



2021 ADVANCE
SURVEY OF
GLOBAL
AUSTRALIANS
SURVEY REPORT



PRESENTED BY



For a fresh perspective on talent and careers, we are delighted to have Russell Reynolds Associates bring their global leadership expertise for the 2021 Survey.

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SUMMARY

The Covid-19 pandemic has been especially challenging for those who are, or have been, living and working overseas. Yet, Australian expats have once again proven their strength and resilience. As a result, an unprecedented opportunity arises for Australia to harness the power of its diaspora as we reach the third year of one of the most disruptive periods in recent history.

Analysis of the 2021 Advance Survey of Global Australians shows that one third of our diaspora have been abroad for over two decades, and have remained overseas despite the pressures of the Covid-19 pandemic. These individuals represent Australia's most sought after export: the talent pool of global Australians.

These expats are showcasing what Australia has to offer on a global stage. From financial services to science and medicine, from philanthropy to the arts, our diaspora spans across every industry. Coming in at first place, the largest subset of global Aussies work in the Financial and Professional Services sector, followed by IT and Telecommunications, and in third place, Education and Academia.

These talented expats also expressed their interest in continuing a relationship with Australia. Whether this be by mentoring new global Australians, connecting their international networks with Aussies back home, or simply by staying abreast of Australian politics. Despite the challenges associated with participating in Australian elections while living overseas, over 37% of respondents said they planned on voting in the upcoming Federal election.



Of the global Australians surveyed only 7% said they had lost employment, business or investment opportunities in the face of the COVID-19 pandemic. Many of these Aussies have been overseas for an extended period of time, and in some cases, the decision of whether to stay or come home was taken out of their hands due to the impact of strict border measures in Australia. At least two fifths of expats surveyed saw their plans to travel to and from Australia delayed or cancelled, with a further 30% experiencing personal hardship, anguish and frustration at these restrictions. However, their ability to continue in employment and access business or investment opportunities despite this hardship, shows their tenacity and resilience.

As border restrictions lift, many Australian expats are set to return home after long stints overseas. Around 65% of overseas Australians plan to return to Australia to live and work, and of that group, 40% will be back by 2024. With over half (56%) of these returning expats being in senior roles, Australia is set to receive a huge influx of talent into the job market.

Of the expats who have already returned, 42% plan to stay permanently, while almost a third would like to return overseas sometime in the future, and 15% are planning to go back overseas in the next year. Representing a wealth of knowledge across industries, as shown in the diverse categories recognised in the annual Advance Awards, Aussie expats have the ability to steer Australia towards bigger and better things in the post-pandemic era.

While some former expats struggle to find suitable jobs that utilise the skills they have acquired internationally, for many others, the transition from overseas work back to Australia has been successful, with 33% stating they had found a new role. One respondent listed their biggest surprise about returning to Australia as being the career opportunities. However, for the vast majority, Australian expats returned home for a variety of other reasons, such as being close to family, or having their children grow up here. Of these returned Australians, 68% are at the senior end of their careers with strong potential for leadership roles in various industries around Australia and are prepared and capable of globally-facing, decision-making roles. If Australian companies were to utilise the connections these individuals have made while working overseas, Australia would quickly become a much more global country, with plenty of room for international partnerships.



FOREWORD

by Peter O'Brien

Managing Partner

Russell Reynolds Associates



'There is a growing appreciation that Australia needs to become more global and play on the world stage'

Over the past few years, all of us have been facing arguably the most challenging times in our lives and continue to do so. From living through a global pandemic, which no one escaped the impact, to geopolitical tension and volatility, through to economic uncertainty and overall market unpredictability. Then when you only focus on Australia, add in the worst bushfires in history through to flooding and other factors impacting what used to be our normal lives. This world we all live in has been, and will continue to be, extremely challenging and uncertain for the foreseeable future. That said, there is that saying which I feel to be so true today – *'whenever this is a challenge there is also an opportunity'*.

In the last 2 years, we have seen the impact of the pandemic across the global marketplace, where individuals have been restricted from traveling and forced to operate in a virtual world. This has made it more difficult to build relationships and pursue opportunities - impacting organisations and individuals alike. We have seen an increase in Australian companies seeking Australian global talent offshore. There is a growing appreciation that Australia needs to become more global and play on the world stage, thus requiring leaders who both understand the cultural nuances to Australia yet can be effective in operating globally. There is truly the opportunity for Australia, and Australians across the globe, to embrace the uncertain world we live in. To demonstrate the resilience and determined nature that makes up who we are, to succeed for the benefit of both Australia and its citizens. This is going to take leadership and courage, much of which already exists to Australia's advantage - it's how we harness it.



ABOUT THE SURVEY

The purpose of this annual survey is to reveal the characteristics and sentiment of home-grown talent overseas and returning to Australia. In 2021, the survey also sought to describe the experience of expats as a result of Australia's border measures.

The survey is also a means to improve Advance's programs and activities for global Australians, by assessing expats' ongoing connections to Australia and their needs.

Advance.org conducted the 2021 Survey of Global Australians from 4 November 2021 to 17 January 2022. The online survey was distributed through the Advance community and its main digital channels, including: newsletter, website, and social media pages. The survey was also promoted by channel partners such as Australian chambers and associations in key locations around the world (UK, Europe, Middle East, USA, Canada, Southern Africa, China, India, and South East Asia), and community groups of expats overseas and returned.

The target audience for this survey included global Australians who:

- returned to Australia from overseas
- live overseas and are planning to return to Australia
- are permanently living overseas.

For the first time, the survey included questions for:

- Australians planning to go overseas
- Individuals connected to Australia through work, study or relationships.

In 2021, the Global Australian Survey was completely anonymous for the first time, to encourage broad participation, candid responses, and a high survey completion rate.

A total of 729 participants responded to the survey, living in 40 countries or territories. The 729 respondents provide statistically significant results from the Australian diaspora, which is estimated to include around 1 million people. Results are reported with a confidence level of 99% and 5% margin of error.

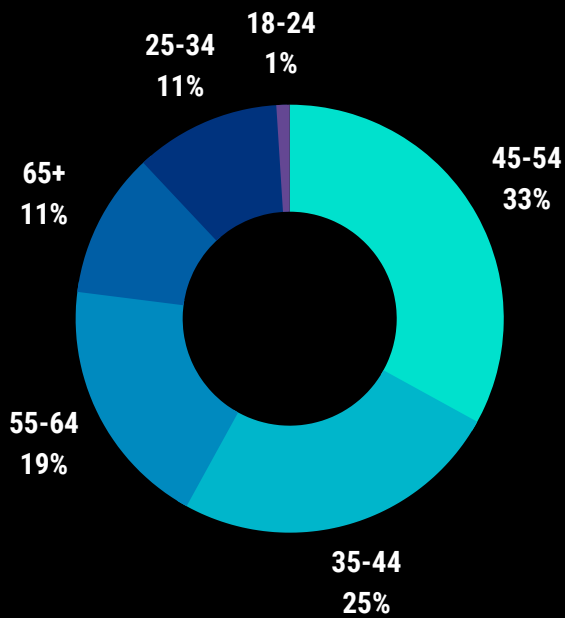
Percentages in this report have been rounded to full integral numbers, but in a few cases for results under one percent, responses are reported with one decimal place to make them informative.



