

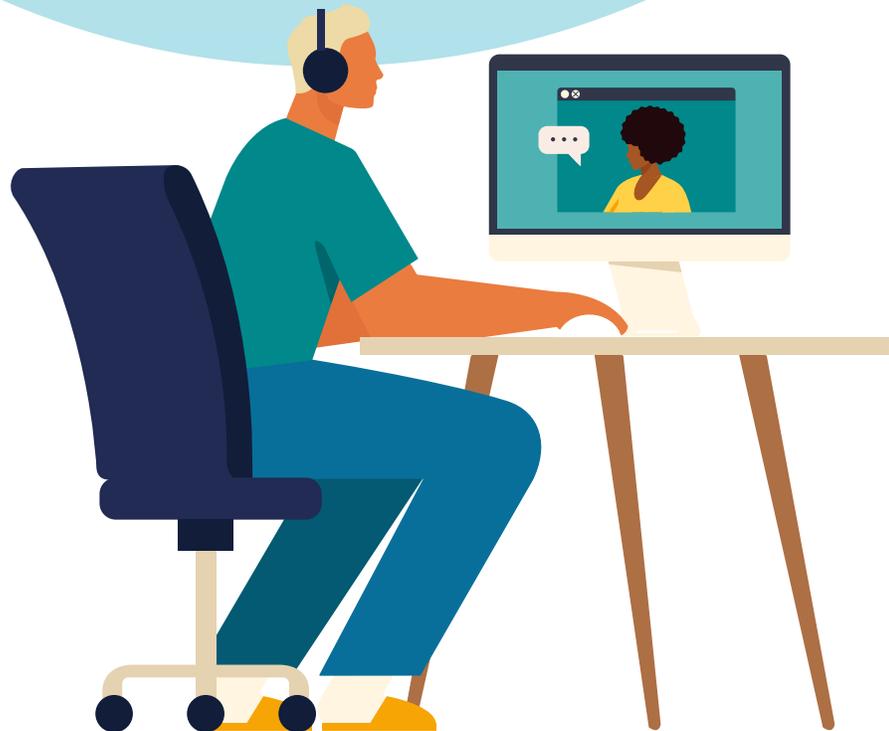
# MOBILITY OUTLOOK SURVEY 2022





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2022

# Mobility Outlook Survey

Global Mobility has emerged from the pandemic as a remarkably different function. After a second year managing travel restrictions, heightened immigration complexity, and remote work consequences, **Mobility has honed its compliance skills and is shifting focus to address its next big challenge** – helping attract and retain top talent.

Prior to the COVID-19 pandemic, **many Mobility leaders made efforts to align mobility packages to the organization's talent agenda** – and that led to more business flexibility and more policy types. Now, talent shortages are changing the narrative. The desire for business flexibility continues to grow (as does the policy suite), but there is greater emphasis on providing choice for employees. **Programs are not necessarily growing richer, but rather more customizable.** Employees are gaining the ability to personalize their relocation benefits, select the delivery of those benefits and, in some cases, even choose when and from where they report to work.

Rather than transactionally moving people, Mobility's new target value proposition is **offering the business and Talent Acquisition a compliance strategy with the flexibility needed to attract and retain top talent.** Mobility leaders are striving for this in several ways. They are collaborating more with Talent Acquisition to quicken offers and deployments. They are delivering cost predictability and broader package investment points for the business. **Mobility is adopting a more advisory role, evident in the deliberate ways they now leverage vendor networks to creatively solve immigration and tax challenges.**





**Complimenting Mobility's strategic directives for 2022 are efforts to improve program efficiency in preparation for the anticipated increase in moves this year.** Most participants hope to gain efficiency through technology, but the data also shows acquiring additional mobility skills and headcount are underway. Finally, Mobility has become increasingly invested in remote work both from a facilitation perspective and a strategic one. Leaders are lending their expertise and resources to help make individual decisions and to forge corporate policy around the new ways of working.

**The 2022 outlook report declares optimism for the year ahead, explores the opportunities lying between the current and ideal future state, and showcases how Global Mobility is working** to contribute toward differentiated status for their organizations. Let's explore the gaps, gains, and plans for the year ahead.



For 2022, we will pursue becoming an ambitious and strategy-driven GM department embedded in a strong and efficient HR environment.”

– EUROPE-BASED MANUFACTURING COMPANY

# What does your organization value the most from your Global Mobility function?

Mobility advice to the business

2.1

Compliance expertise  
(e.g., immigration, etc.)

2.3

Employee experience with mobility

3.1

Operational capabilities

3.3

Mobility advice to talent

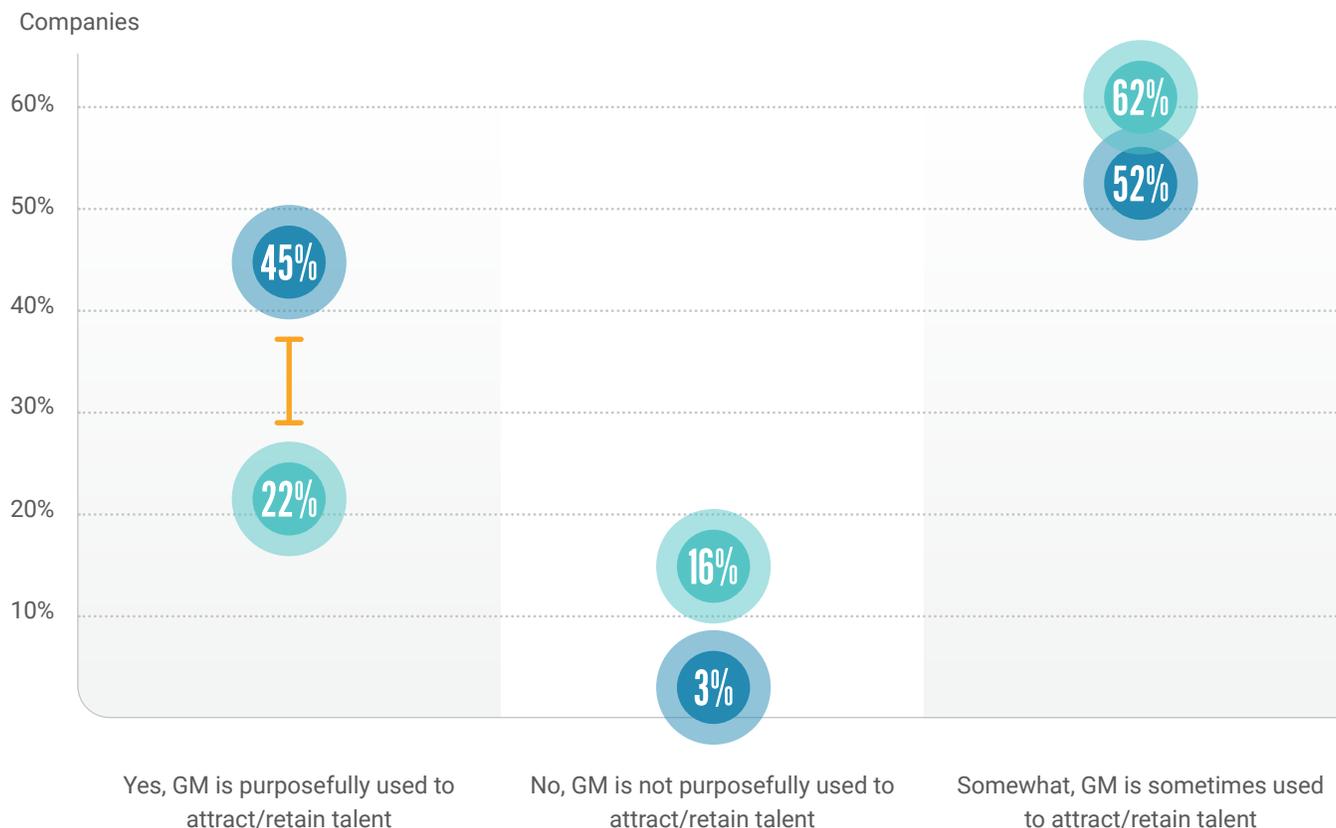
3.7

**KEY:**

1 = Highest Value  
5 = Lowest Value

# Is your company purposefully using Global Mobility to attract and retain talent?

Key:  Current  Future



We plan to spend 2022 focusing on talent strategy along with process and policy enhancements.”

