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THE NEXT
MINDSET

Human Mobility

From Movement
to **Momentum**:
The Power
of **Collective**
Mobility.

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Index

Introduction

The World in Motion.

Over the past century, human mobility has been shaped by two transformative forces: **the rural exodus to cities and international migration to more prosperous economies.** In 2008, the world's urban population surpassed the rural one for the first time in history: 3.45 billion people versus 3.38 billion. Today, more than 4.6 billion people live in cities, compared with 3.45 billion who remain in rural areas (World Bank, 2025). [1]

Since World War II, humanity has been on the move as never before, with millions of people crossing borders **in search of safety or opportunity**. Migration flows have spiked at moments of war, famine, or economic crisis. Yet, the world remains more sedentary than it appears: around 97% of people still live in the country where they were born, and only 3% reside elsewhere (Hein de Haas, 2024)[2].

This has caused tension, but it has also sparked initiatives for progress. Migration dynamics have driven innovation, inspired entrepreneurship, and helped companies reach new markets, while societies adapt to a more diverse and creatively charged pluralism.

When someone moves, it is never just a person who relocates. It sets off a chain of economic, social, and cultural transformations that ripple through both origin and destination. Each journey rewrites markets, challenges narratives, and reshapes the balance of global talent.

This edition of **The Next Mindset** report invites readers to look beyond the obvious and uncover what lies unseen behind people's journeys. The ability to anticipate and reinterpret change may well be the true competitive advantage for companies, governments, and organizations seeking to lead in a constantly evolving world.

This analysis maps the opportunities emerging from today's major human movements — for those willing to embrace them. It also calls for foresight amid uncertainty, helping identify patterns and advantages that others might overlook.

The report unfolds across four areas of exploration:

- A **geographic overview** examining how major power centers— the United States, Europe, and Latin America— are managing human mobility amid increasing political and social pressures.
- A **value map** that reveals how these dynamics open new growth opportunities across industries such as banking, consumer goods, talent, tourism, education, and healthcare.
- **Real-world case studies** that show how anticipating these trends can become a tipping point in a company's trajectory.
- And a **pioneering perspective through Radar IA**, a tool that combines data analytics and artificial intelligence to analyze how migration narratives are built and shared.

The AI Radar goes beyond data. It merges ethical rigor with strategic vision, interpreting how different regions understand human mobility — harnessing the potential of artificial intelligence while staying rooted in the human experience. The development of the AI Radar draws on a carefully curated selection of sources, languages, and cultural perspectives, providing a global viewpoint that captures the complexities, challenges, and opportunities surrounding a phenomenon that is reshaping our world.

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Charting Global Mobility

The impact of human mobility takes on different shapes depending on where it happens. In the United States, Europe, and Latin America, policies, markets, and social perceptions are being reconfigured at different speeds. Everywhere, one thing is clear: nothing stays the same.

United States: where movement restriction meets market reinvention.

The United States captures a unique blend of attraction and resistance to human mobility, creating a delicate balance that affects decisions in politics, business, and society alike. In April 2025, the country's net migration rate dropped from four million people in 2023 to approximately 600,000 (Pew Research, 2025)[3], mainly due to new border control measures and additional visa requirements (USCIS, 2025)[4].

These regulations have also had indirect consequences across key sectors. The World Travel and Tourism Council (WTTC, 2025) estimates that tourism revenues could fall by USD 29 billion[5], while the Institute of International Education (IIE, 2025) projects a decrease of up to 150,000 international enrollments, equivalent to around USD 7 billion[6]. Beyond the immediate economic impact, this shift raises a broader question: how can the U.S. sustain the global talent flows that have long fueled its innovation and competitiveness?

Meanwhile, industries such as agribusiness, construction, and manufacturing face deepening labor shortages: 73% of agricultural producers report hiring difficulties (USDA, 2025)[7], nearly half a million manufacturing jobs remain unfilled (BLS, 2025)[8] and long-term care will require an additional 8.9 million workers by 2032 (PHI, 2025)[9]. An aging population and low birth rates have intensified reliance on immigrant labor, particularly in healthcare and caregiving roles in rural areas. For businesses, this context drives wage pressure, complicates inflation control, and demands that labor shortages be transformed into opportunities for innovation and investment. — **Bridget Haeg.**

Human mobility is also a powerful catalyst for entrepreneurship. More than 46% of Fortune 500 companies were founded by immigrants or their children, generating USD 8.6 trillion in revenue (AIC Special Report, 2025). Silicon Valley and other innovation hubs are proof of how migration has powered business creation and market dynamism. However, new requirements — such as the USD 100,000 deposit for H1B visa applicants — are reshaping access for highly qualified foreign professionals seeking entry into the U.S. market. — **Mike and Don.**

At the same time, migration has become a reputational fault line. Companies that employ immigrants can strengthen diversity and resilience. However, they also risk criticism from groups that perceive mobility as a threat to jobs or cultural identity. Conversely, firms that distance themselves from migrant labor may gain short-term political favor but expose themselves to accusations of discrimination or detachment from economic and demographic realities. In this polarized environment, adapting narratives, managing tensions, and protecting the social license to operate have become strategic imperatives.

Europe and Spain: security versus growth.

In Europe, mobility is shaped by a structural tension: the securitization of borders versus the need to attract labor and talent in the face of an aging population and persistent workforce shortages. The EU Migration and Asylum Pact, set to take effect in 2026, reinforces biometric controls and accelerates repatriations, leading to a 30% increase in deportations in 2024 compared to the previous year (Eurostat, 2025)[10]. However, the pact has been criticized for perpetuating a “solidarity à la carte” model that places disproportionate responsibility on frontline countries — Spain, Italy, and Greece — while others take on more limited commitments. The result: heightened migrant vulnerability and growing internal friction within the bloc. — **Manuela Sánchez.**

At the same time, selective openness policies are taking shape. The CEDEFOP Labour Shortages Index identifies critical gaps in healthcare, caregiving, information technology, and construction, areas where failure to act could erode competitiveness (CEDEFOP, 2024)[11]. Spain illustrates this reality vividly: immigration has accounted for 80% of economic growth over the past 15 years (El País, Maqueda, 2025)[12]. In 2024 alone, of the 515,000 new jobs created, 211,000 (41%) were filled by foreign workers, who represent just 13.6% of total employment but sustain key industries such as hospitality, care, and construction (BBVA Research, 2024)[13]. The Bank of Spain and the IMF both note that this trend explains much of the country’s robust 3.2% GDP growth in 2024, above the European average (BdE, 2024)[14]. Even Italy, despite enforcing strict policies toward irregular migrants and asylum seekers, has launched plans to admit 500,000 temporary legal workers.

