

Migration for Work Survey

Introduction

In the new post-recession normal, finding the right people with the right skills is a challenge for many employers, yet many individuals face unemployment. Demographic shifts, economic turbulence and emerging technologies are presenting new challenges and unprecedented opportunities. Having the right talent in place is more critical for success—human potential itself is becoming the catalyst for change and a global driving force economically, politically and socially. Work and workers are more mobile than ever before, meaning that although talent may be elusive, it's also everywhere. In this new era—one ManpowerGroup has defined as the Human Age—individuals' job hunts and organisations' talent searches can, and will, happen on a more global scale.

To explore individuals' views around relocating for work opportunities and how their opinions may have changed since the onset and decline of the global economic recession, ManpowerGroup surveyed 14,385 employed people across nine countries. Respondents in Canada, China, France, Germany, India, Italy, Japan, the United Kingdom and the United States comprised a mix of workers in both professional and non-professional job roles and were asked about their willingness to relocate, barriers to relocation and geographic relocation preferences. This survey is a follow up to research conducted in 2008 and reveals that the global economic downturn and subsequent slow recovery have had a discernible impact on how individuals view relocation for work.

Although in many ways relocation is easier than ever before due to evolving technology and readily available transportation, our *Migration for Work Survey* reveals that global economic downturn has had a profound impact on peoples' willingness to relocate for work and the barriers prohibiting relocation.

Survey Results

For the *Migration for Work Survey*, ManpowerGroup conducted research among individuals from five countries represented in the 2008 survey—Canada, France, Germany, the United Kingdom and the United States—in addition to four new countries—China, India, Italy and Japan. Examining the results from each country reveals national variances and distinct trends in emerging and established markets.

More than 1 in 4 people report that they are *more* willing to relocate for work since the global recession.

When asked specifically if the global recession has made them more or less willing to relocate for work, 27% of respondents said they were more willing to relocate, indicating that the economic downturn and lingering unemployment woes have put more pressure on individuals to be flexible and broaden their job search parameters (Figure 1). In contrast, 19% of respondents reported they were less willing to relocate, while 54% said their willingness was about the same.

FIGURE 1. SINCE THE GLOBAL RECESSION, ARE YOU MORE OR LESS WILLING TO RELOCATE FOR WORK?

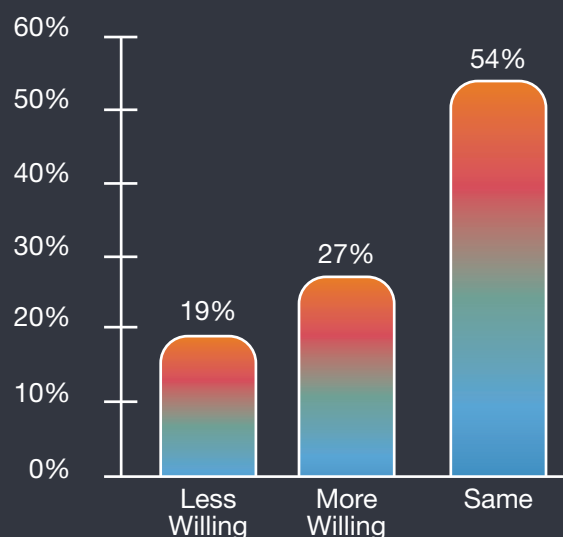
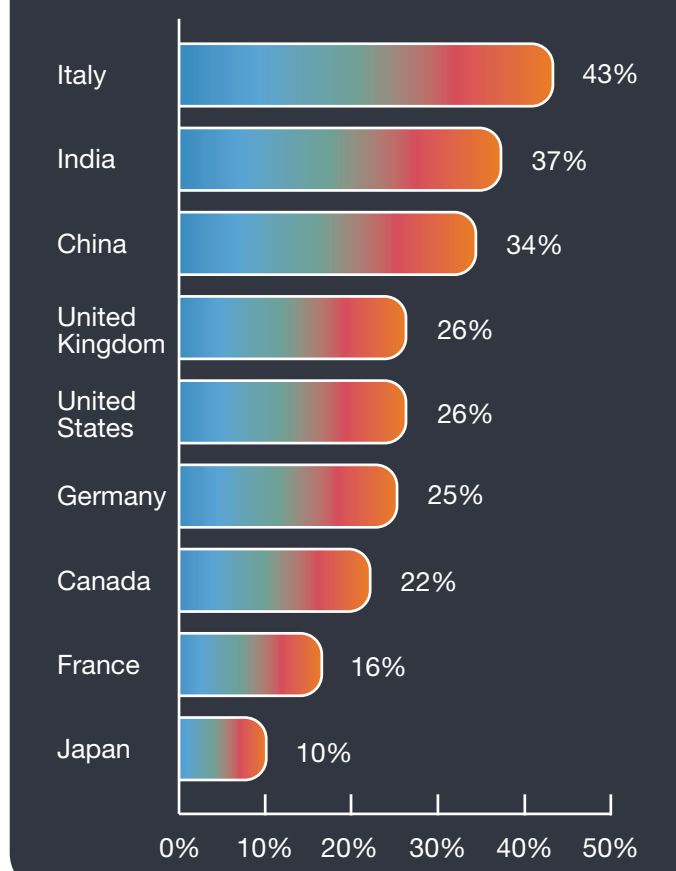


