US and canada domestic mobility survey 2025

elevating employee experience: navigating an employee-centric era

FULL REPORT

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A huge shoutout to all our respondents for their time and invaluable contributions. Your insights create the heart and soul of this report, and we can't thank you enough.

welcome to the US and canada domestic mobility survey 2025, your go-to guide for the latest trends in domestic relocation

Tap into the collective wisdom of 106 industry insiders as they share insights and predictions about mobility volume, flexible relo strategies, cost management, remote work, internships, DEI initiatives, sustainability, and more—all focused on intra-country moves within the United States and Canada.

Why it matters: Whether you're looking to supercharge your relocation policies, boost employee satisfaction, or simply stay ahead of the mobility curve, this survey is your playbook for the year ahead.

Now get ready to elevate your mobility programs to new heights. In this employee-centric era, it's all about making the journey as incredible as the destination.

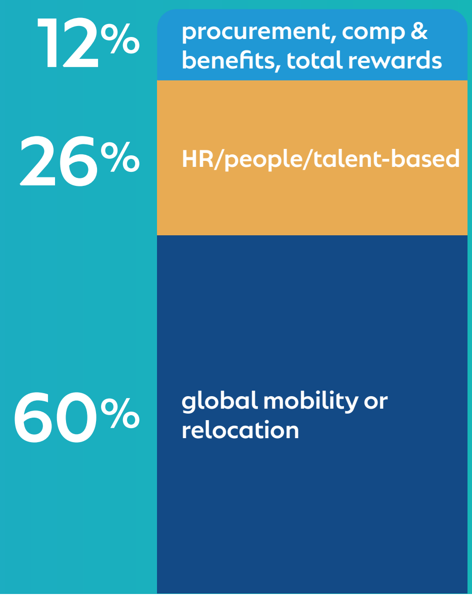
"At Cartus, we know staying ahead of the curve is crucial for mobility and human resources professionals. Our 2025 US and Canada Domestic Mobility Survey is packed with actionable insights that are already helping our clients craft smarter strategies for the year ahead. By sourcing valuable data and pairing it with our deep relocation expertise, we aim to help companies enhance their policies, improve employee satisfaction, and achieve a higher return on investment in their domestic US and Canadian programs."

– Matt Tebbe, President and CEO, Cartus

who?

respondent profile

- 60% of our survey respondents work in global mobility or relocation, 26% are in HR/People/Talent roles, and 12% are in procurement, compensation & benefits, or total rewards.
- 41% report having two to three employees managing relocation, 25% have just one, and 23% have five or more.
- Industries represented in the survey include construction, consumer services, extraction (oil, gas, and mining), finance, manufacturing, media, retail, tech, and transportation.
- Just over half (51%) managed less than 100 relocating employees in the last 12 months versus 49% moving more than 100 per year.
- More than half (54%) relocate employees within both the United States and Canada, while 37% do so within the United States exclusively.



in-house teams vs. program size

The survey data offers fascinating insights between the size of an in-house HR and mobility team and the size of the relocation programs they manage. Here's what we found:

- For those teams with a lone HR or mobility professional, a whopping 81% of US domestic programs and 100% of Canadian domestic programs managed fewer than 100 relocations. No surprise—a single person can only handle so much!
- When we look at teams with two to three in-house professionals, the landscape starts to shift. About 55% of these teams with US moves and 89% with Canadian relocations still manage fewer than 100 moves. However, 18% also manage volume between 501 and 1,000. That's quite a leap, indicating that just a couple more people can really boost capacity and resources.
- For larger teams of five or more employees, 35% of US domestic programs and 78% of Canadian programs still manage fewer than 100 relocating employees. Here's the kicker: 26% of US programs with these larger teams handled over 1,000 relocations last year compared to just 6% in Canada. Clearly, larger teams in the United States are more likely to take on more extensive relocation programs.

The bottom line: These trends paint a clear (and unsurprising) picture: the more team members you have—even one or two extras—the more scalable your relocation program becomes.

[My team has] one global mobility manager who has responsibility of all corporates touching domestic and international relocations and immigration."

– survey respondent

"[My team consists of] the head of global mobility, global mobility business partners, global mobility operational directors, global mobility advisors, global mobility immigration advisors, and global mobility coordinators."

