



The EY 2024 Mobility Reimagined Survey

How Mobility functions can evolve and thrive with a workforce in flux



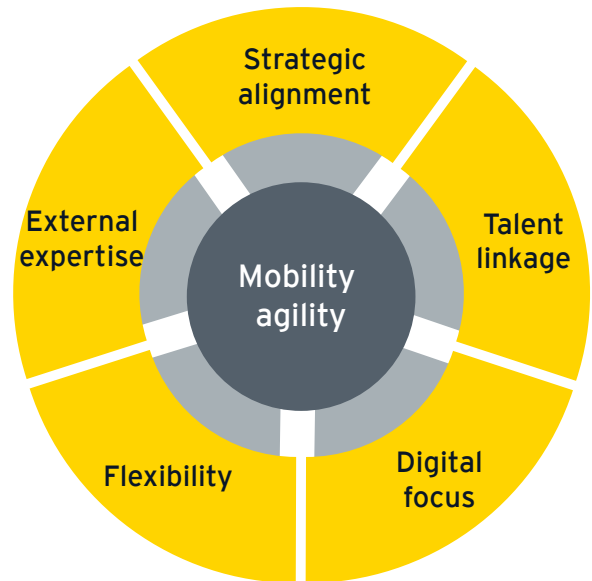
The EY 2024 Mobility Reimagined Survey reveals mobility agility can drive business resilience, if the mobility function evolves to activate key drivers. Past mobility models focused only on business travel or long-term relocation are not necessarily fit for a more digital, integrated and strategic purpose. Proactive organizations which focus on key drivers are best positioned to realize better outcomes for mobile employees, business goals and organizational resilience.

Forged in an era of dynamic challenges, modern workforce mobility functions are now called to fill new needs and challenge old assumptions. The “[next normal](#)” of work has accelerated the need for organizations to proactively refine how and where they work across jurisdictions, while enhancing employee experience linked to the “why.” Past mobility models rooted solely in business travel or long-term relocation are not necessarily fit for a more digital, integrated and strategic purpose. Instead, functions need to evolve their approach to workforce mobility to be high-impact, efficient, and cost-effective while helping to achieve growth for the business and for people.

Now in its second year, the EY 2024 Mobility Reimagined Survey builds on trending insights from more than 1,000 mobility professionals and employees across 21 global geographies. The results identify drivers of evolved mobility functions that can lead to better outcomes for mobile employees, business goals and organizational resilience. The drivers are: strategic alignment, talent linkage, digital focus, flexibility and use of external expertise.

Mobility functions that focus on the five drivers are 2.3 times more likely to say mobility helps organizational resilience; 2.2 times more likely to say mobility improves their sustainability agenda; 1.5 times more likely to say mobility helps address talent shortages; and 1.3 times more likely to cite positive mobility return on investment (ROI) and response to talent shortages.

To meet the challenges and opportunities ahead, organizations should evolve workforce mobility to provide a cross-border approach that is high-impact, efficient, and cost-effective to help promote growth for the business and for people.



Survey highlights (Executive summary of survey findings):

- ▶ **More scope, tighter budgets:** 71% of employers say cross-border mobility risks have increased in the last two years, with 66% expecting mobility's scope to increase. Nearly all respondents (97%) are looking to manage costs more effectively.
- ▶ **Retaining talent:** 64% of employees say they're more likely to stay with their employer after a long-term cross-border assignment, with the quality of the experience being the most relevant factor.
- ▶ **Unrealized potential:** 95% of employers believe there are benefits to more closely aligning mobility to business and talent goals, but 60% still see mobility as isolated or siloed from other functions.
- ▶ **Defining ROI:** Nearly all employers (99%) are tracking ROI of their mobility programs, up from 80% in 2023. But there is greater opportunity to align effective metrics with the shape and purpose of the mobility function.
- ▶ **Generative technology:** 93% of mobility functions are using generative AI (GenAI) to some extent, with only 22% using it routinely. The most "evolved" mobility programs are nearly twice as likely to already use GenAI routinely, compared to programs that are merely "effective."

