

Global Mobility Survey

Employees in 20 Countries Assess Employee Mobility for a Total
Global Perspective – June 2017

Canadian Employee Relocation Council
Executive Summary



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Introduction

The 2017 Canadian Employee Relocation Council's (CERC) Global Mobility Survey marks the third edition of the ground-breaking survey first conducted in 2011. The 2017 survey, conducted in partnership with Ipsos Global Public Affairs, reports on the attitudes of 10,091 working women and men in 20 countries towards international relocation for employment purposes. The Ipsos Global Advisor poll was conducted between February 17th, 2017 and March 3rd, 2017.

Once again, this report provides a global perspective on the willingness of employees to move to another country for the purposes of employment. Given the growing skills shortages being experienced in many regions of the world, labour mobility is playing an increasingly important role in meeting those shortages.

Where possible the report has identified certain trends observed since the findings of the 2012 study. The 2017 survey included several new questions relating to immigration, social security and education that were not covered in the 2012 report.

The global poll is sponsored by BDO Global, the Council for Global Immigration, Crown World Mobility, Dwellworks LLC, EuRA, Randstad Holding NV, TheMIGroup, and Weichert Workforce Mobility.

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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Leadership for Workforce Mobility

About Ipsos

Ipsos ranks third in the global research industry. With a strong presence in 87 countries, Ipsos employs more than 16,000 people and has the ability to conduct research programs in more than 100 countries.

Founded in France in 1975, Ipsos is controlled and managed by research professionals. They have built a solid Group around a multi-specialist positioning – Media and advertising research; Marketing research; Client and employee relationship management; Opinion & social research; Mobile, Online, Offline data collection and delivery.

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Reasons for this Survey

Demographic shifts of unprecedented proportions are underway in many of the world's developed nations. At the same time rapid advances in technology are creating new demands for talent and disrupting many workplaces. Combined, these complex forces are making it increasingly difficult for companies to manage and set strategy.

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 access to key talent is a priority for many of today's CEOs. Some 77 per cent of global CEOs worry that skills shortages could impair their company's growth.¹

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 countries and industries it is projected that future workforce growth will largely come from immigration and labour mobility. And yet, in many areas of the world, there is a growing national opposition to immigration and the freer movement of workers.

*"Unprecedented skills shortages are the No. 1 constraint on economic activity. The limits on immigration will merely exacerbate the problem."*²

A further challenge is whether the workers in demand will 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 and indeed nations will be those that can attract and build a global workforce.

*In an economy driven by innovation, knowledge and culture, money follows talent."*³

While much is known about the supports and benefits provided by employers those may not be consistent with the needs and expectations of the modern workforce.

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 quest for talent
- The poll complements the vast amount of employer based global mobility research in the marketplace
- No other comprehensive source of such research is available

The Canadian Employee Relocation Council (CERC) and internationally acclaimed Ipsos Global Public Affairs collaborated in 2011 and 2012 to measure attitudes about the willingness to move for employment purposes among working people.

In 2017 CERC and Ipsos Global Public Affairs again collaborated to conduct a survey across 20 countries with 10,096 respondents. Findings of the 2017 survey are presented in the following

¹ PwC 20th CEO Survey, 2017

² David Rosenberg, Chief Economist, Gluskin Sheff + Associates

³ Financial Times, July 2016

report. Where possible results have been compared against those reported in the 2012. These initial reports serve as an important benchmark in comparing the trends and changing expectations among global employees in 2017.

Purpose and Methodology

The survey instrument is conducted monthly in 20 countries via the Ipsos Online Panel system. The countries reporting herein are Argentina, Australia, Brazil, Canada, China, France, Germany, Great Britain, India, Italy, Japan, Mexico, Poland, Russia, South Africa, South Korea, Spain, the Netherlands, Turkey and the United States of America. An international sample of 10,091 employees out of 14,516 adults aged 18-64 in the US and Canada, and age 16-64 in all other countries, were interviewed. Approximately 300-500 individuals participated on a country by country basis with the exception of Australia, Canada, China, France, Germany, Great Britain, Japan, Spain, and the United States where each have a sample of 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 300 is accurate to +/- 6.5 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:

http://ipsos-na.com/dl/pdf/research/public-affairs/IpsosPA_CredibilityIntervals.pdf

