

DECODING GLOBAL TALENT 2024

Dream Destinations and Mobility Trends

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What a study of 150,000 people in 188 countries tells us about where people will move for work—and why.



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Global talent simplified



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Dream Destinations and Mobility Trends

This is the first report in a series analyzing the work preferences of global talent in 2024.

Ten years ago, we launched the *Decoding Global Talent* series of reports, excited to watch trends in the wide world of work. We never imagined how powerfully and rapidly various global forces—the pandemic, remote work, geopolitics, GenAI, and more—would disrupt the way we work. Nevertheless, the turmoil of the past decade has had little impact on the enduring appeal of talent mobility.

Take Anne Granelli, for example. We first interviewed her in 2014, when Anne, a biomedical researcher and native of Sweden, was living and working in New Delhi with her family after a stint in Canada. “We really like the international atmosphere,” she shared then. “It’s a great opportunity to get different views and learn a lot.” We’ve continued to follow her story. Now 53, she is living and working in Dubai for a US-based medtech company. She recently observed, “Life is too short not to explore all the options.”

The options to work abroad are plentiful. And they offer wins for workers, including the 150,000 we surveyed for this year’s report, and for destination countries, origin countries, and employers:

- **People Who Move Abroad for Work.** Mobile job seekers anticipate higher salaries and a better quality of life, and their choice typically pays off: on average, they report that their quality of life is 9% better after their move, according to the Migration Policy Institute.
- **Destination Countries.** Cross-border migration improves productivity and fills workforce gaps, of which there are many. Already, demand for talent outpaces supply in the US and Germany by 2.74 million and 545,000, respectively, according to recent analysis by The Stepstone Group. These countries could be harbingers of the workplace future in many places around the world. That’s a painfully expensive prospect: a BCG study of 30 countries found that above-average labor shortages currently cost economies more than **\$1 trillion a year**.
- **Origin Countries.** The notion that origin countries can benefit from the departure of talent might seem counterintuitive, since, from one point of view, they are experiencing “brain drain.” But conversely, the Center for Global Development reports “brain gain” related to the fact that departures can promote the dissemination of knowledge and technologies in origin countries and can help those countries connect more firmly to the aggregate global brain. Another benefit: in 2023, according to the World Bank, emigrants sent \$669 billion back to friends and family in their homelands, reducing poverty, increasing consumption, and improving economic stability.
- **Employers.** An overwhelming **92%** of the leaders of global employers say that attracting and retaining talent is among their top three priorities. A recent study by The Stepstone Group in the US, the UK, and Germany found that two-thirds of senior leaders see cross-border migration as a way to solve demographic-driven labor challenges. And employing foreign workers doesn’t just fill capacity gaps: companies with greater global diversity are more innovative and successful. They generate higher profits and are 75% more likely to be world-class innovators, as a [recent BCG analysis](#) showed.

To reap these rewards, however, companies must understand the shifting preferences of mobile workers. This entails answering several key questions:

- Why are they more or less willing to move and work abroad, if at all?
- How have their motivations to move to specific countries changed?
- How have the top target destinations shifted?
- What can future employers and the governments of destination countries do to court global talent?

Our current study of the global workforce provides data-driven answers to these questions. The *Decoding Global Talent* series is a collaboration of BCG, The Network (as well as its partners in more than 150 countries), and The Stepstone Group. It is the largest data source on the mobility preferences of workers globally. Our cumulative data set comprises almost 900,000 responses on where and how people want to work around the world. This year's edition features insights from 150,735 survey respondents in 188 countries, as well as insights from the stories of several individuals we interviewed. (See [Exhibit 1](#) and the sidebar "Methodology.")

Key Findings



Despite geopolitical challenges and emerging virtual mobility, moving abroad for work remains a dream for many workers. Younger people and people from countries with fast-growing populations are the most mobile.



People move abroad primarily for professional and financial reasons. Benefits and services offered by the destination country are secondary factors.



English-speaking countries with strong economies continue to lead the list of top destinations. Survey participants tend to choose these primarily because of the quality of job opportunities offered.

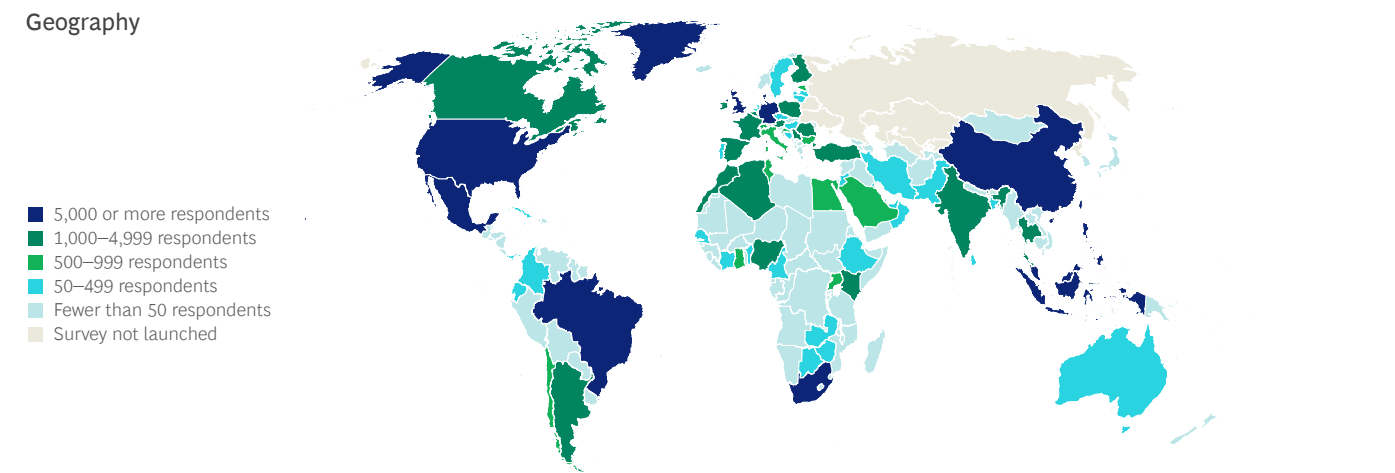
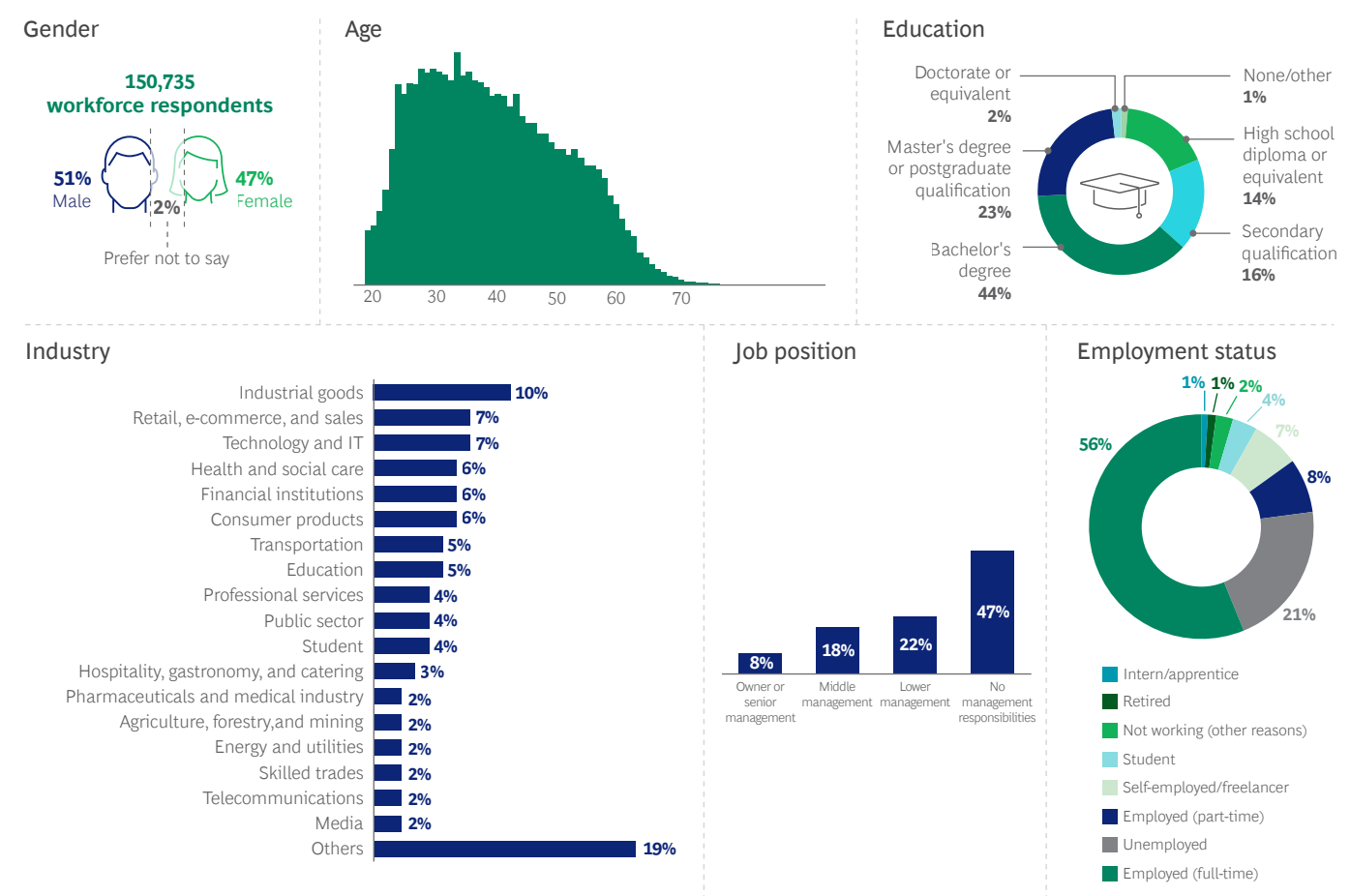


People who move abroad expect employers to take the lead in supporting their relocation and onboarding and to cultivate an international, inclusive culture.



To tap into a valuable pool of global talent—and to gain a decisive competitive advantage in the fast-transforming world of work—governments and employers should devise a comprehensive strategy focused on attracting, relocating, and integrating workers from abroad.

Exhibit 1 - A Survey of 150,735 Workforce Respondents in 188 Countries



	North America	Latin America and Caribbean	Middle East and North Africa	Sub-Saharan Africa	Europe	East Asia and Pacific	South Asia
5,000 or more respondents	US	Brazil, Mexico		South Africa	Denmark, Germany, UK	China, Indonesia, Malaysia, Philippines	
1,000–4,999 respondents	Canada	Argentina	Algeria, Morocco	Kenya, Nigeria	Austria, Belgium, Finland, France, Ireland, Poland, Romania, Serbia, Spain, Turkey	Singapore, Thailand	India
500–999 respondents		Chile	Egypt, Saudi Arabia, Tunisia	Ghana, Uganda	Bulgaria, Estonia, Italy, Slovenia, Switzerland		
50–499 respondents		Colombia, Ecuador, Jamaica, Panama	Iran, Jordan, Kuwait, Lebanon, Oman, Qatar, United Arab Emirates	Benin, Botswana, Cameroon, Côte D'Ivoire, Ethiopia, Senegal, Zambia, Zimbabwe	Bosnia and Herzegovina, Czech Republic, Hungary, Latvia, Lithuania, Luxembourg, Netherlands, Portugal, Sweden	Australia	Bangladesh, Pakistan, Sri Lanka
Fewer than 50 respondents		Other Latin America and Caribbean	Other Middle East and North Africa	Other sub-Saharan Africa	Other Europe	Other East Asia and Pacific	Other South Asia

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

Note: In the industry distribution, “others” includes insurance, chemical and biotech, legal, travel and tourism, and other categories not ranked in the top 18 industries by number of respondents.