The European Commission has also promoted “academic asylum” programs for researchers and students (EC, 2025)[15]. Spain, in particular, has become a magnet for Latin American talent, which now represents 28% of its foreign university population (Ministry of Universities, 2024)[16]. ““Faced with demographic aging, skilled immigration plays a crucial role in maintaining competitiveness. The decline of the working-age population could slow or even stabilize if underrepresented groups such as women, older adults, and young people with limited qualifications had greater access to employment. But without migration, that balance simply isn’t sustainable” (Biagi et al., 2025; Ueffing et al., 2025)[17].

In this way, each arrival in Europe triggers far-reaching shifts, innovation ecosystems evolve, consumer bases diversify, and social policies adjust in response. For companies, the challenge is to navigate polarized narratives. Yet within that tension lies an opportunity: to become allies in cultural integration and champions of a more diverse, sustainable, and competitive model. — **Juan Pablo Santangelo.**

Latin America: transit, return, and resilience.

In Latin America, human mobility is multidirectional. Origin, transit, destination, and return coexist within the same geography. In 2023, the region recorded 47 million new displacements, bringing the total number of people in situations of internal displacement to 75.9 million (IDMC, 2024)[18].

Colombia

Colombia is experiencing one of the most intense chapters of human mobility in the region. According to the UN, around 6% of the population consists of migrants from diverse origins (IOM, 2024)[19]. In just five years, more than 2.8 million Venezuelans have arrived in the country, forming the largest migration wave in recent history (Cortés, IOM, 2024)[20]. This influx has strained institutional capacities in healthcare, education, and housing, yet it has also had a tangible economic impact. The country's primary challenge now is to integrate, create opportunities, and harness this human movement as a driving force for its future.

Mobility is also reshaping social and urban landscapes. Medium-sized border cities have become spaces of integration and resilience, where the pressures of informal labor coexist with the rise of new enterprises and cultural ventures that revitalize communities.

Although a significant portion of the migrant population remains in informal employment, the labor market is showing signs of a gradual transition, with increasing participation in sectors such as agribusiness, logistics, construction, and services. For Colombia, the challenge is to recognize migration as a historic opportunity to redesign its social, labor, and reputational fabric, transforming it into a source of innovation and legitimacy. — **María C. Gnecco**

In Spain, immigration has accounted for 80% of economic growth over the past 15 years.

Mexico

In May 2025, remittances to Mexico fell by 4.6% compared to the same month the previous year (Bank of Mexico, 2025)[21]. Furthermore, starting in 2026, they will be subject to a 1% tax. This measure will directly affect regions where remittances represent more than 10% of GDP. At the same time, the country continues to consolidate its role as a transit corridor to the United States, driving growth in industries such as transportation, private security, and humanitarian services.

Human mobility in Mexico is undergoing a period of redefinition, reshaping both public policy and regulatory frameworks. While the Trump administration in the U.S. reinstated restrictive measures such as “Remain in Mexico,” the Claudia Sheinbaum government adopted a human-centered approach through its “Mexico Te Abraza” (Mexico Embraces You) strategy, aimed at assisting returnees and strengthening the consular network. Among its results, the policy led to a 91% reduction in migrant encounters at the northern border between October 2024 and August 2025 — a structural shift in flow management.

At the same time, legal reforms are being debated to address emerging tensions, including potential amendments to the Migration Law and the General Population Law, which would introduce provisions to revoke residency for foreigners involved in acts of discrimination or abuse. Mexico is also preparing the first major visa policy overhaul in over a decade, with the aim of streamlining procedures and aligning migration policy with tourism development ahead of the 2026 FIFA World Cup.

Still, competitiveness challenges persist. In 2024, more than 100,000 foreign visitors, mainly from Colombia and Brazil, were denied entry at Mexican airports, triggering diplomatic tensions and damaging the country's reputation as a destination for tourism and business. These incidents have prompted bilateral working groups and underscored the need for more transparent, reliable, and respectful migration processes.

For the private sector, mobility also opens strategic opportunities. The "Conexión Empresarial Paisano" platform, which lists around 64,000 job openings from 220 Mexican companies, shows how the reintegration of returning migrants can help fill talent gaps and strengthen corporate legitimacy. By adopting inclusive policies and responsible narratives, companies can better adapt to an evolving regulatory environment and position themselves as key players in building sustainable solutions in a country defined by constant human movement. — **Fernando García.**

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Peru

Peru has become the second-largest destination for Venezuelan migrants in the region, welcoming over 1.5 million individuals, which accounts for approximately 3% of its total population (IOM, 2024)[22]. This influx has had multiple impacts: politically, it has strained governance and institutional capacity; economically, it has created both dynamism and labor precarity; and socially, it has challenged community cohesion.

For every sol invested in assisting the migrant and refugee population, Peru received 2.6 soles in fiscal return between 2018 and 2022 (World Bank & UNHCR, 2023)[23], proof that mobility is a productive investment. This logic aligns with The Next Mindset: institutional and corporate reputation will increasingly depend on the ability to anticipate and manage narratives in contexts where public opinion oscillates between perceived threat and potential opportunity.

