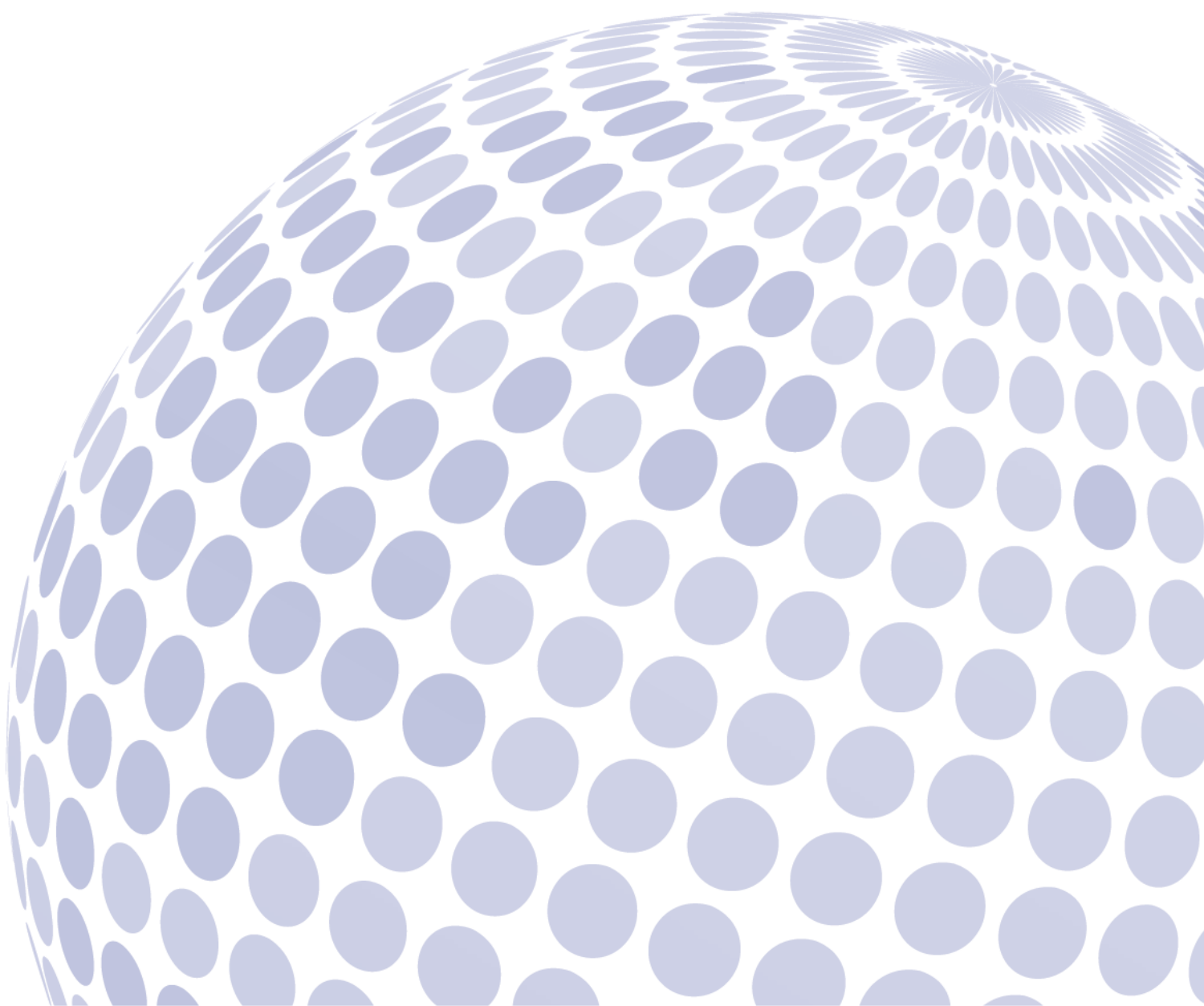# GLOBAL TALENT MOBILITY SURVEY 2011
WHAT ATTRACTS THE WORLD'S WORKFORCE?

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THE NETWORK
Global leader in online recruitment

iG! Intelligence Group

Foreword

The labour market globalises with high speed

International mobility has grown tremendously with the increase in the globalisation of companies and the opening up of world markets. Companies are facing a growing demand on their resources in order to manage a transient workforce at every level of the company.

The management of international mobility is no longer a question of sourcing an airline ticket, a hotel and an expense account. Companies are requiring more flexibility from their employees as they increase their cross border business. These missions are often critical to the success of projects as they involve a transfer of key skills, experience, management and knowledge.

Companies must assess the overall value of the assignment and provide suitable investment in the relocation management to ensure its success.

One of the major obstacles in international recruitment is the lack of knowledge with regard to the global labour market. Where do you find the talent and will employers be able to reach and move them internationally? With this in mind, we, along with the Intelligence Group, want to facilitate a greater understanding on this issue and so, commissioned research to provide more transparency in the international labour market. Our main objective for this is to help employers – and countries – to better understand the market and enable them to be in a better position to attract international talent.

The research follows two previous waves commissioned by the Network which looked at eight countries in 2006 and forty in 2009. This research is the most comprehensive yet, and will encompass thorough coverage of BRIC, PIIGS and every European country, meaning that the survey was programmed in twenty-six languages and customised for each of the 66 countries involved – and, importantly, questioned over 162,000 individuals. Never before has research of this magnitude been carried out in the field of international labour market mobility.

The economic potential of globalisation is ultimately dependent on the international mobility of highly talented individuals that transfer knowledge, new technologies, ideas, business capacities, and other creative capabilities. Developing countries, advanced economies and the companies within these regions may all gain from this mobility if it is effectively and smartly managed.

Mike Booker, Managing Director of The Network

Introduction

For a long time, labour mobility has been a supply side phenomenon: with the *employee* taking the initiative and deciding whether or not to make the move. Whilst the global economic situation has changed, it's still as vital as ever for recruiters to attract the best talent, wherever they are in the world.

Talent is becoming scarce

In 2011, the world dramatically changed. The financial crisis of 2009/10 left its mark on the global economy and its effects are still being felt by those countries struggling to restore their own local labour market. In countries where the economic situation is currently poor, the willingness of workers to find jobs abroad is often conversely high; however, a bad economy doesn't necessarily mean that more jobseekers will look for work internationally. This has been demonstrated by some Southern European countries where unemployment rates are high but people are actually less willing to work abroad in 2011 compared to 2009. Equally candidates showed no specific preference for relocating to countries with strong economic performance. In addition to this, new businesses and consumer markets are appearing across the world, forcing both multinational companies and domestic ones to evaluate their growth plans and adapt them in response to new opportunities.

The need for large-scale international research

Businesses are in need of skilled workers and want to recruit the best talent in the world; however, knowing exactly where to find them and how to attract them can sometimes prove difficult. With this in mind, Intelligence Group has, in close cooperation with The Network, launched a third wave of international research: the Global Talent Mobility Survey (GTMS).

The GTMS is a follow-up of the large-scale international research carried out in 2006 and 2009. This began with research across eight European countries: Sweden, Denmark, Belgium, the UK, Germany, Italy and the Netherlands, and we immediately saw the need for more transparency in the international recruitment landscape. The European Union was expanding eastwards, there were both peaks and troughs in the demand for talent, and the internet became increasing important in both attracting and retaining talented workers. In 2009, employers were dealing with a worldwide financial crisis and the viability of their own business strategies, becoming increasingly desperate to attract talent from around the world that fit their criteria.

Our Global Talent Mobility Survey

The GTMS enables employers and recruiters to get a better understanding of how their national labour market works, and how it relates to the dynamics of the global labour market by looking at the latest recruitment trends and developments. Our Global Talent Barometer, an-easy-to-use tool enabling you to get the most important information about target groups, is at your disposal. As talent is becoming scarce, in particular in IT, engineering, research & development and management, knowledge about the global labour market is indispensible, helping you to understand how to find and attract international talent.

New questions have been added to the questionnaire in order to make the research more valuable. From now on, it is possible to receive data for a specific target group on a very niche level, and to get insight into the companies people want to work for abroad. Global mobility patterns can be mapped out and the ambitions of people wishing to move to other parts of their own country can be tracked.

Methodology

The third wave of international research in 2011 has exceeded the scope of that conducted in 2009 by collecting data from 66 countries. Approximately 75 percent of the G20 countries, as well as the BRIC countries, PI(I)GS[1] countries and developing economies in both Asia and Latin-America have joined the research[2]. In total, we were able to create a database with more than 162,000 respondents, weighted by the size of the labour force of each country according to data taken from the CIA World Factbook 2011.

By using the extensive reach of The Network's partner job boards, the survey covers 66 countries, distributing the questionnaire among the visitors to those job boards. In exceptional cases, people were questioned by phone. In total, the questionnaire consisted of 35 questions, including single responses and multiple responses as well as open questions and those with predefined categories. It took approximately ten weeks to collect the data, monitoring it weekly.

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[1] Appendix two includes an explanation on these terms.

[2] Appendix one gives an overview of all the participating countries.

