



MOBILITY OUTLOOK SURVEY



20
26

IN THIS REPORT

SUMMARY



03

MOBILITY ACTIVITY



04

FLEXIBILITY



08

EVOLUTION



10

WHAT EXCITES MOBILITY LEADERS



12

DEMOGRAPHICS



13

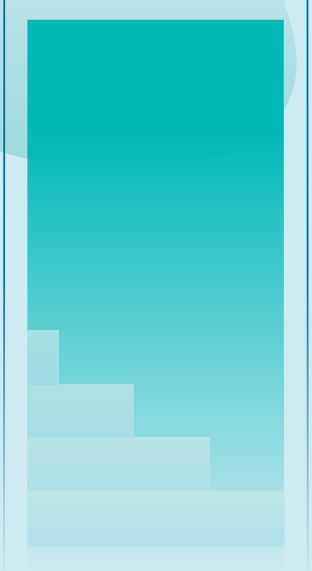


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2026

MOBILITY OUTLOOK SURVEY



Global Mobility is in a period of modernization. While overall mobility activity is expected to remain relatively stable, organizations continue to refine and expand the ways they deploy talent to meet evolving business and workforce needs. At the same time, they are investing in the tools, processes, and capabilities needed to deliver mobility more effectively and position the function for the future.

This modernization is evident in how mobility programs are being designed and managed. Organizations are simplifying policies and processes, investing in technology and AI, and introducing more personalized support while maintaining appropriate governance. Together, these changes are making programs easier to administer, more scalable, and better aligned with business and talent objectives.

This year's results also reflect the continued evolution of the Global Mobility function itself. Participants increasingly see Global Mobility playing a broader advisory role – partnering with HR and the business, supporting workforce planning, and using better data and technology to inform decisions. The emphasis is not on doing something entirely different, but on delivering mobility more effectively and demonstrating greater value to the organization.

The 2026 Mobility Outlook Survey explores the vital signs of mobility programs, including overall volume trends, policy usage and flexibility, and takes a glimpse into the future to hear what organizations will be focusing on in the next year and beyond.

MOBILITY ACTIVITY

Mobility activity remains steady while organizations continue to diversify the ways they deploy talent and expand the scope of their mobility programs.

VOLUME

Mobility activity has largely stabilized, and expectations for significant growth have moderated compared with previous years.

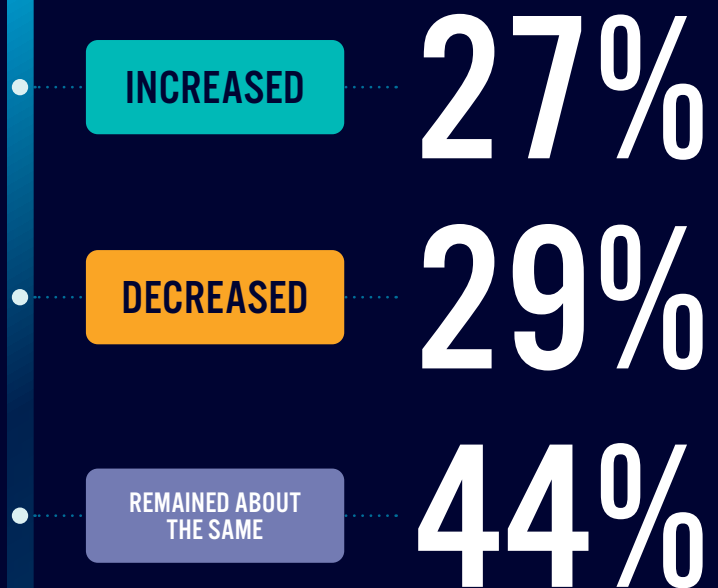
POLICY USAGE

While traditional policy types remain prevalent, organizations are supporting a **broader range of mobility approaches** to address evolving business and talent needs.

POLICY EXPANSION

Although most companies feel their current policy suite is well suited to their organization, **one third of organizations are expecting to use new or different types of mobility** outside of their current policy options. This trend reflects both broader mobility offerings and Global Mobility's expanding role in supporting domestic mobility, business travelers, commuters, and other types of talent deployment.

