



Europe on the Move:

**Cross-Border Job Search in the EU & What It
Means for Employers**

Introduction

The principle of free movement, long-enshrined as one of the central pillars of the European Union, has never been so controversial. Faced with an unprecedented influx of over a million refugees and migrants into the continent in less than 12 months, the leaders of the EU's 28 member countries have struggled to formulate a consistent response to the crisis. Meanwhile, anti-EU parties have surged in the polls in several countries.

But while politicians and the public may debate how best to cope with the continent's worst migration crisis since World War II, the fact remains that within the borders of the EU's 28 member countries, people today face virtually no legal barriers to moving from one country to another. Fences and temporary border checks aside, freedom

of movement is a given. And not only can EU citizens move anywhere, they have the right to work anywhere in the bloc—visa and work-permit free.

Today, many Europeans take advantage of this right and a significant amount of cross-border job search on Indeed is performed within the borders of the EU. In Europe, cross-country job search data is not only a measure of jobseeker interest in migrating between countries. It represents an interest that could easily be—and which regularly is—translated into an actual move.

In this report, we take a close look at migration patterns and EU job search data to find out who is moving where and why—and what this means for employers.

Section 1

Who's moving, where they're going — and why

Since there are no bureaucratic obstacles preventing EU citizens from moving to wherever they please, a great deal of migration occurs within the continent. In fact, according to Eurostat, about 47% of migration of working-age people, those between the ages of 15 and 64, to EU member states in 2013 consisted of cross-border movement by citizens from elsewhere in the bloc. In total, this translates to approximately 1.2 million EU citizens moving between EU borders in 2013 alone (Eurostat 2015a)—and that is a conservative estimate as these official numbers omit people who did not register as immigrants in the country of their arrival.

That's a lot of people on the move. However, not all countries are equal when it comes to immigration and the wide differentiation between economies

and levels of opportunity in the EU leads to a clear hierarchy of interest. Digging deeper into the data, we see a significant variation across countries (see Table 1). In Luxembourg, the share of registered foreign immigrants from within the EU stood the highest at 78%, while the figure sank to a low of 6% in Romania. Meanwhile, all of the Benelux countries (Belgium, Netherlands, and Luxembourg) scored higher than 50%, as did Austria, Denmark, and Germany. The United Kingdom by contrast came in just below the median at 45%.

