For the past seven years, EY’s Global Mobility Effectiveness Survey series has demonstrated how companies that take a strategic approach to mobilizing their talent in our increasingly globalized economy reap financial rewards. Now, EY has collaborated with Harvard Business Review Analytic Services to examine more closely who the leading mobility “strategists” are, the marked differences in approach they take from “reactors,” and the involvement of top management in supporting organizational goals.

This study, conducted by Harvard Business Review Analytic Services with extensive input and analysis by EY Human Capital professionals, clearly finds that companies are looking for more flexible mobility structures for their talent to drive new market growth, fill skill gaps, complete mergers and acquisitions, and give future leaders international experience.

Meeting this demand is not easy, in large part because the world is becoming more complicated. Governments are increasingly requiring that companies comply with often onerous regulations affecting cross-border payroll, tax filings, Social Security, and immigration. In addition, recent intergovernmental initiatives such as the Base Erosion and Profit Shifting (BEPS) project by the Organisation for Economic Co-operation and Development (OECD) mean what employees are doing, and where, may eventually influence broader tax issues such as transfer pricing. As a result, the definition of mobility has been expanded beyond traditional expatriates to include any cross-border movement, including commuters and business travelers.

It clearly appears that leading strategists enjoy a positive financial return. However, the complex environment can make it difficult to easily identify with them if one relies on more conventional business metrics when making a comparison. Big data and data analytics are beginning to help drive new, informed decision-making in mobility and make those returns more evident. The current and increasing ability to use data analytics to bring new insights to mobility programs, and importantly, the C-suite, is changing some of the approaches and decisions within leading mobility programs. This actionable insight is helping companies forge better decisions regarding cost management, reducing loss of talent after repatriation, policy development, and global workforce planning.

The additional compliance demands linked with the new opportunities being brought by advanced data analytics mean that companies have to be more forward-thinking if they want to properly meet current and future challenges and opportunities. It is clear that strategists will have a better chance of success. The question moving forward is whether reactors will react faster or risk falling behind.

Ultimately, talented people will help us all build a better working world. Our mission is to help businesses deploy their talent effectively. We are proud to have worked with Harvard Business Review Analytic Services on this project, and hope you find the survey results and insights useful.
EXECUTIVE SUMMARY

As three trends—complexity, speed to market, and global reach—converge, the need for competent managers to take on cross-border assignments grows.

This is where global mobility fits in. Effective global mobility strategy and execution—or strategic global mobility—can be a key tenet of organizational effectiveness and performance management. By tying global mobility strategy to other metrics, best-in-class organizations have reported their global mobility programs have been critical to supporting new business growth, improving financial performance, bolstering employee engagement, succession planning, retaining and developing top talent, and increasing diversity.

These are among the findings of a new Harvard Business Review Analytic Services survey, sponsored by Ernst & Young, of 695 executives around global mobility—research that features in-depth interviews with eleven best-practice company leaders. Ninety percent of respondents are managers/executives in global companies, with more than two-thirds (69 percent) representing organizations with operations in more than ten countries.

The research found that despite the tangible benefits of getting it right, global mobility remains a low priority on the list of strategic imperatives. It is, among most organizations’ business priorities, not a principal area of focus. In fact, many organizations today still do not have a mobility strategy in place. Forty-three percent of respondents indicated their companies did not have such a strategy and instead handled mobility needs reactively or on an as-needed basis, which was cited as the primary barrier to global mobility’s success.

For the purposes of this study, respondents who said they handled mobility this way are called “reactors”; respondents who said their organizations used global mobility as an integral part of how they grow their business and develop their people are called “strategists.” The study showed marked differences in attitudes, practices, and outcomes among global mobility reactors versus strategists.
Top challenges of global mobility deployment for both strategists and reactors include the high expense of relocation, the fact that it is difficult to quantify the return on investment (ROI) of mobility, skills gaps created by moving a talented manager elsewhere, and a lack of ownership of mobility among senior executives. Paperwork and compliance issues were cited as significant barriers too.

Despite these challenges, the survey results indicated that the tides are turning on mobility, and that there is an increasing need to move global mobility up the list of talent management priorities and to make mobility decisions more strategically and with a longer-term focus. Respondents said that over the past two to three years, the need for global mobility has increased (63 percent), and they anticipate even more demand over the next two to three years (72 percent). So as the imperative for new market growth grows, and more and more high-potential managers are seeking challenging assignments, the demand for a more robust global mobility program grows with it.