Trending insights

Because mobility is so critical to business success, there is an increasing focus on it

Changes from EY 2023 Mobility Reimagined Survey results to EY 2024 Mobility Reimagined Survey results	2023	2024	But are you asking the right questions about mobility in flux?
Employers thinking mobility function is critical to business continuity and resilience	74%	89%	The role of mobility in securing organizational resiliency is reconfirmed, but effective execution is not.
Employers planning to increase investment in mobility technology over the next five years	67%	80%	There is a greater focus on mobility technology. Is this investment sustainable and smart?
Employers tracking the ROI from their mobility programs	80%	99%	More functions are tracking ROI. But are we tracking the right things and understanding ROI?
Employers tracking domestic and international employee movements	49%	98%	There is greater awareness of the cross-border mobility risk. Does the policy effectively mitigate these risks?
Employers having developed a policy or approach for hybrid mobility	76%	82%	Hybrid mobility is no longer a nice to have. But can it replace a physical move?



1 Evolving mobility to break old assumptions

Workforce mobility is critical for business resilience. New challenges require it to strategically evolve to face growing complexity.

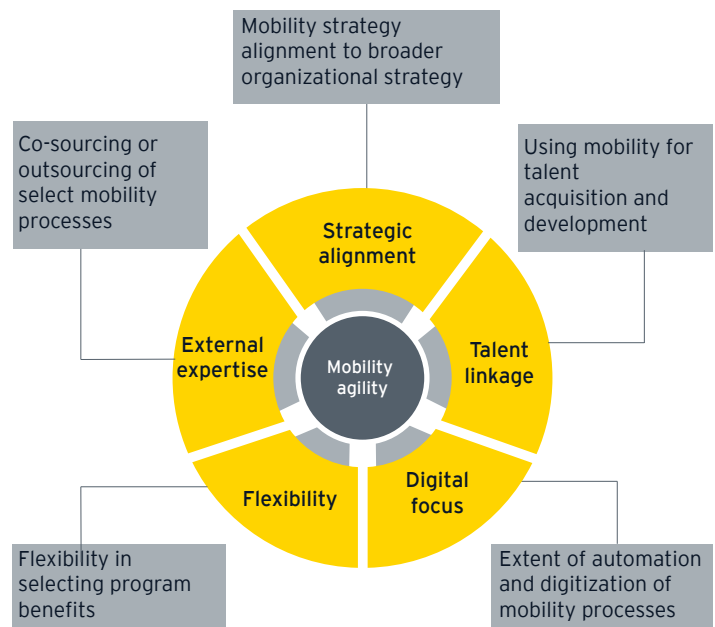
Beyond any single or cyclical event, new conditions for cross-border business require new thinking about the purpose and potential of workforce mobility programs. Market and labor trends demand more agility and thoughtfulness around mobility investment and influence within organizations.

Following a dramatic decrease in business travel spending connected to economic, health, and geopolitical uncertainty, **spending** is expected to reach US\$1.8t by 2027, up 75% from 2022 levels. At the same time, employers are looking globally to find in-demand skills, and are building models for a knowledge-driven workforce that **shows a preference** to work remotely at least two days per week.

Mobility professionals already show some adaptation to the new demands on their function, especially with respect to implementing systems or policies to address increased risks with a distributed workforce. With added focus on workforce mobility comes a need for added visibility: nearly all employers (98%) say they are tracking domestic and international employee movements, compared to just 49% of employers in last year's survey. Growing attention on the increased scope of mobility is also evidenced in slightly higher numbers of employers who have developed policies or approaches for flexible mobility, and expect higher mobility technology investments in the next five years.