Methodology

Sample Size. BCG, The Network (together with its affiliate organizations), and The Stepstone Group conducted this anonymous, online survey from October through December 2023. All told, 150,735 people in 188 countries participated. The sample includes 51% men and 49% women, most of whom work in commercial industries. (The public sector and nonprofits are also represented.) Most respondents are at an early stage of their career or in mid-career, and the majority are 20 to 40 years of age. Almost three-quarters of them have a bachelor's degree or above.

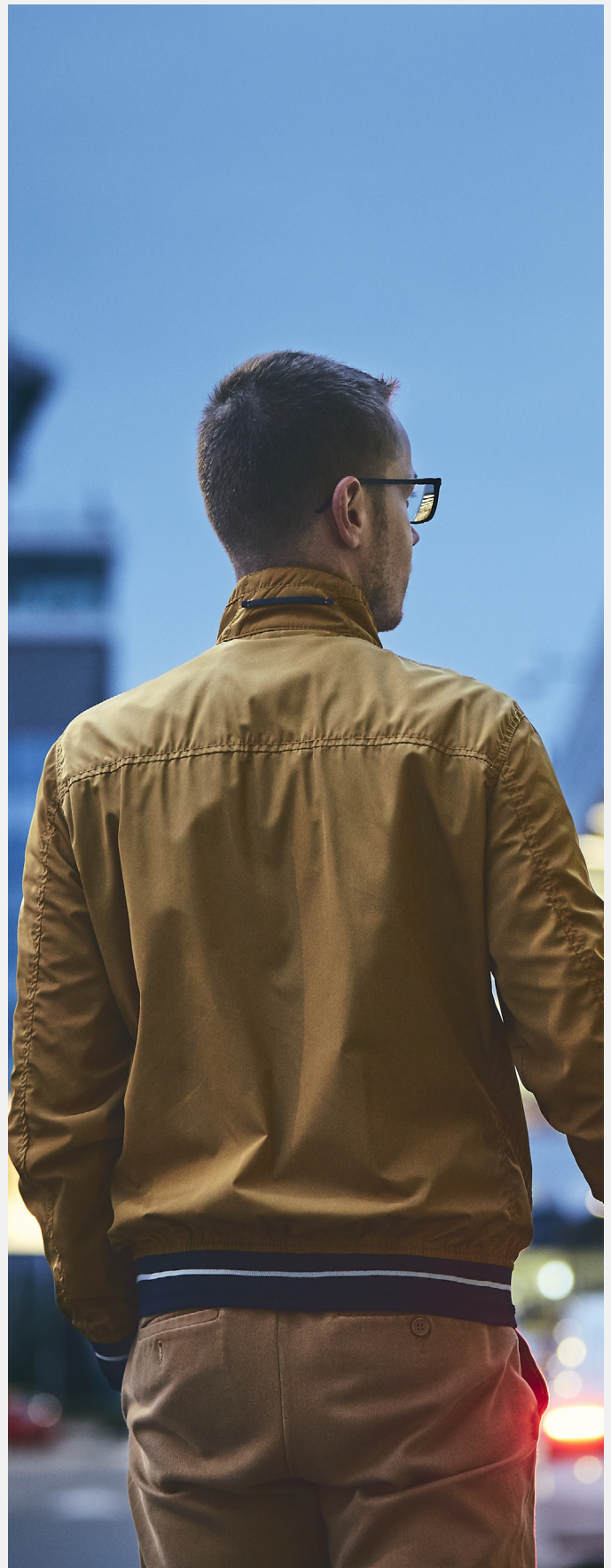
Topics Covered. The survey elicited workers' attitudes on various topics, including their willingness to move abroad for work, the countries they would most like to work in, their reasons for choosing those countries, and their expectations of their future employers in a new country. The data gathered in the survey (including a wide range of information on participants' demographic and professional backgrounds) made it possible to analyze workers' attitudes on the basis of multiple parameters.

Methodology Updates. This year's edition features a few methodological changes and updates in comparison to our 2021 report. When it was relevant to do so, we retrospectively adjusted previous results shown in this report to ensure comparability.

First, we included a deep dive into the main reasons why people choose a specific country. We asked respondents to evaluate their top three destinations based on a list of factors inspired by the Organisation for Economic Co-operation and Development's 2023 edition of the *Indicators of Talent Attractiveness* report. We used this report, which scores countries' attractiveness to skilled talent across multiple dimensions, as a starting point for defining the ten key factors assessed in our study.

Second, we adjusted the methodology for calculating willingness to move abroad for work. In the 2014, 2018, and 2021 editions of our report, we did not include respondents who selected "Yes, I'm willing to move abroad but only if absolutely necessary" in the percentage classified as "willing to work abroad." For the sake of transparency, we have decided to include these, in order to show the full picture of respondents' varying levels of motivation. Furthermore, past editions included all respondents who were then working abroad in the "willing to work abroad" percentage. In this edition, we have refined this measure to include only those who clearly indicated a willingness to move abroad *again*.

Interviews with Global Talent. BCG also conducted follow-up video interviews with select study participants around the world—many of whom we have interviewed before and have followed for several years. Those interviews are the source of the direct quotes that appear in this report.





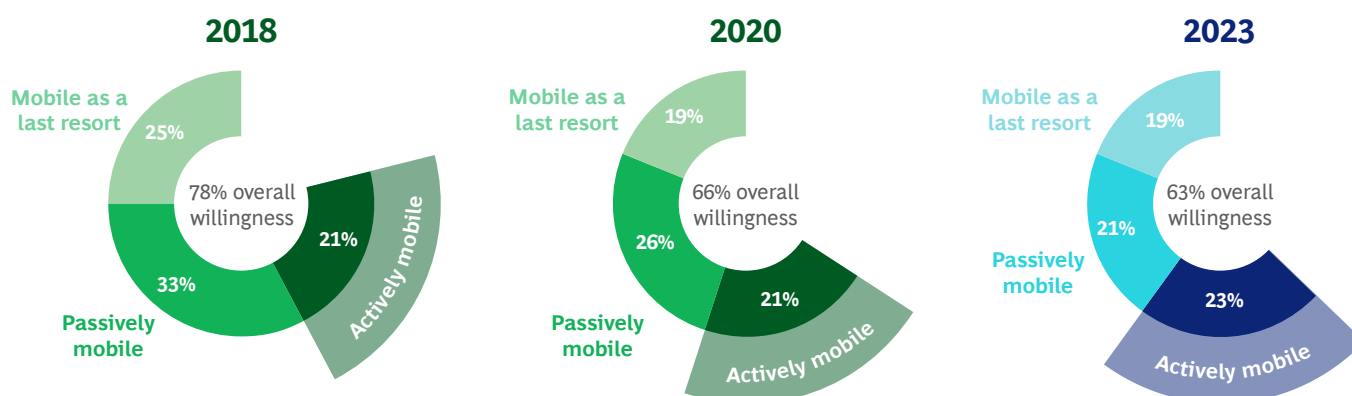
Up to
800 million:

professionals around the world who may
be actively looking for jobs abroad

This estimate is based on our finding that 23% of our survey respondents are actively mobile and on the size of the active labor force around the world: 3.55 billion, according to the World Bank.

Exhibit 2 - One in Four Professionals Actively Seek Jobs Abroad

Respondents who said that they would be willing to move abroad for work, and how (%)



Sources: 2018, 2020, and 2023 BCG/The Network/The Stepstone Group proprietary web surveys and analysis.

Note: Based on responses to the question, “To what extent are you willing to work abroad?” The distribution of responses by category is as follows: actively mobile, “Yes, I’m willing and actively looking to relocate”; passively mobile, “Yes, I’m willing but not actively looking to relocate”; mobile as last resort, “Yes, I’m willing, but only if absolutely necessary.”

What Makes People Want to Move?

Although the past few years have been tumultuous, a growing (albeit slight) share of respondents are actively looking for jobs abroad: 23% in 2023 compared with 21% in previous years. (See Exhibit 2.) They constitute the “actively mobile” talent group, this report’s main focus of analysis. Manuel Milliery, a 35-year-old originally from Lebanon and now a Paris-based entrepreneur specializing in sustainability, is one of them. “The world is so big, so full of opportunities,” he observed.

Other segments of our survey population qualify as “passively mobile” (willing but not actively looking to relocate) or “mobile as a last resort” (willing but only if absolutely necessary). The shares of these segments have decreased somewhat since 2018, probably because of geopolitical difficulties and increased opportunities for virtual mobility. (See the sidebar “Virtual Mobility Is Increasingly Popular.”)

Given that 23% of our survey population falls into the actively mobile category, and considering the size of the active labor force around the world (3.55 billion according to the World Bank), we estimate that up to 800 million professionals could be actively looking for jobs abroad. To tap into this talent pool, companies need to understand what drives the choices that these workers make. Certain factors are crucial: country of origin; demographics, jobs, and industries; and economic and quality-of-life aspirations.

A TALENT SURPLUS IS A DEFINING FACTOR OF MOBILITY

Natives of countries with a labor surplus (owing to higher fertility rates) tend to be more mobile than those who live in areas where the labor force is dwindling. (See Exhibit 3.) Statistical analysis confirms that this correlation is strong and highly significant.

Mobility trends show people moving from growing societies to shrinking ones. Among our key findings in this area:

- The region with the highest percentage of respondents actively looking for jobs abroad is Africa, whose population and labor force are growing. African countries also have relatively low income levels and relatively high unemployment.
- Several Middle Eastern markets (in particular, the United Arab Emirates and Saudi Arabia) are also highly mobile. Even though these economies support relatively high average incomes, many of their residents are of foreign origin and therefore tend to be mobile.
- A number of South Asian and East Asian economies (notably, Indonesia, the Philippines, and India) and Turkey fall into the next tier of mobility. Population growth here is moderate or stagnant, and there is a similarly moderate desire for mobility.
- The lowest-mobility regions are Europe, North America, and parts of Asia-Pacific (Australia and China). In France, Italy, and Belgium (for example), mobility has slowed since 2020. Most countries in this group have a shrinking labor force, a strong labor market, relatively high wages, and relatively low unemployment. Under these conditions, people are less motivated to move.
- Mobility is also low in the Latin American countries of Mexico, Argentina, Chile, and Brazil. Although GDP per capita is low compared with that of economies in the previous group, these markets have relatively low birth rates and have experienced record low unemployment after COVID-19, which may have curbed workers’ willingness to emigrate.

Virtual Mobility Is Increasingly Popular

The worldwide shift toward remote work during the pandemic opened the door to virtual mobility—working remotely for an employer located in a country different from the one that the job seeker lives in.

Interest in virtual mobility continues to rise: 66% of our respondents said that they would consider working remotely for an employer that had no physical presence in their country, compared with 57% at the height of the pandemic. (See the exhibit.)

The flexibility of virtual mobility appeals to Hideo Daikoku, a 27-year-old R&D engineer who worked for the same employer while living in multiple countries. “I was in New York last year and worked there for a week, then in India in the winter. It’s really nice to have that refreshing environment. I think it’s really good for mental health.” But he still wants structure. “I think the digital nomad lifestyle can get old after a while. I’d like to have a place to call home but still be able to move to work from other places from time to time.”

