

Decoding Global Talent, Onsite and Virtual

March 2021

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A study of 209,000 people
in 190 countries shows
big shifts in the map
of global mobility





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Decoding Global Talent, Onsite and Virtual

This is the first in a series about the pandemic's long-term impact on work.

If, 30 years ago, you had asked somebody from Brazil, South Africa, or the UK which foreign country they would most like to move to for work, there's a good chance that each person would have offered the same answer.

America. America. America.

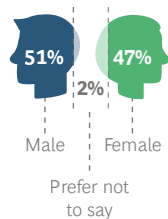
But the appeal of the US as a work destination has declined. Canada is now the first choice of foreign workers. Underscoring the shift in attitudes, two Middle Eastern cities and two Asian cities now rank higher than New York on the list of specific work destinations. And, in general, fewer people are interested in leaving their country for a foreign work assignment; the idea itself has lost some allure.

These findings reflect several new factors that have penetrated the world's consciousness and changed the workplace. The factors—the fallout from a difficult-to-control pandemic and a sharp rise in nationalism—have altered people's thinking. Businesses and governments must understand these new attitudes and make adjustments of their own in order to ensure they'll have the future workforce they need.

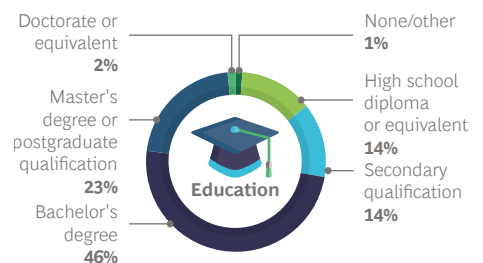
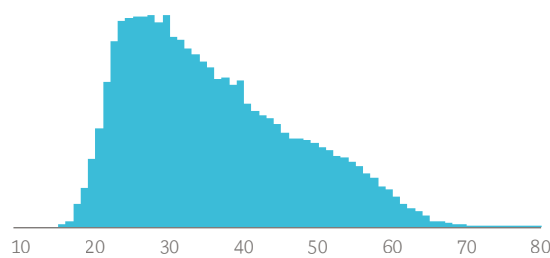
For this study—our third on global workforce trends, following [studies in 2014 and 2018](#)—Boston Consulting Group and The Network surveyed some 209,000 people in 190 countries to find out whether and under what circumstances they would move to a foreign country for work. (See [Exhibits 1 and 2.](#)) The lower willingness to move that we found this time undercuts previous narratives about the fluidity of talent in a global economy. But respondents demonstrate flexibility in different ways—about working remotely for a foreign employer, for instance—and execu-

