

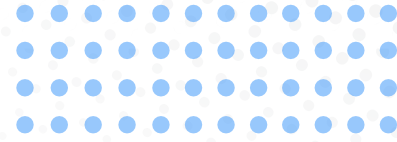


## **2025 Global Mobility Benchmarking Survey EMEA**

Essential data on relocation costs, policy inclusions, strategy, and delivery models from over 100 companies, to guide leaders and their companies in their ongoing mobility strategy.



# TABLE OF CONTENTS



<b>01</b>	INTRODUCTION -----	03
<b>02</b>	FOREWORD -----	04
<b>03</b>	PERCHY TOP PICKS -----	05
<b>04</b>	METHODOLOGY -----	07
<b>05</b>	KEY FACTORS AFFECTING POLICY -----	11
<b>06</b>	POLICY INCLUSIONS -----	13
<b>07</b>	LOOK FORWARD TO 2025 -----	20
<b>08</b>	THANKS TO OUR SPECIAL CONTRIBUTORS ---	24
<b>09</b>	INTRODUCING PERCHPEEK -----	25





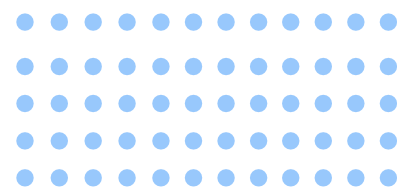
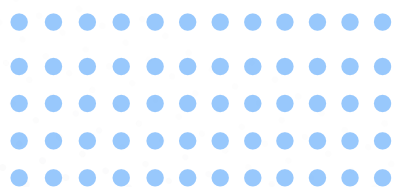


## INTRODUCTION

In the rapidly evolving landscape of global mobility, staying abreast of industry benchmarks is crucial for leaders seeking to refine their relocation policies.

More than 50% of business and relocation leaders believe that relocation volumes are going to increase in 2025, and over half of all companies say that getting better Mobility data is a key objective for their company in the next year.

This 2025 Benchmarking Survey will empower Global Mobility, HR, and C-Suite Executives to align their relocation strategies with the latest developments, ensuring competitiveness and preparedness for 2025's challenges and opportunities.



# FOREWORD



**PAUL BENNETT**  
CEO, PERCHPEEK



In a rapidly changing environment, the Global Mobility (GM) landscape is evolving, positioning relocation as a core pillar of talent strategy. Following a challenging 2022-2023, there's a renewed "buzz" in Mobility, with rising corporate relocation volumes signalling an end to hiring freezes and a focus on talent acquisition. It's super exciting to see Mobility shifting from a tool for senior staff to a strategic solution for addressing talent shortages across all levels, and how that's prompting a re-examination of relocation policies for inclusivity.

Cost reduction is now a key priority for GM leaders, with half aiming to cut costs next year. This is being achieved often through increasing use of flexible policies, as well as streamlining through tech. As GM's strategic role grows, it is increasingly integrated into a company's People strategy, and this is emphasizing a need for clear ROI metrics and long-term goals. Data enhancement is therefore a top priority, with over 60% of companies focusing on improving their data capabilities, necessitating a cultural shift toward a technology-driven model.

External challenges, such as stiff housing competition and rising shipping costs, highlight the inadequacies of outdated relocation policies. Standardized packages are insufficient to attract diverse talent, leading prospective hires to decline offers due to inadequate support. With less than 50% of companies including shipping in their main policies, there's a clear need to move away from traditional packages. This goes hand-in-hand with companies seeking more diverse and flexible relocation services, empowering employees to tailor their experiences through self-service technology and a broader range of vendor options.

The future of Global Mobility is both challenging and very promising! We're seeing first hand that clients are having more impact than ever for their companies, aligning relocation strategy with HR goals and enhancing Mobility's role in talent management and retention. We must commit to making relocation support accessible, personalized, and inclusive, tailoring packages to individual needs to maximize GM's long-term impact. By leveraging technology and data analytics, we can transform the relocation experience and improve workforce well-being.

I invite you to explore the insights in this report and join us in shaping the future of Global Mobility for the benefit of organizations and employees alike. It's a super exciting time to be in Mobility - I hope these insights help you prepare for a big year ahead!





# METHODOLOGY

This benchmarking report is based on a global survey of 110 HR and Mobility professionals from companies with at least 500 employees. It focuses specifically on insights from leaders whose primary relocation cases involved permanent transfers to the EMEA region.

## The industries

Respondents were from an array of sectors, including

- Banking & Financial Services
- Information Technology
- Energy
- Defense
- Non-profit
- Telecommunications
- Food & Beverage
- Entertainment
- Consumer Goods
- Healthcare
- Education
- Manufacturing & Retail



## POLICY GLOSSARY

**Managed Policy** - Relocators are given a fixed suite of pre-determined relocation services (such as immigration, temporary accommodation, long-term home-finding)

**Cash Lump Sum** – Instead of relocation services, relocators are given a set cash amount (either in advance or through payroll reimbursement) to support their relocation

**Core Flex** – Relocators are given some essential “core” services, plus a “flex” budget amount (either in a cash budget or points format) which they can direct towards services/purchases of their choice

**Managed Cap** – Relocators are given a fixed budget that they can spend on a fixed selection of relocation service categories

# PERCHY TOP PICKS



## Some of the standout takeaways from the data!

### Going flexible

Many companies report that introducing flexibility in their relocation policies has been their best decision of the past 12-24 months. While fully managed policies remain common, flexible options like Core Flex or Managed Cap are now more prevalent than lump sums, thanks to their cost and performance benefits. Relocation leaders should feel within their rights to push their providers for flexible solutions that enhance experiences while saving costs—flexible policies should lower relocation expenses without sacrificing quality.

### Growing Mobility as the strategic talent lever

Permanent transfers are now the most common relocation type, used by 97% of companies, surpassing traditional temporary assignments. This shift highlights the growing role of relocation in talent sourcing and attraction. As Mobility becomes more integral to the talent strategy, it's crucial to stay close to the data and trends of the wider GM industry, and to collaborate with Talent and Development teams to enhance influence and career growth.

### Data is a top priority

Companies rank data enhancement among their top three priorities. A lack of good data often hampers business buy-in for Mobility. A solid Mobility strategy relies on accessible data, and with more low-cost data products available, this information is becoming easier to obtain. In 2025, providers should be expected to deliver clear data on basic relocation trends like costs or satisfaction.

### Budgets are hurting, and Mobility are responding

As economic pressures mount, Mobility teams are feeling the strain to reduce relocation costs, especially in larger companies. There can be a lot of value in addressing this with partners; one Global Mobility leader discovered their long-term immigration partner was charging 300% above market rates after reviewing alternatives.



# PERCHY TOP PICKS



## Looking to implement Self Service

While AI wasn't highlighted as a key action, there's a growing interest in self service capabilities- which can enhance experience and lower costs of relocating younger, digital native relocators.

## Standard policy costs are now well below traditional benchmarks

The survey revealed median relocation policy values of \$15,000 for smaller companies and \$25,000 for global enterprises, significantly lower than traditional costs ranging from \$19,000 to over \$100,000. Mobility leaders should regularly assess their policy inclusions and market service costs, challenging providers that don't align with current benchmarks.