FIGURE 2. PERCENTAGE OF INDIVIDUALS MORE WILLING TO RELOCATE SINCE THE GLOBAL RECESSION

National Variances



An international comparison reveals the global recession has impacted individuals' willingness to relocate to varying degrees (Figure 2). In Italy, where the recession has had significant and lasting effects on the labour market, 43% of respondents said they were more willing to relocate since the recession. At the same time, over a third of respondents in India (37%) and China (34%)—two of the earliest recovering nations—also reported increased willingness to relocate, perhaps reflecting the increased capacity for entrepreneurial risk-taking encountered in emerging markets. Japanese and French workers were least likely to say that the recession had made them more willing to relocate, with only 10% and 16%, respectively, agreeing. Individuals' unwillingness to move for work in these developed markets is perhaps a product of the mature social support systems in place there, where governments do much to provide for unemployed workers.

Nearly 3 out of 5 people are willing to relocate for work.

When asked if they would be willing to consider relocating for a job, and if yes, for how long, 59% of respondents in the nine countries said that they would be willing to relocate, while 41% would not be willing to move (Figure 3). This is a marked contrast to the 2008 survey, when only 22% of respondents would not consider relocating. Of those surveyed, 25% would be willing to relocate permanently (compared to 31% in 2008), while 20% would be willing to relocate for one to three years (compared to 28% in 2008). Fewer respondents would be willing to relocate for a four-to-six or seven-to-nine year period (6% and 2% respectively), while 6% would still be willing to relocate for less than six months. While the proportions of those willing to relocate for different amounts of time has remained somewhat consistent, the percentage of those willing to consider relocation has dropped significantly, possibly reflecting individuals' reduced appetite for risk in uncertain times.

FIGURE 3. WOULD YOU CONSIDER RELOCATING FOR A JOB? IF YES, FOR HOW LONG?

