2026 KPMG Global Mobility Benchmarking Report

How strategic leaders are redefining mobility today



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Foreword

Against a volatile geopolitical and regulatory backdrop, it may come as a surprise that global mobility leaders remain optimistic about their function's strategic influence. This year's 2026 KPMG Global Mobility Benchmarking Survey gathered input from 625 mobility professionals, the highest response in the survey's history, and many expect their programs to become more strategic over the next 12 to 18 months.

Given the frequency of major geopolitical events in recent years, alongside a broader retreat from globalization toward more nationally focused policies, you might expect organizations to pull back on international mobility altogether. Instead, we see strong ambition to deliver greater strategic value to the business. That, in itself, is a story worth telling.

Across this report, we see an increased focus on foundational excellence through more efficient, tech-driven delivery models and stronger compliance. This is necessary and welcomed work, but in my experience, it's rarely what mobility itself should define as its "strategy."

The organizations that go further are the ones that use this foundation to build something more, demonstrating real relevance to the business's own objectives, and measuring their impact on talent, employee and business outcomes, not cost alone.

Technology and automation are a key part of this story, and rightly so, but they're not a guarantee of success. Their value depends entirely on data integrity and skilled teams that can use them well. Meanwhile, immigration, business travel and payroll compliance continue to demand rigor as the geopolitical backdrop grows more complex. Getting this right, and doing so with greater risk awareness, remains the foundation on which everything else in this report is built.

What ultimately separates the organizations making progress is their ability to communicate in the language of the business, and to show, credibly, how mobility contributes to achieving the organization's goals. This skill, more than any single policy or platform, determines whether ambition translates into real influence.

My thanks go to the 625 mobility professionals who gave their time to this year's survey, and to the KPMG practitioners who shared their insights and experiences to help shape this report.



Andrew Vincett
Head of Global Mobility Services
KPMG International

Andrew Vincett is the Head of Global Mobility Services for KPMG International and a Partner in KPMG Switzerland. With his extensive experience, Andrew has led global teams supporting some of the world's largest and most complex mobility programs and works with multinational organizations to tackle the compliance and strategic challenges of managing internationally mobile workforces.

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Executive summary

Global mobility teams continue to want to deliver more strategic value, and this year's benchmarking survey shows momentum behind that ambition.

On average, organizations surveyed expect their mobility strategic maturity to rise from 6.2 out of 10 today to 6.9 within the next 12 to 18 months, with 43 percent expecting to reach a "highly strategic" rating of 8 to 10 within that window. This optimism holds broadly true across the survey sample. Each region anticipated improvement, led by Asia Pacific's (APAC) expected gain of 0.86 points, ahead of a still positive outlook from the Americas and respondents from Europe, the Middle East and Africa (EMEA). The pattern across organization size tells a similar story. Rather than the largest organizations extending their lead, the smallest organizations expect the greatest improvement over the period ahead, suggesting an appetite to close the gap on more mature peers.

> "In the face of significant and multiple geopolitical crises, we still see optimism in the mobility industry, and from clients that send their employees around the world."

Andrew Vincett
Head of Global Mobility Services
KPMG International

Optimism, however, isn't the same as assurance. With that in mind, last year's cohort predicted a similarly steep climb, from 6.0 to a projected 7.1, and this year's comparable scores suggest that ambition wasn't fully realized. Confidence is also uneven among this year's respondents. Behind the average sits a widening spread of experience. While some organizations are steering a clear course toward greater strategic influence, others report far more modest expectations, and a minority anticipate their program's standing remaining flat, or even declining, over the same period.

The question this report sets out to answer isn't whether global mobility teams want to become more strategic, but who's best positioned to get there, and what separates their approach from those who aren't.

The increasingly complex business landscape, and why this creates both a challenge and an opportunity for mobility.

Behind this ambition sits an operating environment that has grown more complex. The traditional boundaries of an international assignment have blurred as the scope of mobility continues to expand, encompassing a broader workforce mix: contingent workers, gig workers, digital labor, cross-border agents, as well as a blend of physical, remote and hybrid working arrangements.

Drawing on this benchmark survey and our wider research, we see four converging forces placing pressure on mobility programs simultaneously.

Geopolitical and regulatory complexity continues to intensify. Shifting immigration policy, sanctions regimes and closer enforcement of frameworks, such as the European Union's Posted Workers Directive, are adding new layers of tax, social security and compliance obligations across jurisdictions, raising both the cost and the risk of moving people without the right expertise in place.

Economic pressure and cost discipline mean mobility teams are increasingly being asked to do more with less, absorbing rising demand and growing compliance obligations against a backdrop of tighter budgets, leaner teams and closer scrutiny of supplier spend.

AI and the changing nature of work are reshaping which tasks mobility teams still need to perform themselves. As automation takes on more of the operational and administrative workload, teams face the parallel challenge of proving the value of the capacity this frees up, rather than being defined purely by how efficiently they execute.

Talent scarcity and shifting workforce expectations add a further layer of difficulty. Competition is intensifying for specialist skills in tax, immigration and mobility itself, while employees increasingly expect flexibility, career development and real support before agreeing to move at all.

Together, these forces make moving people costlier and riskier when they're not backed by the right expertise, adding pressure to a function already stretched across compliance, cost and, increasingly, talent.

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Yet, as noted by Alison Shipitofsky, Director and Head of Strategic Relations at KPMG International, this same complexity also appears to be creating a distinct opening for mobility: "Even with geopolitics, AI, budget cuts and everything going on that's impacting mobility, what's apparent is that people still need to move. People still need to travel. That cross-border movement remains important."

The underlying demand for cross-border talent deployment isn't going away, and it appears the accumulation of tax, immigration and social security risk across an expanding range of mobility arrangements makes specialist oversight more valuable, giving mobility a stronger case for a seat at the table where decisions about talent, growth and risk are made.

So, how are mobility functions expecting to make that shift?

This aspiration is not new. Across human resource (HR) and workforce functions, the drive to align more closely with core business values, faster delivery, greater innovation, and lower risk has been building for years, and mobility's push toward strategic relevance sits firmly within that wider shift. What's different is the pressure now on mobility specifically to demonstrate it.

The evidence in this report suggests there's no single path, and no organization arrives at strategic maturity in the same way or at the same pace. What's consistent is the common priorities of mobility teams. Efficiency, technology and compliance are seemingly the new foundations of strategic mobility. However, they're not the destination. Organizations pulling ahead are the ones converting the time and credibility those foundations create into a truly consultative, business-critical role.

Strategic mobility develops in stages, and different programs sit at different points along that path:

Operationally controlled

Focus on managing compliance, risk, process delivery and cost, the essential discipline on which every mobility program is built.

Business-connected

Mobility decisions are actively aligned with wider organizational priorities, and the function is engaged as a genuine stakeholder rather than a downstream executor.

Data-enabled

Reporting, systems and automation mature to the point where the team has visibility into its population, performance and risk exposure.

Strategically influential

Mobility is trusted to advise on talent deployment, employee experience and broader business outcomes, shaping decisions rather than simply delivering them.

These stages are not mutually exclusive, and progress rarely runs in a straight line. Strategic mobility combines continued operational discipline with wider business relevance: managing risk effectively, using data and technology to sharpen decision-making, and applying specialist expertise to the organization's priorities around talent, growth, employee experience and retention.

Building on this maturity curve, this report examines five connected themes that shape how global mobility can strengthen its strategic contribution, recognizing that organizations are progressing at different rates and continue to face real practical constraints. In doing so, we explore what becoming more strategic means.

1. Defining strategic mobility
2. Scaling technological efficiency
3. Managing volatile compliance
4. Partnering with the business
5. Developing the next generation

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Key findings

Mobility's strategic ambition is evident

47% don't have, or aren't aware of, a defined global mobility strategy.

43% expect to be "highly strategic" within 12–18 months, with **only 26 percent** reporting they're currently in that bracket.

The average strategic rating is expected to rise from

6.2 to **6.9** in 12–18 months **(+0.7).**

Communicating mobility's value is a weak spot

Business communication of mobility's value is rated only

2.6 out of 5,

with only **13 percent** rating it 4 or 5.

Only 17%

say their mobility strategy is widely communicated and understood by stakeholders, rising to **18 percent** among the most strategic.

Compliance and efficiency rise to the top of mobility's agenda

#1 challenge is ensuring broader compliance (30 percent), up 4 percent from 2025, followed by demonstrating return on investment (29 percent) and partnering effectively with the business (26 percent).

#1 objective for mobility over the next 12-18 months is increased efficiency and speed, up 11 percent to 29 percent from 2025, followed by reviewing and optimizing the delivery model (27 percent) and developing team skills (26 percent).

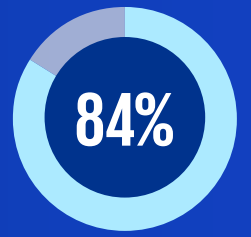
Skills gaps limit mobility's strategic impact

Attracting and retaining mobility team members has risen as a challenge and is 9 percentage points higher among more strategic respondents (26 percent vs 17 percent).

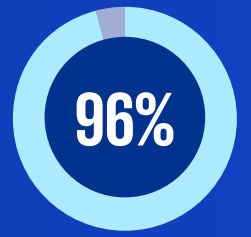
Top capability gaps are technology fluency (32.4 percent) and business partnering/consulting skills (31.9 percent).

57% of mobility's time is still spent on operational tasks, including data analytics and reporting, and managing payroll, immigration and cost estimates.

Investment in technology and AI is accelerating



now plan to invest in technology, up from 62 percent; while those not planning to invest fell from 19 percent to 7 percent.



of the most strategic teams plan to invest in technology, compared with 57 percent of the least strategic, showing a clear gap in intentions.

Over 95%

are using or planning to use AI within a year, yet only about 1/3 use it regularly, not ad hoc.

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Defining strategic mobility

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This year's research highlights mobility's ambition to create more strategic value, yet there's no consensus on what this means in practice.

When asked directly about what "strategic global mobility" means to their organization, respondents converged on a mixed set of ideas.

