singapore respondents feel that their city has clean air (66% in 2023 compared to 71% in 2021). 40% of Singapore respondents believe their city is losing its cultural heritage, a number that's remained stable since 2021.

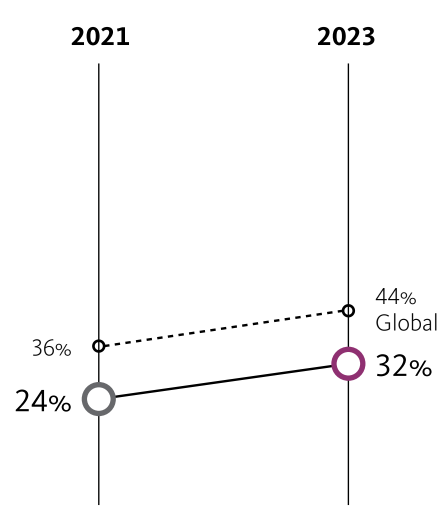


Q. My city provides a great experience.

WORK

Career and employment opportunities are getting better over time.

Public perceptions about career advancement (28% in 2023 compared to 22% in 2021) and employment opportunities (32% in 2023 compared to 24% in 2021) have improved since the last study, but less than one-third of respondents believe that those conditions are improving. While fewer people are considering a move to a different part of the city due to the flexibility presented by remote work (42% in 2023 compared to 45% in 2021), a slightly higher number of people want to move out of the city entirely for that reason (41% in 2023 compared to 40% in 2021). 70% of Singapore respondents report that they are satisfied with their city as a place to work.

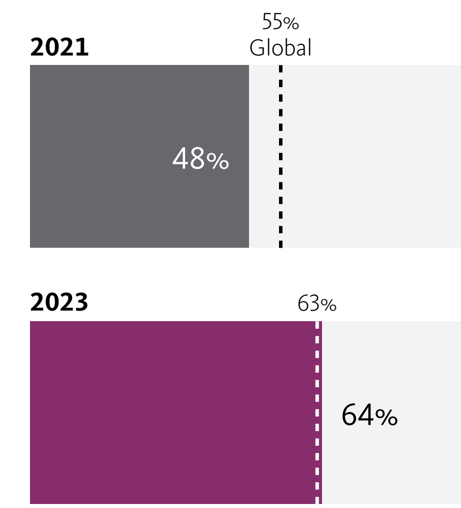


Q. Employment opportunities in my city have gotten better.

FINANCIAL SITUATION

Two out of three Singapore respondents feel that their neighborhoods are becoming less affordable.

64% of Singapore's respondents say that living in their neighborhood is not as affordable as it was a year ago, compared to 48% in 2021. This increase is one of the largest in our study. Additionally, 38% of Singapore residents say that they are living paycheck to paycheck (a 3% increase from 2021).

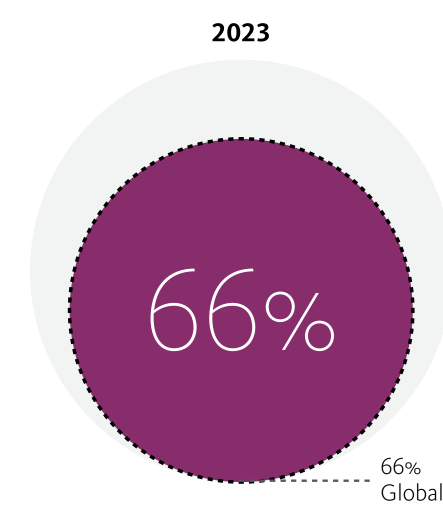


Q. Living in my neighborhood is not as affordable compared to a year ago.

WELL-BEING

Two out of three Singapore respondents say that the city supports their well-being.

On the whole, well-being numbers remained stable from 2021–2023. However, fewer people say they're not anxious at all (27% in 2023 compared to 31% in 2021). On the positive side, 66% of Singapore respondents are satisfied with their city as a place that supports their overall well-being.