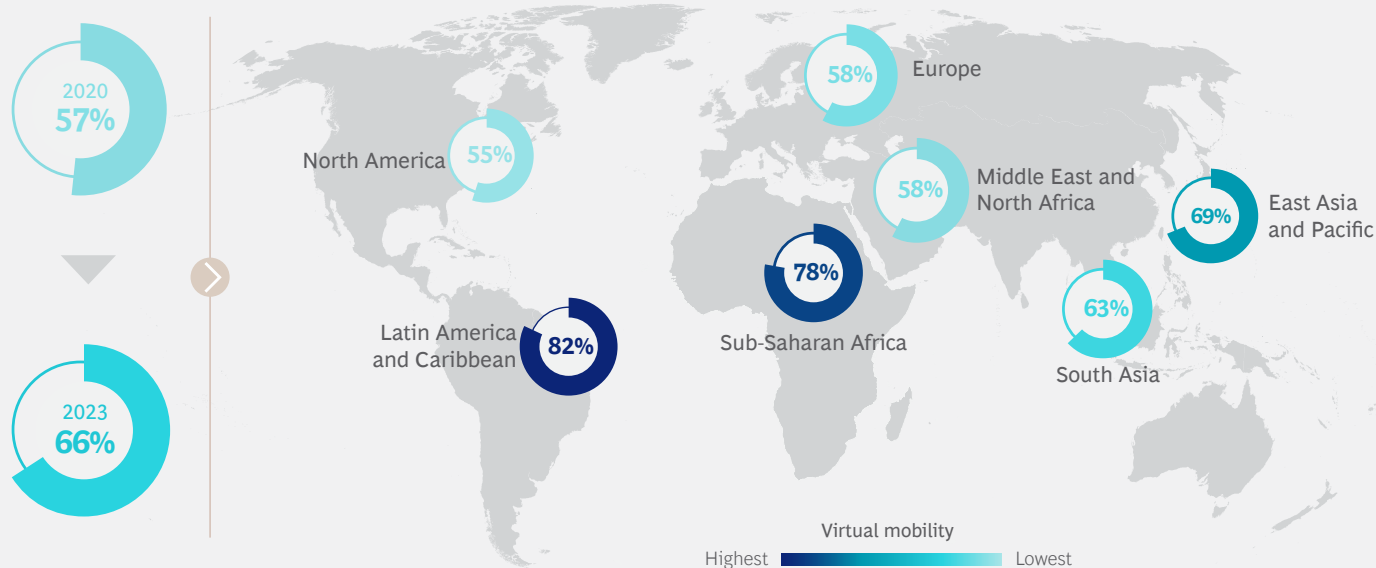
During the pandemic, people in less-developed economies, such as sub-Saharan Africa, Latin America, and the Caribbean, demonstrated the greatest interest in finding a virtual mobility opportunity. In the years since, the regions with high interest in virtual mobility haven’t changed much—except that interest has grown by 10% to 15% among job seekers in the East Asia and Pacific and South Asia regions.

Virtual mobility holds less appeal in the Middle East and South Asia, where people’s interest in working for an employer from another country may be driven by a desire to experience a social and cultural setting that’s different from their own.

Matej Hrapko, 44 and originally from Slovakia, sees both sides of virtual mobility. “It’s freedom,” he noted, “but it’s also more responsibility. In the end, it’s the results that matter, not how much time you spend in the office.”

Interest in Virtual Mobility Continues to Grow Globally

Respondents in 2023 who are willing to work for a foreign employer with no physical presence in their country, by region (%)



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

Exhibit 3 - Where Populations Are Growing, Talent Tends to Be More Mobile

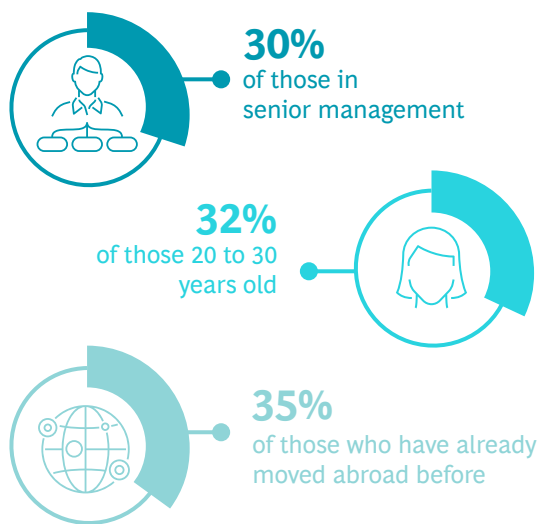


Source: 2023 BCG/The Network/The Stepstone Group proprietary web survey and analysis.

Note: Graph shows the 38 largest economies in our sample with sample size above 100.

Exhibit 4 - Age and Professional Background Strongly Influence Mobility

Respondents within the demographic category who are actively looking for jobs abroad



Most mobile occupations

- Engineering and technical (29%)
- Green jobs and sustainability (28%)
- Services and hospitality (28%)
- Education and training (26%)
- Design, art, creative professions, and architecture (26%)

Most mobile industries

- Agriculture (36%)
- Travel and tourism (31%)
- Hospitality (30%)
- Energy and utilities (29%)
- Skilled trades (29%)

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

AGE AND PROFESSIONAL BACKGROUND ARE KEY DRIVERS OF THE WILLINGNESS TO MOVE

Respondents with certain characteristics are more likely than others to be willing to relocate. Younger workers, those in senior management, and those who have already lived abroad (like our old friend Anne Granelli) are more mobile. Statistical analysis confirms a significant correlation in all of these cases.

Job roles and industries play a larger part than workers' level of education. People in tech roles and in green jobs (focusing on climate and sustainability) are the most mobile, probably because these **emerging roles are in high demand** around the world. Respondents from industries such as agriculture, travel, and hospitality are also ready to relocate—good news for the many developed economies that have insufficient numbers of workers in these fields. (See Exhibit 4.)

PEOPLE MOVE ABROAD FOR PROFESSIONAL AND FINANCIAL PROGRESS

People consider relocating primarily for economic and career growth opportunities. (See Exhibit 5.) They would like to build their professional futures through higher income, expanded work experience, and career advancement. Another strong motivator: having a concrete job offer in hand. If they secure all of these desired outcomes, it stands to reason that they'll also experience better quality of life, another mobility goal cited by a large share of respondents. Factors related to benefits offered by the new country matter less. Social systems, health care, political stability, a better climate, or a more accepting society are not the main drivers of job-related mobility.

Motivations to move differ by age and by region of origin. With regard to age, students, interns, apprentices, and young respondents (up to 30 years of age) cite "general career considerations" as the number-one reason to move for a job. They also care more about educational opportunities and interesting work than the average worker does. (See Appendix 1.)

Exhibit 5 - Respondents Move Abroad for Professional Progress

Respondents who cited the following reasons for their decision to move abroad for work, or not (%)



Reasons to go

Out of the 63% of respondents who are willing to move



Reasons to stay

Out of the 37% of respondents who are not willing to move



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

Note: "Respondents who are willing to move" comprises all categories of mobile respondents, from "actively mobile" to "mobile as a last resort." "Respondents who are not willing to move" comprises all non-mobile respondents. Reported results are based on the percentage of respondents who selected each listed reason for deciding to leave or not to leave the country.

Differences related to region of origin suggest that cultural factors play a role. For instance, North Americans and Europeans care less than others about career development and educational and training advancement when going abroad.

Instead, they tend to be more motivated by having a concrete job offer in hand and by the promise of a better quality of life. Patrick Byrne, 39, a lawyer and US native now residing in Madrid, offers insights into his motivation for working abroad: “Spaniards work quite hard and often work long hours. But they are rarely willing to let go of enjoying personal time with friends and family.”

Conversely, respondents from South Asia and sub-Saharan Africa most highly prioritize career development, followed by educational and training opportunities. Isuru Lakdeep Samarasinghe, a 33-year-old chef from Sri Lanka who now lives in Australia, said of his move, “The main reason was the opportunities for my professional career.” (See Appendix 2.)

Of course, there are also powerful reasons for people not to work abroad—primarily, personal considerations. Some people stay put because they can’t bring family members or a life partner with them on a move or because they feel a strong emotional attachment to their current country. Individual practical challenges such as cost of relocation, lack of information, or language barriers matter to fewer than a third of people who stay.

Where Do People Want to Go?

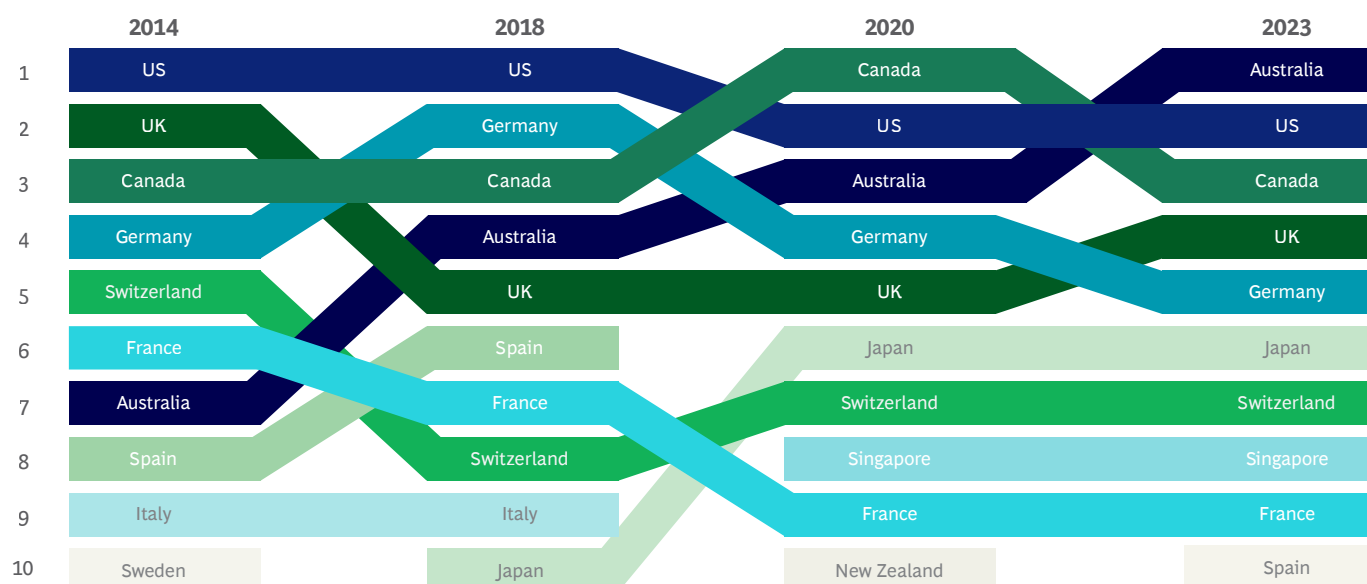
Anne Granelli, an advocate of global mobility, observed, “Australia is probably the dream country for a lot of people.” She was right. In 2023, Australia, which has been steadily rising through the ranks since we initiated this series, finally topped the list of desirable country destinations. (See Exhibit 6.)

Australia became more attractive to respondents from Asian countries, and it rose in popularity among respondents from North America, Africa, and several European countries, including the UK and Ireland. (See Exhibit 7.) The Australian economy has experienced an employment boom following the pandemic, with high wages and high demand for talent. This led to a record surge in net migration numbers to more than **half a million people** per year during 2022 to 2023. Our survey data indicates that 76% of respondents who moved to Australia for work have had a positive experience.

Constanze Freyberg, 27, moved from Germany to Australia, where she works as a consultant. “What was most important for me is that the local language is English. If you don’t speak the local language fluently, it’s difficult to work and to become part of the local community,” she explained. “Also, I wanted to move out of Europe, and Australia seemed most attractive, with good visa pathways, great weather, and a lot to see.”