The sectoral impact is particularly visible in retail and gastronomy: cities such as Lima, Arequipa, and Trujillo have seen the emergence of clusters like "Little Caracas," which diversify the market and boost local economies. According to the World Bank and UNHCR, 70% of Venezuelans in Peru are of working age, and their education levels exceed those of the local population, representing a valuable yet underutilized human capital base[24]. Mobility, therefore, drives demand, expands business ecosystems, and unlocks opportunities for innovation and growth. — **Martín Díaz.**

Moreover, **climate change** is redefining mobility across the region. Between 44 and 216 million people could be displaced within their own countries for environmental reasons over the next two decades (World Bank, 2025)[25]. This will reshape urban geographies, land prices, and investment priorities in resilient infrastructure — redrawing not just maps, but the social and economic foundations of entire communities.

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The Forces Of Mobility

What happens when people move? Entire markets, cities, and talent pools shift, reshaping the economy and unlocking new opportunities.

When people move, markets move.

When people move, they create new demand for goods and services. Migrant communities bring with them distinctive consumption habits, expanding niche markets and driving product diversification. Mobility directly influences how companies design and deliver their offerings — and it also reshapes the business ecosystem itself, thanks to one defining trait: people on the move tend to be more entrepreneurial. The same is true for those who return home after emigrating.

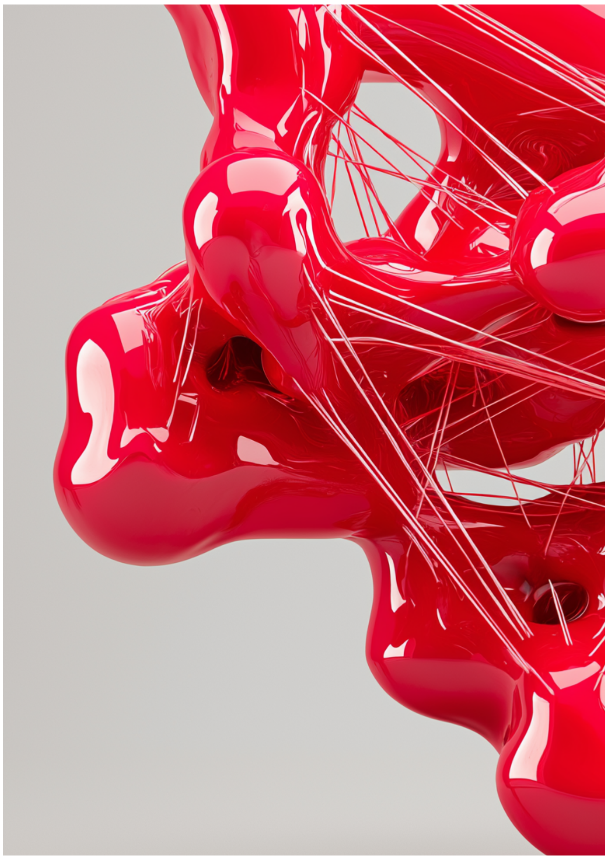
A study spanning 69 countries found that immigrants are more likely to become entrepreneurs than native-born residents. In the United States, where 13.7% of the population was born abroad, immigrants account for 20.2% of the self-employed and 25% of startup founders (Harvard Business Review, 2021).[26]

Yet migrants don't just reshape the markets of their host countries, they also transform those they leave behind.

A recent study conducted by the Center for Economic Policy Research[27] highlighted how low-skilled workers from poorer Southeast Asian countries, such as Bangladesh, often encounter significant obstacles when trying to access credit. This lack of financial support forces them to incur substantial costs in their quest to migrate to wealthier nations, with many Bangladeshis ultimately seeking opportunities on the Arabian Peninsula. Migrating is a high-risk decision. Yet once abroad, people on the move often find that work in construction or services can deliver strong returns. Many later return to Bangladesh's rural or semi-urban areas, and a significant share become self-employed or entrepreneurs. While only 30% were self-employed before migrating, that figure rises to 60% after their return. This shift is largely made possible by investing the money they earned abroad into starting a business or acquiring a taxi license.

On average, they report higher earnings than equally skilled wage workers, and they now represent a vital segment of Bangladesh's entrepreneurial ecosystem (CEPR, 2024).

Interestingly, even though 42% of European media coverage on migration still includes the word "crisis," Radar AI found a 33% uptick in references to "innovation" and "diversity" tied to economic opportunity.



When people move, talent moves.

Migration flows reshape the availability of labor in key industries, which in turn drives knowledge transfer and forces organizations to rethink how they manage human capital.

Prithwiraj Choudhury, professor of organizational behavior at the London School of Economics and named by Forbes as one of the top 50 experts on the future of work, recently published a study on how migrants and locals interact in their host communities. His work, Bounded Solidarity: The Role of Migrants in Shaping Entrepreneurial Ventures[28], explored whether immigrants compete for the same opportunities as locals — or instead bring unique perspectives that generate shared value.

The experiment compared entrepreneurial projects among three types of groups: those formed solely by locals, those mixing locals with internal migrants, and those including migrants from farther regions such as Japan, the Middle East, and Africa. The outcome was clear: when an immigrant and a local collaborate, they produce more socially driven ideas than teams composed entirely of locals. Examples included a tech startup using drones to improve school safety — born from the partnership between a tech-savvy immigrant and a teacher concerned about school violence — and a non-alcoholic bar inspired by the collaboration between a hospitality worker from abroad and a local activist worried about alcohol consumption. (Scheller College of Business, 2024). The conclusion: new talent acts as a catalyst for local talent development.

When an immigrant and a local collaborate, they produce more socially driven ideas than teams composed entirely of locals. New talent acts as a catalyst for local talent development.

> Digital discourse reinforces this paradigm shift: associations between “migrant talent” and “innovation” are on the rise, suggesting that mobility is now seen less as a brain drain and more as a knowledge transfer.

In Australia, for instance, the Energy, Mining, and Property sectors depend heavily on highly skilled immigrant labor, in some cases, accounting for two-thirds of the workforce. During periods of low immigration (such as the pandemic years), these sectors faced serious challenges attracting the talent they needed. According to a KPMG study[29], closing such gaps requires not only legal reform but also stronger diversity and inclusion policies. Many companies continue to apply discriminatory practices, even amid shortages. Job applicants with non-Anglo names were 60% less likely to receive a positive response, and nearly 25% of highly qualified migrants were employed at a skill level below their qualifications (KPMG, 2023).