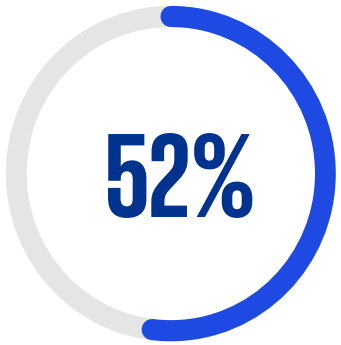
Proactively supporting the quick and efficient movement of people was the most chosen top three definition, selected by 52 percent. This was followed by aligning more closely with talent development programs (47 percent) and providing proactive advice to support compliance (45 percent).

Both the most and least strategic organizations lean strongly into this efficiency-based definition, with 54 percent and 49 percent selecting it, respectively. The least strategic, however, also gravitates toward their ability to support compliance matters proactively (51 percent).

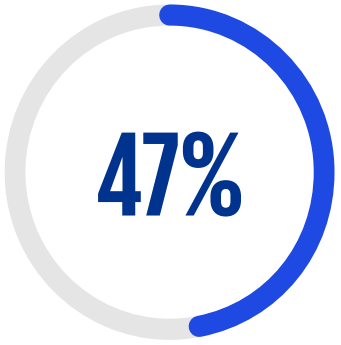
Both responses are legitimate expressions of value, particularly where mobility sits close to business continuity or cost control. Yet, they also risk reinforcing mobility's identity as a process-led function rather than a strategic partner to the business.

How organizations define strategic global mobility today

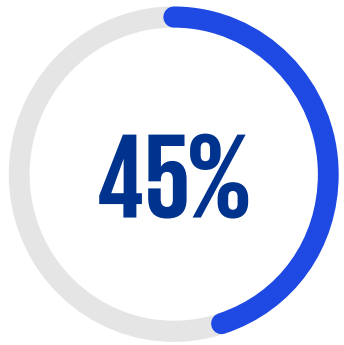
(Respondents ranked top three choices)



#1 Providing proactive advice to the business to increase the speed of moving employees



#2 Aligning more closely with talent development programs



#3 Providing proactive advice to the business to support compliance

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Other definitions, such as supporting cost savings, having the right policies, and improving employee experience, were selected less often, but overall, remain relevant in a good proportion of programs.

Part of the difficulty in defining what "strategic mobility" looks like is that mobility rarely defines its own strategy in isolation. It's typically hard to separate mobility's agenda from the wider business's, and unclear whether the two should be treated as the same thing or as distinct priorities.

This ambiguity, more than a lack of ambition, may explain why just under half of organizations (47 percent) report either lacking a defined mobility strategy or not being sure whether they have one at all.

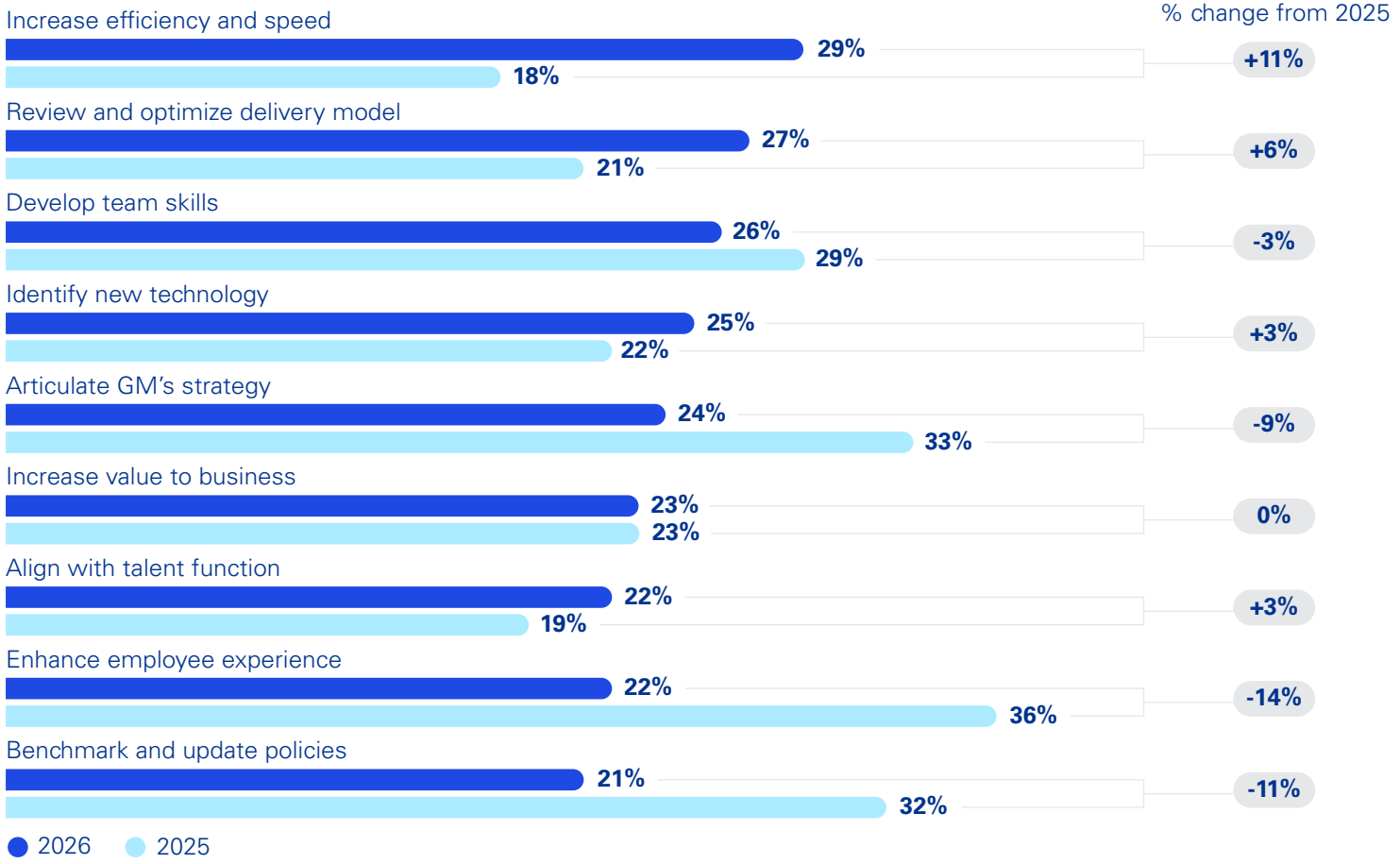
An efficiency-based strategic focus plays out in what mobility teams are setting as near-term priorities for their programs.

Increasing program efficiency and reviewing how the service delivery model can be optimized were the top two priorities for the next 12 to 18 months, selected by 29 percent and 27 percent of respondents as top-three objectives for their program.

Both are up sharply from 2025, by 11 and 6 percentage points, respectively. While other once-prominent objectives, such as enhancing the employee experience and updating mobility policies, have fallen back in focus, down 14 and 11 percentage points.

Top goals for global mobility beyond compliance over the next 12–18 months

(Respondents ranked top three choices)



Note: Other categories provided in the survey, though not ranked within the top nine, included: RFP — compliance services, RFP — non-compliance services, Reduce program cost, Measure ROI, and Embed greater flexibility.

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While this may represent a shift back to what experts call more "traditional mobility," this narrow focus can limit mobility's strategic potential.

As geopolitical, regulatory and socioeconomic complexity heightens business risk, moving employees has become increasingly difficult. With business travel, payroll and tax considerations all growing, organizations are prioritizing a function that can ensure compliance, safely and efficiently.

The question is whether this is what strategic mobility means in 2026, and if the push to become more strategic should be centered here alone.

For some organizations, particularly those where speed of movement or cost discipline is directly tied to business performance, these more operational definitions may be right.

For most, however, developing a more efficient and compliant program matters because it lets mobility align more closely with the business and create wider strategic value.

Greater program efficiency and optimization remain shared priorities at both ends of the maturity spectrum. What separates the most strategic organizations is what they prioritize alongside these fundamentals.

As Benjamin Starkey, Partner at KPMG Japan, explained, getting the operational fundamentals right is not incidental to becoming strategic but an essential precondition in "getting to that next step of real strategic change."

Beyond building a more efficient and optimized delivery model, the most strategic organizations also show greater ambition to develop their team skills (28 percent, up 11 percentage points from the least strategic) and align more closely with the talent function (24 percent, up 7 percentage points).

These organizations aren't neglecting core fundamentals of efficiency and compliance; they're treating them as the bedrock for building capability and closer business alignment. Those that don't, and instead treat productivity as the end goal, risk becoming "stuck," as Laura Tippett, Global Mobility Services Partner at KPMG Canada, explained: "Some mobility programs are stuck trying to figure out how to be efficient, focused mainly on speed and cost. Until these foundations are in place, it can be difficult to evolve the mobility function into a more strategic partner to the business."

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A clear, shared definition of "strategic mobility" is the starting point

The research shows strong ambition but limited agreement on what "strategic mobility" actually means. Many programs still define "strategic" mainly in terms of speed, efficiency and compliance. These are essential foundations, but on their own they tend to reinforce mobility as a process-led function rather than a genuine partner to the business.

For most organizations, the real opportunity is to treat efficiency and compliance as the base, not the end goal. Once core operations are under control, mobility can lean more into talent, workforce and business priorities, for example, supporting faster market entry, developing future leaders or managing emerging risks.

Getting there requires a clearer, shared vision. That means bringing the right stakeholders together, agreeing what the organization needs most from mobility and translating this into a practical "North Star" that guides decisions, investments and how success is measured.

Key actions for mobility leaders

- Bring stakeholders across HR, talent, finance and the business together to build a shared, coherent vision for the program.
- Consider structured workshops to stress-test assumptions and agree what "strategic" means for your organization.
- Look outward. Draw on external perspectives and market benchmarks to sharpen your North Star and roadmap.

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Scaling technological efficiency

02

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While no universal definition of strategic mobility exists, organizations across the spectrum are trying to act faster and with less manual effort.

This is a key part of the operational excellence that highly strategic programs are built on. However, our research suggests that most organizations remain somewhat frustrated with their current service delivery model. The average self-rated effectiveness score was just 6.2 out of 10, with just under half of respondents (47 percent) rating their model at 6 or below.

