State of Global Hiring Report

2025

deel.

Introduction

Cross-border hiring has matured, as companies from high-growth startups to Fortune 500 enterprises now have access to years of data on where international hiring works and where it doesn't. Workers in volatile economies have figured out how to protect their earnings, and job categories that didn't exist two years ago now employ tens of thousands globally.

We analyzed over one million worker contracts spanning 37,000+ companies in 150+ countries, from venture-backed startups to global enterprises.

Four patterns stood out.

1 Top-funded startups go global early, hiring for specialized talent, not cost savings

Among startups that raised $100M+, cross-border hiring concentrates in wealthy countries like the UK, Canada, and Germany. Software developers and AI engineers—roles requiring rare expertise, not outsourcing opportunities—dominate their hires.

Enterprises use these same corridors but prioritize compliance, data analysis, and regulatory roles as they navigate complex global operations.

2 Emerging markets see explosive salary growth in operational roles

Operational roles in emerging markets saw explosive growth—with some Latin American positions gaining over 200%—while U.S. project managers saw 24.5% increases. Less mature markets reward foundational business functions, while established markets reward leadership and specialization.

3 AI trainers emerge as a distinct profession

General AI trainer roles grew 283% in 2025. The occupation now spans tens of thousands of workers across 300+ organizations, from basic annotators to subject matter experts in medicine and economics.

4 Workers adapt payment strategies to economic conditions

Contractors in high-inflation markets frequently choose USD or stablecoins over local currencies. When Croatia and Bulgaria adopted the euro, workers didn't switch entirely, and many maintained USD as a hedge.

1

Pillar 1: State of the market

Top-funded startups go global early, hiring for specialized talent

The most well-funded startups are expanding internationally earlier than ever to access new markets, and they're hunting for specialized talent in new and competitive markets, not outsourcing to cut costs.

Among almost 100 startups founded between 2020 and 2025 that raised at least $100 million in funding, more than 1,400 cross-border employees were hired as employees of record in 2025. 55% of these startups are headquartered in the US, with additional concentrations in the UK, Israel, France, Sweden, and Germany.

The geographical distribution of their hires shows that top-funded startups hire in wealthy, high-income countries. The UK leads (12.2% of employees), followed by Canada (11.9%), Germany (8.8%), Australia (5.8%), and Spain (5.2%). This contrasts sharply with the broader SMB population, which hires more heavily from the Philippines, Mexico, Colombia, and India.

Software developers make up 28% of cross-border hires among top startups, followed by ICT account managers (6.2%), business developers (4%), and AI engineers (2%). When compared to general SMBs, top startups are significantly more likely to hire software developers (13.6 percentage point gap), tech sales roles (3.7 pp), sales engineers (1.8 pp), and AI engineers (1.3 pp). SMBs, by contrast, hire more customer service representatives (2.4 pp gap) and sales managers (1.5 pp).

Top startups use cross-border hiring to access rare high-value skill sets like sales engineering (which combines sales and software expertise) and AI engineering (which combines mathematics and software development), not to reduce costs.

For these companies, the first international expansion is typically into Canada for US-based firms, or into the US for non-US firms. While startups use cross-border hiring to access scarce technical talent, enterprises leverage these same corridors to build compliance infrastructure and regulatory capabilities across markets.

Top worker countries for


12.2%


5.8%


11.9%


5.2%


8.8%

1 Pillar 1: State of the market

Urban gravity: Remote workers are moving closer to major city centers again

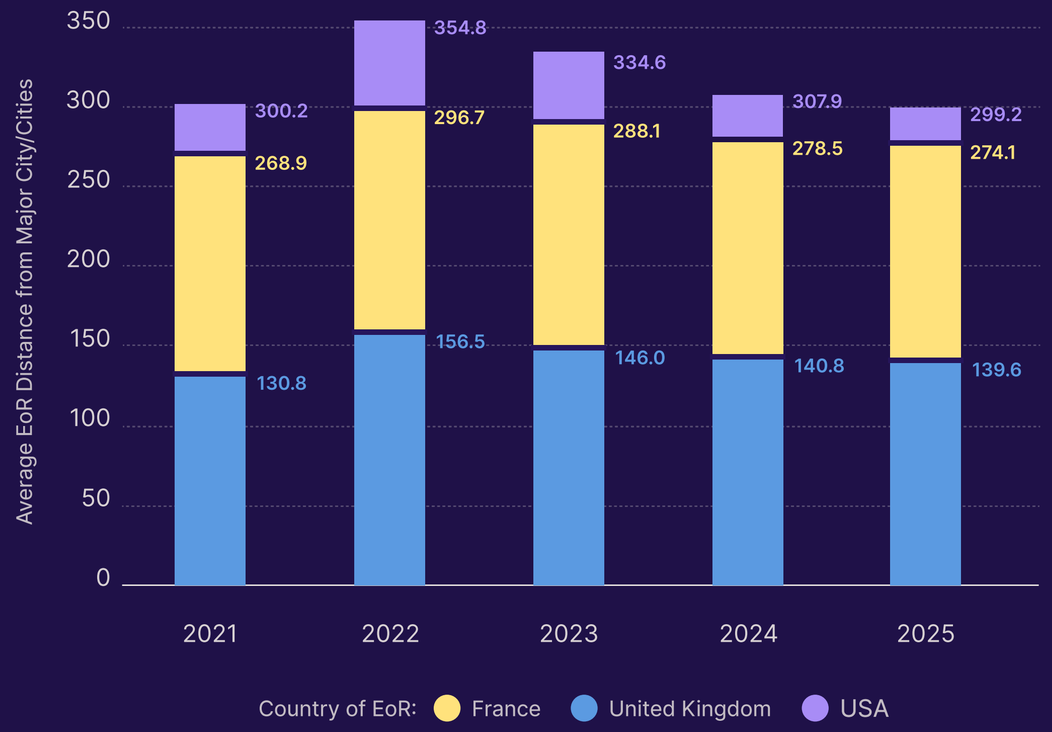
Remote work doesn't mean workers can—or want to—live anywhere. After an initial exodus from major cities following the pandemic, cross-border employees are gradually moving back toward urban centers.

The average distance of employees of record from major cities rose in 2022 but has declined every year since. In the US, the trend is particularly pronounced: workers are now located as close to major cities (New York, Los Angeles, Chicago, Houston, and San Francisco) as they were in 2021. Similar patterns appear in the UK (measured from London) and France (measured from Paris).

The reversal suggests that even fully remote workers value proximity to urban centers. Return-to-office mandates may play a role—workers who expect occasional in-person requirements are less likely to relocate far from cities. Cultural and lifestyle factors likely matter too: after a few years of remote living, some workers appear to be choosing urban or suburban proximity over rural isolation.

Because Deel was founded shortly before the pandemic, it's not possible to compare current distances to pre-2020 levels. However, given documented migration patterns between 2019 and 2021, average distances today are likely still higher than they were before the pandemic, but the gap is narrowing.

Changes in Distance From Major Cities for EOR Employees Since 2022



1 Pillar 1: State of the market

Cross-border hiring concentrates in familiar corridors

Beyond startups, cross-border hiring across all companies follows predictable patterns shaped by language, proximity, and regulatory alignment.

Top 3 Employee of Record (EoR) Paths for Top 5 Hiring Countries, with Percentage Growth 2024–2025

United States		United Kingdom		Australia		Germany		Canada	
12.8%	Canada	44.1%	United States	43%	Philippines	17%	Spain	22.5%	United States
22%	United Kingdom	30.9%	Spain	16.6%	United States	38.8%	United Kingdom	56.5%	United Kingdom
24.1%	India	4.2%	Germany	61.5%	India	28.7%	Netherlands	82.1%	India
30.2%	Philippines	11%	Netherlands	14%	United Kingdom	12.7%	Portugal	45.9%	Australia

The US or UK appears in the top 3 worker countries for every major hiring market

Geographical proximity and language are stronger decision factors than salary or taxes for cross-border employee hires

1 Pillar 1: State of the market

The roles being hired cross-border vary by employment type. Across all globally hired workers (both employees of record and independent contractors), the top three roles are software developers, sales managers, and business developers.

