



RISE OF THE REMOTE WORKERS

AGENDA

1. Introduction
2. Workforce Trends
3. Rise of the Remote Workers
4. Four Big Questions About Remote Workers



1

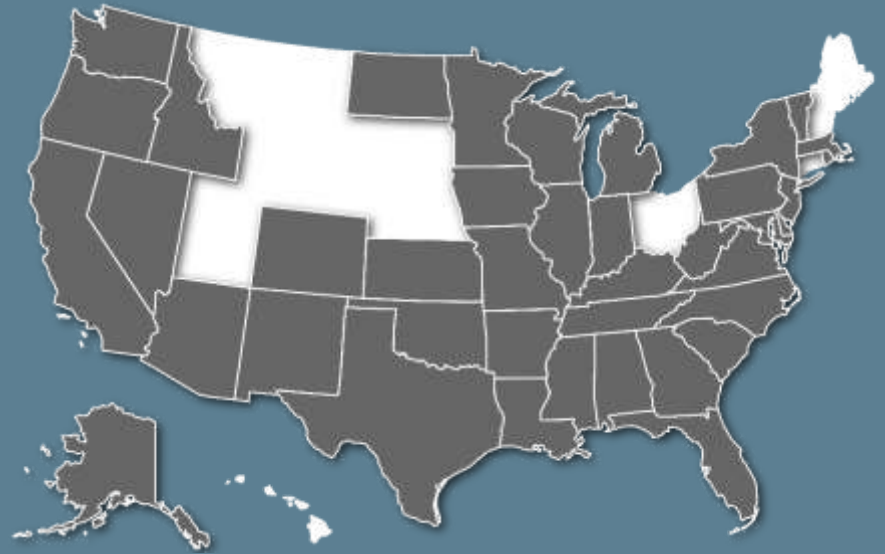
INTRODUCTION

THEORY INTO PRACTICE

we design strategies that will
support your community's
vision for the future

TIP STRATEGIES

Founded in 1995, we have over 24 years of experience in over 300 communities across 40 states, and 5 countries.



Four principals with a total staff of 15.

Committed to holistic thinking & sustainable development.

Austin, Seattle, and Boston offices with global reach.

OUR TEAM



Tom Stellman
CEO/Founder



Tracye McDaniel
President



Jon Roberts
Managing Partner



Jeff Marcell
Principal



Alex Cooke
Senior VP



John Karras
Senior Consultant



Elizabeth Scott
Consultant



Jenn Todd
Consultant



Jaclyn Le
Consultant



Brent McElreath
Senior Analyst



Karen Beard
Senior Analyst



Evan Johnston
Analyst

TIP Strategies lives and works in Washington

One office and 13 clients since 2004





2

WORKFORCE TRENDS

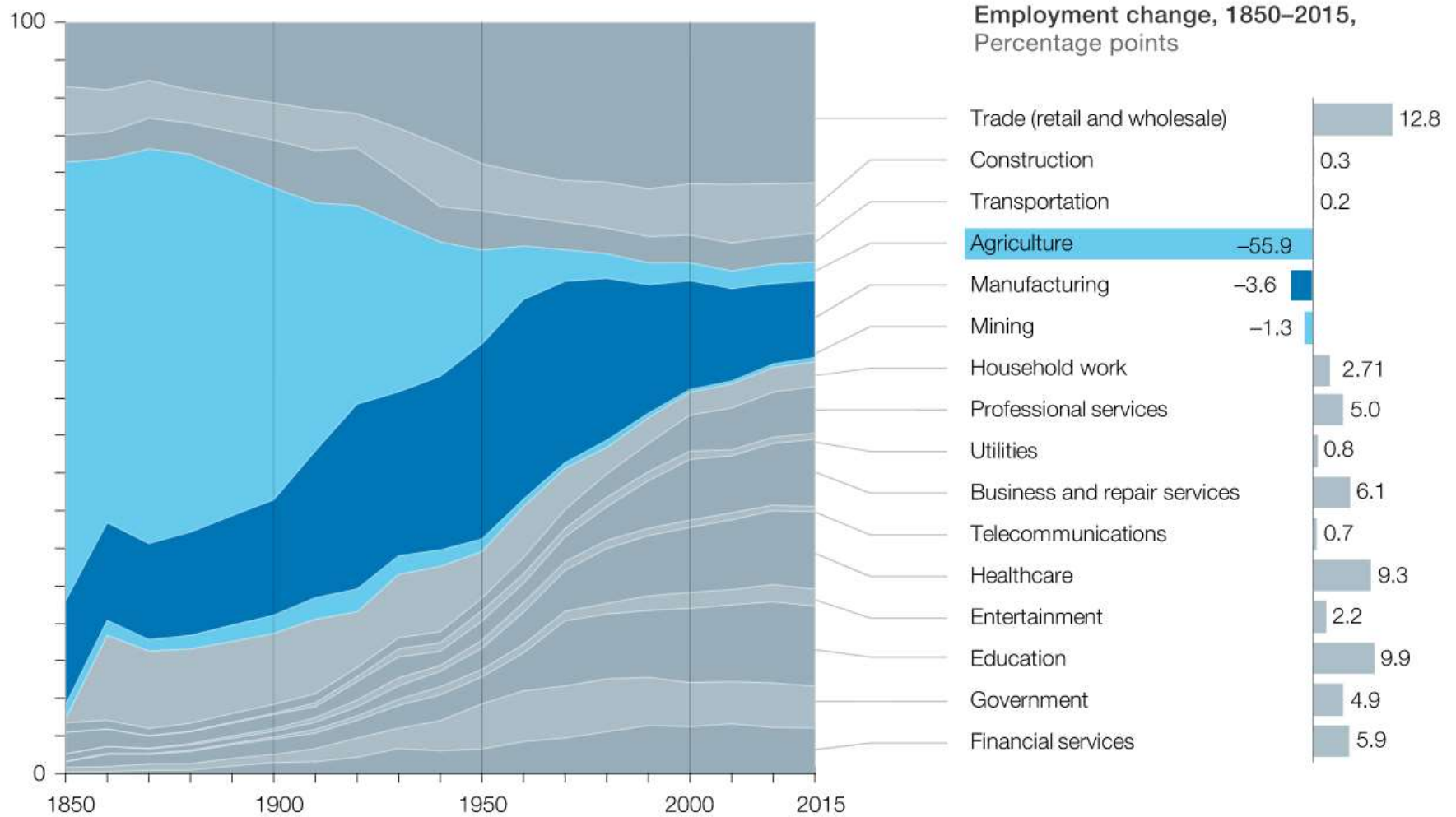
Once upon a time, this is
what work looked like...





Historical shifts due to technology

Share of total employment by sector in the US, 1850-2015 (% of jobs)



Source: IPUMS USA 2017; US Bureau of Labor Statistics; McKinsey Global Institute Analysis.

Then, this is what work
started to look like...

