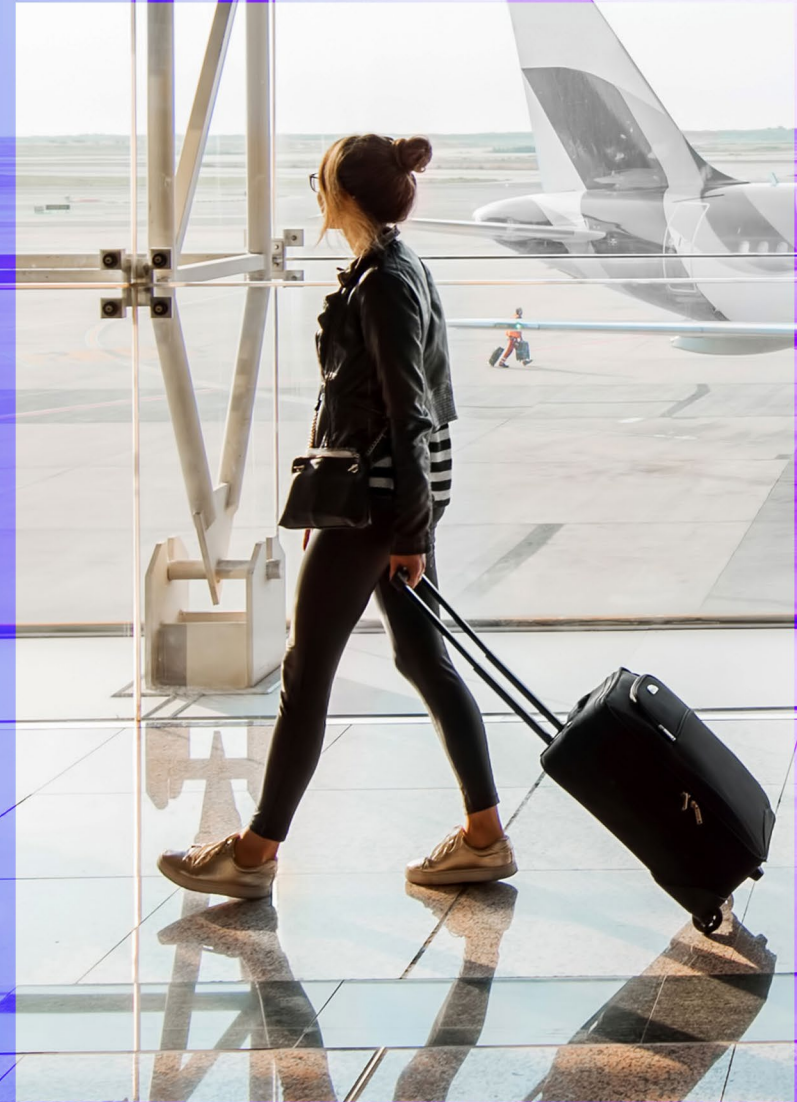




2024 KPMG Global Mobility Benchmarking Survey

Charting the future — strategic mobility
for tomorrow's workforce



Foreword

The findings of the *KPMG 2024 CEO Outlook* portray a global business environment that is more changeable than ever.¹ A complex combination of geopolitical uncertainty, impacted global supply chains, disruptive new technologies and shifting economic pressures has accelerated the pace of global innovation, forcing established organizations to adapt quickly or risk obsolescence.

Governments are being forced to respond, bringing waves of new legislation and regulatory changes for both employees and corporations, creating fundamental shifts in the compliance landscape in which businesses are required to operate. Meanwhile, global workforces remain essential in achieving strategic objectives, but top talent now has new demands and expectations which need to be met and managed to attract and retain them.

Global mobility professionals play a crucial role at the intersection of these diverse challenges. They are not only expected to deliver exceptional service to the business and ensure global compliance and operational efficiency, but also increasingly relied upon to provide strategic advice. This advice supports the business in navigating risk and influencing broader talent, tax and human resources (HR) strategies. It is now more critical than ever for global mobility leaders to prepare themselves for these broader and more impactful conversations by leveraging data-led insights into their peers' performance to shape their response to changing demands.

KPMG International's detailed *2024 Global Mobility Benchmarking Survey* provides timely and revealing insights into global mobility's evolving role. The global mobility function's contribution to strategic value for the organization is taking precedence: being recognized as a trusted advisor to the business is the way forward. Global mobility leaders should aim to ensure that their service delivery model, team and technology are set up to meet new demands and continue demonstrating the value their functions bring to their organization.

Thank you to all who participated in the *2024 KPMG Global Mobility Benchmarking Survey*. This report presents an overview of selected key findings and offers informative insights for global mobility professionals on the future evolution of the function.

¹ *KPMG 2024 CEO Outlook*, KPMG International, 2024.



Marc Burrows

Head of Global Mobility Services
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Marc Burrows is the global head of Global Mobility Services and a member of KPMG's International Tax Steering Group. With his extensive experience, Marc has been dedicated to collaborating with clients to address the complexities associated with an increasingly mobile workforce. He advises companies and leaders across a range of issues, including business traveler risk, incentive compensation management, global mobility policy and cross-border taxation.



Katherine Avery

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Katherine Avery is a principal with the KPMG Global Mobility Services practice in the US. With 20 years of experience in human resources, she helps clients drive greater efficiencies in employee mobility programs and ensures effective alignment with the organization's talent strategy. Katherine has a distinguished record in leading global mobility, compensation delivery, learning and development and partnering with C-suite leaders to drive organizational effectiveness.

Contents

04

Introduction

Navigating the new demands on global mobility

13

Talent management

Bridging talent gaps

06

‘At a glance’ findings

Key insights from the 2024 KPMG Global Mobility Benchmarking Survey

17

Service delivery model

Optimizing mobility delivery

07

Mobility programs

Owning the mobility strategy

21

Technology

Investing in technology, strategically

10

Mobility policies

Leveraging adaptable policies

24

Looking ahead

Global mobility priorities for 2025

Introduction

Navigating the new demands on global mobility



The challenging commercial and geopolitical environment is prompting many organizations to assess their global strategies in order to capitalize on emerging opportunities. Despite this landscape, 72 percent of CEOs remain confident in the growth prospects of the global economy over the next three years.² To enable this growth some are evaluating their global operating models, considering how to evolve and leverage technology and AI to increase effectiveness and drive additional value. Others are reassessing their global presence, exploring previously untapped markets and seeking innovative avenues for growth.

As businesses aim to thrive in this uncertain environment, leaders recognize that a deep understanding of these opportunities and managing the associated risks will be essential to creating successful global strategies that promote sustainable success.

Increasingly, global mobility leaders are facing new questions and data requests, and their teams are expected to meet evolving demands from their organization's leaders. These demands are often diverse and sometimes contradictory, requiring leaders to navigate complex priorities, conduct difficult conversations and find innovative solutions to new challenges.

Encouragingly, in many cases, global mobility is seen as part of the solution. However, it remains the responsibility of the global mobility function to shape its role and position itself strategically to respond to these new business requests.

Businesses often have competing internal expectations. On the one hand, global mobility is being asked to increase compliance control by embedding the appropriate mechanisms to track and proactively manage risk in response to increased scrutiny from global authorities. On the other hand, functions are being asked to enable more flexible ways of working, such as remote work, commuting arrangements and frequent business travel, all of which raise the risk profile of their organizations.

