

ATLAS WORLD GROUP

49th Annual  
**CORPORATE  
RELOCATION  
SURVEY**

Results



Results Year

**2016**

**The Industry's Longest  
Running Survey**

Management  
Summary &  
Results Charts



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# Foreword

## Situational Analysis

Atlas World Group conducts corporate relocation issues research on an annual basis. This is the fourteenth year the study has been conducted via the Internet. Invitations to participate in the survey were sent to mailing lists of selected relocation-related associations and human resource/relocation decision-maker contacts. In order to qualify for the survey, a respondent must: 1) have relocation responsibility and 2) work for a company that has either relocated employees within the past two years or plans to relocate employees this year.

For the 49<sup>th</sup> Annual Corporate Relocation Survey, Atlas World Group utilized Qualtrics software for building and conducting survey research on the Internet.

## Methodology

In 2016, 445 surveys were completed by qualifying participants online from January 14 through March 7. Multiple choice questions add to 100% (+/- 1%) due to rounding. Other questions totaling above 100% are due to multiple responses.

Company Size (By Salaried Employees)	Total	% of Sample
Less than 500 Salaried Employees – Small	155	35%
500-4999 Salaried Employees – Mid-Size	155	35%
5000+ Salaried Employees – Large	135	30%
Total	445	100%

# Management Summary

## Relocation Volumes & Budgets

- ❖ Companies surveyed report a median range of 20-49 employee relocations in 2015 (small companies report 1-9, mid-size companies 50-99, and large companies 200-399). The median number of relocations by large firms remains at normative levels established 2002-2007 after spending 2008-2010 far lower (100-199) and small firms return to historical norms after rising higher last year (10-19). The median relocation level for mid-size firms remains higher for the second year in a row than historical norms (20-49).

By Company Size (Salaried Employees)				
Number of Employees Relocated in 2015	Total	Less than 500	500-4999	5000+
Median Range	20-49	1-9	50-99	200-399

- ❖ Roughly half (51%) of the companies surveyed indicate employee relocation volumes increased in 2015. More than 40% saw volumes remain the same and ten percent saw them decrease. Company size continues to impact relocation volumes: significantly more mid-size (57%) report volumes increased than small (45%) in 2015, while only slightly fewer large firms saw increases (49%).

By Company Size (Salaried Employees)				
2015 Relocation Volumes Compared to 2014	Total	Less than 500	500-4999	5000+
Increase Significantly	11%	8%	12%	14%
Increase Somewhat	39%	37%	45%	35%
Stay About the Same	40%	47%	31%	41%
Decrease Somewhat	7%	6%	8%	7%
Decrease Significantly	3%	2%	3%	3%



# Management Summary

## Relocation Volumes & Budgets (cont.)

- ❖ As volumes increased in the years after the Great Recession, budgets did not initially keep pace. However, in both 2014 and 2015, nearly half of companies indicate relocation budgets increased, and 41% believe their budgets will increase again in 2016.
- ❖ Last year, regardless of size, essentially half of all firms saw budget increases. While in the past larger firms were the most likely to see budgets increase, budgets across company sizes saw stability or increases in budgets at similar levels last year; only ten percent or less of firms across sizes indicate any budget decreases occurred in 2015. However, this is only the second year that volume and budget increases reported the previous year have been in agreement since the last economic retraction. Over the previous years of recovery from the Great Recession volumes increased but budgets did not rise at the same level, indicating that the creative budgeting methods that **allowed firms to “do more with less” during the latest economic downturn have made a permanent mark on policy and practice.**

By Company Size (Salaried Employees)				
2015 Relocation Budgets Compared to 2014	Total	Less than 500	500-4999	5000+
Increase Significantly	11%	10%	10%	11%
Increase Somewhat	37%	35%	39%	35%
Stay About the Same	44%	46%	41%	45%
Decrease Somewhat	6%	5%	7%	7%
Decrease Significantly	3%	3%	3%	2%

# Management Summary

## Relocation Volumes & Budgets (cont.)

- ❖ Most firms expect volumes and budgets to either increase or stay level with 2015; Around four out of ten firms expect volumes and budgets to increase and the percentages of firms expecting cuts to relocation volumes and budgets remain at non-recessionary levels. Historically, larger firms have typically had the brightest outlooks in expecting increases to volumes and budgets but this year expectations are similar across firm sizes with the overwhelming majority expecting either increases or stability.

By Company Size (Salaried Employees)				
2016 Expectations: Relocation Volumes	Total	Less than 500	500-4999	5000+
Increase Significantly	11%	11%	12%	12%
Increase Somewhat	28%	27%	30%	27%
Stay About the Same	47%	47%	44%	52%
Decrease Somewhat	10%	10%	10%	9%
Decrease Significantly	3%	5%	5%	1%
2016 Expectations: Relocation Budgets	Total	Less than 500	500-4999	5000+
Increase Significantly	12%	10%	11%	15%
Increase Somewhat	29%	30%	33%	24%
Stay About the Same	44%	44%	41%	47%
Decrease Somewhat	11%	11%	11%	13%
Decrease Significantly	4%	5%	5%	1%

# Management Summary

## Relocation Volumes & Budgets (cont.)

- ❖ Most (68%) respondents state that declining the opportunity to relocate does not hinder an employee's career. Over half (61%) indicate they had employees decline the opportunity to relocate in 2015; however, only 48% of respondents from small companies indicate this was the case, while 62% of mid-size and 76% of large firms indicate they had employees decline relocation.
- ❖ Over half of respondents state that the number of employees who declined relocation did not change substantially between 2014 and 2015 across company size. However, while the percentage of firms that saw an increase over the previous year fell slightly below the peaks in 2008-2009 (22% vs. 28%+) and 2014 (28%), it remains above post-recession levels (11%-18%) of recent years. Mid-size firms reported the highest impact of this issue (30%) compared to small (17%) and large firms (19%); last year the impact was similarly elevated across company size and 2008-2009 saw far more mid-size and large firms affected than small.

By Company Size (Salaried Employees)				
Reasons for Declining Relocation* (Top 6)	Total	Less than 500	500-4999	5000+
Family Issues/Ties	69%	74%	72%	62%
Spouse's/Partner's Employment	55%	53%	55%	57%
No Desire to Relocate	41%	47%	41%	37%
Personal Reasons (non-disclosed)	37%	40%	33%	38%
Housing/Mortgage Concerns	32%	36%	32%	28%
Cost of Living in New Location	29%	29%	25%	33%

\*of companies with declined relocations (Q8)

- ❖ Overall, 32% of companies who had employees decline relocation last year state that housing/mortgage concerns was a reason cited, decreasing for the third year in a row after spiking 2008-2012 (65%+) essentially equal to 2005-2006 (30%+). Family issues/ties remains in the top spot with spouse/partner employment in second place across firms of all sizes for the third consecutive year as well. Spouse/partner employment remains higher than most recent years and near the highest levels since the turn of the century. Among firms of all sizes these two factors outstripped housing/mortgage concerns by a wide margin.

# Management Summary

## Relocation Volumes & Budgets (cont.)

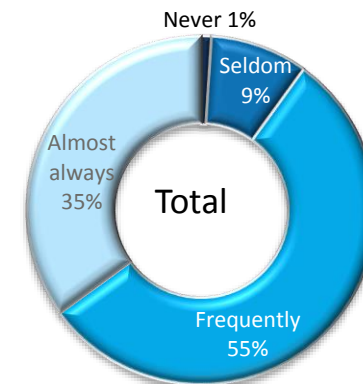
- Most (86%) respondents indicate their firms offered additional incentives or exceptions to policy to encourage employee relocations in 2015, remaining at the highest levels yet after use dropped significantly in 2013 from 2011-2012 (65% vs. 73%+) after progressively increasing from 60% in 2008. As housing/mortgage pressures lessened, far fewer firms offer extending temporary housing benefits the past two years (57% & 58% vs. 72%), although it remains one of the top three incentives/exceptions offered. Relocation bonuses and COLAs round out the top three methods used last year across company size. Although more than half of firms across company size offered extended temporary housing benefits or relocation bonuses and around half or more firms across size offered COLAs, small firms were less likely than large firms to offer COLAs, large firms were the most likely to offer extended temporary housing benefits, and mid-size firms were the most likely to offer relocation bonuses.

By Company Size (Salaried Employees)				
Additional Incentives/Exceptions Offered in 2015* (Top 3)	Total	Less than 500	500-4999	5000+
Extended Temporary Housing Benefits	57%	52%	56%	63%
Relocation Bonuses	56%	56%	61%	51%
Cost-of-Living-Adjustments (COLAs)	50%	44%	52%	54%

\*of those who offered incentives (Q10a)

- Overall, about 9 out of 10 firms said offering extra incentives or exceptions to policy were “almost always” or “frequently” successful in convincing an employee to relocate.

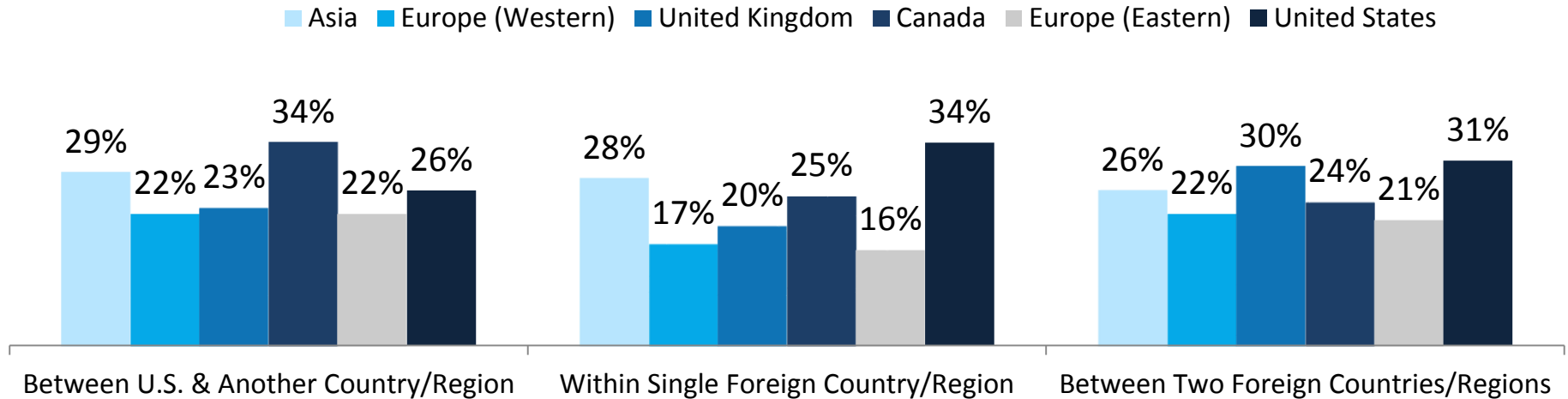
Q.10c – Frequency of Incentive/Exception Success\*



# Management Summary

## Relocation Volumes & Budgets (cont.)

- ❖ Of those who relocated employees in the United States, the most frequent U.S. region destination was the Midwest (31%) followed closely by the Northeast (30%), South (30%), West (25%). The Northeast was the first place destination for large firms (39%), while the Northeast (32%) and South (32%) were tied among mid-size firms, and the Midwest (30%) was first place among small firms.
- ❖ Among firms relocating employees between the U.S. and another country/region, the most frequent destinations of transfer in 2015 were Canadian (34%), Asian (29%), United States (26%), United Kingdom (23%) western European (22%), and eastern European (22%) locations.
- ❖ Intra-country/region transfers occurred most often in the United States (34%), followed by Asian (28%) and Canadian (25%) territories. Continuing expatriate relocations typically occurred between the following countries/regions: United States (31%), United Kingdom (30%), Asia (26%) and Canada (24%).



# Management Summary

## Factors Impacting Relocations

- ❖ The vast majority (85%) of respondents indicate at least one external factor had a significant impact on the number of employee relocations performed in 2015. The lack of qualified local talent remains near previous non-recessionary ranges (42% vs. 47%+) with talent needs outpacing real estate issues by a significant margin for the fifth year in a row, however economic conditions (32%) remains on the higher side of previous recovery ranges. **The real estate market continues it's progressive decline as an issue over the past seven years and falls to the lowest level since measurement began in 2007 (15% vs. 22%).** Economic conditions as a major factor had declined since 2009 (32% vs. 53%) but remains in the elevated range of historical post-recession recovery ranges possibly indicating some residual economic weakness may still be impacting relocations. As in previous years, the impact of these three factors varies by company size.
- ❖ At small firms, talent needs clearly outstripped economic conditions (46% vs. 26%). However, at both mid-size and large firms lack of qualified local talent and economic conditions weighed similarly (39% and 32%, 42% and 38%, respectively), indicating relocation challenges last year continued to be more complex for larger firms. Additionally, the growth of competition (domestic or international) is cited roughly twice as often as a factor in 2014-2015 compared to the previous six years overall. However, talent issues remain at higher levels post-recession and the lower impact of the real estate market are the overarching trends across firms of all sizes, with the percentages of firms citing talent shortfalls standing out as one of the largest drivers of relocation volumes overall last year.

By Company Size (Salaried Employees)				
External Conditions Having Significant Impact (Select 3)	Total	Less than 500	500-4999	5000+
Lack of Qualified People Locally	42%	46%	39%	42%
Economic Conditions	32%	26%	32%	38%
Real Estate Market	15%	14%	12%	19%

# Management Summary

## Factors Impacting Relocations (cont.)

- ❖ While company growth remains in the top spot among individually listed internal conditions for the sixth straight year (fourth year across company size), the percentage of firms citing company growth remains similar to previous recessionary levels despite maintaining a substantial increase over 2009 (39% vs. 24%). However, when all types of expansion are considered (facility, new territories, or international), 37% of firms indicate some form of expansion impacted their relocation volumes last year, nearly equal to company growth, making this a top factor impacting relocations overall. Company growth and combined expansion efforts were some of the top internal factors impacting relocations in 2015 regardless of company size.
- ❖ Among large firms, corporate structure changes (51%) were nearly equal in weight to company growth (46%), with expansion efforts a close third (41%). Large firms were more likely than mid-size or small to indicate some form of corporate structure change impacted relocation volumes last year (51% vs. 32% and 26%), while mid-size and large firms were more likely than small to indicate some form of expansion had an impact (41% and 42% vs. 29%). Far more large firms indicate company growth (46%) as a factor in 2015 than small (34%).
- ❖ Nearly a fourth (22%) of mid-size firms cite budget constraints as a major factor in relocations last year; nearly twice that of small firms (12%).
- ❖ Roughly a fourth of firms across size cited promotions/resignations as a key factor in relocation volumes last year.

Internal Conditions Having Significant Impact (Top Seven)	By Company Size (Salaried Employees)			
	Total	Less than 500	500-4999	5000+
Company Growth	39%	34%	37%	46%
Knowledge/Skills Transfers	33%	34%	29%	36%
Corporate Reorganization/Restructuring	25%	17%	20%	41%
Promotions/Resignations	25%	25%	26%	23%
Expansion into New Territories	20%	12%	24%	24%
Acquisitions/Mergers	19%	12%	19%	28%
Budget Constraints	17%	12%	22%	18%

# Management Summary

## Factors Impacting Relocations (cont.)

- ❖ The majority of responding firms (65%) anticipate their overall financial performances will be better in 2016, up significantly from 2008 (59%) and 2009 (27%) and similar to 2010-2015 (63%+), although markedly below 2006-2007 expectations (74%+). Additionally, 41% expect the U.S. economy to improve as well, similar to 2007, 2010 & 2012 (44%+), significantly above 2008-2009 (10%+) while markedly below 2006, 2011, 2013-2015 (53%+). Expectations for improved performances of individual firms and the overall U.S. economy are at levels far recessionary lows and on par with previous economic growth years, although not as strong as most recent recovery levels. Additionally, roughly half of firms expect global markets (both emerging and developed) to improve this year as well.

By Company Size (Salaried Employees)				
<b>2016 Expectations: Company's Overall Financial Performance</b>	<b>Total</b>	<b>Less than 500</b>	<b>500-4999</b>	<b>5000+</b>
Better than 2015	65%	60%	64%	74%
<b>2016 Expectations: Emerging Global Markets</b>	<b>Total</b>	<b>Less than 500</b>	<b>500-4999</b>	<b>5000+</b>
Better than 2015	48%	50%	41%	53%
<b>2016 Expectations: Developed Global Economies</b>	<b>Total</b>	<b>Less than 500</b>	<b>500-4999</b>	<b>5000+</b>
Better than 2015	48%	49%	48%	47%
<b>2016 Expectations: U.S. Economy</b>	<b>Total</b>	<b>Less than 500</b>	<b>500-4999</b>	<b>5000+</b>
Better than 2015	41%	43%	38%	40%
<b>2016 Expectations: U.S. Real Estate Market</b>	<b>Total</b>	<b>Less than 500</b>	<b>500-4999</b>	<b>5000+</b>
Better than 2015	43%	45%	40%	44%

- ❖ For the seventh year in a row, most firms, regardless of size, expect their overall financial performances to improve. Around half of firms, regardless of size, expect improvement in global markets (emerging & developed), slightly better overall than expectations for the U.S. economy. While not as high as previous years, overall expectations are largely for stability or improvement; very few expect worsening conditions.
- ❖ Expectations for the U.S. real estate market remain more optimistic than recessionary years with 43% expecting improvement, although this is markedly lower than the past three years (52%+). However, most expect stability/improvement; few expect worsening conditions.

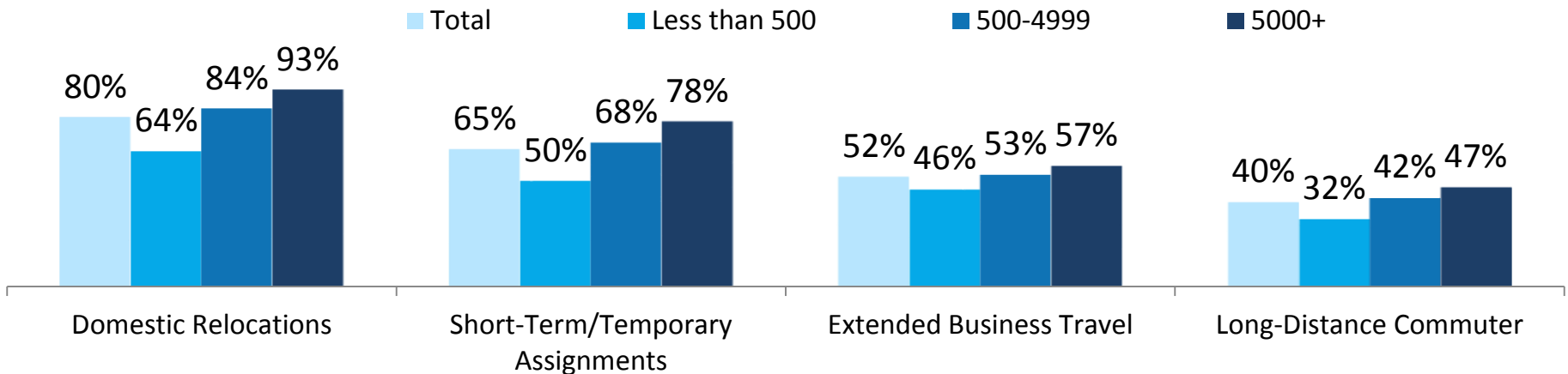


# Management Summary

## Policy Administration

- ❖ Eighty percent of the companies surveyed have a formal domestic relocation policy. Companies with 500-4,999 and 5,000 or more employees are more likely to have a formal domestic relocation policy than are smaller firms (93% of large and 84% of mid-size companies vs. 64% of small).
- ❖ Corporate professionals find themselves responsible for far more formal policy types than in the past; nearly two-thirds (65%) have short-term/temporary assignment policies, over half (52%) have extended business travel policies, and 40% have long-distance commuter policies. More mid-size and large firms manage these additional policy types than small firms overall.

### Relocation Policies



- ❖ Essentially half of participating companies are international (51%), similar to 2015 (50%). Large companies continue to be more likely to operate internationally, as roughly twice as many large companies (78%) are international than small companies (32%; 66% vs. 35% in 2015). The percentage of mid-size firms indicating they are international is similar to nearly all of the past eleven years (46% vs. 48%+), remaining markedly below the highest reported in 2004 (64%).

# Management Summary

## Policy Administration (cont.)

- ❖ Thirty-five percent of the companies involved in this study employ fewer than 500 salaried workers, 35% employ 500-4,999 salaried employees, and 30% employ 5,000 or more salaried employees.
- ❖ Around nine out of ten mid-size (86%) and large (96%) companies surveyed have a centralized department/team that handles relocation, far more than 70% of small companies. The top five responsibilities of centralized relocation departments are: managing domestic relocation programs (61%), development/maintenance of relocation policy (52%), controlling household goods carrier selection (44%), controlling the selection of additional relocation services provider(s) (43%), and managing international relocation programs (39%).

Cost Containment Measures Used in 2015 (Top Seven)	By Company Size (Salaried Employees)			
	Total	Less than 500	500-4999	5000+
No Cost Containment Measures beyond Typical Relocation Policy	24%	30%	26%	16%
Cap Relocation Benefit Amounts	35%	35%	32%	38%
Limit Miscellaneous Allowance Benefits	26%	27%	21%	31%
Review/Renegotiate Supplier Contracts	24%	17%	21%	36%
Offer Pre-Decision Counseling	22%	17%	19%	33%
Offer Short-Term/Extended Travel/Commuter Arrangements (instead of relocation)	18%	17%	16%	21%
Restructure Policy Tiers/Eligibility for Certain Benefits	18%	11%	18%	24%

- ❖ The vast majority of firms worked to contain costs in relocation policy/practice over the past year, and overall use trends higher (76%) than the recessionary peak (2011: 70%). Around a third of firms, regardless of size, capped relocation benefits amounts, and a fifth or more limited miscellaneous allowance benefits. Large firms reviewed/renegotiated supplier contracts and offered pre-decision counseling far more often than mid-size or small firms as methods of cost containment last year.

# Management Summary

## Policy Administration (cont.)

- ❖ The vast majority of large companies have different tiers, or levels, in their relocation policies compared to over half of mid-size and small firms (80% vs. 62% and 54%, respectively). Most firm tier/level policies across company size appear to be based on job/grade level or position/job title. It is worth noting large firms are more likely to indicate new hire/current employee status as key policy criteria compared to smaller firms (37% vs. 23% and 26%) and mid-size firms are the most likely to indicate taking the assignment location/region into consideration (31%).

Top Six Criteria	By Company Size (Salaried Employees)			
	Total	Less than 500	500-4999	5000+
<b>Bases for Different Tiers (or Levels) in Domestic Relocation Policy*</b>				
Job/Grade Level (i.e. staff, management, professional, etc.)	57%	58%	55%	57%
Position/Job Title	55%	58%	53%	54%
New Hire/Current Employee Status	29%	23%	26%	37%
Homeowner/Renter Status	28%	23%	27%	32%
Length of Assignment	24%	18%	25%	27%
Assignment Location/Region	23%	21%	31%	18%
<b>Average Number of Tiers</b>	<b>2.3</b>	<b>1.9</b>	<b>2.1</b>	<b>2.9</b>

\*of those companies with tiers/levels (Q18a-1)

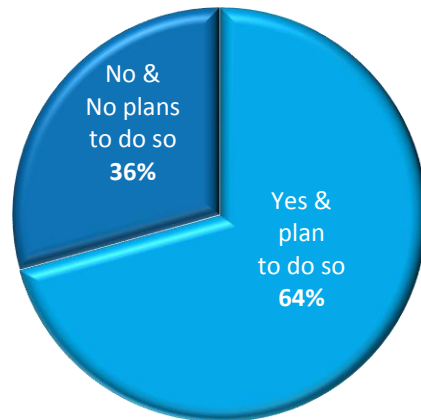
- ❖ Companies vary on the amount of time they allow employees to decide on whether to accept a relocation offer. Around half (51%) of the companies surveyed allow two weeks or less to accept or decline an offer, 33% allow up to 3 weeks or 1 month, and 16% allow up to 2 months or more to decide.
- ❖ Once a relocation is accepted roughly two-thirds of all size firms allow one month or less for an employee to report to work at the new location: 32% firms overall indicate relocating employees have three weeks or less to make this transition. From start to finish, the majority of firms only allow a maximum of seven to eight weeks from job offer to the expectation of an employee starting work at the new location.

# Management Summary

## Policy Administration (cont.)

- ❖ Sixty-four percent of all firms report using alternative assignments, with mid-size (68%) and large (72%) the greatest users. While the percentage of large firms using such arrangements progressively increased from 2012 to 2014 (60%, 62%, 66%) it remains on par with 2015 this year (72% vs. 73%). Usage among mid-size firms remains nearly twice that of 2014 (68% vs. 37%) and similar to 2015 (75%). Usage among small firms inches upwards again over last year (54% vs. 48%) and continues to be more than twice that recorded in 2014 (19%).
- ❖ While the top reason for use in prior years was to meet strategic business goals, there is now no overarching method for their use inside mobility policy that stands out dramatically from the rest; nearly every potential use is indicated by roughly a third or more of firms, regardless of company size.

Q.27—Alternative Assignments Used:



Q.27a—Alternative Assignment Reasons\*:



\*of those using alternative assignments (Q27)

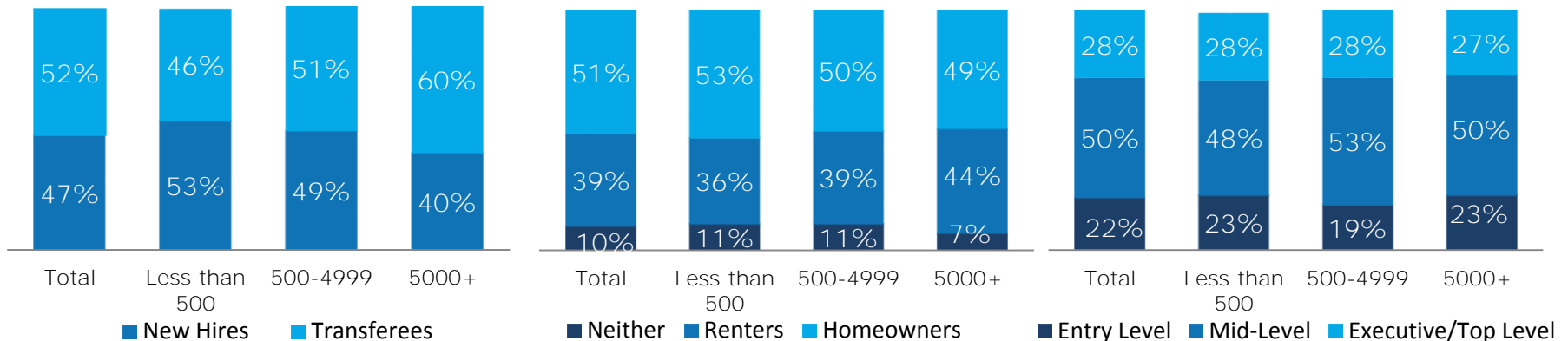
- ❖ Roughly two-thirds of firms across company size see business need as the top consideration for determining if an alternative assignment format will be used; around half of firms overall chose assignment purpose, job function and cost. Assignment purpose dropped last year compared to previous levels (53% vs. 66%+) and dips slightly more this year (48%), with a similar decline occurring for cost (44% vs. 51%, 54% and 64%). Job function dips as well for the first time from historically higher levels (45% vs. 53%+).

# Management Summary

## Policy Administration (cont.)

- ❖ Employees are allowed on average 3.8 expense-paid house-hunting days. Spouses/partners of relocating employees are allowed an average of 1.7 expense-paid house-hunting trips.
- ❖ Overall relocating employee composition was close to evenly split between transferees and new hires, but tilted in favor of transferees overall. Small firms indicate they are slightly more likely to have relocated new hires last year, while mid-size firms are essentially evenly split and large firms are more likely to have relocated transferees. Roughly half of relocated employees were homeowners across company size.
- ❖ For the first time, we asked about the composition of relocations – the percentages of executive/top level, mid-level, and entry level positions. We found that around half of relocations in 2015 were mid-level jobs, a little more than a fourth were executive/top level positions, and roughly a fifth were entry level jobs, regardless of company size.

Q.23–Approximate Percentage of Relocating Employees in 2015:



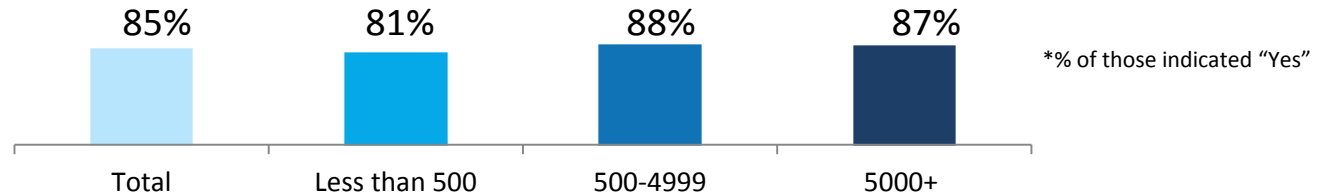
- ❖ Ninety-five percent of decision makers say that the Internet/technology was used for relocation-related matters in 2015. The top use was to communicate via e-mail with relocating employees (80%). Roughly half or more of large companies also used the Internet/technology to complete online forms for employee relocation, initiate/execute employee relocation services, access relocation company website(s) for reporting/other services, or research relocation-related matters.