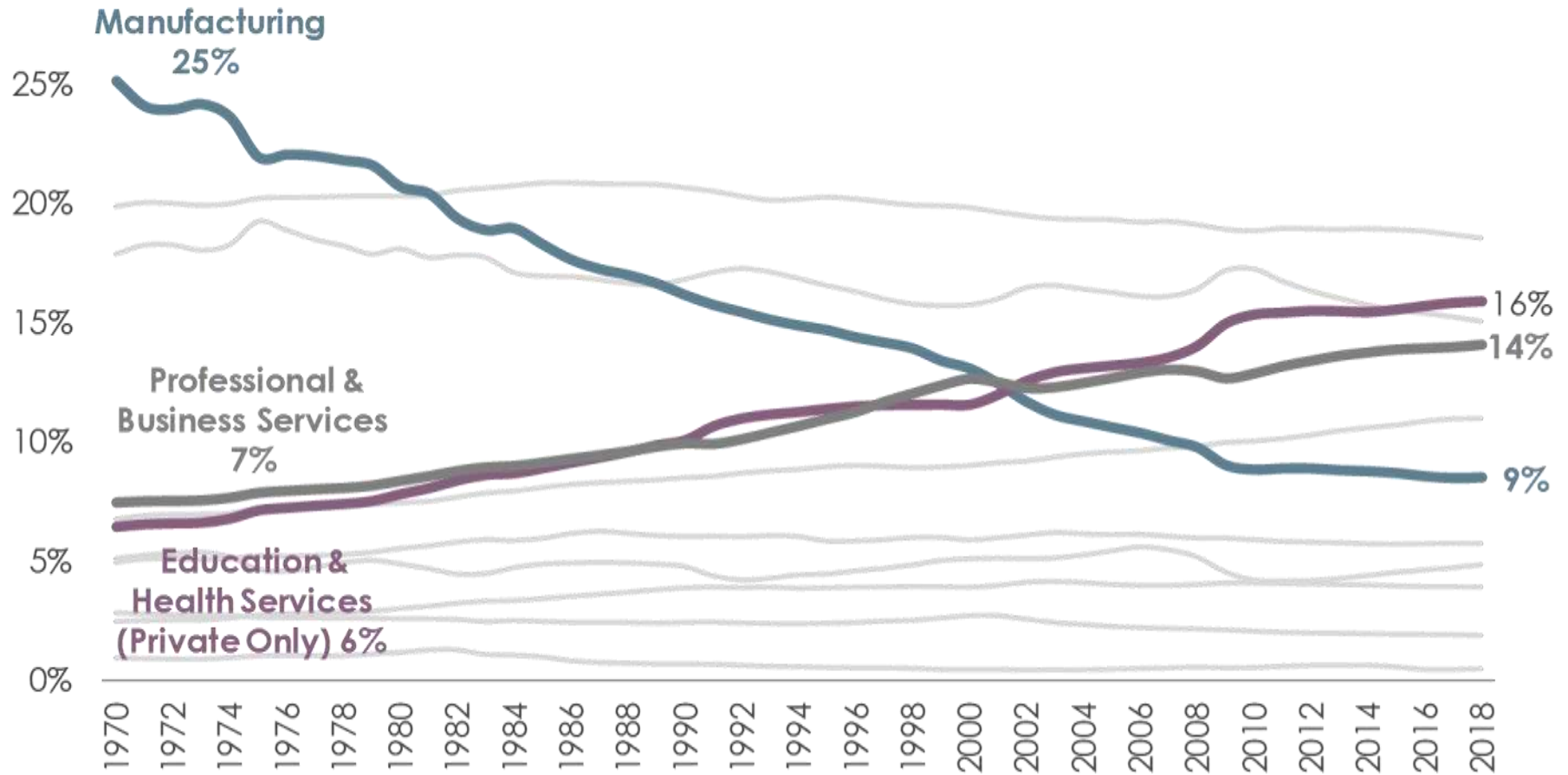




Structural economic change

SHARE OF NONFARM EMPLOYMENT

Annual average employment for selected sectors, 1970-2017

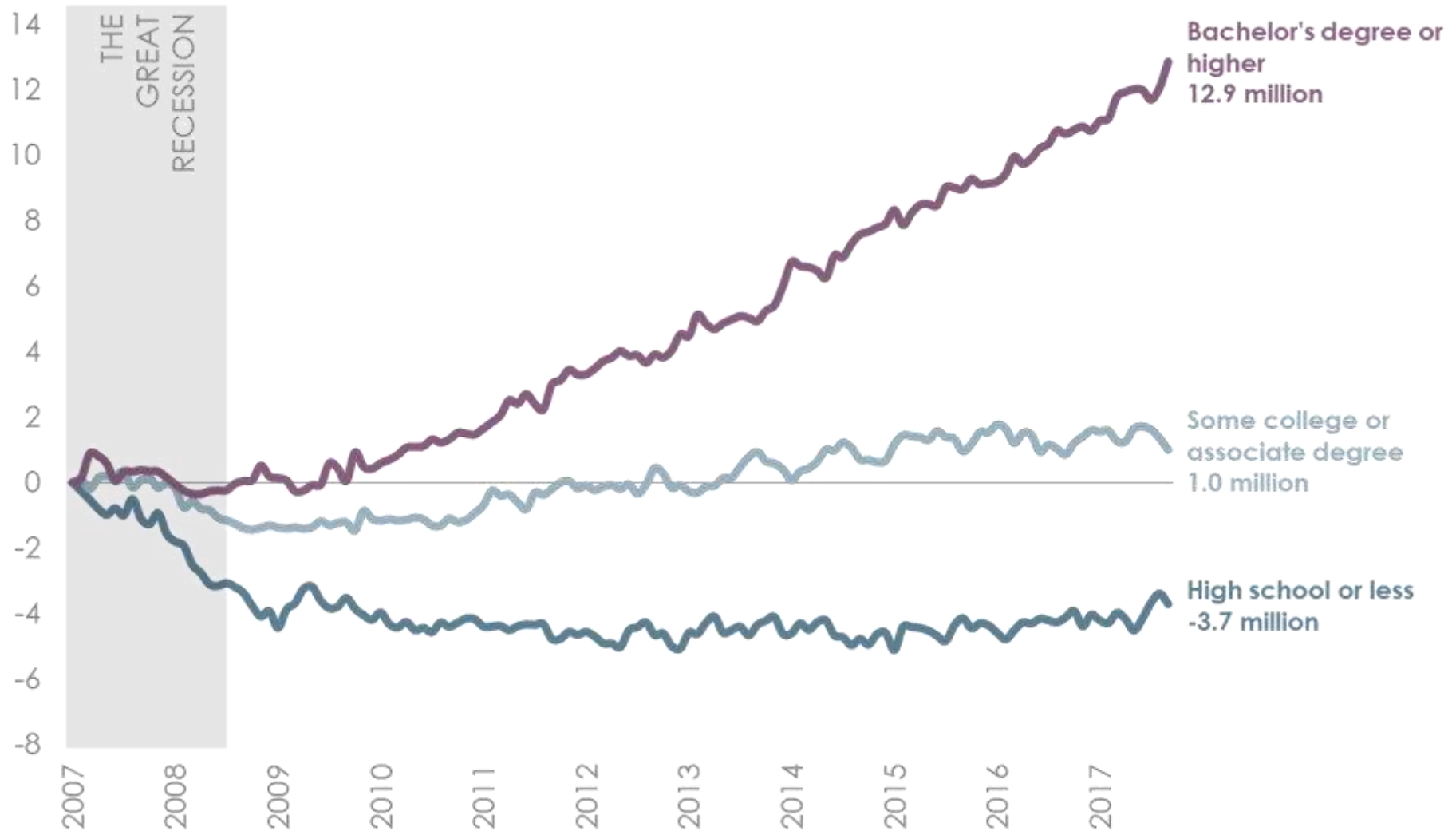


Sources: U.S. Bureau of Labor Statistics, Current Employment Statistics (total nonfarm employment, not seasonally adjusted).