## Competitive advantage through relocation support for younger populations

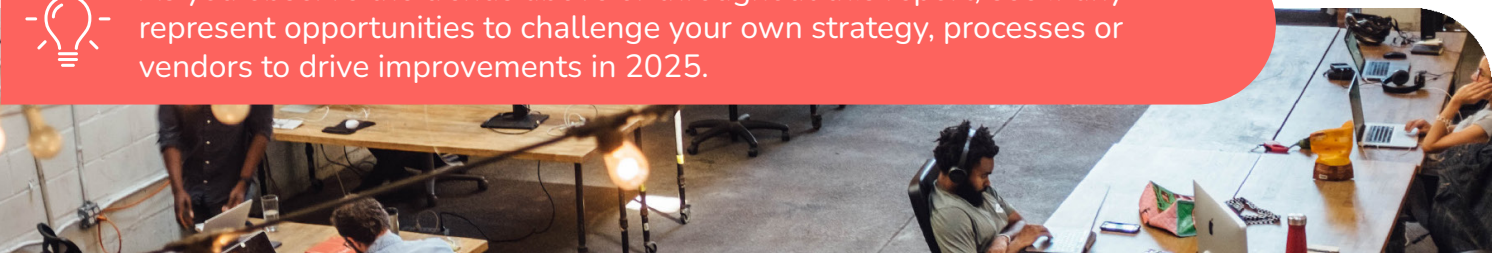
Companies want to support a wider range of relocators, from interns to C-suite executives, but many struggle to assist early-career relocators. This gap is linked to an increasing demand for cost-effective, tech-friendly self-service tools, and Mobility leaders not currently supporting this demographic effectively should explore the new improving capabilities that are now in market.

For Mobility leaders that aren't currently providing support to this population - learn more about nuances and best practices here:

### PerchPeek Article – The Best Policies For Relocating Graduates



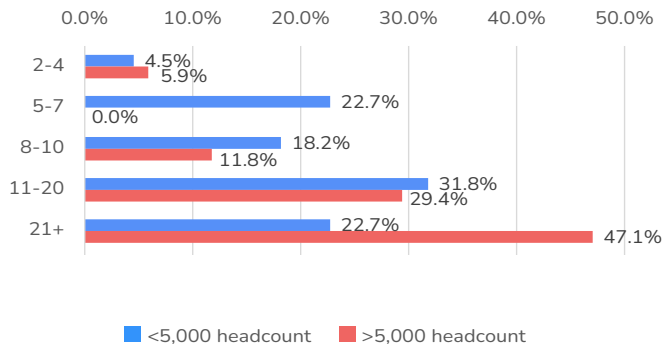
As you observe the trends above or throughout this report, see if any represent opportunities to challenge your own strategy, processes or vendors to drive improvements in 2025.



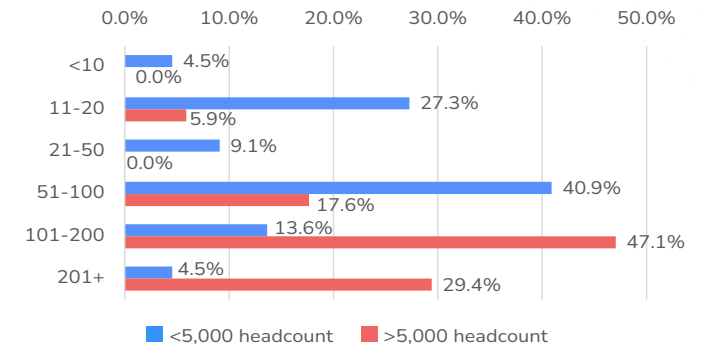
# Basic policy info

In the range of companies surveyed, operating country counts ranged from 2 to >21 countries, relocation volumes range from <10 to >200 annual relocation, and total number of policies ranging between 1 and >21 policies.

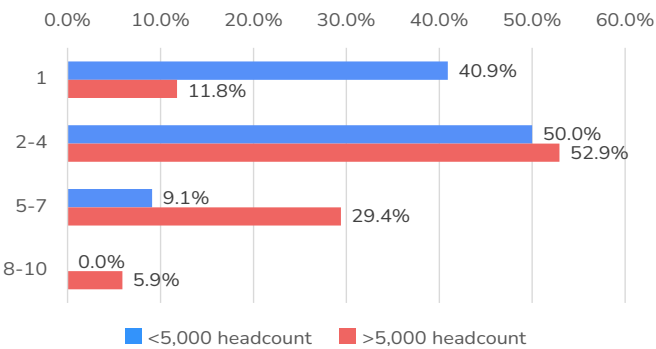
## How many countries does your company have employees in?



## Roughly how many relocations occur at your company each year?



## How many different global mobility (relocation) policies do you have?

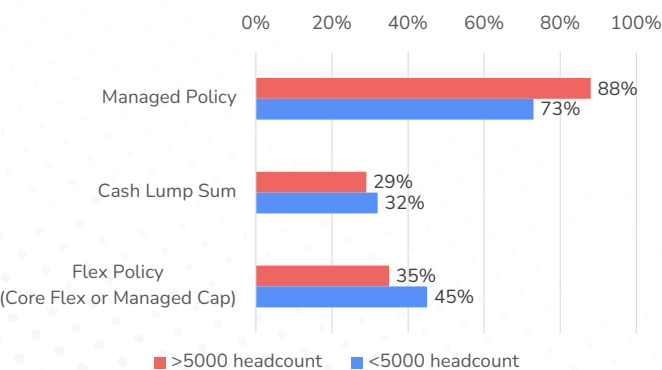


## Policy types

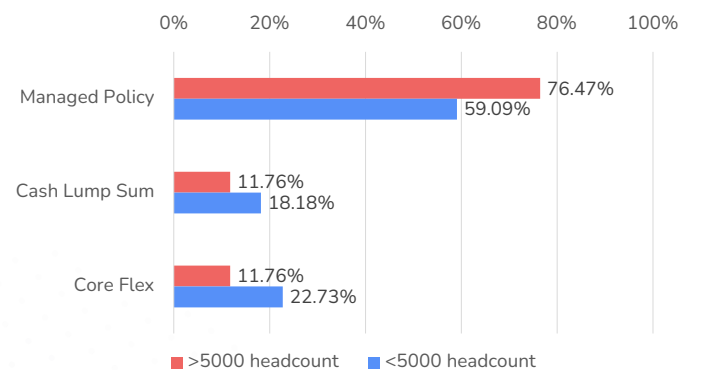
Traditional, fully managed policies are the most popular, especially in larger companies (over 5,000 headcount). Flexible policies, such as Core Flex or Managed Caps, that provide some guidance or specifications on where budget can be spent, but allow relocators a lot more freedom than Managed policies, were second most likely to be included.

Where flexible policies were the main policy type used, it was a Core Flex policy.

## What kind of relocation policies do you have?



## What is your most common policy type right now?





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At Databricks we are moving away from fully managed and increasingly towards either lump sum or core flex depending on move type, this is echoed across the industry as well.

Soren Sturup-Toft

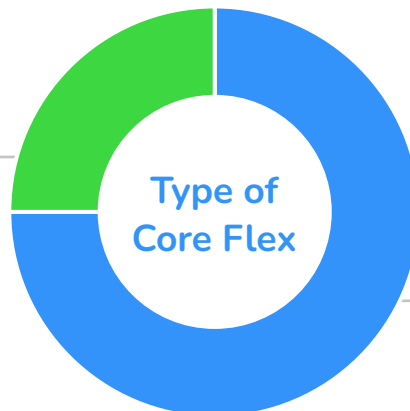
Immigration and Global Mobility Lead EMEA & APJ, Databricks



If you have questions about how to effectively implement high quality flexible policies without compromising quality, feel free to reach out at [info@perchpeek.com](mailto:info@perchpeek.com)

Of companies that stated that Core Flex was their most common policy type, a cash-budget was more common than a points-based system:

25%  
Points based



75%  
Cash Budget

### A growing influence of flexible policies, especially in smaller enterprises

Companies were equally as likely to transition to Core Flex in the last 2 years as they were to start using fully managed policies. Flexible policies were particularly common for companies of under 5,000 headcount.