- NORTH AMERICA-BASED CONSUMER GOODS COMPANY



# What would allow you to administer your mobility program more effectively? (SELECT ALL THAT APPLY)



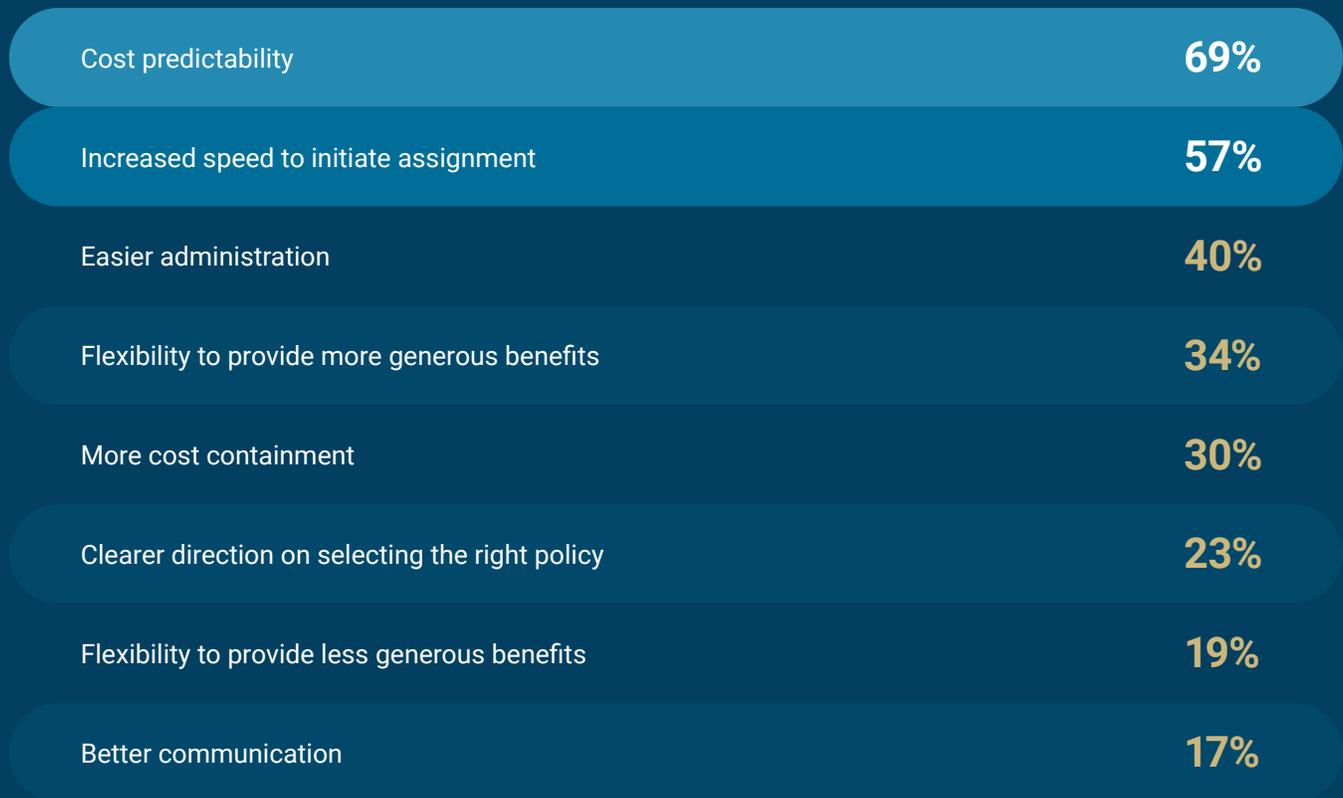
I think more and more companies are focused on cost containment while still providing flexibility, transparency, and speed on mobilizing talent. This is why technology enablement is key to doing more with less."

**- NORTH AMERICA-BASED ENERGY SERVICES COMPANY**



Mobility has long reported tension between compliance requirements and the speed and cost of deploying talent. **Cost predictability and speed to deploy talent continue to be the top requests from the business, per 69% and 57% of organizations respectively.** While cost predictability has improved thanks to the sophisticated calculators available today, immigration law changes and related delays have become harder to overcome. In discussions with us, our clients outline the creative workarounds they employ to mitigate immigration challenges like redirecting talent to alternative locations, leveraging interim virtual assignments, and using rotations or commuting arrangements to fulfill business needs.

## What does Global Mobility get asked for the most from the business? (SELECT TOP 3 REQUESTS)



We need to make sure Mobility can enable global opportunities for all staff through a consistent but flexible policy, reducing the administrative burden, and using technology to help provide in-depth analysis particularly around costs.”

– EUROPE-BASED RETAIL COMPANY

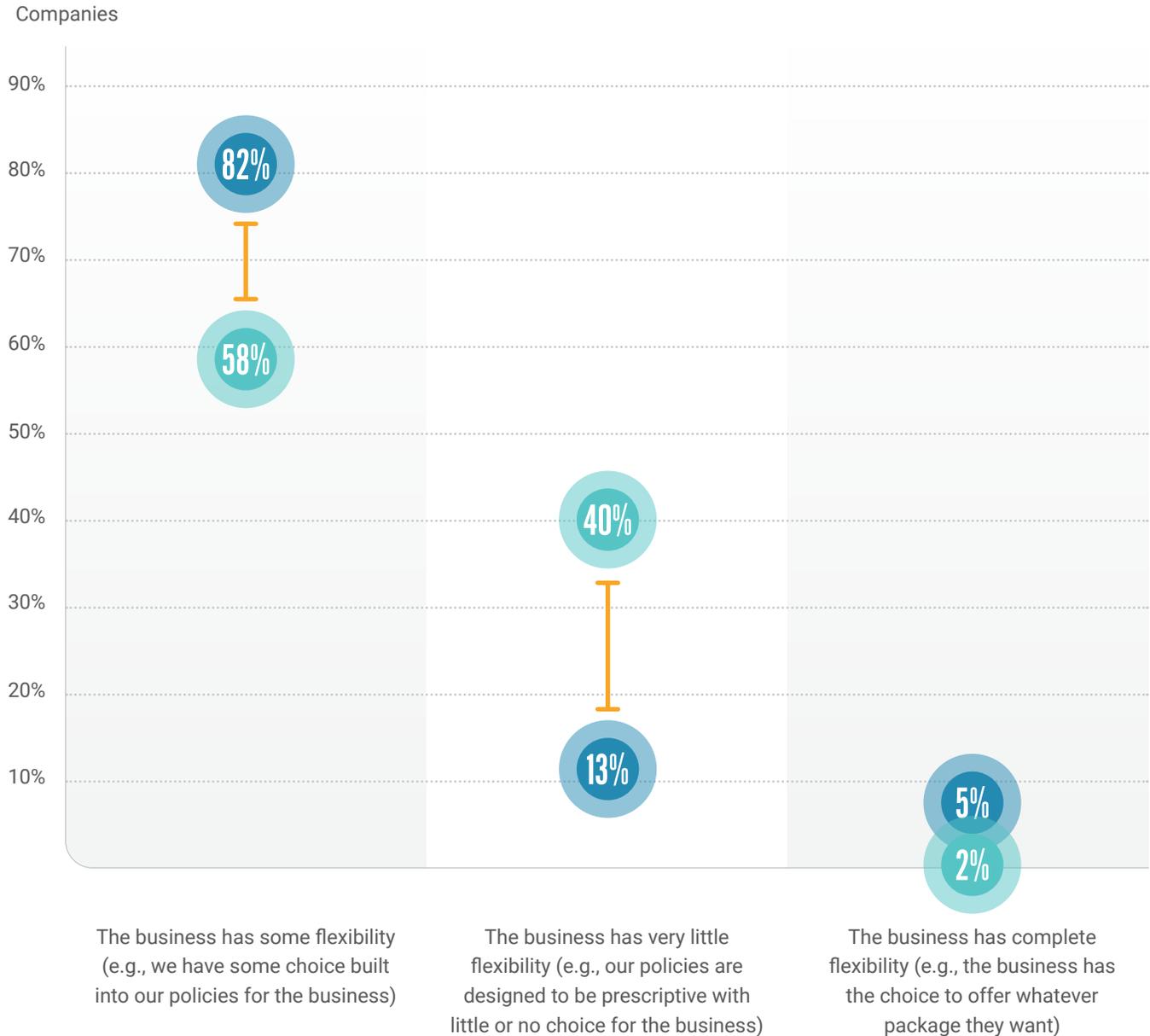
Many participants indicate they are on a journey toward greater flexibility for both the business and employees. Eighty-two percent of companies state the business should have some flexibility and 56% say employees should have moderate flexibility. To get there, Mobility will need to close the gap between these aspirations and the current state where 58% offer the business some flexibility and 29% offer moderate flexibility for employees.

Increasing flexibility for the business helps recruit and deploy the talent needed to execute their strategy. Similarly, increasing employee flexibility has numerous positive outcomes and a few challenges. **More flexibility encourages diversity and inclusiveness among mobile talent. It also improves engagement and helps attract talent to opportunities.** On the other hand, companies that limit employee choice do so to ensure consistency and equality or because of administrative limitations. It's clear that mature Mobility programs are pursuing the tech and skillsets needed to increase flexibility because they perceive the benefits outweigh the concerns.