Top cross-border roles*

- #1 Software developer
- #2 Sales manager
- #3 Business developer
- #3 Sales account manager
- #3 Customer service representative
- #1 ICT account manager (tech sales)
- #2 Marketing manager
- #3 Client relations manager
- #3 Product manager
- #3 Commercial sales representative

*for employees of record

Regional hiring priorities differ sharply

Where companies are located shapes what they hire for, and one pattern stands out: sales and marketing roles dominate cross-border hiring because local market knowledge is critical for expansion. Seven of the top ten cross-border roles are in sales, marketing, or customer-facing functions. Sales managers, business developers, ICT account managers, and client relations managers all require deep understanding of local business cultures, customer expectations, and market dynamics. That knowledge is nearly impossible to replicate from abroad.

US-based companies expanding cross-border prioritize business development roles like ICT account managers and customer experience managers. Companies expanding into the EU hire for regulatory affairs managers, marketing assistants, and cyber incident responders, reflecting both the need for local sales expertise and the regulatory complexity of European markets. The emphasis on local sales and marketing talent may also serve as a hedge against automation: while AI can support many operational functions, the ground knowledge required for sales remains difficult to automate.

Company size determines hiring strategy

Enterprises and small-to-medium businesses (SMBs) both rely on cross-border hiring, but for fundamentally different strategic purposes. Enterprises hire for compliance, risk management, and regulatory expertise as they navigate complex global operations. SMBs hire for core operational scaling and customer-facing growth.

Enterprises are significantly more likely to hire data analysts (1.5 percentage point difference), financial fraud examiners (0.9 pp), human resources officers (0.8 pp), and compliance directors (0.7 pp)—roles focused on compliance and specialized functions. SMBs, by contrast, concentrate hiring in core operational roles: software developers (5.4 pp difference), customer service representatives (2.00 pp), sales account managers (1.1 pp), and client relations managers (0.9 pp).

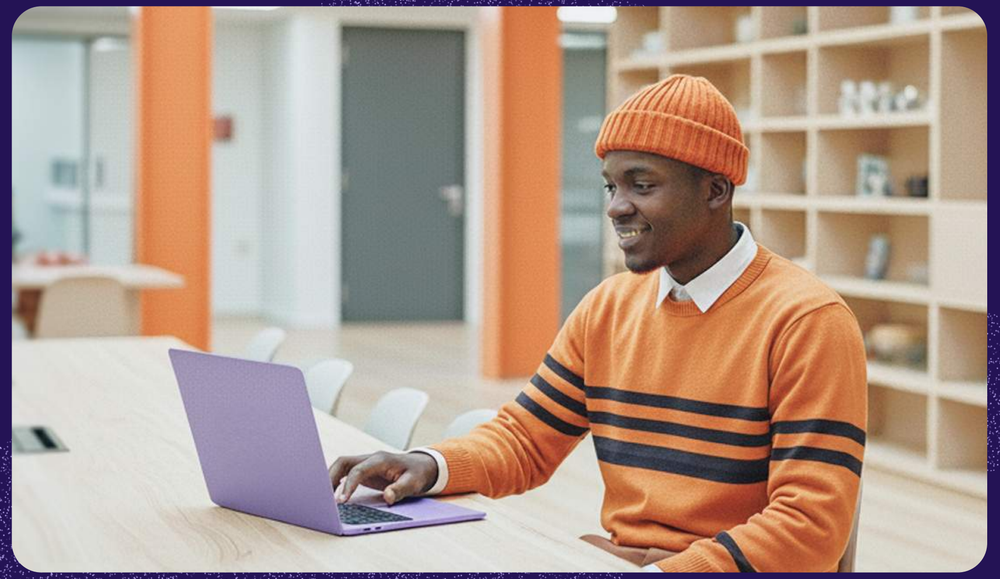
1 Pillar 1: State of the market

Fastest-growing roles signal new demand

AI trainer roles—workers who label data, provide feedback, and help refine AI system outputs—rank first and third in growth, at 283% and 125%, respectively. Legal case managers (164% growth) and medical administrative assistants (123% growth) round out the top four. The rise of AI trainer positions signals that AI is creating entirely new categories of work that didn't exist a few years ago. While the long-term impact of AI on existing roles remains to be seen, the immediate effect is job creation in training, quality assurance, and AI oversight functions.

Industry growth varies by worker type

Cross-border hiring growth varies widely by industry. For employees of record, professional and business services came out as the top-growing industry, followed by government and nonprofit organizations, and manufacturing and industrial companies. When including all globally hired workers, healthcare and life sciences moved to the top, followed by real estate and construction, and then professional and business services.



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Pillar 2: Compensation trends

Leadership roles drive pay growth globally, but regional patterns diverge

Compensation growth in 2025 concentrated in senior leadership positions across most markets, but the drivers of pay increases varied sharply by region and role type.

In the US, leadership and technical roles dominated compensation growth. Project managers led at 24.5%, followed by Chief Operating Officers (21.6%) and Chief Executive Officers (20%). AI engineers, ICT help desk agents, ICT presales engineers, user interface designers, and ICT account managers followed the pack.

ICT (tech) account managers saw 15% salary growth, reflecting sustained demand for technical sales expertise. These roles, which combine technical knowledge with customer relationship management, also appeared consistently in cross-border hiring across regions, suggesting companies prioritize local sales expertise even as other functions remain distributed.

99.8%

COOs in LATAM saw compensation growth of 99.8%, compared to 21.6% in the US.

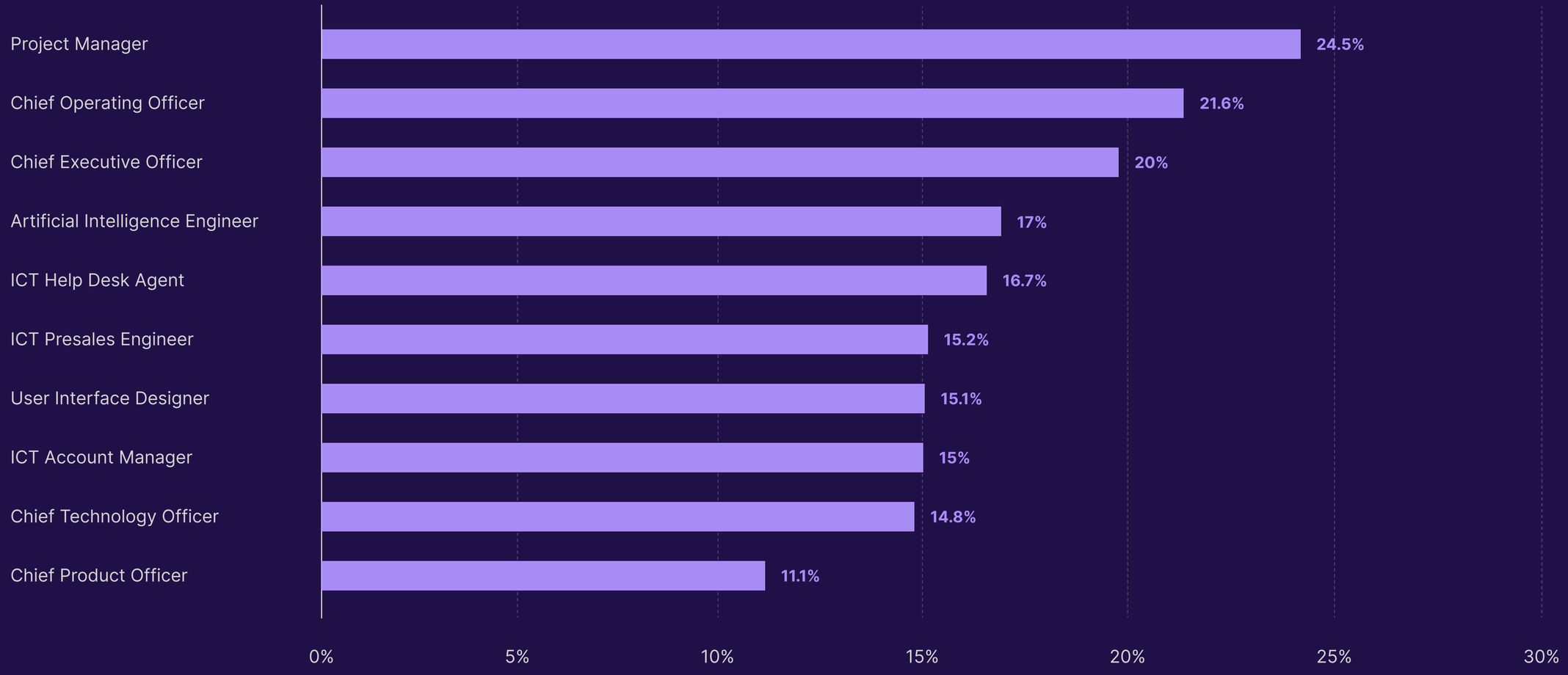
39.6%

Project managers in Australia and New Zealand gained 39.6%, while the same role saw 18.2% growth in the UK.

