talent >wars

2026

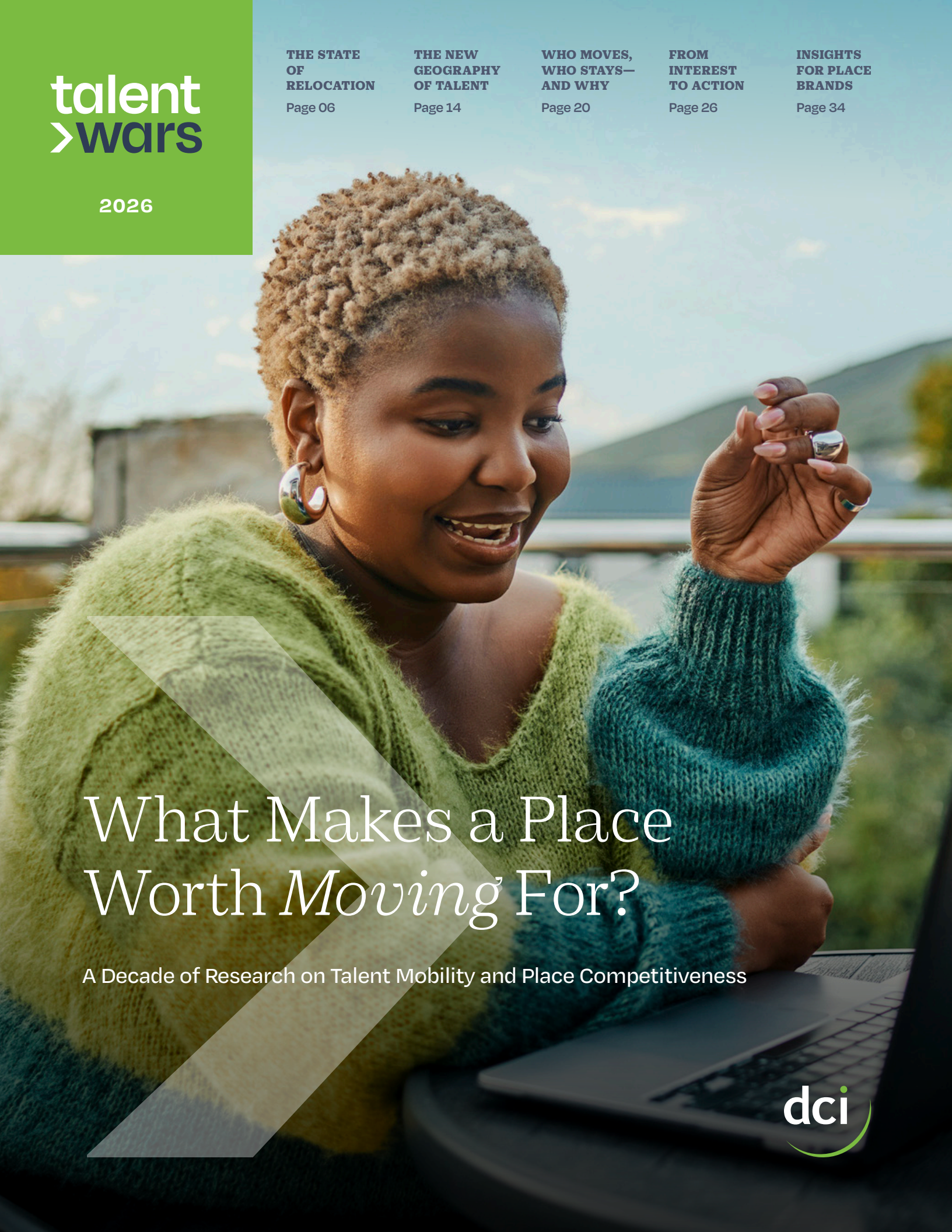
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What Makes a Place Worth *Moving* For?

A Decade of Research on Talent Mobility and Place Competitiveness

dci

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Introduction

Ten years ago, *Talent Wars* set out to explore how communities could attract talent in an increasingly competitive market. Today, the challenge has evolved. Labor force growth is slowing. Mobility is becoming more selective. Workers have more choices and higher expectations. The question is no longer how to attract everyone. It is how to compete for the smaller pool of people who are willing to move — and increasingly, how to retain local talent.



Recent media coverage tends to focus on the idea that mobility is stalling, particularly in the United States.[1] While declining mobility has generated understandable concern, the reality is more nuanced. As our partner Lightcast notes, people are still moving.[2] **The more important questions are: Who is moving? Why are they moving? And what motivates them to choose one place over another?**

Mobility is only one piece of a much larger workforce story. Even if relocation rates returned to historical norms tomorrow, many communities would still face workforce challenges. Across North America and much of the developed world, aging populations, declining birth rates and slower workforce growth are creating structural labor shortages that will persist for decades. Lightcast's *Fault Lines* research argues that three converging forces are reshaping labor markets around the world: demographic change, artificial intelligence (AI) and geopolitics.[3] Together, these forces are changing where workers are available, what skills employers need and how communities compete for talent.

Can AI solve the labor shortage? Not entirely. AI will undoubtedly reshape jobs and accelerate productivity in some industries. Yet many of the sectors expected to face the most severe workforce shortages, including healthcare, hospitality, construction and manufacturing, are among those with the lowest levels of AI adoption. In other words, technology may ease some pressures, but it is unlikely to eliminate the need for workers in occupations that communities are struggling most to fill. At the same time, labor shortages persist in many sectors, but not universally. The challenge has shifted from whether enough workers exist to whether workers with the *right skills* are willing and able to move to the places where they are needed most.

As the pool of mobile talent becomes smaller, those who do relocate are approaching the decision differently than they did a decade ago.

Employment opportunities remain important, but workers are placing greater emphasis on affordability, quality of life, housing, family considerations, flexibility, belonging and certainty about the future.

This year's *Talent Wars* findings suggest that mobility has not disappeared. Rather, relocation is becoming more deliberate, more selective and more personal. The people who are willing to move are evaluating far more than a job opportunity. They are assessing whether a community offers a lifestyle, environment and future worth uprooting for. Economic development organizations (EDOs), destination marketing organizations (DMOs), place brands and talent attraction campaigns need to understand how these factors fit together to win the right talent as competition intensifies.

DCI surveyed both American and Canadian residents between the ages of 21 and 65, roughly 30% of whom have moved at least 100 miles/kilometers from their previous home in the past three years. Now in its 10th edition, this year's *Talent Wars* provides insights on the key factors driving relocation and career decisions for talent across a wide variety of industries.



> Today's talent isn't evaluating a job. They're evaluating whether a place offers a future worth uprooting for.

1 The State of Relocation

As mobility becomes more deliberate, understanding the decision journey becomes even more important. In previous editions of *Talent Wars*, we formulated the "path to purchase" through three basic stages: trigger, exploration/evaluation and final decision. Our results this year point to the same fundamentals, but with one additional layer.

We now include the critical step of *feasibility*, i.e., the consideration of factors that determine whether a move feels possible in the first place. In this pathway, *inspiration* may be sparked by quality of life, a job or family. *Feasibility* compels talent to consider moving costs, housing or economic risk. Once a move is deemed feasible, talent evaluates factors like affordability, safety, healthcare and job quality to determine which places rank higher in a comparison. Finally, a person *commits* to a new location — often with an attractive salary, job certainty or household fit giving them the confidence to act.

In simple terms, different factors matter to individuals at different stages of their journey. The challenge for communities is to develop a strategy capable of earning consideration at each stage, as part of a cohesive whole.

The path to purchase for relocating talent

Since 2017, DCI's *Talent Wars* has examined the path to purchase for relocation and how places can influence this process



Talent isn't just asking
Do I want to move?