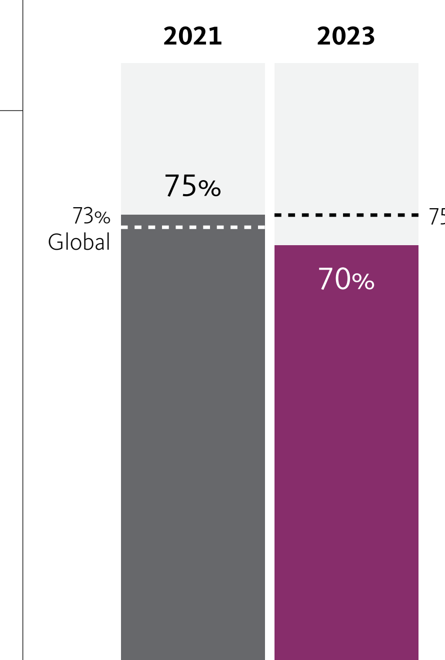


Q. My city supports my well-being.

DOWNTOWN EXPERIENCE

Seven out of 10 Singapore respondents feel that Singapore's Downtown Core provides a great experience.

Overall, 70% of respondents feel that Singapore's Downtown Core provides a great experience—a 5% decrease from 2021. When asked what physical improvements they most want to see, people identified adding more green space (42%), reducing traffic congestion (38%), and providing more places to dine and socialize (32%).