Exhibit 1 - Demographics of Survey Respondents

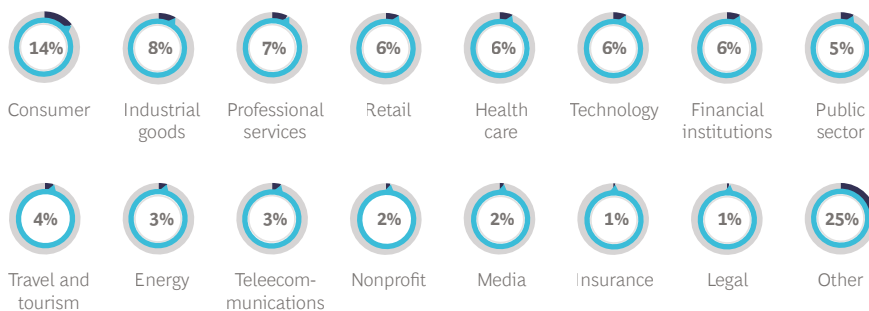
208,807
Workforce respondents



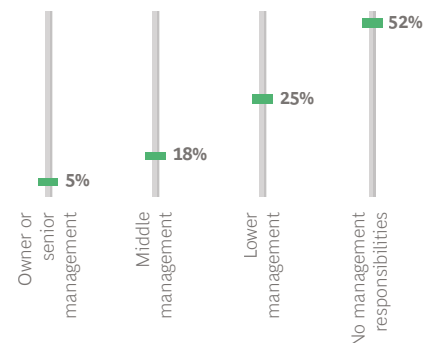
Age distribution



Industry



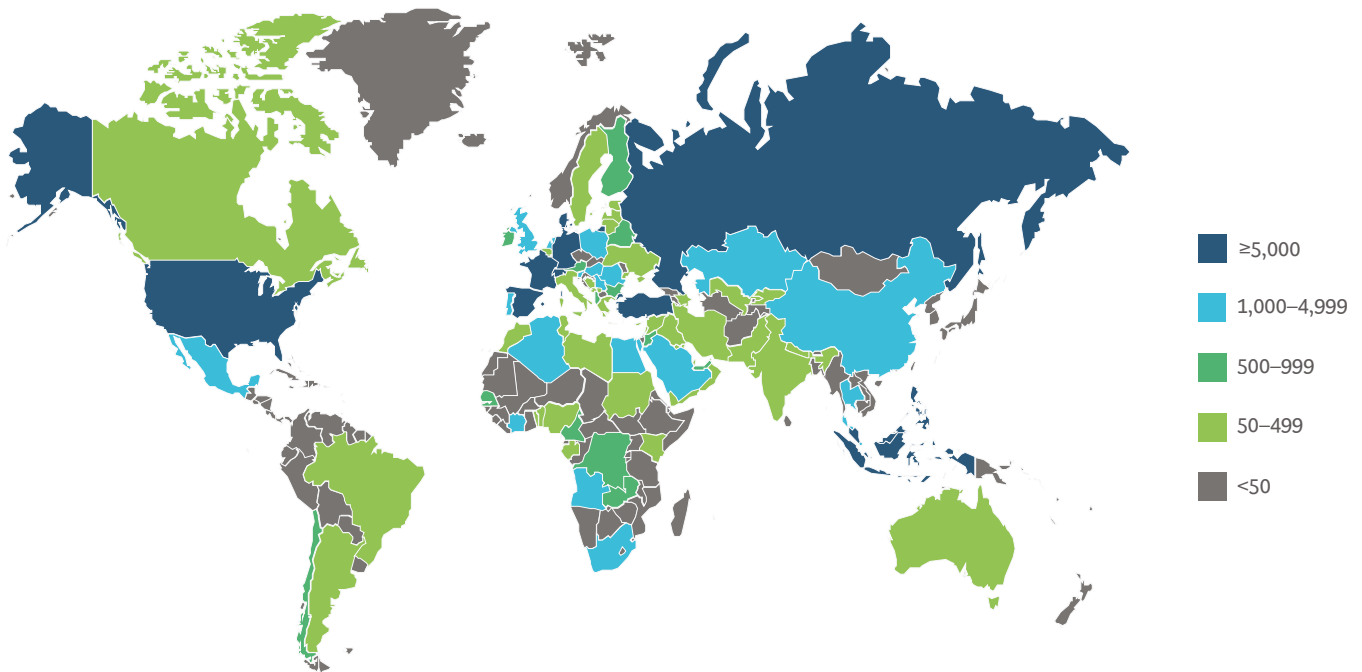
Position



Source: 2020 BCG/The Network proprietary web survey and analysis.

Note: Some percentages do not total 100 because of rounding.

Exhibit 2 - A Survey of 208,807 Workforce Respondents in 190 Countries



	Americas	Middle East and Africa	Europe	Asia		
5,000 or more respondents	US		Turkey Russia Denmark France Germany	Spain Switzerland Indonesia Philippines Singapore Malaysia		
1,000–4,999 respondents	Mexico	Angola Algeria Egypt	Ivory Coast Saudi Arabia South Africa	Hungary Kazakhstan Netherlands Poland Portugal	Romania Serbia Slovenia UK	China Thailand
500–999 respondents	Chile	Cameroon Democratic Republic of the Congo Jordan Senegal United Arab Emirates Zambia	Albania Austria Belarus Bulgaria	Finland Ireland Luxembourg		
50–499 respondents	Argentina Brazil Canada	Benin Gabon Iraq Iran Kenya Kuwait Lebanon Libya Morocco	Nigeria Oman Qatar Sudan Syria Togo Tunisia Yemen	Azerbaijan Belgium Bosnia and Herzegovina Cyprus Estonia Greece Italy Kosovo	Kyrgyzstan Latvia Lithuania Sweden Ukraine Uzbekistan	Australia India Nepal Pakistan
Fewer than 50 respondents	Other Americas	Other Middle East and Africa	Other Europe	Other Asia and Pacific		

Source: 2020 BCG/The Network proprietary web survey and analysis.

tives can take advantage of these developments in the competition for talent.

We will share the findings of this year’s study in three publications. Here, we focus on how attitudes toward specific work destinations have shifted and changes in the definition of mobility. (See the sidebar, “Methodology.”) In the coming months, we will publish two follow-on reports, one on new work models and preferences in the wake of COVID-19 and the other on changes in people’s career prospects and expectations.

A Decrease in Willingness to Work Abroad

When we conducted our first survey about people’s willingness to move to another country for work, in 2014, almost two-thirds of global respondents said the idea appealed to them. The proportion has declined by 13 percentage points since then and is now about 50%, a drop rooted in both nationalistic immigration policies and, more recently, the COVID-19 pandemic. (See Exhibit 3.) The travel restrictions that have come and gone during the pandemic have clearly had an impact on people’s attitudes. Relocation willingness has also been affected by the trend toward remote work. For instance, in some cases foreign employers have been willing to offer applicants a job without requiring

them to work in any company office. To get the benefits of a foreign job without having to relocate may, to some people, be the best option of all.

People in the Middle East and North Africa—known as the MENA region—are the biggest exception to the declining interest in working abroad. Perhaps because countries like Nigeria, Yemen, Sudan, and Tunisia don’t offer the same career opportunities as can be found in the West, willingness to relocate hasn’t fallen significantly since 2018. And, in a handful of countries—including Brazil and several European countries—willingness to move abroad has gone way up. Italy and Sweden are in this group, possibly because of concern among those who live there about their own country’s COVID-19 responses.

But the people with this view are in a decided minority. (See Exhibit 4.) For every country whose inhabitants are now clearly more willing to move abroad for work than they were in 2018, there are more than three where such “willingness” has declined. (Our definition of a significant change is a difference of 3 percentage points in either direction since 2018. Roughly a quarter of countries show a change that’s below this—or show no change at all.)