Similarly, global mobility leaders are frequently challenged regarding costs, both in terms of the operational delivery of their program and the mobility policies they offer. Teams are expected to deliver more with fewer available resources while being told that employee experience is essential and that global mobility is vital for attracting and retaining top talent.

These conflicting expectations indicate that stakeholders have varying visions for global mobility and the potential value it can bring to the organization. Effectively navigating these discussions presents both a challenge and an opportunity for global mobility professionals to demonstrate the significant value they can deliver.

KPMG International's *2024 Global Mobility Benchmarking Survey* is designed to equip organizations with the insight and data they need to facilitate and drive these strategic discussions. The benchmarking insights examine how global multinationals have

adapted and positioned their global mobility functions to keep up with business demands. They also offer a glimpse into the future, revealing how global mobility leaders anticipate their teams will evolve in response to new external and internal pressures.

The need for global mobility programs to adapt to these changing business demands is clear. A primary objective for many global mobility programs is to become more adaptable to changing business requirements — with 51 percent of leaders acknowledging this goal. This figure highlights the widespread awareness among mobility leaders regarding the need to evolve and adapt. The findings of the *2024 KPMG Global Mobility Benchmarking Survey 2024* can help shape and guide what this evolution might mean.

225 multinational enterprises were surveyed across **12 industries** representing **29 countries and jurisdictions**.

² *KPMG 2024 CEO Outlook*, KPMG International, 2024.

'At a glance' findings

Key insights from the 2024 KPMG Global Mobility Benchmarking Survey



Alignment and adaptability with business objectives

72 percent of respondents highlighted the alignment of mobility strategies with broader business objectives as being their top priority, with the need to be adaptable to business requirement (51 percent) being noted as the third-highest priority. This underscores the critical role of global mobility in achieving organizational goals and driving business growth.



Focus on developing, attracting and retaining talent

70 percent of respondents consider the development, attraction and retention of talent within the organization a top priority for mobility. This reflects a strategic shift towards talent within global mobility policies, ensuring that employees are not only internationally mobile but also continuously enhancing their skills.



Formal policies for international remote work

67 percent of organizations that support international remote work have a formal policy in place. This proactive approach helps structure and formalize remote work capabilities, ensuring compliance with tax and immigration laws.



Centralized and regional models for service delivery

Nearly two-thirds of organizations rely on a centralized or regional model for global mobility management. These models help enhance consistency, control and responsiveness to regional dynamics and needs.



Use of technology in global mobility programs

76 percent of businesses use technology tools to manage international assignments and 62 percent use them for cost projection preparation. This emphasizes technology's strategic role in simplifying complex logistical tasks and quantifying relocation and administrative costs.



Integration of diversity, equity and inclusion (DEI) in mobility programs

56 percent of respondents admit to having only a basic level of DEI integration in their mobility programs, and 72 percent do not collect or report on DEI data. This highlights a need for more structured and strategic global mobility approaches that better incorporate DEI.



AI and technology investments

51 percent of businesses are looking to leverage AI in the short- and long-term. This indicates that AI adoption is on the rise, with many organizations planning future AI investments, particularly to help with the automation of administrative tasks (73 percent).

Mobility programs



Owning the mobility strategy



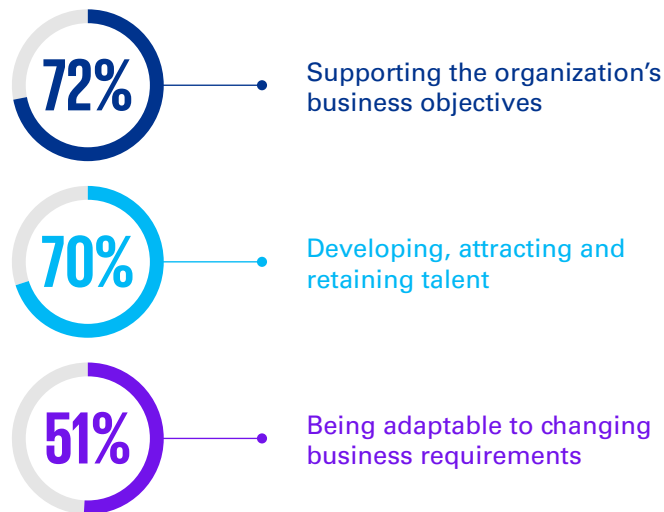
Alignment with the broader business strategy continues to be the critical driver behind most global mobility program goals. Of the respondents, 72 percent highlighted the alignment of mobility strategies with broader business objectives as one of their top three priorities. This emphasis reflects the evolving role of global mobility, accelerated in a post-pandemic world, to act as a strategic enabler to the business — a lever to help unlock and drive growth, enabling organizations to maximize the value of their global workforce.

Global mobility leaders are increasingly required to act as more of a strategic partner to the business, aligning their team’s service delivery model to support key business outcomes and, in many cases, advising and informing strategic decision-making by leveraging their unique expertise. Our survey results show that 89 percent of global mobility leaders anticipate their program will remain just as strategic or become more strategic in the next 12–18 months.

Nowhere is this need for greater strategic partnering more apparent than in the function’s closer alignment with talent. The focus on talent is essential — with 70 percent of respondents considering talent development, attraction and retention a top priority, the talent agenda is top of mind for global mobility leaders. Currently, 44 percent of global mobility functions sit within a Talent or HR Shared Services function, compared to 28 percent in 2022.³

Program overview

In addition to **compliance**, global mobility professionals ranked the top three goals for their international assignment program as follows:



Note: The percentages shown are of respondents who selected these options in their top three selections.

Source: 2024 KPMG Global Mobility Benchmarking Survey, KPMG International.

The need for alignment is increasingly reflected in organizations’ operating models and ways of working. Alongside this shift comes an enhanced opportunity for global mobility to ‘have a seat at the table’ regarding strategic talent discussions, empowering leaders to shape and drive workforce strategies and build the value of global mobility within their organizations.

Despite the advancements achieved, the survey results highlight a considerable gap in the effective communication of the global mobility strategy across the broader organization. Only 46 percent of respondents indicated that they believe their global mobility strategy has been ‘widely communicated’ to key internal stakeholders. However, of those, only 27 percent feel confident that the strategy has been fully understood by these stakeholders.

Furthermore, only one-third (31 percent) of the respondents are currently in the process of introducing the global mobility strategy to a wider audience within the organization, signaling a slow progression in promoting this critical information. Alarming, 20 percent of participants reported that their strategy is only comprehended within the confines of the global mobility team itself, suggesting that crucial insights are not permeating the larger business context.

³ 2022 KPMG Global Assignment Policies and Practices Survey report, KPMG International, 2022.

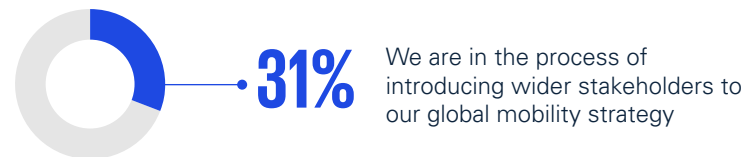
The ability to effectively communicate the global mobility strategy is not just a matter of sharing information; it is a vital component for the successful implementation of the strategy overall. Ensuring that all relevant stakeholders have not only access to this information but also a clear understanding of it is essential for driving engagement, alignment, and ultimately, contributes to the success of the organization's global mobility initiatives.

There is a clear opportunity for global mobility leaders to take greater ownership of their strategy and position within the organization — working with stakeholders to ensure the strategy aligns with business and talent needs. However, even for organizations where the strategy has been clearly defined and shared, there remains a need for the function to be highly adaptable. Flexing the strategy where needed is key to keeping up with new stakeholder demands and ensuring the strategy remains relevant and effective.



