

Mobility Outlook Survey





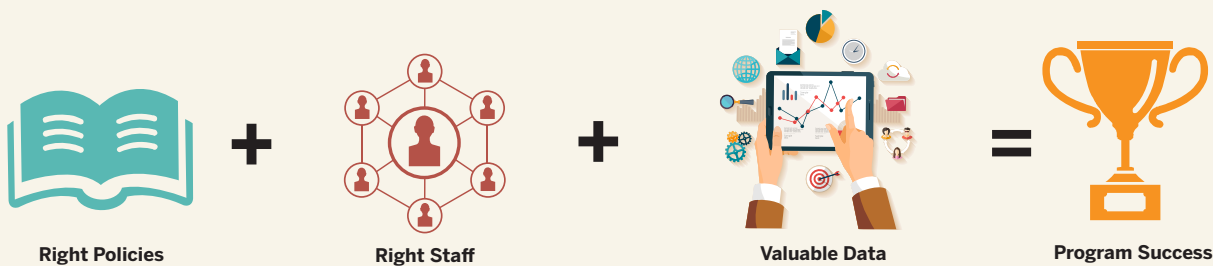
2017 Mobility Outlook Survey

Global Mobility is experiencing an unprecedented level of change. This year's survey reveals that Mobility functions are managing a greater variety of cross-border movement than ever before. The term "expat" now seems inadequate to describe the range of assignment and transfer types gaining traction today. Localizations, indefinite transfers, extended business travel; these are all examples of the alternative approaches Mobility is leveraging to deploy talent around the globe. The business is asking for flexibility, and Mobility is responding. This is an opportunity for Mobility to shine, through planning and action.

Collaborating with the business has required Mobility to adopt a business outlook and add policies, skills, and capabilities. These adjustments have increased Mobility's responsibilities and changed the

expectations of Mobility's role within the organization. The foundation for this expanded suite of policies and services is thoughtful planning and well-executed operations. ***The hallmarks of best-in-class mobility today are having the right policies, employing the right staff, and collecting valuable data to track the function's performance and progress.***

This year's survey results introduce trends in measuring Mobility's performance and report on the evolution of key program features. The study will also explore Mobility's progress on aligning to talent, meeting business needs, and the always-important fulfilling of operational aspects of the job.



"While our volumes have decreased somewhat, our scope has increased. Global Mobility now owns immigration for the entire organization, including for local hires and international transfers, through a center of excellence approach. We also own immigration and tax risk for all business travelers."

- Financial Services Participant



The Promise of Performance

As business needs evolve, Mobility's definition of success changes. Whether Mobility is tasked with reducing costs or improving the attractiveness of assignments, data can help the function report on its progress and successes. Metrics help Mobility monitor program costs, identify areas for improvement, and quantify the relationship between mobility and career growth. Ultimately, Mobility can use data

to advise the business and organization on best practices. Though most see its value, the majority of companies are not currently utilizing metrics in their programs. Forty-six percent of companies indicate that they are looking to add metrics to their capabilities. This is one of the largest opportunities for Mobility today because it can help the function vividly communicate the success of its program and track investment in cross-border activity.

Is your company using analytics to help report on the success of your assignment program?



Overall



Oil & Gas



Pharma



Consumer Goods



Financial Services



High Tech

Yes, we regularly use analytics to report on success

19%	33%	0%	21%	25%	15%
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Yes, we occasionally use analytics to report on success

22%	14%	29%	29%	35%	38%
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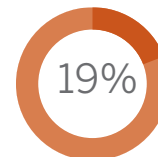
No, but we are looking to add analytics to our capabilities

46%	29%	57%	50%	30%	31%
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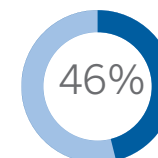
No, we are not using nor considering adding analytics to report on assignment success

13%	24%	14%	0%	10%	15%
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Companies regularly using metrics



Companies looking to add metrics



Today, metrics are mostly used to gather short-term data relevant to active assignments such as assignee satisfaction and job performance during the assignment. Few companies measure long-term success indicators like job performance ratings or promotions *after* an assignment is completed. The latter metrics accumulate over time resulting in a rich database of information which can demonstrate the organizational value of investing in mobility. It is these longer term metrics which can also help the company see their return on investment.

What do you use to measure assignment success?



Overall



Oil & Gas



Pharma



Consumer Goods



Financial Services



High Tech

N/A, we do not measure assignment success

41%	43%	71%	29%	28%	8%
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Retention rate after assignment ends

29%	10%	14%	43%	39%	54%
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Job performance rating during assignment

26%	33%	14%	43%	33%	38%
-----	-----	-----	-----	-----	-----

Job performance rating after assignment

14%	29%	14%	7%	28%	8%
-----	-----	-----	----	-----	----

Job promotion(s) during assignment

16%	24%	0%	21%	28%	8%
-----	-----	----	-----	-----	----

Job promotion(s) after assignment

19%	24%	14%	7%	28%	23%
-----	-----	-----	----	-----	-----

Assignee satisfaction survey during assignment

35%	24%	14%	43%	50%	62%
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Assignee satisfaction survey after assignment

28%	19%	0%	21%	33%	54%
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59%







of companies measure some aspects of assignment success









Interestingly, an average of only 31% of companies track retention rates after repatriation. This may be due to technology limitations (e.g., Mobility and HR applications which do not communicate). Or, it could be that repatriated employees fall off Mobility's radar as they are absorbed back into the general population. Not tracking the success of these individuals over time is a missed opportunity to capture mobility's long-term value and importance within the organization. Retention can be improved, though

it requires Mobility to partner with the business and other supporting functions, such as Talent Management. However, the survey finds that Mobility rarely or only sometimes communicates with Talent. There is room for improvement in this area; a strong communication channel benefits both functions. Together, Mobility and Talent can more thoughtfully plan assignments and establish a structure that supports employees in the short and long term.