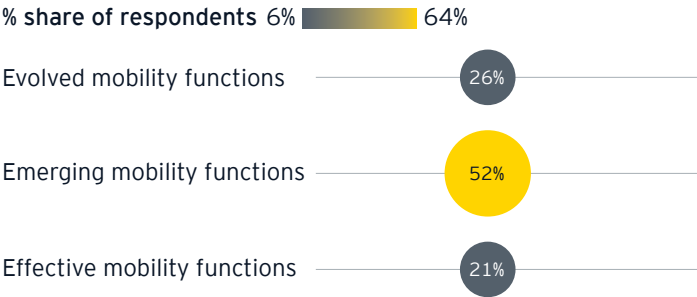
To thrive in this era of flux, mobility functions need to do more than adapt at a piecemeal pace. Functions which fully evolve their models with an agile mindset, serving their organization's business and talent strategy in a cost-effective way, see better outcomes.

Evolved mobility functions have acted on these five areas....



Survey respondents fall into three categories based on their level of adoption of these five drivers, with an “Evolved” 25% showing highest adoption levels; an “Emerging” middle 50% showing some adoption; and 25% having functions that are merely “Effective,” with low adoption.

We used five drivers to segment mobility functions based on their maturity, identifying key differences by area and sector



When comparing findings of the “Evolved” group with mobility functions that are just “Effective,” there are clearly better reported outcomes for organizational resilience, ROI, securing talent, and achieving sustainability goals.

Resilience

2.3x

More likely to say mobility helps organizational resilience.

Sustainability

2.2x

More likely to say mobility improves their sustainability agenda.

Race for talent

1.5x

More likely to say mobility helps respond effectively to talent shortages.

Return on investment

1.3x

More likely to cite positive ROI from their mobility program.

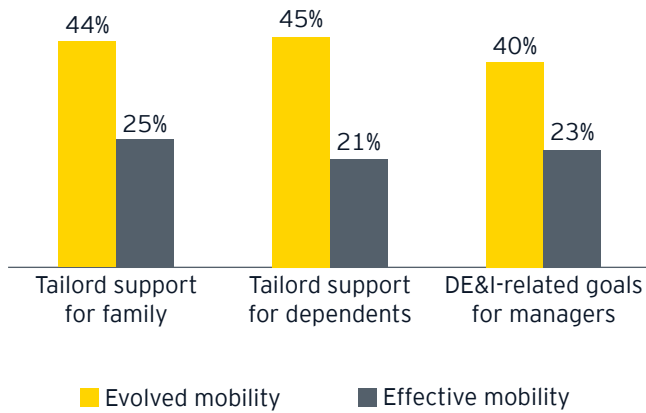
Aligning metrics with desired outcomes

Part of understanding the present and potential influence of mobility on the wider organization is having metrics that measure the function based on the right focus areas. Although nearly all mobility professionals are tracking ROI in some way, there is no universal norm. The largest number of employers (64%) track performance ratings, with cost (56%) and the function’s impact on business revenues and finances (54%) being the next most common metrics feeding an ROI analysis.

But to realize the mobility function’s strategic potential, especially connected to talent strategy, organizations need to adapt what metrics they track, and how. They need to ask whether they are tracking the right things, and whether they really understand their objectives and are collecting metrics accordingly. For example, if an organization wants to know what role mobility assignments play in career pathways, they should measure those outcomes. At present, less than half of respondents track talent retention and employee promotion after a mobility assignment, with further disparities between mobility program types seen through the lens of inclusive and equitable growth. “Evolved” mobility functions are roughly twice as likely than “Effective” functions to track KPIs of tailored support for family members or dependents, and having diversity, equity and inclusion-related goals for managers.



The role of mobility in driving diversity, equity, and inclusion (DE&I)-related goals



As most mobility professionals (57%) report “somewhat positive” or “neutral” returns on their mobility programs, there is an opportunity for organizations to recalibrate their collection of metrics around sustainability, talent and business goals in a tangible and realistic way. This recalibration can provide hard data of mobility’s strategic influence, and help organizations realize its potential.





2 Workforce flexibility and the race for talent

The mobility function can help re-energize your workforce, if it is aligned and measured with talent strategy in mind.