Chapter 1: Trends and developments

Four major trends characterise the current global labour market, providing insight into how international mobility works. These are: higher international mobility, new preferences for relocation, international careers and international workers opting for a fixed contract. Each of these trends will be described, showing how the international landscape has changed over the last five years. The situation for BRIC, G20 as well as the PI(I)GS countries in particular, will be highlighted.

Higher international mobility

In 2011, workers were keener than ever before to move internationally for a new job. On a global scale, more than two-thirds of the people surveyed wanted to work abroad. This is shown in figure 1.1 below. It includes the average willingness to consider working abroad in Europe, encompassing nine countries: Belgium, Denmark, France, Germany, Italy, the Netherlands, Norway, Sweden and the United Kingdom[3].

The French people are the most mobile workers, followed by Britons. The Italian, German and Dutch people are the least inclined to look for a new job outside their own country, although numbers are still very high.

Figure 1.1 Willingness to work abroad within nine European countries on average in 2011, compared to 2009 and 2006 (including the global average of 2011)
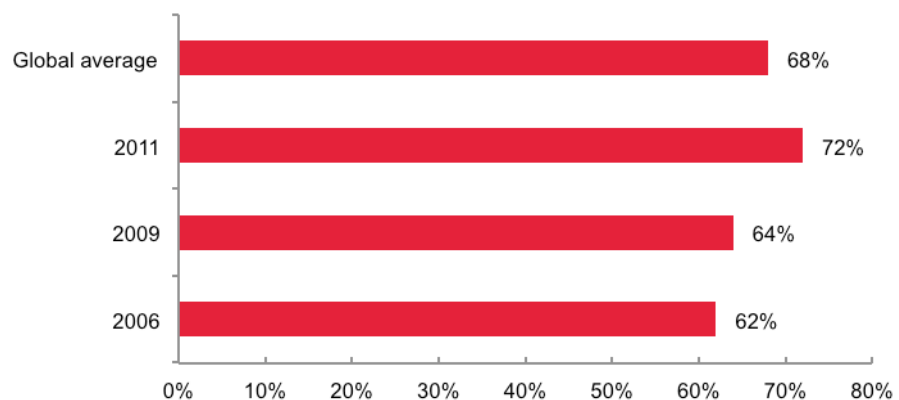
That's why European people want to work abroad

The main reason that workers across these nine European countries want to look internationally for a new job is the 'opportunity to broaden their experiences'. In second place, we found that 'career opportunities' were cited as a key reason to emigrate, followed by 'challenging oneself'. In 2006, these reasons also ranked highly. In 2009, reasons like 'having a better standard of living' and 'meeting new people' were part of the top 5 reasons to go abroad, but they have become less important in 2011, instead being replaced with the desire to 'acquire work experience' or simply 'start an international career'. This means people are driven by a desire to get the most out of their own career.

How the economic climate influences mobility in a two-way direction

Workers living in one of the countries belonging to the G20, BRIC and PI(I)GS show a different willingness to work abroad. Globally, 68 percent of people said that they wanted to work abroad, with only 14 percent not wishing to do so. Figure 1.2 shows that Europeans are by far the most willing to work abroad, standing in sharp contrast to those living in one of the PI(I)GS countries. Of the candidates living in one of the PI(I)GS countries and willing to work abroad, most (44%) are prepared to leave their country for more than five years. This percentage is the same for people living in Europe, but higher than the percentages seen for the people of the BRIC and the G20 countries. On a global scale, 37 percent of people want to work abroad for more than five years.

We can conclude that a country's economic climate relates to the willingness of its workforce to move internationally to find work, and the longing for better career opportunities and a better situation relates to their longer-term migration. On a worldwide scale, the percentage of people willing to go abroad for more than five years fell 20 percentage points between 2009 and 2011. Overall, people are more eager to move abroad for a short period of time, looking to return home if a better career opportunity arises. This is called 'two-way traffic'.

Figure 1.2 Willingness to work abroad on a global scale, within Europe and for the G20, BRIC and PI(I)GS countries on average in 2011
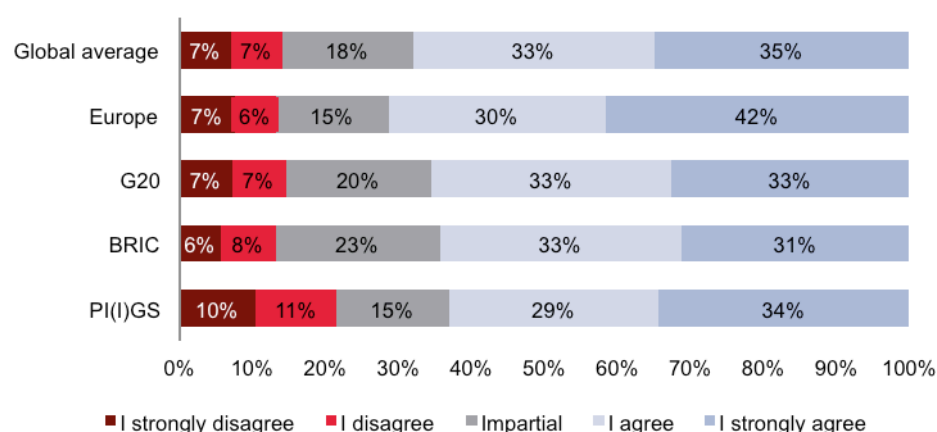
New preferences for relocation

New ranking of countries indicates diversified preferences

The increased willingness to work abroad for the workforces of the nine European countries we surveyed between 2006 and 2011 goes hand in hand with the new preferences for destination countries. Most of the differences can be observed between 2006 and 2009, with Switzerland and Australia becoming part of the top 5 most popular countries to relocate to while both Spain and France fell out of the top 5 in 2009. In 2011, only the order of countries changed with the USA keeping the top spot as the most popular destination country.

Table 1.1 Top 5 destination countries for our polled nine European countries between 2006 and 2011

2006	2009	2011
USA	USA	USA
United Kingdom	United Kingdom	Switzerland
France	Canada	Canada
Spain	Switzerland	Australia
Canada	Australia	United Kingdom

The top 5 destination countries on a worldwide scale have barely changed. The USA, United Kingdom and Canada were still the most popular

destination countries in 2009 and 2011, followed by Australia and Germany (see table 4.1).

The situation is different when having a look at the top 5 destination countries for BRIC, G20 and PI(I)GS countries in 2011. Germany is a popular destination country for the BRIC countries and Australia is a favourite country to move to for G20 countries. The ranking for the PI(I)GS countries differs the most, with the United Kingdom and Germany being the two most popular destination countries. The USA holds the third position, followed by France and Switzerland. These results show us that both Western economies and upcoming economies like Singapore are highly attractive with the people of the PI(I)GS countries, narrowing their focus on Europe.

Table 1.2 Top 5 destination countries for the BRIC, G20 and PI(I)GS countries in 2011

BRIC	G20	PI(I)GS
USA	USA	United Kingdom
United Kingdom	United Kingdom	Germany
Canada	Canada	USA
Singapore	Australia	France
Germany	Singapore	Switzerland

Top economic cities dominate the international landscape

The destination city rankings also differed in 2011. Globally, Singapore gained in popularity, holding the third position in the top 5 cities. The popularity of both Sydney and Dubai lessened, representing the fifth and sixth positions (respectively) in the 2011 rankings compared to the third and fifth position in 2009. London, New York and Paris are still part of the top 5 global destination cities, indicating continued popularity within some of the world's most important metropolitan areas.

The most striking results can be found for the PI(I)GS countries (see table 1.3). While the international workforce of both the BRIC and the G20 countries have a strong preference for London, New York, Singapore, Paris and Sydney, showing a strong similarity with the global ranking, people living in PI(I)GS countries also favour cities like Berlin and Barcelona. While Berlin is not very surprising, given the inclination to work in Germany, Barcelona is more of a surprise considering the current economic situation in Spain.

Table 1.3 Top 5 destination cities for the BRIC, G20 and PI(I)GS countries in 2011

BRIC	G20	PI(I)GS
London	London	London
New York	New York	Paris
Singapore	Singapore	New York
Paris	Paris	Berlin
Sydney	Sydney	Barcelona

International career as a main driver

In alignment with academic research executed by Tilburg University in 2006, we found four overriding reasons for mobility within the global labour market. These are: to be with family/loved ones; to work in specific countries or economic regions; to have an international career; to work for a specific international organisation[4]. Figure 1.3 outlines these four reasons and highlights the differences between the G20, BRIC and PI(I)GS countries.

