



# Global Relocation Trends

## 2010 Survey Presentation

### Key Findings

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# Agenda

- Background and Methodology
- International Assignee Population
- Assignment Types and Benefits
- Global Business Strategy
- Cultural and Family Issues
- Looking Forward ... The Next Big Challenge
- Q & A



# Background and Methodology

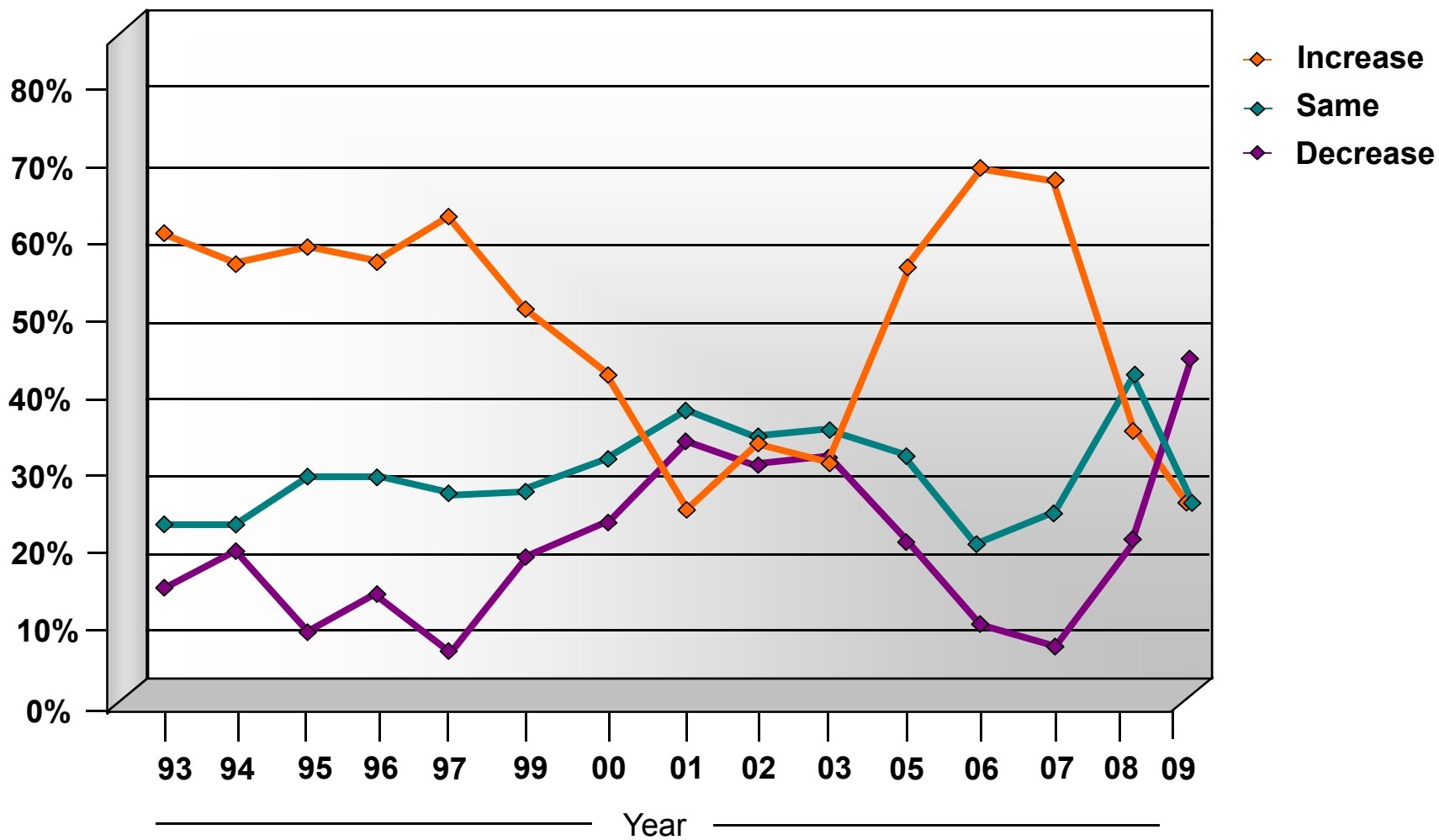
## Percentage of Responding Companies by Size of Total International Assignee Population

