

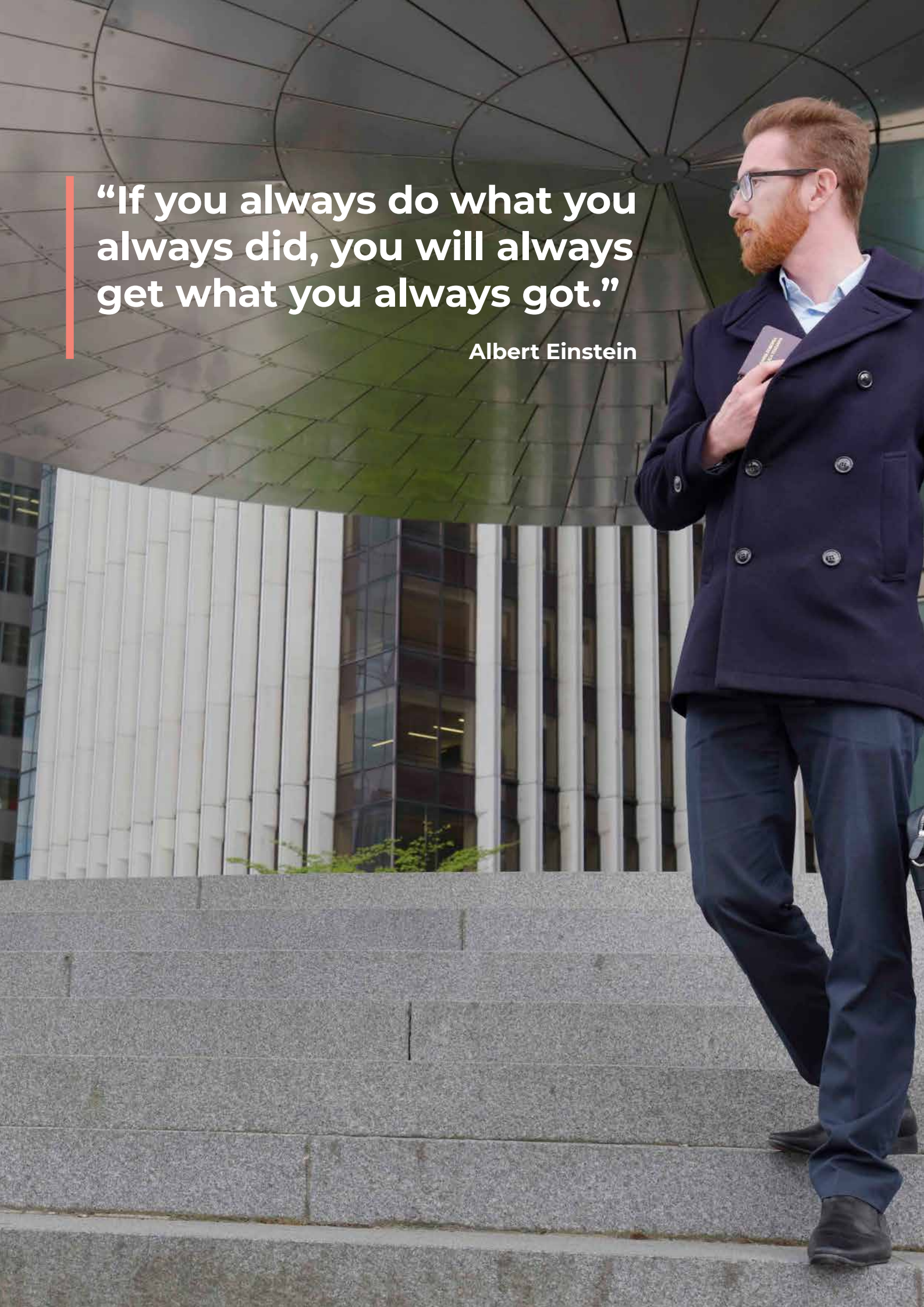


World Mobility Perspectives

Big global mobility trends to watch in 2019

How the world works better

CROWN 
WORLD MOBILITY



“If you always do what you always did, you will always get what you always got.”

Albert Einstein

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Introduction

A new year gives us the chance to reflect on, and anticipate, how global mobility is responding to the world in which it operates. The World Economic Forum's annual meeting in Davos, Switzerland is one of our favorite starting points; it brings together the minds of corporate and government leaders with innovators and technology, cultural and societal leaders. This year's theme has been termed "transformation" and that, too, is a fitting theme for global mobility.