Note: Industry classifications have changed over the decades. The grouping of broad sectors in this chart is the closest possible match to consistent definitions.

Higher skills, higher demand

Cumulative change in employment (millions) since December 2007



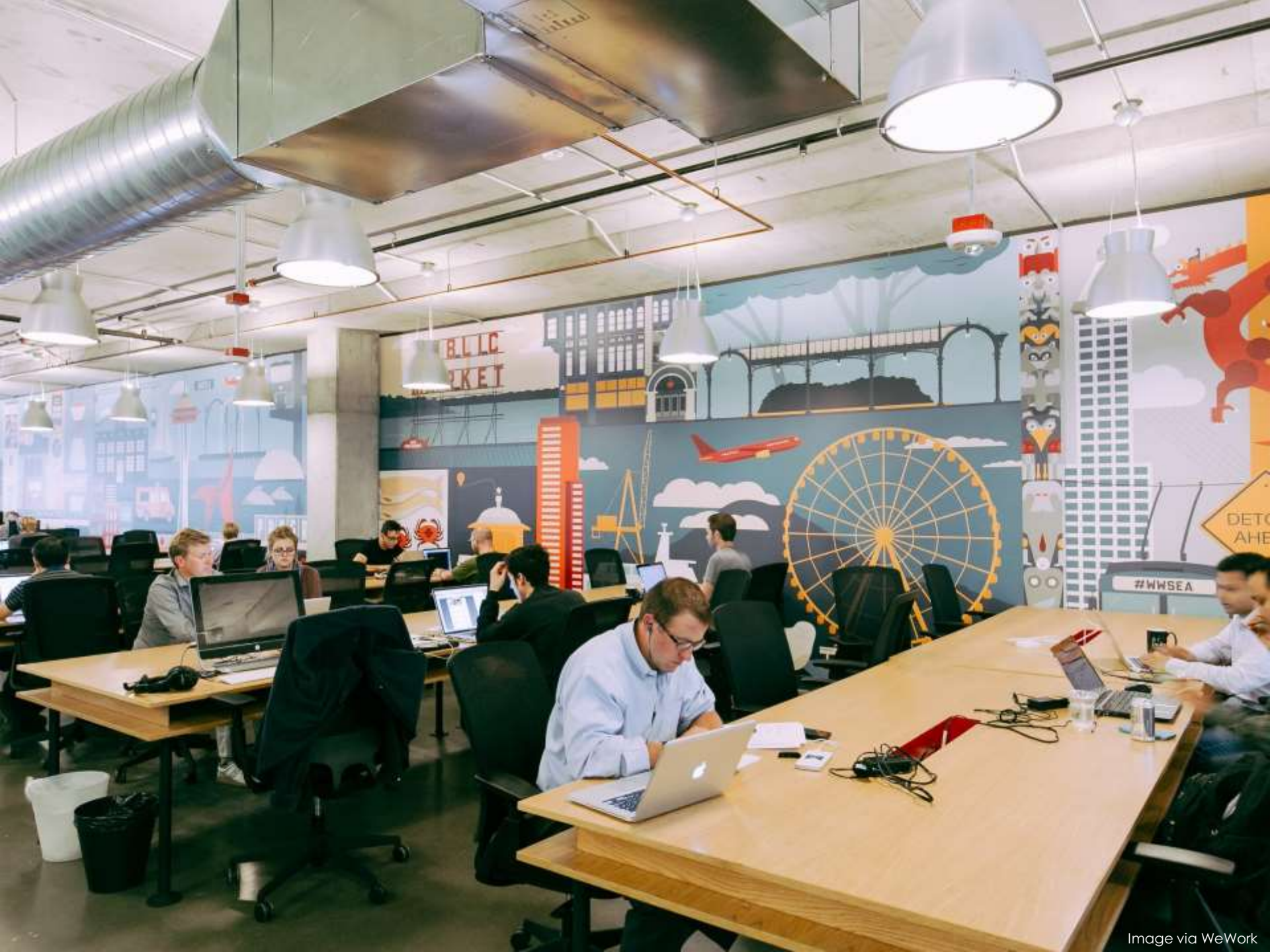
Source: US Bureau of Labor Statistics, Household Survey (Current Population Survey); National Bureau of Economic Research.

Note: Employment is seasonally adjusted and includes all workers age 25 and older. The National Bureau of Economic Research (NBER) officially dates the Great Recession as December 2007 through June 2009 (19 months total).

Now, and in the future,
this is what work is going
to look like...