When people move, cities move.

Cities that receive migrants transform rapidly. Pressure mounts on housing, transport, and public services, but new avenues for urban innovation also emerge. Migrant workers are often more willing than locals to accept the challenges of living in cities with high living costs.

Urban economist Edward Glaeser, author of The Triumph of the City, argues that "immigrants are good for cities, and cities are good for immigrants." In his seminal study Cities and Skills[30], he examined why urban wages are higher — at the time, 32% higher in the U.S. — and concluded that while cities boost productivity through proximity and coordination, the key driver of the "urban wage premium" is the accelerated skill accumulation that happens there. People in cities learn faster, become more productive, and therefore earn more — and those joining cities from rural areas or abroad play a decisive role in this cycle (Econpapers, 2001).

A more recent study, "Why Immigration is an Urban Phenomenon,"[31] by Joan Monràs (Universitat Pompeu Fabra), found that immigrants, counterintuitively, tend to settle in high-cost cities. The reason, he explained, is that many send a significant portion of their income back home. "As a result, they value the high urban wages and are less deterred by the cost of living than local workers" (Federal Reserve Bank of San Francisco, 2023).

According to Radar AI, the narrative around migration is shifting from "humanitarian crisis" to "productive mobility", with a 45% increase in mentions linking migration to "entrepreneurship" and "economic contribution."

When people move, the economy moves.

Human mobility has become a macroeconomic driver. Beyond consumption and business structure, it influences national indicators (debt, fiscal sustainability, pensions, and public services). In some countries, remittances exceed foreign direct investment.

In Europe, despite modest economic growth, the study "A Changing European Labour Market: The Role of Immigration and New Jobs"[32] by CaixaBank Research reports the creation of 7.2 million jobs between 2019 and 2024, bringing unemployment to historic lows.

Nearly half of those jobs (3.2 million) were filled by workers from outside the European Union, who represent just 6.6% of the EU labor force. According to the European Central Bank, this increase in the foreign working-age population — and their higher employment rate — has been one of the main drivers of eurozone growth in 2023 and 2025.

The increase in the foreign population of working age, along with their higher employment rate, has been one of the main drivers of economic activity growth in the euro area.

Across digital platforms, the word "migrant" is associated with "decent work" and "opportunity" in 68% of mentions, though 21% still link it to "informality" or "exclusion."

At the same time, another phenomenon has reshaped Europe's labor markets: while foreign workers remain overqualified for the jobs they often perform, that gap has narrowed in recent years, allowing for higher participation in value-added sectors (CaixaBank, 2025).

In the United States, shifts in migration policy enabled the Dallas Federal Reserve to conduct a comparative study. It found that "illegal immigration rose sharply between 2021 and 2024, but has since fallen abruptly, producing negative effects on economic growth. Historical data and vector autoregression models suggest that GDP growth in 2025 is between 0.75% and 1% lower than baseline projections." The study also found that higher levels of unauthorized migration not only boost GDP but have little effect on inflation (Federal Reserve Bank of Dallas, 2025).[33]

Industries In Motion

Financial services and banking.

In countries like Mexico and Colombia, remittances already surpass foreign investment, opening space for innovative financial products: multi-currency accounts, migrant loans, international health and travel insurance, and fintech solutions designed for diasporas. The opportunity lies in alliances between traditional banks and digital platforms that lower transfer costs while building trust within migrant communities.

Direct opportunities: fintech, retail banking, insurance, diaspora-linked social investment.

Between 2023 and 2025, positive online mentions of “digital remittances” and “banking for migrants” rose 48%. The dominant narrative associates fintech with “autonomy” and “access,” while traditional banks remain linked to “bureaucracy” and “high fees.”

Agribusiness, exports, and imports.

Migrants replicate and expand their food consumption patterns, creating new niches for import/export markets — from the growth of Venezuelan restaurants in Colombia to the spread of Mexican products in the U.S. Meanwhile, labor shortages in U.S. and European agriculture are accelerating automation but also creating space for regulated migration programs.

Direct opportunities: food retail, agritech, logistics, international food trade.

Regional conversations about products tied to migrant communities grew 35% since 2024, peaking around words like “flavor,” “roots,” and “authenticity.” Over 60% of mentions of migrant-origin food products were linked to cultural identity.

Tourism and business travel.

Stricter U.S. migration policies have hit traditional tourism, but they've also opened opportunities for alternative destinations in Latin America and Europe positioning themselves as inclusive hubs. Diaspora tourism is on the rise — travelers visiting family or heritage communities — driving demand in airlines, hotels, and digital platforms. Academic and medical tourism are also expanding, as people move for education and healthcare.

Direct opportunities: airlines, hospitality, travel insurance, medical and academic tourism.

Between 2023 and 2025, mentions of "traveling to reconnect" or "roots tourism" grew 41%. Positive sentiment toward medical and educational tourism outpaced leisure tourism by 28%.

Global education.

Tighter visa policies in the U.S. have created space for universities in Europe and Latin America, especially in Spain and Mexico, to attract international students. Hybrid and online learning models are expanding, allowing institutions to reach students unable to migrate physically.

Direct opportunities: higher education, edtech, language learning, student insurance.

Spain and Mexico lead Spanish-language online conversations about academic mobility. Among messages with positive sentiment, 67% refer to "access" and "personal transformation," while 23% mention "bureaucracy" or "migration barriers" as obstacles.

Health and care.

Mass migration strains public health systems but opens space for private clinics, international insurers, and telemedicine platforms serving migrant communities. In the U.S., agriculture and construction depend heavily on migrant labor — just as the healthcare sector increasingly relies on migrants, especially in long-term care and rural or underserved areas. In Spain, migrant workers sustain a large share of the care and healthcare system. — **Bridget Haeg.**

Direct opportunities: private healthcare, telemedicine, health insurance, caregiver job platforms.