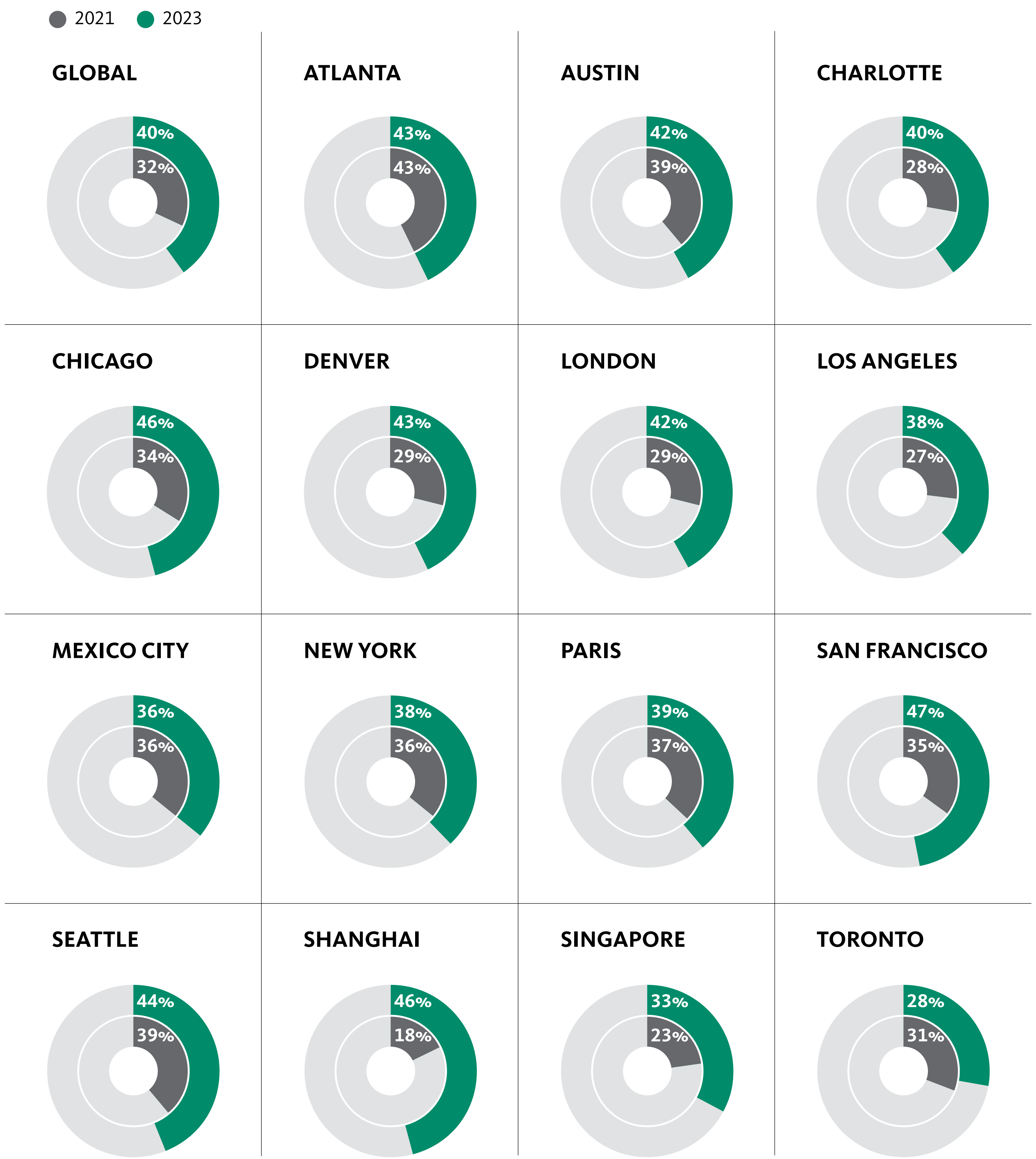


Q. My central business district provides a great experience.

APPENDIX

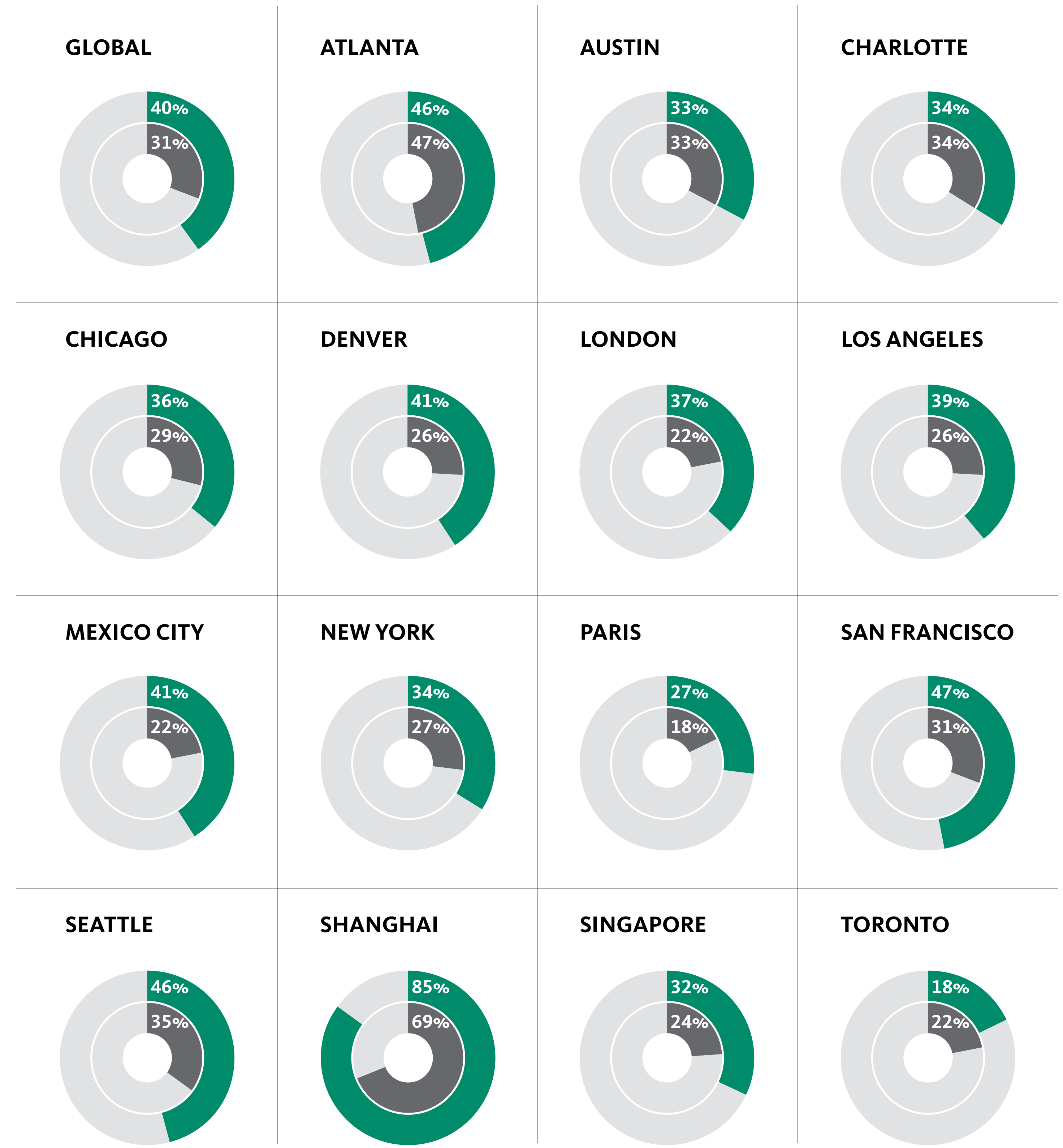
Based on my current experience, I am likely to move out of my current city.