Figure 1.3 Main reasons to go abroad for the global workforce, G20, BRIC and PI(I)GS countries in 2011
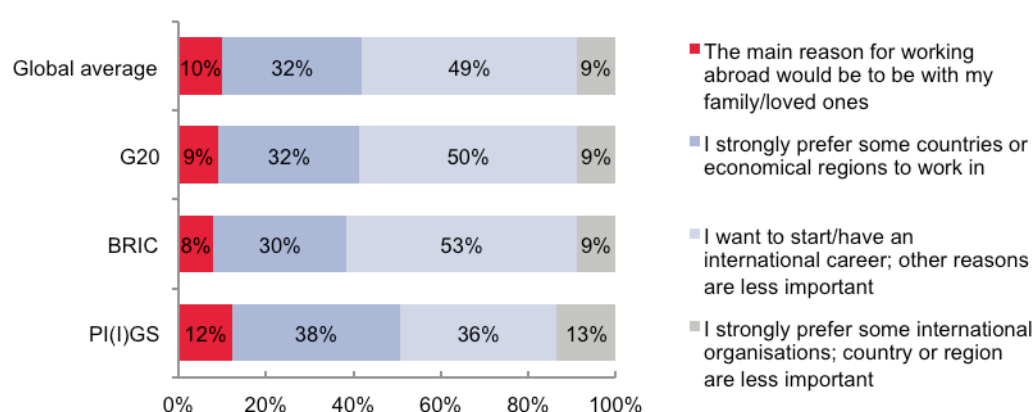
On a global scale, there are no significant differences between men and women when it comes to reasons to work abroad. There is, however, a relationship between the age of a person and their decision to work abroad.

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[4] Post, M. (2006). *Should I stay or should I go?* Tilburg: Tilburg University.

The older someone is, the bigger the influence of certain economical regions has on their decision to move internationally.

International workers opt for a fixed contract

Most people looking to work abroad prefer a fixed contract. This is shown in figure 1.4 indicating the preferences for five types of contract for the G20, BRIC and PI(I)GS countries. The shorter the period of time people wanted to work abroad for, the more prominent a flexible or temporary contract became for them. However, the situation for the PI(I)GS and BRIC countries is somewhat different.

People in PI(I)GS countries pretty much accept whatever contract there is available, with most of them preferring a fixed-term contract or temporary contract for 12 months or longer. This comes down to a need for certainty when moving abroad, probably a reaction to the economic climate in their own country. Contrary to this, people living in one of the BRIC countries rarely accept a temporary contract covering 12 months or less.

Figure 1.4 Type of contract to accept for the global workforce, G20, BRIC and PI(I)GS countries in 2011
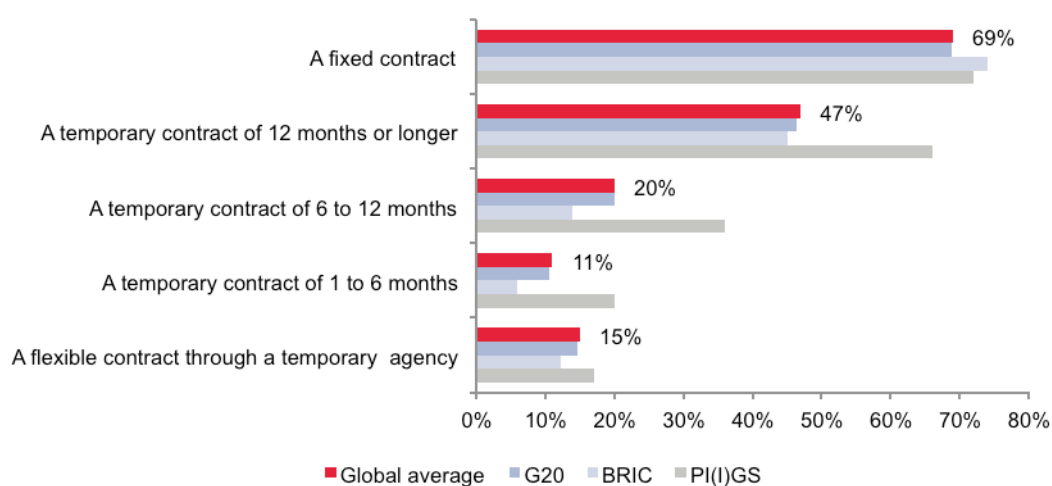
Chapter 2: International recruitment strategies

Recruiting on a global scale requires an awareness of global labour force dynamics. There are two main strategies to ensure successful international recruitment: the 'work to people' strategy and the 'people to work' strategy. Both have their own characteristics and can be highly effective.

Work to people strategy

The 'work to people' strategy concerns moving part or all of your business to another country and then attracting local workers. There are several reasons for adopting this strategy:

- *International branding.* This applies when you want to move a business to a foreign country in order to strengthen its international reputation. It also concerns the opening up of new markets abroad.
- *Growth (potential).* If you have the potential to grow, the 'work to people' strategy can be adopted while expanding in a foreign country. There is often a strong drive to settle abroad.
- *Obtaining (scarce) skills.* If the skills supply is not available in the country of origin[5] it is sometimes easier to move the business to another country instead of attracting talented workers to your home country.
- *Talent shortage.* You, as an employer, are keeping track of the talent you need and actively seek them out in countries where the talent is more common.
- *Cost reduction.* This applies when moving internationally is the most cost effective course of action and local workers in another country will do the same work for less.

People to work strategy

The 'people to work' strategy involves attracting foreign workers from abroad to come to you. An important element of this strategy is the extent to which potential candidates are internationally mobile. This strategy can be beneficial for the following reasons:

- *International profile.* If you want to strengthen your international position, it is important to know the willingness of workers to come to your home country for a set period of time.
- *Growth (potential).* If the supply of workers on the local labour market cannot meet the demands of a growing business, scoping opportunities abroad is often the only option.

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[5] This can refer to a 'skills mismatch' indicating the difficulty of employers to find the right employees in their own country.

- *Obtaining (scarce) skills.* Skills mismatches meaning an employer needs to look internationally for solutions.
- *Talent shortage.* If the pool of local talented workers is not large enough, it is necessary to find out where the talent is.
- *Cost reduction.* If it is about cost reduction, attracting foreign workers can be a successful way to fill in vacancies if they are less demanding than native workers.

Considerations as to which strategy to adopt ultimately comes down to:

Number of people needed

If an employer only needs to recruit a small number of employees then attracting them to their own country of origin is the easier option. As soon as the demand for foreign workers grows, moving part or all of the businesses internationally is the less expensive or more efficient option. When an employer thinks they can be successful abroad by opening up new markets, relocating a business is worth considering.

Duration of contract

If the demand for foreign workers covers a short period of time, it is better to attract talented workers from abroad temporarily. However, companies can also move part of the business to a temporary location in a talent corridor[6] and target supply countries in the same region. When the need for foreign workers stretches over a longer period of time, an employer has to consider whether moving to another country is a more viable option.

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[6] A talent corridor is a region covering two or more countries and offers an employer or company many opportunities to successfully recruit talented workers.

Chapter 3: The 'work to people' strategy in practice

Recruiting people in their own labour market requires an overview of local job recruitment options. Relocating to another country also requires knowledge of what drives the local workforce to look for a new job. This chapter will explain the 'work to people' strategy in more depth. A case is described to give a better idea of how you can make use of the strategy for your own international needs. Box 1 below explains the aspects used to characterise the national labour force.

Box 1 Aspects used to characterise the national labour force in a country

Demographic profile	All kinds of demographic aspects like age, gender, work experience, educational level and educational background
Occupational area	Characterising the national labour force in another country by the current occupational area (also available on a very specific level)
Labour market activity	Indicating whether people are actively looking for a new job, only keeping track of upcoming jobs or are not looking at all for a new job
Most popular industries	Top 5 or top 10 favourite industries to work in
Motivating factors	Most important aspects to take into account when motivating people to work for you
(National) job sources	Commonly used job sources
(National) job titles	In-depth information about the specific jobs websites, search engines and online communities

3.1 Where can you find your talent?

Knowing where to find the right talent for your company is a good starting point. Chart 3.1 below indicates the places where you can find people with specific occupational backgrounds.

Chart 3.1 Distribution of talent in the world according to occupational area in 2011

Europe
1. Manufacturing, Building and Manual work
2. Administrative support & Secretarial
3. Transport & Logistics

North America
1. Health & Medicine
2. Education & Training
3. Administrative support & Secretarial

South America
1. Finance Administration & Auditing
2. General Management
3. Health & Medicine

Africa
1. Engineering & Technology
2. Finance Administration & Auditing
3. Manufacturing, Building and Manual work

Russia
1. IT/ICT/Automation
2. Manufacturing, Building and Manual work
3. Finance Administration & Auditing

Asia
1. Sales
2. Engineering & Technology
3. Banking, Finance Services & Insurance

Middle East
1. Engineering & Technology
2. General Management
3. Accommodation, Catering & Tourism

Australia
1. Transport & Logistics
2. Accommodation, Catering & Tourism
3. Manufacturing, Building and Manual work

From financials in the Middle-East to health care professionals in North America

Chart 3.1 indicates that talented workers are spread across the world, with each continent having an above-average representation of people in specific occupational areas. Europe, for example, houses an above-average share of people working in manufacturing, transport & logistics, administrative support, IT or research & development. In North America employers can find talented workers in health & medicine, education & training, administrative support or marketing. In South America one can find people in finance, health & medicine, transport & logistics or general management.

The labour force of Asia is characterised by people working in sales, engineering & technology, banking, IT, human resources or general management. Russia houses people employed in IT, manufacturing, marketing or finance. In the Pacific region, like Australia, people working in accommodation, transport & logistics or manufacturing are above-averagely represented. The largest share of financial workers can be found in the Middle East. Here, people working in banking, general management or finance can be found. On the African continent, we observe an above average representation of people employed in either banking or manufacturing.

