

the great balancing act:

optimizing the employee
experience while controlling costs





"As HR and mobility professionals navigate the complex landscape of global mobility programs, they encounter the delicate balance between business needs and the well-being of individual employees, striving to support relocating families while safeguarding the company's bottom line. It's a challenging mandate, yet there are valuable insights to be gained from benchmarking intelligence, like this survey report, to leverage and build strategies to support the evolving needs of global mobility."

- Marilyn Giglio-Knapp,
*Vice President, Global Talent Mobility
and Consulting Solutions, Cartus*





global talent mobility survey 2024

the great balancing act: optimizing the employee experience while controlling costs



Welcome to our Global Talent Mobility Survey 2024, a comprehensive exploration into the dynamic intersection of macro-economic challenges, employee experience, and the ever-evolving landscape of global mobility strategies. Drawing on global insights from 138 respondents across diverse industries, this report unravels the intricate balancing act of dichotomies that define the current corporate relocation landscape.

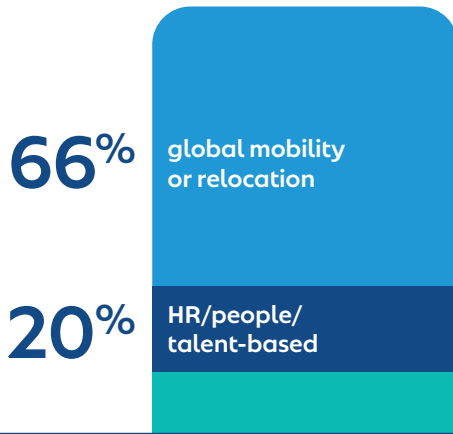
Preliminary themes emerging from the data highlight an unwavering focus on employee experience and cost-effectiveness. Striking a delicate balance between these two imperatives requires innovative (and often flexible) mobility policies. Other dualities facing HR and mobility professionals include the need for the human touch against a backdrop of rapid technological advancement. As artificial intelligence (AI) evolves at lightning speed, the timeless necessity for an empathetic (and human) guide and advocate persists.

Such conundrums, however, open doors to innovate and embrace creative change for a positive international assignee experience. **The World Economic Forum** dubs 2024 [the year of rebuilding trust](#), and our latest research provides insights into how companies of different shapes and sizes are managing this moment.

we extend a heartfelt thank you to all those who completed our inaugural global talent mobility survey and provided valuable insights to capture the moment and shape the future of our industry

who

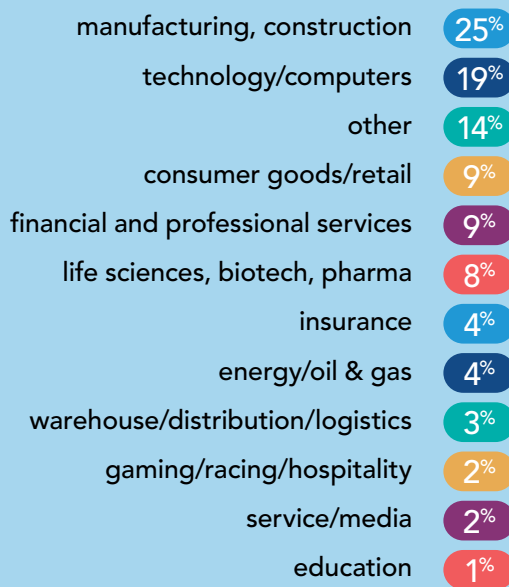
participant demographics



66% of respondents sat within the global mobility or relocation function within their organization. An additional 20% were HR/People/Talent-based.

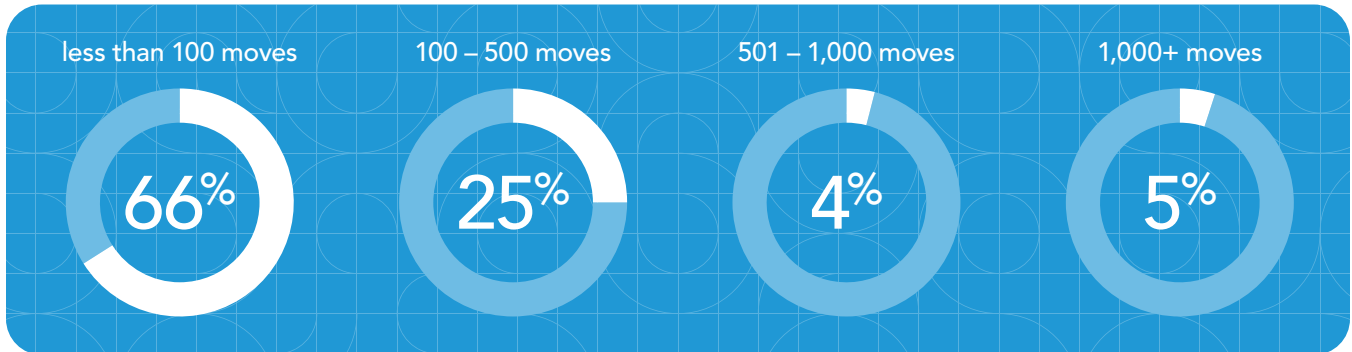
Industries represented in the survey span automotive, construction, consumer goods, finance, gaming, life sciences, manufacturing, oil and gas/energy, pharma, retail, and tech.

