



TALENT TRENDS & STATE SOCIAL POLICIES: 2023 IMPACT ON BUSINESSES IN THE U.S.

FEBRUARY 2023



METHODOLOGY

This poll was conducted by Morning Consult, on behalf of BSR, between February 21-February 23, 2023 among a sample of 2208 adults. The interviews were conducted online and the data were weighted to approximate a target sample of adults based on age, gender, race, educational attainment, region, gender by age, and race by educational attainment. Results from the full survey have a margin of error of plus or minus 2 percentage points.

KEY FINDINGS

- 1. Social policies are an important consideration for adults when thinking about relocating.** Three-fourths of adults (73%) agree it is important that they understand state-level social policies when considering relocating to a given state. Furthermore, nearly all adults (89%) who accepted a professional opportunity in the past year that required them to relocate to a different state considered social policies in their decision to move. This indicates that employers need to consider state social policies as potential risks and opportunities for their workforce.
- 2. Employed adults agree that companies should respond to social issues.** Nearly three-fourths of employed adults say companies should respond to the lack of federal mandated paid family and medical leave, while two-thirds say companies should respond to gun violence and climate change. Further, half of employed adults say companies should respond to abortion access. Support for companies to respond to and speak out on social issues is especially high among employed Black adults.
- 3. However, companies simply declaring a commitment to promoting social justice is not enough.** Most employed adults agree that if a company declares its commitment to promoting social justice, the company cares about their workers (74%) and customers (74%). Despite this, more than half of employed adults think that the company is more focused on how they appear (56%) and is just trying to attract customers (56%)—especially GenZers and Millennials. Employed adults, especially employed GenZers, employed Millennials, and employed Black

adults, say they would be more likely to work for a company that takes actionable steps to promoting social justice both internally through workplace policies and practices, as well as externally through investments, donations, and advocacy.

AGENDA

TALENT MOBILITY AND RELOCATION
CONSIDERATIONS

SENTIMENT ON SOCIAL POLICIES

EXPECTATIONS FOR COMPANIES

SOCIAL POLICIES AT-A-GLANCE

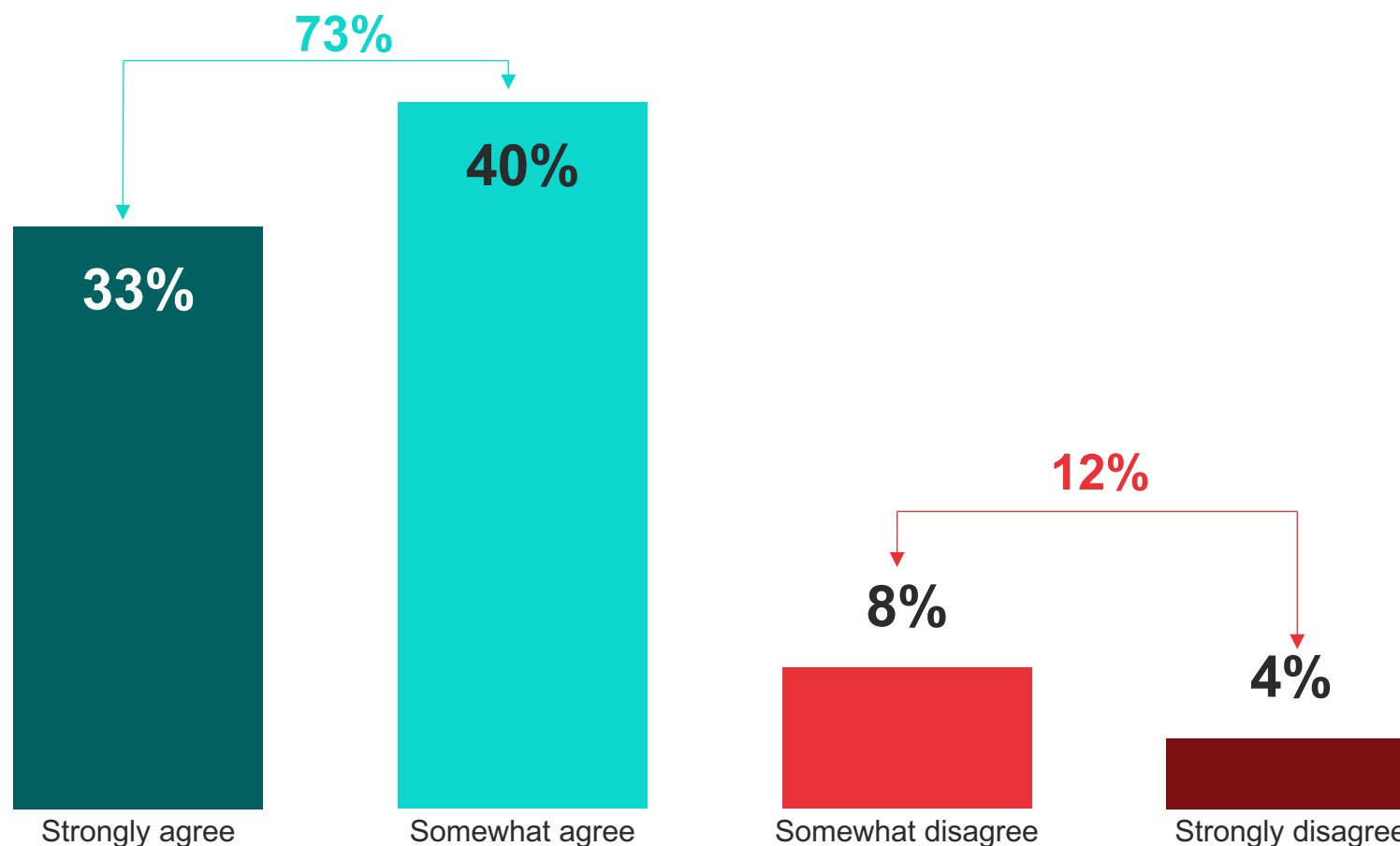
APPENDIX



TALENT MOBILITY AND RELOCATION CONSIDERATIONS

A majority of adults (73%) agree it is important that they understand state-level social policies when considering relocating to a given state.

Do you agree or disagree with the following statement? *It is important for me to understand the social policies specific to a state or locality when considering whether or not to relocate there.*

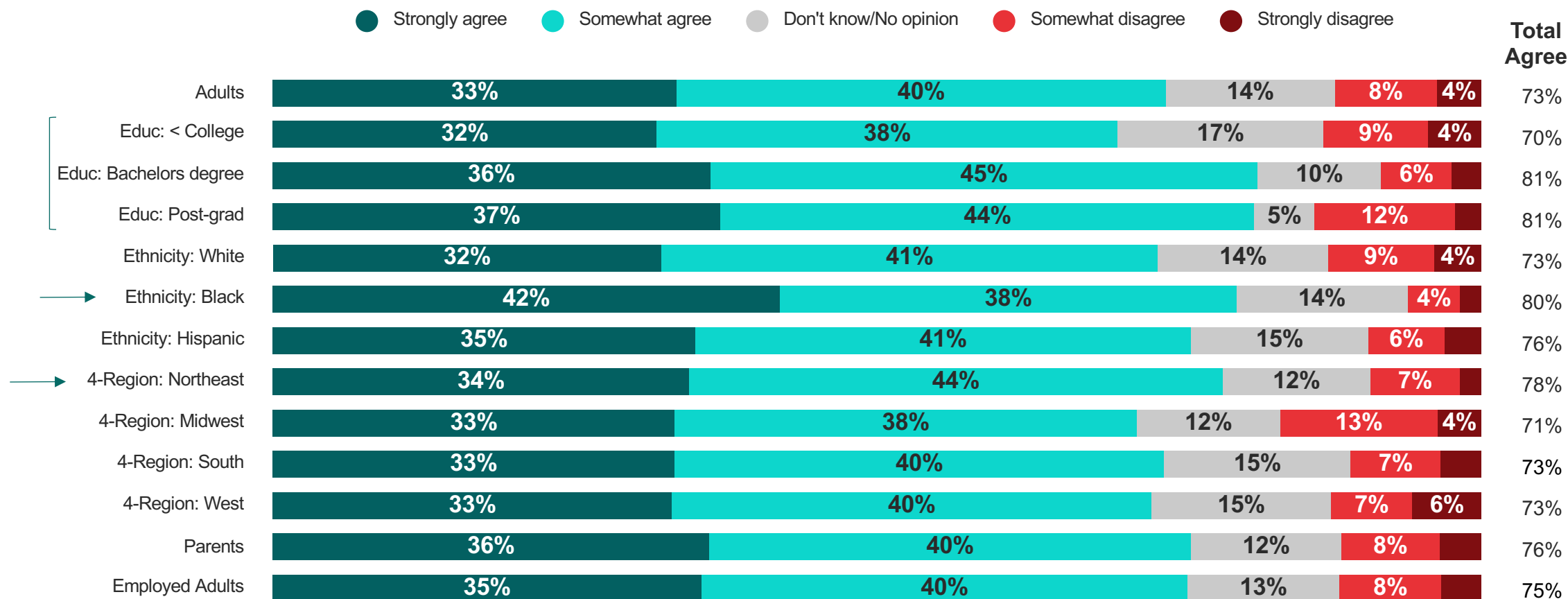


Don't know/No opinion: 14%

TALENT MOBILITY AND RELOCATION CONSIDERATIONS

Adults with at least a Bachelors degree (81%), Black adults (80%), and adults in the Northeast (78%) are especially likely to agree that it is important for them to understand the social policies of the area they are considering relocating to.

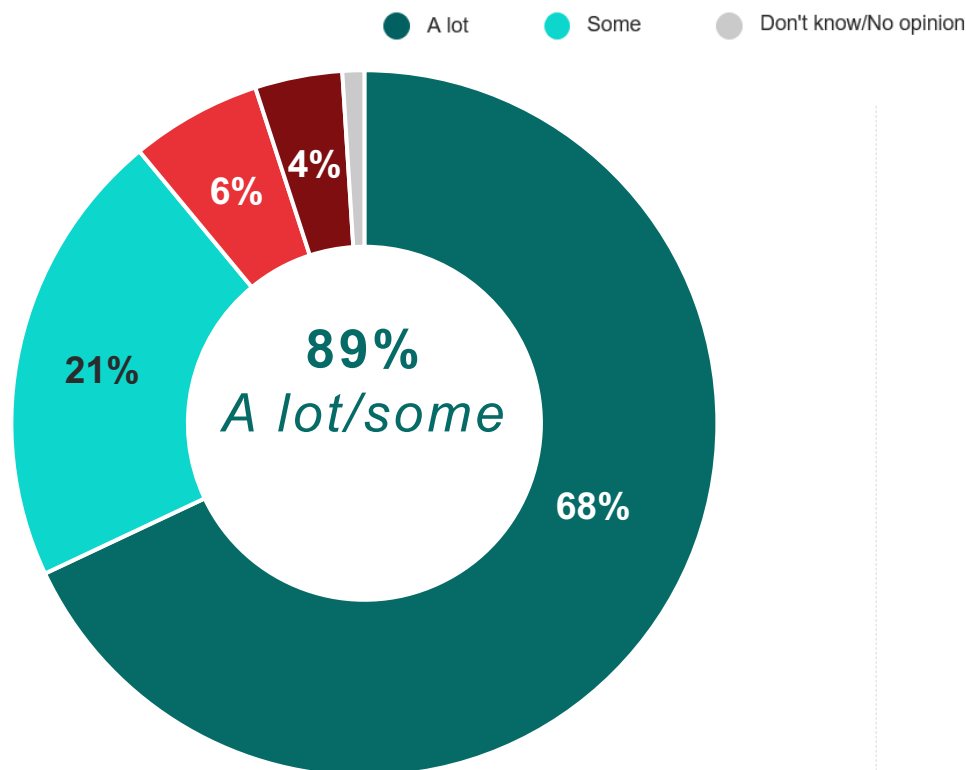
Do you agree or disagree with the following statement? *It is important for me to understand the social policies specific to a state or locality when considering whether or not to relocate there.*



TALENT MOBILITY AND RELOCATION CONSIDERATIONS

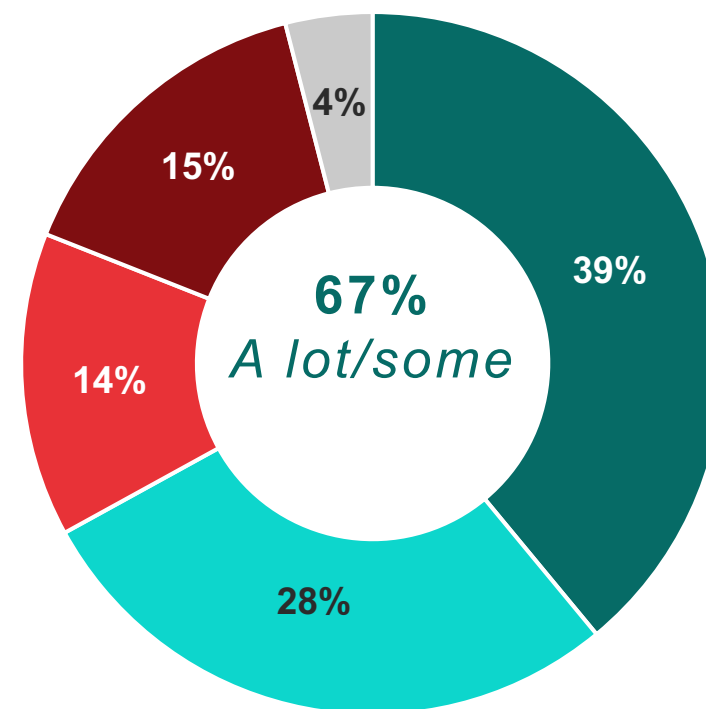
Nearly nine-in-ten (89%) adults who accepted a professional opportunity with relocation say they considered social policies in the state in their decision to relocate. Two-thirds (67%) of adults who declined the role also took social policies into consideration.

In your decision to accept this role, how much did you consider, if at all, social policies (i.e. voting rights, paid family and medical leave, abortion access, etc.) in the state to which you relocated?



ACCEPTED PROFESSIONAL OPPORTUNITY WITH
RELOCATION, n=92

In your decision to decline this role, how much did you consider, if at all, social policies (i.e. voting rights, paid family and medical leave, abortion access, etc.) in the state to which you were intended to relocate?

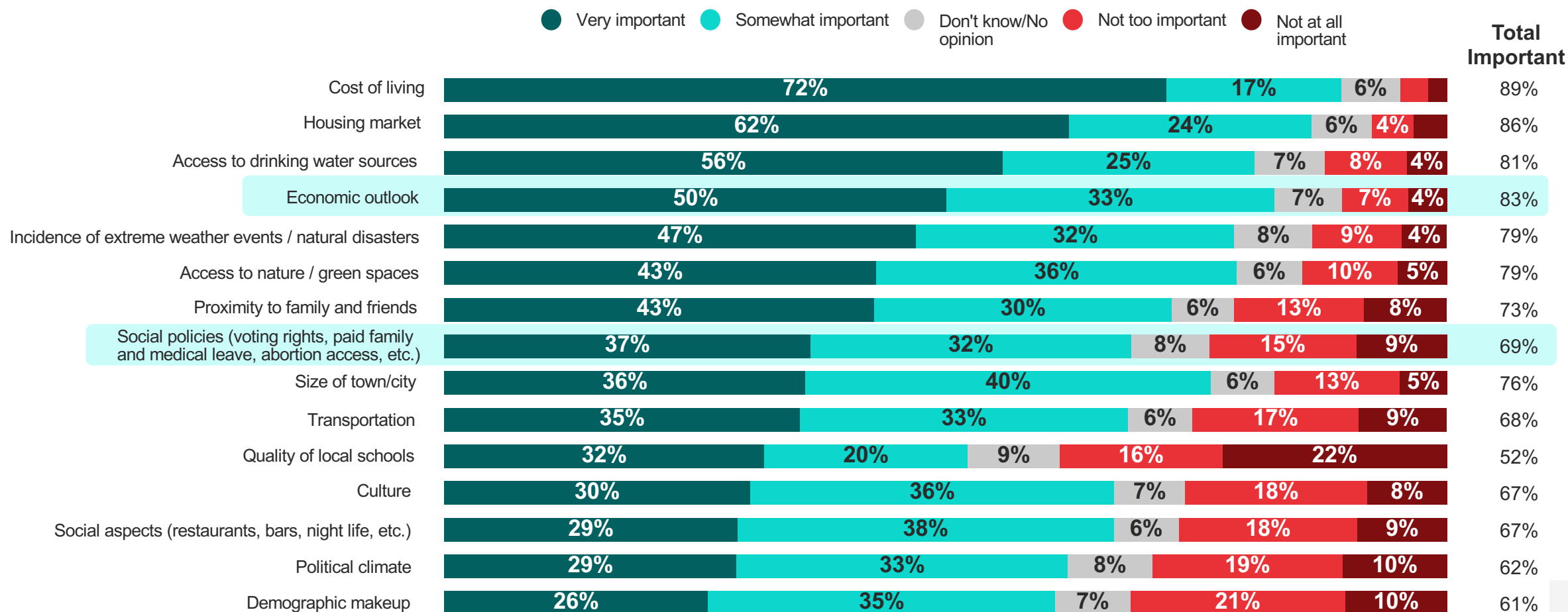


DECLINED PROFESSIONAL OPPORTUNITY WITH
RELOCATION, n=98

TALENT MOBILITY AND RELOCATION CONSIDERATIONS

Seven-in-ten (69%) adults say *social policies* are important to consider when thinking about moving to a different state, including nearly four-in-ten (37%) who consider social policies *very important*. A large majority (83%) also consider *economic outlook* important.