We continue to live and work in political uncertainty, with Brexit's future still being negotiated, trade tensions impacting global business and nationalism emerging in a number of countries. And yet, we live and work in incredible optimism, with a global wave of commitment towards social and environmental responsibility. We are firmly ensconced in a digital world; highly connected with technology driving us to innovate new ways of working and communicating – and driving inevitable shifts in business models and workforce values.

We also live with the reality of an increasingly younger workforce. And in the few countries where this isn't the case, there is an urgent need to find alternative workforce solutions. The youthquake of global talent is forcing most companies to shift values, cultures and strategies.

Global mobility has not historically been at the forefront of adopting new ways of working but in 2019 it is left with no choice. We must take notice, embrace recent disruptions and prepare for what's to come.

Every year we highlight emerging trends and update some evolving topics from previous years. Crown World Mobility's 2019 trends shed light on how companies and our industry are responding to and, in some cases, driving today's transformation with significant change.

Big trends to watch list



The increasingly important employee experience



Dual-career couples



Technology to supplement, simplify and enhance



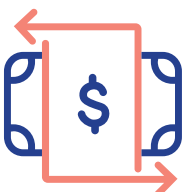
Employee well-being and duty of care



Global mobility in the advisor role



D&I Mobility: Making global careers more accessible



Flexibility and choices

The increasingly important employee experience

There are few industries that don't have "employee experience" on their 2019 trends list. Driven by a growing recognition that employees' expectations are evolving, there is a greater need to offer an engaging, emotional, human-centered experience in the workplace. This is especially true at critical, "pivotal" moments, like recruiting, onboarding, career planning or exiting the organization. Embarking on an international assignment/location change is another of these moments.





Today, companies are raising the bar with creative ways to engage and retain talent, and improve the employee experience in global mobility.

At pivotal moments within the lifecycle of a temporary or permanent move, companies that are focused on the employee experience will have an infrastructure in place to provide the information and support specific to the transition underway. For example, at the start of a move, companies are increasingly building on onboarding strategies to ensure that mobile employees receive an orientation, understand their points of contacts, the resources available and a timeline of what to expect and when it will happen.

Even before the start of a move, some companies recognize the criticality of an informed decision-making process. Many are providing managers with selection guides to identify more qualified candidates, and self-assessments for employees and family members. They are also developing formal and informal ways to get to know the destination, financial implications of a move, quality of life in the new location and relocation services made available to the employee.

There are many onboarding ideas, offering a “soft landing” to the employee and family at the start of an assignment or relocation – policy orientations, new location “Welcome Packs,” cross-cultural training or destination services – but today we are seeing more creative ways to supplement the traditional approaches.

When developing new ways to support onboarding, it is important to provide guidelines and get buy-in to ensure you have a consistent global platform – even if local nuances are adapted for cultural fit.

Though location and other factors influence what approaches apply, a few general examples include:

- Developing a basic guide for the receiving manager and new destination team to ensure consistent and thorough onboarding. Includes what needs to be ready for the employee’s arrival and any activities that should be scheduled to ensure the employee meets people quickly, gets up and running and is productive on the job.
- Providing points of contact for the employee and accompanying partner. Be creative; one company recently used polaroids to introduce key team members in their welcome kit.
- Exploring low-cost ways to help the employee/family get to know the new location and feel welcome. Set up popular local apps, download maps, use scavenger hunts, schedule a bike or foodie tour to celebrate the employee’s first 30 days, etc.

One long-standing best practice, that is also becoming more standard, is to give employees access to some level of ongoing support during the life of the assignment or after the initial move. Minimally this can consist of providing information – perhaps on the company’s Intranet, in a text or an email reminder – on career planning, updating assignment objectives, repatriation preparation, or to capture new competencies and skills related to the experience that will become part of their annual performance review. Often a simple “how is it going?” could make a difference to the employee and solicit valuable feedback for the program.

8 **Big global mobility trends to watch in 2019**

Repatriation is another pivotal moment requiring support. Often linked to assignment ROI, it has been written about extensively at Crown and across the industry. When the repatriation experience only focuses on the logistical move and not the employee's career, onboarding or family's adjustment, or when repatriation lacks support for leveraging the employee's international experience, it may result in the employee exiting the company or an irreparable blow to morale and productivity.

