
Brain gain or drain? How shifts in international job search are accelerating global competition for talent

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Indeed Hiring Lab

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The Indeed Hiring Lab is an international team of economists, researchers and data scientists dedicated to delivering insights that help drive the global labour market conversation.

The Hiring Lab produces research on global labour market topics using Indeed's proprietary data, survey data and publicly available sources. Our research is available to media, researchers, policymakers, jobseekers and employers to help them understand the world of work.

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Introduction

The pandemic has had a tremendous impact on the movement of people and goods across borders. Yet, unlike international trade, which is still crippled by supply chain disruptions, the movement of people across borders is showing surprising resilience judging by the rapid rebound in cross-border job search on Indeed's platform in 2022. Against all odds, the activity of internationally mobile jobseekers is on the verge of returning to pre-crisis levels. Businesses should understand this development as they think about recruitment and officials must take it into account when setting economic policy.

Jobseeker mobility could even reach new heights on the back of powerful long-term forces, such as digitisation and the ageing of the workforce, which change the mix of skills employers need and the availability of workers. Coupled with geopolitical shocks — such as Brexit, war in Ukraine and political turmoil in Hong Kong — these transformations are game changers for the European labour market. Some countries are already taking advantage of increased international job search and mobility to fill gaps in domestic labour supply. For their part, businesses find themselves competing for talent ever more intensively in a global marketplace in which traditional boundaries have fallen away.

Our report — which leverages timely and unique data from hundreds of millions of job searches and postings on Indeed — shows that the remote work revolution and widespread labour shortages brought about by the pandemic are likely to fuel cross-border mobility across all segments of the workforce. Well-prepared employers can position themselves to take advantage of this transformation. This report provides an inventory of innovative practices that can guide recruiters and help employers navigate through the opportunities and challenges of post-pandemic European labour markets.





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About this report

Migration is a permanent feature of European society. For example, over 8% of the nearly 450 million residents of the European Union were born outside its borders. In the UK, the foreign-born population is estimated to be as high as 14%, rising to 37% in London. Migration is a controversial subject all over the world but the ability of labour to move across borders is vital for the smooth functioning of the labour market.

The Covid-19 pandemic temporarily changed the migration picture by halting international travel and plunging the world into an economic crisis. Public health restrictions made it difficult

for many people to move to another country for work, while job opportunities became scarce. But the pandemic is now ebbing, raising important and timely questions:

- What do current cross-border job search patterns suggest for the future of international migration in Europe?
- How are post-pandemic labour shortages, the rise of remote jobs and geopolitical instability transforming job search by making it feasible for a significant share of the labour force to work anywhere in the world?
- Which countries stand to benefit?
- What can employers do to tap into the burgeoning pool of global talent?

To answer these questions, we use unique, timely data on job search and job postings from Indeed's global platform, complemented with recent surveys and the latest official statistics on migration. One advantage of Indeed's job search data is its worldwide reach, enabling us to obtain not only local or country-level data, but also to illuminate broad pan-European and global labour market trends. Another advantage is that online job search is highly correlated with migration. The scale, timeliness and relevance of the data help shed light on possible drivers of work-related international migration and project future migration flows after the pandemic.

Indeed's platform provides the largest dataset of its kind, including anonymised information on over 800 million cross-border job searches carried out between January 2019 and April 2022, and over 100 million job postings. In addition, this report uses data from surveys of employers and workers that Indeed Hiring Lab commissioned in eight countries in March 2022.

Our focus is on 32 countries in Europe, consisting of the European Economic Area, Switzerland and the UK. References to Europe and European jobseekers throughout the report are based on this group of countries, which together cover a large portion of the European continent.

MAIN FINDINGS

Rebound in cross-border job search

Cross-border job search has **rebounded** from its pandemic low. This suggests substantial potential for **new inflows of migrant workers** to the most attractive European labour markets as the pandemic recedes.

- **Europeans:** European jobseekers are increasingly looking for work outside their home countries, both within and outside Europe. Cross-border searches by European jobseekers are still **10% under** their 2017-19 average, but they are up substantially from the pandemic low of 32% below that level. [See page 22.](#)
- **Non-Europeans:** Jobseekers based outside Europe are increasingly looking in. Inbound searches from outside Europe are **38% above** the 2017-19 average, up from the pandemic low of 31% below. [See page 24.](#)

What drives cross-border mobility?

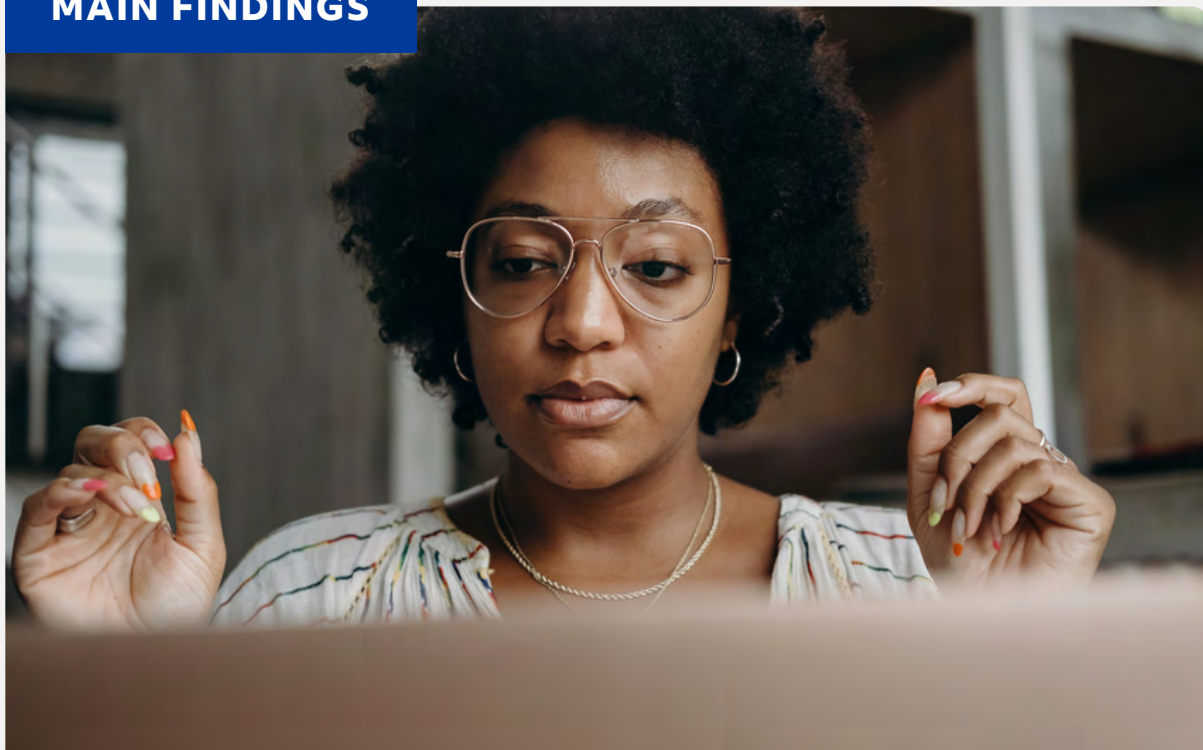
The rebound in cross-border job search is driven by a host of factors. Some, such as skills and pay, were already strong drivers before the pandemic. Others, such as the rise of remote work, labour shortages and geopolitics are stronger than before.

- **Higher pay:** Postings in **highly paid occupations** — such as management, business, finance and professional services, which tend to require high skills and qualifications — attract around **twice** as many foreign jobseekers as other jobs. This means that employers offering those jobs can tap into a global labour pool, which calls for a talent acquisition and employer branding strategy. [See page 26.](#)
- **Remote work:** In France, Germany and the UK — the three largest European economies and magnets for economic migration — foreign jobseekers are around **two to three times more likely** than domestic jobseekers to search and apply for **remote jobs**. This suggests jobs that can be performed remotely have the potential to attract a global pool of workers. [See page 30.](#)



- **Labour shortages:** For occupations with jobs that are **hard to fill** — such as nursing, medicine, engineering, construction and tech — foreign jobseekers are also more common. They are often the only option available when domestic workers are in short supply or lack the skills needed for these jobs. [See page 32.](#)
- **Geopolitics:** Non-economic factors also affect European labour markets. Job search patterns consistently capture reactions to **geopolitical events**, such as political turmoil in Hong Kong or the war in Ukraine. Use of the new Ukrainian language version of Indeed's site in Poland — which has received more Ukrainian refugees than any other country — increased rapidly from zero to around 1.5% of all job searches in Poland by late March. [See page 36.](#)

MAIN FINDINGS



Which countries are most attractive to international jobseekers?

High-income countries attract most jobseekers. In addition, countries where job postings have rebounded most rapidly from the pandemic, suggesting a **stronger labour market**, have tended to move up the attractiveness ranking in the past two years.

- **Most attractive destinations:** We measure the attractiveness of labour markets to internationally mobile jobseekers with a **net interest score** that considers each country's importance as a destination among jobseekers based in other countries, as well as the propensity of jobseekers based in that country to search abroad. **Luxembourg, Switzerland, the UK, Germany and Ireland** have the highest excess of inbound over outbound job search and therefore lead our ranking. These countries are the most likely **destinations** for net work-related migration in Europe in the near future. The UK continues to rank highly despite the post-Brexit decline in interest in British jobs from EU-based candidates. [See page 44.](#)

Most attractive countries for international jobseekers

1. Luxembourg
2. Switzerland
3. United Kingdom
4. Germany
5. Ireland
6. Netherlands
7. France
8. Belgium
9. Spain
10. Portugal

Source: Indeed

- **Labour market strength:** Countries where the labour market is recovering faster from the pandemic as measured by job postings on Indeed — including Denmark, Luxembourg and the UK — have **improved their net interest scores** in part because domestic jobseekers have become less likely to search for jobs abroad. Countries such as Belgium, the Czech Republic and Spain, where labour markets are recovering more slowly, are among those where the net interest score has fallen most. Countries with the lowest net interest scores — like Romania, Greece, Finland and Hungary — appear most likely to be **sources of economic migration** on the continent in the coming months. [See page 47.](#)

MAIN FINDINGS



How are businesses thinking about hiring foreign workers?

- **Hiring plans:** Employers and workers are **preparing** for a rebound in migration. Our survey of employers in eight countries shows that 64% of businesses will “definitely” or “probably” hire foreign workers in 2022. [See page 52.](#)
- **Motivation:** According to our surveys, **labour shortages** are the leading motivation for hiring foreign staff, followed by the need to bring in **foreign language skills** and the desire to take advantage of the **qualifications** of foreign candidates. [See page 54.](#)
- **Strategies:** Many employers are taking concrete steps to attract foreign candidates, such as **advertising jobs in other countries**, posting job ads in multiple **languages** and hiring foreign recruitment agencies or in-house recruiters with foreign language skills. [See page 58.](#)

What are the takeaways for employers?

- **Prepare:** Get ready for the expected inflow of foreign candidates by understanding where they are coming from and what jobs they are interested in.
- **Worker shortages:** Remote, high-paying and hard-to-fill roles tend to receive high shares of clicks from overseas, indicating employers facing labour shortages should craft strategies to attract those jobseekers.
- **Strategies:** To access the global talent pool in today’s tight labour market, many businesses are taking specific steps to reach foreign workers, such as posting jobs abroad, hiring recruiters with foreign language skills, taking advantage of government schemes or writing job descriptions in multiple languages.
- **Refugees:** Workers fleeing armed conflict or persecution can be a rich source of talent, often needing jobs more urgently than average jobseekers, which means employers may be able to find staff by considering the wide range of skills and backgrounds these candidates offer.
- **Languages:** Employers can better tap into the global talent pool by assessing the language requirements of different jobs and helping foreign staff improve their language and cultural communication skills.
- **Retention:** A focus on retention is essential given the risk of brain drain as cross-border search picks up, which means keeping an eye on the needs of the workforce, knowing the salaries and working conditions competitors offer, and adapting accordingly.

The remainder of this report delves deeper into these trends. Additionally, the appendix contains country profiles for **Europe’s 12 largest economies** — Austria, Belgium, France, Germany, Ireland, Italy, Netherlands, Poland, Spain, Sweden, Switzerland and the UK — with data on the contributions of foreign jobseekers in each labour market based on cross-border job search patterns.

1. Cross-border mobility is bouncing back from the pandemic

International job search is a useful indicator of jobseeker interest in moving across borders. It's [correlated with actual migration patterns](#) and available with a much shorter lag than official statistics on work-related migration.

For most of the past two years, the pandemic and related restrictions on international travel and mobility made it difficult to move to another country for a job. The result was a decline in international job search as well as a [fall in international migration](#).

Now that the pandemic is receding, has cross-border mobility recovered? If so, what would this mean for post-pandemic mobility and future migration patterns? And what would be the implications for the European labour market, worker shortages and recruitment? Job search trends on Indeed provide important clues.

Migration is set to grow as limits on international travel ease and job search picks up

The pandemic prompted governments to introduce a wide range of public health restrictions starting in early 2020, including strict limits on international travel. According to the [Oxford COVID-19 Government Response Tracker](#), peak travel restrictions in Europe ranged from total border closures and bans on arrivals from certain regions (Figure 1).

Those restrictions started to ease in the second half of 2021. This trend accelerated in early 2022, with some countries completely [removing travel restrictions](#), enabling [more people to travel](#) than during most of the pandemic, thus reducing the barriers to international migration.

Figure 1 - Restrictions on international travel have eased across Europe

7-day average across EEA countries, Switzerland & UK to 15 May 2022



4=Total border closure
3=Ban on arrivals from some regions
2=Quarantining arrivals from high-risk regions
1=Screening
0=No measures

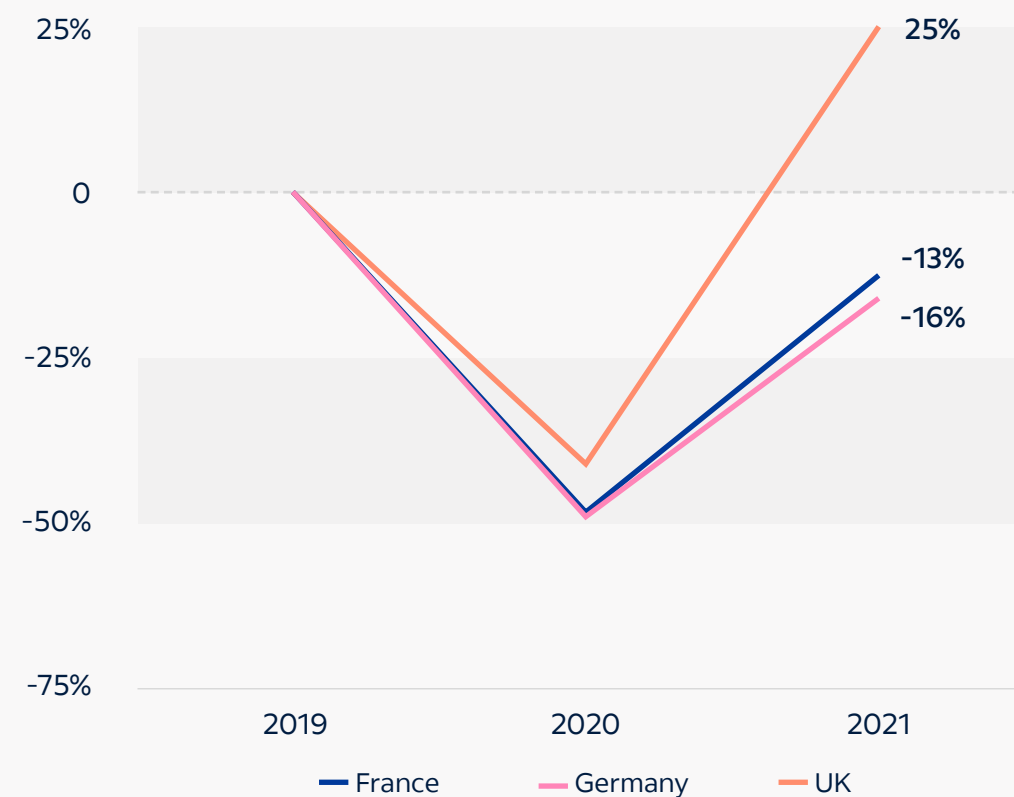
Source: Oxford Covid-19 Government Response Tracker

As travel restrictions eased, work-related migration flows started to recover. Data from Europe's largest economies shows issuance of work-related visas bounced back from pandemic lows in 2021 (Figure 2). While 2021 work visa issuance was still 13% and 16% below

2019 levels in France and Germany respectively, this represented substantial improvements from the almost 50% drop in 2020. The reversal was even more dramatic in the UK, with its [new post-Brexit immigration rules](#), where total work visa issuance soared to 25% above 2019 levels in 2021.

Figure 2 - Issuance of work-related visas has started to recover in the largest European economies

Change since 2019 (%)



Source: Ministry of the Interior (France), Federal Foreign Office (Germany), Home Office (UK)
France and Germany: long-term work-related visas, UK: all work-related visas

More timely job search data show jobseeker interest in moving for work continues to rise, suggesting work-related migration will recover further in 2022, barring unexpected

developments on the public health or geopolitical fronts. The Ukraine war is a case in point. We discuss its impact in Section 2.

Europeans are searching for jobs outside their home countries again

As public health restrictions eased, cross-border job search in Europe rebounded. We see this rebound in both directions. On the one hand, Europeans are increasingly searching for jobs outside their home countries, both within Europe and out. On the other hand, jobseekers outside Europe are increasingly searching for jobs in Europe. This suggests pent-up demand for moving across borders for work, which may make recruitment easier for employers in

Cross-border search fell 32% below its 2017-2019 average during the pandemic and stayed low during most of 2020 and the first half of 2021.

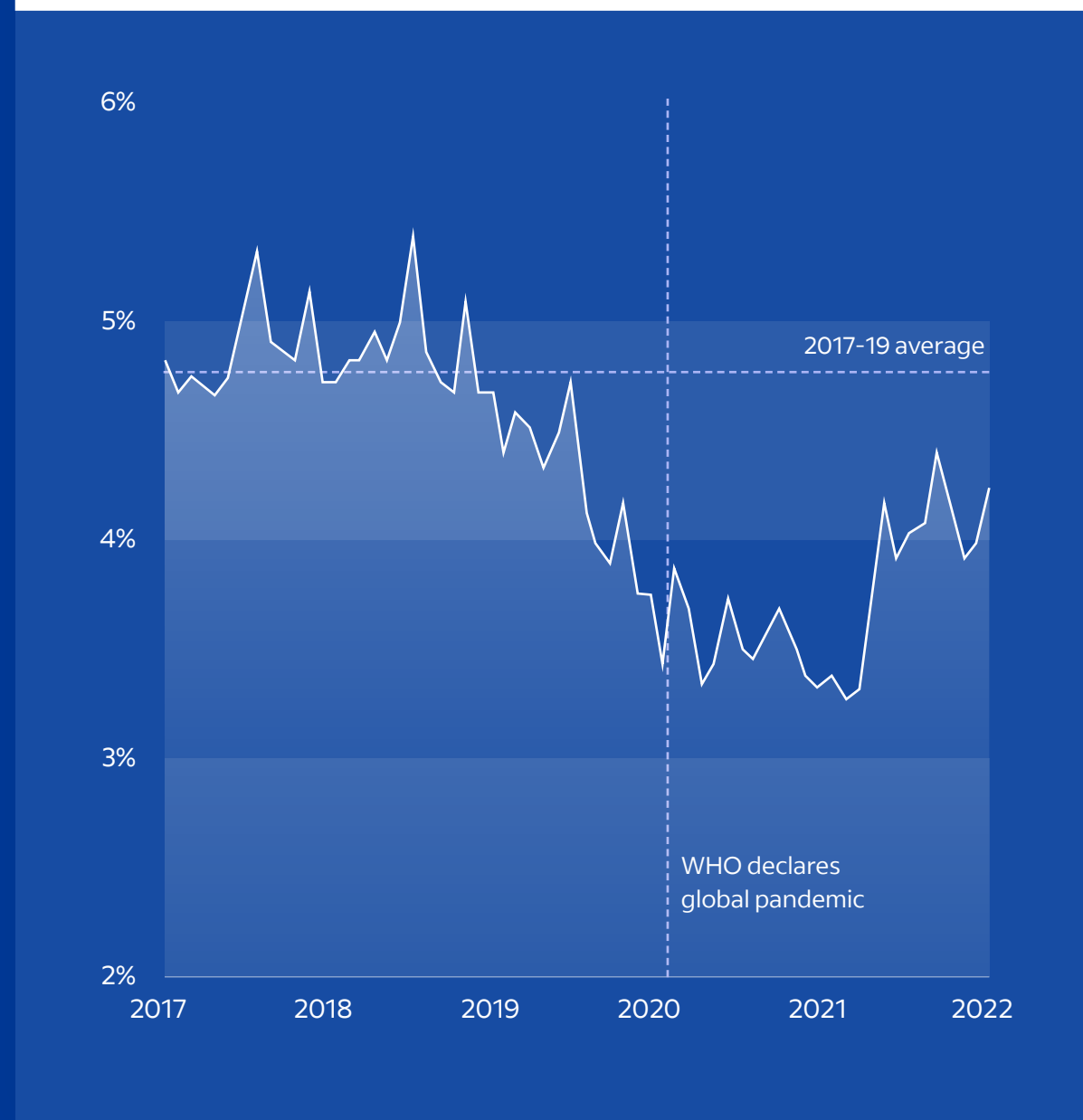
countries and sectors that rely on migrant workers. To analyse trends in international job search in Europe, we calculated the monthly share of all searches by jobseekers with IP addresses in the European Economic Area, Switzerland or the UK who searched on an Indeed site in another country. We excluded countries without an Indeed site — such as Bulgaria, Croatia, Cyprus, Estonia, Lithuania, Latvia, Malta, Slovenia and Slovakia. By definition, all searches on Indeed by users located in those countries are cross-border. We used anonymised information on over 800 million cross-border job searches carried out on Indeed between January 2019 and April 2022.

European jobseekers ramped up searches for overseas jobs in the second half of 2021 after over a year of below-average international job search activity (*Figure 3*). Before 2019, the trend was flat, with a gradual decline that year, perhaps because tight labour markets created lots of opportunities in jobseekers' home countries. Then, as the pandemic gripped Europe, cross-border search fell 32% below its 2017-19 average, staying low during most of 2020 and the first half of 2021. Since then, searches have rebounded. While they were still 10% below the 2017-2019 average as of April 2022, the recent rise indicates growing numbers of jobseekers are moving or thinking about moving for work.

When Europeans look for jobs outside their home countries, they tend to search mainly within Europe. But other parts of the world are frequent destinations too. From January to April 2022, Europe was the destination for 62% of cross-border searches by Europeans, followed by North America (26%), Asia (8%), Oceania (2%), Africa (1%) and South America (0.6%). Antarctica came last with a share of just 0.01%. [Jobs in Antarctica](#) are mainly technical roles at polar stations.

Figure 3 - Europeans are searching for jobs outside their home countries again

Searches for jobs in another country as a share of all searches by European jobseekers on Indeed to April 2022



Source: Indeed
Europe defined as the European Economic Area, Switzerland and the UK

Europe is also increasingly a destination for jobseekers from outside the continent

It's not just Europeans who have been searching more for jobs in other countries. Jobseekers outside Europe have also been searching more actively for work on the continent.

