global talent mobility survey 2024

large relocation programs: trends summary

Our Global Talent Mobility Survey Report 2024 is a comprehensive exploration into the dynamic intersection of macroeconomic challenges, employee experience, and the ever-evolving landscape of global mobility strategies. With the final report out now, we have taken a deep dive into specific mobility program sizes—including large programs—to see what the data tells us.

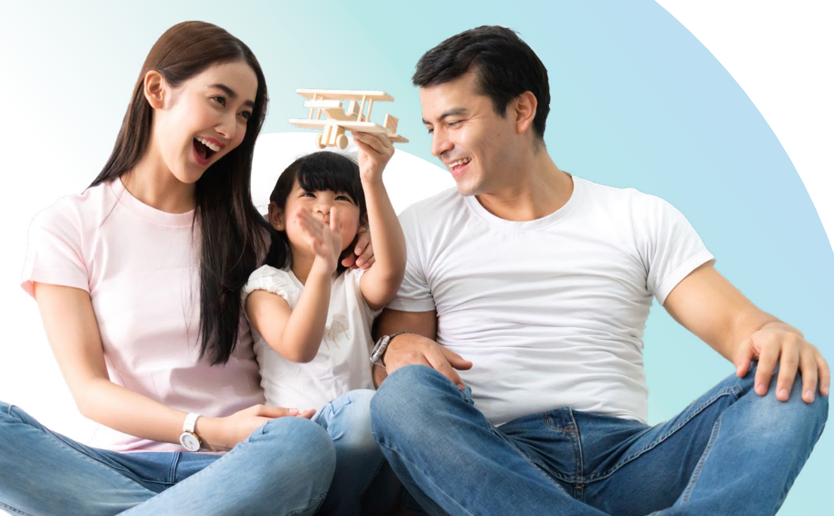
FOLLOWING ARE KEY FINDINGS FROM 30 RESPONDENTS WHO MOVE MORE THAN 500 EMPLOYEES ANNUALLY FOR EITHER DOMESTIC (INTRA-COUNTRY) NON-US RELOCATION OR INTERNATIONAL (CROSS-BORDER ONLY) PROGRAMS:

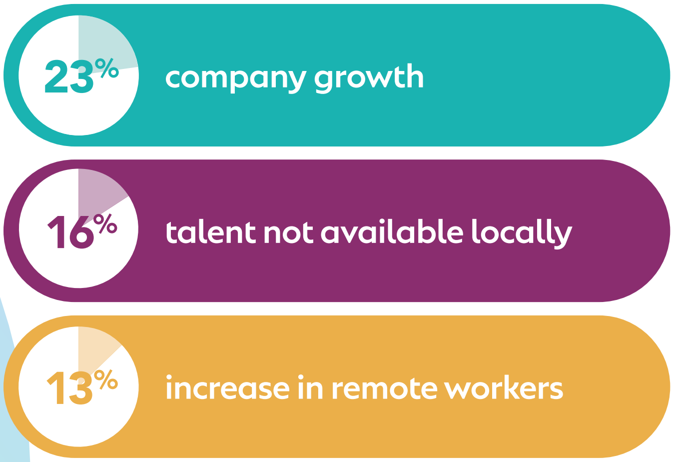
mobility volume and key drivers

Nearly half of respondents with large relocation programs (47%) reported an increase in their mobility activity, which is a similar experience to the total survey respondents (44%).

Company growth (23%) was the most common reason for increasing mobility activity, which implies a need for expanding into new markets, acquiring new customers, or launching new products or services. Talent not available locally (16%) was the second most cited driver for rising volume, and an increase in remote workers (13%) ranked third, which indicates a shift in the way work is performed and delivered, as well as a potential opportunity for enhancing employee flexibility and satisfaction.

Interestingly, 40% of this respondent group said that they have seen a decline in activity in the last two years, which is 10 percentage points more than the overall survey. The key driver for this volume decrease was cost containment strategy with over half (52%) indicating as such.





How do you foresee Artificial Intelligence (AI) impacting your global mobility program in the future?

> “There is huge opportunity to utilize AI for education and communication purposes.”
>
> “As an optimization tool for the internal mobility team’s administrative tasks.”
>
> “Better data management and forecasting.”
>
> “Too early to assess.”

anticipated move-types for 2024

1. Intra-country moves
2. International short-term assignments
3. Business traveler

It is notable that international *long-term* assignments were ranked second in the overall survey yet fifth by this group of respondents. While long-term assignments remain a staple, some companies with larger programs are more focused on revamping talent acquisition strategies to grow current talent, increase employee engagement, and attract qualified domestic talent, which can be more cost effective.

lump sum

Lump sum moves were considered a priority for 47% of respondents—nine percentage points higher than the main survey.