Percentage of respondents who agree with the statement.



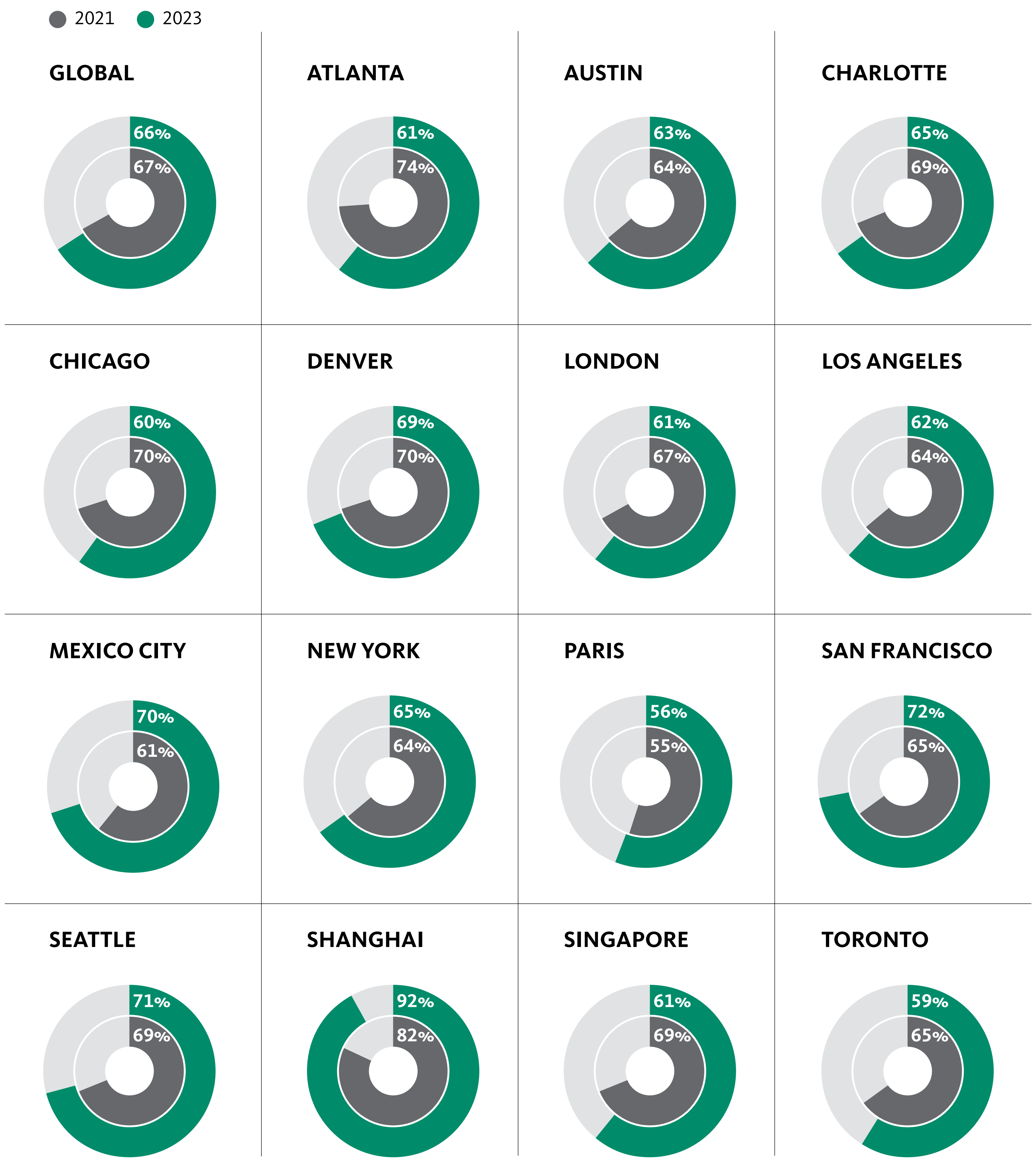
Compared to a year ago, my financial situation has gotten better.