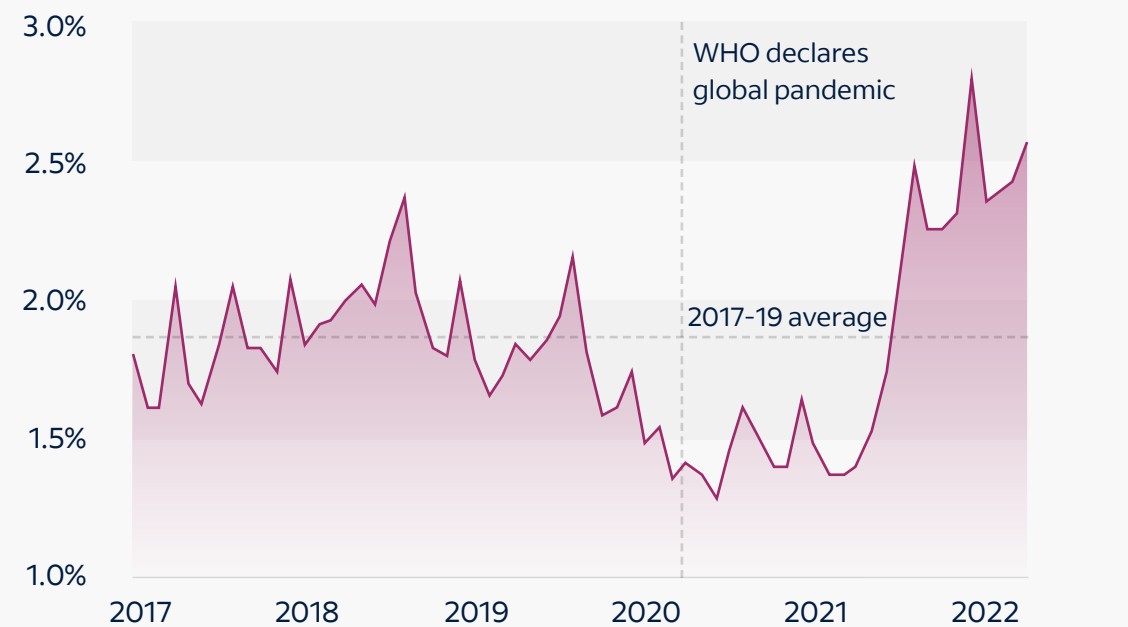
We analysed the inbound trend by looking at the monthly share of searches for European jobs coming from outside the region. During

2020, the share fell as low as 31% below the 2017-2019 average. But in April 2022, it rebounded to 38% above the 2017-2019 average (Figure 4). This suggests substantial pent-up demand for moving to Europe for work. For employers, this means access to global talent and a need to manage the practical challenges involved in hiring non-European citizens.



Figure 4 - Interest in European jobs from outside Europe has risen

Searches from outside Europe as a share of all searches for European jobs on Indeed to April 2022



Source: Indeed
Europe defined as the European Economic Area, Switzerland and the UK

Jobseekers outside Europe have been searching more actively for work on the continent.

The biggest contribution to the recent rebound came from jobseekers in the United States, India, Nigeria, Turkey and the United Arab Emirates. The country profiles at the end

of this report contain more details about the countries of origin of jobseekers looking for work in selected large European countries.

Biggest contributors to the recent rebound in searches for jobs in Europe

1. United States
2. India
3. Nigeria
4. Turkey
5. United Arab Emirates
6. Canada
7. Pakistan
8. Brazil
9. Tunisia
10. Hong Kong

Source: Indeed

High-paying jobs in management, business, finance and professional services fuel cross-border mobility

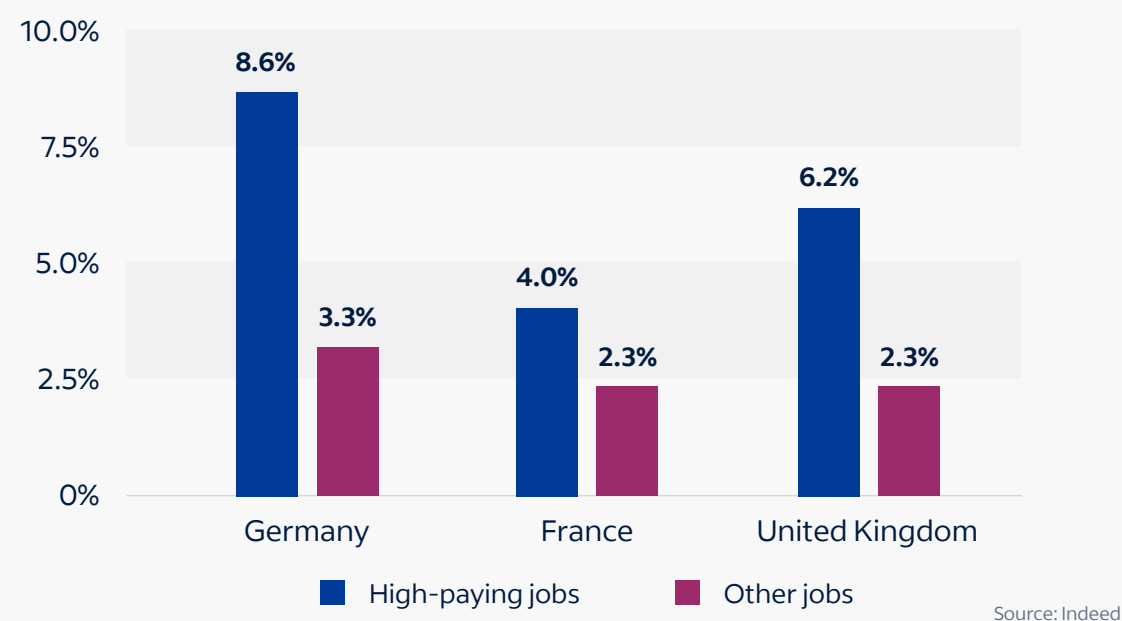
International jobseekers show greater interest in some jobs than others. Job postings in management, business, finance and professional services attract higher shares of candidates from abroad than other jobs. These broad categories include jobs in banking and finance, engineering, tech and healthcare. In France, Germany and the UK from January 2019 to April 2022, foreign clicks as a share of total clicks were more than two times higher in these categories than in all jobs: 5.6% versus 2.5%

on average. This means employers hiring for those white-collar jobs generally find it easier to recruit candidates outside the country than employers trying to fill other jobs.

There are differences among countries, however. *Figure 5* shows in Germany the share of foreign clicks on jobs in these white-collar occupations was 8.6%, higher than in France (4.0%) or the UK (6.2%). French employers thus appear more reliant on domestic jobseekers than British or German employers.

Figure 5 - High-paying jobs attract foreign jobseekers

Clicks by foreign jobseekers as a share of all clicks on Indeed in France, Germany and the UK, high-paying jobs vs. other jobs



Importantly, jobs in these white-collar occupations with high shares of clicks by foreign jobseekers offer high pay. In the three countries we looked at, in the first quarter of 2022, jobs in professional and related occupations advertised a median annual salary of over €41,600, while management, business

and finance jobs advertised a median annual salary of €36,500 (*Figure 6*). There was a sizable gap with other occupations. The next-best-paying category — sales and related occupations — advertised a median salary of around €32,000, or 12% less than management, business and finance.

Figure 6 - Salaries vary widely across job categories

Median advertised annual salary by occupational group in France, Germany and the UK in Q1 2022

Occupational groups	Median salary in EUR
1. Professional and related occupations	41,645
2. Management, business, and financial operations occupations	36,500
3. Sales and related occupations	32,110
4. Installation, maintenance, and repair occupations	30,558
5. Construction and extraction occupations (plus other resources)	30,000
6. Production occupations	28,023
7. Transportation and material moving occupations	28,023
8. Service occupations	28,023
9. Office and administrative support occupations	25,688

Source: Indeed

Surveys consistently suggest that [salary is key](#) in the decision to accept a job offer. Other things being equal, the better the pay a job offers, the more candidates will apply.

Nevertheless, as we show in the following section, factors outside the pay/skills mix developed during the pandemic may further fuel cross-border mobility.

2. Remote work, labour shortages and geopolitics are catalysts for the future of cross-border mobility

Pay and skills are perennial issues in the European labour market conversation. Now, though, employers must also consider an additional set of questions, including remote work, labour shortages and geopolitics. The importance of these factors has been dramatically amplified during the pandemic. Data from France, Germany and the UK show these factors are associated with higher cross-border mobility.

Foreign jobseekers are keen on remote jobs

The pandemic boosted remote work all across Europe. Joint research by Indeed and the OECD shows [remote job postings surged](#) dramatically during the pandemic in almost all large industrialised countries and remain high in 2022, especially in occupations for which remote work is easy to implement. [Searches for remote jobs are also](#) above historical levels. Both employers and candidates continue to express keen interest in remote work.

In France, Germany and the UK, foreign jobseekers are much more likely to search for remote jobs than domestic jobseekers.

Because remote jobs can theoretically be done from anywhere, they are a particular draw for foreign jobseekers. Recent data show evidence of this: in France, Germany and the UK, the foreign

jobseeker share of searches for remote jobs is higher than for all jobs (*Figure 7*). We define searches for remote jobs as those that contain keywords related to remote work, such as “remote” or “work from home”. On average from January 2019 to April 2022, foreign jobseekers were nearly 2.6 times more likely to search for remote jobs in France than domestic jobseekers, nearly 1.9 times more likely in the UK and 1.7 times more likely in Germany. Job applications follow a similar pattern, showing that foreign jobseeker interest in remote jobs is genuine.

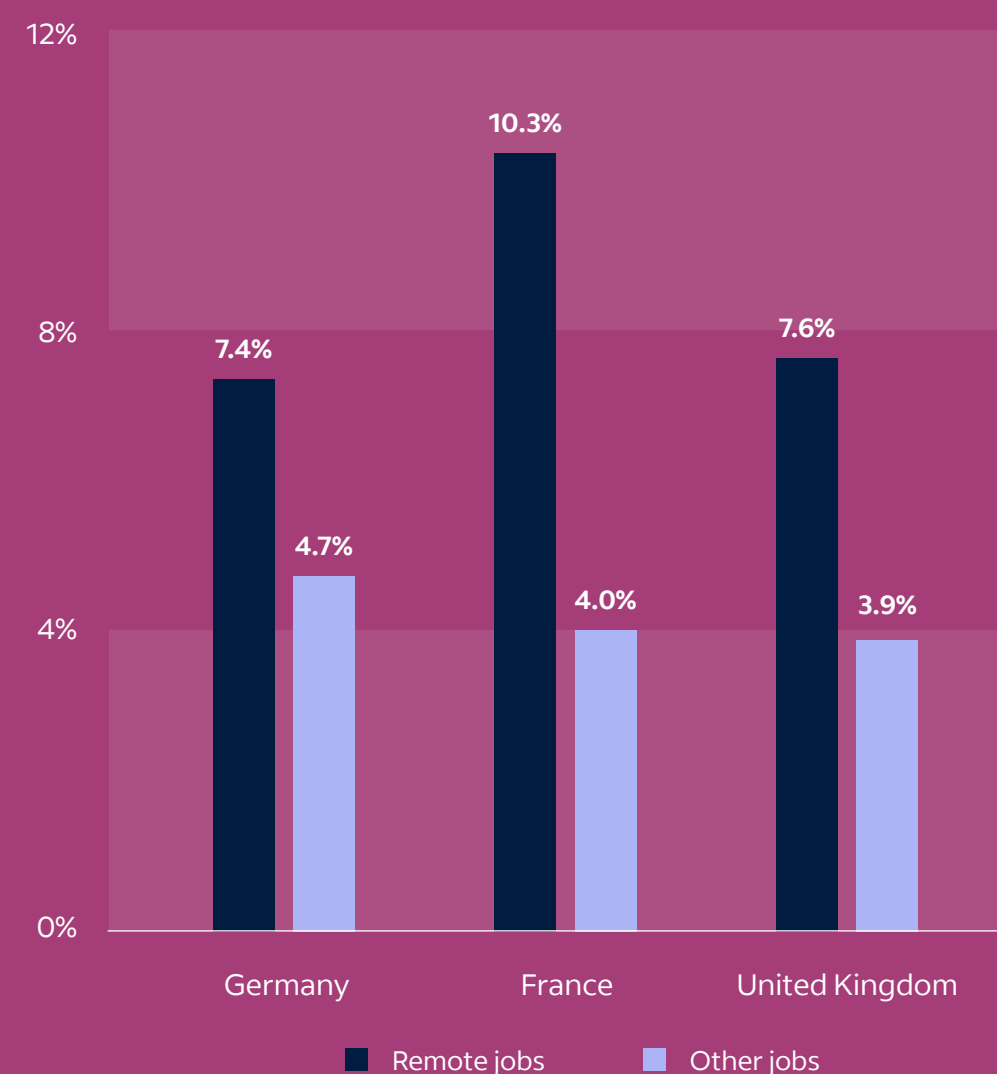
Remote work is one of the drivers of cross-border mobility in that it encourages foreign jobseekers to look in labour markets other than those of their home countries. Moreover, in France and Germany, the trend has been up. Foreign jobseekers have increasingly been drawn to remote jobs, thanks to a big boost when the pandemic struck Europe in the first half of 2020. In both countries, foreign jobseeker interest has fallen from pandemic peaks but remains higher than in 2019.

By contrast, the trend in foreign jobseekers’ relative interest in remote jobs has been negative in the UK since the onset of the pandemic. It is possible that Brexit and the changes to immigration rules altered the composition of the foreign jobseeker pool. However, foreign jobseekers are still more likely to search for remote jobs in the UK than their domestic counterparts.

Does this mean British, French and German employers will increasingly offshore jobs that can be performed remotely? In practice, factors such as regulation, cultural differences, local knowledge, language and time zone conflicts can be powerful barriers to hiring remote workers in other countries. But, as more global companies let employees work anywhere, resources to help employers deal with the legal, tax and HR aspects of managing a global remote workforce are proliferating. Job search patterns suggest that, as these obstacles are overcome, positions that offer remote work have substantial potential to attract a global pool of candidates.

Figure 7 - Foreign jobseekers represent a high share of searches for remote jobs

Searches by foreign jobseekers as a share of all searches on Indeed in France, Germany and the UK, remote jobs vs. all jobs



Source: Indeed

Hard-to-fill jobs get more clicks from foreign jobseekers than the average job

Labour shortages have been one factor slowing economic recovery after the pandemic. [Customer-facing jobs](#) have been among those with the greatest reported hiring difficulties. Even in normal times, labour shortages in specific sectors can significantly hamper

Some countries — notably Germany and post-Brexit UK — have immigration policies based on their perceived labour market needs.

economic activity. Foreign workers can help alleviate this problem. Some countries — notably Germany and post-Brexit UK — have immigration policies based on their perceived labour market needs, allowing

employers in certain sectors to hire foreign workers with the right skills.

One way to identify hard-to-fill jobs in France, Germany and the UK is to check which occupations have low numbers of clicks per job posting on the Indeed sites in these countries. The job categories that have low clicks per posting differ slightly across countries due to labour market variation. However, some categories are common in all three countries, including nursing, medicine, information design and documentation, and software development (*Figure 8*). The hard-to-fill mix in France is characterised by a higher share of jobs that pay relatively less well, such as construction, production and manufacturing, and installation and maintenance occupations. By contrast, many hard-to-fill jobs in the UK appear to require high qualifications (e.g. banking and finance, education & instruction, insurance, legal or management). Germany is in an intermediate position, with a mix of high skilled and less skilled occupations.

Figure 8 - Hard-to-fill job categories in France, Germany and the UK

Job category	Hard to fill	Remote compatible	High paying
Accounting	DE FR	✓	✓
Banking & Finance	DE UK	✓	✓
Construction	DE FR		
Education & Instruction	UK	✓	✓
Information Design & Documentation	DE FR UK	✓	✓
Installation & Maintenance	DE FR		
Insurance	DE UK	✓	✓
IT Operations & Helpdesk	DE FR	✓	✓
Legal	DE UK	✓	✓
Management	FR UK	✓	✓
Mechanical Engineering	DE UK	✓	✓
Nursing	DE FR UK		✓
Pharmacy	FR		
Physicians & Surgeons	DE FR UK		✓
Production & Manufacturing	FR		
Real Estate	UK	✓	✓
Software Development	DE FR UK	✓	✓
Therapy	FR UK		

Source: Indeed

As with remote jobs, hard-to-fill occupations are more likely to see interest from foreign jobseekers than other occupations.

Since the pandemic, hard-to-fill occupations are also more likely to pay high wages because employers have had to boost compensation to counter labour shortages. Many of these jobs are crucial to economic activity or to

the wellbeing of the population. Construction (in shortage in France and Germany) or nursing (in shortage in all three countries) are examples.

As with remote jobs, hard-to-fill occupations are more popular with foreign jobseekers than other occupations. Foreign jobseekers who search on Indeed's Germany or UK sites are respectively 2.6 and 2.5 times more likely to click on ads for hard-to-fill jobs than easier-to-fill jobs (Figure 9). The ratio is 1.5 times in France, where the unemployment rate is higher than in the other two countries, easing the general level of labour shortage.

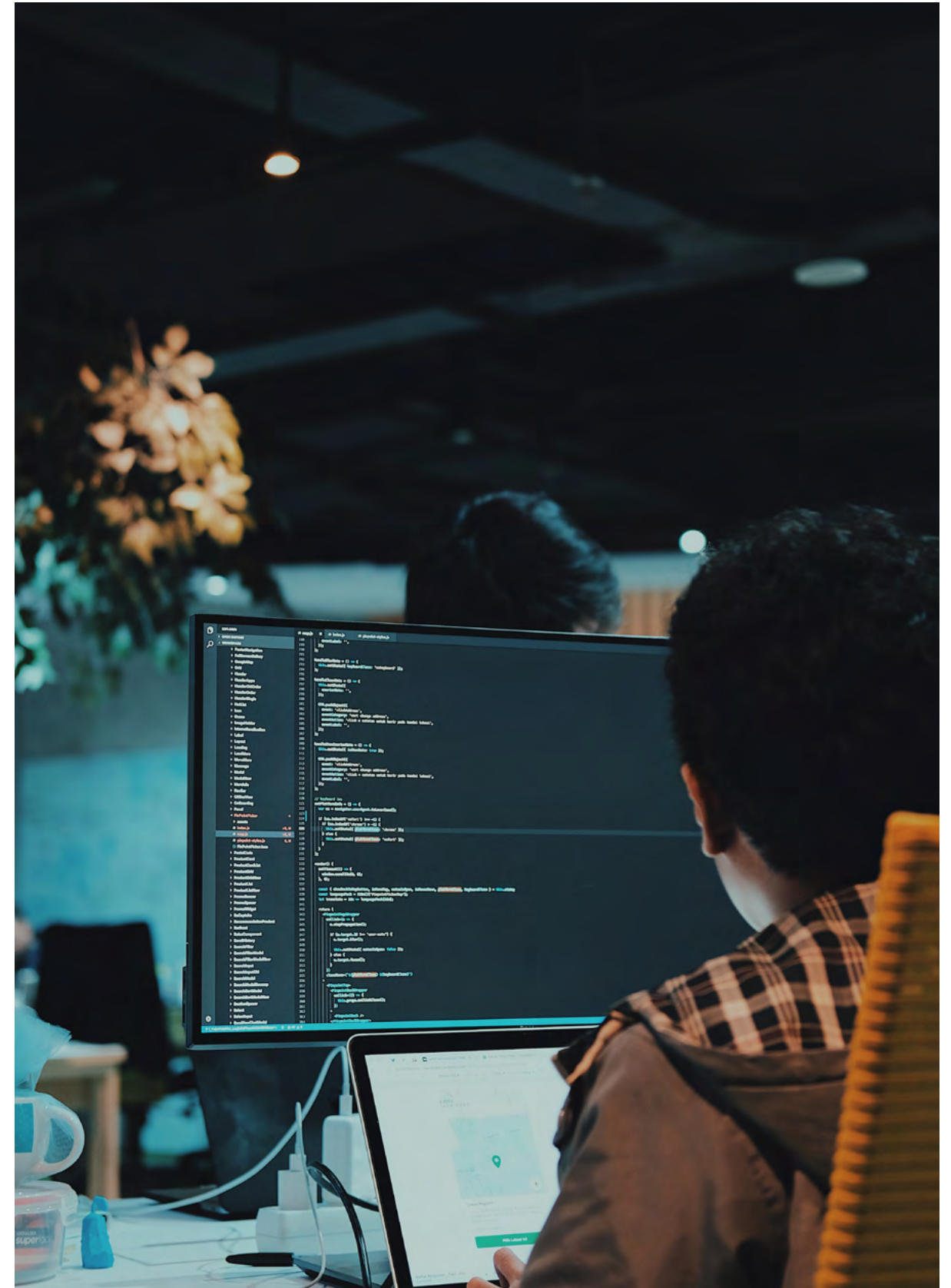
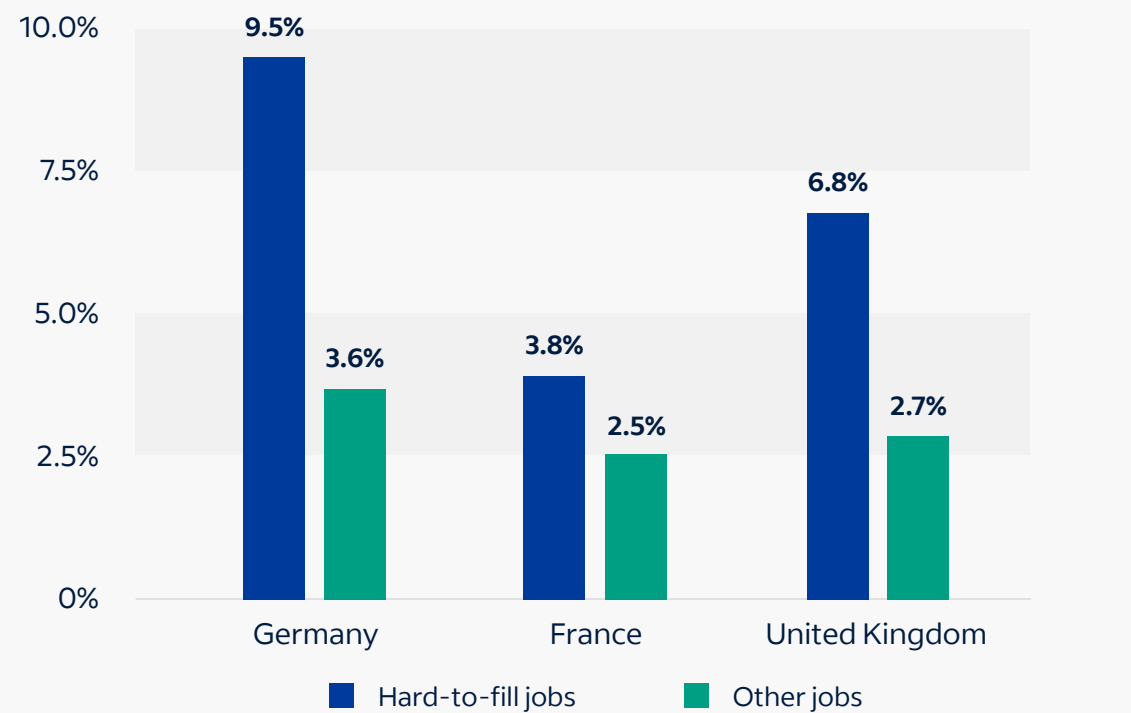


Figure 9 - Hard-to-fill jobs attract a high share of clicks from abroad

Clicks by foreign jobseekers as a share of all clicks on Indeed in France, Germany and the UK, jobs in hard-to-fill categories vs. other jobs



Geopolitical events are having an impact on job search and migration

Political turmoil, government policy changes and war shape people's decisions about where to live and work — even more than

While Covid-19 has been a defining economic influence over the past two years, geopolitical events are also influencing cross-border job search patterns.