Do you track retention rate after repatriation?

	 Overall	 Oil & Gas	 Pharma	 Consumer Goods	 Financial Services	 High Tech
Yes	31%	33%	14%	36%	45%	33%
No	69%	67%	86%	64%	55%	67%

Does your company utilize any of the following tools to help ensure a successful reintegration after the assignment ends?

	 Overall	 Oil & Gas	 Pharma	 Consumer Goods	 Financial Services	 High Tech
Formal communication of job role after repatriation	29%	29%	29%	36%	30%	23%
Mentor program after repatriation	3%	10%	0%	7%	5%	0%
Reintegration services	21%	24%	14%	21%	35%	0%
Assignee satisfaction survey after repatriation	23%	29%	0%	21%	25%	38%
N/A, we don't utilize any tools to ensure a successful reintegration	44%	43%	57%	36%	40%	38%

only
31%
of companies track retention rates after repatriation

56%

of companies utilize tools to facilitate successful reintegration of assignees



Mobility is not regularly speaking with:

Talent Management or Senior Management

Companies indicate that Mobility sometimes communicates with key business and organizational stakeholders and AIR-INC is tracking this metric each year to see if the frequency of coordination increases. Since last year, there have been no significant changes to the frequency of communications between Mobility and the stakeholders listed below.

How often does Global Mobility communicate with the following stakeholders within your organization?

	2017	2016
The Assignee	3.9	3.9
HR	4.4	4.4
Host Business Unit	3.4	3.6
Talent Management	2.6	2.9
Senior Leadership	3.2	3.3

KEY 1= NEVER | 2= RARELY | 3= SOMETIMES | 4= OFTEN | 5= ALWAYS












Containing Cost

While estimating assignment costs is common practice, 47% of companies do not regularly compare those estimates against actual assignment costs. Companies that compare estimated and actual assignment cost data over time can improve the accuracy of their future estimates. Cost accuracy helps Mobility confidently report on program costs and reinforce credibility with the business.

47%











of companies are not comparing estimated and actual assignment costs

Do you measure the actual cost versus estimated cost for international assignments?

	 Overall	 Oil & Gas	 Pharma	 Consumer Goods	 Financial Services	 High Tech	 Asia Pacific	 Europe	 North America
Yes, for all assignments	23%	10%	29%	14%	16%	15%	14%	14%	31%
Case by case basis	29%	33%	14%	29%	32%	46%	50%	36%	23%
No	47%	57%	57%	57%	53%	38%	36%	50%	46%

Sixty-one percent of companies agree that cost containment is always a high priority for Mobility. Last year, 38% of companies stated that Mobility was under pressure to reduce costs. That figure is down to 31% this year. Segmenting by industry provides some interesting contrasts. For example, 62% of oil and gas companies reported pressure to reduce costs, while only 23% of high tech companies reported the same. The high tech industry is one of the newest in the group, benefiting from a growing and eager-to-travel employee population. Mobility policies for high tech companies are often significantly leaner than those of companies in other industry sectors, so the small appetite for cost reductions in the technology industry makes sense; they already have cost-effective approaches.

Is Global Mobility under pressure to reduce costs?

	 Overall 2016	 Overall 2017	 Oil & Gas	 Pharma	 Consumer Goods	 Financial Services	 High Tech	 Asia Pacific	 Europe	 North America
Cost containment is a high priority for Global Mobility right now	38%	31%	62%	0%	36%	30%	23%	14%	37%	31%
Cost containment is always an issue for Global Mobility but there isn't an increased focus on it at this time	56%	61%	38%	71%	57%	55%	77%	71%	56%	61%
Cost containment is not an issue for Global Mobility right now	6%	8%	0%	29%	7%	15%	0%	14%	7%	8%

When tasked with reducing costs, Mobility first looks internally at streamlining operations, before seeking to develop alternate policy types, administering fewer assignments, or reducing benefits. Sixty-three percent of companies reported that they try to streamline operations when there is cost pressure, which is up from 59% last year. The biggest change from last year though, is the increased use of one-way international transfers. This year, 47% of companies reported using this approach to reduce program costs, which represents a 20% increase over last year.

The caveat with this statistic is that not all one-way international transfers are created equal. Transfer policies sometimes provide only relocation and some tax support but may also offer temporary benefits (like education) or maintain the employee's home country retirement benefits. Traditionally, one-way transfers involved moving employees

to host country compensation and benefits with no ongoing assignment allowances (like COLA and housing) because they were intended to be permanent relocations. Today, this host-based model is used for some temporary assignments and works best when there is a high level of affinity between the home and host locations. Temporary host-based assignments can be cost saving when both the company and the assignee benefit from a host orientation (e.g., moves into high wage and low tax locations). However, it's important to use this approach with prudence since one-way transfers may not be effective into countries with less desirable wage and tax configurations, particularly if future mobility is planned.

47%

of companies are deploying more one way transfers to reduce costs

How has Global Mobility been reacting to the pressure to reduce costs?