Int'l Assignee Population	2006	2007	2008	2009
1 – 25	21%	15%	17%	18%
26 – 50	13%	15%	15%	20%
51 – 100	10%	12%	18%	14%
101 – 500	33%	35%	32%	26%
501 – 1,000	9%	10%	10%	12%
Over 1,000	14%	13%	8%	10%



# International Assignee Population

# Assignee Population Growth Trends



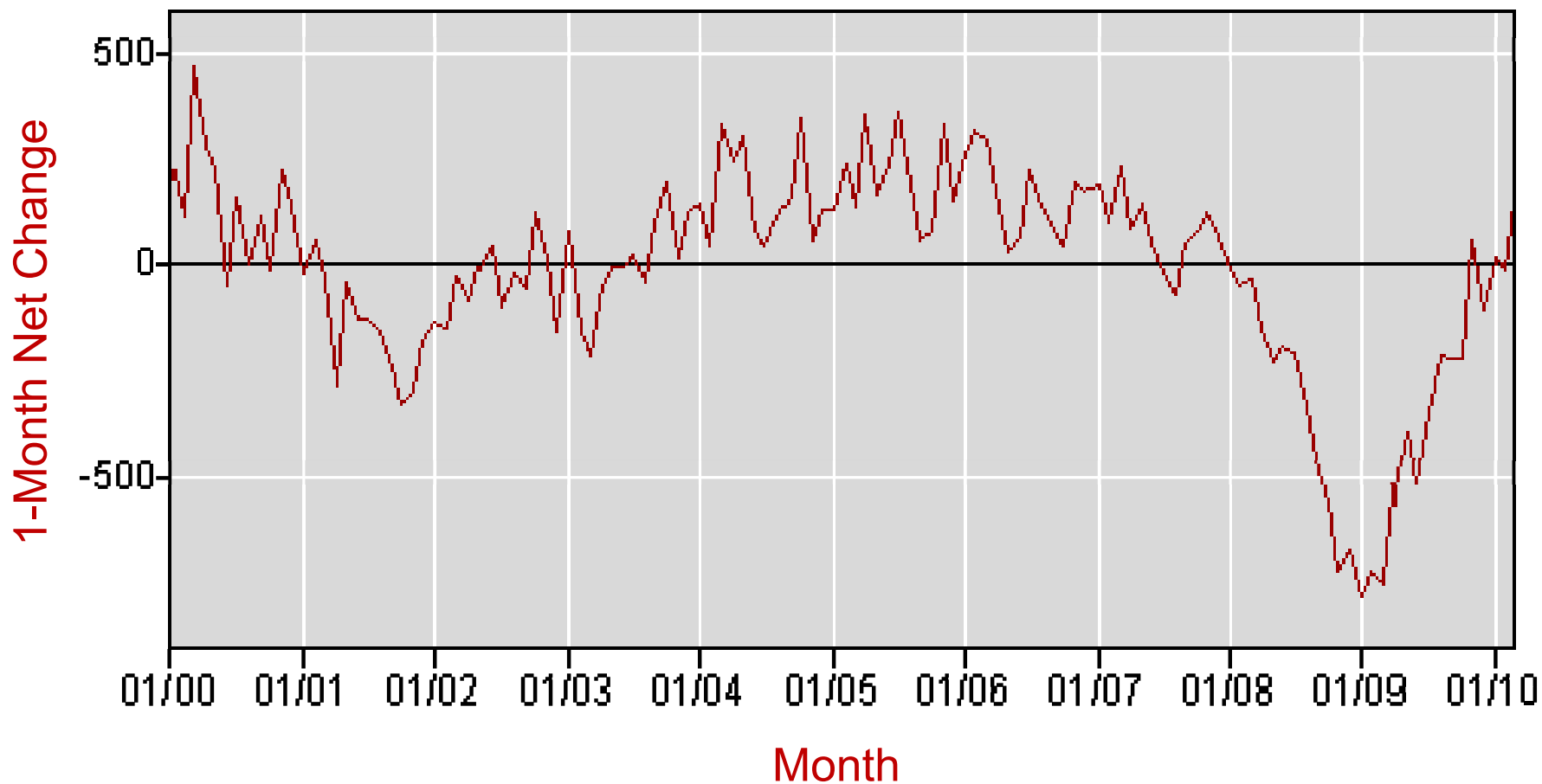
## On the Rebound!