2 Pillar 2: Compensation trends

U.S. Top 10 Roles by Compensation Growth

Percentage growth in median compensation, 2024-2025



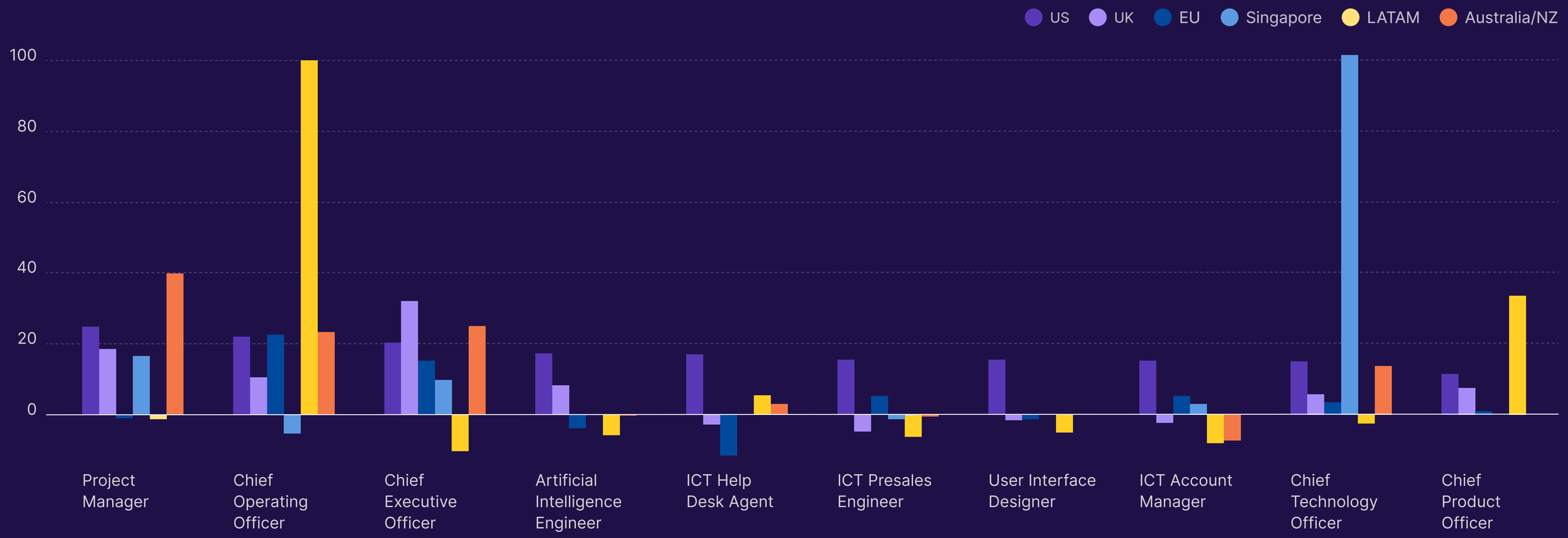
2 Pillar 2: Compensation trends

Regional comparison reveals different market dynamics

The same roles showed strikingly different compensation trajectories across regions. C-suite positions gained ground nearly everywhere, but technical and operational roles diverged.

Compensation Growth for Key Roles Across Regions

Percentage growth in median compensation, 2024-2025



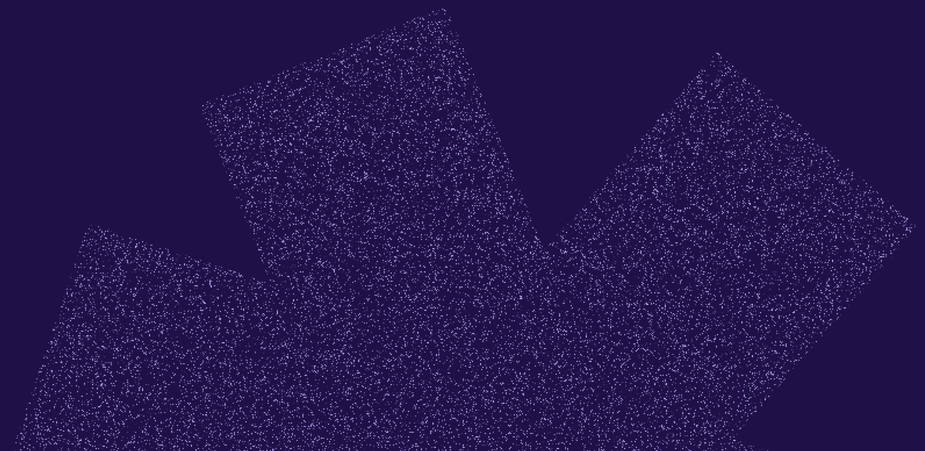
2 Pillar 2: Compensation trends

In the United Kingdom, CEOs led with 31.7% increases, but many other roles saw modest or flat growth. ICT account managers showed negative growth, while UI designers declined 1.4%.

Singapore showed extreme CTO compensation growth at 101%, but other technical roles contracted—ICT presales engineers fell 0.5%, and ICT account managers dropped 7.4%.

The EU mirrored U.S. patterns for leadership (COOs up 22%, CEOs up 15%) but diverged sharply for technical roles. AI engineers declined 3.6%, and ICT help desk agents fell 11.6%.

Australia and New Zealand saw strong growth in project managers (39.6%) and C-suite roles, but technical sales positions like ICT account managers declined 7.4%.



Latin America showed the most dramatic shifts. Among roles comparable to the US top ten, COOs gained 99.8%, but most other positions declined or stayed flat. CEOs actually dropped 10.3%, and ICT account managers fell 8%.

The regional divergence suggests that mature markets reward established leadership and specialized technical talent, while compensation in emerging markets reflects currency fluctuations, rapid organizational growth in specific sectors, and shifting demand for operational versus strategic roles.