Of companies that transitioned to new policy types in the last 2 years:

45%  
moved to  
Core Flex

45%  
moved  
to Fully  
Managed  
Policies

9%  
moved to  
Cash Lump  
Sums

For companies <5,000 in size that moved to a new policy in the last 2 years

50%  
moved to  
Core Flex

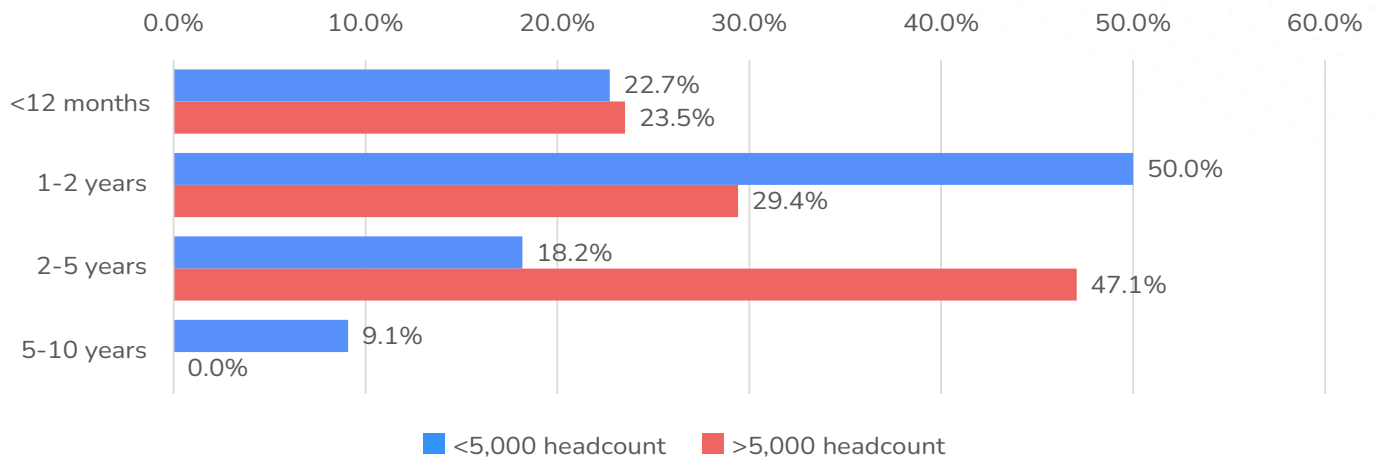
30%  
moved to  
Full  
Managed  
Policies

10%  
moved to  
Cash Lump  
Sums

# How Often Are Policies Reviewed?

A broader view of policy review frequency highlighted the tendency of smaller (<5,000 headcount) companies to review their policies more frequently than larger enterprises

## How often are companies reviewing their policies?



Companies of **<5,000 headcount (73%)** were more likely to review their policies every 2 years than companies of **>5,000 employees (52%)**.

**23%** of companies reviewed their policies at least every 12 months

**64%** of companies reviewed their policies at least every 2 years.

**94%** of companies reviewed their policies at least every 5 years.

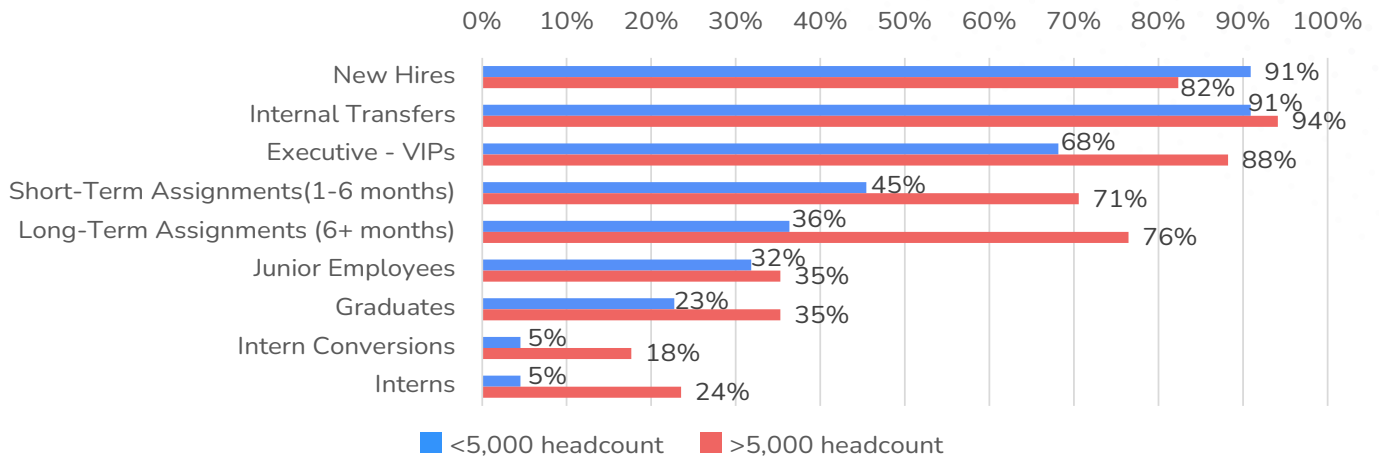




# KEY FACTORS AFFECTING POLICY

## Who gets supported?

Which types of relocators does your company provide support for?



- The most commonly supported cohorts overall are those relocating permanently (internal transfers and new hires). Internal transfers were supported by 91% of companies with 5,000 headcount, whilst new hires received support for 91% of companies with 5,000 headcount.
- Temporary assignments were less commonly supported, especially in smaller enterprises – of companies with <5,000 headcount short term assignments were supported by only 45%, and long term assignments supported by only 36%.
- Executive or VIP relocations were very common, and more so in larger companies (88%) than smaller companies (68%).
- Companies of all sizes are currently far less likely to offer relocation support to junior employees, graduates and interns. This may in some cases be due to a prioritization of investment towards more senior or more tenured, however a significant portion of Mobility leaders do not see an adequate solution in market that serves early careers relocators due to their lower budgets

“

*This survey result presents an opportunity for greater alignment between Global Mobility and Graduate teams talent philosophy. Whilst cost is an important consideration as to why relocation support is not offered to early talents by many companies, the rewards gained from a great onboarding experience as a long term retention strategy are invaluable. With the growing capabilities of lower cost, tech-enhanced solutions, Mobility teams should be looking to adjust their approaches for these relocators and drive this initiative forwards.*

**Frank Belmonte**

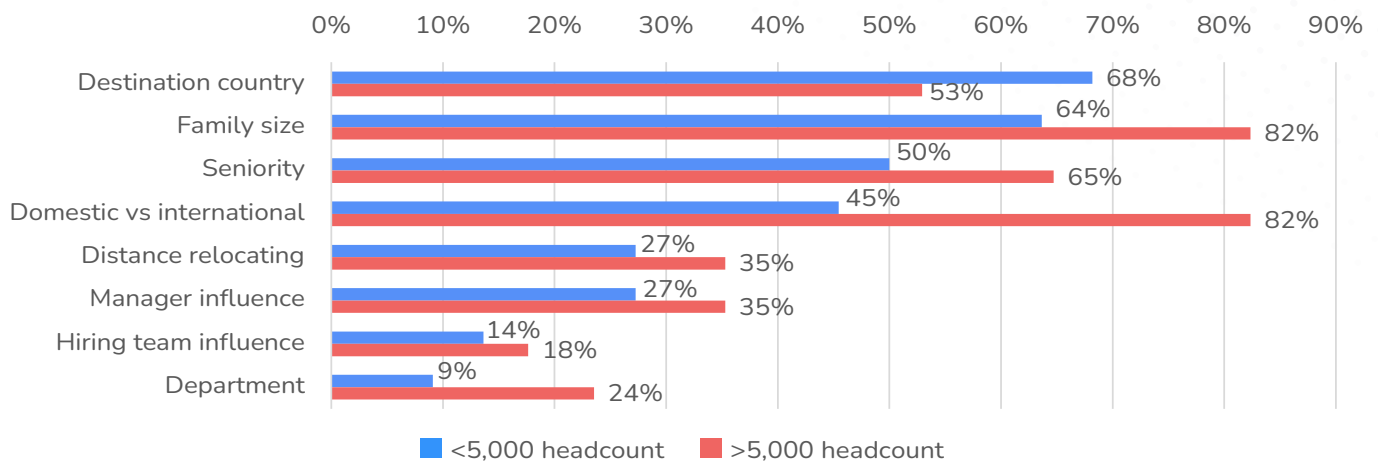
Global Mobility Program Manager, Red Hat



If you'd like to learn about how to optimise relocation policies for Graduate relocations, see PerchPeek's article [here](#)

# What do relocator packages depend on?

What factors determine the value of the relocation package offered to a relocator by your company?