Overall 2017	Oil & Gas	Pharma	Consumer Goods	Financial Services	High Tech	Asia Pacific	Europe	North America
63%	Gaining operational efficiencies							
	76%	33%	86%	50%	67%	64%	74%	58%
34%	Use of new technologies							
	43%	17%	57%	25%	50%	14%	60%	23%
33%	Reducing expatriate benefits/allowances							
	62%	17%	43%	35%	33%	43%	26%	35%
42%	Sending fewer expatriates							
	76%	0%	29%	45%	58%	36%	30%	52%
13%	More host-based assignments							
	5%	17%	14%	30%	8%	7%	21%	10%
47%	More one-way international transfers in lieu of temporary expatriate assignments							
	29%	17%	50%	70%	100%	14%	42%	58%
25%	Increased use of developmental policy(ies)							
	14%	0%	29%	45%	25%	43%	23%	23%



Resourcing Mobility

Fifty-eight percent of companies report that their Mobility functions report into Human Resources while 35% report into Compensation and Benefits. These two reporting relationships reinforce Mobility's focus on operational aspects. To be operationally efficient, Mobility has to staff the function with the right professionals. The skillsets needed are unique to each program and depend on Mobility's role within the organization.










Under which department does Global Mobility fall within your organization?

	 Overall 2017	 Oil & Gas	 Pharma	 Consumer Goods	 Financial Services	 High Tech
Human Resources	58%	76%	14%	43%	50%	62%
Compensation and Benefits	35%	19%	86%	36%	40%	31%
Talent	2%	0%	0%	7%	0%	0%
Other	5%	5%	0%	14%	10%	8%

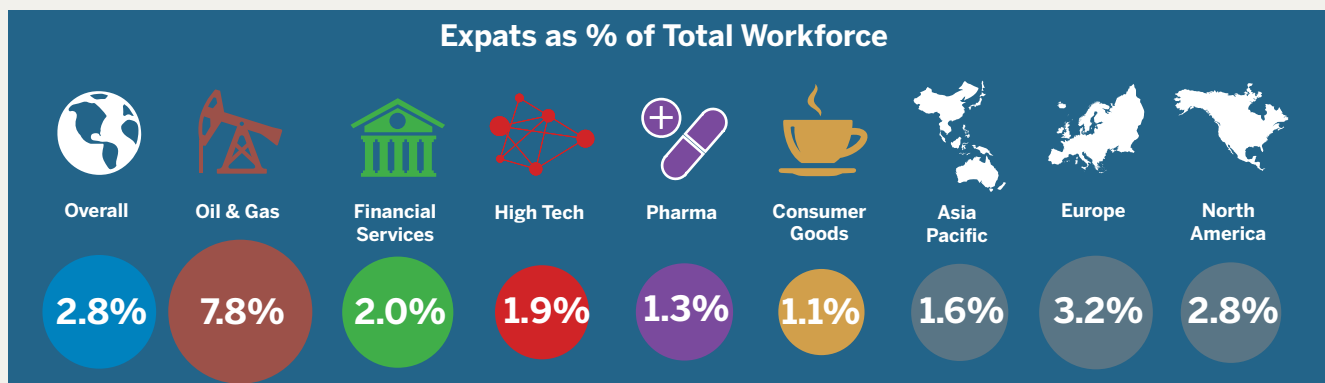
Most companies centralize Mobility (or key parts of it) to ensure global governance and a consistent standard of service. Forty-seven percent of companies fully centralize Mobility while another 47% centralize some elements of Mobility and decentralize others. Centralized and partially-centralized models help streamline common tasks and gain efficiencies. Only 6% of all companies have fully decentralized Mobility functions.

94%
of mobility functions are centralized or somewhat centralized

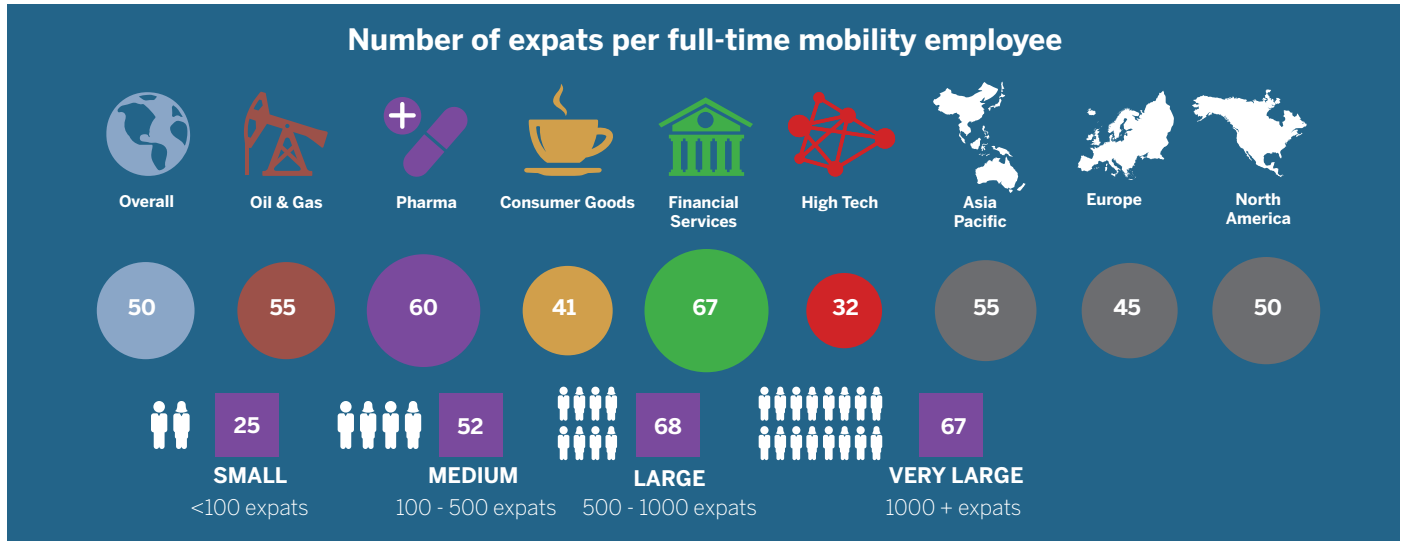
Please describe your company's general organizational model for the Global Mobility function:

	 Overall	 Oil & Gas	 Pharma	 Consumer Goods	 Financial Services	 High Tech	 Asia Pacific	 Europe	 North America
Fully centralized	47%	43%	57%	50%	50%	69%	43%	50%	48%
Partially centralized	47%	57%	29%	43%	40%	23%	43%	40%	49%
Fully decentralized	6%	0%	14%	7%	10%	8%	14%	10%	3%

In general, expatriates comprise only 2.8% of a company's total workforce. However, that ratio varies by industry. In oil and gas, expatriates comprise 7.8% of the total workforce, while in consumer goods, they are only 1.1% of the total employee headcount. On a regional basis, European companies have a higher than average ratio of expatriates in their workforce than companies based in North America or Asia Pacific.






While the overall percentage of expatriates is relatively small within a company, the complexities of this population generate the need for dedicated staff. Generally, for every 50 expatriates, there is one dedicated Mobility resource. However, this ratio does vary. For example, companies with large cross-border populations show ratios of between 66 and 68 expatriates per full time Mobility employee (FTE). There is some variance by industry and region as well. For financial services companies, the ratio is 1 Mobility FTE per 66 expatriates, while high tech companies report 1 Mobility FTE per 31 expatriates. From a regional perspective, Mobility functions in the Asia Pacific region manage the greatest number of expatriates: 55 per FTE. European companies manage the fewest: 45 expatriates per FTE.



Considering the varied skillsets needed to run a successful function, Mobility can improve operational efficiency by striking the right balance of insourcing and outsourcing tasks. Certain key Mobility tasks, especially those of an advisory nature, are most commonly insourced. These tasks may include developing and maintaining policy, and managing the relationship with the business. Transactional tasks such as relocation and tax management are more likely to be outsourced to professional firms, though a substantial number of Mobility functions share responsibility of these tasks with vendors (co-sourcing): 36% and 52%, respectively. Survey data suggests that program size is not an indicator of whether a company will insource or outsource various tasks.

Please indicate which of the following functions are insourced, co-sourced, or outsourced by your Global Mobility Program

	OVERALL				SMALL/MEDIUM		LARGE/XL	
					 <500 expats		 >500 expats	
	In-House Corporate Function	In-House Shared Service Function	Co-sourced with a Vendor	Outsourced	In-House	Co-sourced or Outsourced	In-House	Co-sourced or Outsourced
Policy	91%	3%	5%	2%	90%	10%	100%	0%
Tax	4%	2%	52%	43%	5%	95%	6%	94%
Immigration	3%	3%	54%	40%	4%	96%	8%	92%
Relocation Services	23%	23%	10%	29%	11%	89%	6%	94%
Preparation of expat comp statements	42%	15%	16%	27%	51%	49%	68%	32%
Payroll	30%	33%	34%	3%	66%	34%	58%	42%
Relationship with Assignee	40%	20%	34%	6%	59%	41%	62%	38%
Relationship with Business	72%	19%	8%	1%	92%	8%	90%	10%
Expense management and tracking	29%	21%	33%	16%	52%	48%	49%	51%
Full assignment services delivery	29%	13%	40%	18%	40%	60%	47%	53%



Usually Insourced

- Policy
- Relationship with the business
- Payroll
- Relationship with the assignee
- Preparation of expat comp statements