# Management Summary

## Policy Administration (cont.)

- ❖ In 2013-2014, nearly three-fourths of firms incorporated core/flex elements in their policy; in 2015-2016 nearly 9 out of 10 (85%+) did so. Favored by mid-size and large firms in the past, core/flex usage is now similar across company size.

Q.19a—Percentage of Companies Using Core Coverage/Flex Policy Elements:



- ❖ Coverage for core components, either across all employee levels/categories or dependent on employee level/category, continues to be the most popular choice among all firms. But the percentages of firms offering flexible use of the full relocation benefit or a portion of it remain roughly doubled for the second year in a row except for flexible use of a portion dependent on employee level/category which returns near previous levels. Overall, the top relocation costs **viewed as "core" are** travel expenses (74%), temporary housing (67%), and household goods shipping (64%).

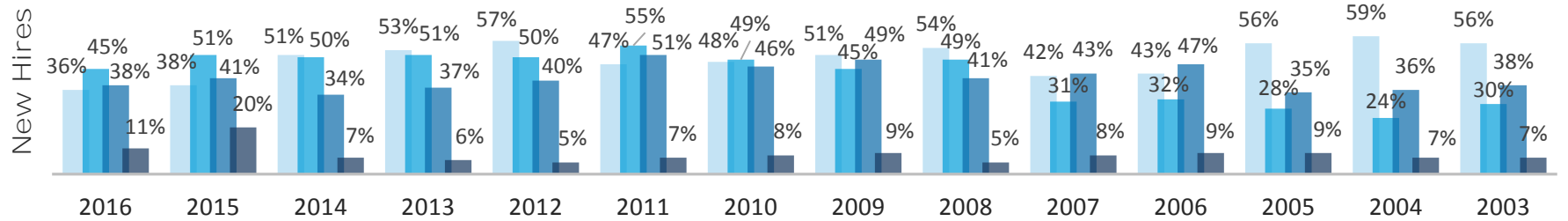
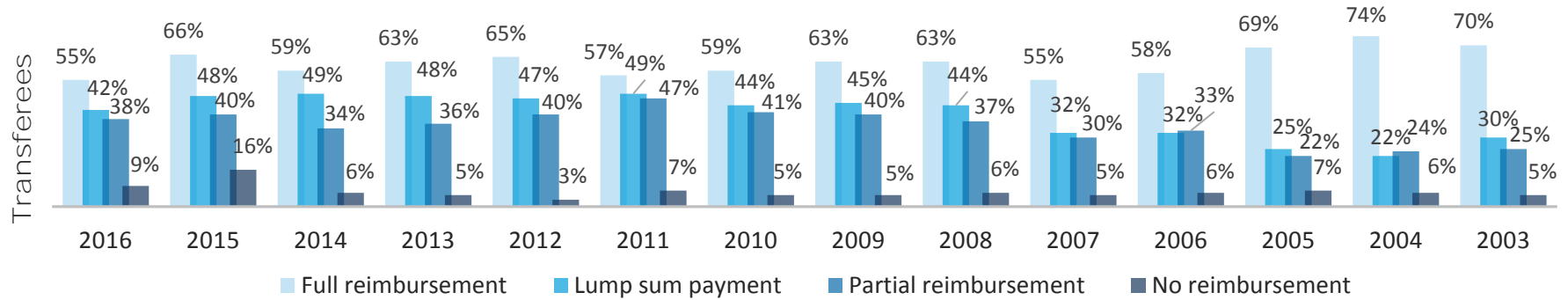
Core Coverage/Flex Policy Elements*	By Company Size (Salaried Employees)			
	Total	Less than 500	500-4999	5000+
Relocation Benefit Coverage of Specific Items (i.e. core components) (all employees)	49%	42%	46%	59%
Relocation Benefit Coverage of Specific Items (i.e. core components) (employee level/category dependent)	44%	40%	43%	50%
Flexible Use of Full Relocation Benefit Coverage Amount (all employees)	30%	29%	35%	26%
Flexible Use of Full Relocation Benefit Coverage Amount (employee level/category dependent)	27%	25%	32%	22%
Flexible Use of a Portion of Relocation Benefit Coverage (all employees)	22%	20%	25%	21%
Flexible Use of a Portion of Relocation Benefit Coverage (employee level/category dependent)	16%	16%	15%	17%

\*of those using core coverage/flex policy (Q19a)

# Management Summary

## Relocation Costs

❖ Following are the methods of reimbursement of relocation expenses for TRANSFEREES and NEW HIRES:



- ❖ For transferees, the percentage of firms using full reimbursement, the most popular method overall, is similar to 2006-2007, 2010, 2011 and 2014 (55%+) but well below historically higher levels of nearly two-thirds or more of firms providing this type of reimbursement. Use of lump sum payments by roughly half of firms is consistent with findings since 2008. Use of partial reimbursement remains similar to most prior years since 2008, and markedly above 2005-2007 (22%+) levels. It is worth noting that the percentage of firms indicating they sometimes offer no reimbursement remains a bit higher compared to historic norms.
- ❖ For the second year, full reimbursement of expenses for new hires (36%) falls to the lowest level historically, remaining out of favor in comparison to lump sum payments (45%). Roughly half of firms have used lump sum payments for new hires since 2008. The percentage of firms using partial reimbursement remains lower than 2011 (38% vs. 51%) indicating lump sum payments continue to be the most popular methods for new hires by a slim margin. Eleven percent indicate occasionally offering no reimbursement.

# Management Summary

## Relocation Costs (cont.)

- ❖ When asked about their overall relocation compositions, mid-size and large firms indicate roughly half (45% and 49%) of their relocations were fully reimbursed, compared to only 36% of small firms. Small firms indicate a higher average of relocations were lump sum only (31%) than at mid-size or large firms (21% and 24%) in 2015. Across company size, firms indicate a fourth or less of their relocations were partially reimbursed.
- ❖ When asked about the composition of their relocations, companies estimate the majority (70%) of their domestic moves last year were traditional/permanent relocations rather than other arrangements, and this percentage was similar across company size.
- ❖ Among companies using lump sums, roughly half or more across company size indicate lump sums were offered travel expenses, temporary housing, or for the entire relocation cost. However, large firms are far more likely to use lump sums for miscellaneous allowances compared to smaller firms. Small and mid-size firms show a greater likelihood than large firms to apply lump sums for the shipping/storage of household goods. Use of lump sums for rental or real estate assistance/transactions is less popular but at similar levels regardless of company size.

By Company Size (Salaried Employees)				
Lump Sum Payment Application*	Total	Less than 500	500-4999	5000+
Travel Expenses	53%	56%	53%	51%
Temporary Housing	50%	48%	50%	52%
Miscellaneous Allowances	49%	49%	38%	59%
Entire Relocation Cost	44%	43%	46%	44%
Household Good Shipping/Storage	44%	45%	51%	34%
Rental Assistance/Transactions	32%	34%	31%	29%
Real Estate Assistance/Transactions	25%	28%	22%	23%

\*of those companies offering lump sum payments (Q31)

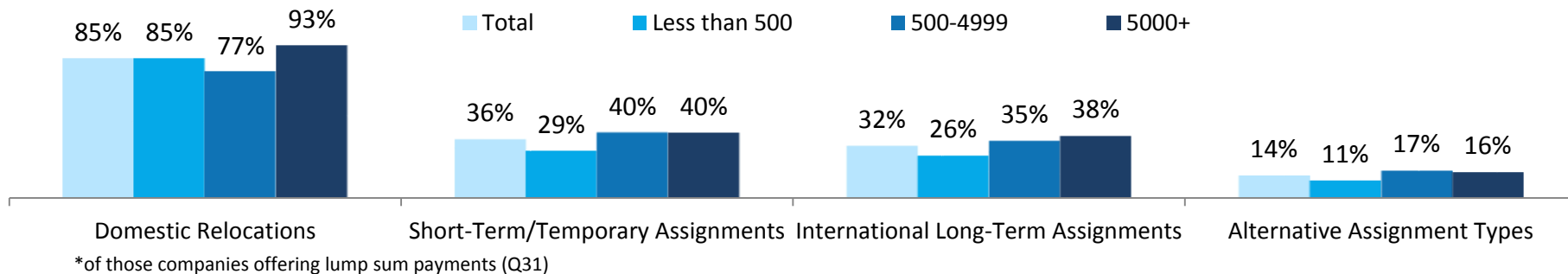


# Management Summary

## Relocation Costs (cont.)

- ❖ In general, executives and experienced professionals are much more likely to receive lump sums than entry level employees (59% & 61% vs. 45%). This is driven by small and mid-size firm differences; large firms indicate offering lump sums more than half the time regardless of employee level. Renters are more likely to receive lump sums than homeowners overall (36% vs. 23%), and this plays out at similar degrees across company size. Large firms offer transferees and new hires lump sums more than half the time; while at mid-size and small firms this occurs only around forty percent of the time on average.
- ❖ Companies using lump sums indicate domestic relocations overwhelmingly as the most frequent application, true for the vast majority of firms of all sizes. Around a third overall use lump sums for short-term/temporary assignments or international long-term assignments. Only around one-seventh of all firms use lump sums for alternative assignments. Mid-size and large firms are more likely than small firms to use lump sums for short-term/temp assignments (40% vs. 29%); they are a bit more likely as well to use them for international long-term assignments (35% and 38% vs. 26%).
- ❖ Nearly all companies track lump sum spending/allocation per employee. Over half (57%) of firms say a Human Resources staff member performs this function, and half say expense report submissions are the method used for tracking. But many other responsible personnel (Relocation, Finance, employee) and methods (Excel, online reports, in-house software) are also used by a fourth or more of firms as well.

**Lump Sum Use: Relocation Types**



# Management Summary

## Relocation Costs (cont.)

Median Lump Sum Amounts Offered*	By Company Size (Salaried Employees)			
	Total	Less than 500	500-4999	5000+
Real Estate Assistance/Transactions	\$5,000-\$9,999	\$5,000-\$9,999	\$5,000-\$9,999	\$1,000-\$4,999
Household Goods Shipping/Storage	\$5,000-\$9,999	\$5,000-\$9,999	\$5,000-\$9,999	\$1,000-\$4,999
Entire Relocation Cost	\$10,000-\$14,999	\$10,000-\$14,999	\$15,000-\$19,999	\$10,000-\$14,999
Rental Assistance/Transactions	\$1,000-\$2,499	\$1,000-\$2,499	\$2,500-\$4,999	\$1,000-\$2,499
Travel Expenses	\$1,000-\$2,499	\$1,000-\$2,499	\$2,500-\$4,999	\$1,000-\$2,499
Temporary Housing	\$2,500-\$4,999	\$2,500-\$4,999	\$2,500-\$4,999	\$2,500-\$4,999
Miscellaneous Allowances	\$1,000-\$2,499	\$1,000-\$2,499	\$2,500-\$4,999	\$2,500-\$4,999

\*of those companies offering lump sum payments (Q31)

- ❖ A question added in 2013 probed the typical ranges offered for the variety of lump sum categories. Looking at the past three years, most offerings are more generous and more frequent than in 2013 and above or on par with 2014, despite some dips below the higher ranges in 2015. Overall, median ranges for real estate assistance/transactions, household goods shipping/storage, and entire relocation costs remain at four year highs, while ranges for rental assistance/transactions, travel expenses, temporary housing, and miscellaneous allowances dip one range lower.
- ❖ Median amounts offered by large and small firms were the same for the following categories (mid-size firms were slightly more generous): entire relocation cost (\$10,000-\$14,999), rental assistance/transactions (\$1,000-\$2,499), and travel expenses (\$1,000-\$2,499). Median amounts offered by small and mid-size firms were the same for the following categories (large firms were slightly less generous): real estate assistance/transactions (\$5,000-\$9,999) and household goods shipping/storage (\$5,000-\$9,999). The median amount offered by mid-size and large firms for miscellaneous allowances was the same (\$2,500-\$4,999), with small firms slightly less generous. The median amount offered for temporary housing was the same across company size (\$2,500-\$4,999).

# Management Summary

## Relocation Costs (cont.)

- ❖ For TRANSFEREES or NEW HIRES, reimbursement/payment for relocation services depends on employee level with mid-level and executive/top level employees having a far greater chance of receiving coverage for specific items. Nearly half or more firms overall offer the following coverage for executive/top level moves:

Cost Coverage (Top 5)*	Total		
	Entry Level	Mid-Level	Executive/Top Level
Move an Automobile	32%	55%	61%
Pack All Items	33%	55%	60%
Move a Second Automobile	17%	33%	48%
Unpack all Items	22%	33%	45%
Move Exercise Equipment	24%	38%	44%

- ❖ For TRANSFEREES or NEW HIRES who are homeowners buying a new home whether or not they are offered assistance specific to their status as homeowners depends on employee level as well with mid-level and executive/top level employees receiving support more often than entry level employees. Nearly half of firms overall offer the following assistance for executive/top level moves:

Homeowner Assistance (Top 3)*	Total		
	Entry Level	Mid-Level	Executive/Top Level
Offer Homefinding Trips	25%	44%	49%
Offer Temporary Housing Allowance	26%	45%	46%
Reimburse/Pay for Home Sale Costs	20%	33%	45%

# Management Summary

## Relocation Costs (cont.)

- ❖ For TRANSFEREES or NEW HIRES who will be renting in the new location whether or not they are offered assistance specific to their status as renters depends on employee level as well with mid-level and executive/top level employees receiving help more often than entry level employees. Roughly half of firms overall offer the following assistance for mid-level and executive/top level moves:

	Total		
Renter Assistance (Top 3)*	Entry Level	Mid-Level	Executive/Top Level
Reimburse/Pay Lease Cancellation	33%	47%	51%
Offer Temporary Housing Allowance	29%	44%	50%
Offer Homefinding Trips	29%	45%	48%

- ❖ The majority of companies reimburse or pay for some relocation costs for transferees or new hires regardless of employee level, however around a sixth of firms on average are opting to either not cover costs or offer lump sums instead. The majority of firms offer specialized relocation assistance for either homeowners or renters as well, but overall around a fifth on average indicate they are opting to not offer assistance or offer lump sums instead for both situations.
- ❖ The biggest trends overall are that for relocation services costs, entry level employee coverage levels generally vary little across company size, while at the mid-level coverage is somewhat more generous among large firms than smaller, although nearly half of individual cost coverage levels are similar. It is at the executive/top level that company size plays the largest role, with coverage levels far higher at large firms compared to smaller companies across most individual items overall.
- ❖ For homeowner and renter assistance, levels of assistance offered for entry level relocations vary little across company size for most assistance items. For mid-level relocations, larger firms in general are markedly more willing to provide assistance across most categories overall. At the top level, large firms by far provide the highest levels of assistance, and mid-size firms are more generous than small firms across multiple categories.

# Management Summary

## Employee, Spousal & Assistance Issues

- ❖ The following is the makeup of those employees relocated in 2015:
  - *Sixty-five percent of companies surveyed indicate that the age range of their most frequently relocated employee is 30 to 40 years of age, and 85% of the companies surveyed indicate some percentage of the employees they relocated last year were women.*
  - *Eighty-five percent of companies indicate some percentage of their relocations involved a trailing spouse who was a wife or female partner; a similar percentage (79%) of companies indicate that some percentage of their relocations had accompanying husbands/male partners as well.*
  - *Ninety percent of companies indicate some percentage of their relocations involved employees with children.*
- ❖ Roughly half (49%) of companies surveyed provide some type of elder care assistance to the relocating employee. This year for the first time provision of this benefit is similar across company size; larger firms in the past were more likely to offer this assistance. Overall, for the second year this is far more than has been offered historically (49% vs. 15%-26%) and has increased substantially across company size.
- ❖ Sixty-two percent of companies surveyed provide some type of childcare assistance to the relocating employee. This year for the first time provision of this benefit is similar across company size; larger firms in the past were more likely to offer this assistance. Overall, for the second year this is far more than has been offered historically (62% vs. 31%-43%) and has markedly increased across company size. The most popular assistance methods are to provide lists of childcare options.
  - *Provide list of childcare providers/services and/or agencies (32%)*
  - *Provide list of local schools/educational options (32%)*
  - *Provide paid personal leave days (27%)*
- ❖ From 2012-2014, around half of firms reported performing assessments on candidates prior to relocation. Since last year, more than three-fourths now state this is policy. The most popular method is to conduct assessments for all relocations (46%) similar to last year (48%) and roughly double previous levels (21%, 2012-2014) and this is similar across company size. Past years saw far more differences in the use of candidate assessments and types of implementation among firms of different sizes. This year, those differences are minimized and the usage levels overall for both assessments and implementation methods are mostly similar, regardless of company size.

# Management Summary

## Employee, Spousal & Assistance Issues (cont.)

- ❖ The majority (87%) of companies surveyed allow the hiring of spouses of employees.
- ❖ Sixty-three percent of companies indicate the spouse's/partner's employment almost always or frequently affects an employees relocation, similar to last year (62%) and remaining far higher than at any time over the previous twelve years (63% vs. roughly half or less). Less than a third indicate an employee's willingness to relocate is seldom affected by his/her spouse's/partner's employment status, and only seven percent of respondents state this never affects an employee's relocation.
- ❖ Nearly two-thirds (61%) of companies surveyed assist an employee's spouse/partner in finding employment in the new location. Spousal/partner employment assistance levels remain far higher than ever before both overall and across company size. However, for the first time this year, we see similar levels across company size, rather than as a likely perk among mid-size and large firms.
- ❖ At firms offering this assistance, around a third (31%) of relocated employees with spouses/partners utilized this assistance in 2015, the same as 2011 and up slightly from around a fourth in 2007-2010, 2012-2013.
- ❖ Overall, the top method of spousal/partner assistance is providing networking assistance across company size, with around a third offering resume preparation assistance. In the past, far more differences appeared in types of assistance by company size; this year levels are more consistent for most items.

	By Company Size (Salaried Employees)			
Spouse/Partner Employment Assistance* (Top 5)	Total	Less than 500	500-4999	5000+
Provide Networking Assistance	44%	45%	46%	41%
Provide Resume Preparation Assistance	33%	30%	39%	30%
Provide Interviewing Skills Training	30%	26%	34%	30%
Find Employment Within Company	26%	23%	32%	24%
Pay for Outplacement/Career Services	25%	16%	27%	32%

\*of those companies offering assistance (Q39b)

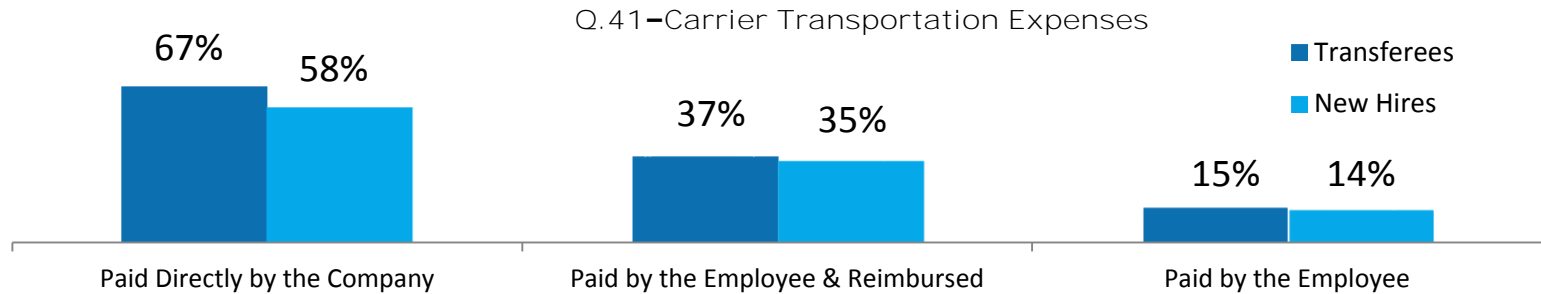
# Management Summary

## Supplier Management

- ❖ At 37% of the companies surveyed, the company is the sole selector of the household goods carrier for the **employee's relocation**. Forty-two percent of the companies surveyed allow the employee some say in the household goods carrier selection, but employees of small and mid-size firms are more likely to have this option than those of large firms (58% and 43% vs. 21%, respectively). More than a fourth (29%) of large companies hand off selection to a relocation firm, more often than mid-size (20%) and small firms (10%).

Who Selects Carrier for Employee Relocations	By Company Size (Salaried Employees)			
	Total	Less than 500	500-4999	5000+
The Company	37%	30%	35%	49%
The Company & Employee Together	22%	30%	24%	10%
The Employee	20%	28%	19%	12%
A Relocation Firm	19%	10%	20%	29%

- ❖ The majority of firms report that carrier transportation expenses are “paid directly by the company”; however, around four out of ten of small and mid-size firms indicate costs are employee paid then reimbursed.
- ❖ Mid-size and small firms typically have the Human Resources department perform carrier selection (62% & 71%), whereas large firms utilize the Relocation department for this decision almost equally with HR (52% vs. 53%). Mid-size and large firms involve Procurement more often than small firms (23% vs. 12%).

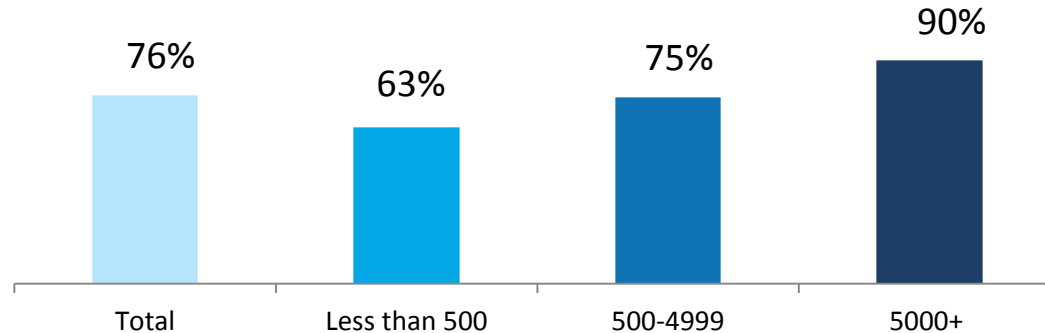


# Management Summary

## Supplier Management (cont.)

- ❖ Seventy-six percent of all companies outsourced relocation services in 2015. However, only 63% of small companies outsourced, while 75% of mid-size and 90% of large companies outsourced relocation services.

Q.40—Percentage of Companies Outsourcing in 2015:



- ❖ For mid-size and small firms, the department most often involved in selecting the relocation service, HRO or brokerage firm is Human Resources (80% & 74%), while at large firms, Relocation and Human Resources have more similar likelihoods of involvement in selection (47% & 59%). Procurement is twice as likely to be involved in the discussion at large firms than small (30% vs. 15%).
- ❖ Roughly a fourth or more of companies responding outsourced the following in 2015:
  - *Real estate sales/marketing (28%)*
  - *Contract of household goods carrier (27%)*
  - *Counseling about the planning & details of relocation (26%)*
  - *Management of full relocation program (24%)*
  - *Coordination and monitoring of shipment (24%)*



# Management Summary

## International

- ❖ Forty-eight percent of companies surveyed relocate employees internationally: 34% of small companies, 44% of mid-size companies, and 70% of large companies.
- ❖ Fifty percent of these companies indicate their international relocation volumes increased in 2015, with roughly half of firms across company size experiencing increases. While the overwhelming majority of firms relocating internationally saw volumes remain level or increase last year across company size, it is worth noting 20% of large firms saw some decreases.
- ❖ Forty-four percent of firms overall expect increases in international relocation volumes in 2016. Overall expectations vary little by company size: roughly half of small and mid-size firms expect increases in international relocations, while large firms are only slightly less optimistic: 40% expect increases. However, the vast majority of firms regardless of size expect either further improvement or stability in international relocation volumes in the coming year.

	By Company Size (Salaried Employees)			
2016 Expectations: International Relocation Volumes*	Total	Less than 500	500-4999	5000+
Increase Significantly	17%	19%	21%	14%
Increase Somewhat	27%	30%	24%	27%
Stay About the Same	45%	43%	46%	45%
Decrease Somewhat	9%	8%	4%	13%
Decrease Significantly	3%	0%	6%	2%

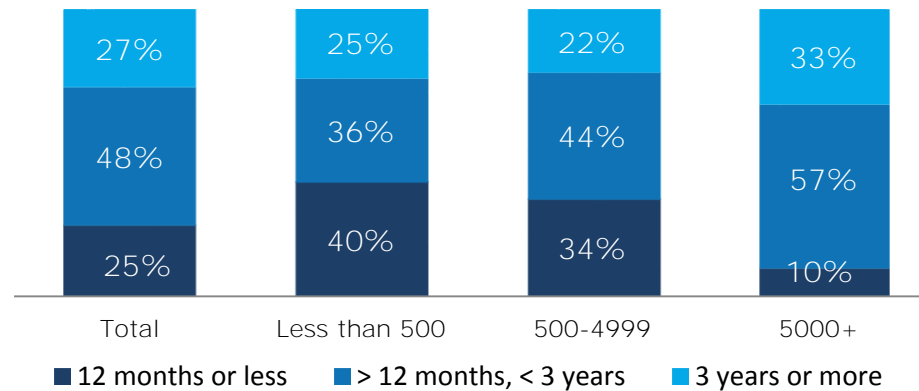
\*of those who relocate internationally (Q2)

# Management Summary

## International (cont.)

- ❖ Overall, the traditional long-term assignment comprises the greatest amount of international relocations: nearly half of all relocations fall into this category. However, both short-term/temporary assignments and permanent transfers also used: shorter assignments comprise around a sixth of international relocations across company size, permanent transfers roughly one-fourth or more.
- ❖ When asked about reimbursement for international relocations, it is worth noting that overall on average firms estimate only a fourth of their international relocations were fully reimbursed last year, and only 6% were lump sum payment only.
- ❖ There are some marked differences by company size regarding the typical international assignment length. Far more small and mid-size firms indicate the typical international assignment duration is less than 12 months compared to large firms (40% and 34% vs. 10%), while large firms favor traditional assignment lengths of 1-3 years comparatively (57% vs. 36% and 44%). It is worth noting that while around a fourth of small and mid-size firms also indicate longer-term assignments are the norm, standard usage among large firms trends just a bit higher than among smaller firms.

Q.43c—Typical International Assignment Duration



\*of those who relocate internationally (Q2)

# Management Summary

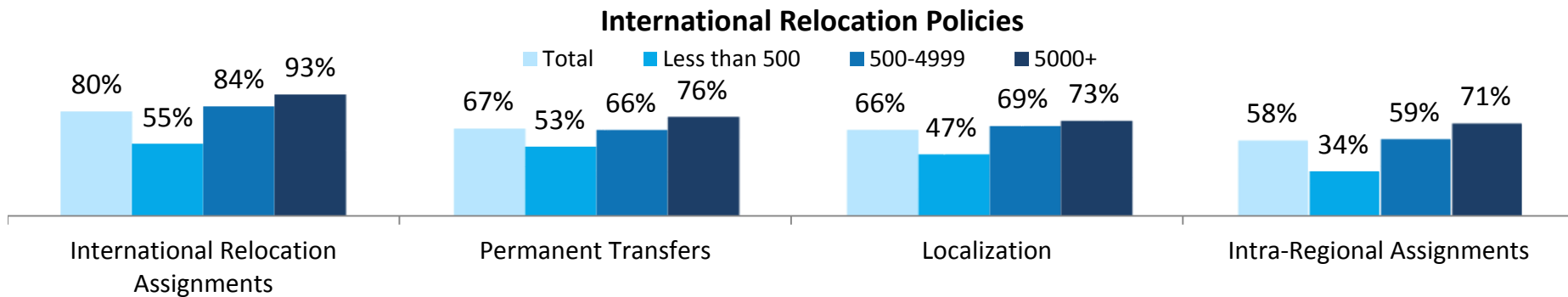
## International (cont.)

- Most firms of all sizes expect their usage level of short-term/temporary assignments to increase or remain level. Very few expect decreases. Small and large firms are less likely to expect increases (40% and 39%) compared to mid-size firms (50%).

2016 Expectations: Short-Term Intl Assignment Use*	Total	Less than 500	500-4999	5000+
Increase Significantly	11%	9%	15%	10%
Increase Somewhat	32%	30%	35%	30%
Stay About the Same	48%	55%	37%	52%
Decrease Somewhat	7%	2%	10%	6%
Decrease Significantly	3%	4%	3%	2%

\*of those who relocate internationally (Q2)

- The vast majority of firms relocating employees internationally have a formal international relocation assignments policy (80%); mid-size and large firms are most likely to have this in place (84% & 93%). The majority also have formal policies for permanent transfers (67%), localization (66%) and intra-regional assignments (58%); more mid-size and large firms manage these additional policy types than small firms overall.



\*of those who relocate internationally (Q2)

# Management Summary

## International (cont.)

- ❖ Six out of ten firms or more relocating employees internationally have different tiers, or levels, in their international relocation policies across company size. Tier/level policies appear to be based on job/grade level or position/job title most commonly overall. However, assignment length (38%), assignment location/region (37%) and assignment objectives (34%) carry much more weight internationally than domestically (24%, 23%, and 17%), while the relative weights of other factors are more similar between international and domestic status.