# How would you describe your overall approach to providing flexibility to the business?

Key:  Current  Future



The business has some flexibility (e.g., we have some choice built into our policies for the business)

The business has very little flexibility (e.g., our policies are designed to be prescriptive with little or no choice for the business)

The business has complete flexibility (e.g., the business has the choice to offer whatever package they want)



We will implement a new Global Mobility policy with more flexibility for the business.”

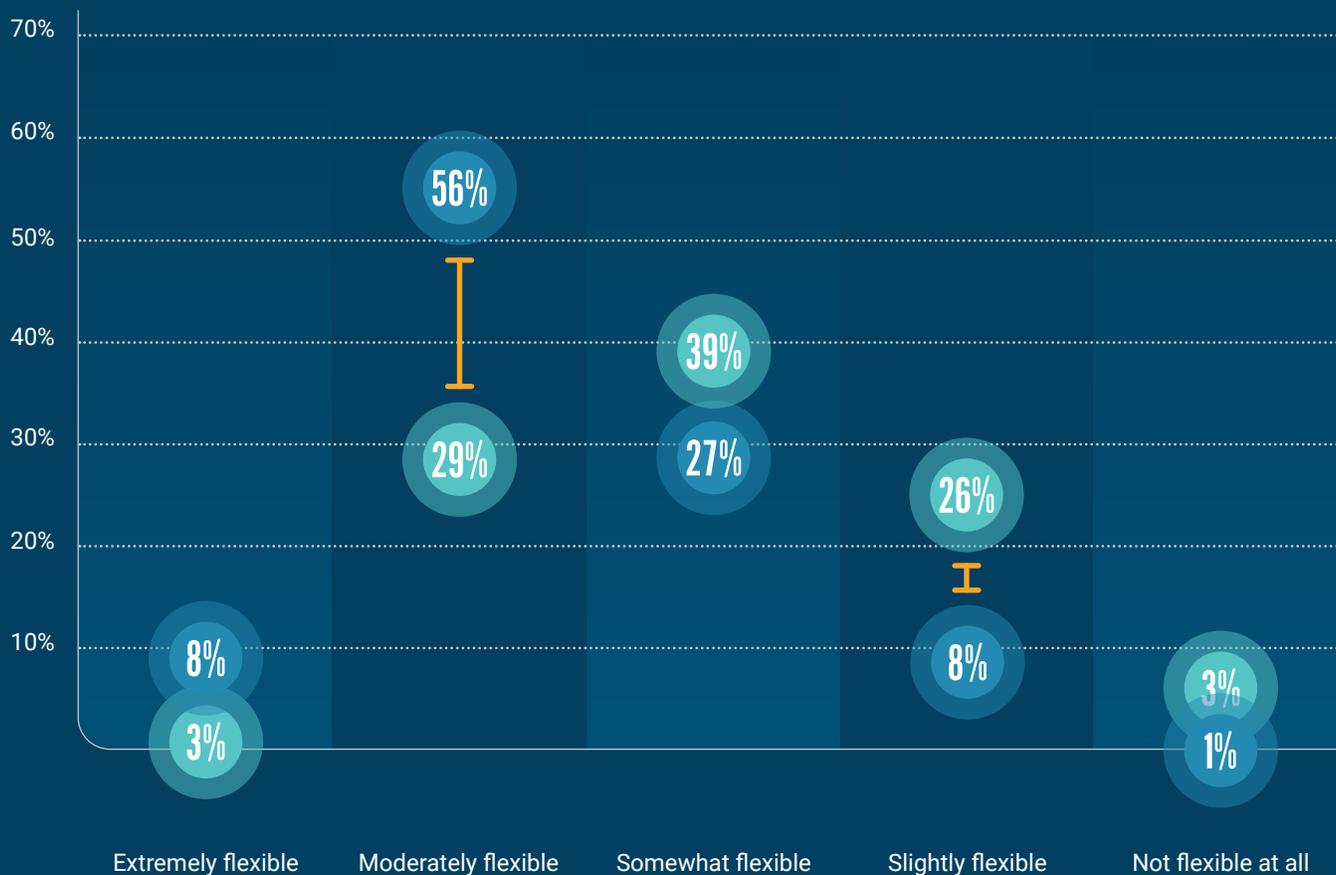
– ASIA-BASED CHEMICALS COMPANY

# How flexible is your mobility program in terms of supporting individual circumstances and needs?



Key: ● Current ● Future

Companies



At this stage in our evolution, we are finding the need to provide more consistency across similar employee demographics to ensure fairness and equity to our employees.”

– NORTH AMERICA-BASED TECHNOLOGY COMPANY



# Are you offering employee flexibility in any of the following ways? (SELECT ALL THAT APPLY)

53%

## Cash Lump Sum:

Fixed lump sum to offset some or all relocation or other support

↗ UP 13% COMPARED WITH LAST YEAR'S RESULTS

27%

## Delivery Choice:

Allowing the employee to choose between a lump sum or in-kind services managed by suppliers

↗ UP 5% COMPARED WITH LAST YEAR'S RESULTS

15%

## Managed Cap/Budget:

Capped budget against which employees can request services of their choosing

5%

## Flex Points:

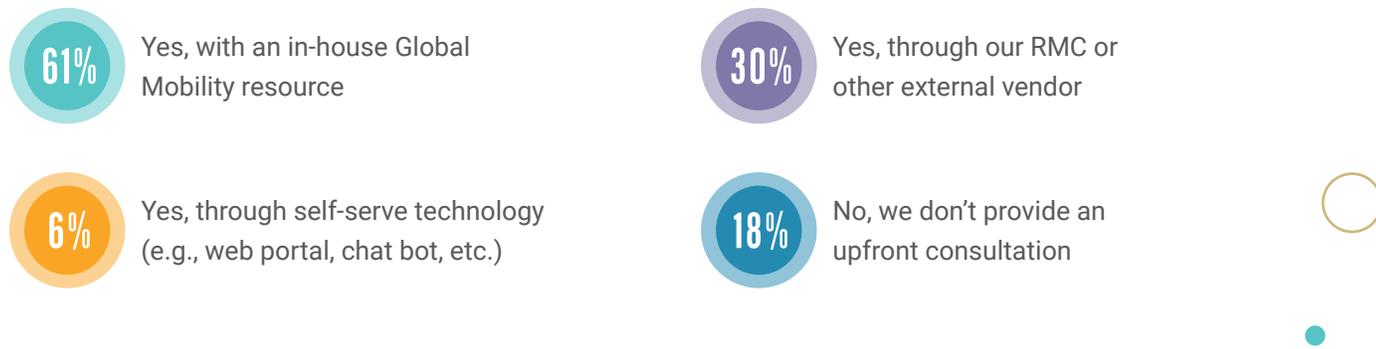
Flex point program in which employees can "spend" their points on services of their choosing

24%

## None of the Above



# Are you facilitating an upfront consultation with the employee to understand their individual circumstances and needs before their assignment/transfer? (SELECT ALL THAT APPLY)