Percentage of respondents who agree with the statement.



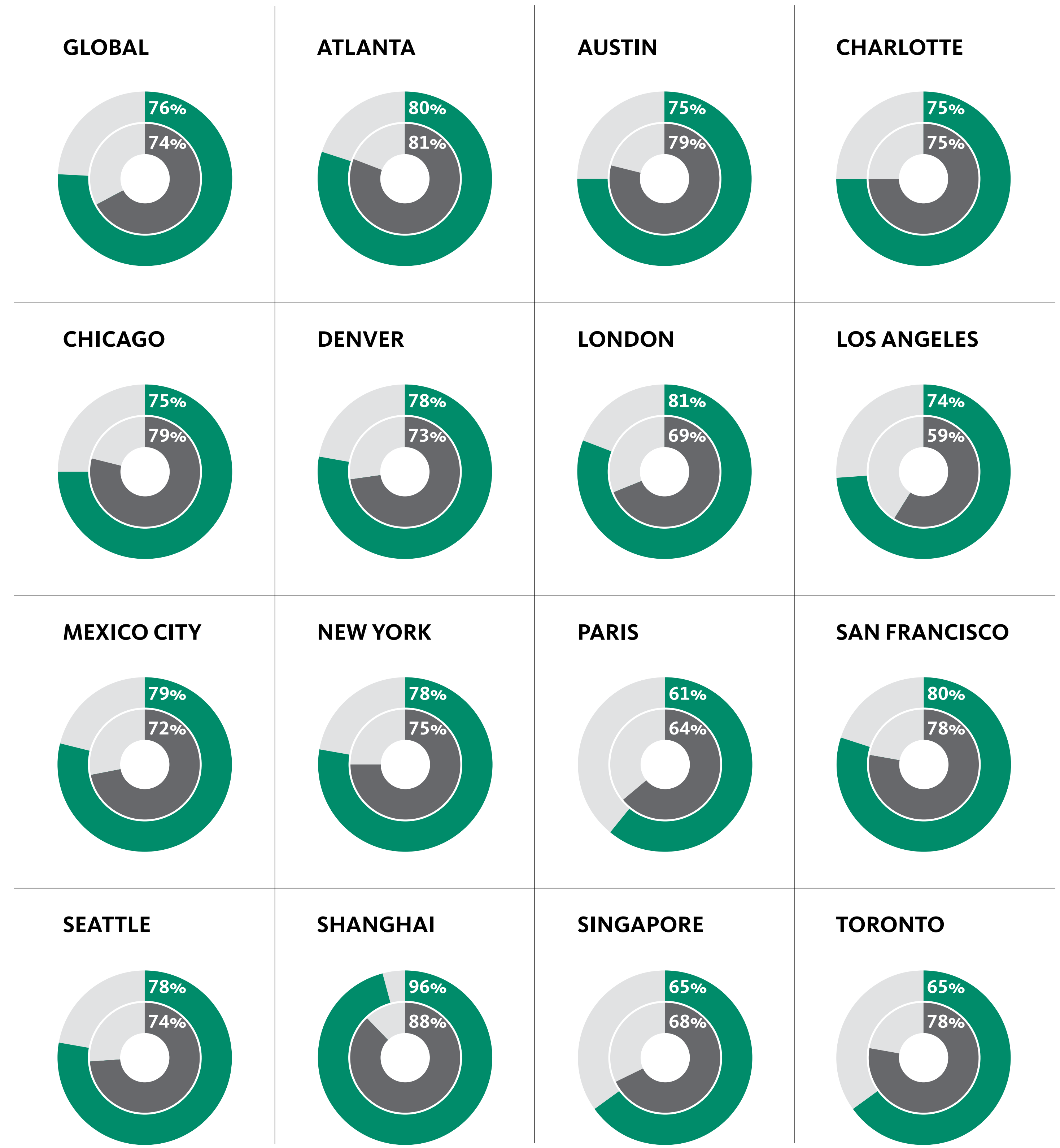
I am satisfied with my current living situation.