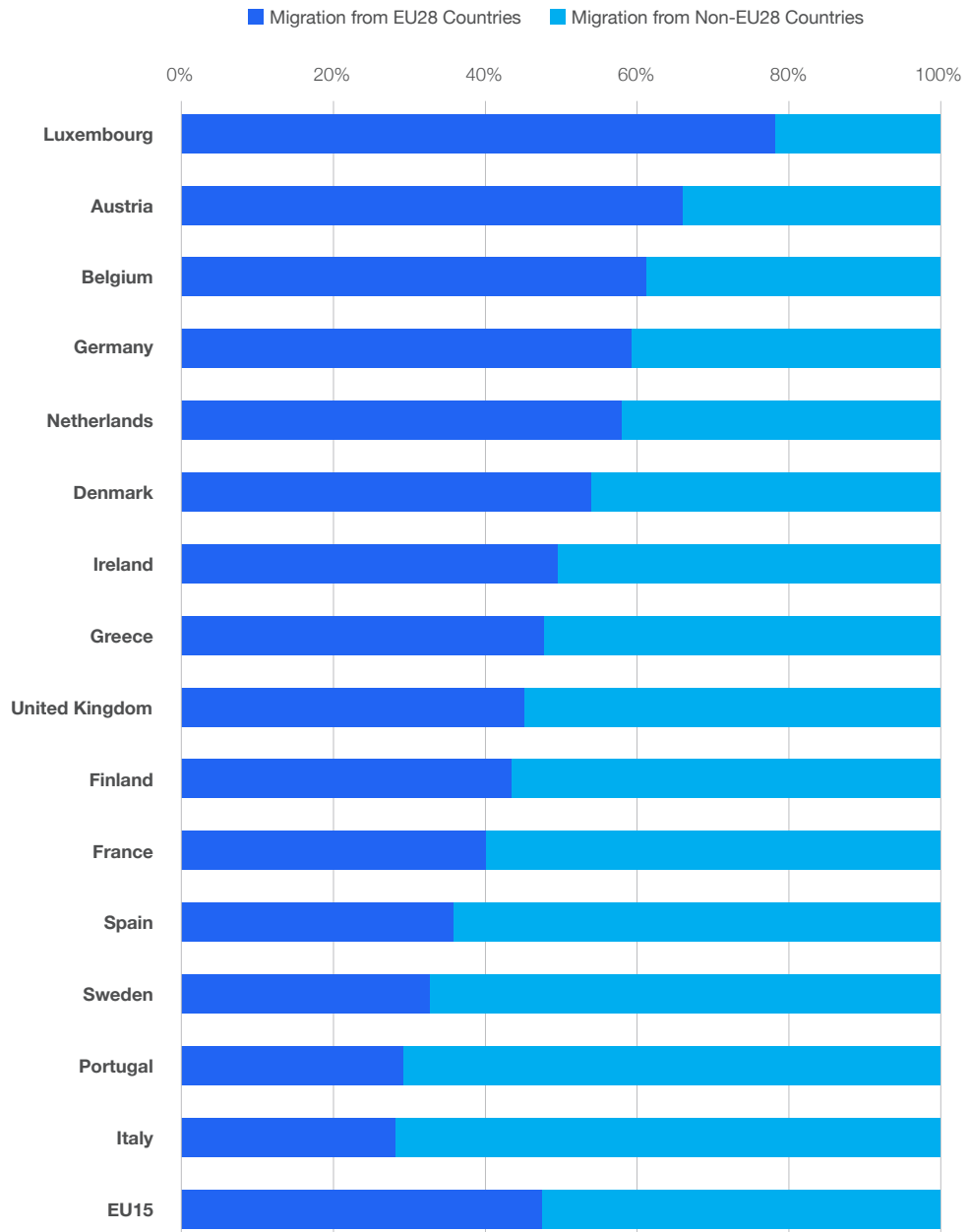
In fact, with the exception of Italy and Portugal, all of the original EU15 member states¹ have a share of EU working-age immigrants ranking higher than 30% (Eurostat 2015b). These results highlight the mostly east-west and south-north nature of intra-EU migration patterns.

1. Austria, Belgium, Germany, Denmark, Spain, Finland, France, United Kingdom, Greece, Ireland, Italy, Luxembourg, Netherlands, Portugal and Sweden

Table 1

Luxembourg Ranks Highest for Percentage of EU Citizens Among New Migrants

Working-age (15-64) EU28 immigrants as a share of total foreign immigration to EU15 countries, 2013

