

The ROI *of* *Global Mobility*

Report 2023



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A note on what we mean by ‘Global Mobility’

Global Mobility has been a part of the business world for so long, it has collected different interpretations depending on who you’re talking to. Some see it as an overlap with international hiring through EORs, others view it as solely business trips or international assignments. To add to that, big shifts like the work-from-home move during the pandemic completely changed how people move for work, leading to the latest transformation we’re seeing now, as Global Mobility starts to reach the agendas of CEOs, directors, and investors. This shift, in fact, is a large part of why we’re doing research on its ROI.

To be on the same page, here’s the definition of Global Mobility that has guided our work: the collective term for different ways companies help their employees move across the world. In this report, we have gathered insights around two examples — relocations and workcations.

Relocations: When employees move across borders and change their country of residence. Companies in our survey offer relocation packages, supporting their people’s needs around visas and immigration.

Workcations: When employees travel for a short term (up to 3 months) to countries outside their permanent residence. For example, workcations enable employees to work remotely and extend their stay in a foreign country after a personal trip.

Global Mobility: the key to unlocking productivity and business growth



Foreword by Hanna Asmussen,
CEO and Co-Founder of Localyze

With 2024 fast approaching, many of us are thinking about those next big moves that will propel the business forward. What will be the winning component that not just strengthens your company's resolve, but slingshots it into success? While tackling this question, I invite every reader, whether you're a CEO, a team lead, an HR professional, or a Global Mobility specialist, to remember the core component that fuels your every move: your people.

Finding the right people, keeping them, nurturing them — if we don't get this right, everything else falls away. As we search for the right strategy, highly skilled talent is giving us the answer: they want flexibility, not just to work from their home, but from wherever they want in the world. They relocate for new opportunities, work abroad as an extension of a personal trip, embark on trips to not just win business, but also develop themselves. They want mobility across the world. This is what we view as Global Mobility, and its influence is growing in the corporate world.

What do companies get in return when they invest in Global Mobility? Not just plugging talent gaps, which are prevalent in Europe, but supercharging business performance and raising profits. Don't take it from me, but from the 240 European business leaders and managers we surveyed on the return on investment they observe from offering their people support with relocations and workcations.

According to them, relocations deliver an ROI gain of up to 270%, where the costs are far outweighed by the impact on productivity, talent retention, and overall profitability. Relocated employees demonstrate higher performance and commitment to the business — a fact that an overwhelming majority (78%) of our respondents confirmed. And nearly half of business owners and CEOs in our survey shared there's a direct correlation between supporting employee mobility across the world and higher company profits.

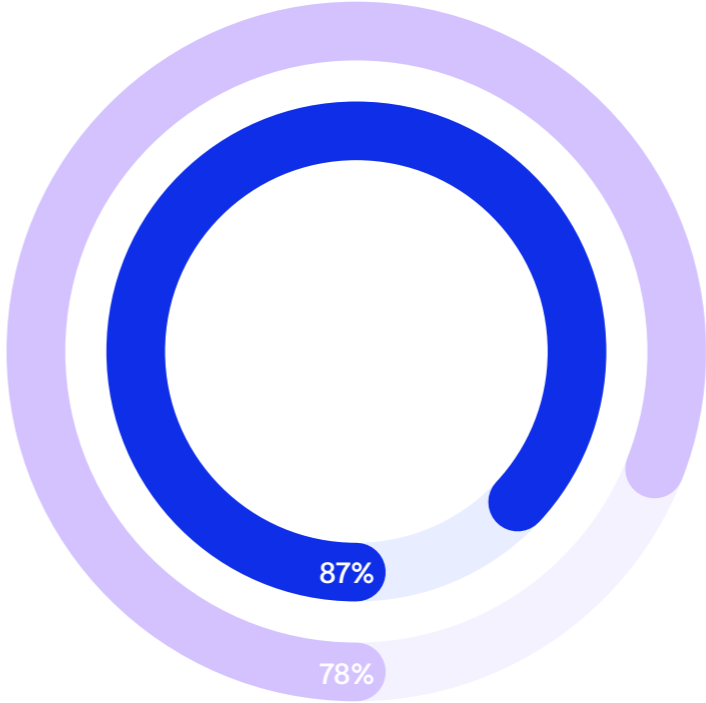
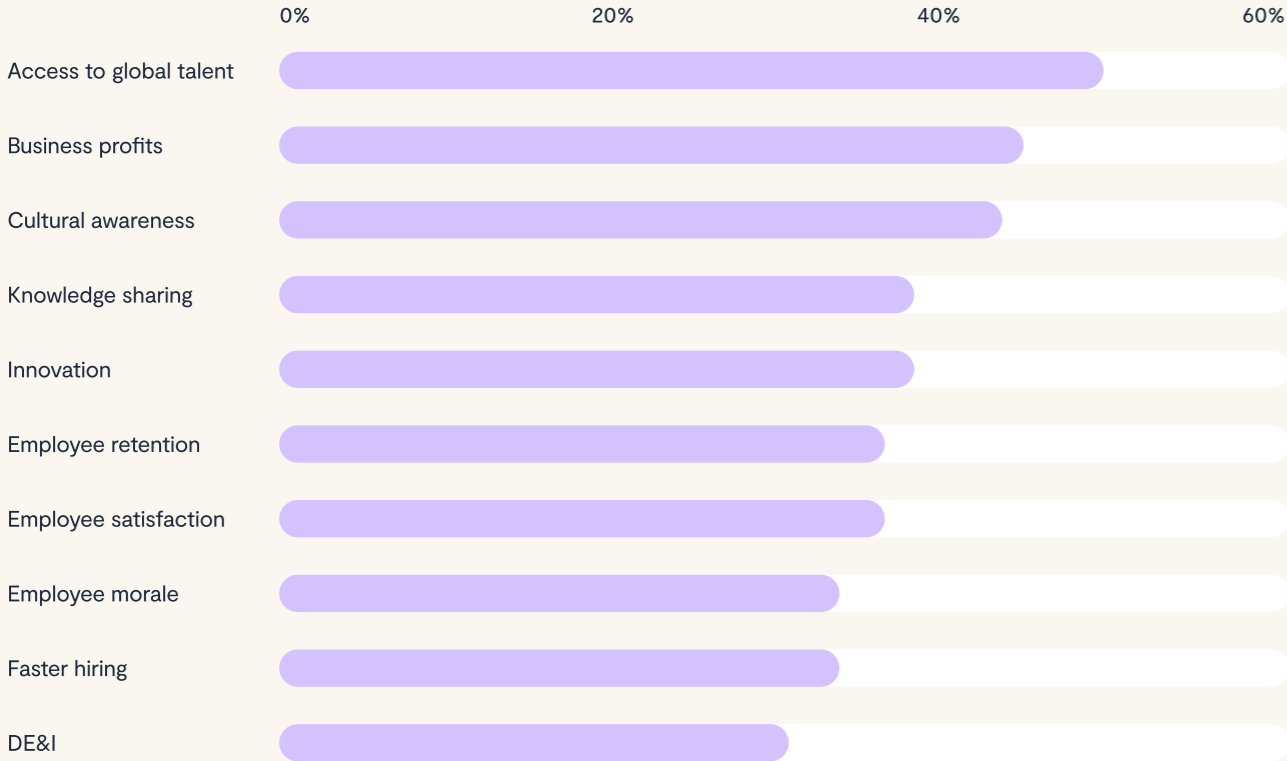
These findings confirm that Global Mobility is not just a luxury perk: it's a vital business enabler. Poised to redefine the very essence of corporate success at a time where the way we work is in flux, Global Mobility offers a unique window of opportunity. This report aims to guide you through the finer details, and explores three key areas:

- **ROI:** Insights into the value of supporting your employees' mobility across borders
- **Benchmarking:** Compare how you manage Global Mobility with other companies
- **Implementation:** A roadmap on how to embed Global Mobility into your company

The future of work is not confined to the office, or to our homes, or even to our countries. It's global, mobile, and borderless, and the businesses that invest in that vision will be the ones to achieve the most growth, be the most resilient, and retain the best talent.

Executive Summary

Which parts of your business operations have improved because of Global Mobility?



- An overwhelming majority of our respondents (78%) said that relocated employees improve their performance at work, and 74% said they were more likely to engage with the company culture.
- According to 87% of respondents, short-term mobility options like workcations also boost employees' job satisfaction.

Global Mobility ROI gains across the board

	All countries	UK&I	Netherlands	Germany
Relocation Cost (mean)	\$26,260	\$22,923	\$31,558	\$24,298
Perceived financial benefit per year (mean)	\$48,660	\$49,144	\$52,581	\$44,249
ROI gain for 1 year	85%	114%	67%	82%
ROI gain for 2 years	270%	328%	233%	264%

What are the top challenges you face when managing Global Mobility?



Our research's key takeaways

Relocated employees demonstrate higher performance and commitment to the business — a fact that an overwhelming majority (78%) of our respondents confirmed. With nearly half of business owners and CEOs in our survey saying there's a direct correlation between mobility benefits and higher company profits, it's clear that Global Mobility is not just a luxury perk; it's a vital business enabler in a world becoming more global by the day.

Relocating employees comes at a cost, but the benefits outweigh them by a large margin. Across the board, respondents reported a high ROI gain of up to 270% when comparing relocation costs to their impact on performance, engagement, and productivity.



Why Global Mobility? *And why now?*

As European businesses face big decisions on how to achieve growth in 2024, how much attention should they give to enabling their employees' movement across borders?

Plenty, and here's why: Global Mobility can be a key component in your decisions around several top-of-mind challenges. Here are just a few examples:

RTO vs Flexibility: What's the right approach for maximum engagement and productivity?

You might think *"If Zoom is bringing their people back to the office, that means working from home is dead."* But the truth is, the work-from-home era is really just beginning, reinventing itself and starting anew as work-from-anywhere. [According to research from EY, flexibility is the new normal in business, with 9 out of 10 workers considering it "extremely important."](#) In the same study, 54% of employees said they would quit a job if it didn't provide the flexibility they needed. Even governments are acknowledging this trend, with more and more European countries offering specialized visas to attract mobile talent. The trend is not to stay in one place, but to move more freely. The companies that lean into this shift can gain a critical advantage over competitors distracted by the "home vs. office" debate.

Retaining critical talent and unlocking their potential

[In one Deloitte study](#), enhancing the employee experience was the No.1 strategic priority of mobility professionals, while 80% of executives rated employee experience as "very important." That said, only 22% of executives said they were "excellent" at creating a differentiated experience for their employees. Global Mobility investments can prove a company's commitment to its employees, which in turn increases engagement and retention — something we explore further in our own research.

Tackling talent shortages amid high levels of competition

Anyone reading this report will be painfully familiar with talent shortages, but the scale of the problem continues to grow with every piece of research or news. In 2022, [Germany's Institute for Employment Research \(IAB\) found 1.74 million vacant positions](#) across the country. [In the UK, four out of five businesses struggle to fill talent gaps.](#) All while [the Dutch government has allocated €123m](#) to tackling the labor shortages in engineering and ICT. As Global Mobility helps retain the talent you already have, offering relocation support can also help bring in the additional talent you need from beyond your usual borders of operations.