The imperative for mobility functions to evolve in step with talent strategy is as much a reflection of current trends as it is a recognition of a greater transformation in workforce realities. The [EY 2023 Work Reimagined Survey](#) reported a persistently high number of employees (34%) willing to leave their jobs in the next year, with pay being their primary concern. Employees and employers largely agree the question is settled as to whether remote and hybrid work will persist in the “next normal.” The new question is in what form, and to what end.

Mobility professionals say their organizations recognize this shift, with 82% having developed a policy or approach for hybrid mobility. But employers aren’t yet convinced that remote work is an adequate alternative to cross-border travel. Just 41% of employers think hybrid mobility can replace physical movements of employees, and 49% believe it doesn’t offer the same level of learning for senior professionals especially.

Importance of in-person

41%

of employers think hybrid mobility can replace physical movements of employees.

Learning potential

49%

of employers believe hybrid mobility doesn’t offer the same level of learning for senior professionals especially.



Still, to respond to what prospective and current employees are seeking, organizations need to remain flexible in how they think about their mobility programs and talent strategy. Mobility functions need to be built for remote, hybrid and physical mobility experiences, without neglecting the advantages or pitfalls of a single configuration.

For example, 92% of mobile employees say an international experience can be life-changing. It's testament to the influence a cross-border assignment can have on current employees, and prospective ones. Employees cite career growth as the leading reason to seek further mobility experiences, with 64% saying they are more likely to stay with their employer after a long-term mobile assignment. Analysis shows that the quality of the experience matters most in the staying power of the mobile assignment.

Recognizing the broader benefits to talent development is another distinction between "Evolved" and merely "Effective" mobility functions. Nearly all (96%) of "Evolved" functions and just 41% of "Effective" employers are tied to two or more core areas of talent development, including:

- Developmental programs designed to include mobility experiences
- Mobility included as part of career milestones for leadership
- Early career programs designed with mobility steps
- Mobility experiences offered to top and solid performers

Recognizing risk and realizing talent opportunities

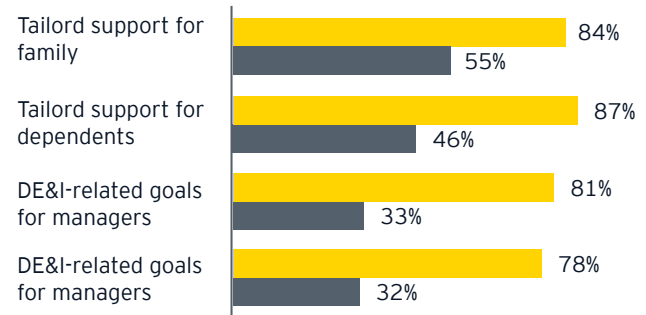
Efforts to improve mobility programs to better serve broader workforce strategy cannot ignore increased complexity and risk exposure. For all the potential dividends tied to integrating varied mobility types with talent goals, there remains a gap in recognition and focus of legal, tax, cybersecurity risks associated with a mobile workforce. Employers are much more likely than employees to be aware of the risks arising from their hybrid work strategy, for example, but awareness doesn't always lead to action.

While 84% of employers recognize data privacy risks from hybrid mobility arrangements, just 55% have policies to address those risks – a moderate improvement from last year's 47%. On the other hand, an even greater 87% of employers are aware of cybersecurity risks from hybrid work, but just 46% have policies to address them, down from 51% last year. The need to close the gap of awareness and action to manage risks is one proactively addressed by the more "Effective" functions, and is an area of necessary focus for all.