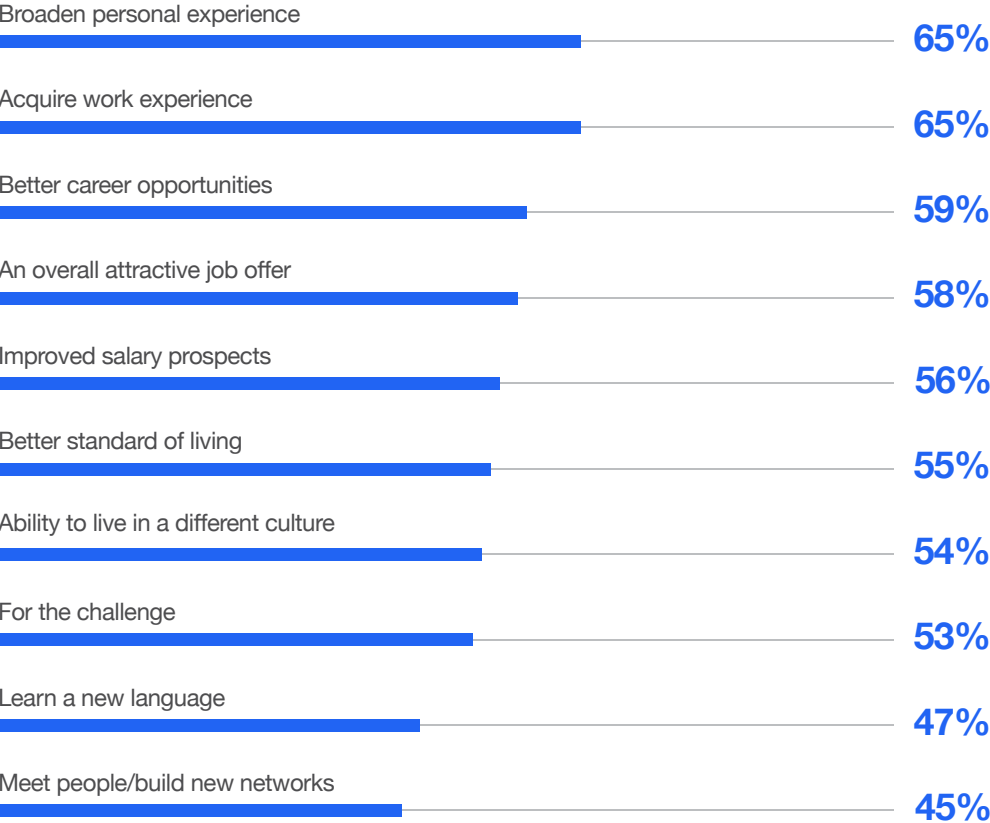


Source: Eurostat 2015b

2. Excluding return migration to the country of citizenship

But what is it that motivates people to uproot themselves from their homeland and move to live and work elsewhere? It is, after all, a dramatic, stressful and risky step to take. A recent study conducted by the Boston Consulting Group and The Network looked at data from a survey of more than 200,000 people in 189 countries to shed some light on the matter. Factors related to personal development, professional experience, job opportunities and salary consistently ranked among the top five triggers for a move (see Figure 1) (Strack et al. 2014).

Figure 1
Why do people move?
Top reasons for considering a foreign work assignment



Source: Boston Consulting Group and The Network 2014

As the results show, finding and assessing the right professional opportunity is a crucial factor for many when it comes to considering—and deciding on—a cross-border move. For employers, a better understanding of international jobseeker search patterns can provide insight into who is moving to the countries where they operate and what impact this will have upon local pools of talent.

Section 2

What search trends tell us about the European jobseeker

2.1 Searches that start in Europe, stay in Europe (most of the time)

Of course, official figures date quickly and the immigration numbers in Table 1, interesting as they may be, are from two years ago. Fortunately, Indeed data can complement these insights by providing up-to-date information on international job search—deepening our understanding not only of the extent and direction of jobseeker interest, but also of how intentions evolve and eventually translate into actual cross-border movement. To find out where people look for jobs in Europe today, we analyzed the searches³ across the borders of the core EU15 countries (most of which are net recipient countries, unlike the EU as a whole) between January and September 2015.

First, we discovered that if a search happens in Europe, the jobseeker usually stays in Europe. In fact, 95% of job searches originating in the EU15 are for opportunities within that same group of countries. Meanwhile, when it comes to searches outside of Europe, only the United States receives sizable numbers, and even then the overall percentage is not high.

On average, 4% of all EU15 searches are directed at the US but these countries are leading that pack.



Denmark
13.2%



Luxembourg
10.7%



Greece
9.8%



Ireland
9.7%

3. The terms 'search', 'job search' and 'jobseeker' are used interchangeably throughout this analysis. They all refer to a job search performed on our website from a distinct mobile/desktop device or user account. This means that users performing more than one search to the same country from the same device or user account will be counted only once.

As for search in Europe, interest is focused primarily on three countries: the United Kingdom, Germany, and France. The UK is the real champion of European job search however, with significant flows coming to the island from virtually every other EU15 country—as Table 2 reveals.

Table 2
Indeed EU15 Movers Index

Cross border job search activity as a share of origin country total searches (Jan-Sept 2015), %

■ Share of job search that is local
 ■ Primary destination of cross-border job search
 ■ Secondary destination of cross-border job search