Bases for Different Tiers (or Levels) in International Relocation Policy* (Top 6)	By Company Size (Salaried Employees)			
	Total	Less than 500	500-4999	5000+
Position/Job Title	59%	55%	63%	58%
Job/Grade Level (i.e. staff, management, professional, etc.)	52%	45%	50%	57%
Length of Assignment	38%	31%	40%	40%
Assignment Location/Region	37%	38%	45%	30%
Assignment Objectives (i.e. developmental, etc.)	34%	34%	28%	38%
New Hire/Current Employee Status	33%	21%	33%	40%
<b>Average Number of Tiers</b>	<b>2.2</b>	<b>2.3</b>	<b>2.2</b>	<b>2.3</b>

\*of those who relocate internationally (Q2) with tiers/levels (Q43g-1)

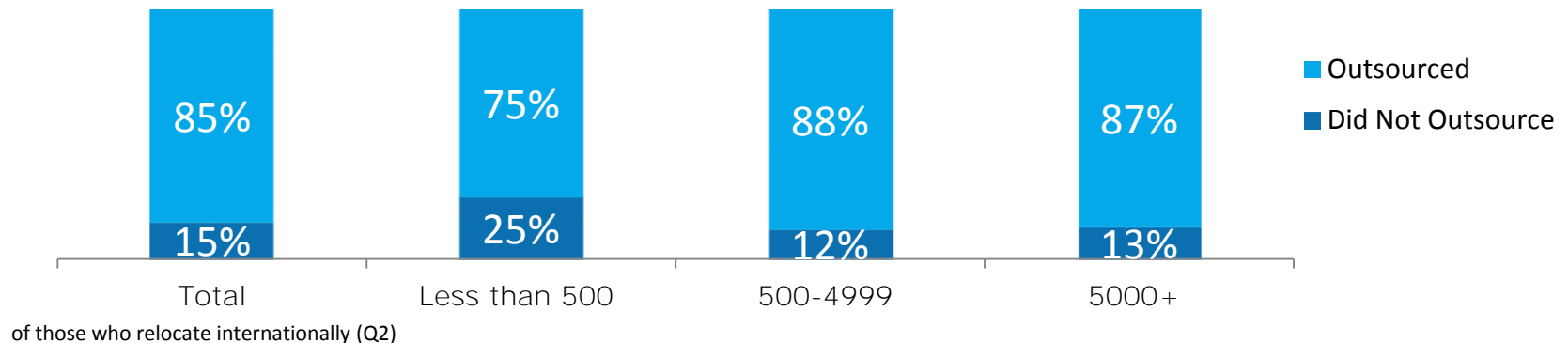
- ❖ The vast majority (91%) indicate there are differences between their domestic and international relocation policies, near the highest percentage historically. However, even as more firms differentiate their policies, the percentages of firms offering certain benefits remain lower than two years ago: additional tax considerations (42% vs. 61%) and allowances for children to attend certain schools (39% vs. 54%). Other policy considerations retain their stark increases: additional leave time (33% vs. 18%) and extended per diems (24% vs. 11%). Firms maintained increases in financial services assistance compared to previous levels (36% vs. 18% in 2012) as well, although many other considerations in policy remain below historical highs.
- ❖ Of companies surveyed who relocate employees internationally, more than forty percent offer: higher relocation allowances (42%), additional tax considerations (42%), international transportation allowance (42%), and additional leave time with a visit back to home country (42%).

# Management Summary

## International (cont.)

- ❖ Eighty-five percent of companies who relocate employees internationally indicate they outsourced an international relocation service in 2015, remaining above the historic high (77%) in 2011 and at the highest level measured historically. Of those companies who outsourced relocation services domestically, the percentage that also outsourced internationally is the second highest historically (95%), just under the 2014 level (98%) surpassing 2011 & 2013 (88%+) and significantly above all previous levels measured in 2003, 2008-2010, 2012 (81%+) and 2004-2007 (70%+).
- ❖ International outsourcing remained similar to 2014 or declined for most service categories, with levels falling in either the mid or lower ranges historically. Three areas saw marked declines in outsourcing compared to the previous year: coordination/monitoring of international shipment (28% vs. 36%), management of international relocation program (24% vs. 35%), and arrangement of **family's international** transportation (22% vs. 30%). While outsourcing across categories in 2015 for mid-size and large firms mostly declined or essentially stabilized compared to the previous year, small firms saw greater stability across categories with some marked increases over 2014: visa and immigration services (38% vs. 20%), counseling about company policy concerning international relocation (26% vs. 14%), and family temporary accommodations arrangements (21% vs. 11%).
- ❖ Both mid-size and large firms are more likely to outsource internationally than small firms in general, and mid-size and large firms continue to outsource a greater variety of services than small firms do.

Q.43j – Outsourced Internationally in 2015\*:



# Management Summary

## International (cont.)

- ❖ Sixty-seven percent of companies that relocate employees internationally indicate they offer assistance to **internationally transferred employees' spouses/partners in finding employment in the new location**. Although lower than last year (77%) it far exceeds 2007-2014 (38% to 46%) and is significantly above 2003-2005 (27%, 22%, & 24%). For the second year in a row, the majority of firms regardless of company size offer employment help to a relocated spouse/partner (62% small, 69% mid-size and 67% large).
- ❖ Overall, around a seventh of companies that relocate employees internationally report no international relocations were declined or failed in 2015. The issue that presented the greatest challenges for international relocations was family issues/ties across company size. Lack of spousal/partner assistance was the second largest reason given by large firms, while for small firms it was personal reasons. Lack of spousal/partner assistance and personal reasons tied for second place as reasons given by mid-size firms.

Reasons Cited for Declined/Failed Intl Relocation*	Total	Less than 500	500-4999	5000+
No International Relocations Declined or Failed	14%	25%	13%	9%
Family Issues/Ties	46%	47%	41%	48%
Lack of Spousal/Partner Assistance	29%	21%	28%	35%
Personal Reason (non-disclosed)	29%	30%	28%	29%
Lack of Adaptability by the Spouse/Partner	24%	21%	26%	23%
Financial Issues/Concerns	20%	13%	21%	23%
Lack of Adaptability by Employee	19%	21%	16%	19%
Safety Concerns (i.e. war/terrorism/political unrest, etc.)	13%	6%	18%	14%
Host Country Infrastructure Inadequacies	12%	8%	18%	10%
Job Performance Issues	10%	4%	15%	10%
Illness	10%	8%	15%	7%

\*of those who relocate internationally (Q2)

# Management Summary

## Corporate/Respondent Profile

- ❖ Similar to last year, Service (44%) and Manufacturing/Processing (25%) firms are the most highly represented business classifications in this study (40% and 31% in 2015).

Business Classification	Total
Service	44%
Manufacturing/Processing	25%
Financial	13%
Wholesale/Retail	10%
Government/Military	3%
Other	5%

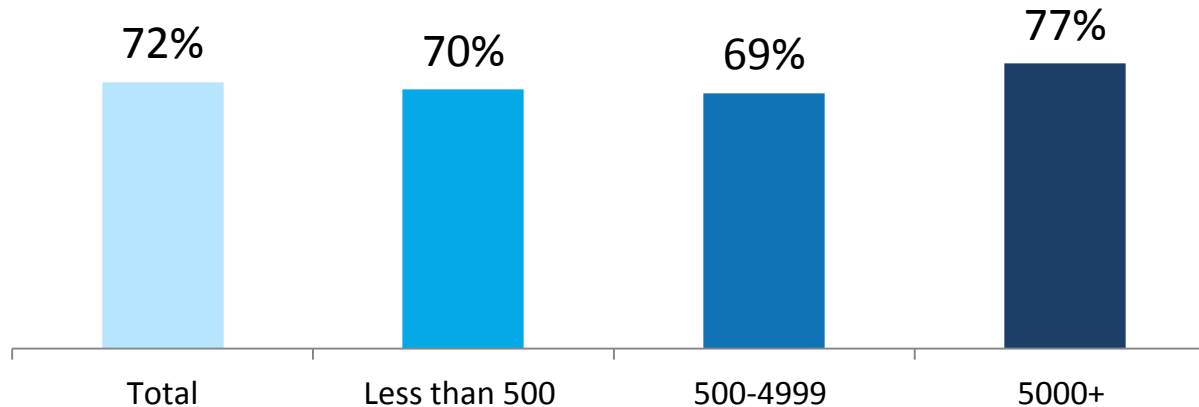
- ❖ The median annual sales range for all companies involved in this study is \$250 million - \$749 million. The median annual sales range for companies with less than 500 employees is \$51-\$249 million, while for companies with 500-4,999 employees it is \$500 million - \$1 billion, and for companies with more than 5,000 employees it is over \$1 billion.
- ❖ Most respondents (89%) work in Human Resources/Personnel or Relocation/Mobility Services departments. At small and mid-size firms the vast majority of respondents are from Human Resources (84% and 79%). At large firms more respondents work in Human Resources than Relocation/Mobility Services (64% and 22%), but around a fourth of participants work in relocation-specific departments compared 12% or less at smaller firms.
- ❖ There are a variety of different positions held among those who completed this survey – managers (33%), directors (25%), vice-presidents (12%), and relocation administrators (7%), as well as supervisors, coordinators, assistants and others.

# Management Summary

## Corporate/Respondent Profile (cont.)

- ❖ A overwhelming majority of respondents regularly read trade publications (84%); the most popular publications were\*:
  - *HR Magazine* (46%)
  - *Human Resource Executive* (31%)
  - *HR News* (30%)
  - *Employee Benefits News* (25%)
  - *Workforce* (24%)
  - *Mobility* (22%)
- ❖ Seventy-two percent of all employees interviewed belong to a relocation-related association, and 77% of responding employees at large companies belong to one of these associations\*:

Q.49– Association Membership:



\* Note: the responses to these questions may have been influenced by the respondent lists used to gather data for this survey.



# Relocation Volumes & Budgets

*Q.1 – Number of Employees Relocated in 2015*

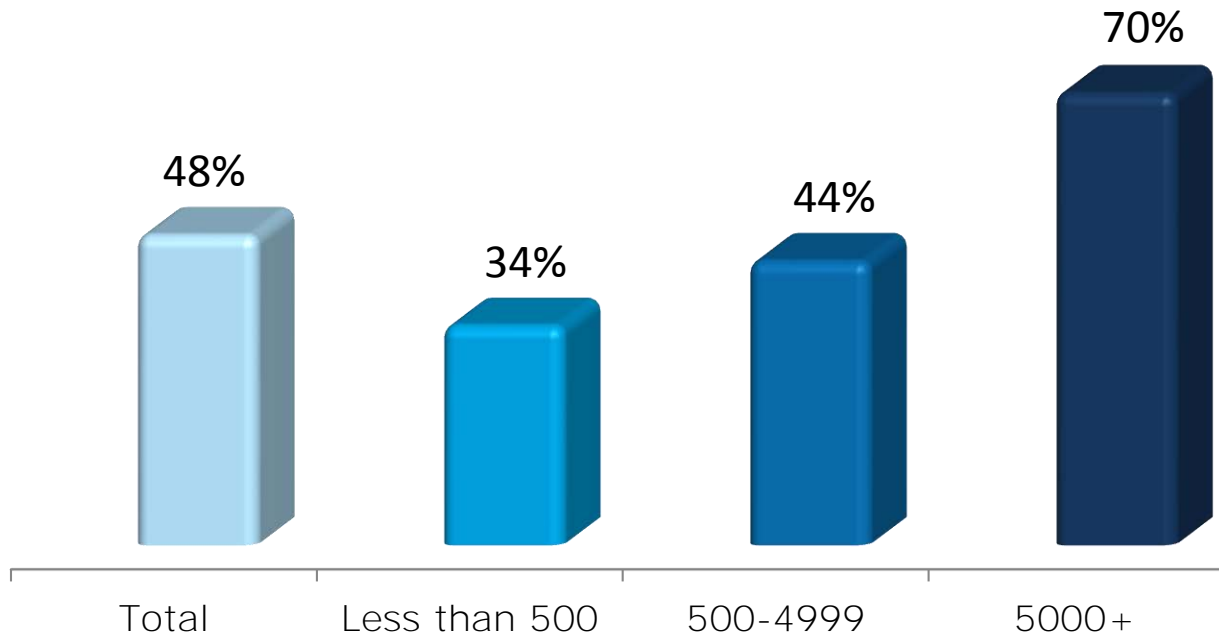
By Company Size (Salaried Employees)

	Total	Less than 500	500-4999	5000+
None	3%	5%	2%	1%
1 – 9	26%	54%	17%	3%
10 – 19	10%	13%	11%	5%
20 – 49	12%	10%	19%	5%
50 – 99	12%	5%	18%	13%
100 – 199	12%	7%	14%	16%
200 – 399	9%	1%	10%	18%
400 or more	16%	5%	8%	38%
<b>Median</b>	<b>20 – 49</b>	<b>1 – 9</b>	<b>50 – 99</b>	<b>200 – 399</b>

# Relocation Volumes & Budgets

Q.2 – Companies that Relocate Employees Between Countries\*

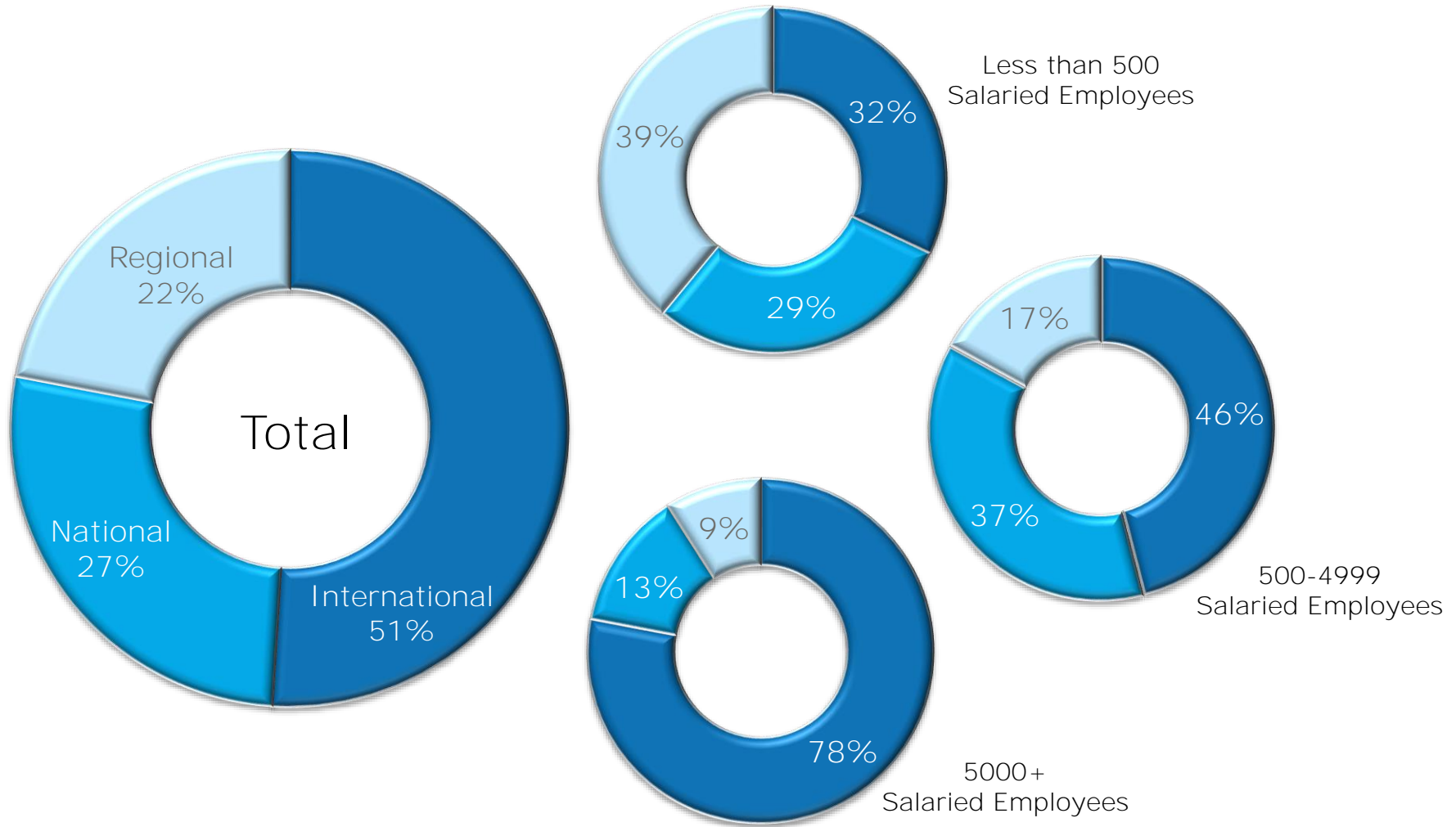
By Company Size (Salaried Employees)



\* % of companies answering "Yes"

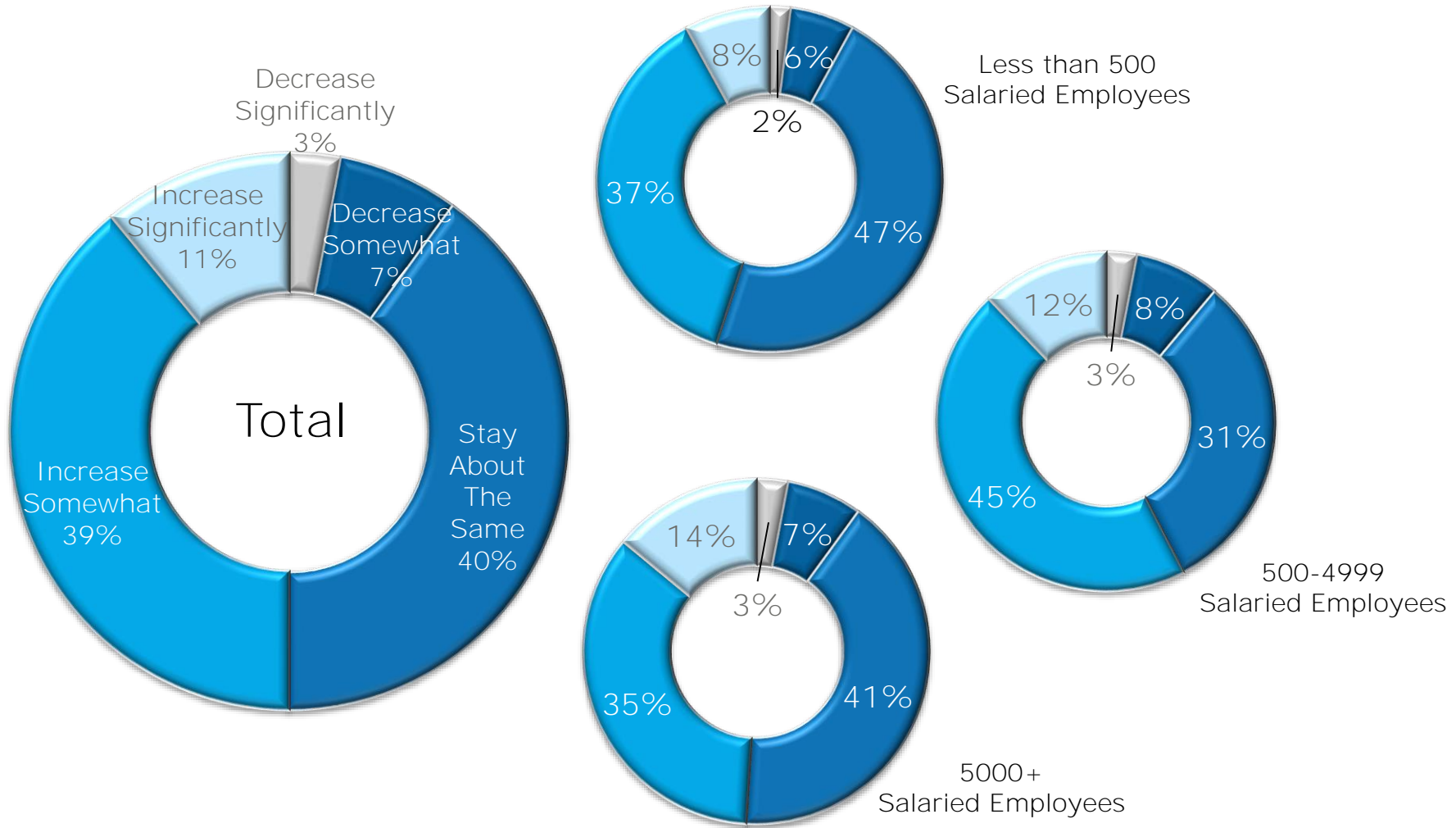
# Relocation Volumes & Budgets

Q.3 – Is Your Company...



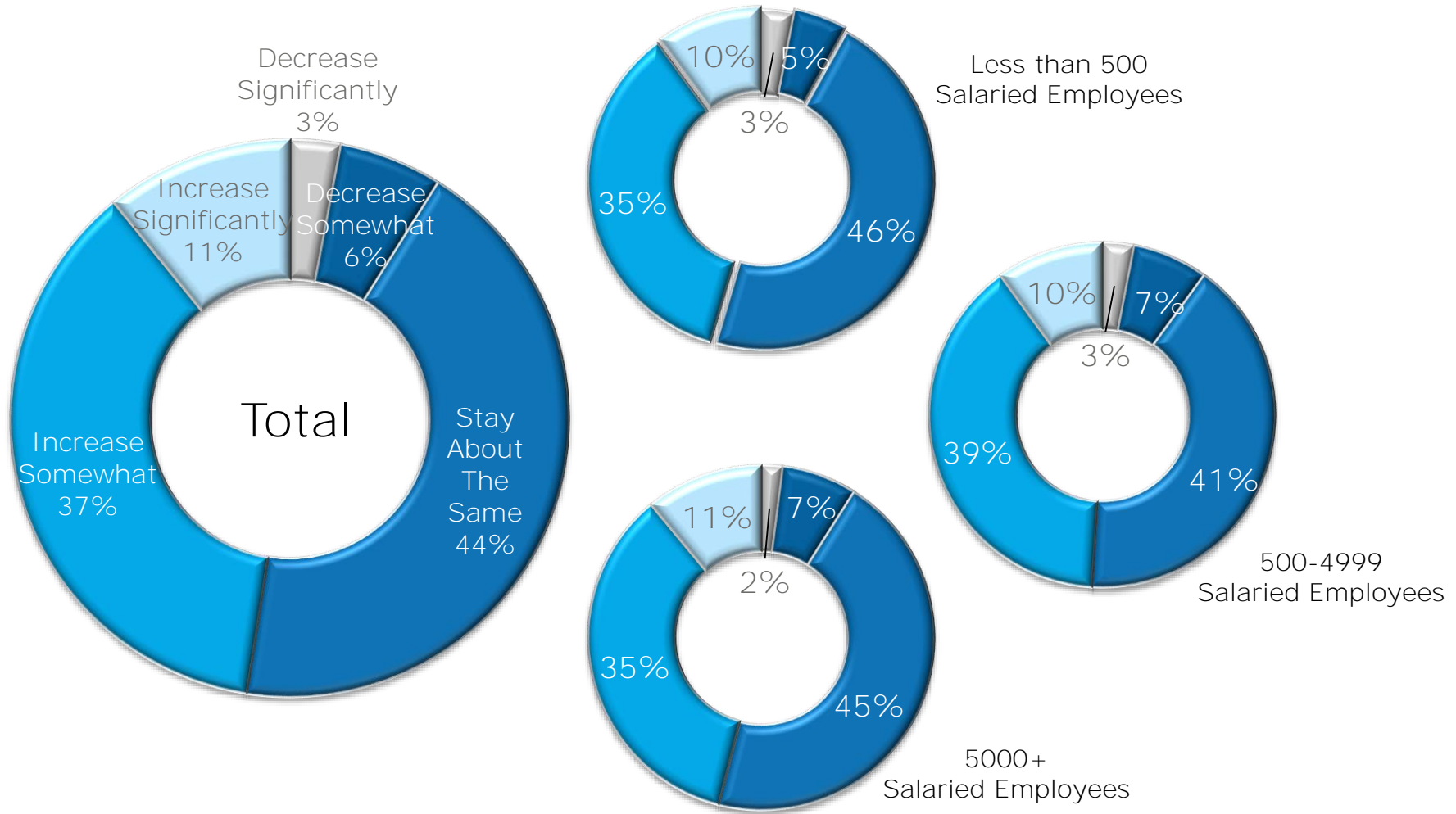
# Relocation Volumes & Budgets

Q.4 – Compared to 2014, Did the Number of Employees You Relocated in 2015...



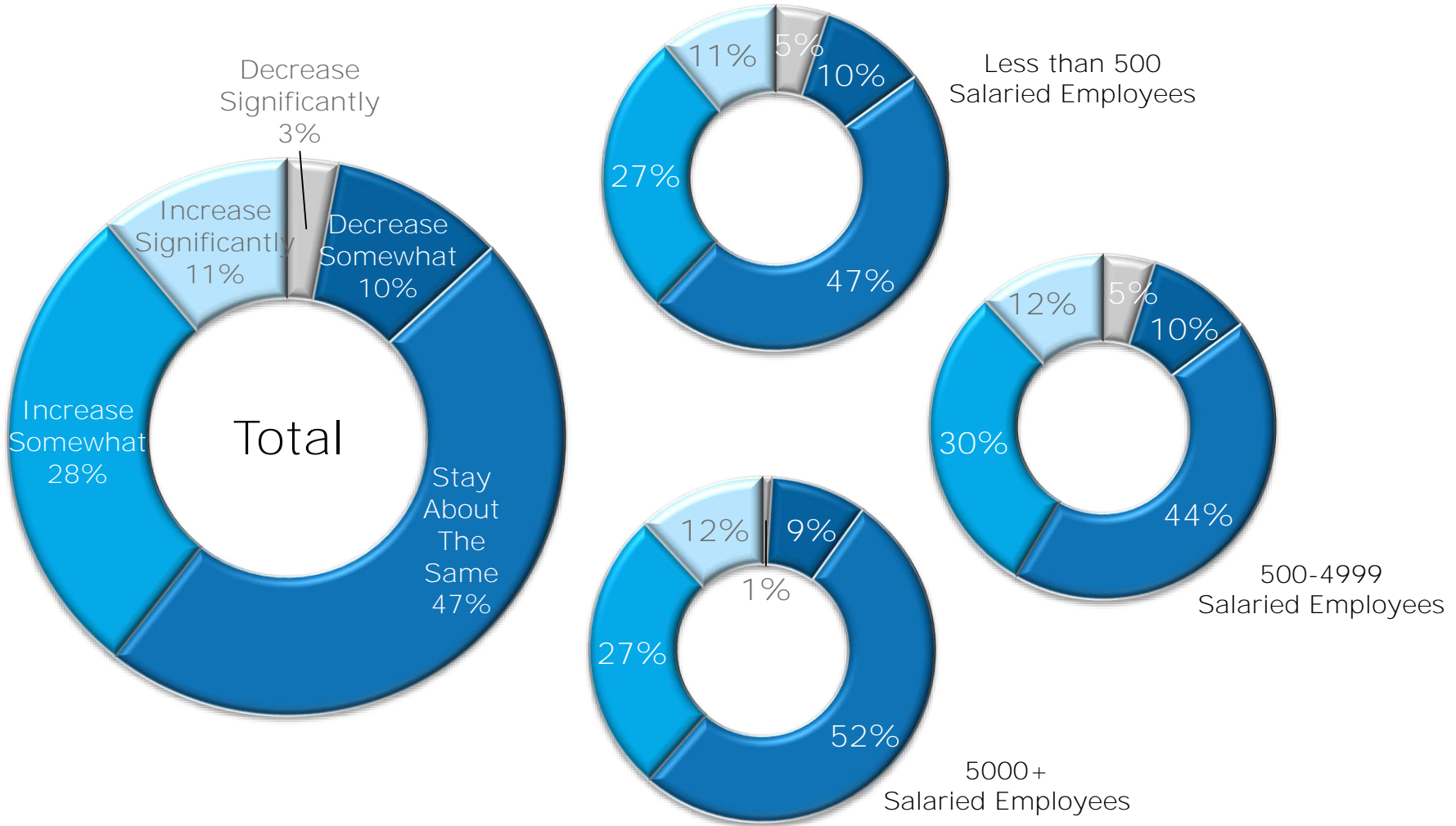
# Relocation Volumes & Budgets

Q.5 – Compared to 2014, Did Your 2015 Relocation Budget...