Talent is asking
Can I afford to move?

- The majority of talent are concerned about relocation costs.
- The majority of talent say the economy makes them less willing to take relocation risks.
- Cost of moving and housing affordability are the two largest relocation barriers.
- Cost of living, housing cost and housing availability are the top three place-selection factors.

Mobility Becomes More Selective

Compared to previous years, fewer people are actively looking to make a move. Yet mobility has not disappeared. In fact, nearly two-thirds of respondents are either open to relocating or likely to relocate within the next three years. The largest segment falls into the "might relocate" category, creating what we might call the **persuadable middle:** people who are not actively planning a move but remain open to the right opportunity.

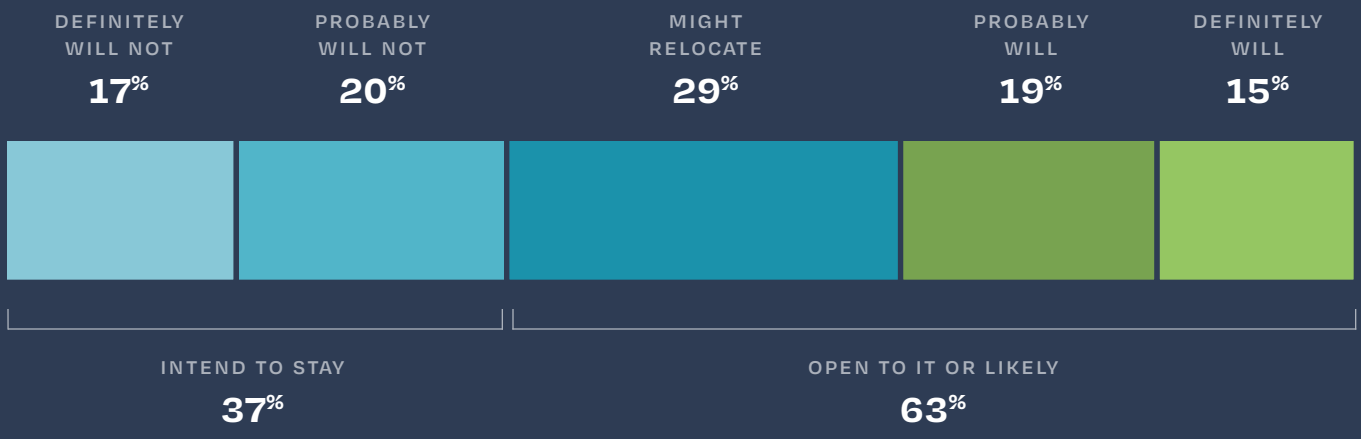
We interpret this to mean that relocation is evolving from a default career move into a higher-stakes life decision. Workers are weighing affordability, quality of life, family considerations and future opportunities more carefully than ever before. For communities, the implication is clear: talent attraction remains worthwhile, but success increasingly depends on identifying and engaging the audiences most open to making a move.

> "Nearly two-thirds of respondents are either open to relocating or likely to relocate within the next three years.

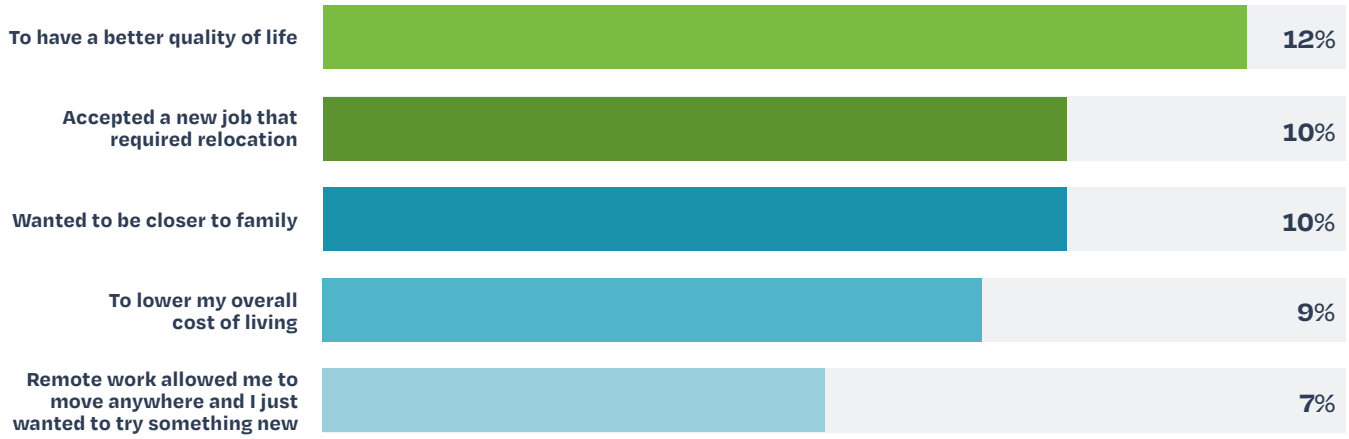




How likely are you to relocate within the next three years?



What was the primary trigger that caused you to relocate during your most recent move?



What Inspires a Move

That brings us to the inspiration that triggers a relocation journey. The most compelling reasons why people move remain largely consistent year over year, with a few noteworthy variations. The desire for a better quality of life remains the #1 motivator, consistent with last year's survey. Accepted a new job requiring relocation rises to a tie for #2 (up two spots from last year), essentially tying with the desire to be closer to family. The clear signal is that many people are looking to improve their quality of life or make moves that align with their career ambitions.

Cost of living dips to the #4 spot in this year's survey, remaining part of the top segment of motivating factors. This does not mean cost of living is less important than quality of life. Rather, our data show that affordability becomes a dominant factor *later* in the decision process. At the same time, the prevalence of family as an initial trigger indicates that social barriers (or motivators) can rate as highly as financial concerns in shaping talent mobility or retention.

When inspiration is broken down between the United States and Canada, several key differences emerge. For Americans, quality of life proves to be the most compelling trigger. For Canadians, it is a new job opportunity. Notably, Americans are more likely to view remote work (#3) as an opportunity to relocate compared to their Canadian counterparts.