3

RISE OF THE REMOTE WORKERS



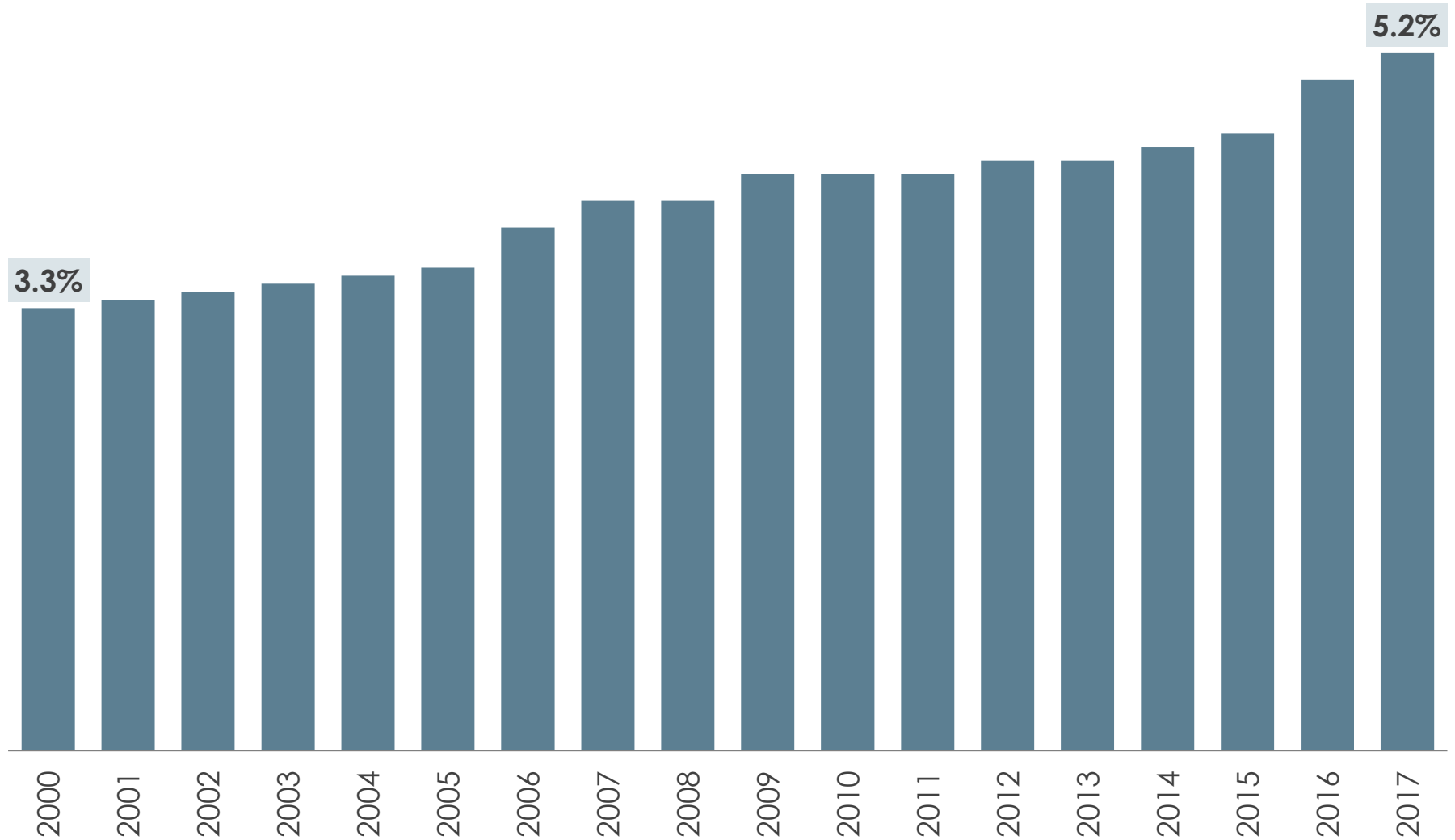
REMOTE WORKERS ARE INCREASING

“Going to work” ain’t what it used to be.

The office, the job, and the work are less tied to a location.

The percent of remote workers is growing

Percent of employed people working remotely in the US, 2000-2017



70 percent of professionals globally work away from the office at least once a week and **53 percent** work remotely at least half the week

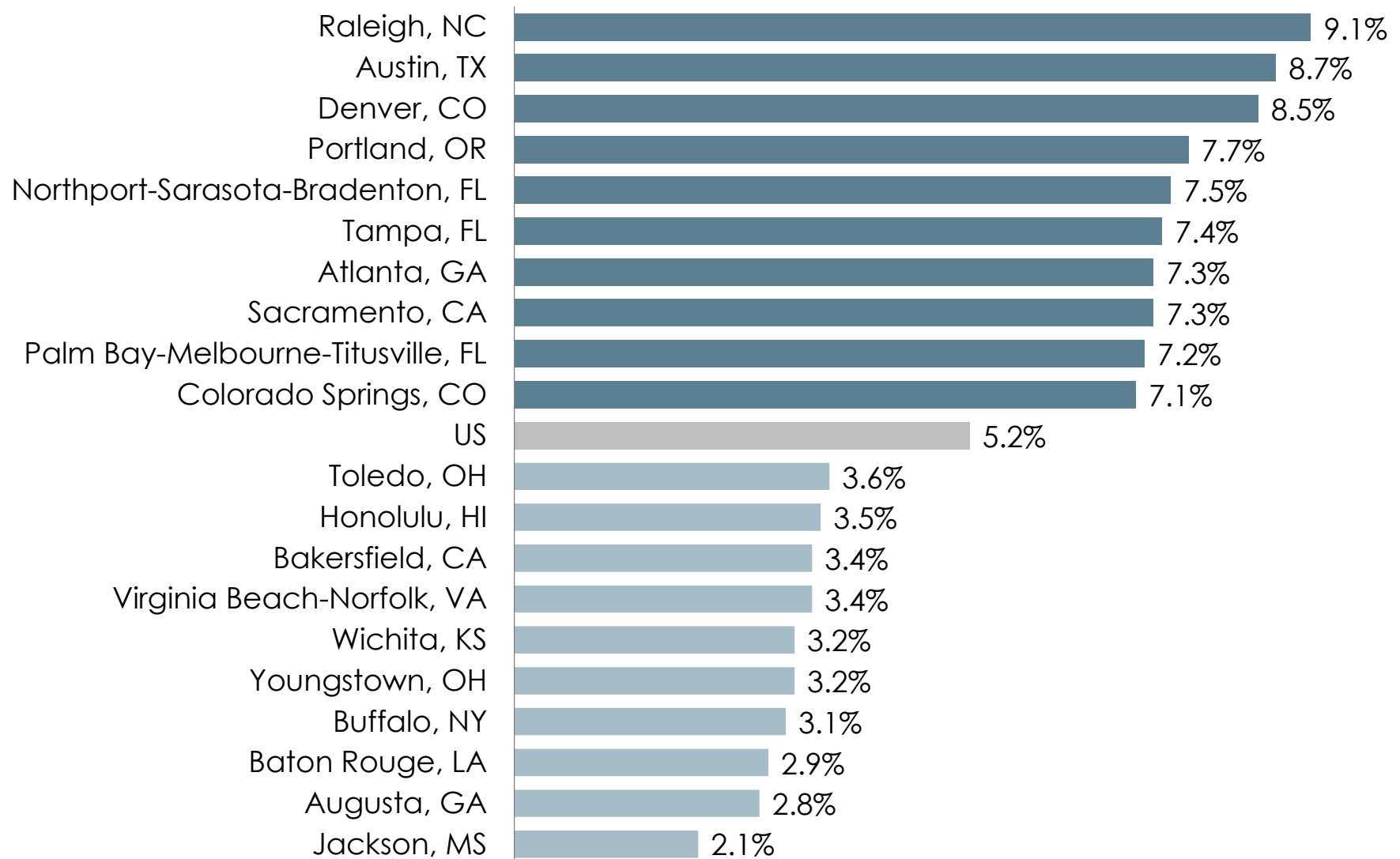
– *IWG (owner of Regus and Spaces) study*

Does geography still matter?

YES!