Usually Outsourced

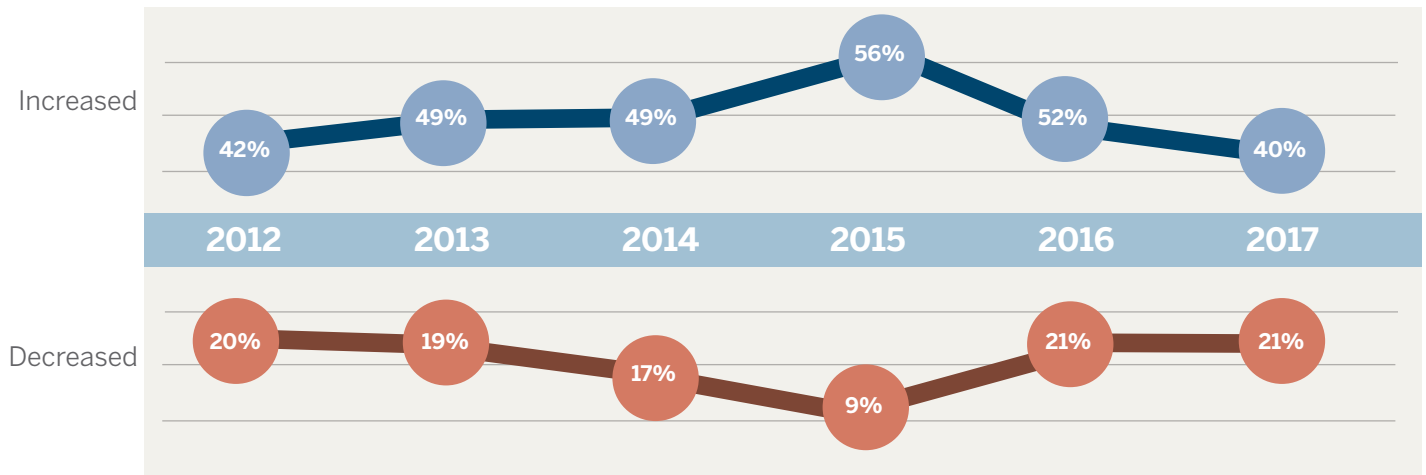
- Tax
- Immigration
- Relocation



Mobility Growth and its Impact on Policy

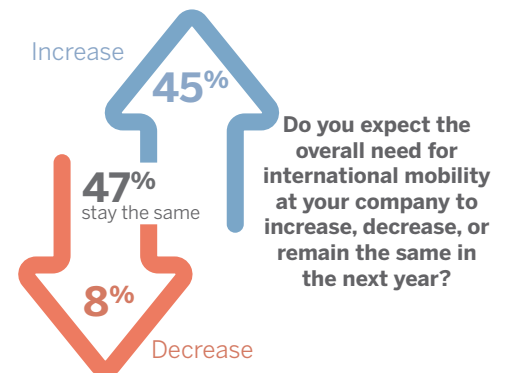
Eighty percent of companies reported a stable or growing need for international mobility over the past year. It's important to clarify that, for this question, the definition of mobility includes all types of cross-border activity – assignments (home- and host-based; long and short), transfers, non-national hires, and business travel.

Has the overall need for international mobility at your company increased, decreased, or remained the same in the past year?

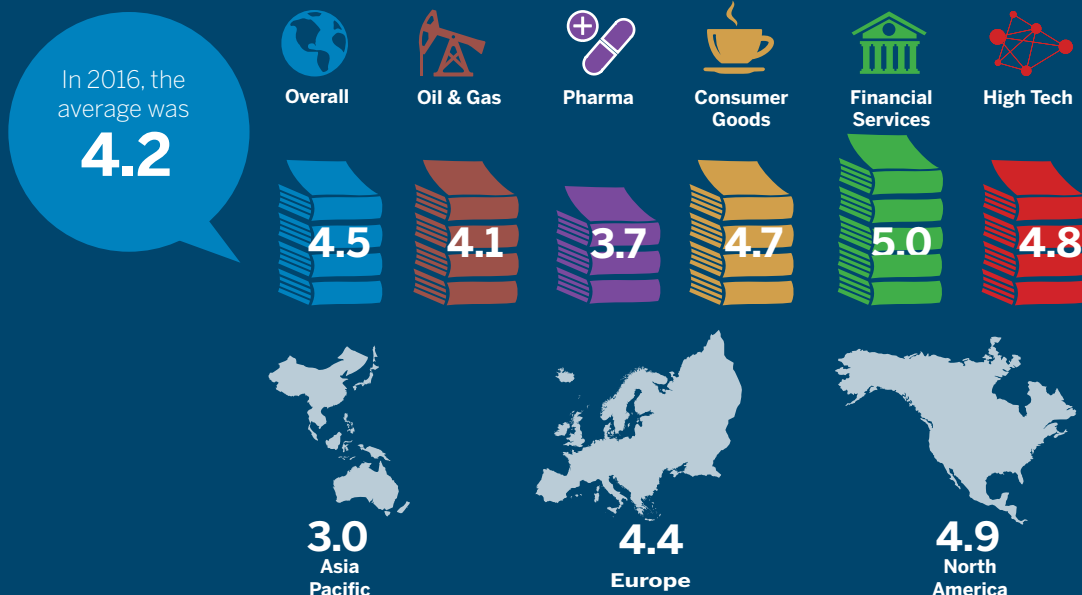


Looking ahead to the upcoming year, 92% of companies anticipate a growing or stable need for international mobility. Only 8% anticipate a decreased need for international mobility in the upcoming year.

On average, Mobility manages 4.5 policies today. This is up from last year's average of 4.2 policies as companies have added to their suite to satisfy changing business needs. Regionally, European companies saw the greatest increase in their policy inventories. Europe's policy average was 3.8 last year compared to this year's 4.4 indicating increased diversification in the region.



How many policies do you have?



This year's policy inventory confirms the most common policies include Short-Term (94%), Long-Term, Home-Based (87%), and International One-Way Transfers (64%), with the smallest number of firms reporting Host (no plus) (8%) and Volunteer policies (12%). However, a significant minority of respondents indicated they are seeking to add policies, and this data provides a preview of how mobility will shift in the near future. For example, 22% of all companies are considering adding a Commuter policy. Commuter arrangements are a way to address assignments into challenging locations or minimize family disruption and spousal income loss. Companies may be adding Commuter assignments as a way to enhance mobility in a cost-effective manner.

Twenty-one percent of companies are considering adding a Locally Hired Non-National policy. Traditionally, such policies were country-specific and governed locally by HR. Today, we see that Mobility is increasingly asked to help create guidelines around this type of move. Non-National policy entitlements often differ by location due to variances in local wages and employee benefits. This means that Mobility must work closely with local Compensation and Benefits teams to build an effective global policy.

Twenty percent of companies are considering adding a Business Traveler policy. This high figure draws attention to one of the most surprising facts from the chart below which is that only 29% of companies reported already having a Business Traveler policy.