Exhibit 6 - In 2023, Australia Became the Top Destination

Rank, by number of respondents who would be willing to move to each country for work



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

Exhibit 7 - The Top Three Destinations Are in Close Competition

Rank, by number of respondents in each region who would be willing to move to each country for work



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

In discussing his decision to move to Australia, chef Isuru Lakdeep Samarasinghe also praised the country's visa system and financial prospects. "The visa category is designed to attract foreign employees. That perfectly aligned with my requirements and the financial security I was hoping for. It became a great opportunity for me to develop my professional career and my personal life," he said.

Overall, though, the upper echelon of the rankings hasn't changed much. Canada and the US are still top-three talent destinations because of the attractive economic opportunities they offer and because they are, simultaneously, English-speaking countries and global melting pots. "The economy in the US, in some sectors at least, is really booming," observed Manuel Milliery, the Italian entrepreneur now living in Paris. "I lived in California for a couple of years, and I think that is my go-to place at some point in the future, for my own personal and business reasons."

The UK and Germany continue to be among the top five target countries. Despite Brexit, migration to the UK rose to record highs in 2023, driven primarily by the introduction of new non-EU student and work visas, and by an increase in humanitarian visas for residents of regions of conflict. For its part, Germany has made efforts to simplify the entry of skilled workers under the new Skilled Immigration Act, and it has introduced a new naturalization law to make obtaining citizenship easier.

Matej Hrapko, currently living in Austria, says that Germany is appealing because it "is the best-performing land in Europe." The proximity to Austria appeals to him too. "It has advantages for people from Austria. It would be easy to work there. It's a four-hour drive."

The most dramatic change we found in the rankings was Spain's reemergence among the top ten, after becoming less attractive during the pandemic (the country was hit hard early on). Today, Spain is especially attractive to respondents from other European countries. It's the number-four choice for German respondents, up from number nine in 2020, for example. And respondents from Latin America prioritize Spain because of the shared language.

Patrick Byrne, the US lawyer now in Madrid, advocates Spain as a destination. "I really just love the culture," he said. "I think Spaniards have a very good outlook on life. They have this great balance."

As for specific cities that respondents aspire to move to, London maintains its position at the top of the list. ([See the sidebar "London's Unwavering Appeal Makes It the World's Top Destination City."](#))

London's Unwavering Appeal Makes It the World's Top Destination City

Since 2014, one city has ruled as the most attractive destination for work: London. Given our findings regarding what matters to global talent, we attribute this global appeal to five key features:

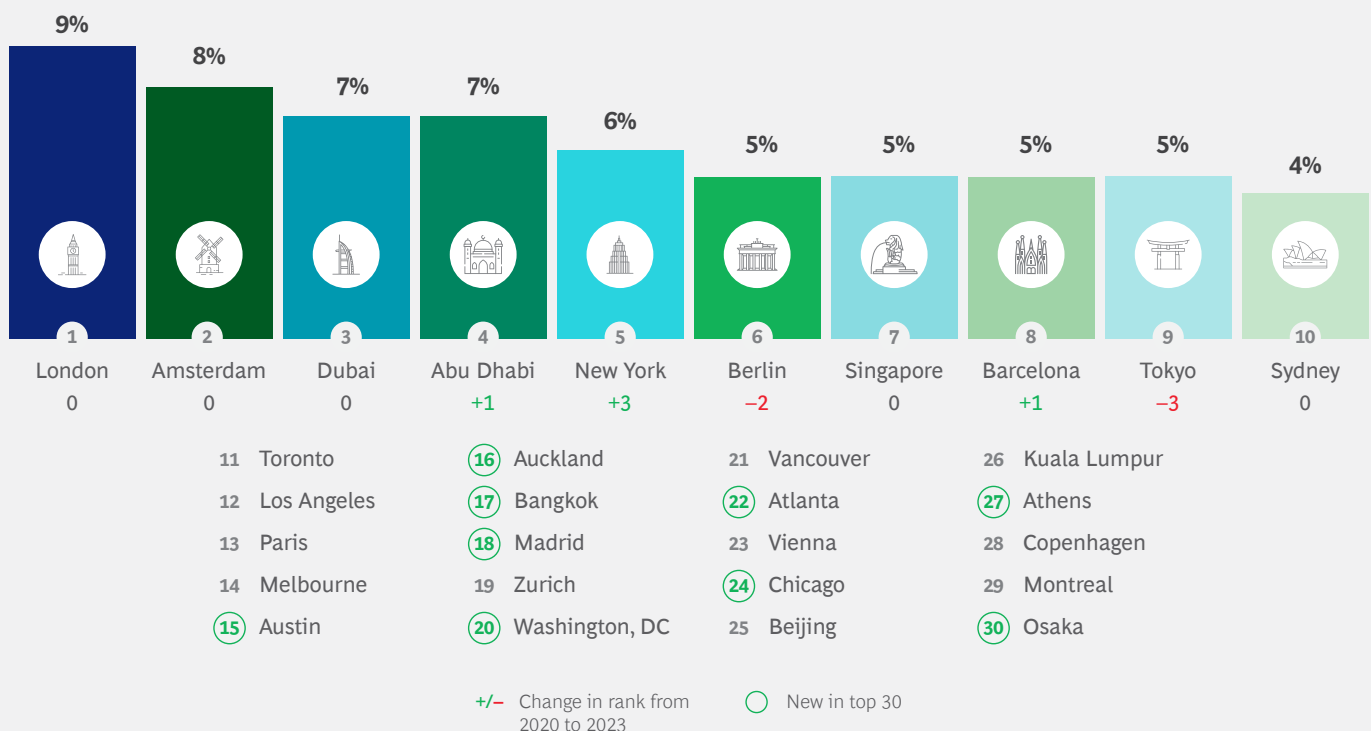
- English as the primary language
- An exceptional global network, reflecting the fact that much of the talent already working in London comes from other countries, forming a strong diaspora from throughout the world and leveraging connections within the Commonwealth
- Plentiful economic and financial opportunities
- A welcoming, multicultural brand—despite Brexit
- Access to both Europe and the US

London's appeal makes sense to R&D engineer Hideo Daikoku: "London seems very young. There's always stuff happening in London. Another big factor, I would say, is the language. People would rather move to an English-speaking city because they already speak English."

Amsterdam continues to be the number-two destination metropolis, and the Middle Eastern cities of Dubai and Abu Dhabi, which have gained popularity in recent years, rank third and fourth. New York returns to the top five in our most recent survey, and several US cities made it to the top 30 as newcomers. (See the exhibit.) In addition to such classic continental European cities as Berlin, Barcelona, Paris, Madrid, Zurich, and Vienna, the list features nine Asia-Pacific destinations, three of them—Singapore, Tokyo, and Sydney—in the top ten.

London Is Still the Number-One Destination City

Ranked by percentage of respondents who would be willing to move to each city



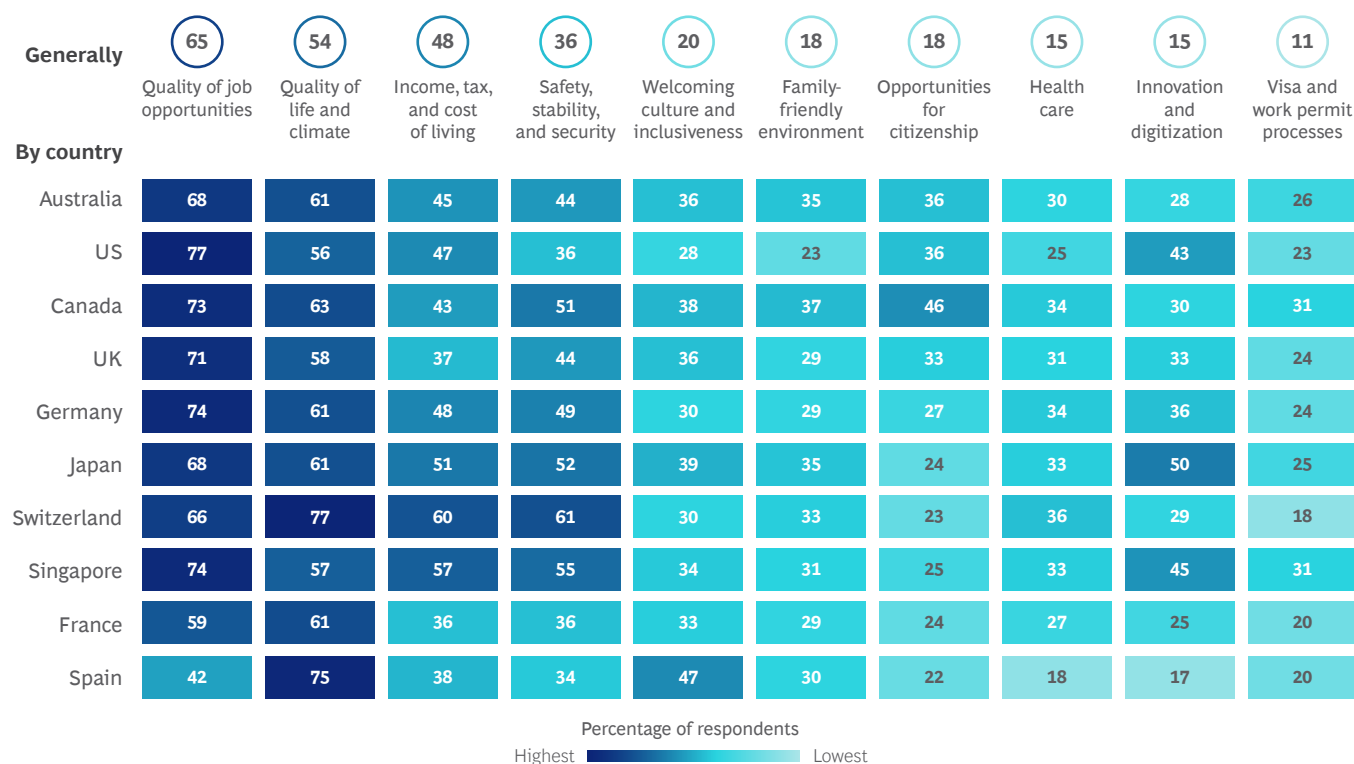
Source: 2023 BCG/The Network/The Stepstone Group proprietary web survey and analysis.

People relocate for economic reasons and choose their destinations on the basis of job opportunities there.



Exhibit 8 - Respondents Choose Countries on the Basis of Job Quality

Respondents who listed a specific reason for choosing the country (%)



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

Note: The list of factors was inspired (with modifications) by the factors assessed in the OECD's 2023 *Indicators of Talent Attractiveness*. Respondents were asked to identify the top three factors that appealed to them about their most desired destination countries.

Why Do People Choose a Specific Country?

For this year's report, we dug deeper to find out how people who are willing to move for work choose a destination. We looked at extrinsic and intrinsic factors—and then we examined how closely workers' perceptions of destination countries match up with the realities.

EXTRINSIC FACTORS: PEOPLE CHOOSE COUNTRIES BASED ON JOBS AVAILABLE

To better understand why people choose a specific destination, we asked respondents to consider a list of possible reasons, inspired by the definitions used by the Organisation for Economic Co-operation and Development (OECD) in its 2023 *Indicators of Talent Attractiveness* report.

We anticipated receiving a wide variety of responses reflecting major differences in individual countries' brands, but that's not what happened—at least not entirely. In looking at the top destinations and the reasons why people choose them, we found that individual country brands tend to be superseded by a singular, consistent, primary consideration: the quality of job opportunities. (See Exhibit 8.) This is in line with our previous findings that many people move abroad to pursue economic and career prospects.

