GFMD
Marrakech, Morocco

Stephen Cryne, President and CEO
Canadian Employee Relocation Council
December 7, 2018
Fortune 500

23% founded by children of immigrants

18% founded by immigrants

41% “NEW AMERICAN” COMPANIES
Fortune 500 companies founded by immigrants or children of immigrants

CERC
Leadership for Workforce Mobility
What CEO’s Think

20th CEO Survey

People make things really click

77% of CEOs worry that skills shortages could impair their company’s growth

ceosurvey.pwc #CEOSurvey

© 2017 PricewaterhouseCoopers LLP. All rights reserved.
Philosophy in Canada

“Canada is in a unique position now to leverage what some are calling our immigration advantage. And as can be seen in the global environment, there are more and more countries that are closing their doors to people, they're closing their doors to talent, to skills...

We welcome the innovation, the innovative perspectives, the entrepreneurial spirits, and the unique skill sets of skilled newcomers.”

Immigration, Refugees and Citizenship Canada, Minister Hussen November 1, 2017
BUT WILL THEY MOVE: LIKELIHOOD TO CONSIDER MOVING FOR A NEW JOB IN ANOTHER COUNTRY
CERC Global Mobility Poll

18% of employees would be ‘very likely’ to temporarily relocate for up to 2 years and take a full-time job in another country with a 10% pay increase.

Down from 25% in 2012

Twice as many employees could be convinced to relocate if the incentive package from their employer was right.

37%

Or provides support for their spouse to get a job.

36%
CERC Global Mobility Poll

KEY INCENTIVES TO MOTIVATE AN EMPLOYEE TO ACCEPT A RELOCATION:

- **36%**
  - Paid Language Training

- **36%**
  - Guaranteed Option to Return to Current Role After 2 Years

- **33%**
  - Immigration Assistance for Spouse/Partner

- **35%**
  - Airline Tickets for Family Visits
CERC Global Mobility Poll

% OF EMPLOYEES ‘VERY LIKELY’ TO RELOCATE

- Total: 18%
- Brazil: 37%
- Mexico: 35%
- South Africa: 35%
- Argentina: 30%
- Russia: 23%
- Turkey: 22%
- Italy: 20%
- Canada: 19%
- India: 19%
- United States: 18%
- Poland: 15%
- Australia: 15%
- Spain: 13%
- France: 13%
- Great Britain: 11%
- Netherlands: 10%
- Germany: 10%
- China: 9%
- Japan: 9%
- South Korea: 8%

40% of global employees agree 'there is nothing my employer could do to convince me to take an international assignment'
**Likelihood To Move To Another Country**

- FL2a_3. How likely would you be to consider moving for a new job in another country if you could have a minimum 10% increase in your pay and all your moving expenses covered if you had... To temporary relocate for up to 2 years. Base: All Respondents (n=10,091)

- *Note the question changed since 2012.*

### Likelihood To Move To Another Country

<table>
<thead>
<tr>
<th>Country</th>
<th>Very Likely</th>
<th>Somewhat Likely</th>
<th>Top2Box (Very Likely/Somewhat Likely)</th>
<th>2012</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>18%</td>
<td>27%</td>
<td>46%</td>
<td>57%</td>
<td>-11%</td>
</tr>
<tr>
<td>Brazil</td>
<td>37%</td>
<td>29%</td>
<td>66%</td>
<td>56%</td>
<td>10%</td>
</tr>
<tr>
<td>South Africa</td>
<td>35%</td>
<td>28%</td>
<td>62%</td>
<td>66%</td>
<td>-4%</td>
</tr>
<tr>
<td>Mexico</td>
<td>35%</td>
<td>27%</td>
<td>62%</td>
<td>77%</td>
<td>-15%</td>
</tr>
<tr>
<td>Argentina</td>
<td>30%</td>
<td>31%</td>
<td>61%</td>
<td>59%</td>
<td>2%</td>
</tr>
<tr>
<td>Turkey</td>
<td>22%</td>
<td>32%</td>
<td>53%</td>
<td>74%</td>
<td>-21%</td>
</tr>
<tr>
<td>India</td>
<td>19%</td>
<td>34%</td>
<td>52%</td>
<td>70%</td>
<td>-18%</td>
</tr>
<tr>
<td>Italy</td>
<td>20%</td>
<td>31%</td>
<td>51%</td>
<td>52%</td>
<td>-1%</td>
</tr>
<tr>
<td>Russia</td>
<td>23%</td>
<td>26%</td>
<td>49%</td>
<td>66%</td>
<td>-17%</td>
</tr>
<tr>
<td>Poland</td>
<td>15%</td>
<td>29%</td>
<td>44%</td>
<td>59%</td>
<td>-15%</td>
</tr>
<tr>
<td>South Korea</td>
<td>8%</td>
<td>35%</td>
<td>43%</td>
<td>57%</td>
<td>-14%</td>
</tr>
<tr>
<td>China</td>
<td>9%</td>
<td>33%</td>
<td>42%</td>
<td>66%</td>
<td>-24%</td>
</tr>
<tr>
<td>Canada</td>
<td>19%</td>
<td>23%</td>
<td>42%</td>
<td>46%</td>
<td>-4%</td>
</tr>
<tr>
<td>Australia</td>
<td>15%</td>
<td>26%</td>
<td>41%</td>
<td>47%</td>
<td>-6%</td>
</tr>
<tr>
<td>France</td>
<td>13%</td>
<td>28%</td>
<td>40%</td>
<td>44%</td>
<td>-4%</td>
</tr>
<tr>
<td>Spain</td>
<td>13%</td>
<td>26%</td>
<td>40%</td>
<td>59%</td>
<td>-19%</td>
</tr>
<tr>
<td>US</td>
<td>18%</td>
<td>21%</td>
<td>39%</td>
<td>48%</td>
<td>-9%</td>
</tr>
<tr>
<td>Great Britain</td>
<td>11%</td>
<td>28%</td>
<td>39%</td>
<td>52%</td>
<td>-13%</td>
</tr>
<tr>
<td>Germany</td>
<td>10%</td>
<td>26%</td>
<td>36%</td>
<td>46%</td>
<td>-10%</td>
</tr>
<tr>
<td>Netherlands</td>
<td>10%</td>
<td>18%</td>
<td>28%</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>Japan</td>
<td>9%</td>
<td>17%</td>
<td>26%</td>
<td>36%</td>
<td>-10%</td>
</tr>
</tbody>
</table>