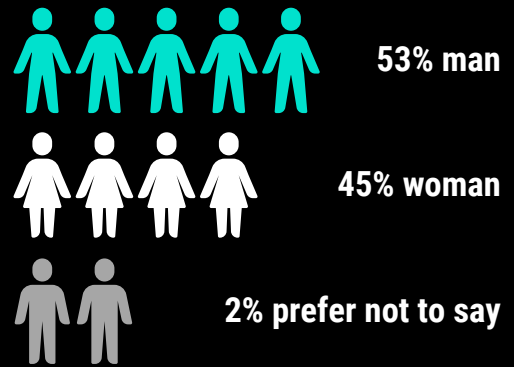
DEMOGRAPHICS

Expat Statistics

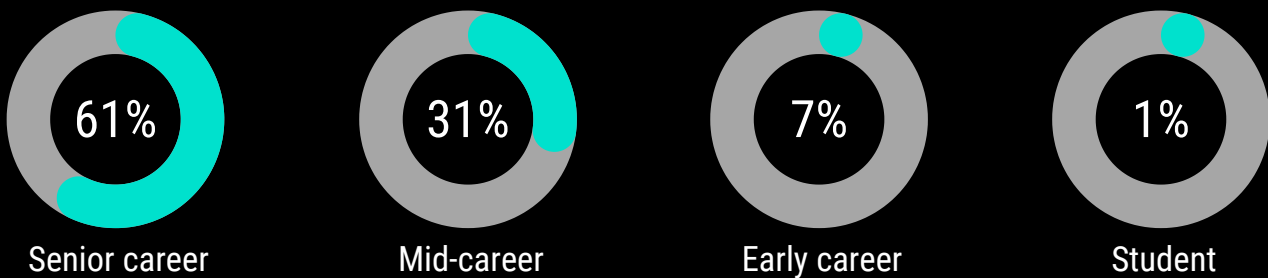
Age groups



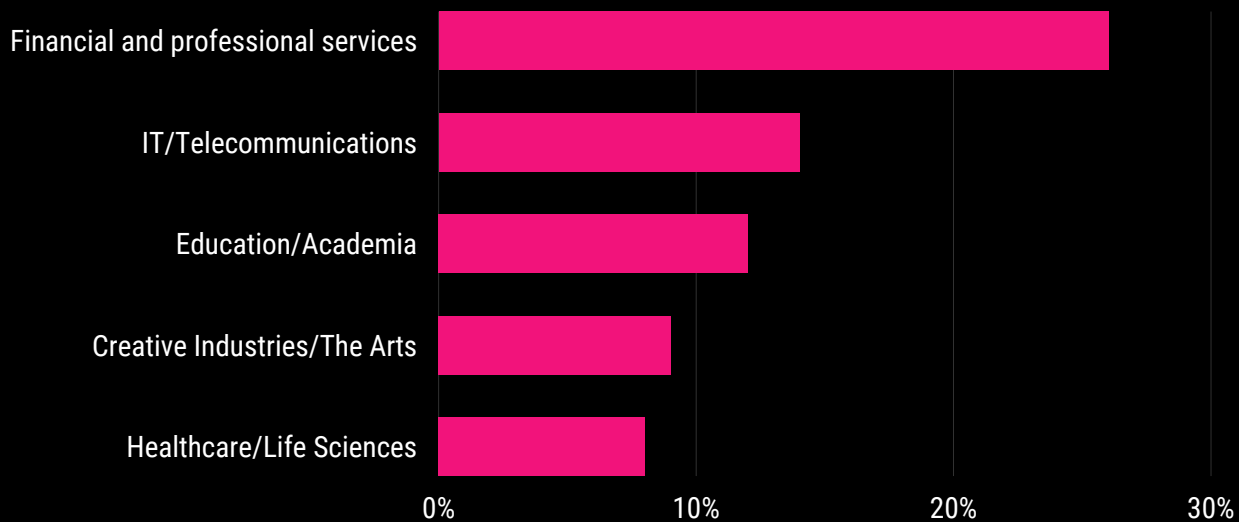
Gender split



Career stage

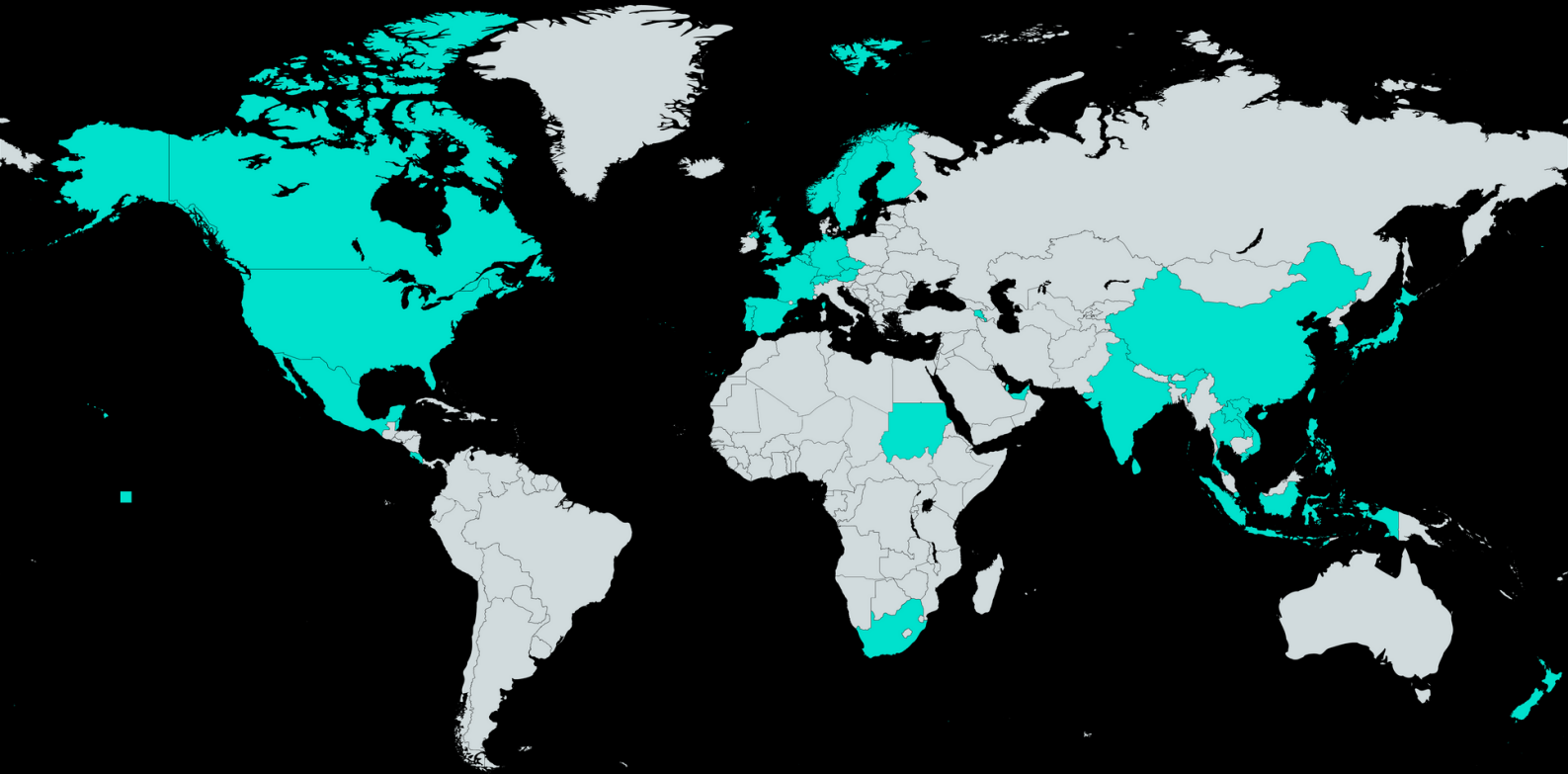


Top industries



The largest proportion of the expat community resides in North America.

Note: This distribution is for survey respondents overseas, and also includes the immediate previous location of recently returned Australians (those who returned after March 2020).



North America 47%

- Canada
- Mexico
- United States of America

Rest of World 2%

- Armenia
- Belize
- Cayman Islands
- Costa Rica
- New Zealand
- South Africa
- Sudan

Middle East 2%

- Qatar
- United Arab Emirates

UK 9%

Europe 6%

- Austria
- Belgium
- Czechia
- Finland
- France
- Germany
- Luxembourg
- Netherlands
- Norway
- Portugal
- Spain
- Sweden
- Switzerland

China 13%

Hong Kong 6%

South Asia 1%

- India
- Sri Lanka

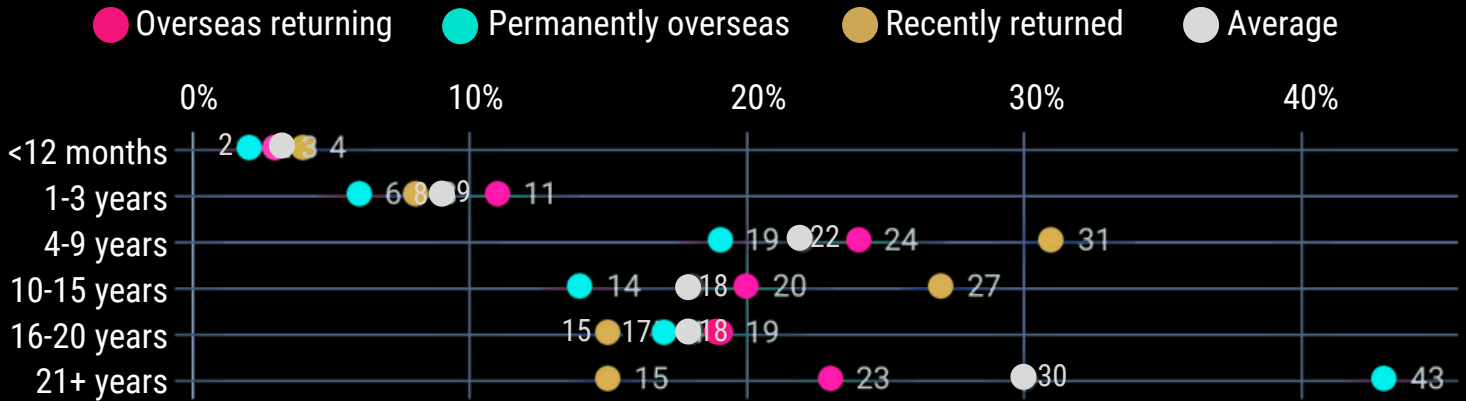
Other Asia 14%

- Indonesia
- Japan
- Laos
- Philippines
- Singapore
- South Korea
- Taiwan
- Thailand
- Viet Nam



Time overseas

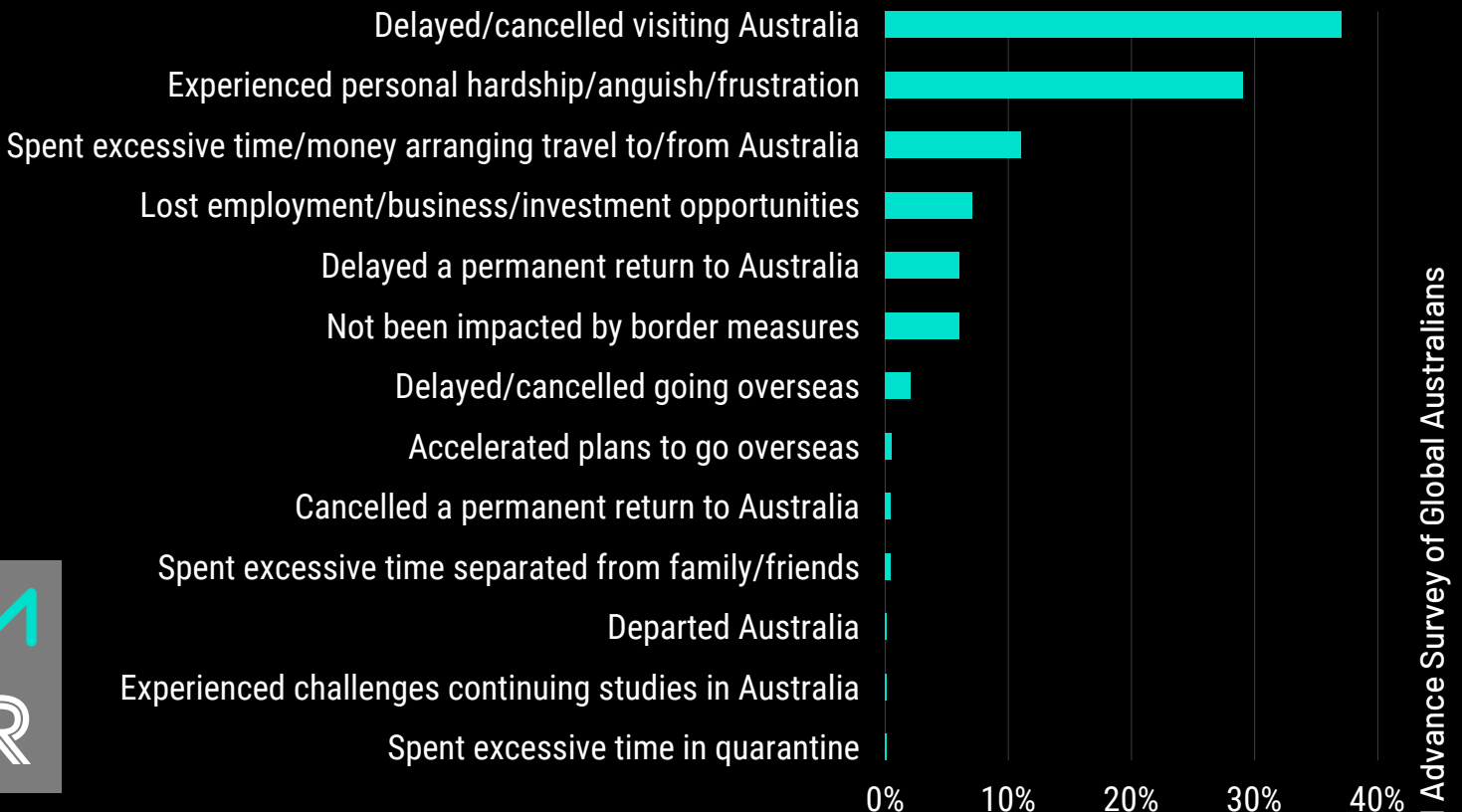
On average, nearly two-thirds (66%) of survey respondents have been overseas for more than a decade, and 30% of respondents have been overseas for more than two decades.