– survey respondent

mobility activity

Nearly three-quarters of respondents (71%) indicated that their overall domestic mobility activity either increased or remained the same over the past two years.

top 3 reasons

for mobility activity increasing

1. company growth (77%)
2. expansion into different markets (58%)
3. talent not available locally (50%)

for mobility activity decreasing

1. cost containment strategy (52%)
2. reducing volume in different markets (36%)
3. hybrid solutions (e.g., remote work) (32%)

mobility volume

US domestic programs

Less than 100 moves	54%
100-500	19%
501-1,000	17%
1,000+	10%

canada domestic programs

Less than 100 moves	90%
100-500	6%
501-1,000	3%
1,000+	1%

domestic mobility priorities vs. challenges

key domestic mobility priorities

1. improving the employee experience (50%)
2. improving in-house mobility processes and optimization (43%)
3. achieving a more flexible approach to mobility (e.g., core/flex, tiered policy) (42%)

key domestic mobility challenges

1. rising mobility costs (51%)
2. meeting relocating employee expectations (e.g., accommodating personal or unique requests) (33%)
3. achieving a more flexible approach to mobility (32%)

Interestingly, when we compare the domestic priorities and challenges with the findings from our **Global Talent Mobility Survey 2024**, a similar narrative emerges.

Zoom out: From the global perspective, the top priorities for 2024 track closely to the key domestic priorities: improve in-house mobility processes and optimization (50%), improve the employee experience (45%), and achieve a more flexible approach to mobility (36%).

- This alignment underscores the widespread recognition that a streamlined, flexible mobility process significantly enhances employee satisfaction.

Whether relocating within the United States and Canada or across borders around the globe, companies are clearly committed to refining their internal processes and policies to better support their employees.

The top challenges tell a similar story.

- Globally in 2024, the challenges included: rising mobility costs (45%), meeting relocating employee expectations (35%), and achieving a more flexible approach to mobility, alongside tax / compliance issues (both 29%).

The big picture: What stands out is the persistent issue of rising mobility costs, a universal challenge that translates across borders and time, affecting both global and domestic relocation programs. Companies are striving to balance these costs while still enhancing the employee experience—an essential yet delicate objective to achieve.

Additionally, the emphasis on meeting employee expectations and achieving flexibility reflects a broader trend toward personalization and adaptability in mobility programs. This evolution is crucial as it aligns with the shifting dynamics of the workforce, where employees value tailored support more than ever.

achieving return on investment (ROI)

Although not making the top three challenges for 2025, "calculating ROI" was listed by more than a fifth (22%) of respondents as a hurdle for this year.

Why it matters: Assessing a return on investment from an assignment has long been a struggle for many companies. Regardless of whether a business chooses to outsource or to manage its relocation program in-house, demonstrating a return on investment from a relocation program is about more than saving money. It's about achieving overall success in a number of key areas—namely, talent attraction, employee efficiency, and employee satisfaction.

resistance to relocation

With employee experience continuing to be an area of focus for many organizations managing mobility programs, it is worth reviewing the reasons employees turn down relocation offers:

1. family or personal circumstances (86%)
2. housing market challenges (57%)
3. spouse/partner employment issues (53%)
4. compensation and benefits issues (46%)

Between the lines: The first and third reasons (family/personal circumstances and spouse/partner employment issues) may be related and could present an opportunity for companies to review how their benefits are presented to employees.

- Do policies demonstrate inclusivity?
- Does a flexible approach allow the employee and their family to tailor relocation benefits to meet their unique needs?

Often, spouse/partner support services are not included in a relocation benefits package, but these can be a cost-effective way to ensure a candidate accepts the relocation offer.

Go deeper: When asked about benefits provided to encourage employees to accept relocation, 34% of organizations offered none. Other responses included:

- additional temporary living (27%)
- sign-on bonuses (27%)
- spouse/partner assistance (21%)
- settling-in services (18%)

These benefits go some way to address the main reasons employees decline relocation. However, only 13% of organizations offer a mortgage subsidy benefit to support destination housing purchases, which could be more effective than temporary living or sign-on bonuses in addressing housing market challenges—especially for those relocating within the U.S.

what are spouse/partner support services?

Services may cover career coaching, acclimation services, skills assessment, résumé preparation and production, interview and salary negotiation training, and personalized labor market/community research for the relocating spouse, partner, or family. Services may be provided to individuals entering the workforce, seeking similar employment, looking for a career change, or in need of settling-in support.

relocation redefined: enhanced relocation support revealed

To better meet business needs in 2025, companies are investing in various relocation support options to attract and retain talent:

- **Adding benefits to attract key talent for relocation (24%):** Companies are recognizing the importance of sweetening the deal for potential relocations. Enhanced benefits packages can make a significant difference in persuading top talent to move.
- **Incorporating new, inclusive policy elements to better reflect changing employee needs (21%):** Companies are updating their policies to ensure they cater to the diverse needs of their workforce, making relocation a more appealing and feasible option for key talent.
- **Developmental assignments (14%):** Offering developmental assignments is a strategic move to fill critical roles and provide employees with growth opportunities that can enhance their career trajectories.
- **Employee-initiated moves (14%):** Encouraging employees to take the initiative in their relocations can lead to a more engaged and satisfied workforce. It allows individuals to pursue opportunities that align with their personal and professional goals.

