



EY 2023 Mobility Reimagined Survey

Survey insights

March 2023



Building a better
working world

About this report

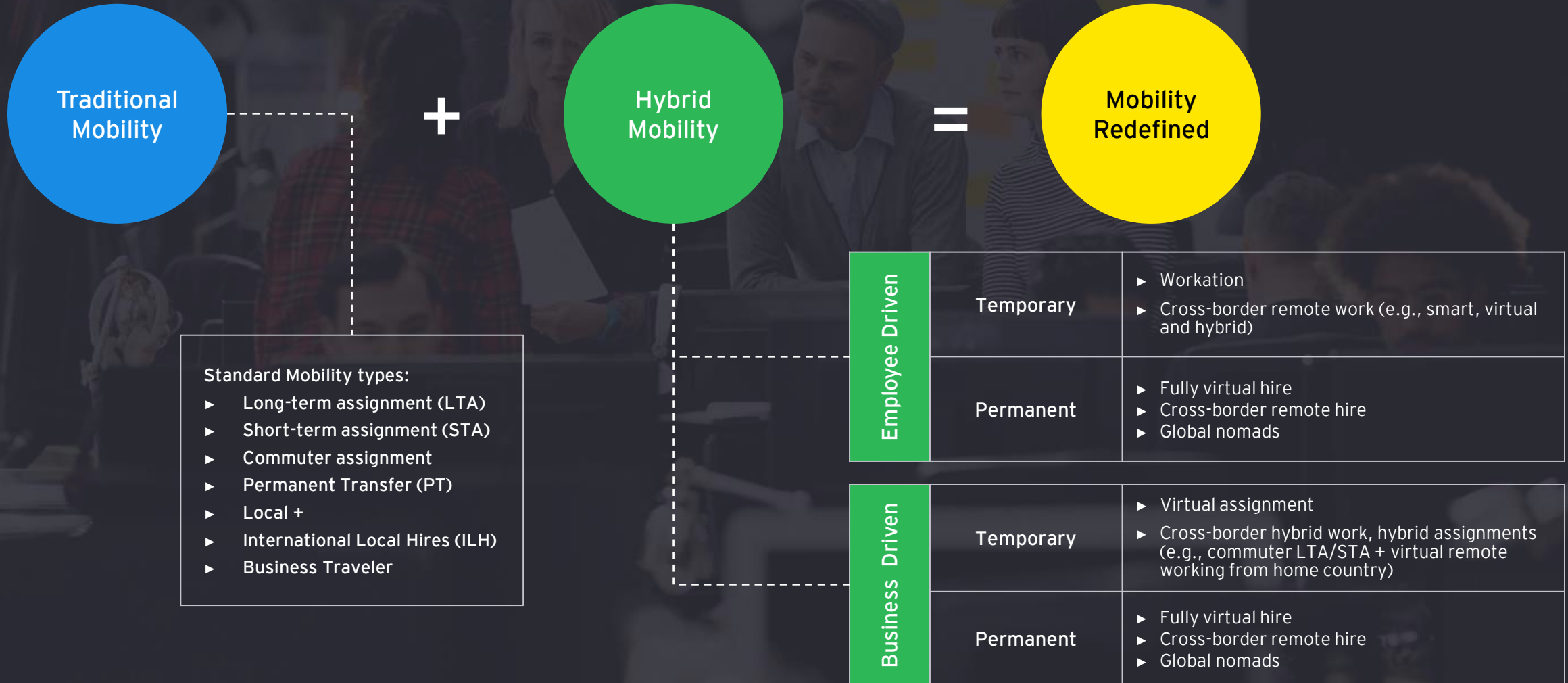
This inaugural survey insights deck summarizes the key insights from the EY 2023 Mobility Reimagined Survey, conducted by EY in December 2022.

Survey demographics

- ▶ Total respondents: 1,026
 - **HR and mobility professionals:** 506
 - **Employees:** 520 (with ongoing or prior international experience*)
- ▶ Geographical representation: 15 global geographies including the US, UK, Germany, Canada and China
- ▶ Top participating sectors: Technology, Media and Telecom (TMT); Consumer Products (CP); Financial Services (FS); Advanced Manufacturing; Health and Life Sciences; and Energy and Utilities
- ▶ See appendix for full demographic breakdown

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Defining Mobility in Today's World



A multitude of forces are shaping the future of work. Organizations need to use their mobility functions to react and respond quickly

Trust and transformation

57% of employees trust their employer and feel supported by them¹

Organizations that put Humans@Center of their transformations are **2.6x** more likely to be successful than those that don't²

Focus: Employee experience/employee value proposition (EVP)

Hybrid work

Hybrid mobility (e.g., temporary and permanent remote work, hybrid cross-border work, virtual assignments, global nomads)

Employees globally now demand flexibility. **84%** want to work from home at least two days a week³

84%

Focus: Multijurisdictional tax risk and cybersecurity

Focus: Getting the right people to the right place

\$1.5t of global business travel spending expected in 2026, with 16% CAGR for 2021-26⁴

Globalization

Transforming
mobility with
Humans@
Center

Focus: Effectiveness

CEOs are changing global investment strategies in the wake of geopolitical tensions⁵

97%

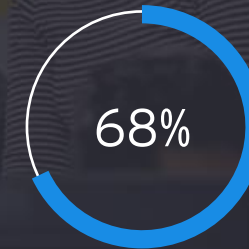
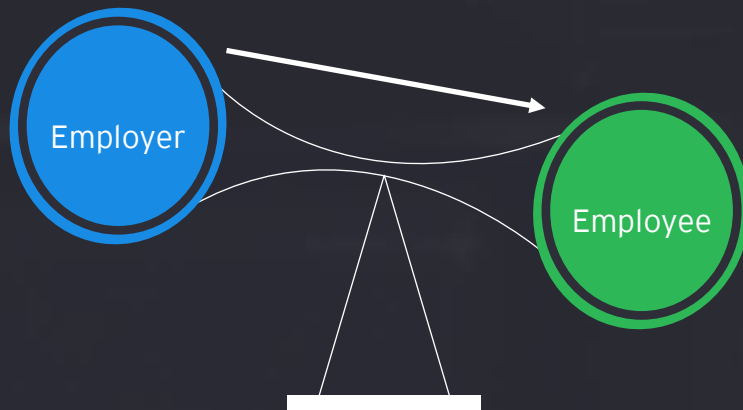
Risk

Source: ^{1&3} EY 2022 Work Reimagined Survey ² EY-Oxford Transformative Leadership Survey 2022, ⁴ GBTA Business Travel Index, 2021 and Statista, ⁵ 2022 EY CEO Outlook Report

2022 saw a major shift in the balance of power toward the employee

88% of organizations agree that the mobility function can be a strategic lever for organizations to address talent attraction and retention

Changes in labor market demographics and employee mindset mean the balance of power shifted to employees. **It remains to be seen if changes in the economic landscape will reverse this trend**



of employers agree **staff turnover has increased** over the past 12 months



of employees say they are **likely to leave their jobs** in the next 12 months

Executive summary

Organizations face a talent paradox - investing in their people while staying agile to deal with uncertainty



- ▶ Amid economic headwinds, increased complexity and risk, organizations need to break mobility out of an operational silo to become a strategic influencer across functions.
- ▶ Reimagining mobility can grow business and grow talent, part of a strategy rooted in attracting, retaining and growing the skills needed for the future shape of an organization.

It is an opportunity to leverage mobility to build value for both employees and business, especially with growing global competition for talent and high rates of employee burnout



- ▶ 88% of employers consider mobility as a way to address talent shortages.
- ▶ 76% of employers believe mobility influences overall organizational strategy.
- ▶ In the face of continued uncertainty, 74% of employers agree that mobility function is critical to business continuity.

But the function requires targeted investments to deal with multiple operational risks and accelerate technology adoption



Most organizations are ill-equipped to handle risks

- ▶ Only 29% of employers strongly agree that they are equipped to deal with changing geopolitical circumstances.
- ▶ Just 49% of mobility professionals said their organizations consistently track employee movement across domestic or international jurisdictions.

Hybrid mobility policy is still a work-in-progress for most employers

- ▶ 76% mobility professionals said their organization has some kind of policy or approach to hybrid mobility.
- ▶ Only 47% employers say their hybrid policies are globally consistent, with even fewer (41%) saying their hybrid policy addresses key issues.

There is a significant potential to increase digitization of the function

- ▶ 92% mobility professionals think digitizing processes is beneficial.
- ▶ Only 35% say their organization has digitized their key mobility processes.



The transformation of mobility programs can fuel a more sustainable future for organizations ...

- ▶ 93% of employees feel that an international experience can be life-changing.
- ▶ 90% employers believe aligning their mobility strategy to organizational objectives drives company growth.