respondent industries

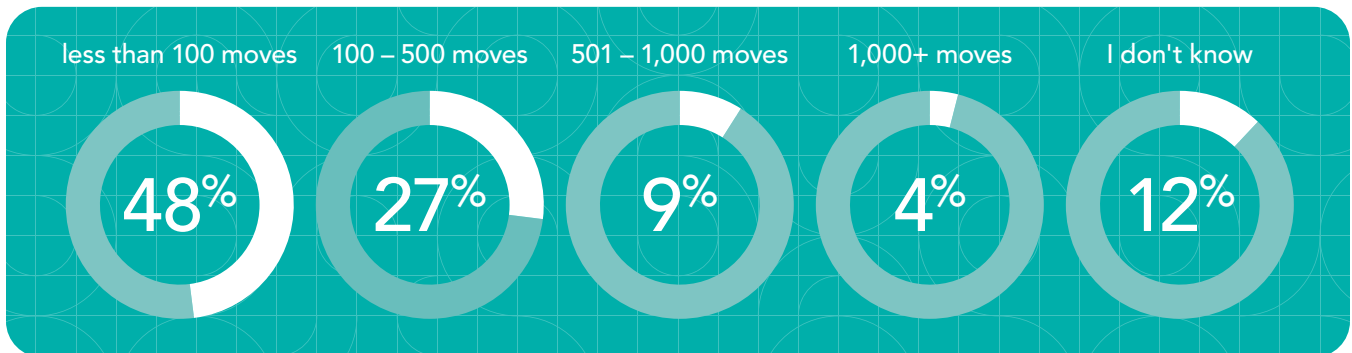


respondent program size

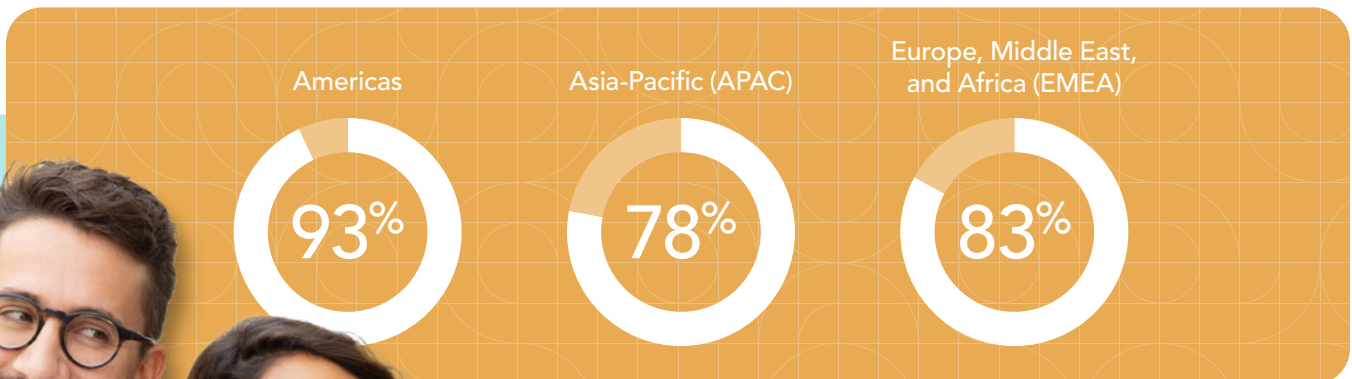
international (cross-border) move volume



intra-country (domestic), non-US move volume



regions where respondents are relocating employees into and out of



mobility volume and activity

move patterns

Most participants (70%) said their mobility volume has increased or stayed the same in the last two years, and this activity is primarily driven by a lack of local talent, followed by company growth and expansion into different markets.

In the absence of local talent, it is critical that organizations prepare assignees to be successful in the host location from the moment the assignment begins. Demonstrating an understanding of this need, when asked which areas required increased investment within the mobility area, respondents listed the “candidate selection/readiness process” in the top three.

For the 30% of respondents who said they had seen a decline in activity in the last two years, the vast majority cited “cost containment strategy” as the reason. This was 44 percentage points ahead of the second next reason for activity decline (“reducing volume in different markets”).

Looking forward, the types of mobility activity anticipated for 2024 include:

- business traveler (68%)
- intra-country, international long-term, and international short-term moves (67%)
- employee-requested moves (60%)

While self-initiated moves and associated policies have existed for decades, the original intent to support occasional requests from employees who might have a familial need to relocate—e.g., a partner’s career change—has evolved to be more talent driven, even prior to the recent pandemic.

As a result, companies want lower-cost ways to support employee flexibility and personal and career growth, and the reality is that in this post-pandemic world, many employees don’t want to feel tied down. These moves require mobility teams to ensure they have policies in place that are fit for this new purpose.

The prevailing perception among many employees is that remote work is now universally acceptable without any restrictions. According to the [ADP Research Institute](#), nearly three in 10 workers anticipate that within five years, having the ability to work from anywhere in the world will become the “norm in their industry.” This perception may stem from either a company’s existing flexible work policy or employees assuming such flexibility exists. In any case, organizations should take proactive measures to clarify and align employee expectations via a well-thought-out policy and communication strategy.

top 3 reasons for mobility activity...

increasing over the past two years

1 talent not available locally (56%)



2 company growth (52%)



3 expansion into different markets (48%)



decreasing over the past two years

1 cost containment strategy (70%)



2 reducing volume in different markets (26%)



3 negative company growth (23%)



intra-country moves

According to our survey data, 80% of respondents actively engage in intra-country moves, and three-quarters of this group have policies in place for managing these move-types, suggesting a conscientious approach towards fostering structured, consistent, and streamlined mobility processes.

Additionally, just over a fifth (21%) expressed intentions to initiate such moves within the next two years.

Administrative centralization

The crux of our findings revolves around what appears to be a shift in the administration of intra-country moves, with half opting to centralize the administrative aspect within their global mobility function. After that, it is an almost even split between those who delegate this responsibility to local entities and those who adopt a hybrid approach.

Interestingly, 34% of companies yet to centralize administration are actively considering this strategic shift. This inclination signifies a growing recognition of the potential benefits offered by a centralized approach.

The prevalent reasons cited for resisting centralization of intra-country moves include the perceived complexity and magnitude of the task, resource constraints in

managing the entire assignee population, and a preference for leveraging the specialized knowledge of in-country teams to facilitate these transitions. An added benefit that comes with centralizing policy and administration is better ensuring that the employee experience is less subjective and more equitable. For those companies focused on DEI (Diversity, Equity, and Inclusion) priorities, this supports alignment between Global Mobility and the larger organization.

additional insights

In their comments, participants also highlighted key focal points around improving intra-country moves, including:

- the need to create policies and standardized approaches in major locations
- the need to simplify non-US intra-country relocation policy structures
- ensuring cost-effectiveness
- meeting compliance issues
- exploration of incentivizing intra-country moves to higher-cost regions by offering housing assistance or other allowances



"A priority goal for 2024 is the creation of regional intra-country relocation policies."

– Cartus survey respondent

where in the world

Those who completed our survey represent a truly international audience whose companies relocate employees into and out of the Americas (93%), Asia-Pacific (78%), and Europe, Middle East, and Africa (83%) regions.