Origin Source: Indeed

	AT	BE	DE	DK	ES	FI	FR	UK	GR	IE	IT	LU	NL	PT	SE
AT	83.5	0.03	0.50	0.13	0.04	0.08	0.02	0.02	0.18	0.04	0.08	0.49	0.03	0.04	0.07
BE	0.10	89.34	0.09	0.23	0.12	0.07	0.06	0.06	0.22	0.06	0.07	6.20	1.05	0.17	0.15
DE	12.56	0.46	96.56	2.19	0.47	0.73	0.20	0.20	1.49	0.43	0.41	7.73	0.53	0.44	0.84
DK	0.03	0.01	0.03	85.74	0.02	0.07	0.01	0.01	0.08	0.02	0.02	0.09	0.01	0.04	0.38
ES	0.19	0.21	0.18	0.32	94.35	0.24	0.23	0.18	0.15	0.29	0.31	0.69	0.11	0.80	0.25
FI	0.02	0.01	0.01	0.20	0.02	92.96	0.00	0.01	0.04	0.01	0.01	0.08	0.01	0.02	0.22
FR	0.34	3.89	0.37	0.87	0.78	0.44	97.02	0.31	0.57	0.38	0.42	17.79	0.21	1.13	0.56
UK	1.89	1.24	1.22	7.10	3.23	3.68	1.29	98.52	9.47	12.71	1.57	6.12	1.22	4.45	3.72
GR	0.03	0.01	0.04	0.03	0.01	0.01	0.00	0.01	86.16	0.01	0.01	0.07	0.01	0.01	0.03
IE	0.12	0.09	0.08	0.32	0.23	0.20	0.08	0.31	0.26	85.61	0.12	0.48	0.06	0.29	0.18
IT	0.50	0.42	0.29	0.46	0.30	0.23	0.17	0.17	0.49	0.22	96.82	1.23	0.11	0.15	0.25
LU	0.05	0.31	0.14	0.05	0.02	0.02	0.19	0.01	0.07	0.02	0.02	55.97	0.01	0.06	0.02
NL	0.58	3.87	0.39	0.74	0.24	0.24	0.11	0.15	0.56	0.11	0.11	1.23	96.57	0.28	0.44
PT	0.04	0.09	0.04	0.08	0.13	0.04	0.09	0.04	0.03	0.05	0.02	1.66	0.03	92.09	0.04
SE	0.07	0.02	0.05	1.55	0.06	0.99	0.02	0.02	0.24	0.03	0.03	0.18	0.03	0.05	92.83

Destination

2.2 The most desirable countries in Europe

What else can the data tell us about the modern European jobseeker? Overall, one out of every three individuals (34%) searching for a job abroad is looking in another EU15 country, but the searches are not evenly split—not even close. A grand total of 75% of this traffic goes to the UK, France, Germany, Netherlands and

Belgium. At the lower end, a much smaller 16% is split almost evenly between Spain, Italy and Ireland (see Table 3).

Of course, larger economies can be expected to draw greater numbers of workers and potential migrants. But that makes the rank achieved by smaller countries such as the Netherlands, Belgium and Ireland—which receive as much interest as Italy and Spain—all the more striking.

Table 3

United Kingdom is the Most Desirable Country for EU15 Job Seekers

Top countries by inbound share of EU15 cross-border job search (Jan-Sep 2015)

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

In fact, search data reveals that some of the EU's smaller economies are among those showing the highest concentration of interest from jobseekers elsewhere in the EU15. Size, in other words, is not everything—and so employers in these countries are in a competitive position when

it comes to attracting EU talent. As Table 4 shows, Luxembourg, Belgium and the Netherlands are the three countries with the highest concentration of EU15-originated inbound traffic. When it comes to inter-European job search, small can be highly attractive.

Table 4

Small is Attractive: Luxembourg #1 for Concentration of EU15 Inbound Searches

Percent of all searches from abroad that come from other EU15 countries

Luxembourg	85.0%	Sweden	46.5%	Finland	37.2%
Belgium	70.8%	Austria	46.4%	Portugal	36.9%
Netherlands	59.0%	Greece	44.2%	France	32.9%
Denmark	48.6%	Germany	40.3%	Spain	29.3%
Ireland	48.0%	Italy	38.2%	United Kingdom	25.8%



2.3 Who are the most EU-oriented jobseekers?

As for countries where a large proportion of international search is directed at other EU nations, we find that—as Table 5 reveals—smaller countries such as Luxembourg and Belgium also rank highly. Here, however, they rub shoulders in the top ten with larger countries struggling with high unemployment rates, such as Greece, Spain, Portugal and Italy.

It is understandable, of course, that people in crisis-stricken southern European countries are looking for work elsewhere in the EU. What is interesting is that when jobseekers in better-performing Benelux economies look abroad they too are most likely to be looking in other EU countries, rather than beyond the borders of the bloc. It is likely that the cultural and linguistic affinities with their neighbors make them

less “adventurous” and more EU-oriented when it comes to job search.