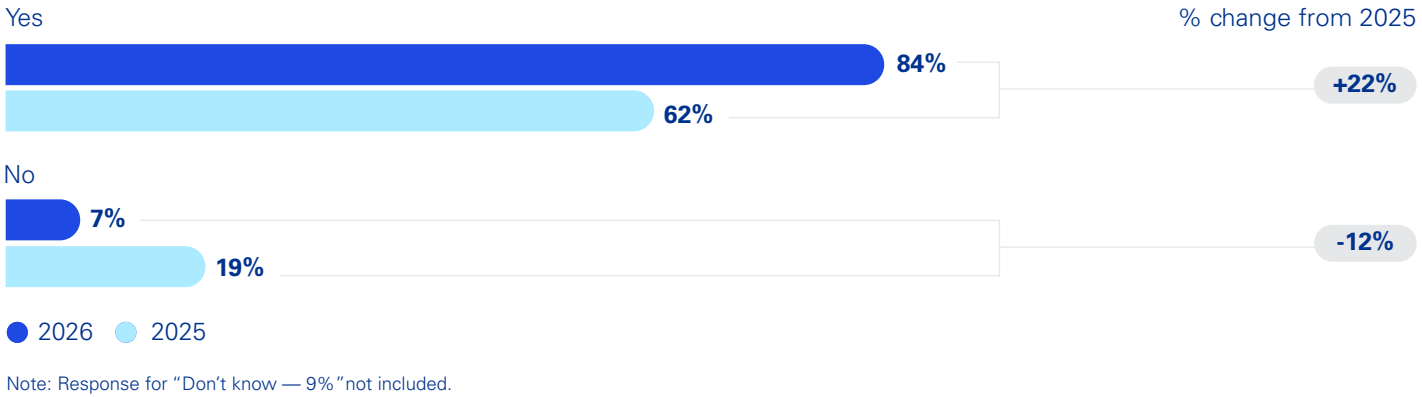
Mobility leaders were slightly more positive about their organization's current tools (averaging 7.3 out of 10, with 73 percent rating their current technology landscape as a 7 or above), and these ratings were highly correlated,[1] suggesting an association between stronger technology and a more effective delivery model.

Mobility recognizes these technology gains, as ambition rests strongly on the investments they expect to make in this space.

The proportion of mobility leaders planning to make technology investments within their program jumped from 62 percent in 2025 to 84 percent this year, while the share of organizations not planning to invest at all fell from 19 percent to just 7 percent.

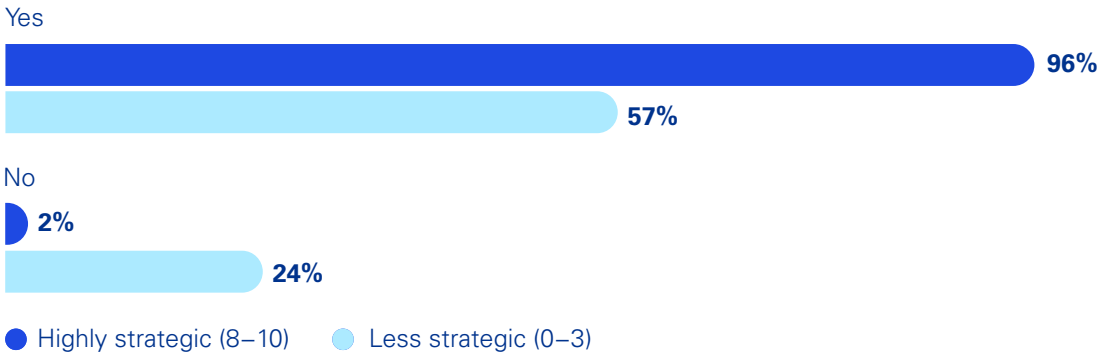
That intent is not evenly spread, however 96 percent of the most strategic teams plan to invest, compared with 57 percent of the least strategic — still a majority, but a meaningfully smaller one.

Technology investment is now a clear priority for mobility over the next 12–18 months



Note: Response for "Don't know — 9%"not included.

Prioritization of technology investment is even higher for the most strategic mobility teams



Note: Response for "Don't know — 2% (Highly strategic), 19% (Less strategic)" not included.

[1] A Pearson correlation coefficient (r) of .70 indicates a strong positive linear relationship between the two variables, suggesting that as one variable increases, the other tends to increase predictably.

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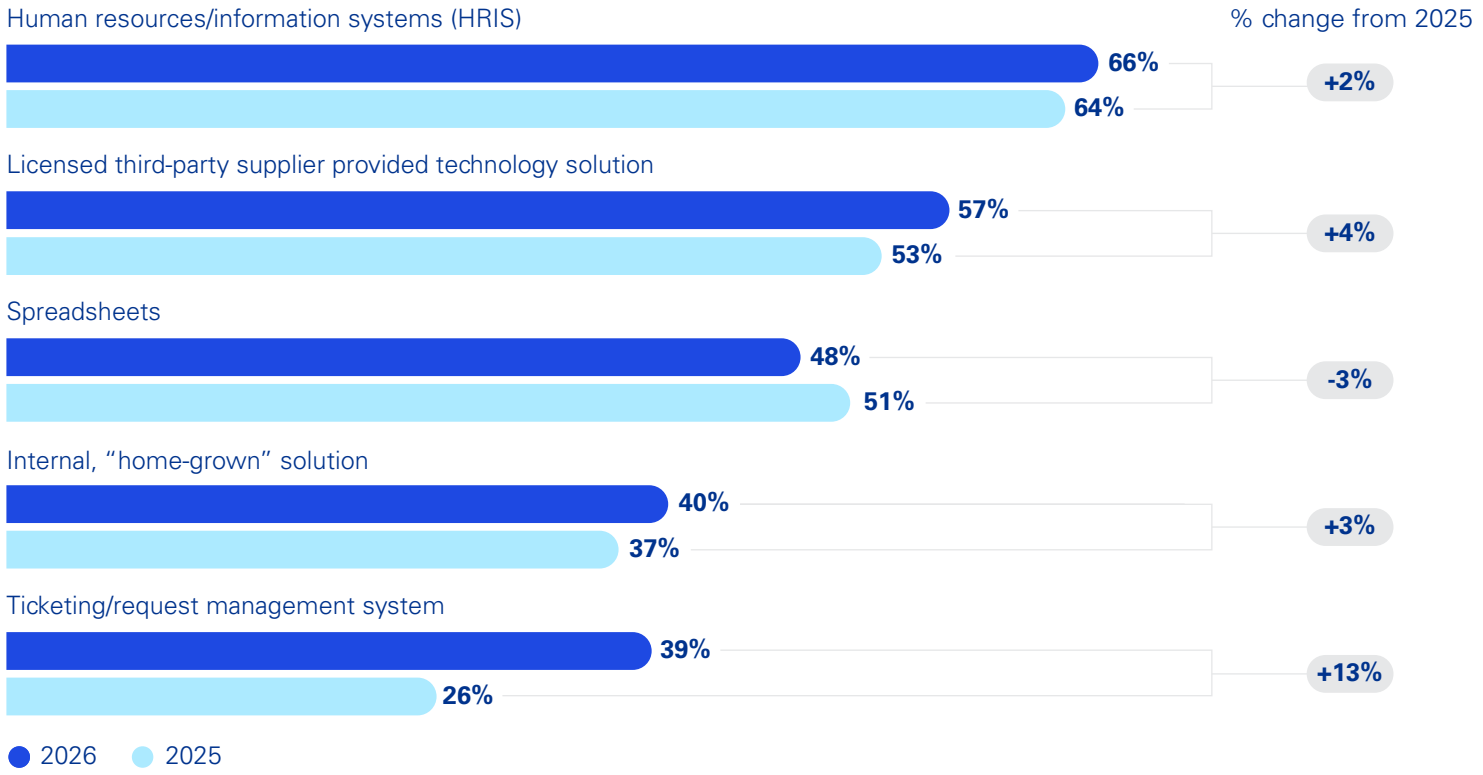
When exploring the tools mobility teams use to run their day-to-day programs, usage grew broadly across most tool types in 2026. Human resources information systems (HRIS), the most used tool, rose from 64 percent to 66 percent. Third-party supplier technology (53 to 57 percent), home-grown solutions (37 to 40 percent), and ticketing and case management technology (26 to 39 percent) also rose, and now commonly make up part of a mixed technology landscape for mobility teams.

Tools organizations use to run their global mobility programs (Respondents selected all that apply)



Note: Responses for "No current technology solution — 1%," "Don't know — 1%" and "Other — <1%" were not included.

There is also strong agreement on the intent to embrace AI within programs.

Across most organizations, mobility leaders expect AI to become a near universal facilitator of their program, with 95 percent or more either using AI already or expecting to within the next year, rising to 99 percent among the most strategic and 88 percent among the least.

As Andrew Vincett puts it, this urgency is already being felt on the ground: "If it's not a must, then it's close to a must. The bigger programs, with more people, more volume and more admin, will very quickly risk falling behind if they're not embracing AI."

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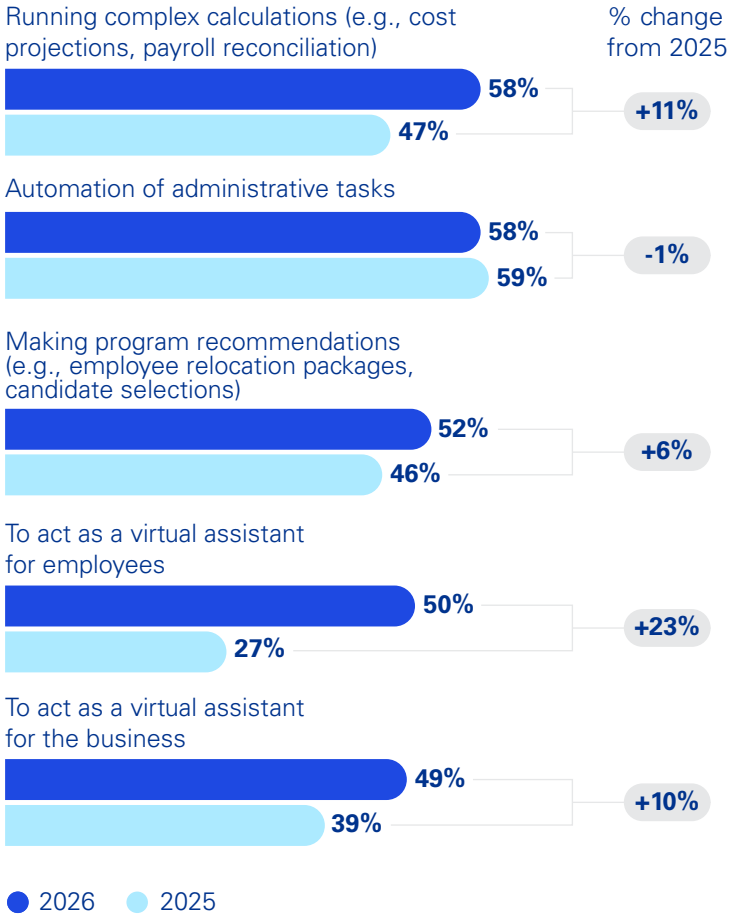
The benefits of AI are obvious, but to unlock its true strategic potential, organizations must move beyond ad hoc, task-based usage.