A few countries, though, benefited from another prominent consideration: quality of life. Factors related to income also rank as important, closely connected to the jobs people would like to hold. Less important cultural and environmental aspects of living in the country of choice include safety and stability, inclusiveness, family friendliness, citizenship options, innovation, and health care. The factor that respondents cited least often was visa and work-permitting processes—perhaps because they expect employers to take care of these formalities after they accept a job offer, as we'll discuss later in this report.

A few differences among countries in the top ten are notable:

- **Australia**, the overall number-one destination, was strongly favored for quality of job opportunities; for quality of life; and for income, tax, and cost of living—as well as for safety, stability, and security.
- **The US** ranked highest for quality of job opportunities and very highly for innovation and digitization. Compared with other top ten countries, however, the US earned relatively low approval for its safety.

- **Canada** earned the highest mark among the top ten countries for opportunities for citizenship, and it ranked highest among the top five countries for safety.
- **Germany** is among the best countries for job opportunities and received consistently high ratings across most key factors related to destination choice.
- **Switzerland, France, and Spain** are favored primarily for their high quality of life, in contrast to most other top ten countries, where job opportunities mattered the most. Switzerland stands out further for stability.
- **Japan and Singapore** outranked their peers on innovation and digitization, and they are considered very stable and safe, with high income levels. In fact, many people are keenly aware of safety issues, which is one reason why Hideo Daikoku favors Japan. He told us, “It’s very comfortable to live here. There’s no conflict; it’s very safe. If you’re concerned with safety in the US, I think Japan would be a really nice place to move to.”

To unpack what respondents meant when selecting certain factors as reasons for choosing their preferred countries, we pointed them to a list of subfactors. (See Appendix 4.) For example:

- We defined **quality of job opportunities** as job security, skill improvement, and fit between the person and the job, suggesting that they recognize the importance of ensuring that their skills align with the role and that the employer appreciates those skills so that a big international move doesn’t put them in a job at an organization that undervalues their work.

- Underlying the appeal of **quality of life** are factors that directly influence respondents’ daily lives, such as housing, transport infrastructure, and leisure options. Considerations such as weather, climate, and nature rank a bit lower but still carry significant weight.
- In **income, tax, and cost of living**, the undisputed top priority was competitive salary and wage levels in the profession. Even so, respondents did not overlook financial security and the ability to save for the future, along with the importance of a stable and predictable income.

INTRINSIC FACTORS: LANGUAGE AND RECOMMENDATIONS MATTER MOST

We also looked at practical considerations related to the individuals themselves, rather than to the countries. We asked participants to identify the practical considerations that impelled them to select their preferred destinations.

Overall, speaking the primary language or languages of the destination country matters a lot, especially where English-speaking countries are favored. (See Exhibit 9.) Personal recommendations from acquaintances who have experience with the destination country also make a difference, particularly where non-English-speaking countries are concerned. So does having a diaspora of their nationality in the target destination. Geographical proximity was less important to respondents than we had expected, except among those from some Asian countries. People aren’t particularly worried about their passports either—again because they expect to find a job with an employer that will help them obtain the needed legal access to the country.

Exhibit 9 - Language and Recommendations Are the Most Important Practical Considerations

Rank, by number of respondents who listed a specific reason for choosing the country

	I speak the language(s) of this country	Others recommended this country	Many people of my nationality live in this country	I have family or friends in this country	This country is near my current country	My passport allows easy entry	I have been to this country before
Australia	1	2	3	4	5	6	7
US	1	2	3	4	7	6	5
Canada	2	1	3	4	7	5	6
UK	1	2	3	4	7	6	5
Germany	4	1	2	3	7	6	5
Japan	7	1	2	6	3	4	5
Switzerland	2	1	6	7	3	5	5
Singapore	2	4	3	7	1	5	6
France	2	1	3	5	6	7	4
Spain	2	4	5	7	6	3	1

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

PERCEPTION VERSUS REALITY

Our survey mostly reflects subjective perceptions of what destination countries offer workers from abroad. Respondents don't necessarily know much about the latest regulatory changes in immigration, the actual state of the labor market, or the experience of people from other countries there. For a more objective picture, we performed two different types of comparative analysis.

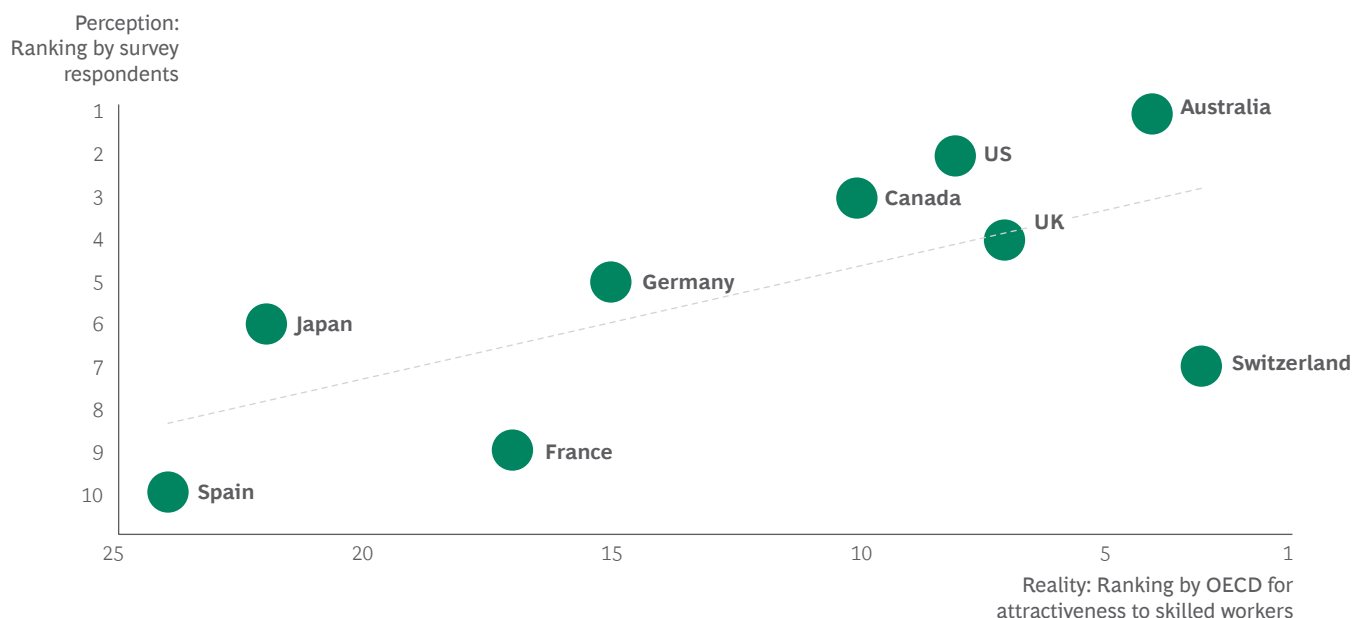
First, we compared the preferences of our respondents with the OECD's 2023 *Indicators of Talent Attractiveness* study, which ranks countries according to their attractiveness to skilled workers. (See Exhibit 10.) Overall, our survey respondents exhibited good judgment: we found a clear correlation between countries' subjective ranking by our survey respondents and countries' objective OECD score. (See Appendix 5.)

Second, we compared the opinions of would-be immigrants versus those of actual immigrants, leveraging our sample of 13,500 respondents currently working abroad. In this case, we asked immigrants to identify the top three factors they value about living abroad.

We found that once people move abroad, their priorities shift slightly. Safety, stability, and security becomes the top factor, followed closely by quality of life and quality of job opportunities. These may be the factors that most influence their decision to stay or leave. (See Exhibit 11.)

Exhibit 10 - Respondents' Perception of Top Destinations Is in Line with Reality

OECD ITA rankings compared with the rankings of the top countries our respondents would move to



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

Note: The comparison of ranking by survey respondents to ranking by OECD is based on objective factors that influence attractiveness to skilled workers, as defined in the OECD's 2023 *Indicators of Talent Attractiveness* report. Singapore is excluded because it is not part of the OECD. ITA = *Indicators of Talent Attractiveness*.

Exhibit 11 - What People Value Before They Leave Differs from What They Value After They Have Settled



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

What Do People Expect from Their Employers When Moving Abroad for Work?

We know from [past research](#) that job seekers want jobs that provide positive relationships with colleagues, a good work-life balance, and attractive financial compensation. These attributes are still important, but others—like job security—have job seekers' attention as well. Clearly, employers must first ensure that they understand and meet prospective workers' basic needs (which often differ considerably by country of origin). But when seeking a job abroad, workers must consider other factors as well.

WHEN CHOOSING AN EMPLOYER ABROAD, CULTURE MATTERS AS MUCH AS MONEY

Global talent is attracted by employment in places where English is the official working language. A top-tier salary package matters, of course, but factors such as equal employment opportunities for locals and immigrants, and cultural acceptance and belonging are nearly as important as money. (See [Exhibit 12](#).)

The most significant differences emerge when we look at the needs of respondents in different regions:

- Fully 86% of respondents from the **sub-Saharan region** consider it important that the official working language be English.

- In contrast, the corresponding figure in **Latin America and the Caribbean** is only 32.8%. Nevertheless, individuals from both regions consider equal-employment opportunities for locals and immigrants to be of above-average importance.
- For individuals from **Europe**, top-tier salary packages and a smooth relocation and onboarding process are of high importance.

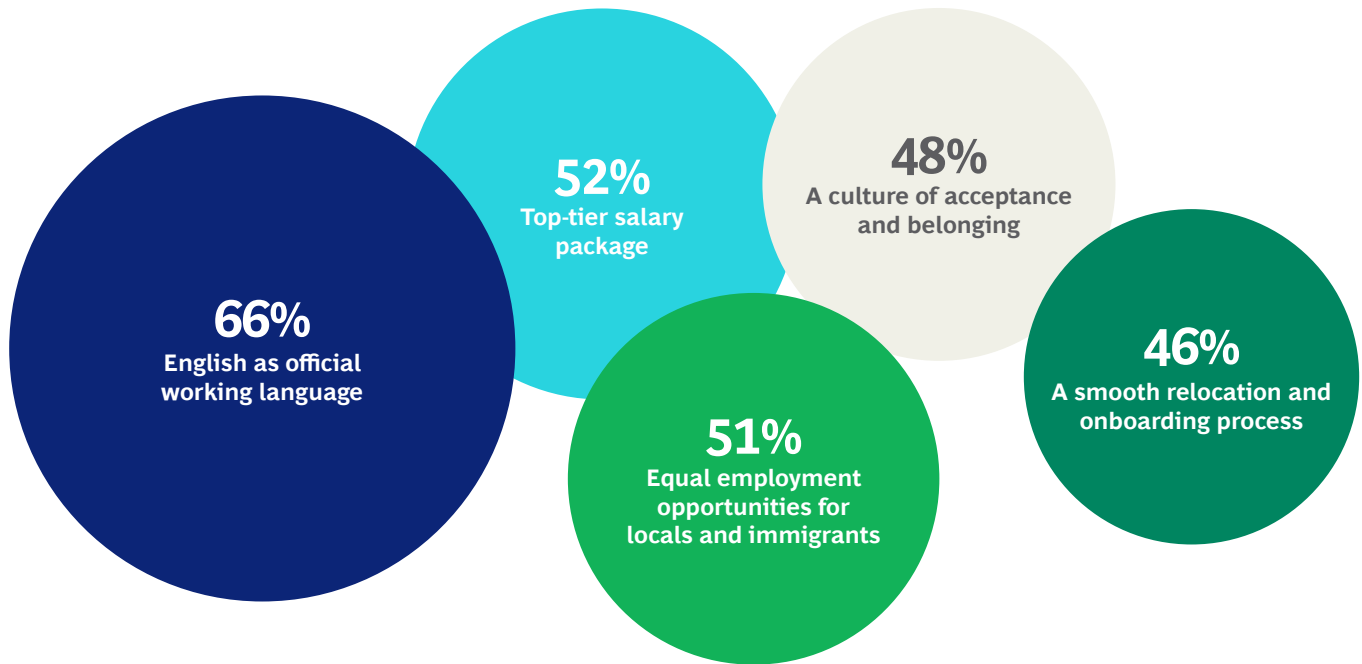
EMPLOYERS SHOULD TAKE THE LEAD IN PROVIDING RELOCATION SUPPORT

Workers who seek international employment have some practical expectations as well. Most respondents, regardless of age, job role, or background, expect their employer to take the lead in making their relocation happen. (See [Exhibit 13](#).)