Sharing the global mobility strategy

Which of the following statements best describes the global mobility strategy in your organization?



Note: Response for "Don't know — 3%" was not included.

Source: 2024 KPMG Global Mobility Benchmarking Survey, KPMG International.

Key takeaways for today's global mobility leaders

- Periodically review and map out your internal stakeholders to understand their respective roles, strategies and pain points, as well as understand and challenge how global mobility fits into their plans.
- Define and document the global mobility strategy, regularly test it with senior leaders. Don't be afraid to adapt the strategy as needed to address evolving business needs.
- Take advantage of opportunities to build your brand and increase awareness of your global mobility strategy and capabilities. Highlight the value you bring to the wider organization in achieving its strategic objectives.
- Workforce planning and talent priorities are more critical than ever. Align mobility closely with talent at the organizational level to improve mobility's visibility and insights during talent planning discussions.

Mobility policies



Leveraging adaptable policies

The rising demand for business adaptability is expected to influence how global mobility leaders anticipate their functions will evolve in the future. With a growing emphasis on cost efficiency, organizations are looking to utilize more affordable options such as short-term moves, extended business travel, and remote work as alternatives to traditional long-term assignments.

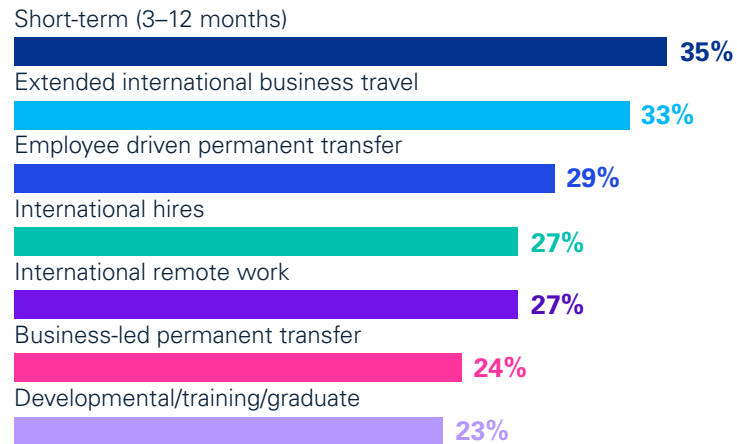
This focus on affordable options is not a new development in the market. The 2022 KPMG Global Assignment Policies and Practices Survey similarly identified extended business travel and short-term employee relocations as the policy types most likely to see significant increases in future moves.⁴

However, rising economic pressures and the emphasis on cost-effectiveness — identified as a top priority by 39 percent of respondents in the 2024 survey — are prompting organizations to focus on moves that they believe will generate the greatest value while minimizing costs within business units. Remote work plays a crucial role in this shift, with 27 percent of respondents expecting it to increase significantly over the next 12 to 18 months.

Employee requests for permanent transfers are similarly expected to increase, according to 29 percent of respondents. This trend may stem from a growing desire among employees for greater autonomy and personal fulfillment in their careers,

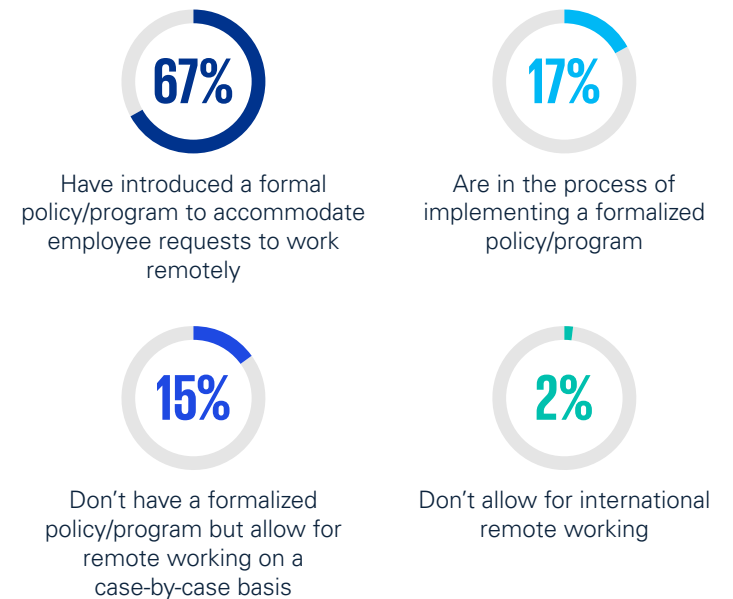
including the flexibility to relocate for personal or professional reasons. Organizations increasingly recognize the importance of accommodating these preferences to retain top talent and maintain a motivated workforce.

Over the next 12–18 months, these policy types are expected to increase the most



Source: 2024 KPMG Global Mobility Benchmarking Survey, KPMG International.

Are you facilitating international remote work requests from employees?



Source: 2024 KPMG Global Mobility Benchmarking Survey, KPMG International.

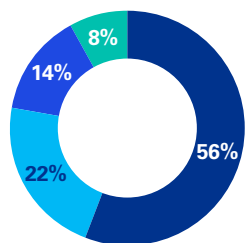
⁴ 2022 KPMG Global Assignment Policies and Practices Survey report, KPMG International, 2022.

Despite the growing flexibility and opportunities that shorter-term, remote and employee-driven moves provide, respondents are not viewing these through a diversity, equity and inclusion (DEI) lens. A total of 56 percent admit to having only a basic level of integration of DEI in their mobility programs, and a significant 73 percent do not collect or report on DEI data for their mobile workforce. Among those who collect data, 52 percent compare it to corporate goals, while 34 percent analyze specific DEI categories.

These findings suggest that, although global mobility programs increasingly offer tools and mechanisms to support employees seeking more flexible and accessible global experiences, they are not perceived internally as achieving these objectives. Consequently, they are not promoted as aligning with broader DEI strategies. Only 14 percent of respondents believe their policies comprehensively address DEI.

To enhance the promotion of these policies, mobility leaders could share and validate their current practices with underrepresented groups within the organization. This approach may help position their policies as opportunities that provide valuable experiences to a wider range of suitable candidates at key stages in their careers.

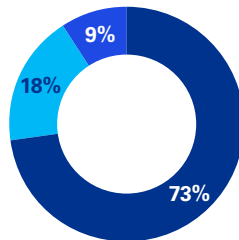
Mobility policies that address DEI



- Policies address DEI at a basic level
- Policies do not address DEI
- Policies address DEI at a comprehensive level
- Don't know

Source: 2024 KPMG Global Mobility Benchmarking Survey, KPMG International.

DEI data for the mobile workforce



- Data is not collected or reported
- Yes, data is collected or reported
- Don't know

Source: 2024 KPMG Global Mobility Benchmarking Survey, KPMG International.

How is the DEI data analyzed?

Comparing mobility DEI metrics to corporate goals



Analyzing unique DEI categories



Matching the mobility workforce with overall workforce composition



Note: Response for "Don't know — 7%" and "Other — 7%" were not included.
Source: 2024 KPMG Global Mobility Benchmarking Survey, KPMG International.