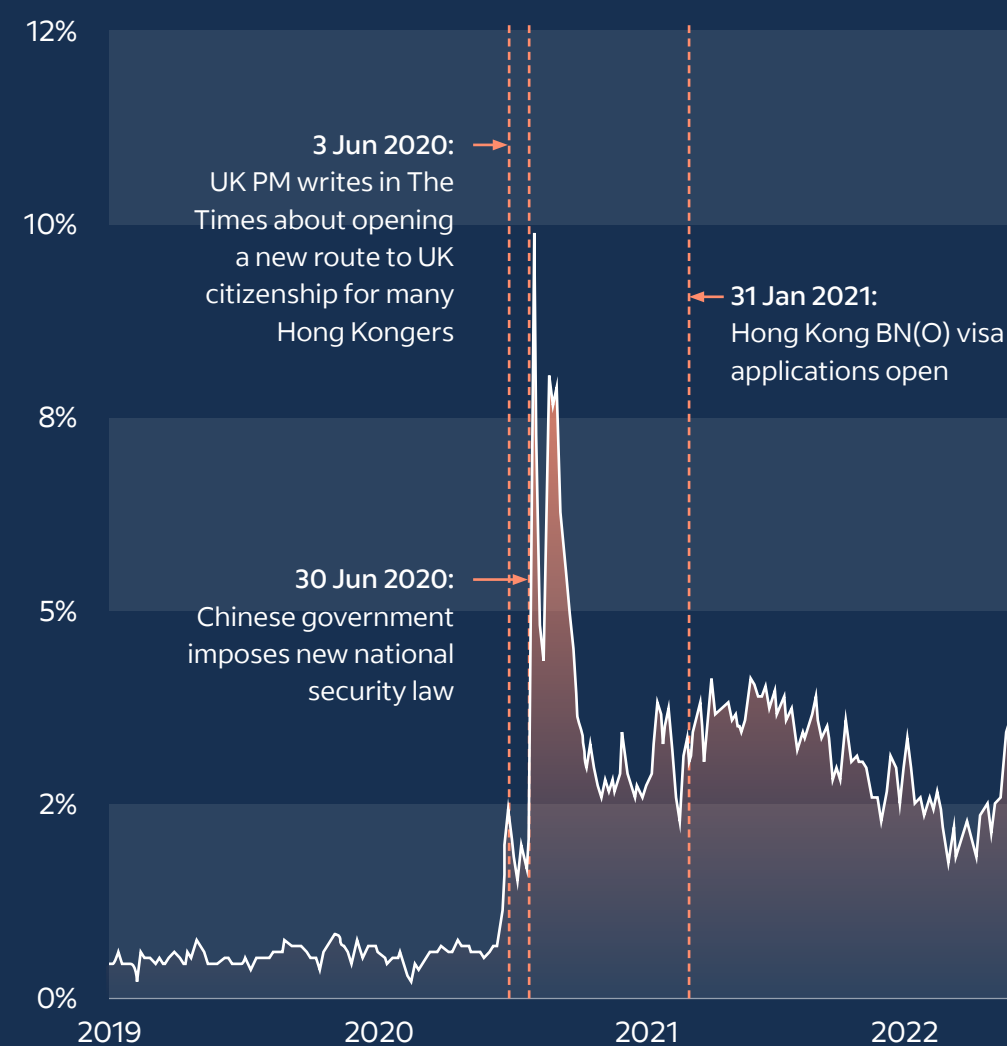
the condition of the labour market or opportunities to work remotely. While Covid-19 has been a defining economic influence over the past two years, geopolitical events are also influencing cross-border job search patterns.

For example, searches for UK jobs from Hong Kong have been high since July 2020, when the UK government offered a [special visa](#) and a route to citizenship to around three million residents of the special administrative region amid political protests against restrictions on civil liberties (*Figure 10*). In 2021, requests for admission under this status accounted for [around 5%](#) of total UK visa applications from overseas. They rose again after visa eligibility was expanded in February 2022.

People from Hong Kong are three-to-four times more likely to click on job postings for such occupations as software development, mechanical engineering and finance than the average jobseeker. Consequently, UK employers hiring for those occupations may benefit most from this new source of immigration.

Figure 10 - Searches for UK jobs from Hong Kong surged on policy change

Share of all searches from abroad on Indeed in the UK (%)



Source: Indeed

Impact of the war in Ukraine on international labour markets

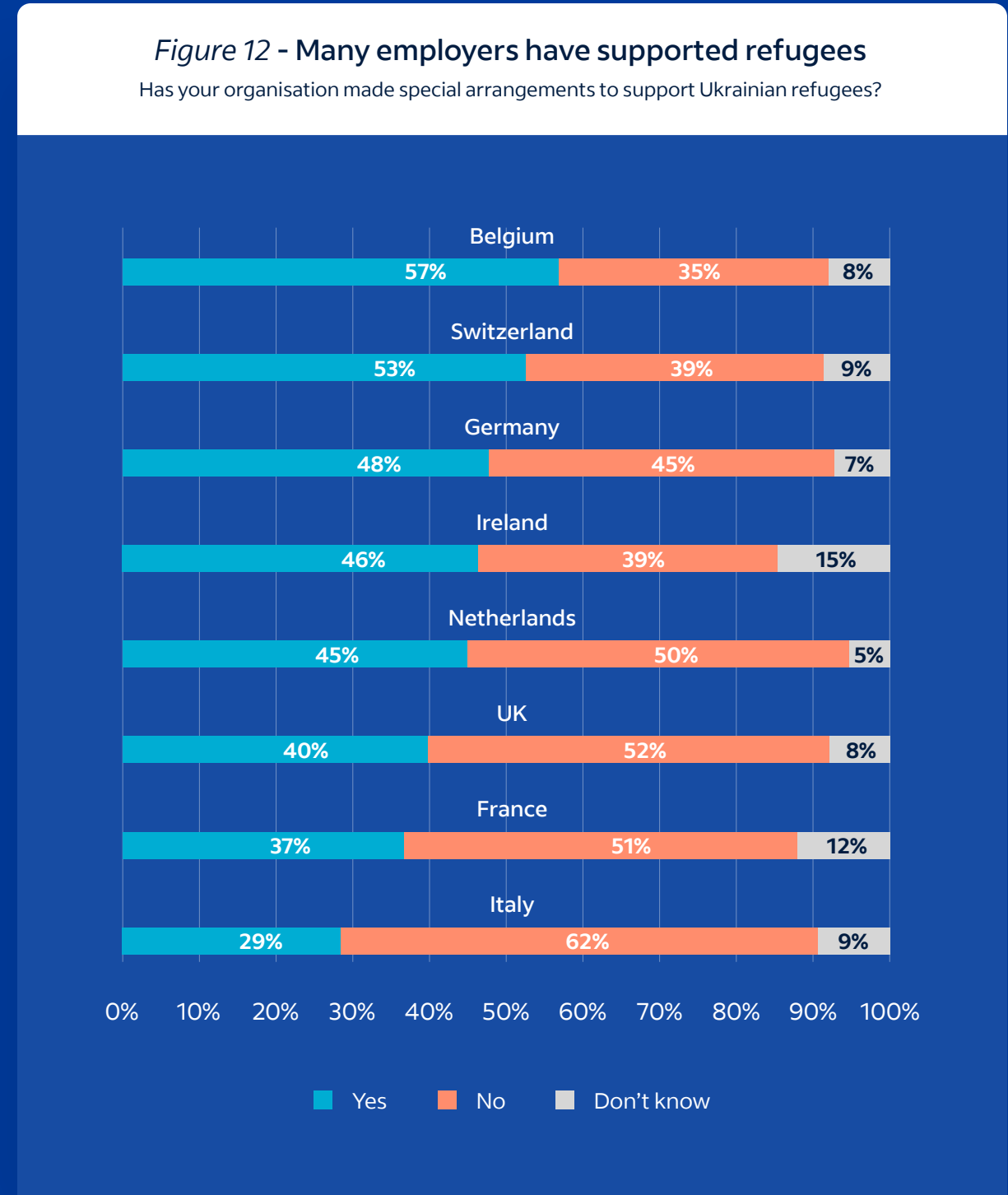
War and persecution also drive movements of people and can affect economies and labour markets. This year, [millions have fled the war in Ukraine](#). While many refugees are still on the move and preoccupied with satisfying basic needs like food, shelter and stability, the repercussions of the conflict are already visible

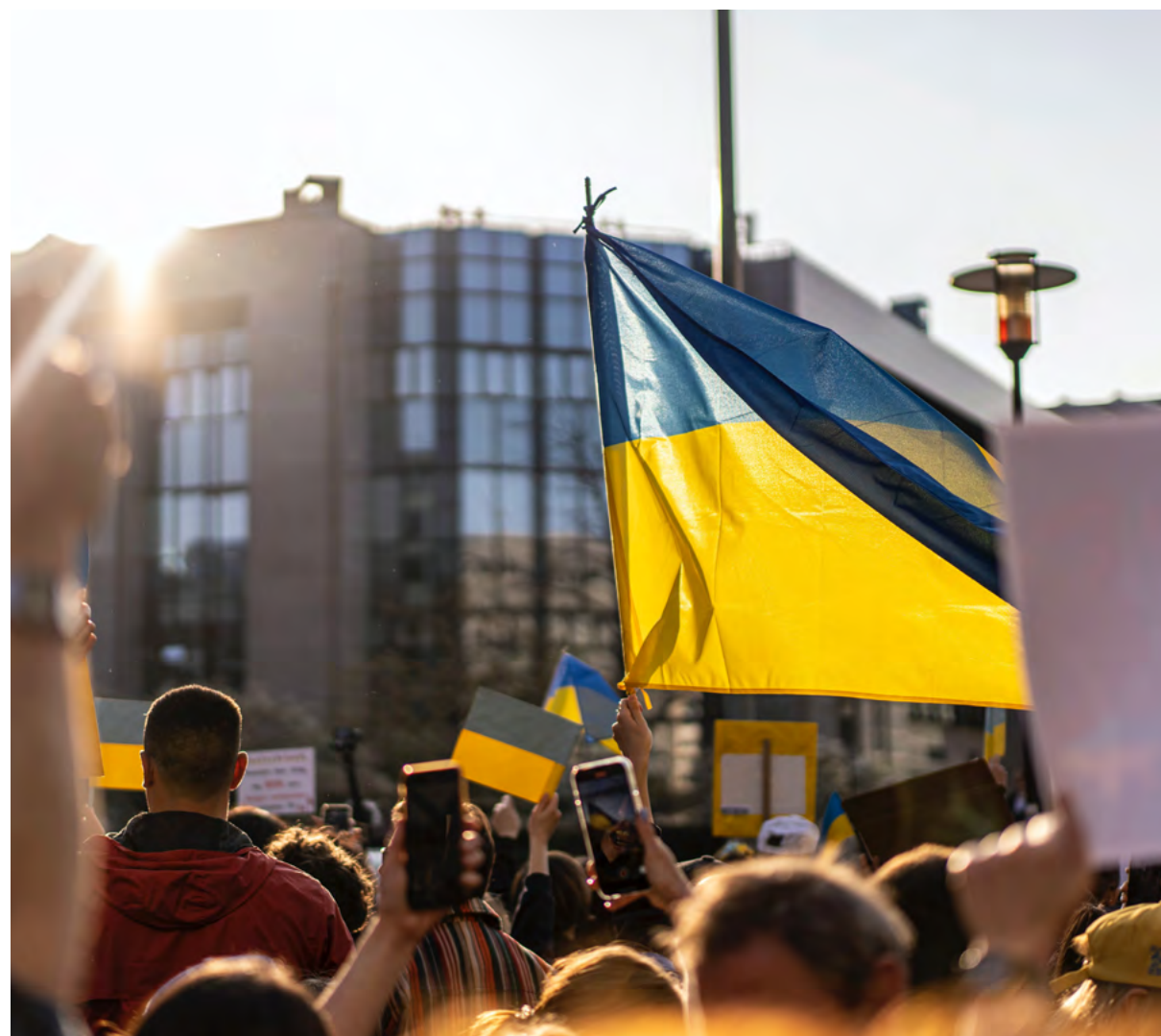
in job search patterns. For instance, use of the new [Ukrainian language version](#) of Indeed's site in Poland — the country that received more Ukrainian refugees than any other when the war started — increased rapidly from zero to a substantial share of around 1.5% of all job searches in the country by mid-March (Figure 11).



While it is not possible to determine whether jobseekers using the Ukrainian language version of the Indeed site are recent refugees or some of the [more than one million](#) Ukrainian nationals already living in Poland, the data suggest urgent, open-ended job search by people on the move. The most common search phrases are broad terms like “immediate start”, “work” and “Ukrainian workers”. In addition, over 92% of those searches are made from mobile devices compared with more than the 82% of Polish language searches.

The implications are important. Anywhere in Europe, employers interested in hiring Ukrainian refugees should be open to candidates with a wide range of skills and backgrounds. Moreover, these refugees may need jobs quickly and may consider all kinds of openings. At the same time, refugee workers looking urgently for income are vulnerable. Authorities should stay alert to ensure they are not exploited.



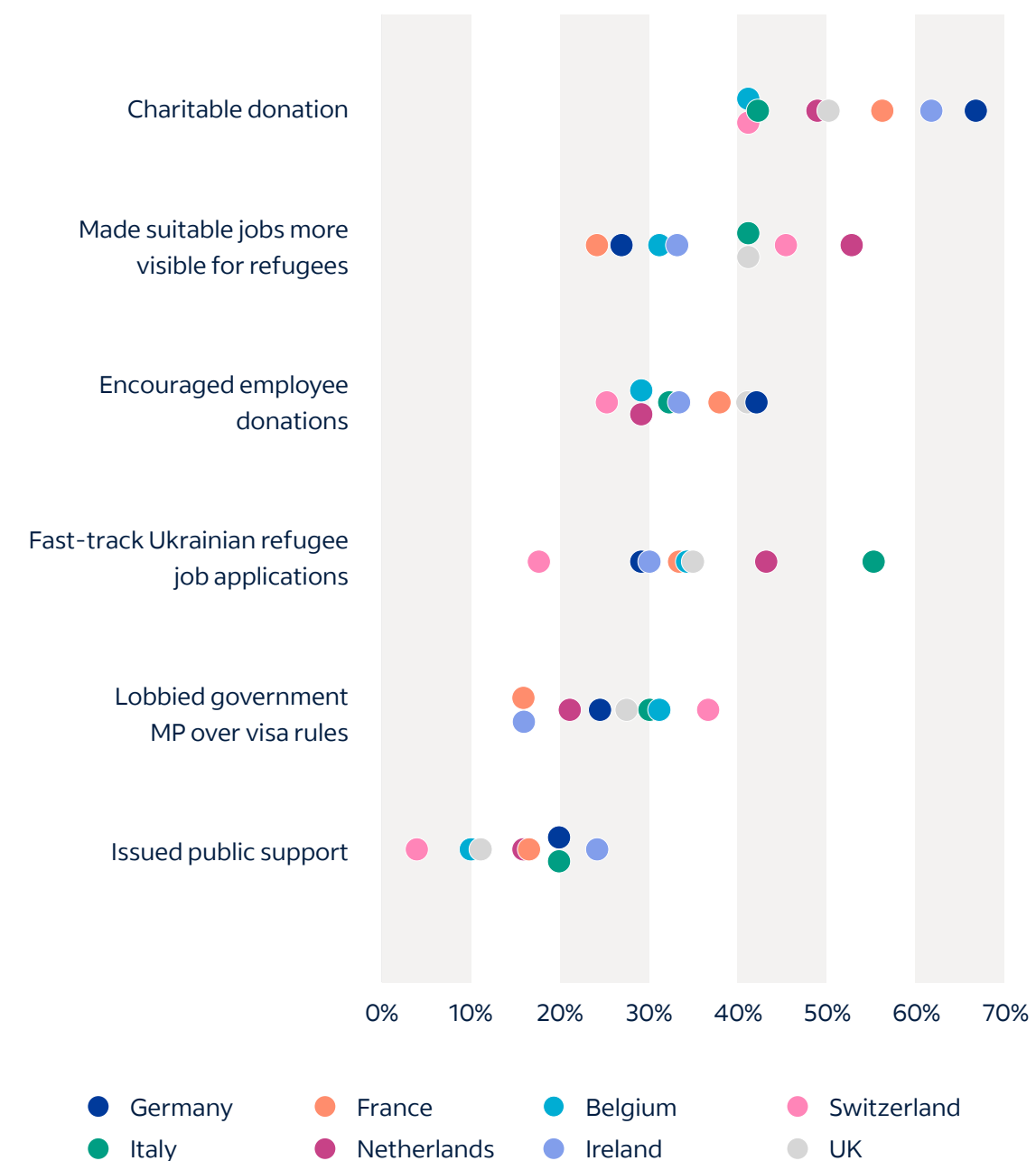


Our survey of employers in eight European countries shows a substantial proportion made special arrangements to support Ukrainian refugees. The share ranges from 29% of responding organisations in Italy to 57% in Belgium (*Figure 12*). Much of that support took the form of financial contributions (*Figure 13*). One of the most common actions was a charitable donation, ranging from 41% of employers who reported giving to charities in Belgium and Switzerland to 68% in Germany. Encouraging employee donations was also a common response.

Some employers made special recruitment efforts. These included making suitable jobs more visible to Ukrainian refugees (from 24% in France to 53% in the Netherlands) or fast-tracking job applications (from 18% in Switzerland to 55% in Italy). Some lobbied government or parliamentary representatives over visa rules. The survey suggests employers are working actively to open labour markets to Ukrainian refugees.

Figure 13 - Businesses have supported refugees in multiple ways

How has your organisation supported Ukrainian refugees?



Note: Other/Not sure not shown.
Source: Indeed and Censuswide survey of 2,780 employers in Belgium, France, Germany, Ireland, Italy, the Netherlands, Switzerland and the UK

3. Wealthy and open economies stand to gain

The trends examined in this report undoubtedly don't have the same effects on all countries. Which countries are most attractive to internationally mobile jobseekers? Which most stand to benefit? To answer these questions, it is important to look at both sides of the equation: the interest overseas candidates show in particular countries and the interest jobseekers in those countries have in searching for jobs elsewhere.

Introducing the net interest score metric: Brain drain or brain gain?

To rank the competitive positions of different countries in the labour market, the Indeed Hiring Lab has developed a measure we call **net interest score**. This metric considers both a country's attractiveness as a destination for job search among people located in other countries and the propensity of that country's jobseekers to search for jobs abroad. We calculate the net interest score as the absolute number of

inbound searches minus the number of outbound searches divided by the sum of the two. Given the [correlation](#) between the intentions suggested by job search behaviour and actual migration patterns, the net interest score is an indicator of whether a country's labour market is likely to gain or lose talent in the future.

Most European countries have a negative interest score, meaning there are more outbound searches than inbound searches. 'Brain drain' seems to be the issue facing most countries, not 'brain gain'.

Most European countries have a negative interest score, meaning there are more outbound searches than inbound searches. 'Brain drain' seems to be the issue facing most countries, not 'brain gain' (Figure 14).

There are some notable exceptions, however. In 2021, the latest available full year of data, the biggest net importers of candidates were Luxembourg, Switzerland, the UK, Germany and Ireland, with more incoming interest from jobseekers than outgoing. Luxembourg,

Switzerland and the UK are well ahead of the competition in terms of net brain gain.

Among the top three, Luxembourg heavily relies on international jobseekers: on Indeed's Luxembourg site — one of the smallest in Europe — 74% of all searches in 2021 were inbound from jobseekers outside the country. At the same time, just 32% of searches conducted by jobseekers located in Luxembourg were outgoing. Switzerland also heavily draws on global candidates. Some 32% of searches on Indeed's Swiss site were from outside the country, while 11% were outgoing.

The UK's large labour market has a heavy domestic focus, with only 3.2% of searches for UK jobs coming from outside the country in 2021 and 1.4% of UK jobseekers searching in other countries. While the cross-border share of UK traffic on Indeed was small, the net flow was positive. The UK remains an attractive destination on the global labour market despite the decline in interest in British jobs from EU-based candidates [after Brexit](#).

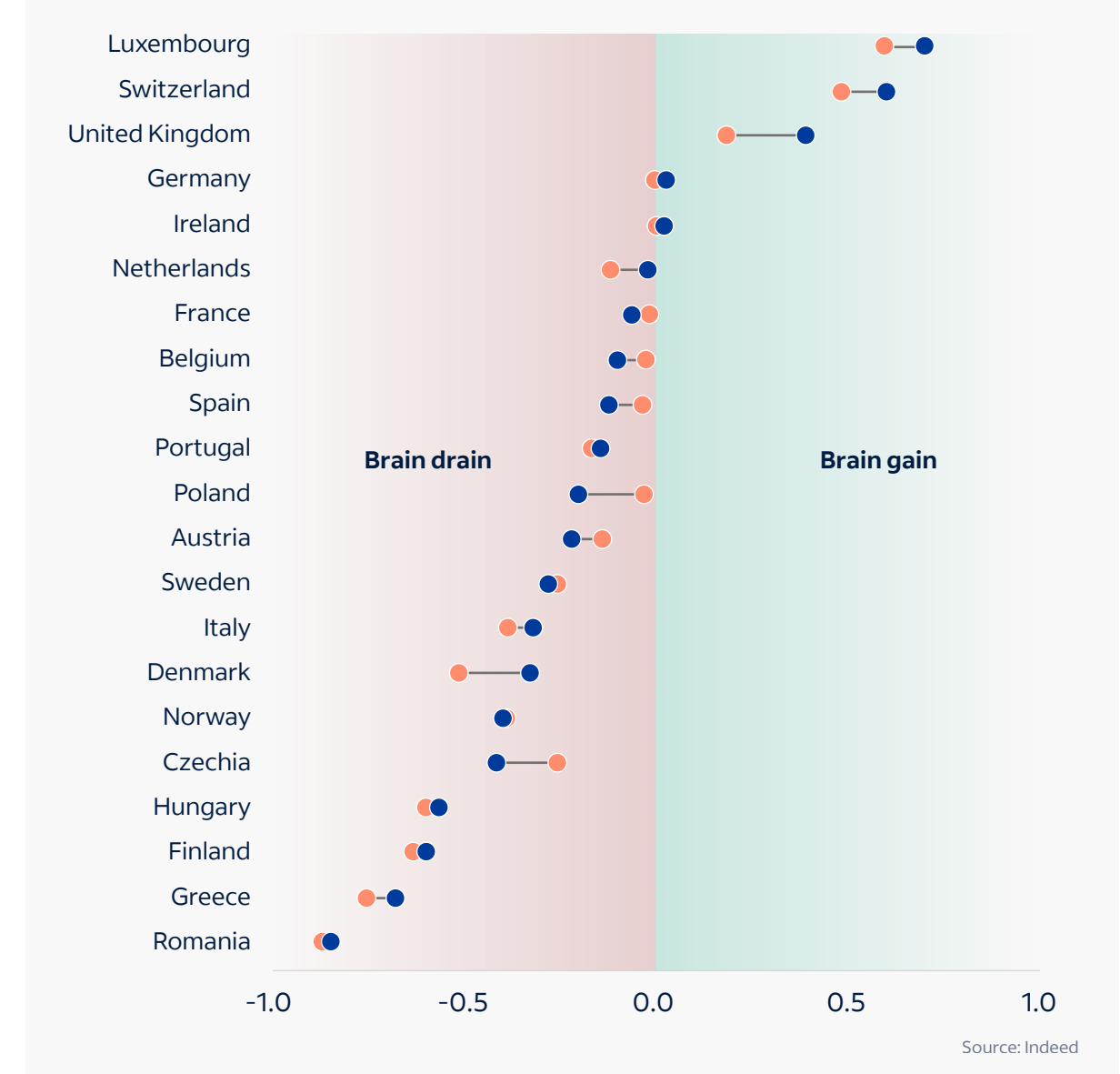
In Germany, the 2021 shares were 3.9% incoming and 3.7% outgoing. In Ireland, 8.2% were incoming and 7.9% outgoing. In both countries, the net interest scores were close to balance but slightly positive. In France and the Netherlands, the net interest scores were only slightly negative, suggesting these countries may receive substantial net immigration flows as the pandemic continues to ebb.