In thinking about moving to a different state, how important, if at all, are each of the following considerations?

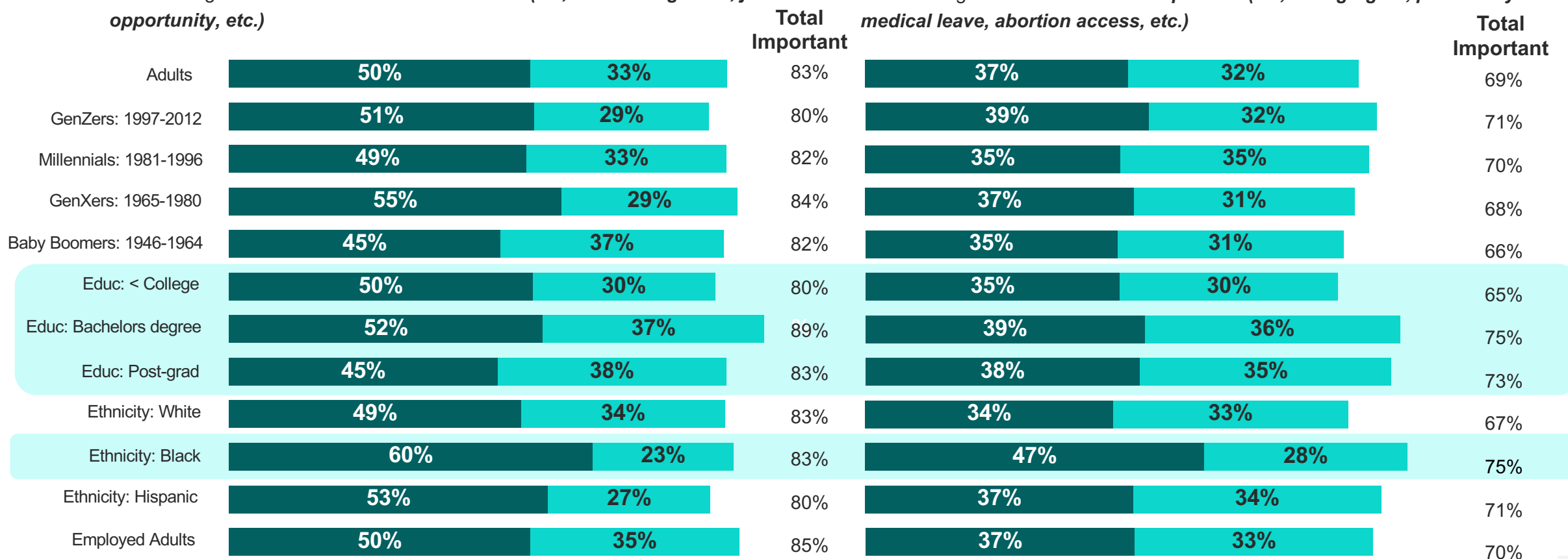


TALENT MOBILITY AND RELOCATION CONSIDERATIONS

Across demographics, at least 80% of adults consider *economic outlook* as important in their decision to move. When considering *social policies*, higher educated adults and Black adults are most likely to consider them important in their decision to move, including nearly half (47%) of Black adults who consider them *very important*.

In thinking about moving to a different state, how important, if at all, are each of the following considerations? **Economic outlook** (i.e., **economic growth, job opportunity, etc.**)

In thinking about moving to a different state, how important, if at all, are each of the following considerations? **Social policies** (i.e., **voting rights, paid family and medical leave, abortion access, etc.**)



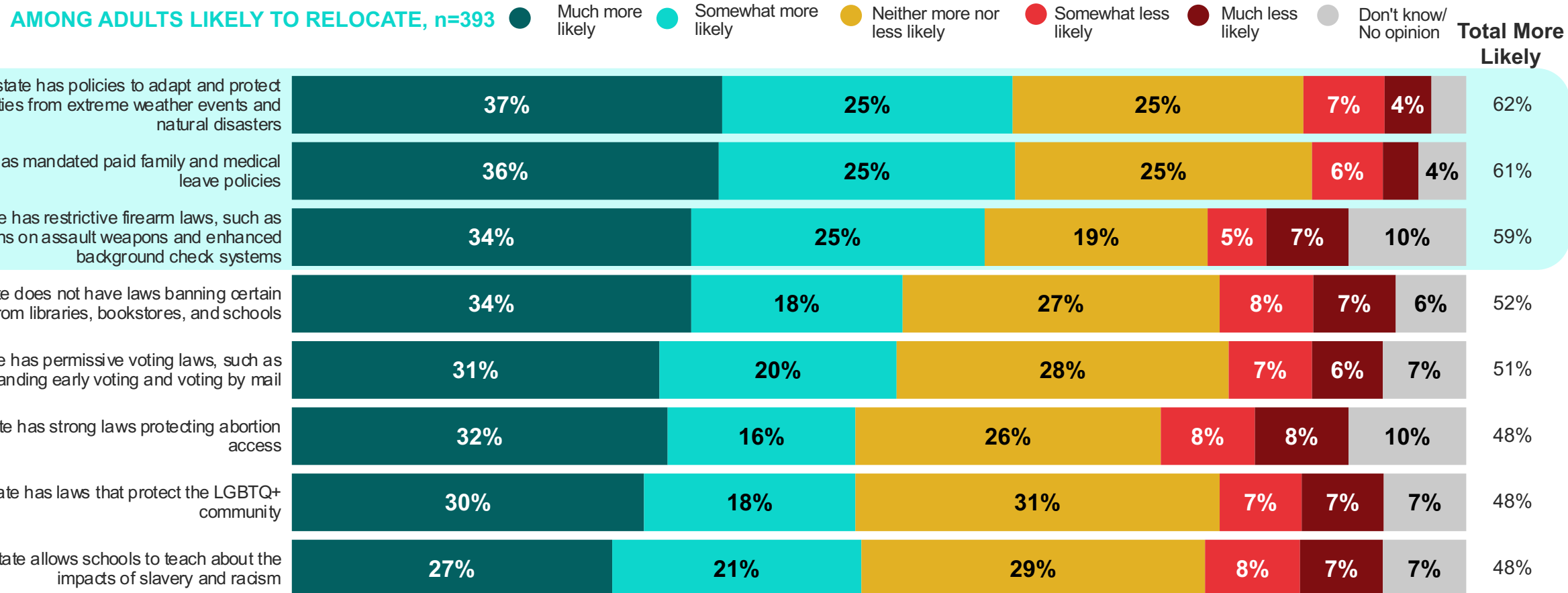
Very important

Somewhat important

TALENT MOBILITY AND RELOCATION CONSIDERATIONS

Adults likely to relocate say they would be most likely to move to a state with policies to address *climate change* (62%), *mandated paid family and medical leave* (61%), and *restrictive firearm laws* (59%).

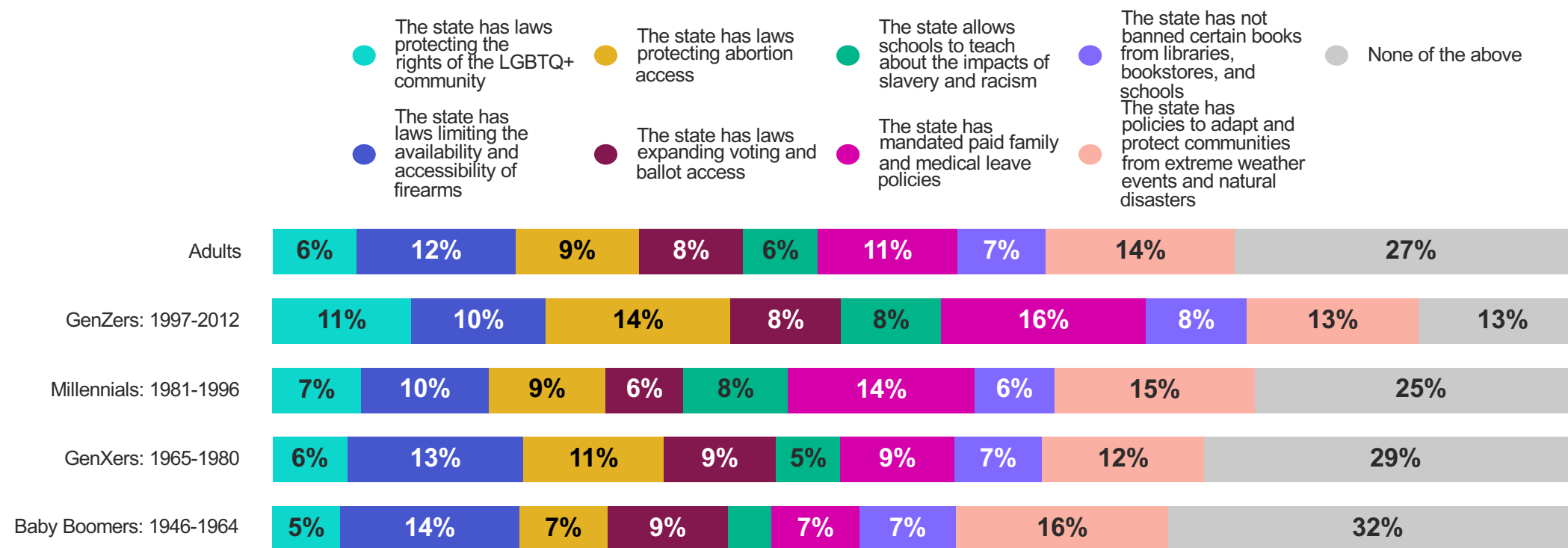
You indicated you are likely to relocate in the next two years. Would each of the following factors make you more or less likely to want to move to a given state?



TALENT MOBILITY AND RELOCATION CONSIDERATIONS

When forced to choose, GenZers are more likely than older generations to say policies related to *mandated paid family and medical leave*, *protecting abortion access*, and *protecting LGBTQ+ rights* are most important when thinking about moving to a given state.

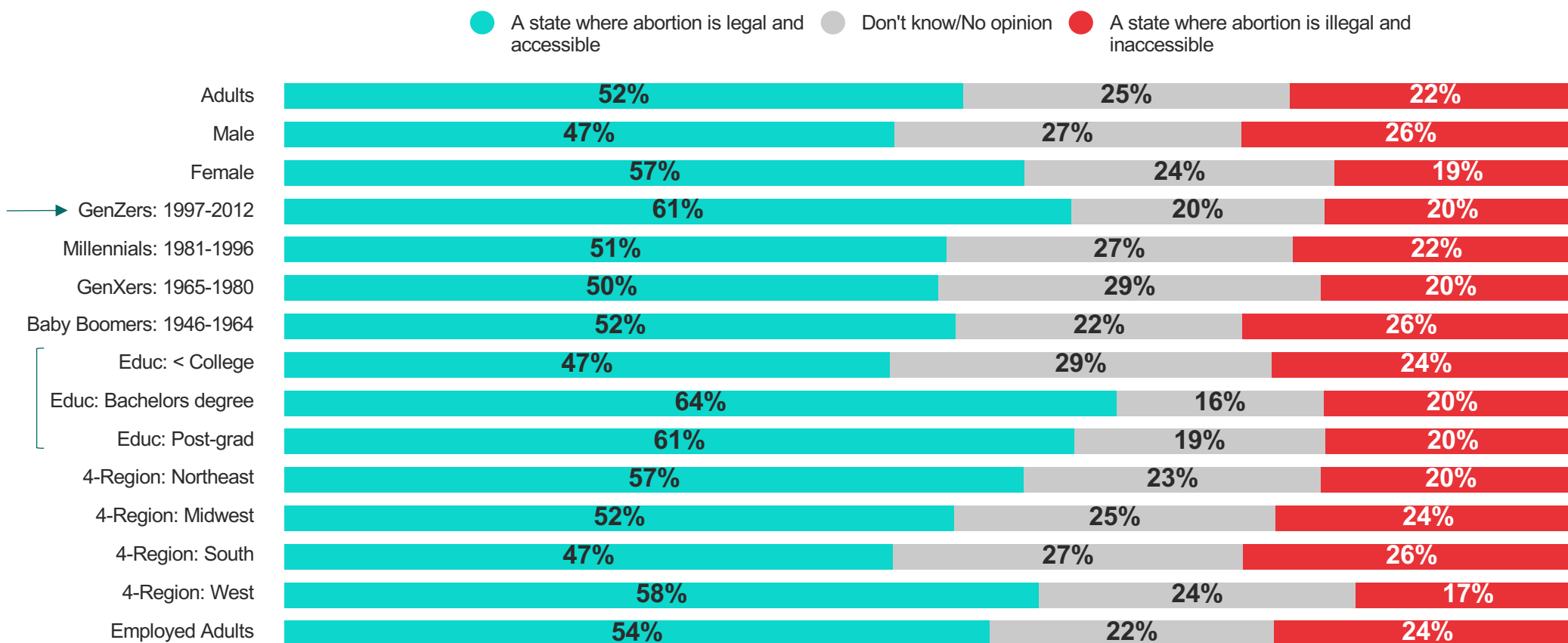
Of the options below, which is most important when thinking about your decision to move to a given state?



TALENT MOBILITY AND RELOCATION CONSIDERATIONS

Across all demographics, adults prefer to live in a state where abortion is legal and accessible, especially GenZers and higher educated adults.

As you may know, the Supreme Court of the United States recently overturned Roe v. Wade on June 24, 2022. This case established the constitutional right to abortion. Now that Roe v. Wade is overturned, abortion access and laws vary by state with many states outlawing it altogether in all or most circumstances. Which of the following, if any, would you prefer to live in?