3.2 What drives people in their own local labour market?

Figure 3.1 shows the motivating factors for the BRIC and G20 countries alongside the global average. We can see that in G20 countries, a good salary is the most important reason for finding a new job, followed by good career opportunities. Results for the national workforce of the BRIC countries, however, indicate that good career opportunities are most important, followed by a good salary, a good working atmosphere and good employment benefits. People in the BRIC countries add less value to a permanent contract than people in the G20 countries, but more value to a fit with their personal lives.

The results show that the national workforce of BRIC countries wish to work in an inspiring environment offering plenty of career opportunities and employment benefits.

Figure 3.1 Motivating factors for the national workforce of the BRIC and G20 countries compared to the global average in 2011

Workers in PI(I)GS countries (see figure 3.2) prefer a good working atmosphere when looking for a new job. They also desire permanent contracts and jobs with responsibility, especially compared to the global

average. This indicates that the national workforce of the PI(I)GS countries is looking for stability, probably because of an instability of the economic situation in their own country.

Figure 3.2 Motivating factors for the national workforce of the PI(I)GS countries compared to the global average in 2011

Motivating factor	Global average	PIIGS
Good salary	56%	
Good career opportunities	54%	
Good working atmosphere	43%	
Good terms of employment/benefits	39%	
Challenge of the job	31%	
Good education/training facilities	25%	
Good company reputation	24%	
Permanent Contract	24%	
Responsibility	20%	
International orientation of the company	19%	
Fit with personal ideals	18%	
Flexible working hours	15%	
Variation in work	12%	
Skilled managers	11%	
Acceptable workload	9%	
Appealing products and services	8%	
Acceptable travelling time	8%	
Amount of leave days	4%	
Possibility to work part time	4%	

3.3 What sources do people use in their local labour market?

Knowing where to find workers in their own labour market means having a good idea of the main sources used by them when looking for a job. Figures 3.3 and 3.4 show the sources used by the national workforce of the G20, BRIC and PI(I)GS countries compared to the global stats. (National) jobs websites are by far the most commonly used source when looking for a new job, followed by the company website and search engines like Google, Yahoo and so on. Company presentations/open days, in-store advertising and schools are hardly used when searching for a new job.

Figure 3.3 Job sources used by the national workforce of the BRIC and G20 countries compared to the global average in 2011
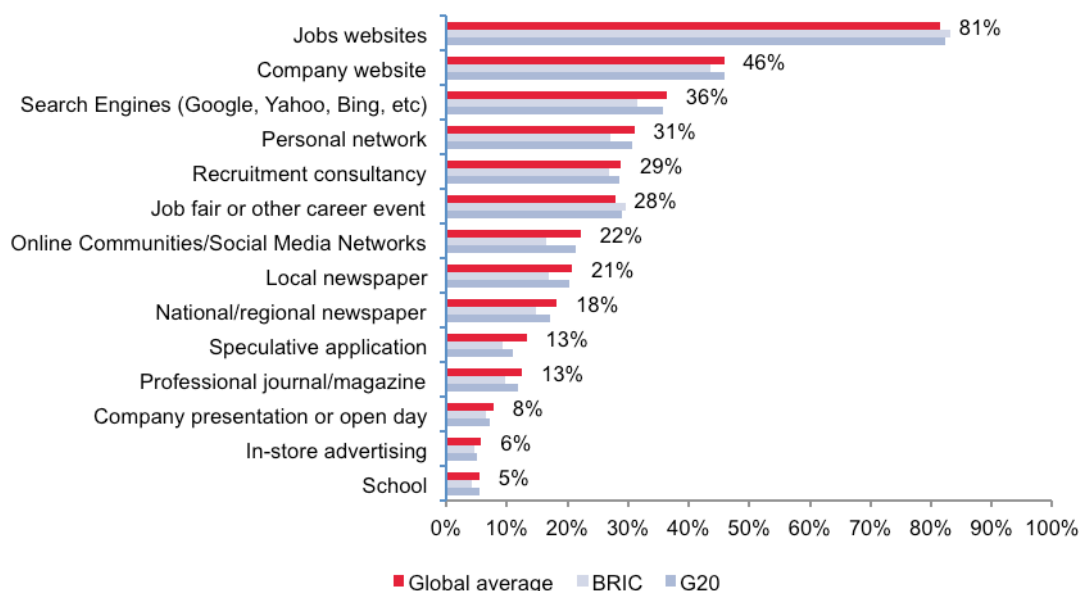
Figure 3.4 shows that more than anywhere else, the national workforce belonging to PI(I)GS countries uses all kind of recruitment sources when keeping track of jobs. People of the PI(I)GS countries make use of jobs websites, search engines and speculative application. This indicates their need to find a job, no matter how much effort is needed. Of all the regions mapped out in figures 3.3 and 3.4, the national workforce of the BRIC countries uses the fewest recruitment sources.

Figure 3.4 Job sources used by the national workforce of the PI(I)GS countries compared to the global average in 2011
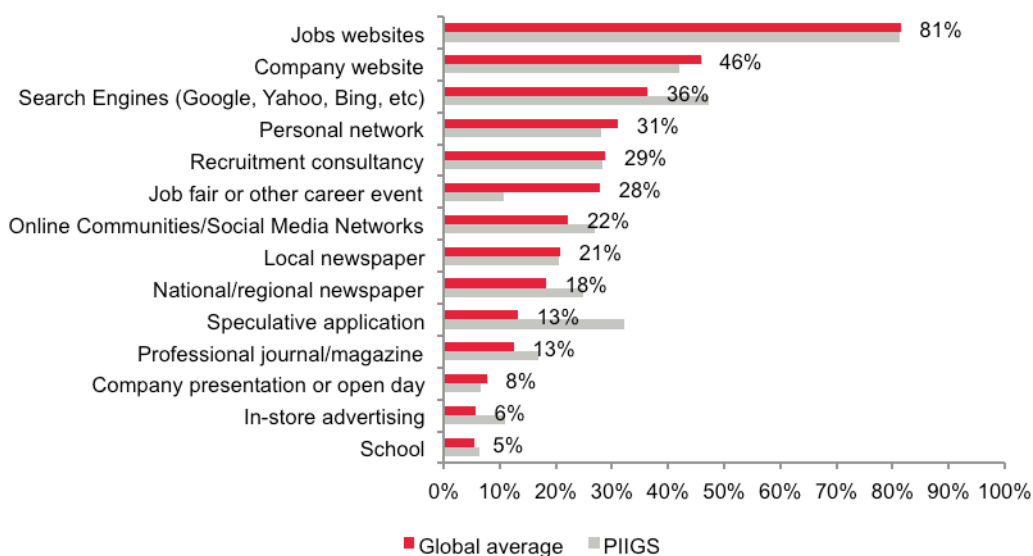
3.4 Case study: new businesses in advanced MRI-systems

A company specialising in advanced health care systems wants to expand its business activities. It has successfully been doing business for years in the Netherlands and wants to grow. A pilot study has revealed that engineers mainly live in China, India, Indonesia, Brazil and Germany (chart 3.1). The manager decides that setting up his new business in Germany will benefit him the most and relocation costs are relatively low. He expects to recruit 100 local engineers for a period of two years or more to meet his recruitment needs. His main reason for international recruitment is to realise his growth potential in new MRI-systems.

Before he starts fine-tuning his recruitment strategy, he wants to see exactly what his target group looks like. Using the Global Talent Barometer, he sees that there are 5,4 million engineers living in Germany with a lot of experience. They are also willing to move within their own country for work. German engineers are, however, more demanding than engineers worldwide: a German engineer chooses on average 4.7 factors to be important in a job compared to 4.1 for engineers worldwide. They also use more different kind of sources: 4.1 per person compared to 3.4 for an engineer living elsewhere on the world. So, when actively looking for a new job, German engineers put a lot more effort into actually getting one. Figures 3.5 and 3.6 below show the main motivating factors for engineers and the main job sources used.