78% of employers see a positive return on investment from their mobility program

Mobility creates life changing employee experiences, manages talent shortages and drives business growth

Grow your people

Grow your business

88%

employees are
open to future
cross-border mobility
opportunities

93%

employees feel that an
international experience
can be life-changing

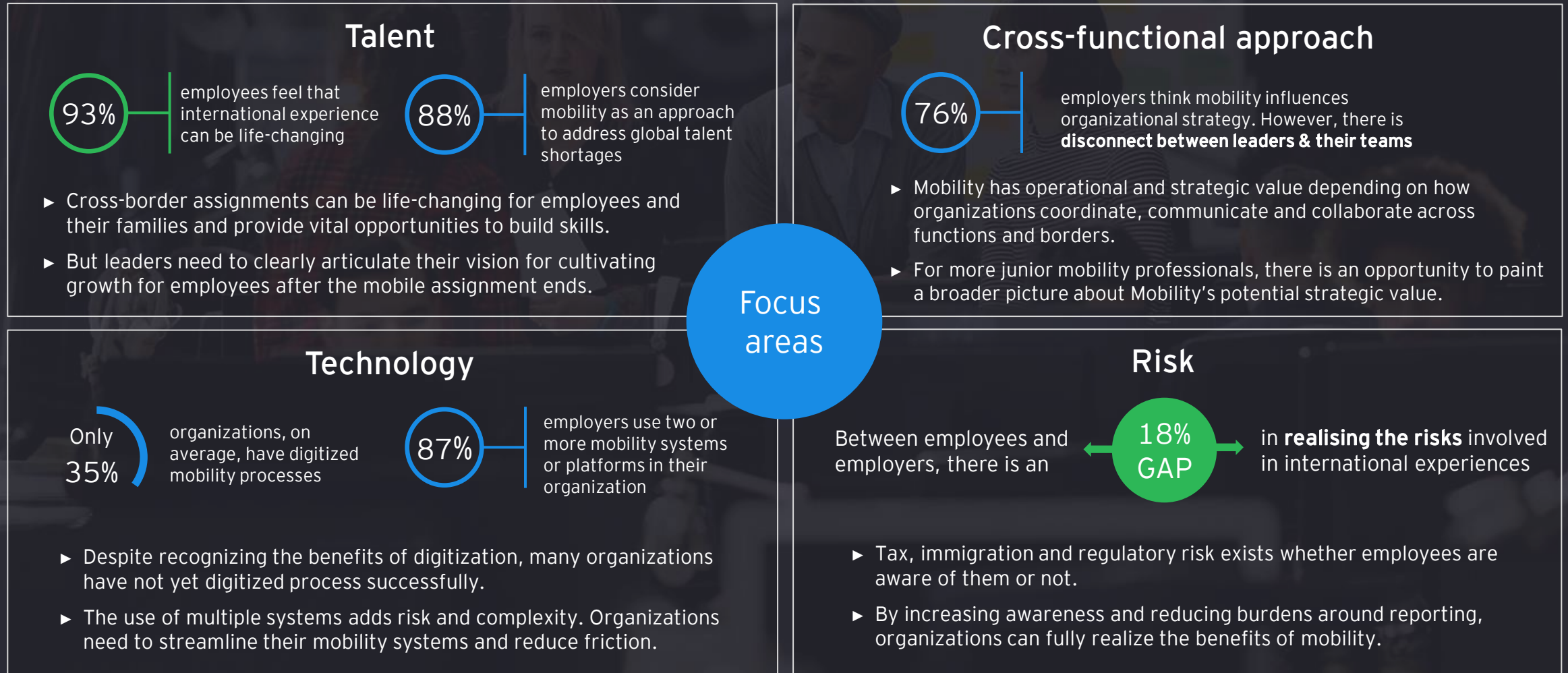
90%

employers believe aligning
their mobility strategy to
organizational objectives
drives company growth

78%

employers see a
positive return on
investment from their
mobility program

For workforce mobility to cultivate growth across borders, you need to focus on these areas





Strategic value

The mobility function is now a critical strategic lever for organizations

Mobility demand

93%

employees feel that an international experience can be life-changing

90%

employees will take up a short-term unaccompanied assignment to fill a short-term business need

Talent impact

88%

employers consider mobility as an approach to address global talent shortages

89%

employers think aligning mobility strategy to organizational objectives ensures employee safety

Strategic influence

76%

employers think that mobility influences their organizational strategy

74%

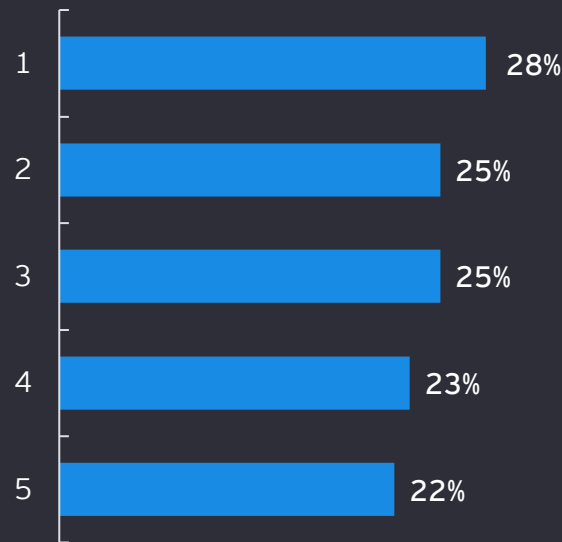
employers agree that the mobility function is critical to business continuity

Employees consider international experiences to be life-changing and pivotal to their learning and career growth

93%

employees feel that an international experience can be life-changing

Top five benefits from international experiences, according to all respondents



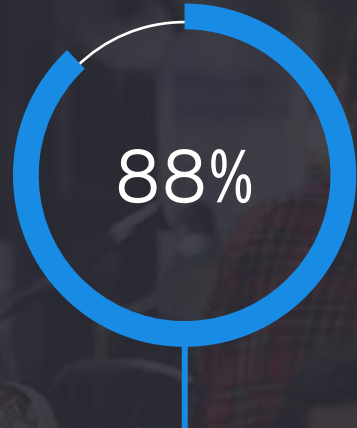
90%

employees will consider taking a short-term unaccompanied assignment to fill a short-term business need

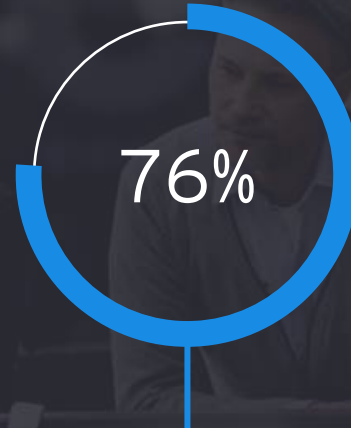
78%

employers see a positive return on investment from their mobility program

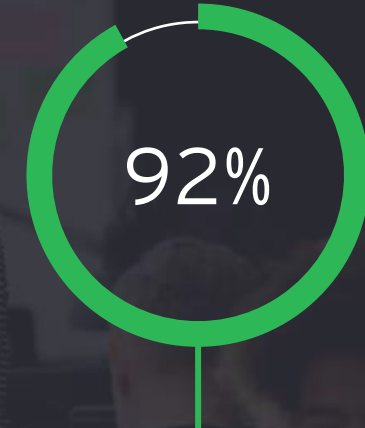
Employers recognize the importance of mobility in attracting and retaining top talent



employers consider mobility as an approach to address global talent shortages



employers consider talent attraction and retention among the top three priorities of their mobility program

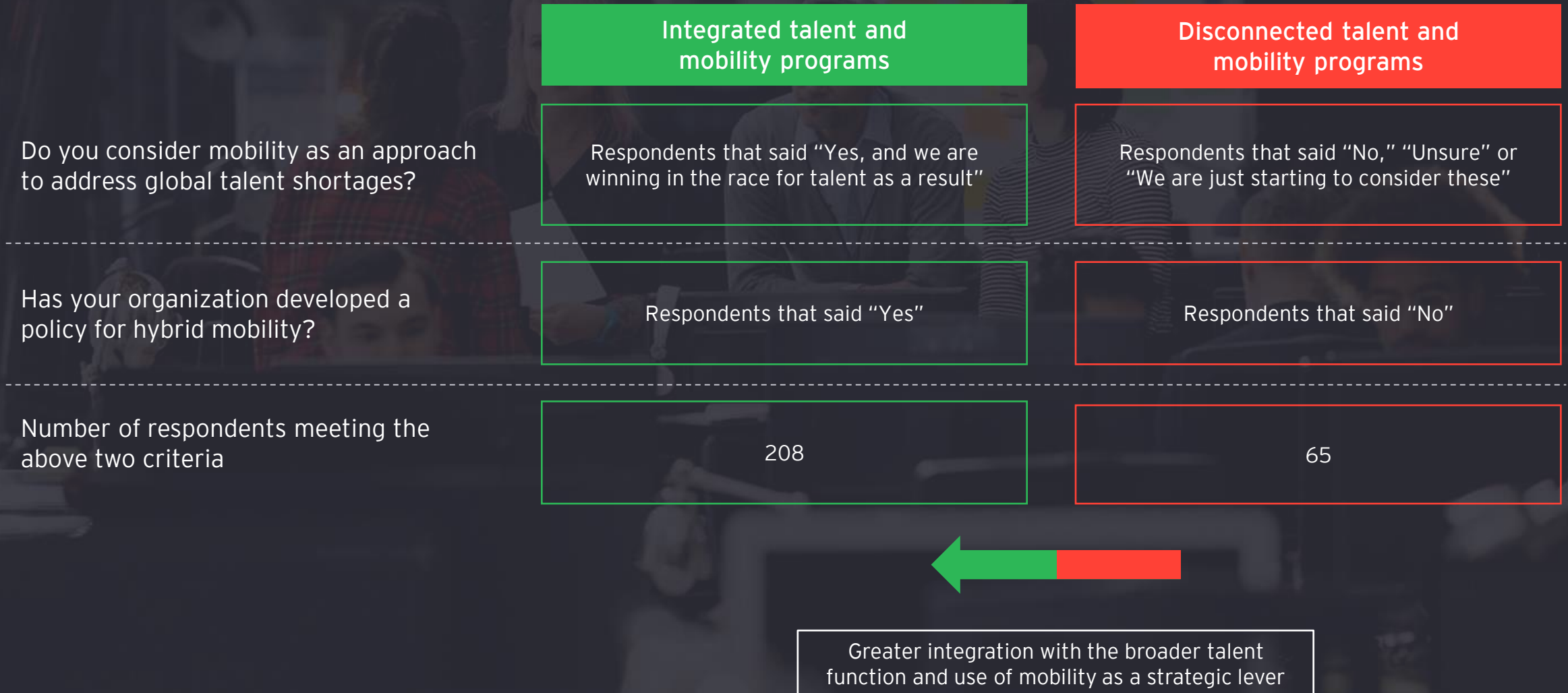


respondents believe that aligning mobility strategy to organizational objectives helps in attracting and retaining top talent