2 — **10%**
United States

8%
Malaysia

1 — **12%**
Vietnam

8%
Singapore

8% **3**
Australia

new locations

Vietnam was cited as the top destination among the 43% of respondents who have sent assignees to new countries in the past two years. This was followed closely by the **US**, with **Australia**, **Malaysia**, and **Singapore** coming jointly in third.

challenging locations

According to our respondents, following are the top 10 most challenging locations to send assignees to in the past two years:

Rank	Country	Challenges
1	United States	Immigration, cost of housing, and housing shortages
2	China	Immigration, currency restrictions, compliance, and political environment
3	UK	Immigration, cost of living, and tax
4	India	Immigration and tax
4	Singapore	Immigration and cost of living
5	Australia	Immigration, housing, medical coverage, and returning pets
5	Mexico	Immigration, compliance, safety concerns, and attracting talent
5	Vietnam	Immigration, safety concerns, and compliance
6	South Africa	Immigration and housing
7	Germany	Immigration and cost of living
7	Switzerland	Immigration, tax and compliance, and cost of living



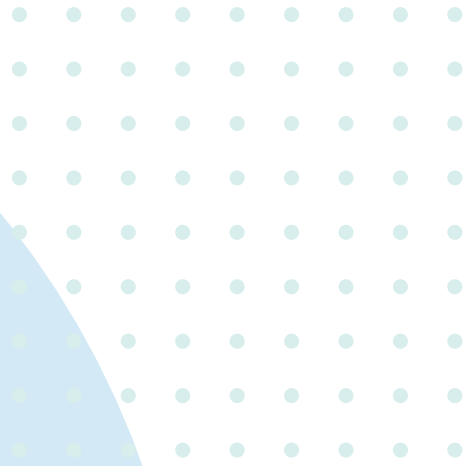
immigration appeared in all of the top 10 most challenging destination locations

The United States emerged as the destination with the greatest challenges, with global mobility professionals grappling with immigration complexities alongside housing challenges, presumably triggered by the current real estate market conditions. Not far behind, China claimed the second spot, presenting currency restrictions, immigration intricacies, compliance hurdles, and the need to navigate a complex political environment. The UK secured third position, with steep living costs and taxes, as well as immigration challenges.

When examining the top 10 most challenging countries, it is notable that they are predominantly established economies as opposed to emerging markets. Countries like Singapore, Germany, and Switzerland also made appearances, adding depth to the landscape of relocation challenges.

Immigration stood out as a paramount concern, appearing in all of the top 10 most challenging destination locations, with nearly half (47%) of respondents citing it as a current challenge. Visa wait times, complex processes, and overarching costs remain dominant issues. While immigration has always been a highly complex element of international relocation, the recent increase in employee-initiated moves (cited by respondents as the third most anticipated move-type for 2024) and cross-border remote work may add to this challenge going forward.

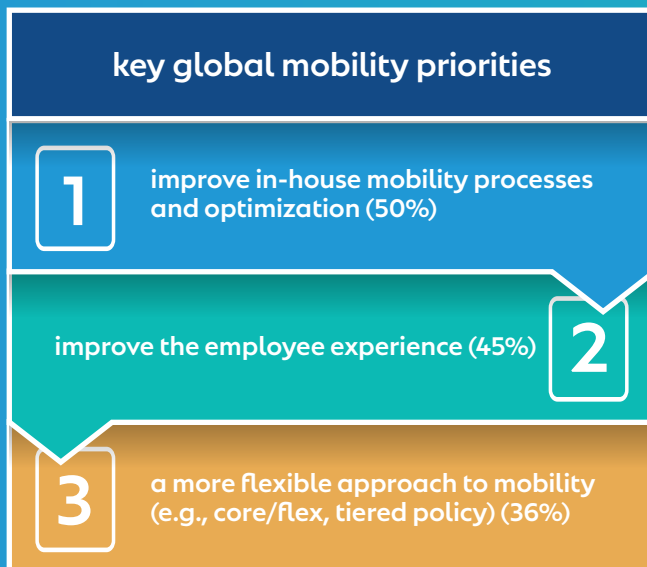
Additional challenges related to compliance issues and housing (encompassing both cost and shortages), with each highlighted by 15% of respondents, outline the multifaceted obstacles encountered in global moves today.





For more on how to achieve cost savings through policy design, read our white paper series: [part one](#) and [part two](#).

navigating the mobility terrain: harmonizing priorities and pioneering solutions



In our analysis of the 2024 global mobility priorities and challenges as outlined by survey respondents, a fascinating parallel emerges. The top three priorities align with the top three challenges, painting a vivid picture of the relationship between organizational aspirations and the roadblocks they encounter. Optimizing mobility processes, elevating employee experiences, and embracing a more flexible relocation strategy emerge as the keystones for 2024.

These focal points for the year demonstrate a gravitational pull between escalating costs and the ever-evolving needs of employees—a trajectory that resonates with the trends highlighted in [Cartus' "What does your mobility program look like for 2023?"](#) survey report. Last year, it was the surge in global expenses amidst a challenging economic landscape that took center stage as the primary hurdle, with employee experience as the key priority.

As organizations chart the course ahead this year, it is evident that aligning aspirations with the reality of overcoming challenges is pivotal to their strategies.

increasing workload and pressure

The number one mobility priority for 2024, "improved mobility processes and optimization," may encompass areas such as talent acquisition, talent management, and managing workforce resources. Indeed, at Cartus we have heard from many clients that mobility teams are being asked to "own" remote worker populations, both from a management and compliance perspective, without receiving additional headcount to manage the extra workload. Working with a supplier partner that offers a distributed workforce solution is one way to meet this challenge.

Since the pandemic, in-house global mobility teams have arguably played a more significant role within organizations, with increased influence over key stakeholders. Nevertheless, continued trends such as remote workforces, DEI initiatives, and heightened competition for talent, have intensified the workload and pressure on these teams. These trends, coupled with the rising intricacies in the support required by assignees and the broader business, underscore the critical need for optimizing mobility processes like never before.

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starting your flexible mobility journey?

Listen to our podcast, “The future of mobility is here, and it’s flexible!” with Amy Spiker, Global Talent Mobility Leader, Eaton.



navigating challenges

Addressing rising mobility costs

The art of developing a relocation policy that balances cost savings, assignee satisfaction, and talent acquisition is the ultimate goal for global mobility professionals. The best ways for organizations to identify innovative ways to enhance their program and achieve cost savings will be to approach a policy review with an open mind, combined with creative thinking and stakeholder input.

Meeting relocating employee expectations

In the wake of the pandemic’s transformative impact on work culture, organizations face new requirements in meeting their employees’ expectations, and not exclusively those from younger generations. While generational changes were emerging and influencing our industry prior to 2020, shifting expectations grew and have begun to normalize as we come out of 2023. We are now in a time when personalized and unique requests are at the forefront of workplace priorities, not just within global mobility, but throughout workplace culture.