Global Mobility has the potential to solve each of these challenges, but there has been little research to quantify its impact. Until now. With this report, we get you up to speed on the value it can bring to the overall business, supported with hard data. Not only that, but we share insights into how to start supporting relocations and workcations with best practices both from our survey results and immigration expertise. Let's dive in.

How Global Mobility delivers measurable ROI

What does Global Mobility do for the business, how does it solve today's challenges? What ROI does it deliver?

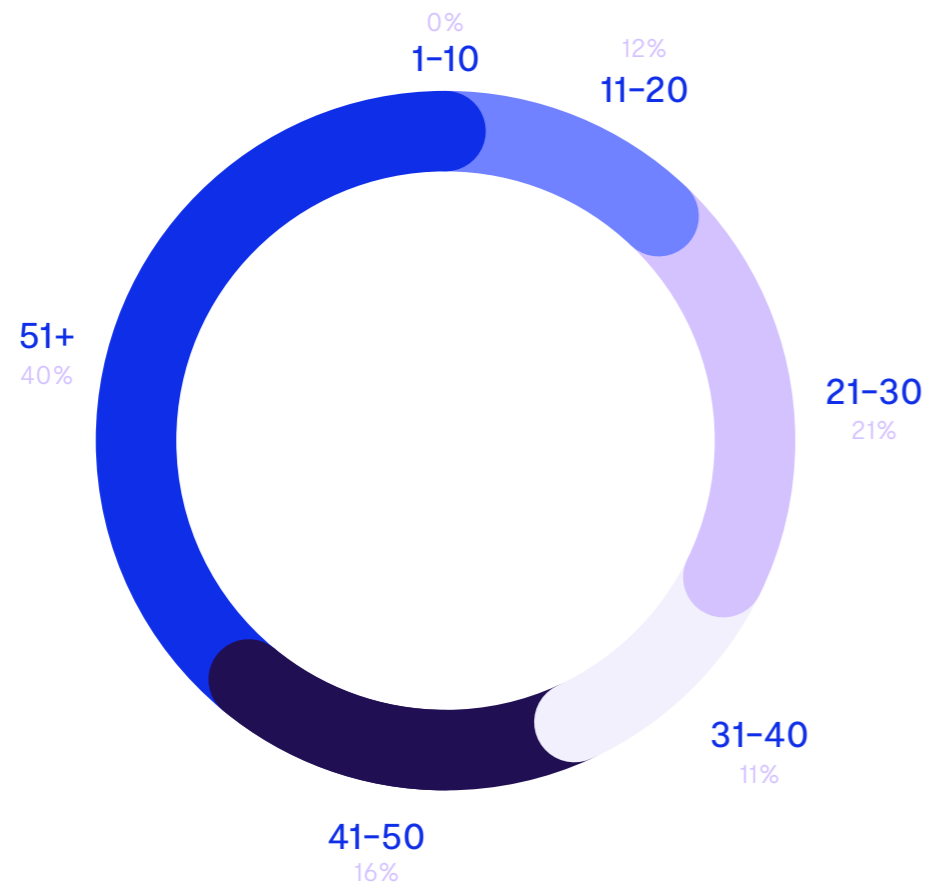
We raised these questions to 240 professionals across the UK, Ireland, Germany, and the Netherlands. Among the respondents are founders and CEOs, team leads and VPs, HR professionals and Global Mobility specialists. They all expressed varied perspectives on Global Mobility, but shared one certain statement:

Global Mobility is not just a luxury perk that takes the stage at times of prosperity. For their companies, it has been a critical business enabler that can supercharge

performance, profits, and culture at times when every advantage can make or break a company.

Enabling employees to move beyond borders for work is something every participant in our survey invests time and money towards. 40% of respondents in the UK, Ireland, and the Netherlands said they go so far as to sponsor more than 50 visas per year — a figure that suggests Global Mobility is offered at scale, enabling the entire company.

How many visas, if any, do you support for employees per year?