Talent impact

Integrated talent and mobility functions yield a positive impact on the organization's workforce plan



Integrated talent and mobility functions yield a positive impact on the organization's workforce plan

	Integrated talent and mobility programs	Disconnected talent and mobility programs
ROI on mobility program	91% get some or adequate return on their mobility program	Only 44% get some or adequate return on their mobility program
Mobility function reporting	For 44% of organizations, the mobility function reports to HR	11% of mobility functions report to HR
Scope of mobility in the next three years	42% expect an expanded scope of responsibilities	Only 9% expect an expanded scope of responsibilities
Extent of digitization	43% (on average) have digitized their mobility processes	On average, just 25% have digitized their mobility processes
Mobility technology investments over the next five years	83% plan to make moderate to substantial technology investments	Only 46% plan to make moderate to substantial technology investments

Mobility is now a strategic focus for many organizations, though inadequate coordination with other functions is a concern

Mobility as a strategic enabler

76%

mobility professionals said that the mobility function in their organization significantly influences business strategy and operations

74%

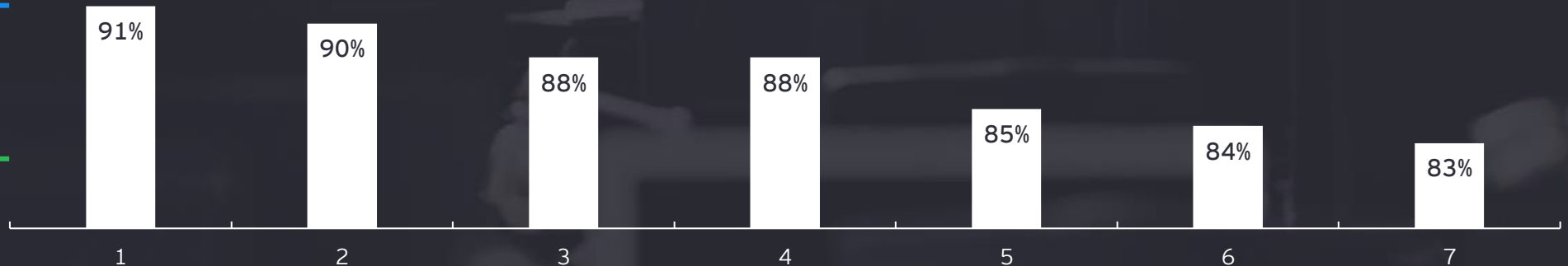
mobility professionals agree that the mobility function is critical to business continuity

60%

mobility professionals think that other organizational functions' limited visibility into the mobility function makes it difficult to achieve broader organizational objectives

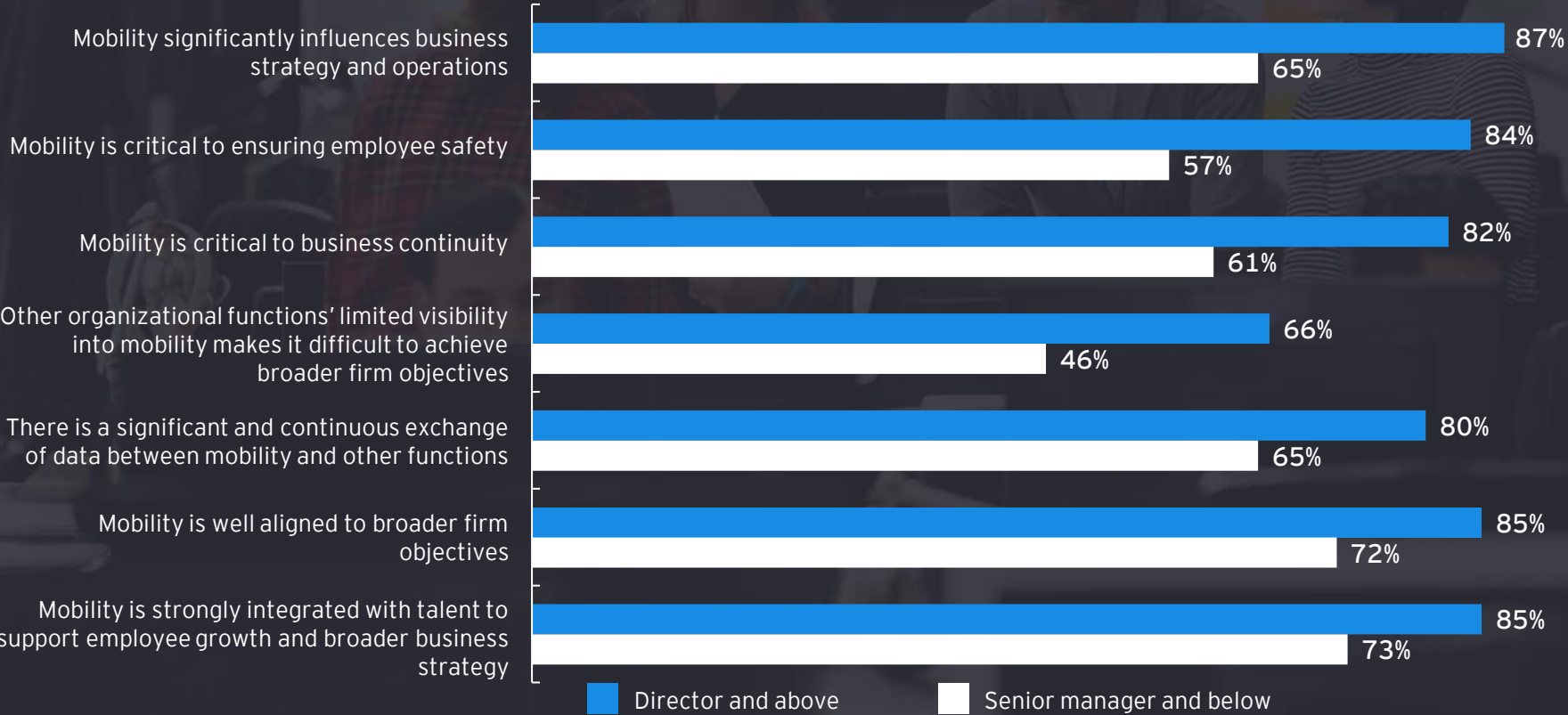
Key benefits from aligning mobility strategy to broader organizational objectives

Benefits from strategic alignment



Strategic focus: fewer senior mobility professionals are likely to recognize the strategic influence of mobility

Mobility professionals (%) who agree with the following statements

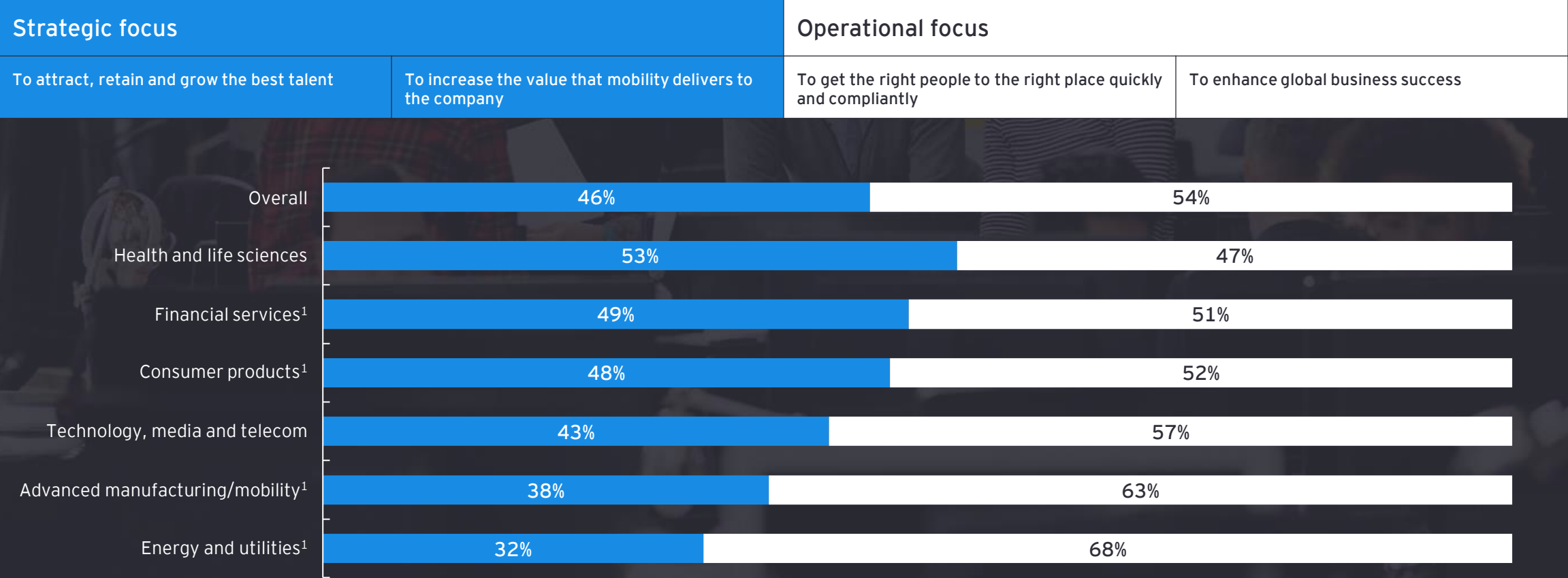


Mobility is much more likely to be viewed as a strategic function by more senior levels (director and above).

The disconnect in perception about mobility's strategic value between junior and senior professionals shows an opportunity to paint a broader picture about priorities around talent attraction and retention, learning and development, and business opportunity.

Strategic focus: some sectors use mobility more strategically, while others have a more operational focus

Which of the following statements best aligns to the strategic direction for your mobility program?