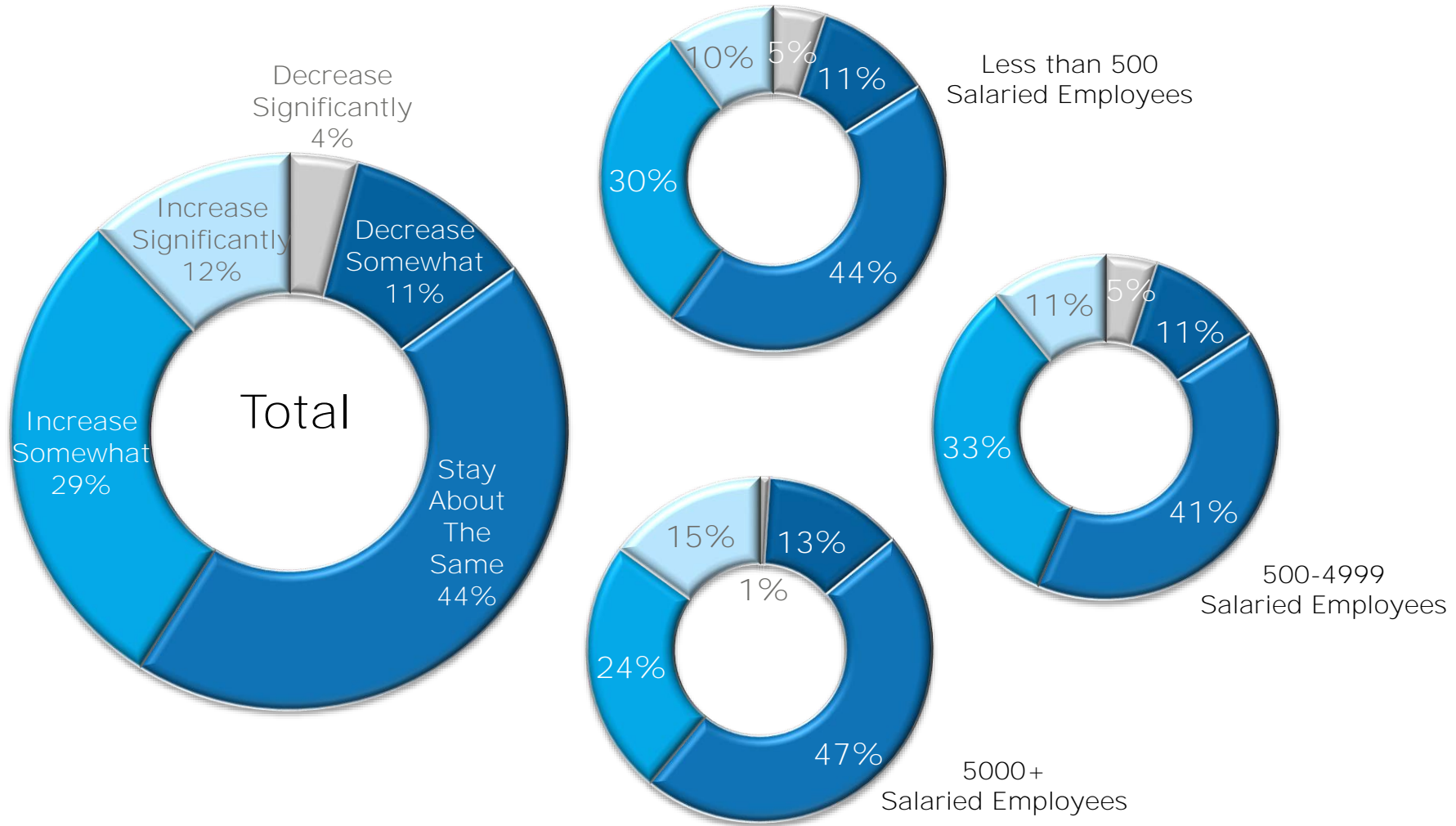
# Relocation Volumes & Budgets

Q.6 – Compared to 2015, Do You Anticipate that the Number of Employees Your Company Will Relocate During 2016 Will...



# Relocation Volumes & Budgets

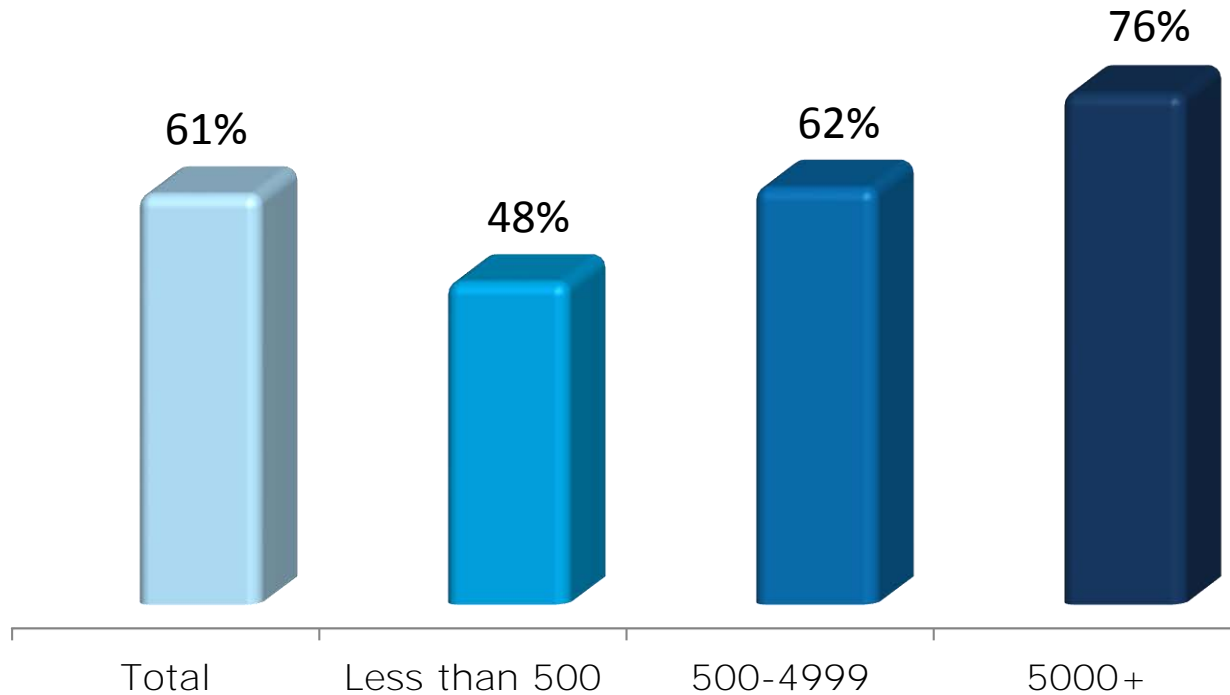
Q. 7 – Compared to 2015, Do You Anticipate that Your Relocation Budget in 2016 Will...



# Relocation Volumes & Budgets

Q.8 – Companies that had Employees Decline the Opportunity to Relocate in 2015\*

By Company Size (Salaried Employees)



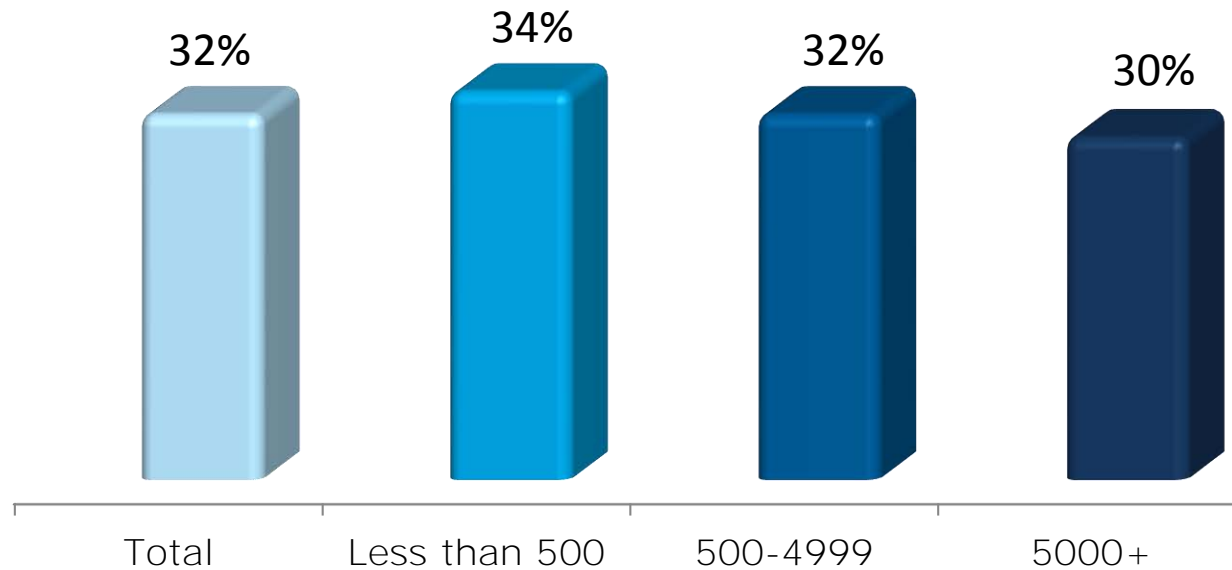
\* % of companies answering "Yes" / excludes those who don't know



# Relocation Volumes & Budgets

Q.9 – Companies Indicating Declining Relocation Usually Hinders an Employee’s Career\*

By Company Size (Salaried Employees)

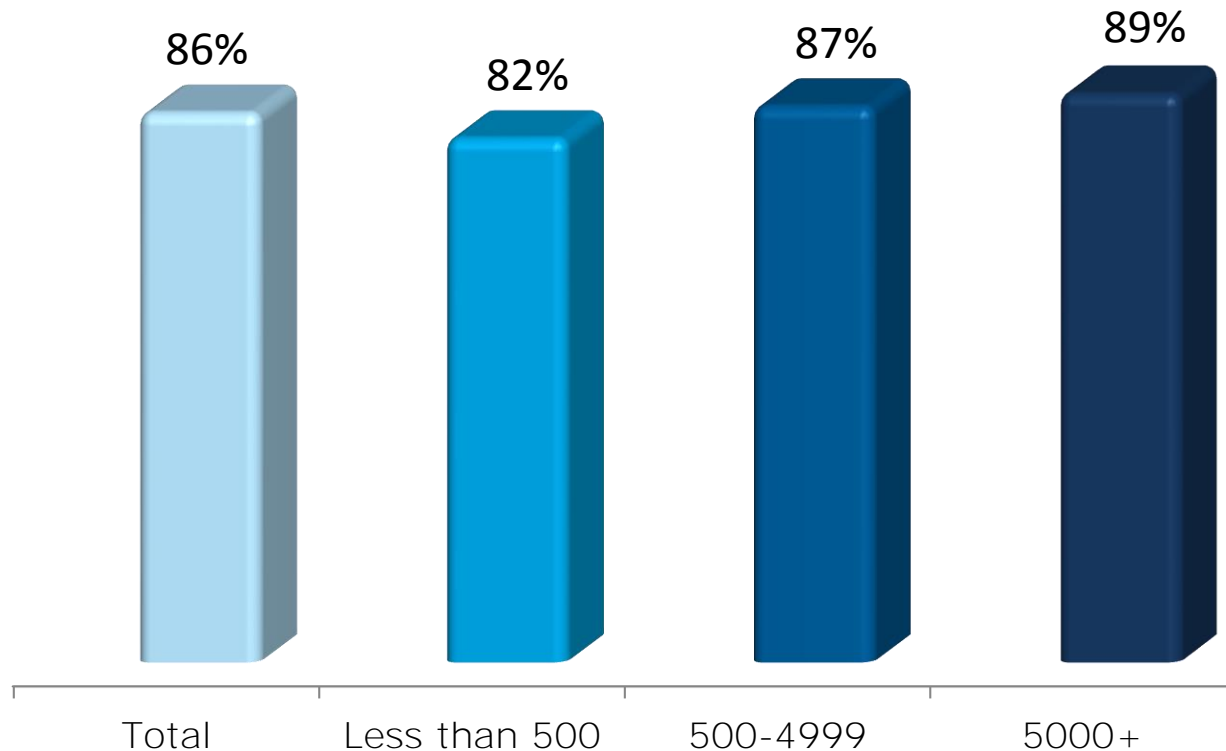


\* % of companies answering "Yes"

# Relocation Volumes & Budgets

*Q. 10a – Companies Indicating They Offered Non-Standard Additional Incentives or Exceptions to Encourage Employee Relocations in 2015\**

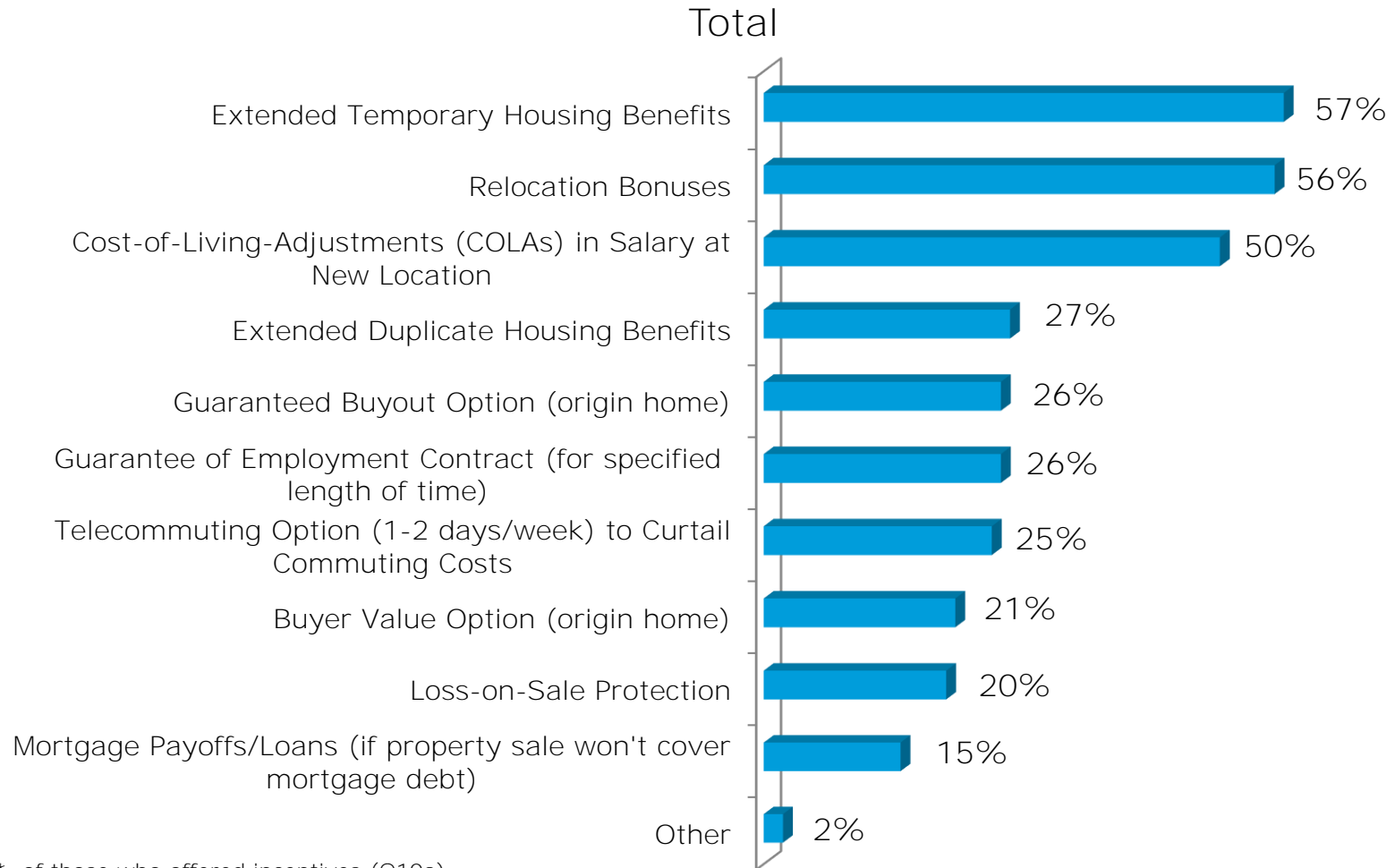
By Company Size (Salaried Employees)



\* % of companies indicating "Yes"

# Relocation Volumes & Budgets

*Q. 10b – Additional Non-Standard Incentives or Exceptions Offered By Companies to Encourage Employee Relocations in 2015\**



\* of those who offered incentives (Q10a)

# Relocation Volumes & Budgets

*Q. 10b – Additional Non-Standard Incentives or Exceptions Offered By Companies to Encourage Employee Relocations in 2015\**

By Company Size (Salaried Employees)

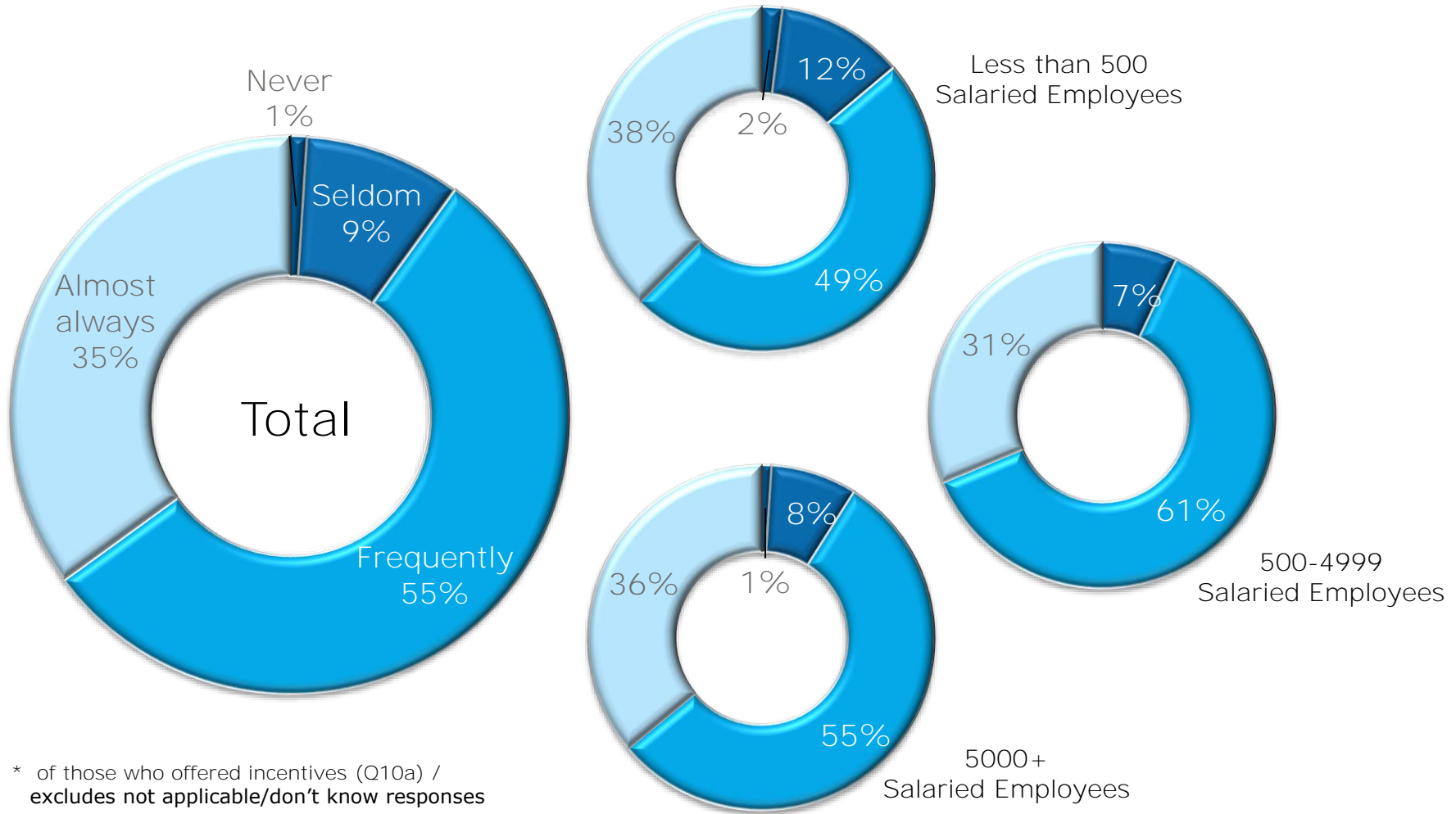
<b>Additional Incentives or Exceptions Offered</b>	<b>Total</b>	<b>Less than 500</b>	<b>500-4999</b>	<b>5000+</b>
Extended Temporary Housing Benefits	57%	52%	56%	63%
Relocation Bonuses	56%	56%	61%	51%
Cost-of-Living Adjustments (COLAs) in Salary at New Location	50%	44%	52%	54%
Extended Duplicate Housing Benefits	27%	23%	27%	32%
Guaranteed Buyout Option (origin home)	26%	13%	25%	40%
Guarantee of Employment Contract (for specified length of time)	26%	26%	29%	22%
Telecommuting Option (1-2 days/week) to Curtail Commuting Costs	25%	28%	21%	26%
Buyer Value Option (origin home)	21%	13%	21%	32%
Loss-on-Sale Protection	20%	7%	19%	37%
Mortgage Payoffs/Loans (if property sale won't cover employee mortgage debt)	15%	13%	14%	18%
Other	2%	2%	1%	4%

\* of those who offered incentives (Q10a)



# Relocation Volumes & Budgets

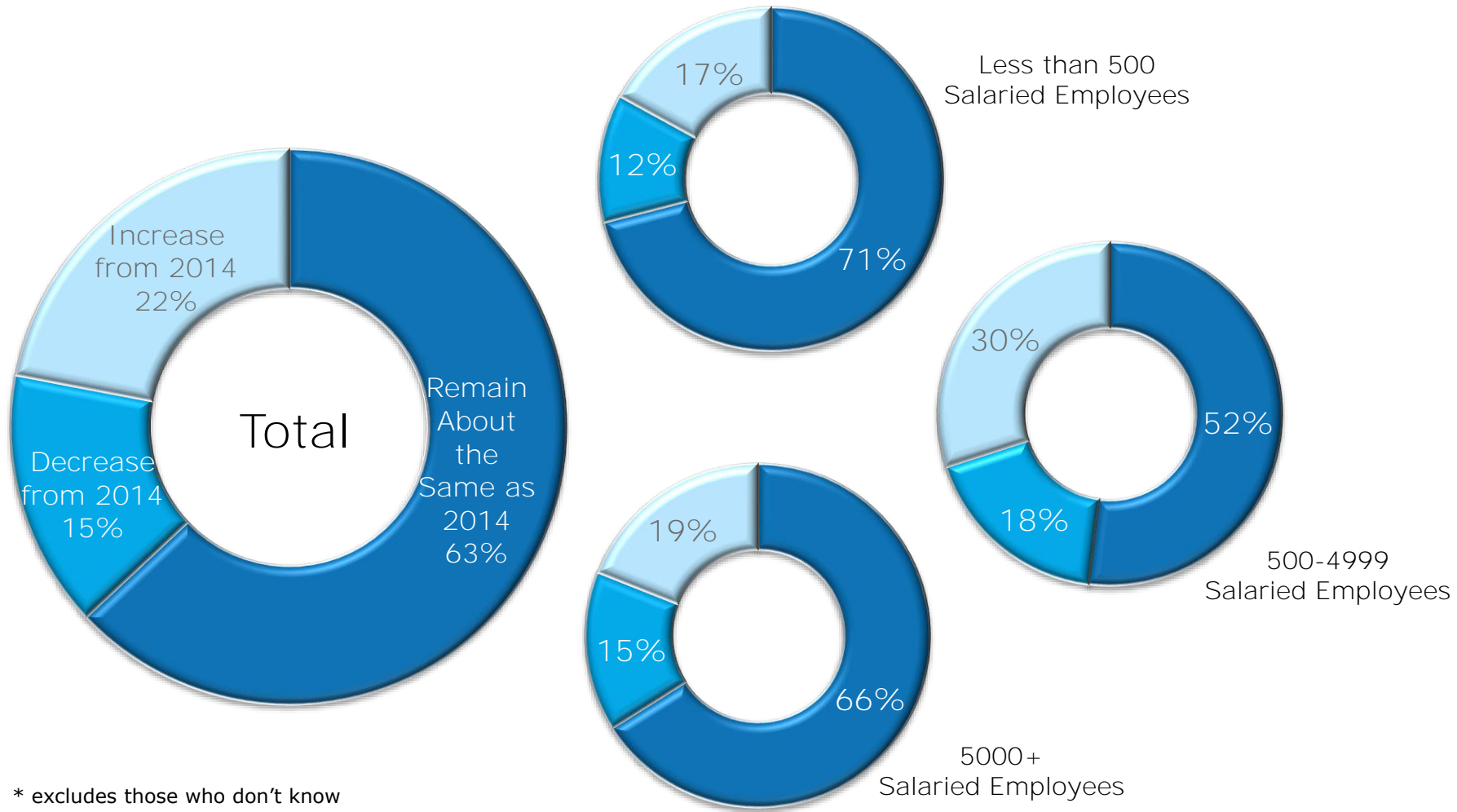
Q.10c – Frequency of Incentives or Exceptions Proving Successful in Convincing an Employee to Relocate\*



\* of those who offered incentives (Q10a) / excludes not applicable/don't know responses

# Relocation Volumes & Budgets

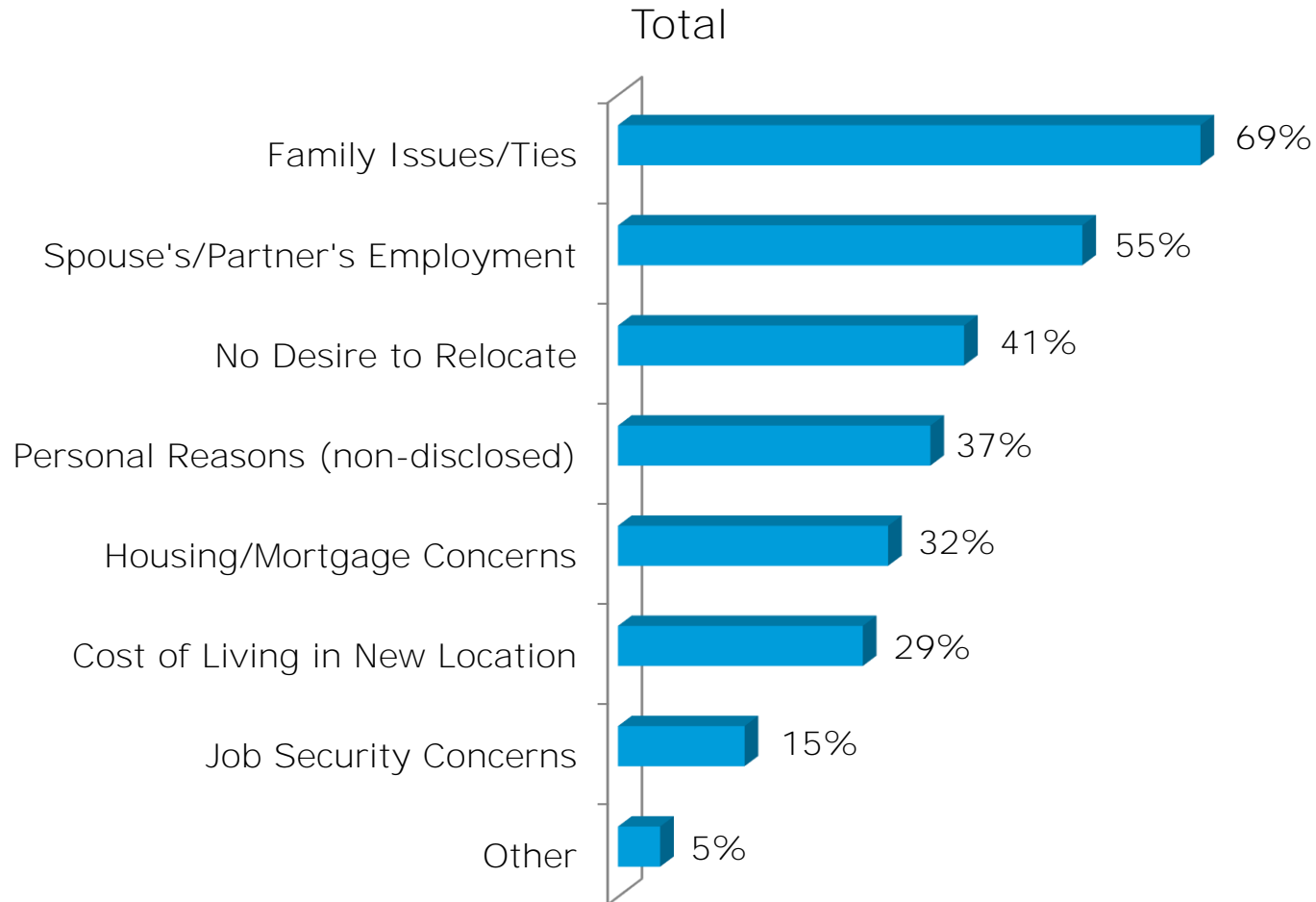
Q. 11 – Did the Number of Employees Declining Relocation in 2015...\*



\* excludes those who don't know

# Relocation Volumes & Budgets

Q. 11a – Reasons Employees Gave for Declining Relocation\*



\* of companies who had declined relocations in 2015 (Q8)

# Relocation Volumes & Budgets

*Q.11a – Reasons Employees Gave for Declining Relocation\**

By Company Size (Salaried Employees)

Reasons for Declined Relocation	Total	Less than 500	500-4999	5000+
Family Issues/Ties	69%	74%	72%	62%
Spouse's/Partner's Employment	55%	53%	55%	57%
No Desire to Relocate	41%	47%	41%	37%
Personal Reasons (non-disclosed)	37%	40%	33%	38%
Housing/Mortgage Concerns	32%	36%	32%	28%
Cost of Living in New Location	29%	29%	25%	33%
Job Security Concerns	15%	16%	17%	13%
Other	5%	0%	2%	12%

