

The logo for Totaljobs, featuring the word "Totaljobs" in white, bold, sans-serif font centered within a green rectangular box. Below this box is a smaller, solid green square.

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Decoding Global Talent

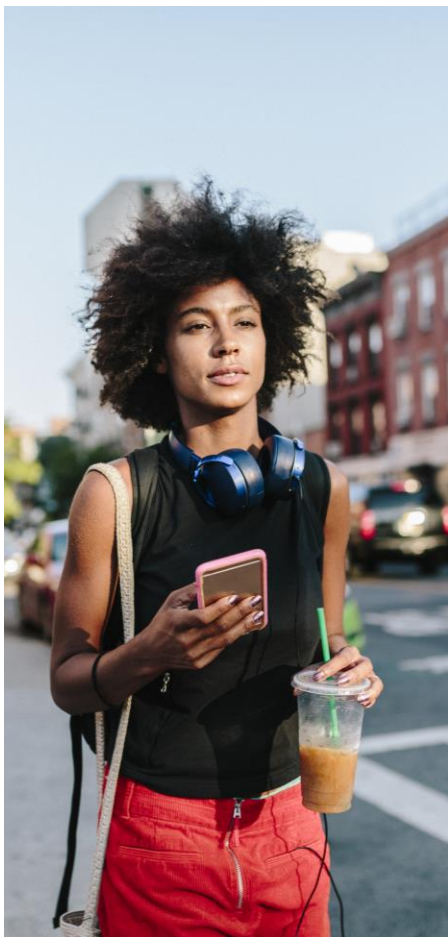
How Covid-19 is changing workforce mobility



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Agenda

- How Covid-19 has reshaped workforce preferences and migration trends
- The most popular cities and countries for the global workforce
- What these changes mean for your organisation
- **Panel discussion:** How to navigate the challenges presented by increased virtual mobility

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A bit about us



Kate Kavanagh

Managing Director
The Network



Nick South

Managing Director and Partner
Boston Consulting Group



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Boston Consulting Group

- Boston Consulting Group partners with leaders in business and society to tackle their most important challenges and capture their greatest opportunities.
- BCG was the pioneer in business strategy when it was founded in 1963.

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The Network and our partners



THE NETWORK 
Global talent simplified

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State of play

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State of play

Employment and the global labour market

Source: Organisation for Economic Co-operation and Development,
International Monetary Fund

- **Over half** of the world's population placed into 'lockdown'
- Euro area unemployment rate was **8.3%** in December (**1%** higher than pre-pandemic)
- US unemployment rate was **6.7%** in December (**3%** higher than pre-pandemic)
- OECD predicts global unemployment could stand at **8.9%** by end of 2021
- Estimates suggest **15%** of the workforce in 35 countries are at high risk of being furloughed or made redundant

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State of play

Covid-19 and the vaccination programme

- **110 million** confirmed cases of Covid-19 worldwide
- Vaccination programme underway across the world
- **USA** and **China** have given highest total number of vaccine doses
- **Israel**, **UAE** and **UK** top the list for most doses per 100 people