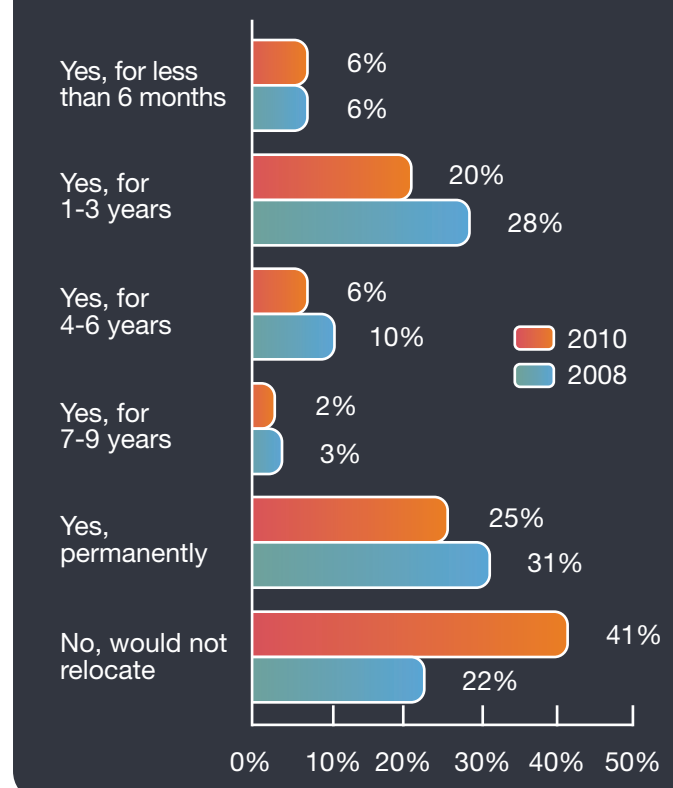
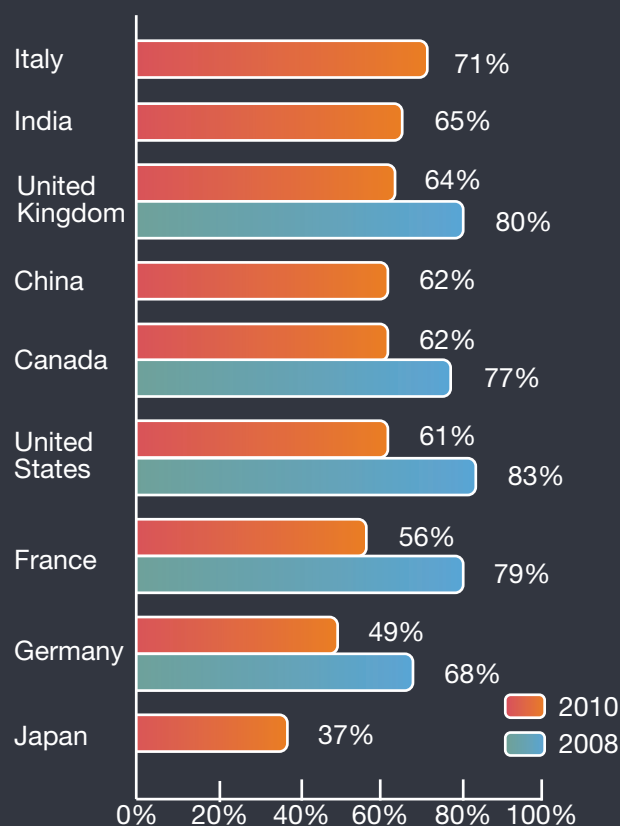


FIGURE 4. WOULD YOU CONSIDER RELOCATING FOR A JOB?