The big takeaway is that no-one can afford to rely on "typical" or "standard" approaches to bringing in the human touch to the employee's experience. What one employee might deem stressful, confusing or necessary might be irrelevant to another due to their age, experiences or expectations. The key is to have information and support available and to offer it in a variety of forms.

A number of our trends this year reflect the increasing need for personalization and choice. Companies looking for creative ways to identify what an "employee-experience" focus can look like start with engaging current and past "customers." They may set up a simple way to get feedback (i.e., using a polling or feedback app) at the entry or exit of each pivotal moment during the assignment lifecycle. To gain more in-depth feedback they may use focus groups, voice of the customer surveys or interviews that can generate ideas around what support would be useful.





Technology to supplement, simplify and enhance

Technology solutions come in many shapes and sizes. Across our industry every company has some level of technology supporting its business model. No matter where you work, you find yourself a part of your organization's digital journey. Opting out is not possible.



Employees, especially early-career Millennials and emerging Gen Zs, continue to influence expectations. But employees across almost all generations have similar expectations when it comes to wanting the convenience and simplicity of having information at their fingertips – and available on any of their devices. Technology designed to help manage an employee's move continues to evolve. Even companies with fewer than 25 assignments per year will look to move away from paper processes for forms and policy.

What about chatbots?

CWM's 2018 research shows that companies adopting chatbots to support their mobility program communication remains a future aspiration. Only 3% of companies are using them. Some companies cite challenges such as; questions may be phrased differently and technology may vary from one region to another. This impedes some of the standardization required in chatbot technology.

There are a number of technology solutions that are clearly making a huge difference in enhancing the employee's experience and simplifying the process. Here are a few examples on the rise:

- Technology platforms to support the use of lump sums and cash allowances: the focus is on simplifying decision-making, choices and managing budgets. This is especially popular for Do It Yourself (DIY), early-career or low-cost move scenarios.
- Virtual options for home searches, destination tours, home surveys, policy counseling, language and cross-cultural training, coaching, interviews, etc.
- ePacking so that the employee's goods are scanned and tracked. Gone are the days of manually generating packing lists.
- Interactive, click-through policies designed to access relevant information easily. There is no longer a need to read through text-heavy PDF documents; simple infographics explain processes and policies.
- Use of social media to connect with other expats in new locations. This will be especially useful for non-traditional relocating employees or families who want alternative communities for support and social activities.
- Videos to explain global mobility processes at every step of the journey.

While technology-supported solutions will continue to emerge, improve and amaze us, and employees' demands will only increase, the person-to-person engagement familiar to the relocation process will continue to play a critical, albeit evolved, role. We believe that our industry will be at the forefront of balancing human technology interaction and human-to-human interaction to ensure that the highly emotionally charged experience of relocating is undertaken in the most successful way.



Global mobility in the advisor role

The evolution of the global mobility professional is a continual process. The increased use of flexible mobility policy, along with growing business and employee demands for choices, requires those in the function to advise and support decision-makers in new ways. Interestingly, this is a trend that reflects similar shifts across HR. According to SHRM, the Society of Human Resources Management, in 2019 “employees will depend on their employers for advice and help in understanding how to best leverage their specific needs.”

In a recent Crown World Mobility survey of more than 125 global mobility professionals, 56% of companies indicated they use flexible policies and another 10% are planning to use the approach in the next 12 months. Core-flex is the most popular flexible policy option available. Driven by the business manager or HR, the “flex” element can also be an instrument for employee choice. Flexibility offers companies a way to address differing business line, location and employee needs via a consistent platform. Yet this very benefit requires that someone take the role of advisor to the decision-makers, and that role is typically filled by global mobility.

Employees looking for choices in policy are finding it in the use of lump sum and flexible allowances; particularly popular in policies targeted to early-career employees, often moving for the first time. While these employees may need fewer services, they typically need more guidance. This paradox leads directly to the desks of global mobility professionals.

Flexibility and choice of any kind add complexity and require new skills and practices. This year we will see global mobility teams re-writing job descriptions, upskilling team members and hiring new talent with more consultative and strategic experience.