Key takeaways for today's global mobility leaders

- Regularly review and update mobility policies to keep global mobility programs effective, competitive, and aligned with evolving business needs. Post-pandemic updates may now be outdated due to significant changes in the business environment.
- Prioritize reviews based on the types of moves required by the business. Given recent trends, reviewing short-term move policies should be a priority for most organizations.
- Use external benchmarking to enhance policy reviews. Comparing your policies with industry standards ensures they are competitive and attractive in today's talent marketplace.
- Minimize exceptions to mobility policies to reduce costs and administrative burdens, underscoring the need for regular policy reviews.
- Ensure equitable global mobility opportunities by examining mobile workforce demographics against the wider organization. This data helps support underrepresented groups.
- Evaluate whether flexible and accessible policies are seen as DEI enablers. Track if these moves contribute to achieving DEI goals.

Talent management

Bridging talent gaps

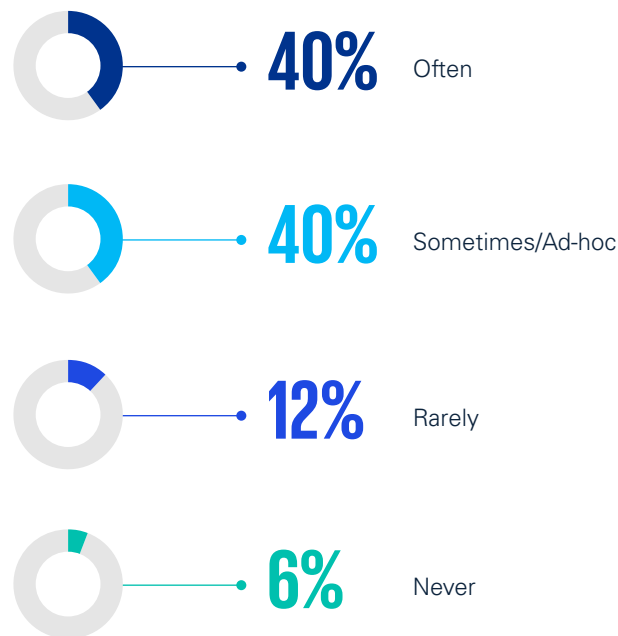


Reflecting the increasing need for more agile workforces, with a greater need for new skills and capabilities than ever before, our 2024 KPMG CEO Outlook reveals that 92 percent of CEOs are looking to increase the overall workforce over the next three years, with 80 percent agreeing that organizations should invest in skills development to safeguard access to future talent.⁵

Alignment with talent, therefore, remains one of the most significant opportunities for global mobility and is widely perceived by leaders as an area where the function can have the greatest strategic impact within their organizations. With 70 percent of the 2024 KPMG Global Mobility Benchmarking Survey respondents confirming that talent is one of their top priorities over the next 12 to 18 months, global mobility leaders are exploring new ways to work with the talent function to enhance value.

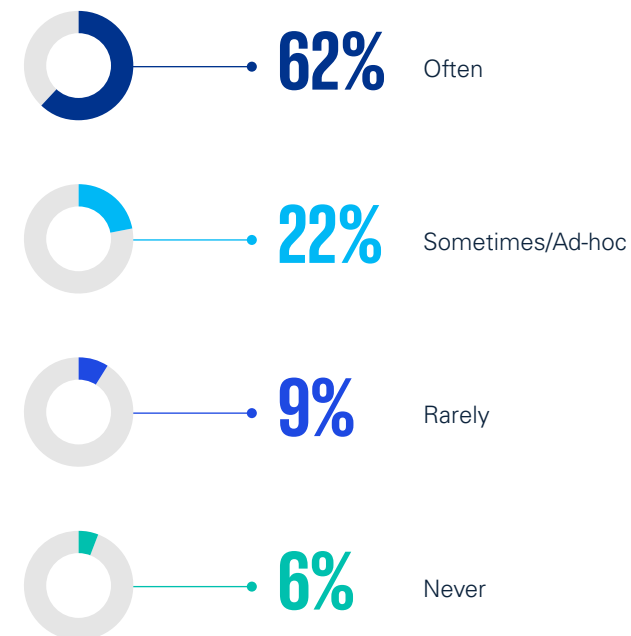
However, the survey indicates that there is still much progress to be made in fostering this collaboration. The frequency of interactions between global mobility and the talent function is notably lower compared to engagements between global mobility and the reward function. Specifically, global mobility connects with talent stakeholders in only 40 percent of cases, whereas interactions with colleagues in Total Rewards occur 62 percent of the time. This suggests that interactions with talent are more infrequent and ad-hoc, highlighting significant opportunities to strengthen connections with both talent strategy and operations.

How often do you connect with Talent Management or HR Business Partners to discuss the business' talent needs?



Note: Response for "Don't know — 2%" was not included.
Source: 2024 KPMG Global Mobility Benchmarking Survey, KPMG International.

How often do you connect with colleagues in Total Rewards?



Note: Response for "Don't know — 2%" was not included.
Source: 2024 KPMG Global Mobility Benchmarking Survey, KPMG International.

⁵ KPMG 2024 CEO Outlook, KPMG International, 2024.

The lack of involvement in talent activities is particularly striking. Sixty-six percent of respondents reported that global mobility is 'not at all involved' in employee skills development, while 57 percent stated that it is 'not at all involved' in succession planning and 52 percent claimed it is 'not at all involved' in selecting candidates for relocations. On average across these tasks, only 6 percent of respondents confirmed that global mobility is 'highly involved' in these critical and strategic areas.

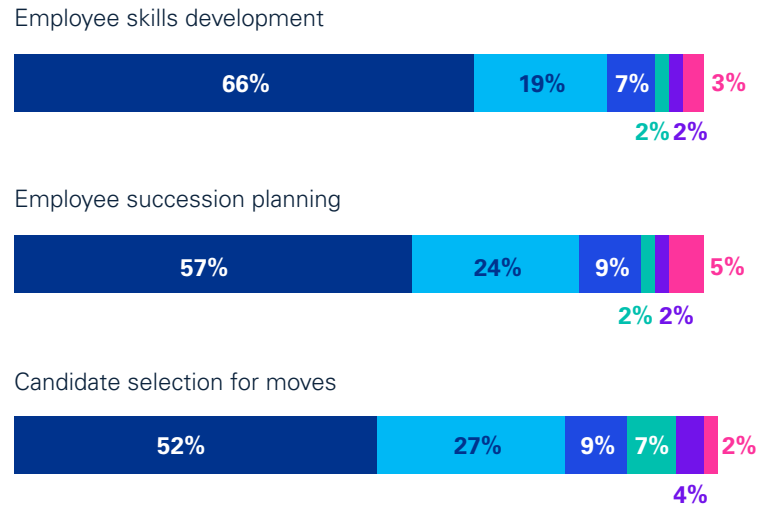
Global mobility has a significant ability to influence and enhance key talent activities. As organizations increasingly seek to leverage their global workforces more effectively and strategically, it is crucial to help the business understand the capabilities and insights that global mobility can provide.

The function has evolved beyond merely facilitating traditional and costly long-term assignments; it now offers the skills and tools necessary to address both short-term and long-term talent gaps through strategic global moves. Building this strategic mobility brand has become a core aspect of the global mobility leader's role.

One-way leaders are elevating the brand and, more broadly, supporting their talent function is through enhanced data reporting and insights, which they also share with the wider business. Our survey findings support this view, with respondents saying that alongside program cost and compliance reporting, metrics related to process efficiency (54 percent) and wider stakeholder reporting (48 percent) are critically important.