National Variances, % indicating yes

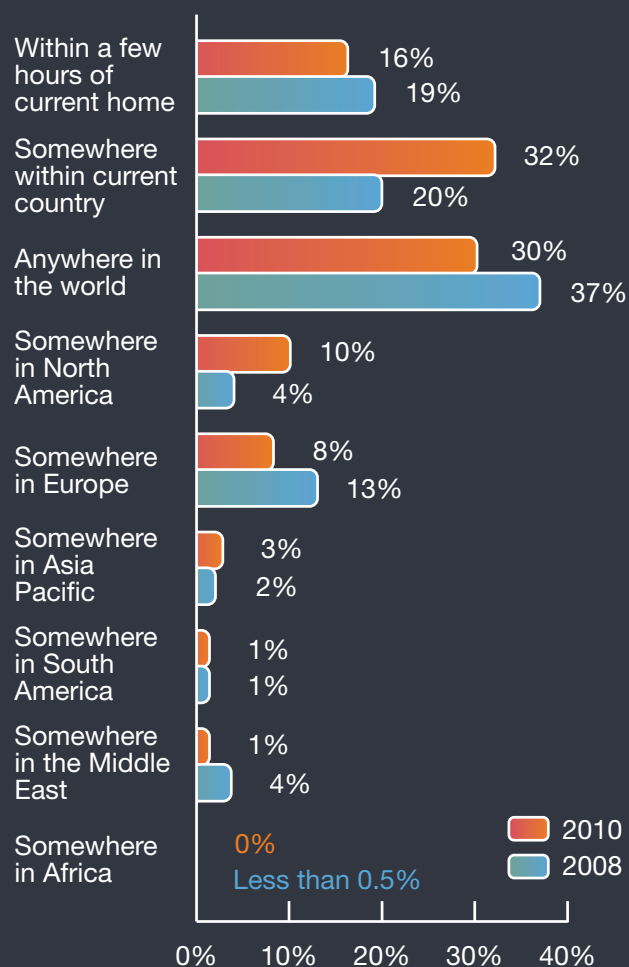


The discrepancy between those saying they are more willing to consider relocation since the start of the economic downturn and those actually willing to relocate becomes clearer when examining the responses by country. When asked if they would be willing to relocate for a job, Italian and Indian employees are most often willing to consider relocation, with 71% and 65%, respectively, considering relocation, while Japanese (37%) and German (49%) employees are least likely to do so (Figure 4). All of the countries surveyed in 2008 had a noticeable decline in the percentage of respondents willing to consider relocation, reflecting perhaps a decreased willingness to take on risk among individuals in these fairly stable, well-developed economies, despite any difficulties created by the downturn. Respondents in the emerging markets of India and China were among the most willing to relocate, and individuals from Italy, where the recession has had a very heavy impact on unemployment, are the most willing to take the risk of relocating for a job.

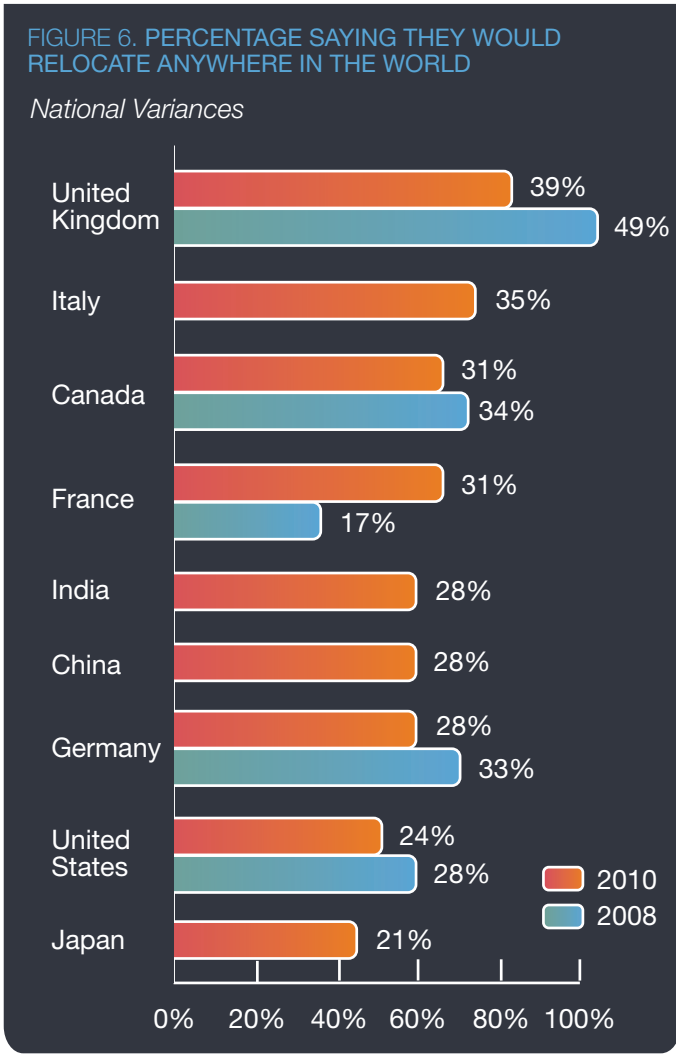
Downturn influences regional preferences for work migration

Among those willing to relocate for a job, the distance and geographical preferences have also changed significantly since 2008. Fewer workers who would consider relocation are willing to move from their home countries and certain areas of the world have become less desirable destinations in the eyes of individuals. Sixteen percent of respondents would only consider moving a few hours from their current home (down from 19% in 2008), and 32% would only consider moves within their own country (up from 20% in 2008) (Figure 5). So while respondents are willing to consider moves of a larger distance, the desire to stay within their home countries, presumably near to familial support systems in these uncertain times, has increased.