Flexibility and choices

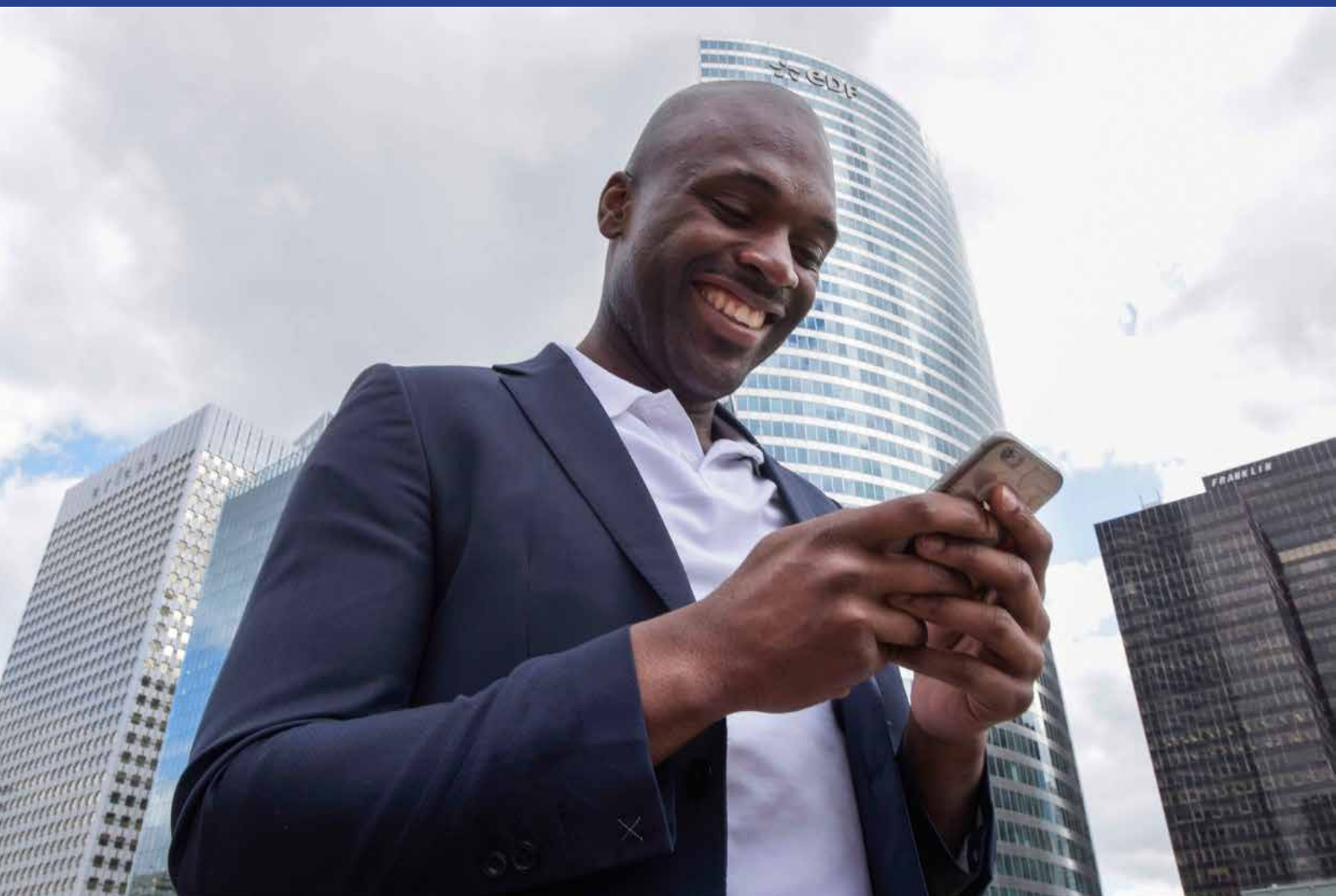
This topic continues to evolve in terms of what it means and is becoming a perennial trend. Today's consumers want choices, convenience and the opportunity to customize. This reality is making it into all types of corporate strategy, including global mobility. Business and HR partners want options to meet their needs, whether it is the budget, region or employee population.

Today's employees are accustomed to marketplace options:

- How we purchase (WePay, Venmo)
- Where we purchase (Amazon, online stores)
- New services (Uber, Airbnb)
- Choices for items we buy (gluten free, customized sneakers, and even choices for room color, art on the walls and pillow options when booking hotels)

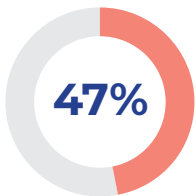
So why wouldn't they expect some choices in their company's global mobility program?

Similarly, corporate global mobility programs increasingly expect flexibility and choice from their external partners: concierge services, lump sum management, global or local billing, face-to-face (F2F) or virtual consultations.