Note: 1. Financial Services includes the sectors 'Banking and Capital Markets,' 'Insurance' and 'Wealth and Asset Management'; Consumer Products includes the sectors 'Retail' and 'Consumer Products'; Energy and Utilities includes the sectors 'Oil and Gas' and 'Power and Utilities'; Advanced Manufacturing/Mobility includes automotive, aerospace & defence and manufacturing sectors

Strategic focus: TMT and consumer products organizations are most likely to realize mobility's strategic influence

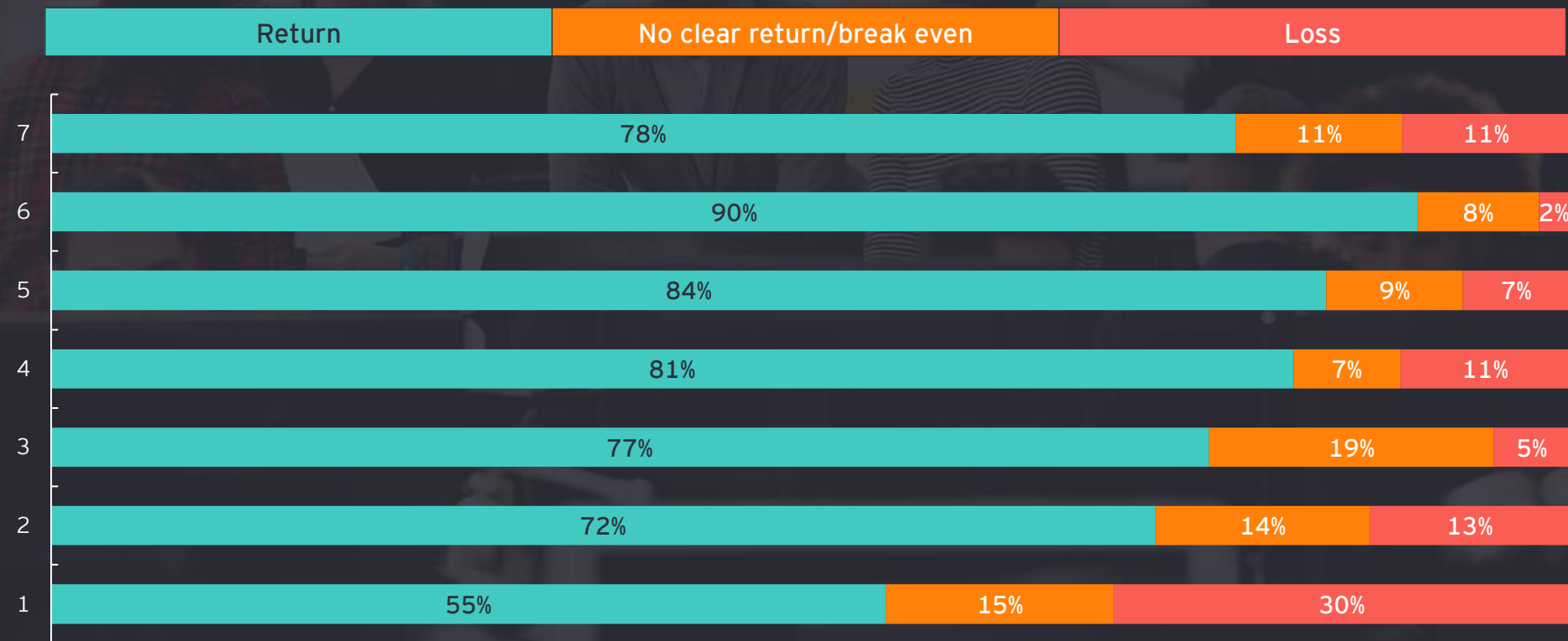
Employers (%) who agree or strongly agree that the global mobility function in their organization significantly influences business strategy and operations



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Return on investment: TMT organizations are most likely to say they get returns from their mobility investments

Employer rating: return on investment of their mobility program



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Return on investment: promotion post-assignment and performance ratings are the most popular ROI metrics across all industries

Which of the following ROI metrics do you report for your mobility program?

	Promotion post-assignment	Performance ratings	Cost	Retention	Impact to business
Overall	63%	68%	55%	45%	46%
Consumer Products ¹	45%	58%	74%	58%	43%
Financial Services ¹	51%	53%	71%	55%	44%
Health & Life Sciences	71%	62%	62%	33%	29%
TMT	63%	63%	52%	52%	58%
Advanced Manufacturing/Mobility ¹	72%	63%	49%	49%	42%
Energy & Utilities ¹	65%	60%	40%	35%	20%

Percent of employers reporting the ROI metric:



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Challenges and risks

Challenges and risks summarized: Employers face various risks to enable international experiences, which employees don't fully appreciate

The impact of this: compliance issues, poor employee experience, retention, etc?

Gaps in perceptions

Between employees and employers, there is an

18%
gap

in realizing the risks involved in international experiences

Result?

Poor employee experience and challenges in compliance and talent retention

Multifaceted risks

81%

employers on average think international experiences have cyber and data privacy risks

But only

29%

employers strongly agree that they can deal with geopolitical risks

Digitization

92%

employers on average think that digitizing the mobility function is beneficial

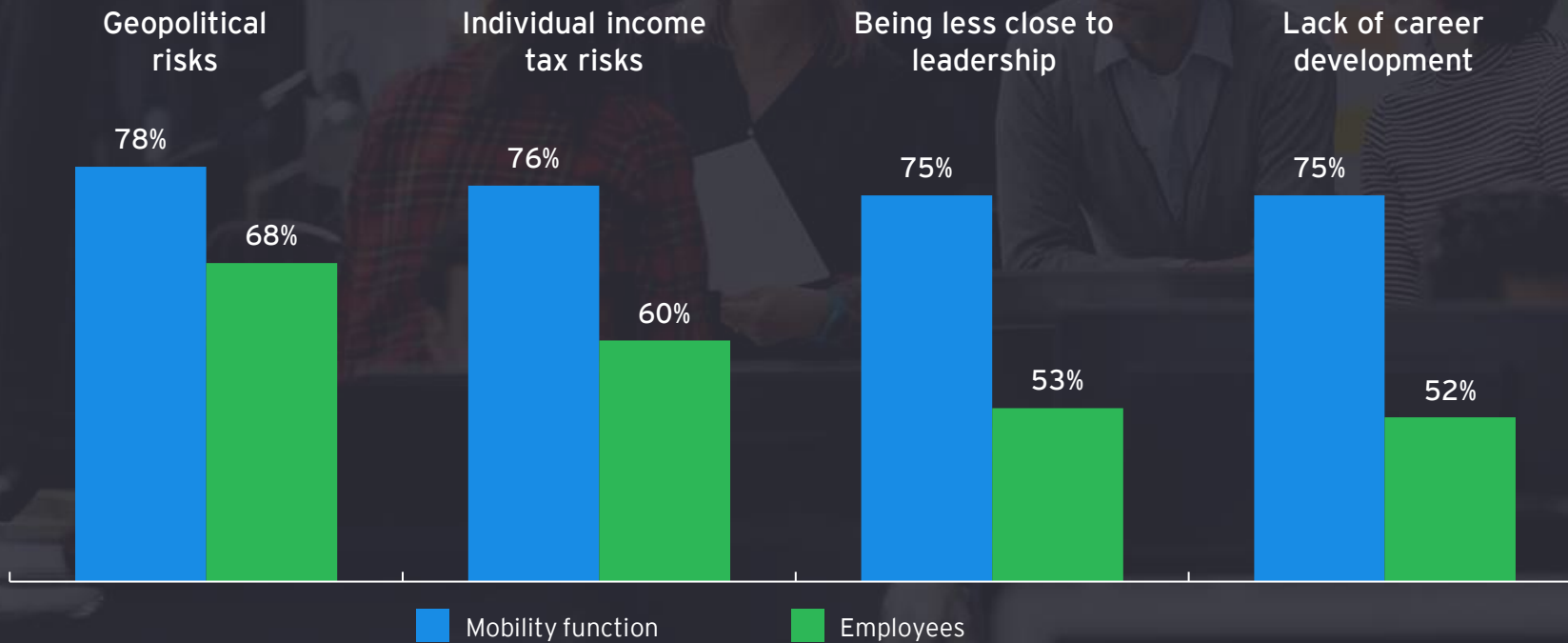
But only

35%

employers on average say that they have digitized their mobility processes

Employees may not fully appreciate the potential risks arising from cross-border movement

Respondents (%) who think that there is a moderate to significant risk in cross-border mobility due to the following factors



EY's 2022 Work Reimagined Survey also showed a perception gap between employers and employees on hybrid working.

