Employee Mobility Survey

Employees in 24 Countries Assess Employee Mobility for a Total Global Perspective – January 2013

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Introduction

The 2012 Canadian Employee Relocation Council’s (CERC) Global Mobility Survey marks the second year of the ground-breaking survey first conducted in 2011. The survey, conducted in partnership with Ipsos Global Public Affairs, reports on the attitudes of 12,827 working men and women in 24 countries towards international relocation for employment purposes. The Ipsos Global @dvisor poll was conducted between August 7th and August 21st, 2012.

This report provides a global perspective on the willingness of employees to move to another country for the purposes of employment. Given the labour shortages expected in many of the world’s developed (and developing) economies in the very near future, labour mobility will play a significant role in meeting those shortages.

Where possible the report has identified certain trends observed since the first issuance of the report in September 2011.

The global poll is sponsored by BDO, TheMIGroup, HSBC Bank Canada, Atlas Canada, Brookfield Global Relocation Services, Crown World Mobility, ERCO Worldwide, NEI Global Relocation and Weichert Relocation Resources Inc.

The report provides insights based on major industry grouping, country of residence and factors that would most likely motivate or incent a global employee to accept an employer sponsored relocation for employment purposes.
About the Canadian Employee Relocation Council

The Canadian Employee Relocation Council (CERC) is a not-for-profit organization dedicated to improving the mobility and deployment of human capital, which are vitally important to Canada’s future prosperity. Established in 1982, CERC represents the interests of its members on workforce mobility matters. Many of CERC’s members are listed in Canada’s Financial Post Top 500.

To further its objectives CERC offers professional development and education programs to its members and individuals employed in the mobility industry. In addition CERC conducts extensive research on trends that have an impact on workforce mobility.

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About Ipsos

Ipsos is an independent market research company controlled and managed by research professionals. Founded in France in 1975, Ipsos has grown into a worldwide research group with a strong presence in all key markets. In October 2011 Ipsos completed the acquisition of Synovate. The combination forms the world’s third largest market research company. With offices in 84 countries, Ipsos delivers insightful expertise across six research specializations: advertising, customer loyalty, marketing, media, public affairs research, and survey management.

Ipsos researchers assess market potential and interpret market trends. They develop and build brands. They help clients build long-term relationships with their customers. They test advertising and study audience responses to various media and they measure public opinion around the globe. Ipsos has been listed on the Paris Stock Exchange since 1999 and generated global revenues of €1,363 billion (1.897 billion USD) in 2011.

Visit www.ipsos-na.com to learn more about Ipsos’ offerings and capabilities.
Reasons for this Survey

A massive demographic shift is underway in many of the world’s developed nations. Shortages of skilled workers are impacting economic growth and business expansion around the globe. The supply of highly skilled workers is not growing fast enough to meet the increasing demand and talent management is an important priority for many of today’s CEOs.

“The success of any national or business model for competitiveness in the future will be placed less on capital and much more on talent ... the world is moving from capitalism to talentism”. Klaus Schwab, Founder and Executive Chairman, World Economic Forum, 2012.

A large part of the solution to these challenges, and securing a supply of skilled labour, lies in greater mobility of the workforce and increased economic migration. For many industries it is projected that future workforce growth will come from economic immigration and labour mobility. The question is will the workers in demand actually move or take an assignment away from their home country? This survey sets out to explore this question.

As the challenges of talent management become more complex with a dwindling supply of skilled workers, successful organizations will be those that can build a global workforce. While much is known about the trends in mobility benefits and policies within the business community, there is only a limited amount of research at a global level that informs decision makers about the expectations of employees.

Why this research is needed

- Employers are concerned about future sources of talent
- Today’s skilled workforce is global and it is mobile
- Understanding the needs of a global workforce is valuable currency in a global war for talent
- The poll complements the vast amount of employer based global mobility research in the marketplace
- There is no other comprehensive source of such research available

In 2011, the Canadian Employee Relocation Council (CERC) and internationally acclaimed Ipsos Global Public Affairs collaborated on the development of a global survey to measure attitudes about the willingness to move for employment purposes among working people. Conducted across 24 countries with 13,000 respondents, results of that survey found that just two in ten people would move to a new country for employment purposes. That initial report serves as an important benchmark in comparing the trends and changing expectations among global employees in 2012.