47% **said lump sum moves were a priority** (9% up from main survey)

We also asked survey participants to indicate which employee-level receives a lump sum when relocating and found some interesting differences in how these two groups—companies with larger relocation programs and all survey respondents—answered the question:

employee-level receiving lump sum	companies with larger programs	full survey respondents
senior employees	18%	36%
mid-level employees	32%	72%
entry-level employees	27%	72%
interns	23%	49%

The larger-program companies tend to offer lump sum benefits to a lower percentage of their employees than the full survey respondents. This is especially noticeable for the mid-level and entry-level employees, where the difference is 40+ percentage points. This suggests that the larger-program companies may have more stringent criteria or policies for granting lump sum benefits, or they may prefer to provide more tailored benefit options.

mobility priorities vs. challenges

2024 mobility PRIORITIES	
large relocation programs	**full report**
1 a more flexible approach to mobility (e.g., core/flex, tiered policy)	1 improve in-house mobility processes and optimization
2 improve the employee experience	2 improve the employee experience
3 improve in-house mobility processes and optimization AND investment in technology to support the mobility team and reporting	3 a more flexible approach to mobility (e.g., core/flex, tiered policy)

2024 mobility CHALLENGES	
large relocation programs	**full report**
1 rising mobility costs	1 rising mobility costs
2 achieving a more flexible approach AND tax and compliance	2 meeting relocating employee expectations
3 Macroeconomic pressures	3 achieving a more flexible approach AND tax and compliance

This respondent group's priorities and challenges are mostly the same as the full report findings, except for two differences: For priorities, technology investment for the mobility team and reporting was third for this group but seventh in the overall survey. This could be because companies with larger assignee populations typically have more complex moves, which require a greater need for technological tools to support program delivery, including reporting.

Also, macroeconomic pressures was third for this group but seventh in the overall survey, which may be due to this group having large, global programs that are more affected and influenced by the macroeconomic environment.

cost management

The majority of respondents (97%) reported that their organization's focus on cost control was either higher this year than the last two years or unchanged.

Respondents are considering the following methods to reduce costs in their global mobility programs:

1. Administering process improvements
2. Restructuring or redesigning policy
3. IT enhancements/integration

Perhaps showing ongoing commitment to the global mobility function, 77% indicated that their relocation budgets had not changed compared to the previous year—although 20% did indicate their budget had declined.

policy review and redesign

One of the topics covered in the survey was the frequency and intention of policy review and redesign. The data reveals that 40% of respondents usually evaluate their mobility policies every one to two years, which matches the frequency reported by most of our full report survey takers across all program sizes. An additional 30% only review every three to four years.

73% considering policy review (11% up from main survey)

For 2024, 73% of this respondent group were considering a policy review, which is 11 percentage points above what was reported in the completed survey. Reasons for considering a policy review include:

- Employee experience
- Flexibility
- Cost

hybrid, extended business travel, and remote worker moves

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 (e.g., employee travels from the UK to France to work from their Paris office for an extended 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 (e.g., an employee based in the US wants to work from Spain for two months during the summer).
- **Work from home:** Everyone works at their place of residence.

More than half (53%) of respondents have international remote workers, tracking closely against the 57% who reported as such in the full report. Most respondents (77%) do not offer any company-sponsored benefits to these employees. Those that do offer benefits provide compliance support and immigration services.

international compensation services

Our **Global Talent Mobility Survey 2024** also asked about the administration of international assignment compensation services. The majority of respondents were evenly split between partnering with a relocation management company (40%) and managing compensation services in-house (40%).

Respondents with large relocation programs appear to have a more outsourced model for managing the tax aspects of their international assignments, with 37% working with a tax provider and 20% partnering with a relocation management company.

flexible mobility

When discussing demand for more flexibility in mobility programs, 63% of respondents reported a rise. Key drivers for a more flexible approach to mobility were the same as those identified in the full survey report:

1. Changing employee expectations
2. Budget constraints/macroeconomic environment pressures
3. Changing employee needs

In this group, 46% of respondents with core/flex programs said that flex benefits were chosen by the relocating employee. This is twice as many as those with small-to-midsize programs (companies relocating less than 100 employees annually), which may be because organizations with larger relocation programs have more targeted DEI and engagement strategies, which likely drive the employee choice decisions.

mobility DEI

Cartus data shows how respondents have different levels of success in making their global mobility programs more diverse, equitable, and inclusive (DEI). Encouragingly, 20% of respondents in this group identified as leaders in the DEI mobility space, compared with only 12% from the overall survey.

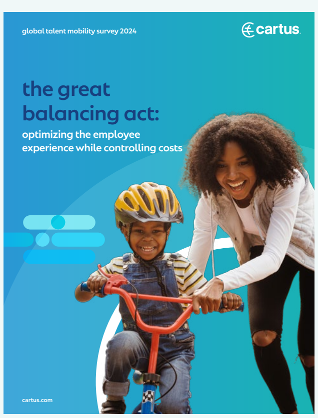
Almost half (43%) said they are making progress and 17% were just getting started. When asked what diversity groups their global mobility team want to learn more about in the next year, 38% of respondents said all kinds.

sustainability

Most respondents (67%) said their organization has a business-wide sustainability strategy that covers their supply chain, similar to the full report (62%). However, more than half (53%) reported no involvement in sustainability metrics or initiatives, and another 61% did not know the sustainability metrics or certifications their company uses.

Many businesses are setting sustainability goals and priorities, but turning these priorities into practical actions and services for mobility teams is still a new process. However, this is an area where we can anticipate more innovation and focus to meet the engagement and preparation needed for future compliance requirements.

Fun fact: Cartus serves more than a third of the Fortune 100.



read our full report!

Drawing global insights from 138 respondents across diverse industries, our **Global Talent Mobility Survey Report 2024** unravels the intricate balancing act of dichotomies that define the current corporate relocation landscape. 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 a 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.

Pressed for time? Catch the survey highlight reel **here**.

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