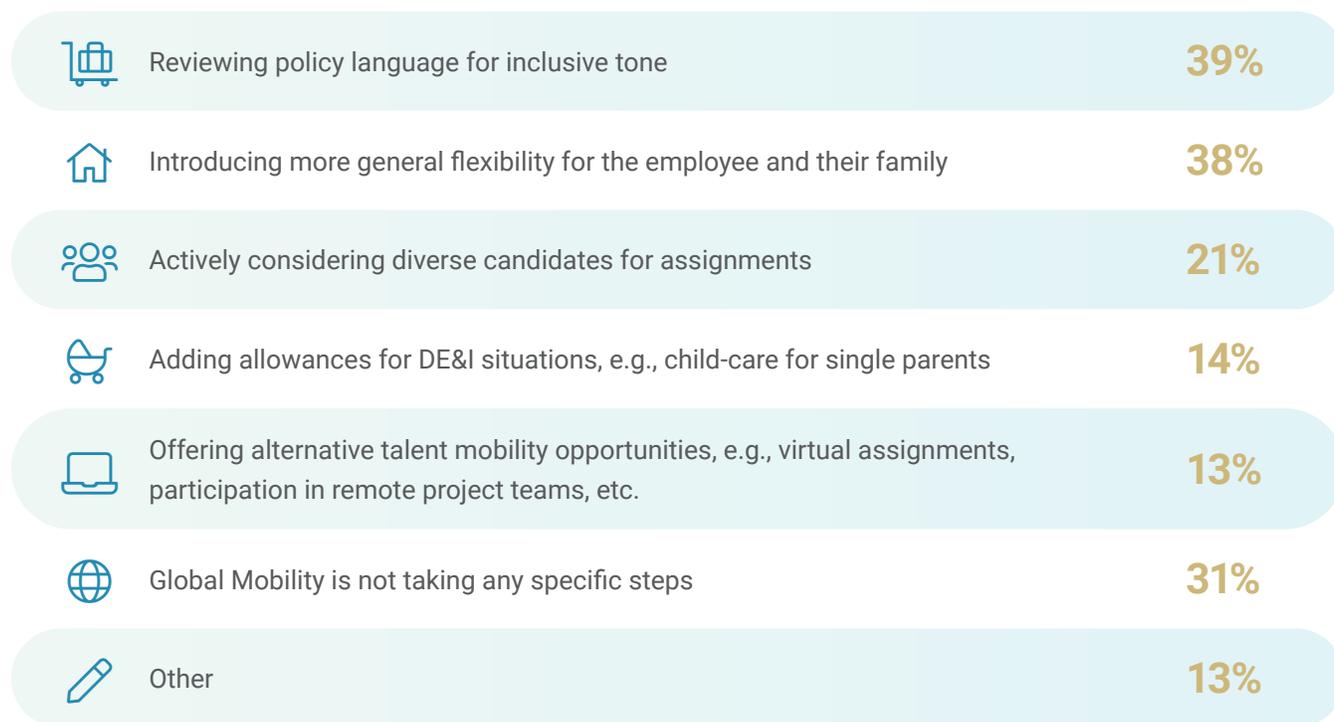


“ We are currently looking to roll out employee flex in 2022 and more cashed-out allowances.”  
- EUROPE-BASED CONSUMER GOODS COMPANY



Thirty-eight percent of companies reported that they were increasing employee flexibility in order to promote diversity, equity, and inclusion (DE&I). Meanwhile, 39% of companies are reviewing their policy language for inclusivity. Though these are valuable initiatives, **the highest impact on DE&I may come from partnering with the business and Talent to improve the diversity of mobility candidates** – only 21% of companies are doing this today. In addition to DE&I, Mobility is also asked to meet corporate sustainability objectives. This survey tells us that the most common way Mobility achieves this is by partnering with vendors committed to environmentally and socially sustainable operations.

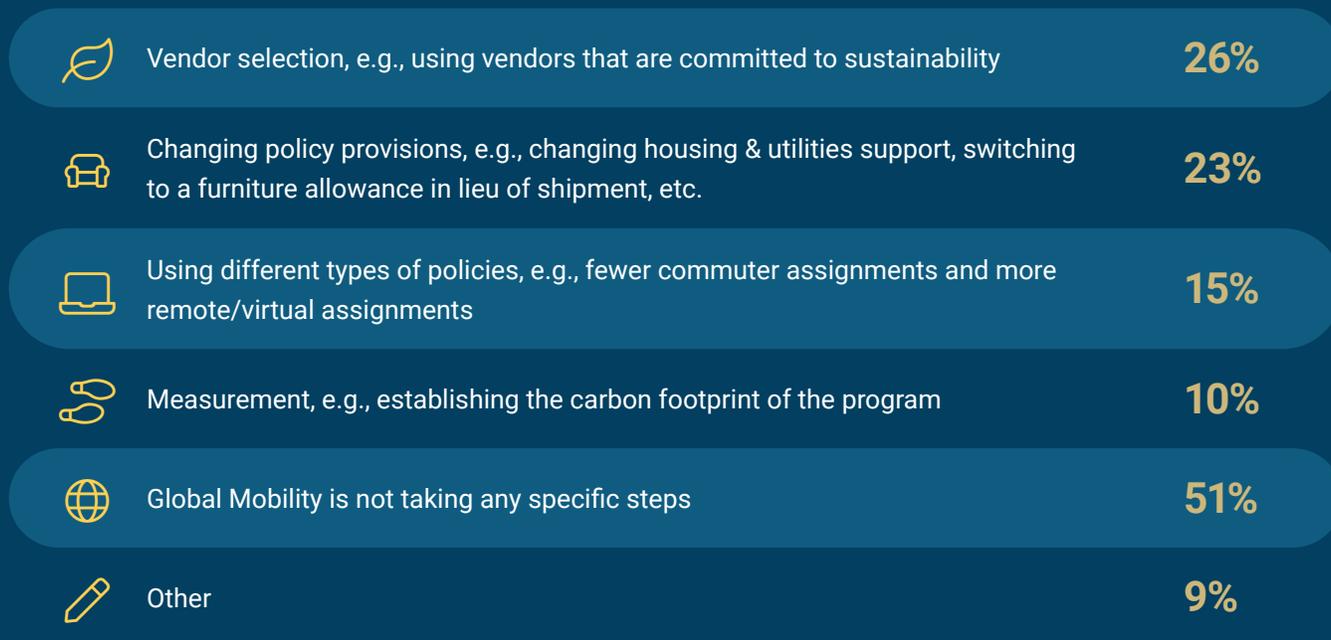
## Is your Global Mobility program taking any steps to promote DE&I? (SELECT ALL THAT APPLY)



We assess needs by assignee and modify benefits to fit needs (e.g., child care has been offered when both parents work.)”

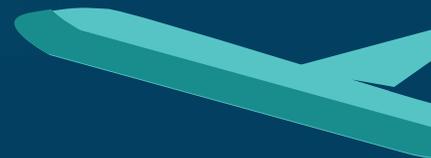
– NORTH AMERICA-BASED OIL & GAS COMPANY

# Is your Global Mobility program taking any steps to promote sustainability? (SELECT ALL THAT APPLY)



We are creating new travel guidelines and tools for our people, enabling them to make responsible and climate-smart travel decisions. This includes an Aviation Carbon Calculator which allows travelers to view the specific carbon footprint for any direct flight.”

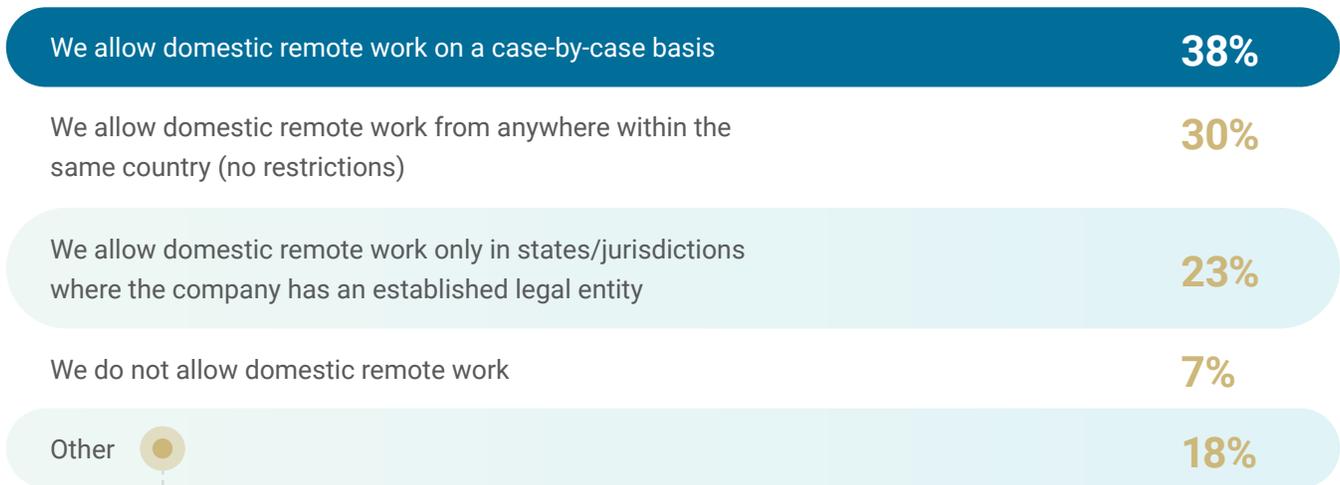
– EUROPE-BASED PROFESSIONAL SERVICES COMPANY



**Today, 90% of companies support some level of remote work.** For those that do, Mobility is likely to play a part in defining the organization's remote work policy or process, especially for international arrangements. For companies able and willing to offer it, remote work now features as a key piece of the employee value proposition.