Figure 3.5 Motivating factors of German engineers compared to engineers worldwide, 2011
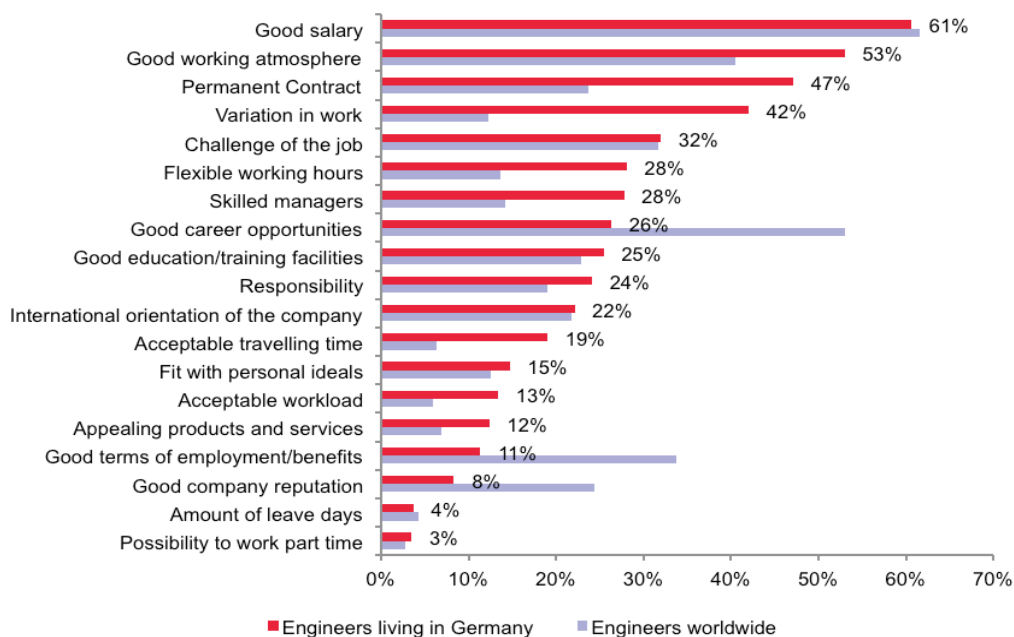
Figure 3.5 indicates that German engineers attach value to a 'good salary'. Furthermore, they rate 'a good working atmosphere', 'permanent contract', 'variation in work', 'flexible working hours', 'skilled managers', 'an acceptable travelling time' and 'an acceptable workload' as more important in their decision to accept a job than engineers worldwide. On the other hand, aspects like 'good career opportunities', 'good terms of employment' and 'good company reputation' aren't as important for them as for engineers worldwide. Therefore, a successful acquisition strategy in this case would mean a focus on the environment that people will be working in, the salary paid to them, the kind of work they have to do, the contract offered to them and the way the relationship between workers and their managers is organised. Because engineers are willing to move from within their own country, recruiters must be able to provide accommodation or other local facilities so travel time is short. The target group will, in other words, influence the Employer Value Proposition[7] making good knowledge of the target market a necessity in order to hire effectively.

Figure 3.6 Job sources used by German engineers compared to engineers worldwide, 2011

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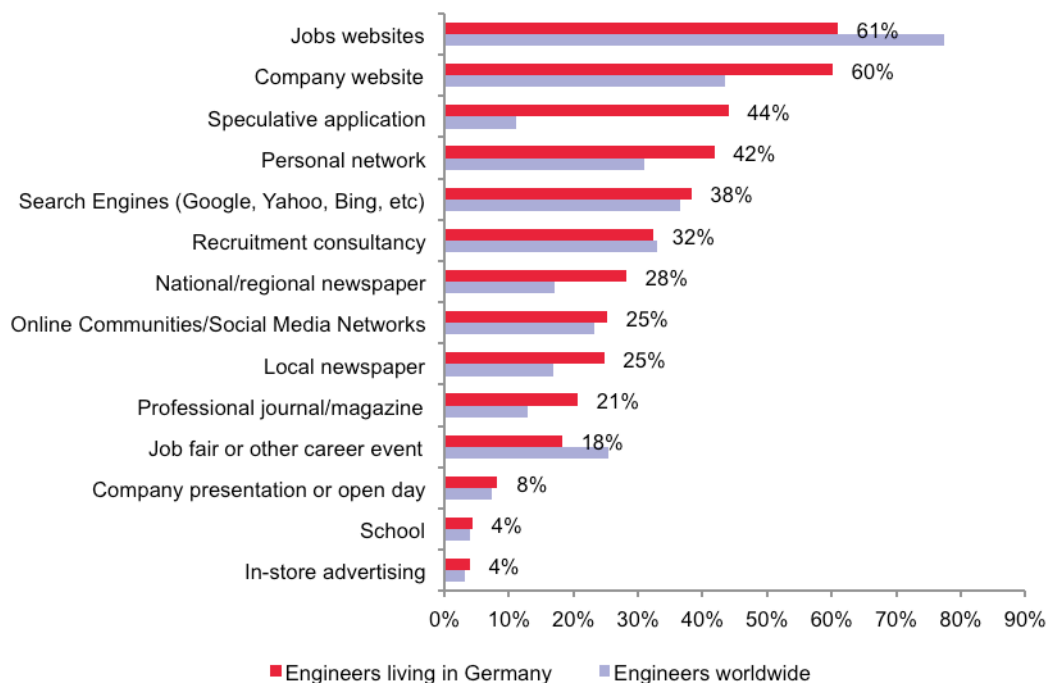
[7] More information about Employer Branding and Employer Value Propositions can be found at the end of chapter 4.

A successful recruitment plan

The bar chart of figure 3.6 shows the extent to which German engineers use different sources to find a new job. What is striking is the above-average use of a speculative application, the company website, personal network as well as of more 'traditional' sources like national/local newspapers and the professional journals/magazines. German engineers attach more value to these sources than engineers worldwide.

Practically, the following steps would therefore need to be included in the recruitment plan:

1. *Develop a strong Employer Brand.* Positioning yourself on the local labour market is very important in order to attract talented workers. Stress the distinctive features of the company as an employer in order to attract the right people in the 'war for talent', in this case engineers.
2. *Set up a corporate website in the German language.* The corporate website must draw attention to the recruitment of 100 German engineers, including testimonials of other engineers who have worked for the company. It is important to focus on employment benefits like salary, types of contract, and working hours.
3. *Find a German partner with connections to German engineers.* A local partner can help you to attract the first wave of engineers successfully.
4. *Elaborate on your recruitment campaign by using jobs websites.* Using renowned jobs websites in Germany can be very helpful to reach the German engineers. A good example is Stepstone.de.[8]

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[8] A more detailed description of the jobs websites, search engines and online communities is possible.

Chapter 4: The 'people to work' strategy in practice

Many employers adopt the 'people to work' strategy when trying to entice potential employees from other countries. This strategy takes into account the fact that people looking for work abroad focus on different factors to those concentrating on domestic job searches. The 'people to work' route involves knowing exactly where you would like to recruit from, how eager people from that region are to move, what motivates them to start working for you and which countries and cities are the most popular for them to relocate to.

This chapter explains the 'people to work' strategy in more detail by describing the international workforce of the G20, BRIC and PI(I)GS countries and comparing these results to the global average. We will then show how this approach can be used in real-life settings.

Box 2 gives an overview of the factors used to categorise the international workforce, giving you a basis for forming a strategy to attract employees from another country.

Box 2 Factors cited by people willing to move to another country for a new job

Demographic profile	Includes things like age, gender, work experience, educational level and background
Occupational profile	Characterises the people who may come to your country by their current occupation (also available on a very specific level)
Main countries of origin	Indicates the countries of origin your target group is coming from
Willingness to work abroad	Gives an indication of the percentage of people willing to move out of their own country to come to you
Duration of staying abroad	The length of time people want to work outside their own country
Preferred destination countries	The countries your target group would consider when looking for a job abroad. The countries mentioned could be seen as your competitors on the international labour market
Preferred cities	An overview of the most popular cities to consider when thinking about working abroad
Main reasons to work abroad	The main reasons to move to a certain country. This is what people expect from an international employer
Most important aspects to choose a company abroad	Important aspects a company needs to take into consideration as an employer
Information needed to work abroad	The most essential information needed from the employer
International job sources	The most common used job sources while looking for a job in another country

4.1 How eager are people to work abroad and in what direction will they move?

People's willingness to work abroad varies widely from continent to continent, with favourite destinations emerging within each country polled. Chart 4.1 demonstrates the international jobseeking behaviour of people in different regions of the world and shows that people living in Australia are most willing to work abroad, with 87 percent expressing a desire to move continent. Jobseekers in Africa aren't far behind, with 86 percent stating that they would like to move abroad. This is sharply contrasted by the number of people in North America looking to move, with only 52 percent searching for work abroad. South America fares only slightly better, with 57 percent looking for an international move, while Europe, Asia and Russia post figures of 71, 68 and 61 percent respectively. Interestingly, while North Americans are the least likely to move abroad, they are the most willing to move within their own country for a new job.

