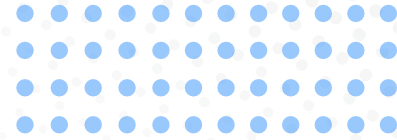




2025 Global Mobility Benchmarking Survey US & Canada

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.

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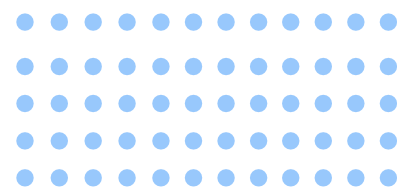
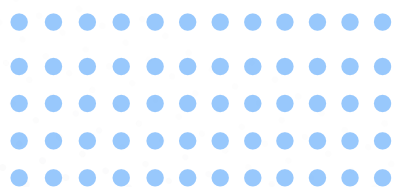


INTRODUCTION

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



The Global Mobility landscape is undergoing a significant transformation across North America and further afield, and it's a very exciting time to be in the industry! In today's dynamic business environment, relocation is evolving quickly, from a mere operational function to a strategic tool for attracting, retaining, and developing top talent. This shift necessitates a re-evaluation of traditional relocation policies and a data-driven approach to optimize costs and enhance the employee experience.

Historically, relocation was primarily used for senior executive assignments. However, it's now increasingly recognized as a solution for talent shortages across all levels of an organization. Corporate relocation volumes are expected to rise next year, and the data shows that relocation is being utilized for new hires and permanent internal transfers, to an even greater extent than temporary assignments. This is extremely important, as it means that Mobility programs require a more inclusive and flexible approach, catering to the needs of the entire workforce, not just the Exec's.

For the USA, this trend is likely to be further accelerated by the incoming administration, which is expected to make international relocations more challenging. As a result, companies may need to rely even more heavily on domestic relocation to fill talent gaps.

This report highlights that one of the most pressing challenges facing Global Mobility leaders is cost pressure. Rising prices of housing, shipping, and other relocation expenses have strained budgets. To address this, organizations are exploring strategies such as streamlining policies, offering alternative services, and leveraging technology to improve efficiency.

Another poignant trend is that as Mobility becomes a more central pillar of talent strategy, gaining buy-in from HR leaders and the broader organization is becoming more and more crucial for the success of global mobility initiatives. Data enhancement is therefore in major demand, as deeper program insights can help build compelling business cases, demonstrate ROI, and secure that seat at the table for Global Mobility teams.

Furthermore, with potential changes to immigration policies on the horizon, companies may need to be more strategic and data-driven in their relocation efforts. Having clear data on the ROI of relocation programs will be essential to justify the cost and effort involved, whilst in the US, clarity regarding other actions of the Trump administration, for example with respect to the Tax Cuts and Jobs Act of 2017, which is due for expiry, will be essential to continue improving a Mobility function.

By embracing technology and data analytics, GM teams can transform the relocation experience, elevate employee satisfaction, and drive business growth. By focusing on personalized support, efficient processes, and strategic alignment, organizations can navigate the complexities of global mobility and position themselves for future success.

I hope the insights presented in this report help you to refine your Global Mobility strategy for the year to come, and join us in shaping the Global Mobility of the future.

PERCHY TOP PICKS



Some of the standout takeaways from the data!

Streamlining & Simplifying

One of the standout enhancements that many companies had implemented in the last 12-24 months was to simplify their program, whilst a major pain was a lack of structure or overcomplexity. Transitioning to a smaller number of global policies, implementing caps on spends, and increasing broader organizational alignment can serve to simplify operations, manual work and make communication with the wider business much easier.

Growing Mobility as the strategic talent lever

Permanent transfers (supported by 100% of companies) are the most common relocation-type, ahead of traditional temporary assignments (93%). This reflects the use of relocation as a central tool for talent sourcing and attraction, compared to previous use for more traditional, temporary transfers of senior managers to lead oversea initiatives.

With relocation volumes widely expected to increase in 2025, this growing presence in talent strategy should be translating into closer integration with Talent and Development teams, and increased influence for Mobility.

Data is a top priority

Data enhancement was recorded as one of the top 3 most common priorities of GM teams. Obtaining business buy-in for Mobility is a common challenge, often due to insufficient data. A strong Mobility strategy relies on good data, which is now more accessible with affordable Mobility data products. If you can't access basic relocation data trends, such as live costs or relocater progress, consider questioning your provider or exploring other options.



Data and technology will play a critical role in 2025 in supporting new innovative programs to enhance the relocation experience. The majority of Global Mobility teams are looking at how they can utilize technology to streamline operations, simplify program administration, and provide more robust data analytics. Having access to detailed data and insights will enable us to make better data-driven decisions and track our programs more effectively.



Nikki Thomas

Global Mobility Program Manager, Micron

PERCHY TOP PICKS



Budgets are hurting

As macro-economic factors drive businesses to reduce budgets, costs are a major pain for Mobility teams. Companies were implementing more cost discipline, no longer grossing up allowances, implementing caps and replacing expensive traditional services to save budget. More than 75% of companies now offer an alternative to a household goods shipment. Do not hold back from driving this agenda with your partners and providers - one Global Mobility leader found their long-term immigration “partner” was charging them 300% higher than the standard market rate.

Going flexible


A significant portion of companies stated that the best action they have implemented in their policy is the introduction of flexibility. Flexible policies, such as Core Flex and Managed Caps, were allowing Mobility teams to reduce their number of policies, as they are, by nature, tailored to the individual, whilst scaling easily with seniority. They also allow simple application of budget caps, allowing greater cost control, and the personalisation of the policy both enhances experience and allows the business to spend less on fixed relocation items. If you haven't already, challenge your providers for more flexible solutions that deliver both enhanced experience and significant cost-saving benefits.

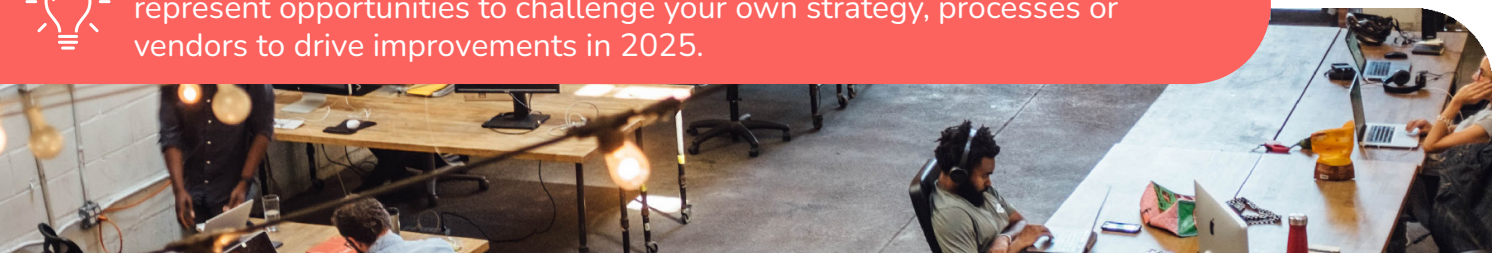
Relocation support for younger populations

60% of companies now offer relocation support for graduates and junior employees. These relocators will often receive the lightest relocation package, which data showed was in the \$10,000-\$20,000 range. Traditionally quoted relocation costs range from \$19,000 to over \$100,000, so new flex policies and “Lite” policies are being developed for graduates - programs that incorporate lower cost, tech-native-friendly tools such as self-service capabilities and flex allowances.

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.





METHODOLOGY

This US & Canada report is based on a survey of 110 HR and Mobility professionals globally, with over 1000 employees that support employee relocations, focusing on the findings from leaders whose predominant relocations were permanent transfers to and within the US & Canada.