These changes in expectations are recognized across a wide range of industries and organizations that

now understand the intrinsic value in championing and actualizing the duty of care towards their workforce. This paradigm shift underscores the necessity for organizations to not only accommodate but also embrace the diverse and personalized needs of their employees, understanding that a nurturing, supportive environment fosters loyalty, engagement, and heightened productivity.

Achieving a more flexible approach to mobility

A more flexible approach to mobility has evolved alongside emerging trends and practices, constantly revitalizing its scope, but today, amidst a pressing need to champion a diverse workforce and a priority to meet changing employee needs, its significance has soared to new heights. With numerous approaches to adding flexibility to policies and programs available, each with their own set of considerations and nuances, a flexible program requires a well-thought-out plan. Fortunately, adding flexibility to policy—whether that means creating a specific core-flex policy or related variant—has come a long way in recent years, and with the right approach and proper planning, it can be achieved.

Tax and compliance

International tax compliance is challenging and is further complicated by relocation

implications, which may be the reason “improved software for tracking/compliance purposes” was the number one area where respondents said their companies needed to spend more to meet business needs. As countries around the world continue to digitize information and recognize the potential of increased revenues from fines generated from corporate and individual non-compliance, the risks are higher. As such, it remains imperative that organizations have robust technology in place to ensure they and their employees remain compliant, wherever they are located.

It is interesting to note that, while compliance held a joint-third position among this year’s primary mobility *challenges*, it seems to have lost its previous prominence as a strategic focus. In our [2023 benchmark survey](#), compliance ranked as the third-highest priority, but in our most recent 2024 survey, it slips to sixth position. This change could be attributed to the evolving nature of the remote work landscape, which is no longer as novel as it was during and immediately after the pandemic. Although compliance remains a persistent challenge, there are emerging trends and focal points demanding increased attention from organizations.

the year of policy redesign



With the priorities and challenges already discussed above, including enhanced employee experience, program optimization, attention to cost, and shifting employee needs, it comes as no surprise that a significant 62% of survey participants are contemplating a policy review in the upcoming year, underscoring the proactive stance of organizations towards refining their mobility frameworks.

Our survey findings offer an intriguing insight not only between the challenges and priorities faced by our respondents, but by the driving force behind the need to review or redesign their mobility policies. Once again, employee experience takes center stage, emerging as the leading motivation prompting organizations to contemplate policy revisions (67%). Flexibility (64%) and cost considerations (58%) closely follow, reflecting the interconnected priorities shaping policy evolution in 2024.

When asked about the frequency of policy reviews, 45% of respondents are aligned with what our industry considers best practices, opting for assessments every one to two years, while a third tend to review every three to four years.

a flexible approach to mobility

In the ever-evolving plot of relocation, flex mobility has emerged as a protagonist, steering the trajectory of relocation programs towards a new narrative where employee experience remains key. Indeed, most survey respondents (65%) have seen increasing demand for greater flexibility in their programs. The fuel propelling this drive continues along similar

themes we have seen elsewhere in this survey's data: employee expectations and needs, followed by budget constraints and macro-economic pressures.

Delving deeper into the realm of core/flex programs—policies made up of preset relocation benefits offered to all employees (core) and supplemental benefits that employees can choose from (flex)—an intriguing revelation surfaces: While 32% remain hesitant about embracing a flexible approach, a slightly greater number, 36%, empower their relocating employees by allowing them to choose their own supplemental benefits.

An alternate throughline has also been identified, whereby 22% continue to place this decision-making power with hiring managers, and 17% delegate it to HR business partners. Why? It appears it may be a strategy tethered to the strings of cost control, with one respondent noting, "We have seen a lot of success in the core/flex offering, where HR selects [relocation] benefits. Makes the business feel more in control of costs." The reality is that hiring managers have a wide range of needs to meet as they successfully recruit new talent, including diverse candidate needs along with the budget realities of the businesses they serve. Flexibility is not just for the employee.



"The right amount of time will depend on organizational and employee shifts, a sense of how well the current strategy is meeting your global mobility needs, and having a good sense of how well the policy and program are aligned with the company's culture and priorities. It is important to have the global mobility experience in tune with the larger organization."

- Terri Bonfiglio, Director, Consulting Solutions, Cartus

key drivers for a more flexible approach to mobility

changing employee expectations

65%

changing employee needs

60%

budget constraints/
macro-economic
environment pressures

54%

lump sum policy

Lump sum moves are a priority for 38% of respondents who completed our survey, but for the plurality (41%) they are not. In general, entry-level and mid-level employees (both 72%) typically receive lump sums, with half of respondents also providing lump sums to their internship population. Interestingly, more than a third (36%) of respondents also indicated that senior employees receive a lump sum when relocating. However, further analysis reveals that most of those companies are from the technology industry, which provides greater understanding of these findings. Lump sum continues to primarily be an option for early career employees, with more limited personal belongings and more motivation for career adventures.

international assignment compensation services

According to our survey, 42% of international assignment compensation services are administered in-house, yet a significant 31% entrust this critical task to their relocation services partner.

When it comes to tax gross-ups, although a third manage these in-house, more respondents (43%) chart a course guided by tax providers, leveraging their expertise to navigate the intricate web of tax gross-ups within their mobility ecosystem.

HR and mobility professionals are frequently required to provide forecasted relocation expenses to the financial groups within their company, including a comparison of actual costs against the initial cost

projection. Given that global payroll and accounts payable are often decentralized within a company, a clear comparison and forecasting of costs can be extremely challenging, if not impossible. Yet having the ability to run multiple “what if” scenarios to compare the assignment costs of various candidates is an important part of the candidate selection process.

When asked what three cost projection features are the most important to their organization, an overwhelming 74% indicated it was the ability to use cost projections to establish cost accruals. In joint-second with 52% was the ability to adjust or override calculated line items and side-by-side comparison calculations.

“We have seen a lot of success in the core/flex offering, where HR selects [relocation] benefits. Makes the business feel more in control of costs.”

– Cartus survey respondent



cost management and effectiveness

When it comes to mobility budgets, our recent findings underscore a nuanced landscape. While the vast majority (82%) of respondents indicated that their global mobility budgets increased or stayed the same last year, the anticipation of budget approval challenges in 2024 looms at a significant 57%.