Top Relocation Triggers | U.S. vs. Canada

UNITED STATES

1

14%
To have a better quality of life

2

11%
Wanted to be closer to family

3

8%
Remote work allowed me to move anywhere and I wanted to try something new

CANADA

1

14%
Accepted a new job that required relocation

2

11%
To lower my overall cost of living

3

11%
To have a better quality of life

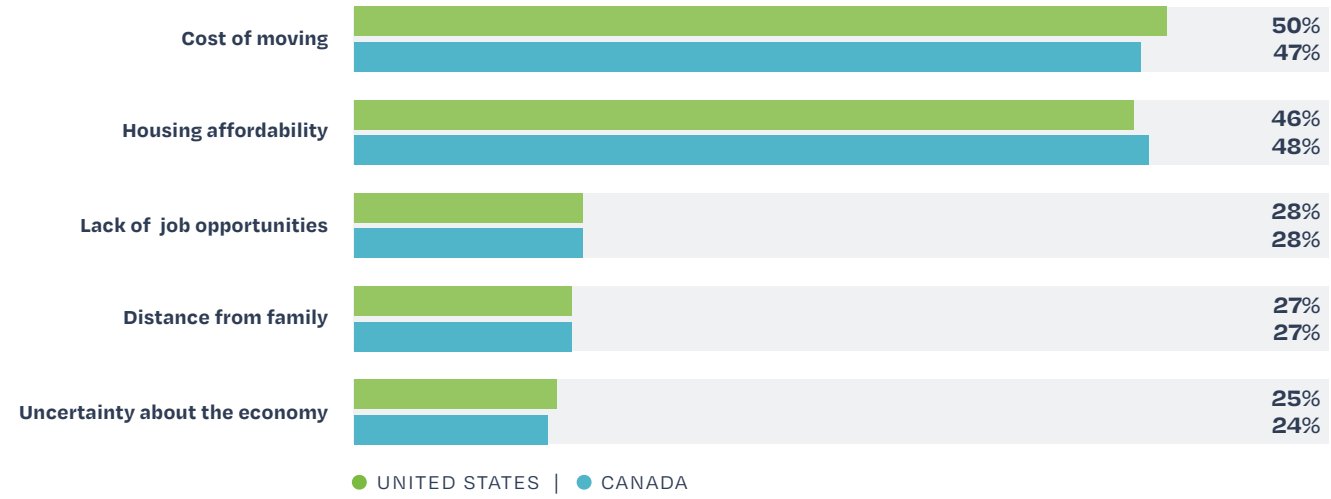
Affordability Is a Gatekeeper

When the relocation journey progresses from inspiration to feasibility — the point at which potential movers start asking, *"Is this even possible?"* — things change significantly. It is at this stage that a host of barriers rise as top-of-mind concerns: moving costs, the price of housing and economic uncertainty. A location's affordability proposition begins to play an outsized role, moving from an advantage to a necessity that can make or break whether someone relocates at all.

As a case in point, our findings show 62% of Americans and 67% of Canadians are concerned about the cost of relocating. Cost of moving and housing affordability rank as the top barriers that would make relocation difficult, leading the next-highest barrier by roughly 20 percentage points in both countries.

The upshot of all this is that communities need to promise more than a better lifestyle. They need to give talent the confidence that a move is financially feasible.

What, if anything, would make relocating difficult for you today?



Economic Confidence and Relocation

Talent's perception of the broader economy plays a role in the feasibility stage as well. Fifty-four percent of Americans and 59% of Canadians say the state of the economy makes them less willing to take relocation risks. In turn, 31% of those who cite economic uncertainty as a relocation barrier say they are likely to relocate in the next three years (vs. 35% of those who do not cite the same barrier).

What It Takes to Win

Once a relocation is judged feasible, talent begins to evaluate a wider spectrum of factors — weighing communities against each other according to their own personal priorities. When asked to rate certain factors by importance when considering an area as a place to live, respondents identify cost of living (#1), housing cost (#2) and housing availability (#3) at the very top of the evaluation hierarchy. Safety (#4) and healthcare (#5) follow close behind. These results are strikingly consistent with the past ten years of *Talent Wars*.

Commitment is the final stage of the journey. For Americans, lowering the cost of living or improving quality of life are about equal (both 21%) as true dealmakers that would convince them to relocate. For Canadians, quality of life rates higher (26%) than cost of living (21%) as a deciding factor.

Significantly, salary increases (15% for both U.S. and Canada) and career advancement opportunities (13% for both countries) follow as the next most convincing factors that would seal the deal. Among those who point to a salary increase, the largest group (33% of Americans, 34% of Canadians) say a 20 to 29% raise in pay would make relocation worthwhile. As we like to put it, quality of life inspires while the job opportunity often seals the deal.

As we have seen, the question of cost emerges as a common theme throughout the decision journey, and especially after initial inspiration. It can take on different roles in the minds of talent — acting as a detractor and a motivator behind relocation.



How Different Priorities Shape Different Stages

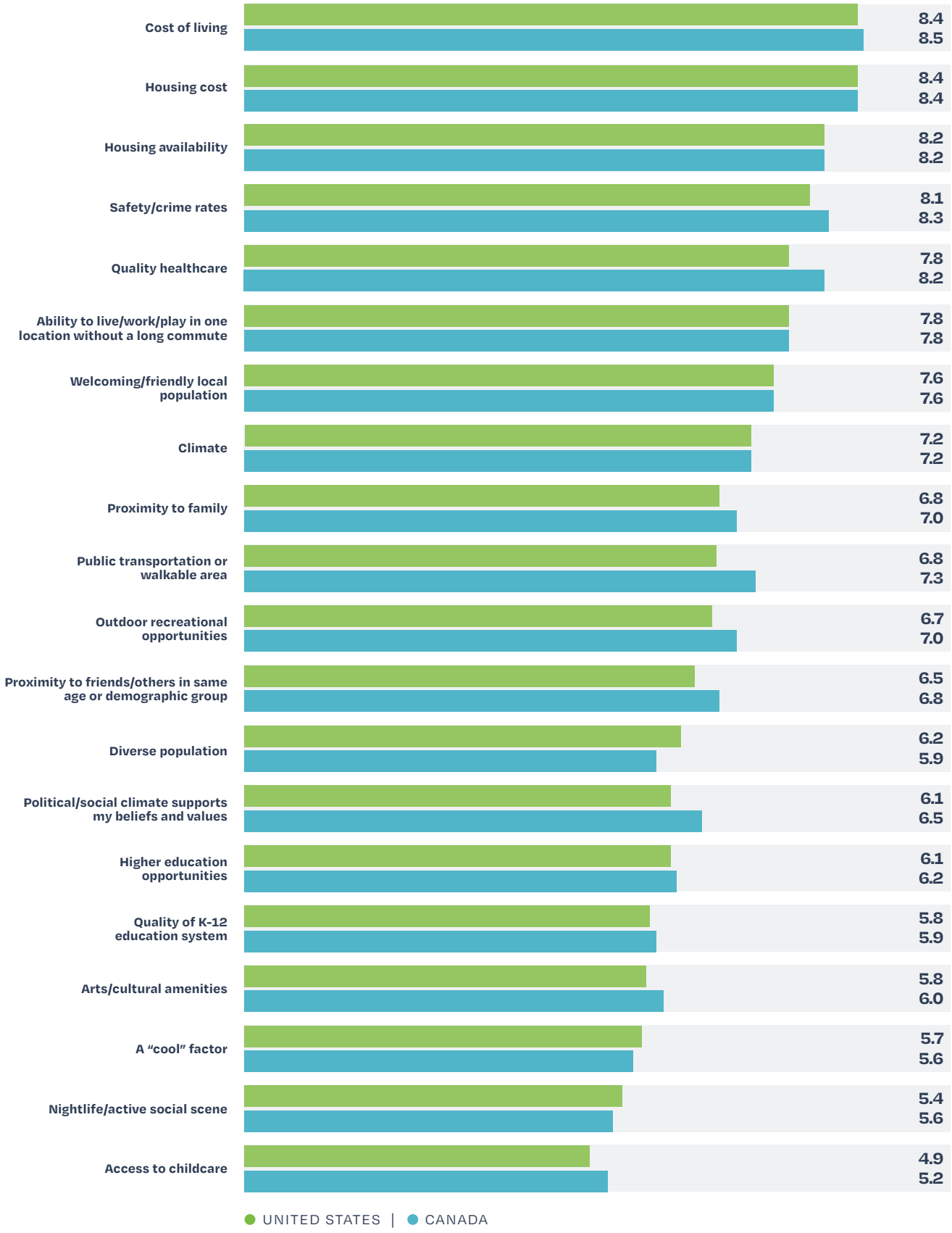


I'm inspired to move	›	Quality of life, Family, New jobs
Is a move feasible?	›	Housing costs, Moving costs, Economic risk
Which place wins?	›	Affordability, Safety, Healthcare
The final push	›	Salary, Advancement, Household fit

Top Lifestyle Factors for Relocation

How important were each of the following factors in your decision to relocate?

1 (not important) to 10 (very important)



2 The New Geography of Talent

For EDOs, DMOs, companies and other organizations, the talent landscape has evolved. The highest priority is to find workers with the right skills who are willing and able to move to the places where they are needed.