2 Pillar 2: Compensation trends

LATAM's explosive growth concentrates in operational roles

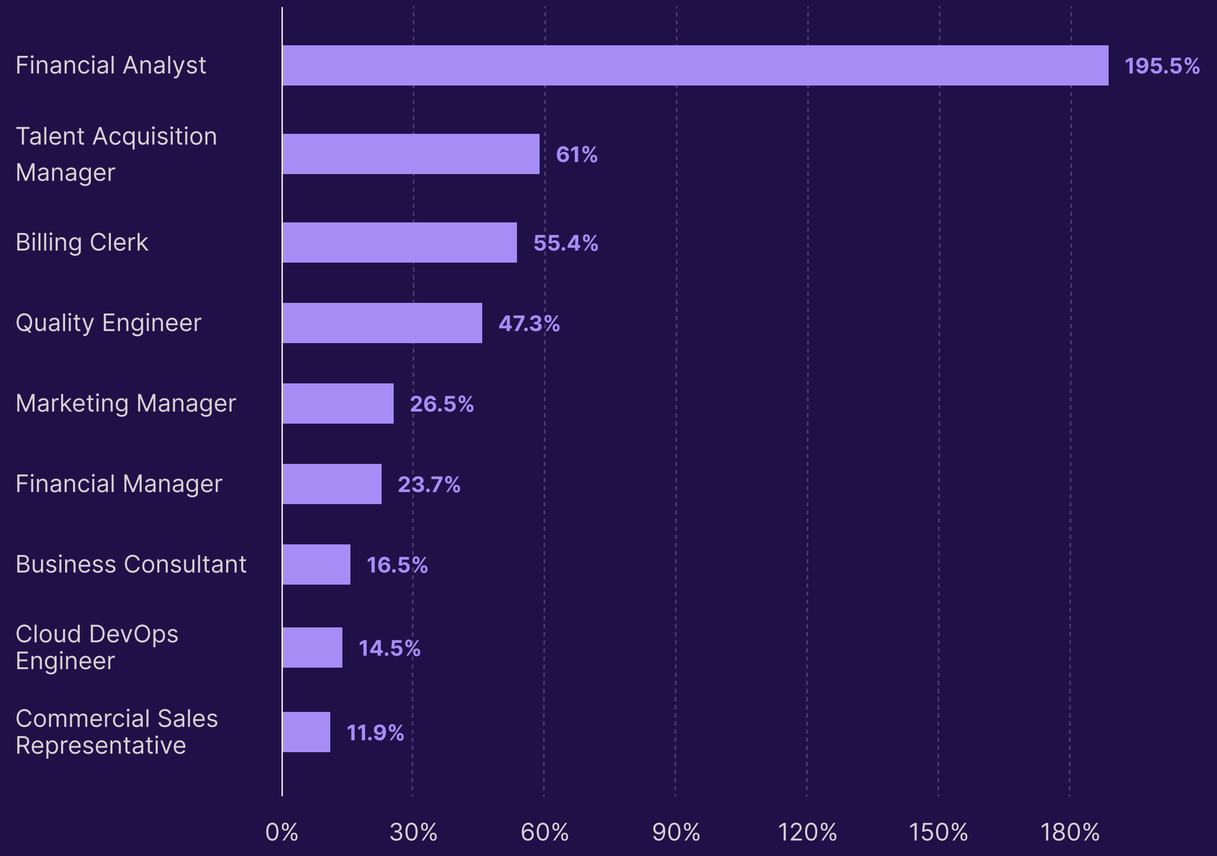
When examining LATAM's fastest-growing occupations overall—rather than just those comparable to U.S. trends—a different story emerges. Financial analysts saw 195.5% compensation growth, followed by talent acquisition managers (61%) and billing clerks (55.4%). These are operational and support functions experiencing rapid professionalization as companies build infrastructure in cost-effective regions.

Even after excluding the top three organizations for each occupation, the growth remains substantial: call center agents gained 210.8%, debt collectors 67.9%, and talent acquisition managers 65.1%. This indicates broad-based demand rather than isolated company effects.

The contrast with the US is stark: while the US rewards senior leadership and technical specialization, LATAM rewards foundational business operations like call center operations, debt collection, and talent acquisition. Markets are at different maturation stages, and compensation reflects what each region needs most urgently.

LATAM Top 10 Roles by Compensation Growth

Percentage growth in median compensation, 2024-2025



3

Pillar 3: AI trainers

AI training becomes a global profession

A new category of work has emerged from the development of AI: the AI trainer. These workers now number over 70,000 globally across more than 600 organizations, supporting the development and refinement of AI systems through reinforcement learning from human feedback and human-in-the-loop processes.

AI trainers range from annotators performing data labeling to highly skilled subject matter experts in fields as diverse as economics, medicine, and translation. Many work as contractors for platforms that place them within AI labs or other companies requiring specialized training services. The role's rapid expansion is reflected in hiring data: general AI trainer positions grew 283% cross-border in 2025, making it the fastest-growing cross-border role on our platform.

The geographic distribution of AI trainers reflects the need for linguistic diversity and subject matter expertise across regions. 58.2% of AI trainers are based in the US, followed by India (7.2%), the Philippines (4.6%), Canada (2.1%), and Kenya (1.7%).

58.2%

AI trainers based in the US, the largest concentration globally.

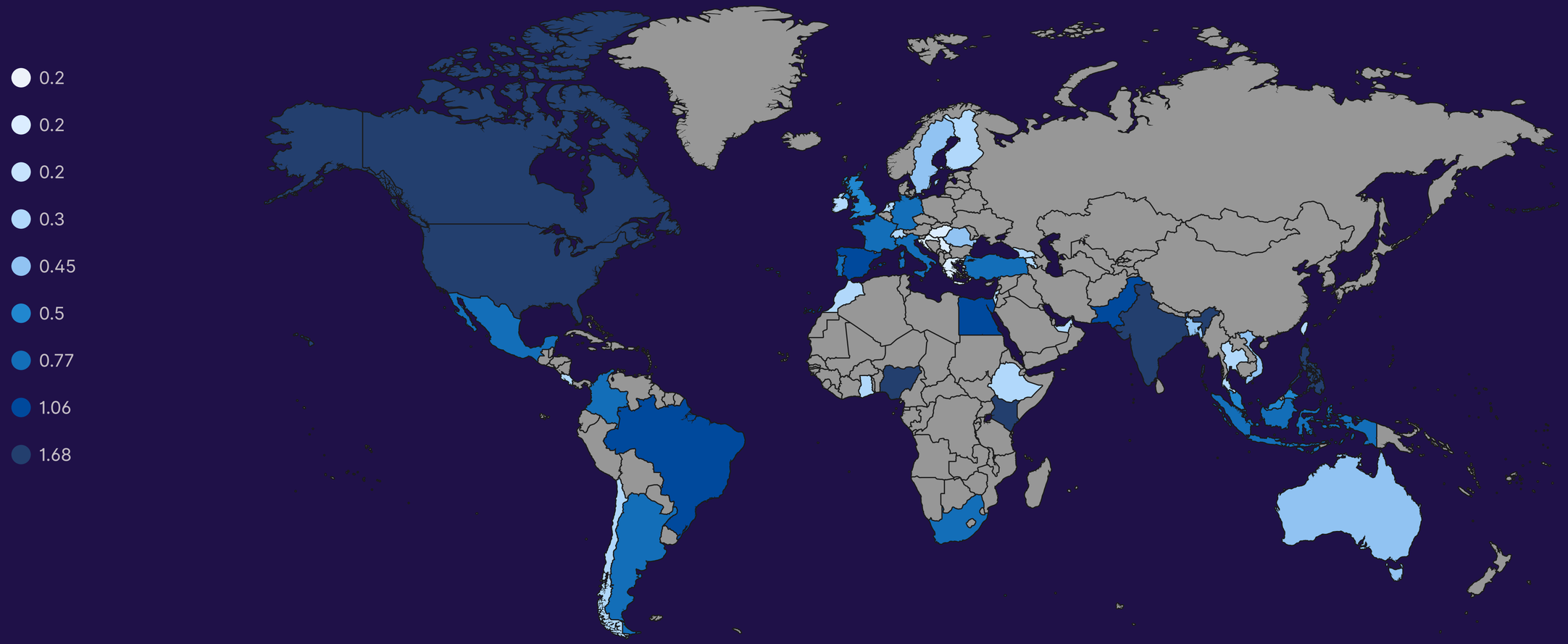
600+

Organizations employing AI trainers, many of them platforms placing trainers with AI labs.

3 Pillar 3: AI trainers

AI Trainers Around the World

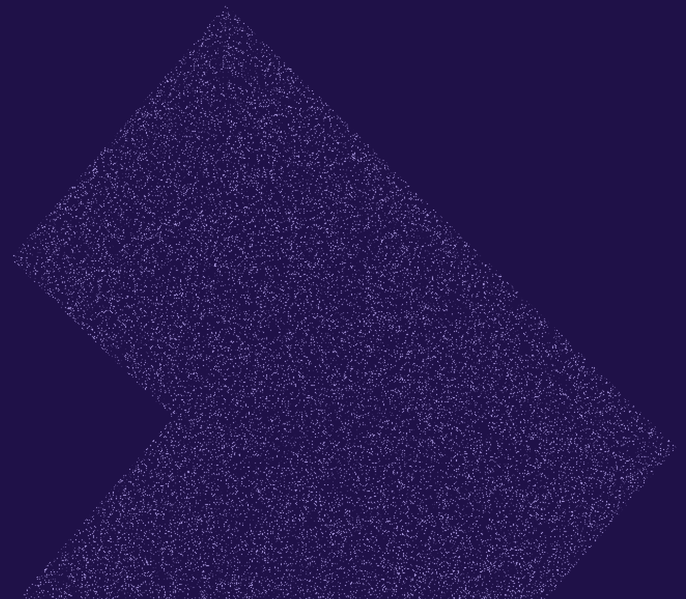
Percentage of AI trainers on Deel's platform by country of residence