Chart 4.1 Willingness of people to work abroad in different regions of the world in 2011
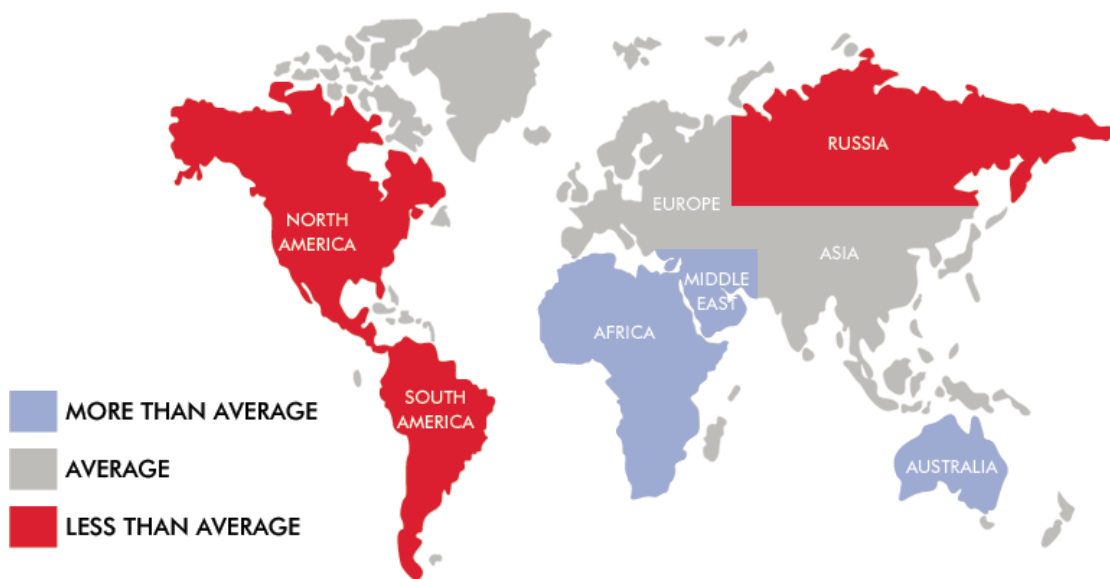
Where people from each continent want to move to is interesting as well. People in Europe opt for their own continent, with the UK, Switzerland and Germany proving the most popular destinations. For European jobseekers, the USA and Canada are the most popular international destinations. In North America, people express a preference for countries like the UK, Australia and Italy, while South Americans opt for the USA, followed by Spain and Portugal, whose languages are spoken widely throughout the region. Jobseekers in the Middle East actually prefer to search for jobs in their own region, with the UAE and Qatar proving most popular, although

the USA, UK and Canada are also of interest. People in Africa, meanwhile, look to North America and Europe, with the USA and Canada topping the poll.

4.2 Why do people look for a new job outside their own country?

Moving to another country for work is not a decision jobseekers take lightly, with many looking at long-term migration rather than a short-term move. As you can see in figure 4.1, jobseekers from the BRIC countries look for a good career, with phrases like 'better career opportunities', 'challenging oneself' and 'acquiring work experience' cropping up. One of the least important factors here is 'a bad economic situation in my own country'.

For all regions, the 'opportunity to broaden experience' ranks highest, while 'better climate', 'partner already works abroad' and 'already have family abroad' are the least important factors for international jobseekers.

Figure 4.1 Reasons to work abroad for the BRIC and G20 countries compared to the global average in 2011
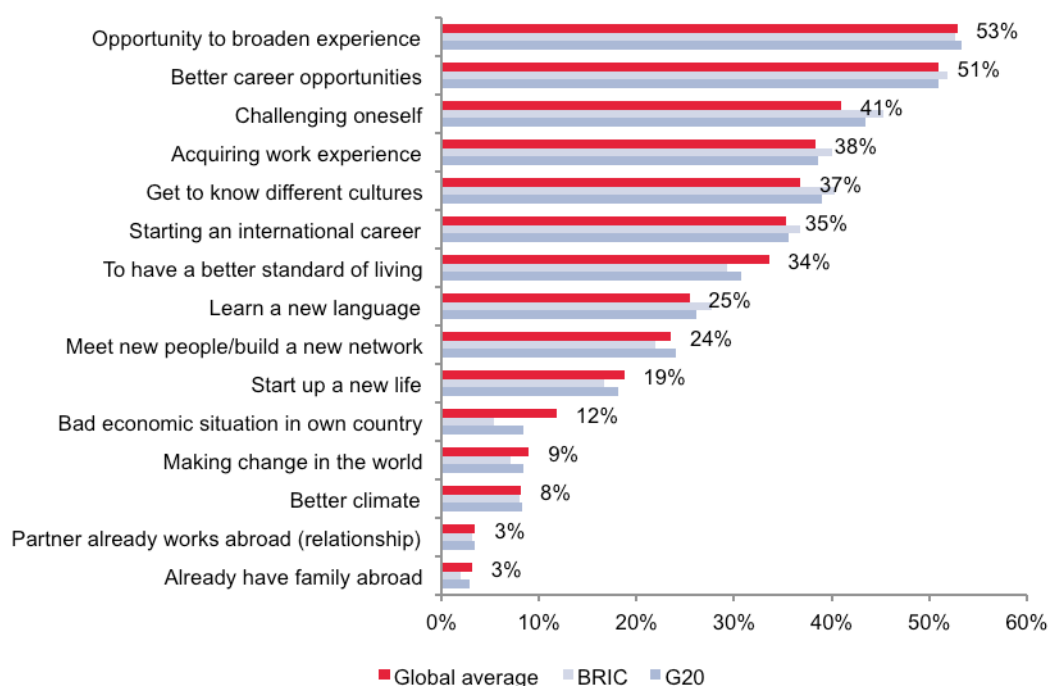

Figure 4.2 shows how the results change when the PI(I)GS countries are added to the mix. Unsurprisingly, jobseekers from Portugal, Ireland, Italy, Greece and Spain cite 'a bad economic situation in own country' as the principle reason to look abroad. What shines through more than anything else is that, while people in PI(I)GS countries are the least inclined to work abroad, those who do express a desire to move are very clear about their

motivations. Additionally, the destination countries for people from this region are all perceived to be at the forefront of the economic recovery in the next year (see table 4.2).

Figure 4.2 Reasons to work abroad for the PI(I)GS countries compared to the global average in 2011

4.3 What is the search behaviour of international jobseekers?

International jobseekers in the G20 and BRIC countries behave only slightly differently to the global average. International jobs websites are by far the most commonly used job resource, while search engines are the second most popular in G20 countries – jobseekers in BRIC countries prefer to use corporate websites as their second choice. Foreign recruitment agencies are used more often in BRIC than in G20 countries. While online communities and social media have increased in popularity globally, these have actually declined in use within BRIC countries.

Figure 4.3 shows that more traditional print sources like newspapers and magazines are now extremely unimportant to people in both G20 and BRIC countries, hammering home the popularity of online sources for jobseekers.

Figure 4.3 Job sources used by the international workforce of the BRIC and G20 countries compared to the global average in 2011

Overall, jobseekers in PI(I)GS countries use more sources to find a job than their counterparts in BRIC and G20 countries: with each person using on average 3.2 sources compared to 2.9 and 3.0 in the other regions. Although international jobs sites are the most popular source, jobseekers in PI(I)GS countries make more use of search engines, national jobs sites, people they know and online communities than the global average (see figure 4.4). While newspapers and magazines are vital when looking for national jobs, these are the least important sources when it comes to international job searches.

Figure 4.4 Job sources used by the international workforce of the PI(I)GS countries compared to the global average in 2011
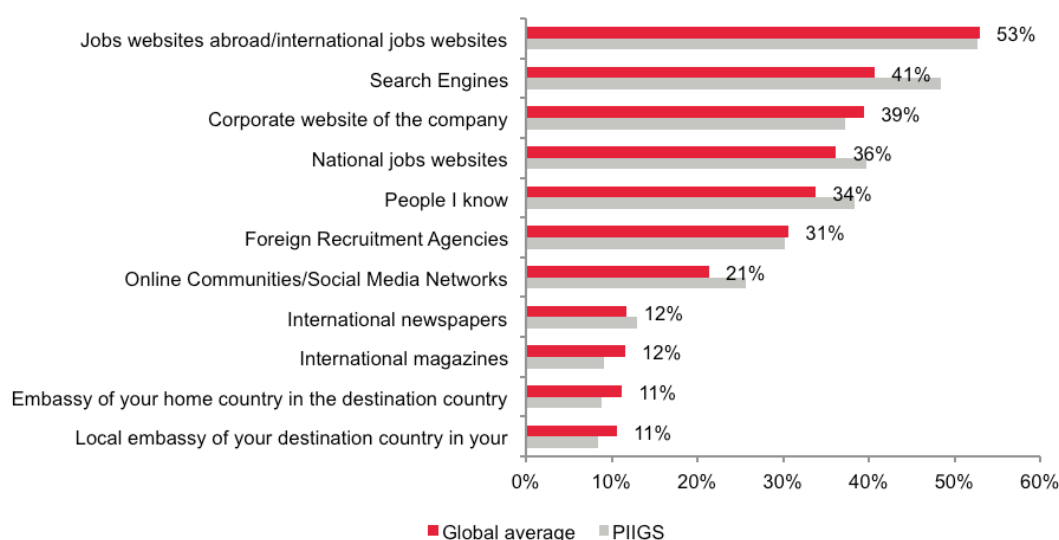
4.4 What information do people need to choose an employer abroad?

Knowing what information you need to offer international workers is vital if you want to attract them from their own country. Remember that someone moving abroad for work faces a range of new situations: from new surroundings to new people and new customs. If you can provide jobseekers with information to help people feel at ease beforehand, then you instantly have an advantage over other companies. But what information do jobseekers want to receive? Advice on accommodation comes out on top, followed by standard of living and general information on the social environment of your country. Opportunities to learn a language, local facilities and transport links are also relevant to people. Jobseekers from BRIC countries, however, are less interested in relocation arrangements.

