jobstreet by seek

Decoding Global Talent 2024

Mobility Trends

Understanding the preferences of a dynamic, global workforce.



Philippines

BCG BOSTON CONSULTING GROUP

THE NETWORK
Global talent simplified

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Introduction

About the study

Do people still want to move abroad for work? And if so, where and why? How can you attract top global talent to stay?

We're proud to share with you the newest edition of the world's largest survey on work and mobility preferences, delivering global scale data with local depth. As part of the Global Talent Survey series (ongoing since 2014), the current report explores the ever-changing preferences of where and how people around the world want to work.

We present this to you as part of our ongoing commitment as your **No.1 Trusted Talent Partner in Asia**. These results have deep actionable insights for your market that will enable you to better connect jobseekers and make **#BetterMatches.**

How these findings help you:

- Discover the motivations and profiles of workers that are ready to move to your country for work
- Understand what motivates talent when choosing a foreign country or employer
- Know what you need to offer to attract highly-skilled talents from abroad

Disclaimer: In this report, there will be instances where percentages will not add up to, or exceed, 100%. This is a result of rounding of numeral fractions.

Presented by:

jobstreet jobsdb by seek

In partnership with:

BCG BOSTON CONSULTING GROUP THE NETWORK Global talent simplified



Source: 2023 BCG/The Network/Stepstone Group proprietary web survey and analysis.

About the study

Jobstreet and Jobsdb are the leading employment platforms in Southeast Asia, helping people live more fulfilling and productive working lives and helping organisations succeed. They are a subsidiary of SEEK, a diverse group of companies comprised of a strong portfolio of online employment, educational, commercial and volunteer businesses. SEEK is listed on the Australian Securities Exchange and has a strong presence across the APAC region, including six Asian markets – Hong Kong, Indonesia, Malaysia, the Philippines, Singapore, and Thailand – through the Jobstreet and Jobsdb brands. SEEK attracts over 500 million visits a year in Asia.

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. Today, it helps clients with total transformation—inspiring complex change, enabling organisations to grow, building competitive advantage, and driving bottom-line impact.

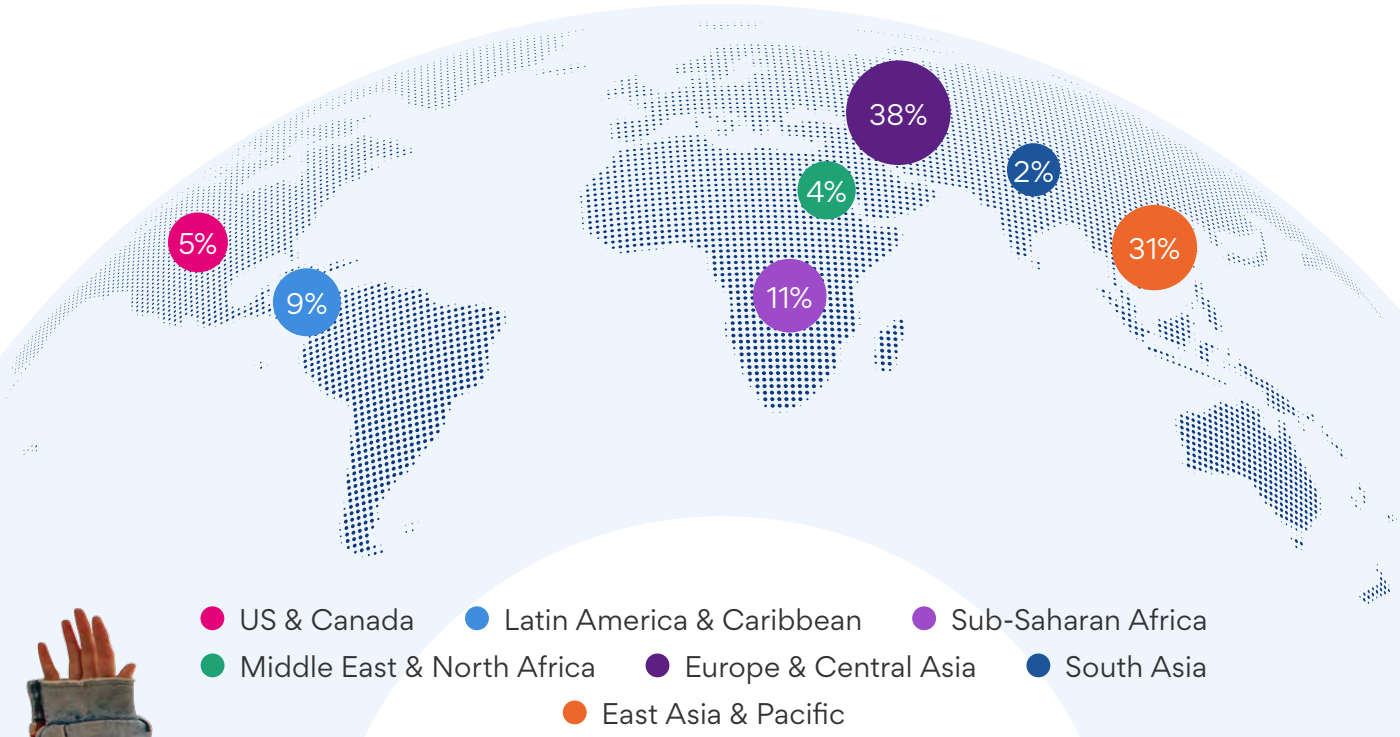
The Network is a global alliance of more than 60 leading recruitment websites, committed to finding the best talent in over 130 countries. Founded in 2002, The Network has become the global leader in online recruitment, serving more than 2,000 global corporations. It offers these corporations a single point of contact in their home countries, and allow them to work in a single currency and with a single contract—while giving them access to a global workforce. The recruitment websites in The Network attract almost 200 million unique visitors each month. For more information, please visit www.the-network.com.

Demographics: Global

150,735
respondents

180+
countries

The global results are based on a large, diverse sample covering most major talent markets.





Source: 2023 BCG/The Network/Stepstone Group proprietary web survey and analysis.

Demographics: Global

Global Workforce participants

150,735

Gender



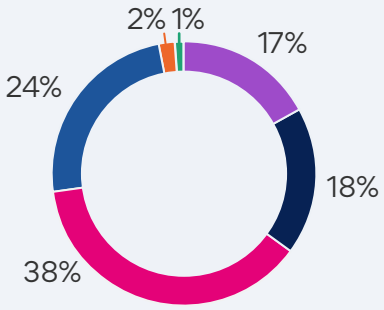
- Male
- Female
- Prefer not to say

Living situations



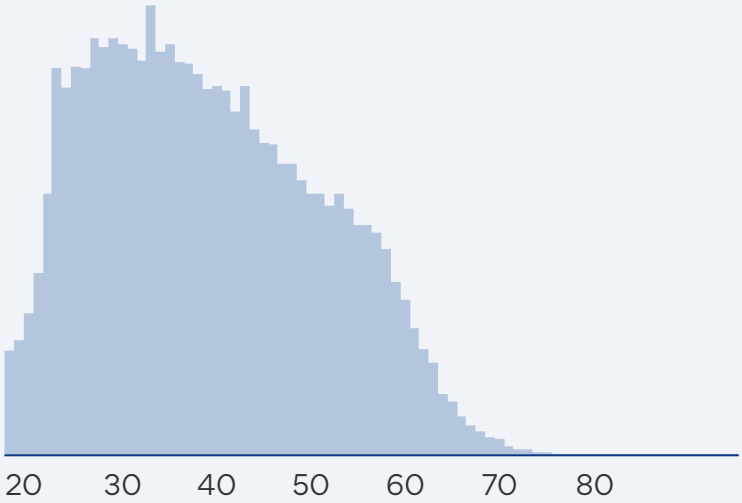
- Living in country of origin
- Not living in country of origin