While 86 percent report using AI within their organization, around half (51 percent) say they use it only on an ad hoc basis, with roughly a third (36 percent) using it regularly as part of operational processes, rising to 57 percent among the most strategic teams.

AI use also diverges by organization maturity.

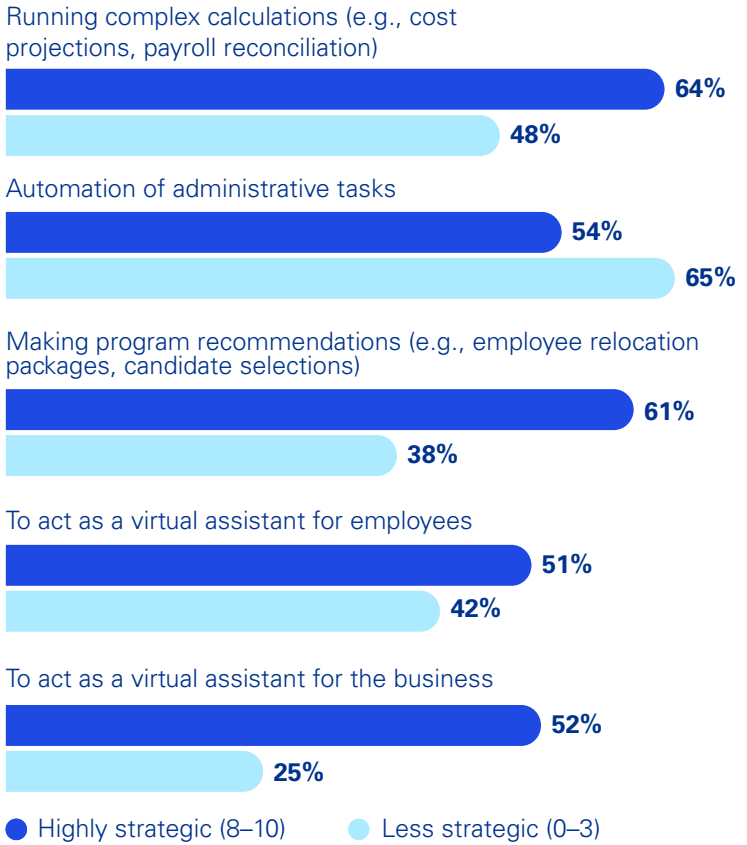
The most strategic teams are moving beyond using AI to automate admin-heavy processes. They're increasingly turning to it for complex problem-solving, such as cost projections and payroll reconciliation, and to help shape program recommendations, reported by 64 percent and 61 percent respectively, compared with just 48 percent and 38 percent of the least strategic.

Where global mobility teams are using AI
(Respondents selected all that apply)



Note: Response for "Don't know — 1%" not included.

How the most strategic teams are using AI
(Respondents selected all that apply)



Note: Response for "Don't know — 0% (Highly strategic), 7% (Less strategic)" not included.

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As Laura Tippett explained, AI can be transformational, but to use it strategically, mobility must look beyond simple cost or time savings to its broader impact. This is not simply a case of spending more on technology across the board: "It's a reallocation of their investment. The most strategic firms are prioritizing AI or technology that can help them across multiple aspects, not just separate individual processes or tasks."

Thomas Efkemann, Global Mobility Consulting & Managed Services Lead and Partner, Global Mobility Services, KPMG Germany, further summarized how automation should not be the end of the journey, but simply a starting point for mobility to build broader strategic influence: "If you have achieved 80 or 90 percent of automation, are you done? Or does the real question remain what comes next? What strategic value can you then add?"

The challenge organizations face is creating a landscape where tools work together to provide program-wide oversight, rather than siloed pockets of efficiency.

Investment is expected, but technological maturity isn't fully there yet.

Just under a third of organizations (28 percent) still describe their technology landscape as mostly manual, and spreadsheets remain in use by close to half of respondents (48 percent), only marginally down from 2025 (by 3 percent).

This holds across maturity levels too, with the most strategic teams showing spreadsheet use levels similar to the least. This is a reminder that legacy tools rarely disappear on their own, even where investment and ambition are both rising.

The priority, then, isn't more technology for its own sake, but a connected technological environment that can evolve with the mobility program.

Organizations should assess where fragmentation and legacy systems are limiting that ambition today and define a roadmap that moves them from task-level automation toward a more integrated, AI-enabled operating model.

Dave Mayes, Tax Principal at KPMG US, stressed the importance of this in achieving greater efficiency and compliance: "Having a common data platform can help organizations pull together data from multiple sources, including HRIS, travel vendors and employee location tools, into one model. That's what allows organizations to automate processes and solve for compliance through technology."

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Technology investment is only the beginning — integration and ambition drive real value

Technology investment at this scale is becoming hard to avoid, and organizations that delay risk falling behind. Investment alone, however, is not enough. Getting real value from it depends on two things in particular.

The first is interoperability. Tools need to work well together and with the wider external platforms mobility depends on. Where legacy systems remain, there should be a clear plan to retire them, not just add another layer on top. The goal is to create a more connected operating environment that improves visibility, strengthens governance and supports better decision-making across the mobility program.

The second is ambition. Automation is close to a baseline requirement for any modern program, but leading organizations are not stopping at simple time savings. They're looking to embed AI into day-to-day operations and across the program, using it not only to automate tasks but also to support analysis, forecasting and more informed business decisions.

The opportunity isn't just to help mobility teams do the same work faster. It's to give them the tools and insight to manage risk better, bring clearer evidence to the business and play a stronger role in shaping organizational decisions.

Key actions for mobility leaders

- Redesign processes before adding new technology. Automating inefficient ways of working can amplify existing problems rather than solve them.
- Identify where disconnected systems, spreadsheets, and manual hand offs create the greatest operational friction and compliance risk.
- Engage early in enterprise technology discussions so mobility needs are reflected in HR, tax, payroll, travel, and workforce platforms.
- Focus technology investments on improving data connectivity and visibility across the mobility process, rather than standalone solutions.
- Expand AI usage beyond administrative tasks into forecasting, decision support, compliance monitoring, and program insights.
- Develop a practical road map to reduce manual processes and spreadsheet use, starting with areas where automation will have the biggest impact.

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Managing volatile compliance

03

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Regulatory complexity is intensifying the compliance burden on mobility programs, particularly among the least strategically mature.

Sweeping regulatory shifts, increasingly complex tax and immigration rules, and wider geopolitical tension are all making the movement of people considerably riskier. Andrew Vincett noted that, "The range of issues that this new world of unconventional mobility attracts is much greater and more complex. The authorities are also much better at using data and digitizing tax systems to more accurately and strategically identify compliance gaps. If you identify one failure at the employer's payroll level, that might affect thousands of people."

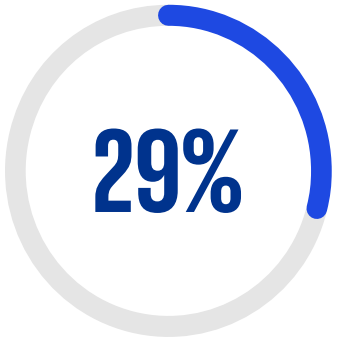
It's of little surprise, then, that ensuring compliance is now the leading challenge reported across global mobility, cited by 30 percent of respondents as a top three challenge, up 4 percentage points from last year.

Key pain points continue to challenge global mobility programs

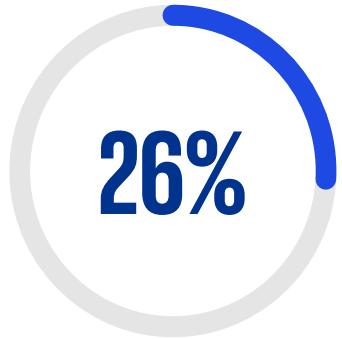
(Respondents ranked top three challenges)



#1 Ensuring broader compliance (26%, 2025)



#2 Demonstrating ROI (31%, 2025)



#3 Partnering effectively with the business (19%, 2025)

This pressure is not evenly felt. Less strategic programs are disproportionately weighed down by it, with 41 percent citing compliance as a key challenge compared with just 25 percent of the most strategic.

Compliance sits at the foundation of mobility maturity. Without the ability to ensure the compliant movement of people, organizations face considerable risk, regardless of how strategic they otherwise aim to be.

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Part of the challenge in ensuring compliance is that many organizations still lack the infrastructure to manage this well.

Though this is plainly top of mind for most programs, over one in five organizations admitted they lack a formal business travel compliance program altogether.

Where managed, responsibility is scattered across travel departments (25 percent), HR (16 percent), and other stakeholders. Mobility has a seat at the table (18 percent), but not a leading role.