Percentage of respondents who agree with the statement.



My city offers a great experience.

Percentage of respondents who agree with the statement.



Methodology

Two anonymous, panel-based surveys focused on the future of centralized business districts were conducted online from September 7 to October 15, 2021 and from May 1 to June 18, 2023. The 2021 survey included 7,500 urban residents across 15 cities and the 2023 survey included 26,000 urban residents across 53 cities. Respondents were required to live within the city administrative boundaries, with the exception of Los Angeles—where residents were required to live within the county administrative boundaries. Respondents were demographically diverse across gender, age (18+), income, and education levels. This report focuses on the 15 cities included in both surveys: Atlanta, Austin, Charlotte, Chicago, Denver, London, Los Angeles, Mexico City, New York, Paris, San Francisco, Seattle, Shanghai, Singapore, and Toronto.

We recognize and acknowledge cultural response bias, or the substantial and systematic differences observed in response styles that happen between countries, regions, and cultural groups. There are at least three types of cultural bias observed in responses to quantitative/attitudinal survey questions: acquiescence (a tendency to agree with what is being asked in the survey), middling (a tendency towards neutrality), and nay-saying (a tendency to disagree with what is being asked in the survey). We are continually learning about/applying new strategies to improve the survey instrument and our analytical approaches to mitigate for these biases in future studies.

Sample Descriptions

2021

Generation	
28%	Baby Boomer + Silent Generation
24%	Gen X
34%	Millennial
14%	Gen Z

Gender	
42%	Male
57%	Female
1%	Other

Ability to work hybrid	
59%	Yes
41%	No

Highest education level	
1%	Less than secondary/ high school
14%	Secondary/high school
22%	Some college/junior college/technical School
39%	University
24%	Higher than university

Housing type	
53%	Single-family
46%	Multifamily
1%	Other

Rent/own	
39%	Rent
61%	Own

Self-reported income group	
26%	Lower income group
31%	Lower middle income group
37%	Upper middle income group
6%	Upper income group

2023

Generation	
20%	Baby Boomer + Silent Generation
29%	Gen X
33%	Millennial
18%	Gen Z

Gender	
44%	Male
55%	Female
1%	Other

Ability to work hybrid	
79%	Yes
21%	No

Highest education level	
3%	Less than secondary/ high school
23%	Secondary/high school
15%	Some college/junior college/technical School
40%	University
19%	Higher than university

Housing type	
56%	Single-family
41%	Multifamily
3%	Other

Rent/own	
39%	Rent
61%	Own

Self-reported income group	
30%	Lower income group
25%	Lower middle income group
39%	Upper middle income group
6%	Upper income group

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The Gensler Research Institute is a collaborative network of researchers focused on a common goal: to generate new knowledge and develop a deeper understanding of the connection between design, business, and the human experience. Through a combination of global and local research grants, and external partnerships, we seek insights focused on solving the world's most pressing challenges. We are committed to unlocking new solutions and strategies that will define the future of design.

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