In that survey, 72% of employers believe new ways of working will cause some workforce segments to lose competitive advantage, compared to just 56% of employees

Refer to [Slide 47](#) for geography-level trends

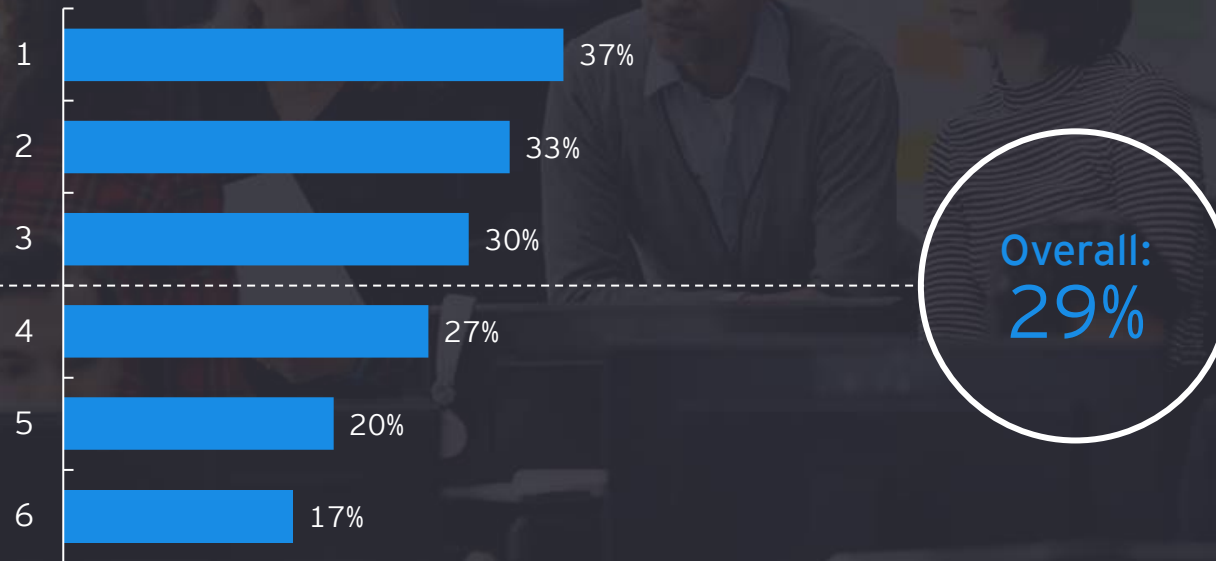
Employers highlighted a variety of risks involved in international experiences, including cyber, legal and regulatory risks

Employers (%) who pointed out the following risks of cross-border mobility



But is there a lack of preparedness among organizations to deal with the ensuing risks?

Respondents (%) who strongly agree that their organization is equipped to react to changing geopolitical circumstances



Only **49%** of businesses consistently track employee movements across domestic (i.e., state to state) and international jurisdictions

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Digitization

Despite recognizing the benefits from digitization, a majority of organizations are yet to automate and integrate their mobility processes

92%

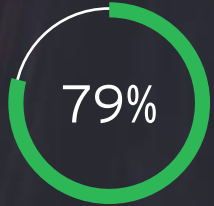
mobility professionals on average think that digitizing the mobility function is beneficial

but only

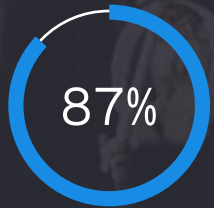
35%

on average say that their organization has digitized across a range of key mobility processes

Employees and mobility professionals are typically using multiple mobility systems/solutions

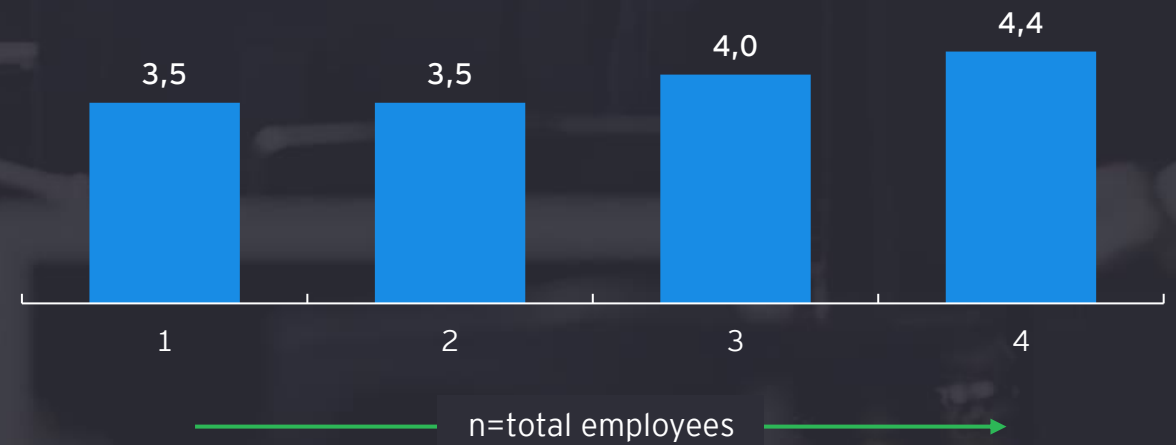


employees have used or currently use two or more mobility solutions for international relocation



mobility professionals use two or more mobility systems or platforms in their organization

Weighted average number of mobility technology systems/platforms currently used by organizations



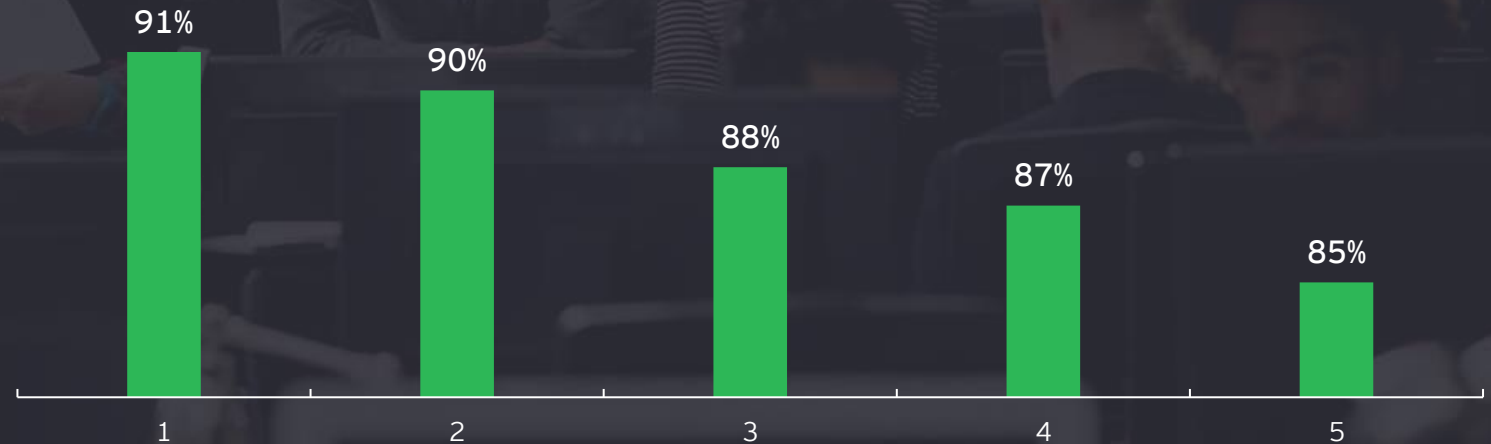
Expense management and rewards systems are viewed as most helpful by employees

Employees (%) rating the following mobility solutions as “somewhat helpful” or “very helpful”

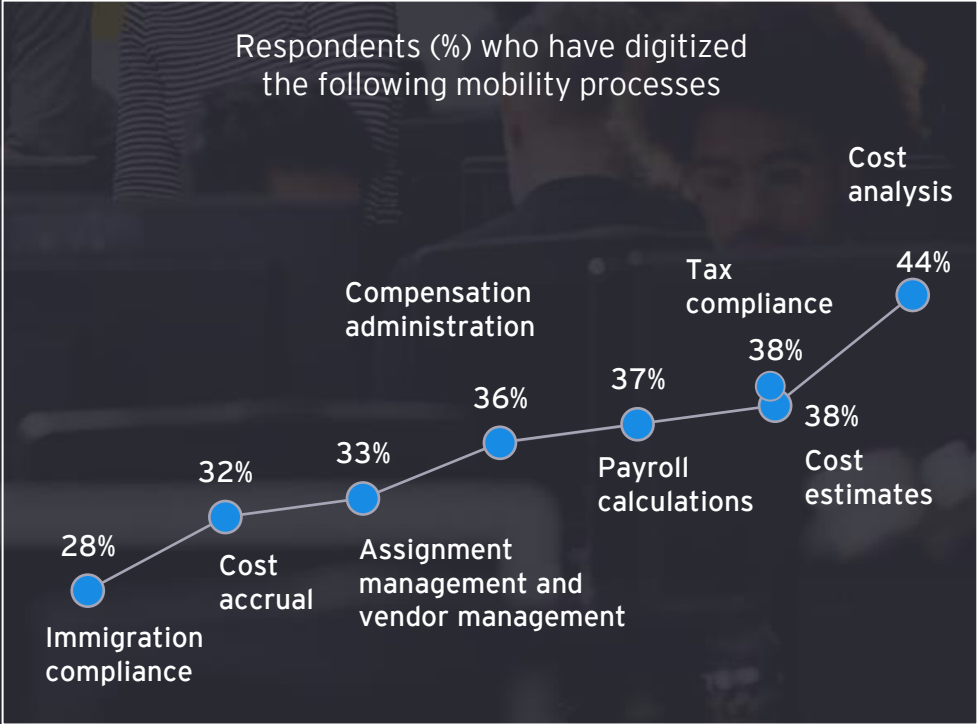
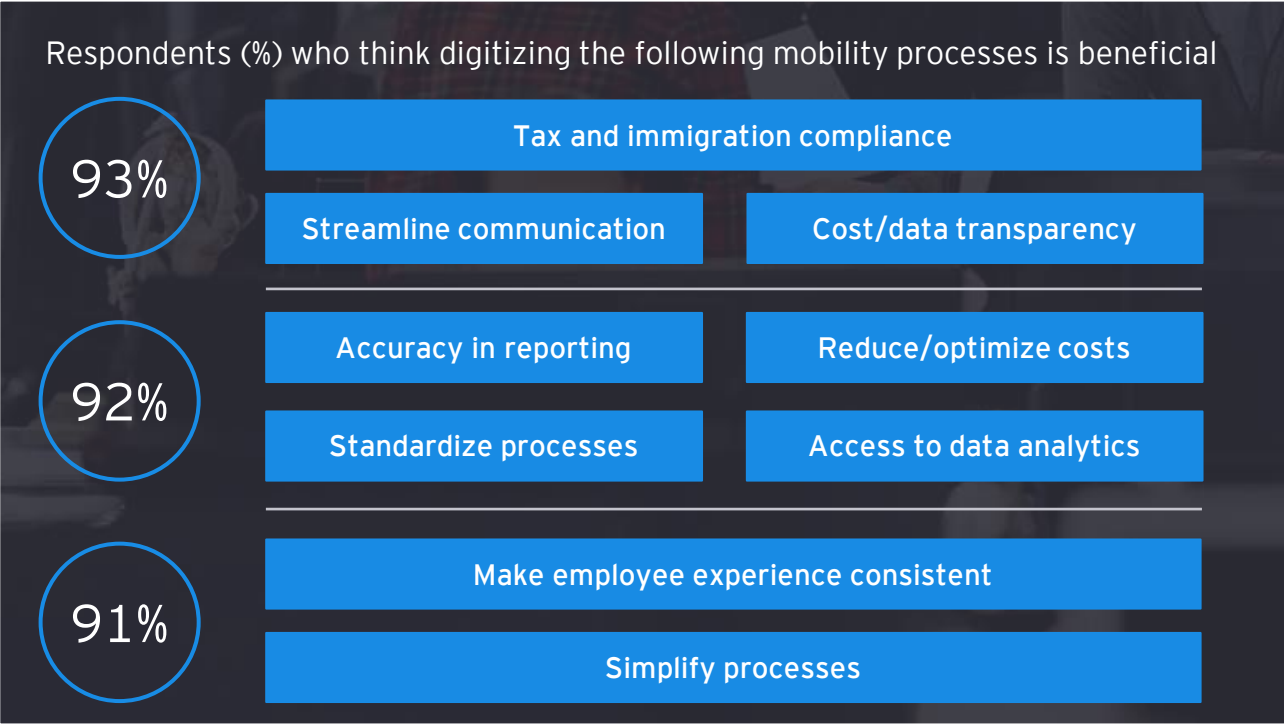
Mobility-leveraged systems