This study offers a clear picture of mobility’s place in most organizations—and where it is going. It demonstrates there is a direct link between thoughtful, well-planned global mobility strategy and high performance, even when mobility serves as an underpinning to financial success. It illustrates how leading companies are assessing the ROI of global mobility, even though few report having a holistic measurement in place to do so. Exploring current barriers to optimal mobility strategy, the report offers best practices on how to overcome them. Finally, it makes the case that leaders need to focus more on this issue and that global mobility deserves more attention from C-level executives.
STRATEGISTS VS. REACTORS

The study revealed a dichotomy between those who are more proactive and forward-thinking in their approach to global mobility—the strategists—and those who tended to turn to global mobility only when there was a need—the reactors. Roughly one-quarter of respondents fell into the strategists category. Figure 1

There were marked differences in attitudes, approaches, and practices between strategists and reactors. Overall, while reactors are evenly distributed across global regions, industries, and organization sizes, strategists tend to come from the largest companies. This would suggest that there may be a link between company size and approach to global mobility decision-making. While approximately one-third (36 percent) of organizations said they currently have a formal global mobility strategy in place, many more strategists (62 percent) said their organizations do. And strategists have a better sense of the value of having a global mobility strategy—almost two-thirds of strategists (65 percent) say that global mobility has had an impact on their organization’s financial performance. Fewer than half of reactors (49 percent) agree, with a full 40 percent saying that mobility has had no financial impact.

WHO LEADS GLOBAL MOBILITY?

In more than half of companies, it is either a senior-level human resources executive (27 percent) or chief human resources officer (25 percent) taking the lead with global mobility oversight. Strategists are more likely (29 percent) to have a global mobility director driving strategy, rather than operations, versus reactors. Other positions identified for leading global mobility strategy were division heads (24 percent), CFOs/finance heads (7 percent), or heads of talent (6 percent). Interestingly, 18 percent of respondents said they “didn’t know” who led global mobility strategy, which speaks to the lack of attention global mobility receives in a number of organizations.

FIGURE 1

HOW MOBILITY DECISIONS ARE MADE

Please characterize which best describes how mobility decisions are typically made in your organization.

26% PROACTIVELY
Mobility is mapped out and used strategically to help develop future leaders

63% REACTIVELY
When there is a need (e.g., we’re growing a unit and need a manager to run it now)

11% DON’T KNOW

BASE: ALL RESPONDING FROM HBR SOURCES N=389
Another key difference between strategists and reactors in the survey was the frequency and nature of discussions about global mobility with C-suite executives. Figure 2 Nearly half of strategist organizations (47 percent) said discussions with the C-suite happened quarterly or more frequently (monthly and weekly). Reactors were far more likely to say that C-level executives discussed global mobility on an ad hoc/as-needed basis (29 percent) than were strategists (10 percent).

The nature of these discussions differed greatly too. Reactor organizations take an unstructured approach to global mobility. Meetings with C-level executives are largely about obtaining approval to fill an immediate need; they are not about planning ahead. Strategist organizations have entirely different conversations in which top executives are playing an active role in global mobility implementation to support broader organizational goals like talent management and succession planning.

A human resources director from the Indian subsidiary of a global packaging and specialty chemicals company describes how their top executives get involved: “Global mobility decisions are frequently discussed among C-level executives. The active assignee population is always reviewed as part of our internal organizational review process, an ongoing process of assessing employees’ suitability for long-term career growth opportunities. Likewise, the organizational review process can target individuals whose career progression indicates a need for a transfer or foreign assignment as a development opportunity. Intra-country or country-to-country permanent moves are approved by the respective business leadership. All foreign assignments require EVP and SVP-Human Resources’ approval.”

This is the process for a global mobility operations manager of a large U.K.-based telecommunications services company: “Senior management would get involved in the selection of the candidate mostly for other executives’ roles. Nevertheless, all assignments’ cost estimates are finally approved by the senior management, providing there is a solid business case.”