Identifying what cost measures to implement within your mobility program is just the first step. The second, and arguably more challenging, is to ensure they do not negatively impact the overall assignee experience. The cornerstone of this endeavor lies in developing a framework—a strategic roadmap that ensures consistency and equity in decision-making, fostering critical buy-in from stakeholders.

one size does not fit all

The journey to cost containment is dictated by industry dynamics, assignee demographics, destination profiles, move volumes, and an organization's adaptability to change. Regardless of how you approach cost management, it will undoubtedly remain a pivotal focus for many in the coming years. Half of respondents report that their organization's focus on global mobility cost control has increased compared to the previous two years.

Embracing cost effectiveness transcends a one-size-fits-all approach. Instead, regular policy reviews that ensure alignment with organizational goals and the pulse of the talent landscape are two crucial components.

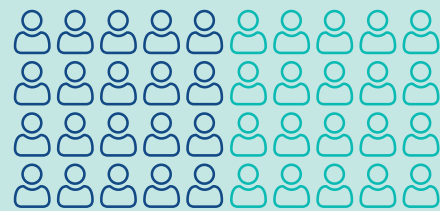
stakeholder perception

Perception should not be underestimated when implementing a cost containment strategy. Understanding stakeholders' perspectives unveils the potential resistance to change and brings to light discrepancies between perceived importance and actual cost impact.

Strategies for cost savings are diverse, with most eyeing administrative process improvements (55%) and many considering policy restructuring or redesign (45%). Interestingly, five policy-driven responses were also listed as considerations, including:

- capping mobility policies
- reducing assignment benefits
- restructuring/redesigning policy
- tiered programs based on purpose or objective of assignment
- using lump sums more often

HALF
of respondents



said their organization's
FOCUS on

**global mobility
cost control**



has
INCREASED
compared
to the
**PREVIOUS
TWO YEARS**



For more on how to achieve cost savings through policy design, read our two-part white paper: [part one](#) and [part two](#).



data, data, data

Employing available reports to unravel the intricate layers of a mobility program remains key. As noted previously, in identifying crucial areas for increased investment to align with business imperatives, respondents listed “improved

software for tracking and compliance purposes” as the number one requirement. The second most popular area for increased expenditure was the candidate selection/readiness process—highlighting again that, for most organizations, the employee experience and the importance of talent is never far from mind or strategy.

required areas for investment

To meet business needs, in what area(s) does your organization need to increase expenditure?

- improved software for tracking/ compliance purposes 41%
- enhanced candidate selection/ readiness process 35%
- enhanced recruitment resources to attract external talent 30%
- additional assistance to support employees in emerging markets 28%
- add assignment benefits to obtain key talent 22%
- other 12%





listen to our top 10 ways to make your global mobility program more inclusive: [part one](#) and [part two](#)

diversity, equity, and inclusion: creating “I belong” mobility experiences

Organizations across industries recognize the pivotal role of Diversity, Equity, and Inclusion (DEI) to shape vibrant cultures, attract the best talent, and foster innovation. When it comes to DEI, a company’s work and efforts are never done. As DEI strategies mature, companies are embedding a culture of inclusion across their organizations—there is no longer room to “opt out.” Indeed, a [2023 survey by the ADP Research Institute](#) of 33,000 employees across 17 countries found that three quarters (76%) would consider leaving their company if they did not have a DEI policy.

Over the last few years, the Global Mobility industry has good news to share on this front, too. The above landscape for larger organizational priorities regarding DEI has begun to normalize within mobility policies and practices. “Inclusive Mobility” is a new way to describe this emerging area. Encouragingly, Cartus found that 61% of our respondents indicated they are most focused on better understanding all types of diversity over the next 12 months to ensure they are meeting changing employee needs and employee experience expectations. A much smaller 18% said they wanted to focus on the category of cultural diversity, while 15% cited single parents as an area of focus, a category of employee and family that started to gain attention in 2022.

non-traditional service offering

It comes as no surprise that our industry is becoming more creative when it comes to inclusive benefits and support, with non-traditional services emerging to attract and retain talent. When asked, over half of respondents cited that in lieu of moving items, they provided their assignees with a lump sum to make purchases in the host location. A third of respondents cited travel support (cost of flights or accommodation) for a family or friend during the settling-in/temp living period—especially for single parents. Other non-traditional services offered to assignees may include home office set-up support, cleaning services, pet daycare, contributions to sustainability initiatives, or grocery deliveries. Cartus continues to track emerging flexible benefits that meet diverse employee and family needs and enhance the mobility experience. Our industry and supply chain must continue to innovate.



LGBTQ+ moves

In 2023, Cartus increased its focus on developing LGBTQ+ (lesbian, gay, bisexual, transgender, and queer or questioning) knowledge and confidence when it comes to supporting our clients' inclusive strategies and in supporting LGBTQ+ employee and family moves. We have a number of clients whose companies participate in the Human Rights Campaign's Corporate Equity Index Survey, a benchmarking tool on corporate policies, practices, and benefits related to LGBTQ+ employees. To that end, we added questions specific to LGBTQ+ moves to increase industry data and better understand where progress is happening and where progress is needed.

When queried about support resources for LGBTQ+ employees or families relocating to regions with civil rights barriers, over half of respondents indicated they provide no such provisions, exposing gaps in safeguarding aspects like housing, adoption, education, and access to essential public services. A third also remained uncertain about the level of support being extended to LGBTQ+ individuals within their assignee population.

While some respondents mentioned ancillary support from internal or external safety teams and specialized in-house training for assignees, others highlighted another approach, whereby locations deemed unsafe for LGBTQ+ employees resulted in a "split family" status. This is where the assignee and family live apart for some or all of an assignment. The ad-hoc, exception-driven approach adds flexibility and is historically used, but it does not lead to an "I belong" outcome.

Moreover, inclusive companies can actively support assignees whose partners, notably in the LGBTQ+ community, may face legal hurdles in joining them due to immigration restrictions at the destination. For instance, 70% of respondents reported their companies lack guidelines addressing safety and welfare concerns for LGBTQ+ employees and their families relocating to regions with anti-LGBTQ+ laws, exposing a substantial deficiency in supportive measures.



Respondents who identified as leaders in the DEI mobility space typically provide or facilitate:

- Employee Resource Groups (ERGs) as resources for relocating employees
- DEI-specific resources and training
- safety and security training
- company-sponsored events
- information and contact details for LGBTQ+ organizations
- travel safety reports and resources
- cultural training





"Inclusive environments beget inclusive behaviors and trust with regards to employees volunteering personal demographic information."