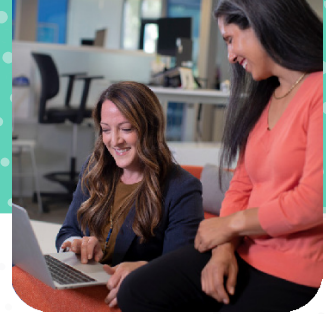


- **International relocators and larger families receive more support.** More than 80% of companies adjust policy for international relocations, while more than 70% adjust it if dependents are involved. Family size was more likely to be taken into consideration in the largest companies.
- **Smaller companies are less likely to base packages on department and seniority,** while larger companies of >5,000 headcount take seniority and department/function under consideration more often.
- **The destination country is significant,** in particular, for smaller companies- reflecting the higher likelihood of larger companies to build global, centralised policies.
- **Larger companies were more likely to have a different policy for domestic and international relocators** - reflecting their higher volumes of relocators and the likely higher variety of relocation cases.
- **Managers and hirings team have some influence.** Relocation packages are impacted by either hiring team or manager influence in 41% of larger companies and 32% of smaller companies.



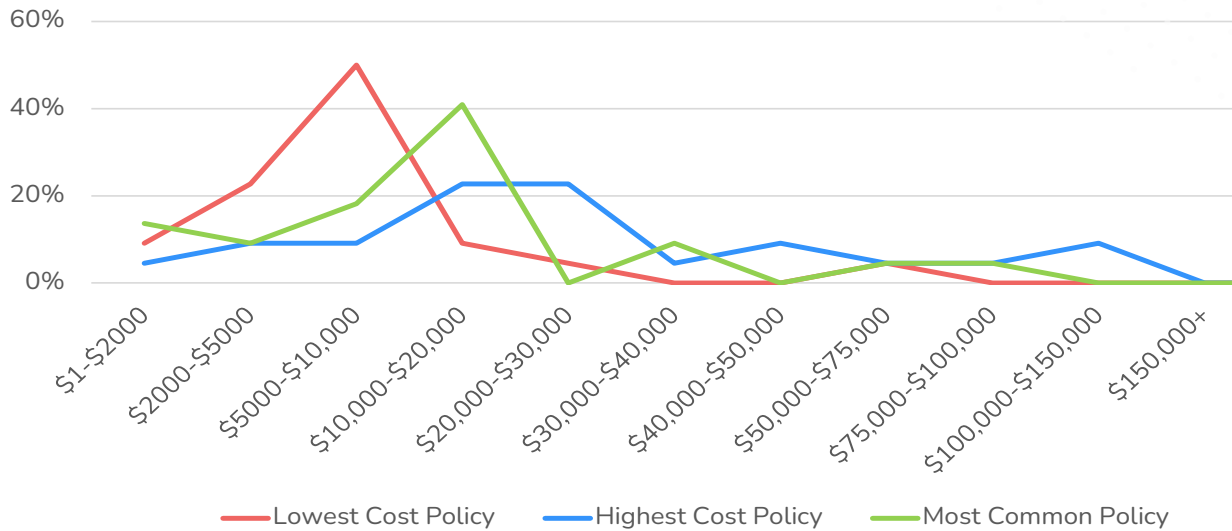


# POLICY INCLUSIONS



## How Much Do Relocations Typically Cost?

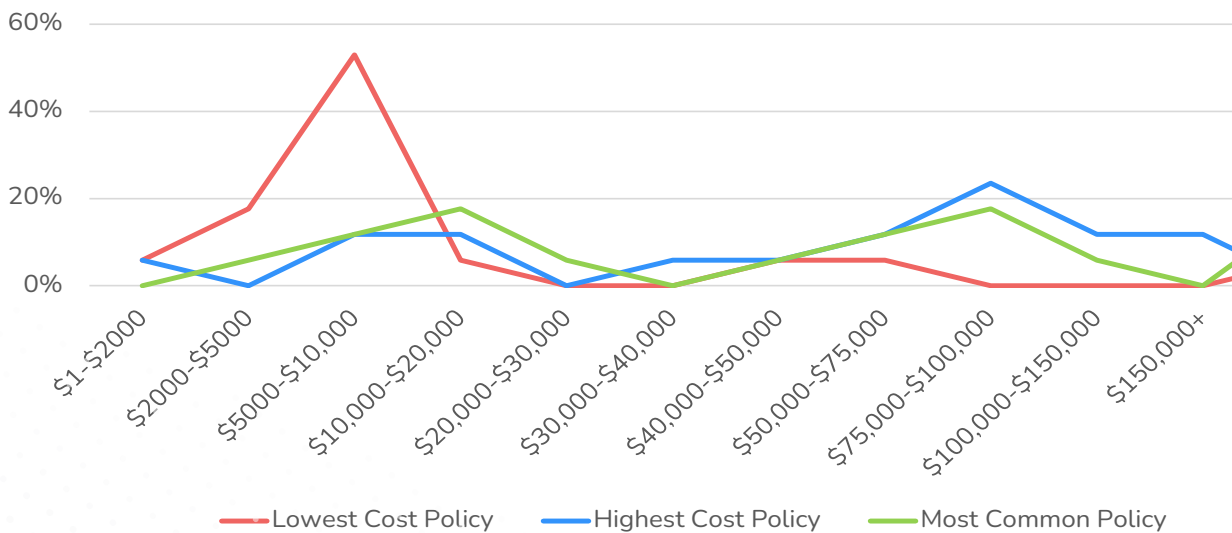
How much does it roughly cost? (excluding immigration)  
 < 5,000 Employees



**For companies of under 5,000 employees:**

<b>Lowest Cost Policy Median:</b> \$5,000-\$10,000	<b>Most Common Policy Median:</b> \$10,000-\$20,000	<b>Highest Cost Policy Median:</b> \$20,000-\$30,000
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How much does it roughly cost? (excluding immigration)  
 >5,000 Employees



**For companies of over 5,000 employees:**

<b>Lowest Cost Policy Median:</b> \$5,000-\$10,000	<b>Most Common Policy Median:</b> \$50,000-\$75,000	<b>Highest Cost Policy Median:</b> \$50,000-\$75,000
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There is a significant increase in the values of relocation packages as companies get larger.

- The lowest cost company relocation packages were consistent across the board, ranging from below \$2,000, but predominantly in the \$5,000-\$10,000 region for most companies.
- The highest cost relocation packages varied greatly with company size. Companies with employee headcounts of under 5,000 had a median highest package of \$10,000-\$20,000, whilst for companies of over 5,000 employees, the median highest relocation package was in the \$50,000-\$75,000 range.
- The median most common relocation package for smaller companies was \$10,000- \$20,000, for the largest companies the median most common package was also in the \$50,000-\$75,000 range



*Global Mobility programs have expanded from mainly focusing on international assignments of existing, executive, employees towards supporting non-executive new joiners, who's primary motivation for relocating is a better life rather than the business assignment or job itself.*

*We're seeing leaner, one-way relocation programs as a result of this; they reflect the common interest of both employee and company, they allow for high volumes of relocations at scale (as we see more cases), and common inclusions of temporary assignments, such as tax filing and repatriation costs are usually not included.*



**Michali Henig**

*Head of Global Mobility and Travel, HelloFresh*

## Industry Focus

The highest relocation packages were seen in Banking & Financial Services & Energy sectors, whilst Information Technology and Consumer Goods offered the lowest relocation support packages.