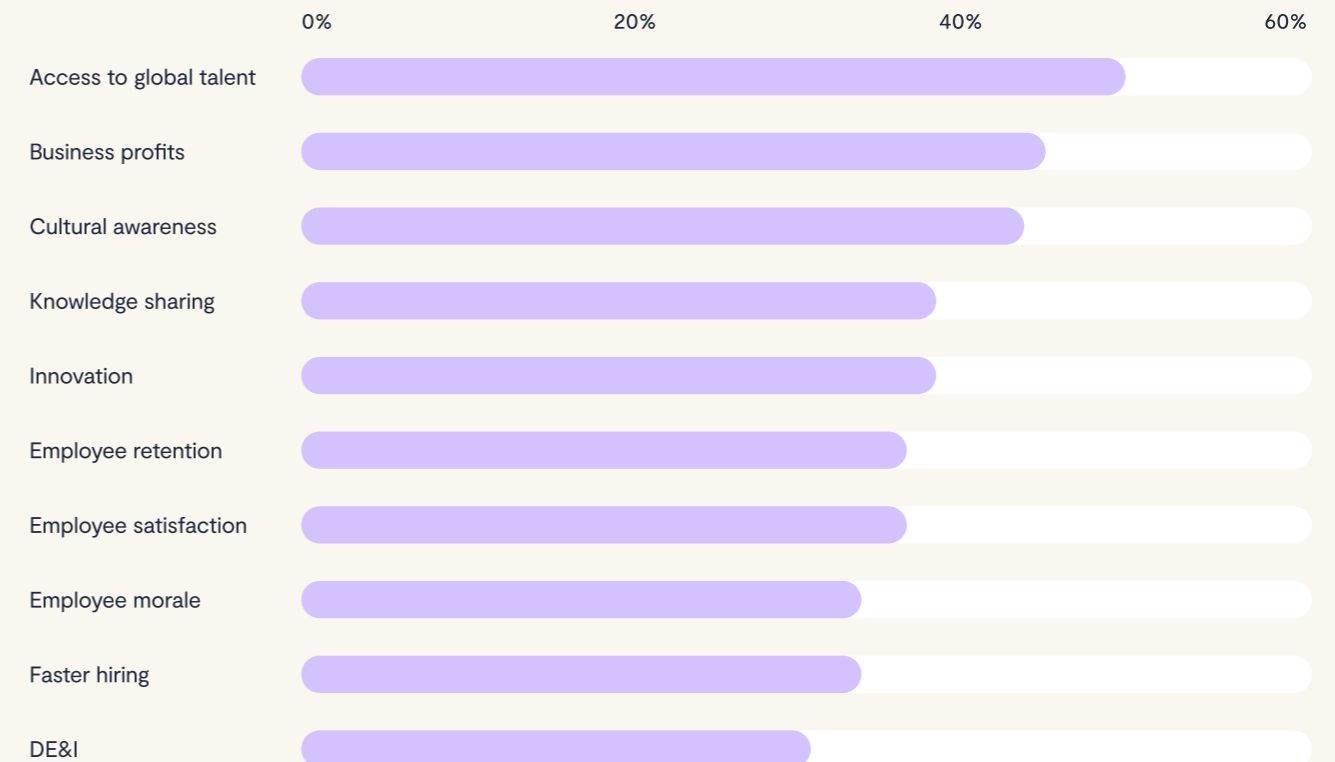
n=202 responses from the UK, Ireland, and the Netherlands

The fact is, committing to moving talent across borders is an investment — and where there's an investment, there should be an attractive level of return. With our research, we capture the benefits Global Mobility delivers, not just to People teams, but the business as a whole.

Let's start with a high-level overview: 51% said Global Mobility expanded their access to talent from around the world. 39% of respondents highlighted higher profits, followed by improved cultural awareness (38%) and knowledge sharing (33%).

What have been the benefits of Global Mobility for your company?

% of people who have selected each option



Few will be surprised to see talent acquisition at the top of this chart — relocations have already started to fill talent gaps for many European companies and tech hubs. [Take Delivery Hero — a staple name in Berlin's tech scene.](#) To sustain its growth, the company leverages relocations to attract talent from outside of Germany and the EU.

But businesses would be remiss to stop at talent acquisition as the main use case for Global Mobility. The benefits go much further than that, influencing companies' bottom line.

In fact, nearly half of the business owners and CEOs in our survey cited a direct link between Global Mobility investments and higher profits. As companies look to supercharge their revenue into 2024, enabling their people's mobility across borders can be a crucial component. Why? Because offering support with relocations and workcations has a direct impact on productivity.

Raising productivity and profits

Global Mobility can positively impact many facets of employee performance, but company culture and productivity stand at the top, according to 38% of our respondents.

These benefits don't materialize only when relocating international talent to an existing hub. They also apply when local talent moves abroad, whether for a short-term trip or a longer-term relocation. An overwhelming majority of our respondents (78%) said that relocated employees improve their performance at work, and 74% said they were more likely to engage with the company culture.

What prompts these results? We've already established that Global Mobility is an investment, but the important nuance is that it's an investment in a company's most important asset: its people. Relocations create opportunities for employees to further develop their careers — a benefit 70% of respondents pointed out — and experience personal growth, a benefit confirmed by 66%.