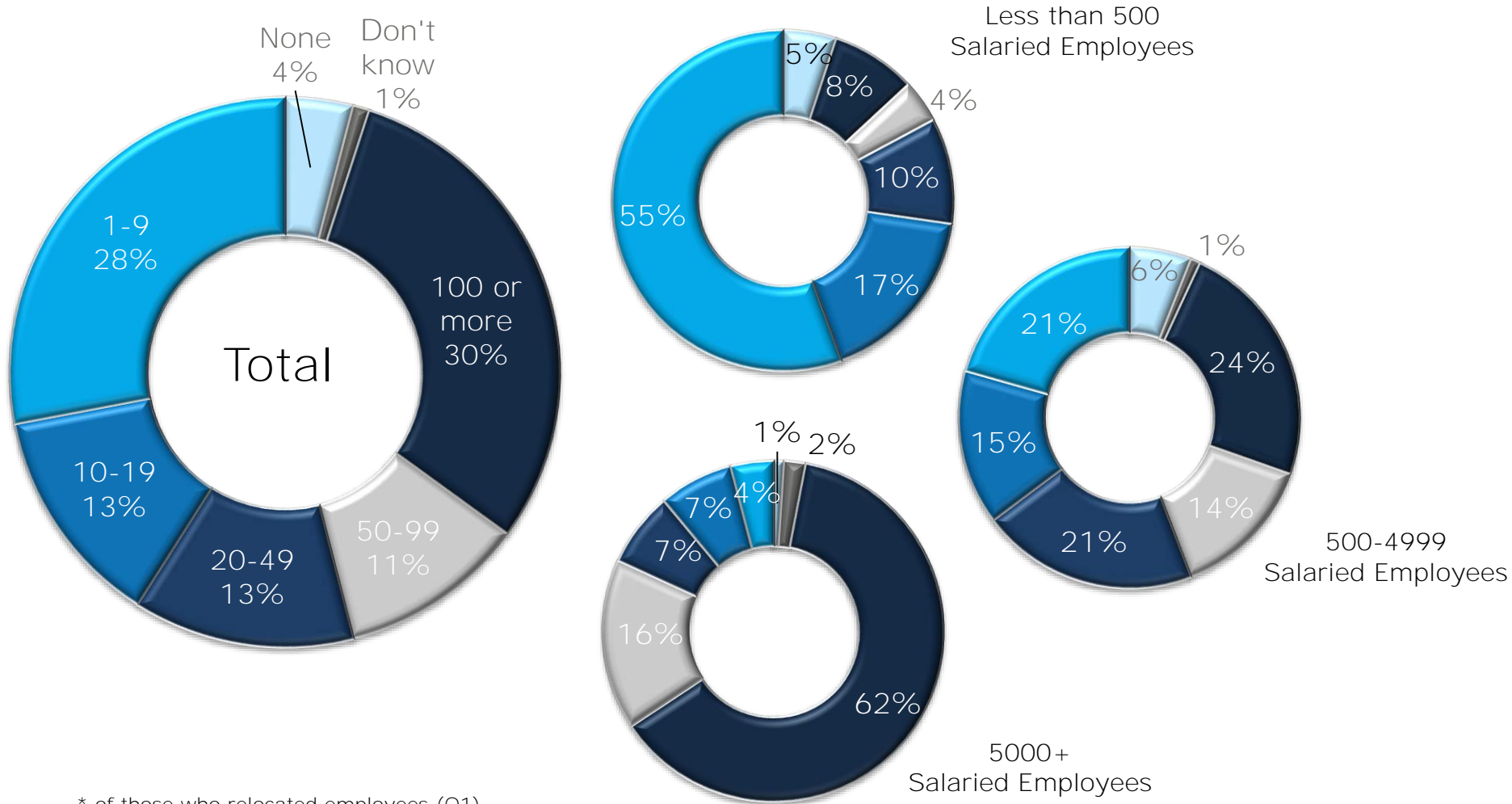
\* of companies who had declined relocations in 2015 (Q8)





# Relocation Volumes & Budgets

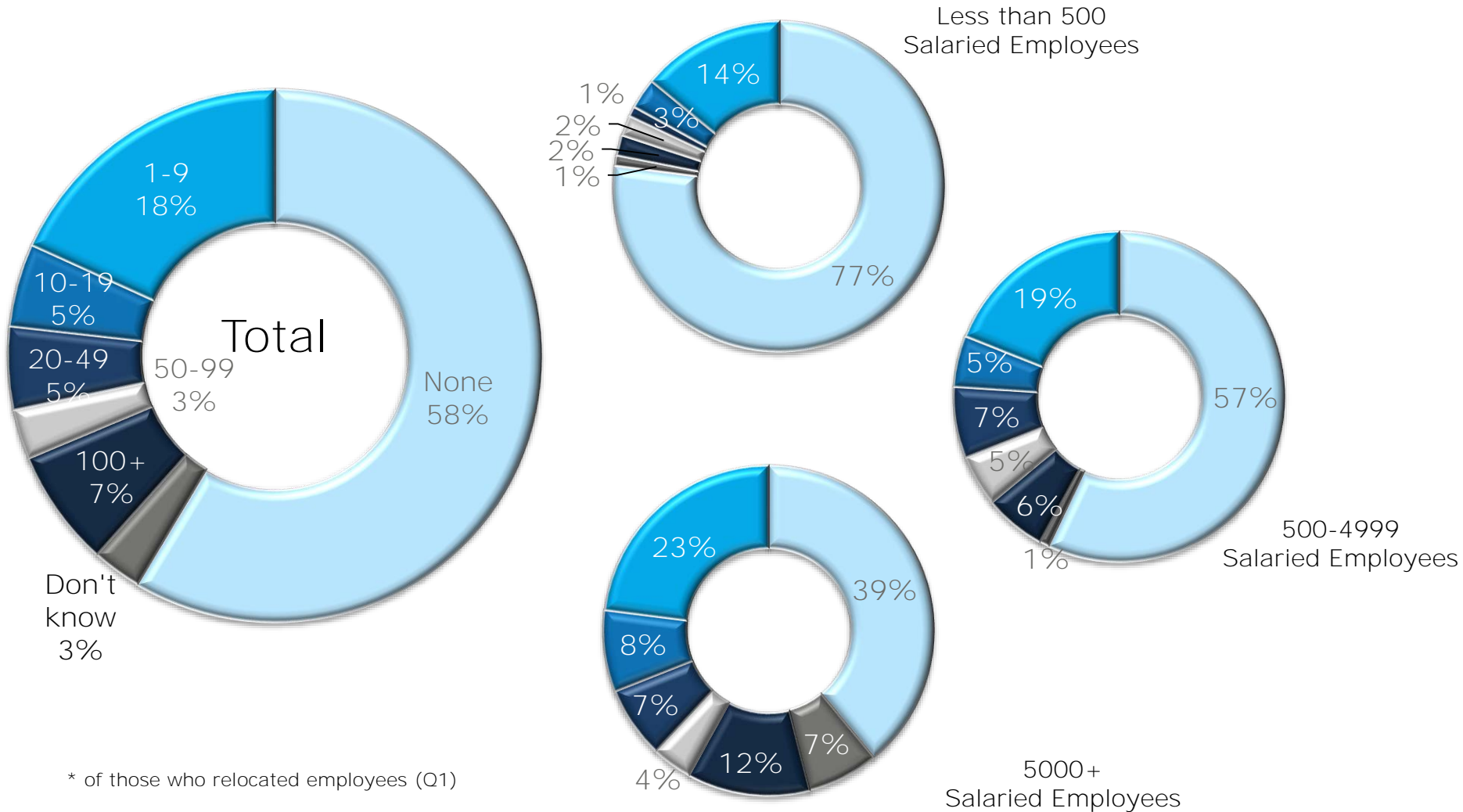
Q. 12a - Number of Employees Relocated in 2015: Within the U.S. \*



\* of those who relocated employees (Q1)

# Relocation Volumes & Budgets

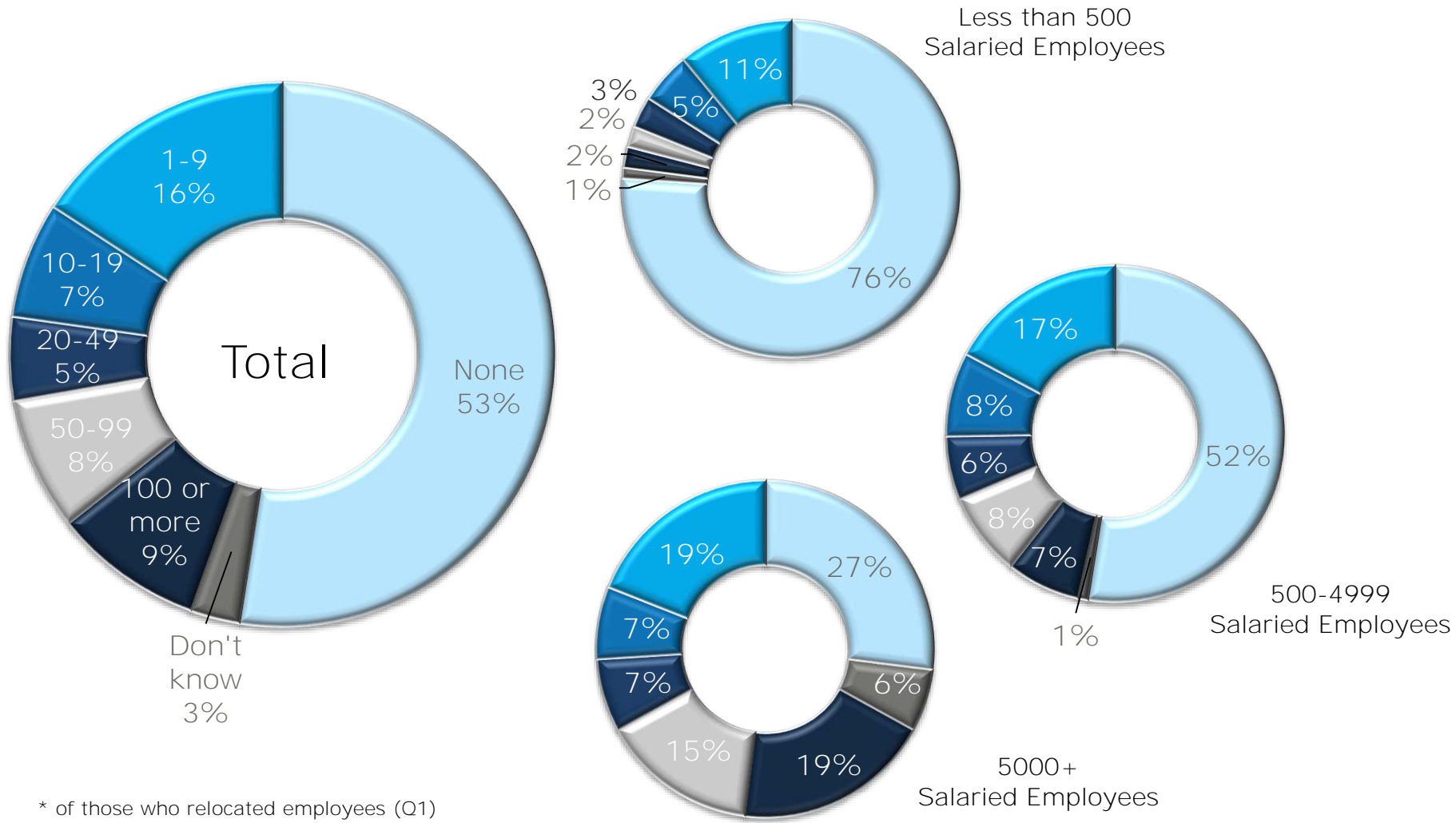
Q. 12a – Number of Employees Relocated in 2015: Between the U.S. and Canada\*



\* of those who relocated employees (Q1)

# Relocation Volumes & Budgets

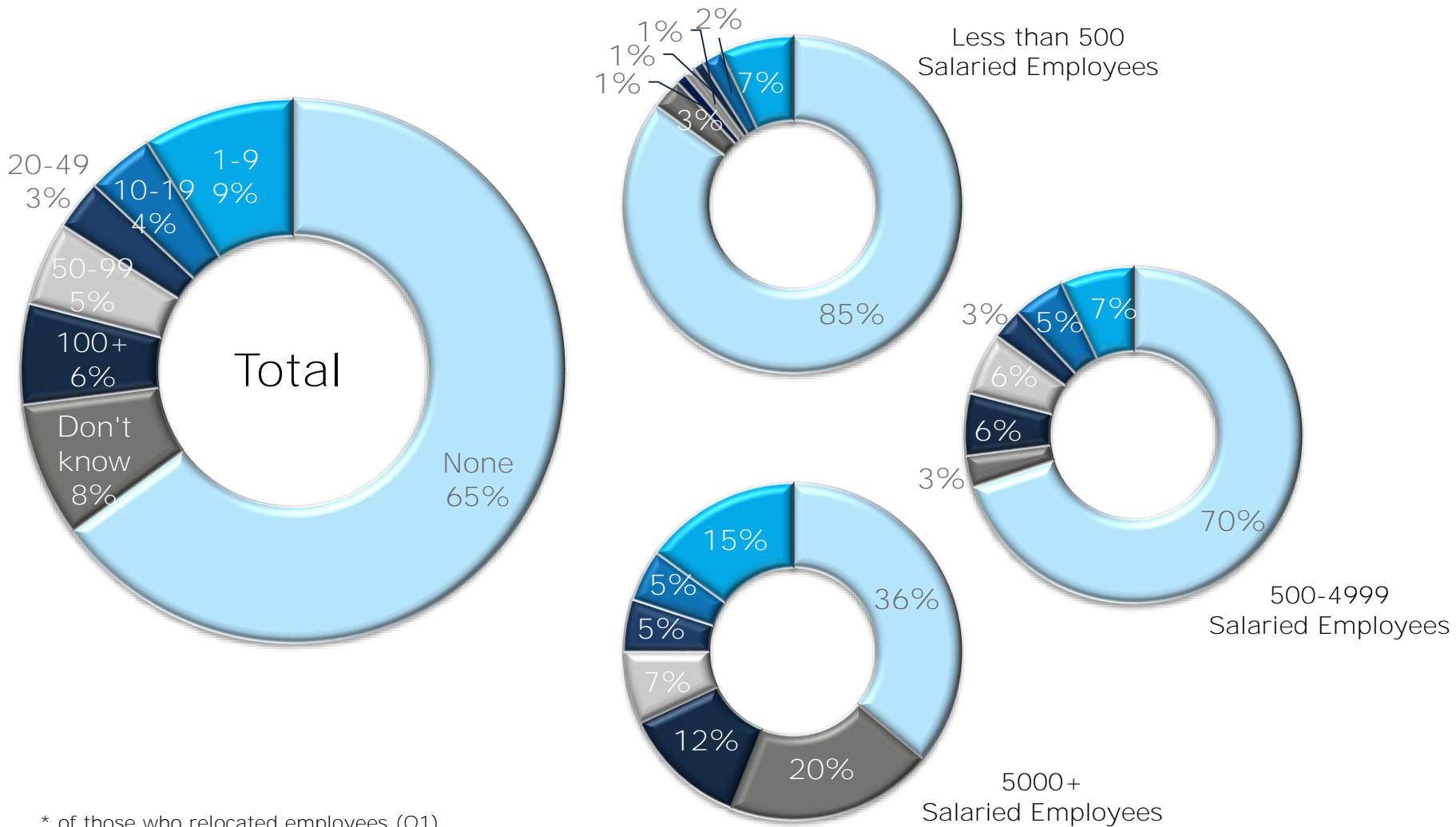
Q. 12a – Number of Employees Relocated in 2015: Between the U.S. and Another Country\*



\* of those who relocated employees (Q1)

# Relocation Volumes & Budgets

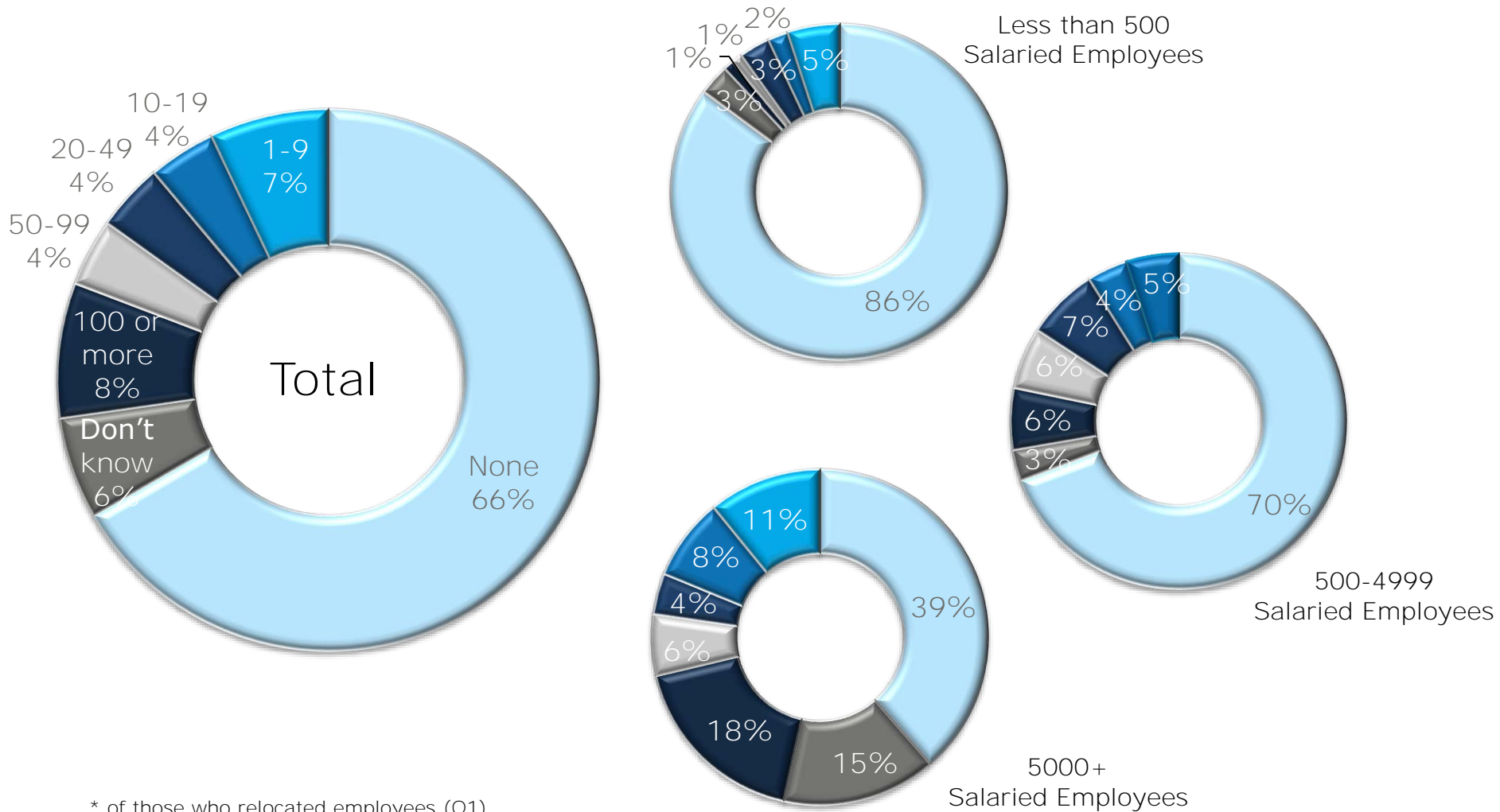
Q. 12a – Number of Employees Relocated in 2015: Within a Single Foreign Country\*



\* of those who relocated employees (Q1)

# Relocation Volumes & Budgets

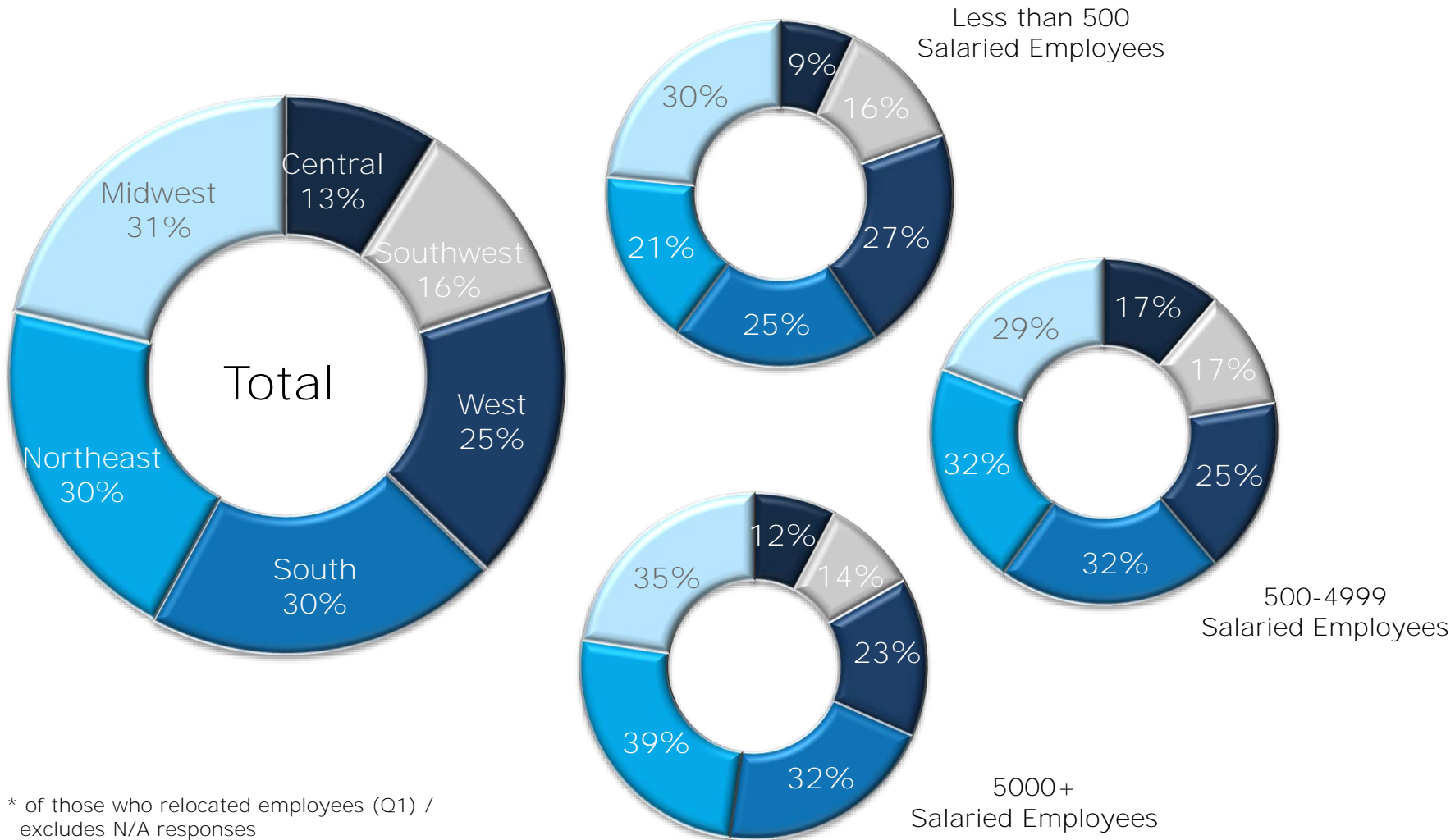
Q. 12a – Number of Employees Relocated in 2015: Between Two Foreign Countries\*



\* of those who relocated employees (Q1)

# Relocation Volumes & Budgets

Q. 12b – Most Frequent Destinations of Transfer in 2015: Within the U.S. \*

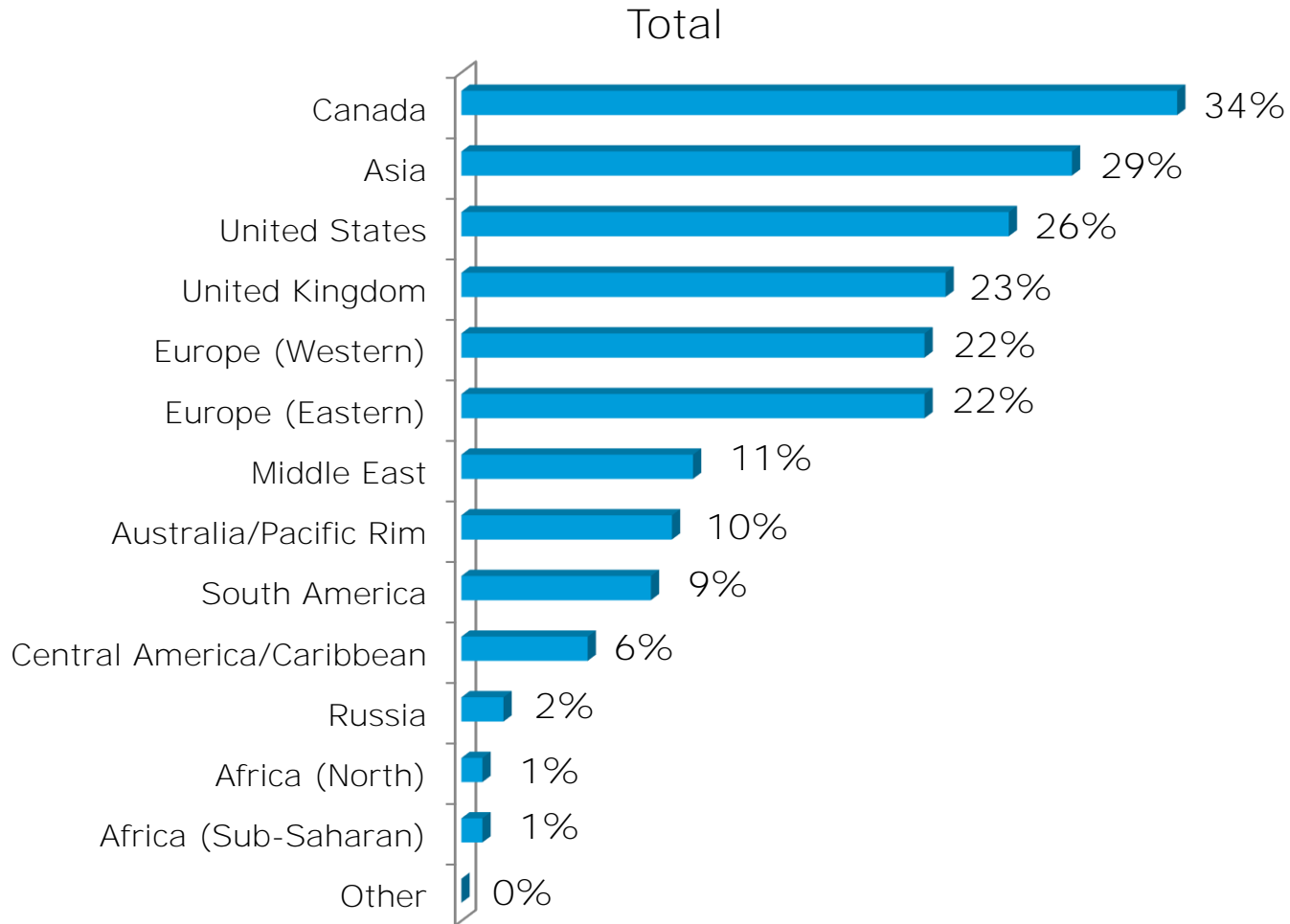


\* of those who relocated employees (Q1) / excludes N/A responses



# Relocation Volumes & Budgets

*Q. 12b – Most Frequent Destinations of Transfer in 2015:  
Between the U.S. and Another Country/Region\**



\* of those who relocated employees (Q1) / excludes N/A responses

# Relocation Volumes & Budgets

*Q. 12b – Most Frequent Destinations of Transfer in 2015:  
Between the U.S. and Another Country/Region\**

By Company Size (Salaried Employees)