It seems, then, that a sunny climate and excellent food are no substitute for employment possibilities. And in fact, jobseekers located in countries with healthy labour markets and low unemployment rates such as Germany and the UK show relatively little interest in searching for opportunities in other EU countries. For Germany, there is a great deal of interest in Switzerland, a non-EU country (job seekers in France are also very interested in working there). Similarly, a significant number of Swedes regularly look for opportunities in Norway (another non-EU country). In the United Kingdom, a large share of outbound job search is aimed at the United States rather than other EU nations.

Table 5

The most EU-oriented jobseekers

Percent of searches going abroad that go to other EU15 countries

Luxembourg	71.1%	Spain	48.4%	Finland	37.7%
Belgium	66.5%	Portugal	46.3%	Sweden	37.5%
Austria	64.1%	Netherlands	45.9%	France	37.1%
Greece	49.8%	Italy	43.4%	Germany	35.9%
Ireland	49.6%	Denmark	40.4%	United Kingdom	15.3%

What does this mean for employers?

Those based in countries where people are actively searching for opportunities should strive to leverage this comparative advantage to attract EU jobseekers. By doing so they will be able to more effectively tap into an international talent pool and improve their firm's ability to satisfy pressing recruitment needs. In particular, through exploiting their knowledge of geographical variation in EU jobseekers' interest, employers could better target highly mobile pockets of talent willing to move within the EU, but with specific location preferences.

However, employers located in countries that are less appealing to EU jobseekers, may need to use different strategies to make their firm more attractive. For example, by using incentives such as relocation bonuses and competitive packages, companies can help alleviate a significant part of the expense and risk a candidate faces when considering a move.

In addition, employers can also use information on where jobseekers are searching to make strategic choices in terms of where to locate satellite offices, where to focus specific sourcing efforts or how to better target sponsored jobs campaigns. In short, a deeper understanding of search patterns can be used to make recruitment strategies more data-driven and thus, more effective.



2.4 The Indeed EU15 Net Interest Score

For employers, the amount of new talent arriving on their doorstep is only half of the picture. To understand how much talent is available in a location, you also have to know how much of the local population you can draw upon. Are you keeping people as well as losing them to opportunities elsewhere? That's where the Indeed Net Interest Score can provide valuable insight.

Here's how it works: By calculating interest from European jobseekers inside and outside a country as a share of all incoming and outgoing job search originating in any other EU15 country, we are able to rank countries according to how much interest they attract overall. Countries at the top of the list receive the most interest from European jobseekers while countries at the bottom are losing people to cross-border migration, while also failing to attract new European talent—a potentially costly combination.

Table 6
Indeed EU15 Net Interest Score

Inbound searches minus outbound searches over the sum of the two (Jan-Sep 2015)

United Kingdom	0.39	Belgium	-0.14	Sweden	-0.29
Luxembourg	0.32	Ireland	-0.20	Portugal	-0.31
Netherlands	0.08	Spain	-0.21	Denmark	-0.46
France	-0.06	Italy	-0.25	Finland	-0.52
Germany	-0.06	Austria	-0.27	Greece	-0.78

Strikingly, the UK is the only large European country with a positive EU15 net interest score—even an economic powerhouse such as Germany is negative. Meanwhile if we expand the indicator to include traffic to and from Indeed's other markets, we find that the UK enjoys a net inflow of interest not only from jobseekers in Europe but from all across the globe—an 'excess' interest that amounts to 39% of all inbound and outbound traffic in the country.

In short, more jobseekers would like to move to the UK than are looking to to leave it. When it comes to talent, British employers are comparatively spoiled for choice as their location acts as a magnet for talent from Europe and beyond. British employers need to compete less for foreign talent than their counterparts on the continent, which puts recruiters in a strong position. But just how strong, and how long it can be expected to last, we will explore in the next and final section.

United Kingdom: the promised land for EU jobseekers?

In fact, Britain's status as a global immigration hotspot and all-round talent magnet is not always viewed as a cause for rejoicing within the UK. Following the 2015 general election, prime minister David Cameron reaffirmed the ruling Conservative Party's commitment to cutting net migration to "tens of thousands." The Conservatives also pledged to hold a referendum on whether or not to stay in the EU. The possibility of a British exit—or "Brexit"—could be in the cards if the "nos" win, which would almost certainly have a strong impact on cross-border work patterns. Britain also stands outside collective

attempts to resolve Europe's refugee crisis, and declined to participate in the quota scheme intended to share the load of new immigrants across EU countries, preferring to adopt its own solutions.