- Lisa Johnson, Director, Global DEI Solutions, Cartus

diversity data

Tracking DEI data remains a hurdle, compounded by the sensitive and protected nature of personal information. Inequities in international assignment opportunities could impact career progression and organizational loyalty. However, navigating privacy concerns and legal restrictions poses challenges in collecting such information. As one respondent stated, "Many of the DEI categories are not trackable and/or considered personal/private information."

It has been found across a number of studies, including our own [2022 Cartus DEI and Global Mobility Pulse Survey Report](#), that the more inclusive and open companies are to diversity, the more willing employees will be to volunteer their visible and invisible diversity (e.g., family profile, nationality, sexual orientation, disability, and gender identity).

aligning global mobility with the wider organization

There are several pivotal roles when it comes to aligning global mobility programs with DEI priorities—including [the selection and receiving managers](#), to name two—but the global mobility team are also key and need to upskill and become more confident in their DEI knowledge and capabilities.

While progress is evident in aligning mobility programs with wider organizational DEI priorities, there is a journey ahead. Despite 41% making strides in aligning global mobility with DEI priorities, a substantial 26% are just getting started on this journey. Only 12% consider themselves leaders in this space, indicating substantial room for growth.

It should be noted, however, that participants in this survey represent a wide range of global mobility team structures, from "teams" of one person to large, globally dispersed teams, and everything in between. As team structures vary widely, it influences the accessibility of local DEI knowledge and the integration of these priorities within a business.

In summary, strides are being made in the DEI mobility space, but significant opportunities and pressing needs remain. Aligning global mobility with DEI priorities demands concerted efforts, ongoing education, and a collective commitment to creating inclusive "I belong" moments for all employees, regardless of their diverse backgrounds or circumstances.

the state of marriage equality in 2024

There are currently 35 countries where same-sex marriage is legal: Andorra, Argentina, Australia, Austria, Belgium, Brazil, Canada, Chile, Colombia, Costa Rica, Cuba, Denmark, Ecuador, Estonia, Finland, France, Germany, Iceland, Ireland, Luxembourg, Malta, Mexico, the Netherlands, New Zealand, Norway, Portugal, Slovenia, South Africa, Spain, Sweden, Switzerland, Taiwan, the United Kingdom, the United States, and Uruguay.

Source: Human Rights Campaign, 2024



the world of remote: hybrid, extended business travel, and remote worker moves

Amidst the shifting landscapes of corporate relocation, the strategic use of remote work has emerged as a powerful tool for many organizations. Surveying our 138 respondents revealed a fascinating split regarding international remote workforces: 57% have a remote workforce, with 79% of that group offering no company-sponsored benefits. For the remainder who do offer benefits, most of the support is in the form of compliance-related services, with the top three inclusions as follows:

- immigration assistance (59%)
- compliance support (48%)
- medical coverage (38%)

In Cartus' experience, there is often an assumption that international remote workers receive other perks and benefits—e.g., a travel allowance for returning to the office for meetings. Our survey shows that only 10% of respondents with a remote workforce offer such an allowance, however. Tax handling (34%) and providing remote work equipment (31%), while not the norm, are also only covered by a relatively small number of participating companies.

In terms of volume, post-pandemic levels present a varied landscape with responses reflecting a tripartite split between those experiencing an increase, decrease, and seeing a return to pre-pandemic travel volumes.

remote work policy

Once established, a well-structured remote work policy prevents costly exceptions and streamlines approval processes. Yet [research](#) conducted by Mercer found only 38% of companies have a formal policy or set of guidelines in place for temporary international working.

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

Extended Business Travel (EBT): Business-initiated request for the employee to work from a different business location for a defined period of time (e.g., employee travels from the UK to France to work from their Paris office for an extended time period, typically 30 to 90 days).

Hybrid: Employees work partly at home and partly in the physical office, 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 of time (e.g., an employee based in the United States wants to work from Spain for two months during the summer).

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



Amidst the surge of hybrid work models, EBT and remote work challenges linger. Compliance hurdles persist alongside the debate over policy ownership. Survey insights unveiled that nearly half of respondents (49%) attribute ownership of their company's international remote work policy to corporate HR, closely followed by the global mobility function (42%). However, many respondents acknowledge a shared ownership involving various units like business leaders, corporate HR, tax, mobility, legal, and total rewards.

In the world of remote work policies within an organization, effective communication among stakeholders is crucial. At Cartus, we are aware of situations where business unit leaders or line managers take charge of the policy and oversee the remote workforce. However, they often forget to keep the HR/global mobility team in the loop about the specific whereabouts of employees.