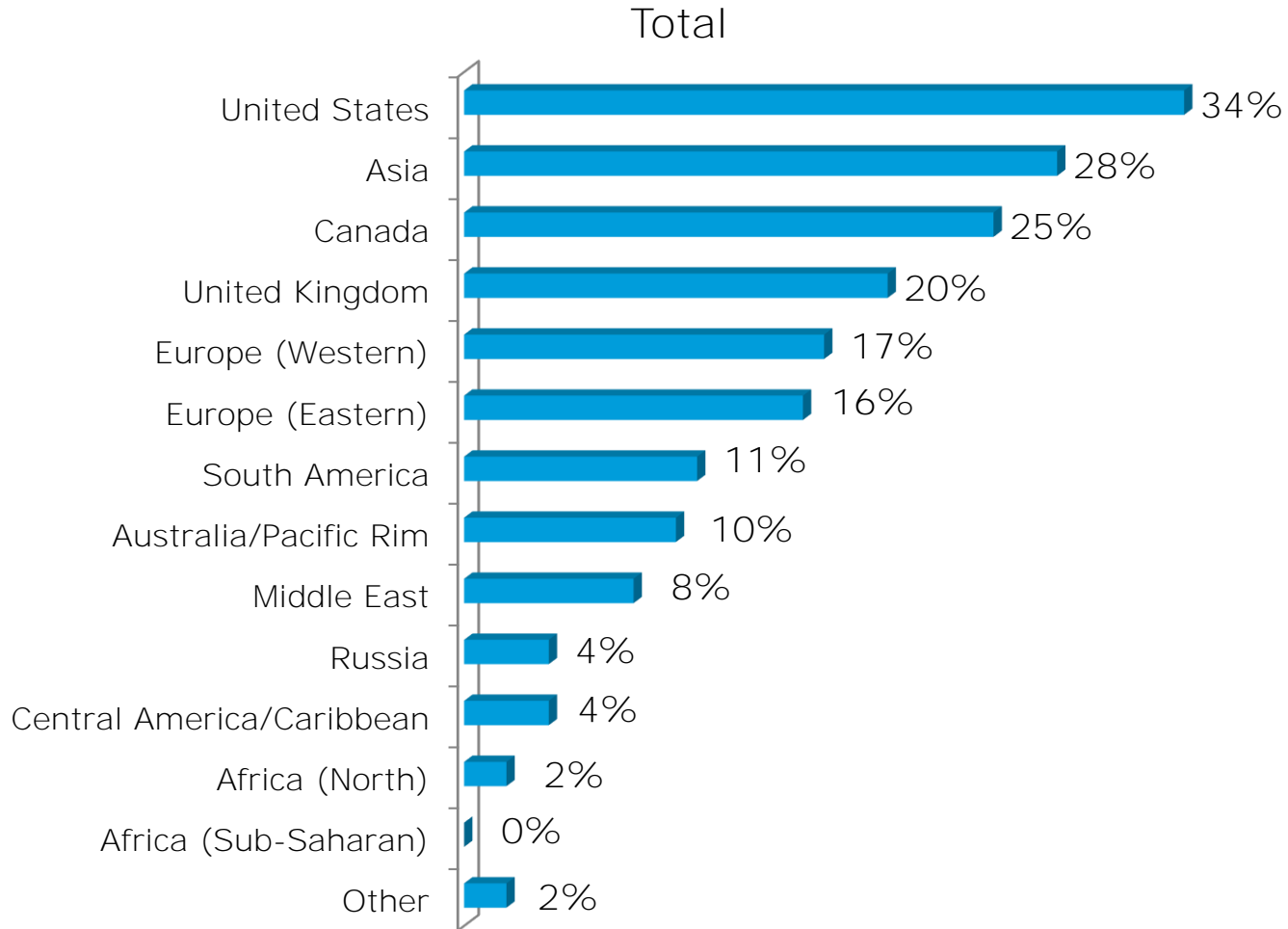
Most Frequent International Destination	Total	Less than 500	500-4999	5000+
Canada	34%	39%	40%	27%
Asia	29%	17%	28%	35%
United States	26%	30%	33%	17%
United Kingdom	23%	17%	22%	27%
Europe (Western)	22%	13%	21%	28%
Europe (Eastern)	22%	11%	26%	24%
Middle East	11%	4%	13%	14%
Australia/Pacific Rim	10%	9%	6%	13%
South America	9%	2%	17%	5%
Central America/Caribbean	6%	2%	10%	5%
Russia	2%	0%	1%	3%
Africa (North)	1%	0%	1%	2%
Africa (Sub-Saharan)	1%	0%	1%	1%
Other	0%	2%	0%	0%

\* of those who relocated employees (Q1) / excludes N/A responses



# Relocation Volumes & Budgets

Q. 12b – Most Frequent Destinations of Transfer in 2015:  
Within a Single Foreign Country/Region\*



\* of those who relocated employees (Q1) / excludes N/A responses

# Relocation Volumes & Budgets

Q. 12b – Most Frequent Destinations of Transfer in 2015:  
Within a Single Foreign Country/Region\*

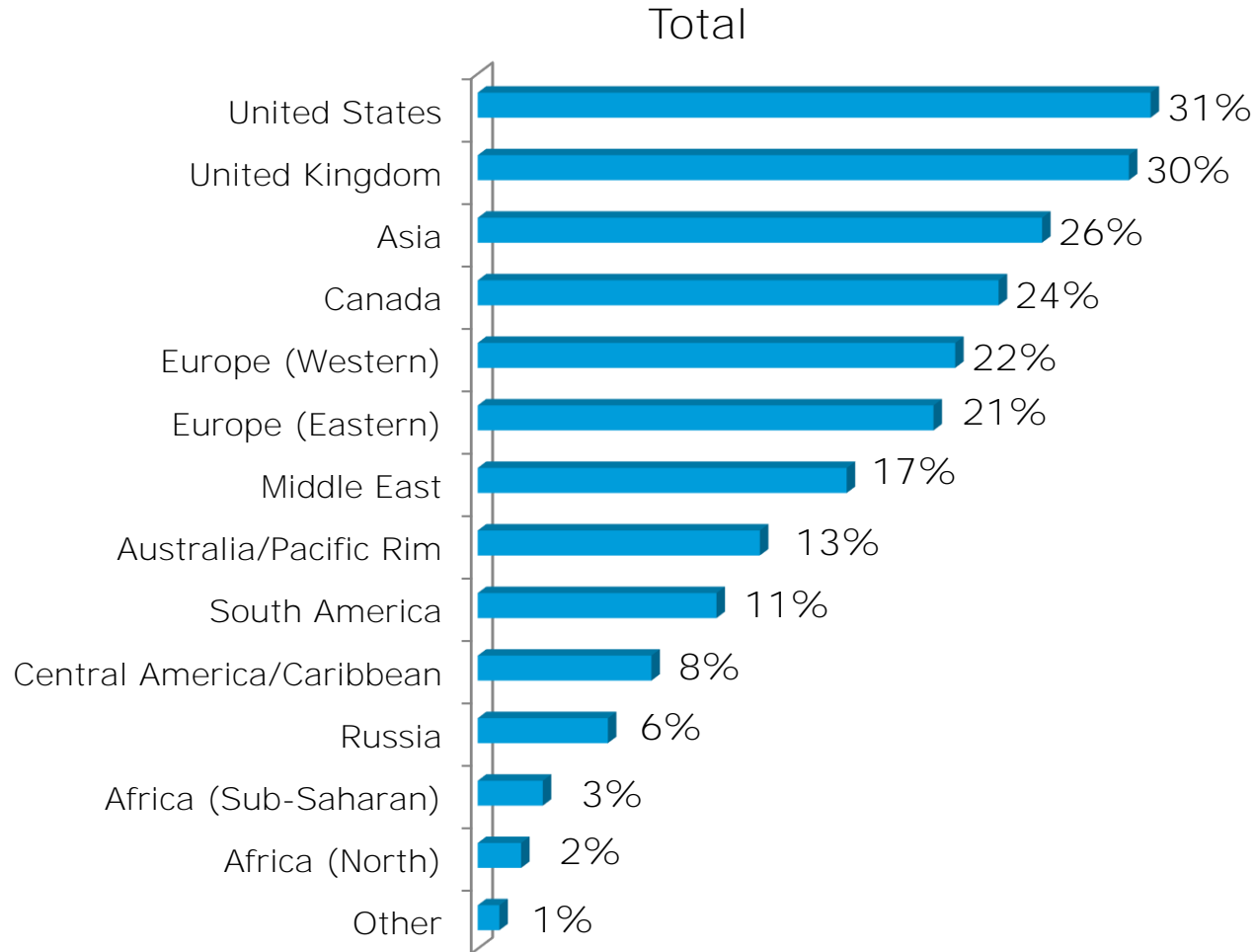
By Company Size (Salaried Employees)

Most Frequent Intra-regional Destination	Total	500-4999	5000+
United States	34%	43%	29%
Asia	28%	33%	26%
Canada	25%	29%	24%
United Kingdom	20%	21%	20%
Europe (Western)	17%	19%	14%
Europe (Eastern)	16%	19%	17%
South America	11%	14%	9%
Australia/Pacific Rim	10%	10%	13%
Middle East	8%	10%	9%
Russia	4%	10%	0%
Central America/Caribbean	4%	2%	6%
Africa (North)	2%	2%	1%
Africa (Sub-Saharan)	0%	0%	0%
Other	2%	0%	3%

\* of those who relocated employees (Q1) / excludes N/A responses / Less than 500 not reportable due to low base size of responses

# Relocation Volumes & Budgets

*Q. 12b – Most Frequent Destinations of Transfer in 2015:  
Between Two Foreign Countries/Regions\**



\* of those who relocated employees (Q1) / excludes N/A responses

# Relocation Volumes & Budgets

*Q.12b – Most Frequent Destinations of Transfer in 2015:  
Between Two Foreign Countries/Regions\**

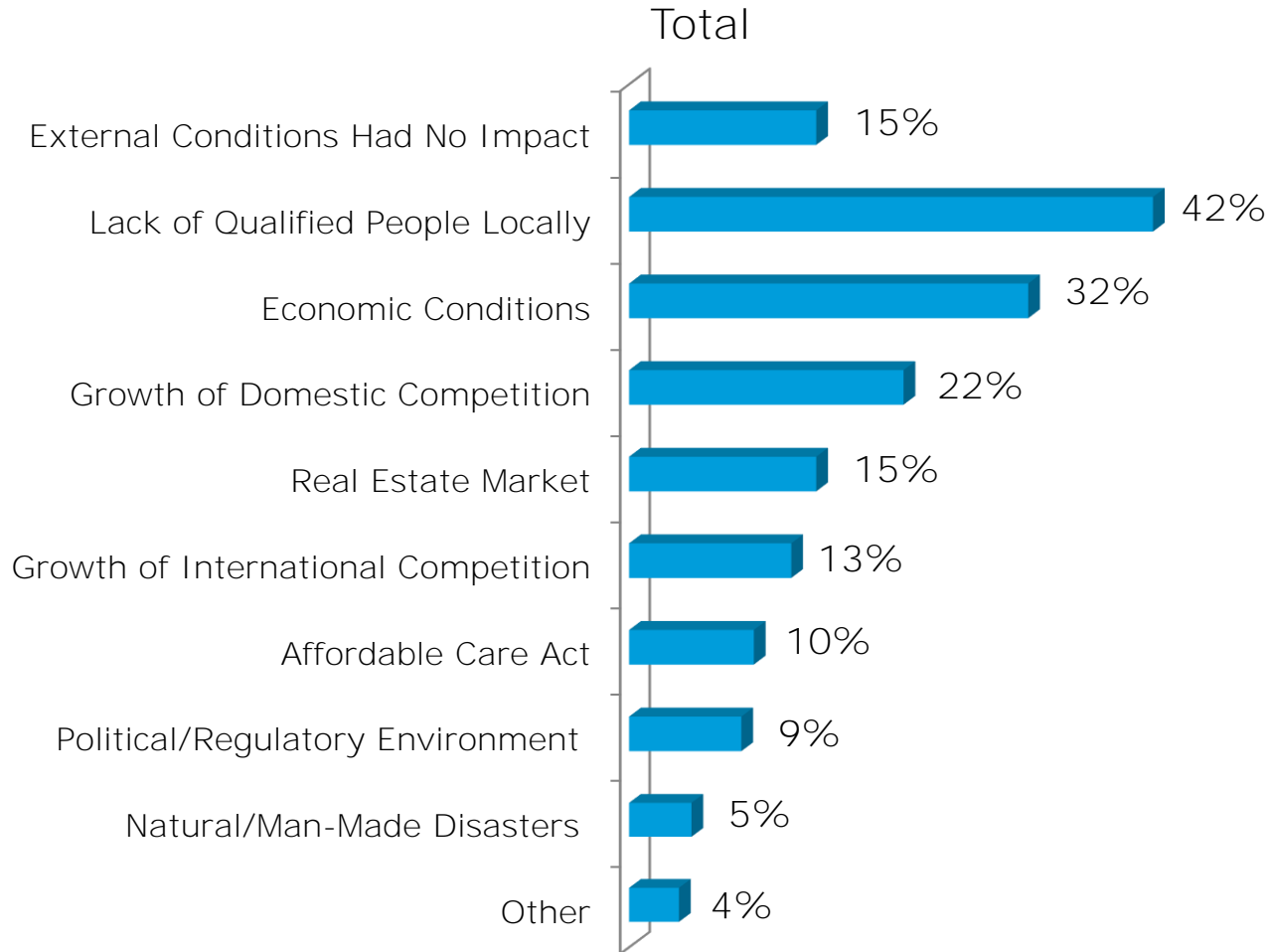
By Company Size (Salaried Employees)

Most Frequent Interregional Destination	Total	500-4999	5000+
United States	31%	37%	31%
United Kingdom	30%	23%	32%
Asia	26%	35%	20%
Canada	24%	30%	22%
Europe (Western)	22%	16%	29%
Europe (Eastern)	21%	21%	23%
Middle East	17%	21%	15%
Australia/Pacific Rim	13%	7%	18%
South America	11%	14%	9%
Central America/Caribbean	8%	5%	12%
Russia	6%	9%	5%
Africa (Sub-Saharan)	3%	7%	2%
Africa (North)	2%	0%	3%
Other	1%	0%	2%

\* of those who relocated employees (Q1) / excludes N/A responses / Less than 500 not reportable due to low base size of responses

# Factors Impacting Relocations

Q. 13 – External Factors Having the Most Significant Impact on the Number of Employee Relocations in 2015



# Factors Impacting Relocations

*Q. 13 – External Factors Having the Most Significant Impact on the Number of Employee Relocations in 2015*

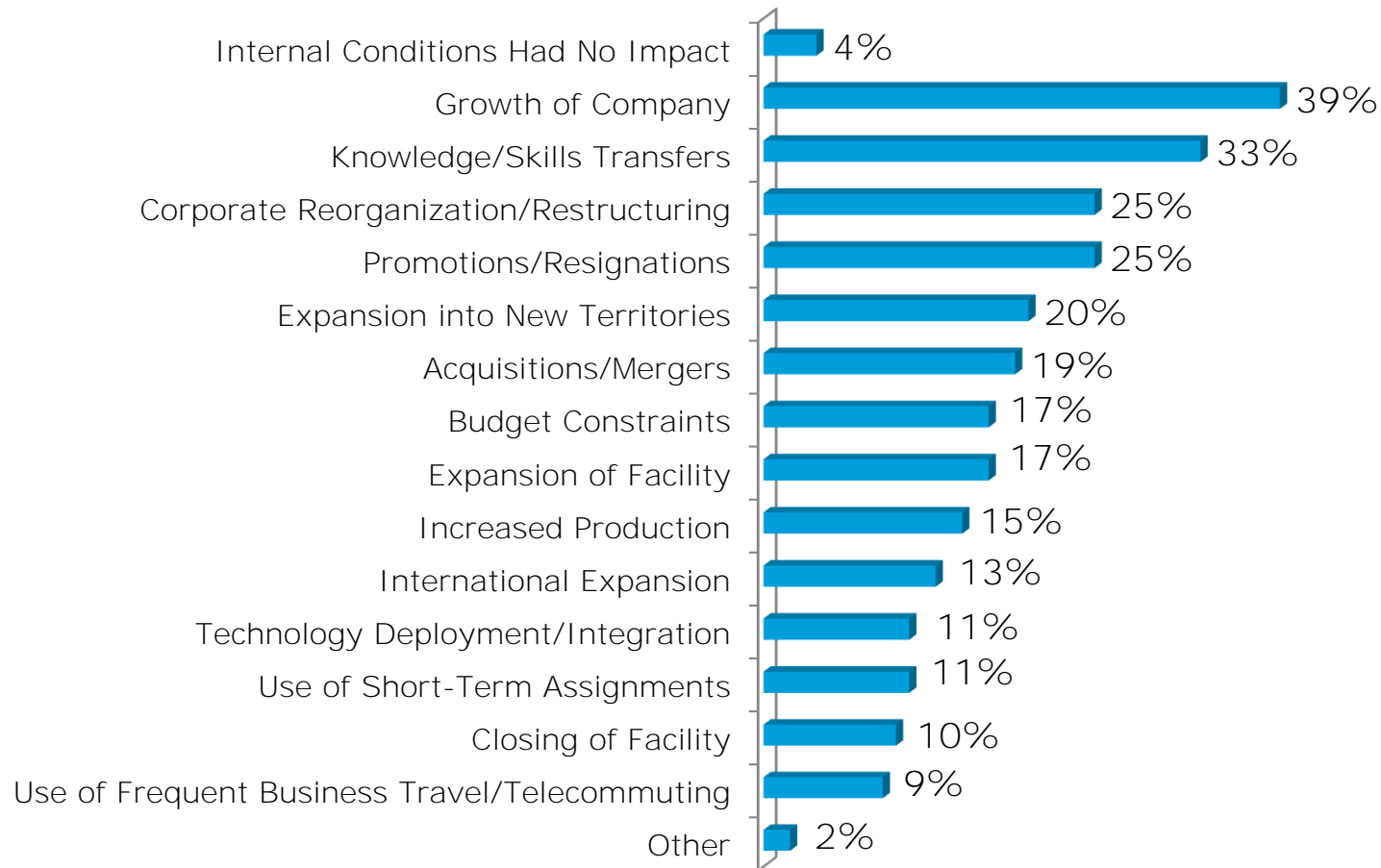
By Company Size (Salaried Employees)

External Factors Impacting Relocations	Total	Less than 500	500-4999	5000+
External Conditions Had No Impact	15%	14%	17%	15%
Lack of Qualified People Locally	42%	46%	39%	42%
Economic Conditions	32%	26%	32%	38%
Growth of Domestic Competition	22%	20%	23%	22%
Real Estate Market	15%	14%	12%	19%
Growth of International Competition	13%	10%	16%	14%
Affordable Care Act/U.S. Health Care Legislation Requirements/Implementation	10%	7%	15%	9%
Political/Regulatory Environment – Domestic or International (i.e. employment legislation/policies)	9%	8%	10%	10%
Natural/Man-Made Disasters – Domestic or International (i.e. hurricanes, earthquakes, system failures (oil/nuclear/other), etc.)	5%	6%	5%	2%
Other	4%	4%	4%	4%

# Factors Impacting Relocations

Q.14 – Internal Conditions Having the Most Significant Impact on the Number of Employee Relocations in 2015

Total



# Factors Impacting Relocations

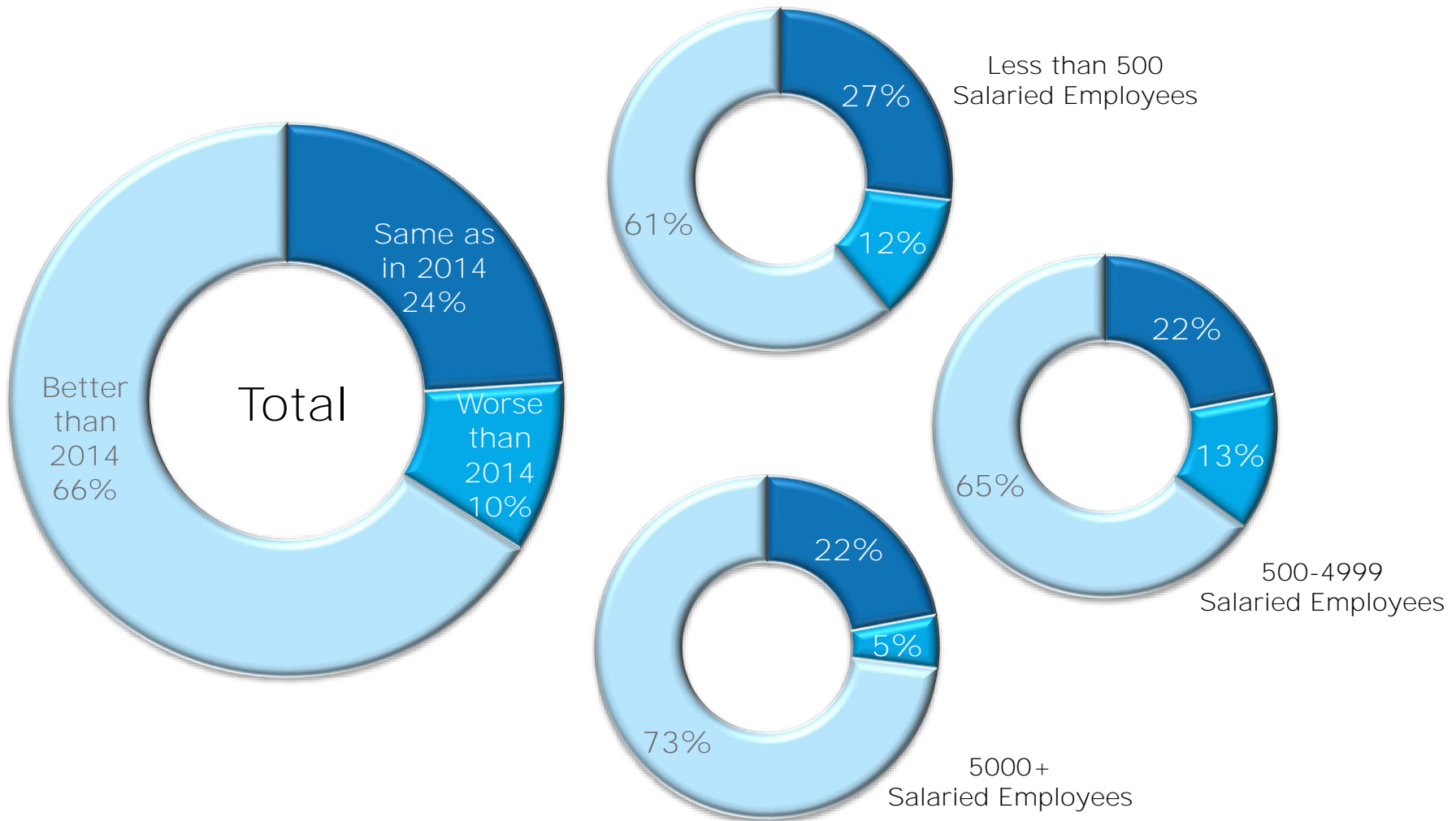
Q.14 – Internal Conditions Having the Most Significant Impact on the Number of Employee Relocations in 2015 - By Company Size (Salaried Employees)

Internal Conditions Impacting Relocations	Total	Less than 500	500-4999	5000+
Internal Conditions Had No Impact	4%	6%	3%	1%
Growth of Company	39%	34%	37%	46%
Knowledge/Skills Transfers	33%	34%	29%	36%
Corporate Reorganization/Restructuring	25%	17%	20%	41%
Promotions/Resignations	25%	25%	26%	23%
Expansion into New Territories	20%	12%	24%	24%
Acquisitions/Mergers	19%	12%	19%	28%
Budget Constraints	17%	12%	22%	18%
Expansion of Facility	17%	17%	18%	16%
Increased Production	15%	14%	21%	11%
International Expansion	13%	6%	13%	20%
Technology Deployment/Integration	11%	7%	14%	13%
Use of Short-Term Assignments	11%	10%	12%	10%
Closing of Facility	10%	7%	9%	15%
Use of Frequent Business Travel/Telecommuting	9%	5%	10%	13%
Other	2%	2%	3%	1%



