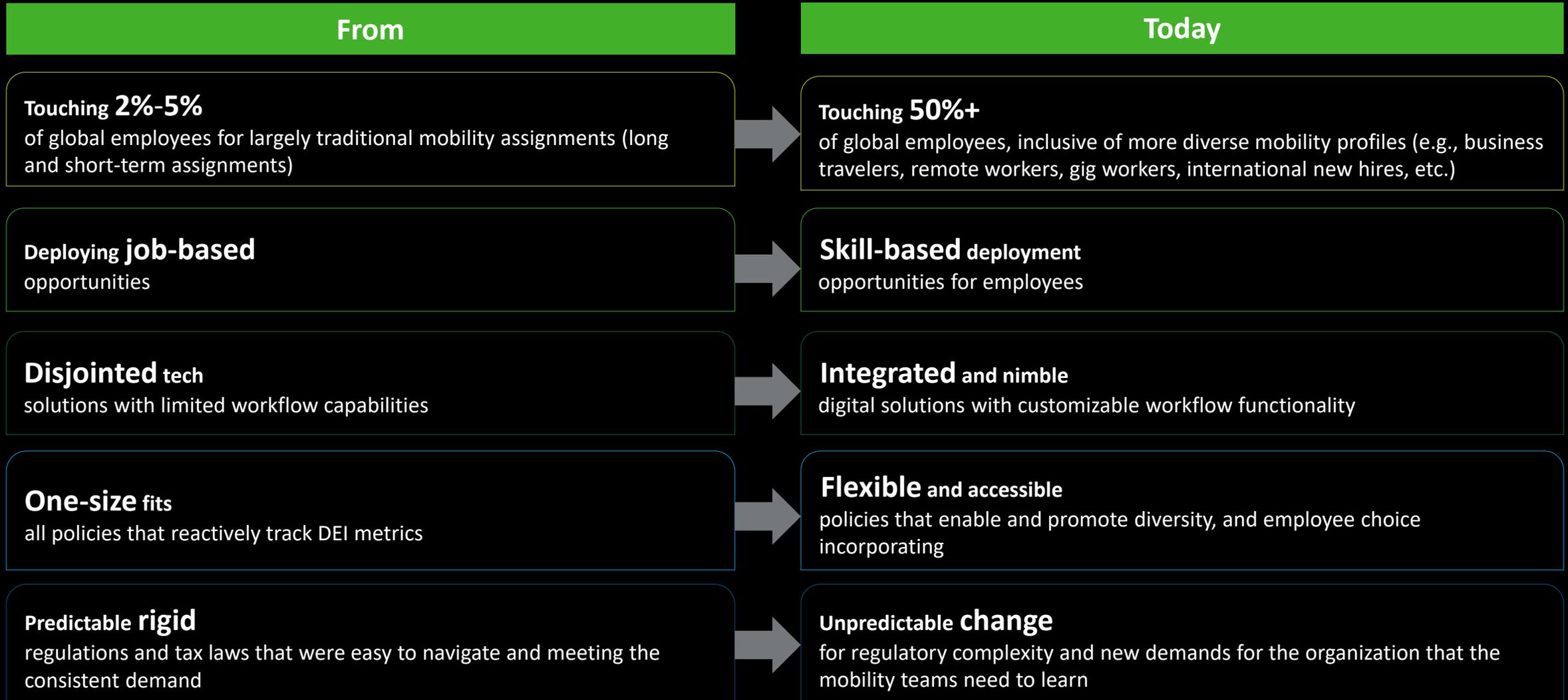


## Global workforce trends

November 2023

# Today's Evolving Market Landscape

Global Talent Mobility plays a critical role in enabling a newly complex and dynamic global workforce. Many organizations are evolving to satisfy the rapidly changing needs of the business and the growing workforce it serves.



# 2023 Global Workforce Trends

## The demand for global movement

### Borderless Skills-Based Movement

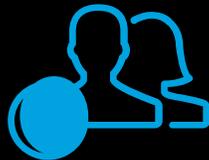
In a world where talent shortages are one of organizations' **most daunting challenges**, Global Talent Mobility can **tap into** a broader talent pool—and reduce recruitment cost—by matching candidates to opportunities **based on skills** and not geography.

### Expanded Risk

Financial, operational and compliance risks are familiar territory for organizations, but **societal, environmental, and personal safety risks** are creating new organizational demands, and are considered a top priority by many **Talent mobility leaders**.

### Growing Distributed Workforce

Changes to **how and where** work gets done, and the values it aligns to have had a profound impact on Global Talent Mobility programs, challenging teams to **align with stakeholders** across the organization and display extreme agility. Strong **program leadership** and a **jointly defined mission with employees** are critical.



## Ecosystem optimization

### Enable with Technology

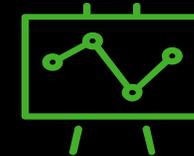
Global Talent Mobility can enable today's dynamic and disperse workforce through **the right technology strategy**. By prioritizing integrated technology solutions, organizations can address a wide range of risks and optimize processes, costs and employee experience.