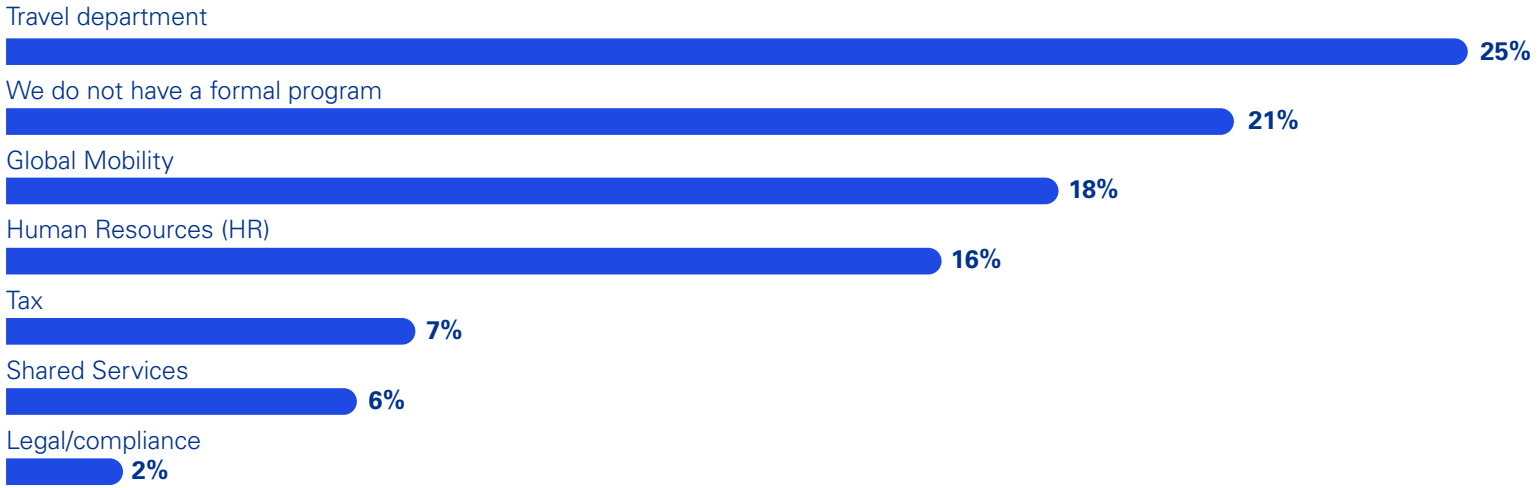
Alison Shipitofsky stressed that documented accountability matters just as much as the policy itself: "Your standard RACI chart, and not just having the policy itself, is really important right now. Because if and when you get audited by a regulatory authority, they will look at your processes and whether they're documented. That's stop number one for an auditor."

Immigration and payroll compliance illustrate this same pattern.

Immigration is the leading compliance risk monitored for business travelers, cited by 49 percent of respondents. Nearly a third (32 percent), however, lack a specific immigration policy, rising to 56 percent among less strategic organizations.

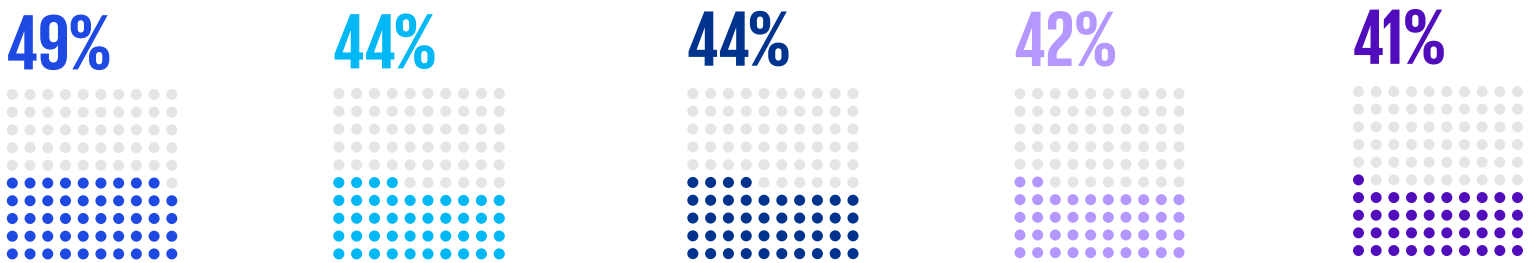
Where organizations do have immigration policies, ownership remains divided. Two-thirds (67 percent) believe mobility plays a significant role in their organization's immigration strategy, but 42 percent report HR also plays a sizable part, and nearly all (95 percent) partner with third parties for immigration support in some capacity.

Who is taking ownership of business travel compliance



Note: Response for "Other — 6%" not included.

Key compliance risks tracked for business travelers



Note: Other categories provided in the survey, though not selected within the top five, included: Regulatory risk, Personal Income Tax, Domestic/EU labor laws, US domestic compliance, Posted Worker Directive (EU), We do not monitor compliance risks, and Other.

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Similarly, while practically all programs have a formal payroll process for mobile employees, most combine multiple approaches rather than relying on one model.

Centralized global platforms (44 percent) and in-house teams with local expertise (43 percent) are the most common, though manual processes such as spreadsheets or SharePoint remain in use by 39 percent. Outsourcing plays a substantial role here too. A third rely on local in-country or global payroll providers, and 35 percent describe an explicitly blended in-house and outsourced model.

The challenge for mobility isn't only managing these evolving compliance issues. It's also how mobility works with the many teams and functions involved, both internally and externally, while keeping pace with local regulations and tax structures.

The challenges in meeting local payroll requirements across jurisdictions

(Respondents selected up to three challenges)



Note: Response for "Don't know — 2%" not included.

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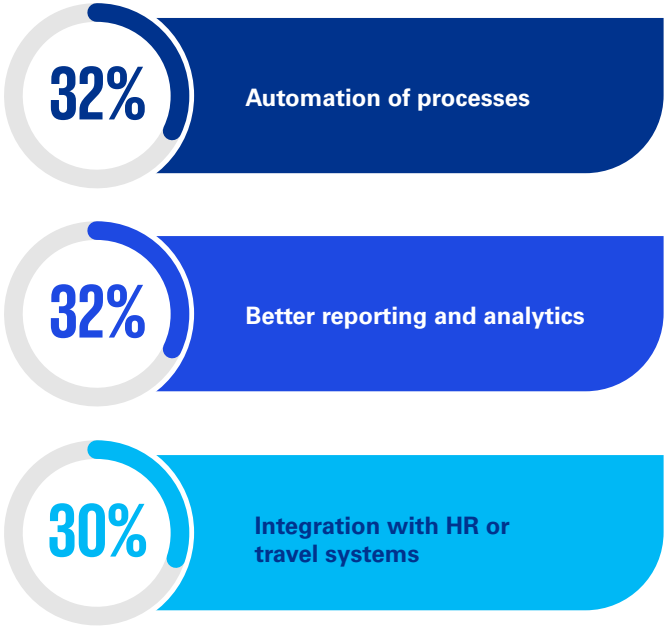
Investment is slowly moving toward reporting and automation. Yet the value depends on organizations first establishing reliable data management systems and the skills to apply them.

Organizations are increasingly using technology to track and manage business travel compliance. Around 61 percent already use HR or travel platforms for this purpose, and 48 percent use dedicated compliance software. Still, just under half (47 percent) continue to rely on manual tracking.

Technology use in managing immigration specifically remains mostly "moderate," described as such by 41 percent, with only 6 percent using it extensively.

Better reporting and process automation are the top stated priorities for organizations looking to improve here, cited by 32 percent each. But intent to invest further remains uneven, with only 12 percent planning to invest within the next year, rising to just under a quarter (24 percent) within the next two.

Top three priorities for improving business travel compliance over the next 12–24 months
(Respondents selected up to three priorities)



Mobility recognizes the transformative power of technology, and how it can support more efficient compliance efforts. But it also recognizes that structure, ownership, data quality and integration must be in place for this to work. This is a problem Andrew Vincett argued mobility faces more than most: "The ability for AI or any analytical software to be effective depends on the quality and organization of the data that it's looking at, and mobility's got a particular problem there because it's so complex and there's data from many, many different sources. Being able to organize that in a coherent way, so that you can stand a chance of using technology to identify where there might be compliance gaps or risks, is the first challenge."

Overall, compliance should be managed as an integrated capability, supported by strong, documented accountability, connected data and embedded controls.

The priority isn't simply more technology, but stronger governance, data quality and process discipline. By targeting high-risk gaps and automating repeatable controls, mobility can reduce the compliance burden and create a stronger foundation for more strategic value.

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Compliance is increasingly built into mobility processes

Leading organizations in this survey are moving away from reactive compliance models to compliance by design. Instead of chasing issues once a move or trip is underway, they embed tax, immigration, payroll and business travel requirements into mobility processes from the outset. Automated pre-travel assessments, approval workflows and exception management help identify potential exposures earlier and reduce costly remediation later.

Clear accountability is essential to effective compliance governance. Compliance responsibilities often sit across mobility, HR, travel, tax, payroll and external providers, which can leave gaps even where formal policies exist. Organizations with clearly defined decision rights, escalation paths and ownership across key risk areas are better positioned to maintain consistent oversight, respond quickly to new issues and demonstrate control to regulators.

Risk-based automation can strengthen compliance and cut administrative effort. High-volume, repeatable activities are often the best candidates for automation, particularly where missed events could create significant or population-wide exposure. By targeting technology at higher-risk controls, organizations can improve consistency, reduce manual intervention and free mobility teams to focus on more complex compliance matters.

Together, these practices reflect a shift to managing compliance as an integrated capability, supported by clear accountability, connected data and embedded controls. Technology is a critical enabler, but strong governance, reliable data and disciplined process remain fundamental to sustainable compliance.

Key actions for mobility leaders

- Embed tax, immigration, payroll and business travel checks at the point a move or trip is initiated.
- Introduce automated pre-move and pre-travel assessments, approval workflows and exception management to flag issues early.
- Review compliance roles and responsibilities, confirming clear ownership and escalation paths for each major risk area.
- Rank manual controls by volume, regulatory risk and effort, prioritizing high-value opportunities for automation.

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AI-generated image

Partnering with the business

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Key internal stakeholders and talent functions remain detached from mobility teams.