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EXPECTATIONS FOR COMPANIES

SOCIAL POLICIES AT-A-GLANCE

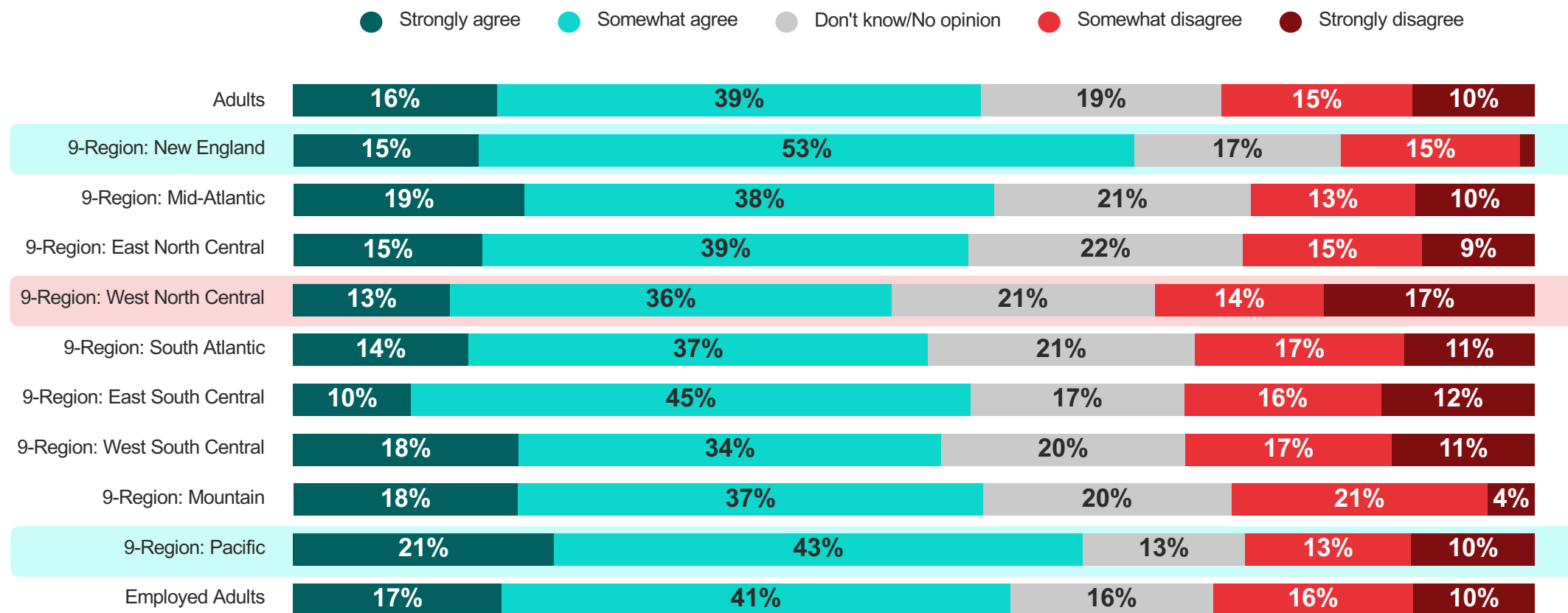
APPENDIX



SENTIMENT ON SOCIAL POLICIES

Adults living in New England (68%) and the Pacific (64%) are most likely to agree with the local and state policies where they live, while those living in the West North Central (31%) are most likely to disagree.

The term "social policies" refers to laws and norms on issues that span public health, schools and community safety, such as voting rights, paid family and medical leave, abortion access, rights for the LGBTQ+ community, and policies on what can or cannot be taught in schools. Do you agree or disagree with the local and state social policies where you live?

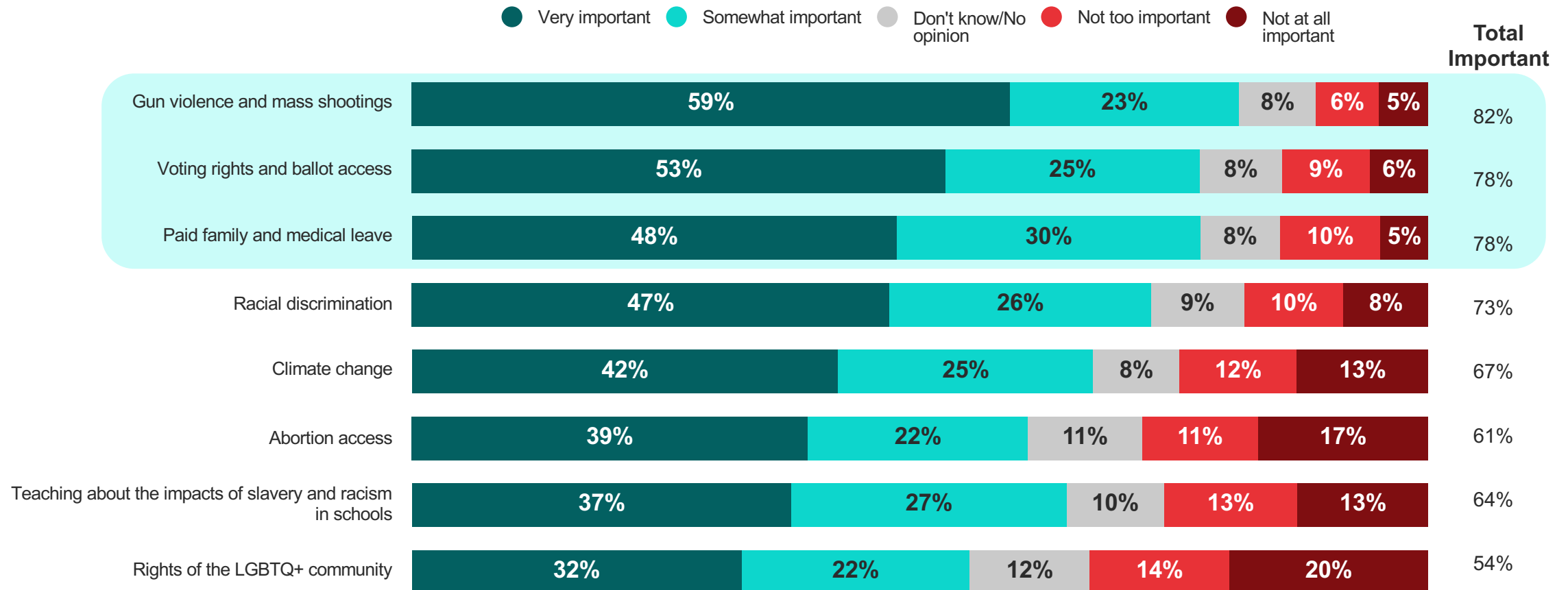


Based on census-designated divisions

West North Central: Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, South Dakota.

At least three-fourths of adults say it is important for their state to have social policies that promote social justice in the areas of *gun violence* (82%), *voting rights* (78%), and *paid family and medical leave* (78%).

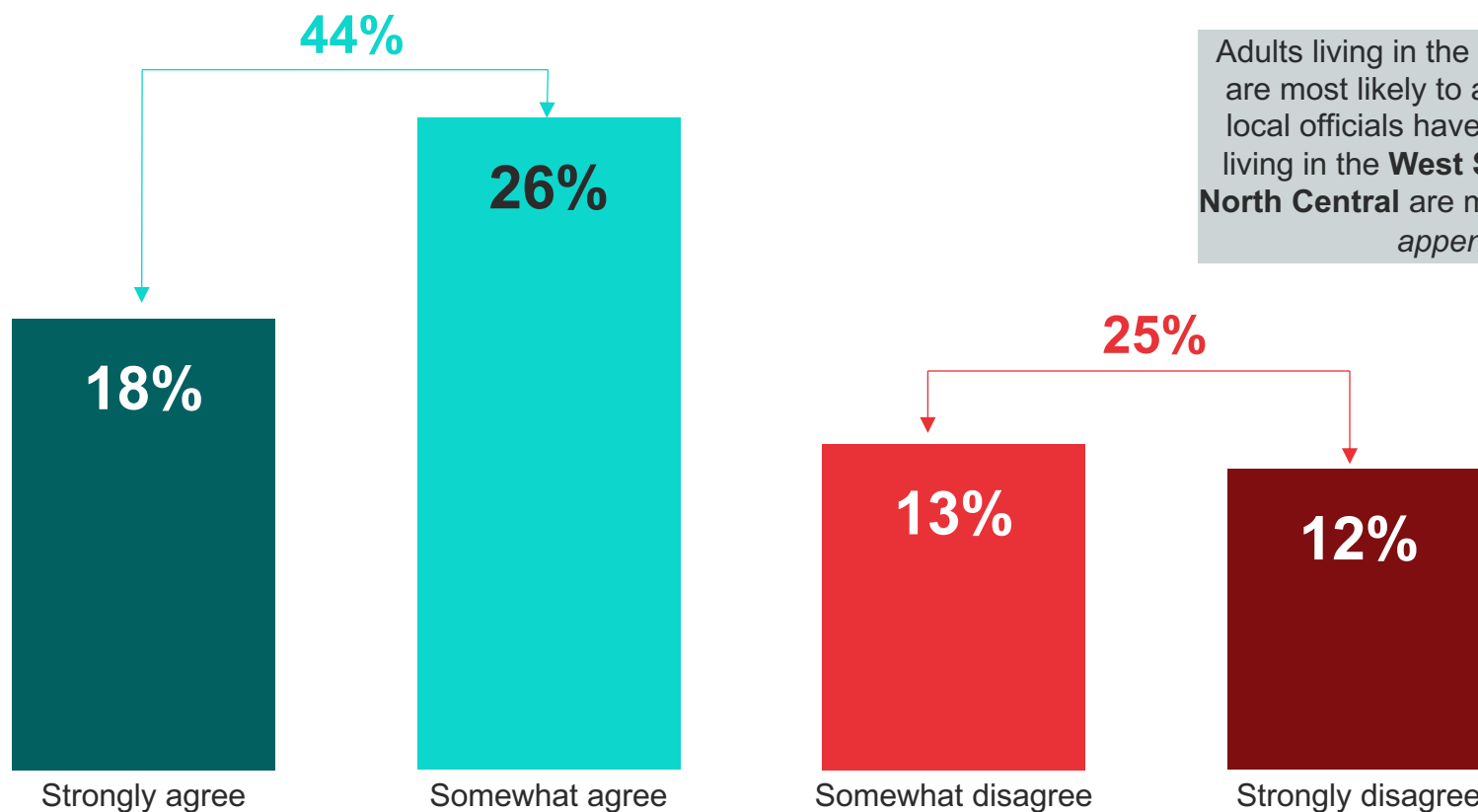
How important is it to you, if at all, for your state to have social policies that promote social justice in the following areas?



SENTIMENT ON SOCIAL POLICIES

One-fourth (25%) of adults say that state and local officials where they live have not stepped up when the federal government has failed to act—a gap where employers can take action instead.

Do you agree or disagree with the following statement? *State and local officials where I live have stepped up when the federal government has failed to act on social policies, such as abortion access and paid family and medical leave.*



Don't know/No opinion: 31%

West South Central: Arkansas, Louisiana, Oklahoma, Texas

West North Central: Iowa, Kansas, Minnesota,

Missouri, Nebraska, North Dakota, South Dakota

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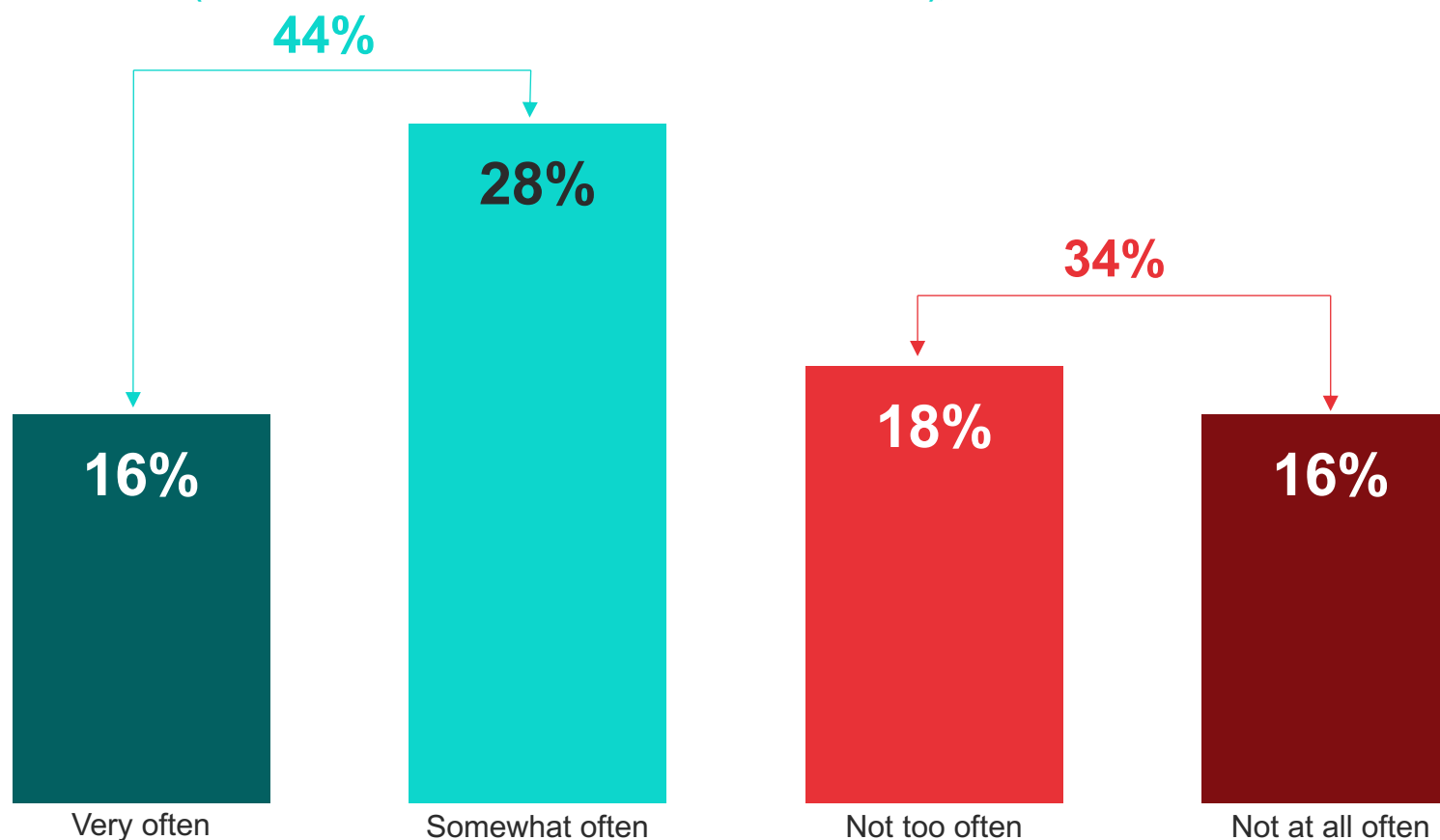


EXPECTATIONS FOR COMPANIES

Three-in-seven (44%) employed adults say their current employer responds to social issues *often*.

Regardless of if you believe companies should respond to social issues, how often, if at all, does your current employer respond to social issues?

AMONG EMPLOYED ADULTS (EXCLUDING THOSE WHO ARE SELF-EMPLOYED), n=1219

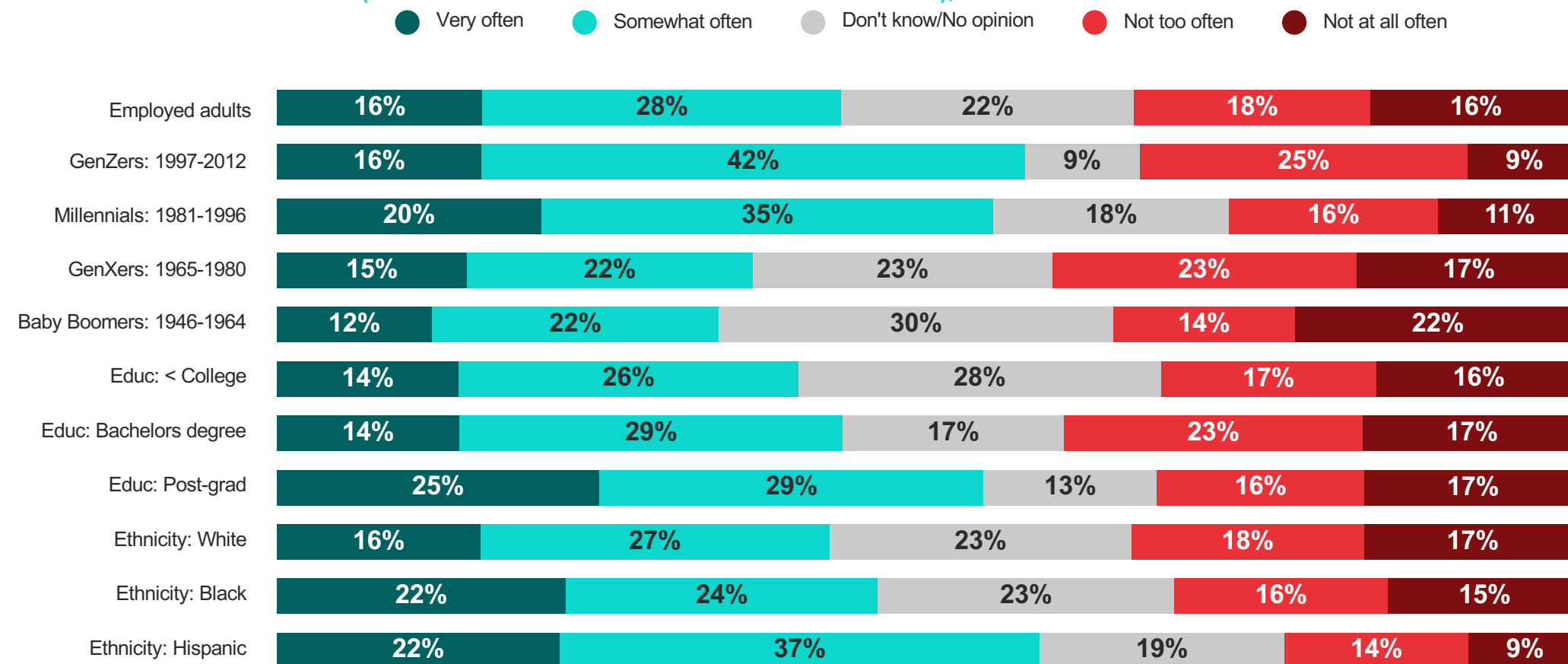


EXPECTATIONS FOR COMPANIES

GenZers and Millennials are more likely than older generations to have employers that respond to social issues often. Higher educated adults and Hispanic adults are also especially likely to work for employers that respond to social issues often.