Exhibit 3 - Willingness to Move Abroad Has Been on the Decline

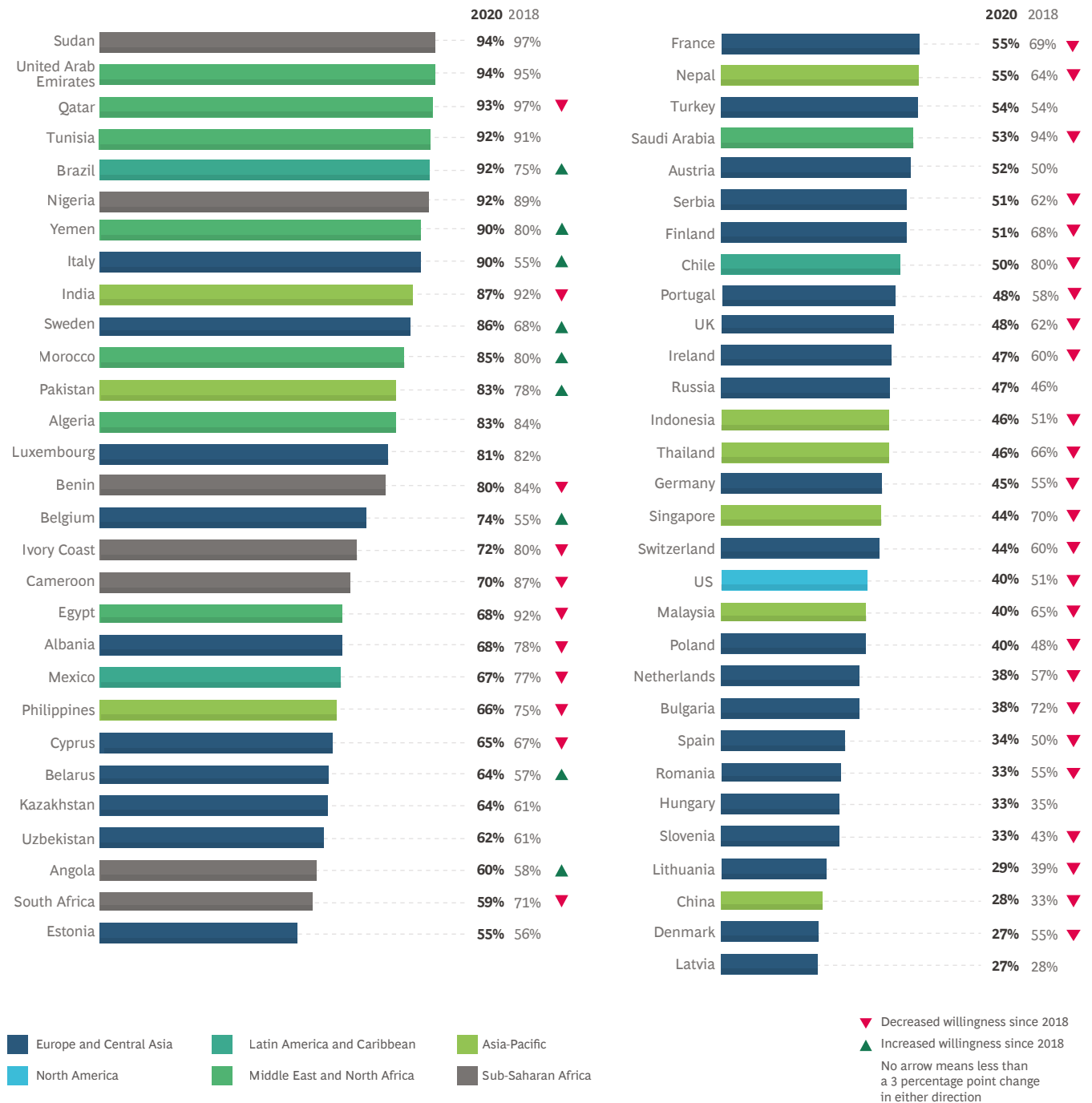
Percentage of respondents who are already working abroad or are willing to move abroad for work



Source: 2020 BCG/The Network proprietary web survey and analysis.

Exhibit 4 - Interest in Working Abroad Has Declined in Most Countries

Percentage of respondents in each country who are already working abroad or are willing to move abroad for work



Source: 2020 BCG/The Network proprietary web survey and analysis.

Note: Listed are the countries from which there were more than 100 responses.

A Reordering of the Top National Destinations

The most striking shift in our survey is the fall of the US from the top spot. Hurt by an inconsistent pandemic response, the adoption of more nationalistic policies, and social unrest, the US has fallen to second in the rankings, behind Canada and basically in a tie with Australia. (See Exhibit 5.)

Canada and Australia are similar to the US in having English as an official language. But Canada and Australia have both done a far better job of pandemic management. They are also seen as having better social systems and more open cultures than the US. Canada and Australia “take good care of their people,” said Sudha Lakshmi, a 48-year-old health insurance manager from India. She said she would be open to relocating to either country.

The reputation Canada has built for itself is evident in its broad appeal. The country is the number-one work destination for many of the types of people that countries prize, including those with master’s or PhD degrees, those with digital training or expertise, and those younger than 30.

