



2023 Global Mobility Efficiencies Survey Report

Before We Begin

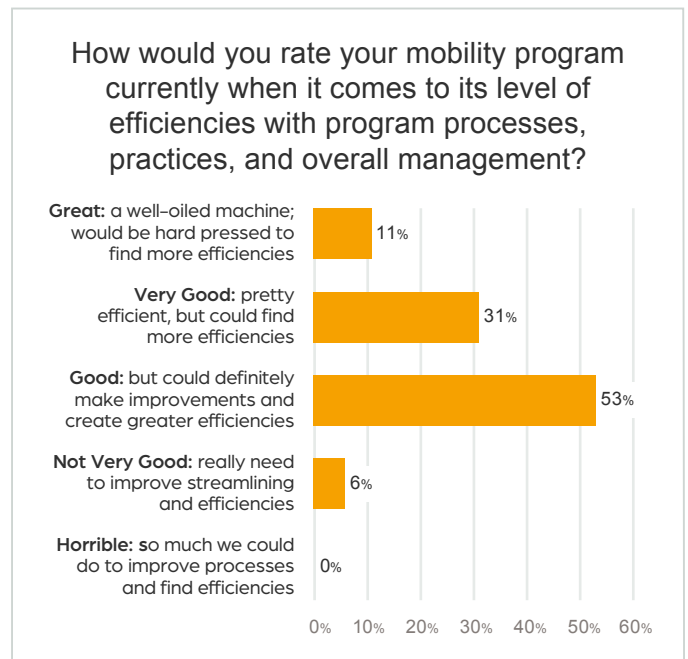
As we entered 2023, Plus published our [2023 Global Mobility Trends Survey Report](#) which shed light on the prevailing sentiments within the business landscape. Despite a slightly improved and more optimistic business outlook, mobility professionals voiced their apprehensions regarding economic challenges and the looming threat of a recession. The survey indicated that almost all participants shared concerns about the U.S. and global economies either being in or heading toward a recession, with a staggering 96% expressing varying levels of concern.

Nearly four out of five mobility leaders were either exceedingly or moderately concerned about the potential repercussions of an impending recession on their global mobility programs. These findings underscore the heightened sensitivity within the industry to economic fluctuations and the need for strategic planning in the face of uncertainty.

Participants in the trends survey expected a recession would impact their mobility programs in several ways, from elevating costs per move to reducing employee satisfaction scores. With the potential for the business environment to deteriorate in 2023 and relocation costs hitting an all-time high in 2022, it was not too surprising to find cost management concerns creeping to the top of the priority list. Top among these concerns was the number one priority for 2023: streamlining mobility programs by finding increased efficiencies.

In fact, 70% of mobility professionals said they needed to evaluate and restructure processes to create more efficient mobility management practices within their program.

Knowing so many mobility teams would be digging into processes and practices to find cost and time savings, we did some digging of our own to determine how Plus Relocation could best serve as a partner in this journey. We conducted a survey to gain a better understanding



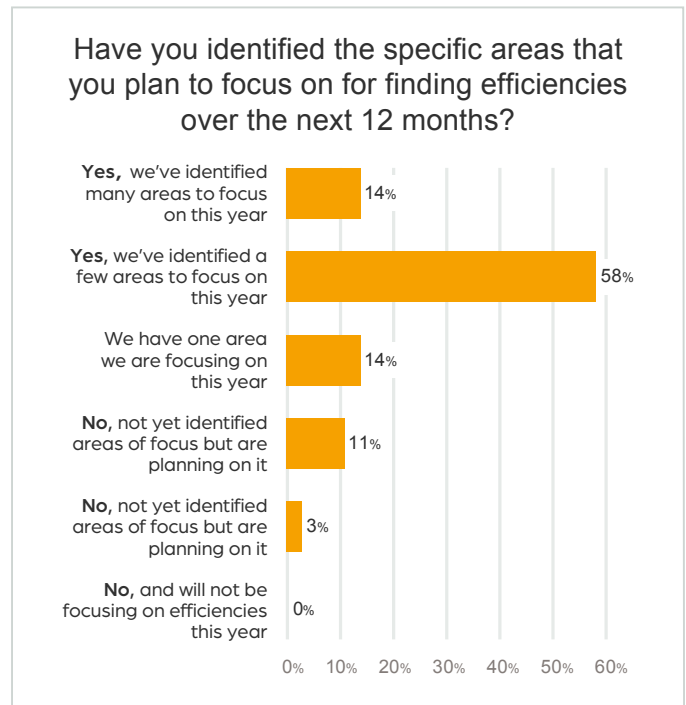
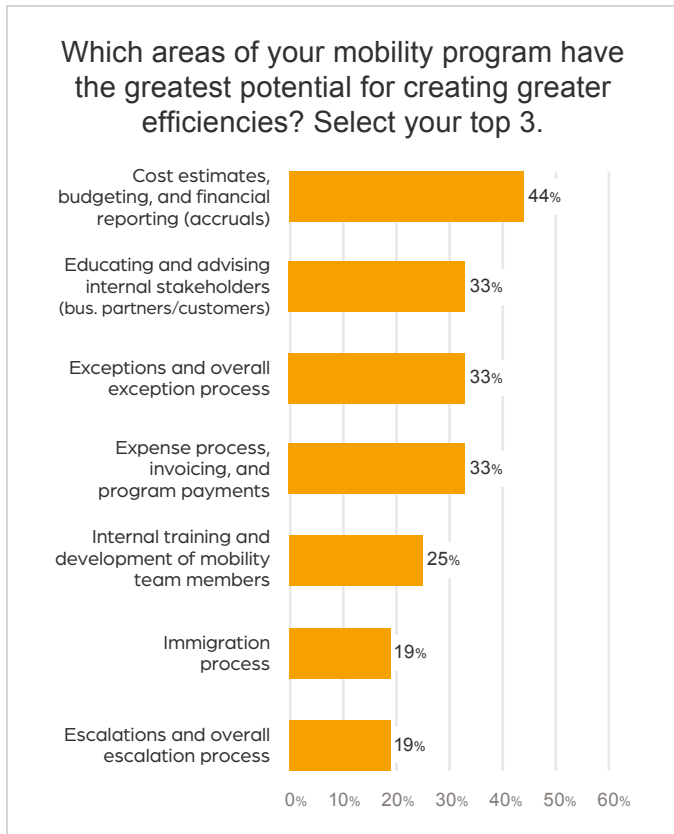
of where mobility programs were planning to focus, how they would go about this process, and even consider the challenges they may bump into along the way.