The head of international assignments for a European-based building products manufacturer explains their process: “In our company, we have a profound succession planning process, which is discussed regularly among C-level executives. Global mobility falls directly under this. We use a radar to identify talents, with pools on each level: global, zone level, and then local level. To fill the succession pipeline, we use assessment tools throughout the year; it’s a long-term process. At least once a year, there’s a performance review and a development review midyear. C-level
executives own the talent lists and have a big interest in driving them. Those lists are transparent: People know if they are identified as high potentials, because we work together with them to develop a career plan. They might say, ‘I’d really like to be a CFO in Asia,’ for example. He or she knows that this is the plan, and we look for those opportunities for them. It’s fair to say that having an overseas assignment is a huge criteria for rising to senior management here.”

At a global environmental and industrial products company, “Mobility needs are a line decision. Any expatriate position needs to be approved by the head of global mobility, which is CEO ‘minus-one’ level. The recruitment process is typically started four to six months before the assignment

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**FIGURE 2**

**FREQUENCY OF C-LEVEL GLOBAL MOBILITY DISCUSSIONS OVER THE PAST YEAR**

Over the past year, how frequently is global mobility brought up to C-level executives for discussion?

- **Weekly**: 7%
- **Monthly**: 6%
- **Quarterly**: 19%
- **Semiannually**: 12%
- **Annually or less frequently**: 29%
- **Ad hoc/as needed**: 10%
- **Never**: 2%

*BASE: ALL RESPONDING FROM HBR AND EY SOURCES N=695*
starts. The metrics are based on performance. I have not experienced employees who have been disqualified for an expat position for other reasons than there being a better-suited candidate,” says their head of operations for Latin America.

A global mobility manager from a U.S. global agriculture products company explains the tie to talent management: “Mobility decisions are made at the business unit and platform levels between the HR leaders and the business leaders. Sometimes the greater good requires top management to mandate a particular assignment to a business where the margins are not there but the assignee is a 7, 8, or 9 in the talent box. Note, almost all of our senior leaders have had an international assignment and it is encouraged as part of our talent strategy.”

**BARRIERS TO GLOBAL MOBILITY IMPLEMENTATION**

Many organizations struggle with barriers to effective global mobility implementation. The survey revealed a number of barriers that stand in the way of optimal global mobility planning and implementation. Figure 3

The biggest obstacle, not surprisingly, was the tactical, ad hoc, reactive approach to global mobility and organizations’ failure to prioritize it as an important way to support business goals. An HR manager from a U.S.-based global pharmaceutical company lamented, “There is a lack of knowledge within the business—they simply want it done fast and cheap and it doesn’t work either way. Generally, the managers make the decision before [the] Global Mobility [department] is even involved.” That said, they are trying to change this, and C-level executives “do meet quarterly and are given detailed reports.” For her company, global mobility is a work in progress.

Other challenges that both reactors and strategists cited included the significantly higher cost of relocation compared to hiring local staff, the skills gap left by the vacated assignee, hard-to-quantify ROI, a lack of ownership, and insufficient structure in place to ensure a successful outcome. Reactors were far more likely to cite a lack of ownership (27 percent vs. 12 percent) and insufficient structure (22 percent vs. 11 percent) than were strategists.

For a leading North American packaging and specialty chemicals company, the largest barriers are “Family considerations affecting one’s ability to be mobile (spousal employment, schooling, elder care); country-specific compliance concerns (immigration, tax, etc.); and relocation/assignment costs,” says a human resources director.

Meanwhile, the global mobility operations manager of a telecommunications services company asserts that their biggest barriers are “the high costs associated, mainly derived from taxes, Social Security, and managing compliance, which given the different assignments and arrangements might increase the complexity.”
FIGURE 3

TOP FIVE CHALLENGES WITH GLOBAL MOBILITY STRATEGY IMPLEMENTATION

Which of the following are the most significant challenges your company faces when trying to implement a global mobility strategy?

- **Too ad hoc**: 35%
- **Relocation too expensive compared to hiring local staff**: 27%
- **Moving person would leave skills gap**: 23%
- **ROI too expensive/hard to quantify**: 22%
- **Lack of ownership**: 22%

BASE: ALL RESPONDING FROM HBR AND EY SOURCES N=695

FIGURE 4

GLOBAL MOBILITY ROI NOT WIDELY MEASURED

Do you currently measure the return on investment (ROI) of global mobility?