Key Findings for 2017

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

- ❖ Almost two in ten (18%) of employees in 20 countries say they would be 'very likely' to temporarily relocate for up to 2 years and take a full-time job in another country with a 10% pay increase, down seven points from 2012 (25%).
- ❖ In addition to the eighteen percent (18%) who are 'very likely' to temporarily relocate, twice as many could be convinced if the incentive package from their employer was right (37% strongly agree; -8 points compared to 2012) or if their employer provides support for their spouse to get a job there too (36%; -5 points compared to 2012).
- ❖ Across most industries, there is less willingness to relocate compared to 2012. Specifically, those employed in telecommunications/IT (20%; -8 points compared to 2012), medical (15%; -8 points), government (14%; -7 points), and education (18%; -5 points) are significantly less inclined to relocate than in 2012.
- ❖ As for the countries where immediately mobile workers are likely to hail from, close to four in ten (37%; +10 points compared to 2012) are from Brazil, followed by closer to one third from Mexico (35%; -4 points) and South Africa (35%; +2 points), and slightly fewer from Argentina (30%; -6 points).
- ❖ Top four destination countries for relocation are: United States of America (30% down 4 points since 2012), Canada (22%; +2 points; up from fourth position in 2012), the United Kingdom (19%; -3 points), and Australia (19%; -1 point).
- ❖ 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, (36%; -9 points since 2012)
 - paid language training if necessary (36%; -6 points)
 - airline tickets for family visits (35%; -8 points)
 - immigration assistance for their spouse or partner (35%; -7 points)
- ❖ Four in ten (40%) global employees agree 'there is nothing my employer could do to convince me to take an international assignment', an increase of five points over 2012.
- ❖ Global employees place a high value on the kind of country they are most likely to move to:
 - High quality and accessible health care system - 82%
 - Is friendly to immigrants - 77%
 - Has a good social security system - 77%

Executive Summary

Almost two in ten (18%) of employees in 20 countries say they would be ‘very likely’ to take a full-time job in another country for up to two years with a 10% pay increase. By comparison, in 2012, one quarter (25%) of employees said they would be ‘very likely’ to take a full-time job in another country (a decline of 7%).

The poll of 10,096 employees in 20 countries is the third fielding of the employee relocation survey first conducted in August 2011, and repeated in October 2012.

But while nearly two in ten (18%) employees are ready to make the move, this proportion can as much as double when extra incentives are put in place, specifically, a guaranteed option to return to their current role after two years (36%; -9 points compared to 2012), or if their employer provides the necessary support to enable their spouse to get a job there too (36%; -5 points).

The 2017 survey also uncovered a growing reluctance among employees to move, with four in ten (40%) global employees agreeing ‘there is nothing my employer could do to convince me to take an international assignment’, an increase of five points versus 2012 (35%).

In 2017 Global employees were asked about their level of agreement with new statements pertaining to immigration, healthcare, education, social security, taxation, and the economy. Global employees are most likely to agree that they would only relocate to a country that has a high quality and accessible health care system (82% strongly/somewhat agree); is friendly to immigrants (77%) and has a good social security system (77%). Agreement is lower, but still strong, that they would only relocate to a country that has a high quality and accessible educational system (72%); an innovative economy (70%); and a low tax burden (64%).

Global employees from the Middle East and Africa specifically are more likely than employees from all other regions to agree (‘strongly/somewhat agree’) that they would only relocate to a country that has an innovative economy and a high quality and accessible educational system.

Nearly four in ten (37%) global employees ‘strongly agree’ that the country the foreign assignment sends them to is a major factor in their decision to relocate (or not), down five points from 2012 (42%). Compared to 2012, less say they want to relocate to the United States (30%; -4 points compared to 2012), though at three in ten it remains the top choice in terms of the country global employees most want to relocate to, followed by Canada (22%; +2 points and up from fourth position in 2012), the United Kingdom (19%; -3 points), Australia (19%; -1 point), Germany (17%; +2 points), and Switzerland (16%; no change vs. 2012).

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, (36%; -9 points since 2012), airline tickets for family visits (35%; -8 points) and immigration assistance for their spouse or partner (35% down 7 points).