The Participants and Their Motivation

This report summarizes the findings of our **2023 Efficiencies in Global Mobility Survey** conducted between May 11 and June 15, 2023. This timing allowed participants time to plan for what CEOs had declared as **"the year of efficiency."** With 60 respondents, mainly from large enterprises (5,000+ employees), the survey reflects a collective commitment to streamlining and improving processes. Despite varying starting points, 84% of participants with already effective processes see room for improvement, while 11% consider themselves highly efficient. A smaller group (6%) acknowledges starting from a less favorable position, emphasizing the ongoing pursuit of optimization in global mobility programs.

How Much Will Mobility Teams Bite Off?

To enhance the depth of insights and provide more targeted recommendations, we wanted to understand the extent of effort mobility teams were intending to invest in creating efficiencies and the specific areas they saw as prime opportunities for streamlining.



Participants were asked whether they already had a plan for identifying areas for efficiency gains. The majority (86%) had identified one or more specific areas for focus. Of this group, 58% had identified multiple areas they planned to explore over the next 12 months. Approximately 1 in 10 program managers had yet to identify a particular area to review, while only 3% indicated they would not be focusing on any efficiencies throughout the current year.

Key Insight: Most global mobility program managers not only envisioned the pursuit of efficiencies but had already pinpointed specific areas for exploration and concentration. This trend is unsurprising given the evolving work structures in so many companies, sparking a renewed interest in optimization that has trickled into global mobility programs.

Where Will Mobility Teams Focus Their Efforts?

We then asked mobility leaders which areas of their mobility program had the **greatest potential for creating greater efficiencies**. Cost estimates, budgeting, and financial reporting emerged as the top areas for focus. But three additional areas stood out as having the potential for creating efficiencies including: educating internal stakeholders, managing the exception process, and addressing the financial components of mobility such as reporting and invoice management.

Key Insight: While many of the top pain points are associated with internal communication and processes, the top five pain points center around the reduction of time and effort in training and navigating stakeholder experiences. In addition to the noted top focus areas, respondents offered valuable insights and comments on additional opportunities for efficiency improvement:

- Supporting remote work requests
- Payroll reporting (U.S. and international)
- Global compensation collection and tax reporting
- Overall supply-chain management
- Supporting the recruitment candidate phase
- Creating standards across the globe within the company

"We think we can find greater efficiencies in our tax reporting on expatriate programs, global payroll processing, process that supports flexible benefit selections, and our overall assignment management processes."

"We plan to look at increased coordination between Immigration and Mobility, increased service by and expansion of the Immigration team. We'll look to create/update internal and external communications. Increase automation of processes adjusted/created in the past 2 years in response to the pandemic, hybrid work, and the economic changes."

"New technology to simplify daily processes, TM facing communication, and vendor/internal system integrations."

"Remote work process and streamline using technology and simpler process for the assessment."

Considering the Level of Effort on Specific Types of Mobility

Beyond identifying opportunities for process efficiency, we wanted to better understand what policy or move types were placing the greatest demands on teams in terms of time, energy, and effort. We tasked mobility leaders to rank the level of effort associated with various program types on a scale of 1-10.

Key Insight: It was clear that assignment programs take a greater degree of effort to manage than one-way moves, although whether it is international or domestic is also a key differentiator with international requiring a higher level of effort. Mobility professionals looking for the greatest increase in efficiencies may want to rank their own programs as they explore how to make the biggest impact.

Rate the following move types in terms of the level of effort (time/ energy/ resources) required from your mobility team from beginning to end?