The industries

Respondents were from an array of sectors, including

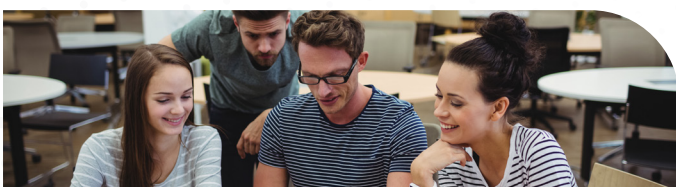
- Automotive
- Banking & Financial Services
- Construction
- Information Technology
- Energy
- Hospitality & Tourism
- Transportation & Logistics
- Manufacturing
- Food & Beverage
- Healthcare & Pharmaceutical
- Manufacturing & Retail



LABELS:

US Canada Domestic - The results of companies whose most common relocation types were relocations within the US or Canada.

US Canada International - The results of companies whose most common relocation types were international relocations to the US or Canada.



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

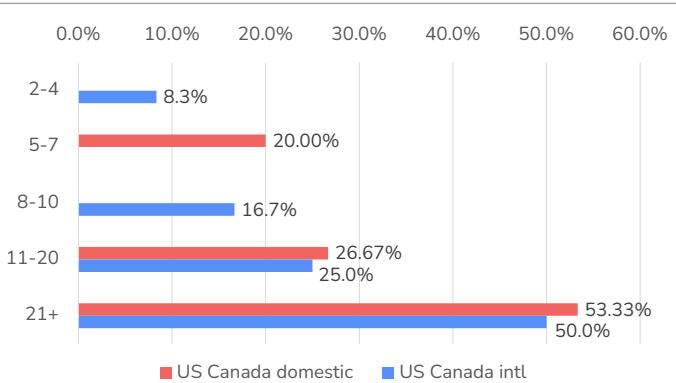
Core Flex – Relocators are given some essential “core” services, plus a “flex” budget amount (either in a cash budget or points format) which they can direct towards services/purchases of their choice

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

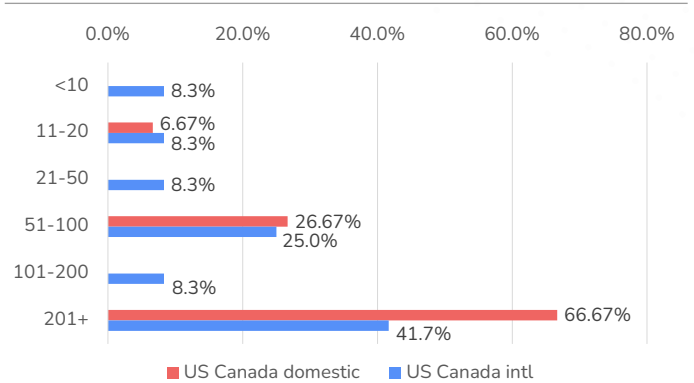
Basic policy info

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

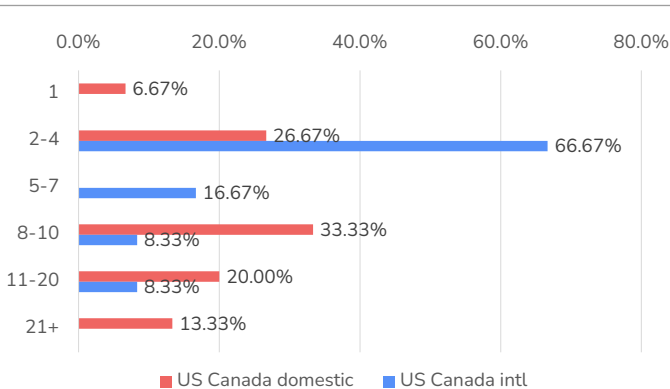
How many countries does your company have employees in?



Roughly how many relocations occur at your company each year?



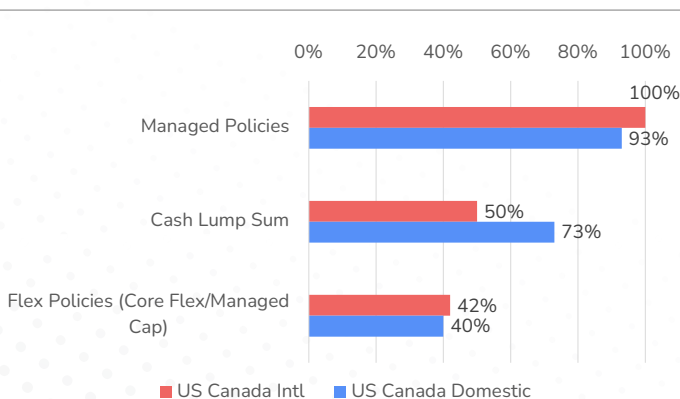
How many different global mobility (relocation) policies do you have?



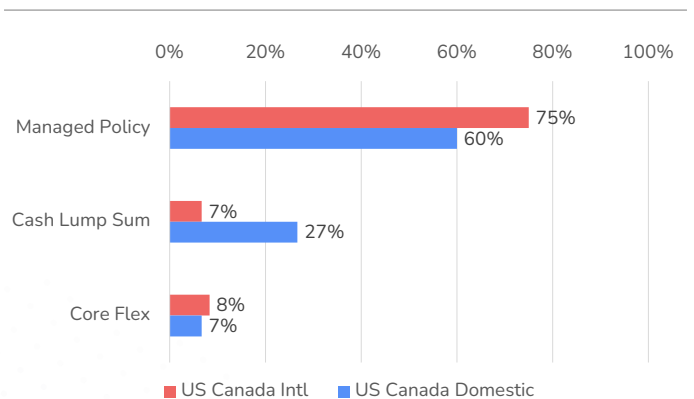
Policy types

Traditional, fully managed policies, where a fixed set of services are given to the relocater, are by the far the most common in major organizations, with cash lump sums also present to a significant degree, in particular for US Domestic relocations. However there is a growing presence of more modern “flex” packages - Core Flex or Managed Cap policies are now present in 40% of companies, and especially common in smaller, more agile companies. These policies provide some guidance or specifications on where budget can be spent (unlike a lump sum), but allow relocators a lot more freedom than managed policies. Where flexible policies were the main policy type used, it was a Core Flex policy.

What type of policies do you support



What is your most common policy type right now?





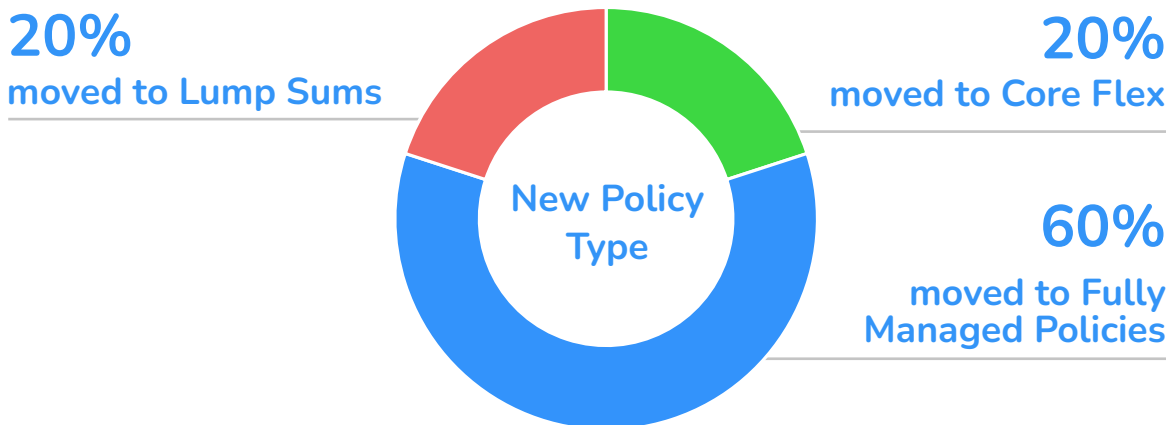
Many Global Mobility teams are under budget pressures right now and may view Core-Flex policies as a way to both control costs and provide better employee experience over a cash lump sum. These policies include core support and guidance while allowing for some tailoring to the individual in order to minimize policy exceptions and support diverse employee needs.