Education

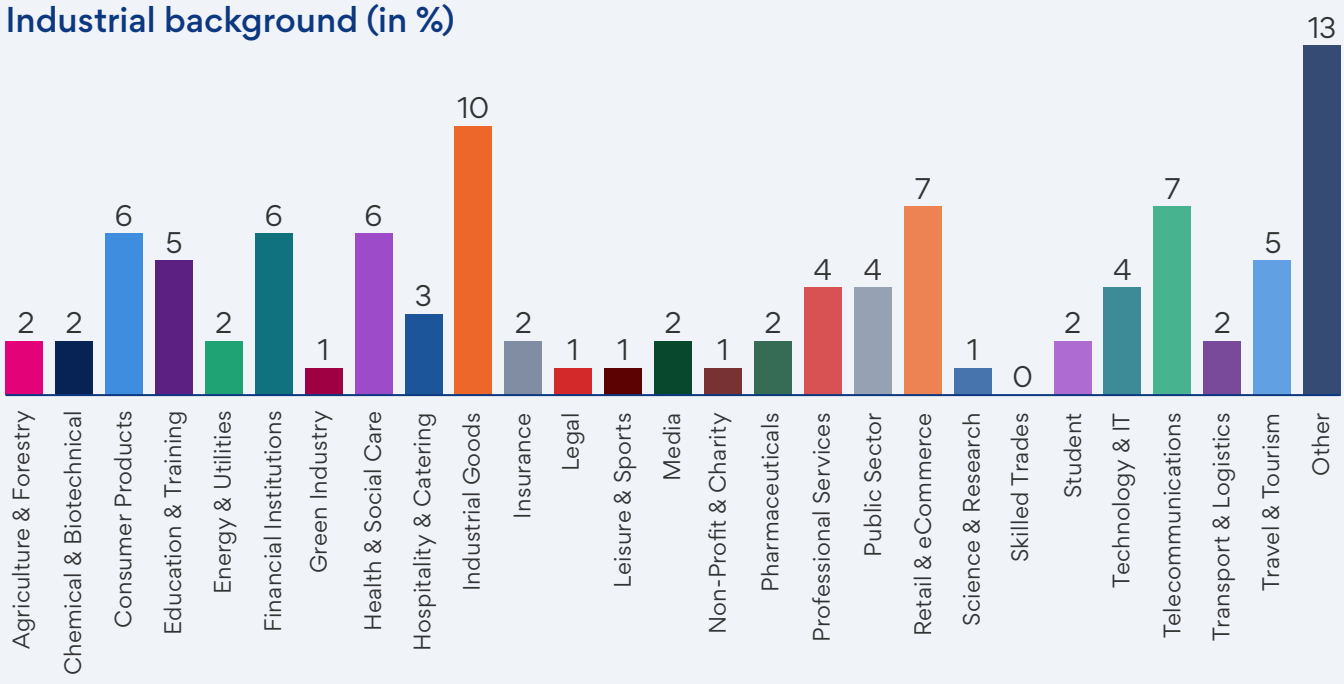


- No formal education
- High school
- Secondary qualification
- Bachelor
- Master/Diploma
- Doctorate/PhD/MD

Age distribution



Industrial background (in %)



Source: 2023 BCG/The Network/Stepstone Group proprietary web survey and analysis.

Demographics: The Philippines

Workforce participants in the Philippines

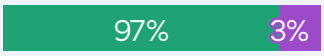
6,498

Gender



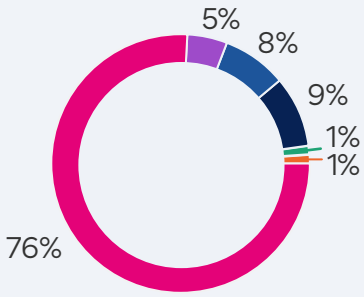
- Male
- Female
- Prefer not to say

Living situations



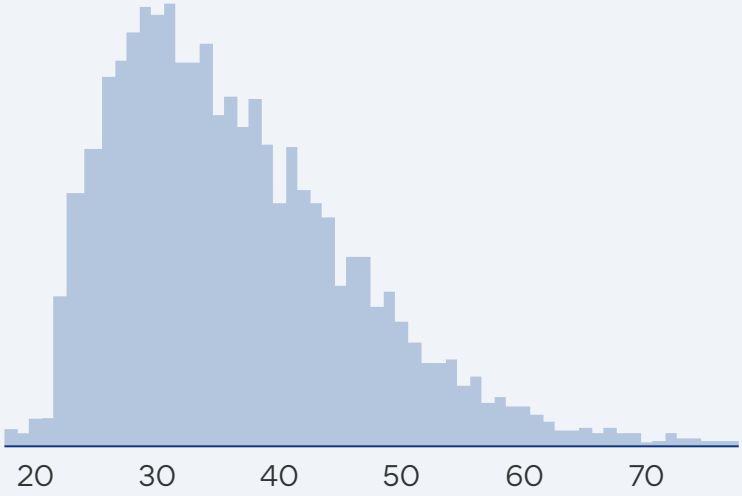
- Living in country of origin
- Not living in country of origin

Education

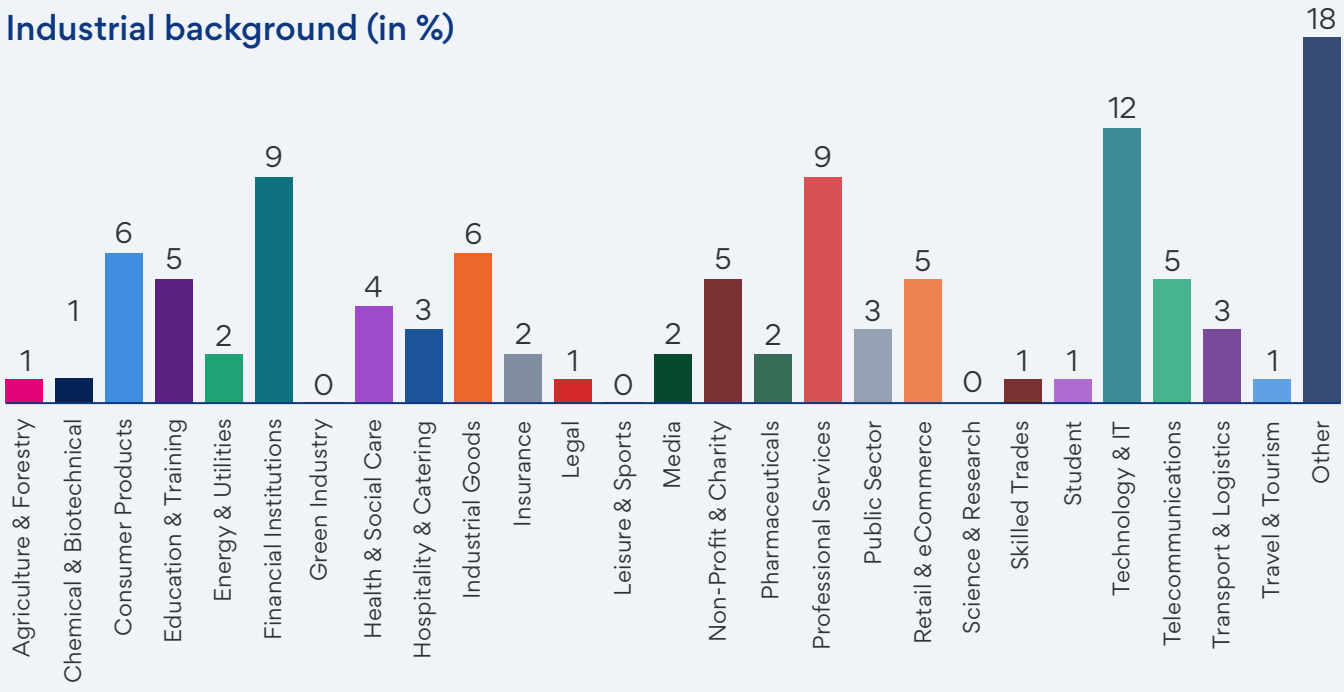


- No formal education
- High school
- Secondary qualification
- Bachelor
- Master/Diploma
- Doctorate/PhD/MD

Age distribution



Industrial background (in %)



Source: 2023 BCG/The Network/Stepstone Group proprietary web survey and analysis.

Global Mobility Trends

This section will address the following global mobility questions based on 150,735 respondents sourced worldwide from more than 180 countries:

1. How willing are people to move abroad for work?
2. What factors influence their willingness to move?
3. Which country would they consider moving abroad to work in?
4. Which city would they consider moving abroad to work in?



Key Insights: Global

Talent mobility is a major force for innovation and progress, yet also a very personal choice for workers. Our global survey of **150,000 respondents from over 180 countries** attempts to understand these choices better.

63% of workers are willing to relocate for work

Talent mobility is a critical lever to fill skill gaps in many economies. Some insights:

- 63% of workers are open to relocate for their careers, compared to 71% pre-COVID
- 25% of workers are actively looking for jobs abroad
- 66% of workers are interested to work remotely for companies based in other countries without relocating, indicating high virtual mobility

Respondents from economies with high unemployment or lower level of economic development are especially mobile. Young, highly-skilled people are also particularly open to relocate.

Australia leads Top 10 list of most desirable destinations to work

When asked, respondents prioritised major English-speaking economies, just like in 2020. Australia took the lead for 2024, followed by US, Canada and UK. The top 10 list also features key European destinations (Germany, France, Spain, Switzerland) and two Asian countries (Singapore, Japan). Additionally, London continues to maintain its winning streak as a top city since 2014. Rounding out the Top 5 cities are Amsterdam, Abu Dhabi, Dubai and New York.



Source: 2023 BCG/The Network/
Stepstone Group proprietary web survey and analysis.