Regardless of if you believe companies should respond to social issues, how often, if at all, does your current employer respond to social issues?

AMONG EMPLOYED ADULTS (EXCLUDING THOSE WHO ARE SELF-EMPLOYED), n=1219

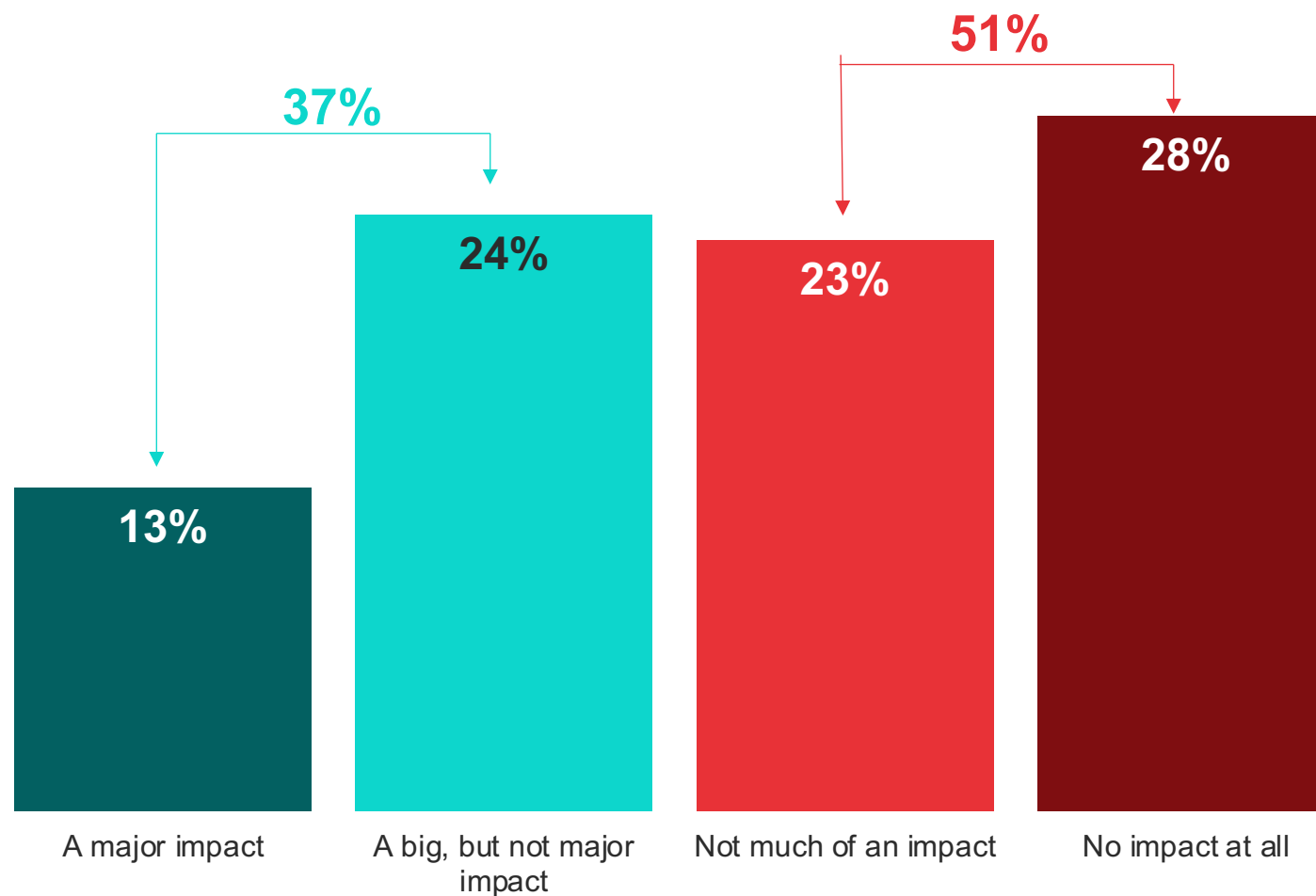


EXPECTATIONS FOR COMPANIES

More than one-third (37%) of employed adults say their company's response to social issues has an impact on their decision to stay at the organization.

How much of an impact, if at all, does your company's response to social issues have on your decision to stay at the organization?

AMONG EMPLOYED ADULTS (EXCLUDING THOSE WHO ARE SELF-EMPLOYED), n=1219

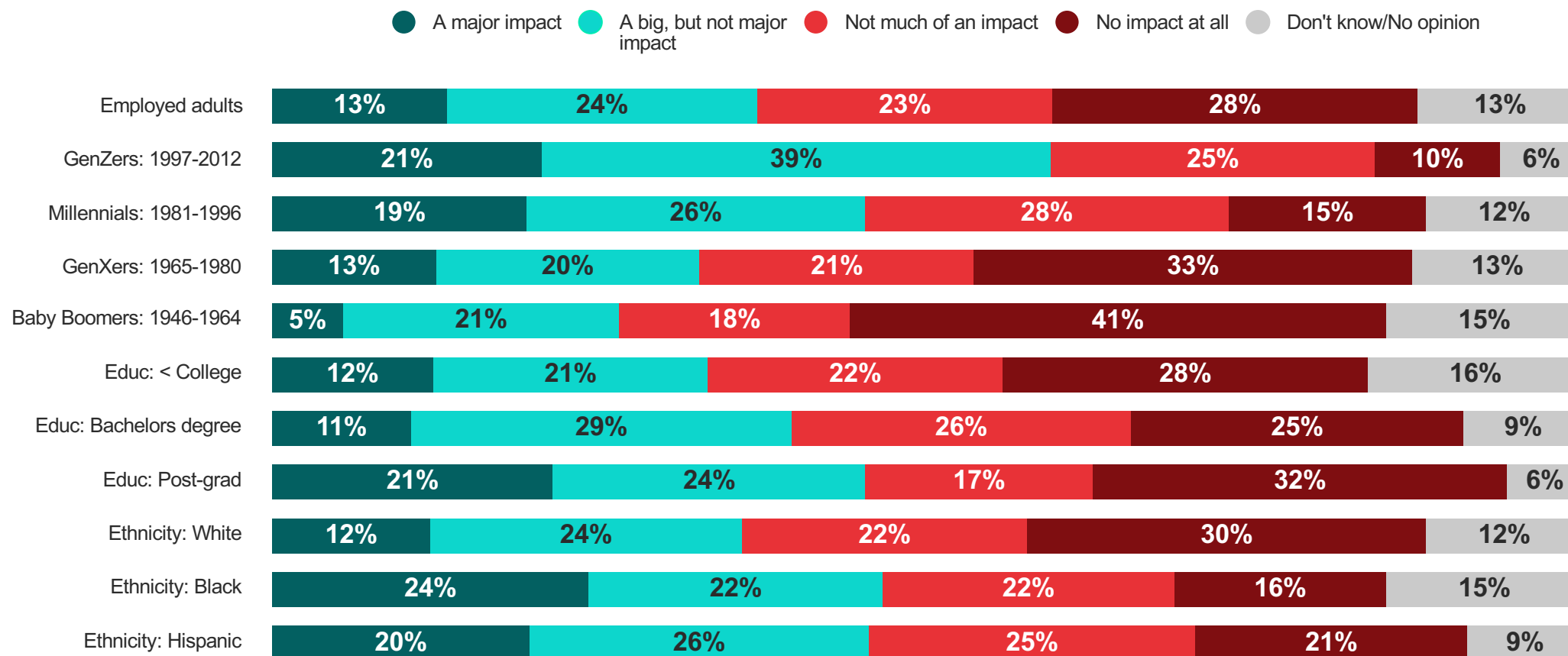


EXPECTATIONS FOR COMPANIES

GenZers and Millennials are nearly **twice as likely** as older generations to say their company's response to social issues has an impact on their decision to stay at the organization. Higher educated adults and Black and Hispanic adults are also especially likely to say this has an impact.

How much of an impact, if at all, does your company's response to social issues have on your decision to stay at the organization?

AMONG EMPLOYED ADULTS (EXCLUDING THOSE WHO ARE SELF-EMPLOYED), n=1219



EXPECTATIONS FOR COMPANIES

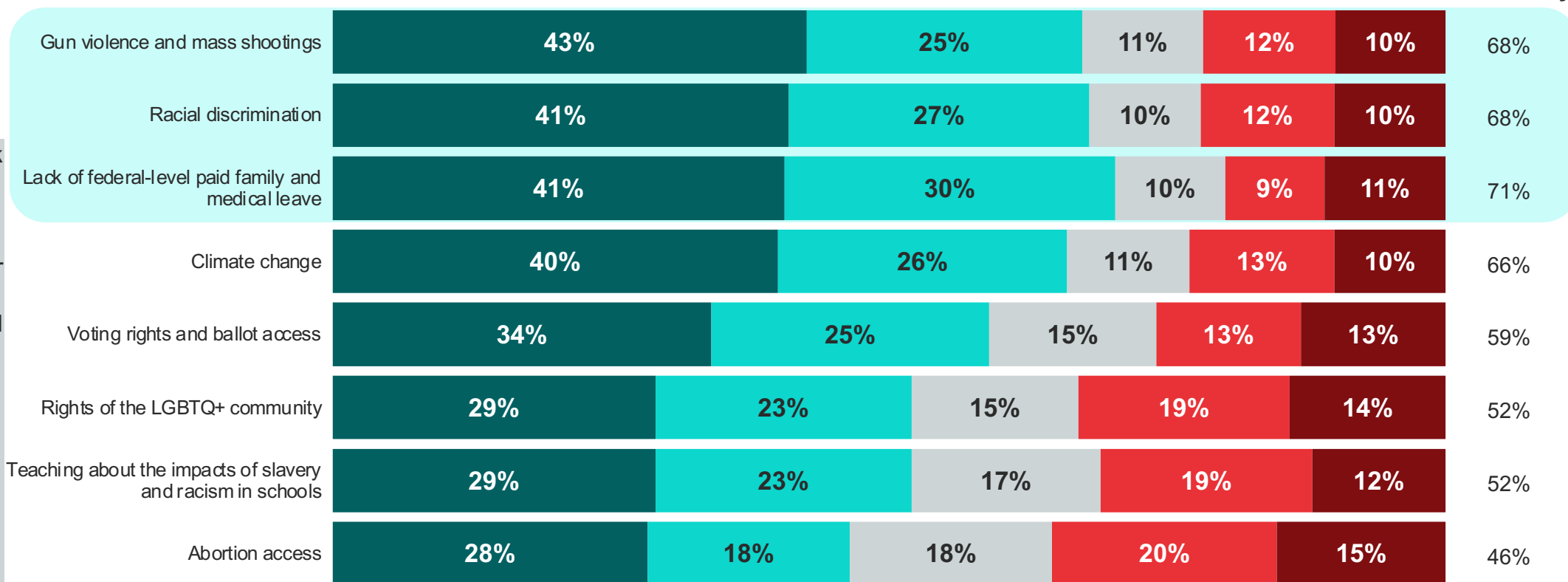
Two-thirds of employed adults say companies should respond to the *lack of federal paid family and medical leave* (71%), *racial discrimination* (68%), and *gun violence and mass shootings* (68%), including two-fifths who say companies should *definitely* respond to these issues.

In your opinion, should companies respond to the social issues below?

AMONG ALL EMPLOYED ADULTS, n=1581

● Definitely
 ● Probably
 ● Don't know/No opinion
 ● Probably not
 ● Definitely not

% Definitely
+ Probably



Employed **Black adults** report higher support than employed **White adults** for companies to respond to racial discrimination (78% vs 67%), teaching about the impacts of slavery (70% vs 48%), and abortion access (61% vs 46%).

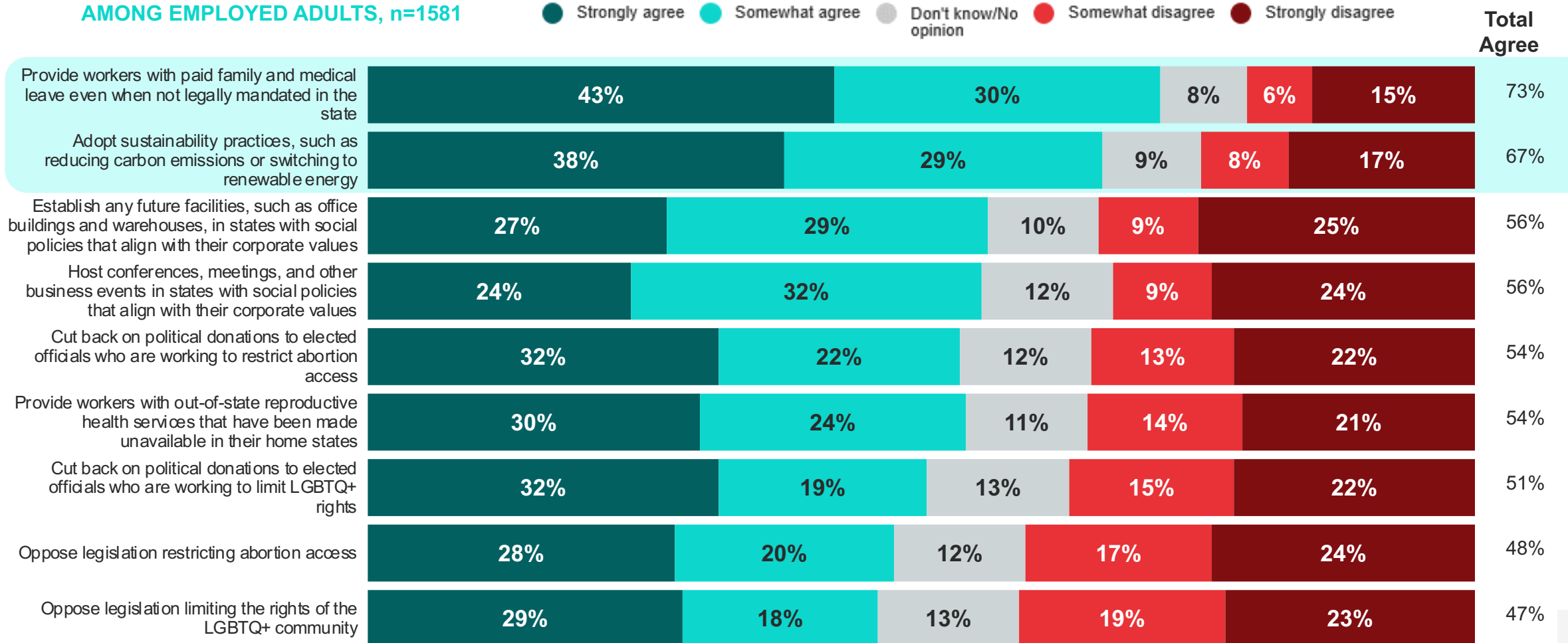
EXPECTATIONS FOR COMPANIES

A strong majority of employed adults agree that companies should *provide workers with paid family and medical leave* (73%) and *adopt sustainability practices* (67%).