————— **Karen Hale**
Senior Manager Global Mobility, Unity

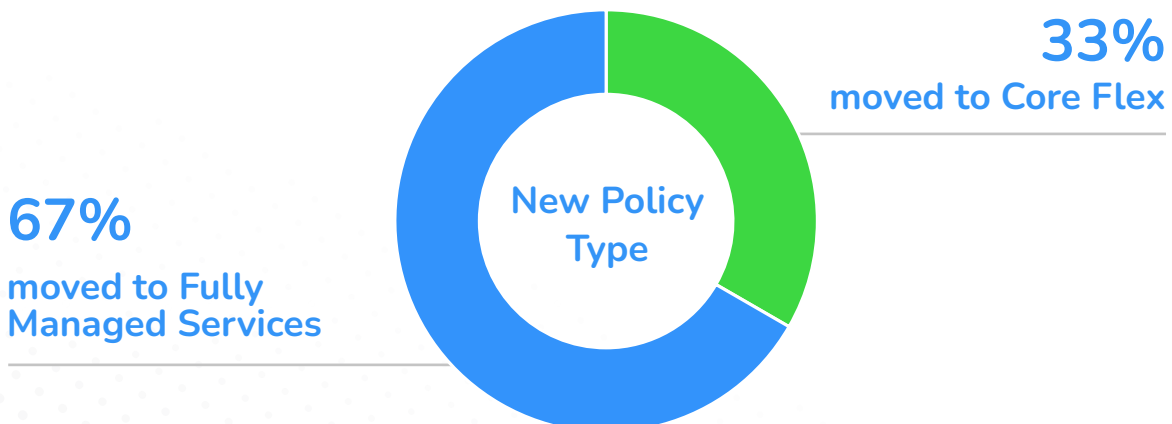
Flex policies more common in recent policy changes.

Of companies that changed their main policy type in the last 2 years, 20% shifted to flexible policies, 60% shifted to Managed Policies (from Cash Lump Sums), and 20% shifted to Cash Lump Sums.



Flex policies more common in recent policy changes.

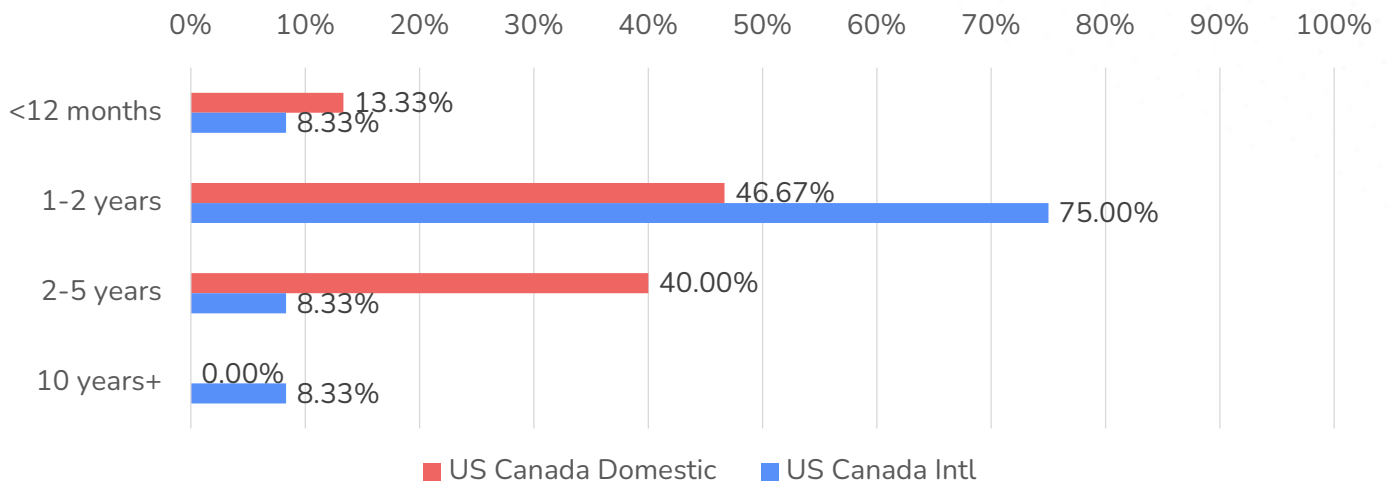
Core Flex was increasingly common in companies focused on domestic US Canada relocations.



How often are companies reviewing their policies?

A broader view of policy review frequency highlighted the tendency of internationally-focused relocation programs to be more frequently than Domestic programs.

How often do you review your policies?



The most common frequency for reviewing relocation policies was every 1-2 years. This was particularly the case for companies with a focus on international relocations - domestic policies were more likely to be reviewed less frequently, in 2-5 year intervals.

11% of companies reviewed their policies at least every 12 months

70% of companies reviewed their policies at least every 2 years.

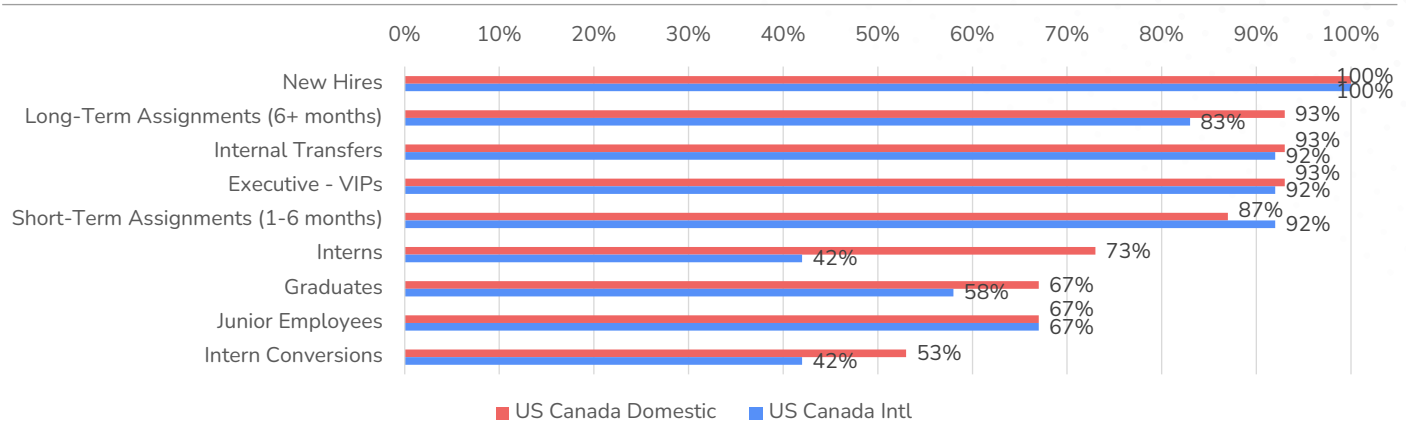
96% of companies reviewed their policies at least every 5 years.



KEY FACTORS AFFECTING POLICY INCLUSIONS

Who gets supported?

Which types of relocators does your company provide support for?