Includes survey respondents overseas, and time spent overseas by recently returned Australians

Borders impact

Most respondents saw their plans to travel to Australia delayed or cancelled (37%). At least 7% indicated that Australia's border measures affected their career (lost employment / business / investment opportunities).



KEY FINDINGS



Expat location. The global Australians surveyed include expats overseas (84%), those who have returned to Australia (12%) and individuals who intend to go overseas at some point in their career (4%). Of those located overseas, the majority live in the United States, China, United Kingdom and Hong Kong.



Time overseas. Almost a third of respondents (30%) have been abroad for over two decades, and have remained overseas despite the pressures of the Covid-19 pandemic. In fact, 35% of those currently overseas intend to live abroad permanently.



Career stage. 61% of total survey respondents identify as holding senior roles. The proportion of respondents holding senior roles is even higher (68%) within the subset of individuals who have returned to Australia, representing a gain for Australia of potential industry shapers and leaders.



Top industries. Of the surveyed global Australians, the number one industry expats work in is the Financial and Professional Services sector (26%), followed by IT and Telecommunications (14%), and Education and Academia (12%).





Reasons to return to Australia. Among those who recently returned to Australia, the top reasons to return are to be near family and friends (25%) and for the lifestyle and quality of life in Australia (19%).



Returnees' plans. Two-fifths of individuals who have returned to Australia since March 2020 plan to stay permanently (42%), while almost a third would like to return overseas sometime in the future (31%), and 15% are planning to go back overseas in the next year. This suggests significant potential for forward-looking employers to grab this talent while they can, and benefit from their international links, even if they leave.



Expat relocation into Australia. Returnees have mostly **settled in** NSW (54%), Victoria (27%), the Australian Capital Territory (8%), Western Australia (8%), and the Northern Territory (3%).



Australian job market. The majority of returned expats surveyed already found a new job in Australia (33%), while 23% are working for their employer overseas. Only 3% indicated they are still looking for a new job.





Challenges of returning to Australia. Rebuilding a professional network remains the biggest challenge for returning expats (33%). Sorting tax/superannuation issues (22%) and finding a place to live/rent (22%) are also major challenges for expats who recently returned, and those who plan to return soon.



Australia's border restrictions. In the last two years, many respondents saw their plans to travel to and from Australia delayed or cancelled (37%), with a further 30% experiencing personal hardship, anguish and frustration at Australia's border measures. At least 7% said they had their career affected as a result of these restrictions.



Staying connected while overseas. Expats overseas are interested in continuing their relationship with Australia. They would like to mentor individuals wanting to go global (28%), and connect their global networks with Aussies back home (17%). And despite the challenge of keeping up with Australia's federal elections when overseas, 37% of respondents said they plan on voting in the upcoming elections.



Surprises about Australia. Global Australians cited the pandemic strict rules (27%) as the one thing that recently surprised them the most about Australia. Most popular responses also include a negative view of Australia's response to the pandemic (14%), the treatment of expats since March 2020 (9%), and the cost of living (5%).



RESULTS: RETURNED AUSTRALIANS



Expats who have recently returned to Australia plan to:

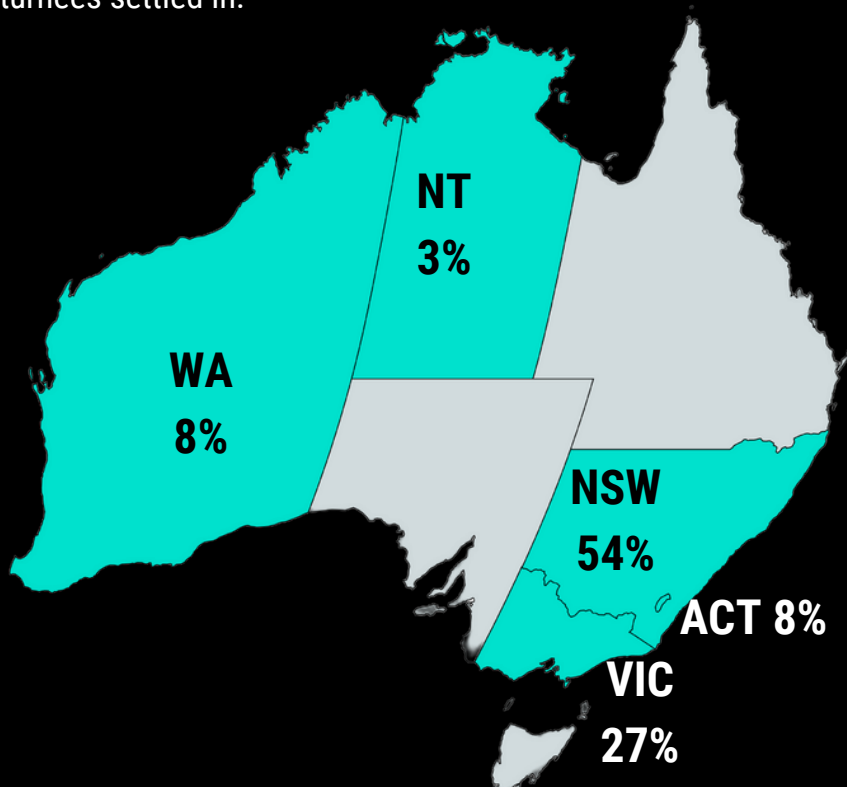
- Stay in Australia permanently (42%)
- Return overseas sometime in the future (31%)
- Return overseas in the next 12 months (15%)

At least 12% of survey respondents from this group are not sure about their plans yet.

Most Australians who came back since March 2020 saw their plans accelerated by Covid-19 (73%), citing being near family and friends (25%) and Australia's lifestyle and quality of life (19%) as their top reasons to return to Australia.

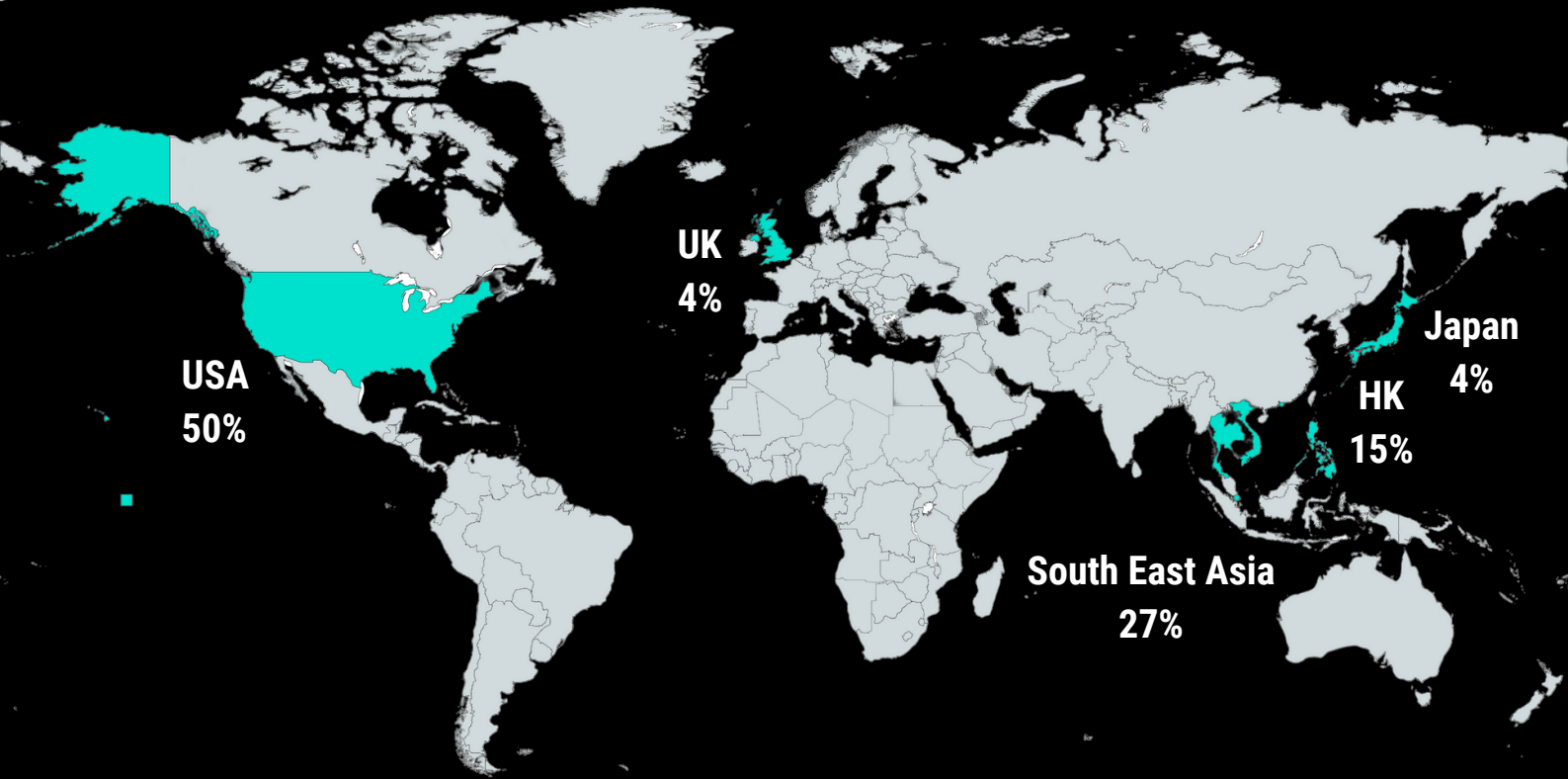
Only 11% of this returning group indicated they returned primarily for career or business opportunities in Australia.