With increasing risk, functions need to adapt with purpose

The risk deficit: While most employers acknowledge the risks arising from cross-border assignments, a much smaller share is addressing them as part of their hybrid mobility policy

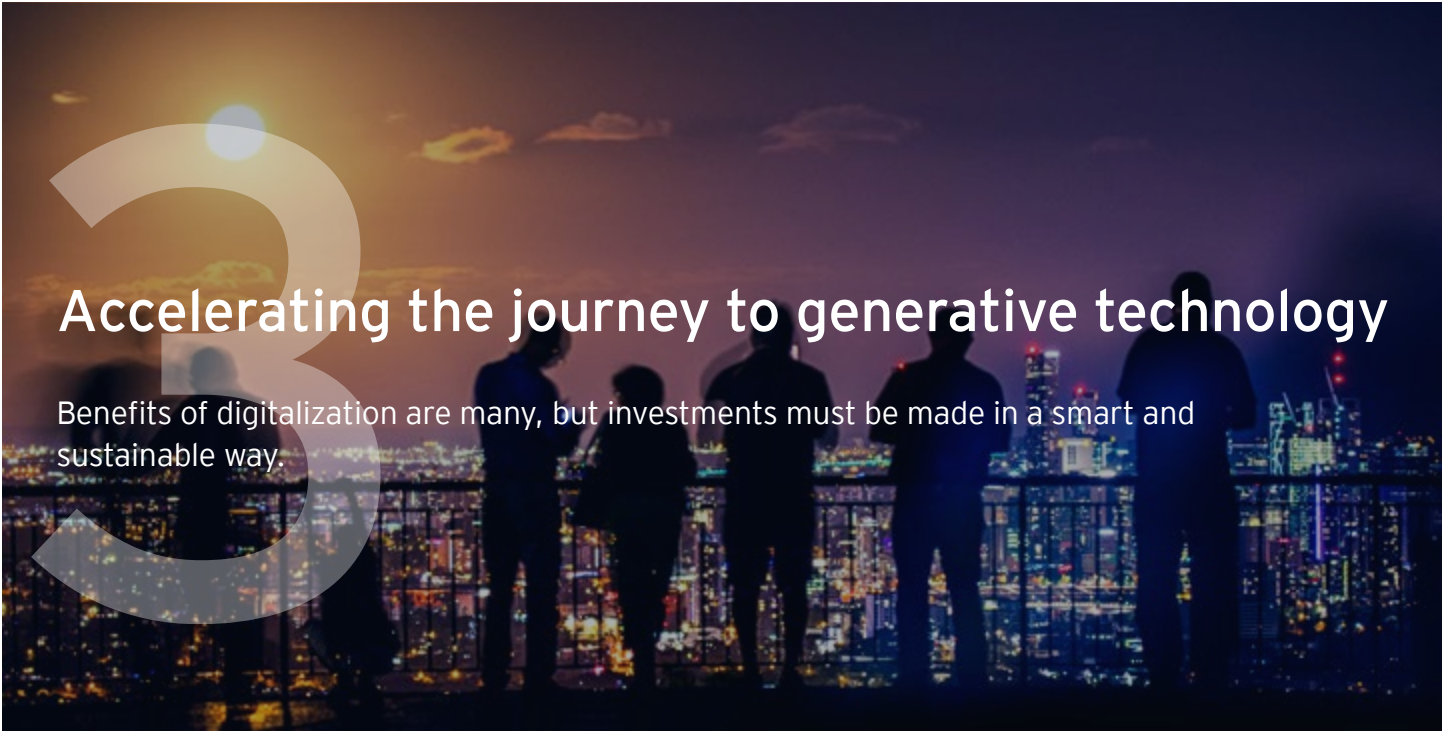
Which of the following risks arise from use of hybrid mobility arrangements



■ Employers (%) acknowledging the risk
■ Employers (%) covering the risk in hybrid mobility policy

There is no one-size-fits-all approach to mobility programs, with organizations needing to chart their path based on a unique constellation of designs and objectives. By linking the function to talent development goals and processes, and to targets for talent attraction and retention, organizations can add greater value for employees through exceptional experiences, and encourage new workforce models for agile organizations.





Accelerating the journey to generative technology

Benefits of digitalization are many, but investments must be made in a smart and sustainable way.