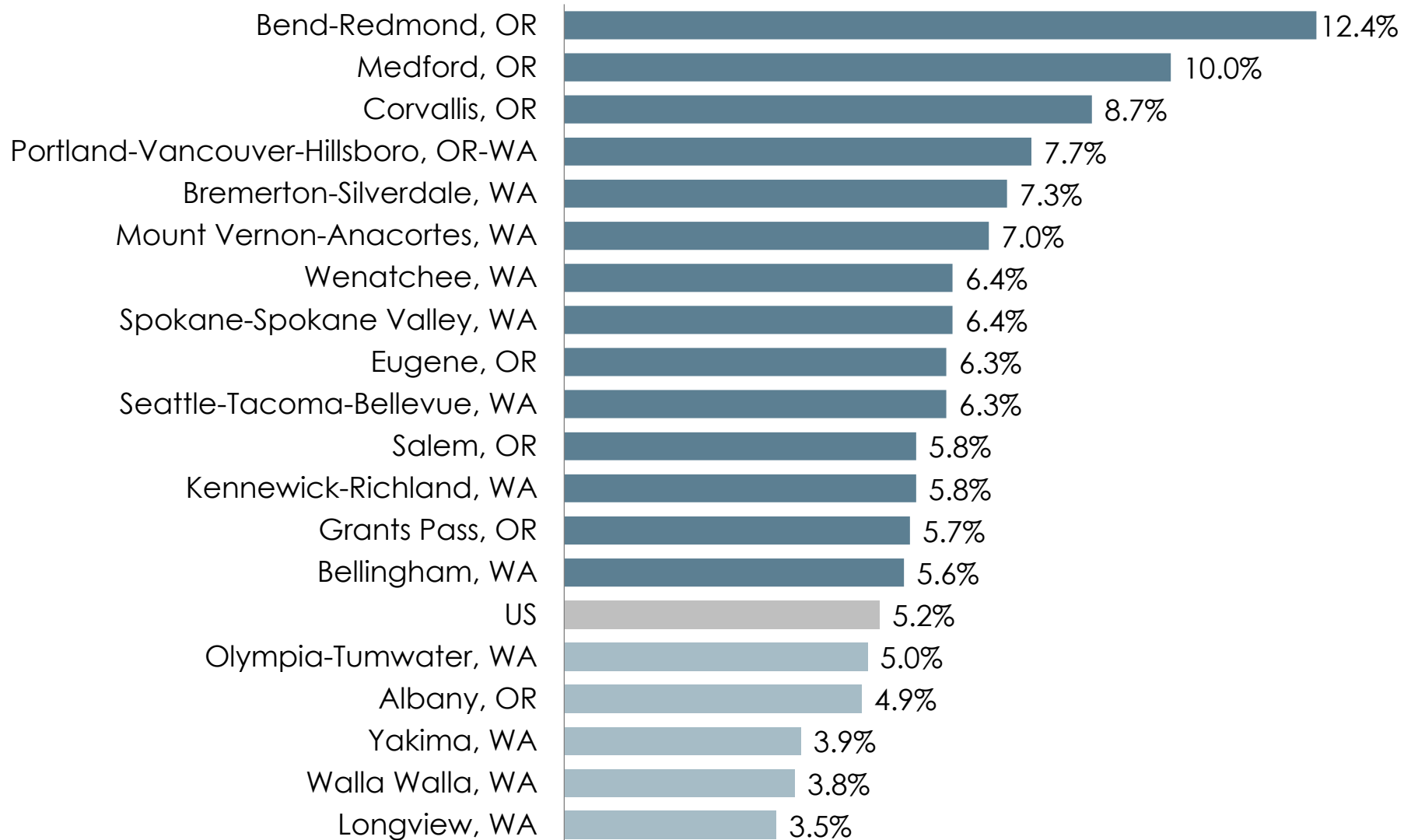
Workers are voting with their feet

Top 10 and bottom 10 MSAs (of 100 largest) by share of remote workers, 2017



Remote workers in WA & OR metros

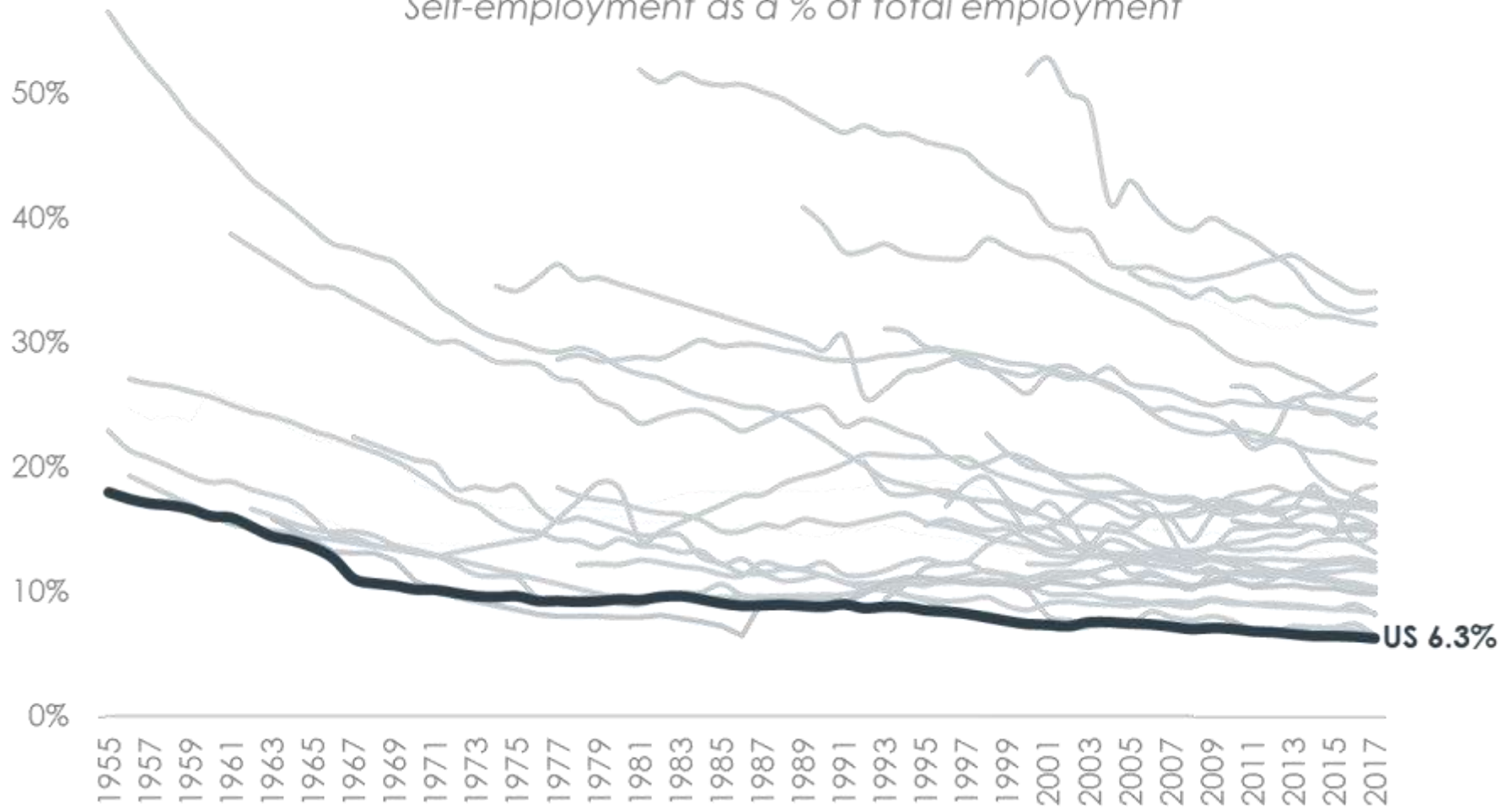
Washington & Oregon MSAs ranked by share of remote workers, 2017



What about the “gig” economy?

Self-employment in the US remains very low

SELF-EMPLOYMENT RATES IN OECD COUNTRIES
Self-employment as a % of total employment



Source: OECD (2018), Self-employment rate (indicator). doi: 10.1787/fb58715e-en (Accessed on 10 December 2018)

Notes: The OECD's self-employment rate is standardized across countries to enhance comparability.