- It was very notable that in the US, a far greater breadth of relocators was supported than in EMEA. All companies supported new hire relocations, while more than 85% also supported internal transfers, VIPs and temporary assignments (short and long term). Temporary assignments were supported by less than 60% of companies in EMEA.
- Permanent transfers (internal transfers and new hires) were more likely to be supported than temporary assignments. This reflects the modern nature of relocation as a source of talent management, overtaking the more traditional use cases of being used to temporarily placing leaders in specific regions, although temporary assignments were still very common.
- Both VIPs (92%) and junior employee (67%) relocations were frequently prevalent for the respondents - and reflect the importance of having a smoothly scaled relocation program - where VIP relocators can be demanding and expensive with high expectations, it is not usually financially viable to provide similar services for junior employees, and high touch manual services often do not suit this tech-native group anyway. The effective adjustment of policies between seniority bands is extremely important for cost efficiency and consistently high experience.
- As well as junior employees, a significant portion of companies (74%) offer relocation support to either graduates and interns. This reflects the battle to hire top talent occurring at all levels of the corporate hierarchy, and relocation becoming a central pillar to winning the battle for top talent, even at more junior levels.
- Relocation support is extremely important for the DEI metrics of an organization- as candidates from less wealthy backgrounds are less likely to be able to relocate.



The rewards gained from a great graduate onboarding experience as a long-term retention strategy are invaluable. With the growing capabilities of lower cost, tech-enhanced solutions, Mobility teams are looking to adjust their approaches for Graduate relocators and drive this initiative forwards.

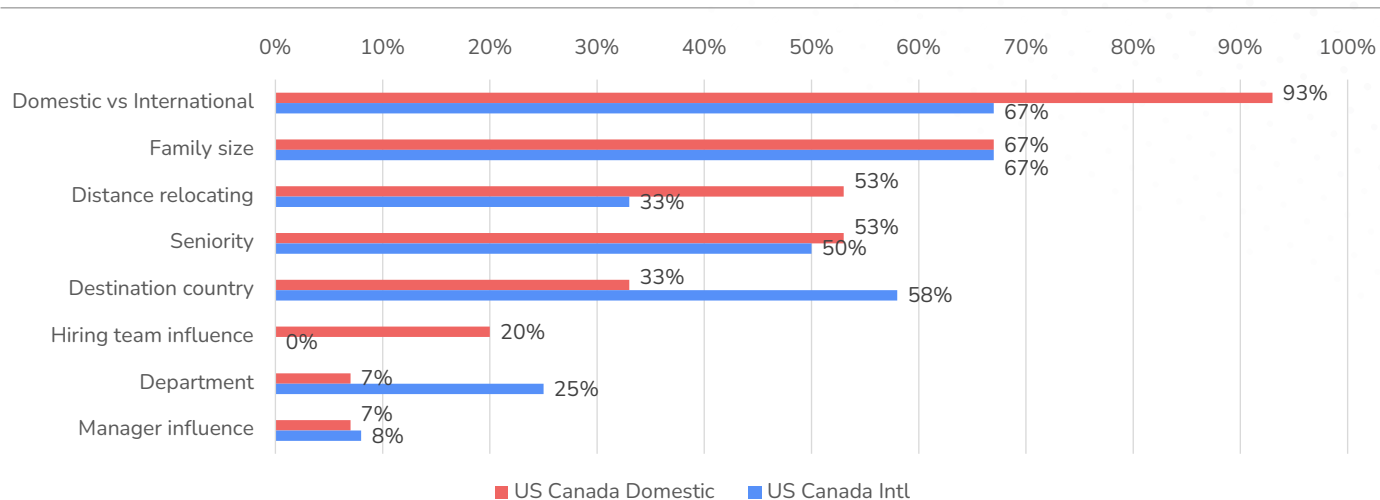
Frank Belmonte
Global Mobility Program Manager



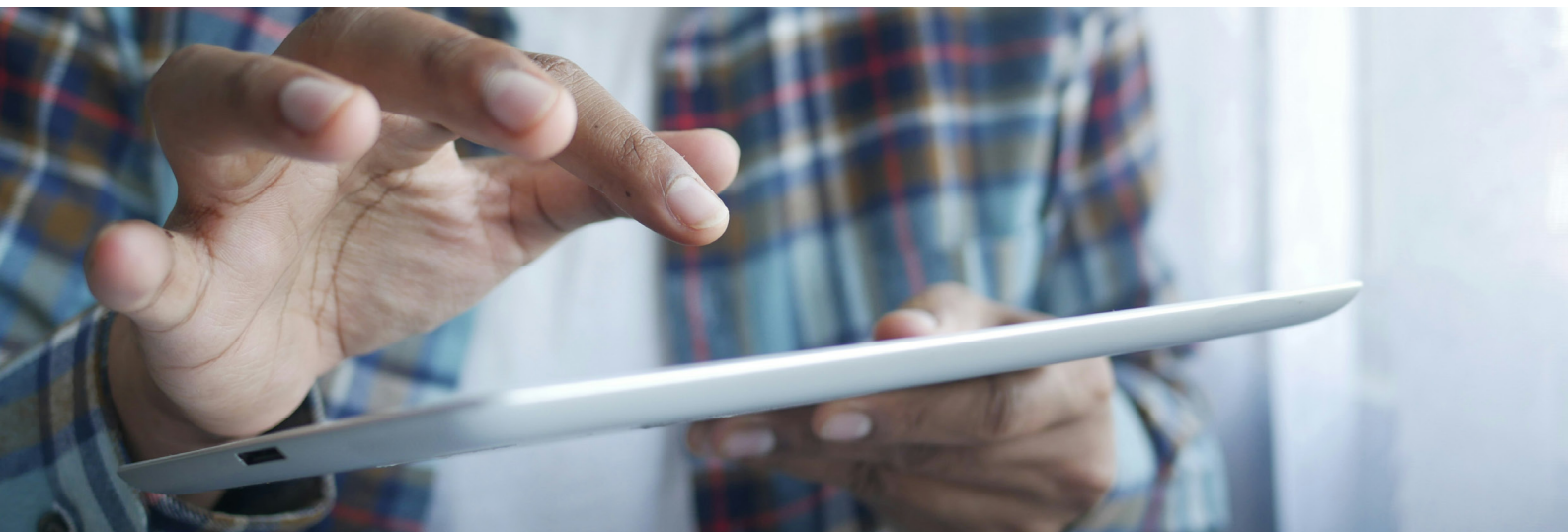
If you'd like to learn about how to optimise relocation policies for Graduate relocations, see PerchPeek's article [here](#)

What do relocator packages depend on?

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

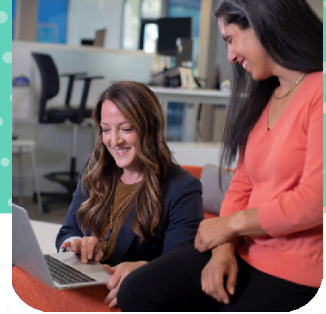


- **International relocators and larger families receive more support** - More than 85% of companies overall adjust policy for international relocations (and 93% of companies with a domestic relocation focus), while 67% adjust it if dependents are involved. Family size was more likely to be taken into consideration in the largest companies
- **Even split on whether seniority impacted relocation packages** - Seniority impacted relocation package 50% of the time in companies focusing on domestic relocations, 53% of the time for international relocations.
- **When relocating internationally, destination country is significant** - 58% of companies focusing on international relocations adjust their policies on destination, whilst 42% do not.
- **When relocating domestically, distance is significant** - 53% of companies focusing on domestic relocations adjust their policies on distance, whilst 47% do not.
- **Manager and hiring team rarely have influence** - Relocation packages were impacted only 20% of the time by either Hiring team or manager influence in Domestic relocations, and only 7% in companies focusing on international relocations. This implies more rigid policies with fixed bandings.