Our research shows that workers across a wide range of sectors are willing to relocate, from life sciences and healthcare to tech and finance to construction. Even in a time of slowed mobility and tighter labor market conditions, the opportunity to attract workers in high-priority industries remains wide open.



Workers Still Follow Opportunity

Our findings indicate that jobs still matter to talent. For example, people who are actively looking for work while unemployed are most likely to relocate in the next three years (36%) compared to other employment categories. About half of respondents (48% of Americans and 51% of Canadians) say a job that matches their skill and salary requirements is more important than an area's quality of life. This aligns with our findings from previous years.

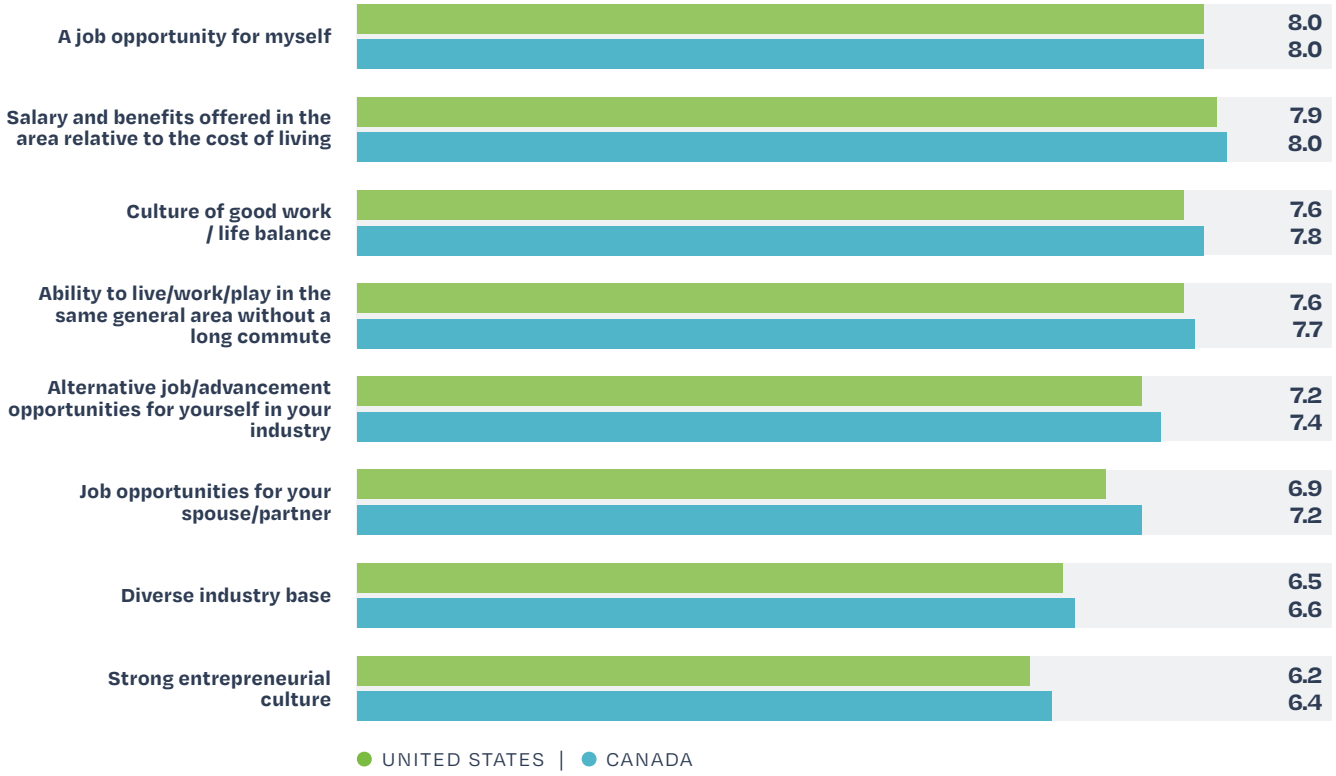
The distinction is that a job offer alone is increasingly insufficient. Today's talent is looking for a strong salary and benefits relative to the cost of living. That means work-life balance, shorter commutes, dependable career advancement and overall economic opportunity. Respondents rate each of these factors with near-equal importance when considering an area as a place to live and work, consistent with previous years. The same pattern holds true when talent evaluates a job opportunity itself — with salary, work-life balance, health insurance and paid time off ranking at the top.

Taken together, we see jobs effectively functioning as an entry requirement. Talent expects competitive compensation, advancement and benefits from employers. Communities then compete on whether they can support the broader life workers want outside of work.

Top Career Factors for Relocation

How important are the following career/work-related factors when considering an area as a place to live and work?

1 (not important) to 10 (very important)



Top Mobility Signals

SIGNAL 1



PAST RELOCATOR

60% Likely to move again

SIGNAL 2



ACTIVE JOB-SEEKER
(while unemployed)

36% Highest relocation likelihood among employment groups

Personal Confidence Remains Strong Despite Economic Concerns

While workers have become less optimistic about the overall job market, they remain surprisingly confident in their own careers. In 2025, nearly half of respondents in both countries believed the job market was improving. In 2026, that figure drops to just 27%, with negative assessments now substantially outweighing positive ones.

Yet this broader uncertainty has not translated into a crisis of personal confidence. Nearly two-thirds of respondents in both countries remain confident in their individual career prospects. The result is an interesting tension: talent generally believes in its own employability while remaining wary of the wider economy. As a result, relocation decisions may feel more selective as workers weigh the risks associated with housing, affordability and career stability more carefully than in previous years.

27%

say the job market is better than a year ago

65%

feel confident in their own career prospects

Workers remain confident in their own employability, even as they grow less confident in the broader economy



Remote Work Finds Its Equilibrium

In 2026, remote work is no longer reshaping migration patterns in the same dramatic way as the years immediately following the pandemic. Once a source of disruption, it has become integrated into modern work culture. Our report offers a clearer picture of how work-preference groups are stabilizing into a new equilibrium.

Among full-time remote workers, 50% of Canadians and 51% of Americans prefer to remain fully remote. Hybrid workers generally prefer hybrid (45% of Canadians and 36% of Americans). Meanwhile, formerly remote employees who have returned to the office are more likely to describe themselves as flexible than to say they prefer full-time remote work. Consequently, communities should avoid treating remote workers as a single, uniform relocation audience and instead identify messaging opportunities across distinct preference groups.



Remote Work Has Settled Into a New Normal

Unlike the immediate post-pandemic years, remote work is no longer dramatically reshaping relocation behavior. Work preferences appear to be stabilizing into a new equilibrium.

Remote workers remain remote-first
50-51% prefer to stay fully remote.

Hybrid workers prefer balance
36-45% prefer hybrid arrangements.

Office-returners favor flexibility
33-35% say they are flexible if the opportunity is right.

Workforce Re-Entry and Training

In last year's report, we devoted significant attention to workers outside the labor force, finding that 63% were interested in re-entering and 88% were willing to undergo training to change career paths. Our 2026 data provide fresh insights. Among a small group of respondents currently not participating in the workforce, 76% say they are interested in re-entering the workforce. When asked what might entice them to re-enter, 57% identify earning a salary, 43% a job using their skills or education, 36% contributing meaningfully to the community, 34% benefits and 17% paid training or professional development.

These results show that one way of filling labor gaps is by proactively re-engaging people within a community who may return to the workforce. They also reinforce the importance of building skills among existing residents, in tandem with a strategy to attract new talent.