Across Europe and Latin America, mentions of "telemedicine" linked to migration rose 62%, suggesting that healthcare is becoming a vector of trust and integration.

Human talent and work.

Migration fuels diversity and talent — with highly skilled profiles boosting innovation and startups. Labor shortages persist in agriculture, construction, and care, creating opportunities for circular hiring models (temporary programs) and digital job-matching solutions.

Career paths are no longer linear — they're migratory. People move across countries, sectors, and cultures, bringing diversity and the uncertainty of the transient. Over 45 million Latin Americans live outside their home countries, and around 5 million move within the region each year (UN). In markets like Colombia, Chile, and Mexico, these communities are transforming labor markets and reshaping corporate culture. Data shows that diverse teams outperform less diverse ones by up to 36% (McKinsey, 2020). The key is to stop viewing retention as permanence — and start seeing it as maximizing value while the talent stays.
— **María C. Géneco**

Direct opportunities: HR consulting, digital recruitment, technical education, business innovation.

The words most associated with "diverse teams" are "creativity," "performance," and "learning." Negative mentions cluster around "instability" and "precarity." Corporate messages emphasizing "intercultural learning" receive 3.5 times more positive engagement.

Cities, urban planning, and construction.

Migration puts pressure on basic services but also revitalizes real estate markets, from rental housing to modular construction and social housing. Climate migration is forcing cities to design resilient infrastructure and new models of sustainable urban planning.

In Spain, the construction sector faces acute labor shortages. According to the EBAE Survey, 56% of construction companies report difficulties finding suitable workers — one of the highest rates across all sectors, surpassed only by hospitality (60%) and agriculture (57%). Migration acts as a balancing factor, partially offsetting the talent gap.

Direct opportunities: construction, real estate, public transport, smart cities.

Urban migration discourse has shifted from "service pressure" (2023 trend) to "local revitalization" (2025 trend). Positive mentions of "multicultural neighborhoods" grew 49%, while those linking "migration" to "housing crisis" fell 15%.

Climate change and resilience.

Climate displacement — an estimated 44 to 216 million people over the next two decades — will drive demand across insurance, renewable energy, water management, and urban planning. Companies that anticipate these movements will be best positioned as allies of climate resilience.

Direct opportunities: insurance, renewable energy, sustainability consulting, urban development.

Mentions of "climate refugees" have risen 56% since 2023, with higher concentrations in South America and Africa. Links between "human mobility" and "resilience" grew 27%, reflecting a narrative that increasingly connects displacement and sustainability.

Culture, entertainment, and media.

Cultural diversity is powering new creative industries — from gastronomy and music to fashion and film — and expanding global consumption markets. Entertainment is thriving on diaspora narratives, creating opportunities for transnational content in cinema, streaming, and advertising. Beyond sectoral innovation, integration itself is emerging as a global challenge and a frontier of growth. Tech companies and social networks are beginning to test inclusive, diversity-driven business models, proving that integration is not just an ethical imperative, but a field of innovation. — **Manuela Sánchez**

Direct opportunities: cultural industries, media, inclusive marketing, digital platforms.

In the media ecosystem, mentions of "diaspora narratives" have grown 47%, especially in audiovisual and fashion content. Productions featuring migrant characters or intercultural themes achieve 1.8× higher engagement on social media.

Trade and global value chains.

Migration connects territories and opens new import-export routes led by transnational communities. Diasporas act as cultural and commercial bridges, creating opportunities for brands seeking expansion.

Direct opportunities: foreign trade, logistics, transnational e-commerce.

Narratives vary across countries: in Mexico, the focus is on "return and belonging"; in Peru, on "economic integration"; and in Colombia, on "social resilience." These differences reflect how political and media contexts shape regional discourse.

Data and innovation.

Every migration flow generates massive datasets on mobility, consumption, integration, and risk. Organizations capable of analyzing and anticipating migration trends through big data and AI will develop predictive tools for governments, banks, universities, and insurers.

Direct opportunities: data analytics, artificial intelligence, strategic consulting, predictive marketing.

Organizations that implement inclusive narrative strategies reduce negative brand mentions by 32%. The takeaway: anticipating and managing narratives can be as critical as designing policies.

The shortage of professionals could be partially addressed through the arrival of migrants.

Stories In Motion

Retail and gastronomy in Peru: migration as a catalyst for growth.

Context: a structural phenomenon turned opportunity.

Since 2016, Peru has become the second-largest host country for Venezuelan migrants in Latin America, with over 1.5 million arrivals or about 3% of the national population (IOM, 2024)[34]. What was initially seen as pressure on public services has evolved into an economic and cultural transformation. In cities such as Lima, Arequipa, and Trujillo, the influx of migrants has fueled a wave of gastronomic ventures, local stores, and urban services that have redefined commercial dynamics. Gastronomy — a symbol of Peruvian national identity — has also become a bridge for economic and social integration.

The challenge: between dynamism and informality.

The first stage of migration generated visible tensions. The surge of people intensified pressure on the informal labor market, and many migrants turned to self-employment in retail and food services as a means of survival. Both the state and the private sector lacked integrated strategies to channel this economic potential.

Key challenges included:

- Perceived competition with local businesses, without institutional support.
- Uneven sanitary and tax regulation for new ventures.
- Limited access to credit due to the absence of financial histories.

Despite these barriers, urban innovation clusters began to emerge, driven by real demand, quality offerings, and a growing customer base.

The strategy: adaptation, diversity, and synergy.

Faced with this reality, companies, associations, and local governments adopted economic integration strategies built on three pillars:

- **Commercial adaptation:** Supermarket chains and convenience stores began incorporating Venezuelan products such as harina PAN, condiments, and traditional snacks, responding both to migrant demand and to local consumers' curiosity (IOM Peru, 2023. Socioeconomic Integration Report).

- **Gastronomic diversification:** Culinary clusters like La Pequeña Caracas in Lima emerged, where Venezuelan and Peruvian entrepreneurs blended techniques, formats, and flavors. Migrant cuisine became a cultural brand with strong symbolic and economic value.