85%

or more employees find mobility-leveraged systems to be helpful



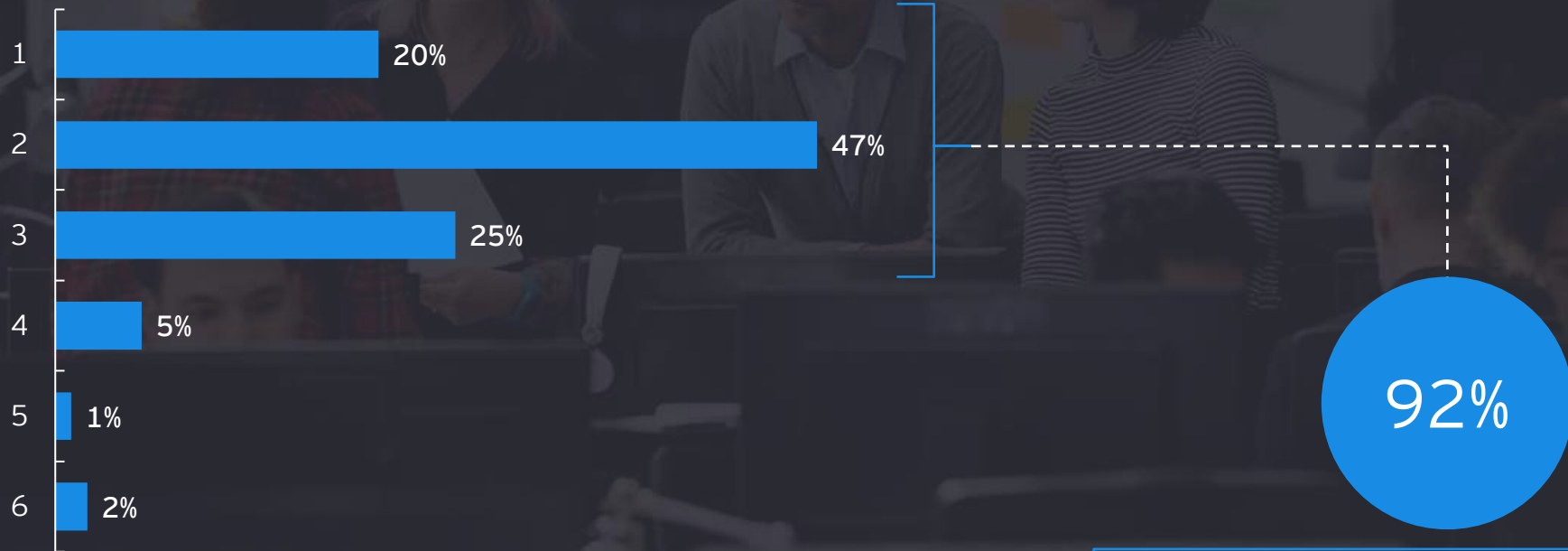
Despite recognizing the benefits from digitization, a majority of organizations are yet to automate and integrate their mobility processes



To get to where they want to be, employers will need investment and transformation. In order to succeed and minimize the risks from such change, EY research shows organizations must put Humans@Center of their transformation journey. See slides 50 and 51 for more.

However, mobility professionals expect an increase in investment in the near future

How does your organization plan to change the investment in mobility technology and digitization over the next five years?



mobility professionals expect their organization to sustain or increase their investment in mobility technology and digitization over the next five years



Hybrid mobility

Hybrid mobility* has seen widespread adoption

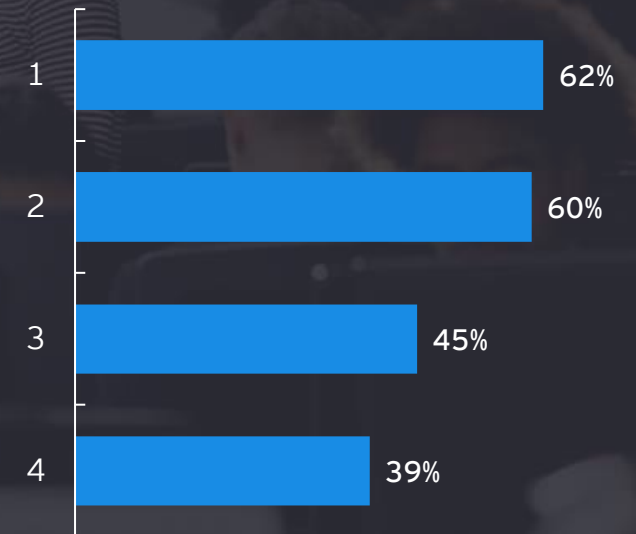
76%

organizations have developed some form of policy or approach for hybrid mobility

60%

or more organizations have implemented international virtual assignments and employee-driven temporary cross-border remote working

What type of policies have been implemented for hybrid mobility?



**e.g., temporary and permanent remote work, hybrid cross border work, virtual assignments, global nomads*

The EY 2022 Work Reimagined Survey showed how employers are increasingly adopting hybrid mobility policies. In that survey, 72% of employers were considering or have implemented a policy to work from another location on a temporary basis. Seventy-four percent said they were prepared to hire employees with hard-to-fill or critical skills from any geography and allow them to work from anywhere.

Financial services and technology, media and telecom organizations are most likely to have developed hybrid mobility* policies

Organizations (%) across industries that have developed some form of policy or approach for hybrid mobility

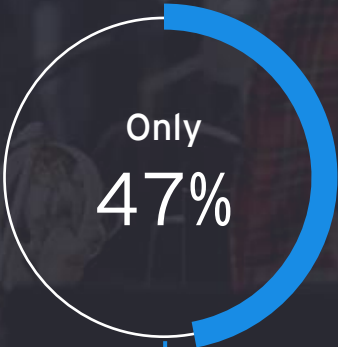
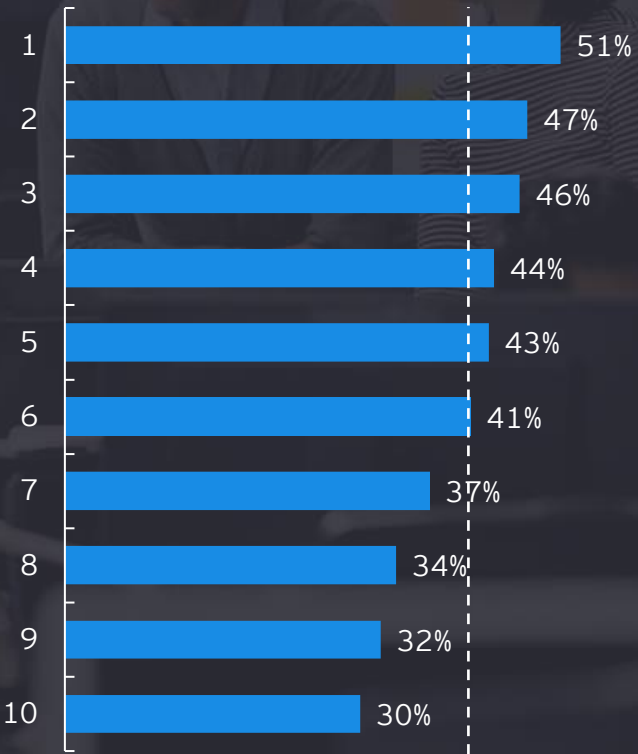


**e.g., temporary and permanent remote work, hybrid cross border work, virtual assignments, global nomads*

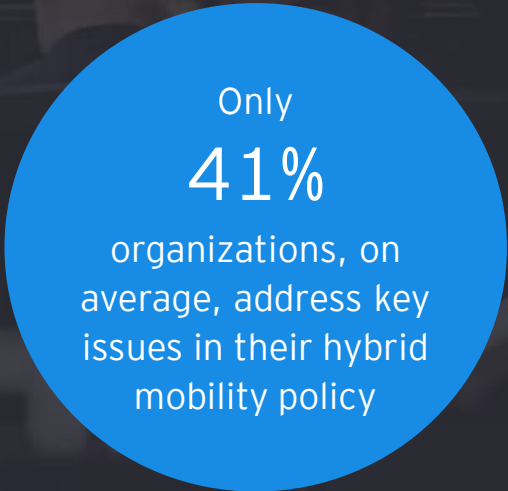
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Yet, most organizations have less-developed plans to manage the risks involved