In the past year, has your overall global mobility activity (assignments, transfers, etc.) increased, decreased, or remained the same?



In the upcoming year, do you expect your overall global mobility activity (assignments, transfers, etc.) to increase, decrease, or remain the same?

● INCREASE ● DECREASE ● REMAIN THE SAME

2022



2024



2026

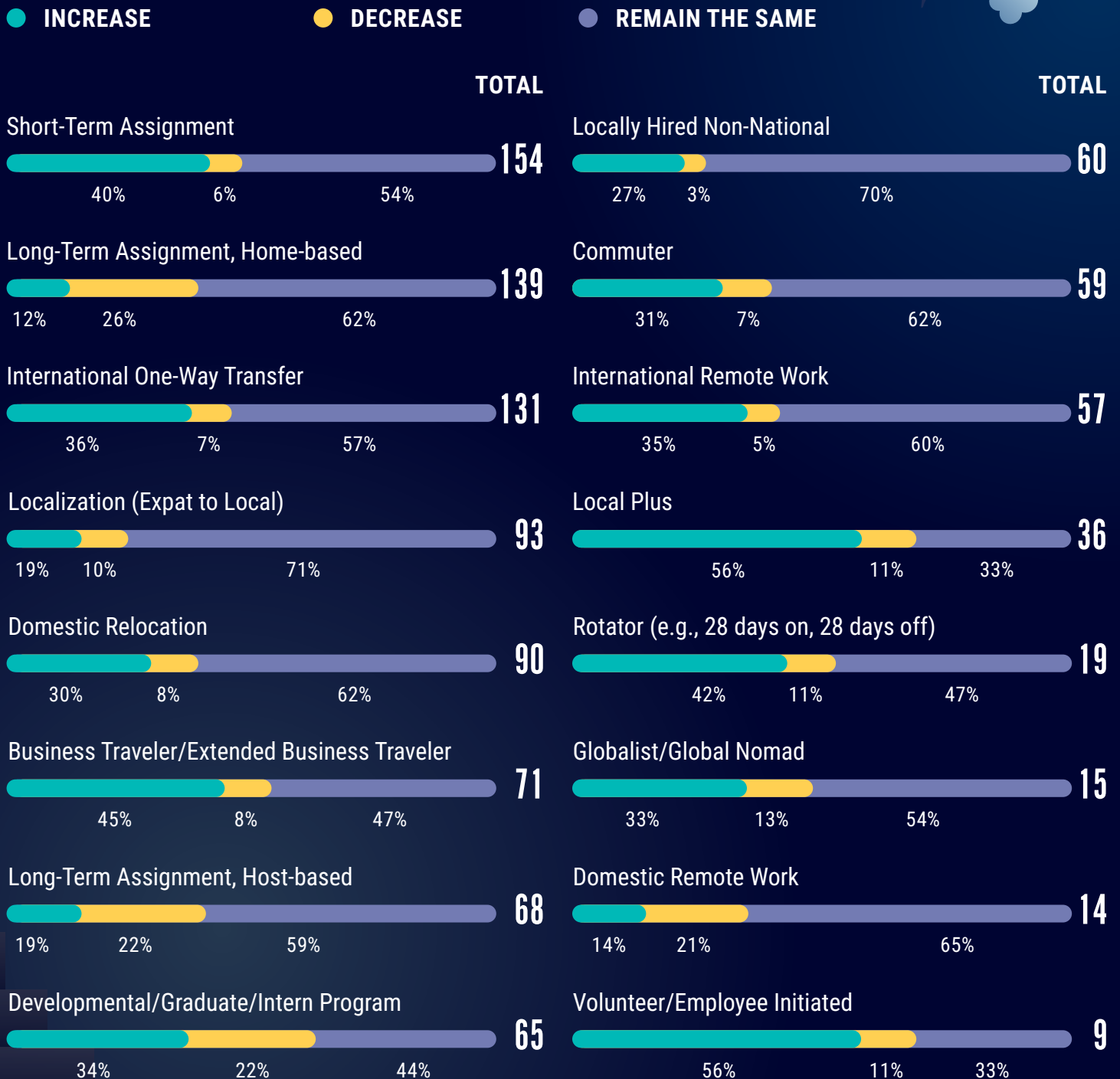


What policies do you currently have in your mobility suite?