- **Institutional alliances:** Programs supported by UNHCR, the World Bank, and local municipalities — such as PEIREM (Innovative Entrepreneurship Program for Refugees and Migrants) and Vives Emprendes — promoted business formalization, access to microcredits, and technical training, integrating mobility into the formal economy.

Results: mobility as a productive force.

The outcomes speak for themselves:

- 2.6 soles in fiscal return for every sol invested in migrant assistance (World Bank & UNHCR, 2024).

- 14% growth in urban informal employment linked to migrant-led businesses, followed by a steady trend toward formalization.

- 22% increase in sales of Venezuelan products and 18% rise in fusion restaurants.

- Revitalization of previously stagnant urban areas — such as Barrio Chamo in San Juan de Lurigancho or commercial corridors in Los Olivos and Surco — now home to vibrant markets, minimarkets, and restaurants frequented by both diasporas and local consumers.

These results illustrate how human mobility can become a driver of inclusive development, provided there's a receptive ecosystem that translates diversity into innovation.

Peru has become the second-largest host country for Venezuelan migrants in Latin America, with over 1.5 million arrivalsal 3 % de la población nacional.

Lessons learned.

Peru's retail and culinary transformation offers several key insights:

- **Mobility is an economic asset:** When migrants gain access to financial, educational, and regulatory tools, both fiscal and social returns are positive.
- **Diversity drives commercial innovation:** Companies that recognize and adapt to new cultural consumption patterns stand out in saturated markets.
- **Integration requires shared governance:** Public policies, banks, business associations, and international organizations must act together to turn mobility into productive inclusion.
- **Reputation grows from empathy:** Brands that champion coexistence and diversity earn legitimacy in polarized societies.

Financial innovation driven by diasporas in Mexico.

Context: a country powered by cross-border flows.

Mexico is the second-largest recipient of remittances in the world, behind India. In 2024, remittances represented over 4% of GDP, surpassing foreign direct investment (Bank of Mexico, 2025)[35]. More than 40 million Mexicans and their descendants live abroad, mostly in the United States, sending roughly USD 61 billion annually to their families.

Historically, this economic flow was dominated by traditional banks and exchange houses, characterized by high transfer costs and limited financial inclusion in rural communities. Over the last decade, however, Mexican diasporas — increasingly connected and digital — have sparked a structural transformation around a key question: How can money transfers evolve from mere transactions into platforms for financial development? This shift created fertile ground for fintech innovation, turning remittances into a lever for inclusion and national competitiveness.

The challenge: inefficiency, exclusion, and lack of trust.

Until recently, sending remittances from the U.S. to Mexico cost 6–8% per transaction, involved long delivery times, and relied on physical intermediaries (World Bank, Remittance Prices Worldwide, 2024)[36]. In rural areas, only 49% of adults had access to a bank account (INEGI, 2024).[37]

In 2024, Mexican remittances represented over 4% of GDP, surpassing foreign direct investment.

Migrants faced regulatory barriers and widespread distrust toward formal banking systems, which sustained a large informal transfer market. Meanwhile, banks lacked products tailored to migrant needs. The challenge was threefold: technological, cultural, and relational: bridging the digital migrant and the offline household through a shared financial ecosystem.

The strategy: digitalizing the diaspora.

Starting in 2020, a new generation of Mexican startups — including Bitso, Cuenca, and Finvero — redefined the remittance market with digital, user-centered solutions.

Their strategy was built on three pillars:

- **Technology and cost efficiency:** Leveraging blockchain and stablecoins, they reduced average transfer fees to under 2% and enabled instant cross-currency transactions.
- **Trust and transparency:** Real-time tracking, personalized support, and financial education programs boosted users' confidence in formal banking.
- **Inclusion and diversification:** New products emerged — microloans for recipient families, life insurance tied to remittances, automated savings, and peso/dollar investment options.

This model attracted both migrant users and traditional financial institutions seeking partnerships. In 2024, Bitso surpassed six million users across Mexico and Latin America, becoming a regional benchmark.

What used to be an expensive and exclusionary system is now a financial revolution that is redefining how migrants and families survive and thrive.

Results: a new financial inclusion ecosystem.

The impact was swift and far-reaching:

- By 2024, over 30% of remittances to Mexico were sent via digital channels — up from 8% in 2019 (Bank of Mexico, 2025).[38]
- Mexican fintechs raised USD 865 million in 2024, accounting for 74% of all venture capital investment that year (Fintech Radar Mexico, 2025).[39]
- The share of adults with a savings product rose from 47.1% in 2018 to 63% in 2024 (National Financial Inclusion Survey, 2024).[40]
- Public-private partnerships expanded access to credit and training for returning migrants, through programs such as the Economic and Social Reintegration Law for Returning Migrants (Law No. 30001) and the 3x1 Program for Migrants, which offers technical support and financing for migrant-linked businesses.

Beyond the figures, the reputational impact was clear: Mexico began to emerge as a laboratory of financial inclusion, where migration and innovation converge to generate prosperity and local development.

Lessons learned.

- **Human mobility drives innovation when transformed into data.** Analyzing patterns of remittance flow — destination, frequency, and purpose — has allowed fintech companies to anticipate user needs and design personalized financial solutions.
- **Trust and adaptability are the new financial assets.** In contexts marked by institutional mistrust, platforms that communicate transparency and social purpose gain legitimacy faster than traditional financial institutions.
- **Migrant talent is a strategic resource.** Many founders and employees of these startups are migrants or returnees who deeply understand the end-user experience.
- **Inclusion is profitable.** Far from being a social niche, the migrant base has become a mass market that strengthens the country's macroeconomic stability.

International education in Spain: attracting Latin American talent.

Context

Over the past decade, Spain has become one of the world's leading destinations for international students — thanks to its language, cultural affinity with Latin America, and competitive academic offer. In the 2022–2023 academic year, approximately 241,777 foreign students were enrolled in Spanish universities.

According to the Economic Impact of International Students in Spain[41] (2023) report, Latin American countries represent a significant share of Spain's international student population: Ecuador (7.08%), Mexico (4.11%), Peru (3.89%), and Chile (2.72%) rank among the top countries of origin. This student flow generated an estimated €6.3 billion in economic impact, consolidating Spain as one of the most important educational destinations for the region.