These investments demonstrate a trend towards developing a more flexible, inclusive, and supportive environment for employees considering a relocation. They also align with the top domestic mobility priority for this year, "improving employee experience," and the second-highest challenge for 2025, "meeting relocating employee expectations." By addressing specific employee needs and enhancing benefits or adding flexible choices, companies can better attract and retain talent in a competitive market.

24%

of organizations are adding benefits to attract key talent for relocation

move-types

The following breakdown reveals the most common move-types offered by respondents' organizations in 2024, alongside the moves they anticipate for 2025:

moves managed in 2024

1. renter
2. standard homeowner with home sale program
3. lump sum
4. intern
5. executive tier policies

moves anticipated in 2025

1. standard homeowner with home sale program
2. renter
3. lump sum
4. executive tier policies
5. domestic temporary assignment

Why it matters: This data indicates a slight shift in priorities over the coming year, such as the increasing emphasis on supporting homeowners with home sale programs, which reflects a growing recognition of the complexities and needs associated with the real estate market.

Reality check: While lump sum policies are popular due to the flexibility they offer, they may result in lower employee satisfaction because of the challenges of managing relocation expenses independently.

- At Cartus, we suggest that if companies choose to adopt a lump sum approach, they should consider combining it with a self-managed move product to ensure a smoother transition for employees and enhance their overall experience.

Although ranked fourth in the most managed move-types last year, intern programs have dropped out of this year's top five, ranking sixth overall.

- This shift likely indicates a strategic pivot, where resources are being reallocated to areas perceived as having a more immediate impact on 2025 organizational goals.

employee-initiated moves

Two-thirds of companies do not currently offer benefits for employee-initiated moves—even though this move-type was tied for third as an area companies are investing in to better attract and retain talent (see page 7 for more).

By the numbers: Those that do support such moves are most likely to offer:

- a lump sum payment (28%)
- tax compliance support (25%)
- technology resource for services (22%)
- temporary living (19%)
- domestic settling-in services (14%)
- household goods (14%)

Zoom out: In our international survey last year, 60% of respondents anticipated employee-requested moves, compared to just 19% in US and Canada domestic mobility programs for 2025.

- This gap may reflect how global companies are adapting faster to workplace changes and employee expectations, or it could be that more people are choosing to work abroad when requesting a relocation.

While self-initiated moves and associated policies have existed for decades, the latter existed primarily to support occasional requests such as a partner's career change. They have since evolved to be more talent-driven.

The bottom line: Nowadays, companies are keen on finding cost-effective ways to support employee flexibility, personal growth, and career development, as demonstrated in the key 2025 mobility priorities and challenges (page 5). Many employees are seeking opportunities that offer more freedom and adaptability rather than being confined to a single location.

what do we mean by extended business travel (EBT), hybrid, or remote moves?

EBT: Business-initiated request for the employee to work from a different business location for a defined period (e.g., employee travels from Canada to the United States to work from their New York office for an extended time, typically 30 to 90 days).

Hybrid: Employees work partly at home and partly in the physical office (e.g., 1-2 days a week).

Remote work: Employee-initiated request to work from a location that is different from their permanent residence for a defined period (e.g., an employee based in California wants to work from Texas for two months during the summer).

Work from home: Everyone works at their place of residence.

remote, hybrid, and extended business travel moves

Remote, hybrid, and EBT moves are here to stay.

Why it matters: More than a fifth (21%) of companies currently manage EBTs, and the same percentage of respondents anticipate managing these move-types this year.

- However, this population remains a challenging aspect of the HR/mobility professional's day-to-day role.
- EBTs and remote workers were cited by 19% as a top relocation challenge for 2025.

remote workers

Currently, 39% of companies in the United States and Canada have remote workers, yet 71% of those respondents do not offer company-sponsored benefits. Those that provide benefits mainly offer medical coverage and work equipment.

By the numbers: Looking ahead, 44% of companies expect to have up to 100 remote or hybrid workers as part of their mobile employee population this year. Additionally, 32% anticipate having between 100 and 500 remote or hybrid workers.

Most respondents (63%) stated that their corporate HR team manages domestic remote work policies, followed by total rewards (17%), legal (12%), and in-house relocation departments (12%).

Zoom out: According to our 2024 global survey, 49% reported that corporate HR handles international remote work policies, while 42% indicated the Global Mobility team does.

- Only 5% of domestic respondents said their Global Mobility function manages domestic remote worker policies, highlighting a disconnect between the teams responsible for domestic and global programs.

international vs. US and canada domestic mobility programs

international remote workers* **57%**

US and canada remote workers **39%**

* Cartus Global Talent Mobility Survey 2024

Find out more about how Cartus can help support your company's EBT population.

Reality check: Effective communication among stakeholders is vital for remote work policies to be successful. Business unit leaders or line managers often manage remote workers but neglect to inform the HR/mobility team about employee locations.

- Once established, a well-structured remote work policy prevents costly exceptions and streamlines approval processes.