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The Global Talent Survey

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208,807

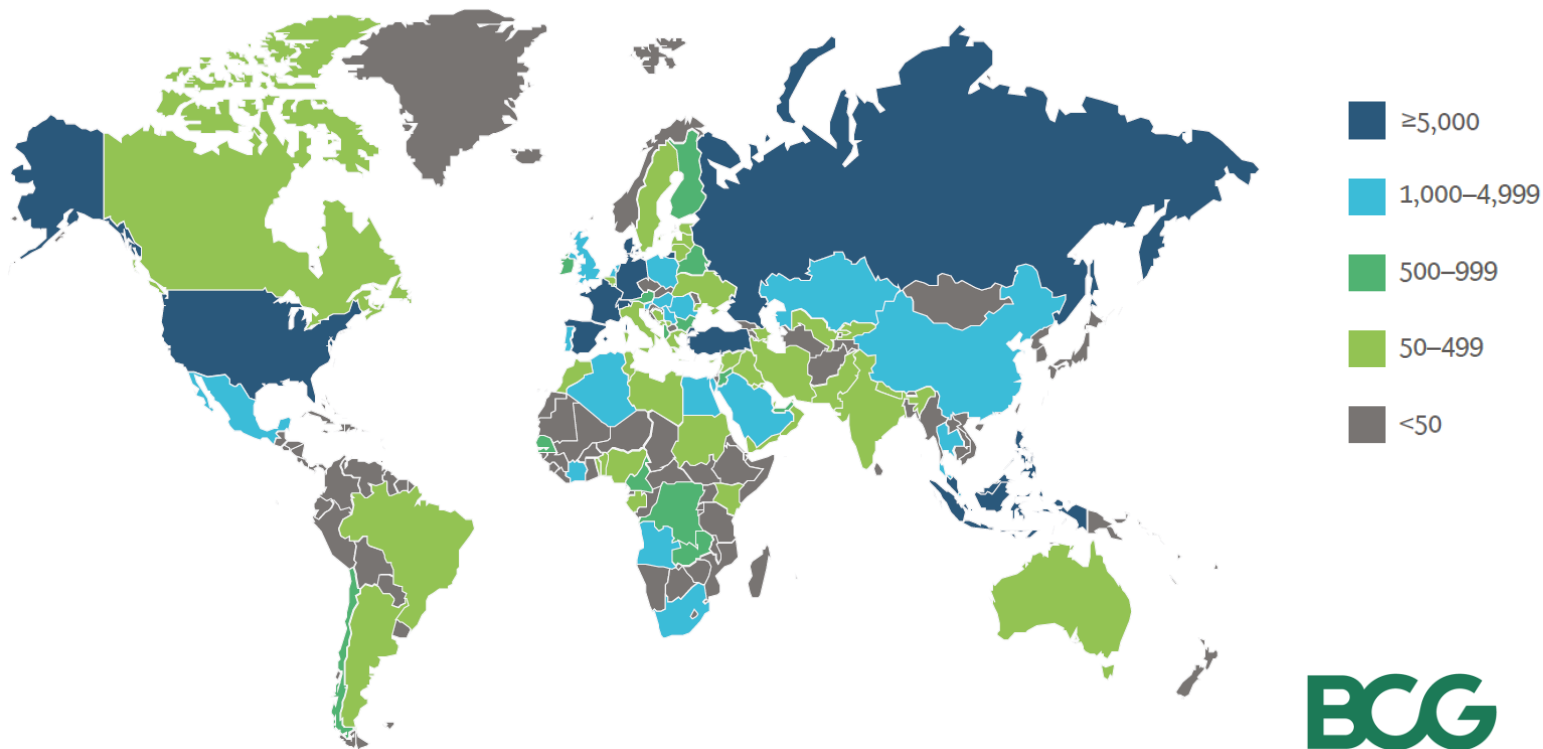
respondents
across the Americas, Middle East,
Africa, Europe, Asia-Pacific