It's essential that employers support relocation, explained Tomilola Abiodun, a native of Nigeria who now works as a senior product manager in Seattle. "They should pay for the relocation, give you support, help you with accommodations until you settle down on your own, help you with the visa process for you and your family," she said.

Exhibit 12 - Global Talent Prefers Employers That Offer Certain Key Advantages

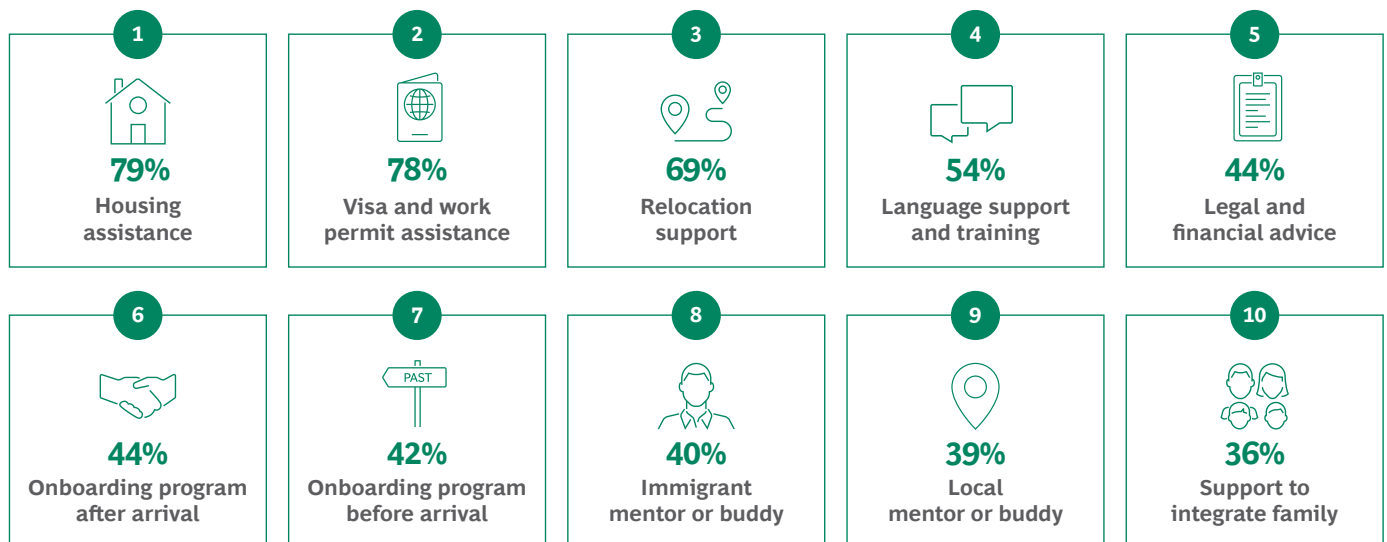
Respondents who expect their future employer to offer the following characteristics



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

Exhibit 13 - Respondents Expect Employers to Support Relocation

Respondents who expect their future employer to offer support in the following areas



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



More than 75% of respondents expect their future employer to provide assistance with regard to housing, visas, and permits.

Four categories of relocation issues are most significant:

- **Housing, Visas, and Relocation.** The vast majority of respondents need their future employer to provide assistance with housing, visa and work permit processes, and physical relocation. This is in line with our findings that respondents tend not to be overly concerned about these factors. They believe that once they have an offer in hand, their employer will support them in getting to the country.
- **Language Training.** More than half of respondents want their new employer to offer language courses.
- **Onboarding and Buddy Programs.** Structured onboarding before and after arrival and being paired with a buddy (either a local mentor or another immigrant) can significantly accelerate respondents' ability to master their new responsibilities.
- **Family Integration.** More than a third of respondents expect their employer to help integrate their family members into the destination country, such as by helping with childcare or schooling or by supporting their partner in finding a job.

What Can Employers and Governments Do?

People's interest in moving abroad for work is significant, as are the benefits for employers and national and local economies. We recommend that businesses and governments target several key strategic areas and offer mobile talent advice along each step of the journey that they will be taking. (See Exhibit 14.)

It's no accident that we start with recommendations for employers. The companies that employ international talent are responsible for their new hires' moves. Our data shows that most respondents want concrete job offers before they move and expect their new employer to support their relocation.

Governments play a strong enabling role in this process. They can establish policies, incentives, and frameworks that help employers bring in the talent they need.

RECOMMENDATIONS FOR EMPLOYERS

Other countries can be a great source of talent. But establishing a channel of workers from abroad requires employers to fundamentally overhaul how they recruit, relocate, and integrate talent. They may have to challenge their own biases and look for talent in markets and regions that they had not previously considered. We recommend adopting a comprehensive global talent strategy that comprises six steps.

Exhibit 14 - How Employers and Governments Can Facilitate Talent Mobility

	Employers Actively attract, support, and integrate job seekers	Governments Enable employers to tap into global talent
 Planning and strategy	<ul style="list-style-type: none"> • Forecast talent needs, and craft an international location strategy 	<ul style="list-style-type: none"> • Take a strategic approach to managing immigration
 Attraction and recruitment	<ul style="list-style-type: none"> • Refine the employee value proposition to resonate with new audiences • Boost international recruitment channels 	<ul style="list-style-type: none"> • Boost the country brand, with a focus on jobs • Build bilateral partnerships
 Relocation and immigration	<ul style="list-style-type: none"> • Offer extensive relocation support 	<ul style="list-style-type: none"> • Ensure fast-tracking for critical skills • Make immigration user-friendly
 Onboarding and integration	<ul style="list-style-type: none"> • Onboard new arrivals and their families • Ensure an inclusive and international work environment 	<ul style="list-style-type: none"> • Promote labor market inclusion • Promote societal inclusion

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

**To attract foreign talent,
an inclusive, international culture
is as important as the salary
package.**



Forecast talent needs, and craft an international location strategy. Companies must identify which talent profiles they need, how many, and when. They must identify talent gaps two to three years in advance. Gaps that are difficult to fill from the local workforce are the best candidates for international recruitment.

The next challenge involves figuring out where to find the needed talent. What talent hot spots promise to meet specific recruitment needs? The availability of needed talent profiles is a key factor, of course. But employers must also weigh how motivated that talent is to move to a particular market, and why.

Refine the employee value proposition to resonate with new audiences. When targeting global talent, employers must get basic criteria right (such as offering attractive job opportunities and salaries, using English, and being inclusive). But people from different origin countries place varying emphasis on other factors (such as relationships with colleagues and flexibility) that make a company **a great place to work**. To successfully recruit from abroad, companies need a value proposition customized to each relevant international market.

For example, Bosch sought to recruit talent from Africa on the strength of its brand as a multinational engineering and technology company, but it found that its existing employee value proposition didn't resonate there. In response, it revised its proposition—emphasizing development opportunities, work-life balance, and diversity and inclusion—to better align with the aspirations and values of the African workforce.

Boost international recruitment channels. According to our data, having a job offer in hand is a major reason why people move abroad. To get to that point, employers must ensure that candidates in other markets see their job opportunities. Employers should invest in recruitment campaigns in key markets, collaborating with international recruitment experts to run job ads in multiple countries. They should also consider partnering directly with education institutions in different markets and attending job fairs and industry events.

In 2022, Deutsche Börse, the German stock exchange operator, approached The Stepstone Group to explore recruiting from multiple European countries in addition to Germany, its core market. The first target was Luxembourg, but the scope quickly expanded to encompass Slovakia, the Czech Republic, and Switzerland, in light of language requirements, available talent, and the company's local footprint. Deutsche Börse now recruits flexibly across these countries. When a vacancy opens, the company decides where to advertise, thereby broadening its talent pool considerably.

Offer extensive relocation support. A large percentage of our respondents believe that it is the employer's responsibility to support them during the entire relocation process with regard to legal and visa matters, housing, language courses, and financial advice. We concur. Fulfilling this obligation might require investment and effort, including a relocation package that covers a spectrum of needs beyond traditional moving services. Offering a package of fixed value, but with flexible components, is a good way to improve the candidate experience (for example, schooling support for families versus transportation of pets).

"Move Happy," Atlassian's relocation program for new international hires, provides new employees with airfare; temporary housing; work visas; assistance in finding schools, permanent housing, and furniture; and more. Atlassian also sets up regular events to connect new hires who are going through the same transition.

Onboard new arrivals and their families. To ensure that new hires hit the ground running, employers must support smooth onboarding to the company (for example, via a structured orientation process and a buddy system) and to the country (by providing language courses or supporting connections to other workers from abroad). Helping the families of workers from other countries settle in the new country matters, too.

Meta's relocation package goes beyond the logistics of moving. The company offers programs aimed at helping employees and their families integrate into their new community, including language classes and social events.

In 2011, Nestlé, PMI, and Ernst & Young teamed up to launch the International Dual Career Network (IDCN), which supports the spouses of candidates that these companies hire from abroad. The IDCN now spans 14 countries, supporting professional integration by connecting spouses to job and training opportunities.

Ensure an inclusive and international work environment. Employers must adjust their culture and work environment to create a safe, inclusive space for talent from all backgrounds. This adaptation includes practical considerations such as using English as a working language, and equal employment opportunities such as accepting differences, building cross-cultural teams, and celebrating diverse holidays and customs. The effort may require challenging existing biases. Finally, monitoring the satisfaction, performance, and career progress of foreign hires is critical to identifying pain points and improving workplace inclusiveness.

Japan-based e-commerce firm Rakuten, for example, switched all communication to English, a major culture change that met with initial resistance but ultimately facilitated the free exchange of ideas among Rakuten's staff from more than 30 countries and expanded the hiring of non-Japanese employees, notably a large share of new engineers.

RECOMMENDATIONS FOR GOVERNMENTS

Take a strategic approach to managing immigration.

Much as employers should regularly analyze their future workforce needs, governments should monitor their country's demographic trends and labor market needs. Governments can then define their objectives for meeting demand, identifying target groups that match the required skill profiles and appropriate origin countries to focus on. They must also partner closely with industry to ensure that their immigration plans align with local employers' needs. Finally, governments must define a clear owner—such as a [public talent investment fund](#)—with a clear business case, give it a mandate to set immigration targets, and provide it with the resources necessary to achieve them.

Canada has taken its first steps toward such a structured approach. It has created a new government post: chief international talent officer (CITO). The CITO's role is to ensure that immigration aligns with Canada's labor market needs. This involves addressing current economic pressures (such as consistent job vacancies in the construction and health care sectors) and helping develop longer-term sector-based strategies.

Boost the country brand, with a focus on jobs. Countries can benefit from branding campaigns, both physical and online. These should focus on defined target groups and, in the first instance, promote the job opportunities that particular national economies offer (the primary reason for choosing a country). Beyond promoting jobs, nations can emphasize aspects that contribute to their unique appeal.