Expected increase in assignee  
expatriate population for 2010

44%

# U.S. Employment Data - March

Net payroll jobs increased by 162,000



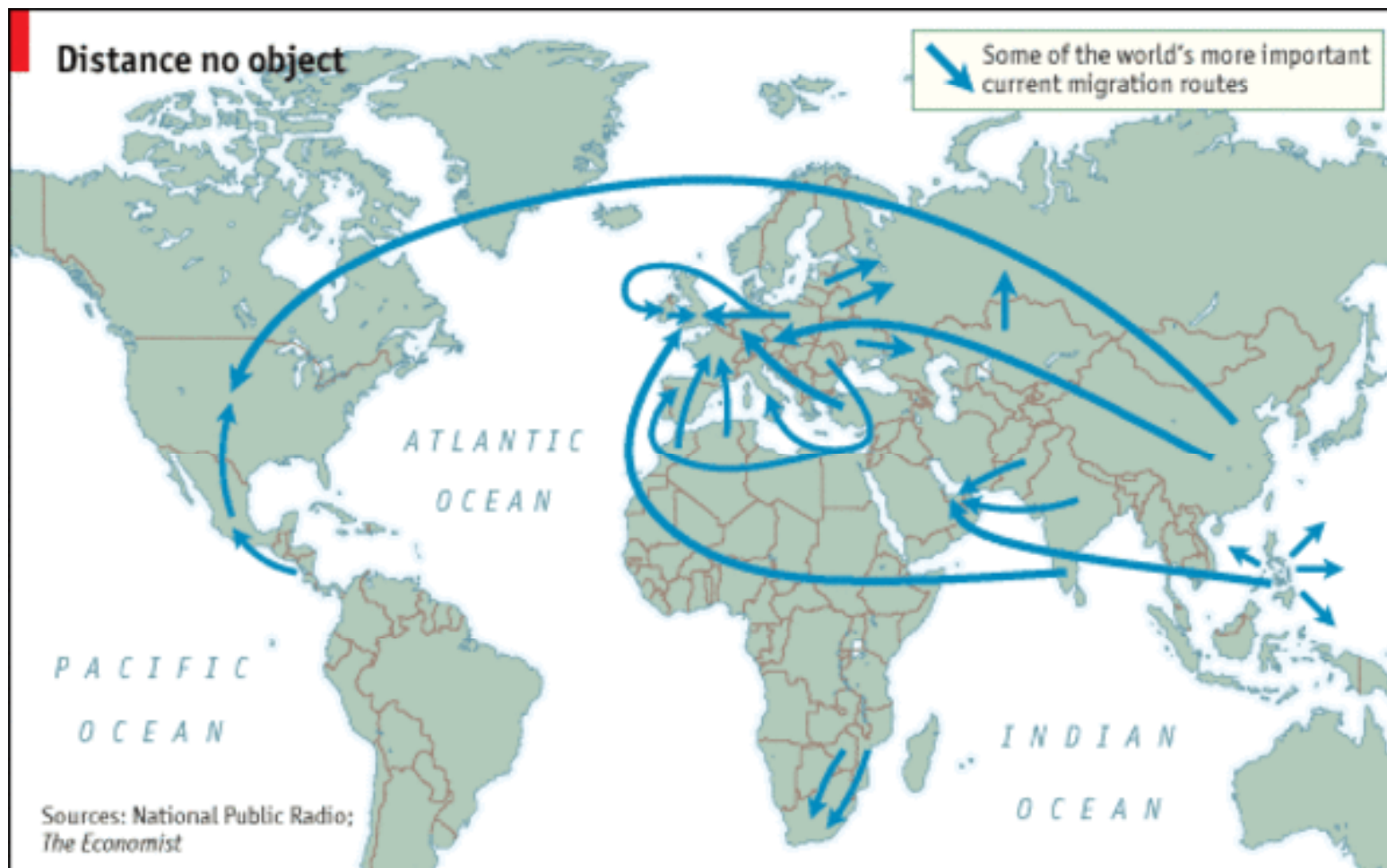
# Assignee Demographic Trends

- Age
  - 9% are between the ages of 20-29 years. Down 5% points and the lowest in the history of the survey
  - 32% between 30-39. Down 6 points from last years survey
  - 40% between 40-49. Up 8% points over the last two years
  - 16% between 50-59. Up 2 points from last years survey
- Marital / family status
  - 70% married. Up 10% points over the last two years
  - 47% have accompanying children. Lowest in the history of the survey
- Spouse / partner employment
  - 50% employed before assignment only 9% employed on assignment