- FL2a_3. How likely would you be to consider moving for a new job in another country if you could have a minimum 10% increase in your pay and all your moving expenses covered if you had... To temporary relocate for up to 2 years. Base: All Respondents (n=10,091)

- *Note the question changed since 2012.*
TOP DESTINATION COUNTRIES
CERC Global Mobility Poll

Global employees place high value on the kind of country they would move to:

- Quality/accessible health care system: 82%
- Friendly to immigrants: 77%
- Good social security system: 77%
CERC Global Mobility Poll

TOP FOUR DESTINATION COUNTRIES FOR RELOCATION ARE:

- THE U.S. 30%
- CANADA 22%
- THE U.K. 19%
- AUSTRALIA 19%
Top Countries To Relocate – Total

<table>
<thead>
<tr>
<th>Country</th>
<th>First Choice</th>
<th>Second Choice</th>
<th>Third Choice</th>
<th>Net</th>
<th>2012 Net</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>United States</td>
<td>10%</td>
<td>10%</td>
<td>10%</td>
<td>30%</td>
<td>34%</td>
<td>-4%</td>
</tr>
<tr>
<td>Canada</td>
<td>7%</td>
<td>8%</td>
<td>7%</td>
<td>22%</td>
<td>20%</td>
<td>2%</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>7%</td>
<td>6%</td>
<td>6%</td>
<td>19%</td>
<td>22%</td>
<td>-3%</td>
</tr>
<tr>
<td>Australia</td>
<td>6%</td>
<td>7%</td>
<td>6%</td>
<td>19%</td>
<td>20%</td>
<td>-1%</td>
</tr>
<tr>
<td>Germany</td>
<td>6%</td>
<td>6%</td>
<td>5%</td>
<td>17%</td>
<td>15%</td>
<td>2%</td>
</tr>
<tr>
<td>Switzerland</td>
<td>6%</td>
<td>5%</td>
<td>5%</td>
<td>16%</td>
<td>16%</td>
<td>n/c</td>
</tr>
<tr>
<td>Spain</td>
<td>5%</td>
<td>5%</td>
<td>4%</td>
<td>14%</td>
<td>9%</td>
<td>5%</td>
</tr>
<tr>
<td>New Zealand</td>
<td>5%</td>
<td>4%</td>
<td>4%</td>
<td>13%</td>
<td>12%</td>
<td>1%</td>
</tr>
<tr>
<td>France</td>
<td>4%</td>
<td>5%</td>
<td>4%</td>
<td>13%</td>
<td>13%</td>
<td>n/c</td>
</tr>
<tr>
<td>Italy</td>
<td>4%</td>
<td>4%</td>
<td>4%</td>
<td>12%</td>
<td>11%</td>
<td>1%</td>
</tr>
</tbody>
</table>

* FL3. Still assuming you had a full-time job opportunity abroad, which country would you most want to relocate to?
Base: All Respondents 2017 (n=10,091); All Respondents 2012 (n=12,827)