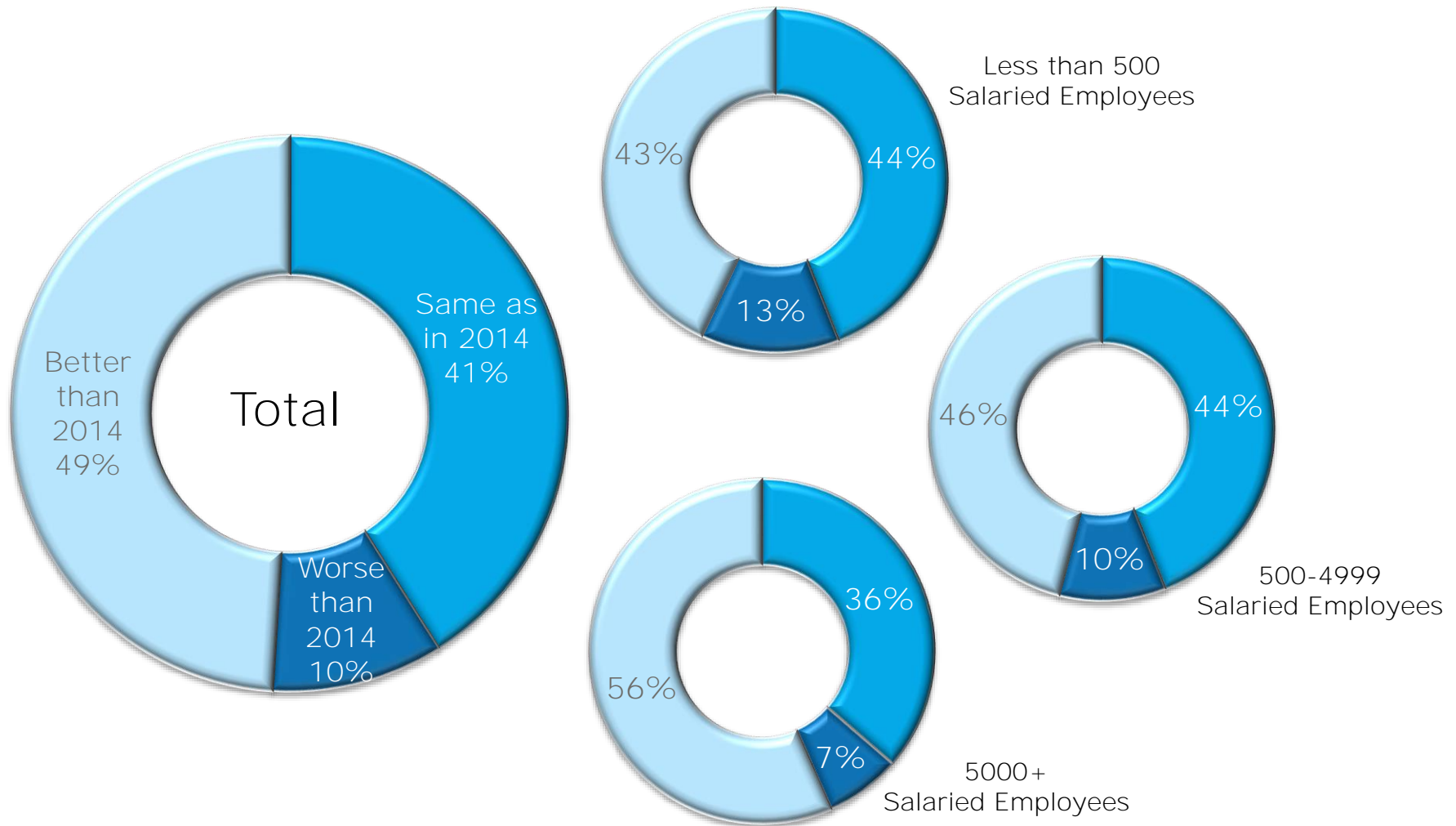
# Factors Impacting Relocations

Q. 15 – Rating of Company’s Overall Financial Performance in 2015



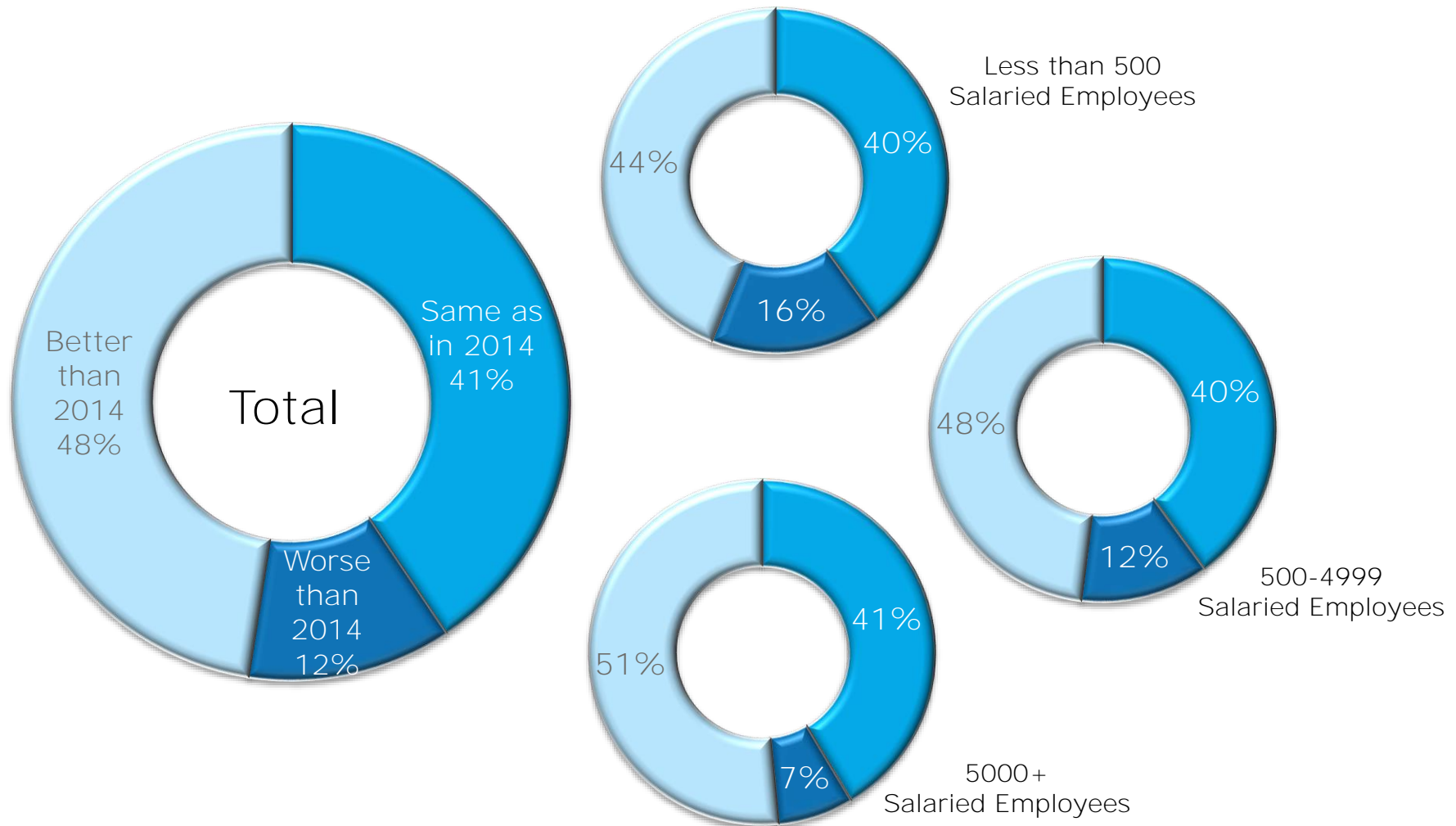
# Factors Impacting Relocations

Q.15 – Rating of Emerging Global Market Economies in 2015



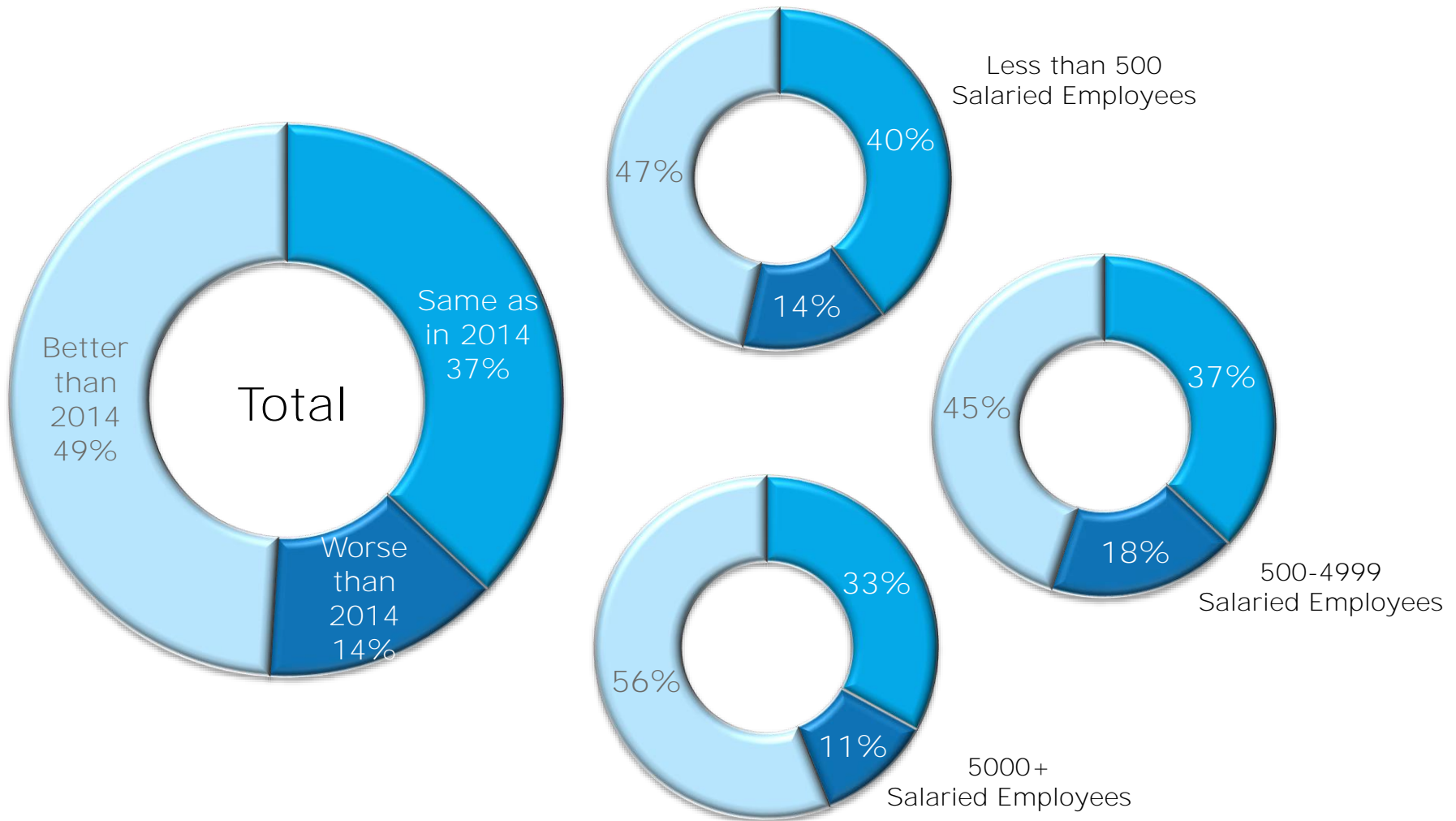
# Factors Impacting Relocations

Q. 15 – Rating of Developed Global Market Economies in 2015



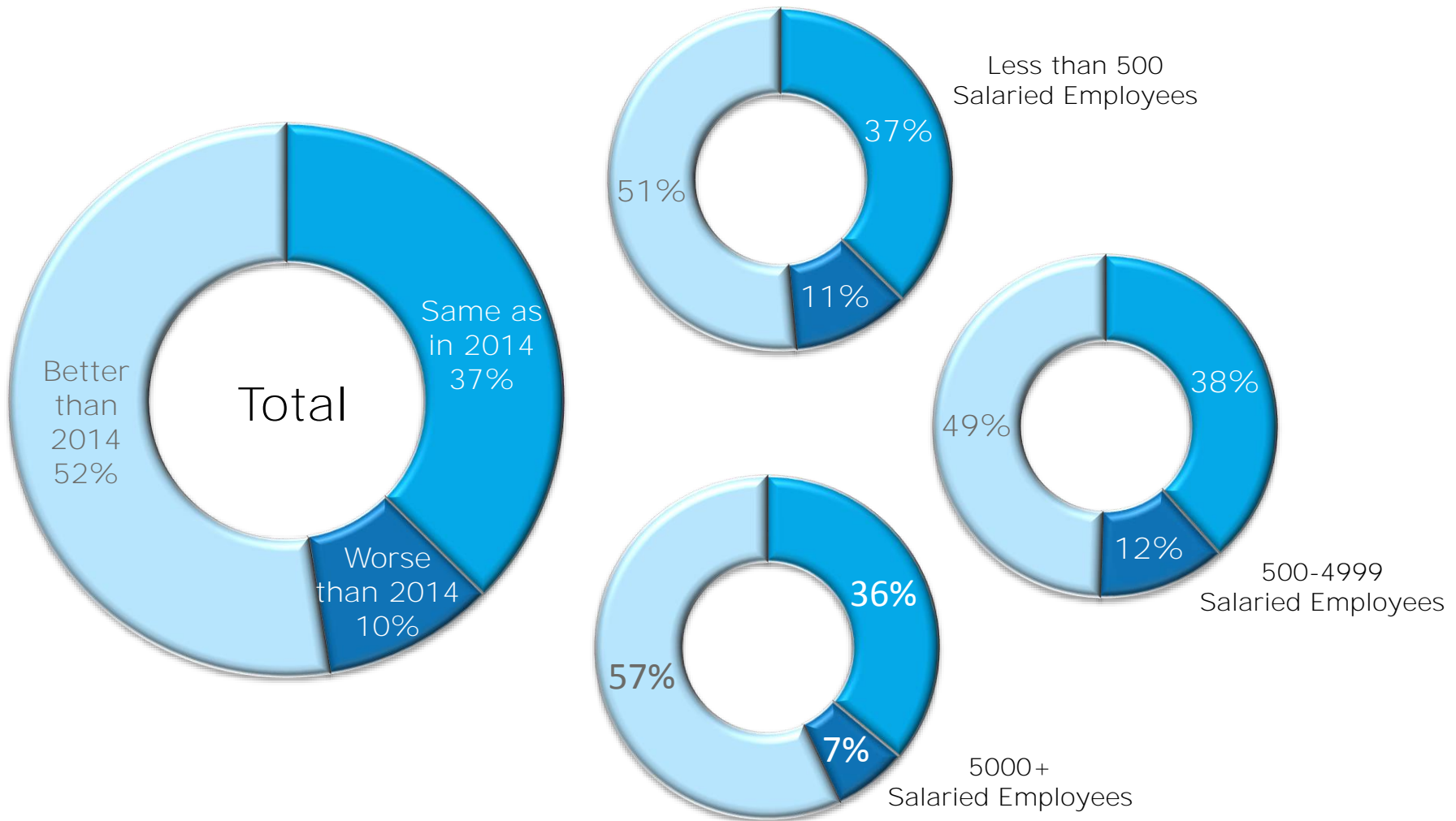
# Factors Impacting Relocations

Q. 15 – Rating of U.S. Economy in 2015



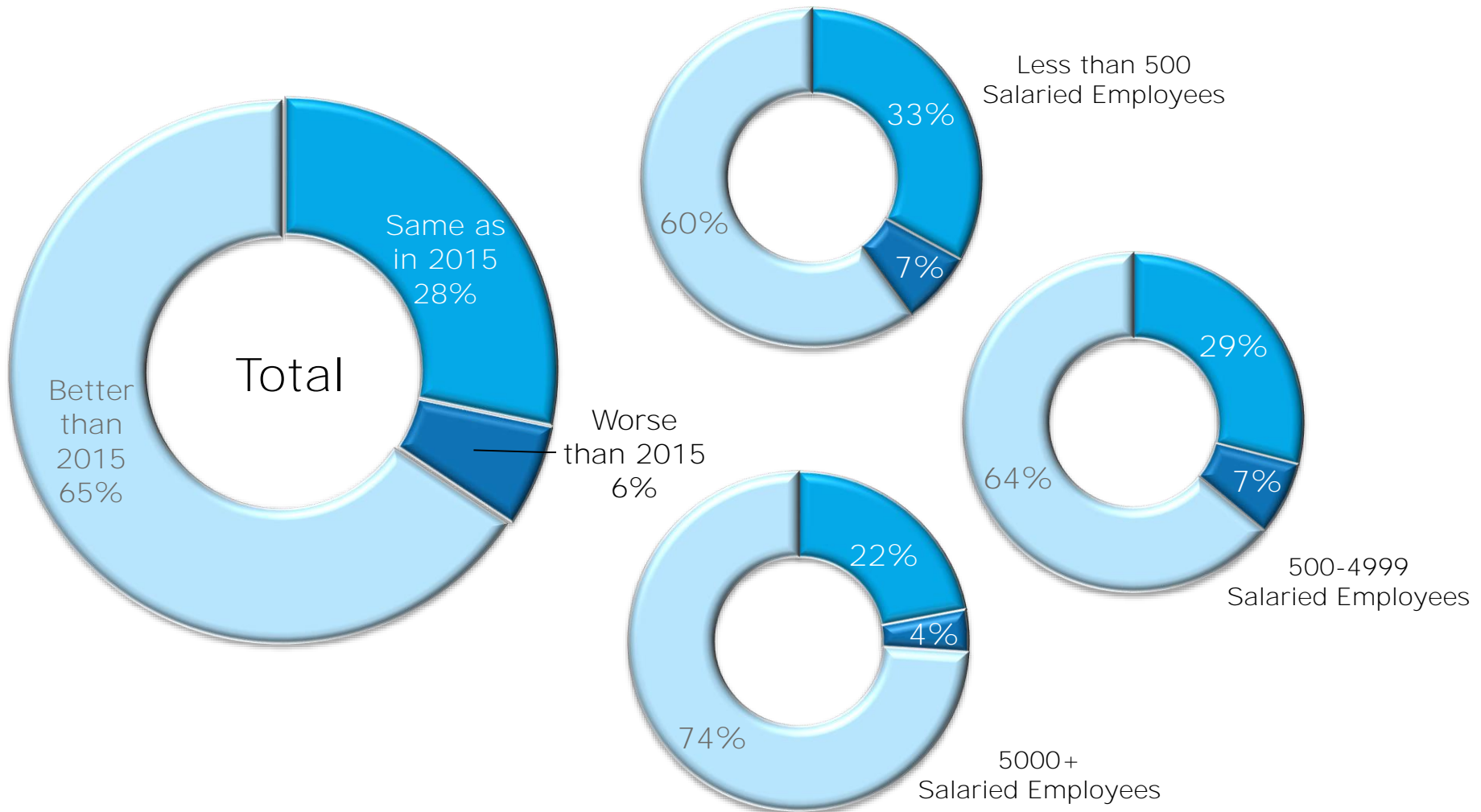
# Factors Impacting Relocations

Q. 15 – Rating of U.S. Real Estate Market in 2015



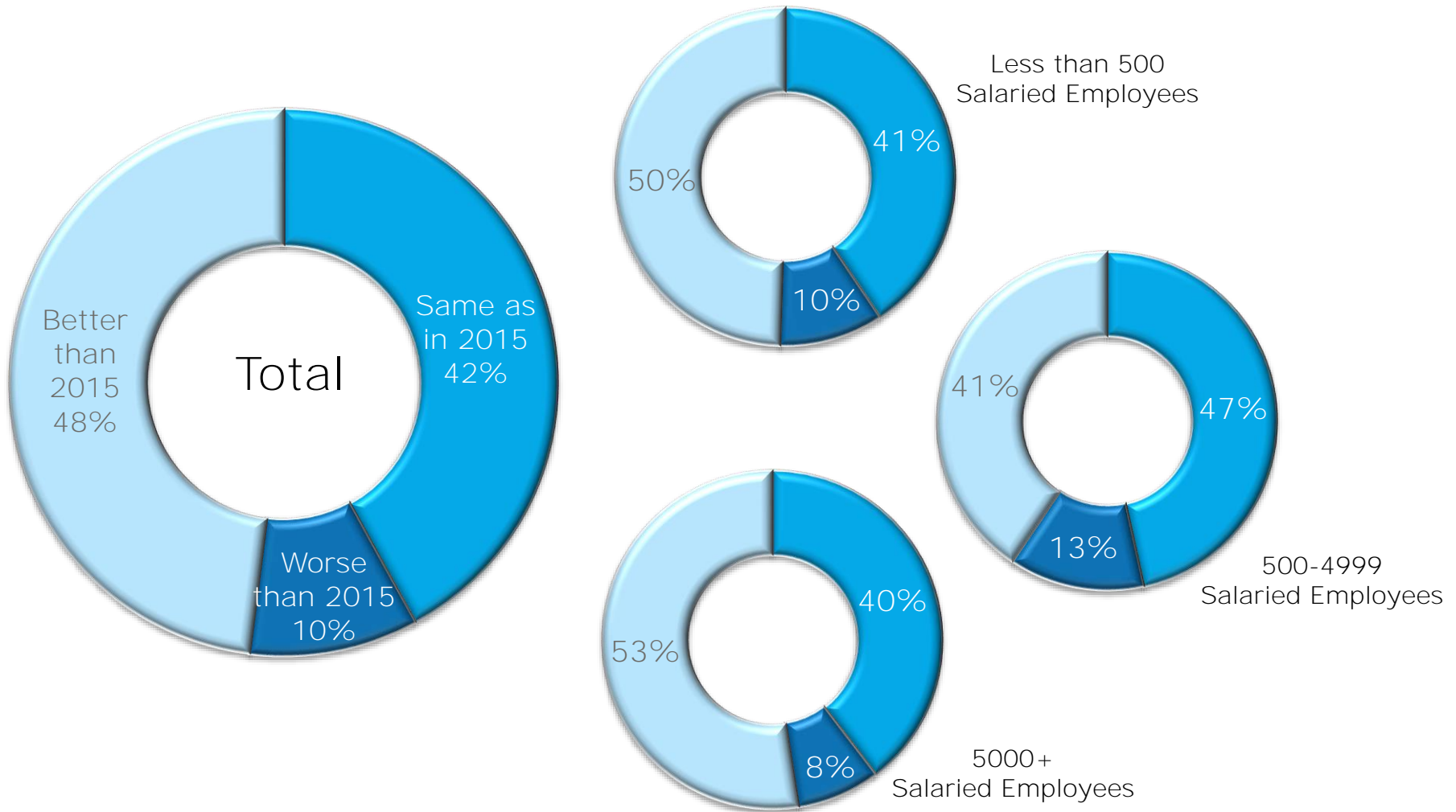
# Factors Impacting Relocations

Q. 16 – Anticipated Overall Financial Performance of Company in 2016



# Factors Impacting Relocations

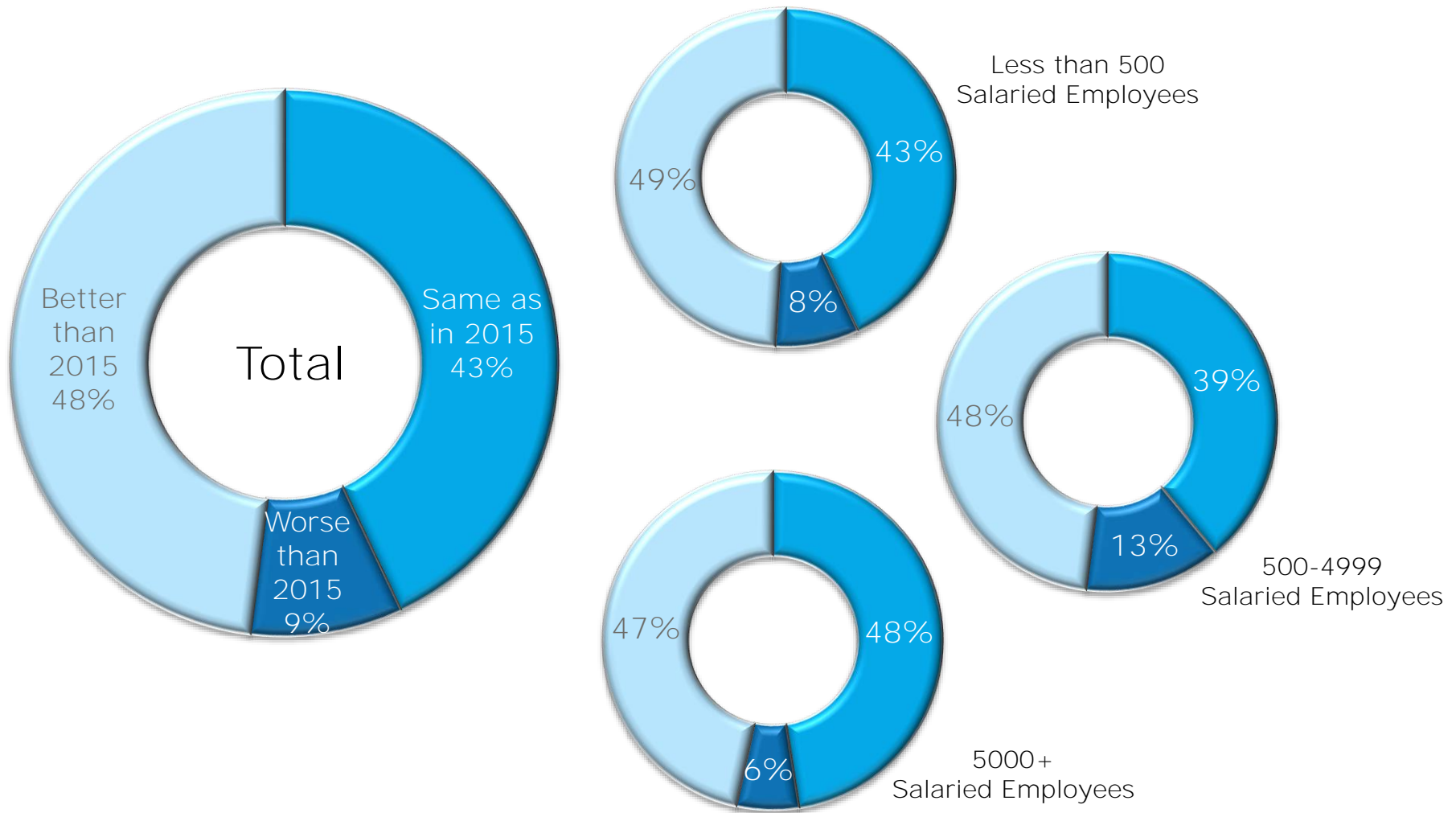
Q. 16 – Anticipated Emerging Global Market Economies in 2016





# Factors Impacting Relocations

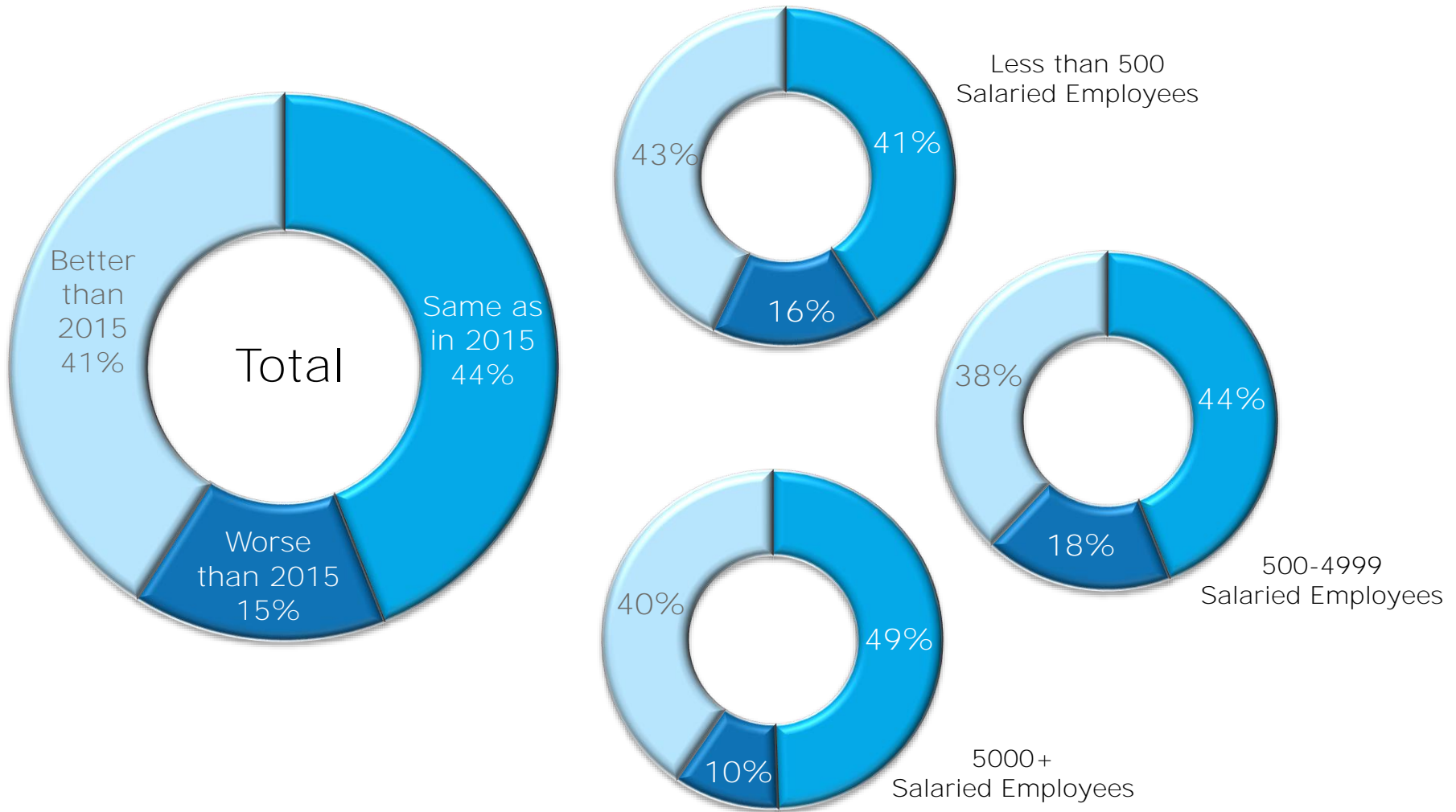
Q. 16 – Anticipated Developed Global Market Economies in 2016





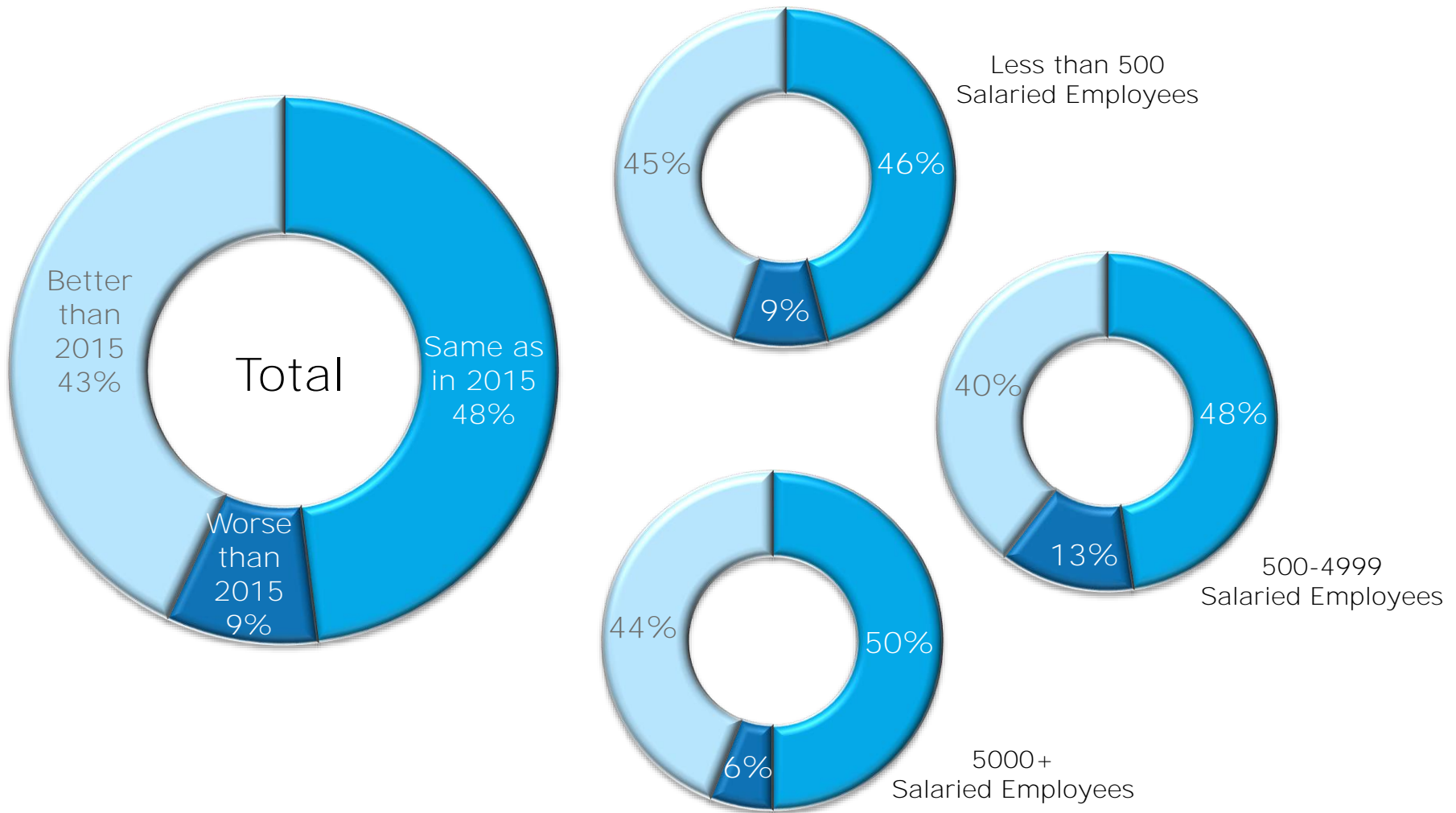
# Factors Impacting Relocations

Q. 16 – Anticipated U.S. Economy in 2016



# Factors Impacting Relocations

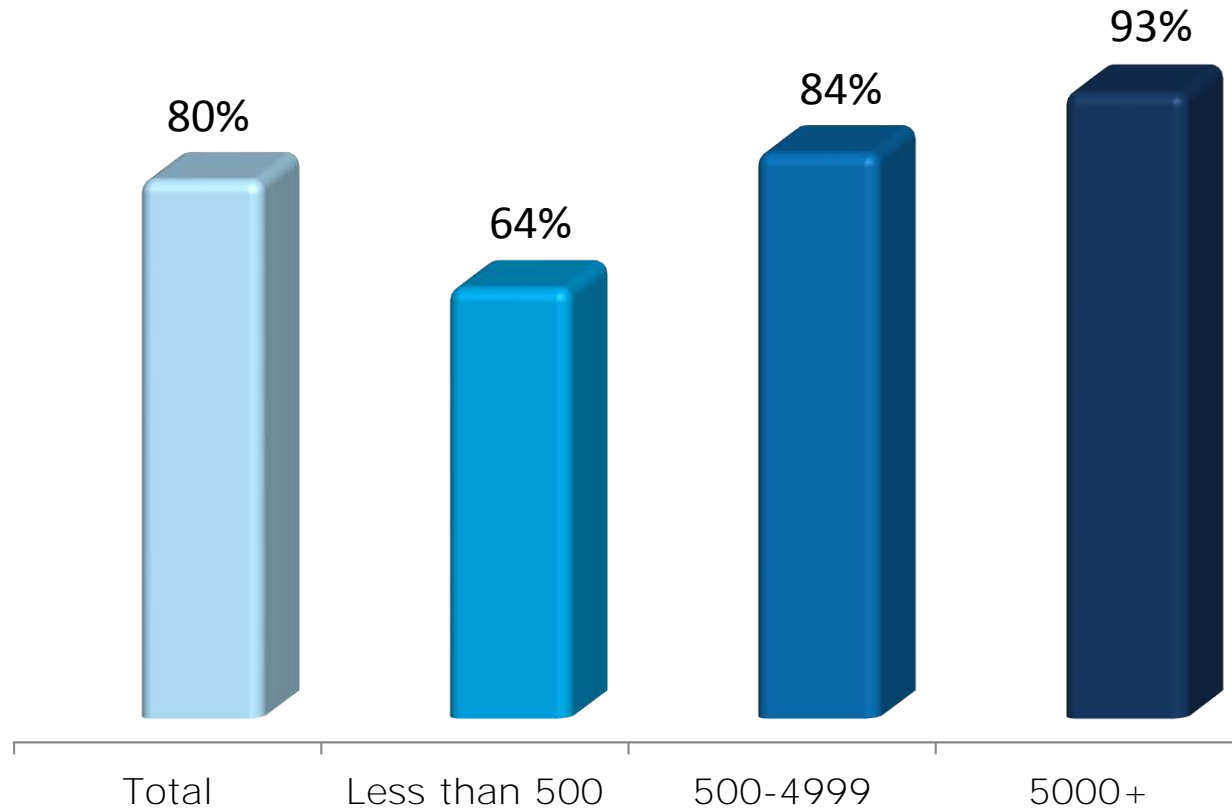
Q. 16 – Anticipated U.S. Real Estate Market in 2016