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Insights from 190 countries

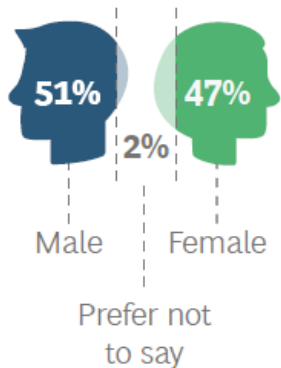


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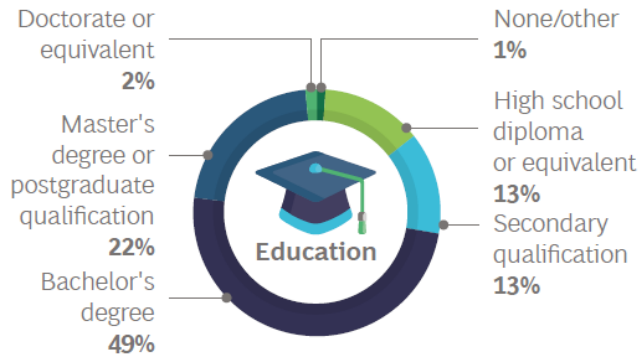
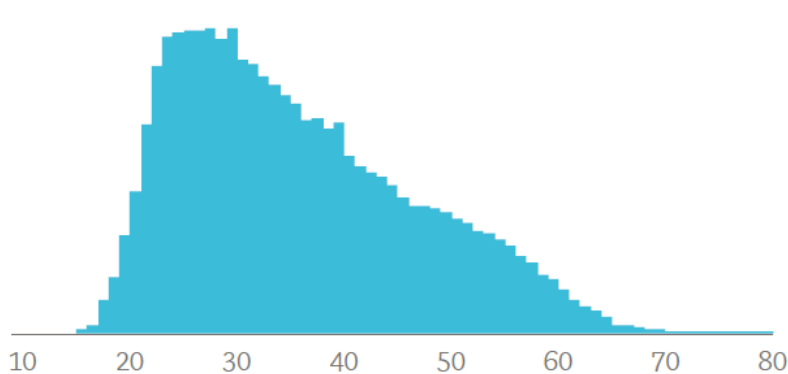
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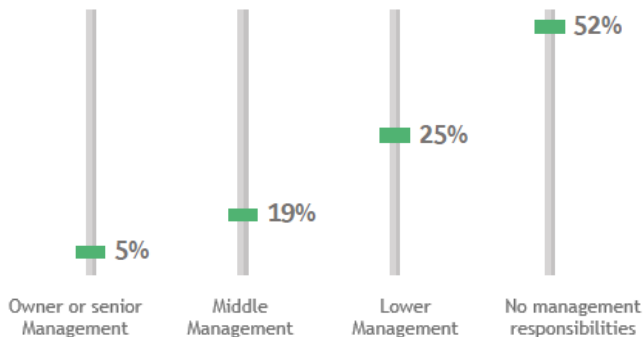
The global workforce



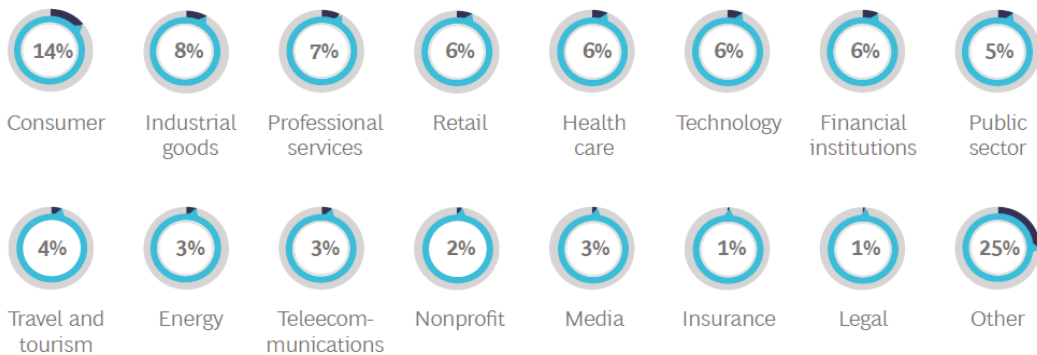
Age distribution



Position



Industry



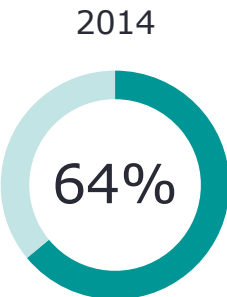
Impact of Covid-19 on mobility trends

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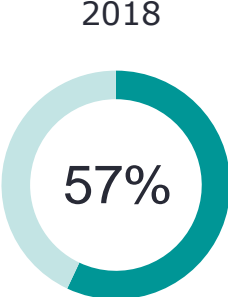
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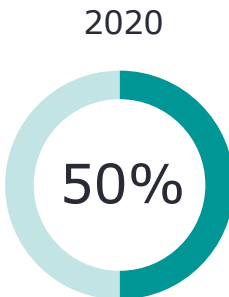
Willingness to move abroad for work has dropped