More than
20%

of companies are considering adding Commuter or Locally Hired Non-National policies

Please indicate which of the following policies your company currently has in its mobility policy suite or is considering adding



Currently has Overall



Considering Adding



Oil & Gas



Pharma



Consumer Goods



Financial Services



High Tech



Asia Pacific



Europe



North America

	Currently has Overall	Considering Adding	Oil & Gas	Pharma	Consumer Goods	Financial Services	High Tech	Asia Pacific	Europe	North America
Business Traveler	29%	20%	33%	0%	21%	40%	38%	57%	26%	27%
Commuter	37%	22%	52%	29%	36%	25%	0%	14%	47%	34%
Short-Term Assignment	94%	6%	81%	100%	86%	95%	100%	86%	95%	94%
Rotator	20%	13%	71%	0%	7%	5%	8%	14%	21%	20%
Long-Term Home-Based Approach	87%	3%	81%	86%	79%	95%	100%	93%	81%	90%
Home-Based "Light" Approach	18%	15%	10%	0%	7%	25%	38%	7%	7%	27%
Host Plus Approach	21%	12%	14%	14%	21%	20%	15%	14%	21%	23%
Host (no plus) Approach	8%	2%	5%	0%	14%	10%	8%	7%	14%	4%
Developmental/Graduate Program	23%	19%	38%	29%	0%	25%	8%	7%	35%	18%
Globalist	15%	5%	29%	29%	29%	0%	8%	7%	16%	14%
Volunteer/Employee Accommodation Package	12%	13%	5%	14%	14%	10%	15%	0%	7%	17%
International One-Way transfer	64%	16%	10%	71%	71%	95%	100%	29%	49%	80%
Locally Hired Non-National	27%	21%	38%	29%	29%	15%	31%	7%	23%	32%



Policy in Action

Companies reported that, in the last year, they decreased usage of their Long-Term, Home-Based policies and increased usage of the International One-Way Transfer, Short-Term Assignment, Business Traveler, and Locally Hired Non-National policies. All four of these policies are associated with lower-cost approaches to cross-border mobility. Short-Term and Business Traveler assignments reduce costs by limiting the companies' exposure to tax liabilities and ongoing assignment allowances. They can be effectively used for projects and other clearly defined tasks. One-Way Transfers and Locally Hired Non-National arrangements

tend to last longer, often several years or indefinitely. They are sometimes, though not always, used in place of Long-Term, Home-Based assignments but have limitations as outlined earlier in this report.

Policies with increased usage



One-Way Transfer



Short-Term



Business Traveler

In the PAST year, did the number of assignees on the following policies increase, decrease or remain the same?

	Increased	Decreased
International One-Way Transfer	56%	5%
Short-Term Assignment	44%	15%
Business Traveler	35%	6%
Locally Hired Non-National	29%	4%
Commuter	25%	10%
Home-Based "Light" Approach	23%	4%
Host (no plus) Approach	10%	4%
Long-Term Home-based Approach	19%	42%
Host Plus Approach	14%	8%
Volunteer	14%	0%
Rotator	13%	14%
Developmental Program	10%	4%
Globalist	9%	9%

In the UPCOMING year, do you expect the number of assignees on the following policies to increase, decrease, or remain the same?

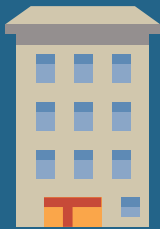
	Increase	Decrease
Short-Term Assignment	55%	5%
International One-Way Transfer	45%	4%
Business Traveler	43%	2%
Commuter	35%	8%
Developmental Program	29%	0%
Locally Hired Non-National	29%	4%
Volunteer	21%	1%
Home-Based "Light" Approach	19%	3%
Rotator	19%	3%
Host Plus Approach	15%	7%
Long-Term Home-Based Approach	14%	31%
Host (no plus) Approach	11%	2%
Globalist	9%	6%

This year, 76% of companies report that all or most of their expatriates are on a home-based balance sheet. Last year, 77% of companies reported the same. It is important to note that companies with host-based policies limit their use for moves into certain locations, or by job level or other criteria. Only 9% of companies use a host-based approach for all or most expatriates.

Describe your primary compensation philosophy for expatriates on temporary assignments of one year or longer.



All or most expatriates are on a home-based balance sheet



All or most expatriates are on a host-based salary approach








We use an even mix of a home balance sheet and host-based salary approach



We use a mix of all different types of approaches

76% 9% 4% 6%

	Oil & Gas	62%	10%	0%	10%
	Pharma	83%	0%	0%	17%
	Consumer Goods	85%	0%	0%	7%
	Financial Services	70%	15%	5%	5%
	High Tech	77%	15%	0%	0%

76%

of companies use a home-based balance sheet for all or most expatriate assignments

"We're moving away from our local plus philosophy for assignments and moving back to a home-based 'light' approach. This has been a key focus as we put a high value on the assignee experience (which was abysmal under the local plus approach)."