Key Insights: Global

People choose countries for job opportunities and quality of life – and prefer employers who offer support

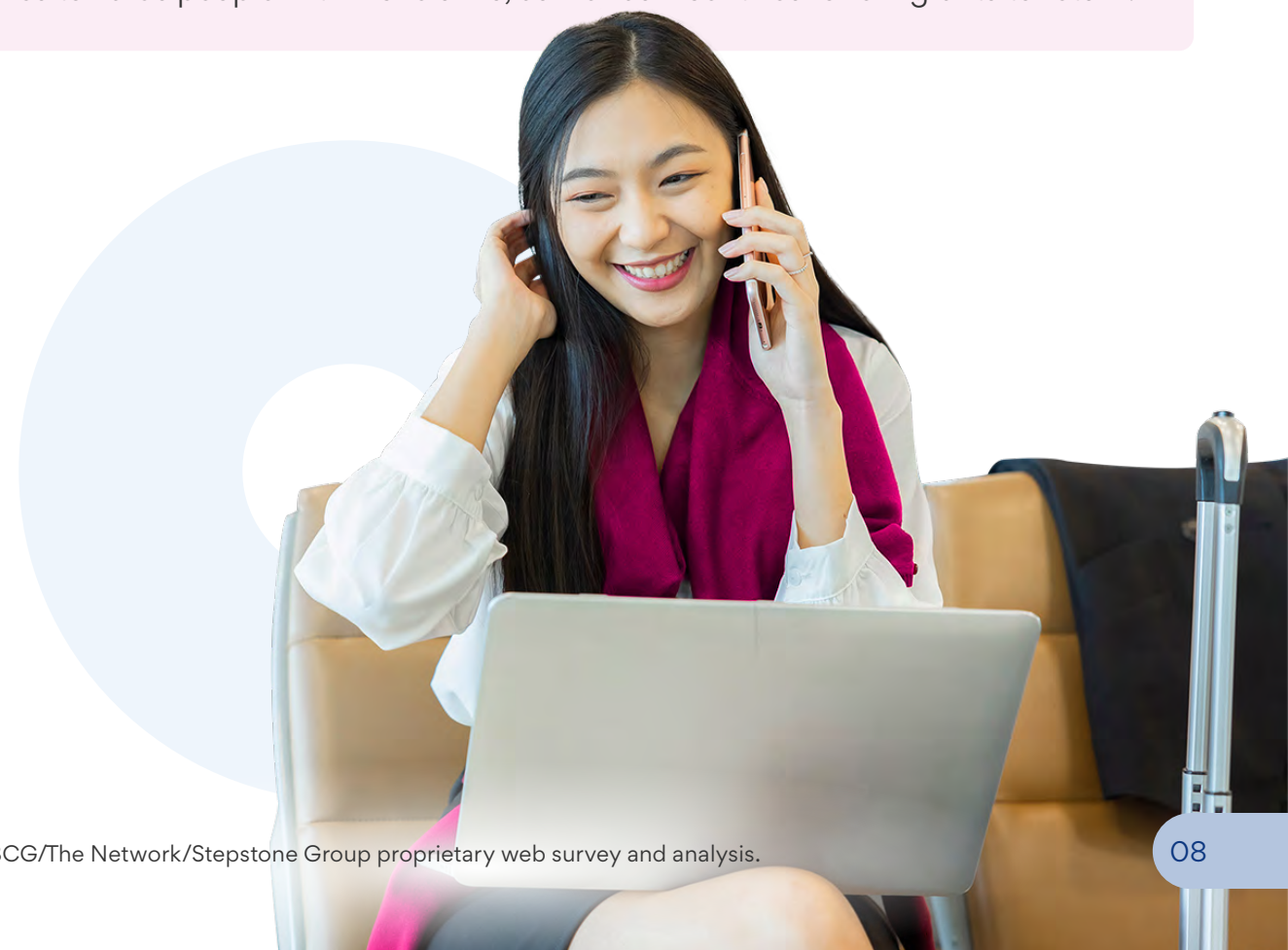
Respondents were quite homogeneous regarding the main reasons why they picked a country:

- hoping for better job opportunities
- higher quality of life
- higher income

Other practical considerations include whether they speak the local language or have contacts in the country. When it comes to choosing foreign employers, jobseekers prefer companies with English as a working language and an inclusive culture. Offering support with regards to visas, relocation, and housing will also make employers stand out in the global talent market.

Governments and employers can benefit from a dynamic, mobile global workforce if they improve recruitment habits

By creating an environment that promotes talent mobility, governments and employers can diversify their workforce with unique skills. Employers can focus on building a comprehensive talent strategy, targeting the right talent hotspots, adjusting their employer value propositions, supporting relocation/visa processes and building an inclusive company culture. Governments may experiment with targeted immigration policies and programmes towards people with niche skills, as well as incentives for emigrants to return.



Source: 2023 BCG/The Network/Stepstone Group proprietary web survey and analysis.

Willingness to work abroad

Would you be willing to move abroad for work?

A large share of respondents are still highly-mobile, with only a slight decrease observed in recent years. However, the decline is more prevalent in European markets. In 2023, the interest in relocating internationally remains below the 71% peak of 2018, potentially due to stricter border controls, changes in immigration policies from key countries, global uncertainty, and a trend towards remote working that eliminates the need for physical moves.



What influences the willingness to move?

Age, education level, gender, industry and occupation makes a major difference. Highly-skilled young people are most likely to be open for relocation.

74% of 20 to 30-year-olds are mobile

67% of those with at least tertiary education are mobile

Most mobile industries

- Agriculture
- Travel and Tourism
- Energy and Utilities
- Science and Research
- Technology and IT

71% of those in managerial roles are mobile

Most mobile occupations

- Engineering and Technical
- Digitalisation, Data Science, AI
- IT
- Design, Art, Creative Professions
- Business Management

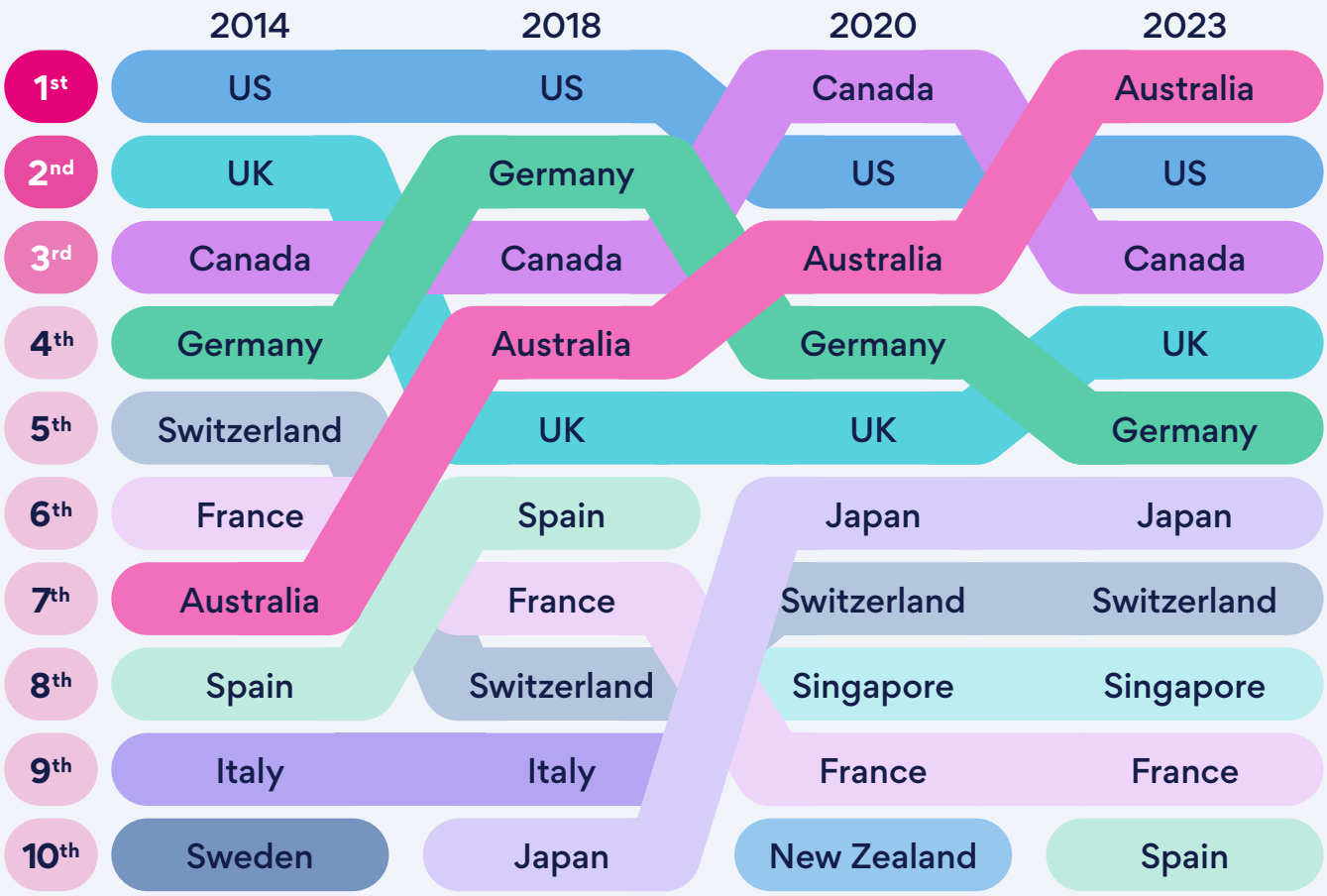
There is change in the calculation of the willingness to move abroad from the previous report, which considered only the talent that said they would absolutely want to move. The new calculation includes the talent that is willing to move if required and the ones already working in the foreign country.