Currently, 71 percent of respondents report that data sharing is typically done using Excel. However, more innovative global mobility programs, used by about 25 percent of respondents, are leveraging advanced data-sharing methods, such as dashboards

How involved is global mobility in the following tasks?



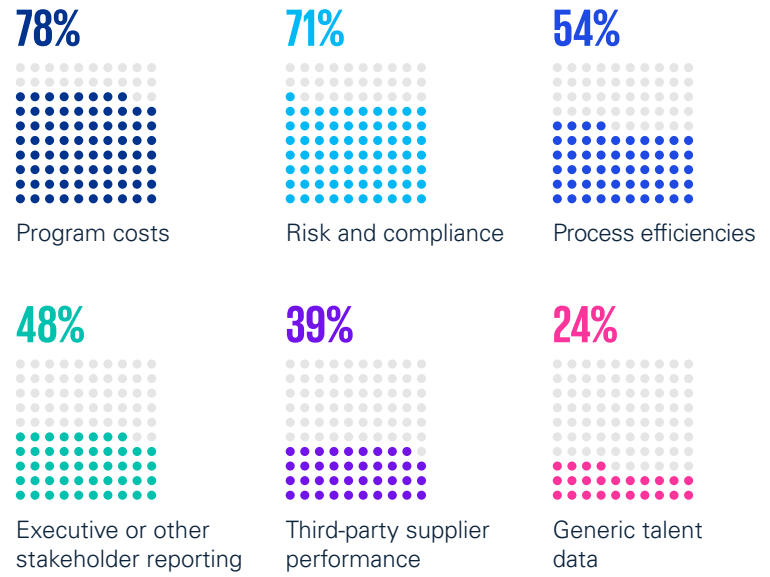
- Not at all involved
- Slightly involved
- Moderately involved
- Highly involved
- Completely involved
- Don't know

Source: 2024 KPMG Global Mobility Benchmarking Survey, KPMG International.

and analytical platforms, to foster better conversations and generate deeper insights into the business.

Many global mobility leaders face challenges with reporting capabilities, as various obstacles can impede the delivery of data-based insights. A notable issue is the integration of data into a consistent platform; 54 percent of respondents indicated that this challenge prevents them from effectively implementing analytics.

What insights are most important to you?

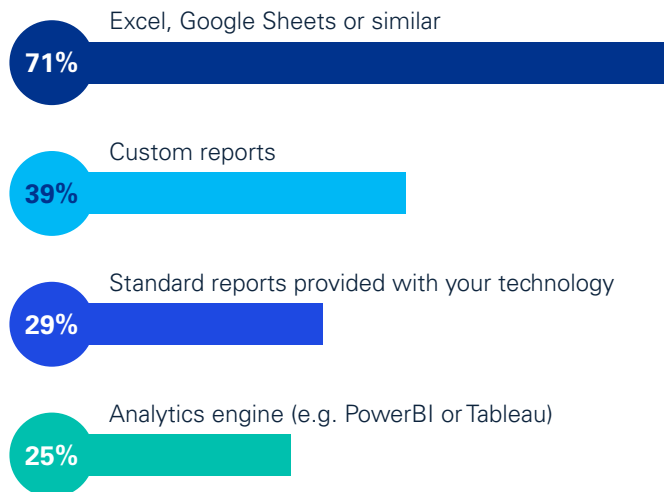


Note: Response for "Other — 1%" and "Don't know — 5%" were not included. Source: 2024 KPMG Global Mobility Benchmarking Survey, KPMG International.

Additionally, limitations in resources and team capabilities are seen as significant barriers. Acquiring approval for costs associated with internal and external analytics teams can be difficult, making analytical skills increasingly valuable for global mobility teams to grow internally.

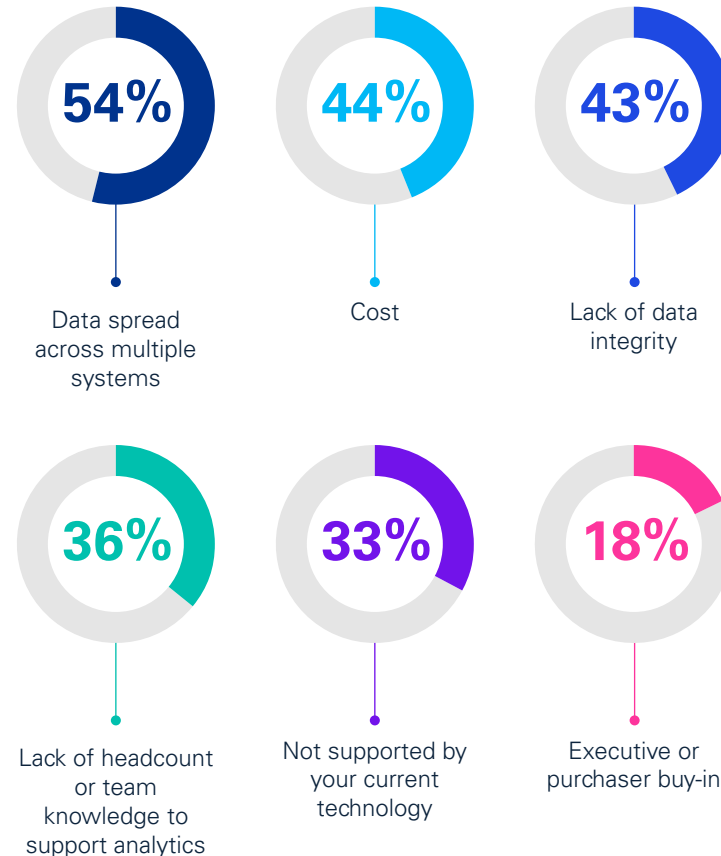
Moreover, insights are crucial for effectively communicating your mobility story and securing the investments necessary to support your program, including headcount, technology and more.

How are you currently reporting on information from your technology systems?



Source: 2024 KPMG Global Mobility Benchmarking Survey, KPMG International.

What are the biggest challenges you face in implementing analytics in your global mobility program?



Source: 2024 KPMG Global Mobility Benchmarking Survey, KPMG International.

Key takeaways for today's global mobility leaders

- Regularly engage with your talent stakeholders to understand their challenges and identify how global mobility can add greater value to support them in their roles.
- Critically evaluate talent processes and document areas where global mobility should have greater involvement and impact.
- Identify the data that talent stakeholders need from the global mobility function and use it to facilitate data-driven discussions with the talent community. Leverage workforce planning information from talent leaders for mobility planning.
- Assess your current data-reporting functionality and enhance your team's skills to improve existing reporting capabilities.

Service delivery model



Optimizing mobility delivery

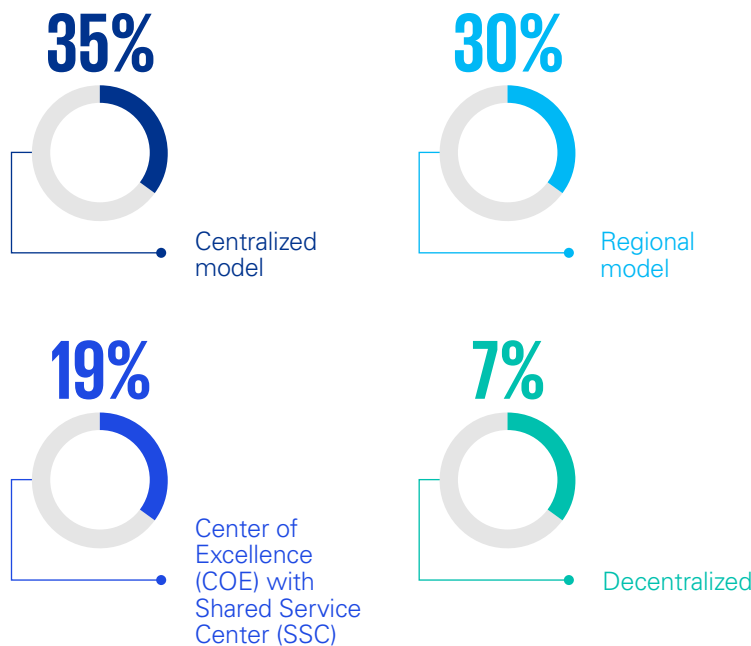
Selecting the appropriate service delivery model to facilitate global mobility strategies and drive effective policies and behaviors is essential for the success of the function. When designing a structure, leaders should consider both current and future business needs to help ensure their models can address these needs effectively.