At the other extreme, Romania and Greece had the strongest net negative jobseeker interest. In Greece, 12.2% of all job searches were outgoing

in 2021, while only 2.5% were incoming. In Romania, the job search brain drain was even more alarming. Almost one in two job searches in Romania — a full 49.7% — was for jobs outside the country. Only 6.5% of searches for Romanian jobs were inbound. This is in line with labour migration data, which show [one-fifth of Romania's working-age population](#) resides elsewhere in the EU.

These results highlight important issues for employers. Searching for a job abroad has never been easier. That means employers face competition for talent not only from within their countries, but also from employers in other countries. This underscores how crucial retention of talent is, especially in countries at risk of brain drain.

Figure 14 - Net interest score: 2021 (blue) vs. 2019 (orange)
Inbound job searches minus outbound job searches on Indeed, divided by the sum of the two



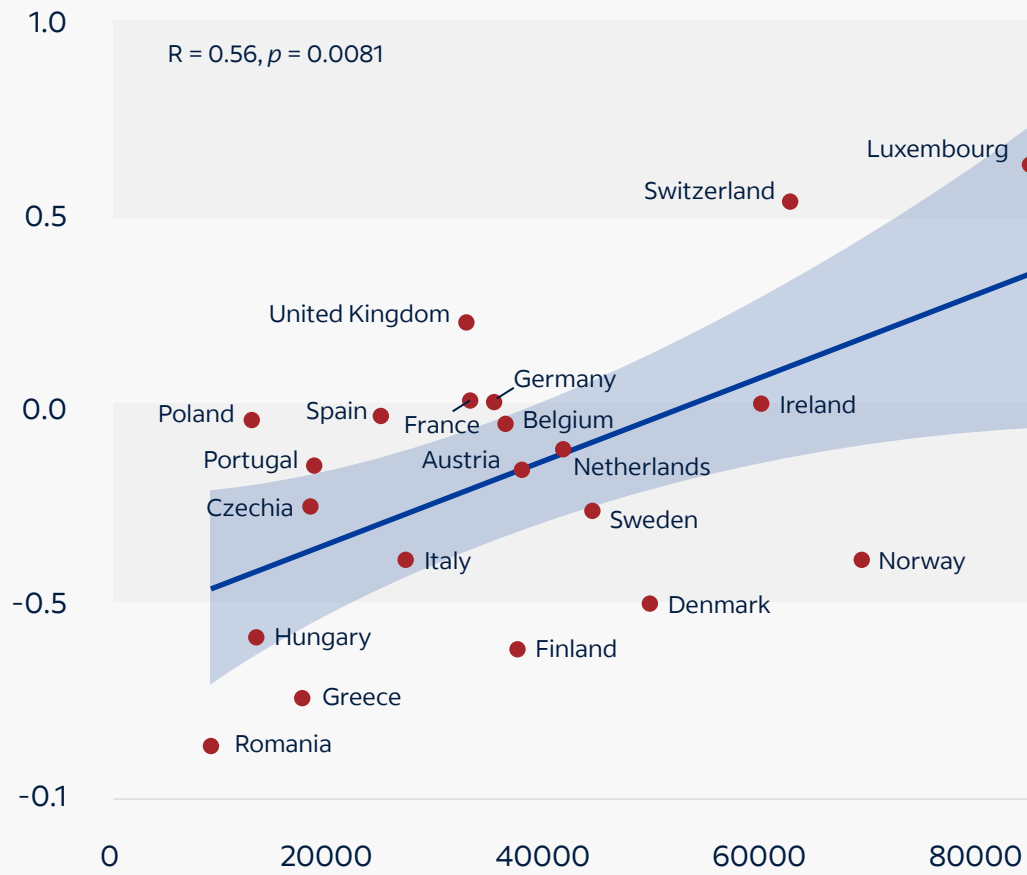
There are many reasons why some countries are more attractive to jobseekers than others. One is a country's wealth. To avoid bias driven by the pandemic, we examined 2019 data.

Figure 15 shows a strong positive correlation

between GDP per capita and a country's net interest score. In other words, higher-income countries tend to be more powerful magnets for jobseekers than lower-income ones.

Figure 15 - Higher-income countries are more attractive to international jobseekers

Net interest score (y-axis) and real GDP per capita (x-axis) in EUR in 2019



Source: Eurostat, Indeed

What drives the changes in country attractiveness?

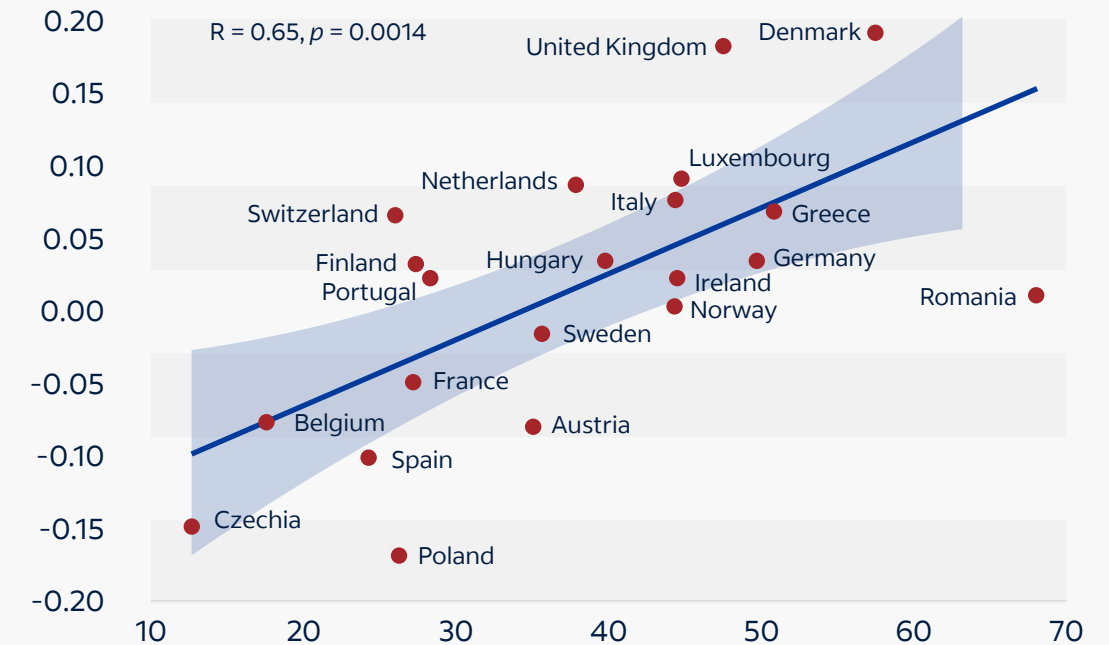
Changes in net interest score from 2019 to 2021 are strongly correlated with growth in job postings (Figure 16). Many factors can lead a country to deviate from this relationship, such as changes in the composition of jobs or different wage growth trends. But generally net interest score has improved in countries with higher job posting growth.

Conversely, net interest score has declined in countries where job posting growth has lagged

the European average. Romania is somewhat of an outlier. Postings on Indeed have grown rapidly, but the country's net interest score has only improved slightly. Romanians are the [most mobile Europeans](#). The country's net interest score trend suggests Romanians continue to look for jobs abroad and are only slowly beginning to take advantage of growing domestic job opportunities.

Figure 16 - Countries with higher job posting growth have seen an improvement in net jobseeker interest

Change in net interest score from 2019 to 2021 (y-axis) and job posting growth on Indeed from Feb 2020 to Dec 2021 (%), x-axis)



Source: Indeed

As a country's job postings grow, its net interest score tends to increase because of reduced outbound job search rather than increased inbound search. In other words, strong job

posting growth doesn't appear to attract more jobseekers from abroad. Instead, it makes domestic jobseekers less likely to search for opportunities in other countries.



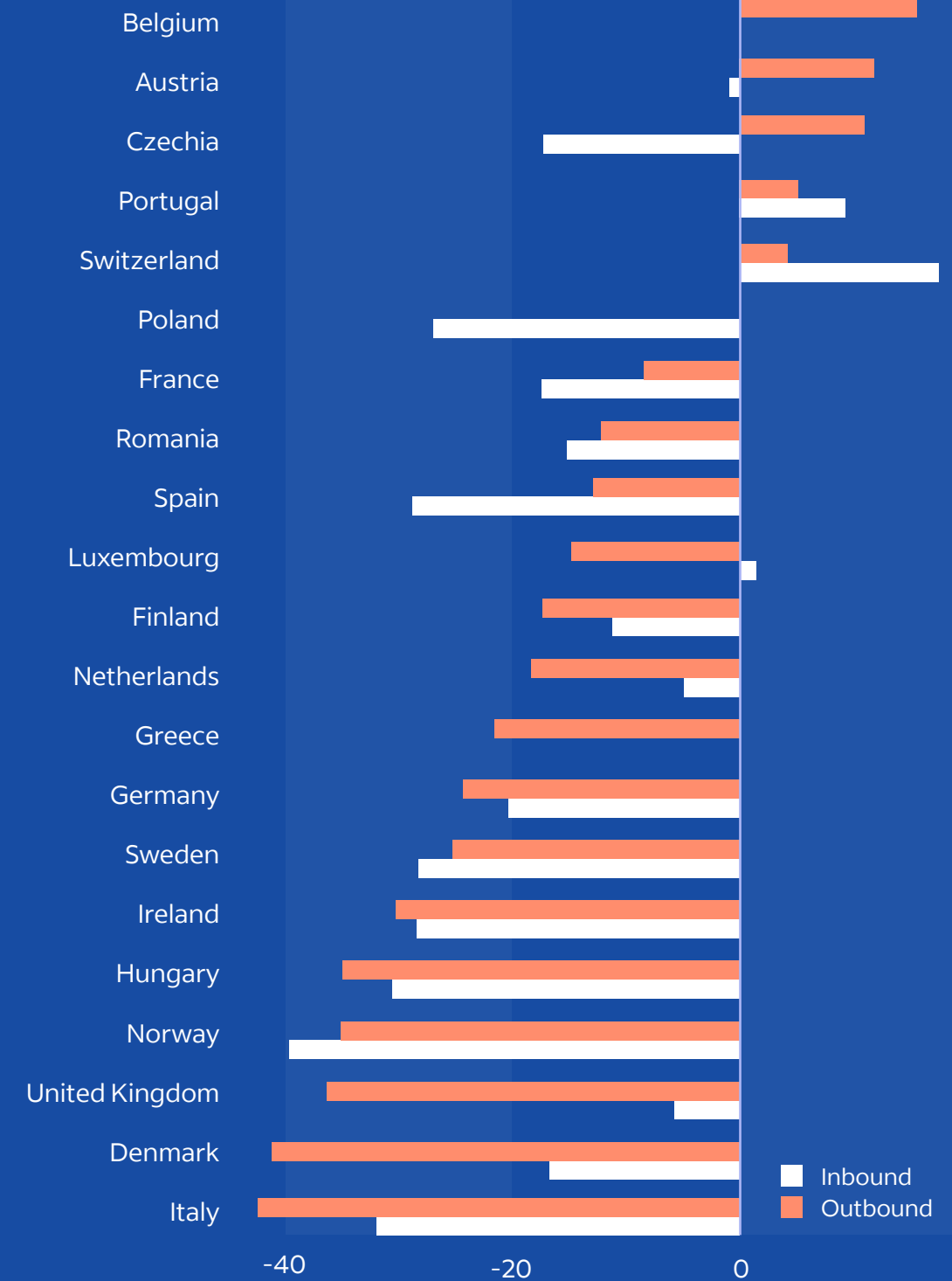
What has changed with the pandemic?

Since the onset of the pandemic, 13 out of 21 countries have improved their net interest score, reducing their brain drain as measured by job search. However, the pandemic has not fundamentally changed whether a country gains or loses jobseeker interest. Germany is the one exception. From 2019 to 2021, Germany switched from a near-balanced net interest score of 0.001 to a positive net interest score.

The reason? Jobseekers in Germany have focused more on domestic search, probably driven by pandemic restrictions as well as the country's strong domestic labour market. Figure 17 shows similar patterns in many other countries. It will be interesting to see how the increase in cross-border job search influences these trends as national labour markets recover further from the pandemic.

Figure 17 - Outbound searches remained below pre-pandemic levels in most countries in 2021

Percentage change in the outbound and inbound search shares from 2019 to 2021



Source: Indeed; missing bar means value equals to 0

4. Employers are getting ready for a rebound in international migration

As international mobility and cross-border job search rise, hiring foreign workers is on the agenda for many employers. We surveyed businesses to understand how many of them are planning to hire foreign workers, why they are doing so, what they are doing to attract candidates from abroad and what challenges they foresee in hiring those candidates. We ran the survey in collaboration with Censuswide in eight countries – Belgium, France, Germany, Ireland, Italy, the Netherlands, Switzerland and the UK – in the second half of March 2022.

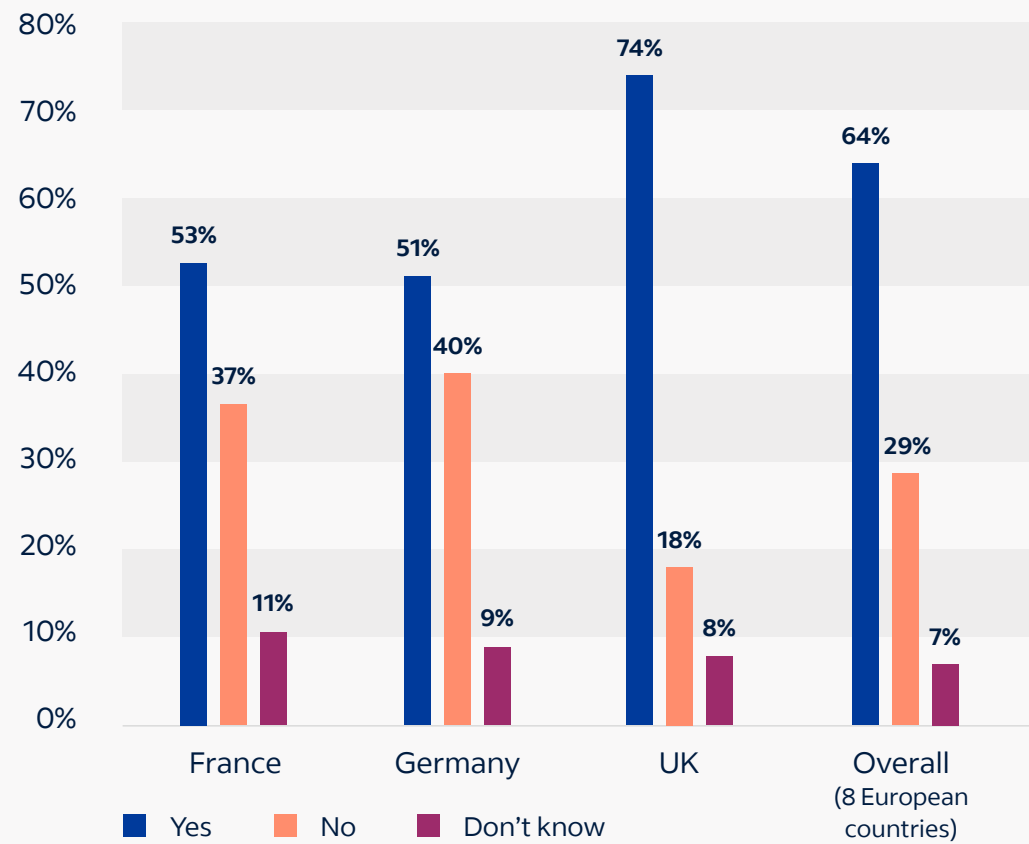
European employers are keen to hire foreign workers in 2022

According to the survey, as many as 74% of UK businesses, 53% of French businesses and 51% of German businesses will “definitely” or “probably” hire foreign workers in 2022 (Figure 18). Overall, across the eight countries surveyed, 64% of businesses responded

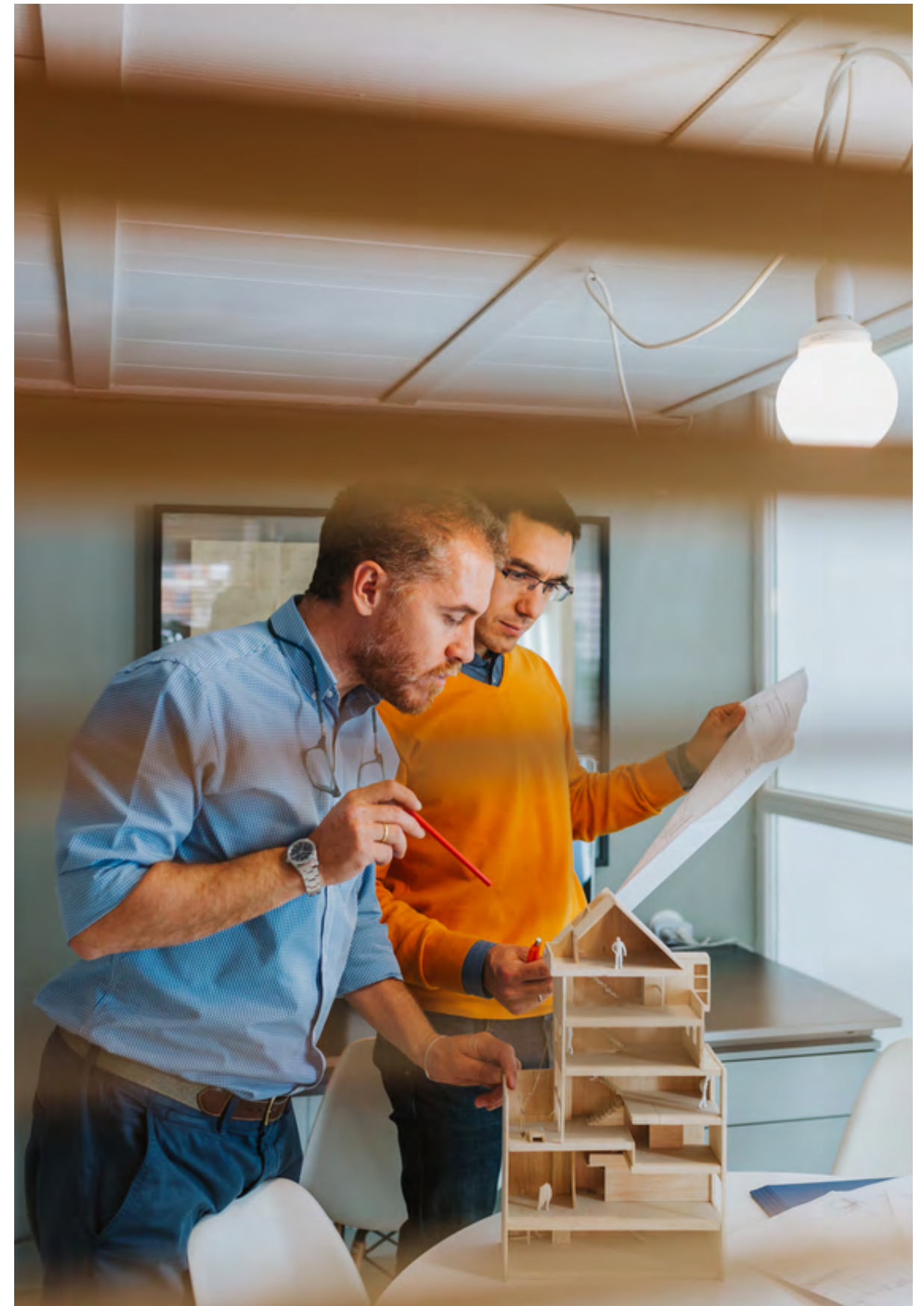
affirmatively. This is slightly more than the 58% who reported having hired foreign nationals in the past five years. It seems that jobseekers, who are increasingly searching for jobs abroad, will find many employers willing to hire them.

Figure 18 – Many employers are planning to hire foreign workers in 2022

How likely is it, if at all, that your business will actively recruit foreign nationals for its operations in your country in 2022?



Yes = “definitely” or “probably”, No = “definitely not” or “probably not”
 Source: Indeed and Censuswide survey of 2780 employers in Belgium, France, Germany, Ireland, Italy, the Netherlands, Switzerland and the UK



Employer motivations for hiring foreign workers vary across countries, but there are some common themes. A labour shortage in the domestic labour market was the most common reason cited in five of the eight countries in our survey and was the top answer overall, given by 43% of businesses (Figure 19).

Foreign language skills were the second most commonly cited motive for hiring foreign workers.

This was especially notable in the Netherlands (57%) and Germany (51%). Both countries experienced [fast job postings growth](#) during the recovery from the pandemic.

Foreign language skills were the second most commonly cited motive for hiring foreign workers (37% overall) and the top answer in Italy (46%), Switzerland (42%) and France (41%). In the cases of Italy and France, one reason might be that fewer working-age adults [report knowing at least one foreign language](#) than the European average, creating barriers to communication with colleagues and customers who don't speak the national tongue.