Even with the most comprehensive policy in place, managing remote worker populations can be an uphill battle. The challenge is amplified when in-house teams are not granted additional headcount to manage the increased workload. If responsibility is shared across multiple departments, this adds another layer of complexity.

- This is where a cutting-edge technology platform, equipped with configurable workflows, can truly make a difference—streamlining approval processes and lightening the load for everyone involved.

EBTs

Despite only 12% of respondents citing their relocation department as owning the domestic remote work policy, this team was highlighted by 22% of respondents as overseeing EBT tracking. This was followed by the business teams themselves (17%).

Most respondents (68%) expect to manage up to 100 EBTs this year, while 15% anticipate having between 101 and 500. It is worth noting that managing EBTs and remote workers can be challenging, with 21% of respondents listing these move-types as a concern for 2025.

tracking employee populations

With the recent rise of hybrid work models, EBT and remote work challenges persist—especially compliance-related ones.

- Encouragingly, more than half of companies (54%) have guidelines on how far away their employees can work from an office, which shows a level of control and oversight over remote work locations.
- Nonetheless, that means 46% of companies do not track their EBTs, despite the importance of knowing employee locations for compliance and global security.

Zoom in: For those that do track, the process is usually not very comprehensive.

- Over half (55%) rely on employees to self-report their whereabouts, which Cartus has found to be an unreliable approach.
- An additional 23% use a VPN or IP address mechanism for tracking, which is a reasonable source to use in conjunction with other information (e.g., T&E records, travel data).

Lastly, 24% of respondents mentioned they were currently seeking a tracking solution. This makes sense, as having an accurate and reliable way to track EBTs is crucial for ensuring their safety, compliance with company policies, and fiscal awareness from a tax perspective.

The bottom line: Remote or hybrid work requires flexibility without a one-size-fits-all solution. Clear communication, planning, and expertise are key to creating a strong remote work policy that meets business goals, offers flexibility, aligns stakeholders, and attracts potential candidates. **Find out more**.

Learn more about Cartus' remote work solution.

internship programs

Intern programs, ranked the fourth most popular move-type last year for clients with cross-border programs, came in sixth place in 2025 for clients with domestic US or Canadian programs: 48% compared to 41%. This delta may reflect a shift in resource allocation towards areas with a more immediate impact on domestic organizational goals.

Why it matters: The ROI of a successful internship program remains significant. A separate survey in July 2024 among Cartus clients highlighted key drivers for internships: acquiring new talent, developing current talent, and retaining talent.

- A significant portion of those surveyed (62%) are actively involved in administering domestic internship programs.
- Among these, most (88%) support summer interns, 26% cater to student interns, and 23% welcome early-career part-time interns.
- This indicates a robust commitment to nurturing young talent across various stages of their early careers.

tracking interns

Interestingly, the majority (67%) of respondents with internships track conversions to permanent roles, showing a clear focus on long-term talent acquisition. In terms of volume, 56% managed 100 or fewer interns in the last year, while only a small fraction (14%) relocated more than 500 interns, highlighting the varying scales of programs.

Companies are increasingly investing in internships, although the level of focus differs by industry. For instance, according to **Re:locate Magazine**, US tech firms emphasize intern programs more than other sectors.

The bottom line: For these companies, the strategic investment in interns is not only about skill-building but "fostering innovative thinking that can drive transformative growth," which is why "investing a bit more into the relocation program helps build move loyalty."

relocation benefits

In terms of relocation benefits, it is encouraging to see that 88% offer either a salary or a lump sum, with another third covering enroute travel and/or providing housing.

- This support undoubtedly plays a significant role in easing the transition for interns moving to new locations.

However, when it comes to in-house resources, the data reveals some gaps.

- While 64% provide onboarding company orientation and 39% focus on performance objectives and coaching, only 23% offer destination orientation.

Reality check: A mere 8% also provide business etiquette education/training, despite common anecdotal feedback from our clients that interns are not well-versed in business culture/behaviors.

Another surprising finding is that 26% of companies provide no tangible intern resources at all. This presents a significant opportunity for improvement, as providing adequate support services can greatly enhance the internship experience, ensuring interns thrive. It also has the potential to lead to higher conversion rates to permanent roles.

The other side: On a positive note, to create a cohesive intern community, collaboration among interns is strongly fostered by a remarkable 97% of respondents. This is delivered in a number of ways, including company intranet sites, websites, internal online communities, and LinkedIn groups.

lump sum and capped moves

More than a third (35%) of respondents rely on capped moves, while 65% use a lump sum-only or lump sum-plus strategy. More than half (57%) calculate lump sum-only payments by employee level (e.g., lower level, early career), with another 35% calculated by distance.

Among those offering additional benefits to the lump sum, the most common include:

- household goods (32%)
- temporary living (23%)
- settling-in support (22%)

Rewind: The use of lump sums in domestic mobility has increased significantly since the 2017 Cartus Domestic US Relocation Policy & Practices Survey, which showed only 29% using lump-sum policies. This is a whopping 36 percentage points below what we are seeing today.