Moving Away from Globalization: Global Employees Less Inclined to Move Abroad than Five Years Ago

Eighteen percent (18%) of employees in 20 countries say they would be 'very likely' to temporarily relocate for up to 2 years and take a full-time job in another country with a 10% pay increase, down seven points from 2012 (25%). Over one quarter (27%) of employees are 'somewhat likely' while just under one quarter (23%) are 'not very likely' and three in ten (31%) say they are 'not at all likely' to relocate. About the same proportion (17%) indicate they would be willing to relocate permanently in 2017. If there is a guarantee of a fulltime job the proportion indicating they are 'very likely' to relocate increases to almost three in ten (28%) but drops significantly if there is no guarantee of fulltime employment (7%).

Employees identified their industry/sector in this iteration of the survey allowing for some analysis of these potentially mobile employees. The data show that those working in the fields of marketing/advertising/public relations (32%), arts/entertainment/recreation (31%), aerospace/defense (31%), mining/natural resources/forestry (30%), and the oil and gas industry (29%) are the most inclined to say they are 'very likely' to consider temporary relocation for up to 2 years with a 10% increase in salary.

Across most industries, there is less willingness to relocate compared to 2012. Specifically, those employed in telecommunications/IT (20%; -8 points compared to 2012), medical (15%; -8 points), government (14%; -7 points), and education (18%; -5 points) are significantly less inclined to relocate than in 2012.

As for the countries where immediately mobile workers are likely to hail from, close to four in ten (37%; +10 points compared to 2012) are from Brazil, followed by closer to one third from Mexico (35%; -4 points) and South Africa (35%; +2 points), and slightly fewer from Argentina (30%; -6 points).

In terms of demographics, those who are most enticed by the prospect of temporary relocation for up to 2 years include: senior executives/decision makers at their work (24%; -6 points compared to 2012), those under the age of 35 (25%; -3 points), business owners (23%; -5 points), and those who are unmarried (22%; -5 points).

Incentives to Move Abroad: Enticing, but less Enticing than 5 years ago...

While nearly two in ten (18%) employees in 20 countries say they would be 'very likely' to temporarily relocate for up to two years with little incentives beyond a 10% pay increase, this proportion can as much as double when some extra incentives are put in place, specifically, a guaranteed option to return to their current role after two years (36%; -9 points compared to 2012), paid language training if necessary (36%; -6 points), airline tickets for family visits (35%; -8 points), immigration assistance for their spouse or partner (35%; -7 points), and a 10% pay raise (34%; -7 points). However, global employees are less motivated to relocate by virtually all incentives than they were in 2012.

Relocation and Government Policy

New questions were asked in the 2017 survey to gauge how important certain government policies are in the decision-making process for employees considering moving abroad.

Global employees were asked about their level of agreement with new statements in 2017 pertaining to immigration, healthcare, education, social security, taxation, and the economy.

Global employees are most likely to agree that they would only relocate to a country that has a high quality and accessible health care system (82%); is friendly to immigrants (77%); and has a good social security system (77%).

Agreement is lower, but still strong, that they would only relocate to a country that has a high quality and accessible educational system (72%); an innovative economy (70%); and a low tax burden (64%).

Global employees from the Middle East and Africa specifically are more likely than employees from all other regions to agree ('strongly/somewhat agree') that they would only relocate to a country that has an innovative economy and a high quality and accessible educational system.

Geography Matters... United States Still Top Choice for Relocation, But Less So Than 5 Years Ago...

Nearly four in ten (37%) global employees 'strongly agree' that the destination country is a major factor in their decision to relocate (or not), down five points from 2012 (42%).

Compared to 2012, less say they want to relocate to the United States (30%; - 4 points compared to 2012), though at three in ten it remains the top choice in terms of the country global employees most want to relocate to, followed by Canada (22%; +2 points, and up from fourth position in 2012), the United Kingdom (19%; -3 points), Australia (19%; -1 point), Germany (17%; +2 points), and Switzerland (16%; no change vs. 2012).

Destination preferences appear to vary little across the globe with the United States consistently ranked as the preferred option across all regions of the world save for North America, among others.