Move Type	Rating
Commuter assignments	8.31
International long-term assignments	8.18
International short-term assignments	7.52
VIPs/Executives	7.47
International relocation (transfer)	7.41
Developmental/rotational assignments	7.06
U.S. domestic long-term assignments	6.76
Employee-initiated relocation	6.45
Virtual assignments	6.22
U.S. domestic relocations	5.69
Interns	5.55
U.S. domestic short-term assignments	5.38
Other in-country domestic relocations	4.9

Who to Include in Creating the Efficiencies?

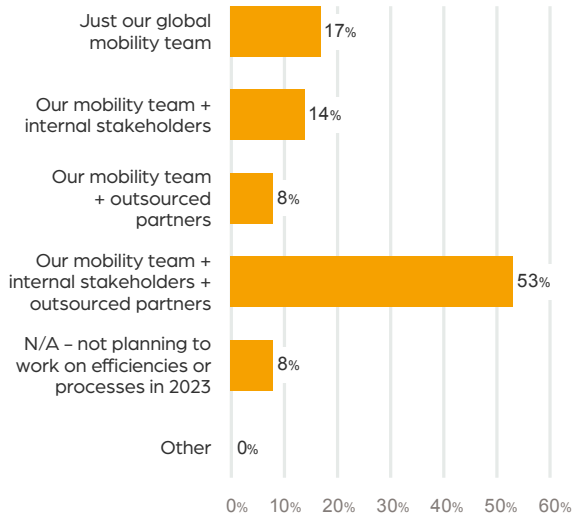
Having identified areas of focus, we next explored the key players involved in efficiency initiatives. Given the collaborative nature often described as the "village" supporting global mobility, we were curious to understand the extent to which mobility teams were leveraging this collective effort. The findings revealed that most participants (61%) planned to combine internal resources with outsourced partners, like Plus Relocation. Others (31%) planned to operate independently, relying solely on internal resources. A select few (8%) were exclusively seeking efficiencies through outsourced partners.

The Role and Potential Impact of Tech on Creating Program Efficiencies

Addressing this topic inevitably involves discussing the pivotal role of technology in driving efficiency improvements. Not surprisingly, most participants (83%) acknowledge the critical role of technology in creating greater efficiencies. However, the strategies for leveraging technology can vary based on the unique characteristics of each program.

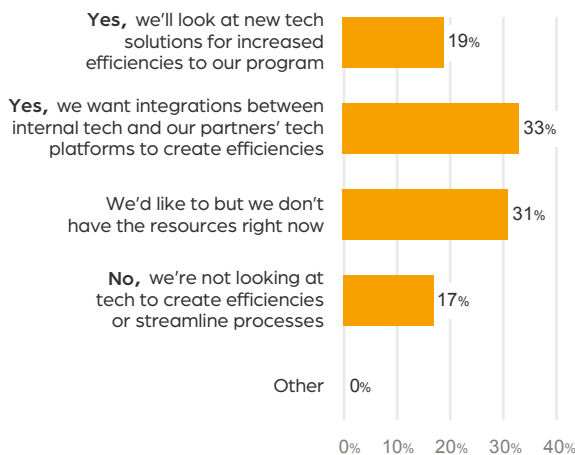
While many are considering integrations (64%) as an efficiency opportunity, 31% cite a lack of available resources for implementation. Despite the increasing role of technology in this context, 17% of participants did not intend to incorporate technology into their efficiency initiatives for the current year.

Who would/will you include in the process for uncovering program efficiencies and process streamlining?



While we asked about integrations, we know that mobility programs are also keenly interested in how ChatGPT and other AI products can support a more efficient mobility program. The Boston Consulting Group estimates a **30% increase in efficiency** among companies that deploy ChatGPT for HR tasks. Even if that projection were high and ChatGPT only drove a 10% efficiency improvement, that translates to a half-day per week that HR practitioners could reclaim. This potential savings makes it difficult to ignore how AI will likely influence mobility programs in the future.

Do you plan to look at technology to help streamline processes for increased efficiencies?



Ultimate Goals Driving the Search for Efficiencies

While we expect many efficiency projects to offer the advantage of increased time savings, thereby aiding organizations in navigating economic challenges, we recognize the value of efficiency extends beyond time and cost savings alone. We wanted to understand all motivators driving the efforts to streamline, so we asked participants what their ultimate goals and desired outcomes were.

Ultimate Goals and Outcomes	
Goal	Selected by
Time savings	78%
Elevate mobile employee experience	75%
Cost savings	72%
Elevate perception of mobility function	58%
Improve the experience of team and stakeholders	58%
Improve the speed to deploy talent	36%
Individual recognition	8%

The renewed emphasis on productivity through streamlined and more efficient workflows this past year has been a key strategic initiative for nearly all mobility programs. Efficiencies can create cost reductions, increased revenues, improved accuracy rates, provide better insights, elevate employee engagement, create a better customer experience, and add a competitive advantage. In our upcoming 2024 Global Mobility Trends Survey (scheduled for release in December), we are eager to determine whether this emphasis on efficiency will remain the top priority or whether programs made a significant amount of progress and will raise up a new top strategic area of focus for 2024.