How does your organization calculate lump sum-only payments for employees?

- employee level (57%)
- distance (35%)
- family size (28%)
- specific relocation services (12%)
- lump sum calculator tool (12%)
- percentage of salary (10%)

For us at Grace, the industry data on the US Domestic Mobility program is indispensable. It offers insights into industry trends and aids in making informed decisions for our US Domestic program. We are grateful to Cartus for continuously providing relevant and current industry data that enhances our program's efficiency."

– Kellee Franks, Sr. Compensation Manager, W. R. Grace & Co.

Our latest survey results reflect an exciting evolution in mobility trends. We're seeing companies prioritize employee experience and flexibility, which is truly transformative. These changes are not just about policies but about creating a supportive environment that values each individual's unique needs. It's inspiring to see how organizations are stepping up to meet these new challenges head-on. The future of mobility is bright and full of possibilities!"

– Terri Bonfiglio, Director, Global Mobility & Consulting Solutions

policy review

Just under half (49%) of the respondents are considering a review of their domestic policies in 2025. Although this is 13% lower than the number of companies responding to our **Global Talent Mobility Survey 2024**, that could be attributed to the greater complexity and more frequent need for review associated with cross-border moves.

Key drivers to review domestic policy this year:

- employee experience (79%)
- cost (73%)
- flexibility (64%)

Additionally, one-third of respondents reported managing six or more domestic policies, indicating a potential opportunity for simplification and streamlining. This may explain why "improving in-house mobility processes and optimization" has emerged as the second-highest priority for 2025.

real estate market

Our research indicates that a significant majority of companies assist their relocating employees with selling their homes.

By the numbers: Specifically, 72% of organizations provide home sale programs, with the following being the most common policy inclusions:

- buyer value option (80%)
- direct reimbursement (46%)
- appraised value buyout (40%)

What it means: This suggests guaranteed buyouts (GBO) are becoming less common in domestic relocations across the United States and Canada. The rise of the buyer value option (BVO) program may be in response to the high costs of the more traditional GBO program.

To make it easier for employees to sell their homes, organizations have adopted several effective strategies:

- marketing assistance (76%)
- mandating the use of network brokers (41%)
- providing home sale incentives (38%)

When it comes to purchasing a new home in the host location, 43% of respondents mentioned they do not and are not planning to offer specific support. However, 38% do provide home purchase assistance, and 30% offer duplicate housing to help employees navigate market changes and mitigate any reluctance toward relocation.

US buyer representations agreement

End-of-year data pointed to a strong end for 2024, particularly in the labor market. Industry organizations like the Mortgage Bankers Association (MBA) remain cautiously optimistic for 2025, noting positive home price growth, rising new home sale activity, increased mortgage volume, and improved housing supply.

Go deeper: Regarding the 2024 US buyer representations agreement, the data indicates that HR and mobility professionals overseeing US domestic relocation programs may still be in the process of adapting.

- Nearly half of those surveyed (46%) have a moderate grasp of the recent legislative changes, while 30% understand them "very well."
- Interestingly, 91% have not made any changes to their programs in response to the settlement, though ...
  - 28% are gearing up to make adjustments within the next year or two
  - And about half (49%) remain unsure

The majority (77%) are committed to keeping an eye on any changes they implement to assess their long-term impact. This proactive approach will undoubtedly help navigate the evolving landscape of domestic mobility with greater ease and foresight.

canada property market

Economists and real estate agents expect Canada's property market to remain strong in 2025 due to interest rate cuts and mortgage stress test changes, despite ongoing affordability issues. Home sale activity on Canadian MLS® Systems increased month-on-month in November 2024 (the most recent data available), with a 2.8% rise in completed sales. That is a significant 18.4% higher than May last year.

"Hard to compete with larger towns regarding activities, shopping, and quality of school district, etc."

– survey respondent

"Around the remote locations, housing options are very rare (not only temporary housing options but also permanent housing options)."

– survey respondent

location, location, location (did we mention location?)

When examining challenging relocation destinations, the data presents a tale of two cities—or, rather, a tale split between major cities and small, remote towns across the United States and Canada.

Zoom in: Respondents did not point to cities causing headaches for corporate relocations but rather more remote outposts. These locales often suffer from a scarcity of housing—or high-quality housing—and a shortage of temporary or rental accommodations, putting a significant strain on mobility programs.

Zoom out: Beyond the fundamental issue of housing:

- These remote areas also grapple with a lack of essential amenities, infrastructure, and schooling options.
- There can also be supply chain challenges in these areas, like sourcing moving companies in such remote territories.
- These factors, combined with limited employment opportunities for relocating partners, have the potential to make these assignments less attractive to candidates.

The other side: Of course, relocation to large cities presents its own obstacles.