4

FOUR BIG QUESTIONS ABOUT REMOTE WORKERS

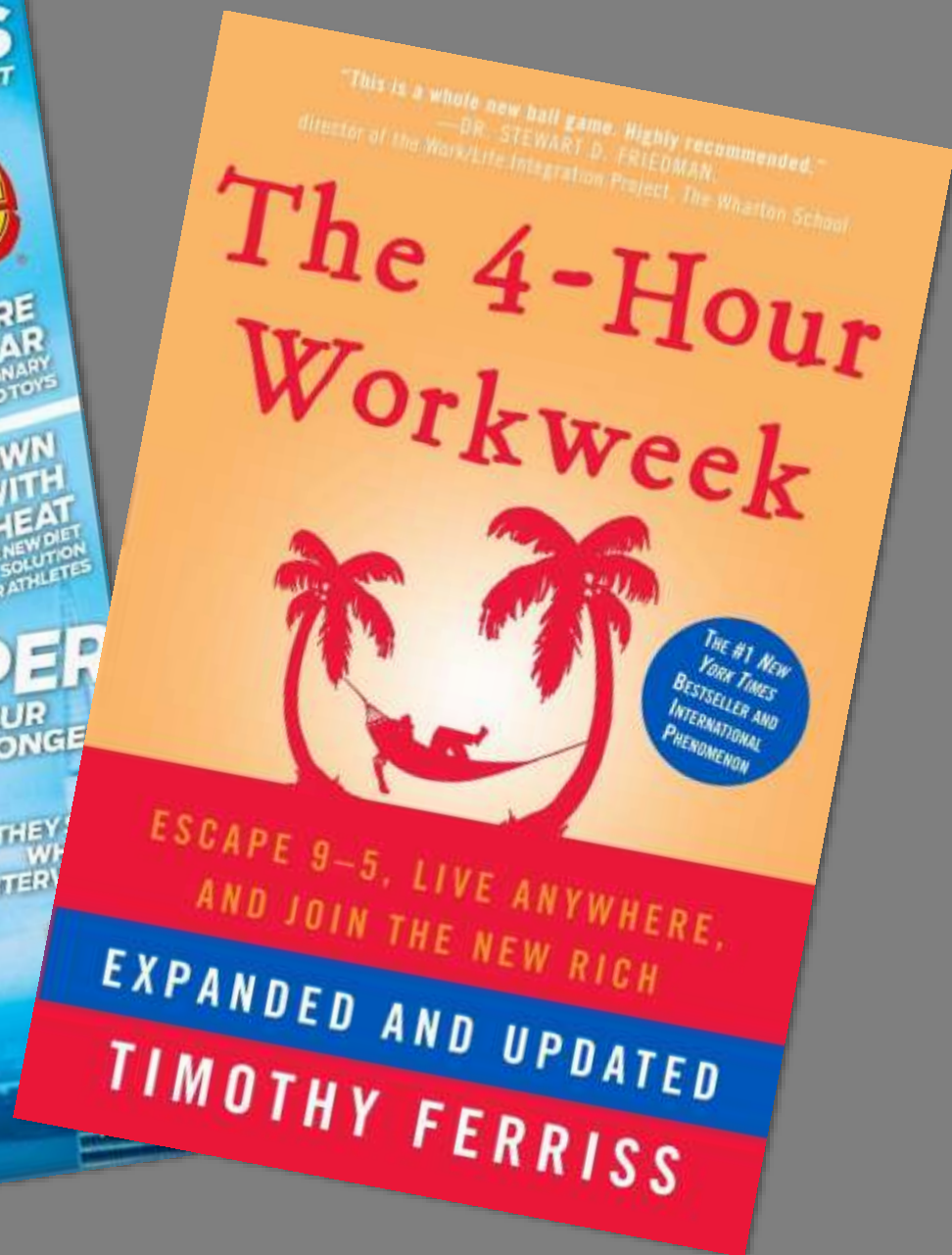
Four big questions about remote workers:

1. Who are they?
2. What's driving their growth?
3. What is the value of remote workers to your economy?
4. How can you make your community a magnet for them?



1. Who are remote workers?

Who we *think* remote
workers are...



Who remote workers *really*
are...

PROFILE OF A REMOTE WORKER

Elizabeth Scott

Position: Consultant

Company: TIP Strategies

Location: Portland, OR

Previous Role:

Business Development Director
with Columbia River EDC

Personal:

Married (to a remote worker)
with 2 kids





2. What factors are driving the growth of remote workers?

Factors driving growth of remote work:

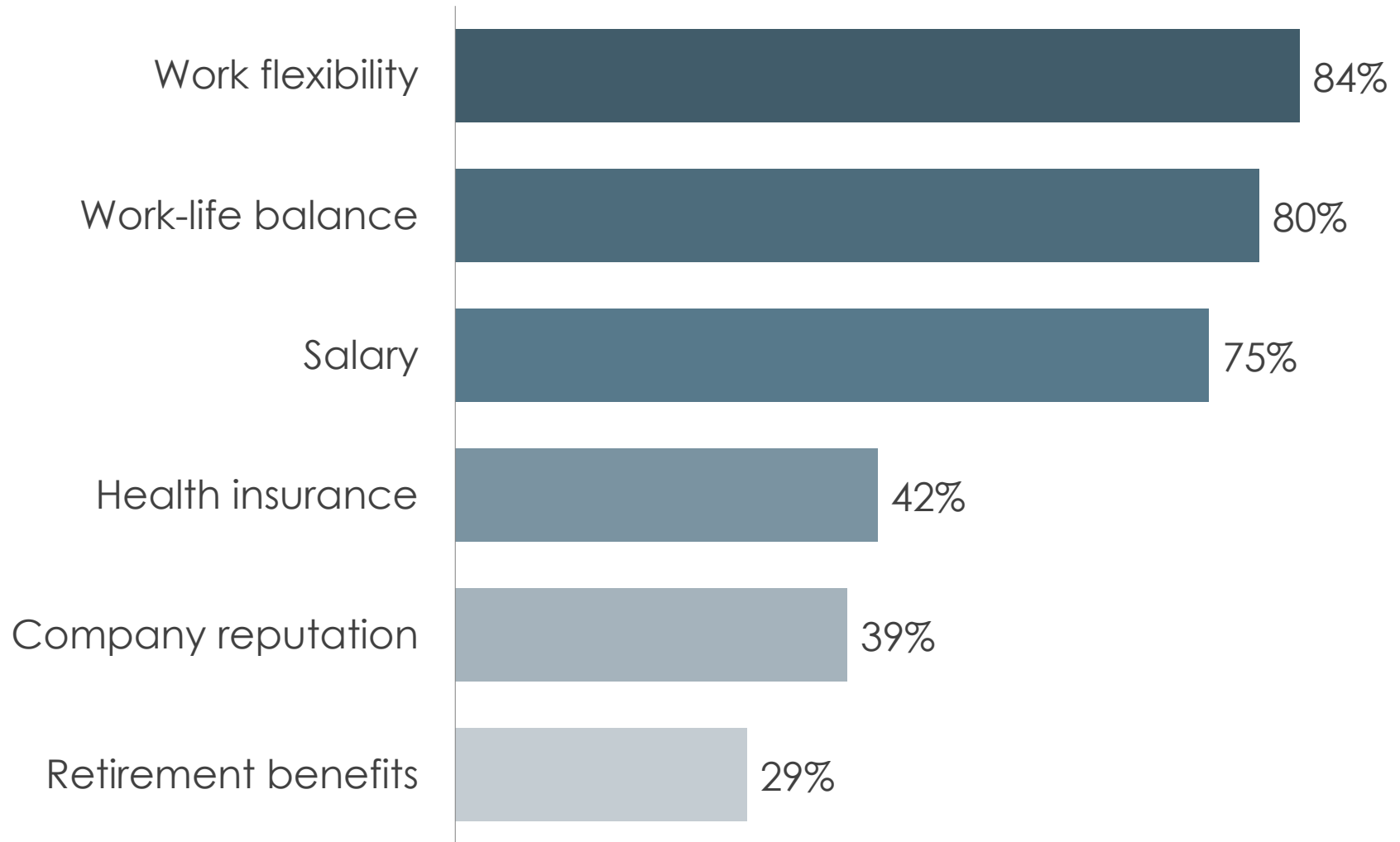
1. It's what **workers** want.
2. It's what **companies** need.
3. New **tech + tools** make it work.