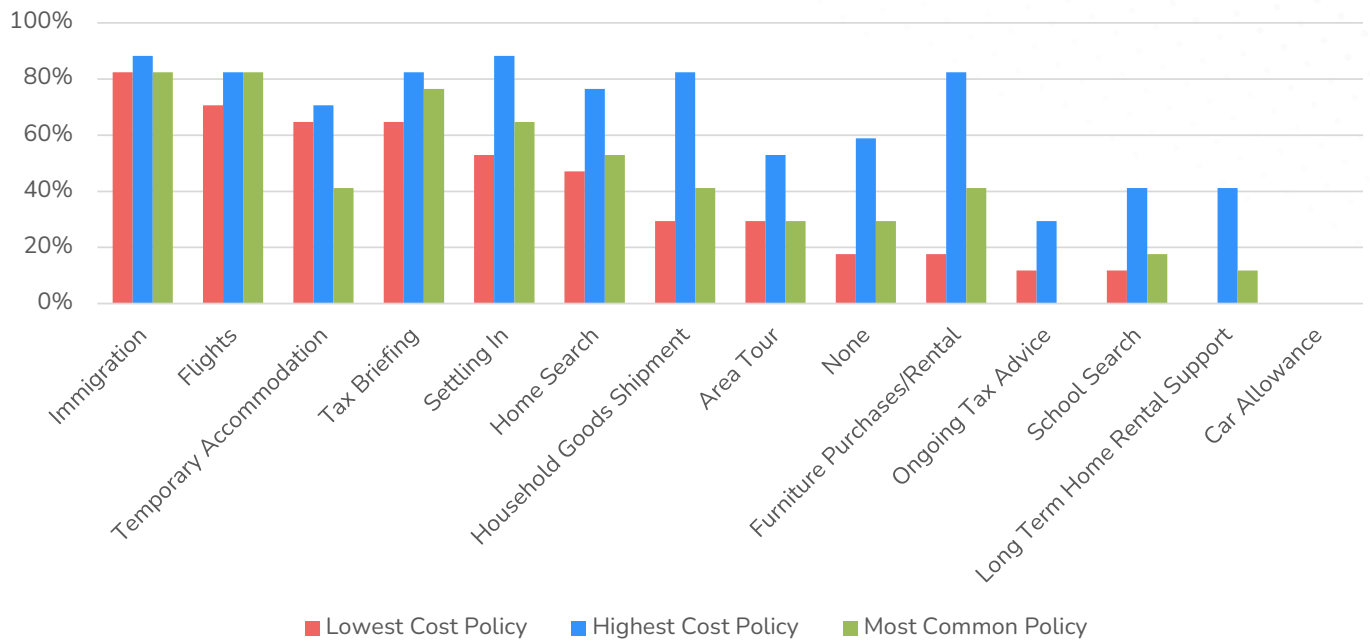


If you seek more detailed information on a specific industry's benchmark data, please reach out at [info@perchpeek.com](mailto:info@perchpeek.com).

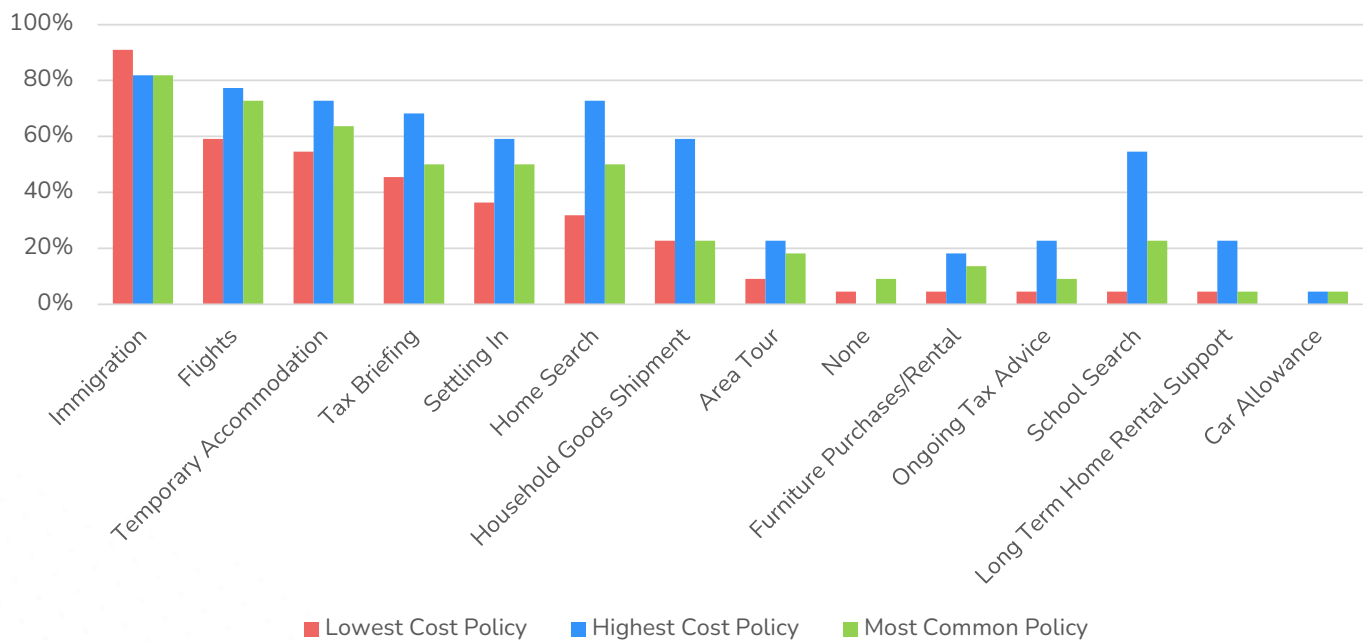


# POLICY INCLUSIONS

What services are usually included?  
 <5,000 Employees

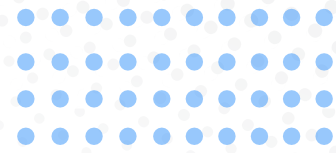


What services are usually included?  
 >5,000 Employees

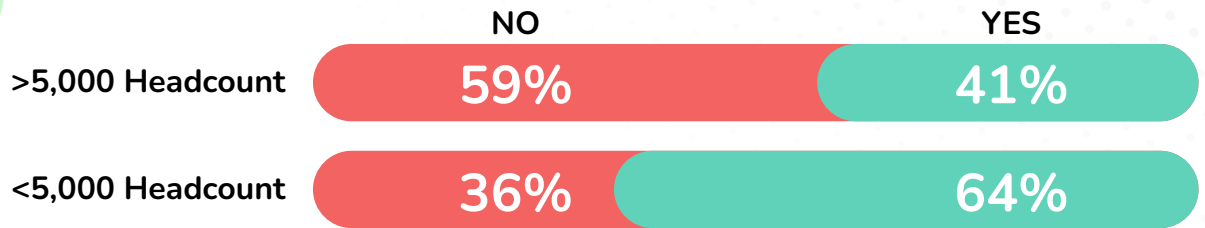


If you are finding your policy costs or inclusions are out of line with the above benchmarks, or you're looking to reduce costs, challenge your vendors or other vendors for market data on specific service costs, and review the overall benefits to your relocators, and whether that money would be better spent elsewhere. If you can't get good data, feel free to reach out to PerchPeek and we can help!