- Challenging locations highlighted by our respondents included Calgary, Kanata, Toronto, and Vancouver in Canada, as well as Boston, New York, Philadelphia, and Seattle in the United States.
  - The high cost of living and scarcity of affordable housing in these cities were the most common challenges highlighted.
- Furthermore, relocating employees moving from states like California, Florida, and Arizona are facing potential financial hits from home sale losses, as properties they bought in a peak market face depreciating values in today's real estate market.
- Interestingly, a few respondents also flagged "climate" as a notable concern. While they didn't elaborate, many recent climate-related events like flooding, storms, wildfires, and other environmental factors undoubtedly play a role in complicating relocation programs.

mobility matters

For more on climate change and its impact on mobility programs, listen to our podcast: Global Mobility in the Context of the Geopolitical Landscape

The bottom line: Whether it's the rustic charm of small towns or the urban hustle of major cities, each location presents a unique set of hurdles that companies must navigate to ensure successful corporate relocations. On-the-ground experts, whether in-house or in the form of supplier partners, can go a long way to mitigate such challenges.

most common move destinations*

US domestic mobility programs by state

2023	2024
Texas	Texas
California	California
Washington	Washington
New York	New York
Florida	Florida
North Carolina	North Carolina
Ohio	Ohio
Colorado	Colorado
Illinois	Illinois
Massachusetts	Massachusetts

canada domestic mobility programs by city

2023	2024
Vancouver	Vancouver
Toronto	Toronto
Calgary	Waterloo
Kitimat	Calgary
Montréal	Montréal
Waterloo	Kitimat
Mississauga	Markham
Markham	Mississauga
Edmonton	Edmonton
Saint John's	Saint John's

* Based on proprietary Cartus data.

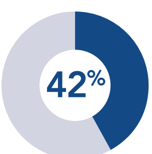
cost management

Most respondents (93%) say their relocation budget has stayed the same or increased in the past year.

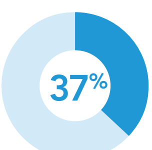
Why it matters: Cost remains a major concern, being the top mobility challenge this year and a key driver for reviewing policies in 2025. When managing relocation programs, respondents also listed "total cost reporting" as the second most critical area of technology, after data analytics.

Interestingly, 39% also anticipate budget approval challenges this year, underscoring the balancing act that many HR and mobility professionals face between cost and delivering a positive employee experience.

For those contemplating budget adjustments, the following are the top three strategies being adopted:



Identifying administrative process efficiencies
A clear indication that streamlining operations remains a priority



Adopting a more flexible approach to policy benefits
Flexibility is more than a buzzword; it's a necessity in today's dynamic domestic mobility environment

Using lump sums more frequently
A pragmatic approach to managing relocation expenses effectively, but does it provide the necessary support to relocating families?

Between the lines: The data indicates that most companies are keen to explore both administrative and policy changes to streamline operations. Interestingly, nearly a quarter of all respondents (24%) are not considering any cost-saving measures at all. This diverse approach highlights the varied priorities and strategies across corporate relocation, as companies navigate the complexities of domestic mobility against the unique business objectives of their own organizations and industries.

mobility spend over last 3 years*

US domestic mobility spend
-8%

Canada domestic mobility spend
-5%

** 2022 vs. 2024. Based on proprietary Cartus data.*

exceptions over last 3 years*

US domestic mobility exceptions
-34%

Canada domestic mobility exceptions
-23%

** 2022 vs. 2024. Based on proprietary Cartus data.*

flexible mobility

flexible policy approach

As mentioned previously in this report, the survey findings show an urgency on the part of respondents when it comes to prioritizing a more flexible approach to US and Canadian domestic relocation policy. (It was ranked in the top three priorities and challenges for 2025.)

Why it matters: This demonstrates an understanding among respondents that achieving a flexible program requires the right strategy, gaining buy-in from mobility stakeholders, and educating those same stakeholders to successfully drive any significant organizational change.

demand for flexibility and key drivers

When asked about the current demand for greater flexibility in their mobility programs, 42% of respondents said it stayed the same, while 40% noted an increase—25 percentage points lower than the rise in demand reported in our **Global Talent Mobility Survey 2024**.

Reality check: The emphasis on flexibility in international mobility may be due to the complex challenges of cross-border assignments and the influence of the competitive global market, motivating companies to offer flexible relocation options to attract and retain talent.

By the numbers: Key drivers for a more flexible approach to domestic mobility:

- changing employee expectations/needs (76%)
- improving employee experience (76%)
- cost savings (50%)

Rewind: The drive for flexible mobility programs has shifted over the last decade, according to the 2017 Cartus Domestic US Relocation Policy & Practices Survey. Eight years ago:

- Cost control was the top priority at 63%.
- Addressing changing employee expectations was in fifth place, with only 38% of survey respondents highlighting it as a priority.