76% **of those not currently participating say they are interested in re-entering the workforce**





AI: Curiosity Without Consensus

Even as AI technology rapidly accelerates, its impact on the job market remains difficult to discern. This explains why workers have not yet reached a clear consensus about its effects. Canadians are modestly more optimistic about AI than Americans, with 46% of Canadians embracing the technology compared to 37% of their U.S. counterparts. Many workers are already using AI for job exploration (34% in the U.S. and 40% in Canada). In general, workers remain divided on whether AI is benefiting the workforce and uncertain about how it will affect their future career prospects.

In short, AI may be changing how people search for jobs and potential relocation destinations, but it does not appear to be changing the core factors that influence where people choose to live and work: affordability, housing, jobs and quality of life.

3



Who Moves, Who Stays — and Why

Earlier, we discussed how quality of life acts as the #1 initial trigger for the relocation journey, with the desire to be closer to family not far behind. This brings us to the emotional and social dimensions of talent attraction and retention. Which kinds of people are more likely to move, and why do they do it? And on the other hand, what compels people to stay rooted in a community?

For many people, the most difficult part of moving to a new place may not be finding a job but leaving a life behind. In this section, we will explore how factors like belonging, family, emotional well-being and social infrastructure influence the relocation equation.

Some People Are More Mobile Than Others

Our research shows that one of the strongest predictors of whether someone will move is whether they moved in the past. In fact, 60% of past relocators say they are likely to relocate again in the next three years vs. 24% of people who did not relocate in the past. That means past relocators are 2.5 times more likely to move than their counterparts.

We call these people serial movers. This category helps to answer one of the core questions at the heart of this report: if the mobile talent pool is shrinking, who should communities prioritize in their attraction efforts? The answer may not lie solely in broad demographic categories such as younger workers, remote workers or people in particular sectors. The answer may instead be behavioral: people who have already demonstrated a willingness and ability to navigate the various challenges associated with relocation.

In that sense, serial movers represent a more concentrated pool of talent, but one with much higher potential. The takeaway for place brands is to adopt a behavioral targeting approach, treating prior relocation as a signal for future mobility. That may entail testing audience segments such as renters, former residents, recent college graduates or people who have relocated across regions. The persuadable middle group of talent — those who are not committed to moving, but open to it — may be more concentrated in these segments of the population. In a lower-mobility era, communities may find greater success identifying people who already demonstrate mobility, rather than attempting to convince deeply rooted residents to relocate.



The Best Predictor of a Future Move Is a Previous Move

SERIAL MOVERS

60%

Likely to relocate again

NON-MOVERS

24%

Likely to relocate

Past relocators are

2.5x

more likely to relocate again than people who have not moved recently.

Relocation Is a Household Decision

It is common for place brands to default to treating relocation as an individual transaction. The reality is that relocation decisions are frequently made by households. On this question, however, there are important nuances to consider.

Respondents with children and no partner, and those with neither a partner nor children are most likely to say they will relocate in the next three years (37% each). By contrast, the people who say they will not relocate are respondents living with a partner and children (37%), and those living with a partner but no children (41%). In other words, the presence of a partner appears associated with lower relocation intent. The presence of children alone does not appear to impact mobility as strongly.

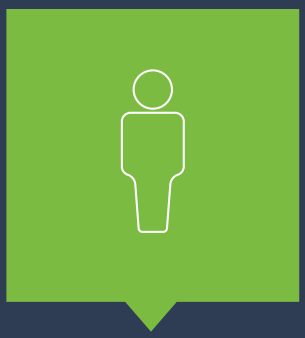
The high influence of partner presence points to several aspects of the moving process. First and foremost, relocation becomes a joint decision.

Furthermore, a move needs to account for the career prospects of both partners. A new city may come with housing and commute tradeoffs. Moving will also impact the accompanying partner's social networks and sense of belonging. It may mean moving further away from the partner's family.

And looking more broadly at the entire household including children, relocation comes with the challenge of finding new healthcare and childcare providers. The lesson for place brands is to focus on addressing the needs of talent who have a partner and/or children. If retention is the goal, creating pathways for families to thrive gives talent a reason to stay in place. Meanwhile, marketing to attract new talent can mean providing resources that help an entire household imagine their new daily life together.

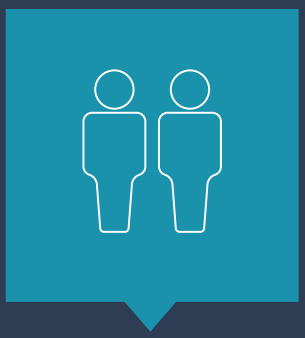
Partners Reduce Mobility More Than Children

ONE ADULT DECISION-MAKER



more likely to move

TWO ADULT DECISION-MAKERS



less likely to move



> If retention is the goal, creating pathways for families to thrive gives talent a reason to stay in place.

The Importance of Social Infrastructure

There is the pragmatic financial equation that sways a move. Then there are the deeper social and emotional questions that come with it. Social infrastructure encompasses the human foundations that make life feel worthwhile, supported and meaningful. Within this framework, family can act as a powerful force in relocation decisions, as we have seen. The desire for peers, community and a sense of belonging is strong. Familiarity with navigating urban, suburban or rural environments plays a role. And finally, safety remains a top priority for talent on the move.

Most respondents in both countries are unwilling to compromise on safety, with 69% of Americans and 75% of Canadians saying that an area's crime rate and other safety indicators strongly influence where they choose to live. These findings are consistent with previous years. For place brands, the best approach is to make their community safety information transparent, accessible and easy for prospective residents to evaluate.

Belonging is another key pillar of social infrastructure. When asked whether it is important to live somewhere with a significant population of people in their peer group — with similar ages, skill sets and values — 45% of Americans and 50% of Canadians said yes. People are looking for signs that they can find others in their cohort and build meaningful connections in a new place.

Familiar Locales and Lifestyles

Another relocation factor is a person's familiarity with the type of environment that a new place offers. Among people who recently moved, 72% of those who originally came from a large metro (1+ million people) moved to another large metro. Fifty-nine percent of suburbanites moved to another suburb. And 59% moved from rural to rural.

Small metros of less than 1 million people are the only outlier, with 43% transferring from small metro to small metro while a near-equivalent 42% upscaled from a small metro to a larger metro. These results are largely on-trend with previous years. People are more likely to stay in a similar type of locale during a relocation, allowing them to change their location without significantly altering their preferred lifestyle.