Willing to work abroad



Willing to work abroad

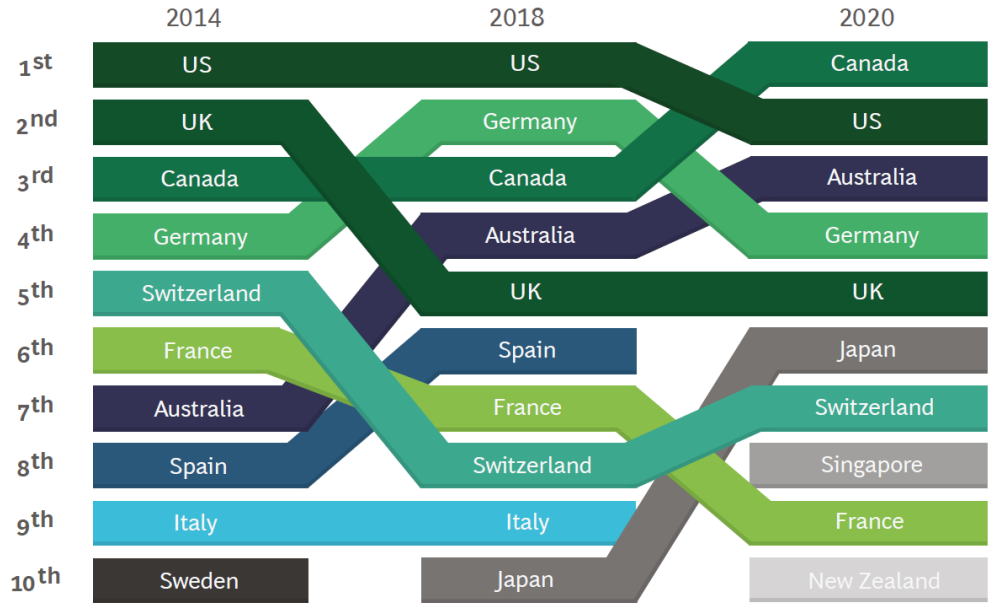


Willing to work abroad

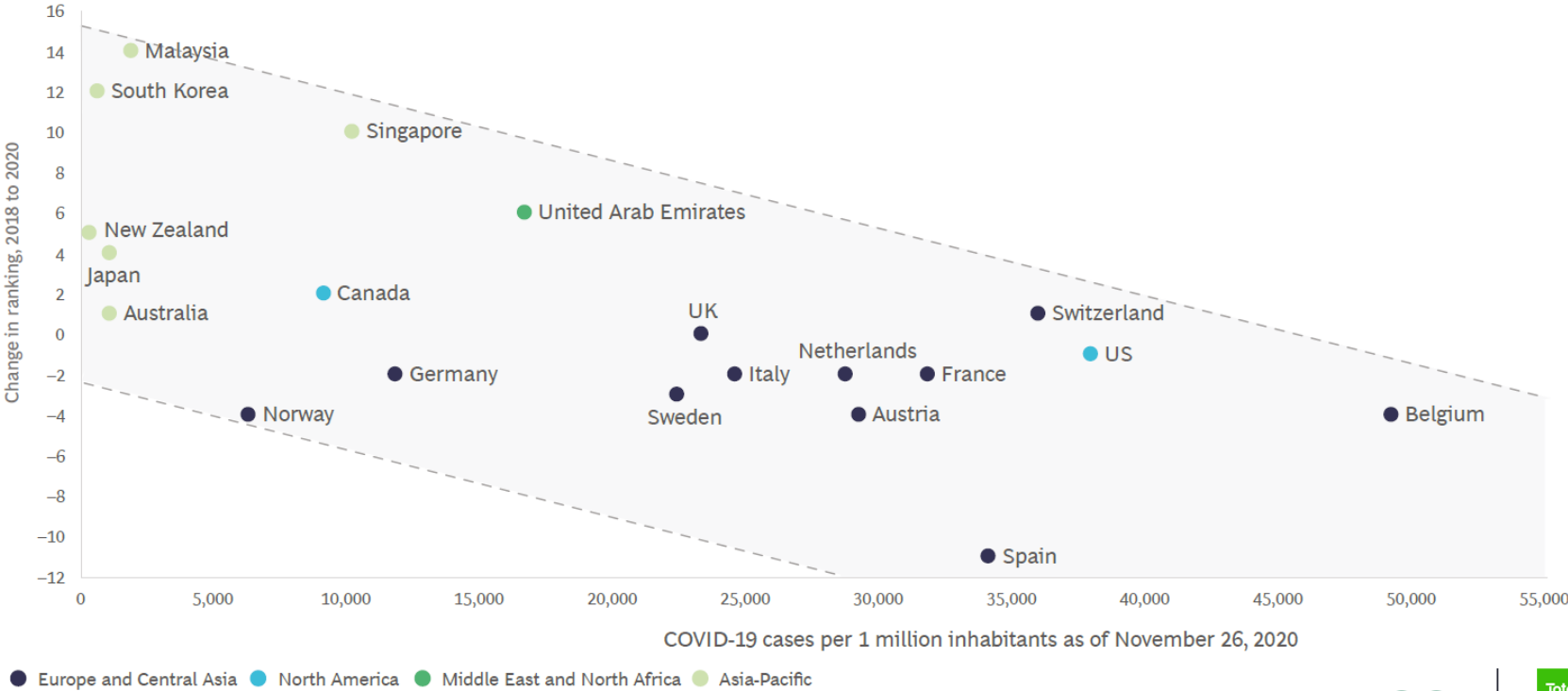


Most attractive countries for workers

- ↑ Canada takes number one spot from USA
 - UK remains fifth place after initial fall in 2014
 - Australia rises to third place
 - Japan jumps from tenth to sixth place