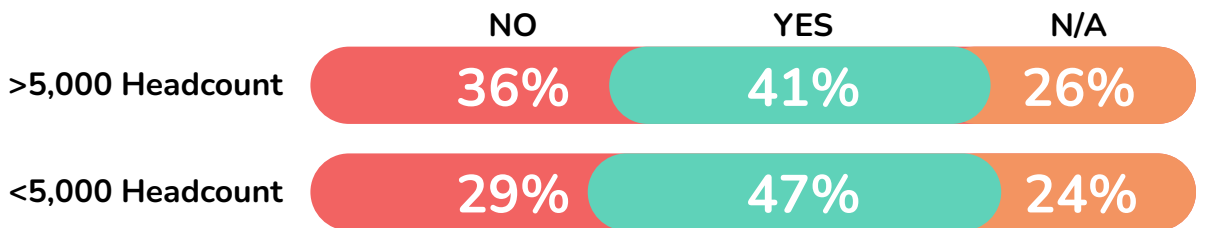




## Do companies put limits on individual relocater costs?



## Do companies put local cost limits on temporary accommodation?



- Most common packages are likely to include the essentials of Flights, Immigration, Temporary Accommodations and Settling In, but are unlikely to include Tax Support, Area Tours or Long-Term Home Rental Support.
- Besides these core elements, Home Search and Settling In were the next most likely to be included
- In the lowest packages, Flights were likely to be included, but Temporary Accommodation was only included in the lower package at 65% of companies, implying that a significant proportion of lower budget relocators have to cover the vast majority of the relocation costs themselves, as only the travel (and immigration where necessary) is covered.
- In the highest cost packages, Tax Support, School Search, Shipping, and Settling In services are all commonly included. Services like Area Tours, Ongoing Tax Advice, and Long-Term Home Rental are more likely to be included.
- Shipping is included in fewer than 30% of lower cost packages. More companies now offer alternatives to shipping than those that do not, reflecting a shift away from when shipping used to be included as one of the main services in a relocation.



*The uptake of household goods shipments has dropped dramatically over recent years. Soaring costs and wait times for deliveries are heavily impacting demand from Mobility teams, whilst the implementation of flex policies in place of “use it or lose it” setups has led to many relocators themselves selecting alternative options to shipping.*

**Hellie Kellett-Clarke**

Head Of Operations, PerchPeek

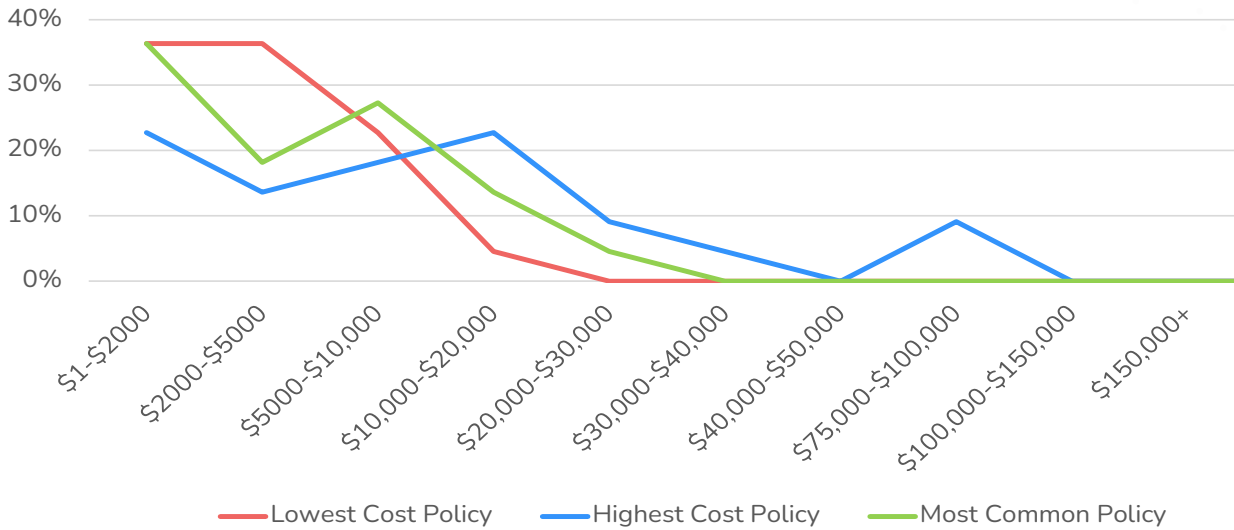


# Lump sum bonuses or flexible allowances

Respondents were asked about the value of additional flexible allowances or bonuses they give to relocators alongside relocation services.



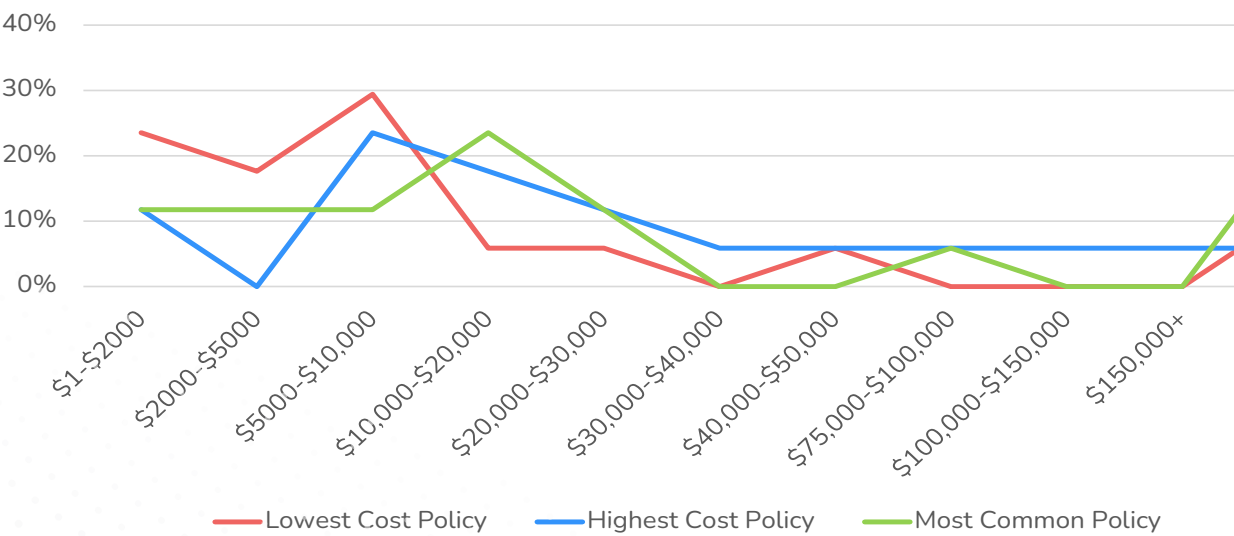
What value is the flexible (cash or points) allowance? <5,000 Employees



**For companies of under 5,000 employees:**

Policy Type	Median Bonus Range
Lowest Policy Flexible/Cash Bonus	\$2,000-\$5,000
Most Common Policy Flexible/Cash Bonus	\$2,000-\$5,000
Highest Policy Flexible/Cash Bonus	\$5,000-\$10,000

What value is the flexible (cash or points) allowance? >5,000 Employees

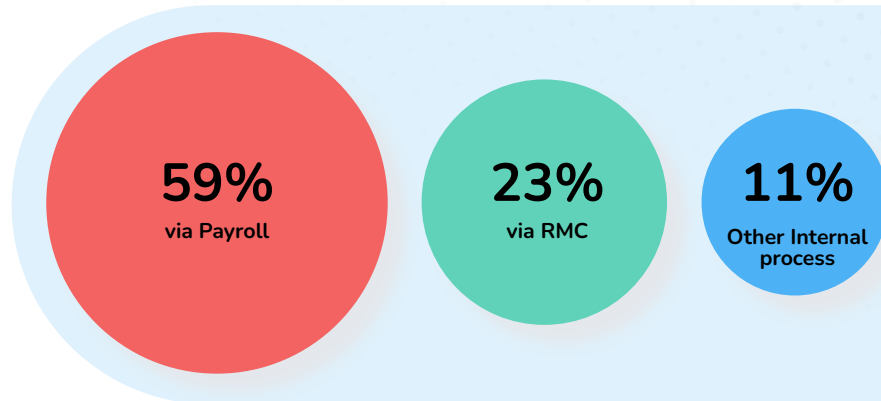


**For companies of over 5,000 employees:**

Policy Type	Median Bonus Range
Lowest Policy Flexible/Cash Bonus	\$5,000-\$10,000
Most Common Policy Flexible/Cash Bonus	\$10,000-\$20,000
Highest Policy Flexible/Cash Bonus	\$10,000-\$20,000

# Reimbursements most commonly via payroll

How do you reimburse your employee lump sums/relocation bonuses?