In 2023, Latin American students generated an economic impact of 6.3 billion euros in Spain.

The challenge.

For Spanish universities, attracting Latin American talent meant overcoming several hurdles:

- Competing with the U.K., the U.S., and other European countries that traditionally dominate international mobility.
- Adapting orientation, visa, and employment services to the academic, economic, and cultural diversity of Latin American students.
- Turning international students into drivers of innovation, institutional internationalization, and transnational influence networks — not merely sources of revenue.

The strategy

To address these challenges, Spanish universities and public authorities rolled out a series of targeted actions:

- **Scholarship programs and bilateral agreements:** Universities and the government expanded financial aid for Latin American students, encouraging academic mobility and international cooperation.
- **Cultural adaptation and student support services:** Dedicated international student centers, mentorship programs, bilingual tutoring, and campus integration initiatives with a strong Latin American presence improved retention and inclusion.
- **International marketing and institutional positioning:** universities increased their visibility across Latin America through education fairs, partnerships, and hybrid programs that allow students to start studies online in their home country and later transition to in-person learning in Spain.
- **Employment pathways and alumni networks:** Many institutions linked academic programs with research, entrepreneurship, internships, and career opportunities tailored to the global Latin American community.

Results.

- The number of international students reached a record 241,777 in 2022–2023.
- The economic impact exceeded €6.3 billion, confirming that internationalization creates value well beyond tuition fees.
- Latin America's growing share of enrollments shows that Spain is successfully attracting high-potential talent from the region.
- Universities implementing this strategy have enhanced their global reputation, expanded their Latin American alumni networks, and strengthened research and collaboration ties.

Key takeaways.

- **Academic mobility is a strategic investment, not just an educational flow.** Attracting Latin American students brings income, diversifies campus cultures, internationalizes institutions, and builds long-term global influence networks.
- **Cultural adaptation drives retention.** Beyond admissions, ensuring a positive student experience through mentoring, support, and integration programs determines satisfaction, completion rates, and institutional loyalty.
- **Latin American talent connects markets.** These students don't just study in Spain — they project brands, startups, and collaborations that link Spain with their home countries, fostering enduring transnational relationships.
- **Geographic and demographic diversification strengthen institutional resilience.** Focusing on Latin America reduces dependence on traditional markets and provides agility amid geopolitical or economic turbulence elsewhere.

Spain attracts Latin American talent by combining student support and internationalization with high academic and economic impact.

The Future of Human Mobility: AI radar

Context and scope.

From our Deep Learning team, we developed AI Radar, a pioneering study that analyzes how narratives around migration and human mobility are built and perceived. Adding this layer of insight (whose findings appear throughout this report) stems from our conviction that artificial intelligence is now an essential tool for interpreting the global digital conversation and identifying where consensus and divergence emerge around topics as sensitive as migration.

As mentioned in the introduction, AI Radar combines ethical rigor with strategic vision, leveraging the potential of artificial intelligence to broaden understanding and detect bias, while recognizing that automated systems can also reproduce it. To ensure a representative and nuanced reading of regional perceptions, the study relied on a careful selection of sources, languages, and cultural contexts.

The analysis used four state-of-the-art AI models. Together, they reached 69.2% alignment in their assessments of migration's economic impact — a remarkably high level of consensus for a topic that is often polarized. The study examined 1,440 responses generated by GPT-4o, Claude Sonnet 4, Gemini 2.0 Flash, and Perplexity Sonar across 12 countries in the Americas and Europe, mapping how these technologies construct and communicate narratives around migration and the economy.

Each model answered 30 questions per country, producing 120 responses per nation, which were analyzed across six key dimensions:

- Narrative frameworks, identifying 12 categories ranging from Economic-Labor to Security.
- Economic sectors are most often mentioned as affected.
- Predominant tone, classified as balanced, critical, highly positive, or mixed.
- Perceived intensity of impact, on a 0–10 scale.
- Quality of evidence, based on the presence of quantitative data and cited studies.
- Level of consensus among the four models.

Key findings.

- Economic focus: The models frame their responses predominantly through Economic-Labor (99%) and Productivity-Competitiveness (57%) lenses, while social, cultural, and security dimensions account for less than 7% of narratives.
- Innovation leads: The Technology and Innovation sector drives the most positive mentions (41%), with an average intensity of 7.2/10 and consistent presence across all 12 countries.
- Agriculture appears in 23% of responses and records the highest average intensity (7.8/10), with models identifying a critical dependency on migrant labor in specific crops.
- Labor Market and Public Sector concentrate the most critical narratives (17% and 14%, respectively), highlighted as areas of tension or challenge.
- Only 51% of responses include quantitative data and just 29% cite specific studies, revealing that AIs tend to construct narratives from general patterns rather than rigorous empirical evidence.
- The Demographic framework appears in 38% of responses with a balanced tone, while Innovation-Entrepreneurship (36%) and Cultural (6%) frameworks show consistently positive sentiment.

Geographic patterns.

Portugal leads with the most positive narrative (71.7% positive tone), followed by Spain (67.5%) and the United States (67.5%). In contrast, the Dominican Republic shows the most critical tone (50% positive), followed by Colombia (49.2%) and Ecuador (47.5%). Overall, European countries and the U.S. receive more favorable assessments than Latin American nations that serve as destinations for South–South migration.

Sectors identified as beneficiaries.

Technology and Innovation dominate positive narratives (41% of mentions; intensity 7.2/10), with models emphasizing roles in software development, data analysis, and startups. Agriculture follows (23%; intensity 7.8/10), where AIs highlight structural reliance on migrant labor for seasonal or high-demand crops. These positive impacts are attributed to skill complementarity, demographic renewal of the workforce, and transnational knowledge transfer. The Innovation-Entrepreneurship framework appears in 36% of responses with a highly positive tone, underscoring business creation and economic dynamism.

Sectors under pressure.