Additionally, when scoping the role of global mobility, leaders should carefully evaluate the capabilities and limitations of the chosen delivery model. This consideration is particularly important as expectations surrounding global mobility continue to evolve.

At the organizational level, most businesses adopt either a centralized or regional model for service delivery. Currently, 35 percent of companies prefer a centralized approach, while 30 percent opt for a regional model. This trend highlights a strong need for effective control and governance in mobility services, but it also suggests that centralization is not the only feasible option for achieving these objectives.

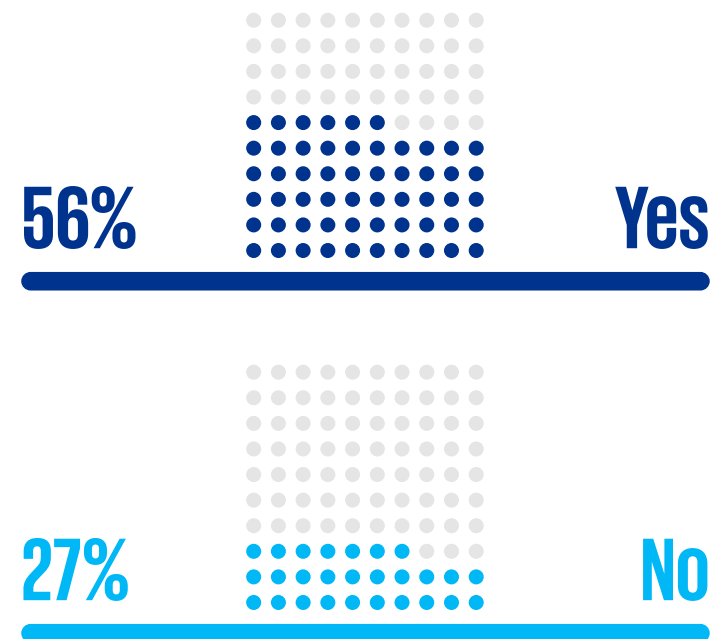
As it becomes increasingly important for leaders to understand and respond to the diverse needs of employees and the business in various global locations, a regional model may offer organizations a better way to customize their services to meet the specific requirements of the local workforce. This approach helps ensure that both employees and business lines receive enhanced support and greater value from global mobility services. With 56 percent of respondents noting their awareness of growing employee numbers in certain locations, they are aware of where employee numbers are growing, it is vital that these areas receive adequate support.

Which one of the following best describes your global mobility service delivery model?



Note: Response for "Other — 6%" and "I don't know — 3%" were not included.
Source: 2024 KPMG Global Mobility Benchmarking Survey, KPMG International.

Do you have the latest information on where your business unit's employee populations are geographically growing?



Note: Response for "Don't know — 17%" was not included.
Source: 2024 KPMG Global Mobility Benchmarking Survey, KPMG International.

What tasks do you outsource to a third-party provider?



Note: Response for "Other — 24%" was not included. Source: 2024 KPMG Global Mobility Benchmarking Survey, KPMG International.

As part of this need to ensure effective service delivery, global mobility leaders are increasingly assessing their operating models to efficiently leverage the capabilities of their supplier ecosystems. Choosing the right mix of insourced, outsourced and co-sourced delivery may be an effective avenue for global mobility leaders to unlock more value from their processes.

It remains the norm for organizations to outsource their program's compliance services to specialized providers, utilizing their expertise to support local tax, payroll, immigration and social security requirements and insights. Increasingly, however, a greater number of organizations are critically assessing the operational components of their programs to identify where suppliers can offer additional value.

Over the next 12 to 18 months, it is expected that the use of third-party suppliers to support operational activities will continue to increase, with the biggest drivers for this change being the need to improve operational efficiency (cited by 69 percent of respondents), enhance customer experience (59 percent) and provide expertise that is difficult to source and retain internally (53 percent). Where global mobility leaders leverage these outsourced services, it often allows internal mobility teams to focus more on partnering with the business and improving the employee experience by reducing the time spent on operational tasks.

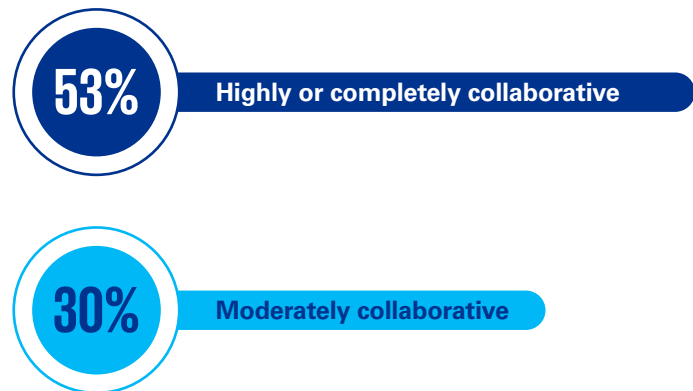
For the tasks that are expected to increase over the next 12-18 months, what are the biggest drivers of this change?



Note: The response for "Other — 6%" was not included. Source: 2024 KPMG Global Mobility Benchmarking Survey, KPMG International.

In all cases where organizations use outsourced suppliers, close collaboration is critical to ensure mutual success. Trust is often built through the supplier’s ability to act as a ‘challenging partner,’ supporting mobility leaders’ decision-making through meaningful data and innovative approaches that have proven effective for other organizations in the sector. Approximately 53 percent of respondents describe their relationship with outsourced suppliers as highly or completely collaborative, suggesting that the strategic value they add goes beyond the scope of services delivered.

How would you rate the level of collaboration and integration between your third-party suppliers?



Note: Responses for “Don’t know — 17%” was not included.
Source: 2024 KPMG Global Mobility Benchmarking Survey, KPMG International.



Key takeaways for today’s global mobility leaders

- Validate that your service delivery model supports your business strategy and that it is set up to back the needs of local markets, particularly those likely to see a larger number of global moves.
- Consider how you leverage the skills and experience of your supplier network to supplement areas of your program that require additional expertise, technologies or resources across both compliance and operations.
- Collaborate strategically with your suppliers by sharing operational challenges and pain points your program faces while also understanding the approaches other organizations are taking to manage and mitigate these challenges.

Technology



Investing in technology, strategically

The global compliance landscape is becoming increasingly complex, and the unprecedented delays in obtaining new visas and work permits are significantly affecting the time required to relocate employees across borders. Alongside this, there is a pressing need for businesses to address local talent demands swiftly. As a result, leaders are prioritizing operational efficiency and seeking to speed up processes wherever possible to meet these needs.