Select all that apply.

	%	COUNT
Short-Term Assignment	86%	154
Long-Term Assignment, Home-based	77%	139
International One-Way Transfer	73%	131
Localization (Expatriate to Local)	52%	93
Domestic Relocation	50%	90
Business Traveler/Extended Business Traveler	39%	71
Long-Term Assignment, Host-based	39%	70
Developmental/Graduate/Intern Program	36%	65
Locally Hired Non-National	33%	60
Commuter	33%	59
International Remote Work	32%	57
Local Plus	20%	36
Rotator (e.g., 28 days on, 28 days off)	11%	19
Globalist/Global Nomad	8%	15
Domestic Remote Work	8%	14
Volunteer/Employee Initiated	5%	9
TOTAL PARTICIPATING COMPANIES		180

For companies that currently offer these policies, do you expect usage to increase, decrease or remain the same next year?



Have you been using, or are you expecting to use, new or different types of mobility outside of your current mobility suite?

YES

34%

NO, OUR CURRENT
MOBILITY SUITE
FITS OUR NEEDS

66%

If yes:

COMMUTER

Most frequently mentioned.

Many organizations are introducing or formalizing commuter policies, including short-distance commuters and commuter arrangements alongside STAs.



BUSINESS TRAVELERS/ EXTENDED BUSINESS TRAVELERS (EBT)

A common area of focus.

Several organizations are creating formal Business Traveler or EBT policies or bringing these populations under Global Mobility.



LOCAL PLUS

Mentioned as either a new policy or an area under development, reflecting continued interest in alternatives to traditional expatriate assignments.



DOMESTIC MOBILITY

Several respondents are expanding Global Mobility's scope to include domestic relocations or domestic assignments, particularly within the U.S.A.



SHORT-TERM ASSIGNMENTS (STA)

A number of organizations are adding or revising STA policies, including domestic STAs.



VIRTUAL ASSIGNMENTS/ CROSS-BORDER REMOTE WORK

Mentioned by a smaller group, generally as policies under development or managed on an exception basis rather than as mature programs.



INTERNATIONAL ONE-WAY TRANSFERS

A handful of organizations are reviewing or expanding permanent transfer approaches, including employee-initiated moves.



OTHER

Other types of mobility mentioned include Rotational Programs, Localization, Developmental Assignments, and International External Hires.

FLEXIBILITY

Flexibility is a standard feature in most mobility programs. Organizations often leverage more than one approach to personalize support for the employee and provide flexibility for the business.



PERSONALIZATION

Cash-based support remains the most common way to tailor support to employee needs; however, many organizations continue to rely on case-by-case flexibility and exceptions management.



BUSINESS NEEDS

Most organizations balance flexibility with governance by relying on **standardized policy frameworks while allowing targeted customization** based on assignment or business needs.



COLLABORATION

Decisions about flexible support are often made **collaboratively between Global Mobility, HR, and the business, reinforcing Global Mobility's advisory role**. At the same time, nearly one-quarter of organizations report that Global Mobility determines the appropriate level of support, reflecting a growing level of ownership and decision-making authority.



ADMINISTRATION

Delivering flexible mobility programs requires the right processes and technology to balance flexibility with consistency. The continued reliance on exceptions management suggests many organizations are still refining how flexibility is administered.

In which of the following ways does your organization provide employee flexibility and/or personalization of mobility support?

Select all that apply.