### Data-Driven and AI-Powered Insights

**New technologies such as AI** have evolved significantly over the past few years, and digitized data has grown exponentially. Global Talent Mobility has the opportunity to tap into these insights and technologies to improve **employee experience, compliance, and cost efficiency** with a well-defined data strategy.

### Do More with Less

Global Talent Mobility teams need to **prioritize efficiency and scale** while still considering purpose-driven initiatives such as diversity, equity and inclusion (**DEI**) and **sustainability**. As result leaders are taking a fresh look at their available resources and embracing new approaches.



# Borderless Skill-Based Movement

## Organisational challenges

Organisations may face an **urgent need to overcome talent shortages**; they may need to **rethink how they fill in opportunities** by sourcing talent **without geographical limitations** and enhancing skillsets through cross-border opportunities.

## The demand for global movement

### Workforce trends



**71%** of CEOs surveyed have cited talent shortages as their **top external challenge** to meeting their business objectives<sup>1</sup>



**93%** of leaders said that **moving away from a focus on jobs is important or very important** to their organization's success<sup>2</sup>

(1) 2022 Fortune/Deloitte CEO Survey (175 leading CEOs within 15 industries) – Winter 2022.

(2) [2023 Global human capital trends | Deloitte Insights](#).

# Expanded Risk

## Organisational challenges

Beyond the operational, financial and compliance risks that organizations are **generally set up to mitigate, external disruptive risks** such as environmental, social, and political conditions can greatly **impact how and where work is done** and how supported employees feel within their roles.

## The demand for global movement

### Workforce trends



**81%** of organizations shared that **anticipating and considering broader societal and environmental risks** when making workforce decisions is important to very important to their organization's success<sup>1</sup>



Yet only **19%** of organizations feel **ready to anticipate and consider** broader societal and environmental risks when **making workforce decisions**<sup>1</sup>

(1) "Elevating the focus on Human Risk", Deloitte Insights, Jan 9, 2023

# Growing Distributed Workforce

## Organisational challenges

The pivot toward distributed work **has increased** the scope and impact of Global Talent Mobility. **Hybrid / Remote Work** programs rely on Global Talent Mobility's ability to effectively partner with a **diverse group of stakeholders and bring increasing complexity**.

## The demand for global movement

### Workforce trends



**43%** of organizations want to focus on **aligning their mobility program** with talent strategy<sup>1</sup>



**47%** of organizations believe that by **adding headcount to their mobility team** it would allow them to **administer** their mobility program more effectively<sup>1</sup>



**80%** of organizations shared that they allow **some level of remote and hybrid** model for their employee's ways of working<sup>2</sup>

(1) 2023 Airnic Workforce Globalization, Mobility Outlook Survey.

(2) 2022 Global Remote Work Survey

### Organisational challenges

An **increasingly dispersed** workforce means new employer obligations--many of which are **complex, unclear, and inconsistently** enforced. To **manage the complexity**, organizations have an opportunity to **reimagine the use of technology solutions** and make strategic technology choices that solve for diverse fact patterns.

### Workforce trends



**46%** of organizations shared that **policy and regulation** are the top challenges to enable cross-border remote work<sup>1</sup>



**93%** of business leaders believe that using **technology to improve** work outcomes and team performance is **very important or important** to their organization's success<sup>2</sup>



**22%** believe their organizations are **very ready** to use technology to improve **work outcomes and team performance**<sup>2</sup>

(1) *a2022 Global Remote Work Survey*

(2) *2023 Global human capital trends | Deloitte Insights*

### Organisational challenges

Organisations **aggregate large data** sets, many of which are underutilized because they span multiple systems or are difficult to analyze. By **centralizing data and enhancing data quality / reliability**, it is possible to gain insights that drive **policy development, enhance compliance, promote DEI outcomes, and measure ROI**.

### Workforce trends



**83%** of organizations believe that leveraging worker data to create **benefits for both the organization and its workers** is important or very important to their organizations' success<sup>1</sup>



Only **19%** of organization believe they are **very ready to leverage** their worker data<sup>1</sup>



**86%** of business leaders say **measuring DEI outcomes** is important or very important to their organizations' success<sup>2</sup>

(1) [2023 Global human capital trends | Deloitte Insights](#)

(2) [2022 Deloitte Workforce Solutions DEI Survey](#)

# Do More with Less

## Ecosystem optimization

### Organisational challenges

In a tight economic environment fewer resources may be allocated **to internal functions**, including Global Talent Mobility, **although pressure to demonstrate value remains high**. Teams are balancing the demands of **optimization, expanded scope, and purpose-driven program choices**, all while controlling costs.

### Workforce trends



**75%** of organizations believe that **using new or enhanced technology** would **allow them to manage** their mobility program more efficiently<sup>1</sup>



Only **28%** of organization want to **concentration on simplifying administration and streamlining operations** for the next few years<sup>1</sup>



**51%** of organizations expect to **see an increase** with their **overall global mobility activity**<sup>1</sup>

(1) 2023 Airnic Workforce Globalization, Mobility Outlook Survey



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