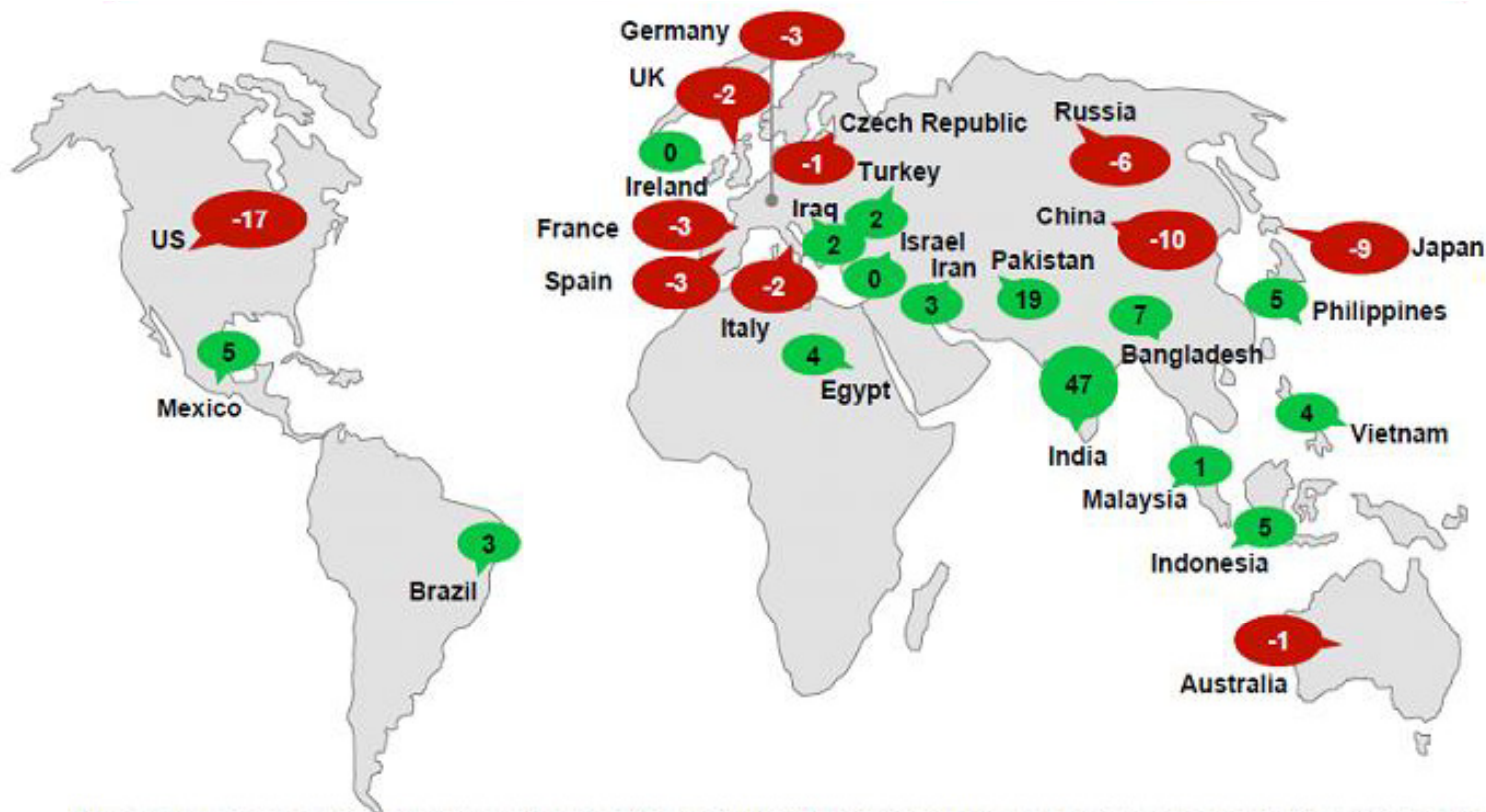
# Assignment Types and Benefits

# Global Workforce Migration Patterns



# Working Population Shortage and Excess by 2020

In millions



Note: Potential population is calculated as the number of people in the working age group (15-59) that each country will either be in shortage of or will have a surplus in 2020 assuming the ratio of working population to total population needs to remain constant to sustain current levels of economic growth  
 Source: U.S. Census Bureau; BCG Analysis