Respondents (%) who think that their organization's hybrid mobility policy addresses the following aspects



organizations have a globally consistent policy for hybrid mobility*



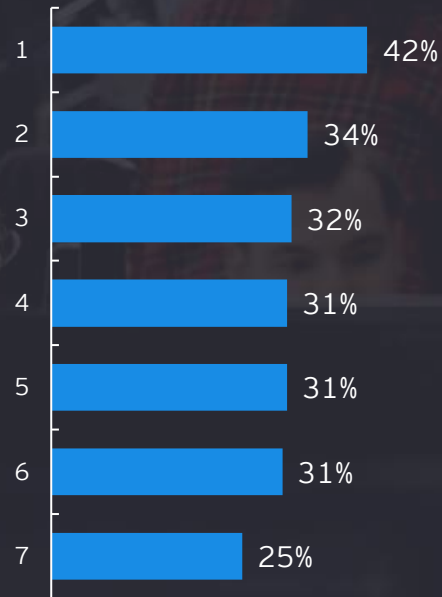
*e.g., temporary and permanent remote work, hybrid cross border work, virtual assignments, global nomads



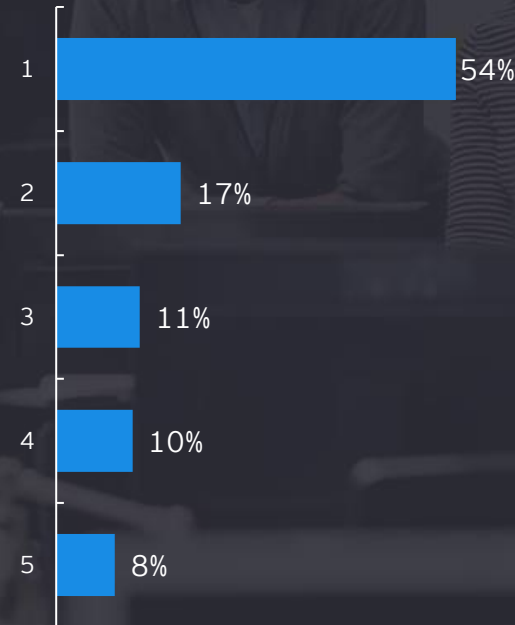
Operating model

Mobility functions in most organizations are closely aligned and connected with the HR function

Operating model of the mobility function



Who the mobility function reports in to

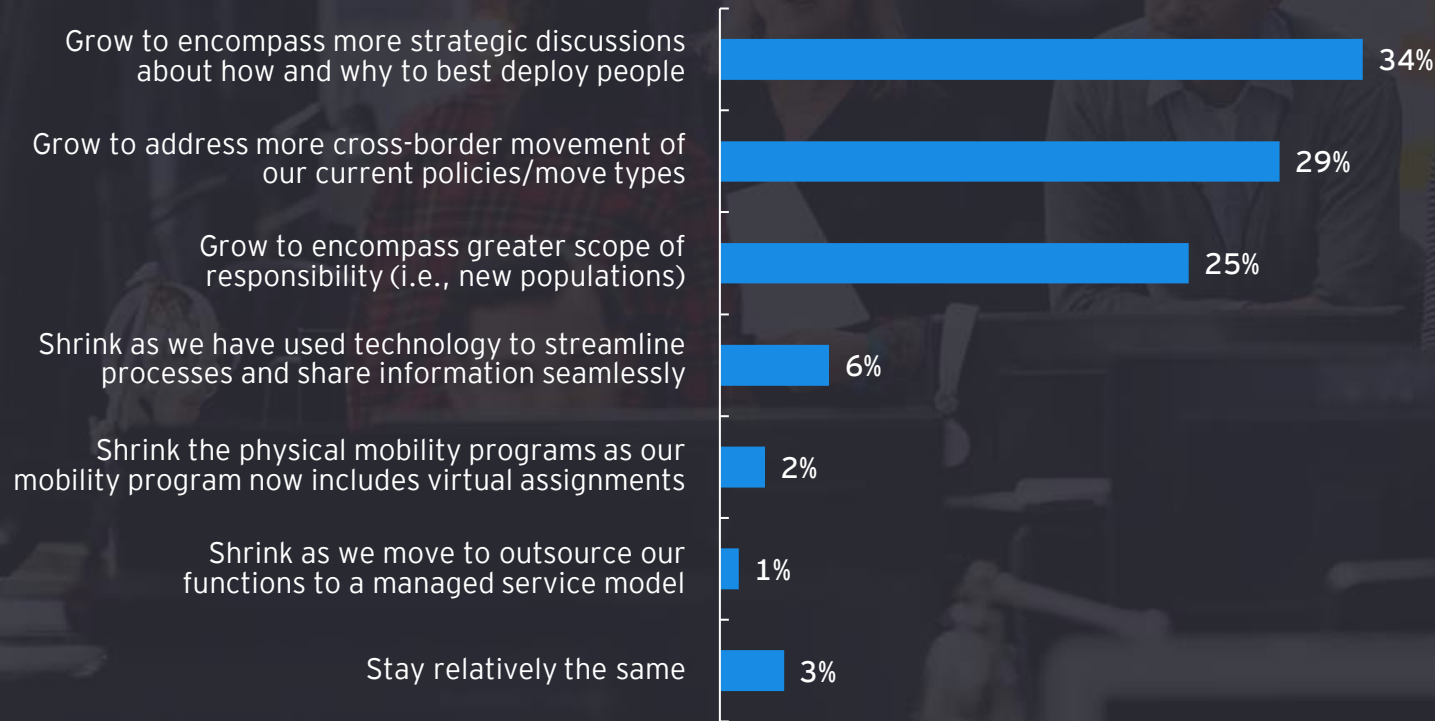


Who the mobility function collaborates with



Over the next few years, mobility is expected to have an expanded role in organizations, with a key role in talent development and attraction

How the scope of mobility will change over the next three years (select all that apply)

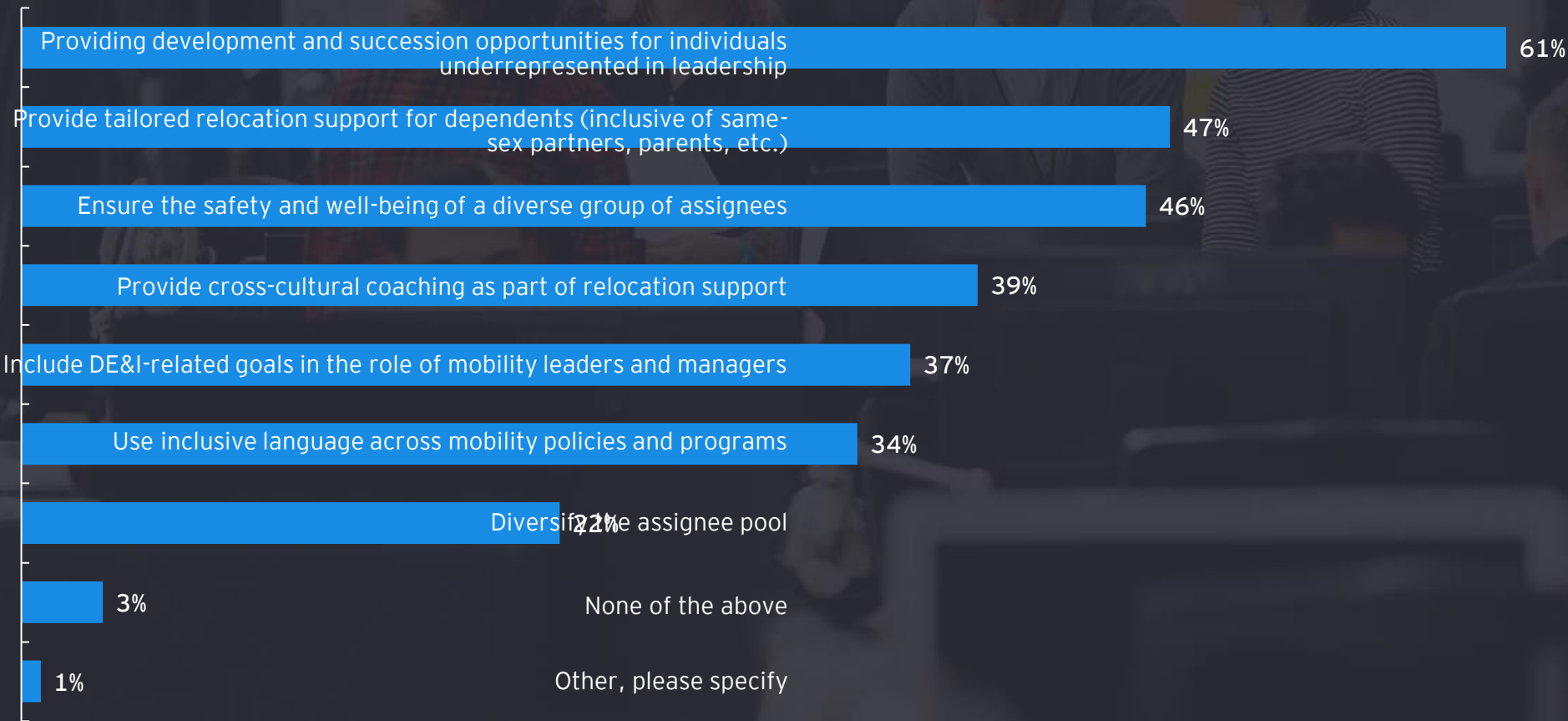


87%

of mobility professionals believe the scope of mobility in their organization will increase over the next three years

Diversity, equity and inclusion (DE&I): Mobility is viewed as pivotal to driving organizations' DE&I-related goals