Figure 4.5 Information needed for the international workforce of the BRIC and G20 countries compared to the global average in 2011
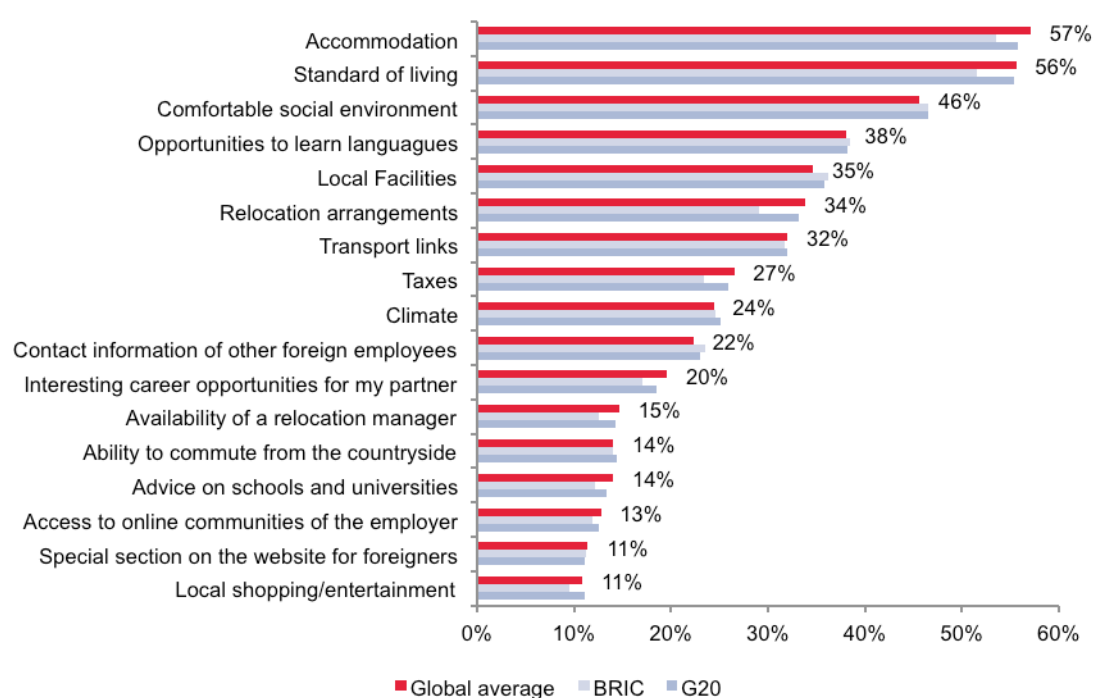
As can be seen in figure 4.6, jobseekers in PI(I)GS look for very different information. There, people want to know about the standard of living, opportunities to learn foreign languages and career opportunities for their partner. Less important is information on general local facilities, relocation arrangements and the possibilities to commute from the countryside.

Figure 4.6 Information needed for the international workforce of the PI(I)GS countries compared to the global average in 2011

Worldwide, employer brand is vital to jobseekers. Companies who can incorporate the preferences of their target candidate will prove far more enticing to jobseekers, and are much more likely to persuade them to make the move.

4.5 Making the most of the global popularity of your location and your brand

How much effort you need to make to attract foreign workers depends on how popular your location is among your target group. Additionally, the popularity of your company within your target group will have a massive impact. For the first time, we asked people which employers they favour when deciding where to go. The global results are shown in table 4.1.

Table 4.1 Top 10 preferred countries, cities and employers on a global scale

Ranking	Country	City	Employer
1	USA	London	Google
2	United Kingdom	New York	Microsoft
3	Canada	Singapore	IBM
4	Australia	Paris	Apple Inc.
5	Germany	Sydney	Coca-Cola
6	Switzerland	Dubai	GE
7	Singapore	Toronto	Siemens
8	France	Berlin	Nestle
9	Italy	Melbourne	P&G
10	Sweden	Los Angeles	Unilever

While the USA, UK and Canada retain the top 3 positions, it is worth noting that Singapore and Sweden are now in the top 10, moving from 11th and 13th respectively in the 2009 report. At the same time, Spain has now dropped out of the top 10 to 12th position. The most popular cities all tend to be in popular countries, with London, New York, Sydney, Toronto and Berlin the top 5. Similarly, most of the preferred companies match up to popular countries, with US company Google by far the most popular company. Having said that, Unilever, a Dutch company, sits in 10th position.

Table 4.2 Top 5 economies that will lead the economic recovery for the next 12 months

Ranking	Countries
1	China
2	USA
3	India
4	Germany
5	United Kingdom

According to the global labour market population, China will lead the economic recovery in the next 12 months. The similarity of this table to the results in table 1.2 is significant, especially for people in PI(I)GS countries: their three most favoured destinations are all reflected in the top 5 most powerful economies that will lead the economic recovery.

4.6 Case study: Manage growth by recruiting abroad

The CEO of a successful English company called 'IT for you' has a huge problem: she can't find the right talent locally to open up new markets in the UK and to compete with local firms also specialising in IT services. Quite simply, she cannot become a market leader unless she implements reforms quickly. Although there are plenty of IT engineers in the UK, her desire to build her company quickly using advanced technological systems means that she simply couldn't do it with just UK workers. Looking for scarce skills from around the world, she uses the 'people to work' strategy. Before she begins recruiting internationally, she needs to answer the following questions:

- How many IT workers are willing to move to the UK for a new job?
- Why are IT specialists willing to move to the UK?
- What are the most important reasons for choosing a company in the UK?
- Where can I find the talent?
- How can IT specialists be reached?

How many IT workers are willing to move to the UK for a new job?

Around 70 million out of 134 million IT workers in the world have an interest in working in the UK. About a third has five to ten years' work experience, while nearly a quarter has 10 years' or more. They are mainly educated men (60% of them have a Bachelors degree, while 34% have a Masters degree). Around 59 percent of these people are actively looking for a new job.

Why are IT specialists willing to move to the United Kingdom?

Figure 4.7 shows that most IT workers want to move to the UK for 'better career opportunities', followed by 'opportunity to broaden experience', 'starting an international career' and 'acquiring work experience'. 'IT for you' needs to take these factors very seriously to be considered as a potential employer.

Figure 4.7 Reasons to work abroad for IT workers willing to go to the UK compared to IT workers worldwide, 2011

Better career opportunities	63%
Opportunity to broaden experience	60%
Starting an international career	44%
Acquiring work experience	43%
To have a better standard of living	39%
Get to know different cultures	33%
Challenging oneself	32%
Meet new people/build a new network	27%
Learn a new language	19%
Start up a new life	18%
Making change in the world	11%
Bad economic situation in own country	10%
Better climate	9%
Already have family abroad	2%
Partner already works abroad (relationship)	2%

■ IT workers interested in the UK ■ IT workers worldwide

What are the most important reasons for choosing a company in the United Kingdom?

Reasons for wanting to work abroad are not the only factors that 'IT for you' should consider. They should also look into why IT workers are looking for a company abroad. Figure 4.8 shows that IT workers looking to move to the UK are interested in 'good salary', 'good career opportunities', 'good working atmosphere' and 'good terms of employment/benefits'. Also, a 'challenging job' is the sixth most important reason to choose an employer abroad, while it is one of the main reasons for IT workers to accept a job offer in the UK. 'IT for you' must think carefully as to whether they can deliver the requirements asked for by potential employees. If they can, then these must be clearly emphasised on the vacancy.

Figure 4.8 Reasons to choose a company abroad for IT workers willing to go to the UK compared to IT workers worldwide, 2011

Where can I find the talent?

Table 4.3 below shows the main countries that IT workers interested in the UK are based in. By far the majority can be found in India, followed by China and Russia. IT workers interested in the UK can also be found in Indonesia, the USA and Germany. But recruitment activities should focus primarily on India and China, followed by Russia given the number of potential candidates in these countries.

Table 4.3 Main countries of origin of IT workers interested in working in the United Kingdom

Ranking	Country of origin
1	India
2	China
3	Russia
4	Indonesia
5	USA

How can IT specialists be reached?

To succeed, 'IT for you' needs to know the channels IT candidates use to look for a job in that country. Figure 4.9 shows the most commonly used channels, demonstrating that international jobs websites are by far the most important, followed by search engines and corporate websites. Compared to IT workers globally, those looking for work in the UK use slightly more sources to search for a job: 3.4 sources compared to 3.2 per person.