Respondent returnees settled in:



Returned Australians

Before returning to Australia, the top locations where this surveyed group was living were the United States of America (50%), Hong Kong (15%), and Viet Nam (8%).

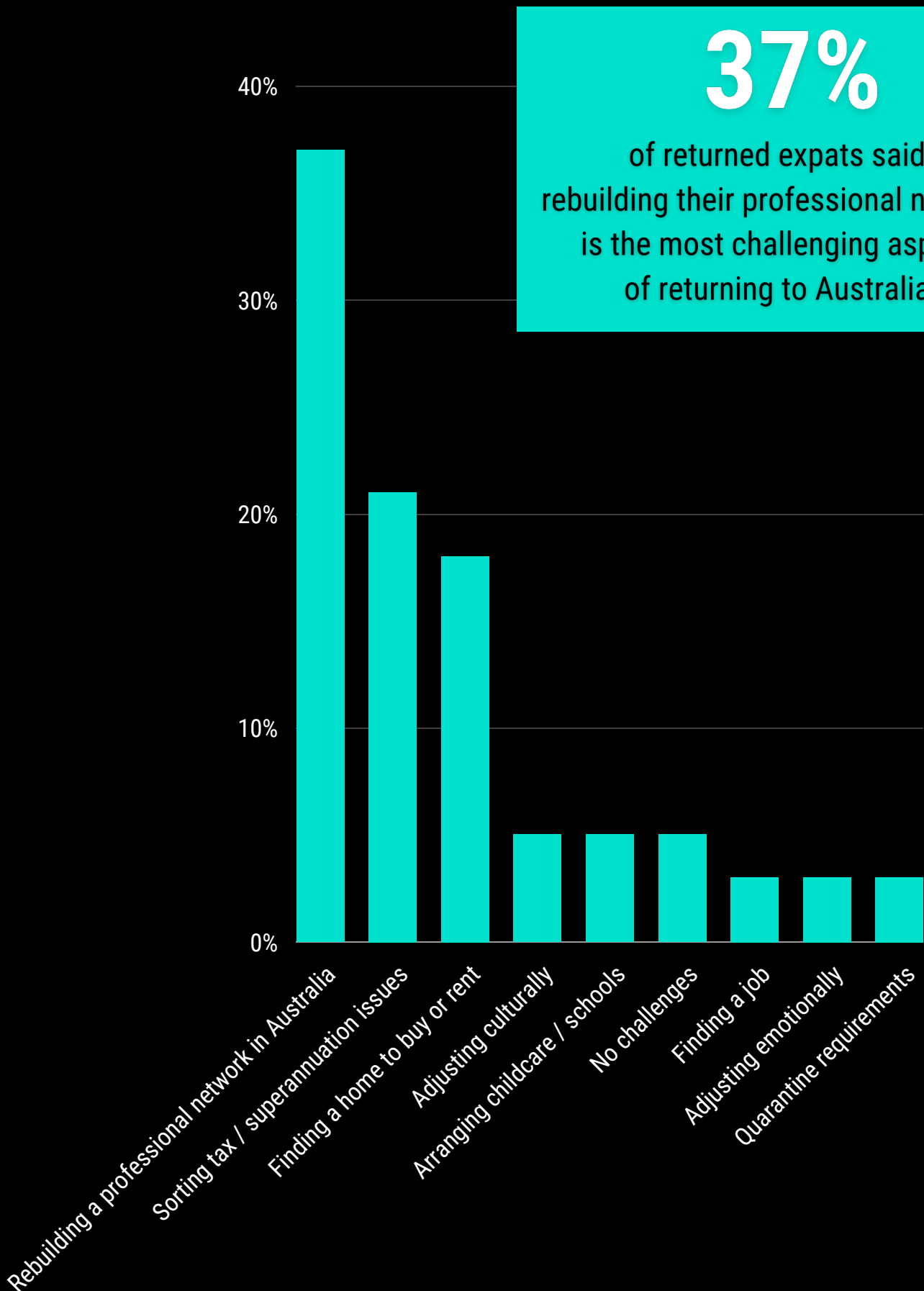


Respondents have chosen various paths upon returning, with the majority already working in a new job in Australia (33%) and at least 3% still looking for work.



Returned Australians

Returning to Australia has been full of challenges for the majority of expats, although 5% of them indicated there were no challenges involved.



First impressions on returning to Australia have been mixed.

Most returning Australians saw their plans to travel to and from Australia delayed or cancelled (30%). This has influenced their perception of Australia and the things they see as 'surprises'.

Most popular responses perceived Australia's management of the pandemic as negative, and the job market as parochial and very domestically focused. In contrast, some respondents found that Australia "handled Covid very well" and that there are many job opportunities for returned expats, especially in advisory roles.

Distribution of responses is shown below, with the most common ones appearing more prominently.



“
What surprised me the most about returning to Australia is how much I missed it, and how many things there are to do for kids.
”

RESULTS: OVERSEAS AUSTRALIANS



Most survey respondents are Australians living overseas (81%). Nearly two thirds of them are planning to return to Australia to live in the future, while the rest most likely will not live in Australia again, citing a variety of reasons.

Respondents who are living overseas are mostly:

- senior-career professionals
- concentrated in high-skill positions and industries, such as Financial and Professional services, Information Technology and Telecommunications, and Education/Academia
- concentrated in major global locations (USA, China, Hong Kong, UK).

Of those currently overseas:

35%

65%

intend to stay overseas permanently

are planning to return to Australia

Expats are planning to return in:

- 3 or more years (29%)
- 1-3 years (24%)
- the next 12 months (16%)

The remaining 32% of this group still haven't decided when to return.