Source: 2023 BCG/The Network/Stepstone Group proprietary web survey and analysis.

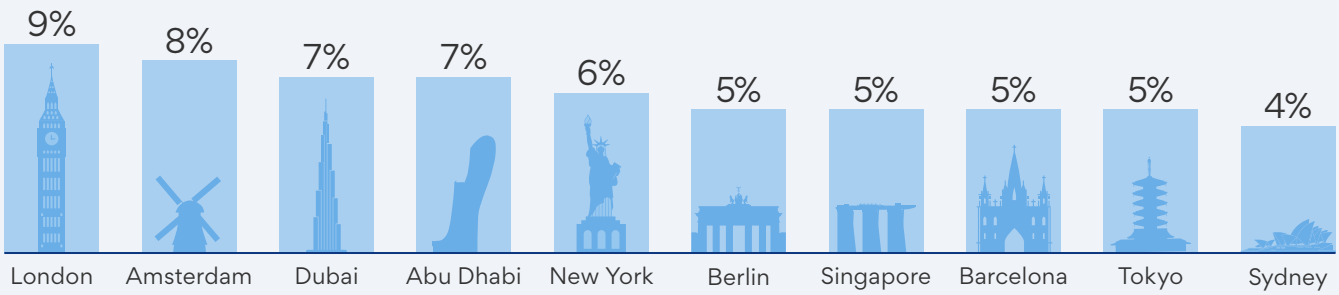
Top destinations

Which country would you consider moving to, for work?

English speaking countries continue to lead the list, with Australia overtaking Canada. Besides several European countries, key Asian destinations such as Japan and Singapore continue to be attractive.



Which city would you consider moving to, for work?



Source: 2023 BCG/The Network/Stepstone Group proprietary web survey and analysis.

The Philippines as a Destination

This section aims to address the following questions regarding the Philippines based on 150,735 respondents worldwide from more than 180 countries:

1. Would people move to the Philippines for work?
2. Why do they choose the Philippines as one of their top destinations to move to?
3. Where are these people who are interested in the Philippines coming from?



The Philippines as a global destination for work

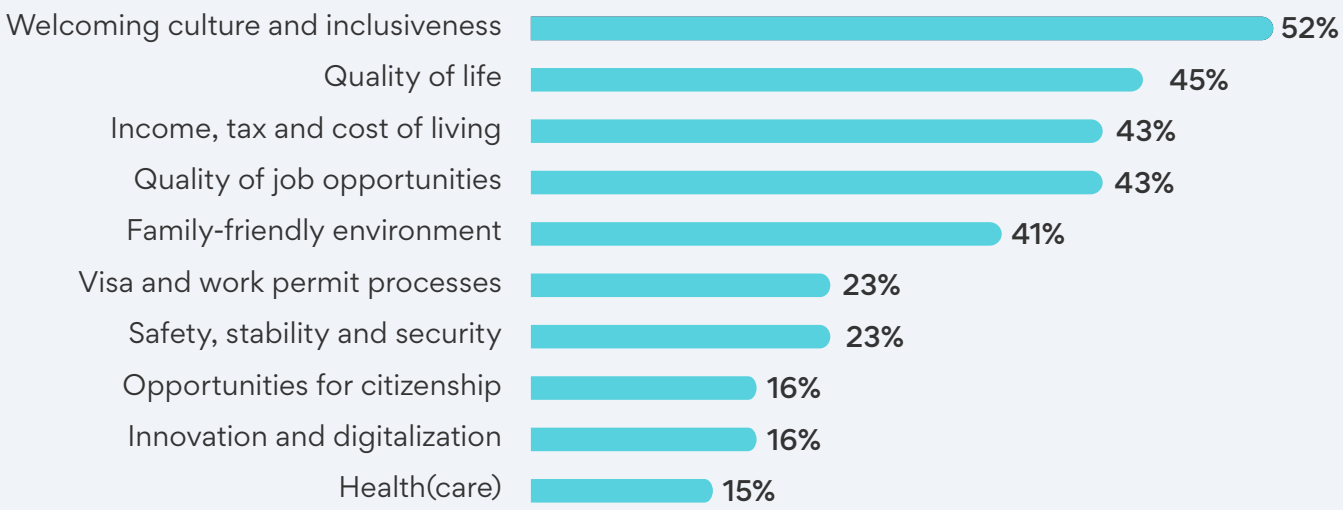
Would you move to the Philippines for work?

The global perception of the Philippines as a place of employment for those seeking opportunities abroad has seen a notable uptick, with its ranking improving by 11 spots since 2020, reaching number 56 in 2023. However, it is still far compared to top global countries, and ranks low within SEA. Most respondents who chose the Philippines did so because of its welcoming culture and inclusiveness and perceived good quality of life (which includes factors like nature and climate as well). Cost of living and quality of job opportunities is also seen favorably.

The Philippines rank



Why did you choose the Philippines as one of your top destinations?



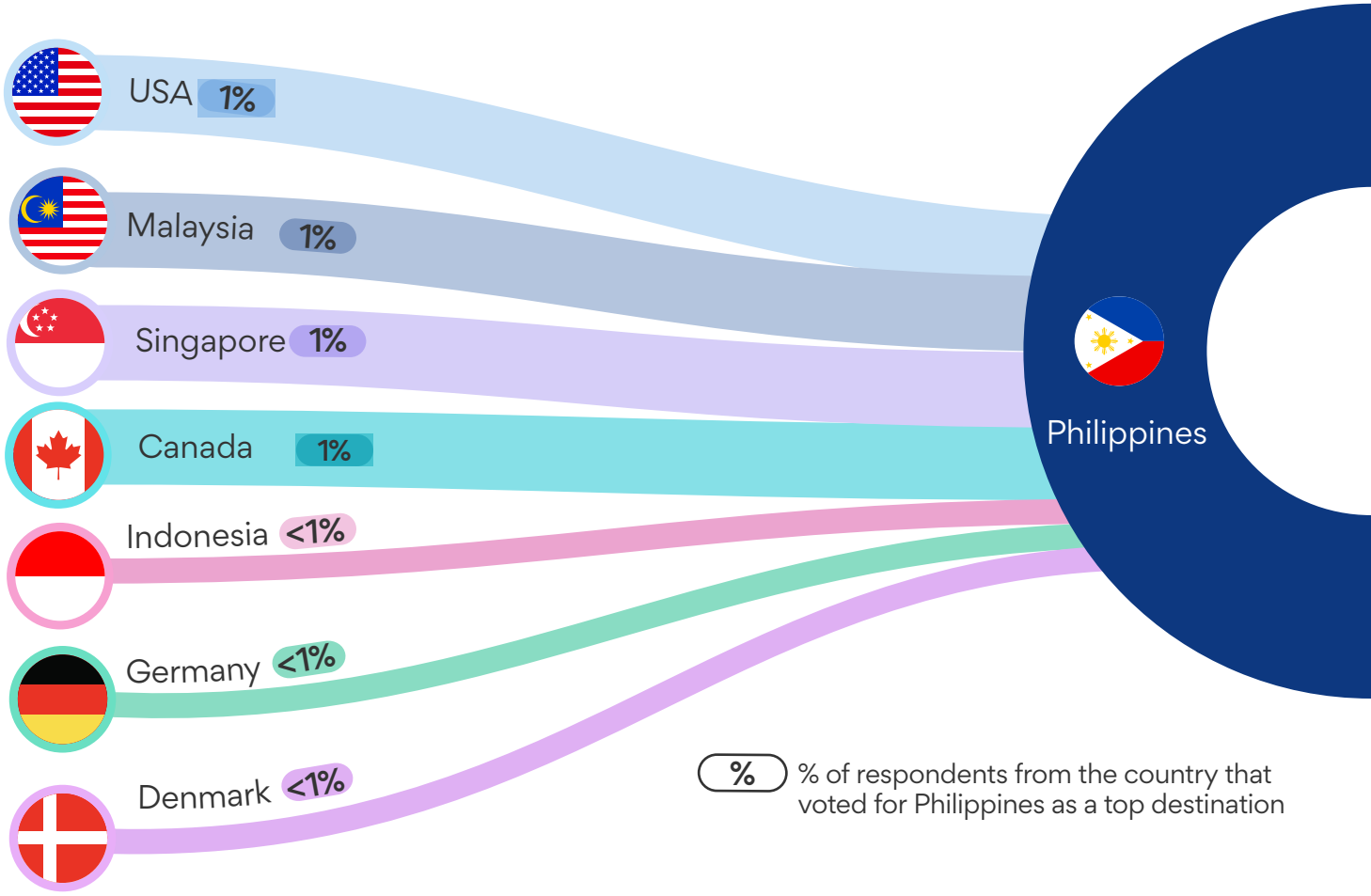
Source: 2023 BCG/The Network/Stepstone Group proprietary web survey and analysis.