CERC and Ipsos conducted a second global survey in 2012 to gain further insights into employee attitudes about mobility and employment. Findings of the 2012 survey are presented in the following report.
Purpose and Methodology

The survey instrument is conducted monthly in 24 countries via the Ipsos Online Panel system. The countries reporting herein are Argentina, Australia, Belgium, Brazil, Canada, China, France, Germany, Great Britain, Hong Kong, Hungary, India, Indonesia, Italy, Japan, Mexico, Poland, Russia, Saudi Arabia, South Africa, South Korea, Spain, Sweden, Turkey and the United States of America. An international sample of 12,827 employees out of 18,872 adults aged 18-64 in the US and Canada, and age 16-64 in all other countries, were interviewed. Approximately 1000+ individuals participated on a country by country basis with the exception of Argentina, Indonesia, Mexico, Poland, Saudi Arabia, South Africa, South Korea, Sweden, Russia and Turkey, where each have a sample 500+.

Weighting was then employed to balance demographics and ensure that the sample's composition reflects that of the adult population according to the most recent country Census data and to provide results intended to approximate the sample universe.

The precision of Ipsos online polls are calculated using a credibility interval. In this case, a poll of 1,000 is accurate to +/- 3.5 percentage points and one of 500 is accurate to +/- 5.0 percentage points in their respective general populations. All sample surveys and polls may be subject to other sources of error, including, but not limited to coverage error, and measurement error. For more information on credibility intervals, please visit the Ipsos website at:

Key Findings for 2012

Among the findings of this year’s report are the following key themes:

- One quarter of employees, up by six per cent over 2011, could be enticed to accept a position in another country.

- Almost half (45%) of employees strongly agree that they could be convinced to take an international assignment
  - ‘if the incentive package from my employer was right’ or
  - ‘if my employer provides support for my spouse to get a job there, too’.

- Telecommunications and Construction industries are the top two industries in which employees are most likely to relocate for employment purposes.

- The top four countries of residence where employees are most likely to relocate from are: Mexico (39%), Argentina (36%), Turkey (34%) and Russia (34%).

- Top four destination countries for relocation are: United States of America (34%), United Kingdom (22%), Australia (20%) and Canada (20%).

- Key incentives that would motivate an employee to accept an employer sponsored relocation include:
  - a guaranteed option to return to their current role after two years, (45%),
  - airline tickets for family visits (43%),
  - a paid trip to visit the country of assignment in advance (43%) and
  - immigration assistance for their spouse or partner (42%).

- One third (34%) of global employees agree ‘there is nothing my employer could do to convince me to take an international assignment’.
Executive Summary

One quarter (25%) of employees in 24 countries—up six points from 19% last year—say they would be ‘very likely’ to take a full-time job in another country for two to three years with a 10% pay increase.

The poll of 12,827 employees in 24 countries is the second fielding of the employee relocation survey first conducted in August 2011.

But while one quarter of current employees are ready to make the move, almost half (45%) of current global employees strongly agree that they could be convinced to take an international assignment ‘if the incentive package from my employer was right’ or ‘if my employer provides support for my spouse to get a job there, too’. Alternatively, one third (35%) of global employees agree ‘there is nothing my employer could do to convince me to take an international assignment.’

Further, four in ten (42%) global employees ‘strongly agree’ ‘the country that the foreign assignment would send me to is a major factor in my decision to relocate or not’. For the first time in the annual survey cycle, employees were asked to choose their top countries of possible relocation: the United States (34%), the United Kingdom (22%), Australia (20%), Canada (20%), Switzerland (16%) and Germany (15%).

Global employees also report they would be most motivated to move abroad for the new job offer by the following incentives: a guaranteed option to return to their current role after two years, (45%), airline tickets for family visits (43%), a paid trip to visit the country of assignment in advance (43%) and immigration assistance for their spouse or partner (42%).
A Global Workforce Open to Mobility: Digging Deeper into the Details...

Employees in 24 countries were asked to consider the opportunity of a full-time job available in another country at least three to five hours away by plane for anywhere between two or three years with a minimum 10% increase in pay.

One quarter (25%) of those surveyed indicate they are ‘very likely’ to consider moving to this new job, six points more than in August 2011. This year, three in ten (32%) are ‘somewhat likely,’ one quarter (24%) are ‘not very likely’ and two in ten (19%) say they are ‘not at all likely.’

- In Canada, two in ten (18%--up eight points from last year at 10%) are ‘very likely’, three in ten (28%) are ‘somewhat likely,’ one quarter (27%) are ‘not very likely’ and two in ten (26%) say they are ‘not at all likely’ to accept an international move.