3 Pillar 3: AI trainers

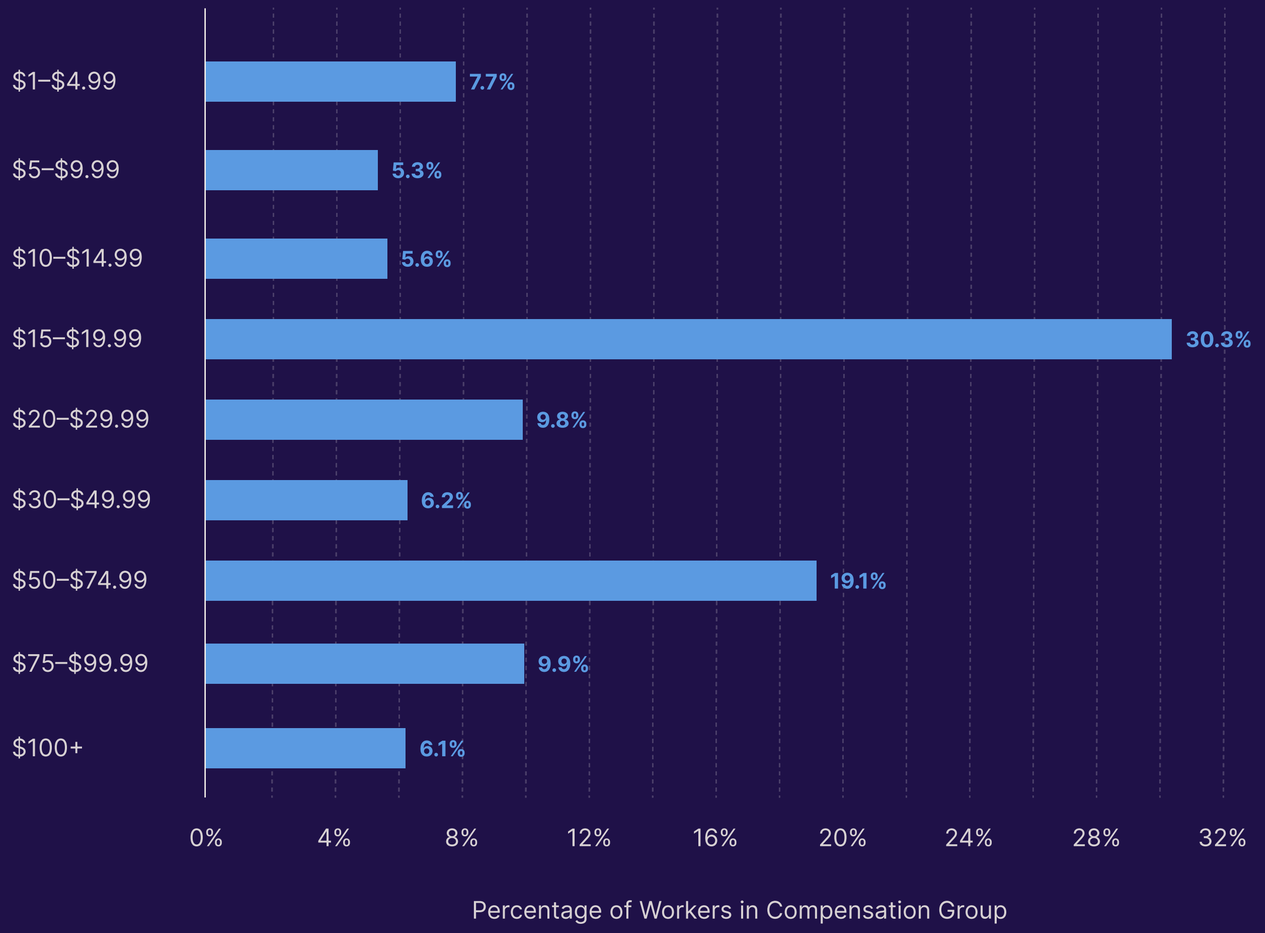
The distribution aligns with the need for regional expertise: AI labs often need to verify outputs with native speakers or experts from specific regions, requiring a globally distributed workforce rather than concentration in traditional tech hubs alone. As AI systems expand into more languages and specialized domains, demand for trainers with diverse expertise will likely continue to grow.

Compensation for AI trainers reflects the wide range of skills required. Pay is bifurcated: 30.3% of trainers earn between $15-20 per hour, while 19.1% earn $50-75 per hour, and 6.1% earn over $100 per hour. This distribution aligns with the role's diversity, as basic annotation work commands lower rates while subject matter experts in specialized fields earn significantly more.



Distribution of AI Trainers Hourly Comp, Worldwide

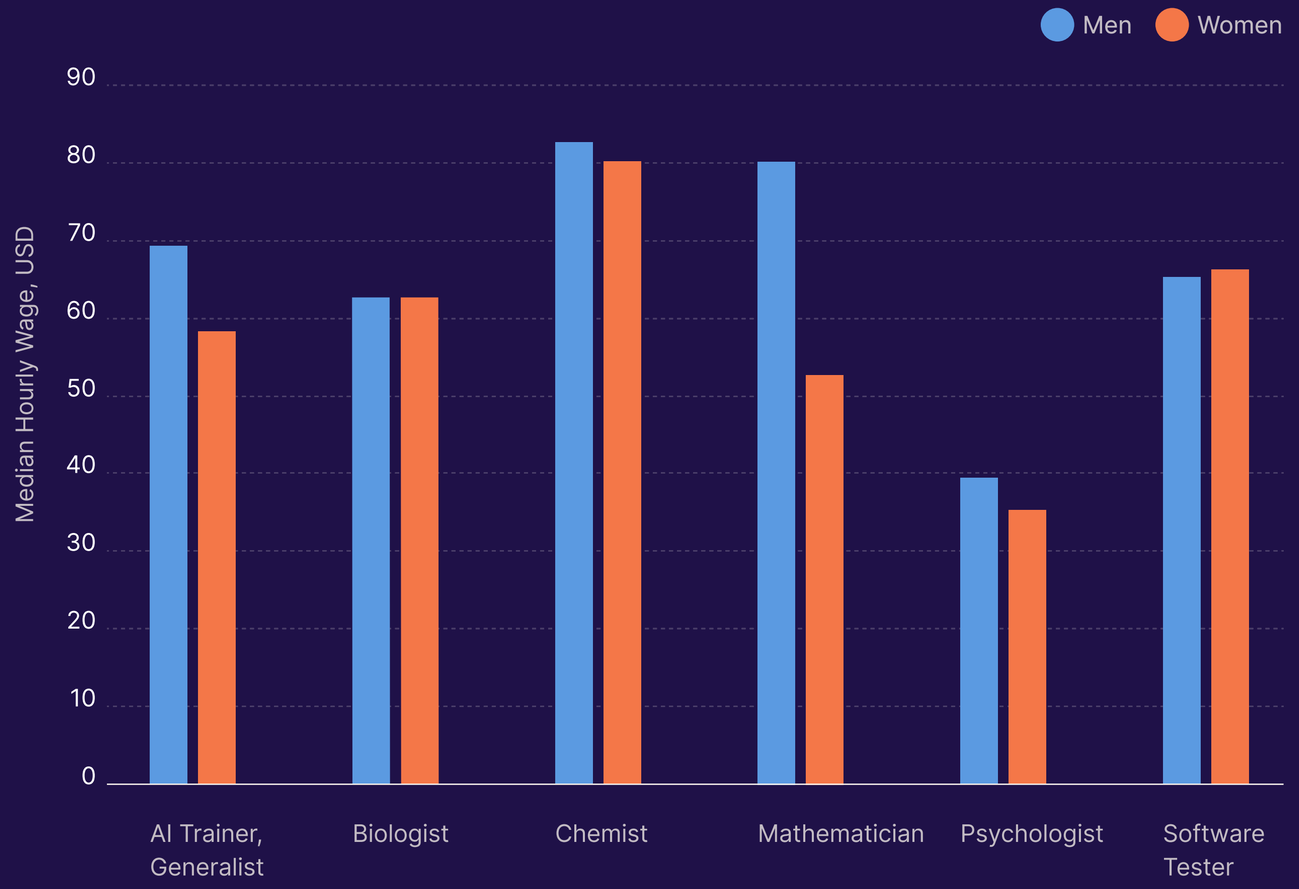
Hourly compensation rate, USD



3 Pillar 3: AI trainers

Gender disparities in AI trainer compensation are more pronounced in high-income countries. In the US, male AI trainers earn a median of $50 per hour compared to $30 for female trainers. This gap reflects occupational segmentation: 55% of psychologist AI trainer roles are held by women, while only 26% of mathematician AI trainer roles are. Similar patterns appear across other high-income markets, where more specialized and higher-paying AI training roles skew male.