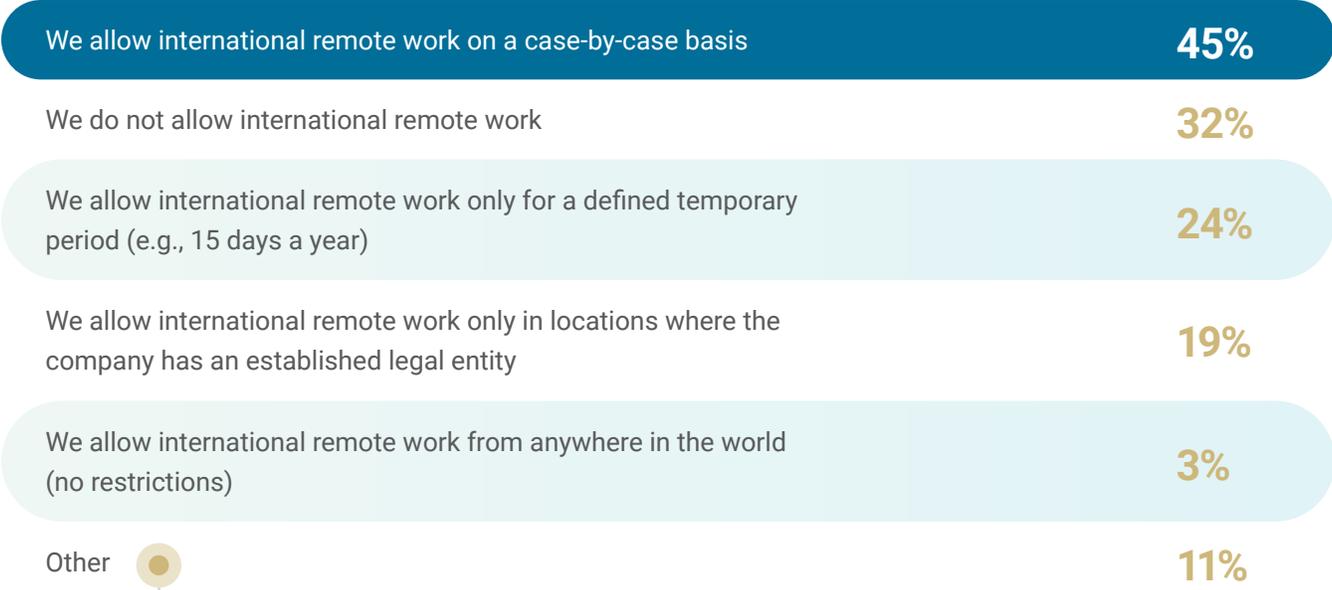


## Does your company allow domestic remote working for eligible employees? (SELECT ALL THAT APPLY)

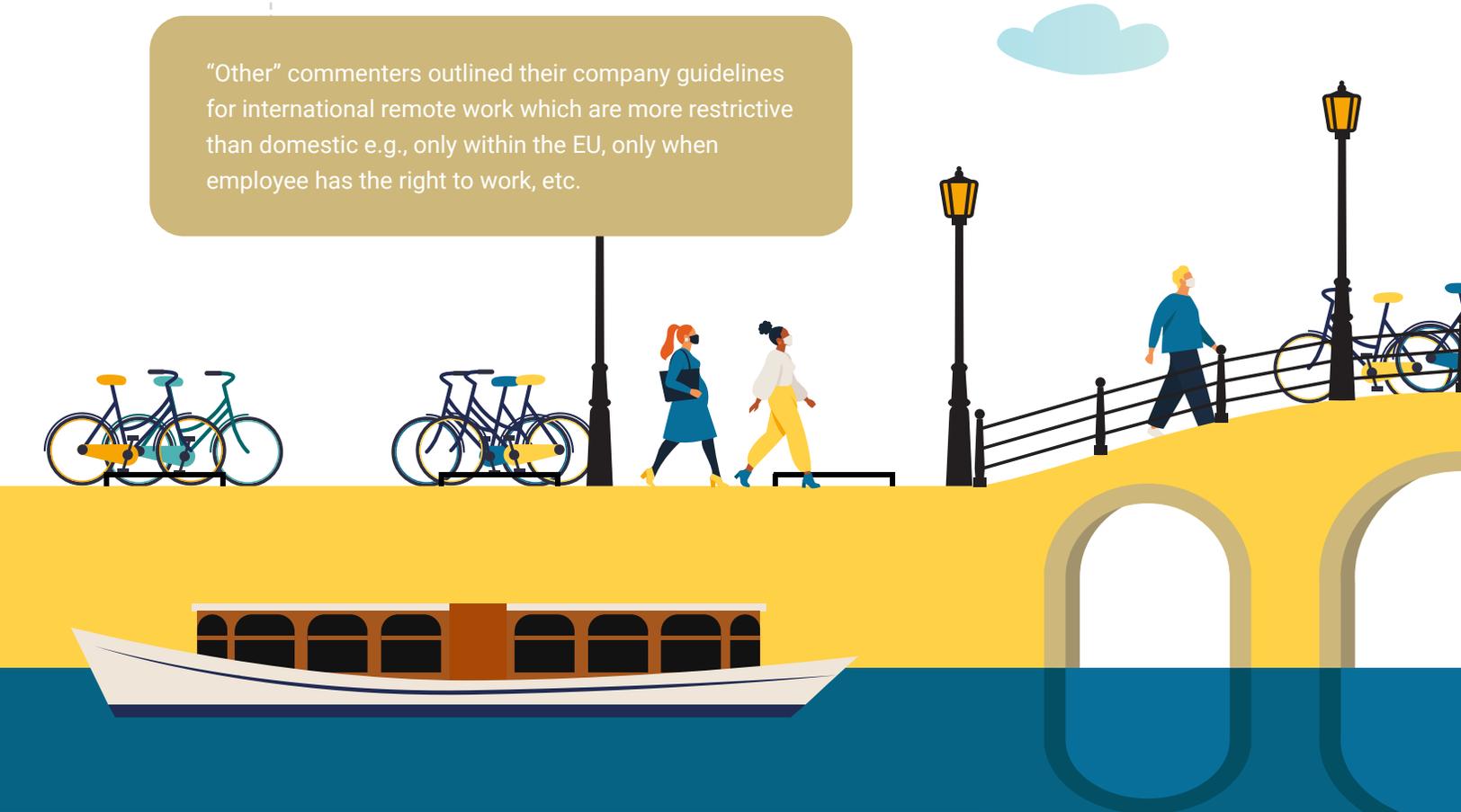


"Other" commenters outlined their company restrictions for domestic remote work like 1 or 2 day per week limits, pre-approval requirements, and reviewing tax jurisdiction consequences, etc.

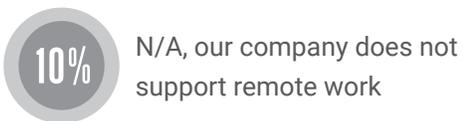
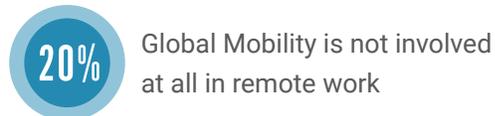
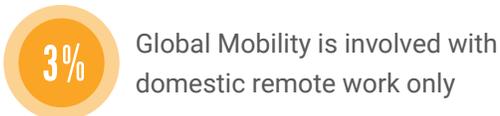
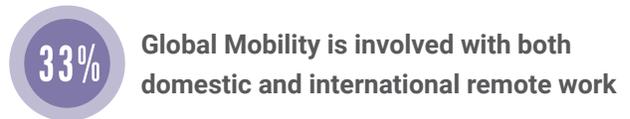
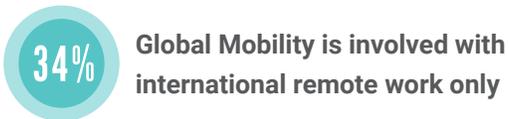
# Does your company allow international remote working for eligible employees? (SELECT ALL THAT APPLY)



“Other” commenters outlined their company guidelines for international remote work which are more restrictive than domestic e.g., only within the EU, only when employee has the right to work, etc.



# In which aspects of remote work is Global Mobility currently involved?

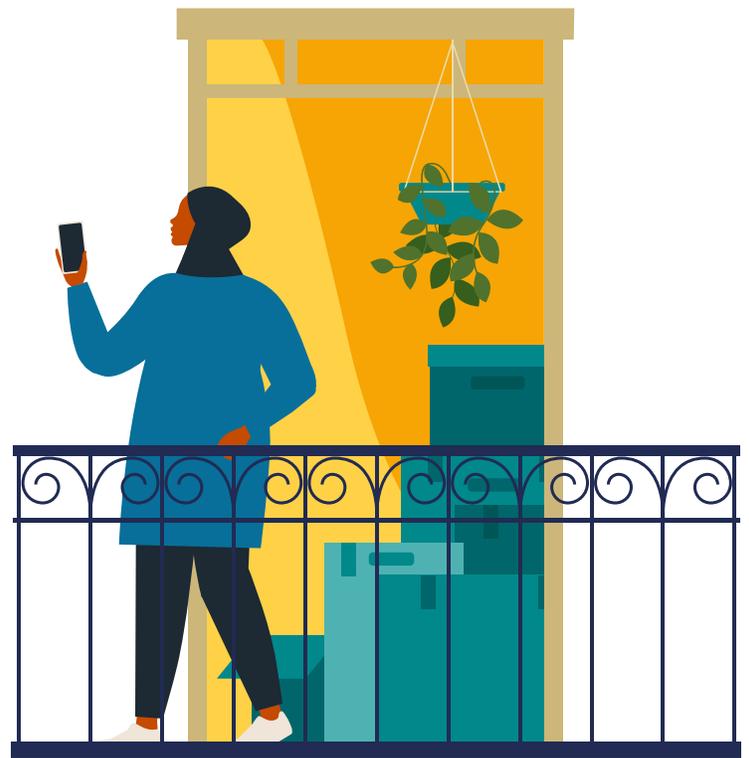


Our main focus for 2022 is international remote workers. Our goal is to build the overall framework, create a standardized policy, and have technology in place to manage better compliance risk associated with remote work abroad.”