Worker preferences are driving the growth of remote work.

54 percent of employees said managing their **work/life balance** is one of the top 5 things their company can do to help them thrive at work (compared to 40% in 2018 and 26% in 2017)

Source: 2019 Global Talent Trends Study by Mercer. Survey input from 800 business executives, 1,800 HR leaders, and 5,000+ employees across 21 industries and 44 countries.

Parents: Most Important Factors in a Job



90 percent of remote workers plan on working remotely for the rest of their careers.

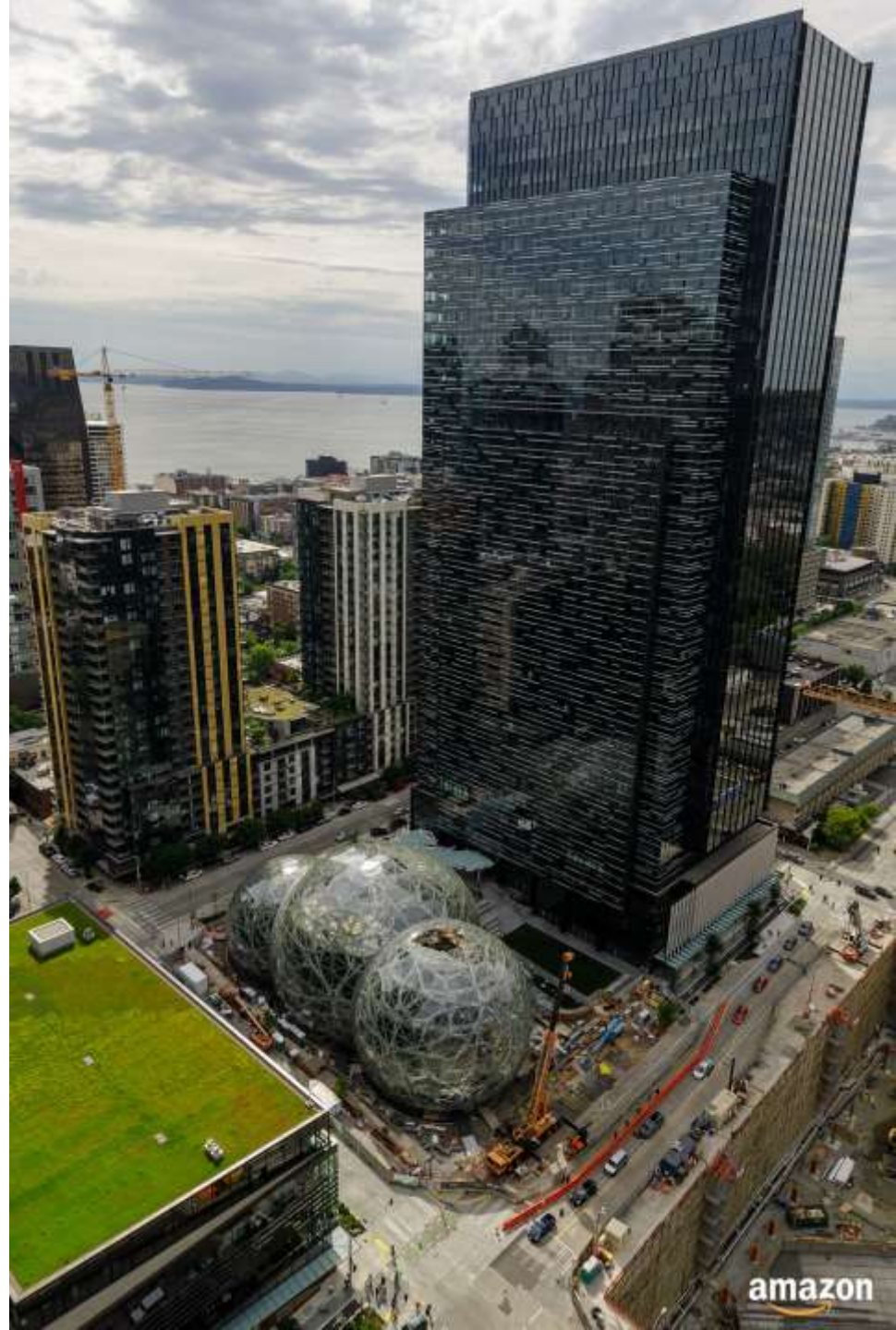
Source: Buffer 2018 State of Remote Work report (sample size of 1,900 freelancers and employees)

Practical business needs are driving the growth of remote work, giving companies a more **flexible** and **distributed** workforce.

DUAL CAMPUSES

Amazon's HQ2 search changed the game.

Companies like Indeed, Facebook, and Vrbo (formerly HomeAway) have dual campuses in Austin.



AUSTIN'S "SECOND DOWNTOWN"

indeed

vrbo



DOWNTOWN AUSTIN

indeed

vrbo





UNCONVENTIONAL WORK SPACES ARE ON THE RISE

Coworking spaces like WeWork are changing the culture of work for millions of workers and entrepreneurs.

New tech + new tools are
enabling the growth of
remote work.



THE REAL STORY...

*Changing dynamics between employers and workers have given rise to **a more flexible & distributed workforce.***



3. What is the value of remote workers to your economy?

What is the value of remote workers to your economy?

Let's start with the easy ones...



Solve critical
workforce
needs.



Purchase or
rent homes in
your city.



Spend money
at local
businesses.

What is the value of remote workers to your economy?

A few more benefits...



Networking &
new business
creation.



Contribute to
placemaking.



New
connections
outside your
region.



4. How can you make your community a magnet for remote workers?

3 places that are attracting
remote workers:

1. Bend, OR
2. Asheville, NC
3. Austin, TX

Bend, OR: Silicon Valley's newest suburb



How does Bend attract remote workers?

- Lots of new coworking space (200k sq. ft.)
- Amenities (outdoor recreation, craft beer)
- New housing options at a decent price
- Nonstop flights to Seattle, San Francisco, Portland, Salt Lake, Denver, Los Angeles
- Networking & supportive culture

28
AUG

Wednesday, August 28, 2019

Remote Worker Wednesday - Happy Hour



Hosted by Andrew J Y. and 2 others

From Bend Remote Worker Meetup

Public group

Are you going? 16 people going



Share:   



Details

BendTECH is hosting a Remote Worker Wednesday Happy Hour every last Wednesday of the month. Come grab some drinks and get to know the remote worker community in Bend!

🕒 Wednesday, August 28, 2019
7:00 PM to 9:00 PM

📍 Riff - Craft Food & Beverage Taproom
555 NW Arizona Ave Suite 30 - Bend,
OR

How to find us
Look for the "Remote Worker Sign In"
sign



Asheville, NC



How does Asheville attract remote workers?