FIGURE 5. HOW FAR WOULD YOU RELOCATE FOR A JOB?



Regional preferences have also changed since the start of the global recession. While 30% of respondents are still willing to move anywhere in the world, emerging markets and those most impacted by economic troubles are less popular with prospective workers. North America has become a more desirable destination, favoured by 10% of respondents in 2010, compared to 4% in 2008. At the same time, interest in relocating to Europe has declined from 13% in 2008 to 8%, perhaps reflecting the protracted recovery. Emerging markets in the Asia Pacific, South American, Middle Eastern and African regions attract far less specific interest, with only 3% of respondents interested in relocating to the relatively robust markets in the Asia Pacific region, and no interest in Africa. The Middle East has become an even less popular destination, with only 1% of 2010 respondents willing to relocate to the region, compared to 4% in 2008.



U.K. and Italian respondents are the most flexible regarding location, with 39% and 35% respectively saying they would relocate anywhere in the world (Figure 6). In contrast, Japanese and U.S. employees are least flexible regarding location, with only 21% and 24% of respondents willing to move anywhere.

When asked about which specific countries they would most like to work in, respondents favoured well-developed English-speaking countries above all others, with the United States, Canada, Australia, and the United Kingdom leading individuals' preferences (Figure 7). The United Arab Emirates and Argentina have moved off the list since 2008, while India's robust emerging market and Switzerland's relative economic strength have made them more popular.

FIGURE 7. IF YOU WOULD BE WILLING TO RELOCATE FOR A JOB, WHICH COUNTRIES WOULD YOU PREFER?

2008		2010	
1.	United States	1.	United States
2.	United Kingdom	2.	Canada
3.	Spain	3.	Australia
4.	Canada	4.	United Kingdom
5.	Australia	5.	France
6.	France	6.	Germany
7.	Italy	7.	India
8.	UAE	8.	Italy
9.	Germany	9.	Spain
10.	Argentina	10.	Switzerland

Family ties stronger than economic barriers to relocation; Incentives could encourage individuals to move for work

When asked about barriers to relocation, family ties were the most common reason why workers would not relocate for a job, cited by nearly half of all respondents (48%) (Figure 8). Similarly, 23% reported that being with a partner who was unwilling to move would prevent them from relocating. Aside from relationships preventing relocation, economic factors are also a considerable barrier to moving for work. The cost of relocation was a prohibitive factor for 29% of respondents, while 12% specifically said the inability to sell their current home due to depressed housing markets would prevent relocation. Language barriers would prevent 19% of respondents from relocating.

While economic and language barriers might be considered surmountable—incentives from employers and job training could encourage relocation despite these barriers—the personal ties to home would be more difficult to overcome. Nevertheless, 17% of respondents said that nothing would prevent them from relocating for a job—they’re willing to go where the work is.

Conclusion

The global economic downturn has had a profound effect on individuals’ willingness to relocate for work, but this impact has varied on a country-by-country basis depending on the depth and longevity of the recession. Workers in developed nations that have had a comparatively mild reaction to the downturn are far less willing to relocate for work and more inclined to stay within their own countries, while individuals in countries that experienced longer, deeper downturns are more willing to move. Their counterparts in emerging

FIGURE 8. WHAT WOULD PREVENT YOU FROM RELOCATING FOR A JOB?