Today, of those companies that provide a core/flex or similar policy, 49% allow the relocating employee to select their own benefits, with 38% stating it was the hiring manager or HR business partner that made the decision.

When it comes to non-traditional flexible benefits most attractive to relocating employees, companies listed their top three favorites:

- cash-out options
- cleaning services
- gift cards

Policy structure

Despite the obvious benefits of a more flexible approach to mobility, most organizations with US- and Canada-domestic programs still base policies on employee-level (59%) or move-type (57%).

- A core/flex approach has been adopted by just 19% (with tiers) and 11% (without tiers) of respondents respectively, offering a blend of standardized and customizable benefits.
- A smaller yet significant 9% opt for a menu-driven (à la carte) model, providing employees with the flexibility to select the benefits that best suit their personal circumstances.

The bottom line: We know that adding flexibility to a mobility program and its policies leads to enhanced employee experience and the ability to better meet employee expectations as well as business needs. In fact, a flexible policy is an anchor to an inclusive mobility program, a priority for many companies managing corporate relocation programs today.

1. **policies based on employee level (59%)**
2. **policies based on move-type (57%)**
3. **core/flex with tiers (19%)**
4. **core/flex without tiers (11%)**
5. **menu-driven (e.g., à la carte) (9%)**

> "I'm a team of one, and I also oversee DEI. Our relocation program is relatively small, so it is manageable."
>
> – survey respondent

DEI and inclusive mobility

Survey findings from mobility professionals show top priorities for 2025 that include "Improve the employee experience" and top challenges that show both "Meeting relocating employee expectations (e.g., accommodating personal or unique requests)" and "Achieving a more flexible approach to mobility."

Why it matters: Organizations continue to prioritize their strategies around talent acquisition, including the need to remain focused on recruiting, developing, and retaining talent.

- For most global companies, DEI is now an integrated part of their talent and business strategies, not a stand-alone activity.
- Today, employee engagement surveys frequently have an inclusion or belonging metric, recognizing their place as part of a successful company's culture.

inclusive mobility progress

Improving employee experience and meeting employee expectations require additional flexibility in policies and strategies throughout an organization, and mobility is no exception. With this in mind, we included a question in our survey about inclusive mobility progress: **"Where do you stand in terms of aligning relocation with your organization's DEI priorities?"** (We asked a similar question in our Global Talent Mobility Survey 2024.)

Zoom out: There are some similarities between the Global Talent Mobility and the US and Canada Domestic Mobility surveys. For instance, about the same percentage of companies are "making progress"* (39% domestic vs. 41% global) and self-identifying as "leaders in this space" (14% domestic vs. 12% global).

Zoom way out: However, we see a wider gap between companies that are "just getting started" (16% domestic vs. 26% global) and those who selected "not applicable" or "I don't know" (31% domestic vs. 21% global).

Between the lines: The findings show that far more mobility professionals responsible for domestic relocation programs in the United States and Canada are either unaware of or not engaged in the strategic link between their company's DEI/talent priorities and their relocation strategy. They also suggest that talent initiatives at companies with global strategies are generally farther along in their development.

* *"Making progress" in this context may include partner support, leveraging Employee Resource Groups (ERGs), or providing cross-cultural and/or language training.*

evolving employee needs and non-traditional services

Our survey aimed to uncover how companies are enhancing their relocation policies to better meet evolving employee needs, particularly through the lens of DEI and sustainability.

By the numbers: When we asked respondents about new services introduced based on these initiatives, the most prominent were:

- discard and donate (48%)
- settling-in support (40%)
- additional time off around the move (26%)
- travel for a friend or family member during settling-in (25%)

Interestingly, an additional 9% of the responses highlighted single-parent support, which aligns closely with the idea of providing extra time off around the move (ranked third).

What's happening: It is heartening to see that nearly half of our respondents are prioritizing environmental sustainability through "discard and donate" programs.

- This not only reduces waste but also supports a circular economy by giving new life to items that are no longer needed.

"Settling-in support" is another thoughtful service, reflecting a growing recognition of the challenges employees may face when relocating.

Companies are clearly showing that they value their employees' well-being and acknowledge that additional assistance is sometimes required to achieve a smooth transition.

Underscoring the importance of work-life balance and emotional support during such significant changes, "additional time off around the move" and "travel for a friend or family member during settling-in" both achieved a top four spot.

- It is evident that many organizations understand the necessity of a supportive network during relocations and are willing to invest in it.

Interestingly, our in-house experts also identified a small group of companies (14) who went above and beyond in this category by offering comprehensive support services including childcare, cleaning services, dependent parent support, and wellness support like gym memberships.

These benefits cater to a holistic approach, recognizing that employee needs extend beyond just the professional sphere.

The final word: Our survey highlights a promising trend towards more empathetic and inclusive relocation policies. Companies are stepping up to ensure their employees feel valued and supported, which is essential for fostering a positive and productive work environment.