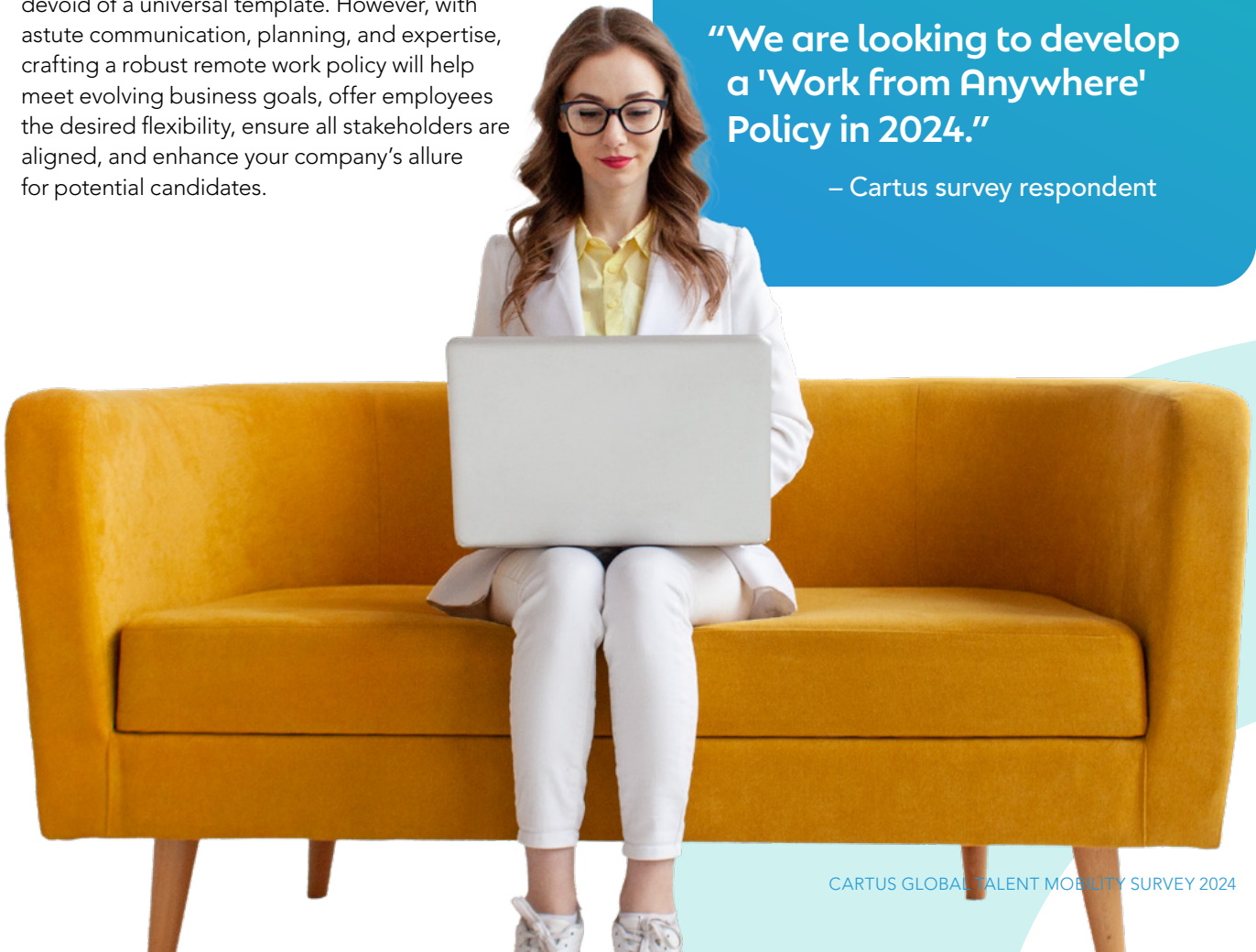
Remote or hybrid work mandates an adaptable approach, devoid of a universal template. However, with astute communication, planning, and expertise, crafting a robust remote work policy will help meet evolving business goals, offer employees the desired flexibility, ensure all stakeholders are aligned, and enhance your company's allure for potential candidates.

“We differentiate between business-requested (e.g., business trip) and employee-requested (international remote work) and offer different support and benefits, depending on the reason for travel.”

– Cartus survey respondent

“We are looking to develop a 'Work from Anywhere' Policy in 2024.”

– Cartus survey respondent



striking the balance: human touch in a tech-driven landscape



In an era teeming with technological innovations, our survey has illuminated a significant finding: the pivotal role of the human touch in the realm of employee relocation. Amidst a landscape full of digital advancements, a resounding 90% of respondents express their disinterest in a purely tech-driven solution for specific mobility populations. This underscores a clear sentiment: what both clients and relocating families seek is not solely technology but a guiding hand—a knowledgeable expert in their field.

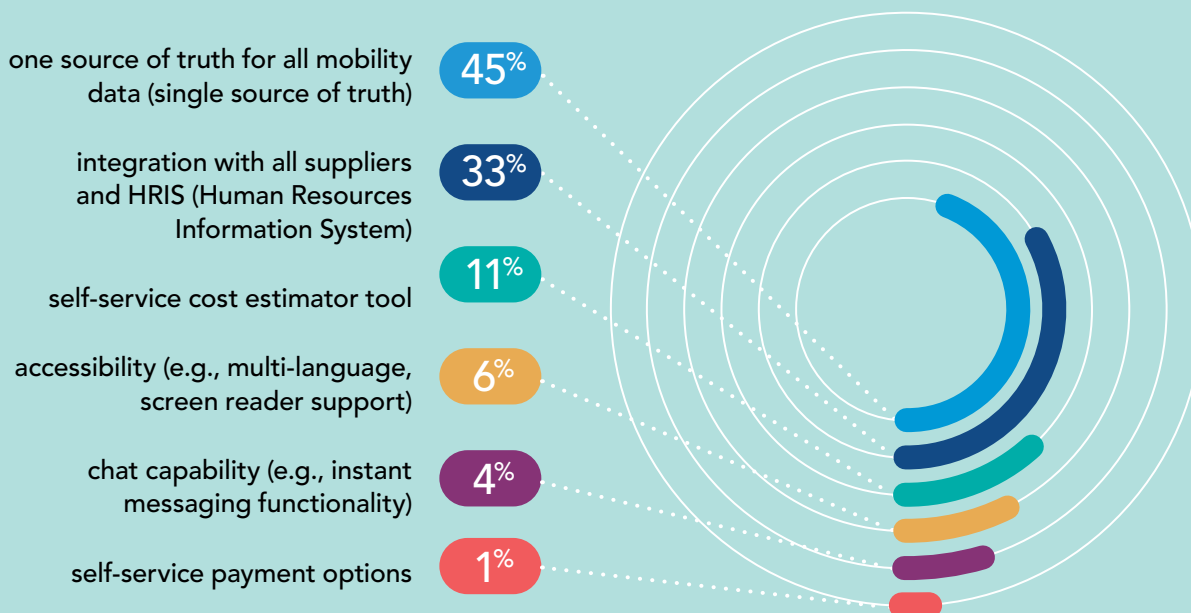
technological priorities

Of course, digital tools to support mobility programs do have their place in providing support to HR and mobility professionals, most notably saving them much-needed time and resources.

tech focus areas

Respondents indicated several tech-related focal points for the year ahead, ranging from integrating vendors into their systems to digitizing initiation processes. Notably, integration with systems like Workday and the implementation of HR transformation technologies like ServiceNow represent key initiatives.

When respondents considered the administration of their global mobility program, the areas of technology they deemed to be most critical to their organization included:



the future impact of AI

A significant 57% of respondents foresee the potential of AI to positively influence global mobility programs. While respondents acknowledge its role in creating efficiencies and delivering predictive analytics, the prevailing sentiment aligns with the belief that AI should augment existing relocation services rather than replace the human touch. Security concerns are highlighted, yet optimism reigns as respondents envisage AI's pivotal role in cost containment, tailored policy creation, streamlined processes, and enhanced accessibility for employees and stakeholders alike.

AI continues to be an emerging technology that appears to have a higher interest level than is typical within the mobility industry. Indeed,

generative AI (GenAI¹) sessions at the [2023 WERC Global Workforce Symposium \(GWS\)](#) proved to be popular amongst the 1,000+ attendees.

looking ahead

The future of global mobility lies at the intersection of technological advancements and the human element. As we navigate this evolving landscape, leveraging technology to complement rather than replace human expertise emerges as the winning strategy.

