TALENT ATTRACTION
IN THE AGE OF REMOTE WORK
AGENDA

▸ Introduction
▸ National Trends
▸ Remote Work
▸ The Broadband Challenge
▸ Case Studies
INTRODUCTION
Committed to holistic thinking and sustainable development.

We design strategies that support your community’s vision for the future.
NATIONAL TRENDS
THE REALITIES WE CAN’T ESCAPE

PANDEMIC
ECONOMIC CRISIS
CLIMATE CHANGE
SOCIAL UNREST
COVID-19 HAS CHANGED HOW WE...

WORK  TRAVEL  LEARN  CONSUME
REMOTE WORK
Who are remote workers?

We used to *think* they were the lucky few...
THE LOCATION OF DAILY WORK IS EVOLVING WITH THE US ECONOMY

Percent of employed people working from home in the US, 2006-2019

A slow but steady rise in remote work

Source: US Census Bureau, American Community Survey 1-Year Estimates.
Notes: Table B08006, Sex of Workers by Means of Transportation to Work, Workers 16 years and over.
REMOTE WORKERS ARE VOTING WITH THEIR FEET (AND LAPTOPS)

Puget Sound in context of Top 10 and bottom 10 MSAs (of 100 largest) by share of work-from-home population, 2019

**TOP 10 & BOTTOM 10 MSAs (OF 100 LARGEST) BY SHARE OF REMOTE WORKERS, 2019**

<table>
<thead>
<tr>
<th>Location</th>
<th>Share (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Austin, TX</td>
<td>10.5</td>
</tr>
<tr>
<td>Raleigh, NC</td>
<td>10.2</td>
</tr>
<tr>
<td>Denver, CO</td>
<td>9.1</td>
</tr>
<tr>
<td>Atlanta, GA</td>
<td>8.8</td>
</tr>
<tr>
<td>Tampa, FL</td>
<td>8.6</td>
</tr>
<tr>
<td>North Port-Sarasota-Bradenton, FL</td>
<td>8.4</td>
</tr>
<tr>
<td>Cape Coral-Fort Myers, FL</td>
<td>8.3</td>
</tr>
<tr>
<td>Charlotte, NC</td>
<td>8.0</td>
</tr>
<tr>
<td>Portland, OR</td>
<td>8.0</td>
</tr>
<tr>
<td>Colorado Springs, CO</td>
<td>8.0</td>
</tr>
<tr>
<td>Puget Sound Region, WA</td>
<td>6.4</td>
</tr>
<tr>
<td><strong>US</strong></td>
<td><strong>5.7</strong></td>
</tr>
<tr>
<td><strong>Top 10</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Bottom 10</strong></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Location</th>
<th>Share (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lakeland-Winter Haven, FL</td>
<td>3.9</td>
</tr>
<tr>
<td>Augusta, GA</td>
<td>3.9</td>
</tr>
<tr>
<td>Memphis, TN</td>
<td>3.6</td>
</tr>
<tr>
<td>Columbia, SC</td>
<td>3.6</td>
</tr>
<tr>
<td>Buffalo, NY</td>
<td>3.5</td>
</tr>
<tr>
<td>Baton Rouge, LA</td>
<td>3.5</td>
</tr>
<tr>
<td>Bakersfield, CA</td>
<td>3.5</td>
</tr>
<tr>
<td>Wichita, KS</td>
<td>3.3</td>
</tr>
<tr>
<td>Toledo, OH</td>
<td>3.2</td>
</tr>
<tr>
<td>El Paso, TX</td>
<td>2.8</td>
</tr>
</tbody>
</table>

Source: US Census Bureau, American Community Survey 1-Year Estimates.
Notes: Table B08006, Sex of Workers by Means of Transportation to Work, Workers 16 years and over. Puget Sound Region is shown as the CSA (combined statistical area) that includes the Seattle-Tacoma MSA, Kitsap County, and other surrounding counties.
SMALLER CITIES ARE REMOTE WORKER MAGNETS TOO…

Small metro areas ranked by share of work-from-home population, 2019

<table>
<thead>
<tr>
<th>City</th>
<th>Share of Remote Workers 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Boulder, CO</td>
<td>13.7%</td>
</tr>
<tr>
<td>Bend, OR</td>
<td>11.9%</td>
</tr>
<tr>
<td>Charlottesville, VA</td>
<td>11.1%</td>
</tr>
<tr>
<td>Prescott Valley-Prescott, AZ</td>
<td>10.4%</td>
</tr>
<tr>
<td>Fort Collins, CO</td>
<td>10.1%</td>
</tr>
<tr>
<td>Wilmington, NC</td>
<td>10.0%</td>
</tr>
<tr>
<td>Asheville, NC</td>
<td>9.4%</td>
</tr>
<tr>
<td>Santa Fe, NM</td>
<td>9.0%</td>
</tr>
<tr>
<td>San Luis Obispo, CA</td>
<td>8.8%</td>
</tr>
<tr>
<td>Grand Junction, CO</td>
<td>8.8%</td>
</tr>
<tr>
<td>US</td>
<td>5.7%</td>
</tr>
</tbody>
</table>

Source: US Census Bureau, American Community Survey 1-Year Estimates.
Notes: Table B08006, Sex of Workers by Means of Transportation to Work, Workers 16 years and over. Excludes MSAs with a margin of error above 2.5%.
Then, the pandemic made WFH a reality for tens of millions...
...if our employees are in a role and situation that enables them to work from home and they want to continue to do so forever, we will make that happen.