What Quality of Life Actually Means

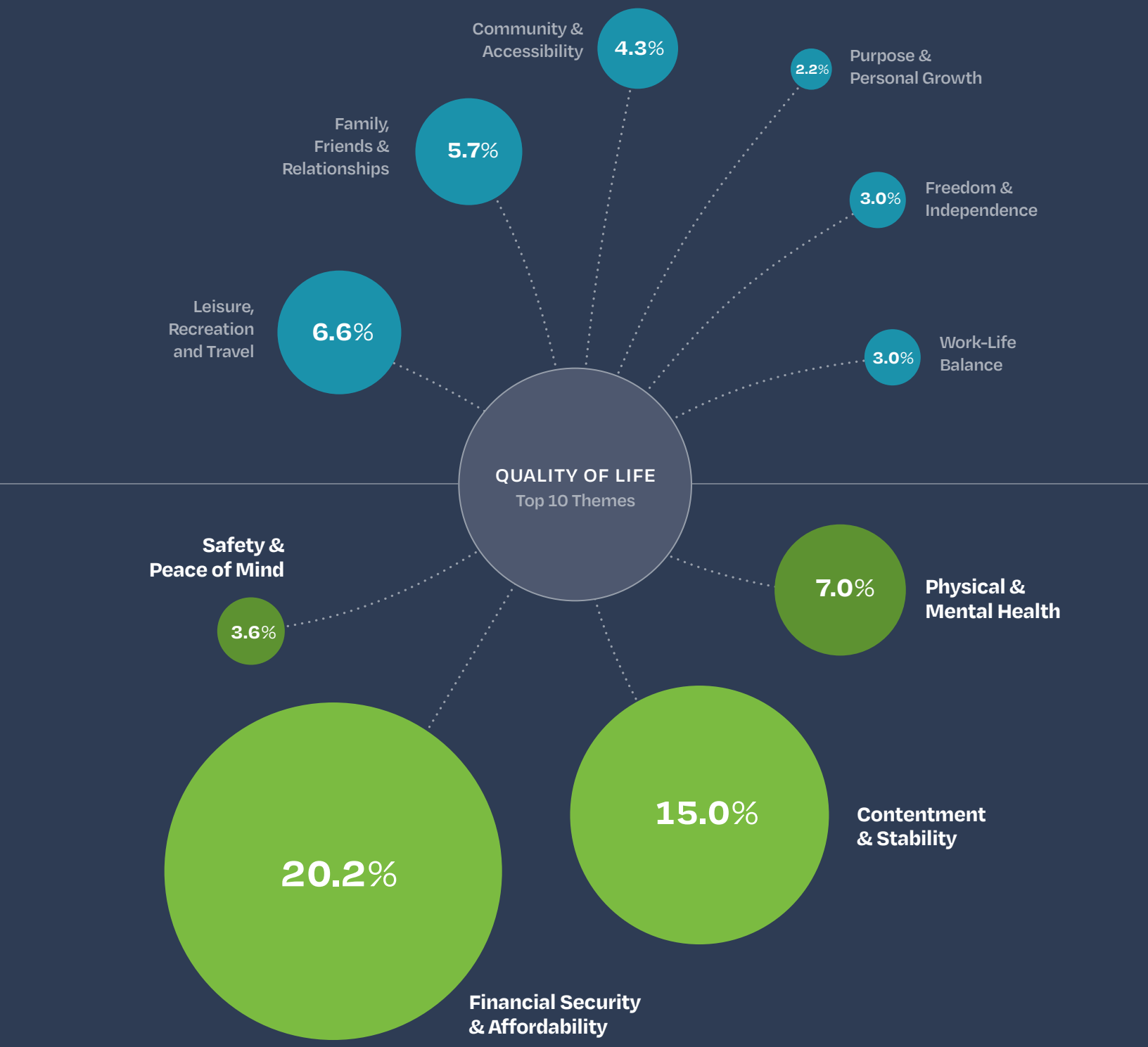
Quality of life is often discussed as a collection of lifestyle amenities, but talent's definition is far more nuanced. When asked to describe quality of life in their own words, respondents pointed first to financial security, stability, health and safety, followed by relationships, community, recreation, freedom and personal fulfillment. The result is a useful reminder for place brands: quality of life is not simply about what a community offers to do. It is about whether people can build a stable, healthy and meaningful life there. This reinforces a recurring theme throughout Talent Wars — that people are evaluating entire lives, much more than jobs or lifestyle amenities alone.



> People don't define quality of life by a single factor. They define it through a balance of financial security, well-being, relationships, community and personal fulfillment.

The Quality of Life Ecosystem

HUMAN WELL-BEING
The canopy — 35% of responses



PRACTICAL WELL-BEING
The roots — 65% of responses

4 From Interest to Action

Talent attraction is often treated as something that begins when a person starts looking for a new job or considering a move. In reality, relocation decisions frequently begin much earlier. Long before relocation becomes an active consideration, people are forming impressions of communities through visitor experiences, social media, online research, media coverage and conversations with family and friends. A destination's brand can influence perceptions months or even years before a relocation opportunity emerges.

This year's findings reinforce an important reality for place brands, EDOs and DMOs: communities are not simply competing when someone enters the market for a new job or place to live. They are competing for awareness, familiarity and consideration long before a move is on the table. By the time relocation becomes a realistic possibility, many perceptions have already been formed.

Over the past decade of *Talent Wars*, we have consistently found that talent is exposed to a wide range of information sources throughout the relocation journey. In 2026, that pattern remains true. The challenge for communities is not simply reaching talent when they begin researching a move, but establishing a positive impression early enough to become part of the consideration set.





Today's Visitor Is Tomorrow's Talent

Common sense and experience tell us that people often begin evaluating a place long before relocation becomes an active consideration. Awareness flows into inspiration. Our way of describing this phenomenon is that today's visitor is tomorrow's talent. That visitor can be an on-the-ground traveler who gets a firsthand glimpse of a place they have never been before. Or it can be a virtual visitor to a website or social media page. Both types are important to understand, especially insofar as they can inform a synthesis of tourism and talent marketing strategies.

In 2026, internet searches and word of mouth tie as the #1 sources of information shaping talent's perceptions of a place to live. In this case, word of mouth can occur in real-world conversations just as much online, which may explain its high ranking. Personal travel comes next, followed by social media and digital advertising. While these results have shifted over the years in favor of the internet and other sources, tourism clearly remains a top influence on potential talent.

As the population becomes increasingly digital-native, even the idea of "first-hand experiences" may require an update. Today's talent can find just as much tactile inspiration from a place brand's well-crafted social media presence as they do from a booked flight and hotel stay. In either case, the ultimate objective is to move beyond mere awareness and earn a place on the shortlist.

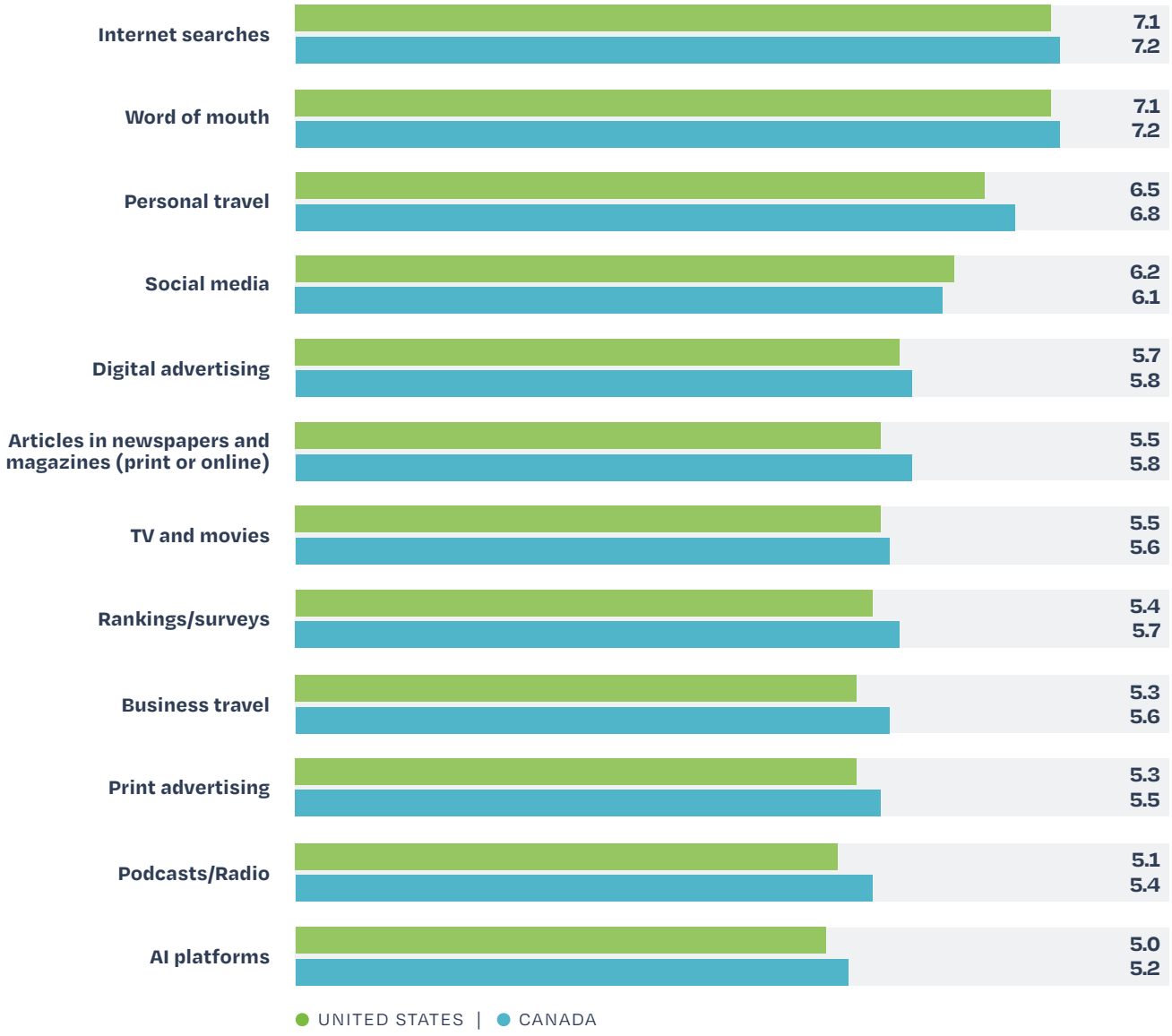
When asked to name three social media channels that most influence their perception of places, respondents listed Facebook as their clear #1 choice — with 68% in the U.S. and 62% in Canada citing it as a top source. This continues the platform's dominance in Talent Wars for several years running. Next in line are Instagram (53% U.S., 52% Canada), YouTube (41% U.S., 46% Canada), TikTok (36% U.S., 31% Canada) and then LinkedIn (18% U.S., 24% Canada).