Increased complexity in enabling a cross-border and distributed workforce has only heightened the need for streamlined and advanced technology that also contributes to an improved employee value proposition. For employees on a cross-border assignment or hybrid working arrangements, the right technology is a lifeline to their teams and a resource to improve efficiency. Mobility functions have a role in helping to realize operational gains while enhancing employee experience.

In the next two years, 80% of mobility professionals plan to increase their investment in mobility technology, up from the 67% planning increases in last year's survey. Most employers (91%) see automation and digitalization as beneficial for the function, with the top three benefits found in process simplification, process standardization, and compliance with tax and immigration policies.

The accelerating journey toward GenAI tools will also likely influence investments and workflows in the coming 12 months. Currently 71% of mobility functions only use GenAI somewhat, with 22% using it routinely. Sentiment around the technology is positive, with 79% of employers saying GenAI will have a positive impact on the function in areas like ways of working in the function, ways of working flexibly, employee experience and enabling new job opportunities.

This expectation of the benefits of GenAI for mobility functions aligns with sentiments of the broader workforce seen in the [EY 2023 Work Reimagined Survey](#). That survey showed a 33% net positive sentiment of employers and employees who believe GenAI will boost productivity and new ways of working, with an even greater 44% net positive of respondents expecting GenAI to benefit flexible working.

Proactive adoption

22%

of employers are using GenAI routinely.

Growth potential

71%

of employers are using GenAI somewhat, with the potential to tip into routine use in the coming year.

The potential of GenAI solutions is still being realized, but some applications are already seen as enhancing mobile employee experience. The use of AI-based chatbots, language tools or travel assistants can foster connection and access to information in an asynchronous working world. These specific use cases are in addition to GenAI's inherent ability to create "rough drafts" of unique outputs based on disparate data sets.

A people-first approach to technology

But technology is only useful in the hands of people trained and comfortable using it. With a rapidly evolving technology ecosystem – especially connected to GenAI-enabled solutions – there can be an impulse to fill operational needs without assessing the full strategic impact. Rising cost pressures underscore the need for targeted investments that serve broader business goals. Increasing competition to find people with in-demand skills **bolster the case** for organizations to keep a people-first mindset through technological innovation. “Evolved” mobility functions are more likely to be trying

transformational technologies to stay competitive, with 27% routinely using GenAI at work compared to 14% of functions that are just “Effective.”

For mobile employees, user experience (UX) of technology has a direct connection with their overall employee experience (EX). Framing digitalization efforts as part of a broader evolution of the mobility function, in line with integration with workforce strategy, holds greater opportunities than remaining in a transactional silo.



4 Rethinking models for mobility's new frontier

With added scope, mobility needs to evolve its operating model for a new kind of cost-capability calculus.

With added scope, closer strategic alignment and added investments in technology, mobility functions will need to reimagine their operating models to account for better coordination of internal stakeholders and external partners. Most respondents (58%) to the [EY CEO Outlook Pulse](#) said they are planning to accelerate transformation efforts in the next 12 months, with roughly three-quarters of CEO respondents expecting a “lower for longer” economic growth environment. For workforce mobility, and the two-thirds of employers expecting the scope of the function to grow without major growth in headcount, these factors require a new cost-capability calculus in how the function operates.

Already, mobility functions report a mix of operating models. The most common are centralized models, used by 46% of respondents, or centers of excellence (CoE), used by 45%