Median Hourly Comp of AI Trainers in the US, by Occupation and Gender



4

Pillar 4: Currency hopping

Workers adapt payment strategies to economic conditions

As inflation volatility persists across emerging markets, workers in contract roles are frequently choosing to be paid in US dollars or stablecoins rather than their local currencies, reflecting both economic uncertainty and the global nature of their work.

The contractors on Deel's platform, whose work commands global rates, show distinct payment preferences based on location and economic conditions. In high-inflation markets, contractors are more likely to withdraw payments in USD to protect purchasing power and align with global rate expectations for their work.

This pattern extends across contractor populations. In 2025, USD appeared in five of the ten most common country-currency combinations globally. In Argentina, more workers chose to be paid in USD than in their local currency, while Bolivia's payment preferences fluctuate directly with inflation rates: when inflation rises, contractors shift to USD; when it stabilizes, local currency adoption increases.

5 of 10

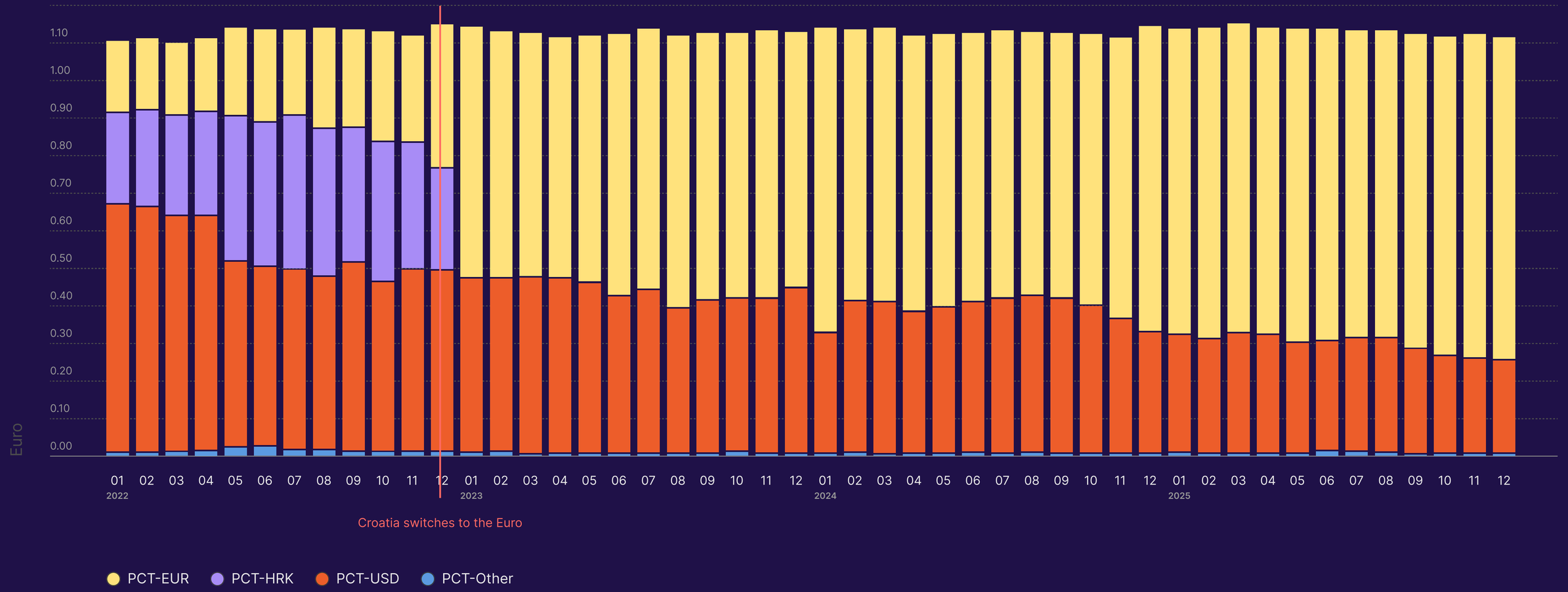
USD appeared in five of the ten most common country-currency combinations globally in 2025.

Currency adoption patterns reveal how workers adapt to monetary policy changes. When Croatia introduced the euro on January 1, 2023, contractors immediately stopped withdrawing in Croatian kuna. However, they didn't switch entirely to euros. While kuna withdrawals were replaced by euros, contractors continued to withdraw significant amounts in USD. Over time, the share withdrawing in euros has increased slowly and steadily, but USD remains a hedge option.

Bulgaria shows a similar pattern. When the country entered the eurozone in January 2026, withdrawals in the local currency dropped to zero, replaced by euros, with pockets of USD remaining.