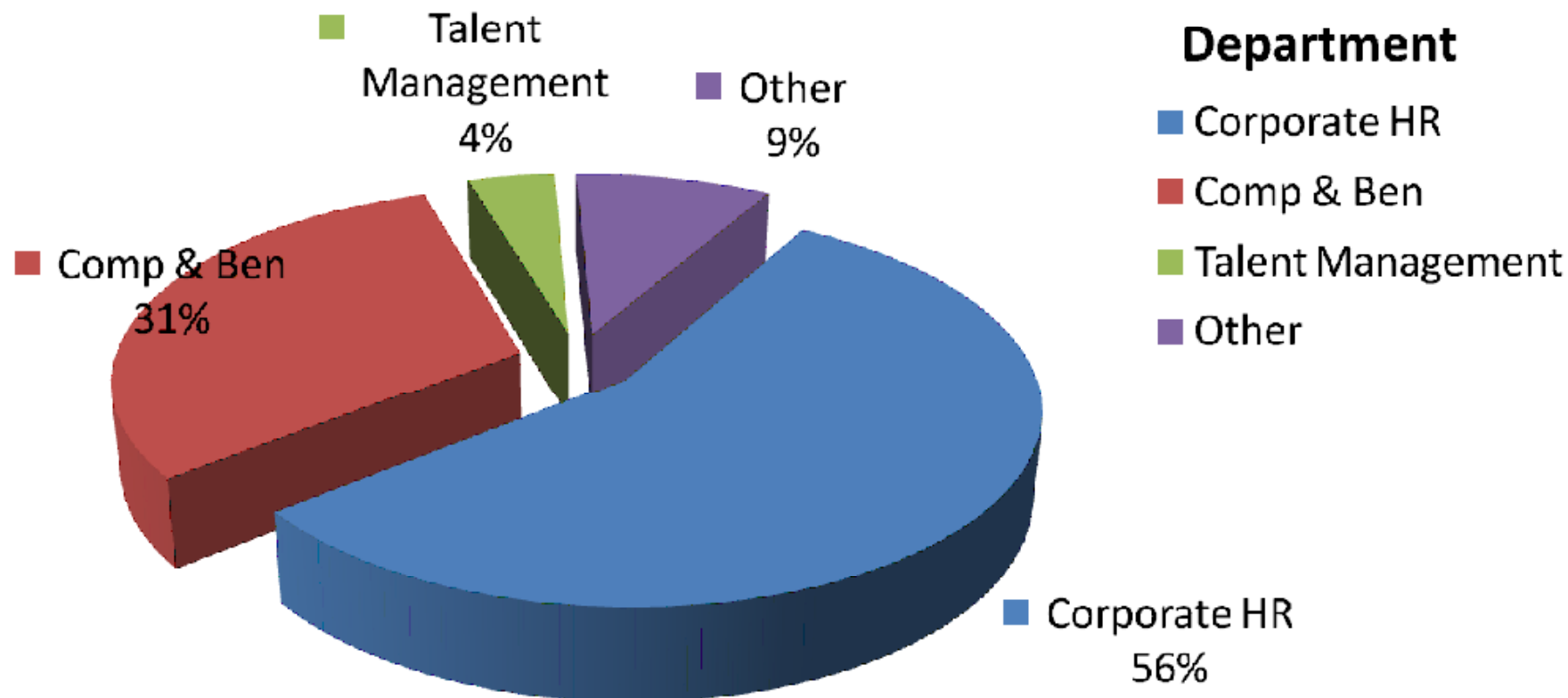
# Policy and Program Diversification

1. Localization policies	58% and 28%
2. Permanent international transfer	55% and 15%
3. Extended business travel	44% and 28%
4. Local Hire	38% and 11%
5. Commuter	35% and 36%
6. Developmental	16% and 16%
7. Graduate	9% and 4%



# Global Business Strategy

# Global Mobility Function Reporting



#1

# Assignment Challenges That Are Critical to Companies

1. Cost of assignment
2. Controlling policy exceptions
3. Finding suitable candidates
4. Career management
5. Retention of assignees
6. Inability to use experience after repatriation

# Initiatives to Improve ROI of International Assignments

1. Better candidate assessment and selection
2. Career planning
3. More effective communication of assignment objectives
4. Better assignment preparation
5. More communication and recognition during an assignment
6. Mandatory cross-cultural training
7. Company sponsored mentoring program



# Cultural and Family Issues

# Most Critical Family Issues

1. Family adjustment
2. Children's education
3. Partner resistance
4. Cultural adjustment
5. Difficult location
6. Partner career
7. Language
8. Assignment length
9. Other dependent family