- Amenities (outdoor recreation, craft beer, downtown, events)
- Linking tourism with talent attraction (Biltmore estate, arts + culture, music)
- New nonstop flights: Denver, Washington-Dulles, Dallas-Fort Worth, Philadelphia, New York LaGuardia, Detroit
- Support structures for entrepreneurs & tech workers in target industries (climate data)

Positioning for climate science

AVL 5x5 Vision 2020 Economic Development Strategic Plan: Asheville-Buncombe County Economic Development Coalition

Goal 3: Science & Technology

Leverage Asheville-Buncombe County's science and technology assets. Support efforts to create new industry clusters centered on climate science, adaptability, and digital media/information technology.

Strategy 3.1:

Explore climate and environmental data opportunities for new private sector business growth.

Action:

- To accelerate the growth and build-out of Asheville-Buncombe County's existing climate and environmental data commercialization industry, use the EDC, the CVB, and Tourism Development Authority to **host a “Climate Science & Tech Transfer” conference/summit in Asheville.**
- Invite climate and weather scientists from other federal agencies, researchers from other institutions of higher education, and business professionals involved in climate and weather science.

CLIMATE CON: ASHEVILLE, NC

2018

CLIMATEC[°]N

Business Of Climate Forum / Mar 19-21

Summit For Emerging Climate Leaders / Mar 19

Climate City Experience / Mar 16-25



THE COLLIDER

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CLIMATE
CITY
EXPO

**Exploring Innovative Climate Solutions &
Business Opportunities**



ABOUT ▾ MEMBERSHIP ▾ EVENTS ▾ CONTACT EXPLORE ▾

A mission-driven collaborative focused on solutions for climate change

Offering membership, cowork, office & event space in the heart of downtown Asheville, North Carolina

JOIN US

What the heck is CLIMATE TECH?

1 What is the purpose of the climate solution?

MITIGATION



Limit the pace and magnitude of climate change by reducing greenhouse gas emissions.



ADAPTATION and RESILIENCE



Help prepare humans for the effects of a changing climate.

2 Does the solution...



INCORPORATE or analyze historical climate and weather data, or climate models?



CONTRIBUTE to existing weather and climate datasets?



GENERATE new climate or weather data in a scientifically sound way?

None of the above



3 Is the solution a scalable tech?



Software as a Service



Application Program Interface



Internet of Things



Physical satellites or sensors

None of the above



Congratulations! Your solution classifies as climate tech.

Austin, TX



How does Austin attract remote workers?

- Fastest growing large metro in US
- Emerging global technology hub
- Don't forget about broadband (2nd Google Fiber community after KC)
- Depth & diversity of coworking spaces
- Growth in every direction (from CBD to exurbs) with mixed-use activity centers being the “new normal”

COWORKING SPACES IN SOUTH AUSTIN

South Austin coworking spaces are new to the scene—all established within the past three years—and many offer

unique amenities, such as on-site daycare for children or dogs. Here is a look at the local, neighborhood businesses.

1 ORANGE COWORKING (2015)

The collective is designed to promote human connection and flourishing, founder Shelley Delayne said.

- ★ Personal and professional development \$297+
- 📍 2110 W. Slaughter Lane, Ste. 160, Austin
512-887-4469 | www.orangecoworking.com
- 🕒 Mon.-Fri. 8 a.m.-6 p.m., closed Sat.-Sun. 🏢 6,000 sq. ft.

2 FIBERCOVE (2015)

The business mirrors the design and amenities offered downtown, co-founder Felicity Maxwell said.

- ★ A bar with espresso and beer on tap \$400+
- 📍 1700 S. Lamar Blvd., Ste. 338, Austin
512-596-2683 | www.fibercove.com
- 🕒 Mon.-Fri. 8:30 a.m.-6:30 p.m., closed Sat.-Sun. 🏢 6,700 sq. ft.

3 SENTENTIA VERA CULTURAL HUB (2017)

The bilingual cultural hub is housed in the city's first green building, founder Teresa Carbajal Ravet said.

- ★ English/Spanish translation \$300+
- 📍 4002 Hwy. 290, Dripping Springs
512-633-4327 | <https://sententiavera.com>
- 🕒 Mon.-Thu. 9 a.m.-6 p.m.,
Fri.-Sat. 10 a.m.-4 p.m., closed Sun. 🏢 4,000 sq. ft.

4 THE HIVE (2017)

Austin's first coworking space to offer on-site child care, the business also hosts events, founder Shelly Welser said.

- ★ Supervised child care \$550+
- 📍 10415 Old Manchaca Road, Ste. C, Austin
512-431-0969 | www.hiveaustin.com
- 🕒 Mon.-Fri. 8 a.m.-5 p.m.,
Sat. 9 a.m.-noon, closed Sun. 🏢 2,000 sq. ft.

5 WORK AND WOOF (2018)

The business is Austin's first coworking space to offer an indoor and outdoor dog park, founder Jill Dretzka said.

- ★ Free dog care while owner is on-site \$400+
- 📍 4930 S. Congress Ave., Bldg. A, Austin
512-460-1488 | www.workandwoofatx.com
- 🕒 Mon.-Fri. 7 a.m.-7 p.m.,
Sat.-Sun. 10 a.m.-7 p.m. 🏢 10,000 sq. ft.

6 SCALE UP COCONNECT (2018)

Less focused on technology, the space is for entrepreneurs to grow their businesses, founder Kay McManus said.

- ★ A seminar room that holds 42 people \$297+
- 📍 5716 W. Hwy. 290, Ste. 100, Austin
512-487-5350 | www.scaleupcoconnect.com
- 🕒 Mon.-Sat. 9 a.m.-6 p.m., closed Sun. 🏢 2,100 sq. ft.

KEY

- 📍 Southwest Austin coworking spaces
- 📍 Downtown Austin coworking spaces
- ★ Unique amenity
- 📍 Address and contact information
- 🕒 Hours
- 💰 Starting monthly membership cost
- 🏢 Square feet

7 IMPACT HUB (COMING SOON)

The global chain focuses on making a positive impact in society, marketing manager Mindy Morgan said.

- 📍 440 E. St. Elmo Road, Austin
512-842-6430
www.impacthubaustin.com
- 💰 \$300+



PHOTOS (CLOCKWISE FROM TOP LEFT) ORANGE COWORKING, FIBERCOVE, SENTENTIA VERA CULTURAL HUB, THE HIVE, WORK AND WOOF, SCALE UP COCONNECT, IMPACT HUB

3 places targeting remote workers for talent recruitment:

1. State of Vermont
2. Tulsa, OK
3. Middle of nowhere, Alaska



VERMONT

Aggressive talent attraction

- \$10 K to each remote worker who relocates
- Employer must be located outside Vermont
- Tackles challenge of a small, aging population

Hi, remote workers!

We'll pay you to work from Tulsa.
You're going to love it here.



**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



Low Cost
of Living



Welcoming
Community



GEEKS
IN THE
WOODS

we're on a
mission

TO PIONEER THE
TECH FRONTIER
IN ALASKA



REMEMBER THIS...

*Remote workers are **choosing to live in your community** (or choosing to leave and move someplace else).*



QUESTIONS

THANK YOU



2905 San Gabriel Street
Suite 309
Austin, TX 78705

512.343.9113

www.tipstrategies.com



Why do people choose
to go where they do?

How do you decide where to live?

- Can I afford it?
- Will jobs be available to me?
- What are the education opportunities?
- Will transportation be an issue?
- Is a home available for me?
- How close is it to my family?
- Does it fit my lifestyle? And will I fit in?
- Do I like it?