 - New Zealand and Singapore enter the top ten
- ↓ USA falls to second place
 - Italy and Spain fall out of the top ten
 - Germany falls from second to fourth place



Covid-19 has impacted worker perceptions of countries around the world



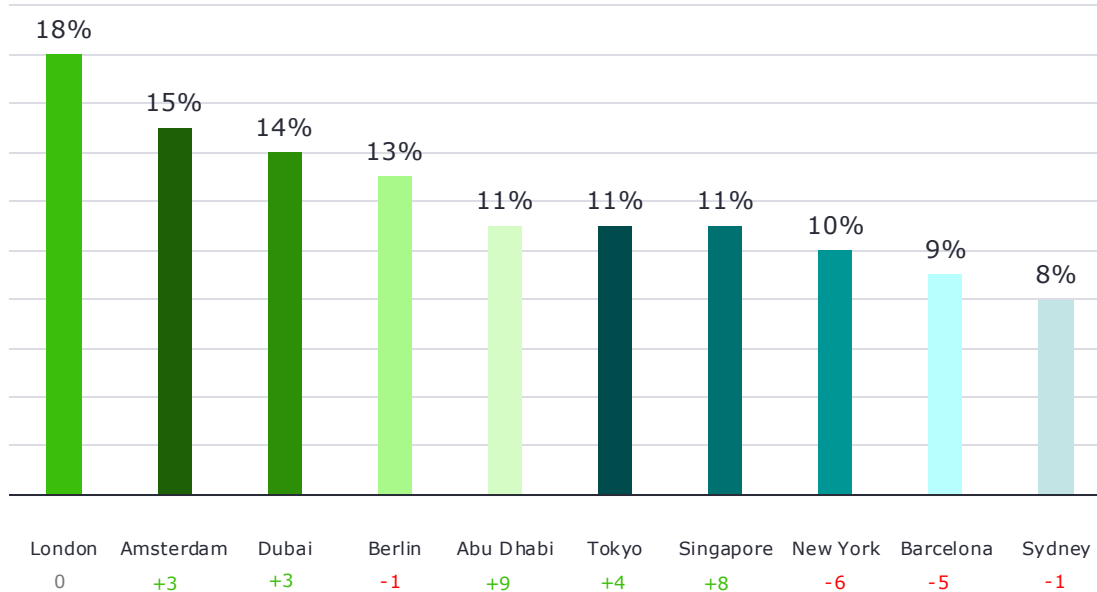
Shifting perceptions of cities

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Most attractive cities for workers