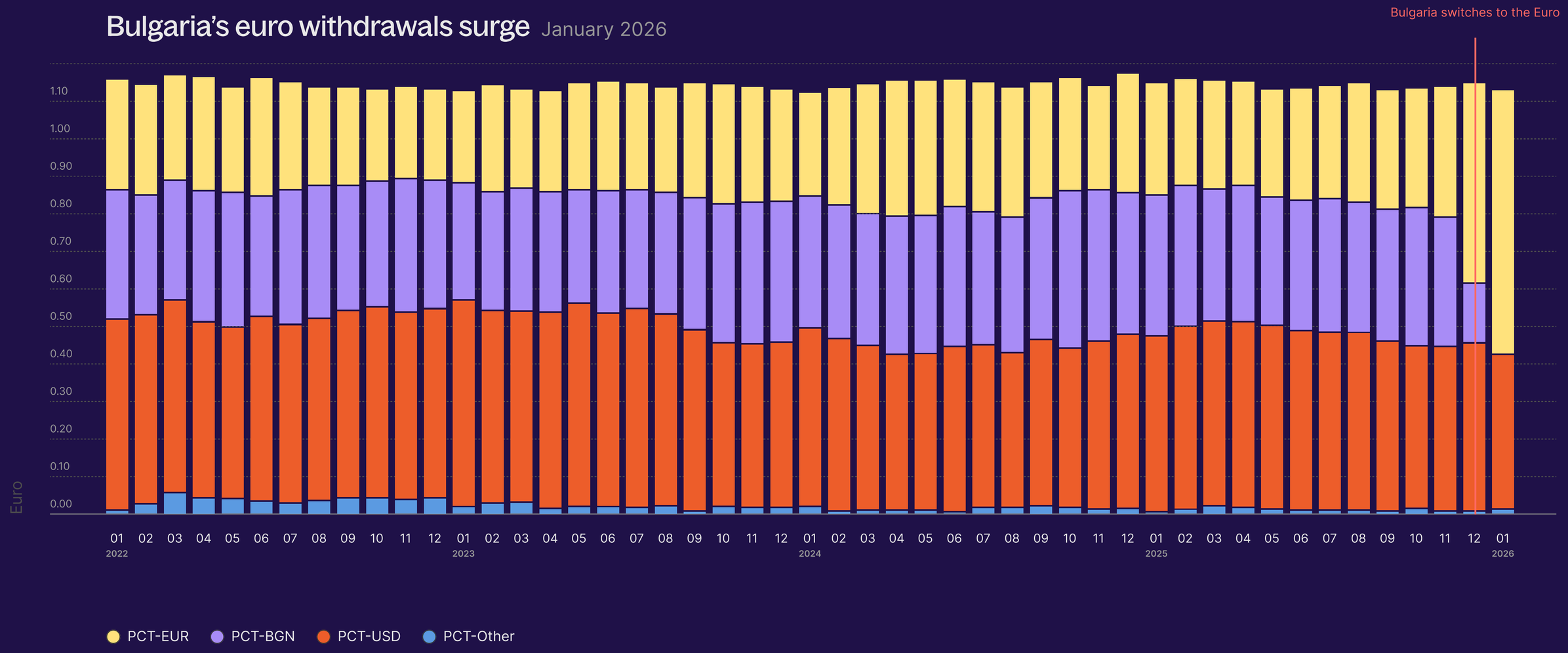
4 Pillar 4: Currency hopping

Croatian contractors switched to the euro from HRK overnight



4 Pillar 4: Currency hopping

Bulgaria’s euro withdrawals surge January 2026

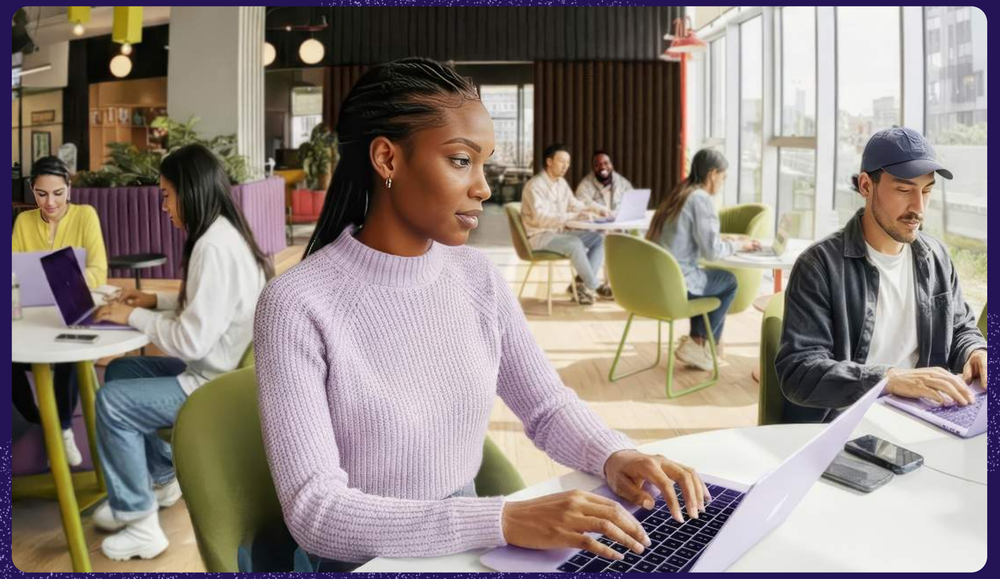


4 Pillar 4: Currency hopping

Beyond eurozone transitions, euro adoption varies widely by proximity and economic ties to the EU. Kosovo and Montenegro lead in euro withdrawals, as both countries have unilaterally adopted the euro as legal tender. Algeria shows high euro adoption due to close ties with France. Eastern European countries like Czechia demonstrate strong euro usage reflecting their integration with eurozone neighbors, while non-eurozone countries with bilateral agreements (Norway, Denmark, Sweden, Switzerland) also show elevated euro rates.

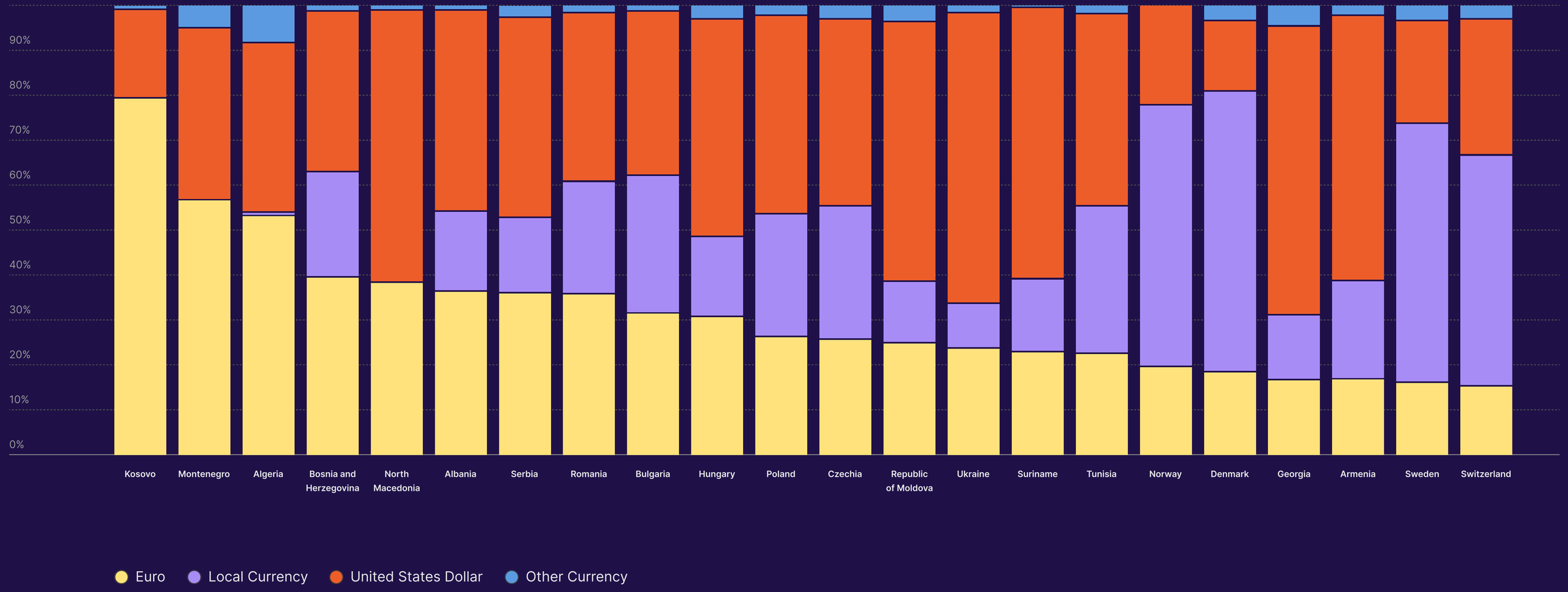
Stablecoin adoption is also gaining traction as an alternative to both local currencies and traditional USD payments. Stablecoins serve as a cheaper alternative to traditional remittances in markets with volatile or restricted currencies, where cross-border payment costs are typically high. Argentina leads stablecoin adoption among contractors, followed by Cameroon, South Korea, Turkey, Vietnam, Tajikistan, Sri Lanka, and Ukraine. While currency instability appears to be the primary driver in most of these markets, the diversity of economies adopting stablecoins suggests additional factors—such as remittance costs and regulatory constraints—may also be at play.

These trends signal a structural shift in how global contractors manage compensation risk. Rather than accepting volatile local currencies, workers are leveraging payment flexibility to protect purchasing power. This dynamic has implications for how companies structure cross-border compensation, manage foreign exchange exposure, and support distributed teams in economically unstable regions.



4 Pillar 4: Currency hopping

Percentage of Contractors Withdrawing in a Given Currency By Contractor Country



Data & methodology overview

General methodology

All contracts that were active on Deel's platform (e.g., paid or managed through the platform) in 2025 were considered in the analysis. Year-over-year comparisons from 2023 or 2024 included all contracts active in those years. Each contract is associated with a compensation in a given currency. These compensation rates were converted to USD (or a local currency if relevant) using the average 2025 foreign exchange rate.

Each worker and organization was assigned an anonymized ID before analysis. Only the data points necessary for the analysis were included; no data that could directly or indirectly identify an individual were visible after data aggregation and anonymisation. At all times, access to the data was limited to a need-to-know basis for a limited number of team members.

Each worker was only counted once per company. That is, if a worker had multiple contracts with the same employer, they were counted a single time, but if they had multiple jobs (a very rare occurrence), they were counted multiple times.

Data & methodology overview

Compensation was calculated using the rate in a worker's contract (usually base salary alone). While Deel also has access to payroll data for workers paid through its platform, this is much more rare than the contract rate, and the contract rate is very accurate. If a worker had multiple compensation rates in a year, we used the most recent rate in that year. Compensation was annualized using the compensation scale present in the contract (daily/monthly/weekly/annual).

Businesses are tagged as small and medium businesses (including mid-market) or enterprises based on the number of employees they have. SMB & MMs have fewer than 2000 employees, whereas enterprises have more.

Clients were assigned industries based on the US Standard Industrial Codes.