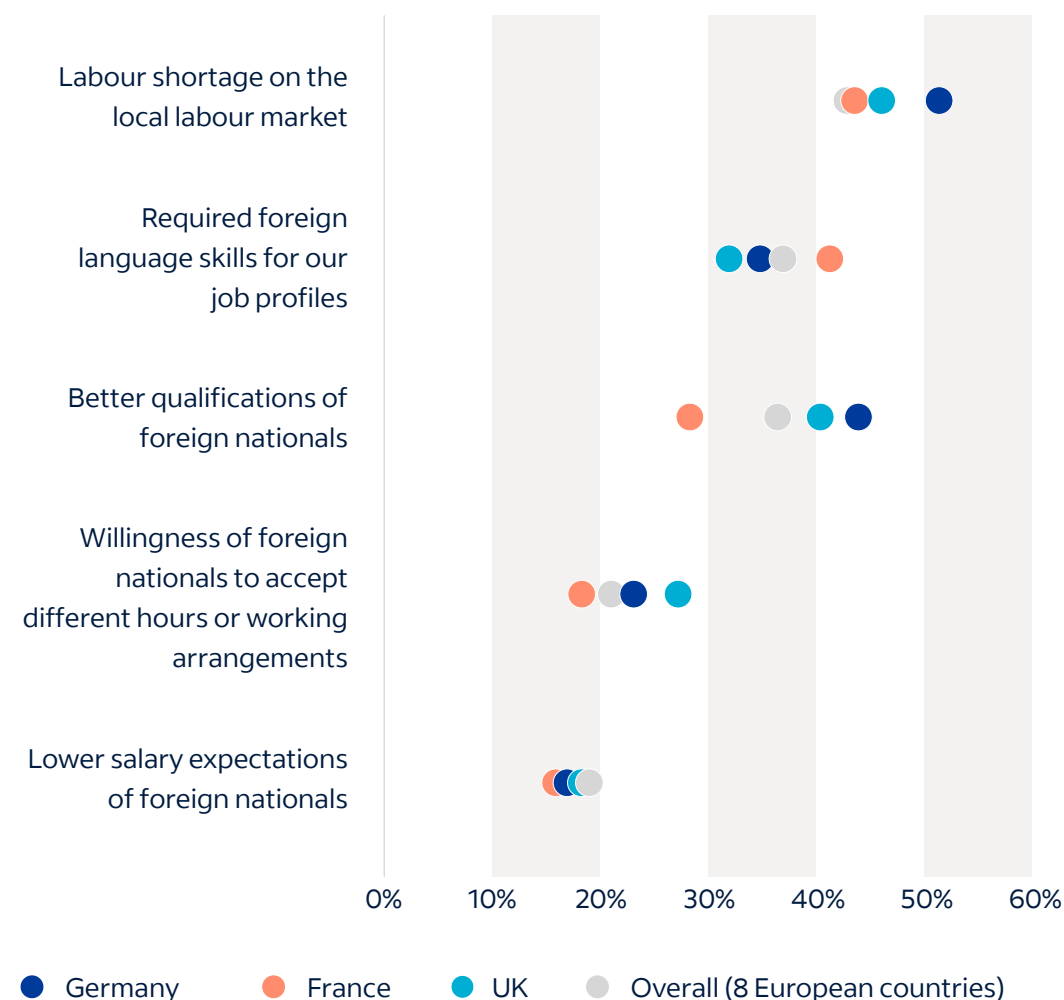
Language skills were followed closely by better qualifications of foreign nationals (36% overall), which was especially important to businesses in Switzerland (51%) and Germany (43%). Those two countries have very low unemployment rates, which means that finding qualified staff in the domestic pool of unemployed people is challenging.

Only around a fifth of businesses cited the willingness of foreign nationals to accept different hours or working arrangements (21% overall). This was cited most frequently by businesses in Ireland (29%) and the UK (27%). Finally, 19% of businesses cited lower salary expectations of foreign nationals.

Overall, the survey results indicate the main reason for hiring foreign nationals is demand for qualified workers. Foreign nationals certainly don't seem to be a second choice for employers.

Figure 19 – Labour shortages are one of the main reasons why employers plan to hire foreign workers

What are the reasons why your business will “definitely/probably” hire foreign nationals in your country?



Note: Other/Don't know not shown.
 Source: Indeed and Censuswide survey of 2780 employers in Belgium, France, Germany, Ireland, Italy, the Netherlands, Switzerland and the UK
 Chart based on responses from 1779 employers who will actively recruit foreign nationals for their business in 2022

Hiring foreign workers can be challenging

Hiring foreign workers isn't free of difficulties. Of the businesses that will definitely or probably hire foreign workers this year, 33% cited insufficient language skills as a challenge (Figure 20). For 28%, the lack of required qualifications or certifications was a problem, while 27% cited insufficient knowledge of the

Some 73% of people enjoyed working with colleagues from other countries.

learn a language, simplifying legal processes and speeding up recognition of foreign credentials might be relatively quick ways to facilitate recruitment of foreign workers.

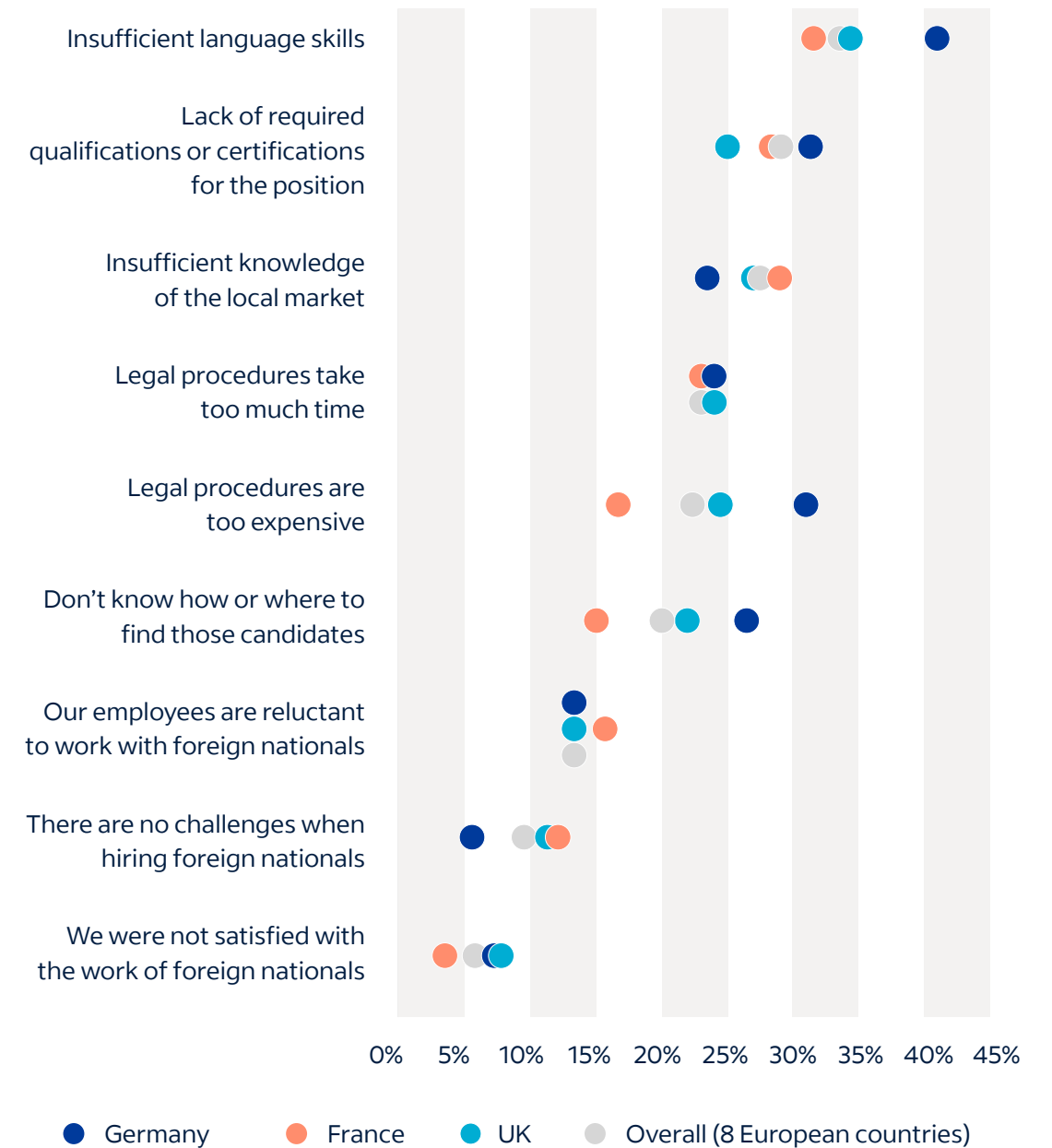
local market. The time or cost of legal procedures required to hire foreigners were issues for 22% of businesses. While it often takes time for foreign workers to

Some 20% of employers said they did not know how to find foreign candidates. Such employers might benefit from using some of the strategies discussed later in this section. Finally, just 13% of survey respondents said their employees were reluctant to work with foreign nationals.

Employers' belief that only a small minority of employees are reluctant to work with foreign colleagues is consistent with the results of our survey of working-age adults in the same eight countries. Some 73% of people enjoyed working with colleagues from other countries, 72% believed that working with foreigners helped them learn new things and 63% believed foreign workers had skills that complemented their own abilities.

Figure 20 – Language skills are one of many challenges in hiring foreign workers

What are the most common challenges when hiring foreign nationals in your business or in your sector?



Note: Other/Don't know not shown.
 Source: Indeed and Censuswide survey of 2780 employers in Belgium, France, Germany, Ireland, Italy, the Netherlands, Switzerland and the UK
 Chart based on responses from 1779 employers who will actively recruit foreign nationals for their business in 2022

Businesses are taking concrete steps to attract foreign candidates

We asked businesses that said they would definitely or probably hire foreign nationals in 2022 what efforts they have made, if any, to appeal to those candidates. The answers revealed a wide variety of strategies (Figure 21).

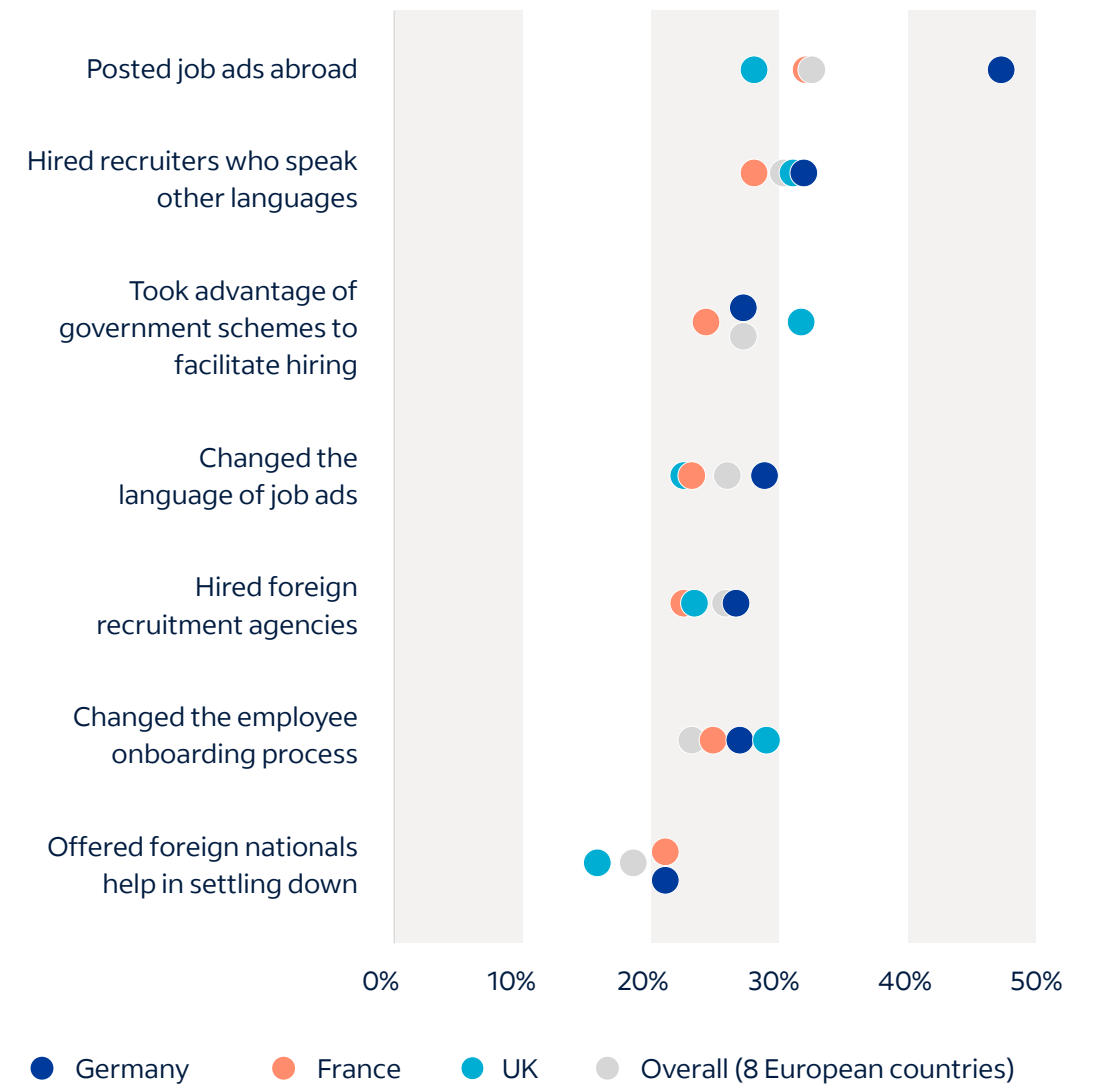
Language considerations were commonly cited, with 31% of businesses reporting they hired recruiters who spoke other languages.

Some related to hiring channels. Some 33% of businesses posted job ads abroad, 27% took advantage of government schemes that facilitated hiring foreign workers and 26% hired foreign recruitment agencies.

Language considerations were commonly cited, with 31% of businesses reporting they hired recruiters who spoke other languages and 26% saying they changed the language of jobs ads. Other strategies related to assimilating foreign employees after they were hired. Some 23% of businesses changed the onboarding process to facilitate the integration of foreign workers into the workforce, while 18% offered foreign workers practical help in settling down. The fact that no single strategy was picked by the majority of respondents suggests that the recipe of choice for attracting foreign workers has multiple ingredients.

Figure 21 – Employers use a wide range of strategies to appeal to foreign candidates

What efforts has your business made, if any, to appeal to candidates who are foreign nationals?



Note: Other/None/Don't know not shown.
 Source: Indeed and Censuswide survey of 2780 employers in Belgium, France, Germany, Ireland, Italy, the Netherlands, Switzerland and the UK
 Chart based on responses from 1779 employers who will actively recruit foreign nationals for their business in 2022

5. Conclusion: What do the shifting international job search patterns mean for recruitment?

As public health restrictions ease all over the world, cross-border job search is on the rise. European jobseekers are increasingly searching for jobs in other countries and interest from candidates outside Europe has jumped well above pre-pandemic levels. This is strong evidence migration is poised to increase. Meanwhile, as post-pandemic labour shortages bite and job vacancies in Europe's biggest economies remain at or near record levels, many employers are gearing up to hire foreign workers.

TAKEAWAYS FOR EMPLOYERS

1

Cross-border job search has picked up after falling during the pandemic and **international work-related migration** is on the rise. Employers should **get ready** for the inflow of foreign candidates. To plan hiring strategies for 2022 and beyond, employers should learn where foreign candidates are from and what jobs they're interested in.

“To plan hiring strategies for 2022 and beyond, employers should learn where foreign candidates are from and what jobs they're interested in.”

2

Remote, high-paying and hard-to-fill jobs tend to receive high shares of clicks from overseas. Employers hiring for these roles should think about ways to attract foreign workers as a strategy to address **labour shortages**.

3

In today's **tight labour market**, many businesses are already taking steps to hire foreign workers, such as **posting jobs abroad**, hiring recruiters with **foreign language skills**, taking advantage of **government schemes** or writing **job descriptions** in multiple languages.

4

Jobseekers react to **geopolitical events** such as political turmoil and war. Employers who want to hire those fleeing armed conflict and persecution should be open to candidates with **wide ranges of skills and backgrounds**. They should streamline the hiring process to accommodate candidates who may need work more **urgently** than the average jobseeker.

5

Hiring foreign workers isn't free of challenges. Among the biggest are **language barriers**. To speed up the **integration of foreign staff into the workforce**, employers should assess job language requirements and consider helping new joiners improve their language and cultural skills.

6

Most employees appear to have an **open mindset** regarding working with colleagues of other nationalities. Resentment of foreigners is unlikely to be a concern for the majority of employers who plan to hire foreign workers this year.

7

Last but not least, it's not just about attraction — **retention** matters too. Many countries see more outbound than inbound job search, which puts them at risk of brain drain. Employers need to pay attention to staff member needs and know the **salaries and working conditions** competitors offer. And they should set human resources policies accordingly.

“Employers need to pay attention to staff member needs and know the salaries and working conditions competitors offer.”

Country profiles

Austria

Belgium

France

Germany

Ireland

Italy

Netherlands

Poland

Spain

Sweden

Switzerland

UK

Austria

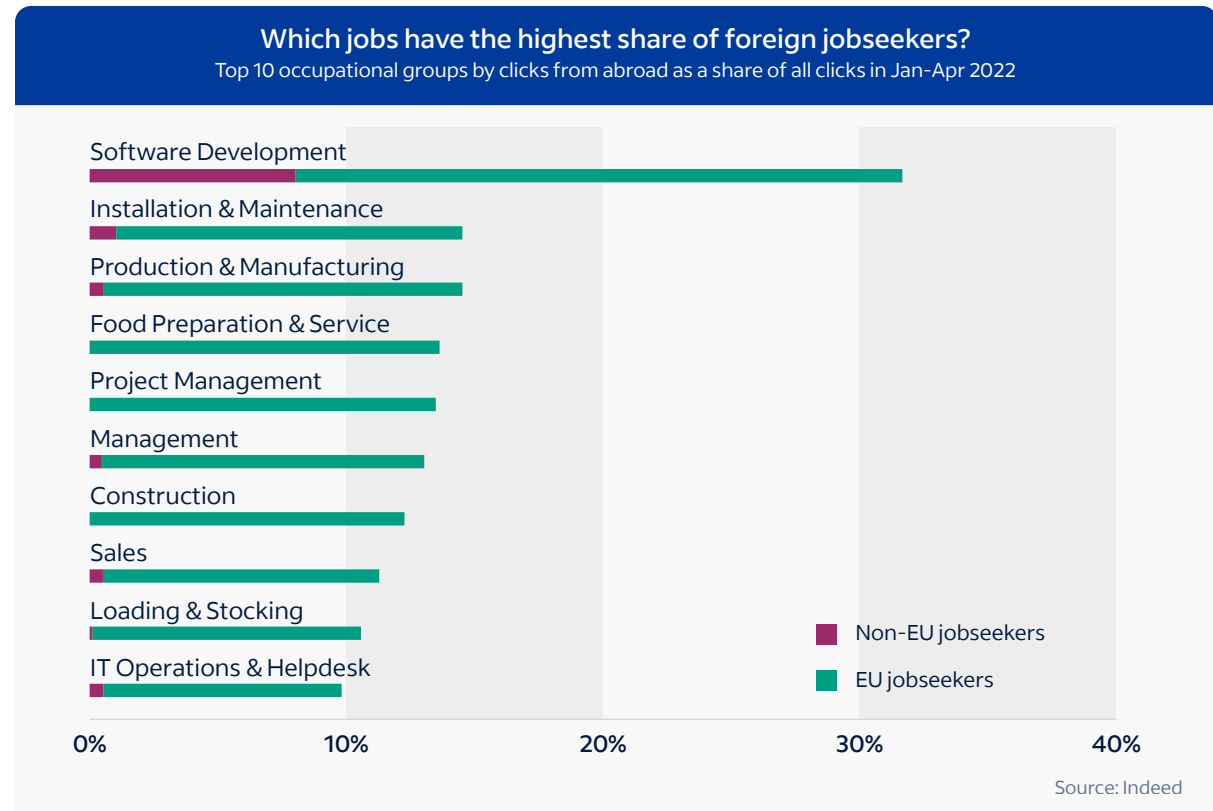
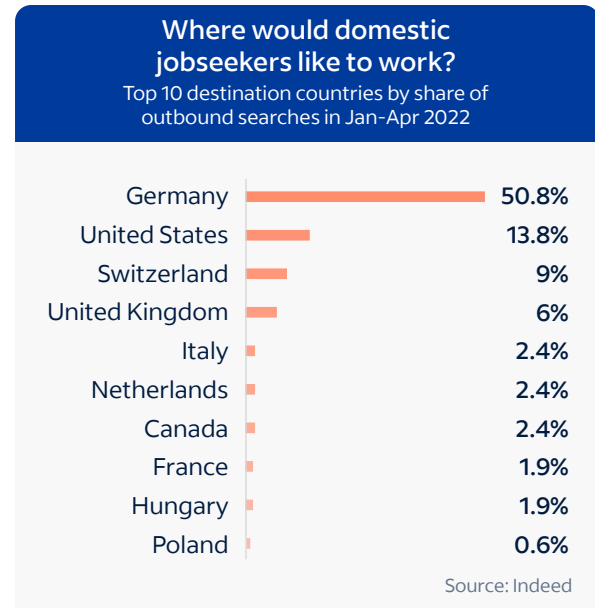
NET INTEREST SCORE
 2021: -0.22 Jan-Apr 2022: -0.344

OUTBOUND JOB SEARCH:

Outbound search share in 2022:	24.1%
%-change from 2019 to 2020:	-10.6%
%-change from 2019 to 2021:	12.9%
%-change from 2019 to Jan-Apr 2022:	41.8%

INBOUND JOB SEARCH:

Inbound search share in 2022:	13.4%
%-change from 2019 to 2020:	-6%
%-change from 2019 to 2021:	-1.5%
%-change from 2019 to Jan-Apr 2022:	0%