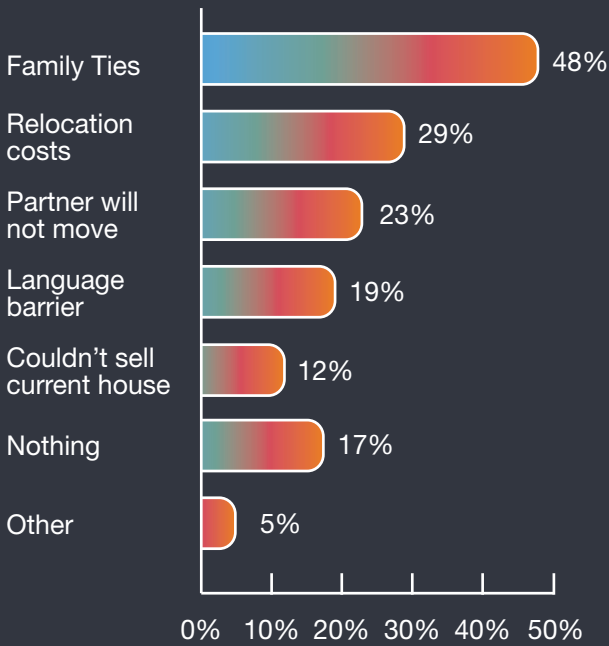


FIGURE 9. WHAT ARE THE BIGGEST BARRIERS TO RELOCATION?
Respondents could choose more than one answer.

National Variances

Country	Barriers to Relocation						
Canada	Family Ties (50%)	Relocation costs (32%)	Partner will not move (25%)	Nothing (16%)	Language barrier (14%)	Other (9%)	Could not sell house (8%)
China	Family Ties (53%)	Relocation costs (52%)	Language barrier (32%)	Partner will not move (20%)	Nothing (10%)	Could not sell house (4%)	Other (1%)
France	Family Ties (49%)	Partner will not move (29%)	Language barrier (21%)	Relocation costs (17%)	Could not sell house (13%)	Other (6%)	
Germany	Family Ties (41%)	Partner will not move (36%)	Language barrier (18%)	Relocation costs (17%)	Could not sell house (16%)	Nothing (15%)	Other (6%)
India	Family Ties (48%)	Nothing (26%)	Relocation costs (23%)	Partner will not move (14%)	Language barrier (10%)	Could not sell house (8%)	Other (6%)
Italy	Family Ties (57%)	Partner will not move (20%)	Relocation costs (18%)	Language barrier (16%)	Could not sell house (6%)	Other (4%)	
Japan	Family Ties (33%)	Nothing (28%)	Language barrier (24%)	Partner will not move (21%)	Could not sell house (15%)	Other (2%)	
United Kingdom	Family Ties (48%)	Relocation costs (32%)	Partner will not move (21%)	Language barrier (16%)	Nothing (16%)	Could not sell house (11%)	Other (6%)
United States	Family Ties (51%)	Relocation costs (39%)	Partner will not move (23%)	Could not sell house (21%)	Language barrier (19%)	Nothing (13%)	Other (6%)

markets, where the attitude towards risk is less reserved, are also more willing to move, even though their respective countries' recoveries have been more robust.

Among those willing to relocate, economically-developed English-speaking countries have become the most popular destinations, perhaps because of the increasingly global nature of the language, especially given that approximately one in five respondents say that a language barrier could prevent relocation. Other barriers, such as relocation expenses or the inability to sell a house were also cited, but the primary barriers are the relationships that tie people to their current communities—family ties or partners unwilling to relocate. These personal barriers may seem insurmountable—hiring incentives and training cannot help employers overcome these objections to relocation—but as the world becomes more and more mobile and connected, these barriers to relocation will diminish and relocation for work will increase. Often employers or relocation experts can offer relocation support such as providing for visits home or offering interpreters or language lessons to ease the individual's transition into a new culture.

Both individual employers and nations facing talent challenges must focus on attracting the right talent they need to sustain growth. By becoming a talent destination—a place where people want to work—they can ensure that they will continue to move forward as talent becomes more and more critical to success.

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With a network of 300 offices in cities across the country, Manpower has provided organisations in the UK with a continuum of staffing solutions from the incidental to the strategic for 55 years, working with businesses such as BT, IBM, Royal Mail and Xerox to help them win.

In the Human Age, where talent has replaced access to capital as the key competitive differentiator, Manpower UK leverages its trusted brand to develop a deep talent pool, providing clients with access to the people they need, fast.

Manpower UK creates powerful connections between organisations and the talent they need to enhance their competitiveness and unleash their workforce potential. By creating these powerful connections, we help everybody achieve more than they imagined, and power the world of work.

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About ManpowerGroup

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