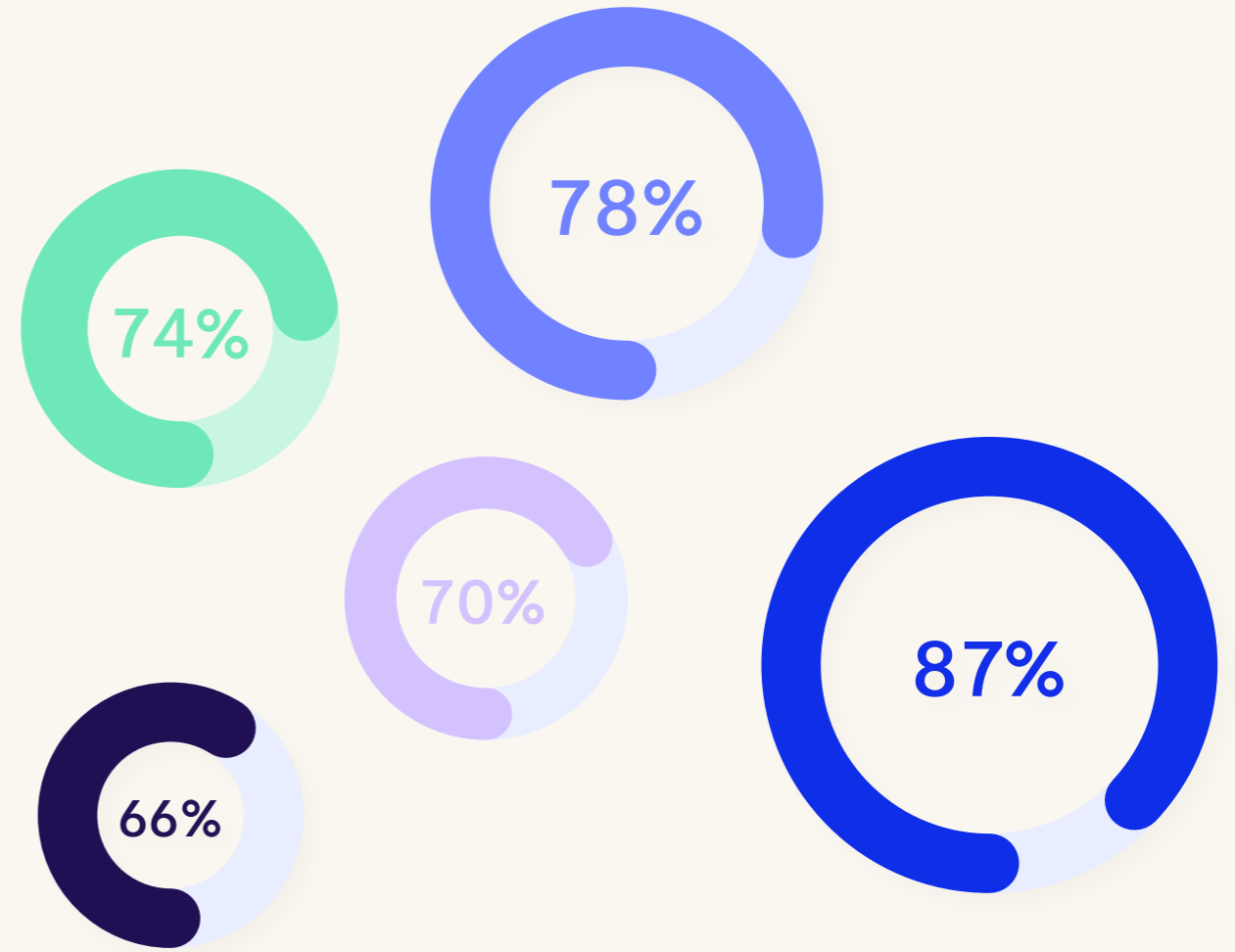
Other examples include increased diversity of opinion and higher compensation and benefits. According to 87% of respondents, short-term mobility options like

workcations also boost employees' job satisfaction. In the end, supporting employees' mobility is a demonstration of trust. Teams commit to sponsoring visas, assisting with moving logistics, and helping their people settle into new locations. By doing this, they say to their employees: "We trust in your potential and value your input to the team — and here are the actions to back that up."

In return, employees invest back into their work and demonstrate higher levels of productivity and engagement. Not only that, but they actively seek out employers who support their development. If that opportunity does not materialize, they do not hesitate to change employers, costing companies much more in the process than a relocation ever would have — a topic we dive into with the next section of our report.



"The market will look elsewhere if you don't offer some flexibility around hybrid and international working." - Reece Procter, Global Mobility Lead at Personio



Respondents said:

- Relocating employees improves their performance at work
- Relocated employees are more likely to engage with the company culture
- Relocations create opportunities for employees to further develop their careers
- Relocations create opportunities to experience personal growth
- Short-term mobility options, e.g. workcations boost job satisfaction

Tackling talent shortages and improving recruitment ROI

Given that talent shortages are a prevalent challenge across Europe, it's important to highlight the top benefit respondents connect with Global Mobility — accessing top talent on a more global scale. This is crucial, because struggling to find a good fit for a new position can make a considerable difference to a company's bottom line. In fact, more than two-thirds of respondents in the UK, Ireland, and the Netherlands said they face this challenge when hiring just locally.

In these three countries, the average recruitment process takes up to six months. The more senior the role, the longer it takes to fill. With that come higher recruitment costs and an inability to close skills gaps.

When companies do fill the position from a limited talent pool, there's the risk of it not being a good match. 82% of respondents from these countries have had a bad hire, while more than a third said they have experienced multiple.

The impact? 44% said choosing the wrong employee harms overall productivity, while 39% said bad hires impact company morale. The damage can spill externally, with 35% confirming that a bad hire has also hurt customer satisfaction.

The financial figures are even more alarming: participants reported that a bad hire could set their companies back \$42,000 on average. The pressure is on to find the right person, and relocating talent to existing hubs is a strategy more and more businesses have started to explore.

Regardless of where respondents were relocating talent to and from, all reported a high return on investment.

We asked them to capture what their mean relocation costs were per relocated employee, and then the financial benefit they observe for each year from their impact on revenue, productivity, and culture.

If we look at all responses, the mean relocation cost is \$26,260, while the mean perceived financial benefit is \$48,660 per year, leading to an ROI gain of 85% if the relocated employee stays for one year. Given that relocations are typically a one-time expense, that ROI gain continues to grow with every year the employee stays at the company — to 270% for a 2-year tenure.

In other words, relocations deliver a near 2X return on their costs in the short-term, and can reach a near 4X return with relocated employees who stay for 2 years. The numbers just keep growing after that.

In the next section we explore how to maximize that ROI even more with the right processes and support.



"We're trying to get the best talent while there's a skilled worker shortage within Europe. Offering a relocation package to candidates outside of Germany has been critical in getting the right people in the door."
 - Lorna Ather, Global Mobility Manager at Delivery Hero



Global Mobility ROI gains across the board

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*Average company size: 1,000 - 2,499 employees | Top 3 represented industries: Software & Technology, Retail, Financial Services

*These calculations are somewhat simplified (for example, the scope of our research doesn't include expenses around other employee support programs), but they still confirm that the companies invested in their employees' mobility see a worthwhile return. For a view of the formula we've used, check out the section Research Methodology.