Belgium

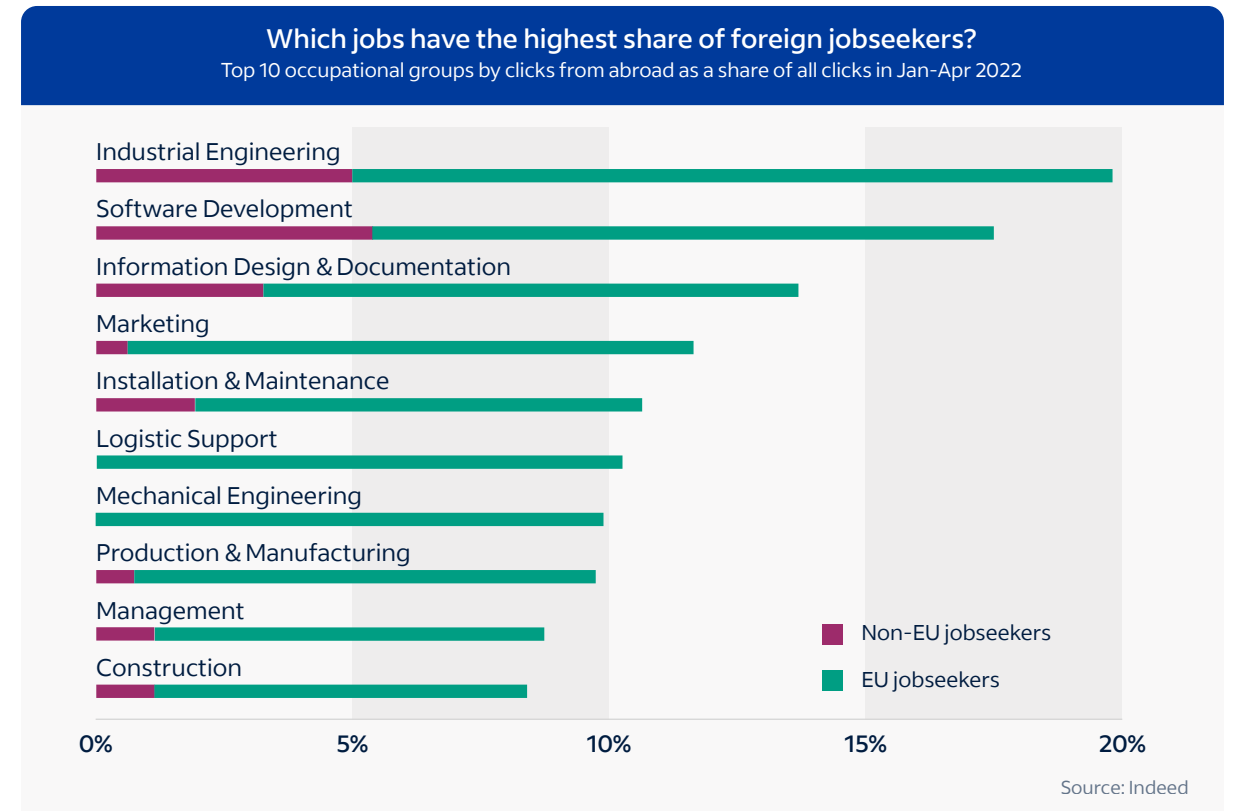
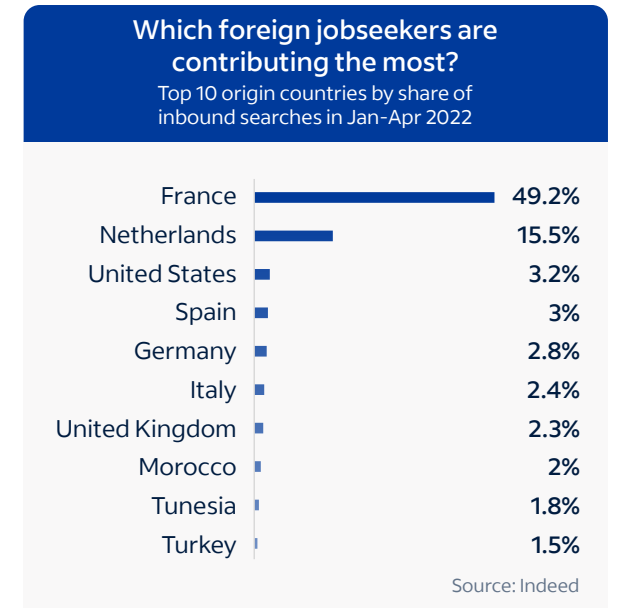
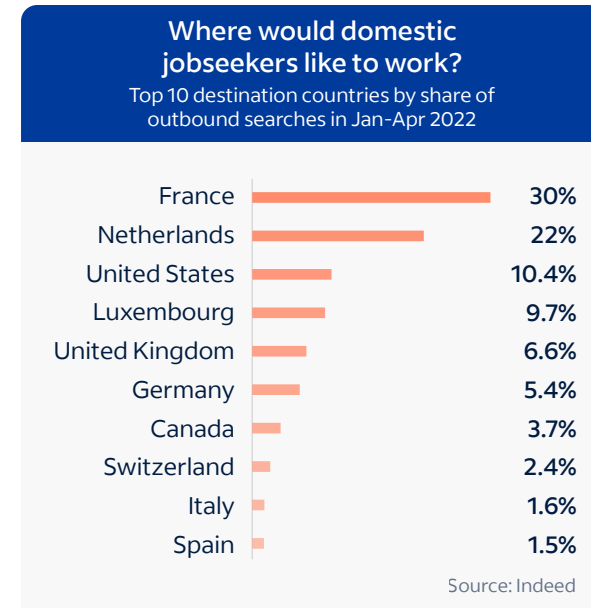
NET INTEREST SCORE
 2021: -0.1 Jan-Apr 2022: -0.123

OUTBOUND JOB SEARCH:

Outbound search share in 2022:	9.2%
%-change from 2019 to 2020:	-2.4%
%-change from 2019 to 2021:	15.9%
%-change from 2019 to Jan-Apr 2022:	12.2%

INBOUND JOB SEARCH:

Inbound search share in 2022:	7.3%
%-change from 2019 to 2020:	-7.6%
%-change from 2019 to 2021:	0%
%-change from 2019 to Jan-Apr 2022:	-7.6%



France

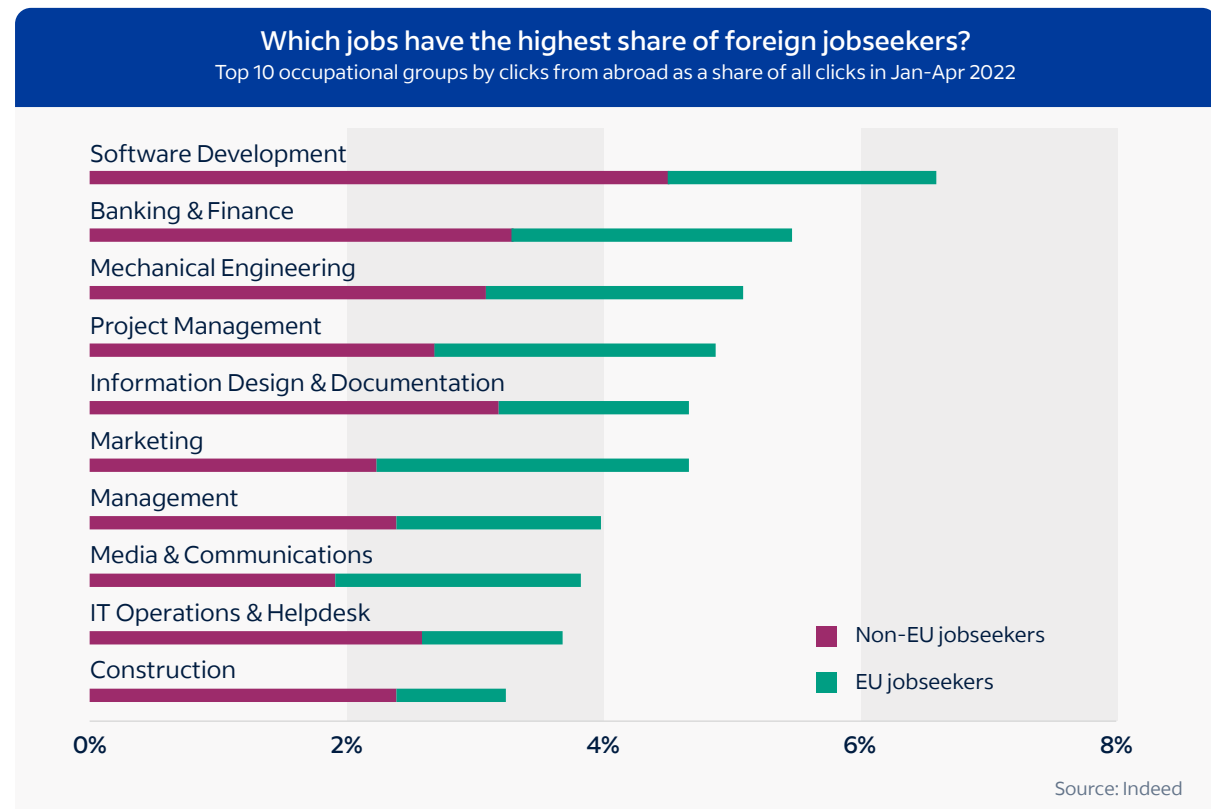
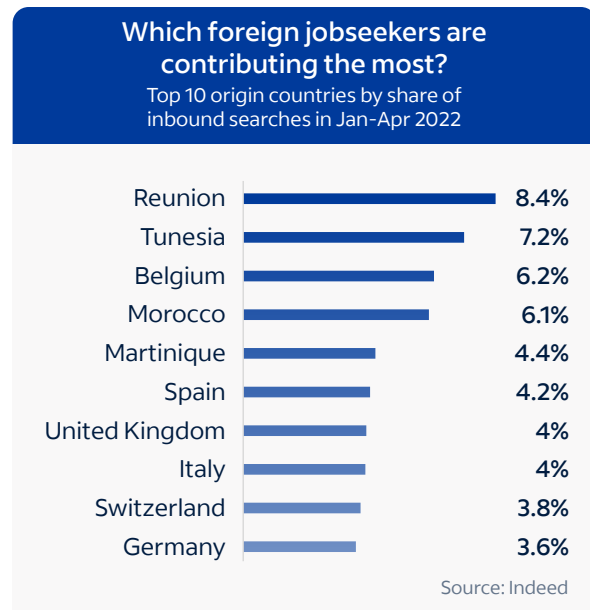
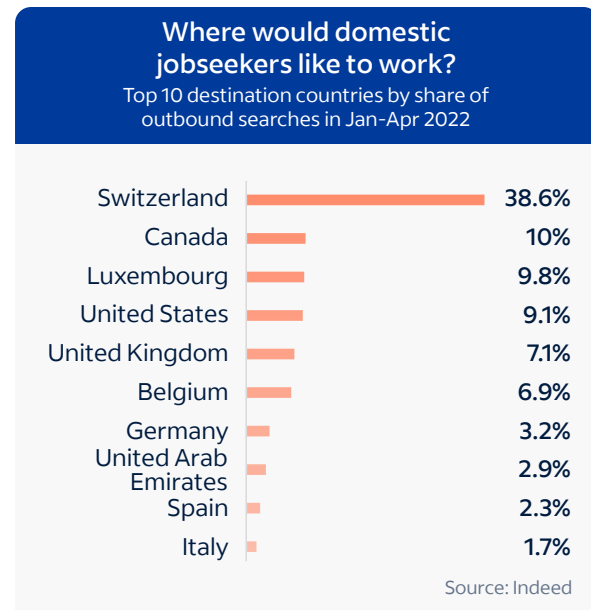
NET INTEREST SCORE
 2021: -0.067 Jan-Apr 2022: -0.065

OUTBOUND JOB SEARCH:

Outbound search share in 2022: **4.2 %**
 %-change from 2019 to 2020: **-17.4 %**
 %-change from 2019 to 2021: **-8.7 %**
 %-change from 2019 to Jan-Apr 2022: **-8.7 %**

INBOUND JOB SEARCH:

Inbound search share in 2022: **3.7 %**
 %-change from 2019 to 2020: **-24.4 %**
 %-change from 2019 to 2021: **-17.8 %**
 %-change from 2019 to Jan-Apr 2022: **-17.8 %**



Germany

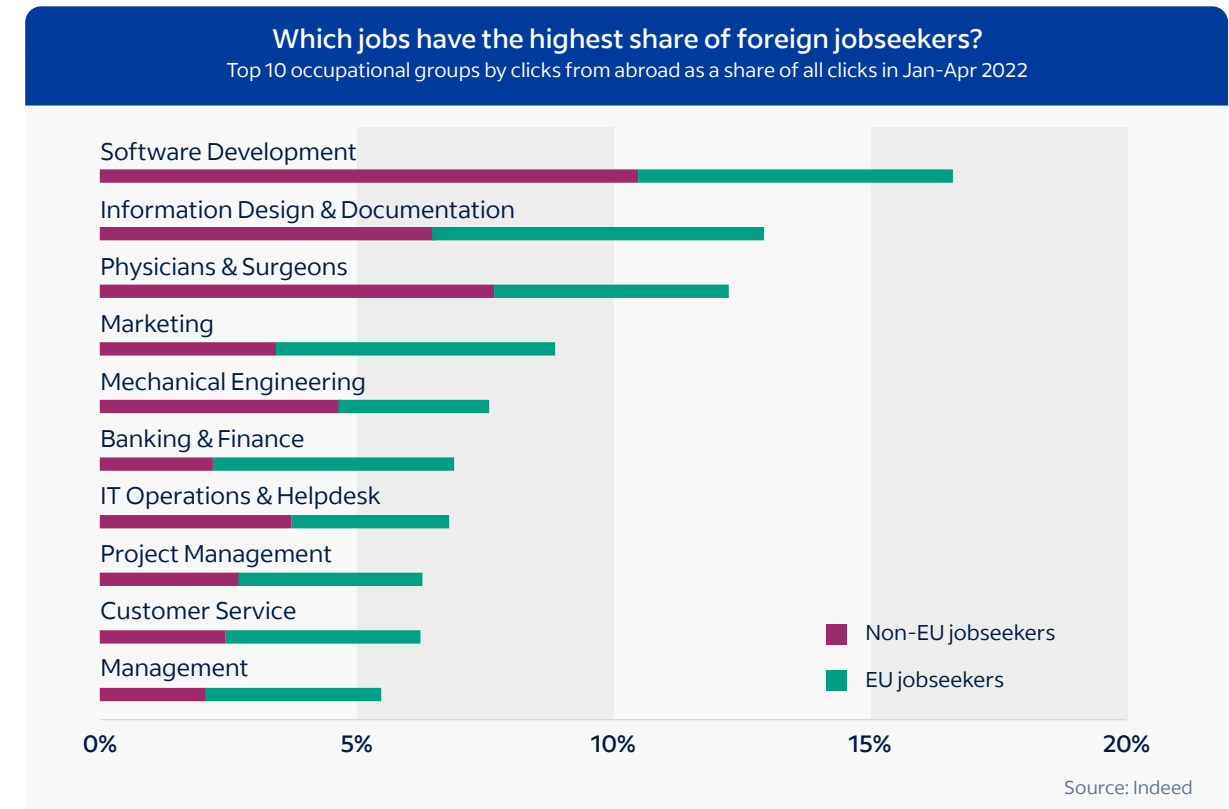
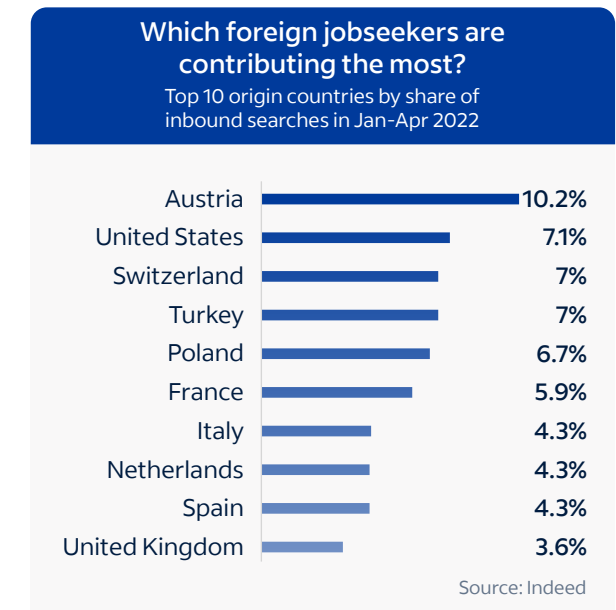
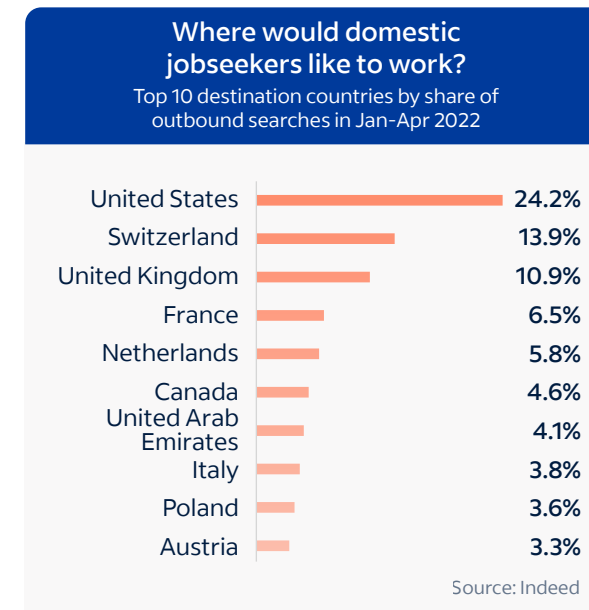
NET INTEREST SCORE
 2021: 0.033 Jan-Apr 2022: 0.045

OUTBOUND JOB SEARCH:

Outbound search share in 2022: **3.7 %**
 %-change from 2019 to 2020: **-18.4 %**
 %-change from 2019 to 2021: **-24.5 %**
 %-change from 2019 to Jan-Apr 2022: **-24.5 %**

INBOUND JOB SEARCH:

Inbound search share in 2022: **4.1 %**
 %-change from 2019 to 2020: **-18.4 %**
 %-change from 2019 to 2021: **-20.4 %**
 %-change from 2019 to Jan-Apr 2022: **-16.3 %**



Ireland

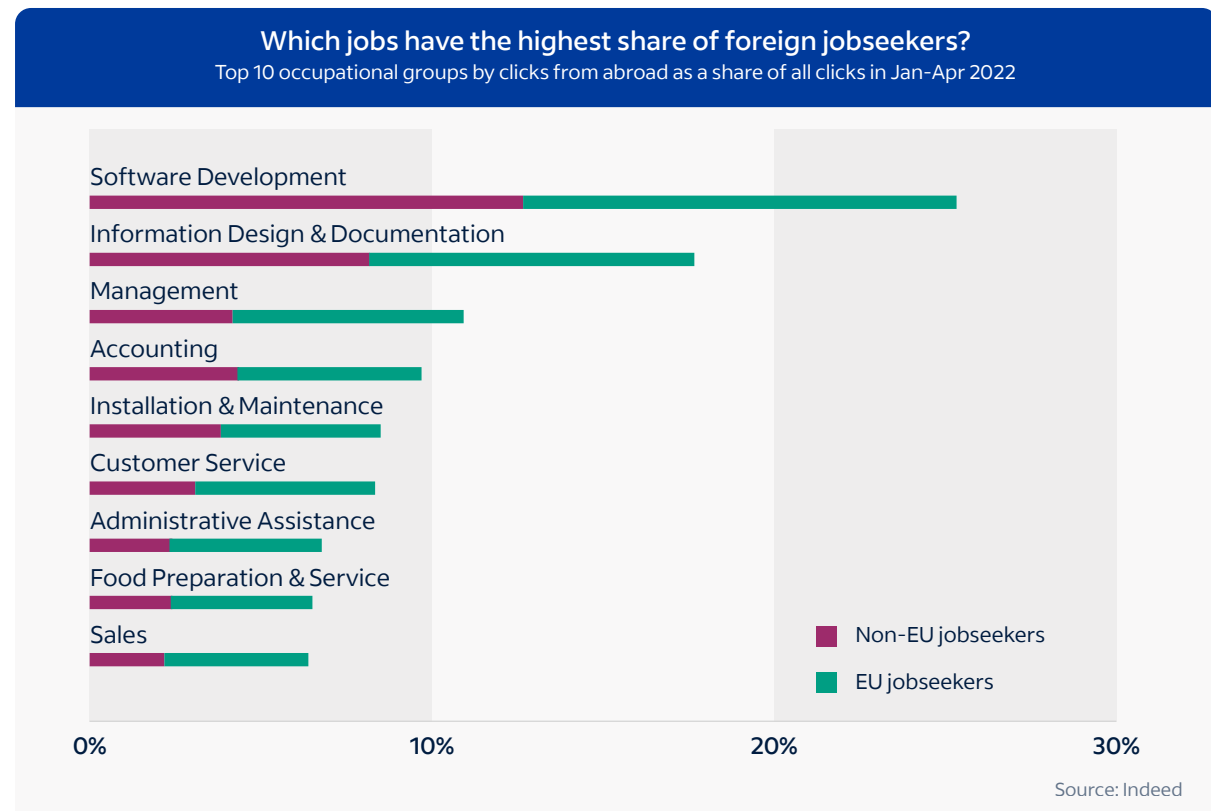
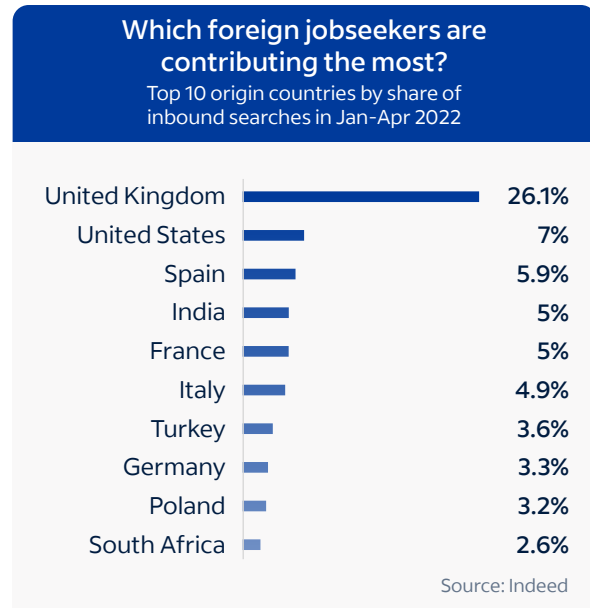
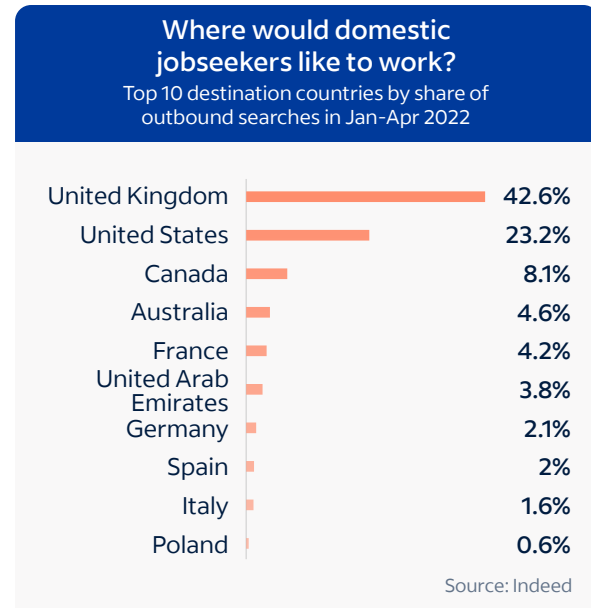
NET INTEREST SCORE
 2021: 0.024 Jan-Apr 2022: 0.016

OUTBOUND JOB SEARCH:

Outbound search share in 2022: **8.6 %**
 %-change from 2019 to 2020: **-29.5 %**
 %-change from 2019 to 2021: **-30.4 %**
 %-change from 2019 to Jan-Apr 2022: **-23.2 %**

INBOUND JOB SEARCH:

Inbound search share in 2022: **8.9 %**
 %-change from 2019 to 2020: **-27.4 %**
 %-change from 2019 to 2021: **-28.3 %**
 %-change from 2019 to Jan-Apr 2022: **-21.2 %**