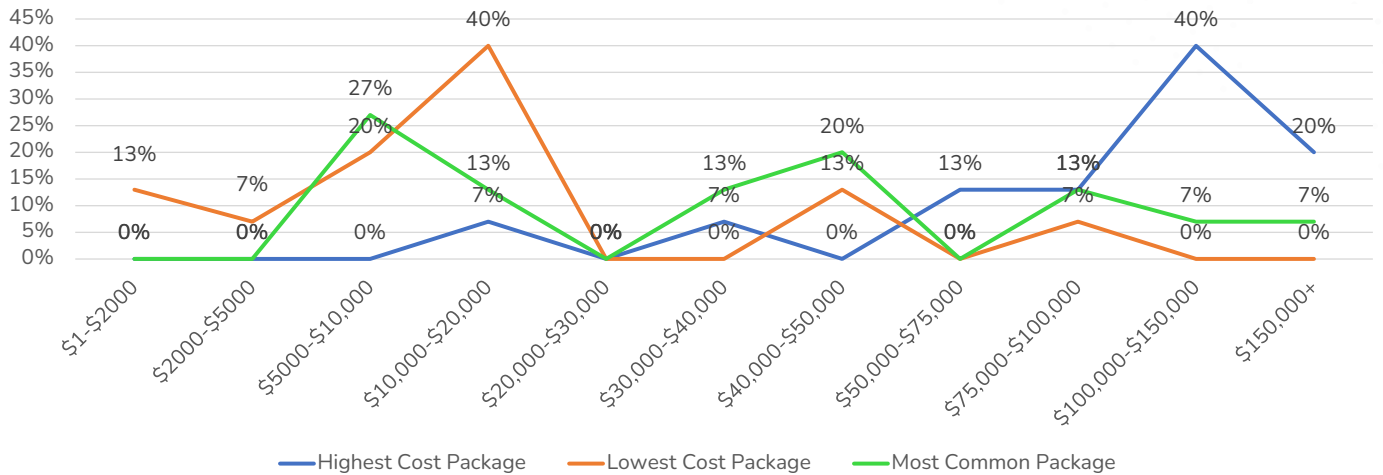


POLICY INCLUSIONS

How Much Do Relocations Typically Cost?



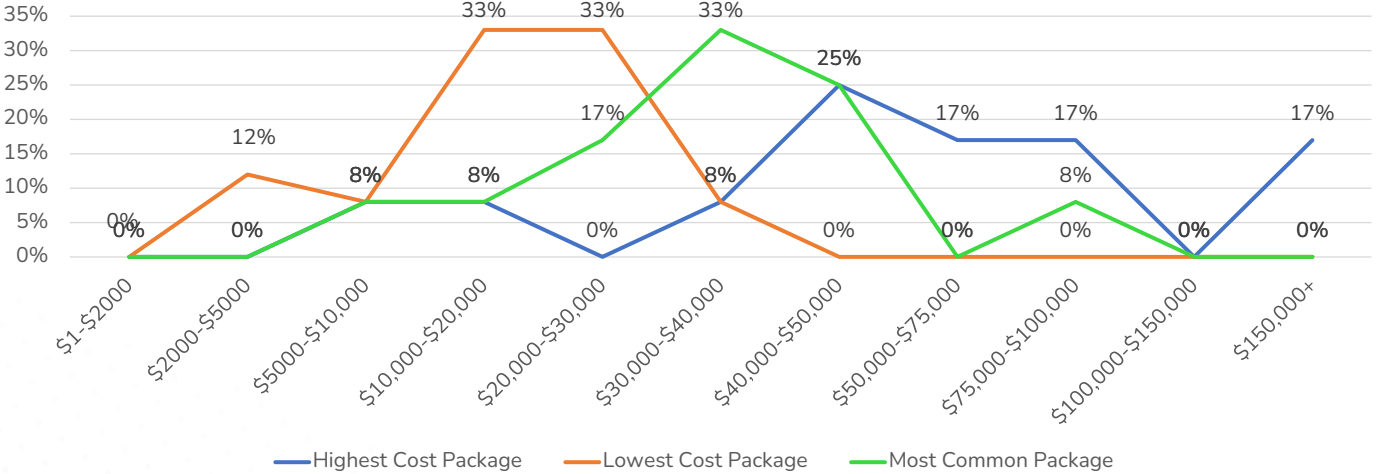
How much does it roughly cost? (excluding immigration)
US Canada Domestic



For companies that primarily focus on US Canada domestic relocations

Lowest Cost Package Median: **\$10,000-\$20,000** Highest Cost Package Median: **\$100,000-\$150,000** Most Common Cost Package Median: **\$30,000-\$40,000**

How much does it roughly cost? (excluding immigration)
US Canada International



For companies that primarily focus on International relocations to US & Canada

Lowest Cost Package Median: **\$10,000-\$20,000** Highest Cost Package Median: **\$50,000-\$75,000** Most Common Cost Package Median: **\$30,000-\$40,000**

The most common relocation packages of companies varied widely, from \$2,000-\$5,000 up to \$50,000-\$75,000 range for international relocations and from \$10,000-\$20,000 up to \$150,000 for domestic US relocations.

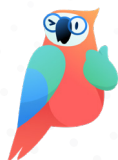
- The median value of the most common relocation package was \$30,000-\$40,000, both for companies with domestically focused relocations and with internationally focused moves.
- Companies with domestically focused relocations had larger highest cost packages (median \$100,000-\$150,000) than those for more internationally focused relocations (\$50-\$75,000).
- The lowest cost company relocation packages were consistent across the board, ranging from \$2,000 upwards, with a median in the \$10,000-\$20,000 region.

Industry Focus

The highest relocation packages were seen in Healthcare, Pharma and Entertainment sectors, while Information Technology and Construction in general offered the lowest relocation support packages.

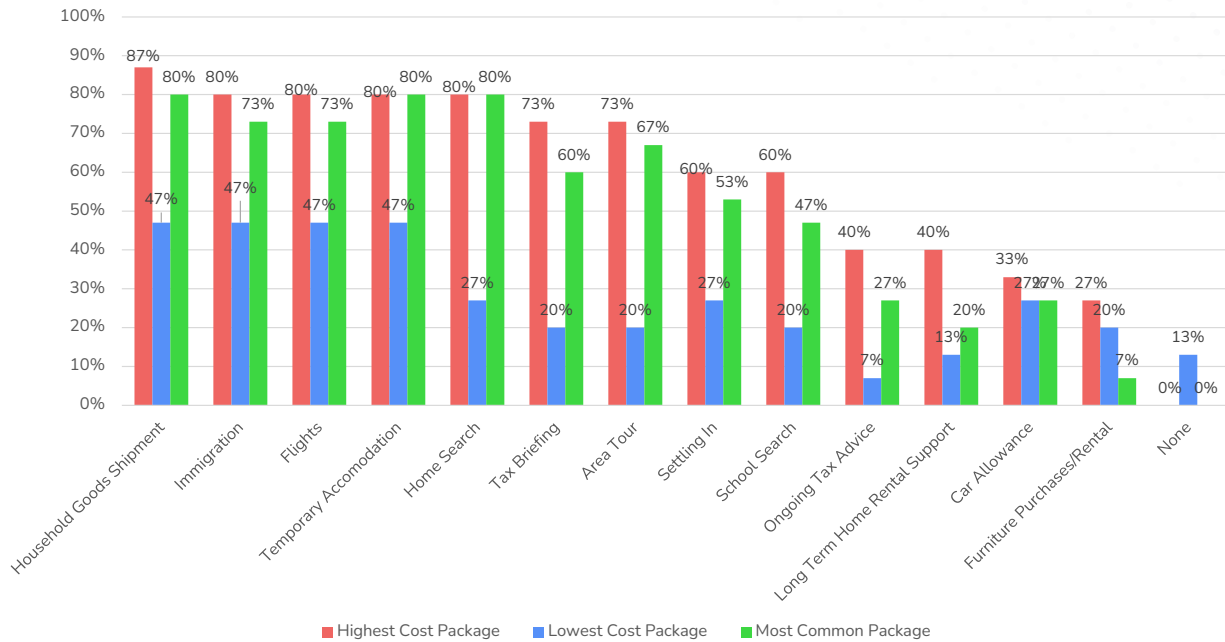


If you seek more detailed information on a specific industry's benchmark data, please reach out at info@perchpeek.com.