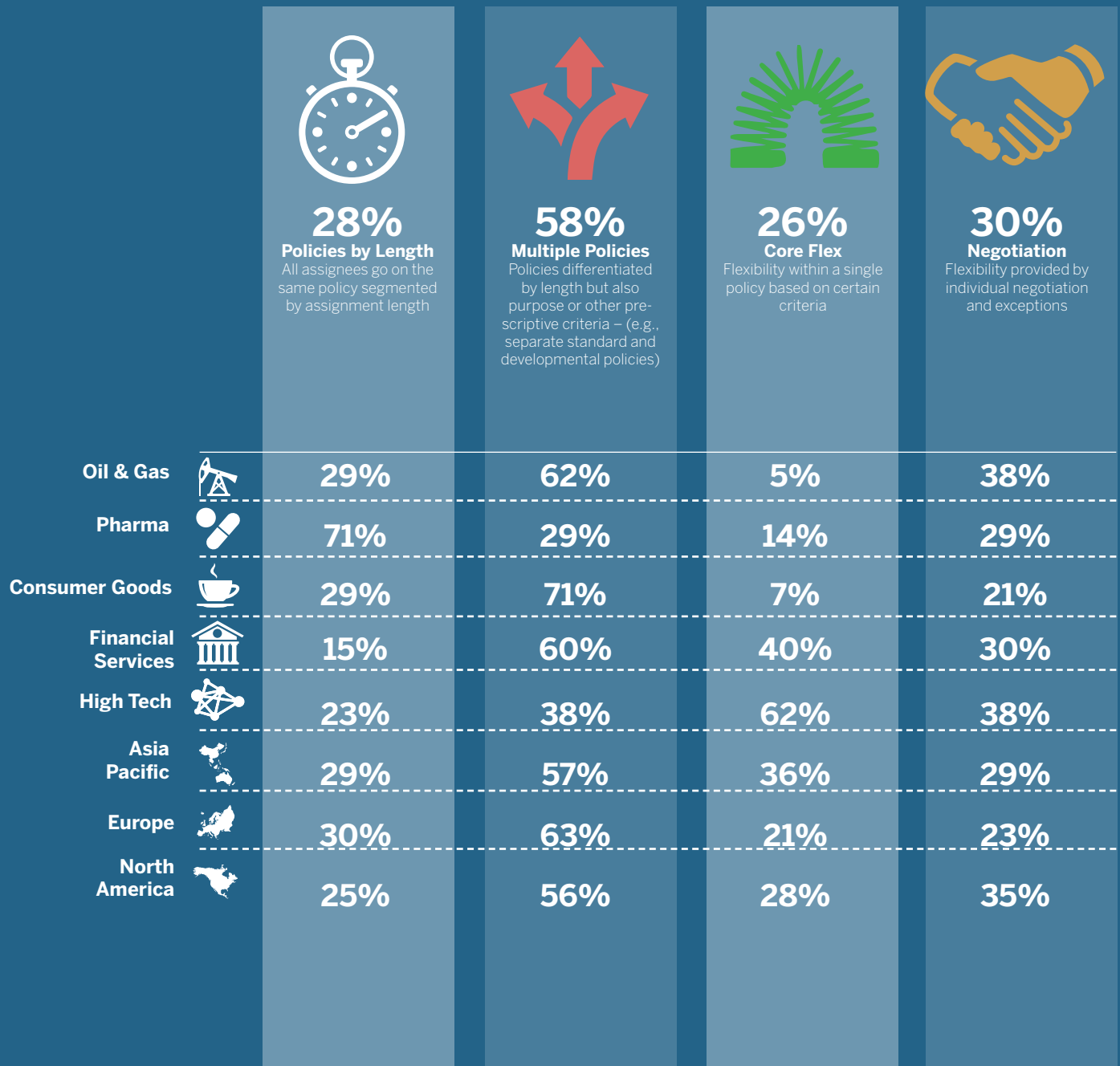
– North America-based participant



Flexibility










Adding new policies and adjusting existing policies to offer the business flexibility is a common objective for Mobility managers. Doing so helps keep the program current and cost effective. Having multiple policies is the most common way to address business flexibility. Since last year's survey, there is a significant increase in the number of companies adding business flexibility. For example, last year, 46% of companies indicated having multiple policies compared to 58% this year. Only 14% reported having a core/flex policy last year compared to 26% this year. Even with formal efforts to increase flexibility, negotiating assignment terms is still fairly common with 30% of companies confirming this as a way to accommodate business needs.

How would you best describe global mobility's approach to providing flexibility?

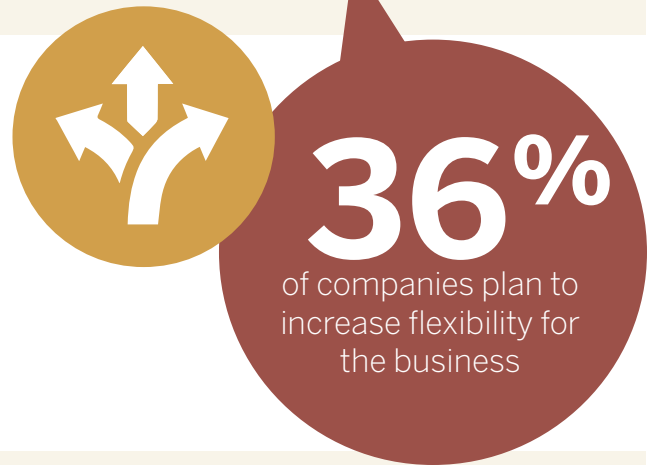


Thirty-six percent of companies are looking to increase flexibility for the business in the next year while 57% report they plan to maintain the level of flexibility they offer today.

In the next year will you look to increase or decrease the level of flexibility to the business?

	 Overall 2017	 Oil & Gas	 Pharma	 Consumer Goods	 Financial Services	 High Tech	 Asian Pacific	 Europe	 North America
Increase	36%	24%	71%	50%	30%	31%	29%	35%	38%
Decrease	7%	14%	0%	7%	5%	8%	14%	5%	7%
Remain about the same	57%	62%	29%	43%	65%	62%	57%	60%	55%










Flexibility for assignees, is also increasing. Fifty-one percent of companies offer some flexibility to assignees - mostly through the delivery of benefits as cash.