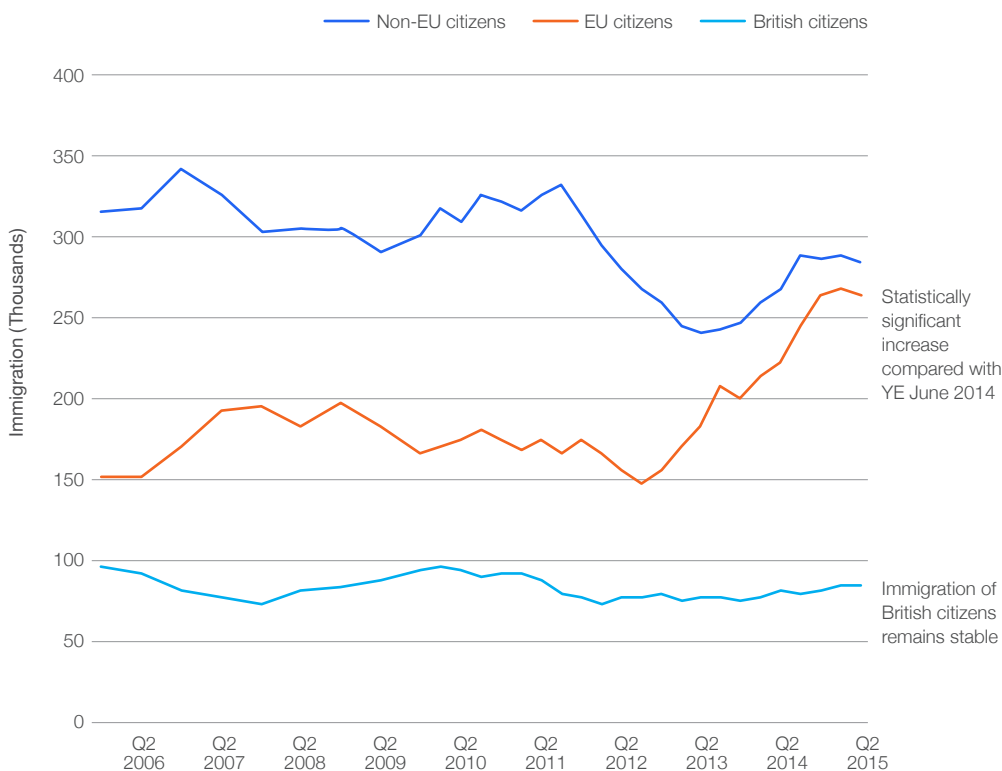
Regardless of this ambivalence over immigration, the UK continues to be a very popular destination for jobseekers. Nearly four out of every ten EU15 job searches takes place on [Indeed.co.uk](https://www.indeed.co.uk). In fact, Britain receives about three times as much interest from EU jobseekers as either of the next two most popular destinations—Germany and France.

The latest immigration numbers from the Office for National Statistics (ONS) confirm the continuing popularity of the UK as a destination for European jobseekers (see Figure 2). Covering the year ending in June 2015, the data shows a statistically significant increase of 19% in long-term immigration to the UK by EU citizens. Of those coming for work reasons, 55% were from other countries in the EU. Since 2012 the marked increase in the number

of EU citizens entering the UK has come at the expense of immigration from outside the bloc. Several factors contributed to this shift, such as changes to British immigration policies that made it harder for non-EU citizens to migrate into the UK and the enlargement of the EU to include new members in Central and Eastern Europe, which led to an influx of jobseekers from former communist states.

Figure 2
United Kingdom is a Popular Destination for EU Citizens

Immigration to the UK by citizenship, 2005 to 2015 (year ending June 2015)



Source: ONS 2015

However, even if the UK is the most popular destination among EU15 jobseekers, this traffic only amounts to 26% of all job searches coming from abroad. A further 28% is comprised of job searches originating in the United States and India—two countries that share strong linguistic and cultural ties with Britain. In fact, Indian and US nationals were granted the second and third highest number of UK visas in the year ending in September 2015, according to British Home Office statistics (Chinese nationals were granted the most, showing the importance of economic ties between the two countries) (GOV.UK 2015).