Do you agree or disagree with each of the following statements? **Companies should...**

AMONG EMPLOYED ADULTS, n=1581

● Strongly agree
 ● Somewhat agree
 ● Don't know/No opinion
 ● Somewhat disagree
 ● Strongly disagree



EXPECTATIONS FOR COMPANIES

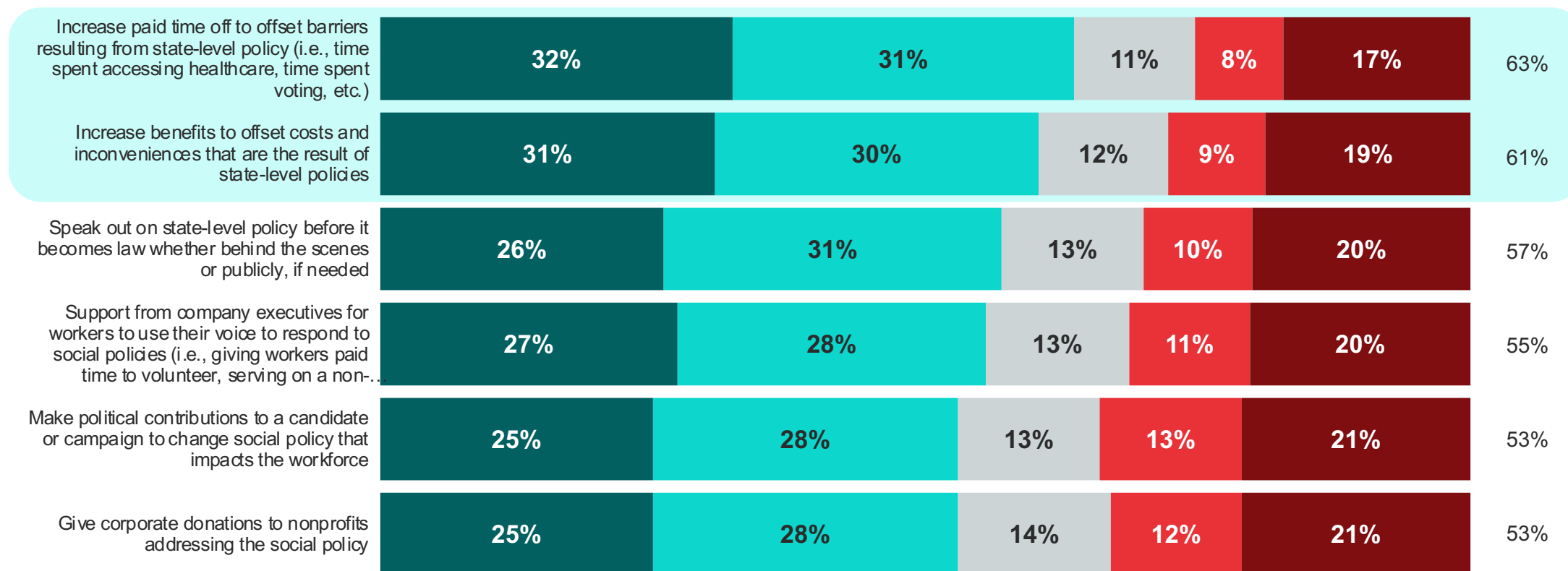
When moving to a state with social policies that do not reflect their personal values, about three-in-five employed adults say it would be important for their employer *to increase paid time off* (63%) and *increase benefits* (61%) to offset barriers and costs resulting from state-level policies, including one-third who say this would be *very important*. This trend is consistent across generation, ethnicity, and education.

If you moved to a state with social policies that do not reflect your own personal values, how important would it be for your employer to respond in the following ways?

AMONG ALL EMPLOYED ADULTS, n=1581

● Very important
 ● Somewhat important
 ● Don't know/No opinion
 ● Not too important
 ● Not important at all

Total Important



EXPECTATIONS FOR COMPANIES

A majority of employed adults agree that if a company declares its commitment to promoting social justice, the company *cares about their workers* (74%) and *customers* (74%). Despite this, half of employed adults would think that the company is *more focused on how they appear* (56%) and is just *trying to attract customers* (56%).

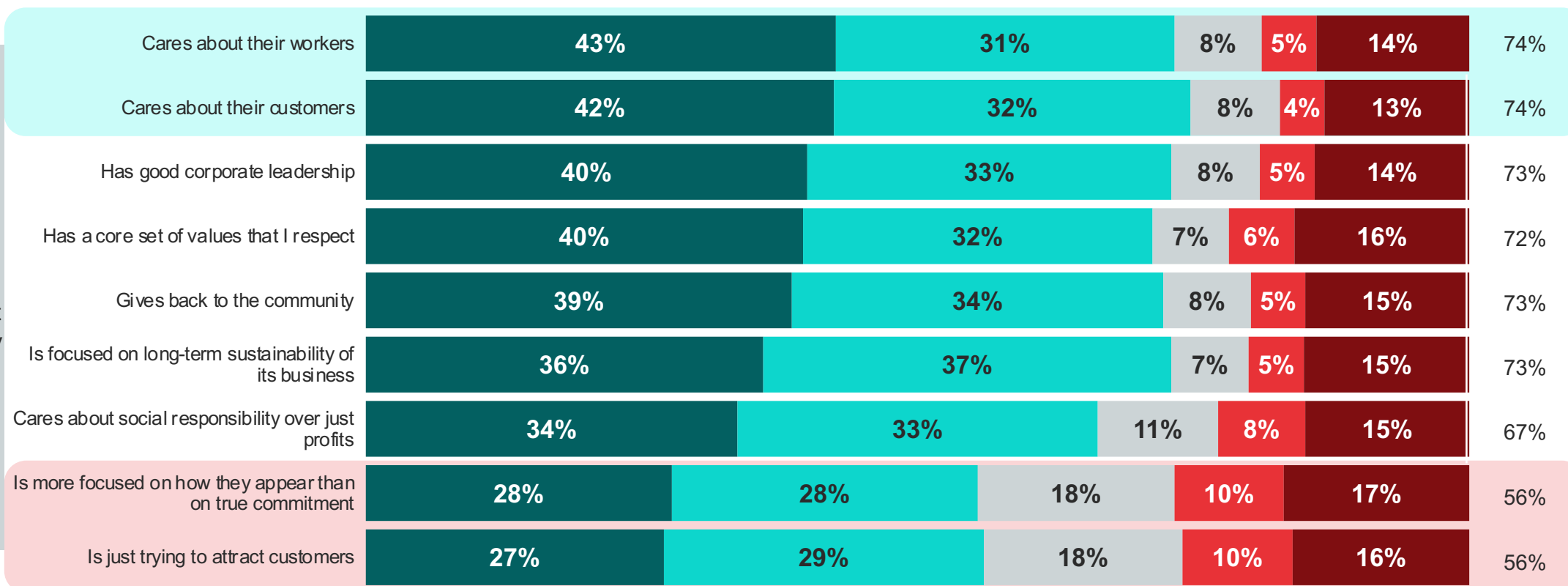
If a company declares its commitment to promoting social justice, please indicate how much you agree or disagree with each of the following statements. / would think that the company...

AMONG ALL EMPLOYED ADULTS, n=1581

● Strongly agree
 ● Somewhat agree
 ● Don't know/No opinion
 ● Somewhat disagree
 ● Strongly disagree

Total Agree

Employed GenZers and employed Millennials are more likely than older generations to agree that the company is more focused on how they appear and is just trying to attract customers.

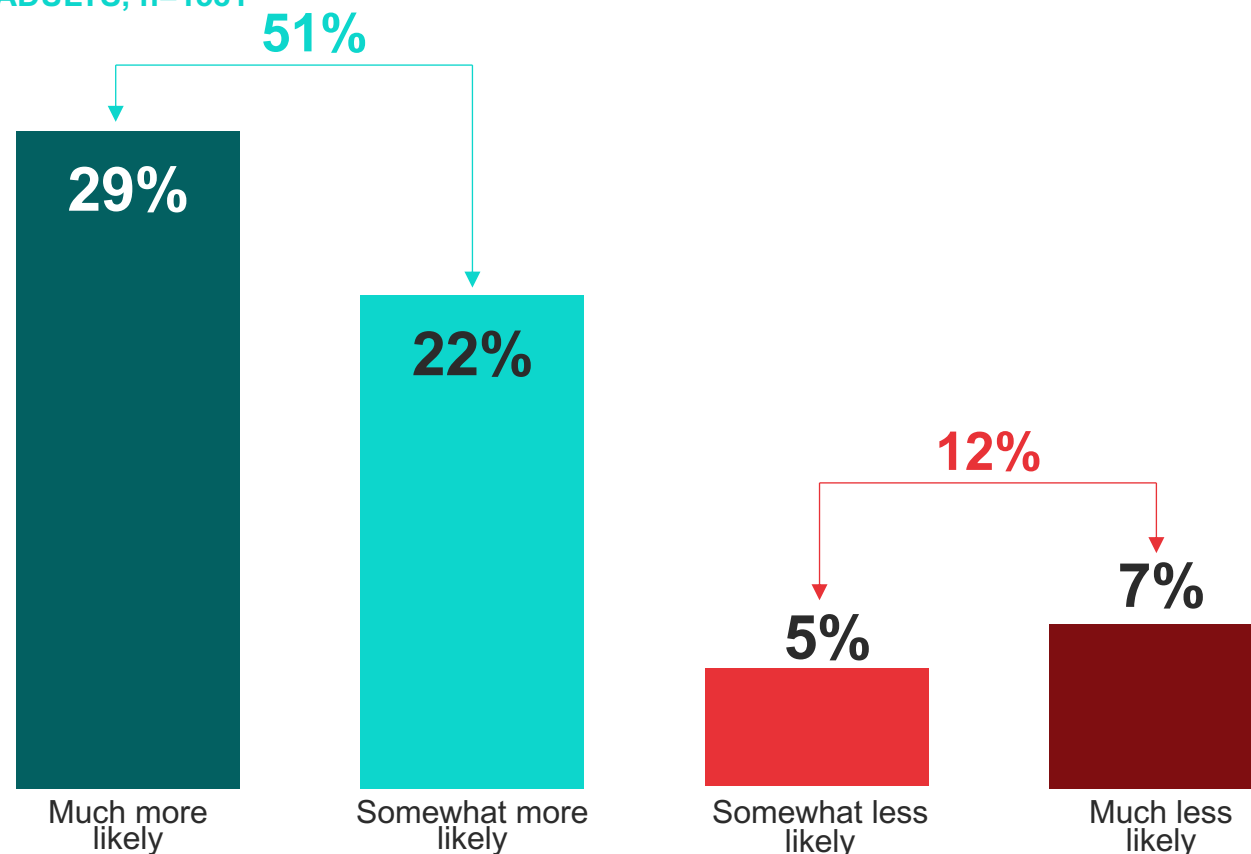


EXPECTATIONS FOR COMPANIES

Just one-in ten (12%) employed adults say they would be less likely to work for a company that promotes social justice internally through workplace policies and practices, while **four times** as many (51%) say it would make them more likely to work for a company that does this.

Would you be more or less likely to work for a company that promotes social justice through workplace policies and practices, such as establishing diversity, equity, and inclusion leadership roles, ensuring diverse hiring committees, or providing implicit bias trainings and workshops?

AMONG ALL EMPLOYED ADULTS, n=1581



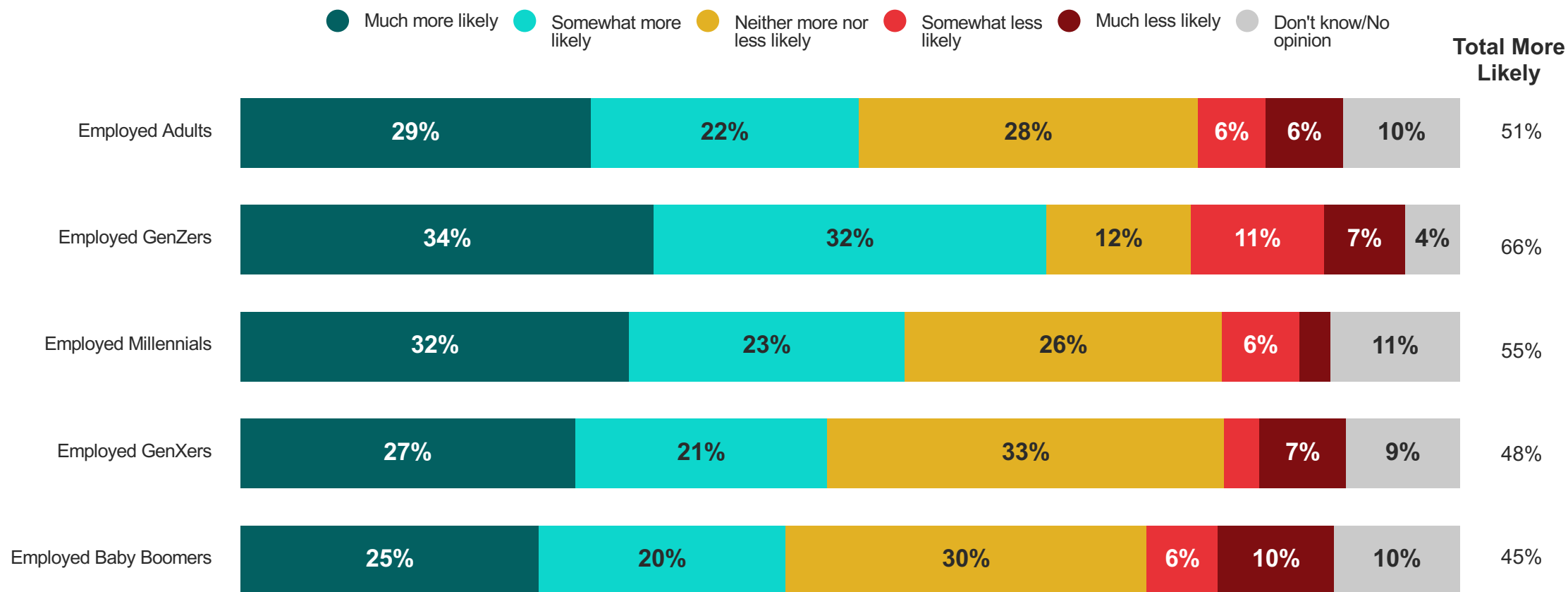
Neither more nor less likely: 27%
Don't know/No opinion: 10%

EXPECTATIONS FOR COMPANIES

Employed GenZers and employed Millennials say they would be more likely to work for a company that promotes social justice internally through workplace policies and practices, compared to older generations.

Would you be more or less likely to work for a company that promotes social justice through workplace policies and practices, such as establishing diversity, equity, and inclusion leadership roles, ensuring diverse hiring committees, or providing implicit bias trainings and workshops?

AMONG ALL EMPLOYED ADULTS, n=1581

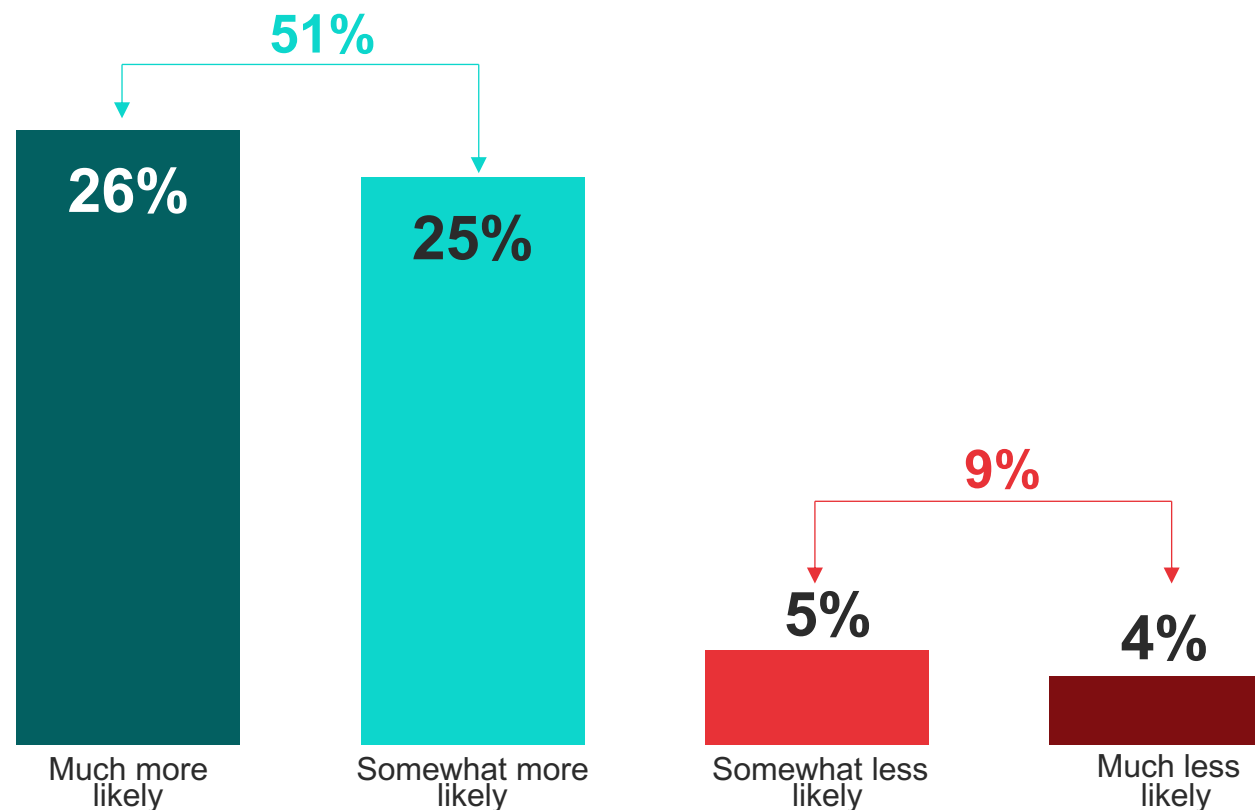


EXPECTATIONS FOR COMPANIES

Just one-in ten (9%) employed adults say they would be less likely to work for a company that promotes social justice through investments, donations, and advocacy, while **five times** as many (51%) say it would make them more likely to work for a company that does this.