	%	COUNT
Lump sum or cash-based support	40%	73
Case-by-case flexibility/exceptions management	39%	70
Core/flex policy design (standard benefits with customizable options)	31%	56
We do not currently offer significant flexibility/personalization	27%	48
Employee choice between cash and managed services	22%	40
Personalized support based on employee/family needs	22%	40
Managed cap/budget (employee can request services/support up to a capped budget)	12%	21
Flexible support for remote, hybrid, or cross-border work arrangements	7%	12
On-demand or self-service mobility support/tools	5%	9
Menu-based/flex points (employee can "spend" points on services/support of their choosing)	3%	5
TOTAL RESPONDING COMPANIES		181

How do you structure flexibility within mobility support for the business?

Select all that apply.

	%	COUNT
Standardized policies based primarily on assignment duration	55%	99
Multiple policy types based on assignment purpose, employee segment, or business need	43%	77
Core/flex approach with core benefits and optional/additional support	28%	50
Tiered support levels based on job level or talent segment	23%	42
Flexibility managed primarily through exceptions or individual negotiation	20%	36
Guideline-based approach allowing tailored support by situation	14%	26
Case-by-case support with limited formal policy structure	9%	17
TOTAL RESPONDING COMPANIES		181

If you offer multiple policy options or flexible mobility support, who typically determines which level or type of mobility support applies?

Select all that apply.

	%	COUNT
Decisions are made collaboratively between Global Mobility, HR, and the business	40%	70
Global Mobility provides guidance, but the business makes the final decision	40%	70
Global Mobility determines the appropriate level or type of support	24%	43
Determined primarily through policy rules/automated criteria	20%	35
N/A, we don't offer flexible approaches	14%	25
Handled on a case-by-case basis	11%	19
The employee selects support	6%	10
The business selects the support with minimal Global Mobility involvement	3%	6
TOTAL RESPONDING COMPANIES		176



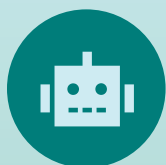
EVOLUTION

Global Mobility is continuing to modernize, with organizations focused on strengthening the function's role as a business partner, leveraging technology, and improving how mobility programs are delivered.



TRUSTED ADVISOR

Global Mobility continues to strive to evolve beyond program administration toward a **greater role in workforce and talent planning**. This is by far the most common expectation for how the function will evolve over the next 2–3 years.



TECHNOLOGY & AI

AI and automation are expected to have the greatest impact on **reporting, analytics, and employee communications**, suggesting organizations see AI as a tool to improve execution, decision-making, and operational efficiency.



BUSINESS PRIORITIES

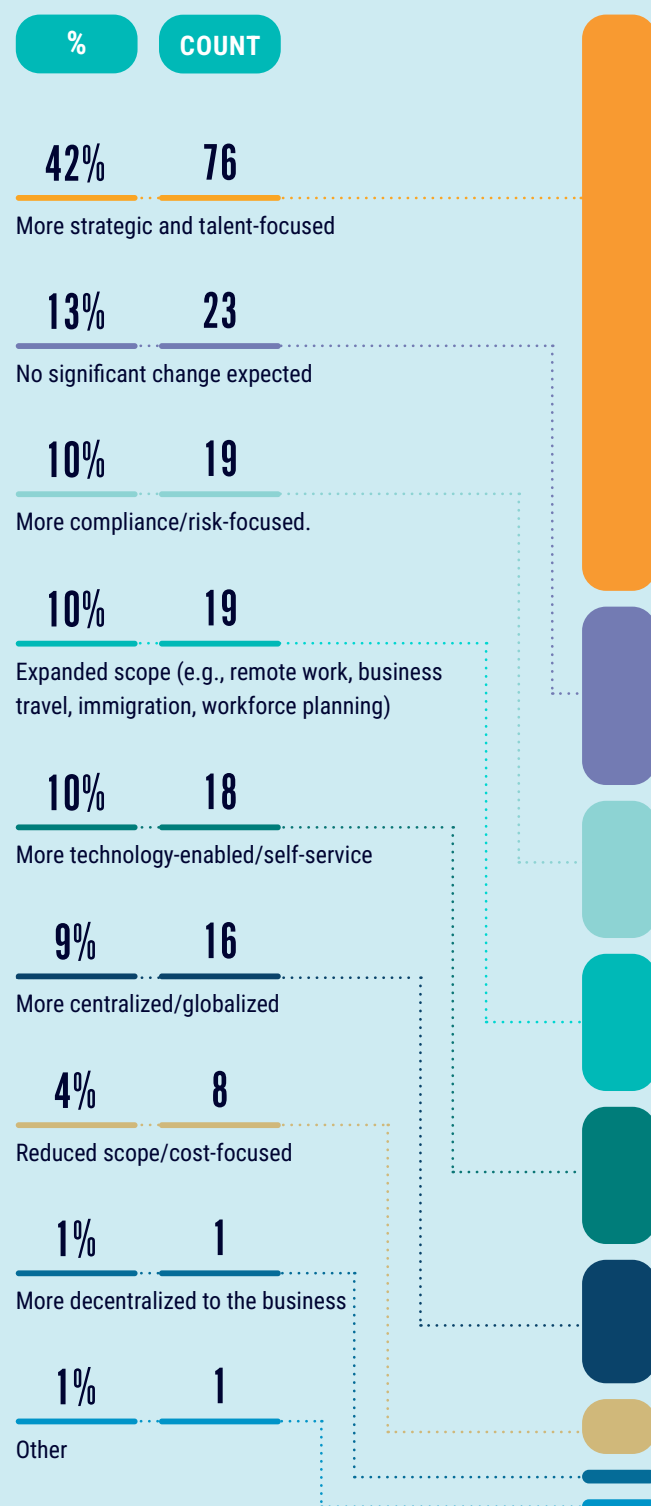
Organizations' priorities for the coming year reinforce this direction, with the greatest **emphasis on talent strategy alignment, technology enhancements, and simplifying program administration**.