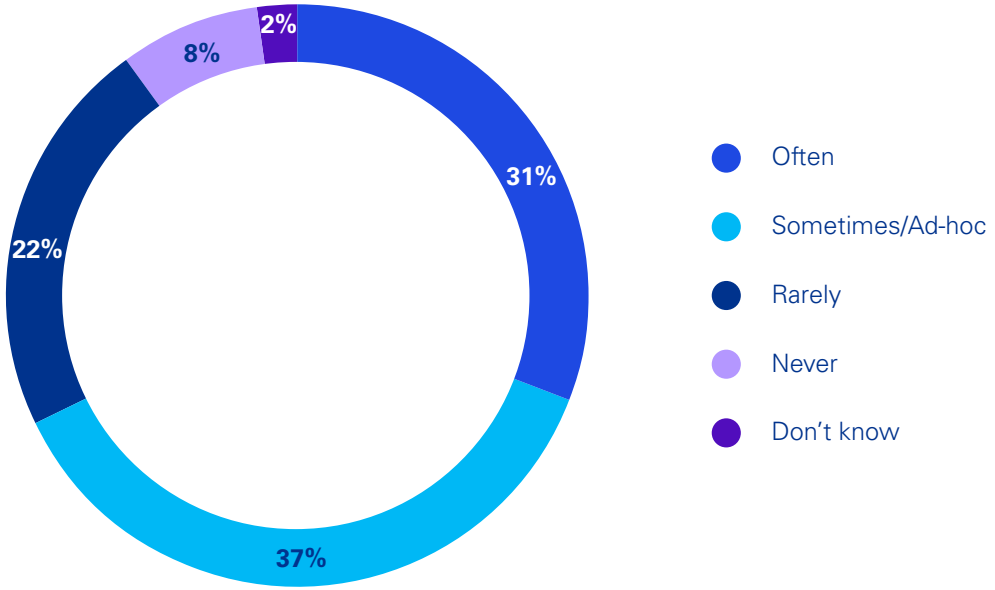
As we have explored, rising economic pressures are pushing mobility to focus on operational gains, such as reducing costs and improving efficiency. This is a valuable foundational step toward strategic maturity, but on its own, it risks exacerbating one of mobility's biggest challenges: its disconnect from the wider business.

Partnering effectively with the business is the third-biggest reported challenge for mobility today, cited by 26 percent of respondents as a top three challenge. Among the least strategic organizations, it becomes the single biggest challenge, cited by 43 percent, even ahead of ensuring broader compliance at 42 percent.

Research suggests this partly reflects mobility's increasingly siloed structural position. One in five programs now sit within shared services, up from just 8 percent last year, and fewer are embedded within talent management, down from 40 percent to 33 percent.

Collaboration with talent management has also become markedly less frequent, with the share reporting they "often" connect to discuss the talent needs of the business. This has nearly halved since last year.

How often mobility connects with talent and HR on business needs



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Beyond structural positioning, mobility's limited ability to communicate its value creates a bottleneck to wider engagement and understanding.

Mobility admittedly rates its own ability to measure and communicate its strategy to stakeholders poorly, at just 2.6 out of 5 on average, with fewer than 13 percent rating themselves highly (4 or 5).

Even the most strategic organizations fall short, with only 18 percent saying their mobility strategy is widely communicated and understood by stakeholders, down to just 6 percent among the least strategic.

Organizations that have tackled the foundational areas of compliance and technology explored earlier in this report are better placed to focus here, but maturity in those areas is not sufficient.

This is where demonstrating value and ROI becomes central, and it remains one of mobility's longest-standing challenges.

Mobility has historically shied away from ROI. But given its strategic ambitions, there appears to be a growing focus on demonstrating this more effectively.

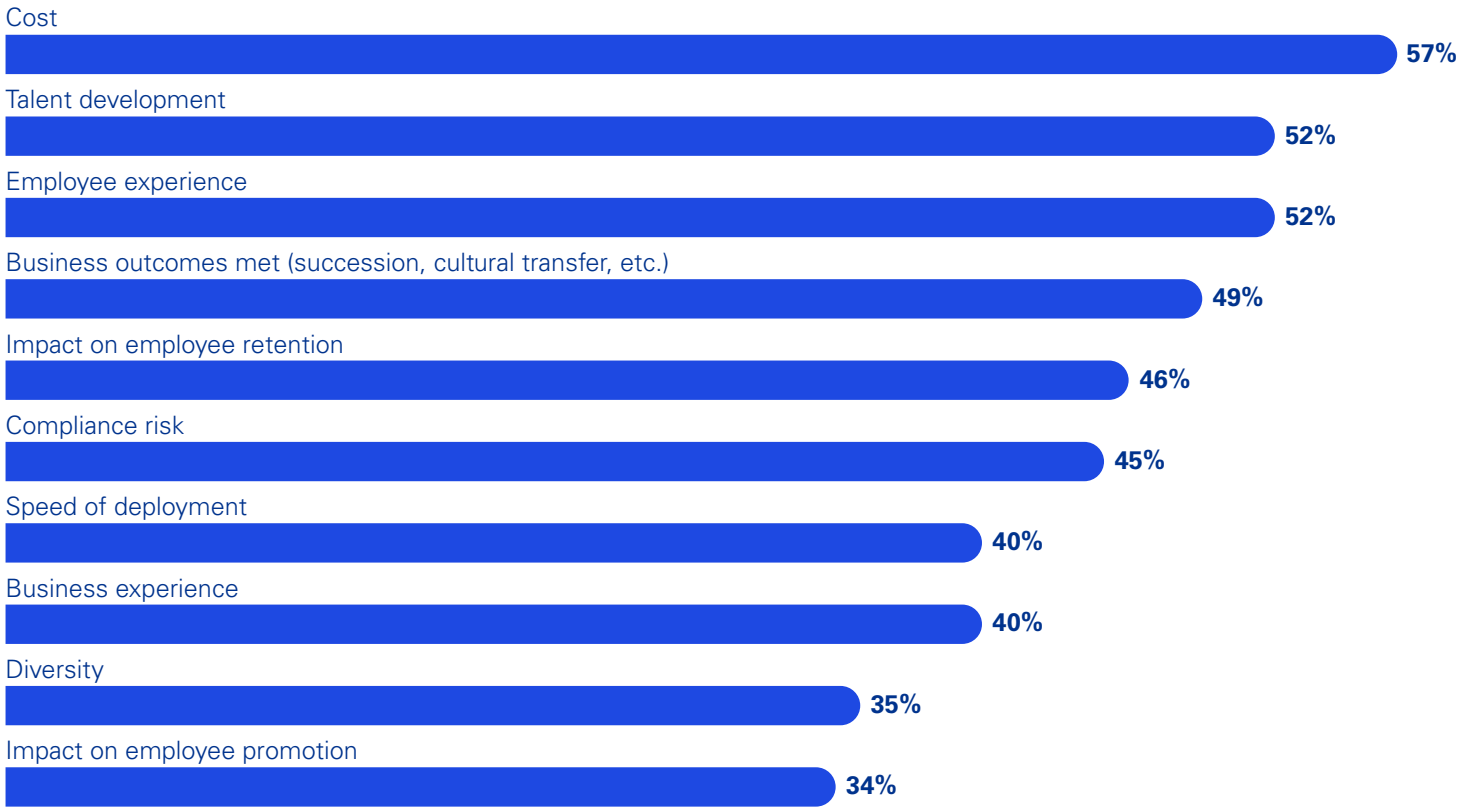
The ability to demonstrate ROI has risen sharply as a stated objective for mobility programs, up 9 percentage points since last year (7 to 16 percent) and now cited by just under one in five (18 percent) of the most strategic organizations as a top objective.

Yet it remains mobility's second-biggest reported challenge overall, at 29 percent (just behind broader compliance).

Consequently, only around 12 percent of organizations report consistently measuring ROI, and just under half (48 percent) admit they don't discuss it at all. This gap is striking, given how central proving value is to mobility's future.

Where ROI is measured, cost savings still dominate the calculation, cited by 57 percent as a key factor. This risks presenting a narrow view of mobility's overall value. The most strategic organizations, however, are starting to move past this, and blend cost savings with broader business and employee metrics.

Key factors used to assess mobility ROI
(Respondents selected all that apply)



Note: Response for "Other — 1%" not included.

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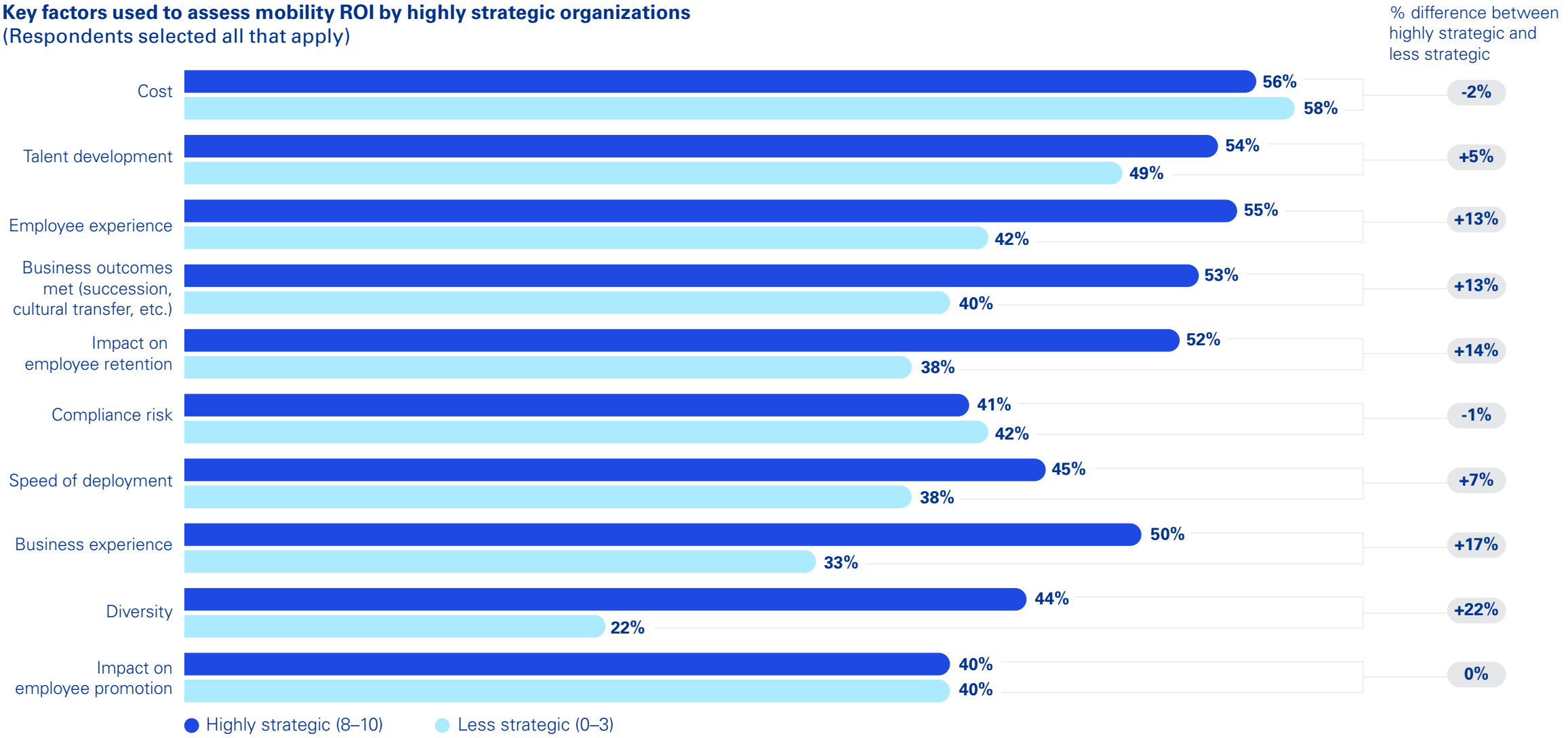
Key factors used to assess mobility ROI by highly strategic organizations
(Respondents selected all that apply)



Note: Response for "Other — 1% (Highly strategic), 2% (Less strategic)" not included.