Countries who want to move to the Philippines for work

Countries with interest to come to the Philippines

Due to the lower ranking of the Philippines compared to other countries, it is a less popular work destination for talent. However, there is some interest garnered from neighboring countries such as Malaysia, Singapore and Indonesia, as well as English-speaking countries such as USA and Canada.

Note: Since the Philippines overall ranks rather low in the list of countries with few votes, distribution of votes is less representative.



Source: 2023 BCG/The Network/Stepstone Group proprietary web survey and analysis.
Thickness of flows from each country are basis the actual votes for Singapore from respondents from these countries.

Mobility Trends amongst Filipinos

This section aims to address the following questions regarding global mobility based on 6,498 respondents from the Philippines:

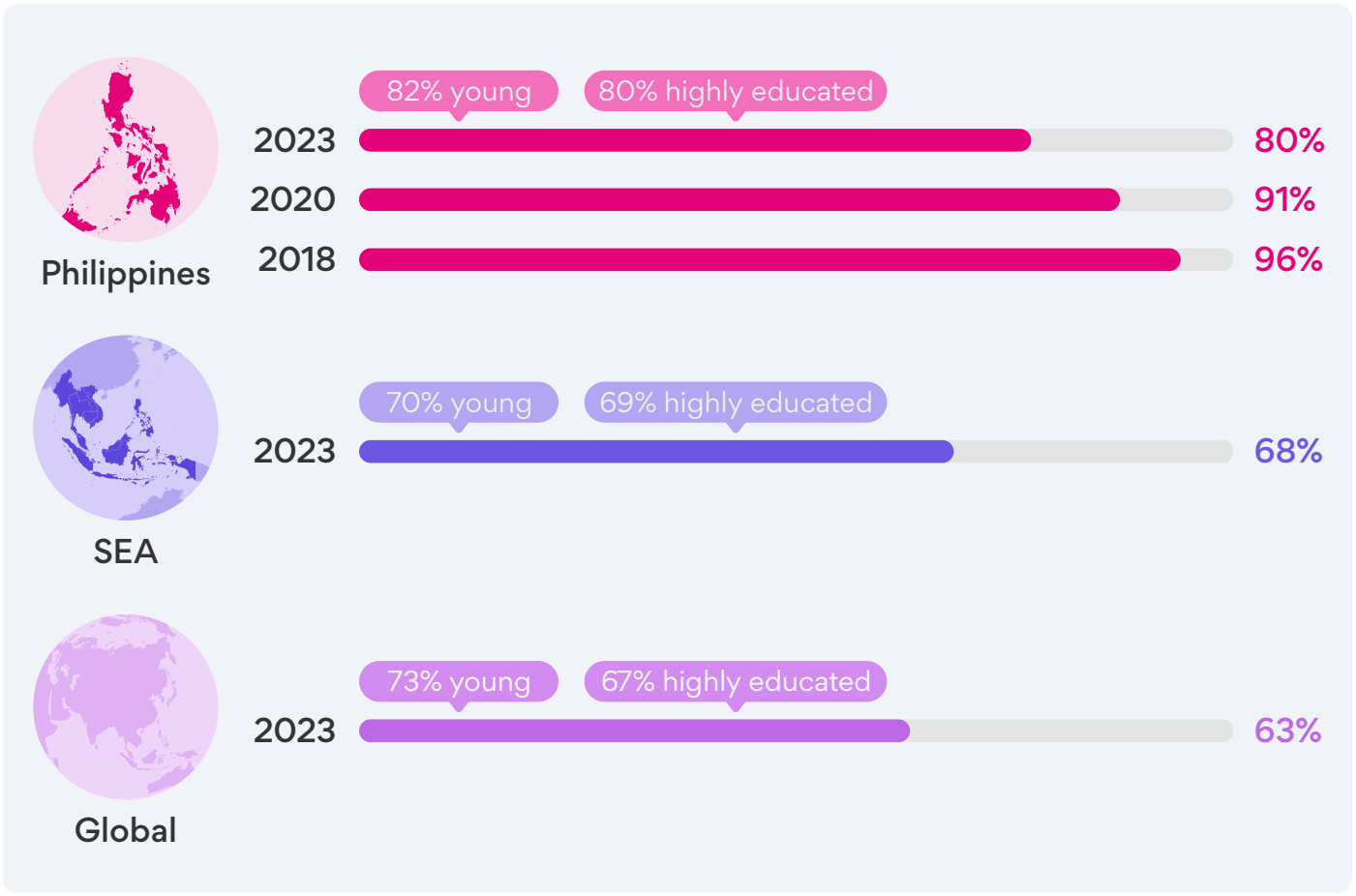
1. How willing are Filipinos to move abroad for work?
2. What are Filipinos' top destinations to move to for work?
3. What influences Filipinos' willingness to move?
4. What influences Filipinos' willingness to stay in the country?
5. What do Filipinos expect from their employers when moving abroad for a job?



Filipino mobility trends

Willingness to work abroad

Talent in the Philippines displays a strong interest to relocate abroad for work, with 80% expressing readiness compared to 68% in the Southeast Asian (SEA) region and 63% globally. Unlike the global trend where younger individuals are more willing to work abroad, Filipinos across various life stages express interest in international relocation. However, while the interest remains high, it has declined significantly between 2018 and 2023.



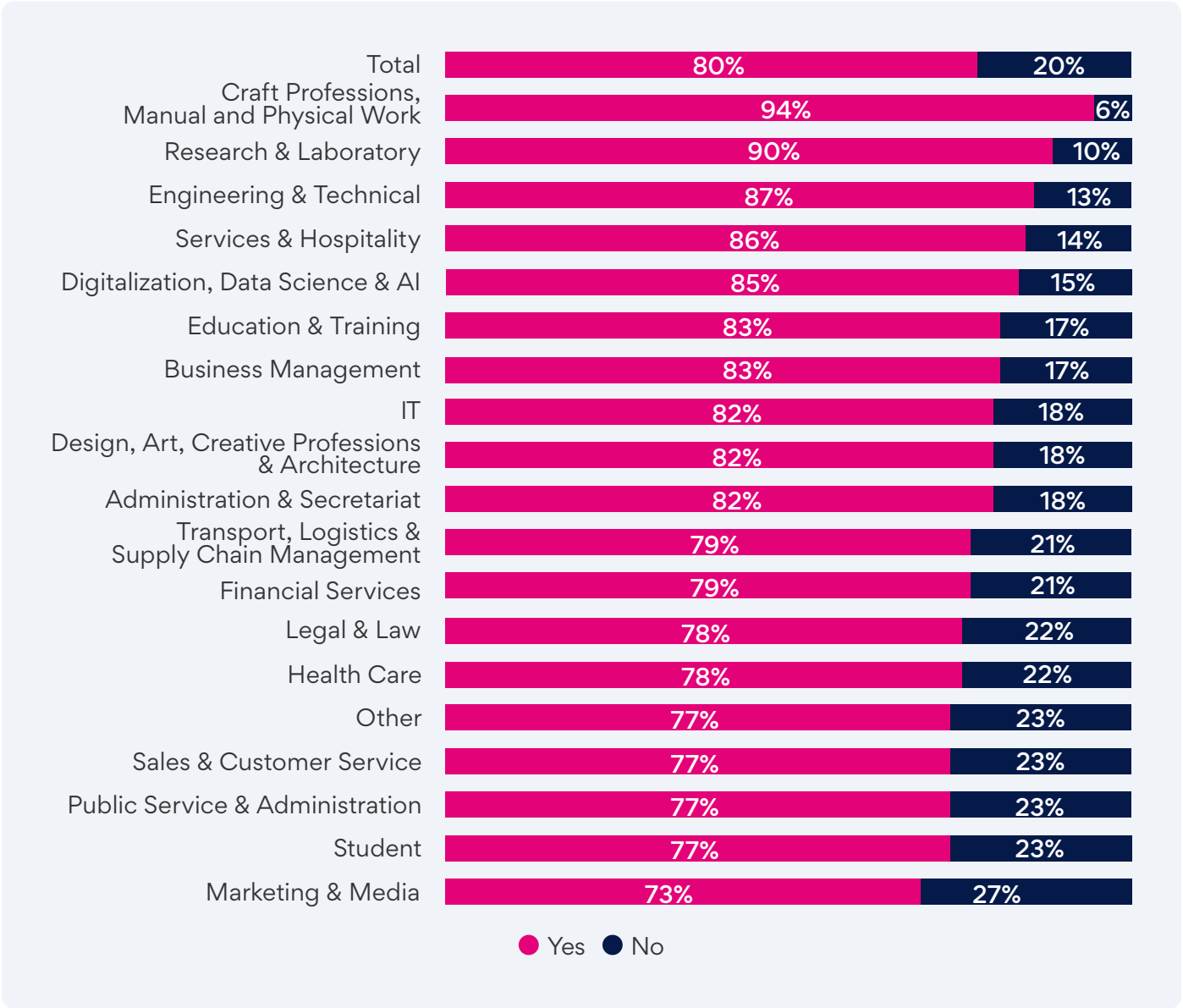
1. Willingness is defined as anyone who is willing to relocate either actively, not actively or only when necessary.
2. Young professionals are all respondents below 30 years of age.
3. Highly educated professionals include Doctorates, PhDs, Masters/Diploma and Bachelor's degree holders.