This is up from **7%** in 2016

This is up from **4%** in 2016

Please indicate if your company offers flexible choice to the assignee in any of the following ways:

	 Overall 2017	 Oil & Gas	 Pharma	 Consumer Goods	 Financial Services	 High Tech	 Asian Pacific	 Europe	 North America
Providing a cash allowance in lieu of certain in-kind benefits	26%	19%	29%	36%	45%	31%	29%	23%	27%
Offering a choice between a cash allowance or in-kind benefits	18%	19%	29%	21%	20%	15%	7%	16%	21%
Offering a flexible spending or flex points approach	9%	0%	0%	14%	10%	15%	14%	12%	7%
None of the above	49%	67%	57%	36%	35%	38%	50%	53%	46%



Mobility's Priorities and Challenges

Today, Mobility is focused on operational excellence and achieving the organization's strategic objectives. These objectives will remain a focus in the future while Mobility aspires to better align with Talent.

On a scale from 1 to 5, please rate the priorities for Global Mobility within your organization

		Today	Tomorrow
	Strategic objectives	4.0	4.6
	Operational excellence	4.1	4.2
	Assignee experience	3.9	4.0
	Aligning with talent	2.9	3.9
	Business experience	3.7	3.8

KEY(1 = Lowest Priority, 5 = Highest Priority)

Compared to last year, more Mobility functions are reporting success in getting people to go on assignment, selecting the correct packages, and managing compliance. However, fewer companies than last year are reporting success with administrative resources, perhaps a result of the challenge of accomplishing increased tasks with the same or fewer resources. Fewer companies than last year are reporting success with their technology. This may be because Mobility's tasks are expanding or changing so rapidly, that the existing technology no longer addresses all the requirements.

This year, more companies reported challenges with reducing costs, introducing new policies, and managing resources. Reducing costs and adding new policies are both tasks associated with serving the business. Having staff that can execute on those tasks may improve the long-term success of Mobility.

Please share any challenges you are facing in Global Mobility.

	2017	2016
Aligning mobility program with talent strategy	53%	52%
Reducing costs	49%	45%
Technology	39%	39%
Administrative resources	40%	38%
Introducing alternative policy types	41%	26%
Compliance issues	33%	31%
Collaboration with service providers	27%	26%
Putting assignees on the right package	21%	28%
Getting people to go on assignment	20%	20%

More companies are putting assignees on the right packages



“[We have] difficulty keeping knowledgeable resources in Global Mobility due to high workload, high standards, and few opportunities to develop oneself further to other functions.”

– Consumer Goods Participant

Please share what you feel is working well for you in Global Mobility

	2017	2016
Getting people to go on assignment	62%	56%
Putting assignees on the right package	59%	42%
Compliance issues	45%	41%
Reducing costs	12%	15%
Introducing alternative policy types	23%	23%
Administrative resources	17%	26%
Collaboration with service providers	51%	51%
Technology	16%	21%
Aligning mobility program with talent strategy	15%	12%

In summary, Mobility has an increased focus on performance along with new responsibilities managing a growing array of cross-border activity. The 2017 Outlook Survey illustrates that, with a strategic view, the function can become a strong center of expertise. With multiple areas of specialization, Mobility is well-positioned to advise the business and organization on best practices.

By leveraging metrics, Mobility can provide meaningful insights to support its advisory role, manage increasing complexity, and meet performance goals. Mobility's main challenges for 2017 are finding and retaining the right skill sets and ensuring the function is organized to fulfill its objectives.

Survey Participants

130 companies participated in the 2017 Mobility Outlook Survey. The following is a partial list of participating companies:

AB InBev NV	F. Hoffmann-La Roche Ltd.	Philip Morris International
Accenture	Ferring Pharmaceuticals	Procter & Gamble
Adobe	Fluor Corporation	PVH Corp.
AIA Company Limited	Ford Motor Company	Ralph Lauren
Air New Zealand	General Motors Company	Renault
Alfa Laval	GM Financial	Robert Bosch LLC
American Express	Goldwind	Schindler
Arup	Halliburton	Scotiabank
Atkins	Hitachi Europe	Seadrill
Baker Hughes	HP Inc.	Shell
Bayer AG	HSBC	SK Energy Inc.
BMO Financial Group	IFF	Statoil ASA
BNY Mellon	Ingersoll Rand	Sun Life Financial
BorgWarner Inc.	JT International SA	Superior Energy Services
BP	Lenovo	TD Bank Group
British American Tobacco	Lilly	Tetra Laval Group
Campbell Soup Company	Lockheed Martin	Tetra Pak International SA
Carlsberg group	Maersk Oil	The Dairy Farm Company
Caterpillar Inc.	Mars Foods Inc.	The MITRE Corporation
Centrica	McDonald's Corporation	The Northern Trust Company
Chevron	Micron Technology, Inc.	Thiess Pty Ltd
Colgate-Palmolive Company	Morningstar	TJX
ConocoPhillips	Nabors	Trimble Inc.
Daimler AG	National Oilwell Varco	Twitter
Dell	Nike	UCB SA
Deutsche Bahn AG	Norwegian Refugee Council	UEM Group Berhad
Diamond Offshore	OMV	Unilever
DLA Piper	Oracle	Viacom
Dow Chemical	Owens Corning	Visa
EGIS SA	Owens-Illinois	Western Union
EnSCO plc	Pacific Drilling	Westinghouse
Equinix	Pearson Plc.	World Vision Intl
EY	PETRONAS	Yum Brands

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