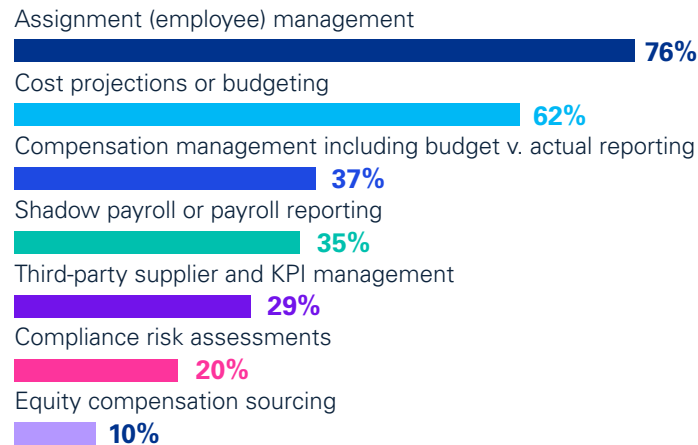
In response, global mobility functions are exploring various technology solutions aimed at optimizing operational efficiency and automating tasks to accelerate processes. Organizations are sourcing these technology solutions in diverse ways; many are opting to license specialist global mobility tools or leverage technologies from their service provider networks. Some, particularly those in the technology sector, are even developing customized in-house mobility solutions that integrate with their existing HR systems as part of their global infrastructure.

As expected, assignment management solutions are the primary tools that most organizations invest in to support their global mobility programs. Seventy-six percent of respondents are utilizing some form of workflow and data management tool for their processes. Notably, these solutions are also frequently used for cost projection (62 percent) and managing compensation data (37 percent) — tasks that have historically been time-consuming and manual for global mobility teams. Thirty-eight percent of respondents indicated that they particularly appreciate features designed to streamline such tasks in their technology tools.

This data suggests that global mobility leaders are being strategic with their technology investments, focusing on automating or eliminating administrative and time-intensive activities that do not create significant strategic value. With 57 percent of respondents planning to invest in technology in the next 12–18 months, enhancements are likely to continue targeting these lower-value activities first.

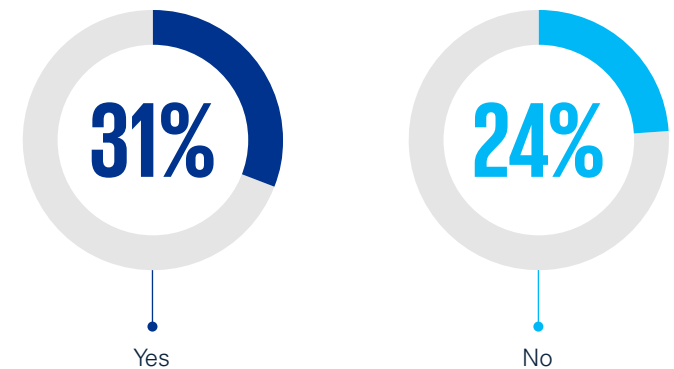
AI is one of several tools that can be used in global mobility operations. However, our survey findings indicate that the

What is the main usage for your technology tools?



Note: Response for "Other — 3%" and "Don't know — 5%" were not included. Source: 2024 KPMG Global Mobility Benchmarking Survey, KPMG International.

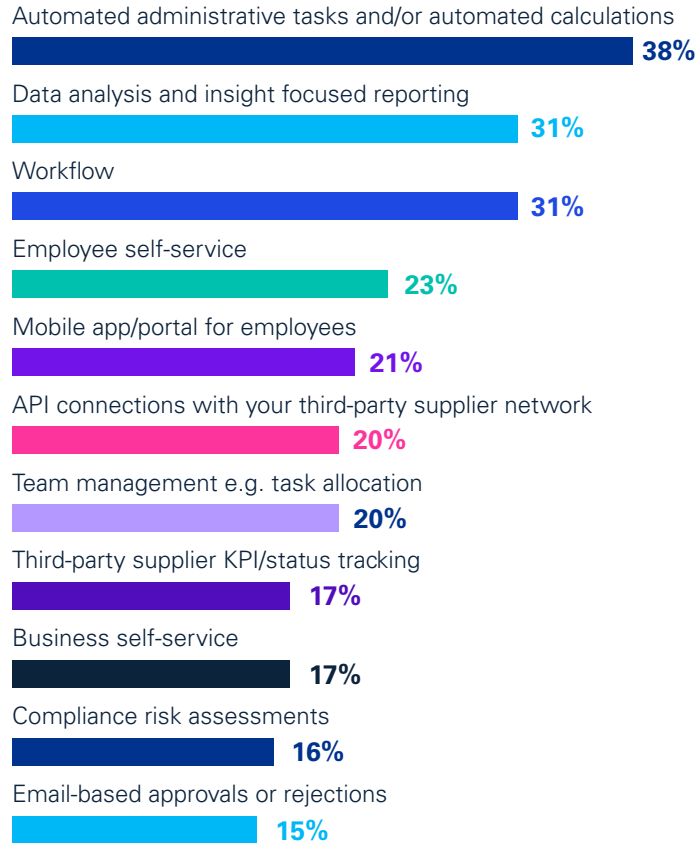
Are you planning to make technology investments in the next 12–18 months?



Note: Response for "Don't know — 46%" were not included. Source: 2024 KPMG Global Mobility Benchmarking Survey, KPMG International.

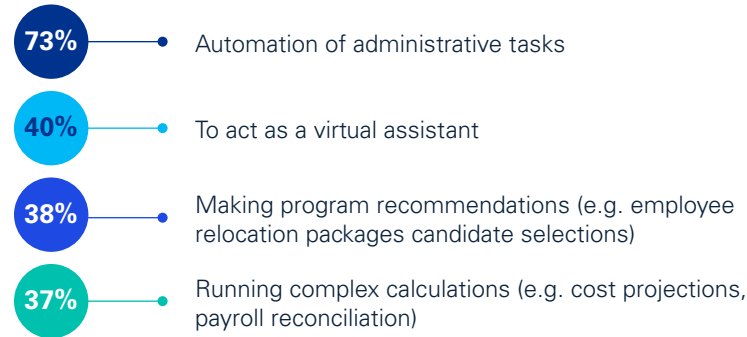
widespread adoption of AI has not yet had a significant impact on these operations. Currently, only 5 percent of survey respondents are using AI in their regular processes. Nevertheless, 51 percent of respondents plan to integrate AI into their programs in the future, indicating that global mobility teams recognize the potential for AI to enhance both employee and corporate experiences. It further indicates that AI adoption is on the rise, with many organizations planning future AI investments, particularly to help with the automation of administrative tasks (73 percent).

Top features most helpful in technology tools



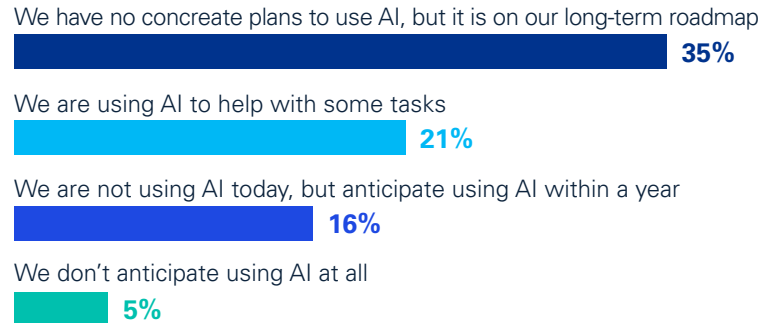
Source: 2024 KPMG Global Mobility Benchmarking Survey, KPMG International.