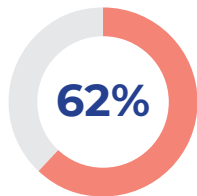


Flexibility and choice in global mobility is a big part of the “transformation” theme for 2019. Here are just a few ways they are increasingly common place:

- Flexible policies are on the rise. Based on CWM's 2018 survey:



of companies that offer Manager and HR flexible policy options have had them for two years or less



of companies that offer employee-choice options in policy have had them for two years or less

- Early-career employees are asking for DIY and cash options for some types of relocation support:



Travel bookings



Temporary housing

- Cross-cultural and language training programs are delivered in a variety of ways from high touch, to no touch or something in-between:



F2F



Blended learning models

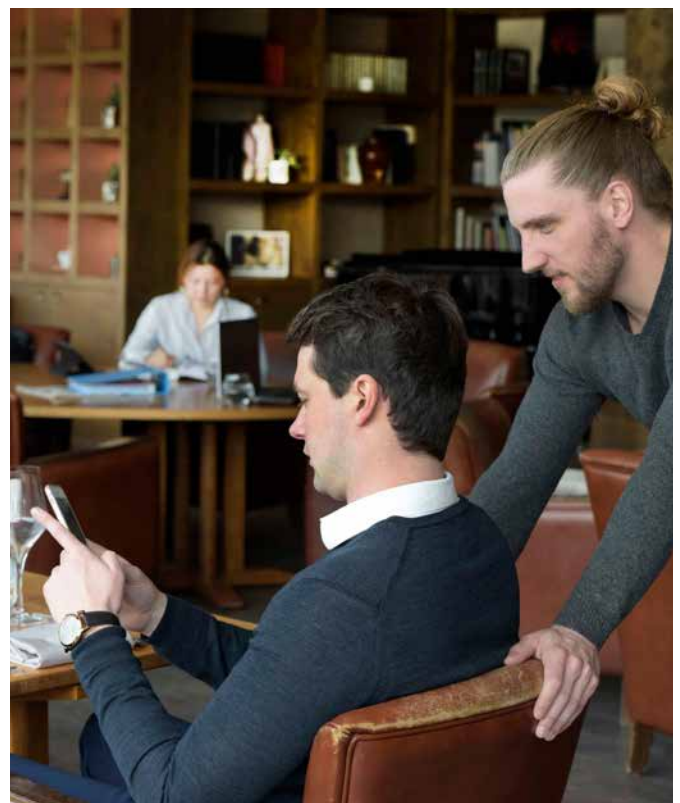


Virtual



Self-managed

- Business units and regions want flexible options for how different types of assignments and employees are supported.
- Housing options for mobile employees now come in different sizes, budgets and styles in order to meet the different lifestyles and priorities of a wide range of employees – from traditional expat housing to the latest urban trend of “co-living” where tenants lease small rooms and share common spaces with strangers. Some companies are even telling employees that if they use less than the housing allowance, they can split the difference with the company as a way to encourage alternative thinking.
- Employees want the flexibility to work in an office, from home or in a coffee shop. The latest workplace designs for companies immersed in the war for talent develop ultra-high tech, high-design spaces that often give employees a wide range of work environments to choose from.
- Shipping and furniture options for temporary assignments and transfers include offering the choice of the legacy approach (20 and 40 ft shipping containers), furnished housing or a furniture allowance.



Dual-career couples

Dual-career couples are not a new phenomenon in global mobility, nor is this the first time we have presented it in our annual trends. So why is it reappearing in 2019? Because more companies are struggling with the challenges that the dual couple demographic brings and are in search of creative solutions.

There are two ways that we see companies defining the dual-career couple. Most frequently the term applies to an employee whose spouse or partner has a career in another organization and perhaps a different field. For some companies the employee population includes a number of employees who are married, and therefore, “dual career” may also mean an employee whose spouse or partner is working in the same organization.



This topic has continued to increase in importance because it is far more common for both partners to contribute significantly to a family income. This means that when an employee is asked to go on an international assignment or transfer locations, the economic and family impact of the decision is greater than in the past.

Another challenge for the dual-career family stems from changing immigration regulations and partner work authorization regulations.