The UK’s imperial legacy continues to have a strong impact on its immigration patterns generally. The top 20 countries for job searches in the UK includes seven Commonwealth countries—India, Australia, South Africa, Canada, Malaysia, Pakistan, and New Zealand—alongside eight EU15


countries and two other EU28 countries (Poland and Romania.) Combining the numbers, we find that the top twenty sources of talent for the UK account for 71.5% of all the job searches coming into the country from abroad. Seventeen of these twenty countries are either members of the Commonwealth or of the European Union, while the remaining three are the US, UAE and the Philippines. The seven Commonwealth countries and ten EU countries account respectively for 26% and 27% of all inbound job search traffic on Indeed.co.uk: Together they provide more than half (i.e. 53.4%) of all inbound traffic.

Clearly, then, lower barriers to entry in terms of weaker or no visa requirements have a significant impact upon cross-border job search. And as a result, British employers have large populations of talent to draw upon relative to many other nations.

Table 7
United States, India and Ireland Are Sending the Most Job Search to the UK

Top 20 Global Sources of Job Search in the United Kingdom (Jan-Sep 2015)

1. United States	11. Canada
2. India	12. United Arab Emirates
3. Ireland	13. Romania
4. France	14. Netherlands
5. Australia	15. Malaysia
6. Spain	16. Greece
7. Germany	17. Philippines
8. South Africa	18. Pakistan
9. Italy	19. Portugal
10. Poland	20. New Zealand



However, international job searches in the UK reflect not only the country's attractiveness to people beyond its borders but also the reliance of the British economy upon foreign labour and particularly skilled foreign labour. The most recent Home Office statistics recorded a rise in the number of Tier 2 "skilled migrant" visas issued, with the largest increases registered in the Human Health and Social Work sector (GOV.UK 2015). And so, as the UK economy grows, demand for migrant workers remains high.

Indeed data corroborates this trend. When tracking the top twenty keywords used by jobseekers from the US, India, Ireland, France and Australia (the top five sources of foreign jobseekers looking in the UK) we find high incidences of keywords such as "care assistant", "nurse" or "NHS" that are associated with sectors currently experiencing talent shortages. In addition, we find words related to higher skill jobs such as "marketing," "project manager" or "software engineer"—as well as other less skilled, but currently in-demand roles such as "sales assistant" and "driver."

What does this mean for employers? Well, while UK firms may be in a stronger position than their European counterparts when it comes to attracting international talent, this situation may not last forever. Any policies implemented by the British government aimed at making it more difficult for foreign workers from Europe or other countries to obtain visas and work in the UK could have negative consequences for companies and organisations that have grown accustomed to relying on international sources of talent to fill their open positions.

And so—considering the significance that EU immigration has for Britain today—employers should pay close attention to the ongoing debate about whether or not the UK should stay in the EU. An important question to ask is: what would the immigration status of the roughly three million EU citizens currently residing in the country should be in the event of a "Brexit"? And at the same time: How would the UK make up for the steady source of talent supplied by EU citizens moving to Britain?

Conclusion

Even though today's job search behaviour is increasingly global, in most countries migration policies still limit the ability of jobseekers to move across borders. Within the EU, however, people face virtually no legal barriers to migration. This makes EU cross-border job search flows highly revealing for people interested in understanding how job search activities translate into actual moves.

For employers in particular, a deeper understanding of search patterns can provide valuable insights into the challenges they will face when it comes to finding the talent they need. In some countries, international interest is high, and European firms can leverage their location to tap into the mobile EU talent pool. Knowledge of

geographical variation in EU jobseekers' interest, can also help employers make decisions about where to locate branch offices, and how to target groups of talent with specific location preferences.

Employers located in countries that struggle to attract EU jobseekers may have to consider other incentives when it comes to filling the talent gap with international candidates. For instance, relocation bonuses and competitive packages can help mitigate the risk involved in a move.

There is no doubt however that Europe is a continent on the move—and this is a fact its citizens take for granted. Regardless of the current crisis, that seems unlikely to change any time soon.

Appendices

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Data and methodology

Data sources

The primary source for all Indeed Hiring Lab research is the aggregated and anonymised data from jobseeker and employer behaviour on Indeed. This report is based on jobseeker clicks and employer postings from January 2015-September 2015 in EU15 countries.