- London remains number one city
- Amsterdam and Dubai climb three places
- Berlin falls from 3rd to 4th place
- Abu Dhabi and Singapore are new entrants in top ten, climbing nine and eight places respectively
- Tokyo climbs four places
- New York sees the biggest fall of six, followed by Barcelona falling five places
- Sydney falls slightly from 9th to 10th



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Preferences by job type

“White collar” jobs

1. London
2. Amsterdam
3. Dubai
4. Berlin
5. Abu Dhabi
6. Tokyo
7. Singapore
8. New York
9. Barcelona
10. Sydney

“Blue collar” workers

1. Berlin
2. Amsterdam
3. Dubai
4. Abu Dhabi
5. Tokyo
6. London
7. Barcelona
8. New York
9. Los Angeles
10. Zurich

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Preferences by education level

University educated or equivalent

1. London
2. Berlin
3. Amsterdam
4. Dubai
5. New York
6. Barcelona
7. Abu Dhabi
8. Paris
9. Geneva
10. Singapore

High school education or equivalent

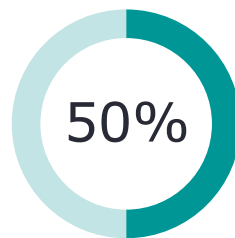
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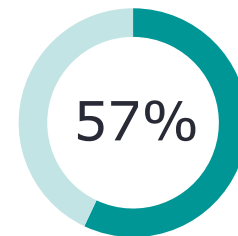
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Global workforce favours remote over moving abroad



Willing to work abroad



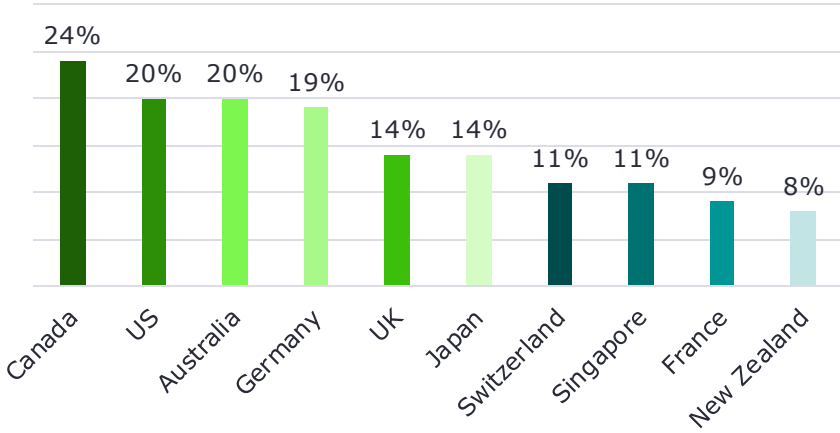
Willing to work remotely for an international employer