– EUROPE-BASED FINANCIAL SERVICES COMPANY



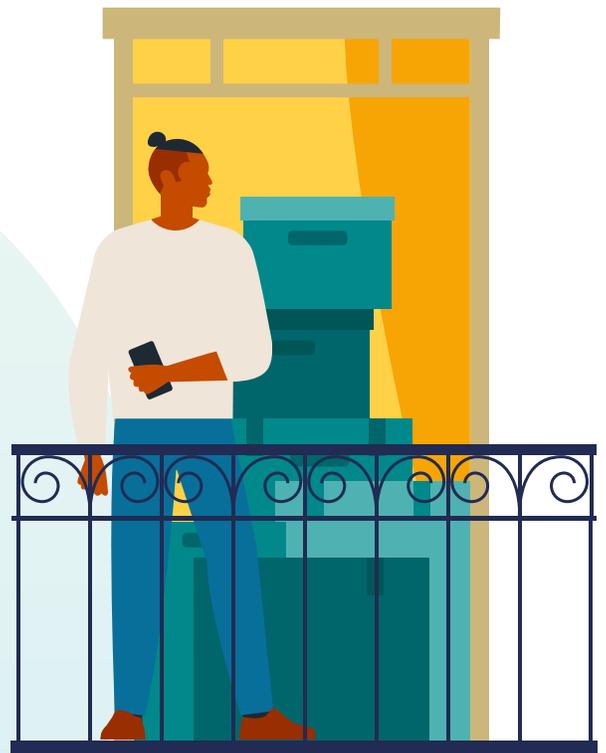
**Most participants in this year's survey support high-volume Mobility programs.** Among respondents, the average number of temporary international assignments per year is 259. In addition, they average 156 international permanent transfers on an annual basis. **Fifty-seven percent of companies expect their move volume to increase in 2022.** When it does, Global Mobility will be prepared with the greatest number of policies available to facilitate these moves since AIRINC began this survey a decade ago. Policy suite growth is attributed to many factors including diversifying work forces, business flexibility, and creative solutions to compliance and travel challenges.



“

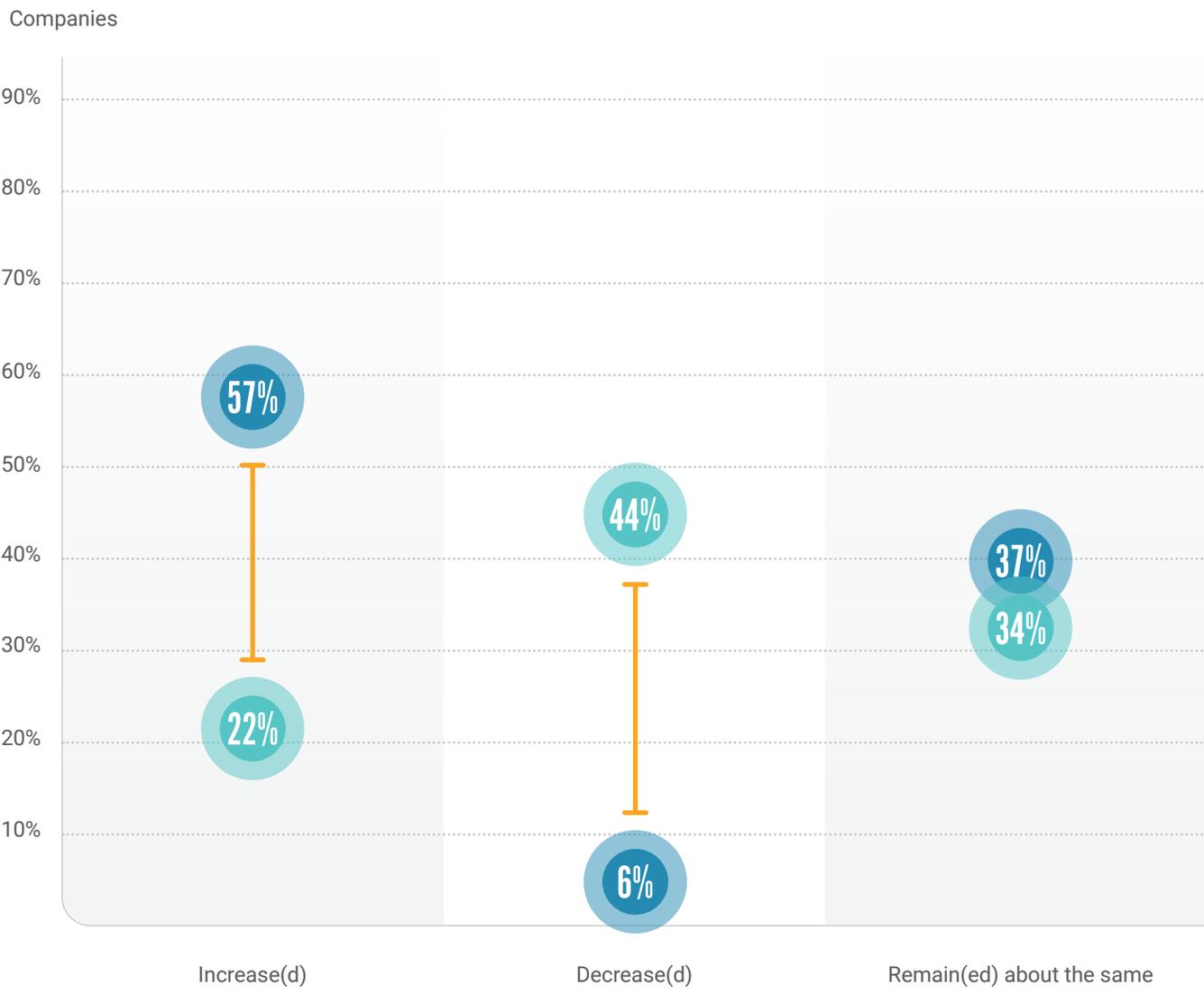
I expect 2022 will bring increased volume in mobility as travel restrictions ease. I also expect that companies will recognize that business travelers need to be better monitored and Mobility is well placed to do this, which will bring additional scope and exposure for Mobility.”