Source: 2023 BCG/The Network/Stepstone Group proprietary web survey and analysis.

Filipino mobility trends by job role

Willingness to work abroad by job role in the Philippines

The expertise of Filipino employees who are looking to relocate is very diverse, ranging from low to high-skill levels. Almost all workers in the craft professions, as well as manual and physical jobs consider to work abroad. It is followed by other more skillful professions such as research / laboratory, engineering / technical, and services and hospitality. On the other end, marketing and media are the least likely to consider moving abroad, perhaps due to the richmedia culture such as music and content.



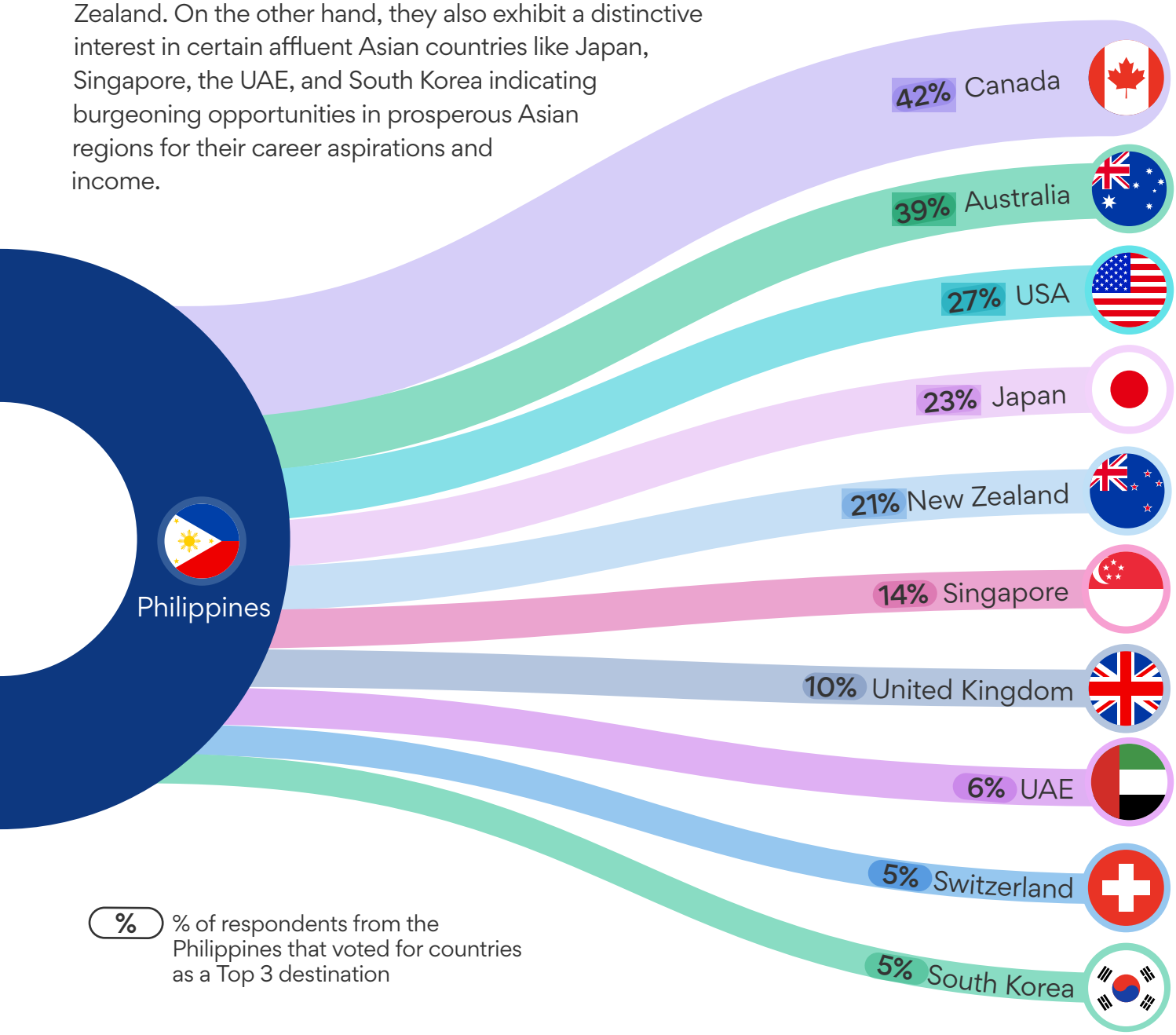
1. Willingness is defined as anyone who is willing to relocate either actively, not actively or only when necessary.

Source: 2023 BCG/The Network/Stepstone Group proprietary web survey and analysis.

The Philippines as source country

Top destinations for respondents in the Philippines

The preferences of the 80% Filipino workers with an interest in international employment reflect a dual inclination. On one hand, there is a strong alignment with global workforce trends, as they favor English-speaking developed nations including Canada, Australia, the USA, and New Zealand. On the other hand, they also exhibit a distinctive interest in certain affluent Asian countries like Japan, Singapore, the UAE, and South Korea indicating burgeoning opportunities in prosperous Asian regions for their career aspirations and income.



% % of respondents from the Philippines that voted for countries as a Top 3 destination

Did you know?

According to the Philippine Statistics Authority, it is estimated that 1.96 million Filipinos work overseas as of Sept '22, around 2% of PH's total population.

Source: 2023 BCG/The Network/Stepstone Group proprietary web survey and analysis.

Desired length of stay abroad

Nature of Filipino overseas employment

Roughly one-third of Filipinos expressed a preference for long-term work abroad without any intention of returning, a notable deviation from the typical trend among most Southeast Asian (SEA) workers, who often favor shorter-term overseas assignments of about three years before returning home. This discrepancy raises concerns about a potential and significant threat of irreversible brain drain for the Philippines. If a substantial portion of the Filipino workforce opts for permanent relocation, it could pose challenges for talent retention and economic development within the country.







	Philippines	SEA	Global
Only temporarily (less than a year)	6%	10%	8%
Short-term (between one to three years)	14%	21%	17%
Medium-term (beyond three years with the intention of returning)	27%	25%	21%
Long-term (indefinite stay planned)	35%	22%	29%
Undecided (depends on my experience abroad)	18%	23%	25%