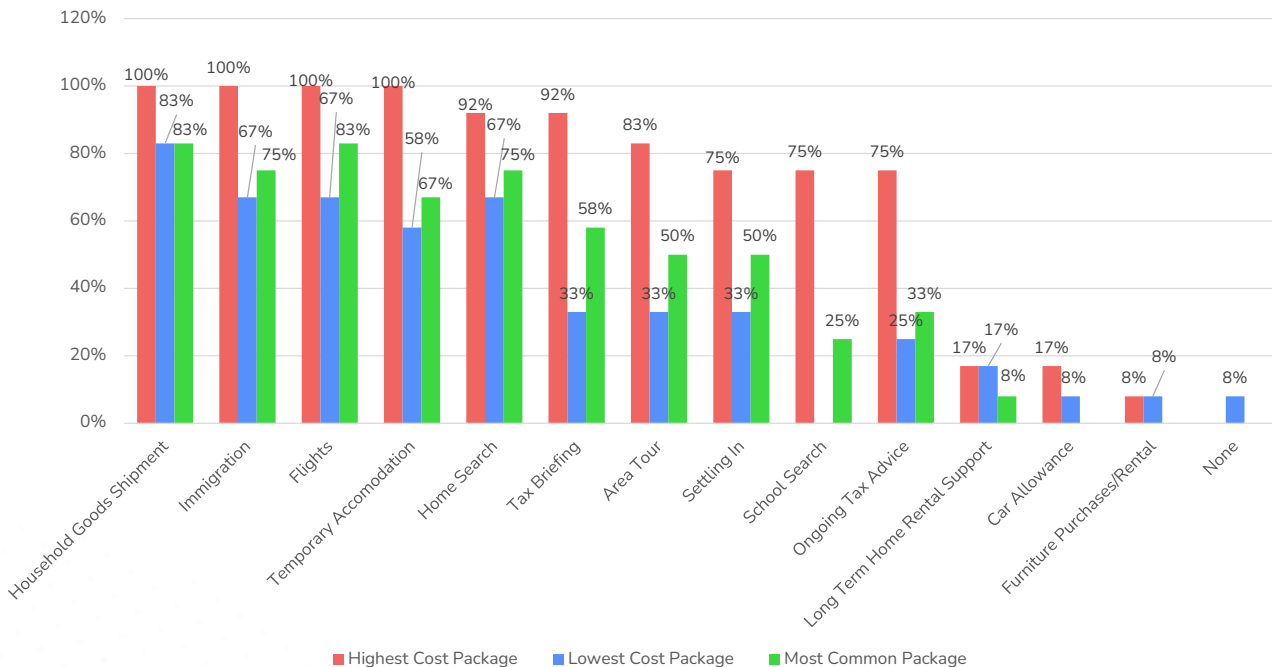


POLICY INCLUSIONS

What services are usually included? US Canada Domestic

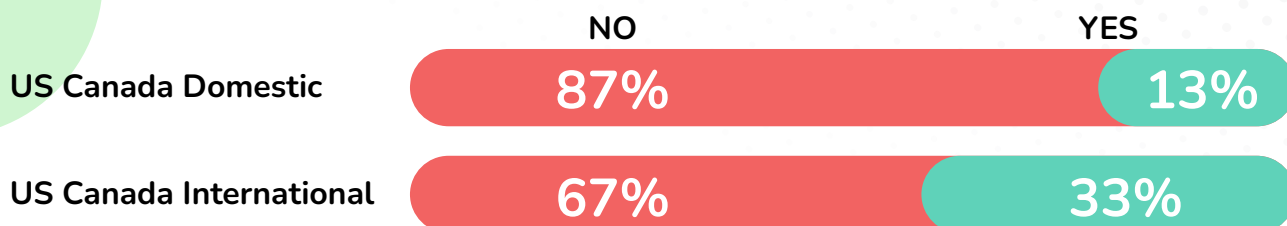


What services are usually included? US Canada International

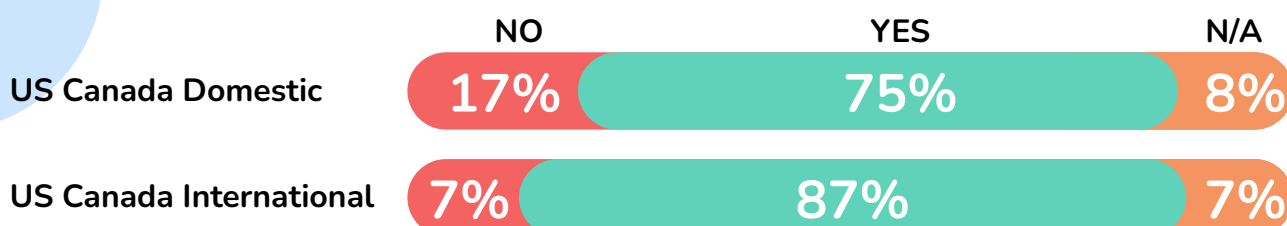


If you are finding your policy costs or inclusions are out of line with the above benchmarks, or you're looking to reduce costs, challenge your vendors or other vendors for market data on specific service costs, and review the overall benefits to your relocators, and whether that money would be better 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?



- The most common package inclusions are Flights, Immigration, Temporary Accommodation and a Household Goods Shipment. These are always included in the highest cost packages of international relocators, and 80% of the highest domestic packages.
- Services such as Area Tours, Settling In, Tax Briefings, School Search and Ongoing Tax Advice are often included in a company's most common relocation package, but often excluded from the lowest relocation package.
- Companies focused on international relocations were more likely to offer relocation service support in general
- For 33% of companies, the lightest domestic packages included no service support at all.
- 67% of companies that focus on international relocations include Home Search support in their lowest packages, whilst only 27% of the companies focusing on domestic relocations do so.
- Shipping was included in less than 50% of the lower packages, whilst the vast majority of 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