Employees identified their industry/sector in this iteration of the survey allowing for some new level of analysis on these potentially mobile employees. The data show that those working in the fields of telecommunications and information technology (28%) and construction (28%) are most inclined to say they are ‘very likely’ to consider the move, followed by those working in the commercial/retail (25%), education (23%) and medical (23%) sectors.

As for the countries where immediately mobile workers are likely to hail from, four in ten (39% + 5 points compared to last year) are from Mexico followed by Argentina (36% +15), Turkey (34% +3), Russia (34% +3), Indonesia (33% +12) and South Africa (33% +12). Those least likely to wish a move are from Japan (10%-1), Belgium (13% +2), France (14% +4) and South Korea (15% -5).

Demographically, and considering the entire sample on a global basis, those cohorts most likely to be ‘very likely’ to take the job opportunity are: a senior executive/decision maker at their work (30%); those most likely under the age of 35 (28%); those who own a business (28%); men (27%); those with a low income (27%); and those who are not married (27%).
More Employees ‘Could be Convinced’…

It’s interesting to note that while it would appear that 25% of current workers would take little coaxing to move to another place, this number could rise another 20 points with some extra incentives being put in place: almost half (45%) of global employees ‘strongly agree’ they could be convinced to take an international assignment ‘if the incentive package from my employer was right’ or ‘if my employer provides support for my spouse to get a job there, too’ (41% strongly agree). A minority (34%) of global employees say ‘there is nothing my employer could do to convince me to take an international assignment’ (13% strongly agree, 22% somewhat agree).

Geography Matters…

Four in ten (42%) of global employees ‘strongly agree’ that ‘the country that the foreign assignment would send me to is a major factor in my decision to relocate or not’. One third (34%) of employees indicate the country they would most want to relocate to is the United States, followed by the United Kingdom (22%), Australia (20%), Canada (20%), Switzerland (16%) and Germany (15%).

Destination preferences appear to depend on the current region of origin of the employee. On the aggregate level, North Americans would most prefer to move to Australia (33%) or the UK (28%). Those from Latin America would most prefer to go to the United States (42%), Canada (25%) or Spain. Employees from the Middle East and Africa would most likely choose the United States (43%) or the United Kingdom (29%). Europeans would most prefer the United States (29%), the UK (20%), Australia (20%) or Switzerland (20%) and those from Asia-Pacific would most prefer to move for work to the US (27%), the UK (24%) or Singapore (22%).

- In Canada, employees are most likely to pick the United States (37%) as their top pick, followed by Australia (35%), the United Kingdom (24%), France (20%) or New Zealand (28%).

Incentives to Move Abroad…

The data suggest there are some incentives that employers could calibrate to encourage a move to that new international job. Nearly half (45%) of employees surveyed say ‘a guarantee that you could move back to your current role after 2 years with further relocation assistance’ would make them ‘much more likely’ to take the job, followed by 43% who would choose for ‘you/members of your immediate family would each get one round trip airfare per person to either’, 43% who would select ‘a trip to the country before the assignment so I see what the country is like, paid for by my employer’, 42% who would want their employer to ‘provide immigration assistance for your spouse in order that they could obtain employment’, 42% who would want ‘paid language training if necessary’, 41% who would want their employer to ‘provide you with education courses to upgrade your skills’ and 41% who’d like another ‘10% pay raise’.

Understanding Why: A Look at Canadians…

Canadians were asked to share their views on the motivations behind likelihood to move abroad for work. Those who indicated they are likely to move were asked to reflect on what barriers would prevent them from actually taking a foreign assignment. The number-one factor cited by Canadians is
family/having young children (42%), followed at a great distance by the destination country (6%), money/need a large pay increase (5%), political unrest (4%) and safety concerns (4%).

Those who indicated they are ‘unlikely’ to move were asked to describe what incentives might make them consider the move after all. One third (35%) say a raise in pay would make them consider it. Only 5% indicate they would be motivated by the type of job/experience, if lodgings were included and if family is allowed to come. Four in ten (41%) say nothing would make them consider it.
% of Employees ‘Very Likely’ to Move Abroad
Top Choices for Global Destination

- United States: 34%
- United Kingdom: 22%
- Australia: 20%
- Canada: 20%
- Switzerland: 16%
- Germany: 15%
- France: 13%
- New Zealand: 12%
- Italy: 11%
- Spain: 9%
- Singapore: 9%
- Japan: 8%
- Sweden: 8%
- United Arab Emirates: 7%
- Netherlands: 7%
- Norway: 7%
- Austria: 6%
- Hong Kong: 6%
- Brazil: 5%
- Ireland: 5%