- **Yes**: 18%  
  - Reactor: 7%  
  - Strategist: 11%
- **No**: 43%  
  - Reactor: 14%  
  - Strategist: 25%
- **Not yet, plan to in 12-18 months**: 21%
- **Don’t know**: 7%

BASE: ALL RESPONDING FROM HBR AND EY SOURCES N=695
GLOBAL MOBILITY: TOP BUSINESS METRICS USED

Which of the following metrics, if any, is your organization using to evaluate the impact of global mobility on your business performance?

- **Competency/skills levels**
  - **REACTOR**: 25%
  - **STRATEGIST**: 41%

- **Employee engagement**
  - **REACTOR**: 18%
  - **STRATEGIST**: 36%

- **Financial (cost vs. benefit)**
  - **REACTOR**: 27%
  - **STRATEGIST**: 30%

- **Cost per employee**
  - **REACTOR**: 20%
  - **STRATEGIST**: 24%

- **Turnover**
  - **REACTOR**: 14%
  - **STRATEGIST**: 22%

- **Diversity**
  - **REACTOR**: 11%
  - **STRATEGIST**: 20%

BASE: ALL RESPONDING FROM HBR AND EY SOURCES N=695
MEASURING (THE ROI OF) GLOBAL MOBILITY

When asked whether respondents measured the return on investment (ROI) of global mobility, for both strategists and reactors, the overwhelming response was “no”—or not yet. Figure 4

The top two challenges cited for measuring mobility ROI ranged from having no company-wide metrics in place and “mobility ROI is not seen as a priority.” It seems that developing ROI measurement capability would help make the case for a more proactive approach to mobility.

Absent a holistic measurement, strategists are doing a good job tying specific business and individual performance metrics to global mobility to assess the effectiveness of the global mobility programs. Figures 5 and 6

The metrics most commonly cited in the survey and interviews were growth plans, career development, talent management, and succession planning. Strategists in particular found ways to tie these planning goals to mobility. Figure 7

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**FIGURE 6**

**GLOBAL MOBILITY: TOP PERSONAL METRICS USED**

Which of the following metrics, if any, is your organization using to evaluate the impact of global mobility on individual performance?

<table>
<thead>
<tr>
<th>Metric</th>
<th>Reactor</th>
<th>Strategist</th>
</tr>
</thead>
<tbody>
<tr>
<td>Career progression of assignee</td>
<td>28%</td>
<td>50%</td>
</tr>
<tr>
<td>Skill acquisition</td>
<td>29%</td>
<td>42%</td>
</tr>
<tr>
<td>Performance rating of assignee</td>
<td>28%</td>
<td>37%</td>
</tr>
<tr>
<td>Fulfillment of predefined assignment purpose</td>
<td>24%</td>
<td>35%</td>
</tr>
<tr>
<td>Impact of knowledge transfer to host location</td>
<td>21%</td>
<td>32%</td>
</tr>
<tr>
<td>Financial (cost vs. benefit)</td>
<td>21%</td>
<td>16%</td>
</tr>
</tbody>
</table>

BASE: ALL RESPONDING FROM HBR AND EY SOURCES N=695
The head of international assignments for a building products manufacturer in Europe explains how they do it: “We focus on our succession planning strategy, which brings along global mobility. Succession is discussed fairly regularly among C-level executives. Also, there are two detailed sessions on Zone/Area and country level per year.”

As the telecommunications services company global mobility operations manager acknowledges, “Currently there are no predefined ways to measure the efficacy of global mobility program; however, as a great part of the assignments are based on projects, it is considered a successful assignment when the project comes to a completion as expected.”

The human resources director from a leading global packaging and chemicals company’s Indian subsidiary explains their progress in developing more holistic ROI measurements: “We are in the beginning stages of an ROI project, the first phase of which is to identify if they are still employed with our company. From there, we plan on a variety of analyses, the details of which have not yet been discussed or decided upon.”

**BENEFITS OF BEST-IN-CLASS GLOBAL MOBILITY PROGRAMS**

Not surprisingly, strategists reap the most significant benefits from global mobility programs. The three largest benefits cited were capitalizing on new market growth, developing local successors, and enhancing corporate culture. Improving diversity and grooming the C-suite of the future were also cited by strategists as critical outcomes.

“The company’s most important strategy is to grow a successful business, and a great part of the growth comes from engaging into business and contracts outside [our home country]. Therefore, global mobility’s role is key, as it ensures knowledge and experience are available where and when needed to fulfill the commitments with our customers,” explained the telecommunications services company global mobility manager.