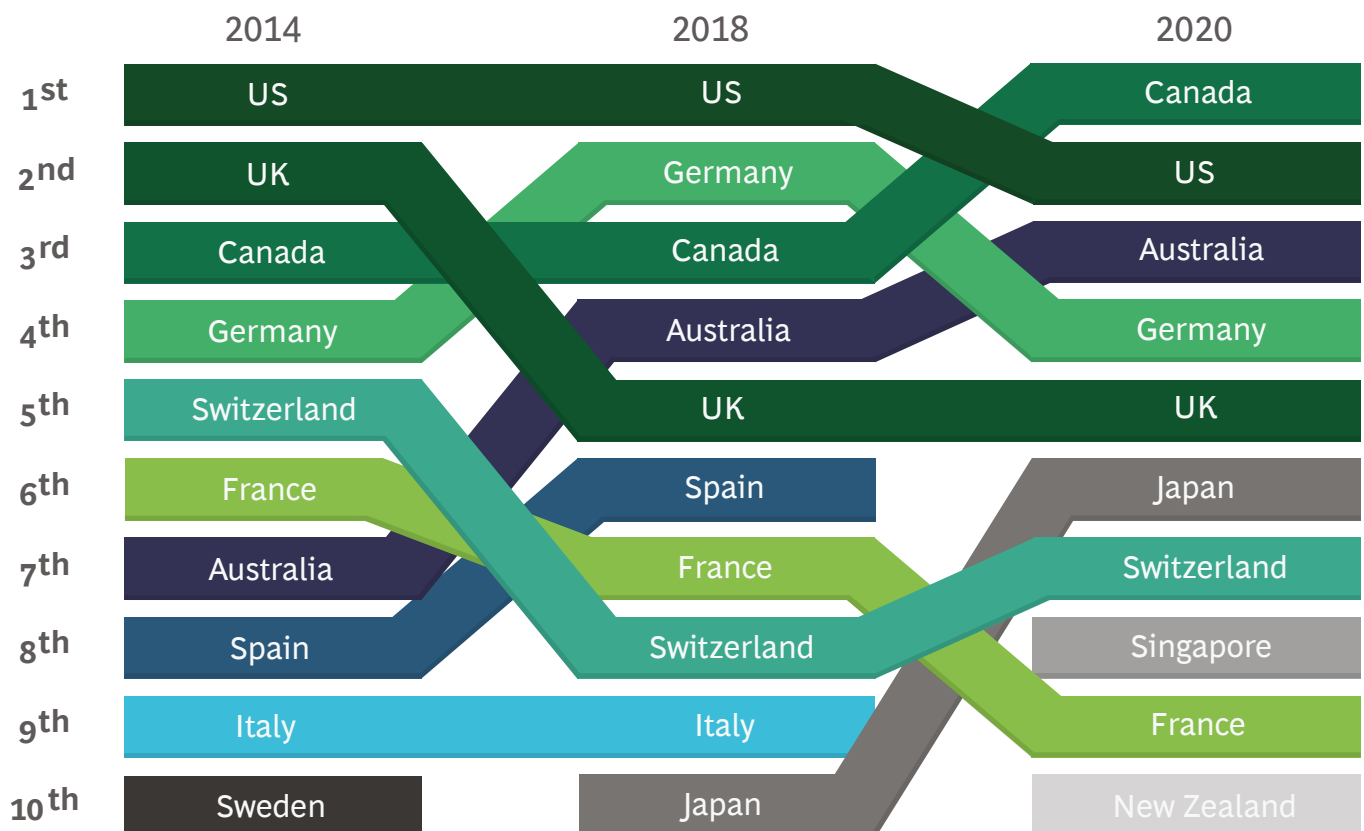
The US, despite having many of the world’s biggest and best-known technology companies, is second as a destination for those with digital talent. Australia is third. (See Exhibit 6.)

Another country that has fallen in the rankings is Germany. Despite the relatively good job that Germany did of combating the first wave of COVID-19, the country’s image has been tarnished by the European Union’s overall number of coronavirus cases. Another issue for Germany (which remains the top work destination in Europe, despite being down two spots in the overall ranking from 2018) may be a pullback from some of its previously strong support for immigration.

High reported infection rates are almost certainly the reason why Italy, France, and Spain have fallen in the rankings. All three were on our list of the top ten work destinations in 2014 and 2018; only France remains on the list today.

Exhibit 5 - Canada Replaces the US as the Top Destination

Ranked by percentage of respondents who would move to each country for work



Source: 2020 BCG/The Network proprietary web survey and analysis.

Exhibit 6 - Top Country Destinations by Demographics and Geography

Where people with different backgrounds say they would work

Rank among respondents by demographics	1	2	3	4	5	6	7	8	9	10
Highly educated	Canada	US	Germany	Australia	UK	Switzerland	France	Italy	Austria	New Zealand
Less educated	Canada	Australia	US	Germany	Japan	United Kingdom	Singapore	Switzerland	France	New Zealand
Digital talents	Canada	US	Australia	Germany	United Kingdom	Singapore	Japan	Switzerland	New Zealand	France
Blue-collar	Germany	Japan	Australia	Canada	US	Switzerland	Austria	UK	South Korea	France
White-collar	Canada	US	Australia	Germany	United Kingdom	Japan	Switzerland	Singapore	France	New Zealand
Younger	Canada	US	Germany	Australia	Japan	UK	Singapore	France	South Korea	Switzerland
Older	Australia	Germany	Canada	UK	US	France	Switzerland	Austria	Spain	Sweden

Rank among respondents by geography	1	2	3	4	5	6	7	8	9	10
Europe and Central Asia	Germany	US	Canada	Switzerland	UK	Italy	Australia	Austria	France	Sweden
North America	Canada	Australia	UK	Germany	France	Italy	Japan	Ireland	Bahamas	New Zealand
Latin America and the Caribbean	Canada	US	Spain	Germany	Australia	UK	France	Italy	Switzerland	Argentina
Middle East and North Africa	Canada	United Arab Emirates	Germany	Qatar	France	US	Kuwait	UK	Saudi Arabia	Australia
Asia-Pacific	Australia	Japan	Singapore	Canada	US	South Korea	New Zealand	Malaysia	UK	Germany
Sub-Saharan Africa	Canada	France	US	Portugal	UK	Belgium	Australia	Germany	Brazil	Switzerland

Source: 2020 BCG/The Network proprietary web survey and analysis

Note: Highly educated is defined as having a master’s degree, a doctorate, or the equivalent. Less educated is defined as having a high school or no formal education. Digital talents are defined as those holding a job in digital and analytics or IT and technology. Blue-collar is defined as having no formal education or high school degree, and a job in the service sector or manual or manufacturing work. White-collar covers all other respondents. Younger workers are defined as younger than 30. Older workers are defined as older than 60.

Asia-Pacific countries, by contrast, have done a better job of containing the virus, and this has helped them move up in the rankings. Indeed, two Asia-Pacific countries are among the top ten for the first time: Singapore, which has surged ten spots since 2018 and is now eighth, and New Zealand, which is now tenth. New Zealand has been a model of effective coronavirus management almost since the pandemic began and has other appealing characteristics.

“It’s my first choice for relocation,” Miloš Vukadinović, a 36-year-old Serbian freelance consultant who has two young children, told us about New Zealand. “It is one of the most politically settled countries in the world, has a great education system, and generally offers high remuneration.” Two European countries, Switzerland and Norway, are also on Vukadinović’s list. “I would also be willing to move to Singapore,” he added, “because of all the great job opportunities and high salaries.”