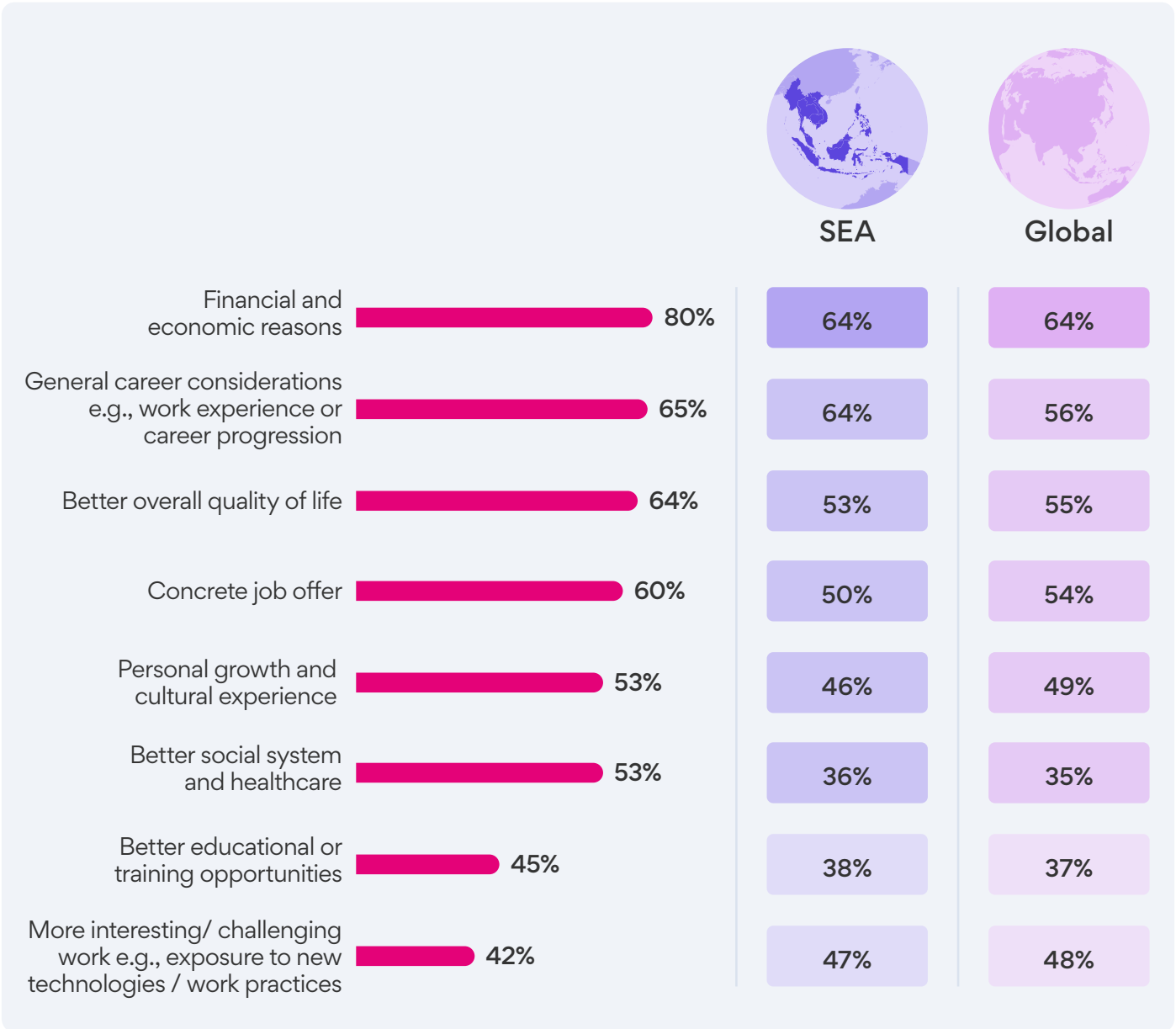


Source: 2023 BCG/The Network/Stepstone Group proprietary web survey and analysis.

Reasons for/against mobility

Reasons to go *(for 80% of respondents who are willing to move)*

Financial motives and career progression rank highly for respondents in the Philippines, just as they do globally. However, compared to the average global worker, Filipinos are more motivated by the search for better social systems and healthcare when thinking of moving abroad.

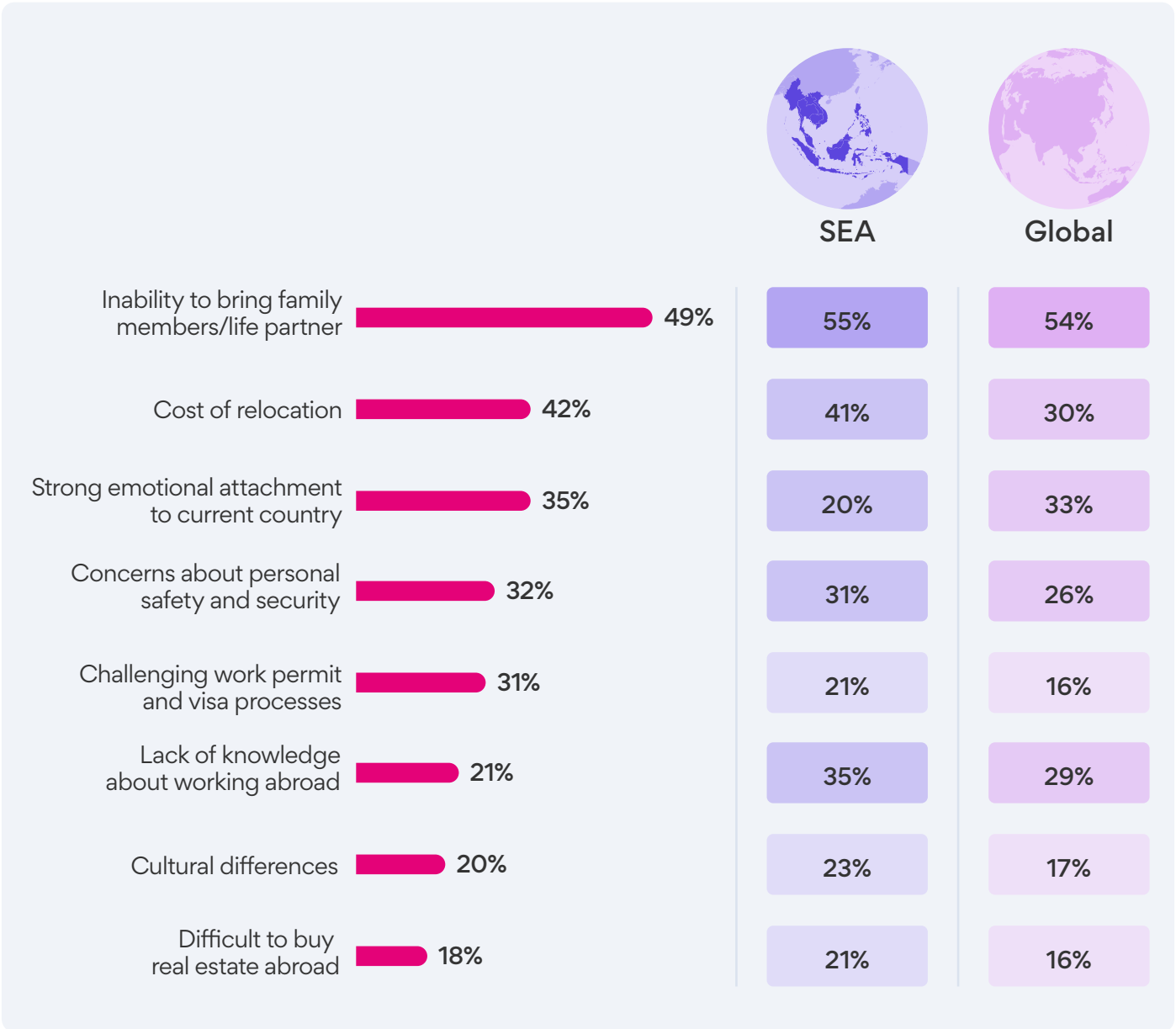


Source: 2023 BCG/The Network/Stepstone Group proprietary web survey and analysis.

Reasons for/against mobility

Reasons to stay *(for 20% of respndents who are NOT willing to move)*

Mirroring global sentiment, about half of respondents in the Philippines decided to stay due to not being able to bring their family abroad. This is followed by practical challenges like cost of relocation. They also have strong emotional attachments with their home country which might potentially weigh in for them to stay back.



Source: 2023 BCG/The Network/Stepstone Group proprietary web survey and analysis.

Expectations from employers

What do jobseekers expect from their employers when moving abroad for a job?

Respondents from the Philippines also express a heightened need for assistance in areas similar to workers from the broader Southeast Asian (SEA) region, although to a significantly greater extent – more than 80% of respondents expect support with visas/work permits, relocation logistics, and housing assistance.