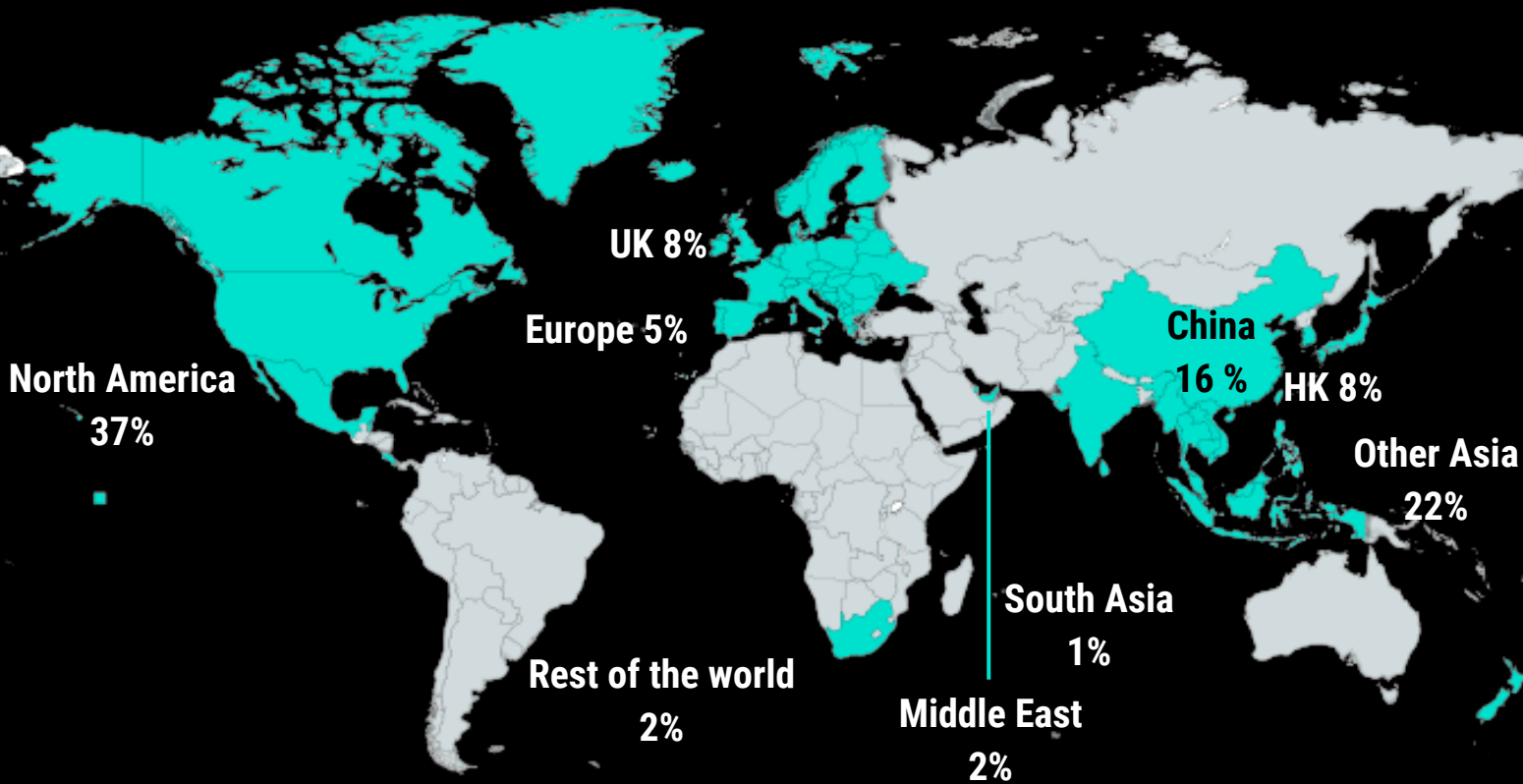
26%

of all overseas Australians
are planning to return home
by 2024

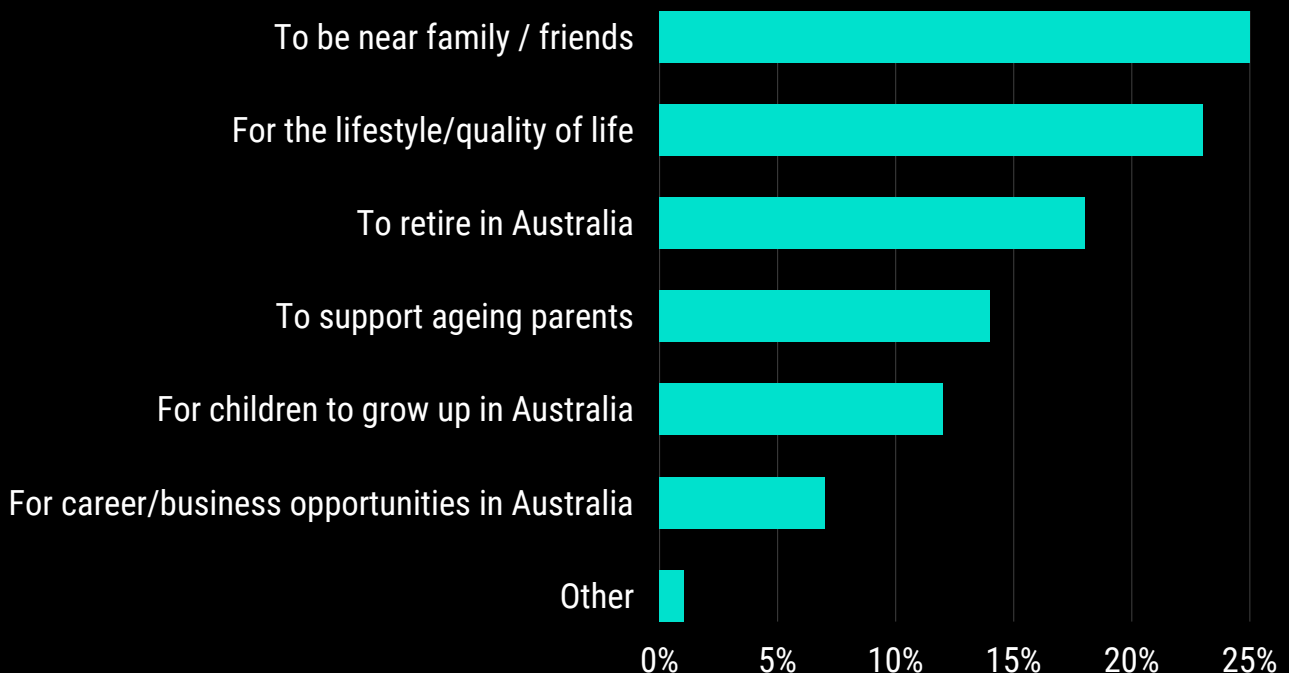
Australians overseas planning to return

Respondents from this group are mostly living in the United States of America, China, Hong Kong, and the United Kingdom.

Their location by region is shown in the map.



This group of expats indicated being near family and friends as the most common reason to return to Australia (25%). At least 7% of respondents said they are returning for career and/or business opportunities in Australia. Other reasons include to study in Australia and as a cultural experience for partners.



Australians overseas planning to return

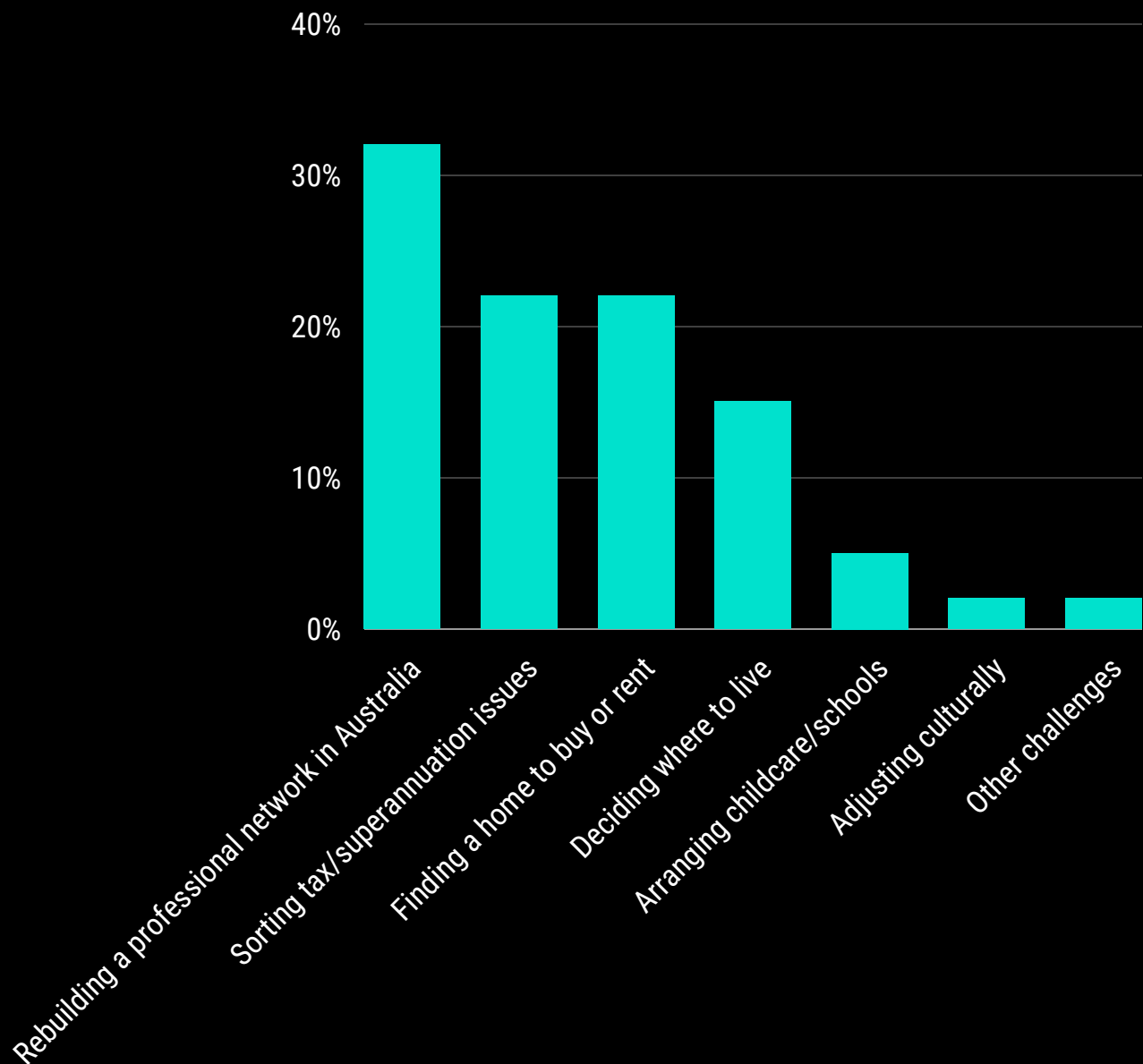
When returning, most of them plan to find a new job (36%) and build their own business (16%).

Among the 18% who indicated they are planning to return for retirement in Australia, 8 in 10 respondents would like to stay active. This includes:

- volunteering with the community (31%),
- joining board or advisory roles (29%),
- mentor people (21%), and
- explore investment opportunities (19%).

The majority of expats planning to return indicated that rebuilding their professional network in Australia would be the most challenging aspect of returning home (32%).

'Other challenges' cited by this group include adjusting emotionally, finding a job, securing income or pension, and arranging healthcare.