Italy

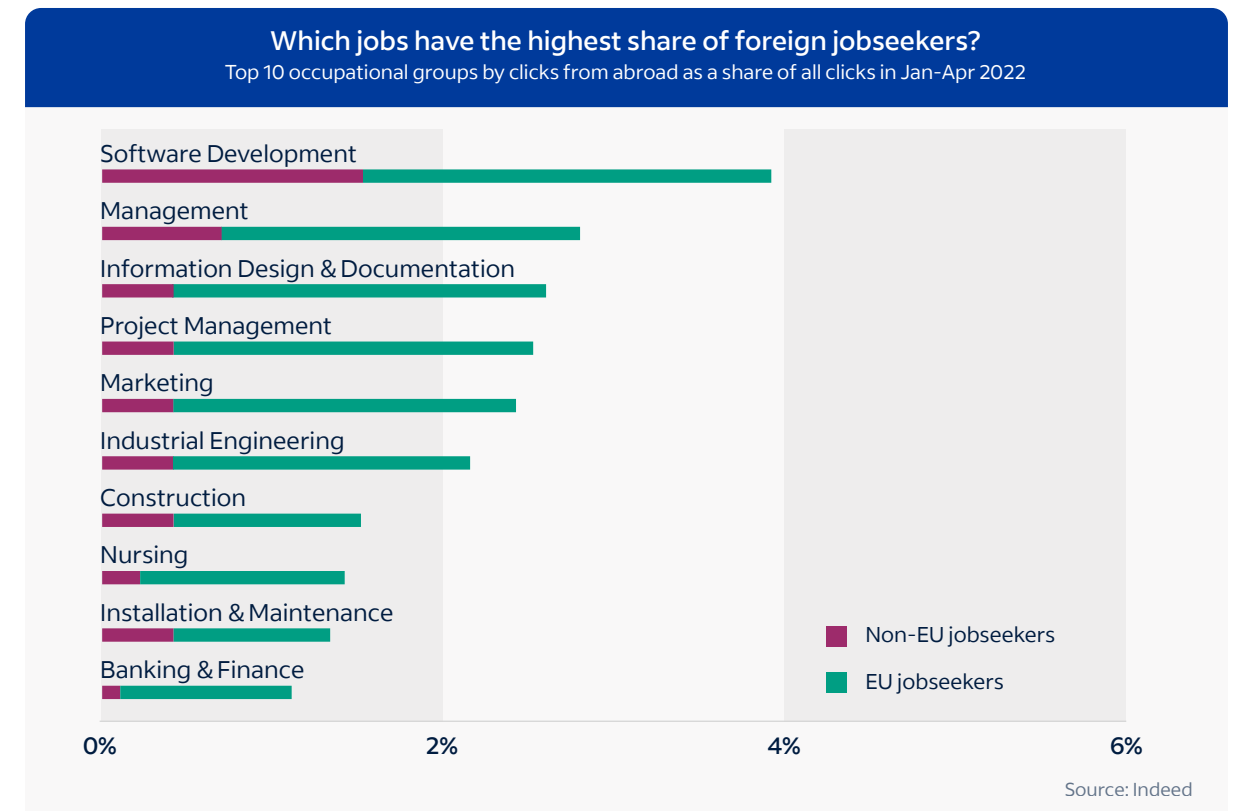
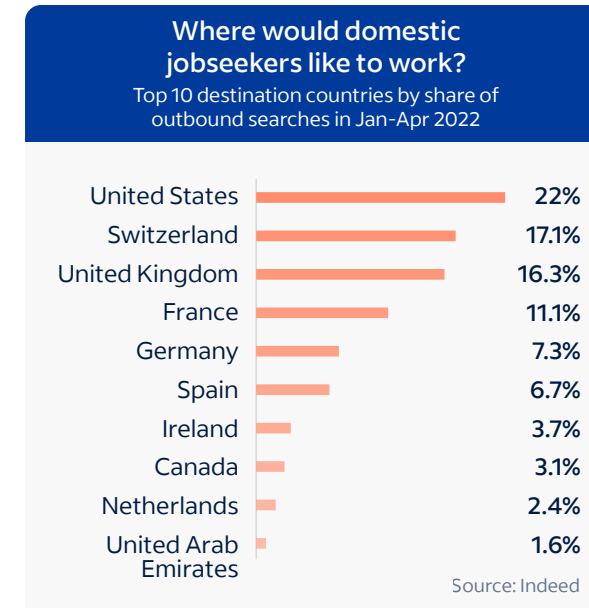
NET INTEREST SCORE
 2021: -0.313 Jan-Apr 2022: -0.34

OUTBOUND JOB SEARCH:

Outbound search share in 2022: **3.2 %**
 %-change from 2019 to 2020: **-30.9 %**
 %-change from 2019 to 2021: **-43.6 %**
 %-change from 2019 to Jan-Apr 2022: **-41.8 %**

INBOUND JOB SEARCH:

Inbound search share in 2022: **1.6 %**
 %-change from 2019 to 2020: **-32 %**
 %-change from 2019 to 2021: **-32 %**
 %-change from 2019 to Jan-Apr 2022: **-36 %**



Netherlands

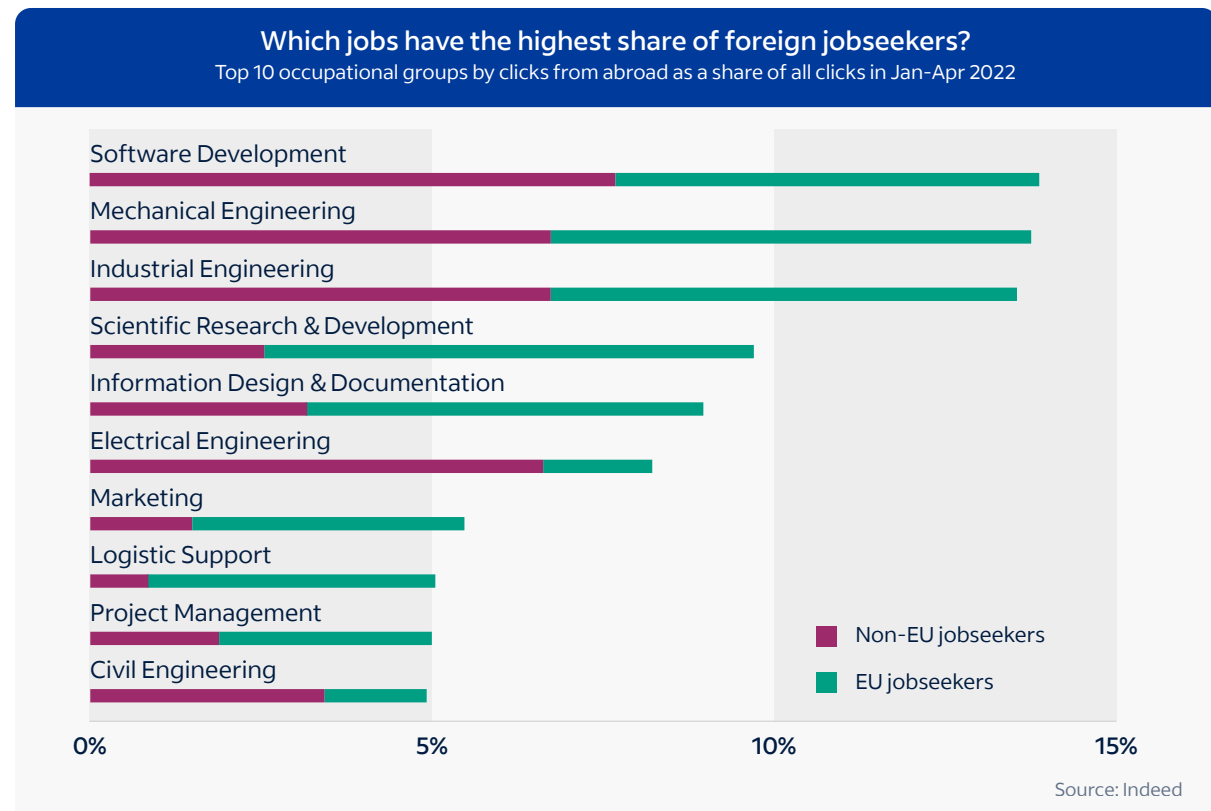
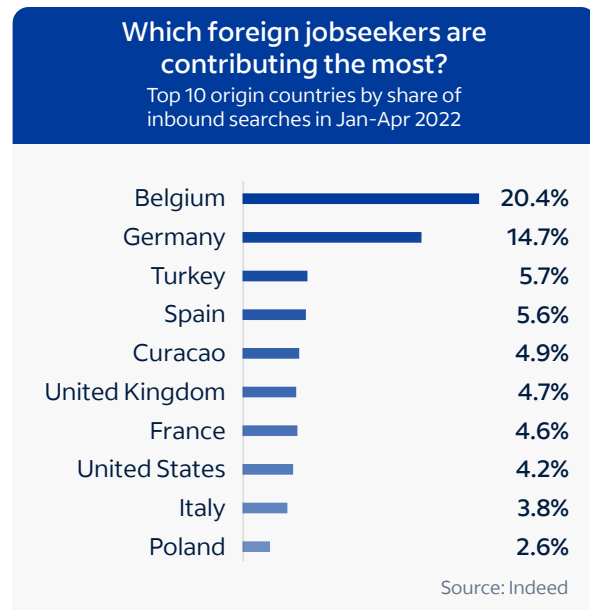
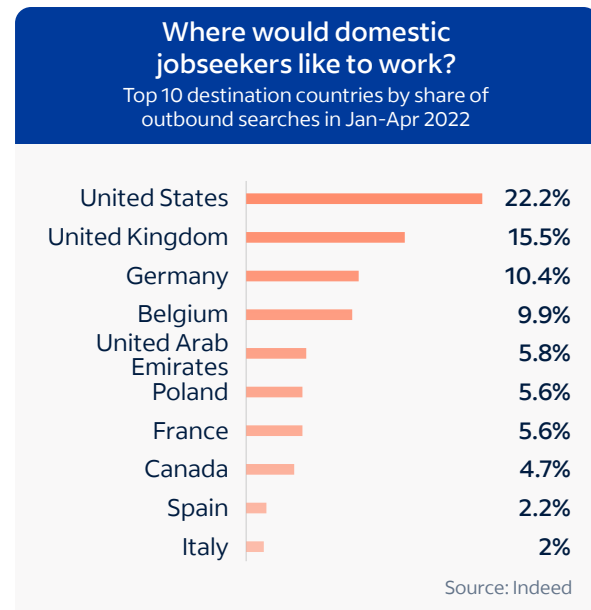
NET INTEREST SCORE
 2021: -0.031 Jan-Apr 2022: -0.067

OUTBOUND JOB SEARCH:

Outbound search share in 2022: **4.4 %**
 %-change from 2019 to 2020: **-20.4 %**
 %-change from 2019 to 2021: **-18.4 %**
 %-change from 2019 to Jan-Apr 2022: **-10.2 %**

INBOUND JOB SEARCH:

Inbound search share in 2022: **3.9 %**
 %-change from 2019 to 2020: **-17.9 %**
 %-change from 2019 to 2021: **-5.1 %**
 %-change from 2019 to Jan-Apr 2022: **0 %**



Poland

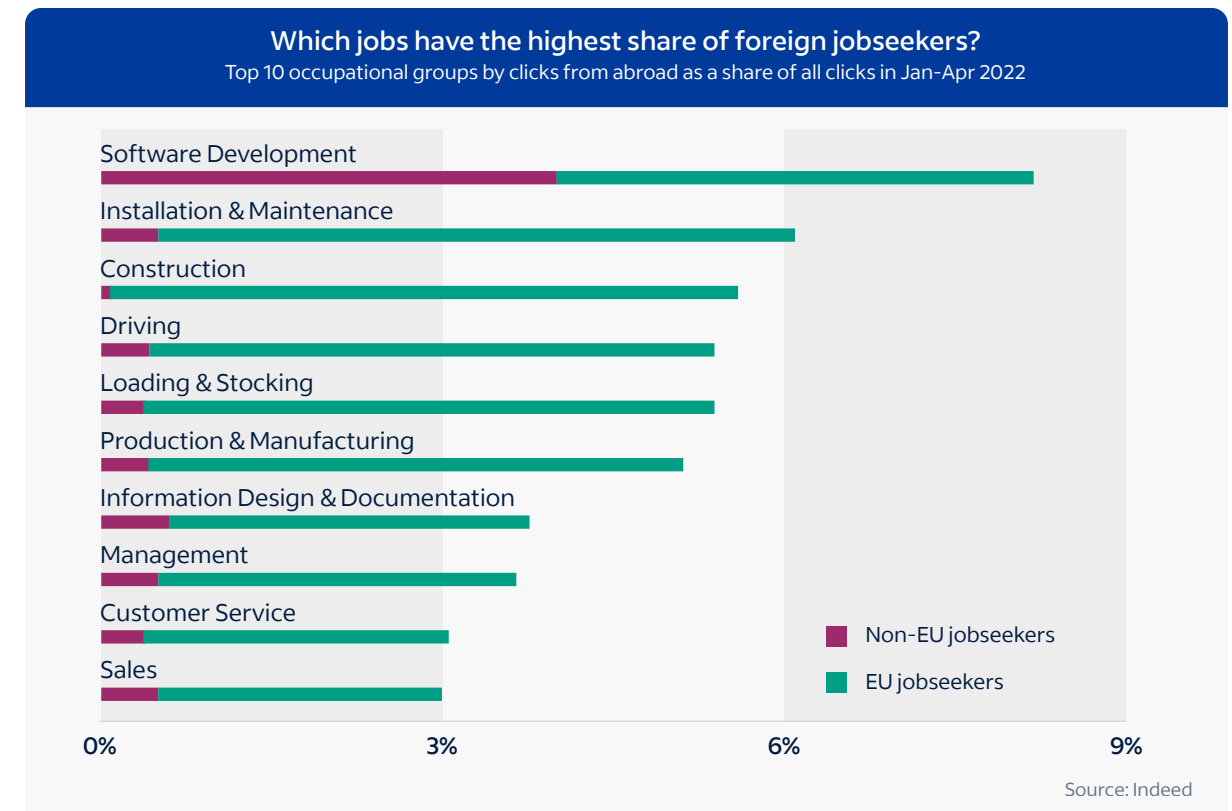
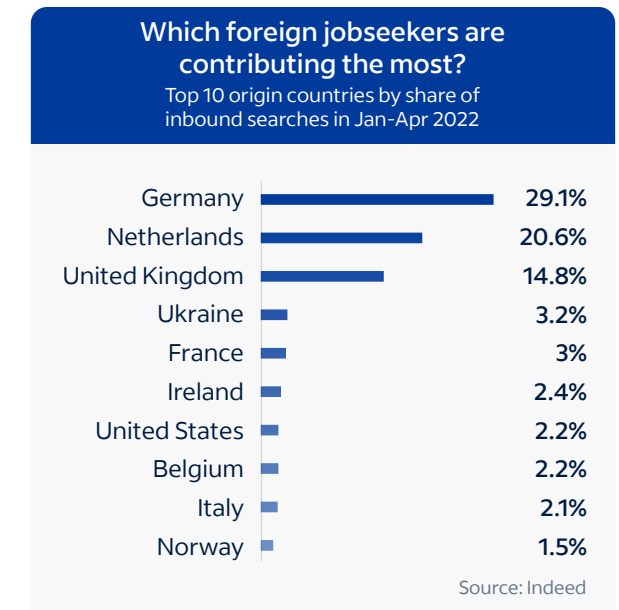
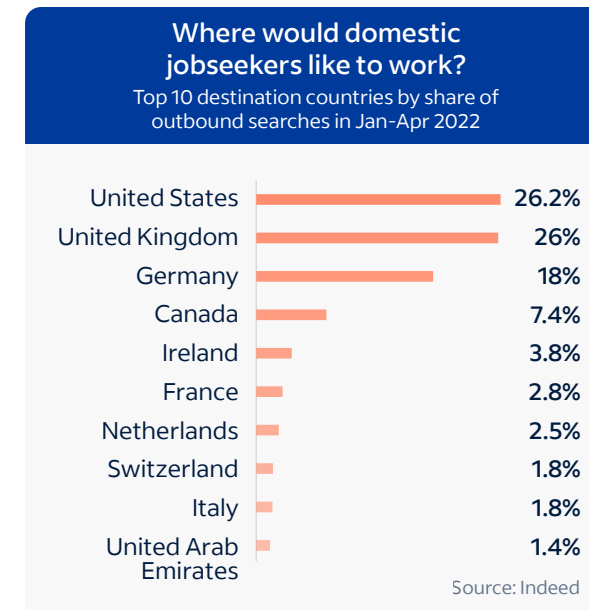
NET INTEREST SCORE
 2021: -0.2 Jan-Apr 2022: -0.538

OUTBOUND JOB SEARCH:

Outbound search share in 2022: **10.4 %**
 %-change from 2019 to 2020: **-16.4 %**
 %-change from 2019 to 2021: **0 %**
 %-change from 2019 to Jan-Apr 2022: **55.2 %**

INBOUND JOB SEARCH:

Inbound search share in 2022: **3.4 %**
 %-change from 2019 to 2020: **-11.1 %**
 %-change from 2019 to 2021: **-27 %**
 %-change from 2019 to Jan-Apr 2022: **-46 %**



Spain

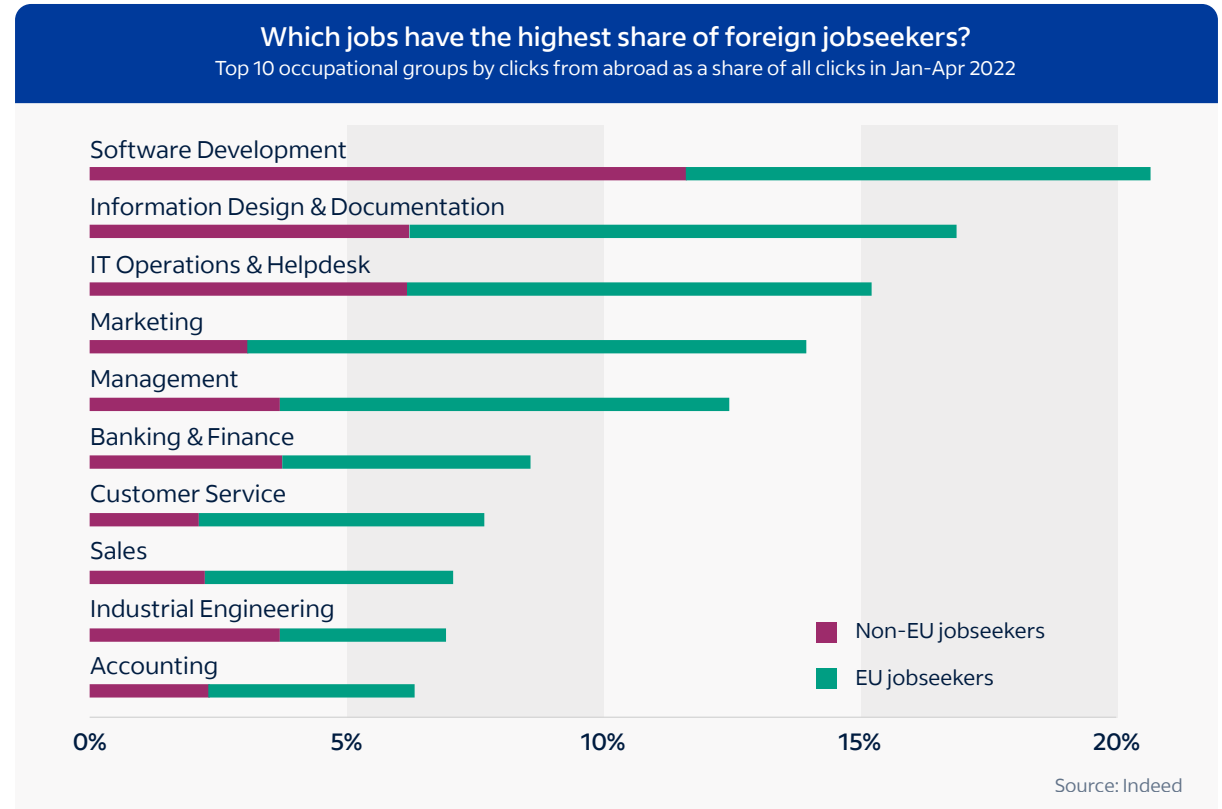
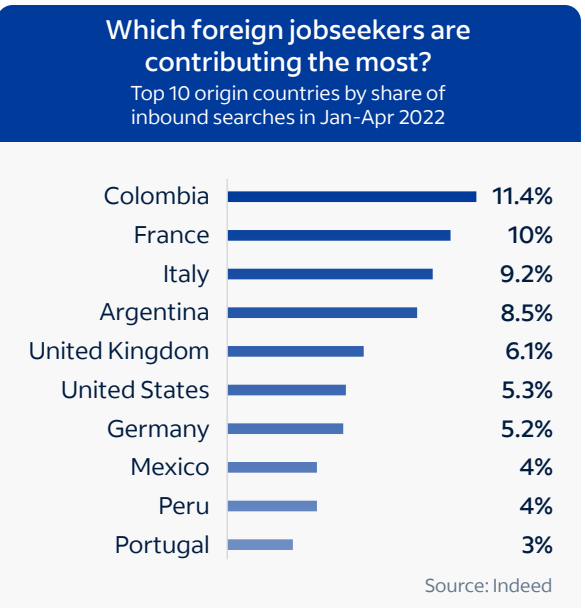
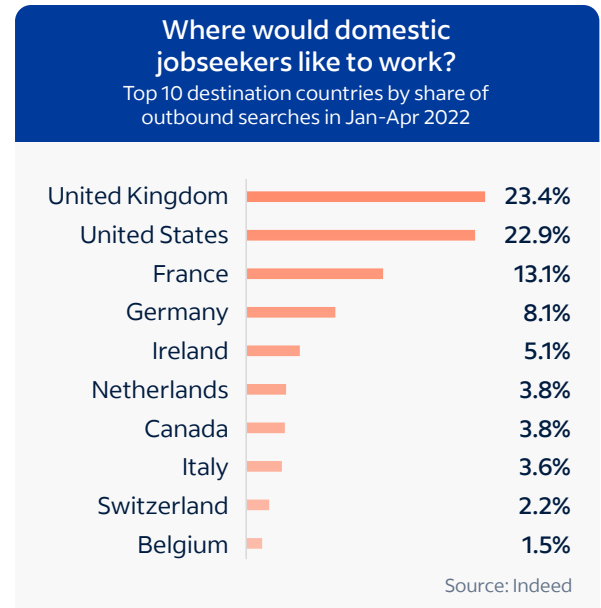
NET INTEREST SCORE
 2021: -0.129 Jan-Apr 2022: -0.097

OUTBOUND JOB SEARCH:

Outbound search share in 2022: **8%**
 %-change from 2019 to 2020: **-19.8%**
 %-change from 2019 to 2021: **-13.2%**
 %-change from 2019 to Jan-Apr 2022: **-12.1%**

INBOUND JOB SEARCH:

Inbound search share in 2022: **6.7%**
 %-change from 2019 to 2020: **-34.5%**
 %-change from 2019 to 2021: **-28.7%**
 %-change from 2019 to Jan-Apr 2022: **-23%**