Within your global mobility program, where are you looking to leverage AI



Note: Response for "Other — 2%" and "Don't know — 10%" were not included.
Source: 2024 KPMG Global Mobility Benchmarking Survey, KPMG International.

Where are you on your AI journey today?



Source: 2024 KPMG Global Mobility Benchmarking Survey, KPMG International.

Key takeaways for today's global mobility leaders

- Understand the technology available to your global mobility team through your supplier network. Many providers use specialist platforms that can easily fit into your technology ecosystem. Often, these technologies are not used to their fullest extent or within contractual terms as the owner lacks awareness of their full capabilities.
- Before investing in new technology, assess where your global mobility team spends their time. Focus investments on automating low-value and repetitive tasks that consume the most effort.
- Given the expanding range of potential use cases for AI, establish a strategy for AI that aligns with business goals and identify areas where AI can deliver the most value to enhance the corporate or employee experience.

Looking ahead

Global mobility priorities for 2025

The future is fast emerging for today’s global mobility programs. Forward-thinking organizations recognize the need for global talent mobility to provide strategic value in today’s dynamic environment. Being a trusted advisor to the business, adaptable to new demands, is essential.

Our message for today’s global mobility leaders should be clear. Do not underestimate the critical need to compare your organization’s current mobility strategies with those of global competitors in order to assess the real value of current operations and to shape a pivotal new future of game-changing talent mobility initiatives, programs and policies.

The strategic shift to cross-border moves that leverage diverse talent, foster global collaboration, and streamline operations is accelerating, driven by the need for specific expertise in a complex international market. Concurrently, businesses should address regulatory compliance challenges and ensure comprehensive data alignment with international requirements and tax laws.

We hope you find this KPMG report timely and insightful. Below is a summary of key findings and insights from KPMG specialists on navigating the future of global mobility programs.

Strategic spotlight

Global mobility professionals are increasingly taking on a more strategic role within organizations. Their aim is not only to manage employee relocation logistics but also to align efforts with organizational priorities, enhance user and employee experiences, and boost the value generated by mobility.

For employees, this shift means smoother transitions, better support systems, and more engaging relocation experiences. For organizations, it translates to more effective talent management, cost efficiency, and greater compliance, all contributing to the operational excellence of the global mobility program.

To stay competitive, organizations should regularly review and update mobility policies. This includes monitoring program costs, conducting external benchmarking, minimizing exceptions, and aligning policies with evolving business strategies and objectives.

Service delivery and compliance

Organizations are increasingly optimizing their mobility service delivery models by automating and outsourcing routine tasks. This strategic shift frees up global mobility teams to focus on higher-value interactions with employees and business partners.

By refining their service delivery, organizations achieve greater operational excellence and enhance the overall stakeholder experience, positioning themselves as employers of choice in a competitive global market.

Alignment with talent

Talent remains a key priority, prompting organizations to align global mobility processes and policies with broader talent goals. Greater collaboration with talent functions is essential to ensure global mobility effectively supports these priorities.

Global mobility leaders should anticipate more frequent consultations on how their programs can enhance talent processes. They must ensure they have relevant data, including demographic information, to support discussions on DEI and other talent-related topics.

Organizations support short-term remote work

Organizations increasingly support workcations or short-term remote work arrangements lasting less than 90 days. This trend highlights the benefits of flexible work locations while maintaining operational continuity.

Allowing employees to work temporarily from different locations accommodates their preferences for flexibility, boosting morale and productivity.

Technology and the AI revolution

Many organizations aim to increase spending on global mobility technologies, but investments must be strategic and deliberate. Funds should target high-impact areas, focusing on operational tasks and low-value, repetitive activities.

Technology, especially AI, can significantly enhance the effectiveness of global mobility functions by improving efficiency and capabilities. To be future-ready, mobility teams must secure budgets, increase institutional knowledge, and acquire resources that leverage data to advance their programs.

Survey methodology and demographics

For global mobility leaders of multinational organizations, benchmarking your policies and practices against other global organizations and industry peers can be a powerful tool to assess your current approach and position your talent mobility program for the future.

The 2024 KPMG Global Mobility Benchmarking Survey provides valuable data on global mobility programs and how they are evolving in terms of mobility, tax and immigration policies, structure, governance, priorities, performance measures, technology, robotics, automation, international remote working and more.

The survey insights highlight the evolving nature of global mobility programs, covering policy development, tax and immigration strategies, organizational structure and governance. It also examines how priorities are shifting towards performance metrics, and the integration of advanced technologies including robotics and automation.

North America and Europe

European organizations were the highest participants by region, representing approximately **43 percent** of survey respondents.

North America was the second-highest participating location by region, with approximately **40 percent** of respondents.

Central/South America

Central and South America accounted for approximately **6 percent** of respondents.

Africa/Asia Pacific

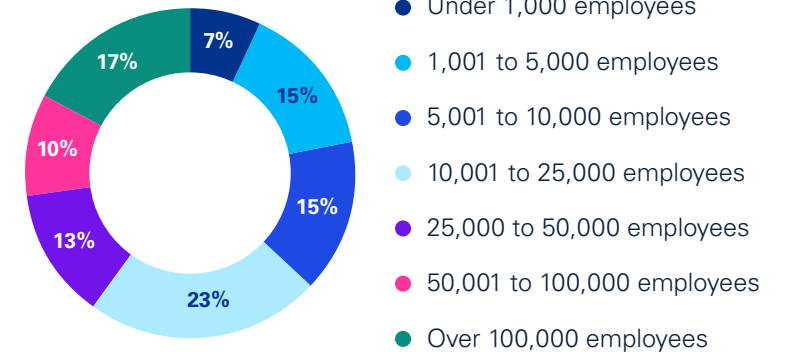
Africa and Asia Pacific organizations accounted for the remaining **11 percent**.

Participant demographics



Note: Respondents chose all answers that applied to their organization. Source: 2024 KPMG Global Mobility Benchmarking Survey, KPMG International.

Employees



How to access the KPMG Mobility Benchmarking Survey

To participate in the KPMG Global Mobility Benchmarking Survey, please visit: kpmg.com/gmbenchmarkingsurvey

There, you’ll find a direct link to begin the survey, along with helpful information and instructions.



Get started:

Benchmark your organization today:

KPMG Global Mobility Services professionals can provide a personalized benchmarking report, allowing you to compare your organization across key areas of interest. Participants find this helpful in evaluating their organizational policies against a specific set of parameters. In addition to providing essential organizational demographics and a global mobility policy overview, the survey questions follow an overarching framework of the critical phases of the lifecycle of the mobile workforce. Additional topics examined include immigration compliance, assignment management technology use, automation and robotics and program data and analytics insights.



Connect with us:

Managing global mobility programs can be complex. Supporting the current business agenda and talent mobility strategy — including diverse international assignments, employee relocations and remote working arrangements — is today’s reality for the global mobility function. Improving employee experience, mitigating ongoing global disruptors, managing regulatory risk, and supporting compliance while balancing costs and providing business value can be an intricate challenge. KPMG Mobility Consulting Services professionals can provide the talent mobility services framework to address these challenges globally, integrate digital solutions and help you build an operating model that serves and delivers for your organization.



Learn more:

If you would like to receive a personalized Global Mobility Benchmarking report and/or would like to learn more about KPMG Mobility Consulting Services, please email us at tax@kpmg.com.



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