How to develop a first-in-class Global Mobility experience

While clearly delivering benefits, Global Mobility introduces challenges to People teams and their employees — navigating immigration laws, processing visas, and handling moving logistics, to name a few. For Global Mobility to deliver maximum ROI, it needs to be a positive experience for employees, free of bureaucracy and frustration. It takes work and commitment to build a smooth process, but the teams in our research provided helpful insights about how they manage it.

Keeping in mind that our study is limited to businesses headquartered in Europe, it should come as no surprise that Europe is the most common relocation destination. And yet, slightly more than half of teams also support relocations to North America, with the vast majority going to the United States.

The United Kingdom is the top European destination in our survey, with 59% of respondents having relocated employees there. A close second is Germany (58%), followed by France (44%), Italy (27%), the Netherlands (26%) and Switzerland (24%).



We also found that the most common relocations last between 1-6 months, with 71% of respondents servicing that length of stay abroad. Not to say that permanent relocations were not popular: 50% of respondents said they support their employees for a permanent change.

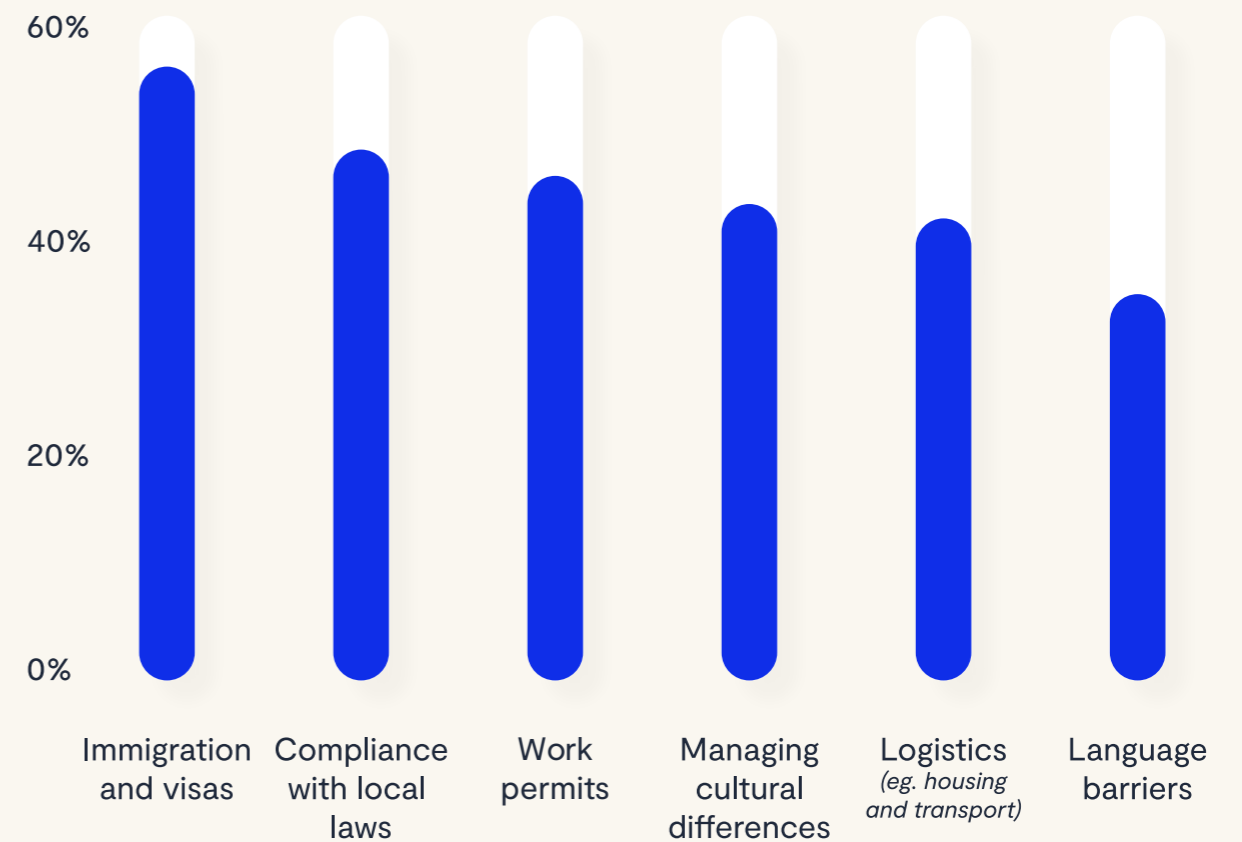
Managing relocations to and from all of these countries involves various immigration tasks, such as applying for visas, work permits, and work authorization documents.

People teams might also need to shoulder the cost for health insurance and other benefits for expat workers. While short-term, workcations can also come with their own set of complications around visas, local labor laws, insurance, and the like.

With this in mind, it comes as no surprise that the top challenges for our respondents are handling immigration and visa tasks, and navigating local laws.

