

An aerial view of a city skyline at dusk, featuring prominent skyscrapers like The Shard and the Gherkin. The scene is overlaid with a network of glowing blue and white lines and nodes, suggesting a digital or data-driven theme. The sky is a mix of orange and grey tones.

COVID Pulse Survey

Hatch Urban Solutions
September 2020

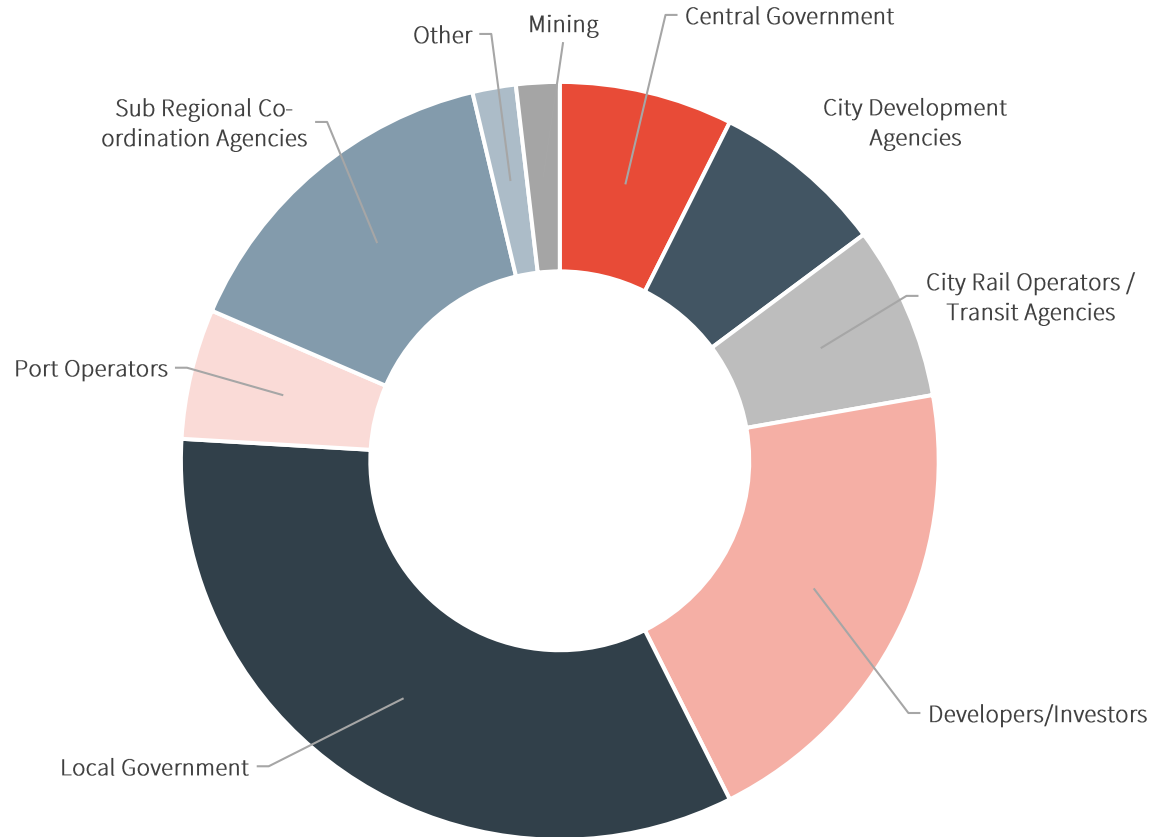
HATCH

COVID Pulse Survey Overview

- 8 questions covering impact, response, and recovery
- Administered in June and July 2020 to past, current, and prospective clients
- 54 organizations interviewed across the US, Canada, South Africa, and UK
- Interviewed municipalities, city agencies, developers/investors, transit agencies/operators, central/federal government agencies, port authorities/operators, mining companies, local/economic development agencies

While the impact has been deep, there is reason to be optimistic about a post-COVID-19 world.

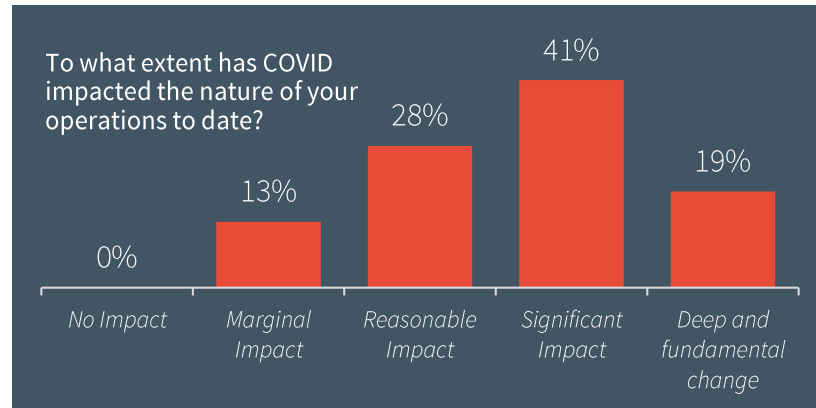
Overview of Organisations Surveyed



IMPACT:

Significant initial impact, but longer-term confidence

- Flexibility around working remotely, and the trust that accompanied this shift as welcome changes
- **25%** of organizations said there would need to be a **‘very significant adjustment’** to their longer-term ambitions (mostly public sector)



“Lots [of impact] in the beginning, but has shifted now to a lower level now everyone is familiar with protocols and technology”

Developer / Investor - USA

“No decrease in workload and people can work remotely. The City needed to develop digital systems and this was a GOOD change to push them into the 21st century”

Local Government - USA

“The entire business model is being reviewed. A plan for alternate revenue is important”

Transit Agency – South Africa

RESPONSE:

Accelerated digital adoption, positive shifts in organizational culture, and new and enhanced ways of working

- Digital technologies have become ubiquitous and are empowering its people to improve productivity and make faster, better decisions
- Greater trust amongst teams and organizations have embraced flexibility as strength
- Created new workflows to improve staff engagement and have seen an increase in productivity

“Accelerated digital transformation and an enhanced empathy with employees. We’re now developing new workflows to improve staff engagement and productivity”

Transit Agency – South Africa

“Our move to e-commerce has been accelerated, probably by 3-5 years”

Developer/Investor - Canada

“We’ve come to recognize the efficiencies that accompany working from home. Post-COVID, we will be retooling our approach to the workplace”

Developer/Investor - Canada

RECALIBRATION:

Optimism with a lens of business sustainability and resiliency

- **80%** of organizations thought it would be at least a year or more before things were **back to 'normal'**
- Average recovery time to something resembling normal operations: **2.5 years**
- **9%** of organizations thought they would never be back to 'normal'
- Recovery with a focus on diversity and equality, particularly amongst organizations located in the U.S

“Strategic aims not affected. But what we need to do to achieve it has changed. COVID has laid bare existing stresses in the area - a need to build back better. More resilience is now needed than before.”

Sub-Regional Co-ordination Agency - UK

“A drop off in passenger and cargo volumes challenges the traditional business model of the development zone. New resiliency strategies become important”

City Development Agency - South Africa

“Value of sustainability and resilience has been tested in new and different ways, and will be at the forefront of all conversations over the next several years.”

Local Government - USA