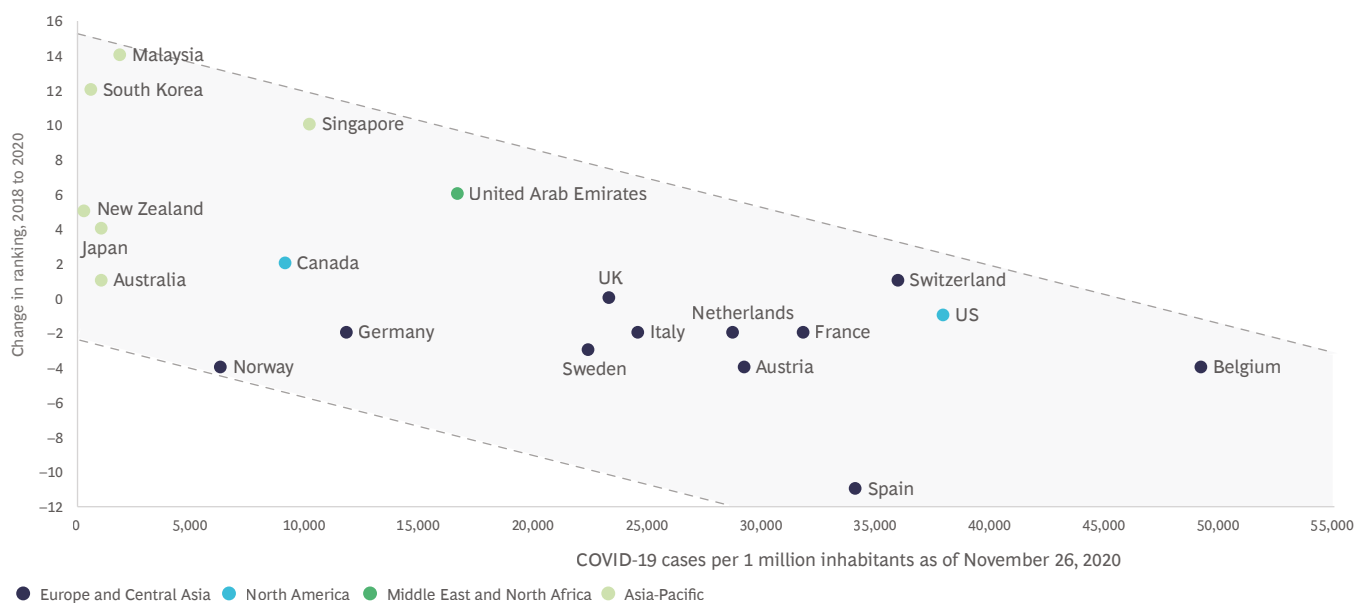
Strong pandemic management has also boosted Japan and South Korea. Japan has reached number six on the list of top work destinations. And South Korea, although not on the top-ten list, has risen rapidly and is now number 12. (It was 24th on the list in 2018 and 37th in 2014.) This is quite a showing for a country whose language isn’t widely spoken, and it illustrates the weight that respondents are placing on public health after millions of COVID-19 deaths and widespread business shutdowns around the world. (See Exhibit 7, which plots changes in ranking against COVID-19 cases per capita.)

**The US has fallen to second place
as a work destination, behind
Canada.**



Exhibit 7 - Higher COVID Caseload? Your Appeal Is Probably Falling

How countries have changed in the rankings compared with their COVID-19 levels



Sources: World Health Organization COVID-19 cases; 2020 BCG/The Network proprietary web survey and analysis.

Note: Countries displayed are the top 20 countries where people said they would relocate in 2020.

The Latest City Preferences

For the third time in as many surveys, London is the most frequently mentioned city work destination in the world. The fame and reach of the British Commonwealth give London an aura that helps it overcome geopolitical uncertainties, such as those surrounding Brexit that have dogged the UK as a whole in recent years.

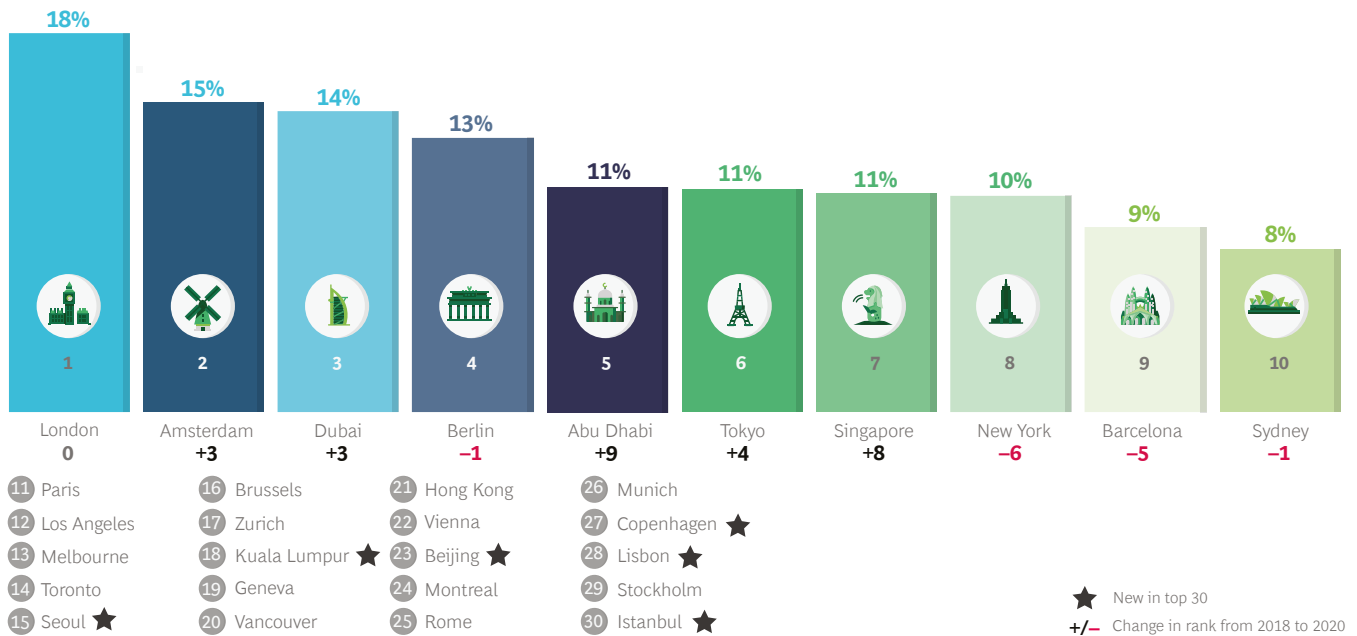
Other European cities on the list are Amsterdam, which is now number two among work destinations globally, and Berlin (number four). Both have dynamic startup scenes and are seen as hubs of innovation.