Strategists also do a better job actively promoting mobility as a key part of leadership and career development for rising stars. The head of international assignments for a building products manufacturer describes how this works: “Placing key people in strategically important jobs to grow and foster our business is key to our success. By transferring employees internationally, the company benefits from knowledge and intercultural exchange, empowers global alignment, and is strengthening its position as a global employer and important player in the industry. A main driver to increase employee engagement is personal development. Driven by challenges and career growth, top performers are looking for international exposure and experience; and therefore, global mobility is crucial.”
FIGURE 7
PLANNING: STRATEGISTS INCLUDE GLOBAL MOBILITY

To what extent is global mobility considered in your organization’s planning in each of the following areas?

<table>
<thead>
<tr>
<th>Area</th>
<th>Reactor</th>
<th>Strategist</th>
</tr>
</thead>
<tbody>
<tr>
<td>Growth plans</td>
<td>43%</td>
<td>70%</td>
</tr>
<tr>
<td>Talent management</td>
<td>42%</td>
<td>68%</td>
</tr>
<tr>
<td>Career development</td>
<td>39%</td>
<td>64%</td>
</tr>
<tr>
<td>Succession planning</td>
<td>33%</td>
<td>58%</td>
</tr>
<tr>
<td>Employee retention</td>
<td>26%</td>
<td>49%</td>
</tr>
<tr>
<td>Diversity targets</td>
<td>16%</td>
<td>42%</td>
</tr>
<tr>
<td>Onboarding</td>
<td>18%</td>
<td>35%</td>
</tr>
</tbody>
</table>

TOP BOX SCORES (8-10, TO A GREAT EXTENT)

BASE: ALL RESPONDING FROM HBR AND EY SOURCES N=695
A vice president of sales from a North American global distribution management company explains the role global mobility plays in achieving business goals: “It helps to expand our global footprint by ensuring we have standard products, technology, and processes across our enterprise. It helps us accomplish our sales revenue and profitability goals based on our forecasts. It also helps us penetrate new markets and grow retail and commercial business according to plan. While not directly related to succession planning or talent management, it does influence how the management teams in each country are staffed, along with providing bench strength to possible positions in the United States.”

A regional head of operations for Latin America of an environmental and industrial products company ties it to alignment: “Global mobility is most important in transferring company values, business model alignment, and specific company knowledge into markets where that is needed.

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**FIGURE 8**

**GLOBAL MOBILITY: MOST SIGNIFICANT BENEFITS**

Within your organization, what are the most significant benefits of global mobility?

- Capitalizing on new market growth: 50% Reactor, 54% Strategist
- Enhancing corporate culture: 41% Reactor, 46% Strategist
- Developing local successors: 30% Reactor, 55% Strategist
- Improving diversity: 27% Reactor, 44% Strategist
- Grooming C-suite of the future: 27% Reactor, 40% Strategist
- Measuring and improving unit profitability: 27% Reactor, 31% Strategist
- Recruiting new employees: 16% Reactor, 24% Strategist

*BASE: ALL RESPONDING FROM HBR AND EY SOURCES N=695*
With presence in more than 50 countries and sales in 120, alignment needs to happen through managers on the ground. To efficiently ensure local managers are trained, we have to ensure presence of other managers who can ensure the messages are efficiently delivered ... Company values are very important and the tone needs to come from the top."

The human resources director from the global packaging and specialty chemicals company agrees: “Global mobility’s role is to support business objectives by ensuring that we mobilize employees in the fastest, most efficient, and cost-effective means possible, and in doing so, we support the achievement of company objectives. Global mobility is part of the talent management organization in our company, and we are constantly looking at ways to align global mobility with talent acquisition, strategic workforce planning, and succession planning.”

A director of strategic initiatives at an Indian subsidiary of a European oilfield products and systems company explains, “Global mobility is an integral part of this business, as very seldom will you find that you are working in your own country, due to the global nature of this business. We look forward to people movement to take care of competence and scalability.”
FORECAST FOR GLOBAL MOBILITY

Over the past three years, respondents have seen the need for a more globally mobile staff grow significantly. Respondents believe this trend will continue over the next three years. Figures 10 and 11

The human resources director from a global packaging and specialty chemicals company says the trend for global mobility demand “has grown in our organization, and we expect a steady growth in the next three to five years, especially as we expand further into emerging markets.”