¹Generative artificial intelligence (GenAI) can create certain types of images, text, videos, and other media in response to prompts. ChatGPT is one such example.



90%

of respondents say they are not looking for a tech-only solution

“Some managers don’t select [cross-cultural support] due to cost or the employee has been to the host country multiple times. We are increasing our awareness of the importance of cross-culture awareness for not only the employee but the entire relocating family.”

– Cartus survey respondent

cross-cultural and language solutions

It is encouraging to note that a substantial 69% of companies have embraced the significance of cross-cultural training or coaching by offering it as a required (17%) or recommended or core part of their program (52%). Further behind, 47% extend their support through language training as a required (3%) or recommended or core part of their program (44%), albeit predominantly focusing on the host country language alone (64%), with approximately 30% allowing for training in English or an additional language as required beyond the host country language.

Surprisingly, the survey also found over a fifth (21%) of respondents forego any offer of language training, while 14% overlook the pivotal role of cross-cultural training, signaling a missed opportunity in nurturing a more globally adept and culturally inclusive workforce. Cartus and many of our clients who are leaders in the DEI Mobility space reiterate the vital role of intercultural and language solutions as "anchors" within inclusive mobility programs. These leading companies' emphasis on cross-cultural transition support and intercultural management capability, coupled with language and/or communication training, paves the way for not only onboarding global talent but cultivating a more inclusive mindset that fortifies performance and taps into the diverse tapestry of an assignee population.

Cost surfaces as a prominent deterrent hindering organizations from fully integrating cross-cultural support or language training into their core benefits. The challenge of companies with limited resources and the mistaken perception that these services may not be needed if the host and home locations both speak the same language further complicates this landscape. Intriguingly, one respondent noted a lack of understanding around the profound impact of such support, which inhibits companies from embracing these services as core benefits—a compelling revelation deserving more attention and education within our corporate realms.

In exploring eligibility criteria, it is heartening to observe that half of respondents (50%) extend cross-cultural support to the entire family unit (employee, spouse/partner, and children)—a practice, in our opinion, which is widely heralded as the gold standard in our industry. Similarly, 40% extend language training to encompass the entire family, recognizing the pivotal role families play in an employee's global journey, as well as the importance of supporting children and the accompanying spouse/partner to develop confidence for communicating in a new country and new language.

This inclusivity extends further, with 16% (for cross-cultural training) and 15% (for language training) acknowledging other dependents, signaling an expanding definition of family—a reflection of the evolving dynamics within those companies that harbor more diverse employee populations.

69%

of companies have embraced cross-cultural training by offering it as a required, recommended, or core part of their program





66%

of respondents have a corporate sustainability strategy that encompasses the entire business and its supply chain

sustainability: watch this space!

Our survey also covered the emerging landscape of sustainable mobility choices within organizations. Despite this “hot topic,” 38% of respondents expressed that sustainable mobility options for relocation programs are not currently in development. Although a fifth indicated that sustainability was one of the reasons for a policy review or redesign this year, when we asked about sustainability strategies within mobility programs, a significant 62% admitted to not having one, coupled with a lack of engagement in sustainability metrics or initiatives. However, on a broader scale, two thirds have a corporate sustainability strategy that encompasses the entire business and its supply chain. Cartus is no exception to this, having committed to the pursuit of science-based emissions reduction goals encompassing both our operations and those of our supply chain.

Respondents’ feedback mirrors many of the points we heard at our live Cartus session at the 2023 WERC GWS event, “Turning positive ESG intentions into mobility outcomes.” With over 100 HR and mobility professionals in attendance, we found that while an increasing number of businesses are developing

sustainability goals and priorities, the translation of these priorities into tangible actions and services for mobility teams is in the early stages for many. However, it remains an area we can expect to see increased innovation and focus to meet the engagement and preparation required to meet future compliance needs.

“With many aligned on the value of sustainability, we are reaching a moment of great opportunity for mobility programs to embrace innovation and begin to explore both immediate and longer-term actions, which support mobility as a positive contributor to organisations’ overall ESG performance, optimising how we support employee moves rather than having to reduce volumes to achieve emissions reductions goals, or becoming reliant on offsetting alone.”

- Andy Conduit-Turner, Director, Sustainable Growth Enablement, Cartus



repatriation integration training



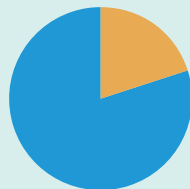
Navigating the complex terrain of global assignments involves more than just the initial deployment—it is about crafting a seamless journey from start to finish. Yet our survey uncovered a staggering statistic: a mere 21% of respondents prioritize repatriation integration training for returning assignees. This critical phase often remains an untapped opportunity for companies striving to maximize the returns on their global mobility investments. Ensuring a more formal repatriation process is in place allows companies to not only demonstrate their commitment to their employee through end-of-assignment support but to identify the new ways said employee may contribute to the organization with new skills and knowledge.

Interestingly, over a fifth of respondents—22%, to be precise—reported one of their top challenges for 2024 was trying to calculate mobility ROI (return on investment). It is here that the significance of repatriation emerges as a linchpin in the mobility ROI equation.

The [EY 2023 Mobility Reimagined Survey](#), drawing insights from over 1,000 global mobility professionals, found that strategic integration of mobility within the broader talent strategy may be the catalyst for unlocking positive returns on investment. Companies that seamlessly weave mobility into their talent strategies gain a competitive edge in the global talent race.

How we support employees as they conclude their assignments and transition back into their home location or move onto the next role matters profoundly. It is not just about the relocation itself but what happens in the short and long-term following their return that can dictate the overall success of an assignment. The ability to articulate newly developed competencies and experiences and apply them to the next phase of their career and in their personal life is where ROI is most likely to happen for the assignee and the company.

22%
of respondents



reported one of their
TOP CHALLENGES
for 2024 was trying to calculate



MOBILITY ROI
(return on investment)



looking ahead

The year 2024 marks a critical juncture for organizations to realign mobility strategies with evolving global landscapes. By prioritizing cost management and employee experience while also addressing rising challenges innovatively and efficiently, businesses can navigate the ever-changing talent mobility terrain with success.



For more advice and recommendations on your mobility programs, email cartussolutions@cartus.com or visit [cartus.com](https://www.cartus.com).



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