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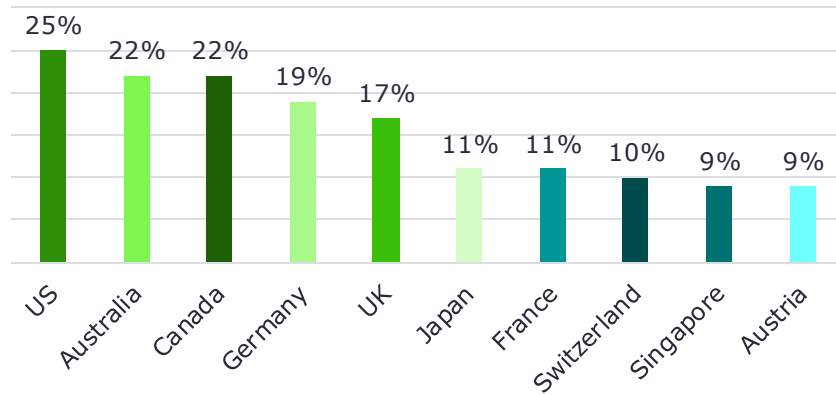
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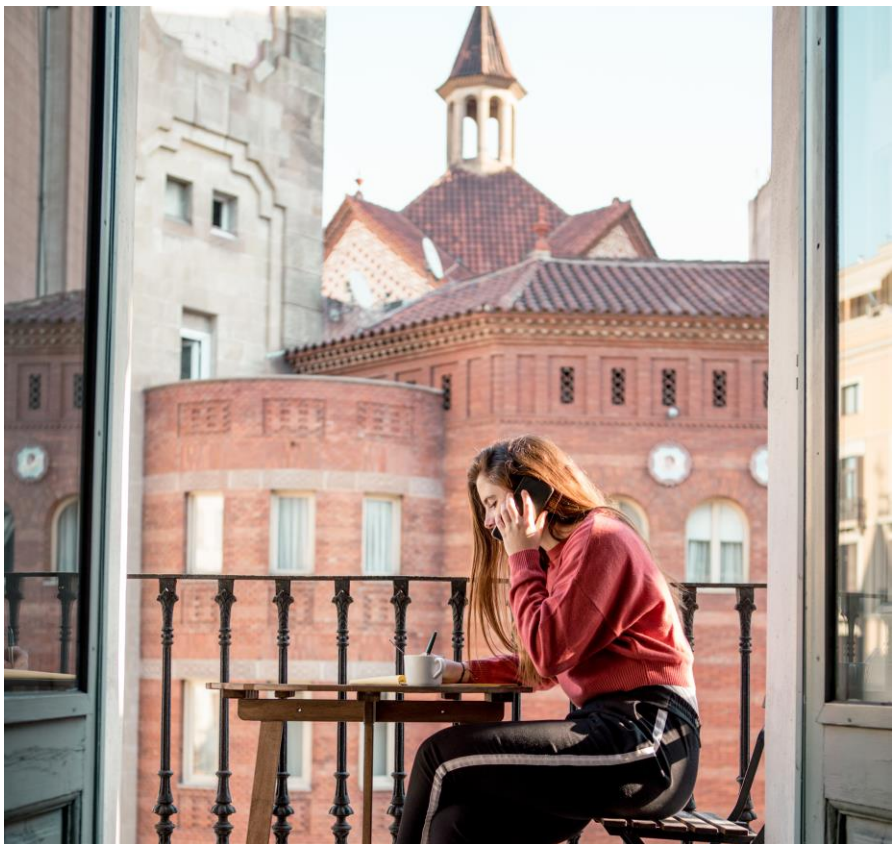
Physical mobility versus virtual mobility

Top countries people are willing to work in



Top countries people are willing to work remotely for





Going remote

Workers' willingness to work for an employer with no physical presence in their country

- People currently based in Mexico, Brazil, Benin, Zambia and the Ivory Coast are the most open to work remotely for an international employer
- Egypt, Sudan, Kuwait, Jordan and Saudi Arabia among the least willing
- **57%** of UK workers willing to work remotely, compared to **51%** in USA and **47%** in Germany

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What businesses should consider

Future of work

How we work: Embrace disruption

- How have customer interactions changed?
- How can we better serve customers?

How we lead: Empower and inspire

- How can we support employee wellbeing?
- How do we drive affiliation and community virtually?

How we organise: Responsive yet resilient

- Which ways of working will support a range of work models?
- Can we leverage location-agnostic, new talent models?

What we need: Smart environments

- How should the workplace of the future be designed?
- What should our real estate footprint look like?



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Key findings

Global workforce less willing to work abroad following Covid-19

London's brand outshines the UK as a whole

Canada takes the number one spot from USA in country rankings

Remote work unlocks more international opportunities



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Business leaders panel



Jon Wilson

CEO

Totaljobs Group, UK



Chris Forman

CEO

Appcast, USA



Kerstin Rothermel

Chief People Officer

StepStone, Germany



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