Australians overseas planning to return

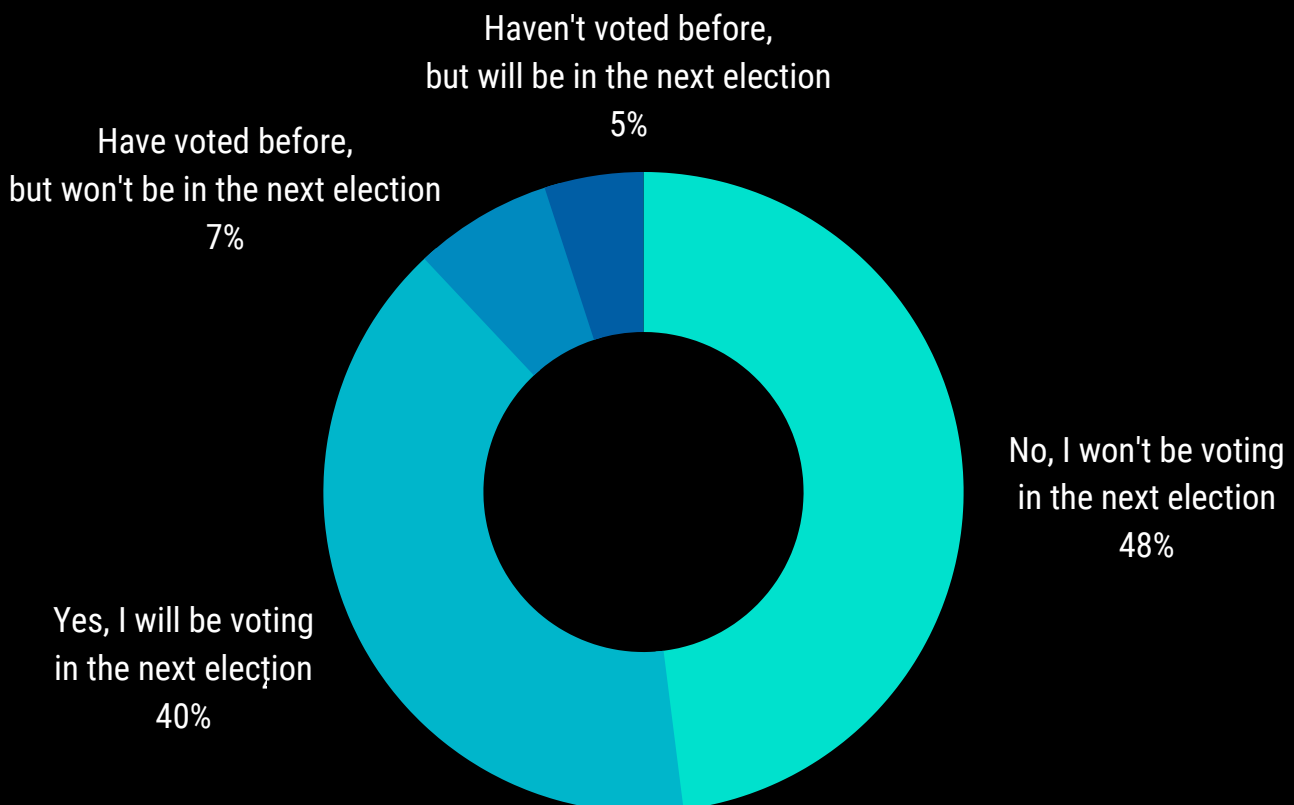
The challenge would be finding a job that makes me excited. I'll be taking the global mindset I developed overseas and shrinking it to the Australian professional services sector, where many do not value the overseas experience of employees.

- An expat on anticipated challenges when returning to Australia.

As a result of Australia's border measures, most expats overseas and planning to return have indicated that they had to delay or cancel visiting Australia (37%).

And at least 45% of this group of respondents intend to participate in the upcoming Australian Federal Elections, despite the complexities of voting when overseas.¹

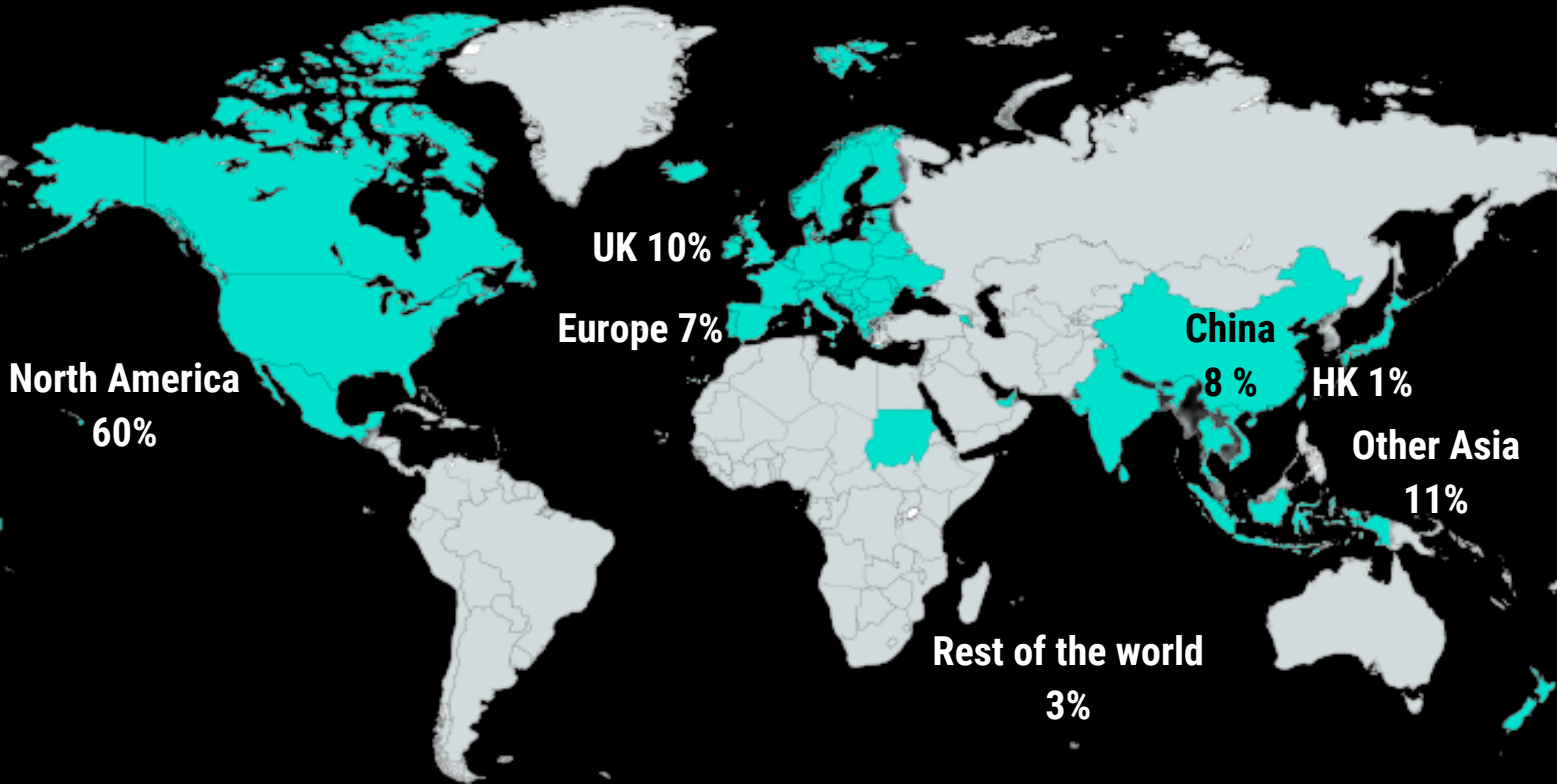
Below is shown how this group engages with Australian Federal elections when overseas.



Australians permanently overseas

Expats intending to stay overseas are mainly located in the United States of America (57%), United Kingdom (10%), China (8%), and Japan (3%).

Their location by region is shown in the map below.



The majority of this group indicated 'better career/business opportunities' (33%) and 'being happily settled' (27%) as their top reasons to stay overseas.

Other reasons for not returning (4%) include: remoteness, housing prices, taxes, and partner's reluctance to move to Australia.

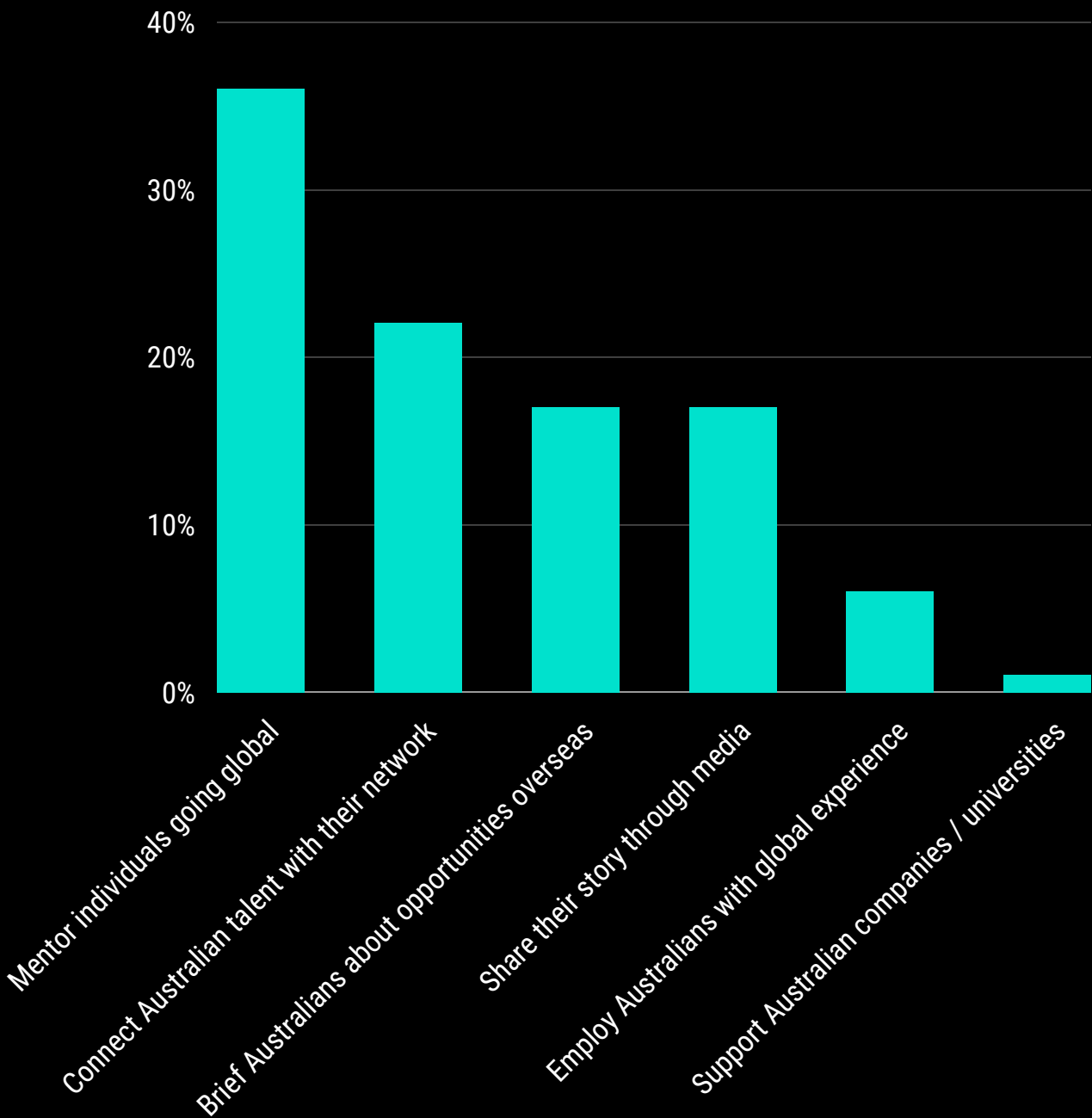


Australians permanently overseas

These expats still want to stay connected to Australia

Responses from this group show that 24% will be participating in the next Australian Federal Election.