Learn more about building a mobility program that meets all facets of a relocation: listen to our Mobility Matters podcast episode, "Moving the whole person – parts one and two"

sustainability

It is encouraging to see that 58% of respondents confirmed their businesses either have a formal sustainability strategy or are in the process of developing one that covers their entire organization and supply chain. This commitment is a testament to the growing importance of sustainability across industries.

Between the lines: Interestingly, among the 14% of companies that do not have a comprehensive sustainability strategy, 40% still consider environmental, social, and governance (ESG) performance when making procurement decisions. This shows that sustainability principles are still impacting procurement decisions even without a formal strategy.

mobility and sustainability alignment

There is a noticeable opportunity to better connect mobility with ESG goals.

Why it matters: With 27% of respondents unsure if their company has a strategy in this area and a third unsure how ESG performance influences procurement, there is clearly room for improvement in communication and integration between a company's mobility function and overall sustainability vision.

- Among the 58% whose mobility programs are evolving to include sustainable options, uptake, and maturity levels vary significantly.
- The decision-making process also differs, with some choices made at the business level and others by individuals.

It is encouraging to see that only 12% of businesses limit their sustainability actions to offsetting emissions. This indicates that most are taking a more comprehensive approach, recognizing the broader importance of reduction.

Zoom in: A particularly interesting observation comes from looking at engagement with "discard and donate" programs.

- A third of respondents from companies using these services said that they either do not have or are unaware of a wider company sustainability strategy.
- Moreover, 37% of respondents using these services indicated that they had no sustainability-focused services in action or development.

This highlights a significant opportunity for businesses to gain recognition for their sustainability impacts through actions they might not even realize are contributing to their goals—e.g., discard and donate. It also suggests that mobility teams may sometimes be isolated from broader company initiatives, a division that may limit the potential impact of sustainability efforts.

The bottom line: ESG-focused benefits can often serve multiple purposes. For example, "discard and donate" programs not only help contain costs and add social value but also reduce emissions. By viewing ESG holistically rather than focusing separately on sustainability or DEI, in-house HR or mobility teams might find they are already contributing more to the company's goals than they realize. By recognizing and integrating these efforts, we can create more cohesive and impactful sustainability strategies that benefit everyone involved.

How have your organization and suppliers integrated AI into relocation?

We're currently looking at a platform for relocating employees to utilize, on what to expect during the relocation process."
– Anna Ciri, Manager, Domestic Mobility, Textron Inc.

"Still assessing and introducing."
– survey respondent

"Still exploring but using it as an internal chatbot."
– survey respondent

technology

The majority of respondents (89%) said they are not looking for a tech-only solution for specific move-types. When considering their relocation program administration, respondents listed the following tools and technology as the most critical to their company:

1. **Data analytics:** By enhancing mobility data analytics capabilities, companies can uncover valuable insights into relocation trends, costs, and employee satisfaction, which will enable them to make smarter decisions and optimize their relocation programs.
2. **Total cost reporting:** Implementing robust total cost reporting tools helps to monitor relocation expenses, ensure budget adherence and financial transparency, and calculate return on investment.
3. **One source of truth for all mobility data:** Creating a centralized repository for all mobility data streamlines processes, reduces errors, and improves data accessibility for everyone involved in the relocation process.
4. **Integration with all suppliers and Human Resources Information Systems (HRIS):** Ensuring seamless integration with suppliers and HRIS enhances coordination, improves data flow, and lightens administrative workloads, leading to a more efficient relocation program.
5. **Accessibility (e.g., screen reader support):** Prioritizing accessibility features ensures all relocating employees, including those with disabilities, can access and utilize relocation tools and resources effectively, promoting inclusivity and adherence to accessibility standards.

local mobility vs. artificial intelligence

While survey respondents have shared varied experiences regarding the integration of AI into their organizations' relocation processes, there's a sense of cautious optimism among the group.

- Just over a fifth (21%) currently use AI for business and process tasks.
- A third indicates plans to use AI in the future.
- Some organizations are even exploring AI platforms to create central hubs that provide employees with all the information they need during relocation, including destination resources.

What else? Several respondents mentioned the use of AI for data analysis and internal support systems, such as chatbots designed to answer basic relocation questions. Overall, while there is a growing interest in leveraging AI for relocation, many respondents indicated that their organizations are still in the early stages of exploring and implementing these technologies.

When asked how their organization and suppliers have integrated AI into relocation, 81% of the 78 respondents who answered the question said they have not, are unsure, or have only experienced limited integration.

Domestic mobility in the United States and Canada is evolving just as quickly as the global talent landscape. The pressure is on companies to deliver an exceptional employee experience.

By balancing cost management with innovative solutions and putting employees at the heart of corporate relocation strategies, organizations like yours will be ready to tackle the opportunities and challenges that lie ahead.

For more advice and recommendations on your domestic or global mobility programs, email cartussolutions@cartus.com or visit cartus.com.

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