The United Arab Emirates' effort to turn its premier cities into desirable work destinations seems to be succeeding. Dubai is now third among cities after being sixth in 2018, and Abu Dhabi is fifth after not being on the top-ten list at all in 2018.

The same factor that accounts for Asian countries' growing appeal as work destinations—an effective pandemic response—has boosted the perceived attractiveness of two Asian cities, Tokyo and Singapore.

Exhibit 8 - Asian and Middle Eastern Cities Are Now Among the Top Destinations

Ranked by percentage of respondents willing to move to each city



Source: 2020 BCG/The Network proprietary web survey and analysis.

Some previously popular Western cities have moved in the opposite direction. New York has fallen to number eight, undoubtedly because it was initially an epicenter of the pandemic and because the city’s attractions and cultural institutions are still largely shut down. (New York was the number-two work destination city in 2018.) In another example, Barcelona is now the ninth-most-popular foreign city to move to for work after being fourth in 2018.

Although Canada is the world’s current premier work destination, no Canadian cities are in the top ten. Canada’s highest-ranked city is Toronto, which places 14th in our survey. (See Exhibit 8.)

A Different Kind of Mobility

During the pandemic, many people gained experience in working remotely for their employer. This has focused attention on the idea of remote work in all its incarnations, including for a new employer located in a different country than the country a person lives in.

Virtual mobility has an understandable appeal at a time when the usual modes of working have been called into question. Fifty-seven percent of respondents say they are willing to work remotely for an employer that doesn’t have a physical presence in their home country, a level that is well above the proportion who are open to physical relocation. (See Exhibit 9.) About one-quarter of respondents say they aren’t sure and would have to think about it more. Relatively few, however, reject the idea outright.

Why would they?

Remote international work is a model that allows people to offer their services to the highest bidder without having to uproot their lives or make their families follow them to a new country.

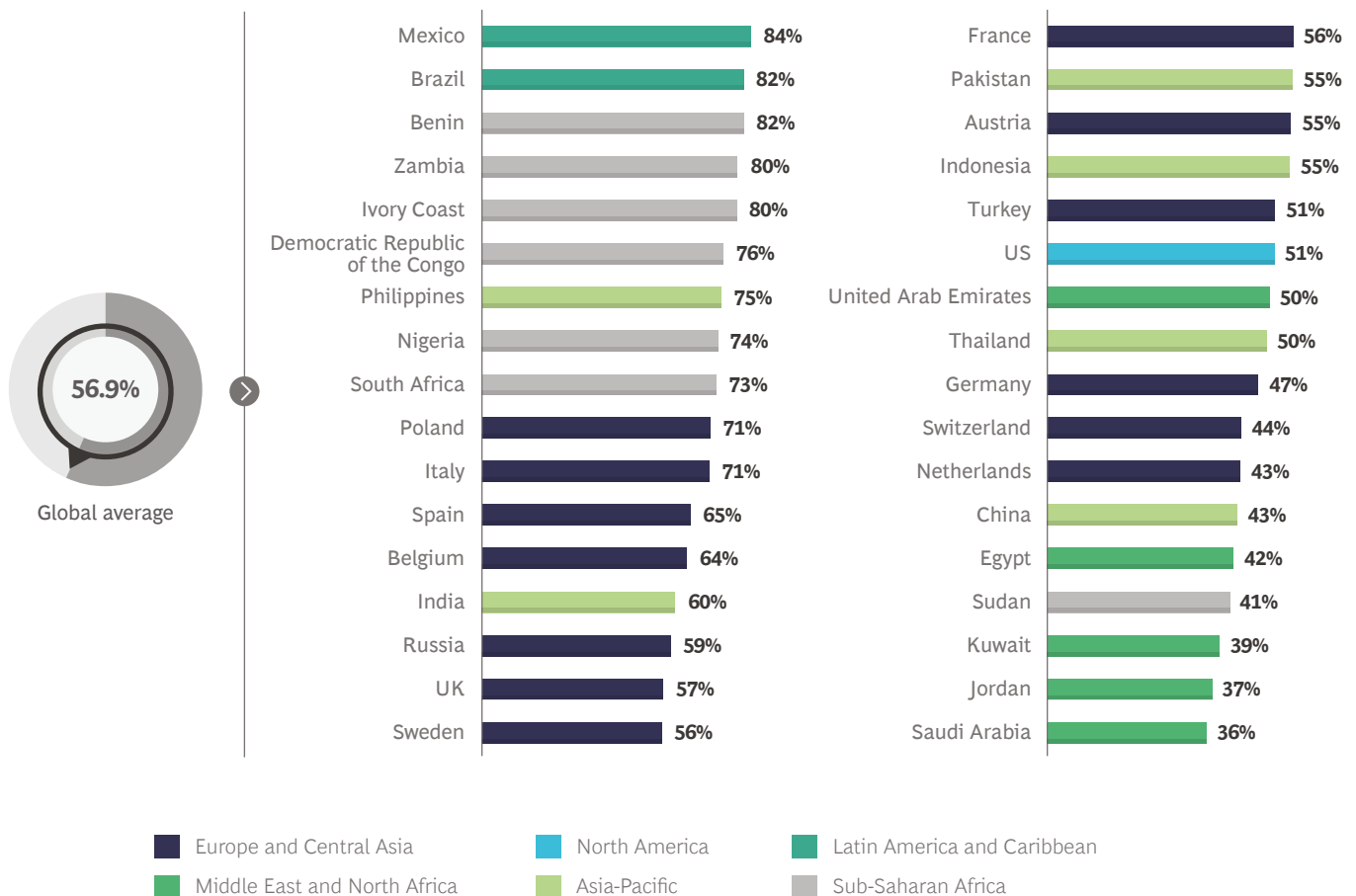
The willingness to work for a foreign employer remotely is highest in regions with less-developed economies, such as sub-Saharan Africa, Latin America, and the Caribbean. But some European respondents also find the idea appealing, as do about half of those in the US. This work model is less appealing in China, which has an abundance of in-country employment opportunities. It's also less appealing in the Middle East, where people's interest in overseas work may be more bound up in a desire to experience a social and cultural setting that's different from their own.