-Twitter spokesperson
In an anonymous survey of 4,400 Bay Area tech workers, two-thirds of respondents said they would consider leaving the region permanently if allowed to work from home.
The dramatic events of 2020 have challenged us to **reexamine** and **rethink** every aspect of our business and many of the assumptions of the past.

-Eric Artz, president and CEO, REI
EXECUTIVES AND WORKERS EMBRACE REMOTE WORK MODELS

72% of office workers would like to work remotely at least two days a week.

PERCENT OF OFFICE EMPLOYEES EXECUTIVES ANTICIPATED WILL WORK REMOTELY AT LEAST ONE DAY PER WEEK

<table>
<thead>
<tr>
<th></th>
<th>Few (0-29%)</th>
<th>Many (30-59%)</th>
<th>Most (60-100%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Before COVID-19</td>
<td>36%</td>
<td>25%</td>
<td>39%</td>
</tr>
<tr>
<td>During COVID-19</td>
<td>21%</td>
<td>77%</td>
<td></td>
</tr>
<tr>
<td>After COVID-19</td>
<td>11%</td>
<td>34%</td>
<td>55%</td>
</tr>
</tbody>
</table>

Note: PwC surveyed 120 US company executives and 1,200 US office workers between May 29 and June 4, 2020, to see how effective remote work has been.
RIPPLE EFFECTS OF REMOTE WORK

- Commercial office construction and leasing
- Transportation
- Urban design
  - Parking
  - Residential
  - Green space
- Demographic shifts
  - Urban
  - Suburban
  - University towns
The last 10 years were the **decade of downtown.**
Will the next 10 be the **decade of the suburbs**?
REMOTE WORK FUELS A SHIFT TO THE SUBURBS

RENTAL APARTMENTS VACANCY RATES, Q1 2018 to Q3 2020

Downtown apartments vs. Suburban apartments

Sources: CoStar Group; Wall Street Journal.
NOT EVERYONE CAN WORK FROM HOME

- Less than one in five Black workers and roughly one in six Hispanic workers work from home.
- Higher-wage workers are six times as likely to be able to work from home as lower-wage workers.
- Workers in leisure and hospitality are least able to work from home.
- Workers with children must balance childcare with their careers.

# RACE & ETHNICITY MIX IN REMOTE JOB OCCUPATIONS IN THE US

<table>
<thead>
<tr>
<th>Race/Ethnicity</th>
<th>All Jobs</th>
<th>Remote Jobs</th>
<th>Remote Work Differential (+/-)</th>
</tr>
</thead>
<tbody>
<tr>
<td>White</td>
<td>61.6%</td>
<td>72.1%</td>
<td>+10.5%</td>
</tr>
<tr>
<td>Hispanic</td>
<td>17.7%</td>
<td>11.9%</td>
<td>-5.9%</td>
</tr>
<tr>
<td>Black</td>
<td>12.0%</td>
<td>7.8%</td>
<td>-4.1%</td>
</tr>
<tr>
<td>Asian</td>
<td>6.2%</td>
<td>5.7%</td>
<td>-0.5%</td>
</tr>
</tbody>
</table>

Source: US Census Bureau, American Community Survey 2019, 1-Year, Tables B08301, B08105B, B08105D, B08105H, B08105I.
Source: White as defined here excludes those of Hispanic descent.
WHAT IS THE VALUE OF REMOTE WORKERS TO YOUR ECONOMY?
Having remote workers in your community provides several economic benefits...

- Solve critical workforce needs for your employers
- Purchase or rent homes in your city
- Spend money at local businesses
- Networking & new business creation
- Contribute to placemaking
- New connections outside your region

ONE MORE BENEFIT ... ECONOMIC DIVERSIFICATION
4 THE BROADBAND CHALLENGE
...yeah, but don’t it all run on electricity?

-Farmer near Fredericksburg, TX circa 1998
THE LONDON CHOLERA OUTBREAK OF 1845
RETHINKING INFRASTRUCTURE
HOW WELL DO WE UNDERSTAND BROADBAND?

IT’S COMPLICATED!
PROVIDER CONCERNS

- Fiber Location
- WiFi Access
- Last Mile Connectivity
- Curb to Residence

CUSTOMER CONCERNS

- Learning Curve
- Equipment Cost
- Speed Cost
The consequences of inaction...

- Stagnant business environment
- Declining tax base
- Continued out-migration
- Poor social outcomes
HOW SHOULD COMMUNITIES RESPOND?

Arrive at a *shared understanding* of the fiber infrastructure and how you access it.

Survey actual broadband access.

Identify current strategies relevant to rural broadband expansion.
How are different communities rethinking workforce attraction in the age of remote work?
Hi, remote workers!
We'll pay you to work from Tulsa.
You're going to love it here.

Tulsa Remote is back and bigger for 2020. We're looking for 250 more remote workers.

You're looking for something new.
We're looking for great people to join the Tulsa community.

WE'VE GOT A LOT TO SHARE:

$10,000 Cash
Free Desk Space
Exclusive Perks & Events
Welcoming Community
Visit and see what it's like to work and live in San Diego.
New regional talent attraction website & employer toolkit highlight the region’s outdoor recreation opportunities, arts and culture, housing options, and career opportunities with personal stories and vibrant visuals.
CITY OF RICHMOND, VA
Strategic plan (in progress)

- Focused on **equitable economic growth** and greater opportunities for all residents:

- Embark on a full-scale broadband initiative—*the Richmond Public Telecommunications Infrastructure Initiative (RPTI)*—that ensures internet access to every residence in the city of Richmond.

- Launch a remote worker attraction and retention initiative—*RemoteRVA*—to make Richmond a destination of choice for remote workers in the Boston-New York-Washington-Richmond corridor.