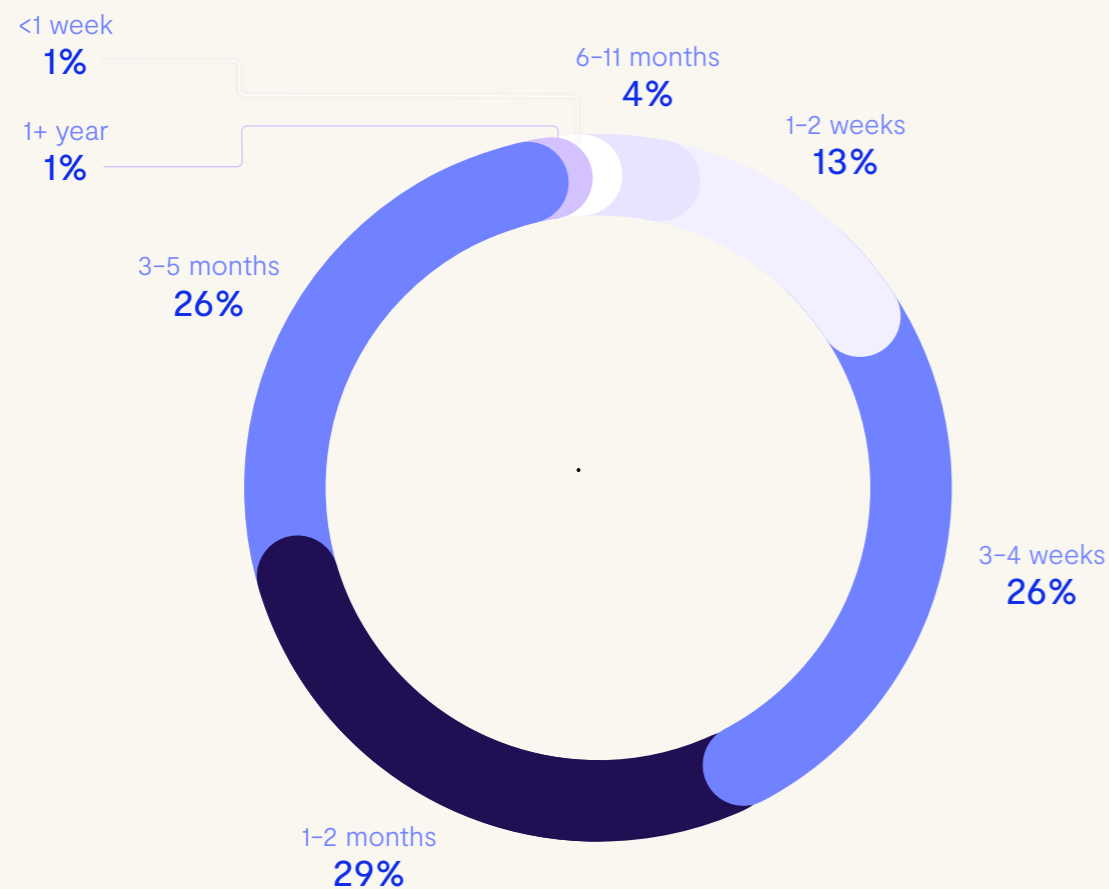
What are the top challenges you face when managing Global Mobility?

% of people who have selected each option



These operational concerns influence how long it can take to successfully relocate an employee, and that varies considerably. While few respondents said the process takes them longer than 6 months, the rest were distributed equally across options lasting between 3-4 weeks and 3-5 months.

On average, how long does it take to handle an employee relocation process?



n=202 responses from the UK, Ireland, and the Netherlands

Having facilitated more than 10,000 relocations, we can say that time frames can be hard to predict because of the variety of factors that can influence each case. The employee's nationality, their destination country's requirements, their professional background and qualifications, whether they're relocating alone or with family — each of these points, and many more, can either speed up or slow down the process. Things can get even more complicated for People teams when applying Global Mobility at scale, where multiple relocations happen at the same time across the whole company.

Perhaps this is why our research reveals that only 26% of teams handle relocation tasks internally, while the rest lean on external help.

"When outsourcing work to external partners, the most positive difference we observe is their specialized expertise," shared Dawn Gartrell, Talent Programs & Global Mobility Specialist at Bitpanda. *"It allows us to navigate complex processes and regulations more efficiently while freeing up our internal resources for core tasks and strategic growth."*



"The biggest challenge is understanding the processes for each country we operate in, but that's the nature of the industry: it's impossible for one person to understand everything even at a basic level." - Dawn Gartrell, Talent Programs & Global Mobility Specialist at Bitpanda

For teams anxious to scale their relocation support to more countries, an external partner can be the key — not just to get the work done, but build up the team's knowledge and guide strategic decisions around policies and processes. *"Organize town halls and trainings on immigration questions with your services provider,"* shared Charles Ullmann, US Immigration Lead at Localize and Licensed US Immigration Lawyer at UX Immigration Law, on how to get maximum value from your external partners. *"Sessions should be geared for different stakeholders (budget owners, hiring managers, recruiters, employees) so they know and understand the importance of immigration processes and requirements. Greater awareness can tremendously ease complications in organizational and case-specific immigration management."*



"The key is reframing immigration not as a cost center or administrative function, but as a strategic asset that allows you to compete for top global talent while protecting the company's reputation and revenues." - Charles Ullmann, US Immigration Lead at Localize and Licensed US Immigration Lawyer at UX Immigration Law

Immigration processes and compliance are undeniably complex, constantly changing, and require specialized expertise. Investing in high-quality, experienced immigration services providers can increase the ROI of your Global Mobility investments, while mitigating exposure to lost opportunities, hidden costs, and unexpected risks.



The TLDR: Global Mobility's impact on businesses and their people

Our research has looked into a wide range of questions to get a clearer picture of Global Mobility to and from Western Europe. But what do all of these numbers mean for different stakeholders in the business?