The overall openness to virtual work may be of particular interest to employers, especially the many employers that struggle to fill jobs in the IT and digital fields. Among respondents in these fields, our survey reveals a high level of comfort with the idea of virtual mobility. Seventy-one percent of people with digital or analytics backgrounds say they are willing to work for a company with no physical presence in their own country, and so do 67% of people with IT and technology backgrounds. Among people with master's degrees or above (doctorates, PhDs, and MDs), the willingness quotient is likewise quite high: about 62%.

Of course, the infrastructure of some less-developed countries can get in the way. Several survey respondents in sub-Saharan Africa with whom we did follow-up interviews said it would be hard to stay in their countries while working for a foreign employer. "The technology here wouldn't allow me to do that properly," one said.

Exhibit 9 - International Remote Work Appeals to Many

Percentage of respondents who would work remotely for an employer with no physical presence in their country



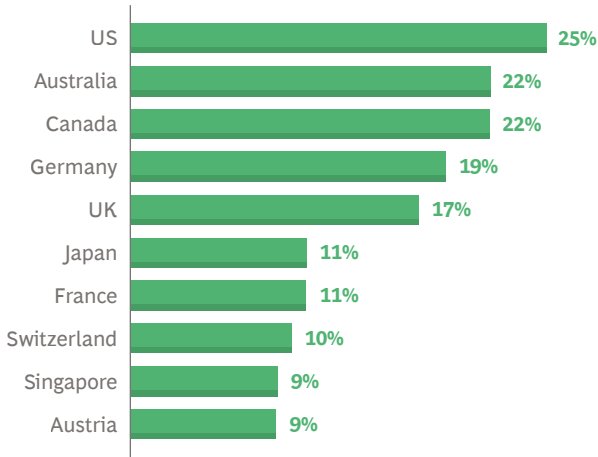
Source: 2020 BCG/The Network proprietary web survey and analysis

Note: Countries displayed are the top 30 by either GDP or working population, or the top and bottom 5 outliers in percentage of respondents who would work for an international remote employer.

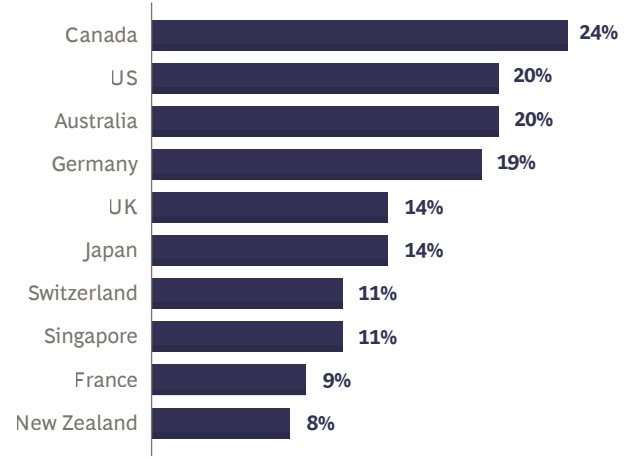
Exhibit 10 - The US Returns to the Top Position When the Question Is About Virtual Work

Percentage of respondents who say the country appeals to them

As a destination for international remote employment



As a place to move to for work



Source: 2020 BCG/The Network proprietary web survey and analysis.

Note: “International remote employment” is defined as being employed by a foreign company that has no physical presence in one’s country.

When the question is about working for a foreign employer remotely versus having to pull up stakes and move to a country where the employer has physical offices, the preferred destinations shift in some interesting ways. The US is the most desirable destination under this scenario, suggesting that American employment retains a lot of appeal if you take away the political and social risks that come with living in the country. (See Exhibit 10.) In general, it makes sense that a person evaluating an offer to work fully remotely for a foreign company would focus solely on the job offer—compensation, job content, and how well established the employer is. Other factors—such as the cultural attractions of the country where the employer happens to be—matter less in a fully remote work scenario.

The New Mobility and How to Capture Its Benefits

In our 2018 report, we discussed the challenges that employers and governments will face in recruiting the next generation of talent. The challenges include workers’ changing goals and attitudes, the intense competition for the workers with the most critical skills (such as IT and digital), and the fragility of countries’ brands. Meeting these challenges, we argued, requires rigorous strategic workforce planning, creative talent attraction, and smart employer-branding strategies. Not to take these steps, we said, would be to risk low or stagnant growth.