Currently, the EU and the U.K. still have a free movement of people arrangement that is central to the Brexit negotiations. Around the globe there are only 30 countries that allow accompanying partners to work. In some countries, like the U.S., this is only for married partners. But in many cases, like the U.K. and Denmark, this is available for employees' partners and not limited to couples with married status. In 2018 Hong Kong passed a landmark ruling allowing dependent visa status for same-sex partners, giving LGBT spouses/partners the opportunity for employment. This shows progress, but it continues to not be the norm in most countries.

We are seeing dual-career challenges to mobility in all industries and regions. The dual-career factor is a significant barrier to getting the right people to accept an assignment or a move. So how are companies dealing with this?

- **Split-families are on the rise** – this approach, which emerged in Asia before it became more frequently used in Europe and other regions, means that the employee accepts an assignment or permanent position in a new location but goes unaccompanied – leaving the partner and family in the home location. Many companies now have policies to support the split-family approach, offering more frequent home leave, reverse home leave and other options. In many companies, eligibility for the split-leave status is limited to 12-24 months, due to the instability to the family and the high potential for employee burnout. Productivity on the job is also likely to be impacted in the long term.

- **Commuter assignments have risen** for some companies as a result of the high number of employees in dual-career relationships. We see this especially true across the EU, where there are fewer regulations and distances are shorter. The commuter solution has similarities with the split-family approach described above. However, the commuter status is normally limited to trips of four hours or less, and the company incurs the cost of weekly or frequent returns home. While there are successful examples of positions being filled, one challenge is that the roles are not usually intended as temporary. After a period of time companies may find that the commuter status impacts the employee and their family, as well as the morale of the team in the home and host location.
- **The dual-career trend is also increasingly relevant** due to its connection with diversity mobility. For companies focused on increasing female employees and those with same-sex partners, the dual career dilemma is almost always part of the discussion – whether it is standing in the way of the employee accepting the assignment, requiring the company to offer alternative assignment types or creative solutions to make the assignment work.
- **Partner support will continue to become more central to the global mobility program.** Today more than half of policies, 56% according to our 2019 Policy and Practices report, address spouse/partner assistance. While most policies do not limit assistance to spouse/partners who are employed at the time of the assignment (24%) or reference spouse/partner employment at all (40%), 36% of policies apply assistance to spouses/partners employed at the time of the assignment. The most standard support comes in the form of reimbursements for job search assistance, professional affiliations and credential maintenance.

This is a trend that reflects a shift in relevance and is a topic gaining urgency. In the past it was discussed because it was impacting a small number of accompanied employees and needed to be addressed as a new challenge. Today it impacts almost every employee eligible for accompanied status. Many years ago we wrote that the growth of dual-career couples would force companies and our industry to find creative solutions – this may be a breakout year for more and innovative solutions to emerge.

Employee well-being and duty of care

This is the second year in a row that this topic appears on our trends to watch list. The reasons that employee well-being and duty of care appear again stem from two notable shifts in workforce dynamics. First, today's employees increasingly expect to work in an environment that enables them to establish a work-life balance. The concept of "work-life balance" is no longer limited to benefits, like flexible hours and maternity leave.





It has broadened to incorporate mental and physical well-being and having benefits that support a wide range of priorities, such as:

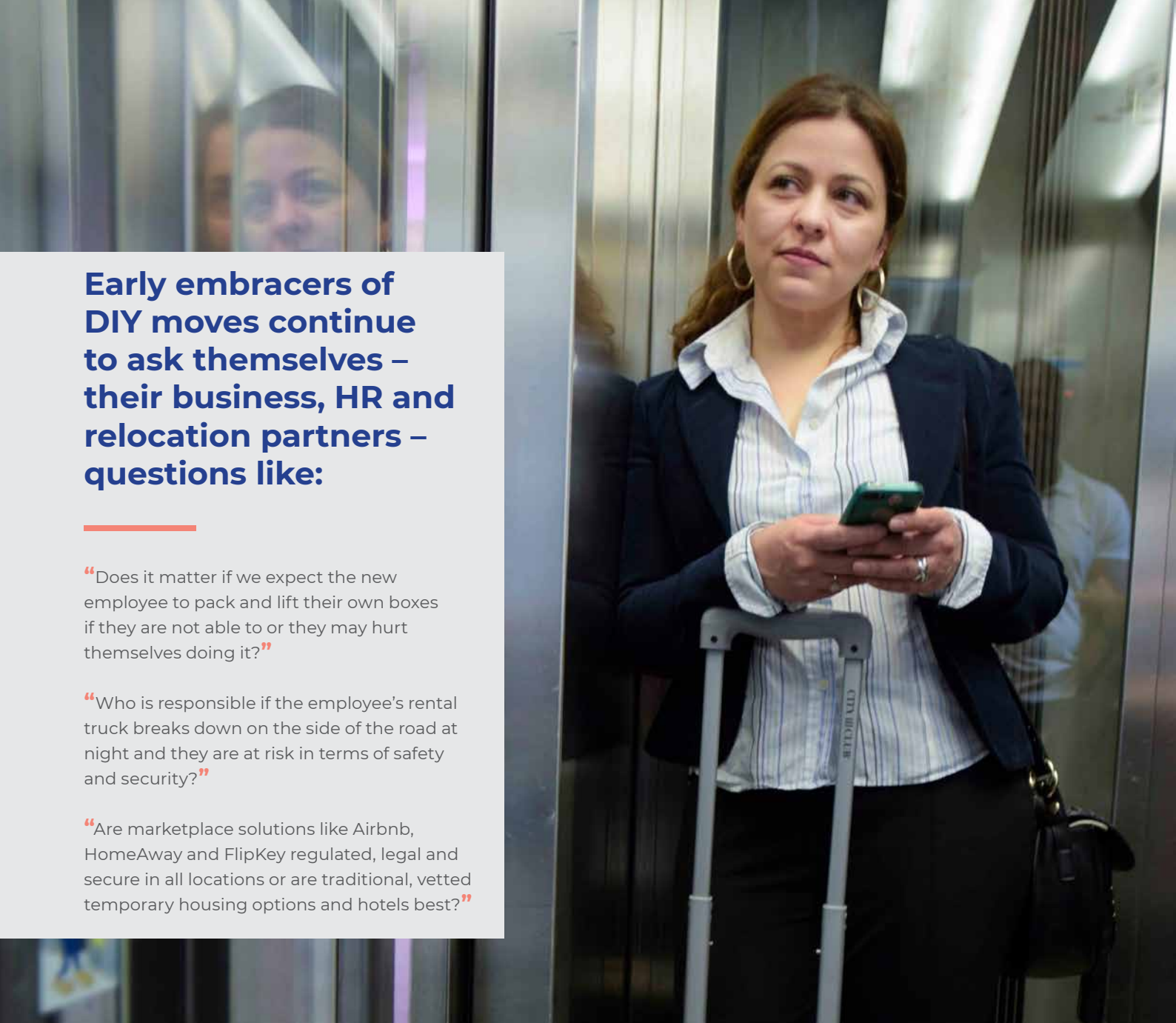
- Access to healthy food options
- Encouragement of physical activity
- Corporate social responsibility and community outreach activities
- Mindfulness
- Updated technology and availability of devices
- Flexible healthcare
- Personal development opportunities
- Green and updated workplace environments

Today, companies focused on recruiting and retaining high-performing talent prioritize employee well-being.

Building on the trend that we began to highlight in 2018, corporate relocating employee “well-being strategies” should be aligned with this overall workplace shift. The good news is that many mobility programs and policies already address well-being issues, but so far, they are not being communicated across our industry. 2019 would be a good year to rebrand some of the benefits that support employee and family well-being and come up with new options to promote and provide.

Examples of mobility benefits that support employee well-being strategies:

- Pre-departure medical examinations to anticipate or address health issues prior to the move.
- Pre-decision counselling related to the financial impact of the potential move.
- Cross-cultural training programs that address the stresses of change, culture shock, coping strategies for adapting to new environments, family adjustment planning in addition to learning about cultural self-awareness and the destination location’s history, behavior, norms and values.
- Language training to ensure basic communication skills in the new location.
- Home finding support (to align with policy but may include F2F, virtual, lists of websites, etc.)
- Settling-in services to get up and running in the new location, connecting to local community activities, setting up apps, learning about local norms (from neighborly behaviors to recycling expectations) and determining commuting options, etc.
- International SOS or other emergency support availability.
- Onboarding support to welcome employees and learn about the new work environment.
- Buddy systems, coaching or mentoring employees on assignments or in new roles.
- Security briefings from global and/or local corporate security.
- Support from third-party service partners and technology platforms to give advice at each stage of the mobility experience.
- Global mobility Intranet sites with information, checklists, tips and other resources available.



Early embracers of DIY moves continue to ask themselves – their business, HR and relocation partners – questions like:

“Does it matter if we expect the new employee to pack and lift their own boxes if they are not able to or they may hurt themselves doing it?”