- Annual wages were taken as given
- Monthly wages were **multiplied** by **12**
- Weekly wages were **multiplied** by **52.143** weeks in a year
- Biweekly/semi-monthly wages were **multiplied** by **52.143×2**
- Daily wages were **multiplied** by **260** to reflect the approximate number of non-weekend days in a year
- Hourly wages were **multiplied** by **52.143** weeks in a year × **5** working days in a week × approximately **8** working hours in a day

Data & methodology overview

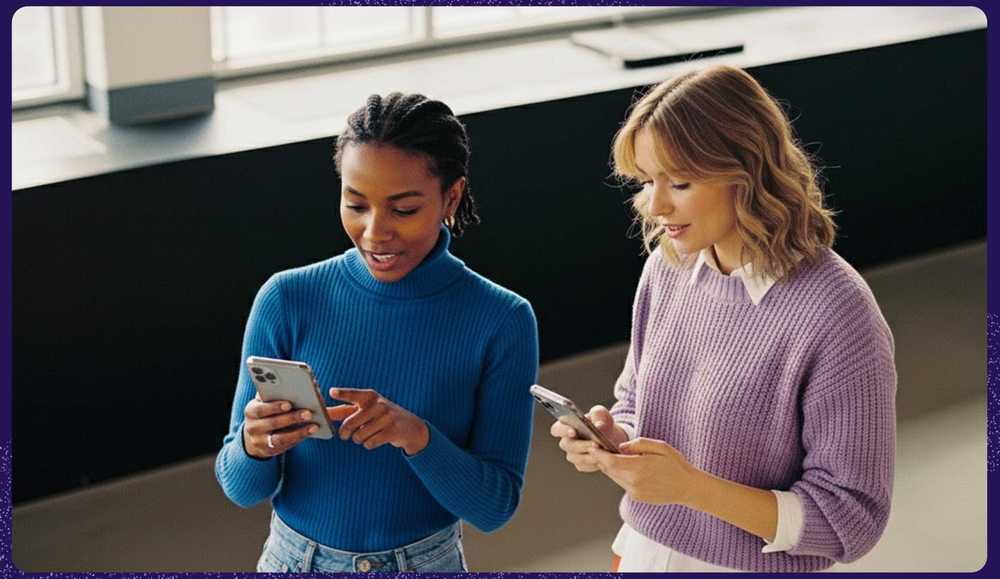
Job type

Any analysis that specifies ‘employee’ only included jobs managed through Deel’s Global Payroll, Employer of Record (EOR), Professional Employer Organization (PEO), and HR products. Some analyses also included independent contractors managed or paid through Deel’s contractor management software.

An employer of record is a service provider that employs workers in another country on behalf of a company. It allows compliant hiring of workers who can not or prefer not to be independent contractors. Professional employer organizations provide the same service across US states, which similarly have different compliance requirements across different jurisdictions.

Cross-border roles

Our cross-border role analysis included both employees and independent contractors hired through Deel’s EOR and contractor management products. Some analyses included both sets of workers, whereas others included only EOR employees (the latter distinguished by the use of the word ‘employee’). A role is defined as cross-border if the hiring company’s legal entity is located in a different country from a worker’s residence.



Data & methodology overview

Occupation matching

Occupations came from the European Commission's European Skills, Competencies, Qualifications, and Occupations (ESCO) occupation classification. We additionally added several AI-trainer-specific occupations that were not in the model but reflected a significant part of Deel's worker base.

Each occupation was associated with several alternative labels and a description provided by the ESCO classification. Each occupation name (including alternative names) was translated into a text embedding using OpenAI's embeddings model. This was repeated for occupation description. These embeddings represent the semantic meaning of the text; that is, two occupations that are "similar" to each other should have embeddings that are mathematically closer together. We then created a single weighted vector to represent the embedding, weighing the occupation example titles 50% and the occupation description 50%.

Each job on Deel's platform was matched to an occupation using a two-step AI model:

1. Firstly, each job's title, description, and industry were transformed into individual embeddings using OpenAI's embeddings model. Each of these embeddings were combined into a single weighted vector, using weights that differed based on various factors (e.g., null job descriptions were weighted almost zero, while longer job descriptions were weighted more strongly than weaker ones). This weighted vector was then compared against the aforementioned combined occupation vector to find the top 7 most similar occupations.
2. These top seven occupations were sent to an OpenAI LLM that had been fine-tuned on hand-selected ground truth. This fine-tuned model was then instructed to pick the top occupation or return 'None' if none of the available options made sense. This resulted in a coverage of about 93% of all jobs active in 2025.

Specific methodology

1 Pillar 1: State of the market

The fastest-growing roles were limited to roles that had at least 100 workers working across at least 25 companies in 2024.

Top startups

The top startups section included all startups active on Deel's EOR product in 2025 with at least $100 million in funding founded between 2020 and 2025. All funding and founding year figures were checked manually.

Urban gravity

Only employees hired through Deel's EOR product were included in this analysis. Because employers of record are by definition located in another country, they are almost always remote workers.

We pulled employees' zip codes and then found the latitude and longitude of the center of the zip code using the Python package pgeocode. This was then compared to a city's latitude and longitude, taken from Geoname's cities geojson. For London, this was Charing Cross's location; for Paris, it was Notre Dame; and for US cities, it was the location of the city hall.

The distance between a zip code's location and a city's location was computed using the st_distance_sphere spatial function in SQL, divided by 1000 to find the number of kilometers between a zip code and a city. For the US, we found the distance between a zip code and its closest "major city" (New York, Los Angeles, Chicago, Houston, and San Francisco). For the other countries, we computed the distance between a zip code and its capital city.

A weighted average (with weights computed from dividing the count of workers in a given zip code, country, and year by the total count of workers in a given country and year) was then computed for each year and country.

2 Pillar 2: Compensation growth

Compensation rates were annualized and compared in USD using 2025's average foreign exchange rates to avoid any impact from changes in FX rates. Independent contractors were excluded from the analysis.

The top-growing compensation roles in the US and Latin America were limited to those that had at least 50 workers in 2024.

Specific methodology

3 Pillar 3: AI trainers

Jobs were matched to AI trainer roles using the process described in the occupation matching subsection above. Nine AI trainer roles were added to the ESCO occupation classification: AI trainer, generalist; mathematician - AI trainer; biologist - AI trainer; physicist - AI trainer; software tester - AI trainer; translator - AI trainer; chemist - AI trainer; psychologist - AI trainer; and doctor - AI trainer.

90% of AI trainer compensation rates were hourly. Non-hourly rates were converted to hourly, assuming 8 hours in a working day, 5 working days in a week, 21.75 working days in a month, and 261 working days in a year. Compensation rates under $1 USD an hour were dropped as nearly all appeared to be errors.

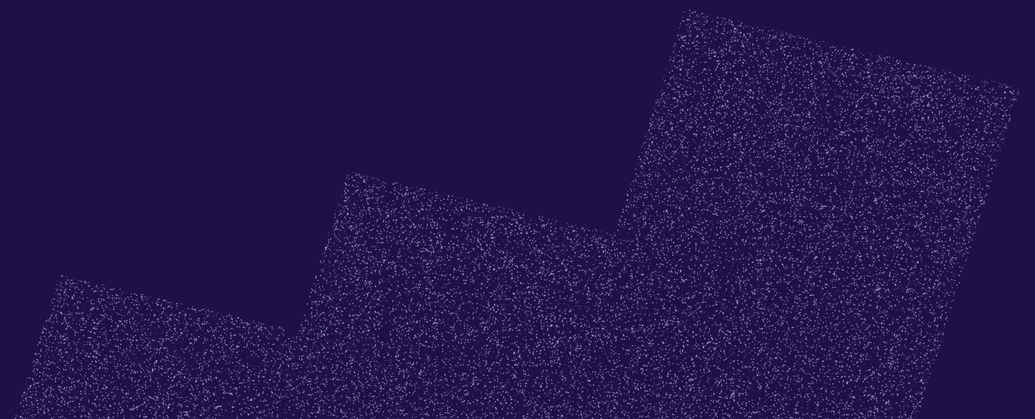
Non-USD compensation was converted to USD using the average foreign rate in 2025.

4 Pillar 4: Currency hopping

Contractors on Deel can choose to be paid outside of their local currency, including in stablecoin. Stablecoins here only include USD-denominated stablecoins. The euro charts exclude stablecoins and cryptocurrencies. All figures exclude Deel Card payments.

Countries with highest stablecoin adoption were limited to those with at least 100 contractors being paid through Deel.

Because contractors can choose to be paid in multiple currencies, the total percentage of contractors by withdrawal currency can add up to more than one.



deel.