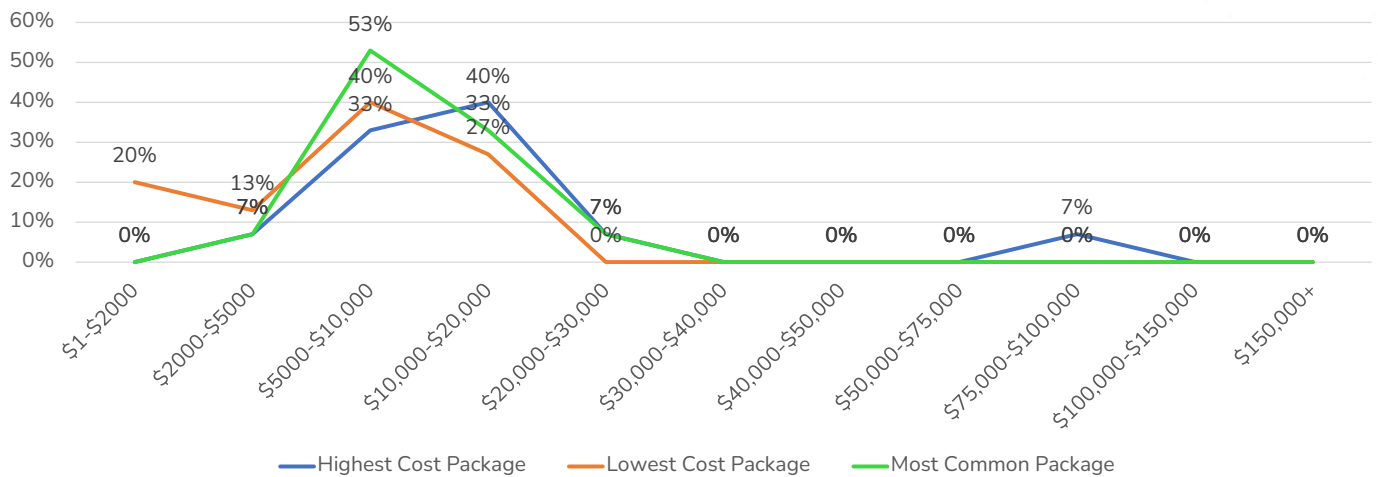


Lump sum bonuses or flexible allowances

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



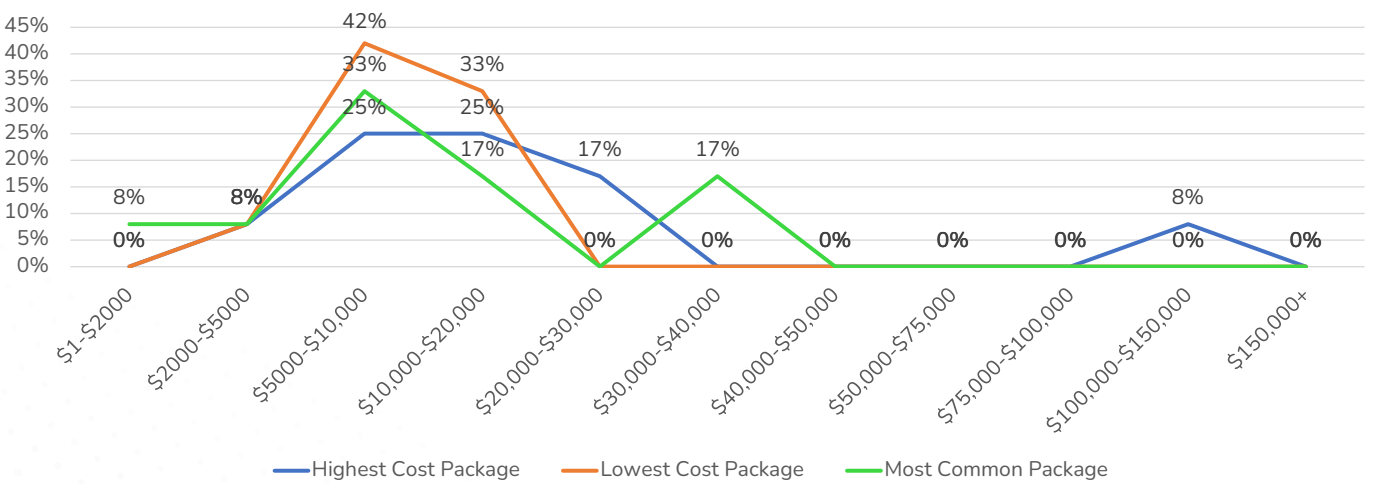
What value is the flexible (cash or points) allowance? US Canada Domestic



For companies that primarily focus on US Canada domestic relocations

Lowest Policy Flexible/Cash Bonus Median: \$5,000-\$10,000	Most Common Policy Flexible/Cash Bonus Median: \$5,000-\$10,000	Highest Policy Flexible/Cash Bonus Median: \$10,000-\$20,000
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What value is the flexible (cash or points) allowance? US Canada International



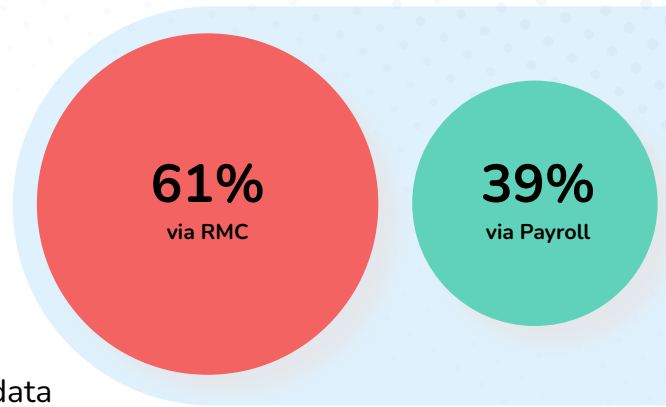
For companies that primarily focus on International relocations to US & Canada

Lowest Policy Flexible/Cash Bonus Median: \$5,00-\$10,000	Most Common Policy Flexible/Cash Bonus Median: \$10,000-\$20,000	Highest Policy Flexible/Cash Bonus Median: \$10,000-\$20,000
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39% still reimburse cash allowances via payroll

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

1. It does not allow any collection of any spending data
2. It does not allow for tax deductions based on relocation expenses
3. It puts the onus on the relocator to have the financial capacity up front to pay for relocation costs - which is not always the case, especially for more junior relocators and new hires



“

Mobility teams are seeing so much value from being able to understand where relocation allowances are spending their cash allowances, whether that's to help save costs, achieve tax reductions or to optimize policy components. This data is really hard to obtain if the allowance is just given via payroll.