Sweden

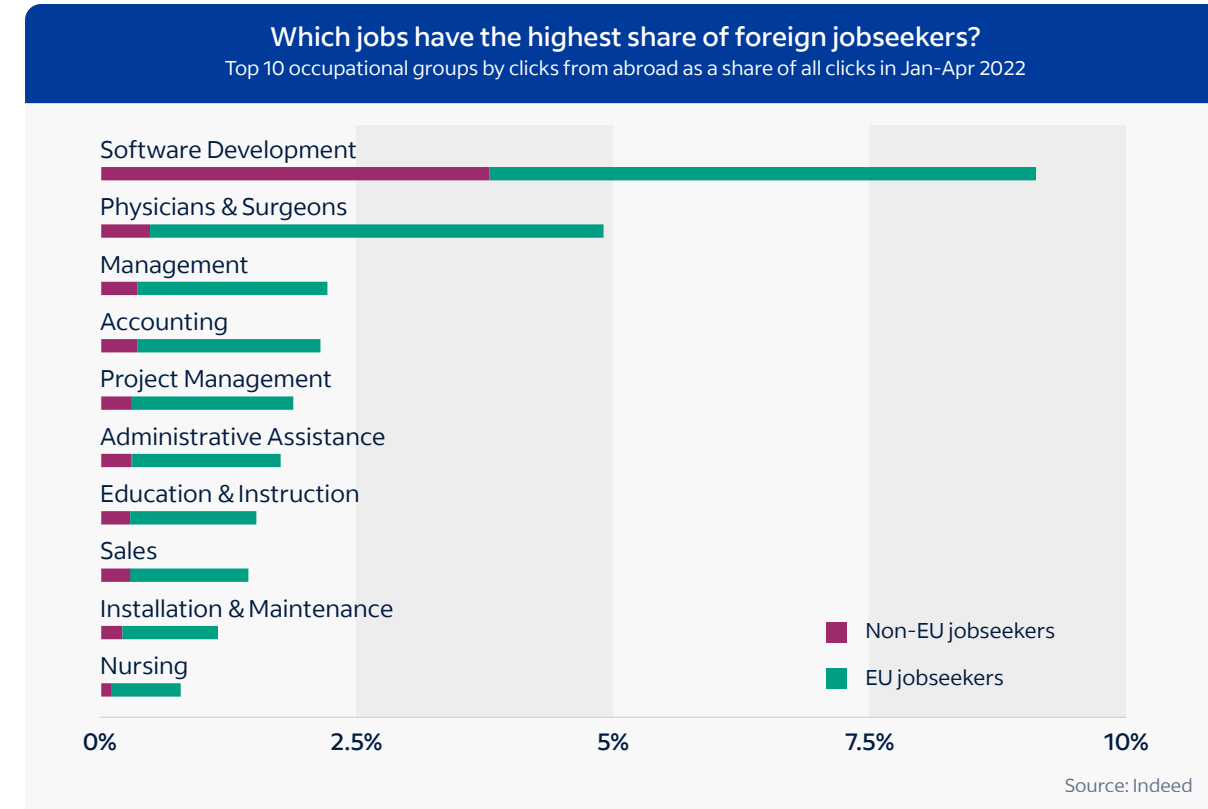
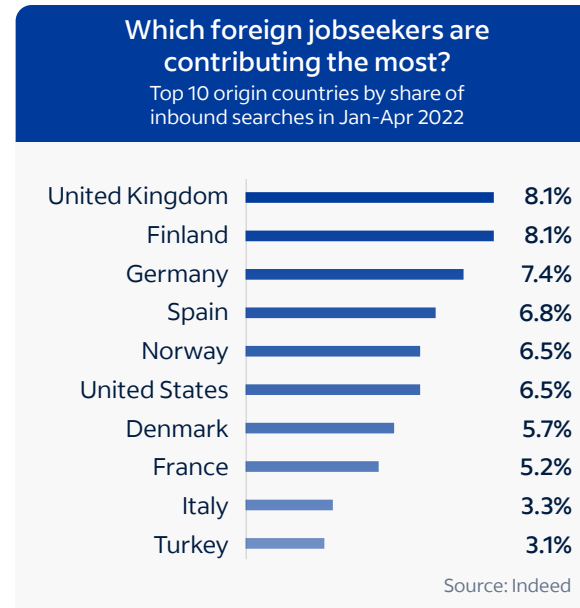
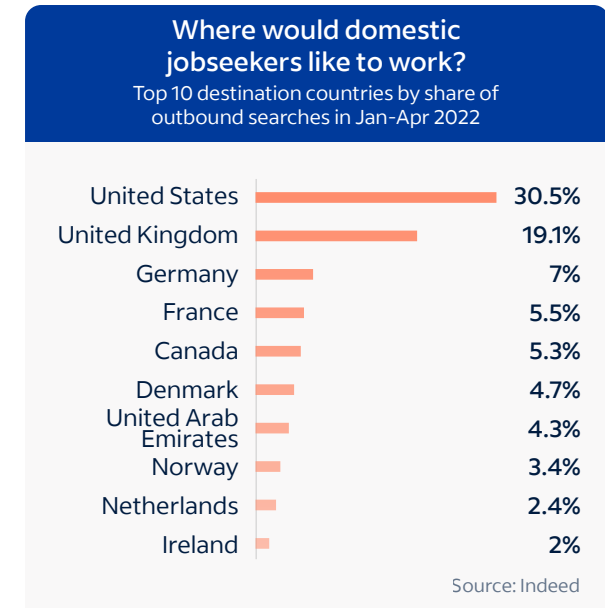
NET INTEREST SCORE
 2021: -0.287 Jan-Apr 2022: -0.324

OUTBOUND JOB SEARCH:

Outbound search share in 2022: **5.1%**
 %-change from 2019 to 2020: **-21.2%**
 %-change from 2019 to 2021: **-25.8%**
 %-change from 2019 to Jan-Apr 2022: **-22.7%**

INBOUND JOB SEARCH:

Inbound search share in 2022: **2.7%**
 %-change from 2019 to 2020: **-25.6%**
 %-change from 2019 to 2021: **-28.2%**
 %-change from 2019 to Jan-Apr 2022: **-30.8%**



Switzerland

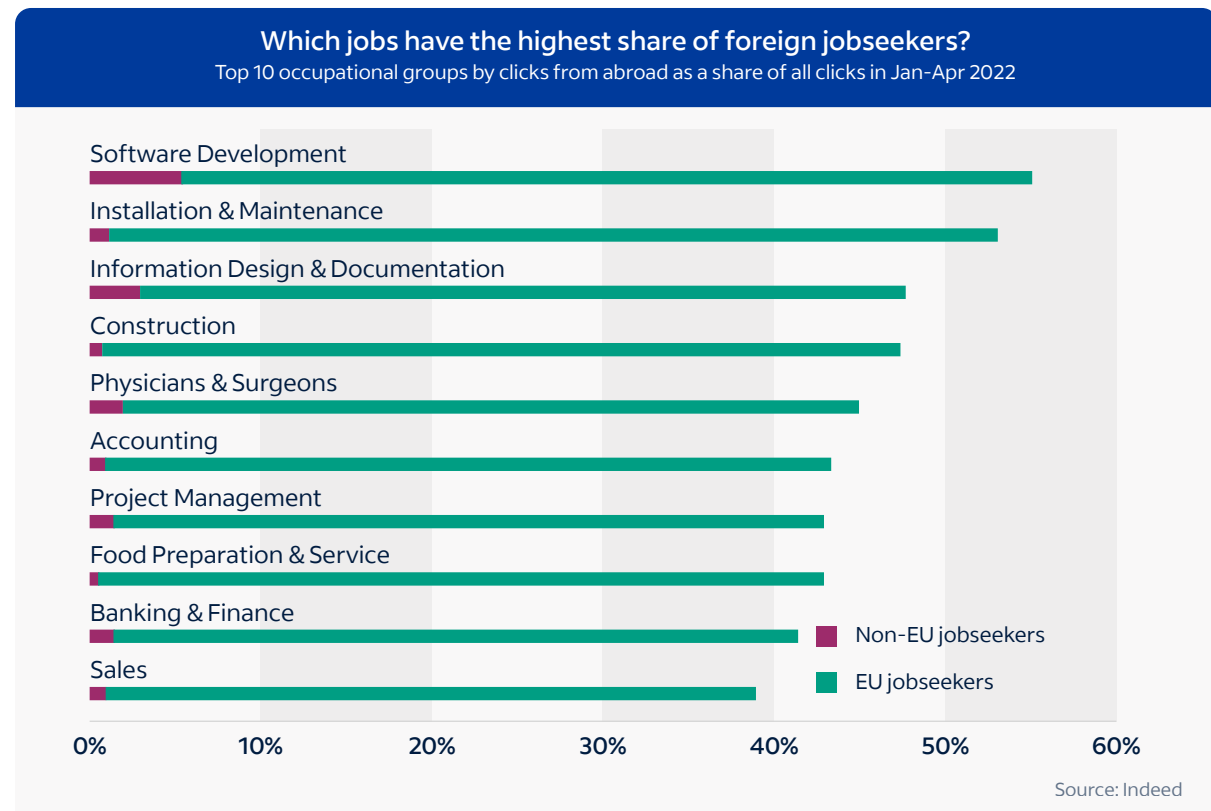
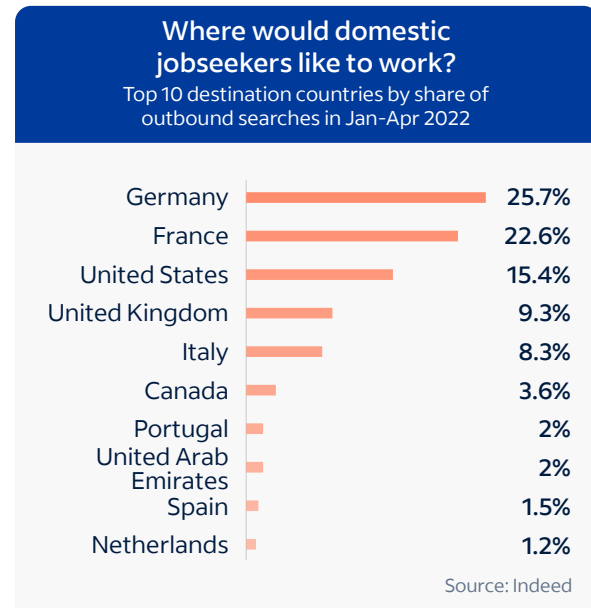
NET INTEREST SCORE
 2021: 0.599 Jan-Apr 2022: 0.606

OUTBOUND JOB SEARCH:

Outbound search share in 2022: **11.4 %**
 %-change from 2019 to 2020: **-6.9 %**
 %-change from 2019 to 2021: **4 %**
 %-change from 2019 to Jan-Apr 2022: **12.9 %**

INBOUND JOB SEARCH:

Inbound search share in 2022: **34.4 %**
 %-change from 2019 to 2020: **6.6 %**
 %-change from 2019 to 2021: **17.3 %**
 %-change from 2019 to Jan-Apr 2022: **26.9 %**



UK

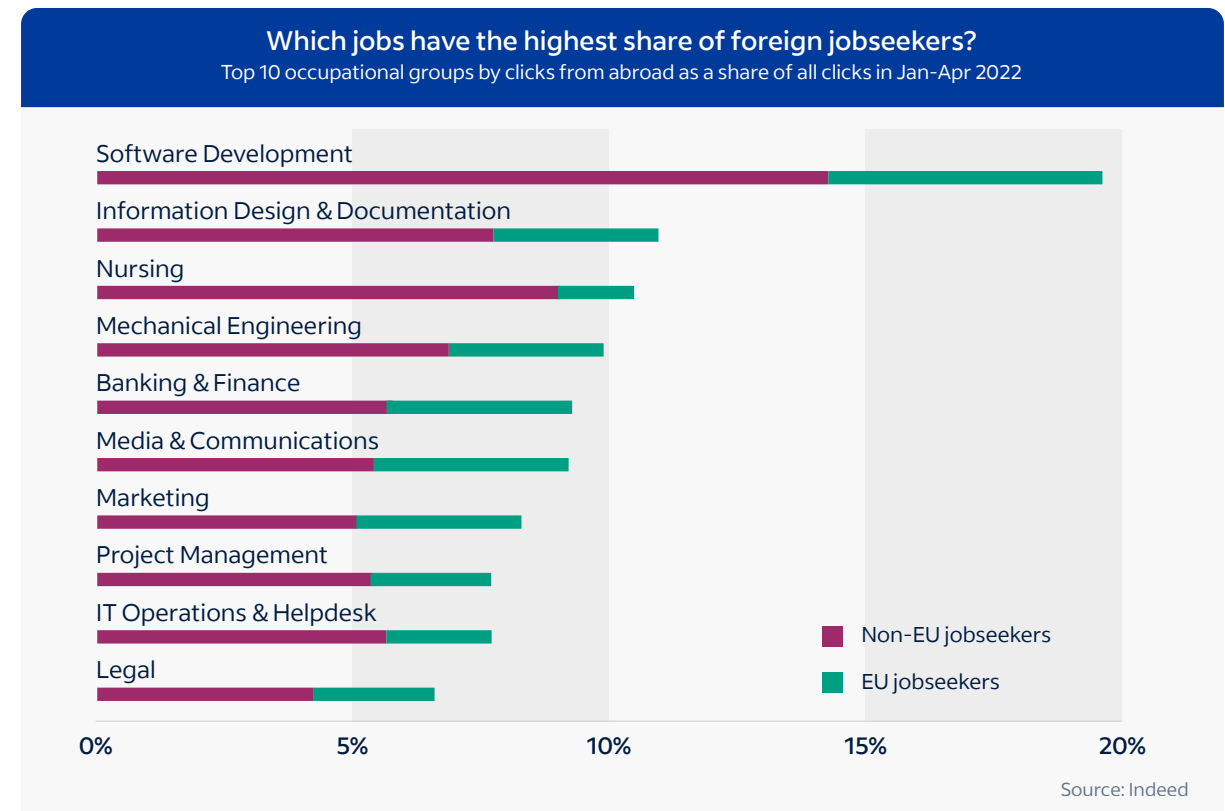
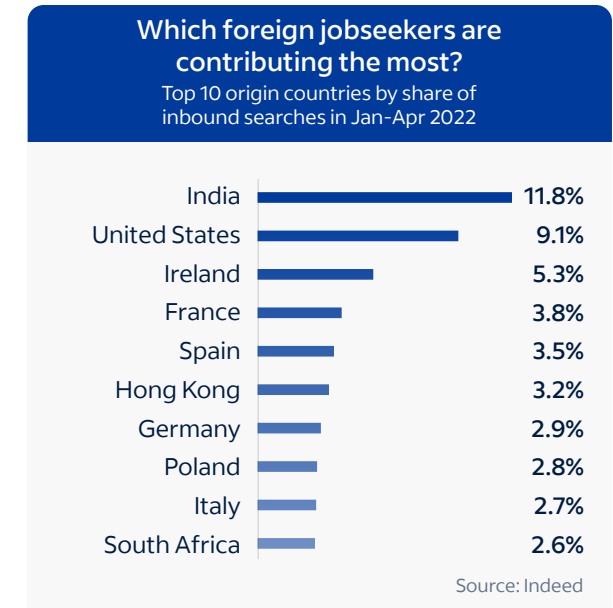
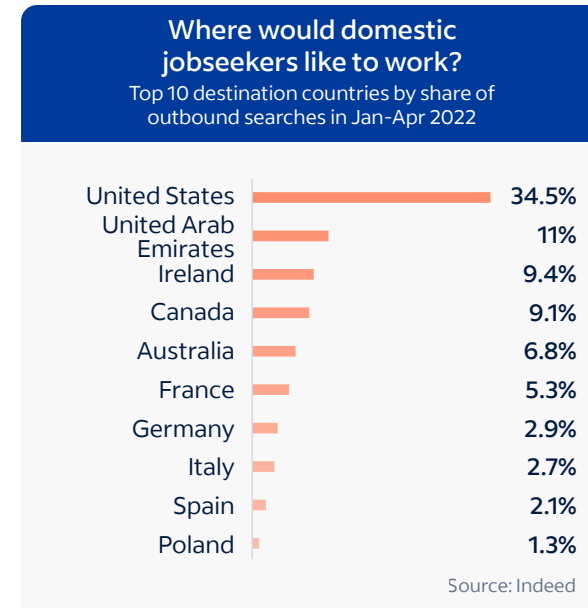
NET INTEREST SCORE
 2021: 0.399 Jan-Apr 2022: 0.474

OUTBOUND JOB SEARCH:

Outbound search share in 2022: **1.4 %**
 %-change from 2019 to 2020: **-27.3 %**
 %-change from 2019 to 2021: **-36.4 %**
 %-change from 2019 to Jan-Apr 2022: **-36.4 %**

INBOUND JOB SEARCH:

Inbound search share in 2022: **3.9 %**
 %-change from 2019 to 2020: **-8.8 %**
 %-change from 2019 to 2021: **-5.9 %**
 %-change from 2019 to Jan-Apr 2022: **14.7 %**



Methodology

Indeed is the [world's largest job site with over 250 million unique visitors every month \(ComScore, Total Visits, March 2021\)](#). It operates in over 60 countries and 28 languages.

Scope

This report is based on the largest dataset of its kind, containing anonymised information on over 800 million cross-border job searches carried out on Indeed between January 2019 and April 2022, and over 100 million job postings. We complement the Indeed data with publicly available data on migration and public health restrictions and GDP, as well as insights derived from surveys of employers and workers carried out by Indeed and Censuswide in eight countries in March 2022.

For the purposes of this analysis, we define Europe as the European Economic Area plus Switzerland and the UK. The European Economic Area consists of the 27 countries of the European Union as well as the three countries of the European Free Trade Association: Iceland, Liechtenstein and Norway.

Indeed data

Our analysis of Indeed data focuses on aggregated and anonymised data on job postings shown on Indeed sites around the world, as well as jobseeker search behaviour on those sites.

Job searches

A job search takes place when a user enters a query in the “What?” and/or the “Where?” search boxes on an Indeed website. User information is anonymised and aggregated, so that it cannot be tracked to individual users. Any automated searches are removed in order to capture genuine jobseeker activity.

The Indeed country website used for the search is recorded, as well as the country of the user’s IP location. This is relevant to define domestic and cross border searches. A domestic search is one performed by a user whose IP location is in the same country as the Indeed website on which they performed the search. A cross-border search is one performed by a user located in a country different from the one of the Indeed website used to perform the search.

Clicks

A click is the user action of clicking on a job posting in the search results, which opens up the full job description. We interpret this as a demonstration of interest in a specific listed position. Although the intensity of the interest is difficult to measure, the aggregated volume of clicks categorised by type of job posting (occupation, salary, whether the posting is remote or not, etc.) can provide useful insights. Like in the case of searches, data on clicks is anonymised and cannot be tracked back to individual users.

Job postings

The job posting data we use for research is from publicly available information shown on the relevant Indeed website. It is important to note that we are not restricted to advertisers on Indeed. Instead, Indeed also collects job postings from thousands of internet sources and de-duplicates them so that when the same job is collected from multiple sources it is shown only once to limit double-counting.

In order to obtain insights from job postings, we use a custom taxonomy that classifies postings into occupational categories based on job titles. In this report, to be able to compare occupation-level data for France, Germany and the UK in a meaningful way, we only use categories that accounted for at least 0.1% of all job postings in 2019. In all other countries, we additionally used occupational categories that accounted for a smaller proportion of total job postings, as long as they had a minimum of 1,000 postings per year. A full list of categories is available in the [Indeed job postings tracker](#), which shows regularly updated trends in job postings for a selection of countries.

We also extract data on advertised salaries from job postings that contain such information. In this report we only use data from postings that listed an annual salary in Q1 2022 to give a flavour of the distribution of advertised pay across occupational categories in Europe’s largest economies.

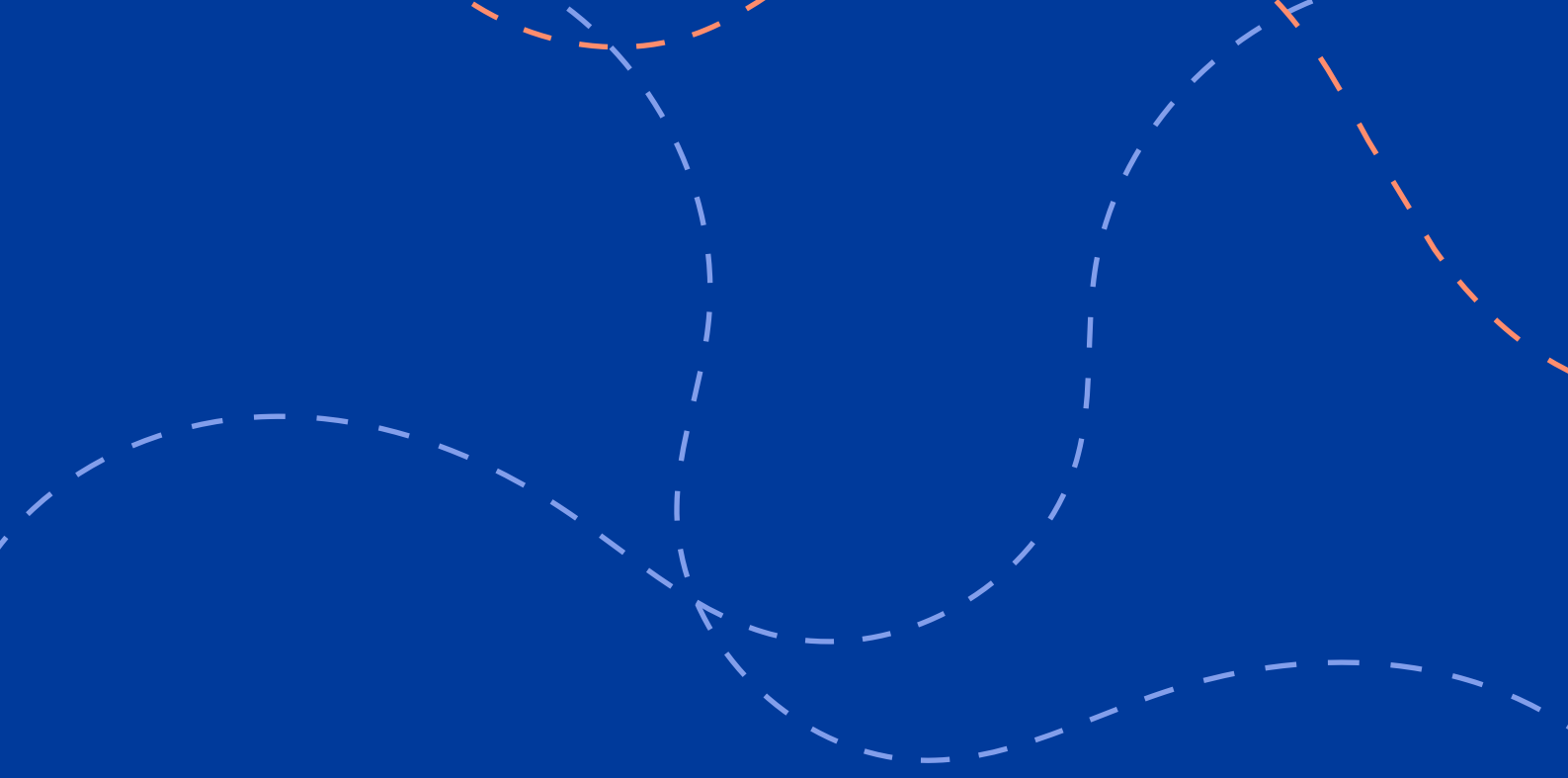
The number of job postings on Indeed.com, whether related to paid or unpaid job solicitations, is not indicative of potential revenue or earnings of Indeed, which comprises a significant percentage of the HR Technology segment of its parent company, Recruit Holdings Co., Ltd. Job posting numbers are provided for information purposes only and should not be viewed as an indicator of performance of Indeed or Recruit. Please refer to the Recruit Holdings investor relations website and regulatory filings in Japan for more detailed information on revenue generation by Recruit’s HR Technology segment.

Frequently asked questions about Indeed data are available on the [Indeed Hiring Lab website](#).

Survey data

To understand how businesses and individuals are thinking about hiring and working with foreign workers, we surveyed employers and working-age adults in eight European countries – Belgium, France, Germany, Ireland, Italy, the Netherlands, Switzerland and the UK – in the second half of March 2022. The survey was run in collaboration with Censuswide. Sample sizes are provided below.

Businesses:	Individuals:
Belgium: 251	Belgium: 1000
France: 501	France: 2000
Germany: 502	Germany: 2000
Italy: 257	Italy: 1000
Ireland: 250	Ireland: 1000
Netherlands: 250	Netherlands: 1000
Switzerland: 255	Switzerland: 1000
UK: 514	UK: 2000



 indeed