Australia's Department of Home Affairs runs a website called Smart Move Australia. Its main tagline is “live your dream career,” and its message to skilled workers from abroad is direct: “We want workers from a range of industries, especially health, education, infrastructure, ICT, and technology to make the smart move Down Under. With the Australian Government fast-tracking visa applications from skilled workers outside the country, now is the time to turn your Aussie dream into reality.” The Australian government also runs job fairs and targeted recruitment campaigns in key markets, such as the UK, for workers in areas of high demand.

Build bilateral partnerships and programs. Governments can support the inflow of talent by developing bilateral labor migration agreements with key source markets. Such agreements usually result from negotiations between countries that are struggling to fill talent gaps and countries that have a surplus of workers. The resulting pacts cover migration targets, pathways to visas, and measures to protect migrants' rights and ensure an organized, effective process.

For example, Germany has taken steps in this direction by formalizing agreements with India (December 2022), Georgia (December 2023), and Vietnam (January 2024) to ease the relocation of talent, and it is also negotiating agreements with other countries, including Kenya and Morocco.

Fast-track talent with critical skills. Employers' efforts to fill talent gaps with foreign workers are futile without visa system support. Governments must ensure that people who possess critical skills can enter a country's workforce and start contributing to the national and local economy quickly. Moving away from one-size-fits-all visas toward skill-based and differentiated immigration policies is key.

For example, Singapore has a highly differentiated system of work passes, with distinct regulations for top foreign talent, tech industry leaders, skilled foreign employees, entrepreneurs and innovators, and more. For incoming talent not covered by these special visas, the government introduced a framework that scores prospective immigrants on factors related to both the person (such as skill level) and the future employer (such as being active in industries related to strategic economic priorities).

Make immigration user-friendly. Countries must facilitate a smooth immigration process, to make applying for and gaining the right to immigrate as easy and fast as possible, especially for in-demand talent groups.

Finland is one country that has recognized this. In 2022, it took the first steps toward instituting a leaner, less bureaucratic immigration process for workers, setting up a fast procedure designed to ensure that highly skilled migrants will receive a decision on their residence permit within two weeks of applying.

Engaging with incoming talent and providing individualized support throughout the application journey also makes a difference. For example, New Zealand provides a comprehensive website for prospective workers from abroad, including a dedicated contact center for personalized queries. It covers all stages of the application process and is available in 14 languages.

Promote labor market inclusion. After foreign talent has arrived, governments continue to have a role to play in ensuring that the new workers are fully integrated into the labor force. This may include one-stop-shop information services for immigrants, a smooth process for recognizing foreign qualifications and degrees, job matching programs, and upskilling opportunities.

For example, Canada recently announced that it would invest \$86 million in a process to recognize foreign health care credentials more quickly, thereby alleviating the chronic shortage of health care workers.

And Sweden has developed measures to integrate immigrants into its labor market, from low-touch programs for facilitating fast labor market integration to the more comprehensive *Etableringsprogrammet*, which is directed toward refugees and includes, among other things, individual counseling and educational and vocational training.

One respondent said, “I love the idea of adventure. Just the idea of living somewhere else, trying something new, experiencing another culture. That alone is an amazing thing.”



Promote societal inclusion. Global talent moves involve more than work. These individuals must live in and be part of their new home country's society, whether that's an explicit goal of their move or a side effect of a job-focused decision. Either way, governments should actively support newcomers' societal inclusion. On the cultural side, governments should promote immigration in public opinion, foster a welcoming culture, combat discrimination based on race or origin, and treat successful immigrants as ambassadors who are well positioned to promote the country as a destination for other mobile talent.

The Australian Human Rights Commission has launched a campaign called "Racism. It Stops With Me." It provides tools and resources to help people and organizations learn about racism and take action to create change. The website also hosts the Workplace Cultural Diversity Tool, a free, online, confidential self-assessment for organizations seeking to strengthen their approach to cultural diversity and antiracism in the workplace.

On the policy side, governments should ensure that incoming workers have long-term potential for residency in the country and a clear path to citizenship if they wish. The German government, for instance, recognizes that offering a route to citizenship plays an important part in the social integration of foreign workers. In January 2024, the Bundestag decreased the time required for naturalization to a minimum of five years. It will also permit dual citizenship (currently allowed only in exceptional situations) on a broader scale. The law is expected to increase uptake of German citizenship and make Germany a more attractive labor market.

People who have moved abroad for work—or aspire to—do so for a variety of practical reasons, as we've seen. But there's also a sort of *joie de vivre* that takes hold among mobile talent. Patrick Byrne shared with us, "I love the idea of *adventure*. Just the idea of living somewhere else, trying something new, experiencing another culture. That alone is an amazing thing."

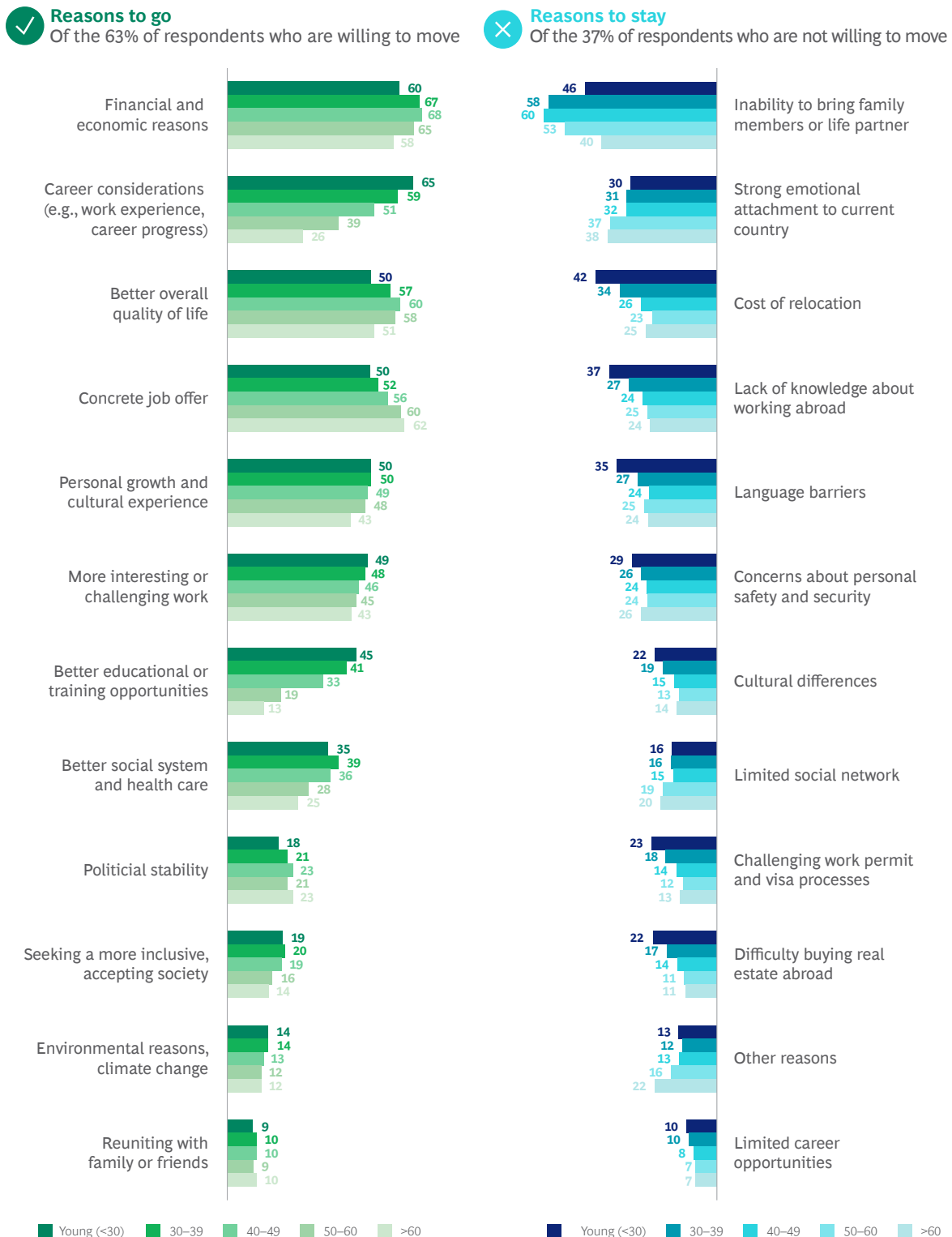
Employers and nations that tap into such positive energy, from the millions of workers with mobile aspirations, will gain a major competitive advantage and source of growth.



Appendixes

Appendix 1 - Reasons to Leave or Stay, by Age

Respondents, segmented by age group, who cited the following reasons for their decision to move—or not to move—abroad for work (%)



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

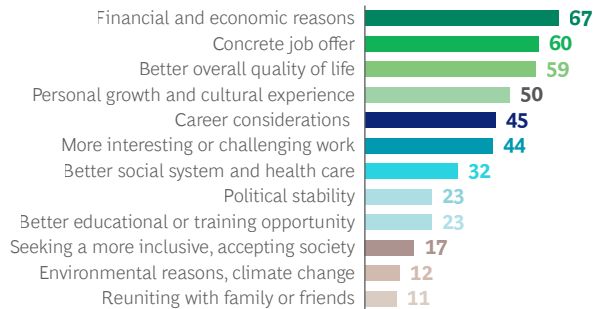
Note: “Respondents who are willing to move” refers to all categories of mobile respondents, from “actively mobile” to “mobile as a last resort.” Figures are based on the percentage of respondents who selected each listed reason for deciding to leave or not to leave the country.

Appendix 2 - Reasons for Going Abroad Differ by Region

Respondents who selected each specific reason for wanting to go abroad for work (%)