FUTURE DIRECTION

Rather than fundamentally redefining the role of Global Mobility, organizations are investing in the capabilities, tools, and processes to make programs more **efficient, scalable, and business-focused**.

How do you primarily expect the role of Global Mobility within your organization to evolve over the next 2–3 years?



In which areas do you expect AI and/or automation to have the greatest impact on your mobility program over the next 2–3 years?

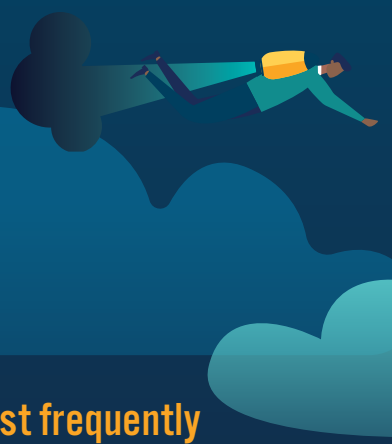
Select up to three.

	%	COUNT
Reporting and dashboards	59%	107
Cost projections and analytics	48%	87
Employee communications/ chat support	40%	72
Policy administration	27%	48
Compliance monitoring	18%	33
Unsure/still evaluating	18%	32
Assignment decision support/ talent insights	9%	17
Tax and payroll processes	8%	14
AI will have limited impact on our program	7%	12
Vendor management	5%	9
Immigration coordination	3%	6
TOTAL RESPONDING COMPANIES		180

What is your top Global Mobility priority for the next year?

	%	COUNT
Aligning mobility with workforce and talent strategy	20%	36
Enhancing technology, automation, and digital tools	18%	33
Simplifying policies and program administration	12%	21
Advising and enabling the business more strategically	10%	17
Expanding or evolving mobility program offerings	6%	11
Strengthening compliance and risk management	6%	11
Enhancing operational efficiency and scalability	6%	11
Improving employee experience and personalization	5%	9
Managing cost and demonstrating value/ROI	5%	9
Increasing agility/speed to deploy talent globally	4%	7
No major changes planned	4%	8
Reviewing or optimizing external partnerships/providers	2%	3
Other	2%	4
TOTAL	100%	180

WHAT EXCITES MOBILITY LEADERS



And finally, we asked participants what they are **most excited about in their Global Mobility program**. Their responses point to a forward-looking function focused on stronger business partnerships, better technology, greater efficiency, and new approaches to supporting talent.