Top ways in which mobility drives DE&I-related goals



Skills of the mobility function: Cybersecurity, business growth and employee experience are the top-rated skills

Skills and capabilities rated as very important for the mobility function in the future





Employee experience

While nearly all employees (93%) believe an international experience to be potentially life-changing, they also appear to be largely happy about the support provided by their employers

88%

employees said that the quality and level of international move experience support provided by their employers meets or exceeds their expectations

Employees (%) who agree their employers have the right mix of:

85%

flexible work, including work from home and flexible start/finish times

78%

Part-time vs. full-time

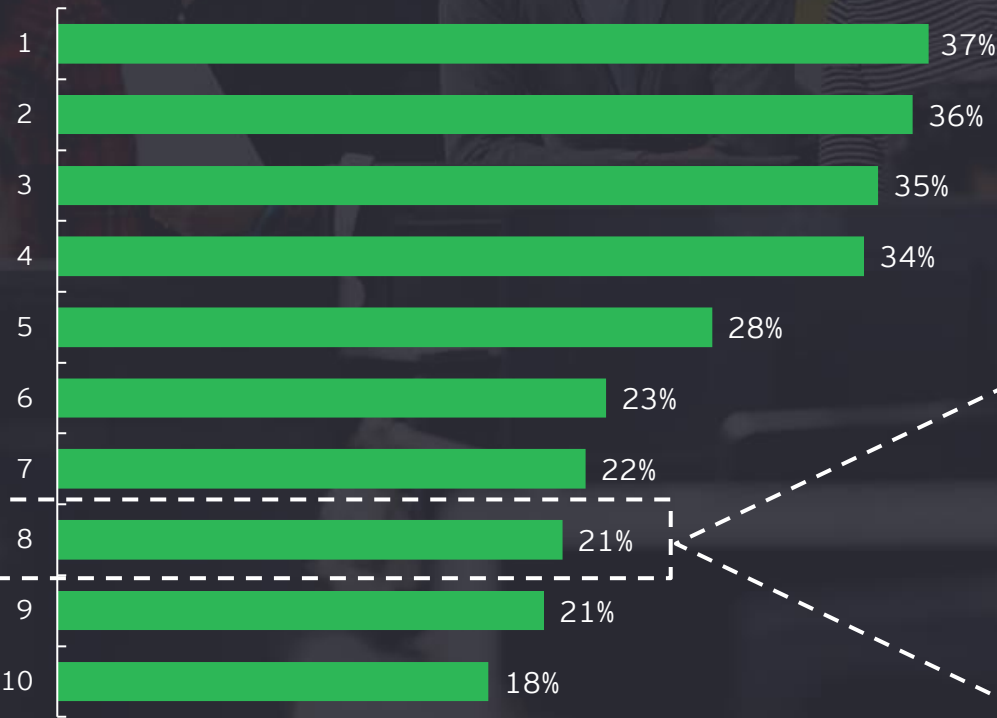
74%

Employment options

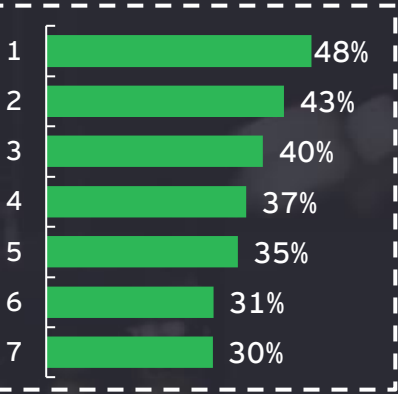
In terms of relocation support, compensation, housing, and health and safety are top of the mind for employees

Despite the impact of non-monetary benefits on employee experience, cash compensation still tops the list of most important relocation aspects for employees

Various aspects of relocation support ranked in terms of importance by employees



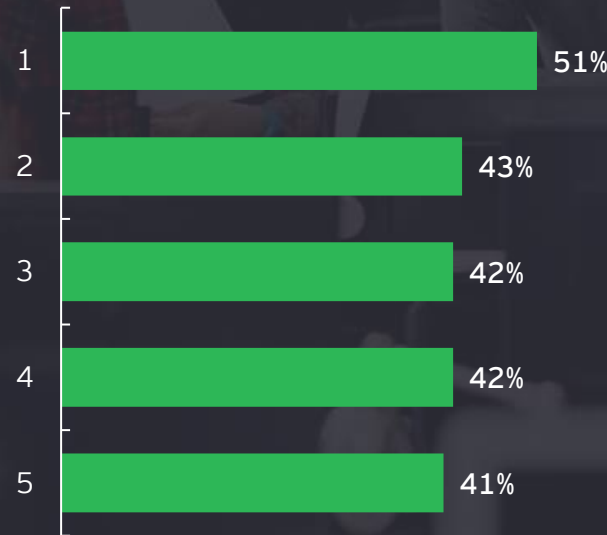
In terms of tailoring benefits for themselves, housing, health insurance and compensation are favoured most by employees



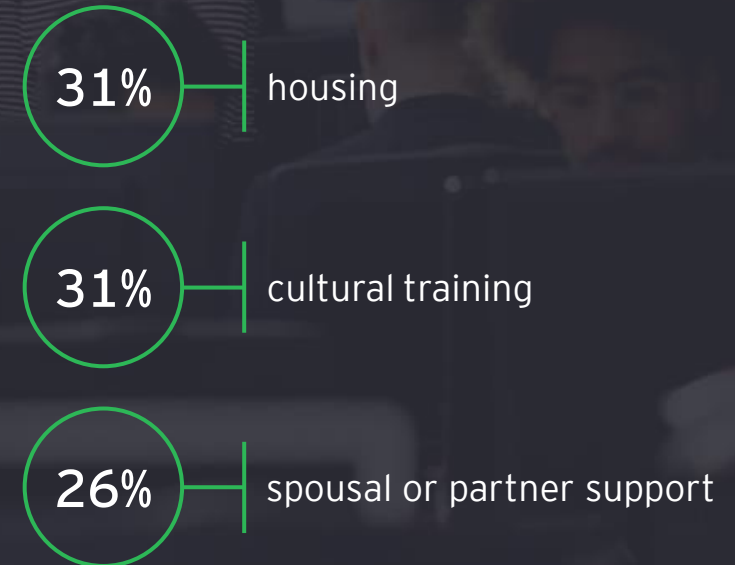
Getting appropriate support for families is pivotal in shaping the employee's international experience

In relocating, family experience tops the list of most influential factors for the family's international experience

Top three influential factors to relocate the family for an international experience



Most helpful resources for families in support of an international experience





Appendix

Survey demographics: Most employer respondents work in the US and the tech, media and telecom industry

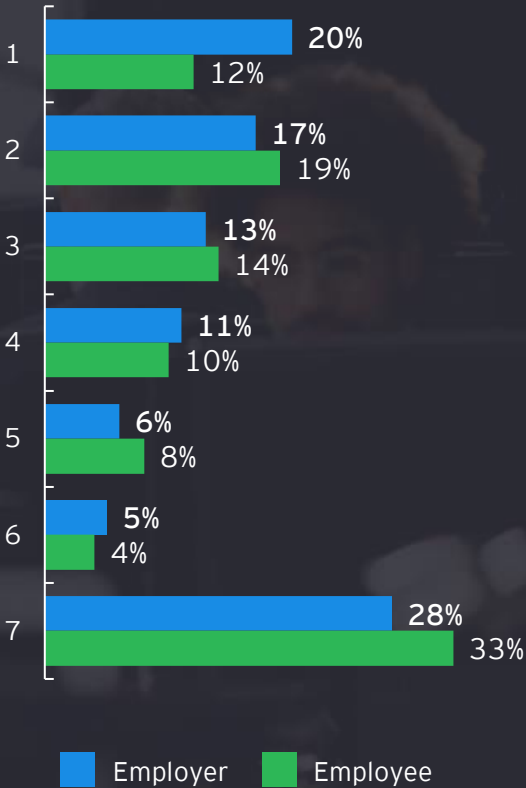
1,026 responses logged,
51% employees and
49% employers

Org size by employee count	Employer	Employee
500 to 999	23%	20%
1,000 to 4,999	41%	41%
5,000 to 14,999	19%	22%
15,000 or more	17%	17%

16 regions covered, with most respondents working in the US (37%)

Primary place of work	Employer	Employee
Australia	16	16
Belgium	15	16
Brazil	10	11
Canada	25	26
China	27	27
France	15	16
Germany	40	42
India	15	16
Japan	10	10
Mexico	10	11
Netherlands	15	15
Poland	10	11
Saudi Arabia	10	11
Switzerland	21	21
United Kingdom	53	54
United States	189	191
Other, please specify	25	26

27 industries represented, with most employers coming from tech, media and telecom (20%)




Note: 1. Financial Services includes the sectors 'Banking and Capital Markets,' 'Insurance' and 'Wealth and Asset Management'; Consumer Products includes the sectors 'Retail' and 'Consumer Products'; Energy and Utilities includes the sectors 'Oil and Gas' and 'Power and Utilities'; Advanced Manufacturing/Mobility includes automotive, aerospace & defence and manufacturing sectors

Employees may not fully appreciate the potential risks involved with cross-border movement

Respondents across geographies¹ who think that there is a moderate to significant risk in cross-border mobility due to the following factors

Geography	Type of risk	Mobility function	Employee
Americas	Geopolitical risks	79%	69%
	Individual income tax risks	78%	65%
	Being less close to leadership	76%	55%
	Lack of career development	75%	56%
EMEIA	Geopolitical risks	76%	69%
	Individual income tax risks	79%	59%
	Being less close to leadership	77%	50%
	Lack of career development	78%	50%
Asia-Pacific	Geopolitical risks	85%	62%
	Individual income tax risks	58%	42%
	Being less close to leadership	75%	47%
	Lack of career development	70%	38%



EY | Building a better working world

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