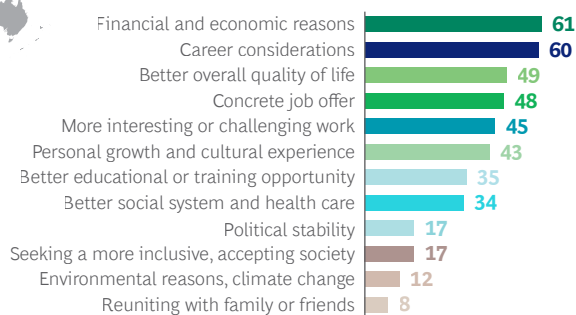
Europe



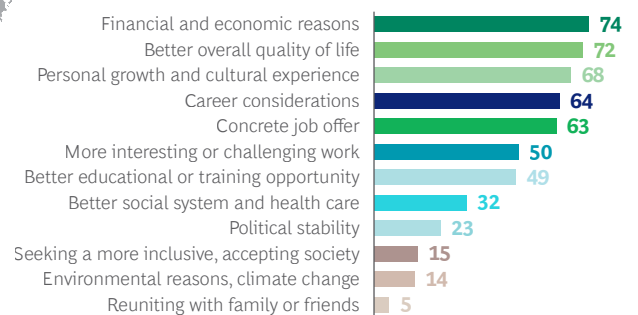
North America



East Asia and Pacific



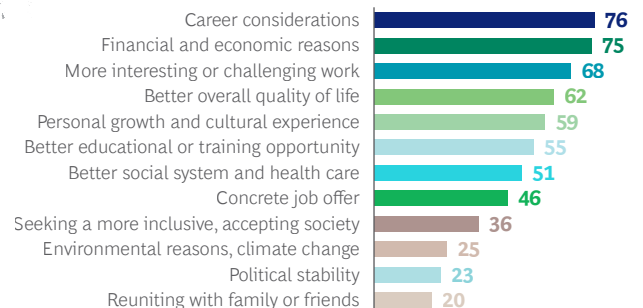
Latin America and the Caribbean



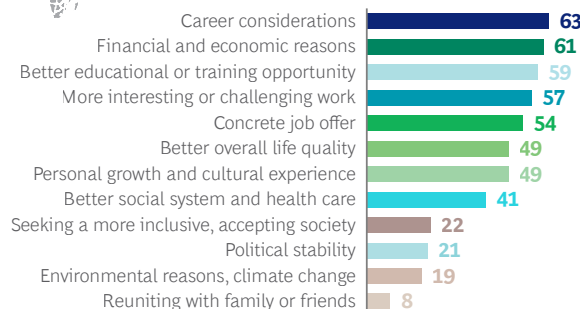
Middle East and North Africa



South Asia



Sub-Saharan Africa



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

Appendix 3 - Top Country Destinations by Demographics and Geography

Where people with different backgrounds say they would work

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

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

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

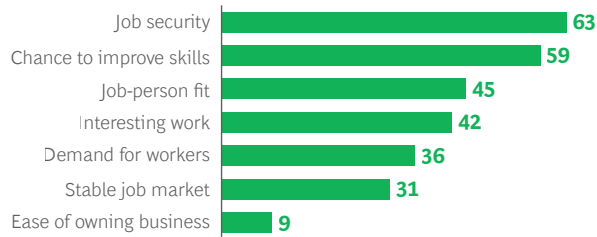
Notes: “Highly educated” is defined as having a bachelor’s or master’s degree, a doctorate, or the equivalent. “Less educated” is defined as having no more than a high school education or no formal education. “Digital talent” is defined as individuals employed in roles that specialize in digitization, data science, AI, or IT. “Blue collar” is defined as being employed in the service sector. “White collar” is defined as including office personnel and university staff. “Younger” is defined as younger than 30. “Older” is defined as 60 or older. UAE = United Arab Emirates.

Appendix 4 - What Really Matters Most When Choosing a Country and Moving Abroad

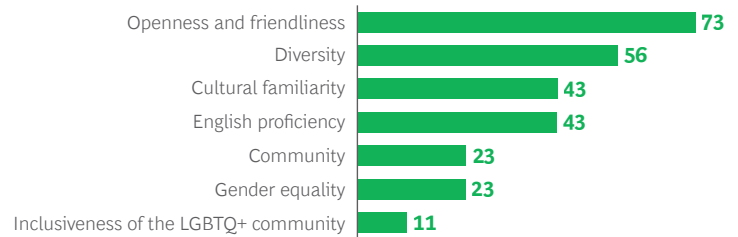
Respondents who selected the following factors as top considerations within each specific category (%)



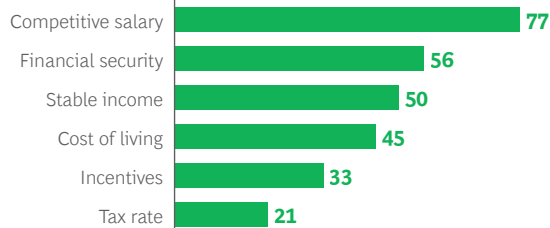
Quality of job opportunities



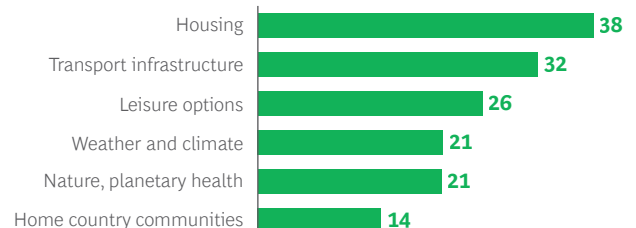
Welcoming culture and inclusiveness



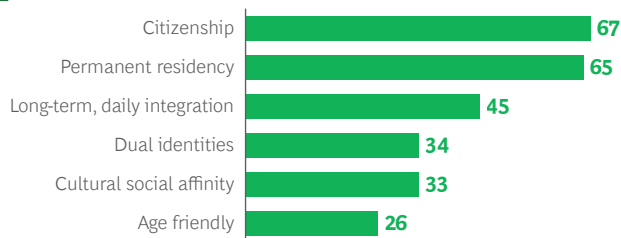
Income, tax, and cost of living



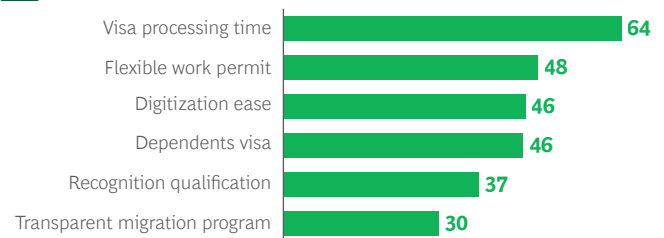
Quality of life



Opportunities for citizenship



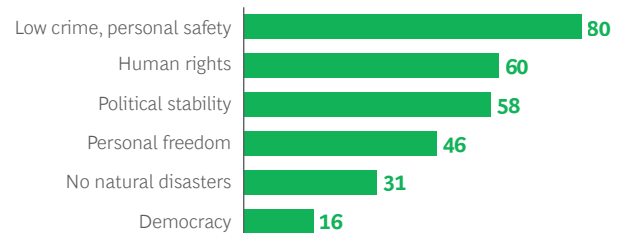
Visa and work permit processes



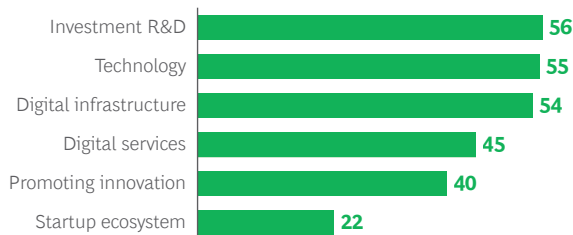
Family-friendly environment



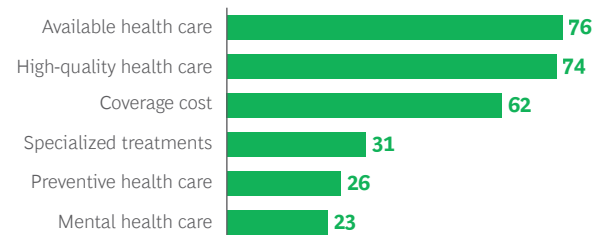
Safety and security



Innovation and digitization



Health care



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

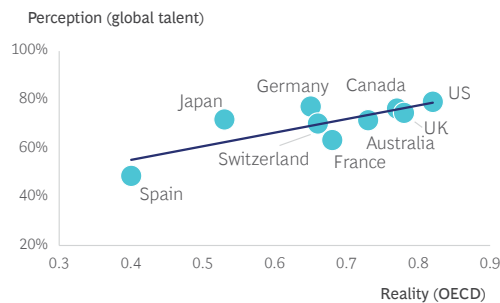
Note: The ranking is based on the top three preferences that respondents selected within the three most important factors considered in the context of moving abroad.

Appendix 5 - Perception Versus Reality, by Reason for Choosing a Country

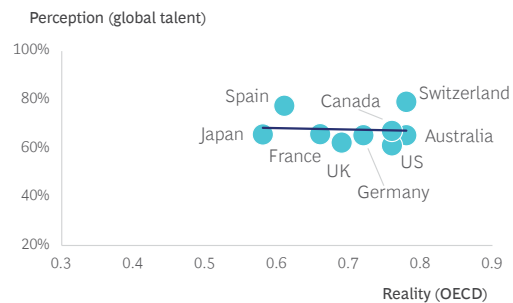
Relationship between extrinsic factors (motivation to choose a specific country) and the OECD's *Indicators of Talent Attractiveness* (ITA) across various categories



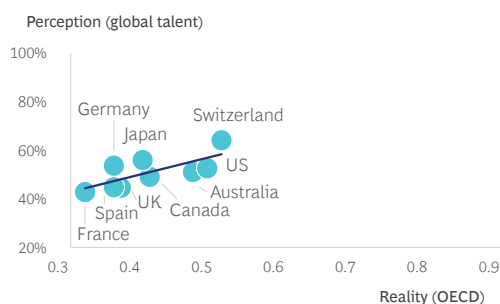
Quality of job opportunities



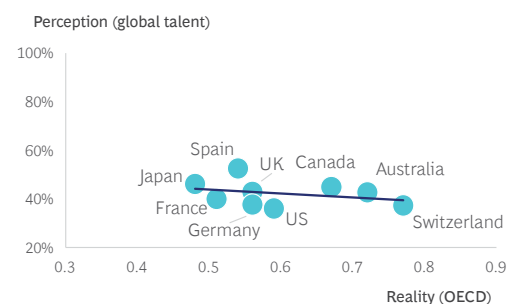
Quality of life and climate



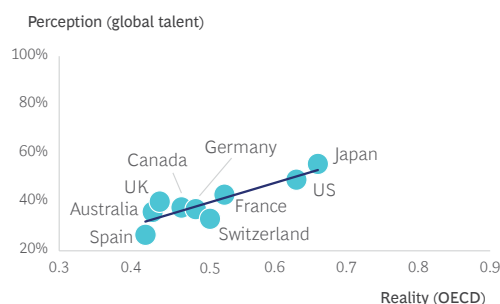
Income, tax, and cost of living



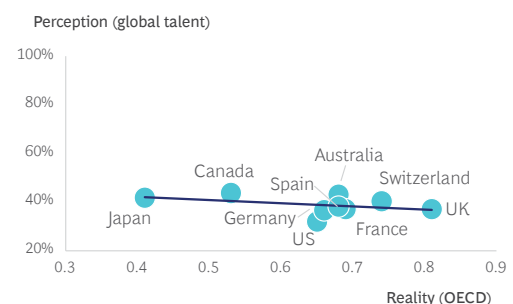
Welcoming culture and inclusiveness



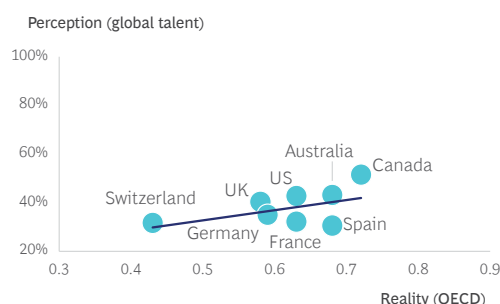
Innovation and digitalization



Family-friendly environment



Opportunities for citizenship



High correlations occur in categories with clear criteria (e.g., “Quality of job opportunities,” “Income, tax, and cost of living,” “Innovation and digitization,” and “Opportunities for citizenship”), indicating that professionals' relocation motivations match the country's strengths in these areas

Conversely, **more subjective categories** (e.g., “Quality of life and climate,” “Family-friendly environment,” and “Welcoming culture and inclusiveness”) **lack clear correlations**, revealing their true nature only through firsthand country experience

Sources: OECD; 2023 BCG/The Network/The Stepstone Group proprietary web survey and analysis.

Note: The ITA benchmarks a country's ability to attract global talent on the basis of objective factors, with scores ranging from 0 to 1 (where 1 is the strongest country's performance in the category). In the category mapping, five categories (“Quality of job opportunities,” “Quality of life and climate,” “Income, tax, and cost of living,” “Family-friendly environment,” and “Welcoming culture and inclusiveness”) fully match. For the other categories, we equate “Innovation and digitization” to ITA's “Skills environment” and “Opportunities for citizenship” to ITA's “Future prospects.” Singapore is omitted because it is a non-OECD country.

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