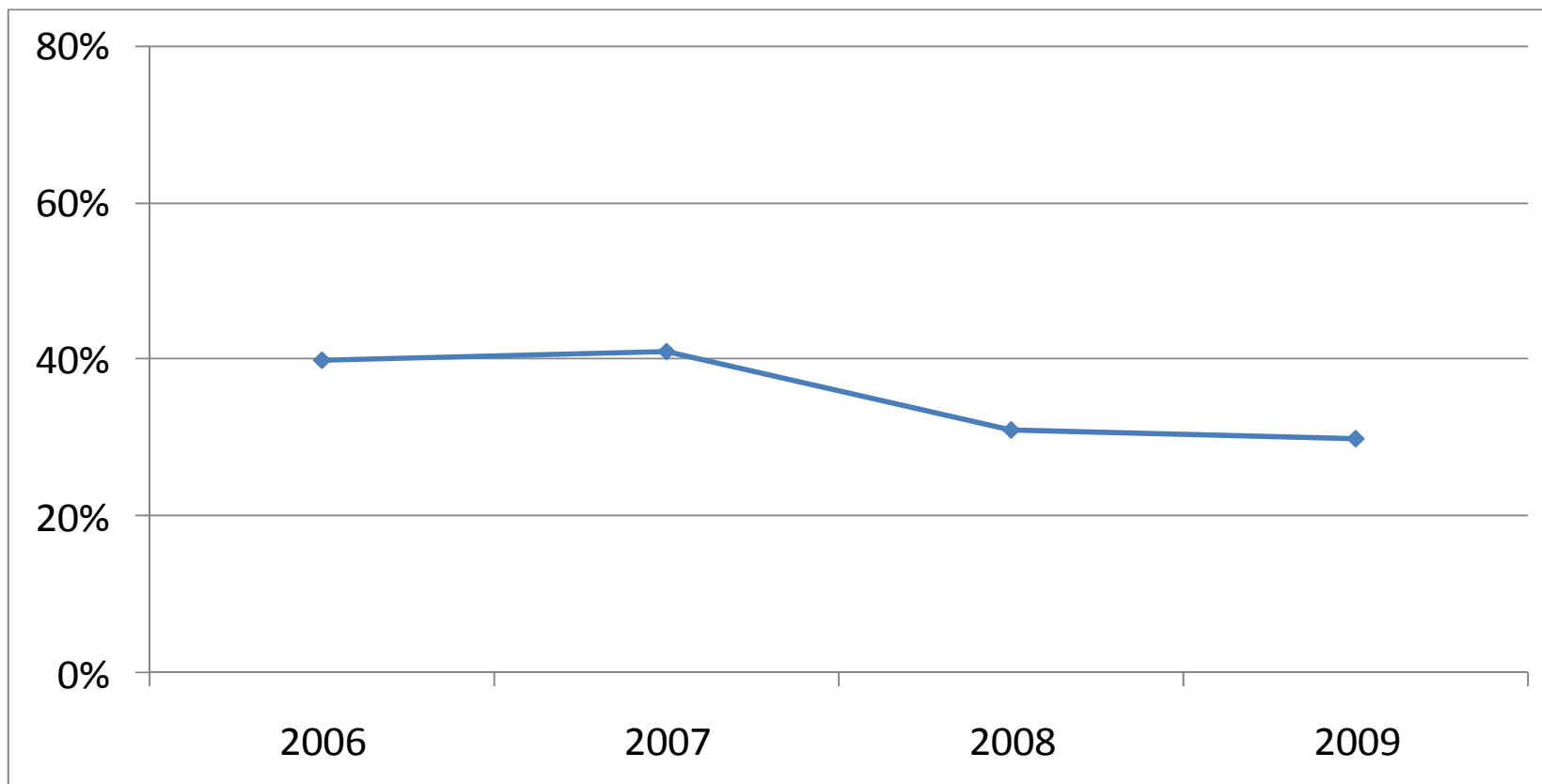


# Looking Forward... The Next Big Challenge

# Talent Management

Partnering with our talent management group to better select assignees; monitor assignment progress and plan for career upon return... we have introduced candidate assessment, assignment sponsors, and plans for repatriation... more focus on career planning and returns; 100% of expats must have a job to return to; any assignee returning from assignment with no clear job to return to at six months out is escalated to the global management board...

## Percentage of Employers Having Difficulty Filling Jobs Globally



# Workforce Demographics



# The Top 10 Jobs Employers are Having Difficulty Filling Across 33 Countries

1. Skilled Trades
2. Sales Representatives
3. Technicians (production / operations, engineering or maintenance)
4. Engineers
5. Management / Executives
6. Accounting & Finance staff
7. Laborers
8. Production Operators
9. Secretaries, PAs, Administrative Assistants and Office Support
10. Drivers

## In Summary

- Although we are still feeling the impact of the global recession on international workforce mobility, the recovering economy will quickly reveal the growing global shortage of talent
- Workforce demographics, globalization and technology are converging to create an unprecedented demand for talent that will be critically disruptive for companies in the years to come
- There is an opportunity for international mobility to demonstrate greater strategic value by linking with talent management to attract, retain and mobilize talent to protect and grow our businesses



# Q & A