59% of respondents said that their company reimburses relocating employees via payroll, rather than via an RMC or other methods.

This approach can negatively impact both the company and its employees for 2 reasons:

1. Payroll reimbursements places the financial burden of upfront relocation expenses on the relocating employee—a challenge that is often more pronounced for junior-level employees and new hires who may lack the necessary financial resources.
2. Companies lose out on potential tax deductions.

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*In some countries, a company can achieve significant tax savings if they are able to track how relocation allowances are spent. For example, relocation flights or shipment of personal belongs can be treated as tax exempt if directly paid by the company or reimbursed. The problem with reimbursing via a cash allowance, is that it does not allow collection of this spending data, so the tax benefits aren't possible.*

Yuki Watanabe

Head Of Global Mobility and Travel, Delivery Hero

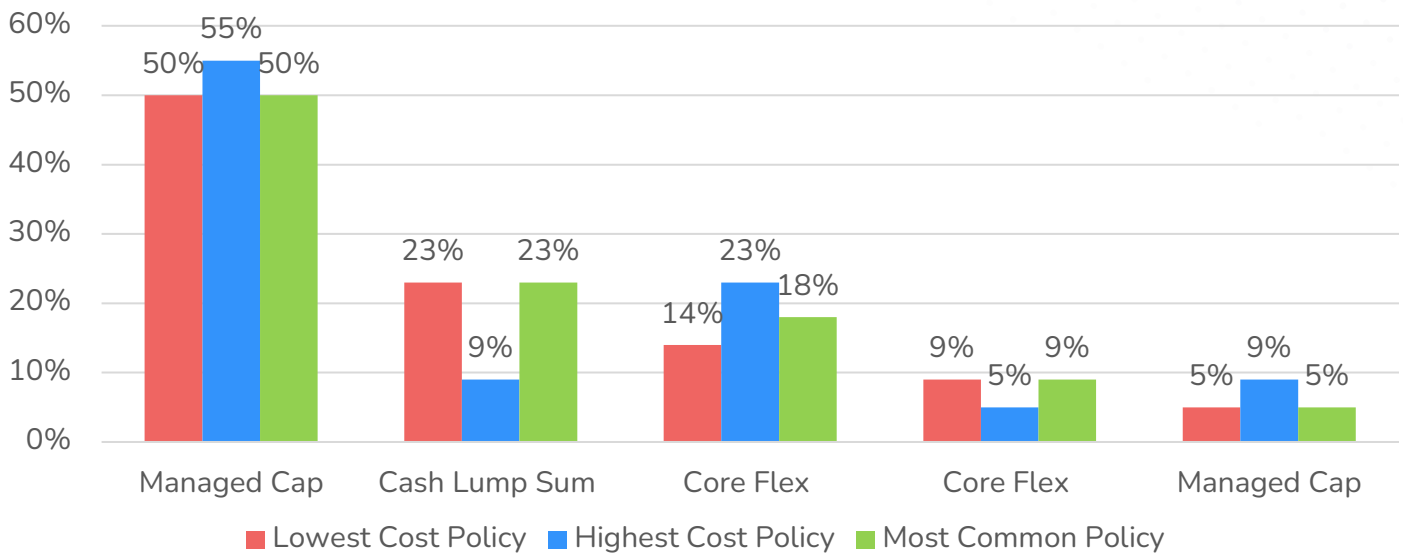




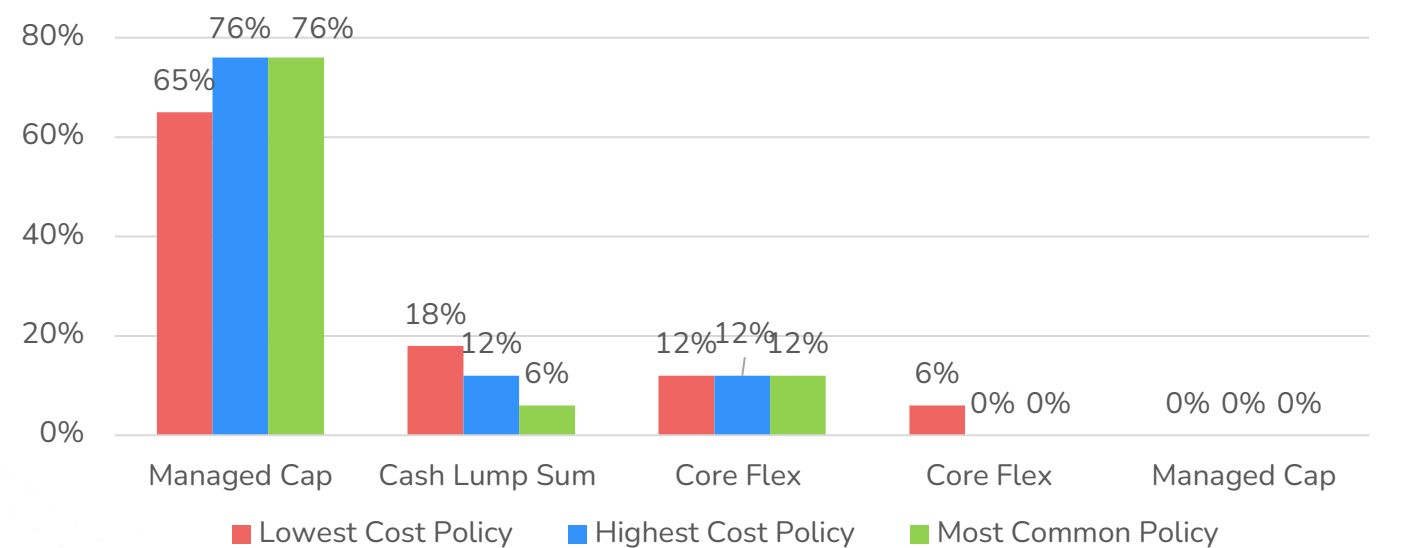
# Policy type

Respondents were asked the type of policy that was being used for each of their lowest, highest and most common relocation packages.

## Standard Policy Types <5,000 Employees



## Standard Policy Types >5,000 Employees



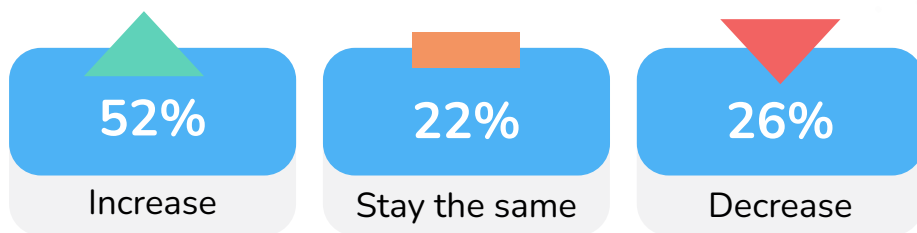
- Managed Policies form the majority of relocation packages, but there are significant volumes of newer policy models such as Core Flex, Lump Sums and Managed Cap policies.
- Cash Lump sums and Core Flex are much more likely for the lowest cost relocation packages as the flexibility allows for employees to cover the essentials when budget cannot cover all different relocation services.



# LOOK FORWARD TO 2025

## Priorities, Pains and Impact

What will happen to relocation volumes in 2025?