This year's findings show that the risk of being talent constrained has increased because regulatory barriers impede the free flow of skills and because fewer people want to relocate.

International Remote Employment as a Strategy. On a national level, an embrace of virtual mobility could mean a reversal of some of the skills shortages that countries face. Virtual mobility also presents an opportunity to multinational companies—allowing them to tap into talent that exists elsewhere without having to pay to relocate people or build up physical presences in foreign countries where specialized human expertise may be concentrated. It also may allow companies to become more diverse—for example, by employing people with different backgrounds or in underrepresented communities. That diversity can then be a calling card for companies, helping them attract highly trained workers from other parts of the world.

Some companies have already gravitated to this model of building a global workforce. For instance, the almost 1,300 employees of the software integration company GitLab live in 65 countries, none of which has a GitLab office. Likewise, Automattic's 1,200 employees, in 70 countries, all work fully remotely. (Automattic's main product is WordPress, a website software service.)

Nor is the model being used only by small digital pioneers. Tata Consultancy Services, a Mumbai-based information technology services company, has said it expects three-quarters of its 500,000 employees to work remotely by 2025. Likewise, Facebook and Microsoft are embracing the idea of location flexibility and laying the groundwork to implement remote international employment on a broad scale.

Obstacles That Companies and Governments Must Overcome. To be sure, traditional multinationals and economies will face more challenges in adopting virtual mobility relative to small tech-based companies. Among the hurdles and possible solutions:

- **Legal and Regulatory Complexity.** Taxes, labor law, and work regulations are very different in, say, China, France, and the US. These are realities that HR departments must contend with when employing people in countries where they have no preexisting expertise. Providers that specialize in global payroll, administrative, and insurance services may help; governments can offer support too. Indeed, 17 governments (including some in Europe and the Caribbean) have already introduced visas that simplify the recruitment of foreign digital workers. Some of the countries offer tax exemptions to the foreign employees they need the most.
- **Cultural Integration.** This is one of the harder things to accomplish. Matej Hrapko, a 41-year-old Slovakian working in Austria as a mechanical engineer for an automotive company, summed up the challenge: “You would still need to get used to a company’s thinking and culture” if you relocated virtually. “That’s very important.” To evaluate cultural fit, employers could implement extended tryout periods. This is the tactic used by Automattic, which delays hiring decisions until candidates have worked on a contractual basis, sometimes for as long as eight weeks. At GitLab, a virtual buddy system facilitates immersion into the corporate culture.
- **Time Zone Problems.** Even when only two time zones are involved, it can be hard for multinationals to set up meetings and coordinate their activities. The problem could become paralyzing with a distributed workforce across multiple time zones—especially if there were an insistence on doing work through meetings squeezed into the few hours of overlapping working time between regions. Instead, companies must develop good ways of collaborating and of “passing the baton” between teams, and they must make more use of asynchronous written communications. GitLab, for example, keeps all details of its operations and decisions in a publicly accessible online “handbook,” making attendance at every video call less important.
- **Salary Strategy.** This highly sensitive topic requires careful planning. Do you compensate a remote foreign employee based on his or her cost of living or on the labor market where the employee lives? For that matter, do you worry about paying the person less than you pay someone who has the same position but works in the home country headquarters? There are no easy answers, as became clear in a conversation we had with a Silicon Valley manager who told us what happens when his company’s engineers want to move back to their home country. In many parts of the world, the cost of labor is lower than in the San Francisco Bay Area, of course, and some of these engineers must be willing to accept pay cuts of 30% to 50% as a condition of geographical flexibility. By contrast, the virtual mobility pioneer Automattic aims to pay every employee in the company, no matter the location, the same base salary for the same position. Each employer must weigh the pros and cons of various approaches and think creatively about its compensation strategy.

- **Data Protection Differences.** Many of the situations that lend themselves to international remote employment involve the handling of data. This creates risk and the potential for confusion as data moves across international borders. It may be necessary for companies to work closely with regulators to ensure compliance and to educate employees about different countries' privacy laws. Another temporary solution may be to limit international remote employment programs to countries where the employer has a legal presence.

If you're a company or government that hasn't previously considered international remote employment as a way to address your skills shortages, it may sound like a very complicated thing to do. In fact, you're probably more ready than you think.

If you've ever allowed a valuable employee to relocate to a foreign country for family reasons while continuing to work for you, if you've been investing in online communications tools to let people interact in the more modern ways that they prefer, or if you instituted work-from-home policies during the pandemic, then you've already started down a path that will make it easier to tap into the emerging global remote workforce. You just have to make a few adjustments to what you're already doing to have the world open up to you.

Next in the series: how COVID-19 is shaking up people's preferred ways of working.



Methodology

BCG and The Network (together with its affiliate organizations) conducted this survey between October and early December of 2020. All told, 208,807 people, in 190 countries, participated. The sample includes about an equal proportion of men and women, most of whom work in commercial industries. (The public sector and nonprofits are also represented.) The respondents are mostly early- and mid-career, and the majority are 20 to 40 years of age. Almost three-quarters of them have a bachelor's degree or above.

The 40-question survey elicited workers' attitudes regarding a variety of topics, including their willingness to work abroad, the countries (other than their own) that they would most like to work in, and the impact of COVID-19 on their work preferences, employment situation, and willingness to learn new skills.

The information gathered in the survey (which included people's nationalities and level of hierarchy in their organizations) made it possible to analyze workers' attitudes along a variety of parameters.

BCG also conducted follow-up Zoom interviews with select study participants around the world. Those interviews furnish the direct quotes that appear in this report.

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If you would like to discuss this report, please contact the authors.



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