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As Thomas Efkemann outlined: "There's much more to moving the person from A to B just as fast as possible and then with the lowest cost. There are operational KPIs, but these should be combined with other KPIs, like success stories of an executive or a person who was on an assignment."

This challenge cuts both ways. It's not only about communicating strategic value more effectively, but also about understanding what the business actually values.

Laura Tippett explained that the key to doing this effectively is "in figuring out what's important to your mobility program and reporting on it, not just from a cost perspective. If you can show the impact of having a positive experience to the business and/or employee, and quantify that, not just with the numbers but qualitatively as well, you'll get more buy-in as to why mobility is important."

Building a mobility champion at the C-suite or board-level can also be an extremely valuable tool to help mobility become more embedded in strategic conversations. As Andrew Vincett cautioned, however, there is no universal playbook for this: "There's never going to be a one-size-fits-all approach. If you took mobility leaders at 20 companies and asked what the value proposition for mobility is to convince their senior stakeholders it's worth investing in, you could easily find you get 20 different messages. You've got to understand what the drivers of *your* audience are and be able to pull on them when you're trying to communicate the value proposition of mobility in *your* company."

Taken together, closing this gap may mean connecting more deliberately with talent, diversifying ROI and success metrics beyond cost, and building powerful stakeholder relationships rather than relying on the strength of the data alone.

None of this happens without the right people and skills in place to lead it. But what will this next generation of mobility talent look like?

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Turning organizational priorities, data and insights into a compelling mobility value story

Mobility ROI is not a single formula. It's a flexible framework for assessing whether mobility investments deliver what matters most to the organization. The aim is to connect mobility activity to outcomes that leaders care about, using data to tell a clear, credible story.

Consider the following framework:

1. **Start with business priorities.**
   Be clear on what the organization is trying to achieve and what it expects mobility to deliver.
2. **Use benchmarking to add context.**
   Look at market data to understand how mobility is evolving, how your program compares, and how these insights impact priorities.
3. **Decide what to measure.**
   Determine what elements are most important to measure and weave these into the mobility value story.
4. **Work out which data you can use.**
   Map what data you already have, what data can be obtained to support these elements and how it can be brought together.

The last step is often the hardest, as data sits in many systems and formats. AI can help simplify bringing together disparate data, formatting and analyzing it, querying it, and creating visuals that best support your story.

Depending on the organization's priorities, the framework might include more operational measures like efficiency and compliance; it may include measures tied to specific business outcomes, more people-focused outcomes, or a combination of all three.

The mobility ROI exercise can connect mobility's operational priorities with its strategic ambitions. It can demonstrate where mobility already creates value, identify opportunities for improvement, and provide a common language for discussing mobility's contribution to the business.

Key actions for mobility leaders

- Map mobility's impact to your organization's key priorities, rather than chasing a fixed ROI formula.
- Identify your customers, including employees and business stakeholders, and define the value mobility creates for each.
- Define the key data points that best demonstrate mobility's impact and importance.
- Set up processes and an operating model that allow you to track and report on these data points over time.
- Work with vendors and use AI tools to bring together data from multiple systems and surface the most compelling narrative for leadership.

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AI-generated image

Developing the next generation

05

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As mobility aims to become more strategically influential across the organization, the skills needed to run it will evolve too.

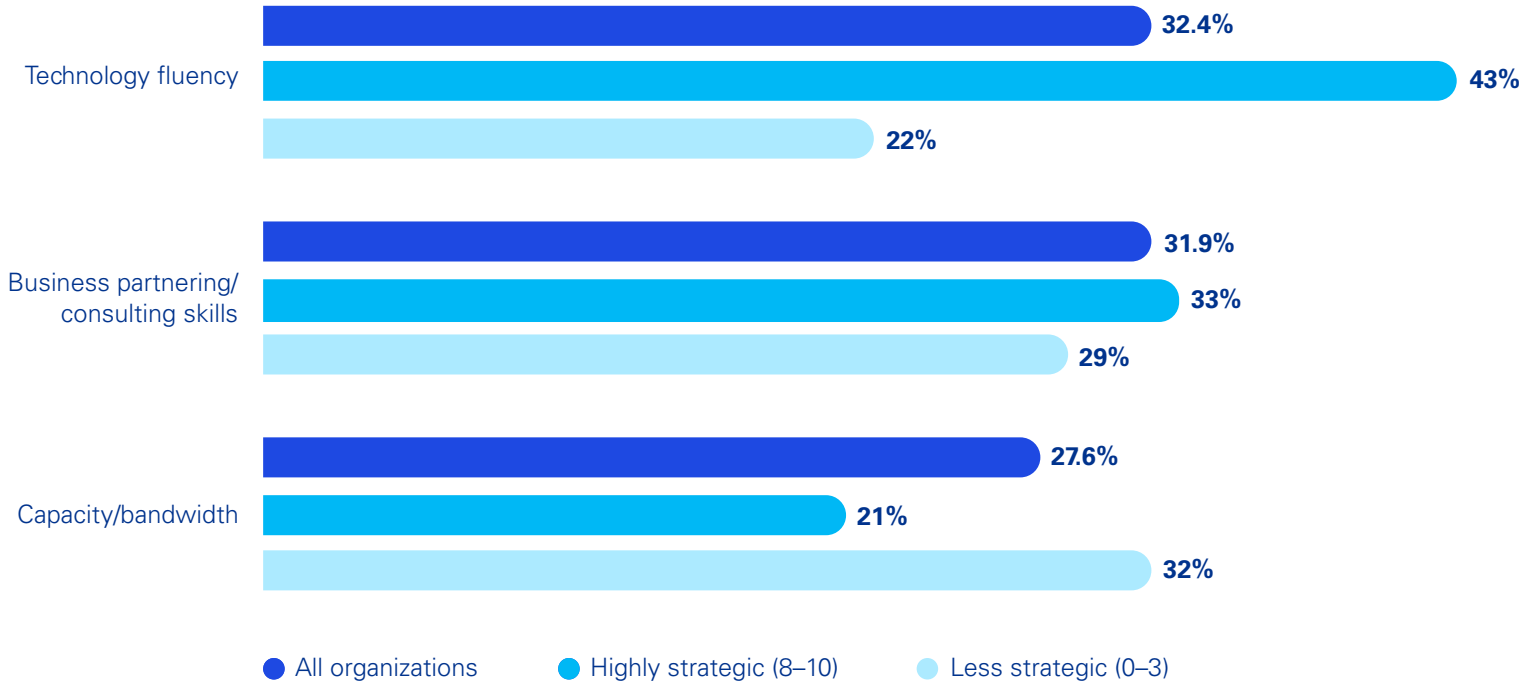
Dave Mayes highlighted how "supporting a mobility function, or leading a mobility function, is going to look different tomorrow than it does today," and that realigning the skill set to match is where much of the industry's focus now sits.

Training and retaining mobility team members has risen sharply as a reported challenge year on year. It's 9 percentage points higher among the most strategic organizations than the least, 26 percent versus 17 percent.

Highly strategic organizations recognize this challenge and are already starting to act. Developing skills in their teams remains a top priority among the most strategic organizations, ranked joint second as an objective, at 28 percent (versus just 17 percent among the least strategic).

Read as a sign of self-awareness, the more ambitious the goal, the more visible the skills shortfall becomes. That raises the obvious question: what skills will future mobility advisory actually need, and what's currently missing?

Top three capability gaps that most hold back modern mobility advisory
(Respondents selected up to two options)



Note: Other categories provided in the survey, though not selected within the top three, included: Change management, Stakeholder alignment, Data/insights storytelling, Understanding of alternative workforce models and Don't know.

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Mobility capacity is tied down by process-heavy tasks, and while technology offers a potential solution, the right skills must also be in place.

Behind only technology fluency (32.4 percent) and business partnering and consulting skills (31.9 percent), capacity and bandwidth (27.6 percent) was one of the biggest barriers to shifting toward more modern, advisory-led mobility.

Looking at how in-house mobility teams allocate their time day to day, just 14 percent is spent on employee case management, while 57 percent goes toward other operational tasks such as reporting, payroll, technology, compliance and cost.

How mobility teams spend their time across core activities



As technology investment becomes more commonplace and mobility becomes further integrated into these platforms, this should help ease exactly this kind of capacity pressure. Early evidence suggests it already does, as capacity and bandwidth are markedly less of a constraint where technology is more mature, cited by just 21 percent of the most strategic organizations compared with 32 percent of the least.

This relief comes with a catch, however: it brings greater demand for technological fluency, which, as seen above, was cited as the biggest barrier.

Among organizations that consider themselves more strategic, technology fluency is an even greater concern, rising to 43 percent, suggesting that advanced technology capabilities matter more, not less, as mobility matures.

Future mobility professionals should aim to understand how to use these tools and the data behind them, not simply have access to them.

Becoming more strategic also means mobility experts need to advise, not just execute. That requires the right experience and skill set.

Underlying this shift is mobility's need to become a key advisor to the business on matters relating to talent and employees.

Mobility agrees this demand exists, with 63 percent saying mobility is expected to provide subject-matter-expert-level advisory guidance to wider specialist teams. However, as shown above, business partnering and consulting skills were the second biggest gap respondents cited.

Revisiting mobility's current time allocation, it's easy to see why current programs don't develop these skills. While we showed that 57 percent of time was spent on mostly operational tasks, under 10 percent is spent actually understanding the business, and under 9 percent on aligning with talent teams. Both were also down a few percentage points from last year.