Francesca Thomson

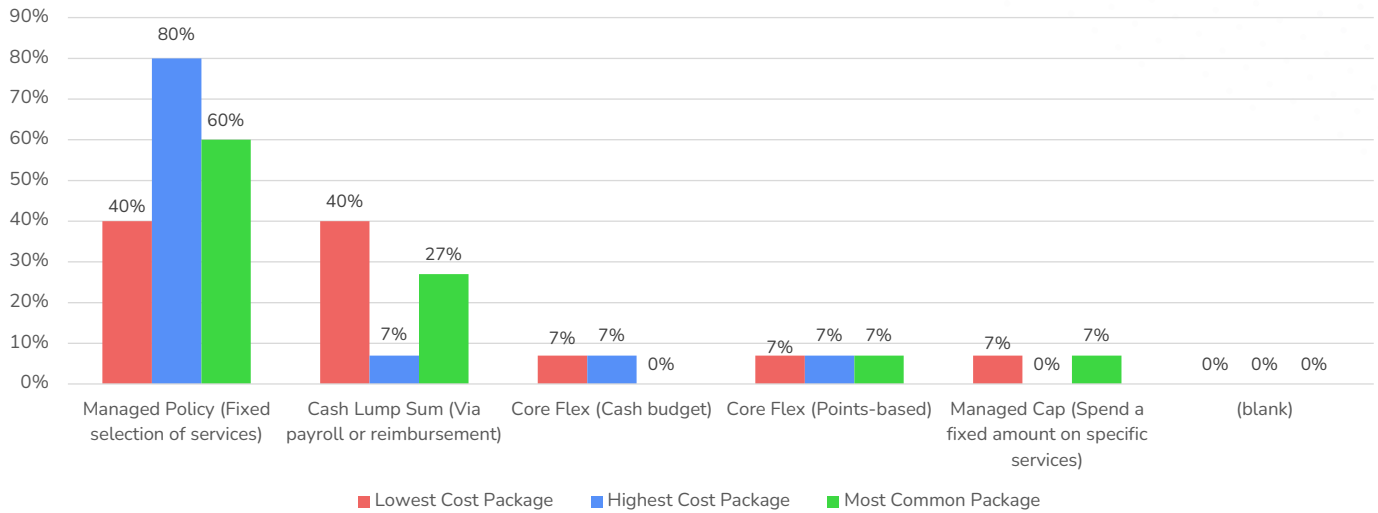
Head Of Customer Experience, PerchPeek



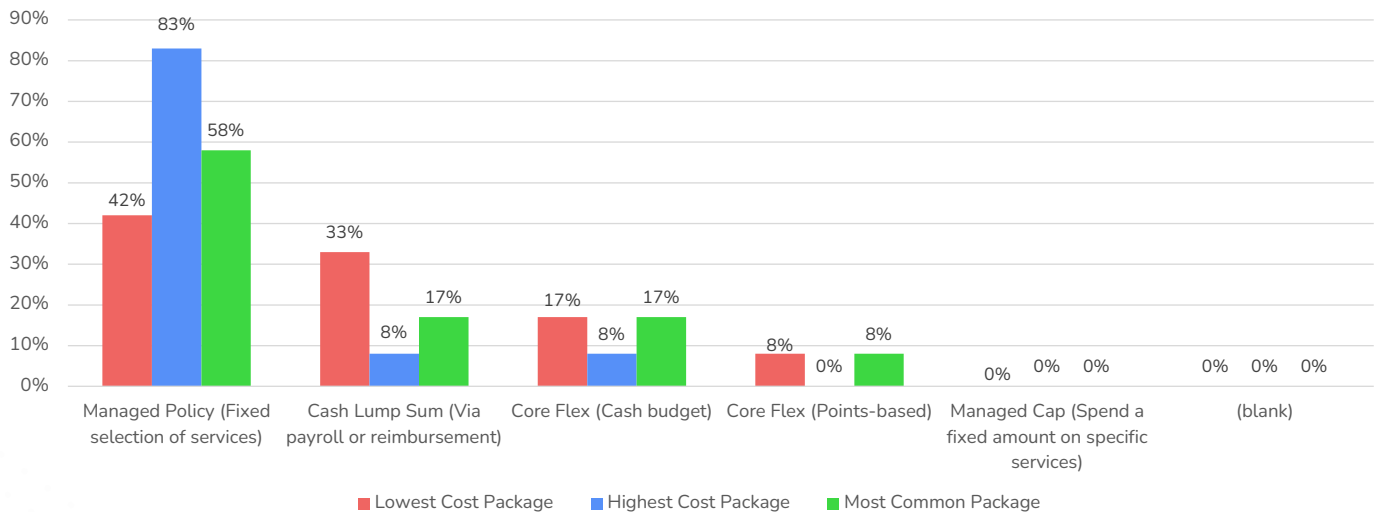
Policy type

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

Standard Policy Type US Canada Domestic



Standard Policy Type US Canada Int'l



- 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.

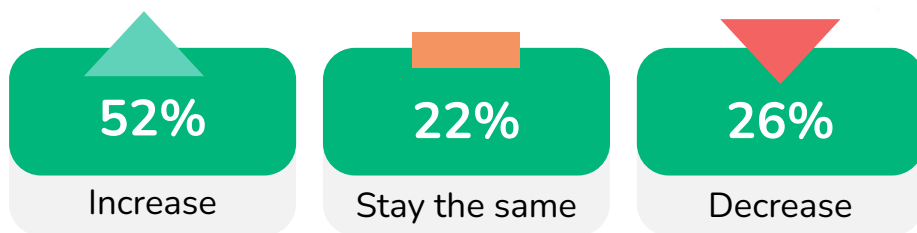


LOOK FORWARD TO 2025

Priorities, Pains and Impact



What will happen to relocation volumes in 2025?

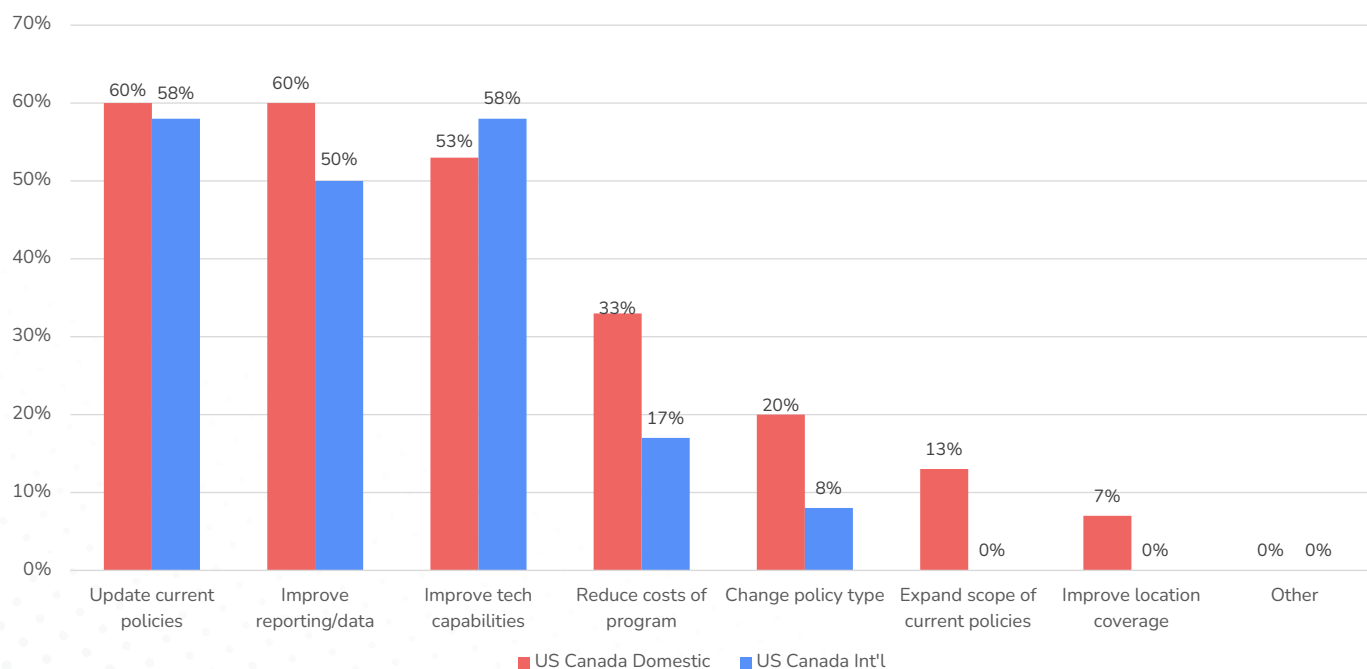


Based on a recent PerchPeek LinkedIn survey of business and relocation leaders

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 changes need to be made?



Why are these the priorities of Mobility Leaders?

Improve Reporting/Data

60%
US Canada
Domestic

54%
US Canada
International

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.

Improve Tech capabilities

53%
US Canada
Domestic

63%
US Canada
International

With demands to simplify, streamline, and support more relocators, as well as enhance experience without a corresponding increase in headcount or budget is driving Mobility teams to invest in technology to drive efficiencies and improve processes and service.

Updating Current Policies

54%
US Canada
Domestic

54%
US Canada
International

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

33%
US Canada
Domestic

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.



In a world of evolving geopolitical landscapes and the upcoming 2025 administration change in the US that is hyper focused on tighter immigration policies, Global Mobility teams will increasingly rely on data analytics to drive strategic decision-making to reduce termination of foreign nationals and to navigate any new compliance rules. More importantly to highlight the economic value of international talent in an era of increased immigration scrutiny and demonstrate the critical advisory piece that mobility teams bring to the business.

Tamara Dykes

Global Mobility Leader

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 (US Canada Domestic)

 Cost	 Consistency of support	 Poorly suited support	 Business buy in
--	--	--	---

Other frequent pains (US Canada Domestic)

Bureaucracy	Expense reimbursements	Cross-border Commuters	Data	Housing
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Most frequently reported pain points (US Canada International)

 Business buy-in	 Costs	 Data	 VIPs
---	---	---	--

Other frequent pains (US Canada International)

Expense reimbursements	Experience	Expectations Management	Lack of flexibility
Tech capabilities	Temporary Accommodation	Housing	

Some Potential Actions

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

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 (US Canada Domestic)

-  Streamlining policies
-  Early Careers Policy
-  Lower Cost Policy
-  Launching Flexible Policy

Other actions being taken (US Canada Domestic)

- Added Homeowner Benefits
- Simplifying Processes
- New Policy Launch
- Better Family Support
- New RMC

Most frequently reported pain points (US Canada International)

-  Launching flexible policy
-  Increased scope of policies

Other frequent pains (US Canada International)

- Taking relocation in-house
- Introducing self-driven relocation program
- Stricter eligibility requirements
- Simplifying processes

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