– NORTH AMERICA-BASED CONSUMER GOODS COMPANY

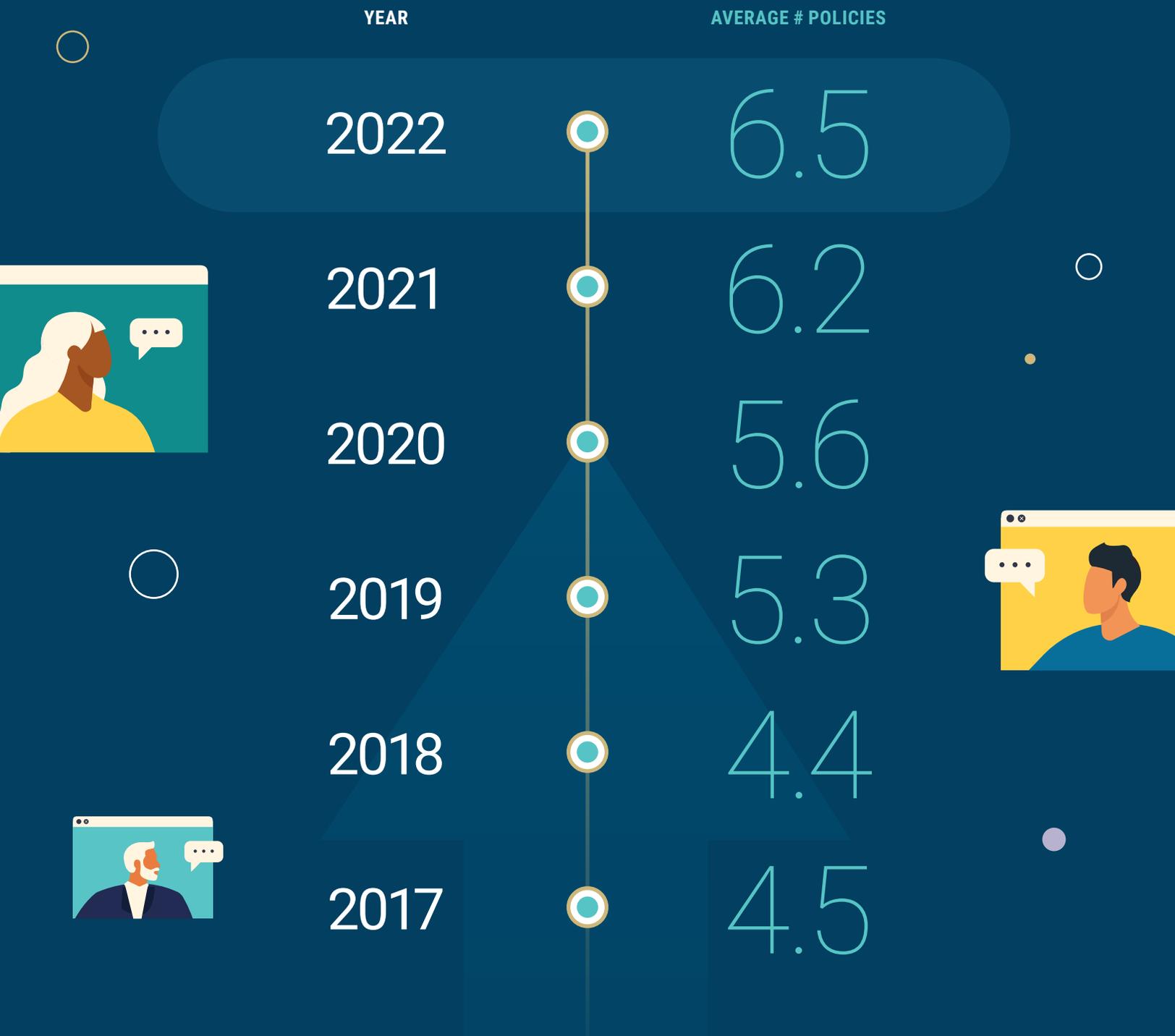


# Describe the volume of Global Mobility activity (assignment, transfers, etc.) at your company.

Key:  The past year  Expectation in the upcoming year



## Average number of policies in the Global Mobility suite since 2017



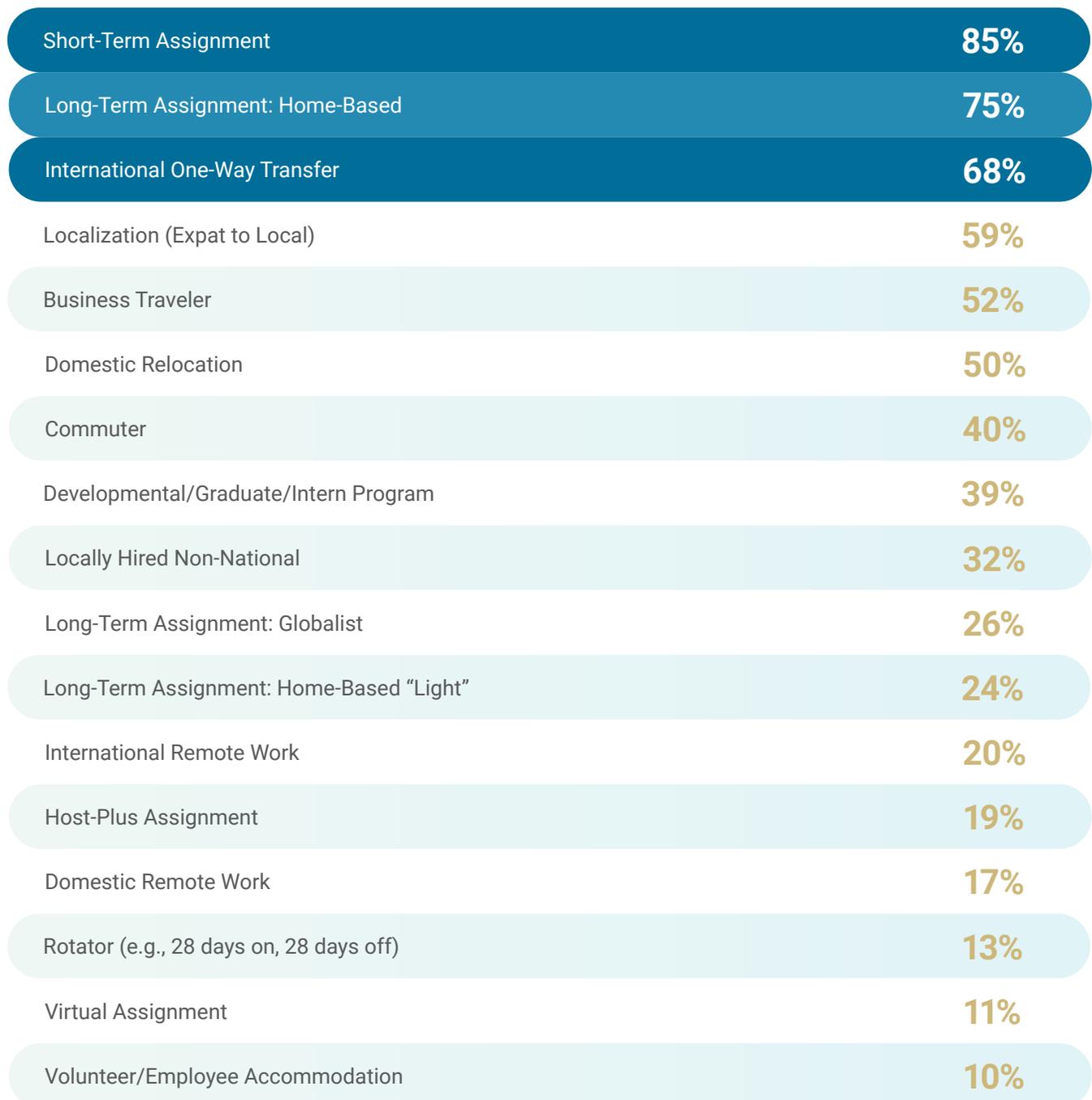
We hope to build a policy regarding virtual assignments and international remote work.”

– EUROPE-BASED CONSUMER GOODS COMPANY

### Traditional Long-Term and Short-Term Assignment policies remain prevalent in Global Mobility suites.

However, confirming the findings of our previous two surveys, the top three earmarked for growth are again International Permanent Transfer, Business Travel, and Short-Term Assignment. Given the anticipated growth in move volume, and the emphasis Mobility places on flexibility and choice, many other policy types beyond the three named above will also see increased usage.

## What policies do you currently have in your cross-border mobility suite? (SELECT ALL THAT APPLY)



# Regarding policy usage, what is your expectation for the coming year?



**USAGE WILL INCREASE**



**USAGE WILL DECREASE**



**USAGE WILL REMAIN THE SAME**

International One-Way Transfer	50%	3%	29%
Business Traveler	46%	8%	23%
Short-Term Assignment	46%	6%	41%
International Remote Work	35%	1%	13%
Domestic Remote Work	32%	2%	14%
Long-Term Assignment: Home-Based	31%	10%	41%
Commuter	29%	5%	33%
Developmental/Graduate/Intern Program	28%	4%	34%
Localization (Expatriate to Local)	26%	2%	48%
Domestic Relocation	26%	4%	41%
Virtual Assignment	25%	1%	10%
Locally Hired Non-National	23%	1%	19%
Long-Term Assignment: Home-Based "Light"	20%	2%	19%
Host-Plus Assignment	18%	1%	19%
Long-Term Assignment: Globalist	17%	4%	25%
Volunteer/Employee Accommodation	11%	2%	8%
Rotator (e.g., 28 days on, 28 days off)	5%	2%	22%



## For Mobility, the year ahead is full of promise.

Opportunities lie in tailoring programs and partnerships to enable the recruitment and retention of top talent, providing greater business and employee flexibility, and investing in technology to make it all possible. During the compliance marathon of the past two years, **Global Mobility has displayed true grit and ingenuity navigating uncertainty to deliver more organizational value than ever before.** Their contributions made to remote work alone will shape corporate employee value propositions for years to come. The investments that Mobility is making in 2022, from increasing its advisory capability, to growing team headcounts, and pursuing new outsourcing arrangements will push the function to the partnership status it has earned.