Expats would also like to give back to Australia, mostly by mentoring individuals who plan to go overseas (36%). Other ways of contribution are indicated below.



Australians permanently overseas

As a result of Australia's border measures, 48% of expats intending to stay overseas have indicated that they had to delay or cancel visiting Australia, while 4% said they lost employment/business/investment opportunities.

Expats intending to stay overseas have recently been surprised with certain aspects of Australia.

They have mostly indicated negative perceptions, with the strict rules of the country during the pandemic being mentioned by the majority of respondents. Other aspects highlighted by this group are the 'bad management of the pandemic' and the 'indifference to expats'. On the other hand, several respondents perceived an increased recognition and respect of Aboriginal people.

Distribution of responses is shown below, with the most popular appearing more prominently.



“

I admire Australia's Covid Zero approach but I'm concerned about the 'slippery slope' of journalist censorship, data security laws and police powers. In the future these laws could be abused from power.

”



RESULTS: OTHER GROUPS



4% of survey respondents are in Australia planning to live overseas in the future, and another 4% are *friends of Australia* (partner of an Australian, past or current visa-holder in Australia).

A larger sample size in future surveys will assist in validating these results. A limited number of results for respondents in these groups are presented and should be seen as indicative only.

Australians who want to go global

This group is surveyed for the first time in 2021 to gain a better understanding of the pipeline of Australian talent planning to build their career overseas.

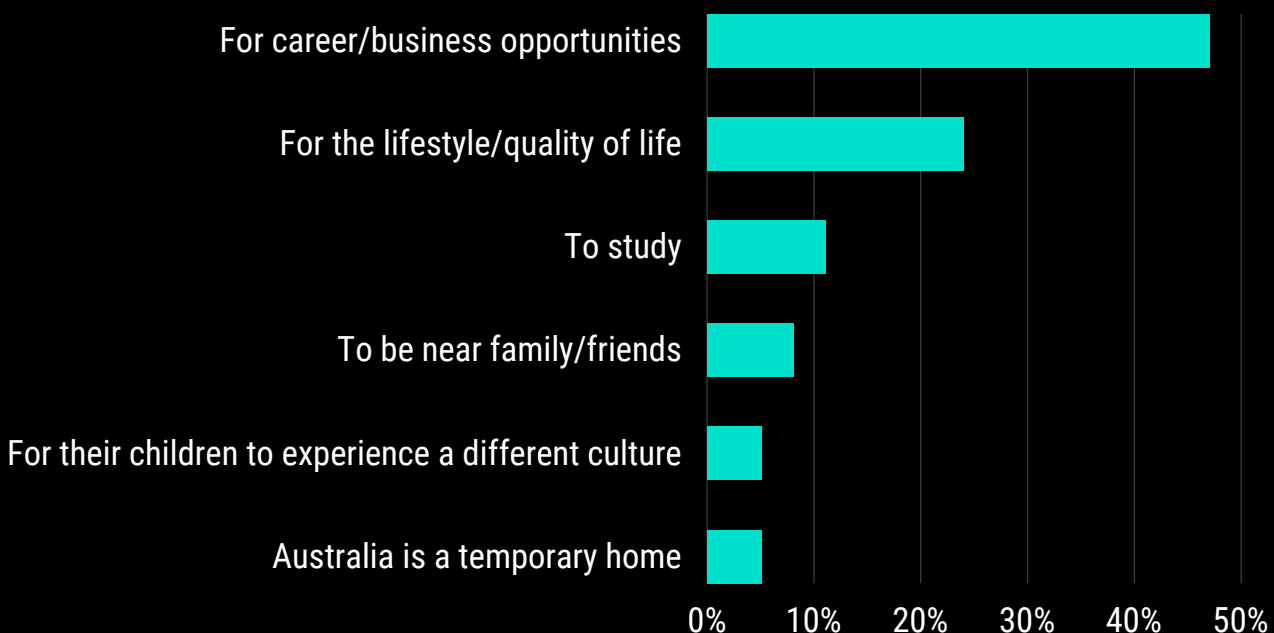
These Australians:

- prefer the USA, the UK, and Singapore as their likely destination overseas
- are mostly Australians in their senior career (43%). Young professionals and students total 30% of this group
- are mainly working in Education & Academia, Creative Industries & The Arts, and the Public Sector

47%

of Australians plan to go overseas for career and business opportunities

They have cited the following as reasons to go overseas:

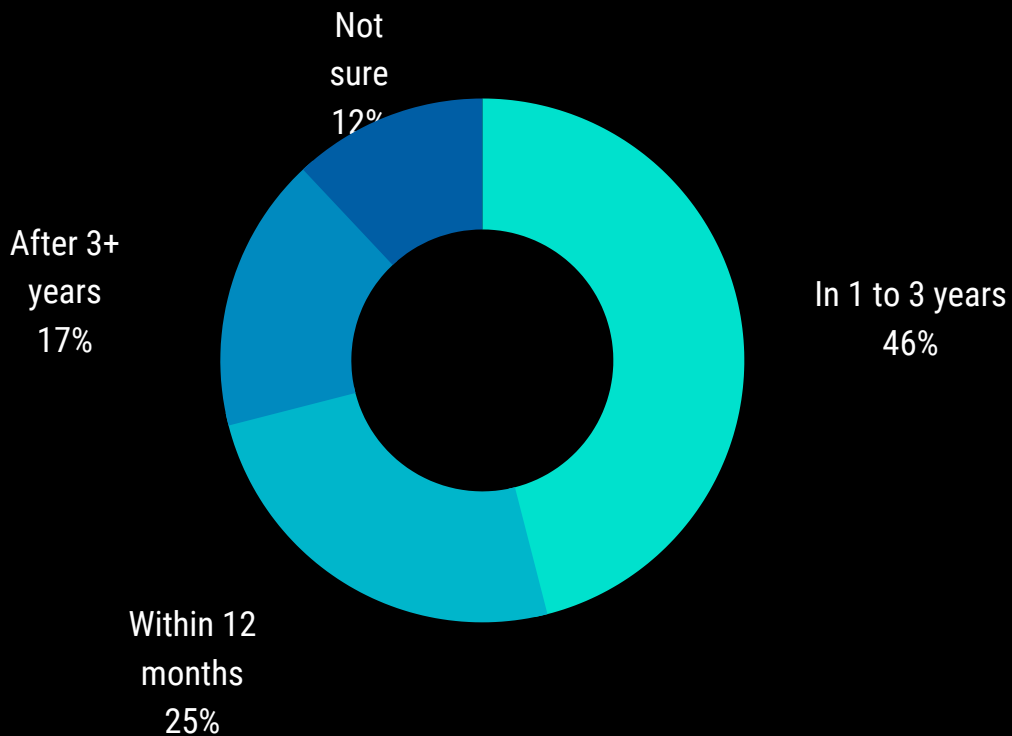


2021 Advance Survey of Global Australians

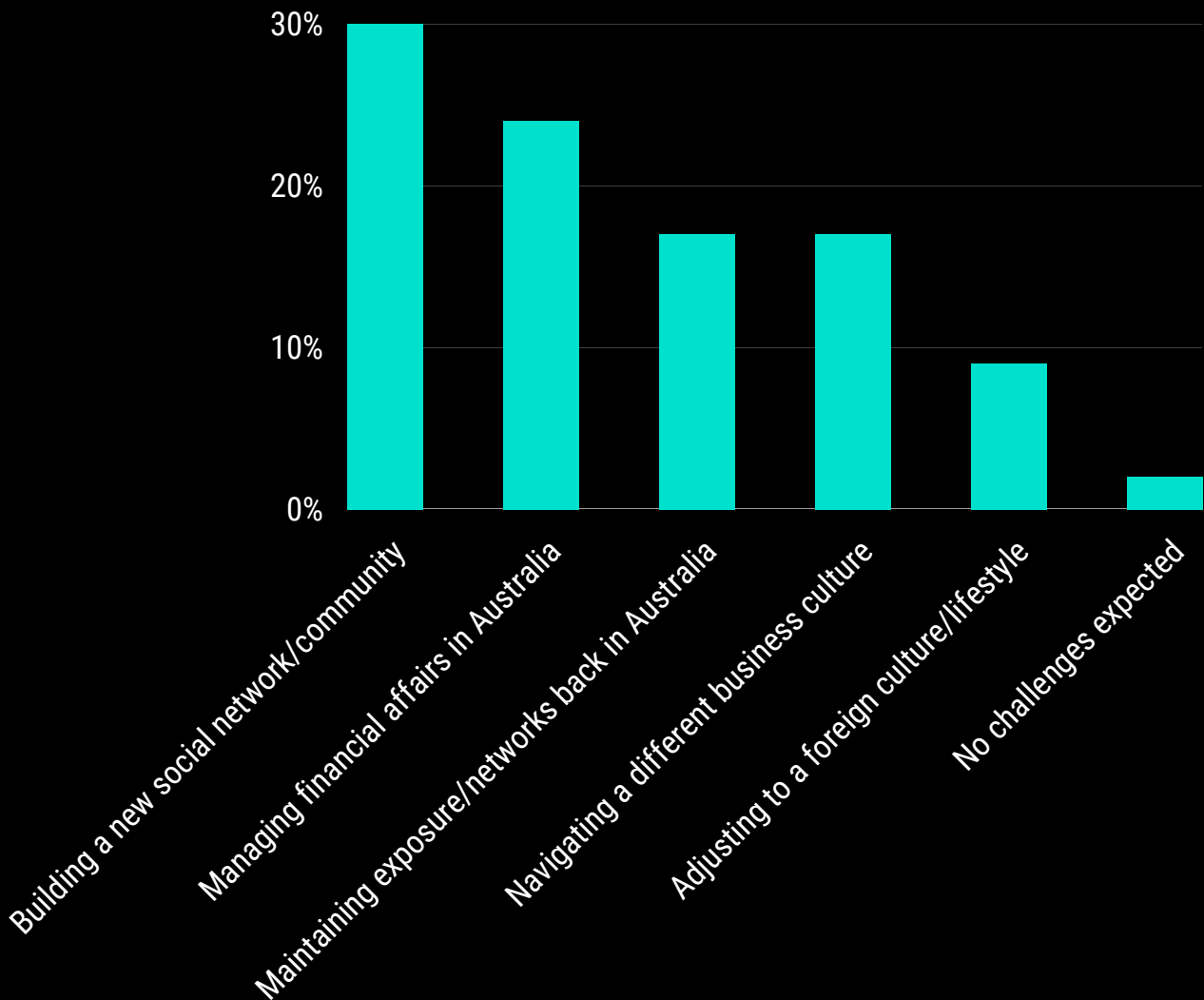


Australians who want to go global

The majority of survey respondents who plan to go overseas, are planning to move in 1 to 3 years (46%). Distribution of responses is as follows:



The majority of respondents in this group expect building a new social network or community to be the most challenging aspect (30%) about moving overseas. Other answers in regards to expected challenges are shown below.