Labor Market narratives are the most critical (17% of mentions), where models note competition for low-skilled jobs and wage pressure in specific sectors. The Public Sector follows (14%), with AIs identifying strains in education and healthcare services in high-migration areas. Key barriers include informality, skills mismatch, and limited institutional capacity to manage rapid migratory flows.

Consensus among models.

The four models reached a 69.2% consensus — notable given the topic's complexity and sensitivity. This convergence suggests that AIs share similar training sources and narrative patterns around migration and the economy. The most significant divergences appear not in core frameworks but in quantitative estimates and the weight assigned to positive versus challenging impacts.

Reliability of AI insights.

Only about half of the responses include quantitative data, and fewer than one-third cite verifiable sources. While AIs tend to offer strong conceptual frameworks, they often lack empirical support — raising concerns about traceability and reliability for decision-making contexts.

Key implications.

- AIs reproduce a systematic bias toward economic-labor narratives (99%), sidelining social, cultural, and security dimensions that are central to real-world migration debates.
- A consistent geographic bias emerges: European countries and the U.S. are portrayed more favorably than Latin American counterparts, hinting at possible dataset or literature biases.
- The low citation rate (29%) shows these technologies function more as synthesizers of general consensus than as tools of rigorous research — underlining the need for expert human verification.
- Decision-makers should note that AI-generated migration narratives emphasize aggregate economic impacts over the distribution of costs and benefits, systematically overlooking equity and social cohesion analysis.

You can access the full AI Radar report at the following link.

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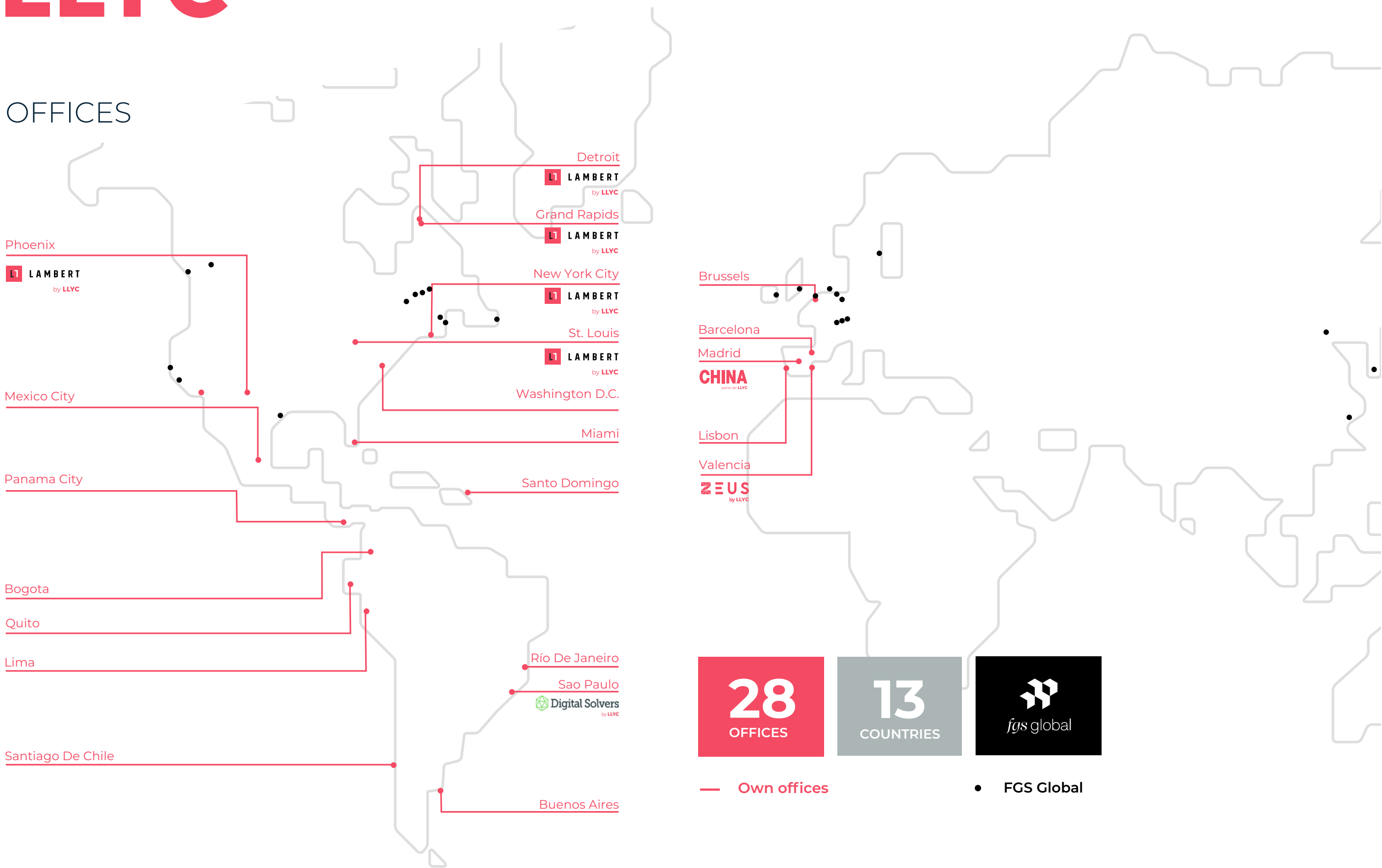

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LLYC Team
professionals

93,1 M€
Operating income
2024

LLYC is among the
40 LARGEST ORGANIZATIONS
within the industry worldwide
according to PRWeek and
PRovoke rankings

BEST CONSULTING AGENCY
in Europa 2024,
PRWeek Global Awards.

CONSULTING AGENCY OF THE YEAR
in Latin America 2023,
PRovoke.

LLYC is your partner in creativity, influence and innovation.
We aim to transform each day into an opportunity to nurture your brand. We believe boldness is the key to achieving it.

MARKETING + CORPORATE AFFAIRS

PARTNERS FOR WHAT'S **NEXT**

LLORENTE Y CUENCA