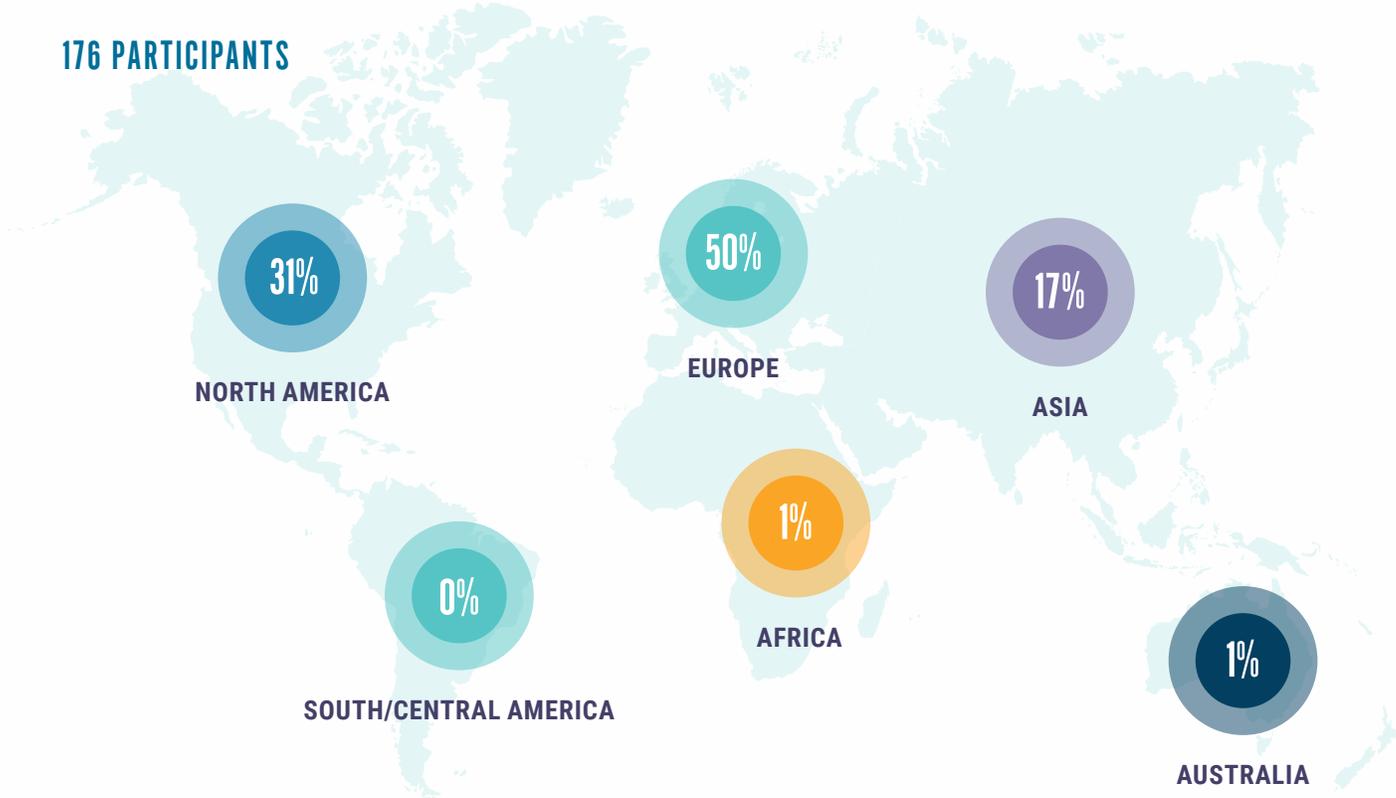


Assignee numbers dropped 70% during COVID-19 but should start up again soon. Virtual assignments are a new addition which we may continue.”

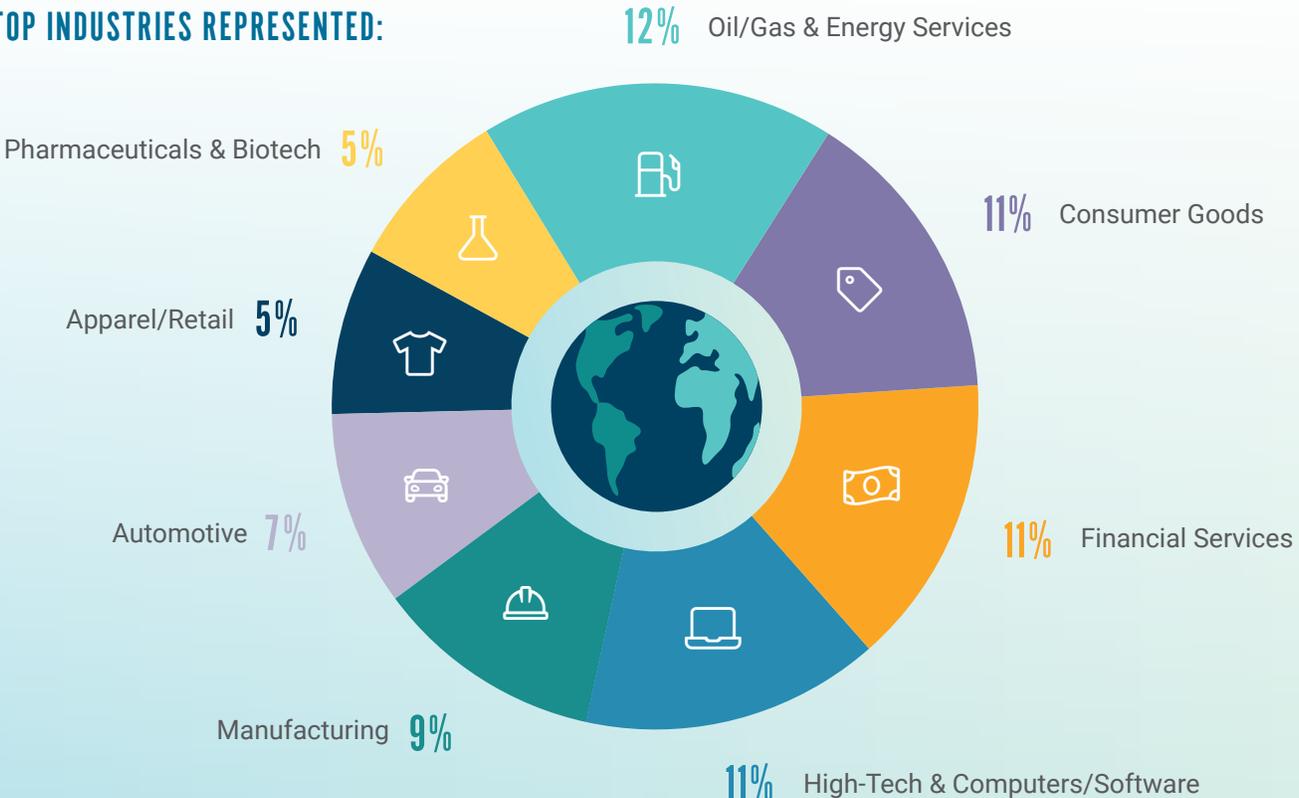
– EUROPE-BASED FINANCIAL SERVICES COMPANY

# Report Demographics

176 PARTICIPANTS



## TOP INDUSTRIES REPRESENTED:



# Partial list of participating companies:

Accenture	Deutsche Telekom AG	L'Occitane International	Schindler
Adeo	DFS Group	Lockheed Martin	Schlumberger
Alfa Laval	Dow	Lowe's Companies, Inc.	Schneider Electric
Alstom	Ecolab	Lufthansa	SETEC
Amcors Rigid Packaging	Engie	Mandarin Oriental Hotel Group	Shell
Aon	Equinor ASA	MediaCom	Solvay
ARaymond	Expedia	MICHELIN	Stanley Consultants
ARC	ExxonMobil	Micron Technology Inc	Swiss Re
Arup	Ferrero International	MOL Plc.	TC Management Services Corporation Sdn. Bhd.
ASMPT	Ferring Pharmaceuticals	Morgan Stanley	TDK Corporation
Baker Hughes	Fidelity International	National University of Singapore (NUS)	Teijin Limited
Bank of Singapore	Financial Times	Nike	Tetra Pak
BAT	Ford Motor Company	NOV, Inc.	Thales
BDO	General Mills	Ocado Group PLC	The Clorox Company
Beam Suntory Inc.	General Motors	Oil Search	The Coca-Cola Company
Bekaert	GROUPE BEL	OMV	The Walt Disney Company
BIC	Groupe Renault	Onet	TIBCO
bioMérieux	HAIER GROUP	PACCAR Inc	Uber Technologies Inc
BMW Group	HGC Global Communications Limited	Peloton	UBS
BNP Paribas	HP	Perenti	UCB
Boeing	IADB	PETRONAS	UEM Sunrise Bhd
BorgWarner Inc	IBM	Philip Morris International	Unilever
BP	IMS Nanofabrication GmbH	Primark	Unity Technologies
CFAO	Inter IKEA	QIAGEN	UOB Limited
Champion X	International Flavors & Fragrances	Reckitt plc	Valero
CICCHK	Jaguar Land Rover	Repsol	Varian
Commerzbank AG	Kellogg	Richemont International SA	Veritas Technologies
ConocoPhillips	Kreditanstalt für Wiederaufbau	Rio Tinto	Viatis
Daimler AG	Krones AG	Roche	Volkswagen AG
Danish Crown Group	KWS	Saint-Gobain	Welltec A/S
Dassault Systemes	LIMAGRAIN	Salesforce	
DB Engineering & Consulting GmbH	Link REIT	Sapura Energy Berhad	
Dell Technologies		SC Johnson	



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