Organizations are pursuing these goals through changes ranging from targeted program enhancements...

"Working with our business to create a developmental assignment structure that can support talent retention and encourage growth."

North American Financial Services Firm

"I am excited about the opportunity to align talent analytics with Mobility for improved talent management discussions."

North American Tech Company

... to broader transformation efforts.

"We are excited to elevate our program to align with our talent management framework and people philosophy, enabling more intentional assignment planning and a more strategic relationship with the business, both leading to improved ROI."

APAC Pharmaceutical Company

"We are excited about enhancing the strategic impact of our Mobility program while strengthening cost management and leveraging data and automation to enable better decision-making."

APAC Consumer Goods Company

AI was one of the most frequently mentioned themes...

"Integration of AI through company-sponsored AI tools. Implement more automated, efficient chat bots, tools, dashboards, etc."

North American Automotive Company

"AI, and how we can use AI tools to simplify work and be more efficient, freeing up time away from administrative tasks to focus on how we can be more strategic in our interaction with the business in how we mobilize talent."

EMEA Pharmaceutical Company

...along with technology more broadly.

"I'm excited about fully utilizing Mobility Technology and rethinking the traditional assignment approach – leveraging technology, automation, and digital tools to create a more agile and responsive function where we can move forward from traditional assignment types and apply flexible, compliance-based, future-focused mobility solutions."

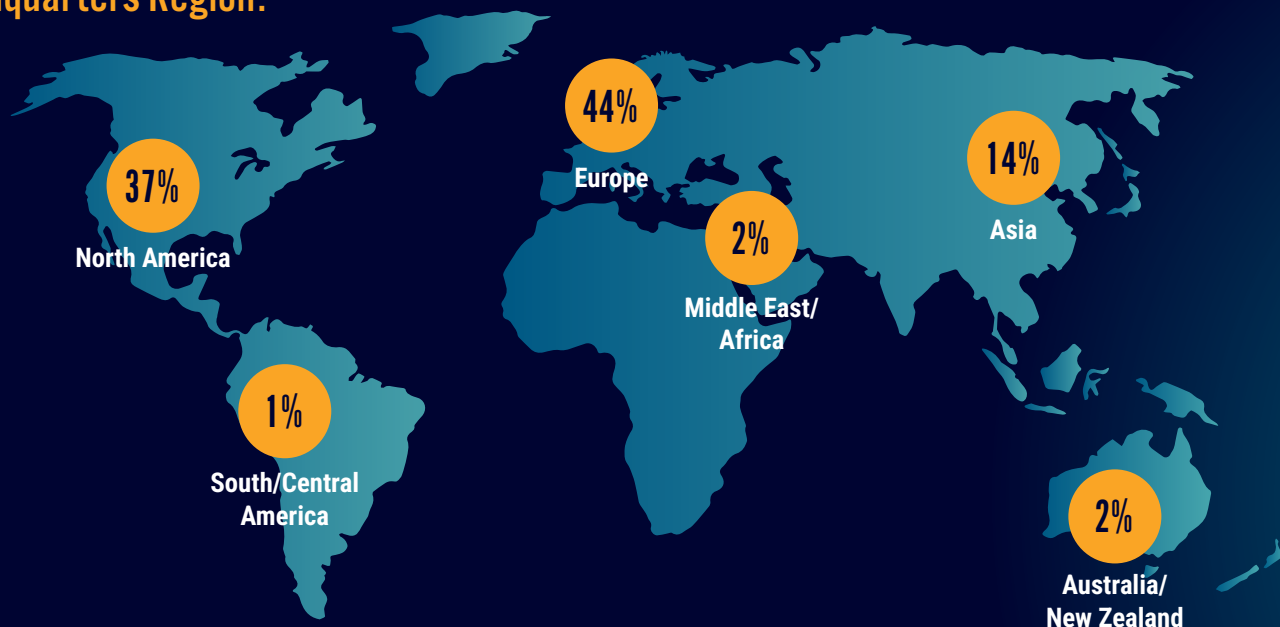
EMEA Energy Services Firm

Together, these comments reflect a dynamic period for Global Mobility. While its core purpose remains the same, the way mobility is designed, delivered, and supported continues to evolve. The future is less about reinventing mobility than making programs smarter, simpler, and better equipped to support an increasingly complex workforce.