Would you be more or less likely to work for a company that promotes social justice through investments in local communities, donations to non-profit organizations, or public advocacy initiatives and partnerships?

AMONG ALL EMPLOYED ADULTS, n=1581



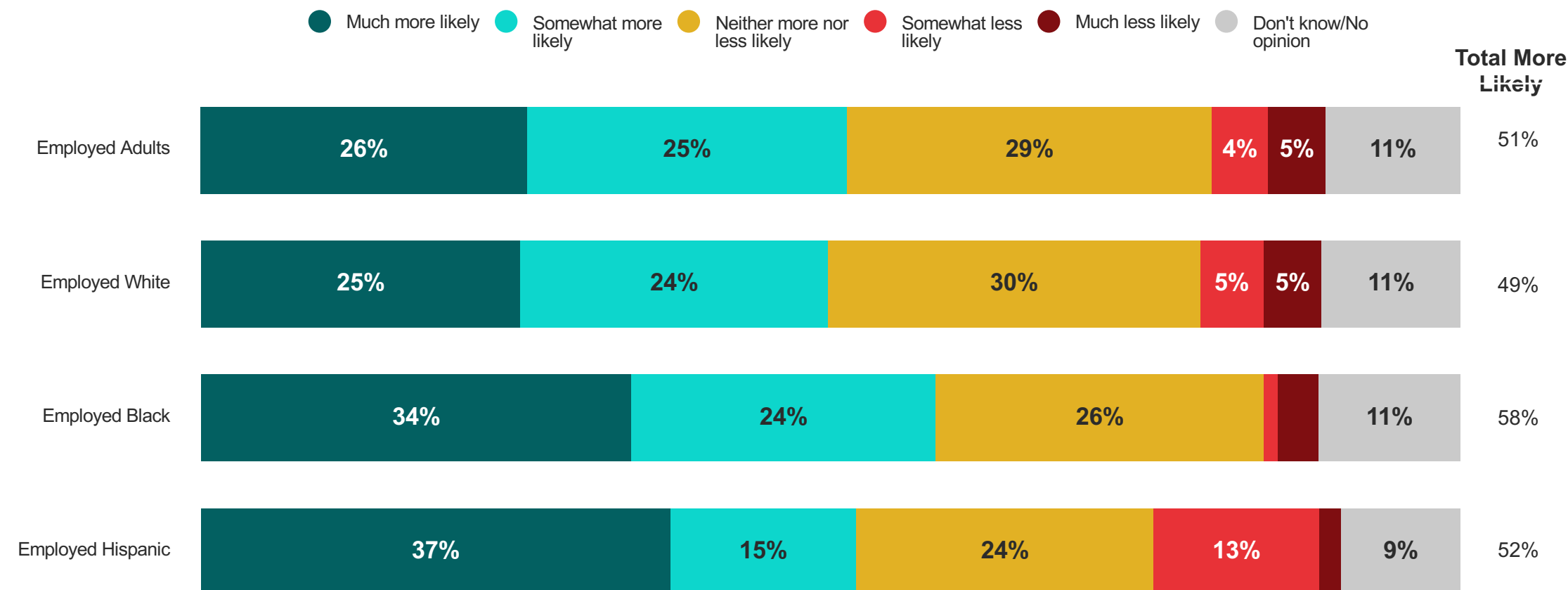
Neither more nor less likely: 29%
Don't know/No opinion: 10%

EXPECTATIONS FOR COMPANIES

Employed Black adults (58%) say they would be more likely to work for a company that promotes social justice through investments, donations, and advocacy, compared to employed White (49%) and employed Hispanic adults (52%).

Would you be more or less likely to work for a company that promotes social justice through investments in local communities, donations to non-profit organizations, or public advocacy initiatives and partnerships?

AMONG ALL EMPLOYED ADULTS, n=1581



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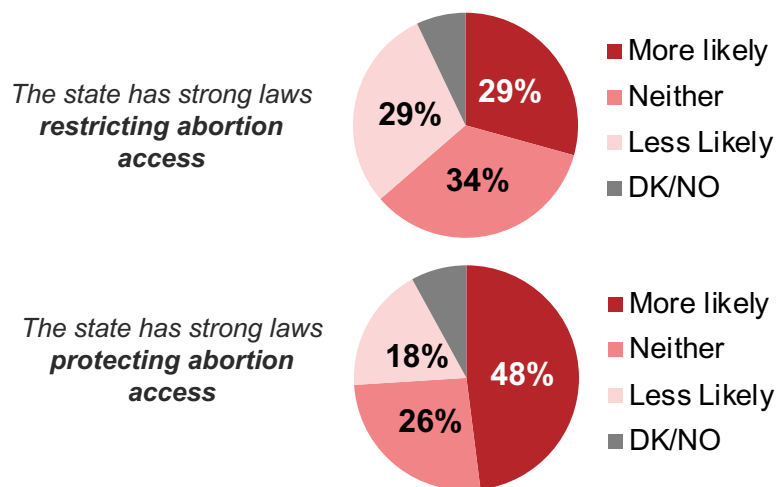




ABORTION ACCESS

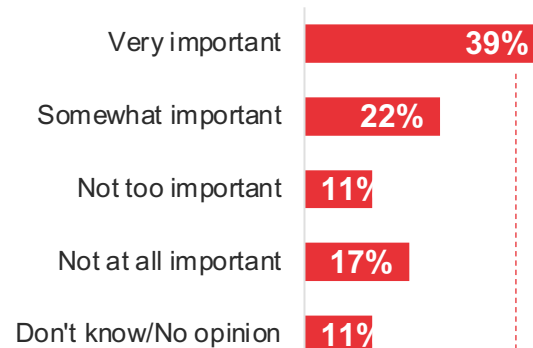
Among adults likely to relocate in the next two years, **half (48%)** say a state with laws **protecting abortion access** would make them **more likely to move there**. **Three-in-five adults (61%)** say it is **important** for their state to have social policies that promote social justice related to abortion access. By a **2:1 margin**, adults say they would **prefer to live in a state where abortion is legal and accessible** than where it is illegal.

You indicated you are likely to relocate in the next two years. Would each of the following factors make you more or less likely to want to move to a given state?*



*Among adults likely to relocate in the next two years, n=773

How important is it to you, if at all, for your state to have social policies that promote social justice related to abortion access?



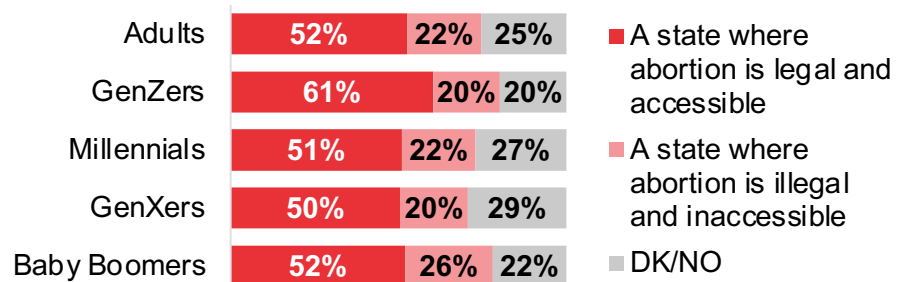
GenZers (69%) and females (65%) are especially likely to say it is important for their state to have social policies that promote social justice related to abortion access.

If you were to (or currently do) live in a state where abortion is illegal and inaccessible, how concerned would you be, or are you, if at all, about the following?*

% CONCERNED	
Seeking urgent medical care if unexpected pregnancy complications arise that put my life or my partner's life at serious risk	46%
Me or my partner being criminally charged or going to prison for having an abortion in a state where it is illegal	40%
Me or my partner being forced to continue with an unintended pregnancy	39%
Me or my partner being reported to authorities if suspected of having an abortion	38%
Having enough money for me or my partner to travel out of state for an abortion	35%
Being able to take time off work for me or my partner to travel out of state for an abortion	35%
Finding childcare arrangements for me or my partner to travel out of state for an abortion	31%

*Among female adults, n=1134

Which of the following, if any, would you prefer to live in?



48%

Agree companies **should oppose legislation restricting abortion access***

*Among employed adults, n=1581

54%

Agree companies should **cut back on political donations to elected officials who are working to restrict abortion access***

54%

Agree companies should **provide workers with out-of-state reproductive health services** that have been unavailable in their home states*

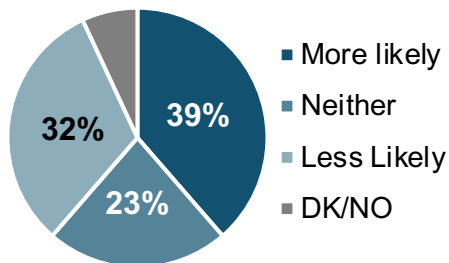


GUN VIOLENCE

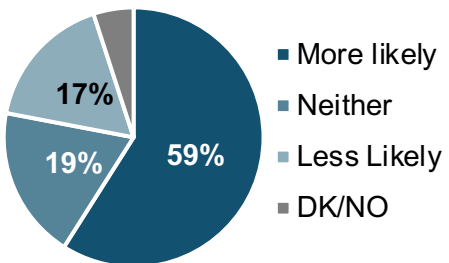
Four-in-five adults (82%) say it is **important** for their state to have social policies that promote social justice related to gun violence and mass shootings. Additionally, **at least two-thirds** of **employed adults** say **companies should respond to gun violence and mass shootings**.

You indicated you are likely to relocate in the next two years. Would each of the following factors make you more or less likely to want to move to a given state?*

The state has **permissive firearm laws**, such as open carry laws meaning individuals can openly carry firearms in public



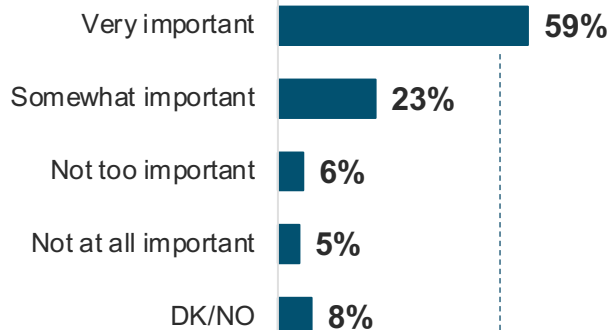
The state has **restrictive firearm laws**, such as bans on assault weapons and enhanced background check systems



Among adults likely to relocate in the next two years, **three-in-five (59%)** say they would be **more likely to move to a state with restrictive firearms laws**.

*Among adults likely to relocate in the next two years, n=773

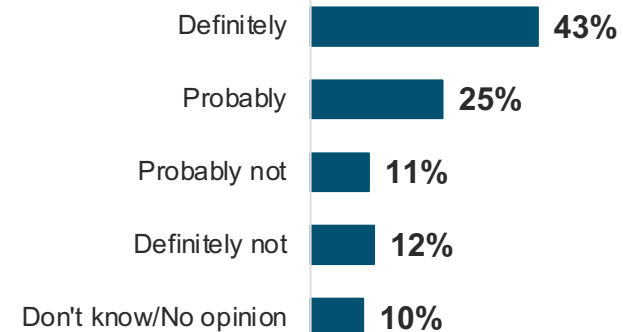
How important is it to you, if at all, for your state to have social policies that promote social justice related to gun violence and mass shootings?



Black adults (87%) especially say it is important for their state to have social policies that promote social justice related to gun violence and mass shootings.

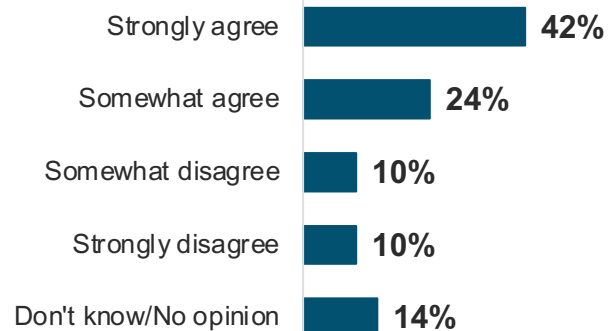


In your opinion, should companies respond to gun violence and mass shootings?** See slide 24.



**Among employed adults, n=1581

Do you agree or disagree that companies should speak out against events of gun violence and mass shootings?*



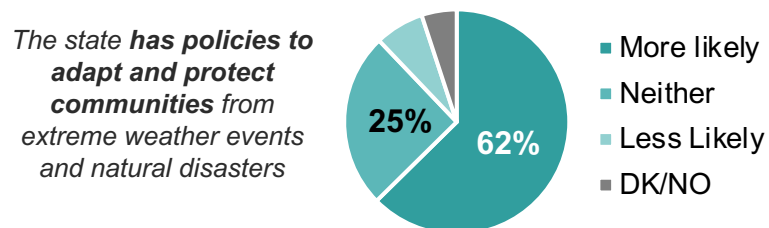
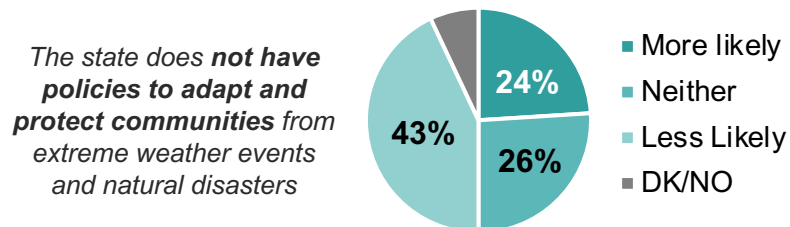
**Among employed adults, n=1581



CLIMATE CHANGE

Four-in-five (79%) say the **incidence of extreme weather events** is **important** when thinking about moving to a different state. Additionally, **two-thirds** of **employed adults** say **companies should respond to climate change** and **adopt sustainability practices**.

You indicated you are likely to relocate in the next two years. Would each of the following factors make you more or less likely to want to move to a given state?*

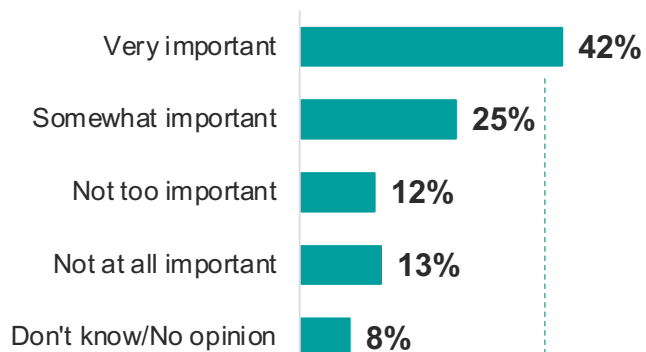


Among adults likely to relocate in the next two years, **three-in-five (62%)** say a state that **has policies to adapt and protect communities from extreme weather events and natural disasters** would make them **more likely to move**.



*Among adults likely to relocate in the next two years, n=773

How important is it to you, if at all, for your state to have social policies that promote social justice related to climate change?