Global Mobility ROI gains across the board

	All countries	UK&I	Netherlands	Germany
Relocation Cost (mean)	\$26,260	\$22,923	\$31,558	\$24,298
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ROI gain for 1 year	85%	114%	67%	82%
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Business leaders:

Offering your people mobility across the world can raise their productivity and boost company profits

Relocated employees demonstrate higher performance and commitment to the business — a fact that an overwhelming majority (78%) of our respondents confirmed. With nearly half of business owners and CEOs in our survey saying there's a direct correlation between mobility benefits and higher company profits, it's clear that Global Mobility is not just a luxury perk; it's a vital business enabler in a world becoming more global by the day.

Relocating employees comes at a cost, but the benefits outweigh them by a large margin. Across the board, respondents reported a high ROI gain of up to 270% when comparing relocation costs to their impact on performance, engagement, and productivity.

How to win at Global Mobility: In the midst of return-to-office debates, business leaders should think bigger, looking beyond the confines of not just their offices, but their countries of operations. Enable your people's mobility across the world with options like relocations, workcations, and business trips, and build teams of international experts who can support your business long-term.

People teams:

Relocating talent across the world boosts employee engagement and retention, and improves your access to the right talent

Global Mobility has a positive impact on your people — 70% of our survey respondents said relocated employees had gained career development benefits, while 66% said employees experienced personal growth. Even short-term mobility benefits like workcations can have a considerable impact, where 87% said that they had boosted employee satisfaction at their companies. Investing in Global Mobility just makes good business sense — chances are high that if people cannot move freely, they will leave for another employer who can accommodate their wishes. In a world where talent shortages are rampant, losing experts to competitors hurts the business and its bottom line.

Global Mobility also expands your pool of options as you work to fill new roles: this was the biggest benefit team leads cited. If a bad hire could set your company back \$42,000, getting the right person becomes that much more important.

How to win at Global Mobility: Look beyond borders and bring talent to you through relocation support that our survey proves boosts employee morale and engagement. Use these stats to demonstrate the value of your work and get more executive buy-in as you explore how to support your people's movement across borders.

Checklist: How to set up a scalable Global Mobility policy

A good research report wouldn't be complete without recommended next steps on how to actually introduce Global Mobility to your company. To help you navigate complexities and unexpected surprises, we've put together a checklist of topics to consider when you're pitching Global Mobility to your leadership team and proposing new policies.

I. Getting started

Purpose:

Define the objectives and scope of the Global Mobility policy.

Scope:

Document what parts of Global Mobility your company should focus on: relocations, workcations, business trips, assignments, etc.

Roadmap:

Document what steps you need to take to implement a Global Mobility program, how long the project will take, and what resources you'll require.

III. Compensation and benefits

Compensation Structure:

Define how the compensation structure might change after a relocation, including base salary, allowances, and incentives.

Benefits:

Specify the benefits offered to relocation destinations, such as health insurance, retirement plans, education support, and other benefits your company may provide.

Tax Considerations:

Explain the tax implications and any support provided for tax compliance.

VII. Monitoring and evaluation

Policy Review:

Establish a process for regularly reviewing and updating your Global Mobility policy based on feedback and changing needs.

Metrics and Evaluation:

Define key performance indicators (KPIs) and metrics to evaluate the effectiveness and impact of your Global Mobility program.

II. Planning & logistics

Duration:

Outline if there is a maximum/minimum number of days an international move needs to last, including options for short-term, long-term, and extended trips.

Relocation Support:

Document if you will support settle-in services for relocations, including housing, travel, and family considerations.

Legal and Regulatory Compliance:

Describe the process for obtaining any necessary work permits and visas, and staying compliant with local employment laws.

IV. Employee well-being & support

Health and Safety:

Outline measures to ensure employee health and safety abroad, including medical support and emergency assistance.

Cultural Integration:

Confirm if you will provide resources for cultural training and language courses to support employee integration in new locations.

Repatriation:

Outline the process for employees returning from assignments, including reintegration support and career planning.

VI. Diversity, equity, & inclusion (DE&I)

DE&I Commitment:

Emphasize the company's commitment to fostering a diverse and inclusive global workforce.

Equal Opportunity:

Describe how you will ensure that Global Mobility programs are accessible to employees of all backgrounds, genders, and levels.

Research methodology

Survey Data

We collected responses from 240 business leaders and HR decision-makers whose businesses are based in the UK and Ireland, Germany, and the Netherlands, working in companies of varied sizes. These companies have programs that allow employees to work from a different, international location than where they currently live. Our respondents include business owners and CEOs, directors, vice presidents, C-level executives, and senior managers. These professionals operate in various sectors, with the most represented industries being Software & Technology, Retail, and Financial Services.

ROI Calculations

To determine the ROI gains that relocations can deliver, we used this formula:

$$\text{ROI Gain} = \frac{(\text{Perceived financial benefit from relocated employee} - \text{Relocation cost})}{\text{Relocation Cost}} \times 100$$

Acknowledgements

Localize would like to thank the following people interviewed, or quoted, for this guide:



Reece Procter
Global Mobility Lead at Personio



Lorna Ather
Global Mobility Manager at Delivery Hero



Charles Ullmann
US Immigration Lead at Localize and Licensed US Immigration Lawyer at UX Immigration Law



Dawn Gartrell
Talent Programs & Global Mobility Specialist at Bitpanda





About Localyze

We break down borders for companies and their talent

Localyze is the perfect match between intuitive technology and Global Mobility expertise that moves your people to where they need to be.



Operating in EMEA, North America, and across 20 key countries



With over 10,000 relocations worldwide since 2018



Globally compliant and certified platform: ISO 27001, 2FA, SSO

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