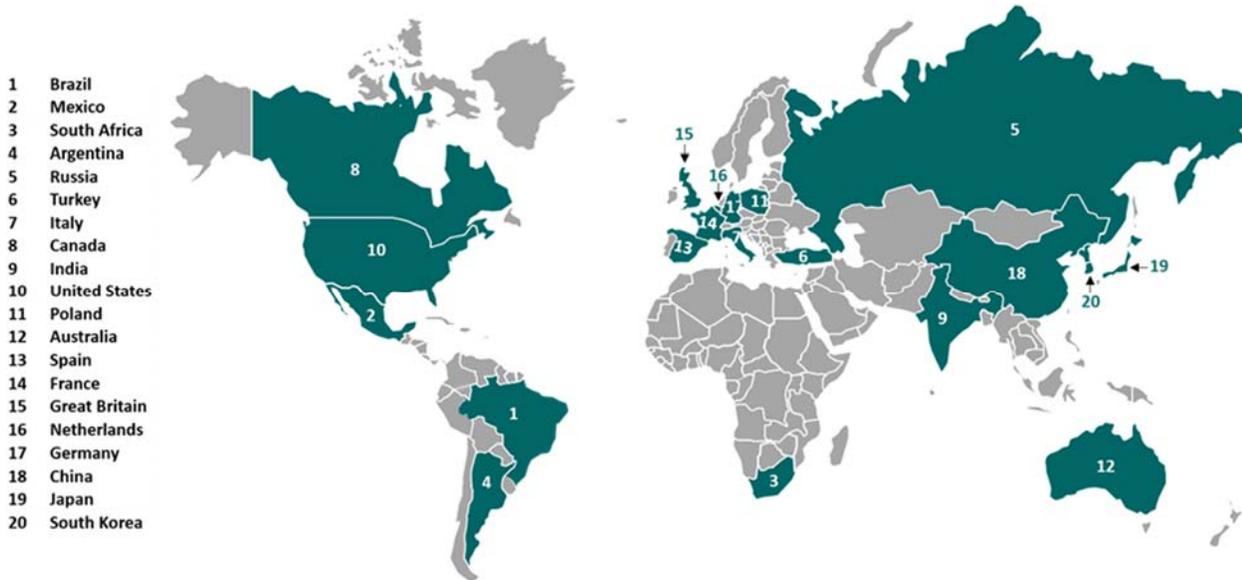
On the aggregate level, North Americans would most prefer to move to Australia (33%; no change vs. 2012) or the United Kingdom (31%; +3 points). Europeans most prefer the United States (24%; -5 points), Germany (20%; +3 points), Switzerland (20%; no change vs. 2012), Australia (20%; no change vs. 2012), Spain (19%; +6 points); or Canada (19%; +1 point).

Those from Latin America would most prefer to go to the United States (35%; -7 points), Canada (32%; +7 points), or Spain (30%; +6 points).

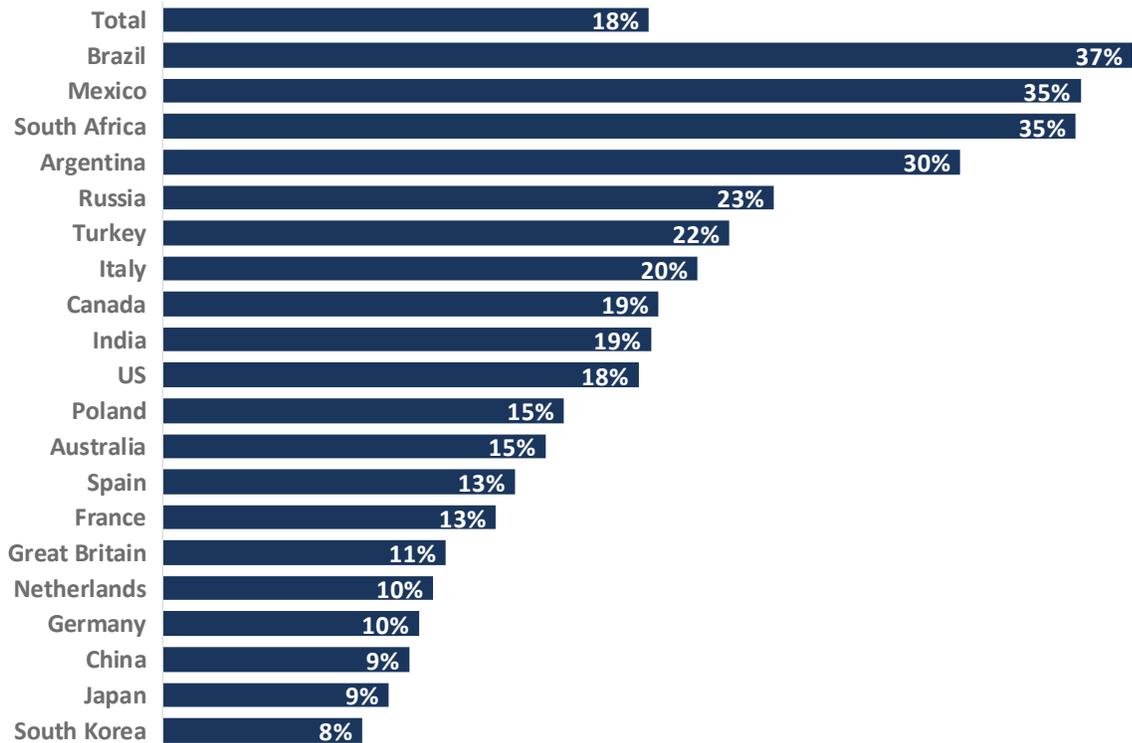
Employees from the Middle East and Africa are still most likely to choose the United States, although significantly less so (36%; -7 points) compared to five years ago, followed by Australia (26%; +6 points), the United Kingdom (25%; -4 points), and Canada (24%; +5 points).