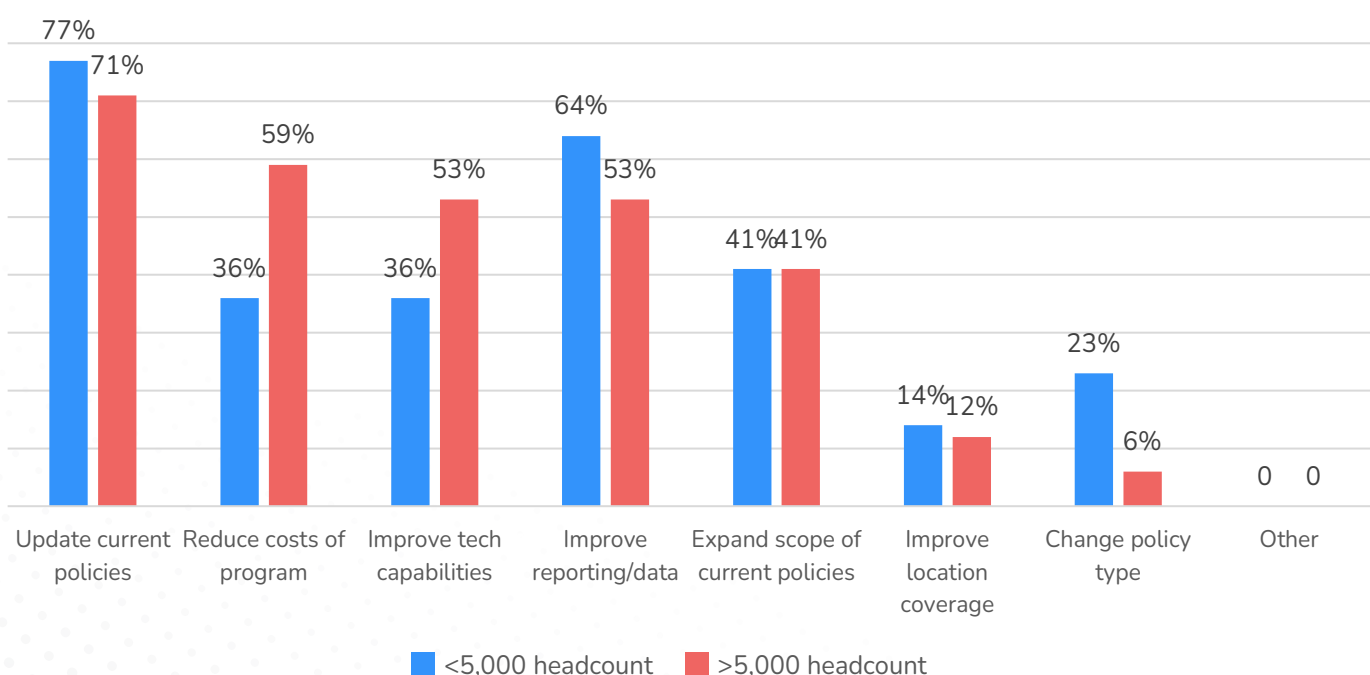


Based on a recent PerchPeek LinkedIn survey of business and relocation leaders

## Biggest Priorities For 2025

We asked Mobility leaders about their top priority focus areas for improving their programs and meeting business goals in 2025.

What elements of your policy or programme are you most focused on changing in the next 12-18 months?  
 <5,000 Employees and >5,000 Employees



# Why are these the priorities of Mobility Leaders?

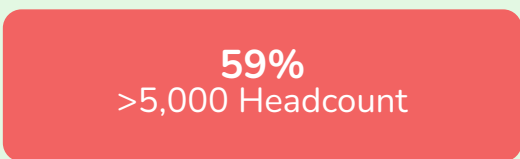


## Updating Current Policies



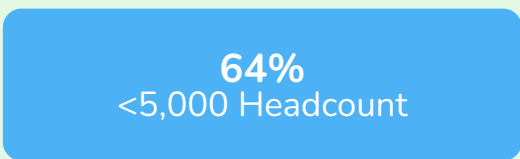
Global Mobility teams are being asked to support a broader range of relocation types than ever before, from permanent transfers to remote working to short-term assignments to graduate hires. This requires a lot of rescoping of policies.

## Reduce Costs



Often driven by wider business pressure. Many Mobility teams, like a lot of HR functions, are being expected to do more with less and streamline to reduce costs.

## Improve Reporting/Data



Data is essential if companies have the ambition of driving any improvements in their program, whether that be cost, efficiency, experience, DEI, or any other factor.

## Expanding Scope Of Current Policies



More common for companies with fewer than 5000 employees, this is often driven by a need to grow and expand program coverage to other regions and relocater groups.



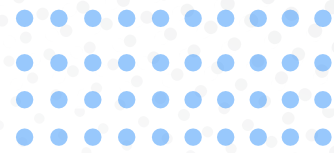
*It's been so interesting to see the demand surge for relocation program data from Mobility and Talent teams. As it becomes more central to talent strategy, Mobility is under the spotlight of senior management more and more often, and they're needing metrics like savings, satisfaction and success at their fingertips.*

**Francesca Thomson**

Head Of Customer Experience, PerchPeek




# Biggest Current Pain Points



Respondents were asked what element of their relocation policy or program is causing the most issues right now.

## Most frequently reported pain points (<5,000 headcount)

 <b>Cost</b>	 <b>Consistency of support</b>	 <b>Poorly suited support</b>	 <b>Business buy in</b>
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## Other frequent pains (<5,000 headcount)

<b>Bureaucracy</b>	<b>Expense reimbursements</b>	<b>Cross-border Commuters</b>	<b>Data</b>	<b>Housing</b>
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## Most frequently reported pain points (>5,000 headcount)

 <b>Business buy-in</b>	 <b>Costs</b>	 <b>Data</b>	 <b>VIPs</b>
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## Other frequent pains (>5,000 headcount)

<b>Expense reimbursements</b>	<b>Experience</b>	<b>Expectations Management</b>	<b>Lack of flexibility</b>
<b>Tech capabilities</b>	<b>Temporary Accommodation</b>	<b>Housing</b>	

## Some Potential Actions

 <b>Cost</b>	 <b>Consistency of support</b>	 <b>Business buy in</b>
<p><b>Quickfire Solutions:</b></p> <ul style="list-style-type: none"> <li>Streamline with tech</li> <li>Introduce a Flex policy</li> <li>Reduce high-ticket inclusions (shipping, high end temporary accommodation)</li> <li>Get better cost estimates data</li> <li>Do competitor market research</li> </ul>	<p><b>Quickfire Solutions:</b></p> <ul style="list-style-type: none"> <li>Use more global providers</li> <li>Centralise more activities</li> <li>Implement satisfaction data tracking</li> <li>Use a tech-based service, instead of manual email/phone-based support</li> <li>Use more tech tools across all relocators</li> <li>Develop consistent content for all locations</li> </ul>	<p><b>Quickfire Solutions:</b></p> <ul style="list-style-type: none"> <li>Get more program data</li> <li>Engage senior stakeholders who have relocated before</li> <li>Look for cost-saving opportunities and build proposals to win favour</li> <li>Distribute immigration rule changes and the implications for the company</li> </ul>

# Taking Action

Respondents were asked what change in their Mobility program in the last 12-24 months has had the best impact?


## Most common best actions (<5,000 headcount)

-  New Flex policy
-  Better self-service capabilities
-  Enhanced policy structure
-  Revamped policy

## Other actions being taken (<5,000 headcount)

- Increased business buy in
- More caps on services
- Upfront reimbursements
- More Flex budget
- Better Home Search support

## Most common best actions (>5,000 headcount)

-  Added Flexibility
-  Broadened Policy Scope
-  Better self-service capabilities
-  New Flex policy

## Other actions being taken (>5,000 headcount)

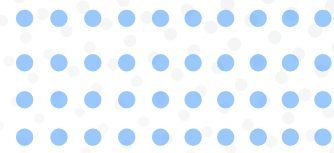
- Better family support
- Broadened Policy Scope
- Enhanced internal communications
- Remote working policy set up
- Stricter eligibility requirements
- Tax support updated
- Upfront reimbursements



If you'd like more information on how you can achieve these goals at your company, feel free to request more information at [info@perchpeek.com](mailto:info@perchpeek.com)



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