Indeed, both strategists and reactors regard new market growth as the principal driver behind the growing need for global mobility (60 percent). Other top reasons for the anticipated rise in global mobility were an increased demand from candidates for cross-border assignments (36 percent), skills gaps in particular markets (32 percent), skills gaps in the organization (30 percent), and mergers/acquisitions (26 percent). The metrics they’re using to evaluate workforce needs

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FIGURE 10

CHANGES IN NEED FOR GLOBALLY MOBILE STAFF

To the best of your knowledge, has the need for more globally mobile employees grown over the past three years? Over the next 2-3 years, do you believe the need for global mobility will increase, decrease, or remain the same in your organization?

○ PAST 3 YEARS ○ NEXT 2–3 YEARS

Increased significantly

21% 25%

Increased moderately

42% 47%

Stayed the same

21% 19%

Decreased moderately

3% 3%

Decreased significantly

7% 1%

Don’t know

5%

PAST 3 YEARS VS. NEXT 3 YEARS, ALL HBR RESPONDENTS

BASE: ALL RESPONDING FROM HBR SOURCES N=389
over the next few years include talent development, succession planning, overall future market growth, regional market growth, skills gaps, and demographic shifts. Here, too, strategists are much more apt to use a metrics-focused lens to help in forecasting mobility needs, Figure 12.

Some organizations are working hard on balancing the costs and benefits of mobility as needs rise: “Demand for international talent will probably further increase but will be managed with more localizations rather than new assignments to minimize cost. We have the home-based approach,” explains the head of international assignments for a global building products manufacturer.

The global mobility manager from a U.S. agriculture and industrial products company quantifies their growth trajectory: “With respect to our long-term assignees, we have been hovering around 500 for the past five years and expect this to be the case in the future. We expect short-term
assignments to increase, as well as ‘special’ employment relationships such as virtual employment, employees working and living in different countries, and trailing spouses.”

The regional head of operations of an environmental and industrial products company explains how their mobility strategy aligns with corporate growth: “The company is growing, and our need for expats is growing even faster. The horizon is medium-term, as any expat should start making himself/herself superfluous from Day One at the job. The goal is to build a local team and to train the local employees to be able to run the business even better than an expat can within a three-to-five-year horizon.”

**CONCLUSION**

The expectation among business executives around the globe is that the need for global mobility, in particular to fuel new market growth, will only rise. And global mobility in best-in-class organizations is seen as a solution to other talent management priorities, such as succession planning, increasing diversity and employee engagement, and improving financial performance. Organizations that take a strategic approach to their global mobility program stand to reap the greatest benefits.
METHODOLOGY

The survey was conducted in July 2014 and received 695 responses. It focused on global companies with people who are based or who travel abroad for the purpose of improving their business.

Organizational Size
The survey screened out respondents in organizations with fewer than 50 employees; the average number of employees per organization was 6,867. The total sample average revenue was $3.1 billion.

Seniority
Respondents were a mix of senior managers (29 percent), executive management (16 percent), middle managers (37 percent), and other titles (18 percent).

Job Functions
Most common job functions included HR/training (41 percent), finance/risk (11 percent), general management (8 percent), operations/production management (7 percent), and sales/business development (4 percent).

Industry Sectors
Respondents were from a wide number of industries, including manufacturing (17 percent), financial services (11 percent), technology (10 percent), energy/utilities (10 percent), and pharmaceutical/medical/life sciences (7 percent), among other categories with less than 7 percent.

Regions
Eighty-seven percent of respondent organizations have operations in more than one country; 56 percent are in more than ten countries, and 23 percent operate in more than 50 countries. All of the interviewees were from global companies with operations in more than 25 countries.

NOTE: Respondents to this survey were drawn from the Harvard Business Review reader audience as well as Ernst & Young’s (EY) client base. Harvard Business Review Analytic Services’ analysis found that the EY data set was heavily populated by best-in-class, or strategist, global mobility organizations. Therefore, for the purposes of the analysis, when analyzing the attitudes and behaviors of ‘strategist’ global mobility decision makers (those with a proactive, structured approach) versus their more reactive counterparts, the EY data set is utilized along with the Harvard Business Review Analytic Services data set. When analyzing results where a perspective representing the “total market” was desirable, the Harvard Business Review Analytic Services data set is used on its own (figures 1 and 10).