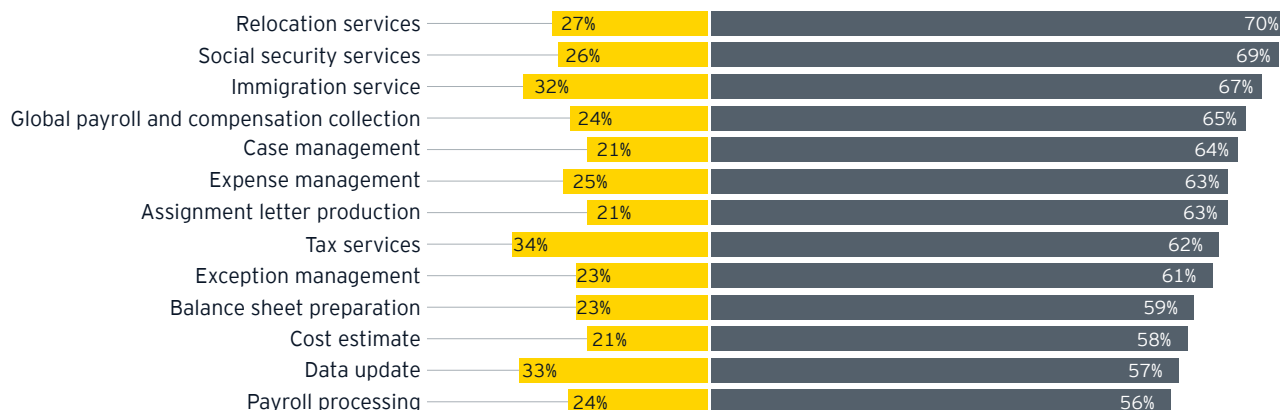
of mobility functions. Greater divisions in operating model choices are seen when comparing “Evolved” mobility functions with their counterparts, showing much more willingness to mix and match resources to provide the greatest service to the organization, and greatest level of adaptability to increase efficiency while alleviating workload pressures.

This willingness to flex operating models allows mobility functions to refine certain activities based on their organization's profile, needs, and resources. Of employers, 83% see benefits in engaging third-party service providers for certain processes and aspects of mobility programs. But outsourcing is more often part of the solution for more complex organizations. As such, employers are more likely to outsource mobility processes if they have more complex operations across multiple countries.

Evolved mobility functions are significantly more likely to leverage outsourcing to reduce cost, mitigate risk, and increase value

% of mobility functions fully or partly outsourcing

Mobility Function ■ Effective ■ Evolved



Maintaining greater organizational visibility and integration with other functions is a concern for employers regardless of operating model, but the use of a CoE shows at least moderate improvements in connectivity. For employers with centralized mobility functions, 65% say the function is siloed from the rest of the business, compared to just 57% of employers with a CoE model. Two-thirds of employers with a shared service center model say the mobility function is hindered by lack of data exchange, compared to the lower 57% of employers with a CoE. The CoE model may see better connectivity because it offers a separation of delivery for mobility services, allowing a focus on strategic work to be completed elsewhere.

Five actions to drive an “Evolved” mobility function

As organizations look to evolve their mobility function to cope with growing complexity, and help achieve broader strategic goals, it's important to recognize the interplay of agility and resilience. By being willing to embark on a bespoke reimagination of mobility's capabilities and strategic role, organizations can break the function out of transactional isolation.

Here are five actions for organizations to take:

1 Act strategically

- ▶ Ensure Mobility is aligned and embedded in wider organizational strategy.
- ▶ Increase the strategic effectiveness of mobility by reducing operational silos and improved exchange of data with other business functions.

2 Integrate with talent

- ▶ Embed mobility into the wider workforce agenda, recognizing its importance to developing future leaders.
- ▶ Enhance the mobility experience. Mobility has a crucial role in boosting talent retention, and the quality of the assignee experience is central to this.

3 Focus on digital

- ▶ Promote the use of new digital tools and ensure humans are at the center of transformation.
- ▶ Prepare for GenAI to become widely adopted, with the potential to transform ways of working and mobile employee experience.

4 Build people-first mobility programs

- ▶ Build in flexibility to mobility programs to enhance employee experience.
- ▶ Create a people mobility strategy that enables compliant hybrid and remote work.
- ▶ Put sustainable and inclusive thinking at the heart of Mobility programs.

5 Develop resilient operating models

- ▶ Proactively address the rising risks caused by the changing mix of work models and international regulation.
- ▶ Leverage external providers to access know-how and take the pressure off in-house resources.



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