Lastly, those from Asia-Pacific are most likely to choose the United States (36%; -1 point), followed by Canada (23%; +2 points), and the United Kingdom (23%; -1 point).

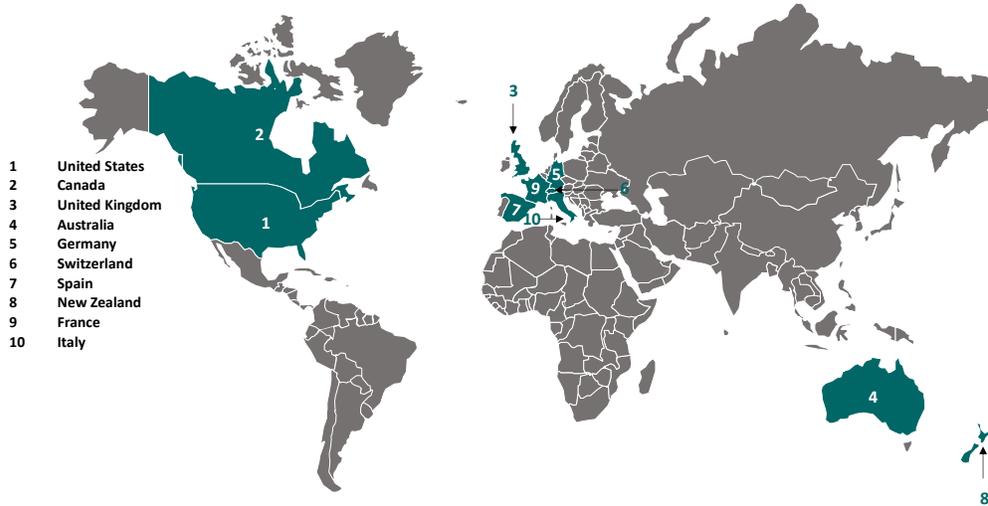
% of Employees 'Very Likely' to Temporarily Relocate



- 1 Brazil
- 2 Mexico
- 3 South Africa
- 4 Argentina
- 5 Russia
- 6 Turkey
- 7 Italy
- 8 Canada
- 9 India
- 10 United States
- 11 Poland
- 12 Australia
- 13 Spain
- 14 France
- 15 Great Britain
- 16 Netherlands
- 17 Germany
- 18 China
- 19 Japan
- 20 South Korea



Top Choices for Global Destination



	First Choice	Second Choice	Third Choice	Net	2012 Net	Change
United States	10%	10%	10%	30%	34%	-4%
Canada	7%	8%	7%	22%	20%	2%
United Kingdom	7%	6%	6%	19%	22%	-3%
Australia	6%	7%	6%	19%	20%	-1%
Germany	6%	6%	5%	17%	15%	2%
Switzerland	6%	5%	5%	16%	16%	n/c
Spain	5%	5%	4%	14%	9%	5%
New Zealand	5%	4%	4%	13%	12%	1%
France	4%	5%	4%	13%	13%	n/c
Italy	4%	4%	4%	12%	11%	1%

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