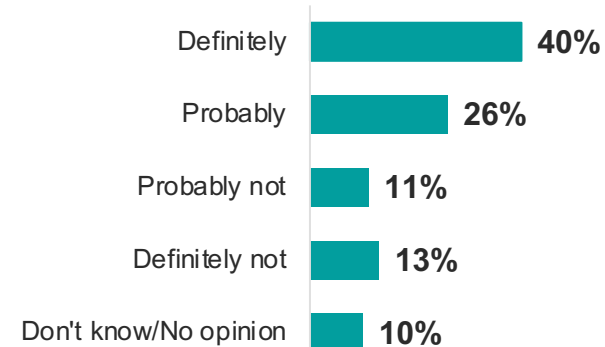


Total importance is higher among **Black (77%)** and **Hispanic (70%)** adults compared to **White** adults (64%).

% CONSIDERING EXTREME WEATHER/NATURAL DISASTERS IMPORTANT WHEN RELOCATING

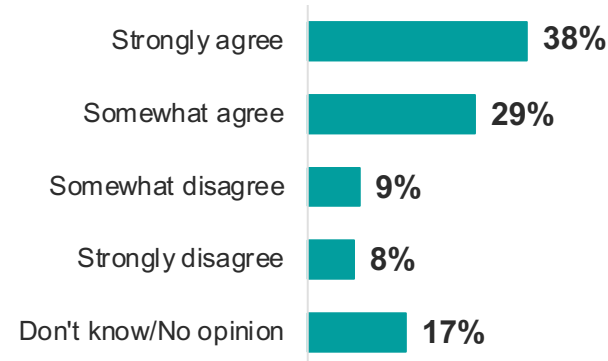
All Adults	79%
GenZers	71%
Millennials	77%
GenXers	79%
Baby Boomers	84%

In your opinion, should companies respond to climate change?



**Among employed adults, n=1581

Do you agree or disagree that companies should adopt sustainability practices, such as reducing carbon emissions or switching to renewable energy?



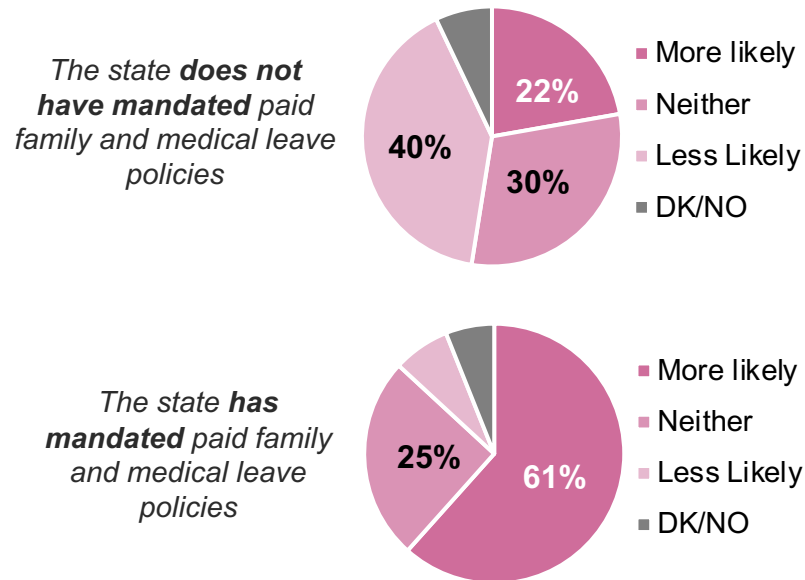
**Among employed adults, n=1581



PAID FAMILY AND MEDICAL LEAVE

Nearly **four-in-five (78%)** adults say it is **important** to them that their state **has social policies that promote social justice related to paid family leave**. Additionally, nearly **three-fourths** of employed adults say **companies should respond** to lack of mandated paid family and medical leave.

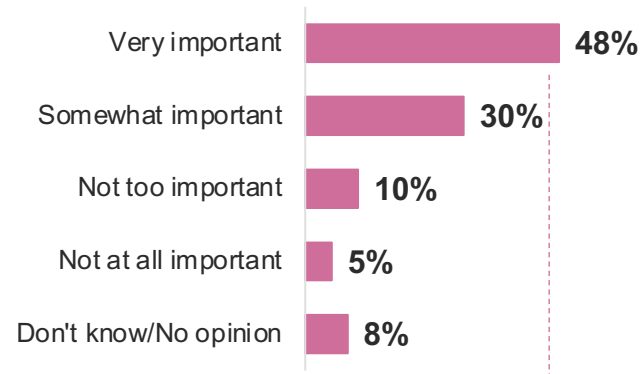
You indicated you are likely to relocate in the next two years. Would each of the following factors make you more or less likely to want to move to a given state?*



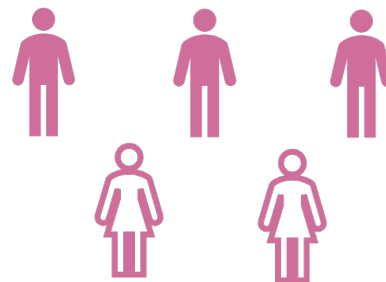
Among adults likely to move in the next two years, **three-in-five (61%)** say **mandated paid family and medical leave policies** would make them **more likely** to move to a given state.

*Among adults likely to relocate in the next two years, n=773

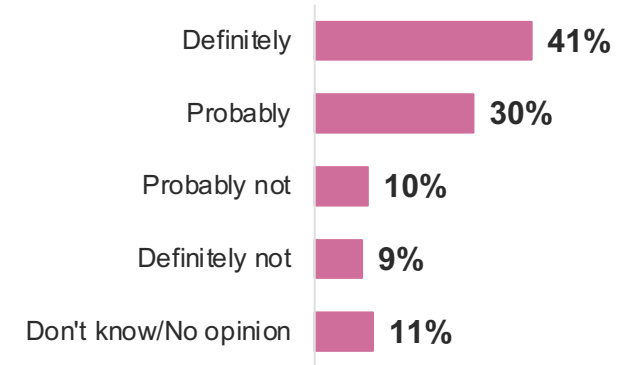
How important is it to you, if at all, for your state to have social policies that promote social justice related to paid family and medical leave?



Across all demographics, at least three-fourths of adults say it is important for their state to have social policies that promote social justice related to paid family and medical leave.

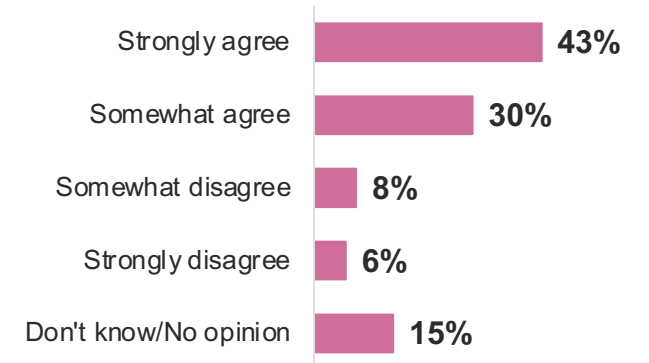


In your opinion, should companies respond to the lack of federal-level paid family and medical leave?*



**Among employed adults, n=1581

Do you agree or disagree that companies should provide workers with paid family and medical leave even when not legally mandated in the state**



**Among employed adults, n=1581



AGENDA

TALENT MOBILITY AND RELOCATION
CONSIDERATIONS

SENTIMENT ON SOCIAL POLICIES

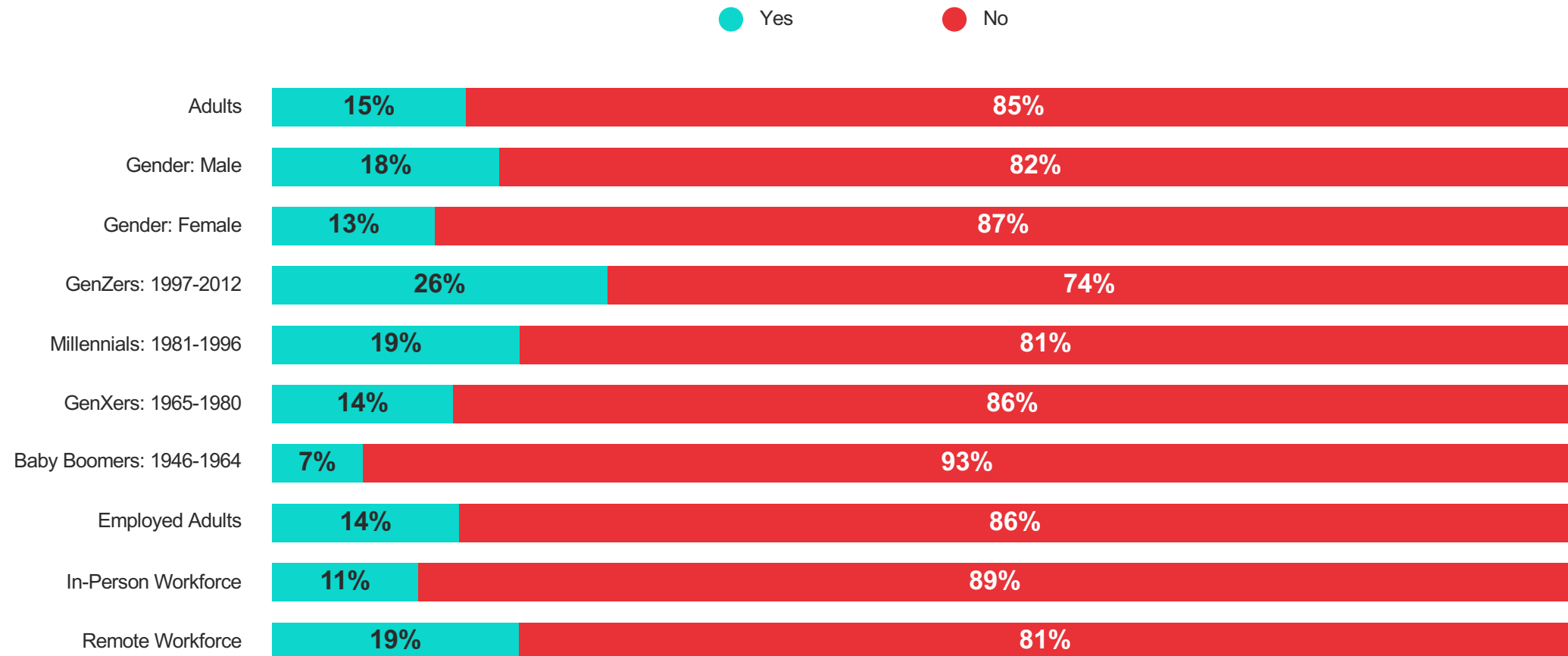
EXPECTATIONS FOR COMPANIES

SOCIAL POLICIES AT-A-GLANCE

APPENDIX

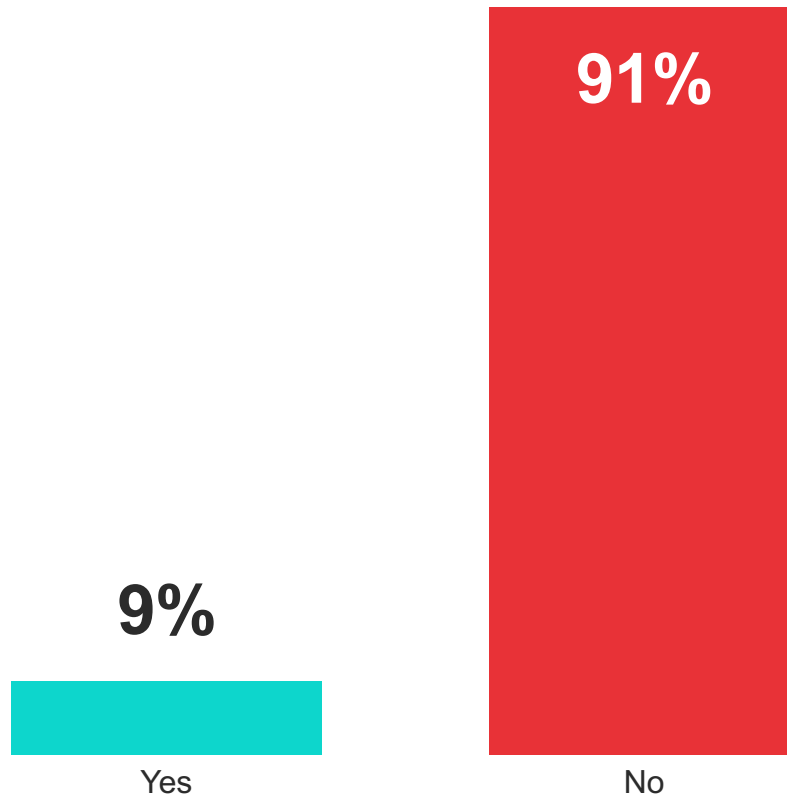


In the past year, were you looking to relocate to a different state?

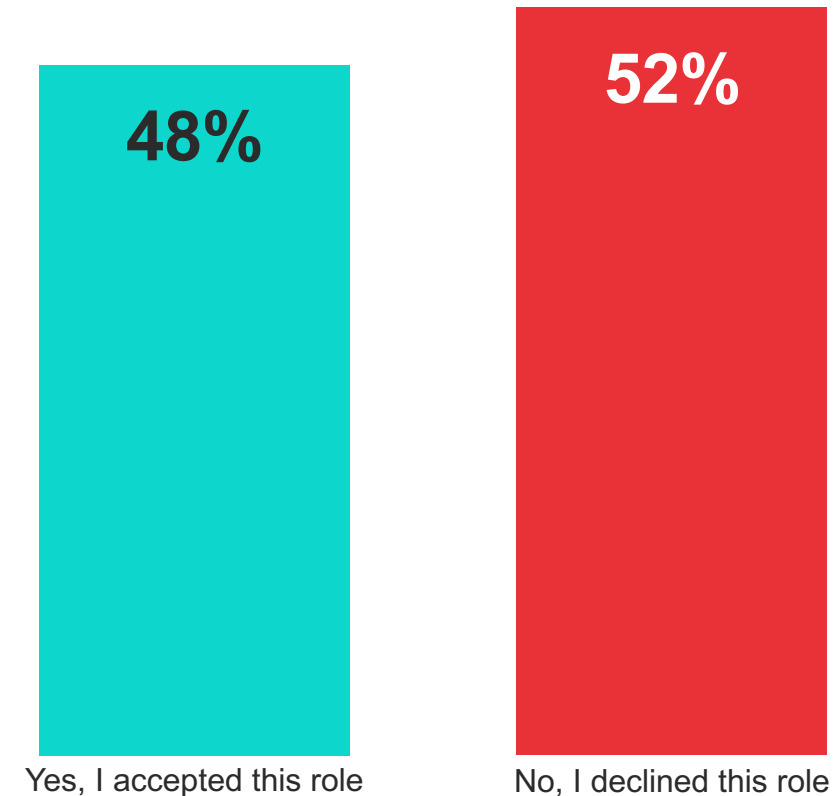


APPENDIX

In the past year, were you offered a compelling professional opportunity that required you to relocate to a different state?