	Philippines	SEA	Global
Visa and work permit assistance	88%	79%	78%
Housing assistance e.g., employer provides accommodation support in finding accommodation	85%	78%	79%
Relocation support e.g., transportation assistance with local services	82%	74%	69%
Structured onboarding and orientation program *prior* to arrival	60%	46%	42%
Language support and training	55%	53%	54%
Structured onboarding and orientation program *after* arrival	54%	44%	44%
Legal and financial advice	54%	42%	44%

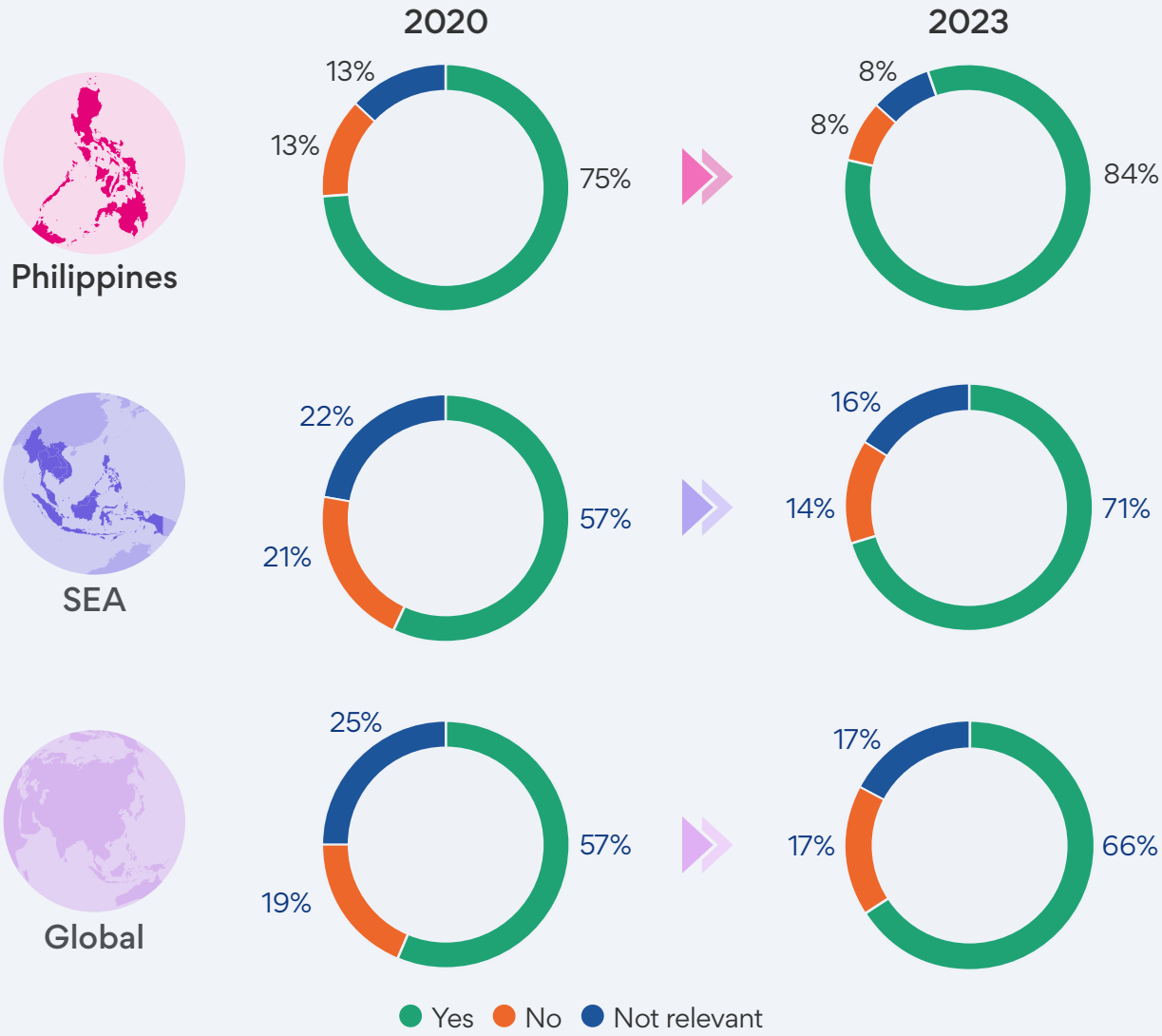
Source: 2023 BCG/The Network/Stepstone Group proprietary web survey and analysis.

Reception on remote work

Would people work abroad for a foreign employer with no physical presence in their country?

Globally, willingness for virtual mobility has seen a strong increase. The same is true for the Philippines. With a substantial increase of 9% from 2020, Filipino professionals are now more eager for remote international work than ever, way above SEA and global averages. This may partially explain the slightly reduced willingness to move: if work comes to the Philippines virtually, there is less need to relocate.

% of workforce willing to work for a foreign employer with no physical presence in the Philippines



Source: 2023 BCG/The Network/Stepstone Group proprietary web survey and analysis.

Conclusion & Way Forward

What can employers in the Philippines do in order to benefit from a global talent pool? What are some thought starters for the government?



Summary: Philippines

Philippines as a destination country: Increase in global ranking due to strong post-pandemic recovery

The Philippines' ascent in the global rankings as a work destination is marked by a notable eleven-spot increase since 2020 to rank 56, signaling its growing appeal to international professionals. Attracting a diverse pool of talent, the country is perceived as offering a welcoming culture and inclusiveness, quality of life and attractive income, tax and cost of living.

Philippines as a source country: Filipino professionals ready to move abroad for good – employers should invest to retain them

Globally, interest in working abroad has slightly decreased and talent from the Philippines also exhibited a similar trend but the interest to work abroad remains very high. Their primary motivation to move abroad includes financial or economic reasons, general career considerations and better overall life quality. Specifically, individuals in fields such as craft professions, manual / physical work, research & laboratory and engineering & technical displayed a higher interest.

The top destinations that Filipino talent are considering are English-speaking developed nations such as Canada, Australia and the USA. The majority are primarily interested in long-term or medium-term mobility. They would require considerable support from their future employers in areas such as visa/permit, housing assistance and relocation support to ease the challenges of working and adapting to a new culture overseas.

On the other hand, there are also opportunities to retain Filipino talent in the country as they are more open to working remotely for foreign employers in their own country today compared to 2020 - a trend that is in line with global and SEA trends.

1. Throughout the document, SEA countries include respondents from Malaysia, Singapore, Thailand, The Philippines, Hong Kong and Indonesia.
2. Allen & Gledhill Publications.
3. Asia - HRD
4. Asia - HRD

Source: 2023 BCG/The Network/Stepstone Group proprietary web survey and analysis.

Recommendations for Filipino employers

Develop a global talent strategy

Planning

To prepare for imbalances in talent supply and demand, all employers can **practice strategic workforce planning** (forecasting needed profiles and capacities). The Philippines has a relatively large population and many of them are looking to work abroad. Therefore, Filipino employers may experience **talent shortages in the future.** To retain top talent in the country, companies can start by **providing better compensations / benefits and better careers** as these are the top reasons that they want to work abroad (For more information on the types of compensation and benefits to offer, feel free to look at our Hiring, Compensation and Benefits report). Alternatively, Filipino employers can also consider **attracting the working population from other countries.**

Attraction & Recruitment

To attract talent from abroad, employers in the Philippines should revisit their **employee value proposition**, focusing on aspects that make the Philippines stand out. Examples of these are:

- welcoming culture
- quality of life
- low cost of living

They can also consider **partnering with recruitment platforms (such as SEEK) to post jobs across the whole SEA region.** In a world with high willingness to move abroad (or to work virtually for a foreign employer), job search should **expand across borders.**

Relocation & Onboarding

Filipino employers could ensure they provide the support that mobile workers in SEA most appreciate: **assistance with visa, housing, and relocation.** This does not mean funding all costs for the candidate, but the key would be helping them to navigate through the required processes. Arriving to a new country also requires more support in the first months, which could be provided in the form of a structured **onboarding process** as well as special **buddy programs** (e.g., partnering newcomers with foreign colleagues who have been in the country for a while).

Integration & Retention

Finally, to unleash the power of a diverse workforce, it is critical to build an **inclusive workplace that does not differentiate based on origin.** One of the first requirements is to shift towards **English as the official working language** of the company. The Philippines is already in a good position regarding this aspect.

Other interventions may focus on building a **culture of diversity,** such as establishing cross-cultural teams, training managers on unconscious bias, or ensuring customs and habits of different nations are respected in the company.

Source: 2023 BCG/The Network/Stepstone Group proprietary web survey and analysis.

Shift the hiring paradigm

Most **Filipinos** prefer to work in hybrid settings, but 38% could imagine going back to the office full time. When it comes to working time, they are in line with global results, preferring a traditional 5-day workweek.

Reach Out to Talent Proactively

With increasing competition to hire the best talent, reach out to them before your competitors do. Contact talents with the right skillsets directly in our talent database with Talent Search.

Focus on Employer Branding

The job market recovery is a great opportunity to improve your branding. Apart from remuneration, values like diversity & inclusion and environmental responsibility are crucial too. Portray your company's values every time you hire with Branded and Premium Ad.



Source: 2023 BCG/The Network/Stepstone Group proprietary web survey and analysis.

Continue your journey with a Trusted Talent Partner

With the global crisis still resolving, our continuing research is part of our commitment in providing actionable insights for employers to navigate the supply and demand of the the Philippines job market. As the region's **No. 1 career partner**, we have the right tools to connect jobseekers to jobs faster and easier. As of Q3-2023, Jobstreet by SEEK has:

A talent pool of **11.4 million**, one of the largest in the Philippines

#1 top of mind, usage and placement among talent

1st choice among jobseekers in the Philippines, most searched for career partner

Over **86.1 million** page views

20 minutes – average time spent per unique visitor on website

* Source: SEEK Asia Job Advertisement Metrics



Source: 2023 BCG/The Network/Stepstone Group proprietary web survey and analysis.

jobstreet by seek

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Hong Kong Thailand

*Reports for other countries might not be ready at the time of publishing, please refer to your account manager.