Thomas Efkemann admitted this is something he believes mobility is typically missing, and is a specific skill set that needs to be nourished through both greater experiences and understanding of the greater business implications: "If you want to be strategic, there's a consulting skill set you need to have. It's not just reading down policy in letters. These are the skills and experiences that are currently missing in mobility."

While organizations recognize the need to upskill, many are also starting to look outward.

Automation should give teams more time to move out of day-to-day process work and toward fully understanding the business impact of moves, putting them in a stronger position to offer this kind of guidance.

However, as Andrew Vincett explained, some are increasingly reaching outside the traditional mobility profile to bring in these specific skill sets: "Mobility functions are starting to review the skills they have across the team and are increasingly bringing in individuals who may not necessarily have conventional mobility experience but offer a different range of skills and expertise instead."

As we've explored throughout this report, mobility's evolution isn't slowing down. Technology and AI investment can continue to streamline routine processes and compliance management, but this may only increase the pressure on mobility to demonstrate its value elsewhere.

Firms need to respond by reassessing their team capabilities, upskilling existing staff, and using technology or external providers to release the capacity needed to make that shift, the final and perhaps most important step on the journey toward strategic mobility.

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Building the skills and capacity for a more strategic mobility function

As technology takes on more routine and process-driven work, the next stage of mobility transformation will depend more on the capabilities of the people behind it. Technology can free up time, but it doesn't, on its own, make mobility more strategic. Mobility professionals need the skills and confidence to use technology and data effectively, understand the broader business context and turn their expertise into meaningful advice for stakeholders.

This allows mobility leaders to be more intentional about how they develop their teams and how time is used. Instead of treating upskilling as a one-off training exercise, leaders can focus development on the capabilities that matter most for the function's future. That means giving teams greater exposure to the business and talent agenda, and using automation, external providers and new talent profiles to create or access skills that may not exist within traditional mobility teams today.

Key actions for mobility leaders

- Focus development on the capabilities that matter most. Prioritize technology and data fluency alongside business partnering, consulting and core mobility expertise.
- Create opportunities to build advisory experience by giving team members greater exposure to business, talent and workforce discussions so those skills develop through experience, not training alone.
- Be intentional about where new capabilities come from. Assess which skills to grow within the team and where different talent profiles, external providers or technology can fill gaps more effectively.
- Redirect capacity toward higher-value work. As technology and automation reduce process effort, deliberately create space for teams to focus on business understanding, insight and advisory activities, rather than letting freed capacity be filled with other operational tasks.
- Measure progress by how the work changes. Look beyond training metrics and consider whether the team spends more time engaging with the business, shaping decisions and adding strategic value.

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The journey ahead

As our research has shown, being 'strategic' means different things to different organizations. No single blueprint defines what 'good mobility' looks like, and what works for a highly regulated multinational with thousands of moves a year will not necessarily work for a mid-sized organization just beginning to formalize its program.

What is consistent, however, is the backdrop against which every organization is now operating. As the world grows more regulated and more volatile, organizations remain committed to moving people across borders, and mobility plays an intrinsic role. Realizing that role depends on two things: understanding where your program sits on its own strategic journey and partnering with the wider business to close the gap between where it sits and where it wants to be.

The four-stage maturity curve set out earlier in this report provides a practical way to think about that journey. Progress rarely runs in a straight line, and organizations may be more advanced in one stage than another. Under each stage, we have set clear and actionable recommendations for any organization with serious ambition to move forward.

How to be operationally controlled

- **Proactively address immigration and other geopolitical and regulatory risk.** Given how quickly the regulatory landscape is shifting, organizations that only respond after the fact expose themselves to unnecessary cost and risk.
- **Apply a consistent approach to tax, payroll and other business travel considerations**, underpinned by clear ownership and escalation paths across teams. Where responsibility for immigration, tax and payroll sits with different functions, a documented RACI often creates a defensible position.

How to be data-enabled

- **Embed AI at an operational level rather than relying on ad hoc use.** The gap between organizations experimenting with AI and those embedding it into core workflows is where much of the value, and much of the governance risk, actually sits.
- **Manage the technology landscape effectively.** Fewer than one in ten organizations run a single end-to-end platform, and most rely on a mix of in-house systems and outsourced providers across payroll, tax and immigration. To guide impactful decision-making, organizations need to ensure data integrity across their technology network.
- **Build technological fluency and expertise internally**, so that data and system investments translate into insight, not just infrastructure.

How to be business-connected

- **Demonstrate clear ROI that goes beyond cost cutting.** Value should also be measured against talent retention, speed of deployment, workforce planning and other wider business outcomes.
- **Communicate stories behind that value.** Mobility has historically been reluctant to promote its own impact, and the organizations gaining influence are the ones actively sharing case studies and outcomes rather than assuming the value will speak for itself.
- **Align with senior stakeholders and identify a champion for mobility at leadership level.** Influence is rarely won through data alone; it's won through a relationship with someone who can carry mobility's case into rooms it's not yet in.

How to be strategically influential

- **Use automation gains to build greater internal capacity**, reducing time spent on process tasks so that time can be reinvested elsewhere.
- **Develop consultative and business partnering skills within the mobility team.** These remain the most significant capability gap standing between an efficient program and an advisory one.
- **Increase mobility's involvement in strategic talent development and planning.** Programs trusted to shape these decisions, rather than simply execute the moves that follow, are the clearest sign of a function that has become strategically influential.

Progress against this curve will not look the same for every organization, and it shouldn't. What distinguishes the organizations pulling ahead isn't the pace of their progress but the deliberateness of knowing which stage they're in, what the next one requires, and how they're investing accordingly. That, ultimately, is what strategic mobility will look like in practice.

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About the research

625 Global mobility professionals

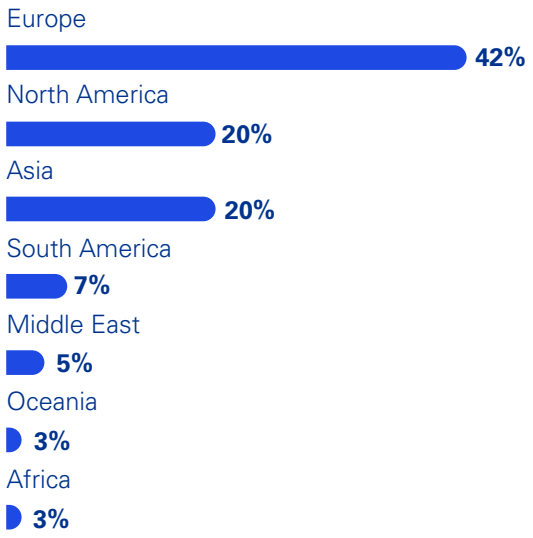
26 jurisdictions

13 industries

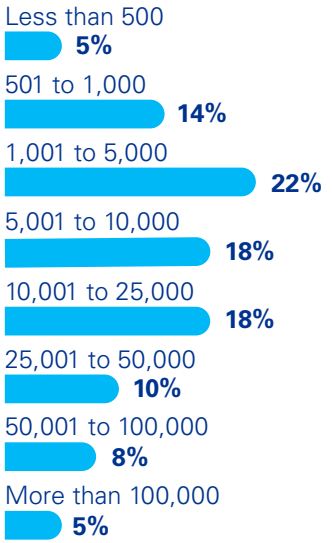
The 2026 KPMG Global Mobility Benchmarking Survey was conducted from 29 May to 27 July 2026 and received responses from 625 global mobility professionals, the highest participation in the survey's history. Respondents represented multinational organizations across a wide range of industries and geographies.

This year's survey was refined to focus on the issues mobility leaders tell us matter most: changing global immigration rules and talent agendas; evolving mobility tax and social security requirements; rising tax, payroll and permanent establishment (PE) risk; how organizations define and measure mobility ROI; and how AI, technology, data and scalable compliance are reshaping mobility programs and the role of the modern mobility advisor.

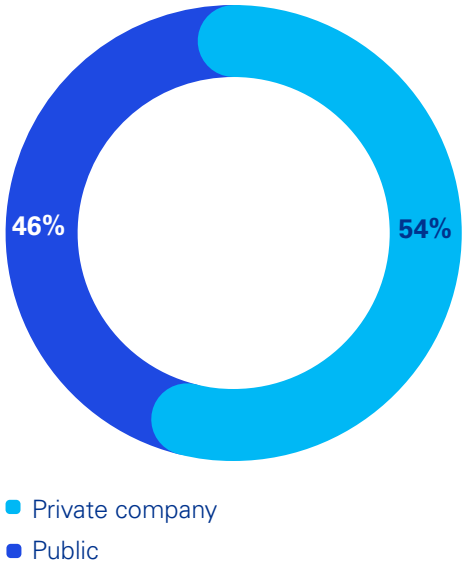
Geography
Region



Organization size
Split by employee size



Organization type
Split by organization type



This research was conducted in collaboration with Meridian West, an independent research and advisory firm specializing in market and client intelligence for professional services. Meridian West supported the research design, fieldwork, analysis, and report writing.

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How KPMG can help

Turning survey insights into action

The Global Mobility Benchmarking Survey shows a clear pattern: mobility teams are under pressure to be more strategic, more compliant and more efficient, all at once. KPMG Global Mobility Services (GMS) professionals can help you do exactly that.

- Run a smarter, more efficient mobility program
- Stay on top of tax, immigration and payroll obligations
- Use data to deploy talent where it creates the most value
- Give mobile employees a simpler, more consistent experience

We combine deep technical knowledge in tax, immigration and compensation with advanced data and technology, so you can make faster, better decisions and keep your program resilient, even in unpredictable times.

How we support your mobility agenda

KPMG GMS offers a holistic approach to managing a globally mobile workforce by integrating tax, technology, immigration and mobile administration services so your program is easier to run and control. Whether you are entering new markets, managing deals or optimizing an existing footprint, we can help you streamline your mobility program and support compliance.

- Smart mobility management
- Global mobility program design and governance
- Relocation and tax advisory services
- Immigration and workforce strategy
- Talent strategy and mobility planning

With more than 5,000 professionals in 200+ jurisdictions supporting over 500,000 mobile employees for 8,000+ clients worldwide, we provide a consistent experience wherever you operate.

Move with confidence

Contact KPMG Global Mobility Services to build scalable, compliant global mobility frameworks that turn survey insight into action.

KPMG. Make the Difference.

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