Figure 4.9 Job sources used by IT workers willing to go to the UK compared to IT workers worldwide, 2011
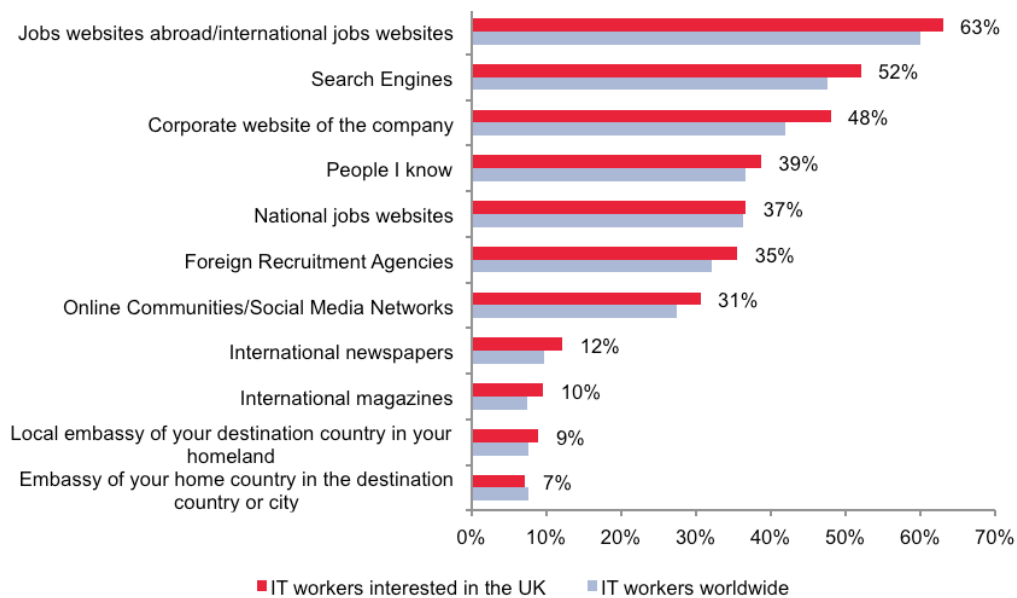
Because of this, 'IT for you' should use the following methods in their recruitment strategy:

1. Post vacancies on jobs websites, including those in India, China and even Russia
2. Give a clear description of the vacancy on the 'IT for you' corporate website (with maybe even a special section on the website for foreigners)
3. Offer vacancies to foreign recruitment agencies so that they can post it on their own website
4. Use their own network to promote vacancies so they can be found on the international labour market by international jobseekers

Additionally, 'IT for you' should promote the vacancies on social media networks or through advertisements in international newspapers (eg the International Herald Tribune). The UK embassy in India, China and Russia could also be informed that 'IT for you' is looking to attract local IT specialists to the UK.

The need for a strong employer brand

For both national companies and global market players, a strong employer brand is vital. This brand must incorporate and reflect the core values of the organisation and is ideally tailored to the preferences of the target groups. This should create a positive and unique position as an employer in the mindset of your potential audience and employees, and should be carried through the entire company.

Definition of core concepts:

Employer brand: The way an organisation is perceived as an employer, preferably by its own target groups.

Employer branding: Obtaining and retaining a positive, preferably unique and authentic position as an employer with respect to the recent (external) and future labour force as well as its influencers. The aim of employer branding is attracting and retaining the best talent there is for your company.

Employer value proposition: The whole entity of an employer consisting of (core) values, characteristics and standards ideally tailored to the motivating factors of the target groups. Employer value propositions are very important for an organisation to acquire a unique and attractive position on the labour market, nationally and even globally.

Chapter 5: Intelligence Group and The Network

Intelligence Group

Intelligence Group is a Dutch research and consultancy agency specialising in recruitment marketing and recruitment. We analyse and solve recruitment problems through innovative research methods. This can range from research reports and consultancy to all-encompassing solutions for recruitment, recruitment marketing and employer branding problems on both a national and international level. Intelligence Group is a trendsetting partner of many employers and recruitment-related companies in the Netherlands and many other countries.

The Network

As an alliance of 49 market leading job boards across more than 125 countries, The Network prides itself on its ability to deliver effective international recruitment campaigns, making them easier to manage and more cost efficient. We provide flexible solutions for your recruitment needs, sharing our knowledge of your target markets and allowing you to book directly with a single and dedicated point of contact speaking your language and understanding your needs.

So regardless of your target candidates or destination country, we can help you to understand the market, post jobs, search CVs and develop and promote your branding. Our partners are leaders in online recruitment – we are the global experts in terms of our reach, understanding and products. The Network gives you access to the biggest recruitment marketplace in the world. Our expertise is your solution.

The Global Talent Mobility Survey

In 2006 Intelligence Group & the Network conducted its first research into the international labour market, completing a survey concerning mobility on the international labour market of people living in eight European countries (Belgium, Denmark, Germany, Italy, Netherlands, Norway, Sweden and United Kingdom). The results were published in The International Recruitment Manual (2006).

In July and August of 2009 a follow-up was produced by Intelligence Group and The Network in over 40 countries, resulting in over 66,000 respondents and the White Paper Get ready for the international Recruitment Rally (2009).

In the summer of 2011, the third wave of the Global Talent Mobility Survey was conducted by Intelligence Group, again in close co-operation with The

Network. The research covers data from 66 countries, has resulted in 162,495 respondents, and gives recruiters and employers from all over the world answers on questions like where they can find talent and how they can attract them for their own country or company.

Our Global Talent Barometer

In order to get easy access to the results of the third wave of the Global Talent Mobility Survey, our Global Talent Barometer has been launched. This easy-to-use tool enables employers and recruiters to find the most important results for their target groups, and allows users to tailor results by country, occupational area, level of education, work experience and even current industry. Having defined a target group, you can see how many candidates fit your criteria thanks to a map showing preferred destinations and more, demonstrating the main reasons that people in your target group have for wanting to move abroad. To find out more, please visit: www.globaltalentbarometer.com

In-depth analysis

Based on our third wave of international research, Intelligence Group are now able to provide you with answers to the following questions:

- Where is my specific target group in the world?
- What drives them to my country and how can I reach them?
- What differs in people's motivation to choose country A or city B or company C?
- With what countries does my country compete globally?
- How many people want to work in a specific country?
- How can we best recruit and attract people from country A?
- How and where to recruit locally in a foreign country on a specific occupational area?
- What unique job board, website and social media do I have to use to attract local talent?
- How attractive is my company globally?
- Who wants to work for my company and where can I find them?

Looking for more information?

For more information about our international research & in-depth analysis, please visit: www.intelligence-group.nl/en.

You can contact our International Account Manager Esther van Aalst at esther@intelligence-group.nl, our International Labour Market Analyst Conny Roobol at conny@intelligence-group.nl, our International Consultant Geert-Jan Waasdorp at geert-jan@intelligence-group.nl or our CEO Ronald

Simons at ronald@intelligence-group.nl. We are more than willing to answer your questions and see what we can do for you.

For more information regarding your recruitment strategy, job postings, access to CV databases or employer branding products from the Network and its partners, please contact:

Our Managing Director Mike Booker at mike.booker@totaljobs.com or our Marketing Manager Andrea Strohmayr at andrea.strohmayr@the-network.com

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Appendix I

Participating countries

Algeria	Canada	France	Italy	Malaysia	Qatar	Switzerland
Australia	China	Germany	Ivory Coast	Morocco	Romania	Tunisia
Austria	Croatia	Ghana	Jordan	Netherlands	Russia	Ukraine
Bahrain	Czech Republic	Greece	Kazakhstan	Nigeria	Saudi Arabia	United Arab Emirates
Belarus	Denmark	Guatemala	Kenya	Norway	Serbia	United Kingdom
Belgium	East Africa	Hungary	Kuwait	Oman	Singapore	USA
Bosnia	Egypt	India	Latvia	Panama	Slovenia	
Brazil	El Salvador	Indonesia	Lebanon	Philippines	South Africa	
Bulgaria	Estonia	Ireland	Lithuania	Poland	Spain	
Cameroon	Finland	Israel	Luxemburg	Portugal	Sweden	

Appendix II

The definition of some of the terms used during this white paper can be found below.

BRIC countries: this term refers to people living in Brazil, Russia, India or China.

G20 countries: this term refers to the 19 countries stated below, including the members of the European Union. Argentina, Japan, Mexico, Turkey and South Korea were not part of Wave 3, which is why we have stated in the introduction that by using the term 'G20' we cover 75 percent of the countries belonging to it.

Argentina	Germany	Japan	United Kingdom
Australia	France	Mexico	United States
Brazil	India	Russia	South Africa
Canada	Indonesia	Saudi Arabia	South Korea
China	Italy	Turkey	European Union

PI(I)GS countries: this term refers to people living in either Portugal, Ireland, Italy, Greece or Spain.

Appendix III

In chart 3.1, we have given an overview of the distribution of different occupational areas around the world. In our questionnaire, we have included many occupational areas some of which could be subdivided into more categories. This means analyses can be done even on this specific level. The overview below includes the 25 main occupational areas.

Accommodation	Education & Training	Human Resources	Marketing & Advertising
R&D, Science and Scientific Research	Administrative support	Engineering & Technology	IT/ICT/Automation
Media & Information	Sales	Banking & Insurance	Finance & Auditing
Land, Sea, Environment	Police, Security & Protective	Social Care	Culture & Fine Arts
General Management	Law	Public Services	Telecommunications
Design & Architecture	Health & Medicine	Manufacturing & Manual Work	Purchasing
Transport & Logistics			

Occupational areas that could be subdivided into more specific categories include:

Engineering & Technology
General Management
Health & Medicine
IT/ICT/Automation
Manufacturing & Manual Work
R&D, Science and Scientific Research