DEMOGRAPHICS

181 best-practice organizations participated in the survey.

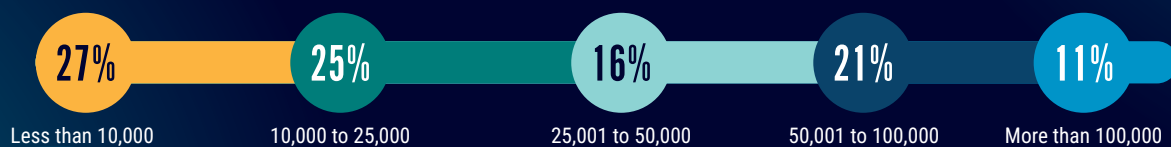
Headquarters Region:



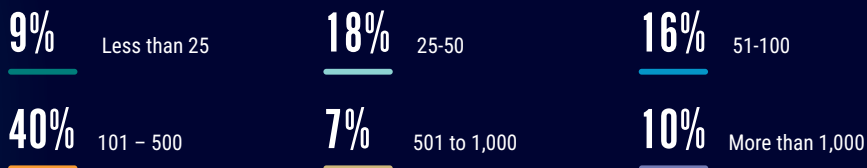
Top Industries Represented:



Total # of Employees:



of International Assignees & Transfers Per Year:



International Assignees as % of Total Workforce: Average 1.4%

Males vs. Females on Assignment:



Partial List of Participating Companies

adidas	Expedia Group	Nestle	SLB
Anglo American	EY	New Development Bank	SODEXO
AngloGold Ashanti	Ferring Pharmaceuticals	Nokia	SOLVAY
Aon	Flutter Entertainment	Novartis AG	Standard Chartered
Apache Corporation	FM	nVent	Swiss Re AG
ARaymond	Freshfields	Opella	Syensqo
Archer Aviation	Freudenberg Gruppe	Otis	TDK
Aristocrat Technologies, Inc.	General Motors	Pearson	Tetra Pak
AstraZeneca UK Ltd	Grünenthal Pharma GmbH & Co. KG	Pearson Benelux Swiss Branch	Teva
AtkinsRéalis	Hanwha Energy USA	Petrolia Nasional Berhad (PETRONAS)	Textron, Inc.
AXA	Hanwha Ocean	Pfizer Inc	The Advantage Global Management Group (Cyprus) Limited
BASF	HelloFresh SE	Philip Morris International	The Boston Consulting Group
Bayer AG	Howden	PHOENIX Pharma SE	The Clorox Company
Bekaert	Hoya Vision Care	Pinsent Masons LLP	The TJX Companies
Beko Global	Infineon Technologies AG	Plaza Premium Group	TotalEnergies
BIC	Insulet	Prysmian	UBS
BOC Aviation Limited	International Motors, LLC	PSP Investment	UEM SUNRISE BERHAD
bolttech	International Rescue Committee	PT Medco Energi Internasional Tbk	Unilever
BP	JD Irving	Publicis	UnitedHealth Group
CAF	JLR	Repsol	UPS
CFAO	JTI	Rio Tinto	Vertex Pharmaceuticals
Chanel	KWS	RSM US LLP	Vertiv
Coinbase	LANXESS Deutschland GmbH	Schindler	Vodafone
CSL	LBBW	Sensata Technologies	Wells Fargo
Databricks	Lesaffre International	SFS Group Schweiz AG	Wood Group
Deutsche Telekom Services	Mavenir Systems Inc	Shangri-La Group	Yara International ASA
DoorDash, Inc.	Micron Technology Inc	Shell	Zuellig Pharma
Enbridge Inc.	NBCUniversal	Shiseido Company, Limited	
Endeavour Group	NEC	Sime Darby Group	
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