> "Relocation may happen in months. Perceptions of places are built over years.

What Builds a Place Brand?

How influential are each of the following sources of information on your perceptions of an area as a place to live and the quality of life in an area?

1 (not influential) to 10 (extremely influential)



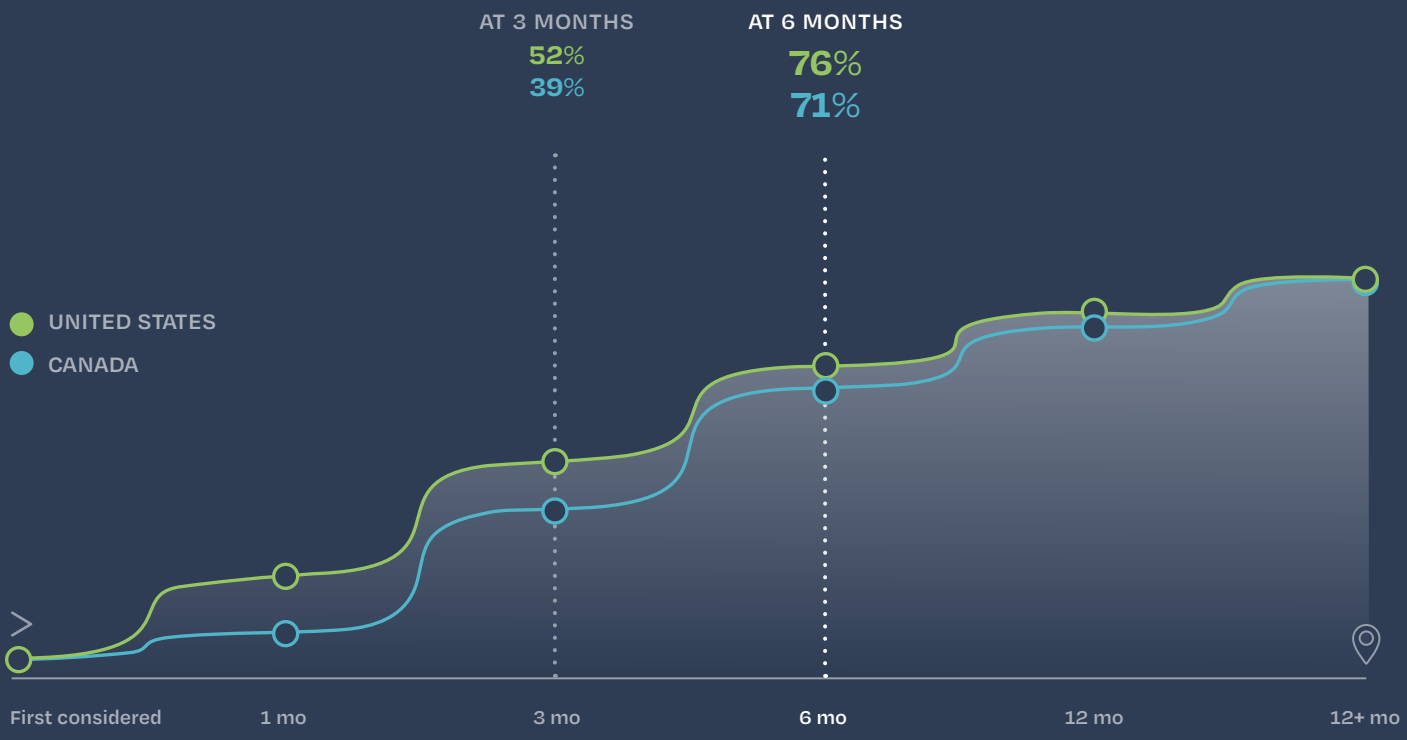


Relocation Decisions Move Quickly

The question of time further cements why places need to build familiarity before someone actively enters the market. Our research shows that the timeline from initial consideration to actual relocation remains highly condensed. In 2026, 76% of U.S. movers and 71% of Canadian movers relocated within six months. These results are consistent with the previous year's findings, with the U.S. share remaining unchanged while the Canadian share has slightly increased. A substantial share move even more quickly, within three months or less (52% of Americans and 39% of Canadians).

Time from First Considering Relocation to Moving

Approximately how many months did it take from the time that you first considered relocation to when you actually relocated to a new location?



Months since first considering relocation — cumulative share who had already relocated.

Looked at one way, this means communities have less time to influence relocation decisions than they often think. By the time someone starts serious research, much of their perception may already be formed. But from another perspective, a place's brand can speak to talent well before a move is on the table. Moreover, it illuminates why communities need to have infrastructure in place to provide practical information quickly to potential newcomers — whose decision window may be very short.



Inputs in the Job Search

Many of the same trends that shape perception of places also factor into the job search process. Online job board sites are the #1 source utilized by talent when looking for new opportunities, used by 48% of Americans and 51% of Canadians. Talent also leverages friends and family (35% in the U.S., 32% in Canada), company websites (33% in the U.S., 37% in Canada), social media (29% in the U.S., 24% in Canada) and professional networks (20% in the U.S., 23% in Canada). These results are consistent with previous years.

Here again, Facebook retains its dominance as talent's most preferred social media channel for finding employment opportunities (cited by 66% of Americans and 61% of Canadians). Respondents say that posts from friends and family, as well as content from company and organization pages, are the most helpful when learning about employment opportunities.

> "3 in 4 U.S. movers relocate within six months of first considering it. In Canada, it's 7 in 10. The decision window is shorter than most places think.

Destination Content Guides the Decision Journey

A destination's brand often begins shaping perceptions long before relocation becomes an active consideration. Throughout this report, we have seen how visitor experiences, social media, online research and word of mouth help people form impressions of communities months or even years before a move is on the table. Destination marketing materials become particularly important once that initial awareness turns into active consideration.