Friends of Australia

This group is surveyed in 2021 for the first time, due to the growing awareness that they can strongly influence skilled migration into Australia, and the decisions of overseas Australians.

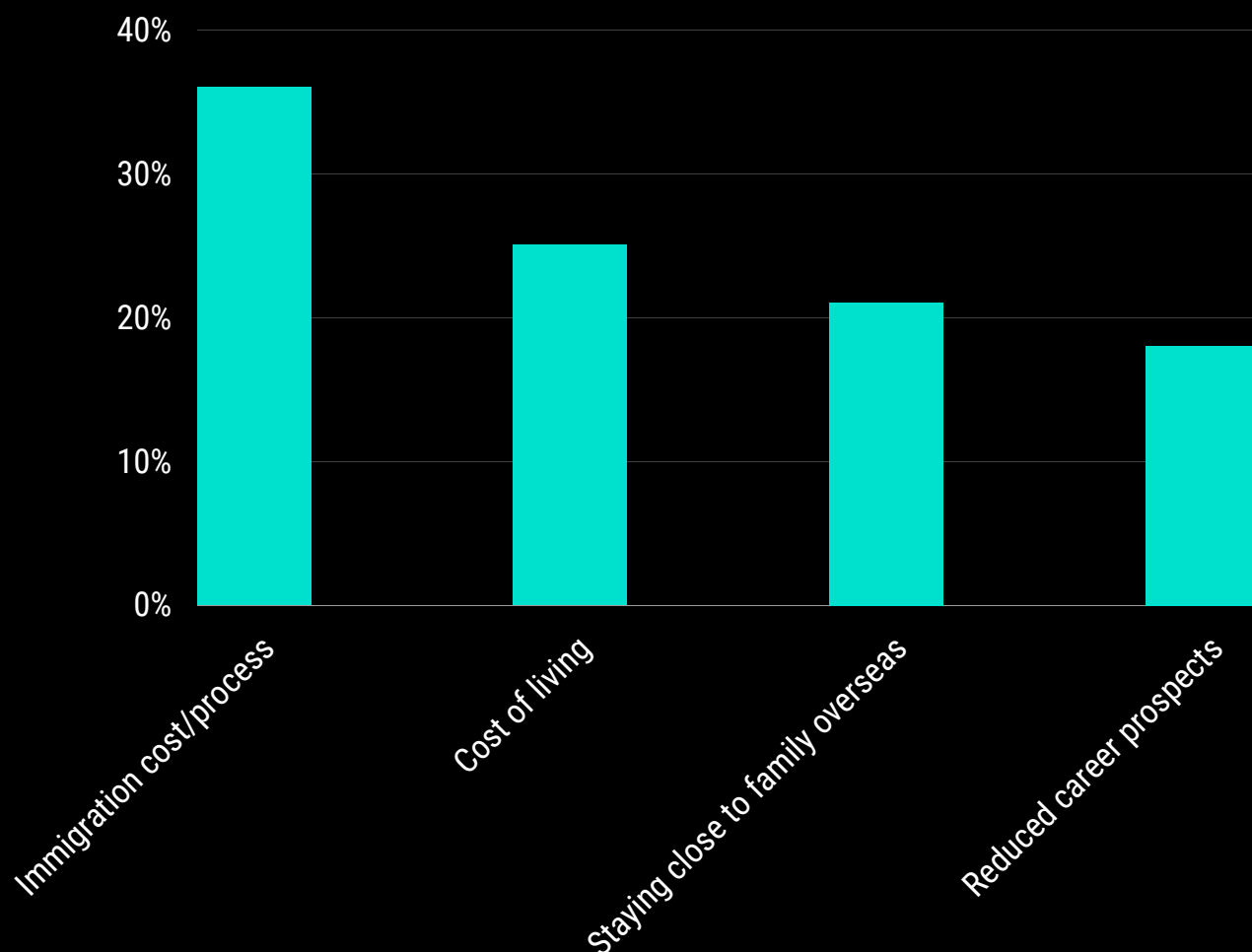
These international citizens are considered friends of Australia because of their past or current ties to the country:

- studied or are studying in Australia (41%)
- are married / partnered / related to an Australian (33%)
- worked or are working in Australia (26%)

39% of respondents are currently in Australia and 61% are living overseas - across Viet Nam, Indonesia, India and USA.

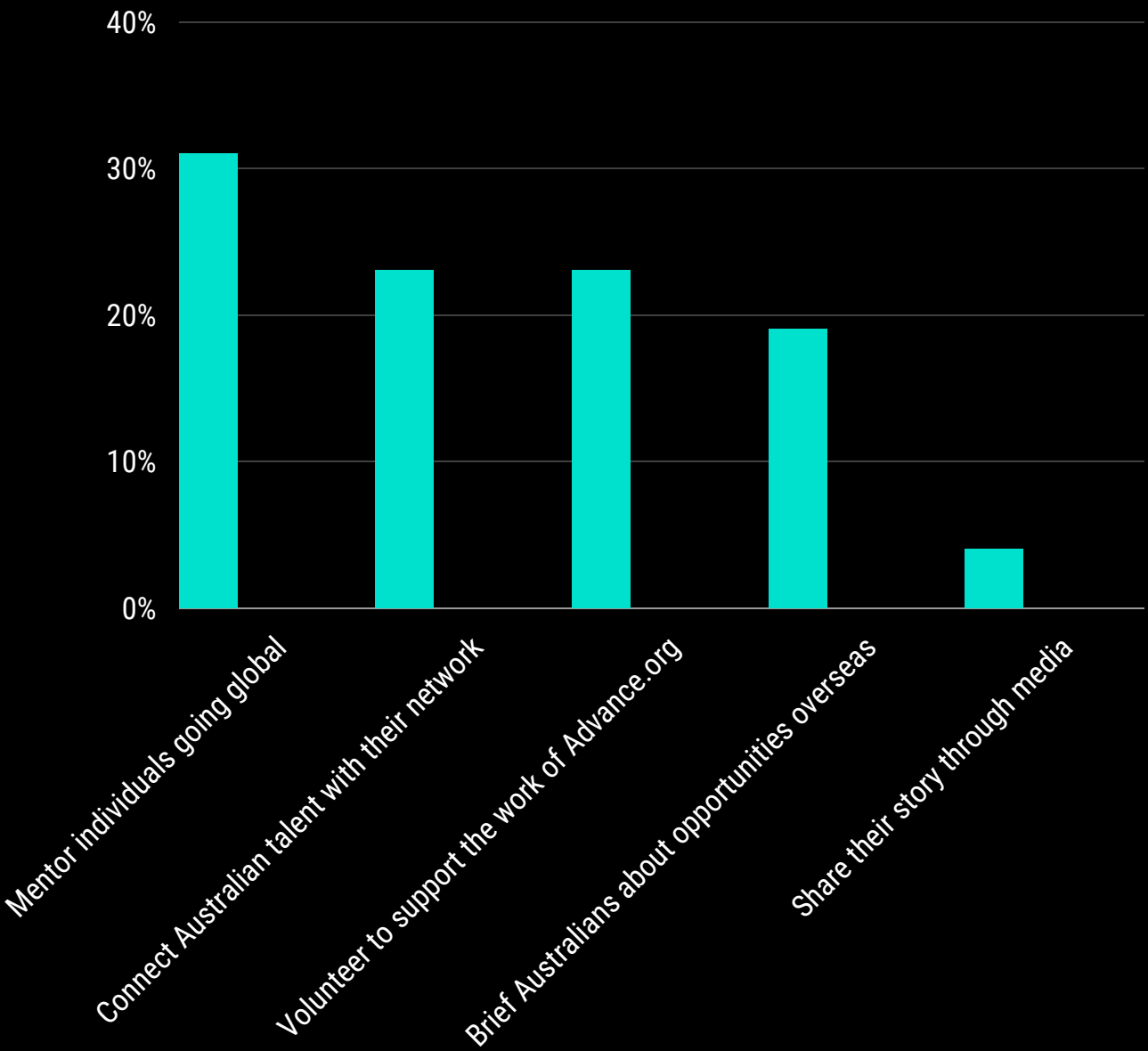
Most of them have spent 1-5 years in total in Australia (44%), and are now in their senior career (33%) working mainly in the areas of Media & Journalism and Information Technology/Telecommunications.

Most of the respondents in this group find the immigration cost and process the main barrier (31%) to live in Australia, and at least 13% indicated they find no barriers to move to Australia permanently. Other barriers cited are shown in the graphic below.



This group of survey respondents would like to continue their relationship with Australia.

Almost a third (31%) have indicated they would like to mentor other individuals going global.



90%

of this group wants to stay connected with Australia and support Australia's global links



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