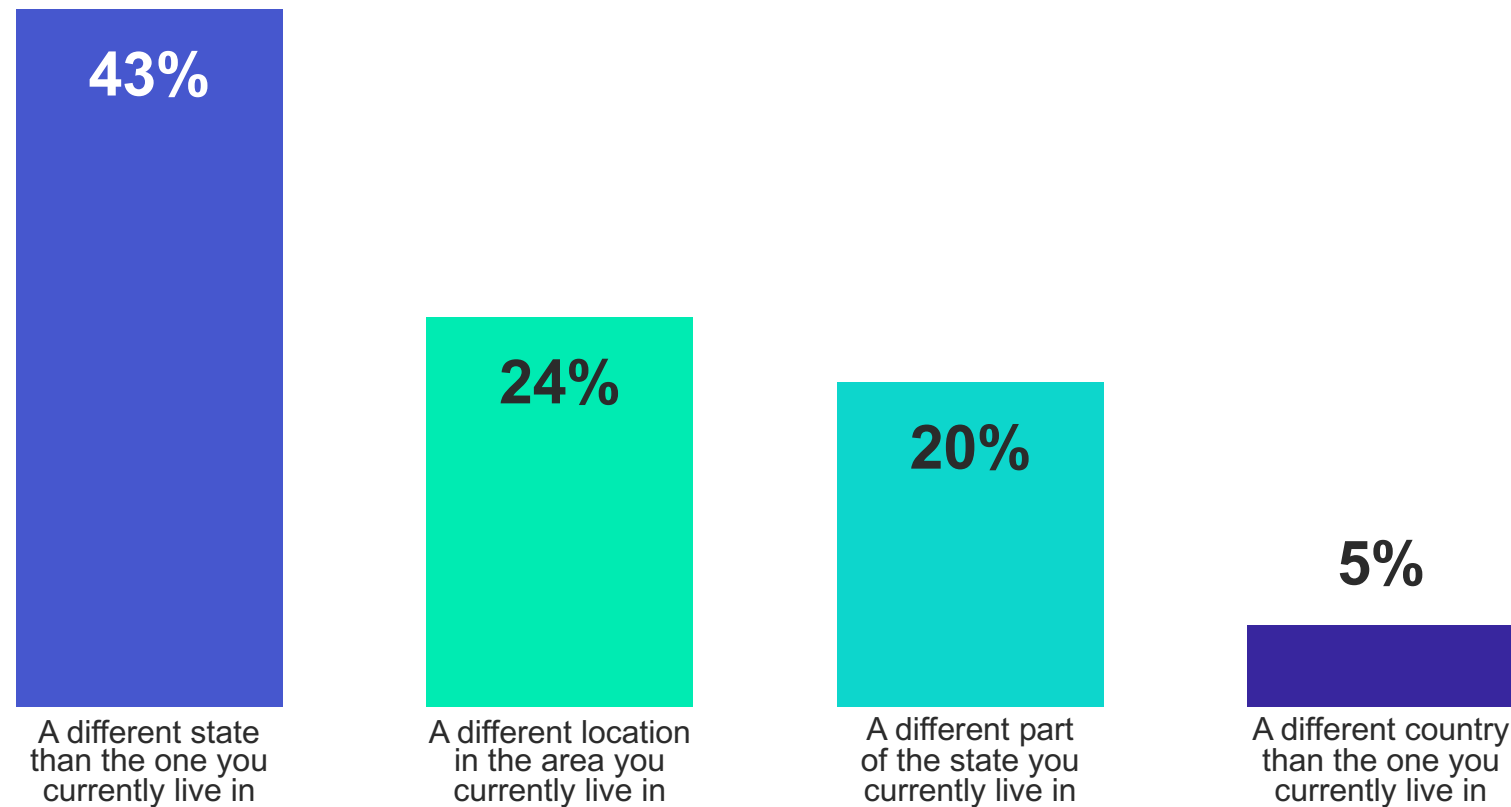
You indicated that in the past year you were offered a compelling professional opportunity that required you to relocate to a different state. Did you accept this role?



AMONG ADULTS OFFERED PROFESSIONAL
OPPORTUNITY WITH RELOCATION, n=190

You indicated you are likely to relocate in the next two years. If you were to relocate during this time, which of the following best describes where you would be most likely to go?

AMONG ADULTS LIKELY TO RELOCATE, n=773



Don't know/No opinion: 7%

APPENDIX

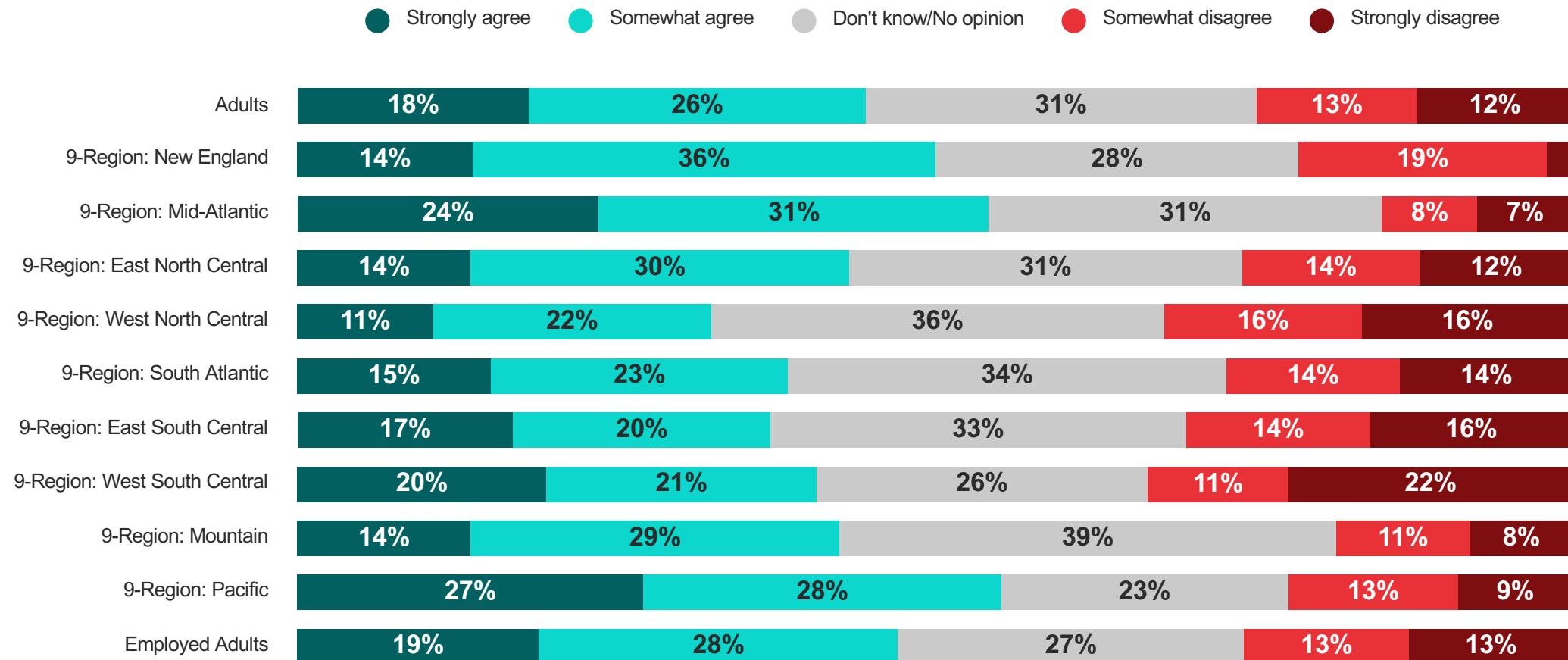
You indicated you are likely to relocate in the next two years. Would each of the following factors make you more or less likely to want to move to a given state?

AMONG ADULTS LIKELY TO RELOCATE, n=773

SAMPLE A	% More Likely	% Less Likely	SAMPLE B	% More Likely	% Less Likely
The state has policies to adapt and protect communities from extreme weather events and natural disasters	62%	7%	The state does not have policies to adapt and protect communities from extreme weather events and natural disasters	24%	42%
The state has mandated paid family and medical leave policies	61%	8%	The state does not have mandated paid family and medical leave policies	22%	40%
The state has restrictive firearm laws, such as bans on assault weapons and enhanced background check systems	59%	17%	The state has permissive firearm laws, such as open carry laws meaning individuals can openly carry firearms in public	39%	31%
The state has permissive voting laws, such as laws expanding early voting and voting by mail	52%	13%	The state has restrictive voting laws, such as laws limiting early voting and voting by mail	26%	36%
The state does not have laws banning certain books from libraries, bookstores, and schools	51%	14%	The state has laws banning certain books from libraries, bookstores, and schools	27%	45%
The state allows schools to teach about the impacts of slavery and racism	49%	14%	The state restricts schools from teaching about the impacts of slavery and racism	28%	39%
The state has strong laws protecting abortion access	48%	18%	The state has strong laws restricting abortion access	30%	29%
The state has laws that protect the LGBTQ+ community	48%	14%	The state has laws that are discriminatory to the LGBTQ+ community	24%	36%

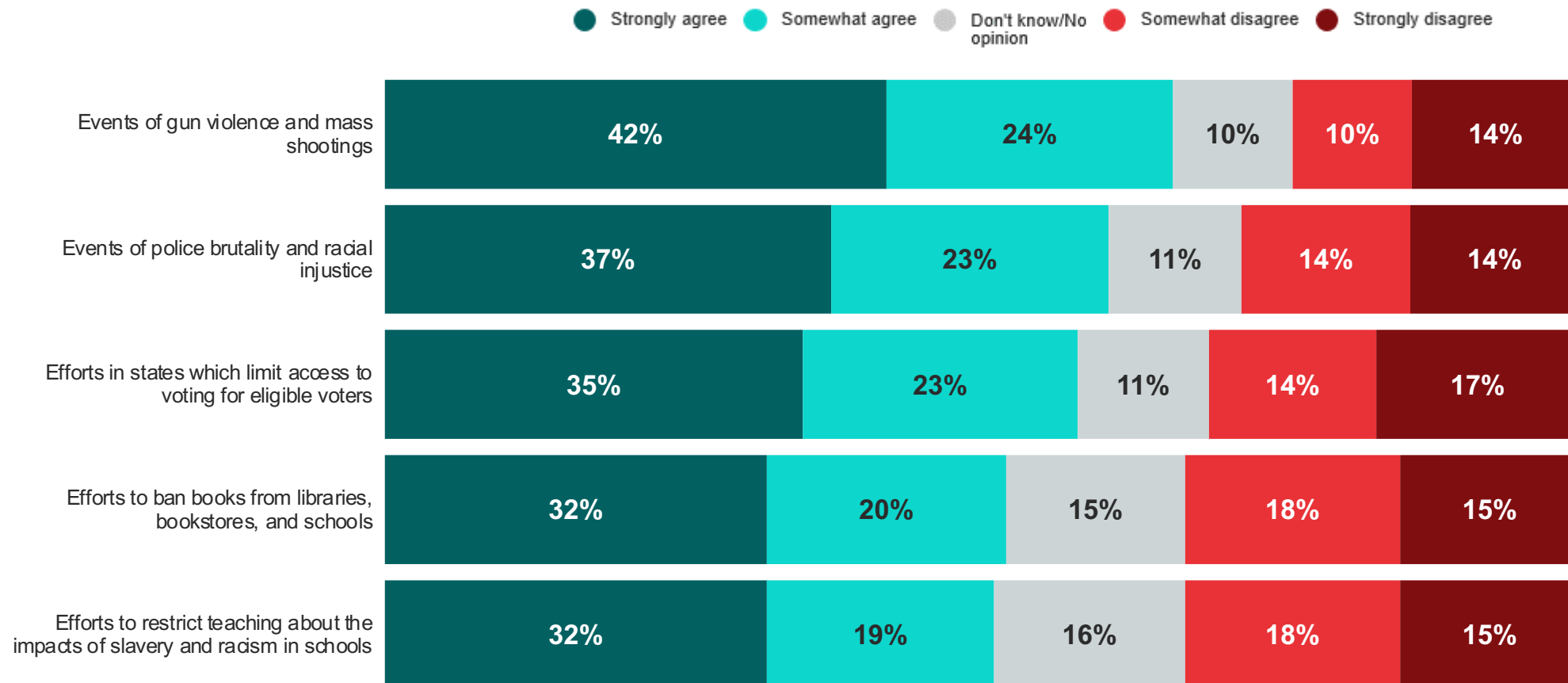
APPENDIX

Do you agree or disagree with the following statement? *State and local officials where I live have stepped up when the federal government has failed to act on social policies, such as abortion access and paid family and medical leave.*



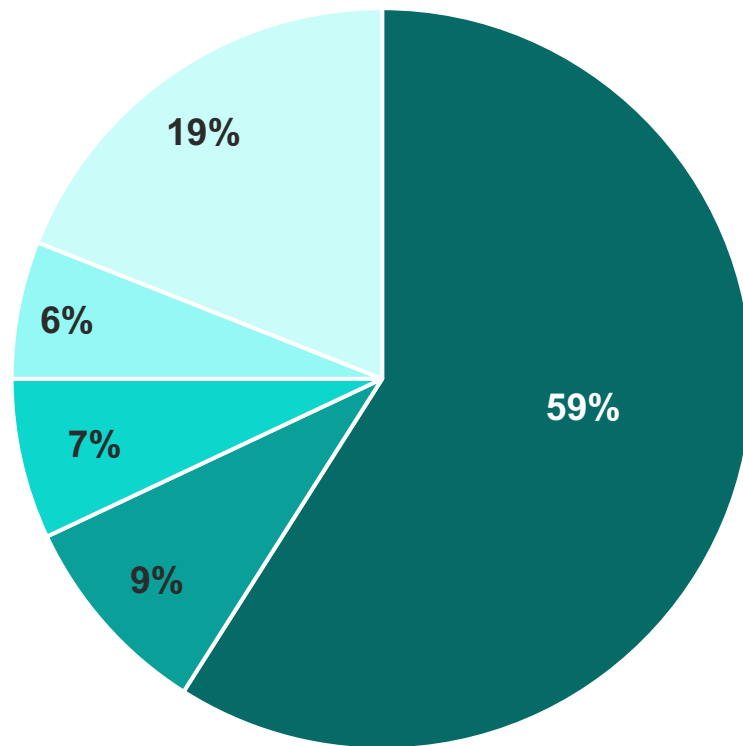
Do you agree or disagree with each of the following statements? *Companies should speak out against...*

AMONG ALL EMPLOYED ADULTS, n=1581



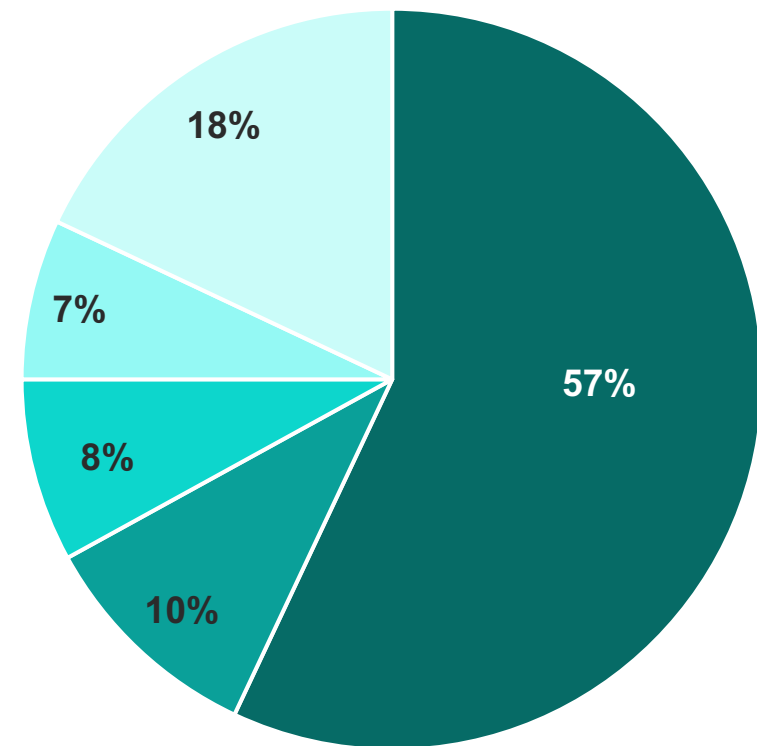
Which of the following best describes how you currently do your primary job?

100% in-person Mostly in-person, with some remote work About half in-person, half remote work Mostly remote work, with some in-person 100% remote work



Current workplace

To the best of your knowledge, which of the following describes how you anticipate you will do your job in the future?



Future workplace

Demographic Breakdown

Adults	Gender: Male	Gender: Female	Age: 18-34	Age: 35-44	Age: 45-64	Age: 65+	GenZers: 1997-2012	Millennials: 1981-1996	GenXers: 1965-1980	Baby Boomers: 1946-1964	PID: Dem (no lean)	PID: Ind (no lean)	PID: Rep (no lean)
2208	48%	52%	29%	17%	32%	22%	12%	31%	29%	28%	38%	32%	29%

Educ: < College	Educ: Bachelors degree	Educ: Post-grad	Income: Under 50k	Income: 50k-100k	Income: 100k+	Community: Urban	Community: Suburban	Community: Rural	4-Region: Northeast	4-Region: Midwest	4-Region: South	4-Region: West
65%	22%	13%	51%	34%	16%	32%	45%	23%	18%	21%	38%	24%

Employed Adults	Unemployed Adults	Students	Parents	Parents of Teens 14-18	Likely to Relocate	In-Person Workforce	Remote Workforce	White Collar Family	Blue Collar Family	Ethnicity: White	Ethnicity: Black	Ethnicity: Hispanic	Ethnicity: Other
72%	24%	4%	41%	15%	35%	42%	14%	38%	41%	62%	12%	17%	9%