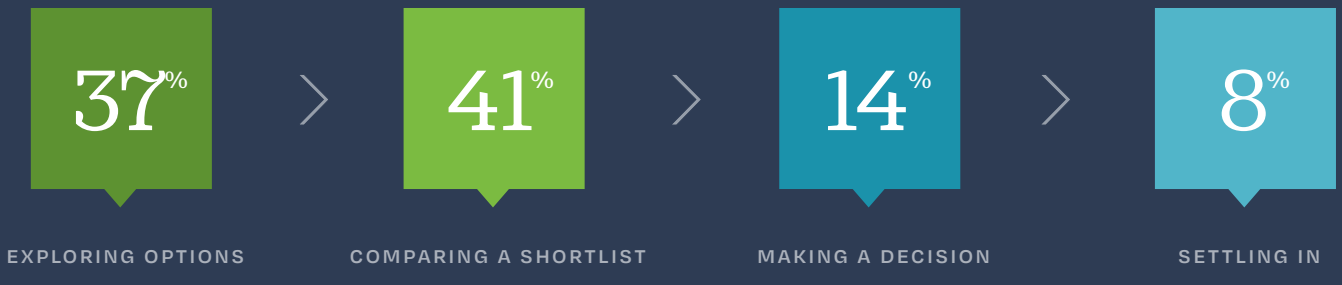
Among relocators who consulted destination information, nearly four in five did so either when first considering potential locations or after narrowing their options to a shortlist. This suggests that marketing materials play a critical role during the exploration and comparison phases of the relocation journey, helping talent evaluate communities and differentiate between alternatives.

Combined with our finding that most relocators move within six months of first considering relocation, the implication is clear: communities must build familiarity before relocation becomes an active consideration and provide practical, trustworthy information once talent begins evaluating options. By the time someone starts seriously researching a move, the decision window may already be quite short.

79% **of relocators consulted marketing materials at some point in their decision-making journey**

When Destination Content Matters Most

Among relocators who consulted destination information, nearly four in five did so during the exploration and comparison stages of their journey.



At what point in your relocation decision-making process did you look for or consult marketing materials or other information on different locations?



What Content Is Most Impactful?

Respondents who cited internet research or social media as top sources shaping their perception were asked to identify the main resources that would help them decide on a new place to live. Detailed cost of living comparisons lead by a noteworthy margin, ranked by 46% of Americans and 45% of Canadians. Talent also shows interest in finding out more about local employers and job opportunities, neighborhoods, success stories of similar people who relocated, and statistics and rankings. Place brands and organizations should develop these resources as part of a baseline toolkit for talent.

Most Influential Content

Which of the following online resources would most influence your relocation decision? *(select up to 3)*

1) **Detailed Cost of Living Comparisons**

2) **Local Employers & Job Opportunities**

3) **Neighborhood Content**

4) **Success Stories & Testimonials**

5) **Quality of Life Statistics**

5 Insights for Place Brands

What makes a community competitive in today's talent landscape? This year's *Talent Wars* suggests that success in a lower-mobility era is not about convincing everyone to move. It is about understanding who is still willing to move, reducing barriers to action, and creating the conditions that help both new and existing residents thrive. Drawing on this year's findings, we identify seven implications for place brands, EDOs and DMOs.

1

Focus on Precision Over Reach

Our survey shows about one-third of respondents are likely to relocate while another 29% remain open to persuasion. Overall, mobility is becoming less common, more selective and more personal. Communities that succeed will be those that understand who is still willing to move, what motivates them and how to reduce the uncertainty surrounding one of life's biggest decisions. In a lower-mobility era, precision matters more than reach.

2

Target Mobility Signals, Not Just Demographics.

In an era of lower mobility, the best talent audiences are often identified by behavior rather than demographics. People who have relocated before are significantly more likely to relocate again, while those actively searching for work are among the most mobile segments in the labor force. These findings suggest that communities should focus less on broad demographic profiles and more on identifying audiences already experiencing mobility triggers. Former residents, recent graduates, active job seekers, career changers and others navigating periods of transition may represent a smaller audience, but one with a much higher likelihood of taking action.



3

Make the Move Feel Possible

Quality of life, jobs and amenities may inspire interest, but talent ultimately needs confidence that a move will work financially and professionally. Affordability, housing, economic stability and career opportunity increasingly determine whether relocation feels possible in the first place. Communities cannot solve every barrier individually, but they can influence many of the factors that shape talent decisions. Building a strong economy, creating opportunity, supporting workforce development, investing in quality of life and delivering trusted information are not separate from talent attraction. They are talent attraction.

> “The most competitive communities don’t just attract talent. They create places where talent can envision building a future.

4

Market an Entire Life, Not Just a Job.

Quality of life remains one of the strongest drivers of relocation, yet talent defines it through a much broader lens than employment opportunities alone. Financial security, stability, health, safety, relationships, community and personal fulfillment all contribute to the equation. Communities compete not only on the jobs they offer, but on whether people can build a healthy, affordable and meaningful life there. The most compelling place brands help talent envision an entire future, not simply a new position.

5

Retention and Attraction Are Now the Same Conversation.

As mobility slows and workforce growth becomes more constrained, communities can no longer rely on attraction alone. Retention, workforce re-entry and development are equally important sources of talent competitiveness. Many of the factors that attract talent, such as opportunity, belonging, safety and quality of life, are the same factors that encourage people to stay. The strongest talent strategies recognize that attracting talent and retaining talent are fundamentally connected goals.



6

Market to Households and Social Lives, Not Just Workers.

Relocation decisions are rarely individual decisions. Partners, families, peer groups and support networks all influence whether a move feels worthwhile. Communities that focus exclusively on employment opportunities risk overlooking many of the considerations that ultimately determine relocation outcomes. Successful talent attraction helps an entire household envision a future in a community while demonstrating that newcomers can build meaningful connections, relationships and a sense of belonging.

7

Win Consideration Before Relocation Is on the Table.

Relocation decisions often happen quickly, but perceptions of places form over years. Visitor experiences, social media, online research, destination content and word of mouth all shape how communities are perceived long before someone actively considers moving. By the time relocation becomes a realistic possibility, many impressions have already been formed and decision windows may be short. Communities that invest in building familiarity, trust and credibility early are more likely to earn a place on the shortlist when opportunity finally arises.



6 Citations

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About DCI

For more than 65 years, DCI has helped cities, regions and countries attract the people and investment needed to thrive. As the only full-service agency focused exclusively on tourism, economic development and talent attraction, DCI helps communities strengthen the three pillars of a healthy economy: attracting visitors, encouraging business investment and growth, and inspiring talent to live and work in a place.

DCI combines proprietary research, place-branding expertise and integrated marketing capabilities to help communities compete for talent and build stronger economies. In partnership with Lightcast, we provide labor market intelligence and workforce insights that help organizations understand talent availability, workforce trends and competitive positioning. As the publisher of the annual *Talent Wars* study, DCI helps clients translate data and insights into strategies that attract, retain and engage talent.

Our areas of expertise include:

- Labor Market Intelligence *(in partnership with Lightcast)*
- Talent Attraction & Retention Strategy
- Audience & Brand Health Research
- Place Branding & Messaging
- Marketing Strategy & Campaign Development
- Digital Marketing & Paid Media
- Website Strategy & Development
- Public Relations & Communications
- Social Media & Influencer Engagement
- Workshops, Training & Speaking Engagements

Interested in learning how we can help turn these insights into action for your community? Contact DCI's Senior Vice President of Talent Attraction Patience Fairbrother Wallace at: **patience.fairbrother@aboutdci.com**

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