“Who is responsible if the employee's rental truck breaks down on the side of the road at night and they are at risk in terms of safety and security?”

“Are marketplace solutions like Airbnb, HomeAway and FlipKey regulated, legal and secure in all locations or are traditional, vetted temporary housing options and hotels best?”

The second aspect of the trend is duty of care. In 2016 we started talking about “Uber” mobility and the reality that DIY mobility options were entering, and even positively disrupting, the traditional ways to provide services to relocating employees. Here we are three years later, and we are certainly living this rapidly normalized approach. More companies are moving towards flexible DIY, lump sum and cash options for early-career and low-cost move segments. In our 2018 Global Mobility Survey, the top concerns for these DIY approaches were around the potential for a negative employee experience and duty of care.

Some of these online marketplace services, like Airbnb, have come a long way in addressing many of these concerns. Some organizations, especially those with high numbers of Millennial employees, feel they have no option but to move ahead with unrestricted employee-driven services despite the risks.

DIY is expected and, as one Head of Global Mobility recently said, “our employees are going to do it anyway, so we might as well be okay with it.” Yet even if employees want something, the company ultimately owns the responsibility for offering it and this can give some HR leaders pause to consider the best way to proceed.

We are still at a point in the evolution of DIY move options where global mobility and business travel policy need to be updated to reflect corporate policy, employer/employee responsibilities, etc. It is also the time to increase, re-write or establish more guidelines, education and communication strategies to advise and support stakeholders on these maturing and increasing alternatives.

D&I Mobility: Making global careers more accessible

This is our fifth year of tracking and supporting the industry's discussion around diversity mobility, and each year we highlight new ways companies are embracing the reality that corporate D&I strategies need to be reflected in talent mobility programs.

Global companies require international experience as part of future leader development and therefore it becomes increasingly clear that when the mobile population of a company does not have diversity, the company's future leaders will be limited to those with access to international opportunities. Inclusion and reducing barriers to global mobility are central to this concept. Fortunately, as some of our 2019 trends demonstrate, flexible policies and focusing on the employee experience and well-being represent strategies that will enhance diversity.





This year we see companies assessing the gaps and taking steps to become more inclusive. Increasing the number of females on assignment, supporting LGBT employees, dual-career couples, creating low-cost and agile opportunities for Millennials and employees from business-critical emerging markets, and adding flexibility to policy to support non-traditional family dynamics are all becoming commonplace. Creating international work opportunities for employees with disabilities is the latest area being addressed in some leading-edge organizations.

Tips for an inclusive diversity mobility program, and adding disabled employees to the relocating employee population, based on the practices of cutting-edge companies include:

- Create an awareness-raising strategy this year for your organization around diversity mobility.
- Add Unconscious Bias training for selection managers and your global mobility team. Explain why this is critical for increasing international opportunities for all employees.
- Measure the diversity of your mobile population against the diversity data for the general employee population every year; this allows you to measure progress but also helps you to set realistic goals.
- Create global mobility tips and information for disabled employees that are aligned with existing materials for female, LGBT, dual-career employees, etc.
- Ask your relocation management partners if they offer services to support moving employees or families with disabilities. Companies require their service partners to meet all kinds of needs such as VIP services, pet relocation, integration with other partners, to billing in certain ways – why not add this to the list?
- Become informed about accessibility and healthcare issues in the new location and become an advocate for your disabled employees.
- Remember that not all disabilities are visible and, similar to members of the LGBT community, not all employees may want to share their personal information. Make sure the company's and global mobility teams' support for disabled employees is visible and available on your Intranet site and included in your communication strategy.
- Use this as an opportunity to gain input from current employees – a focus group or survey could be a great source for creative ideas for this initiative. One of the many strengths of people with disabilities is that they are almost always great problem-solvers!



Conclusion

We began our discussion with the concept that 2019 is going to be a year of transformation – whether we are talking about the world at large, global business or global mobility. CWM’s annual trend watch is designed to shed light on some of the transformations occurring in our industry and to share examples of ways Crown and other organizations are addressing new and evolving ways of working.

We also hope that the list inspires new ways of thinking and provides practices that will take your program and our industry forward in innovative ways.

Albert Einstein’s quote started us off, and we end with the words of John F. Kennedy:

“Change is the law of life and those who look only to the past or present are certain to miss the future.”

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