The job posting data on Indeed includes millions of jobs from thousands of sources. It is important to note that Indeed job postings do not reflect the precise number of jobs available in the labour market, as an opening may be listed on more than one website and could remain online for a period of time after it has been filled. Moreover, employers sometimes use a single job posting for multiple job openings. However, the data do represent a broad measure of each job title's share of job openings in the labour market.

Indeed Movers Index

Using job search data from the 15 country sites within the EU15 we measured the share of searchers from each of the 15 countries that are interested in jobs in each of the countries within the EU15. Each data point represents the searchers from country_x searching for jobs in country_y / searchers from country_x searching for jobs in any EU15 country. The data points that represent the share of searchers staying in the country of origin are highlighted in green. Any data point with a share higher than 1% is highlighted in red and higher than 3% is highlighted in yellow.

Appendices

Most Desirable Countries

We ranked the EU15 countries from the most desirable (#1) to the least desirable (#10) based on the share of searchers from the 15 countries that are searching in each country. The most desirable countries have the highest share of EU15 jobseekers looking for jobs in those countries. This is only considering outbound searches so searchers in country_x searching for jobs in country_x are ignored.

Highest concentration of EU15 inbound searches

To control for population and search traffic differences we developed a measure of EU15 search concentration in each of the 15 countries. The shares represent the number of EU15 searchers outside of country_x looking for jobs in country_x / all searchers outside of country_x searching in country_x. The countries at the top of the ranking have relatively more EU15 jobseekers than non EU15 jobseekers searching in those countries.

Most EU-oriented jobseekers

The opposing measure to the highest concentration of EU15 inbound traffic, this measure is focused on outbound search traffic. The shares represent the number of searchers in country_x searching in all other EU15 countries / searchers in country_x searching in all other countries. The countries at the top of the ranking have relatively more jobseekers looking in other EU15 countries than jobseekers looking in non EU15 countries.

Net Interest Score

Indeed's Net Interest Score combines a measure of how many people are interested in coming to a country and how many people are interested in leaving. For each of the EU15 countries, the Net Interest Score calculates effective interest from jobseekers inside and outside a country as a share of all incoming and outgoing job search based on the following equation $(\text{inbound} - \text{outbound}) / (\text{inbound} + \text{outbound})$. Those markets with a positive reading have more jobseeker interest flowing into the country than out, while countries with a negative reading have more interest flowing out of the country.

Appendices

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About us

About the Author

Mariano Mamertino is an economic research analyst at Indeed. Mariano's analysis contributes to reports, blogs, and research bulletins from the Indeed Hiring Lab, a global research institute committed to advancing the knowledge of job seekers and talent acquisition professionals worldwide. He studies Indeed data on how people are searching for jobs to better understand the state of the global labor market.

Mariano holds a B.S. and a M.S. in Economics from Bocconi University. In the past, he has worked as a research fellow at Central European University, in Budapest, and as a junior research officer at the International Labour Organization (ILO), in Geneva. He is among the authors of the ILO's flagship report "World of Work 2014: Developing With Jobs" and he has collaborated on several institutional and academic publications. His main research interests are skills, job matching, job search/hiring practices and labor markets.

About us

About the Indeed Hiring Lab

The Indeed Hiring Lab is a global research institute committed to advancing the knowledge of human resource and talent management professionals worldwide. Under the direction of Chief Economist Tara M. Sinclair, PhD, the Indeed Hiring Lab is developing original research using proprietary Indeed data to uncover exclusive insights into the labour market.

In addition to conducting research, Indeed economists are frequently invited to brief the media on economic and labour trends as well as offer commentary. They have been quoted in the New York Times, the Wall Street Journal, the Washington Post, the Irish Times and have appeared on CNN, C-Span, NPR, Fox Business, Bloomberg Radio and TV, and many other local and international news programs.

About Indeed

As the world's #1 job site, with over 180 million unique visitors every month from over 60 different countries, Indeed has become the catalyst for putting the world to work. Indeed is intensely passionate about delivering the right fit for every hire. Indeed helps companies of all sizes hire the best talent and offers the best opportunity for jobseekers to get hired.

For more information, visit [indeed.com](https://www.indeed.com).

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