# Policy Administration

Q.17 – Companies with a Formal Policy for: Domestic Relocations\*

By Company Size (Salaried Employees)

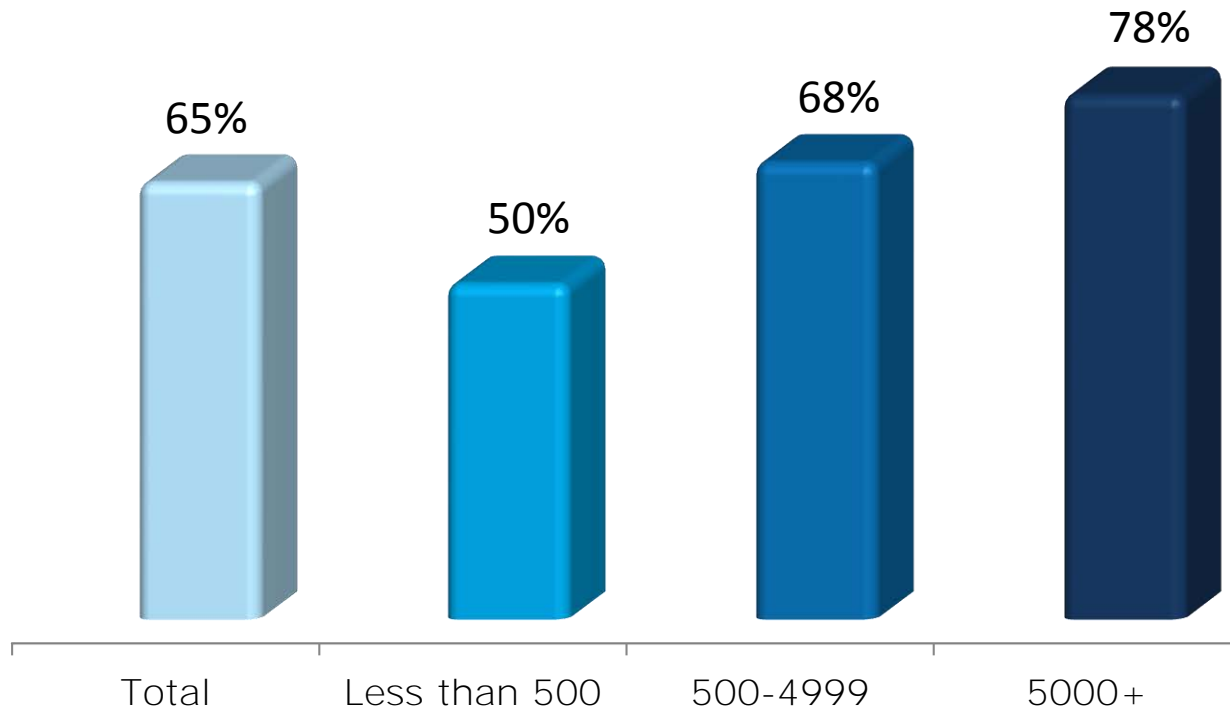


\* % of companies answering "Yes"

# Policy Administration

Q.17 – Companies with a Formal Policy for: Short-Term/Temporary Assignments\*

By Company Size (Salaried Employees)

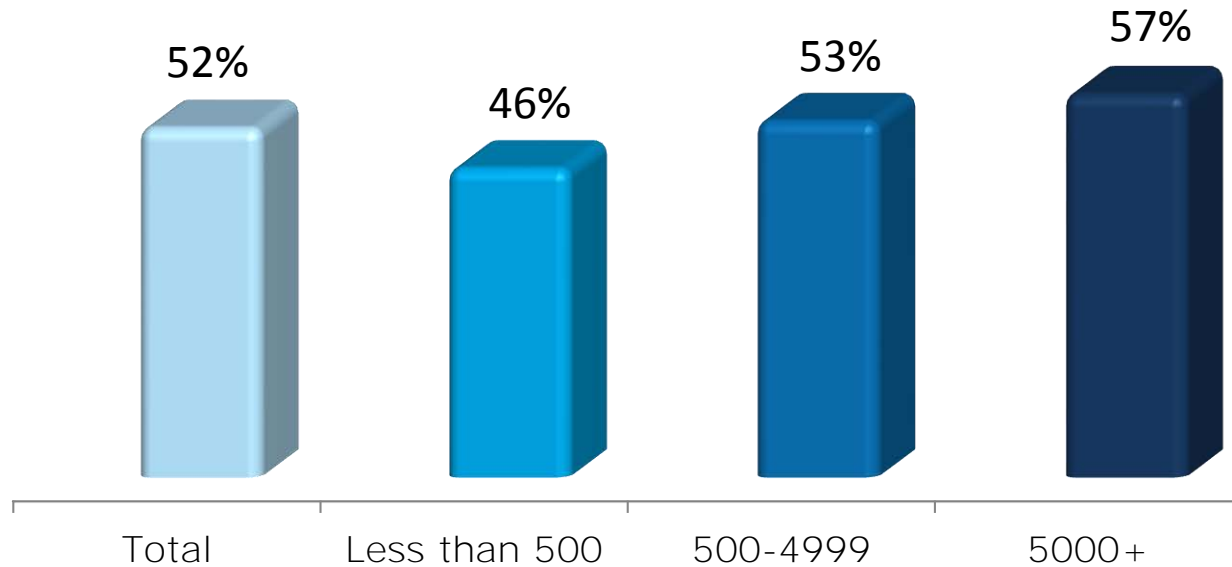


\* % of companies answering "Yes"

# Policy Administration

Q.17 – Companies with a Formal Policy for: Extended Business Travel\*

By Company Size (Salaried Employees)

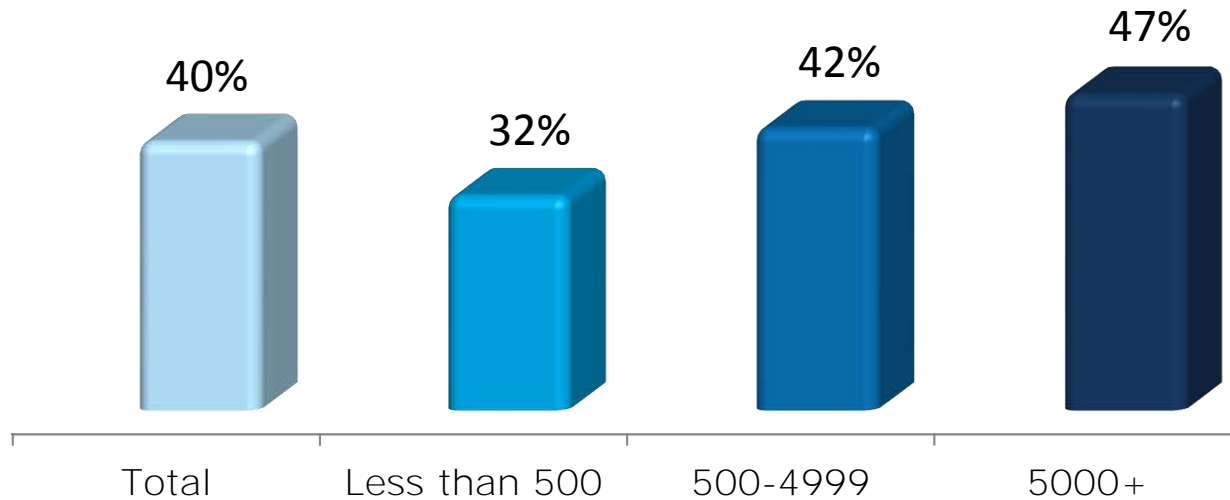


\* % of companies answering "Yes"

# Policy Administration

Q.17 – Companies with a Formal Policy for: Long-Distance Commuter\*

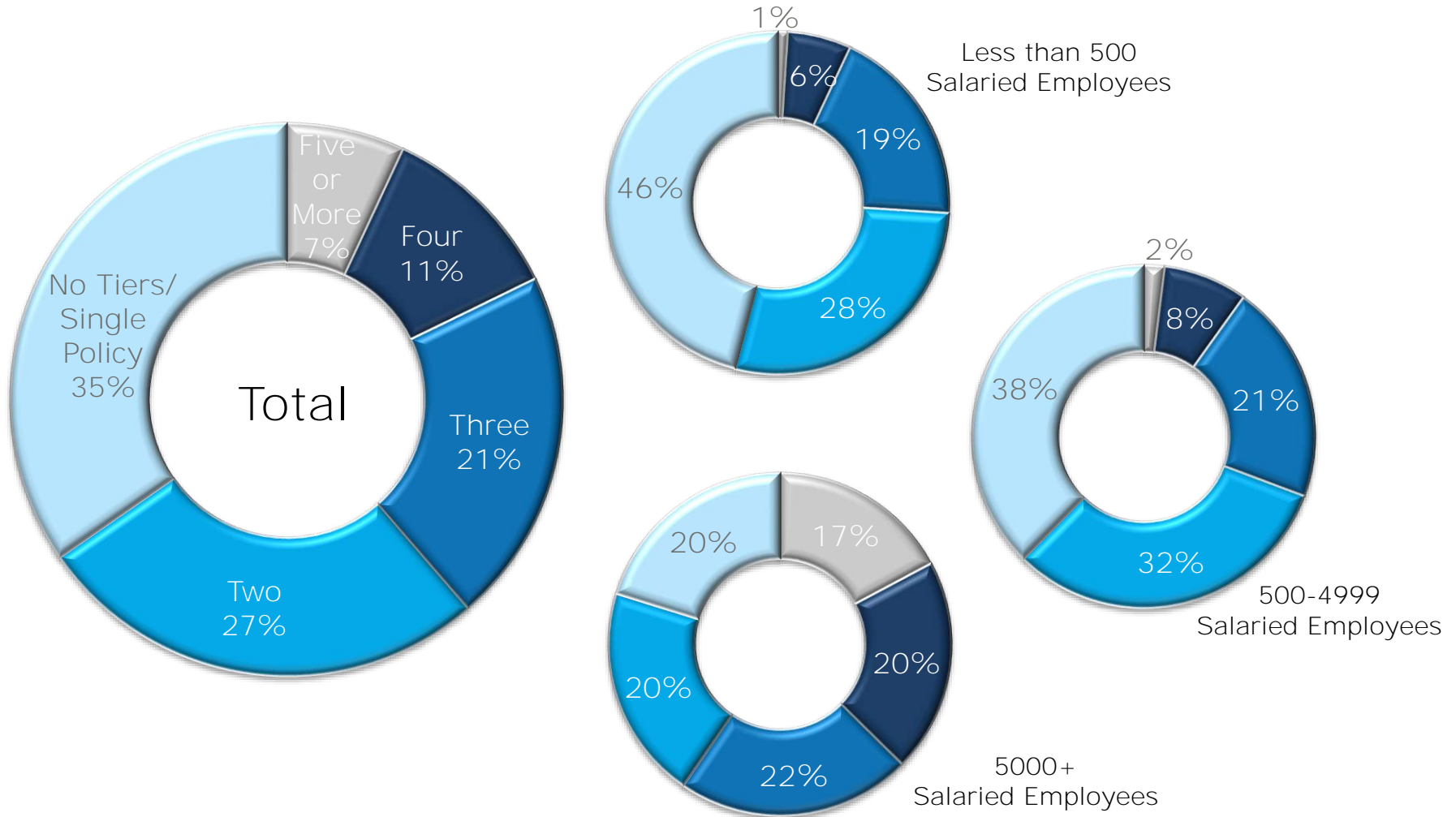
By Company Size (Salaried Employees)



\* % of companies answering "Yes"

# Policy Administration

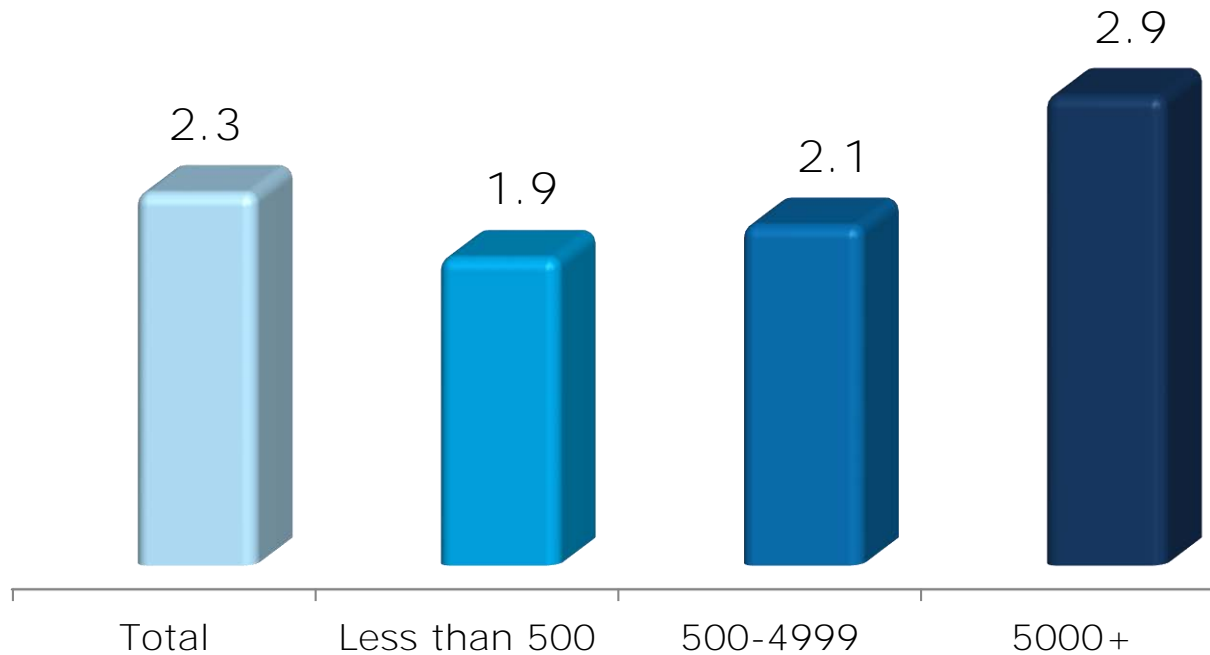
Q. 18a-1 – Does Your Company Have Different Tiers (or Levels) Within Its Domestic Relocation Policy?



# Policy Administration

Q.18a-1 – Average Number of Tiers (or Levels) Within Domestic Relocation Policy\*

By Company Size (Salaried Employees)

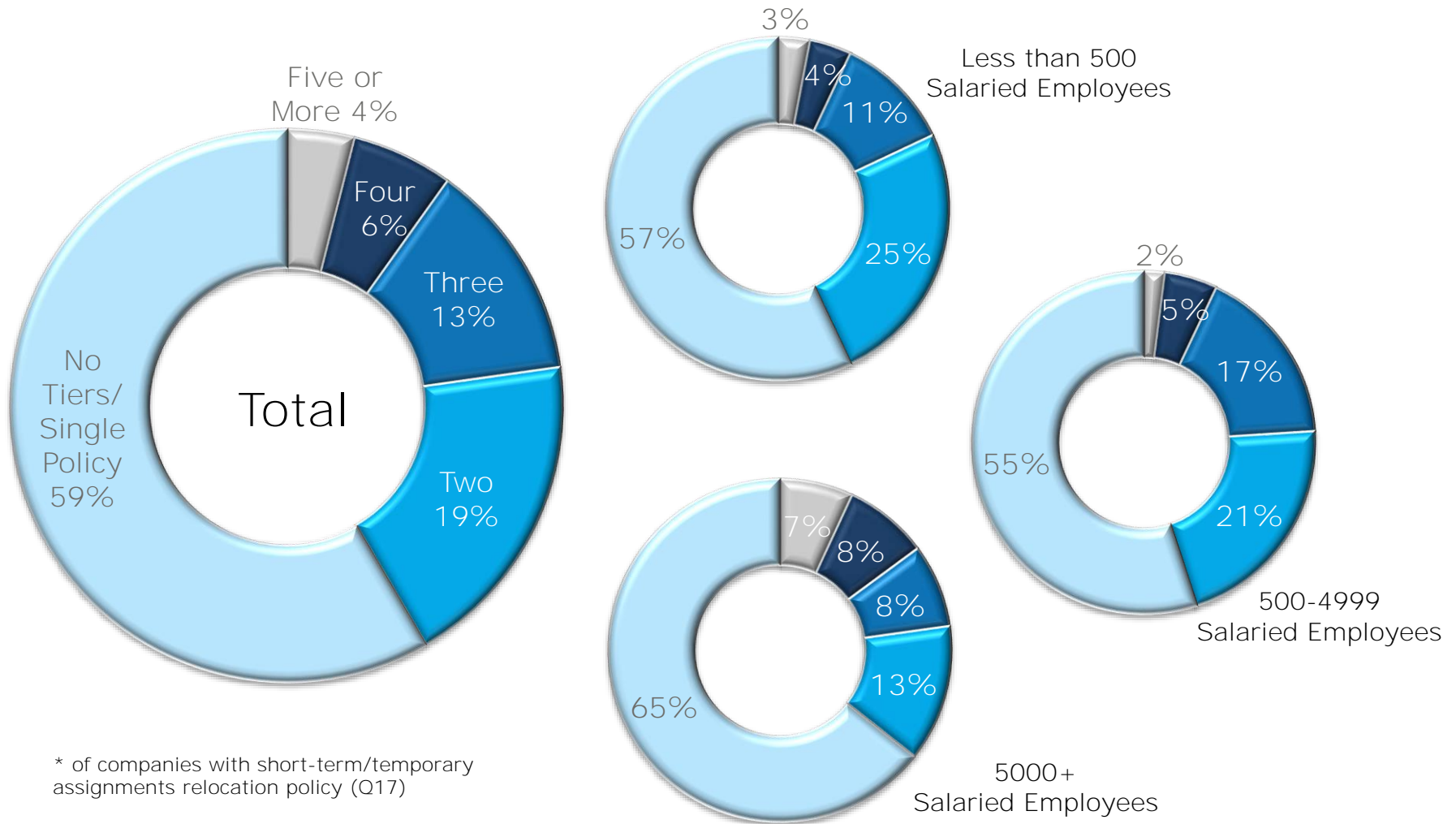


\* of companies with domestic tiers/levels (Q18a-1)



# Policy Administration

Q. 18a-2 – Does Your Company Have Different Tiers (or Levels) Within Its Short-Term/Temporary Assignments Relocation Policy?\*

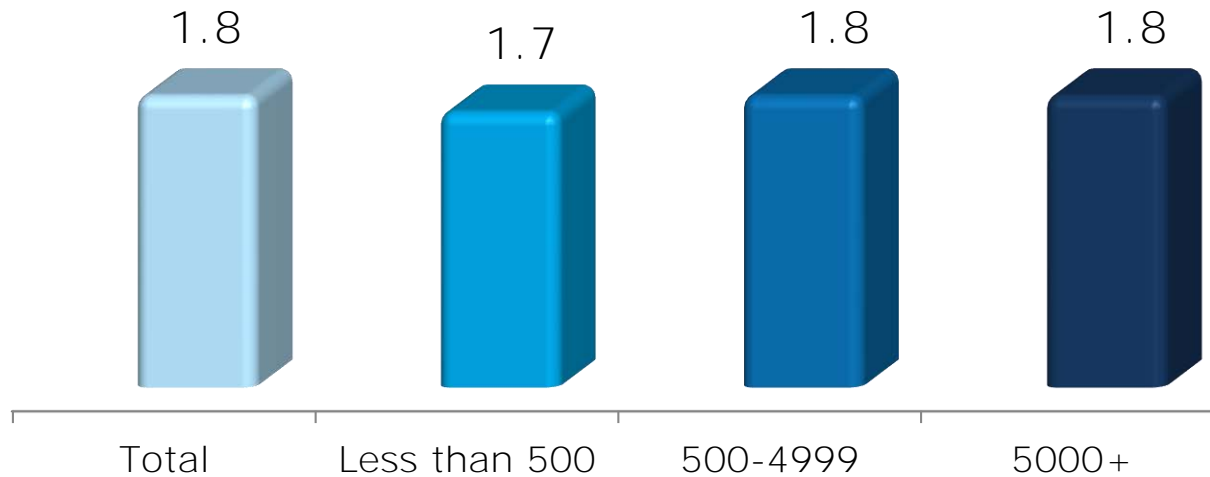


\* of companies with short-term/temporary assignments relocation policy (Q17)

# Policy Administration

*Q.18a-2 – Average Number of Tiers (or Levels) Within Short-Term/Temporary Assignments Relocation Policy\**

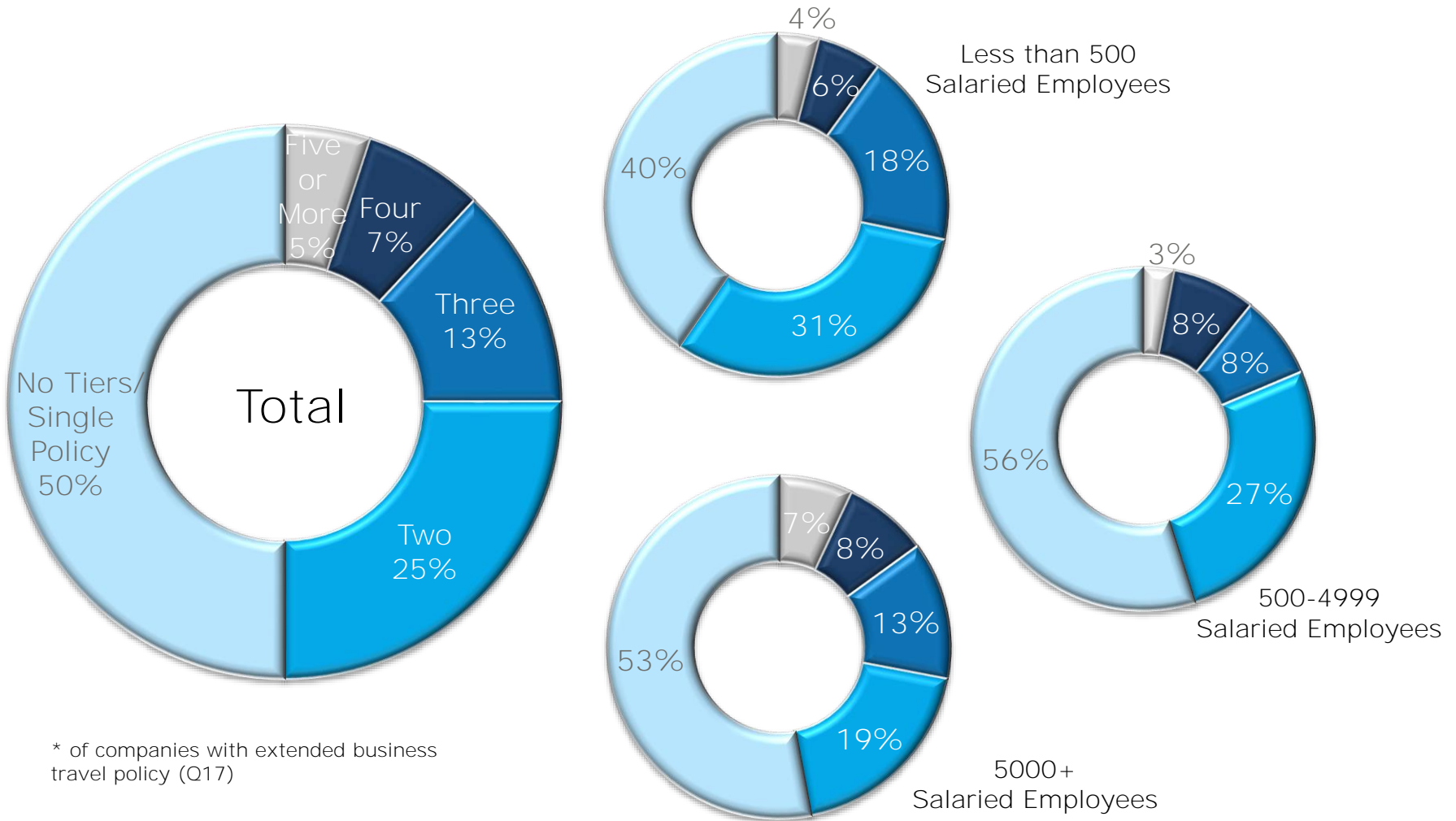
By Company Size (Salaried Employees)



\* of companies with short-term/temporary assignments relocation policy tiers/levels (Q18a-2)

# Policy Administration

Q. 18a-3 – Does Your Company Have Different Tiers (or Levels) Within Its Extended Business Travel Policy?\*

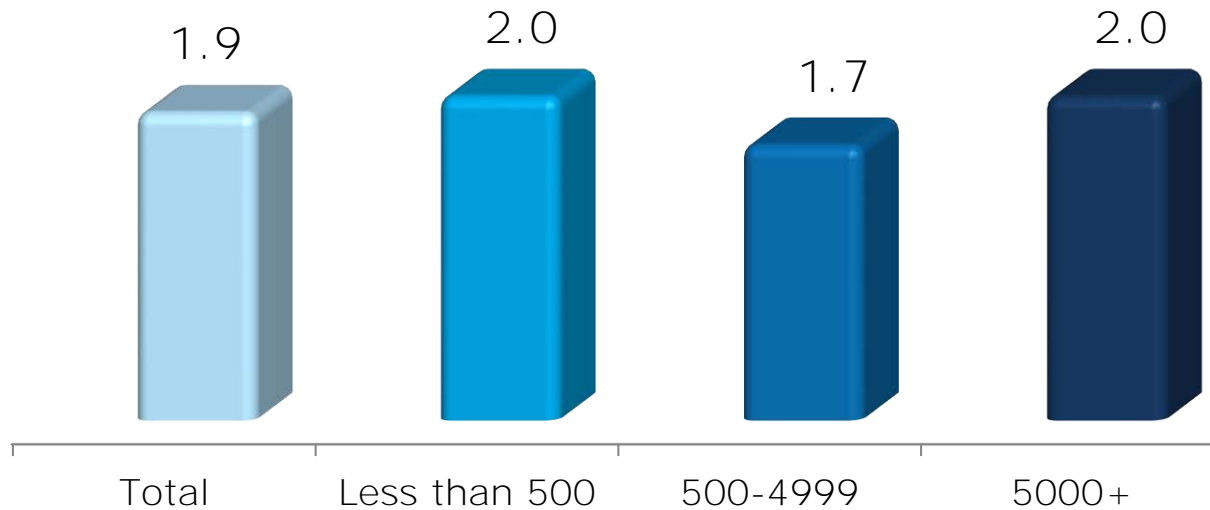


\* of companies with extended business travel policy (Q17)

# Policy Administration

Q. 18a-3 – Average Number of Tiers (or Levels) Within Extended Business Travel Policy\*

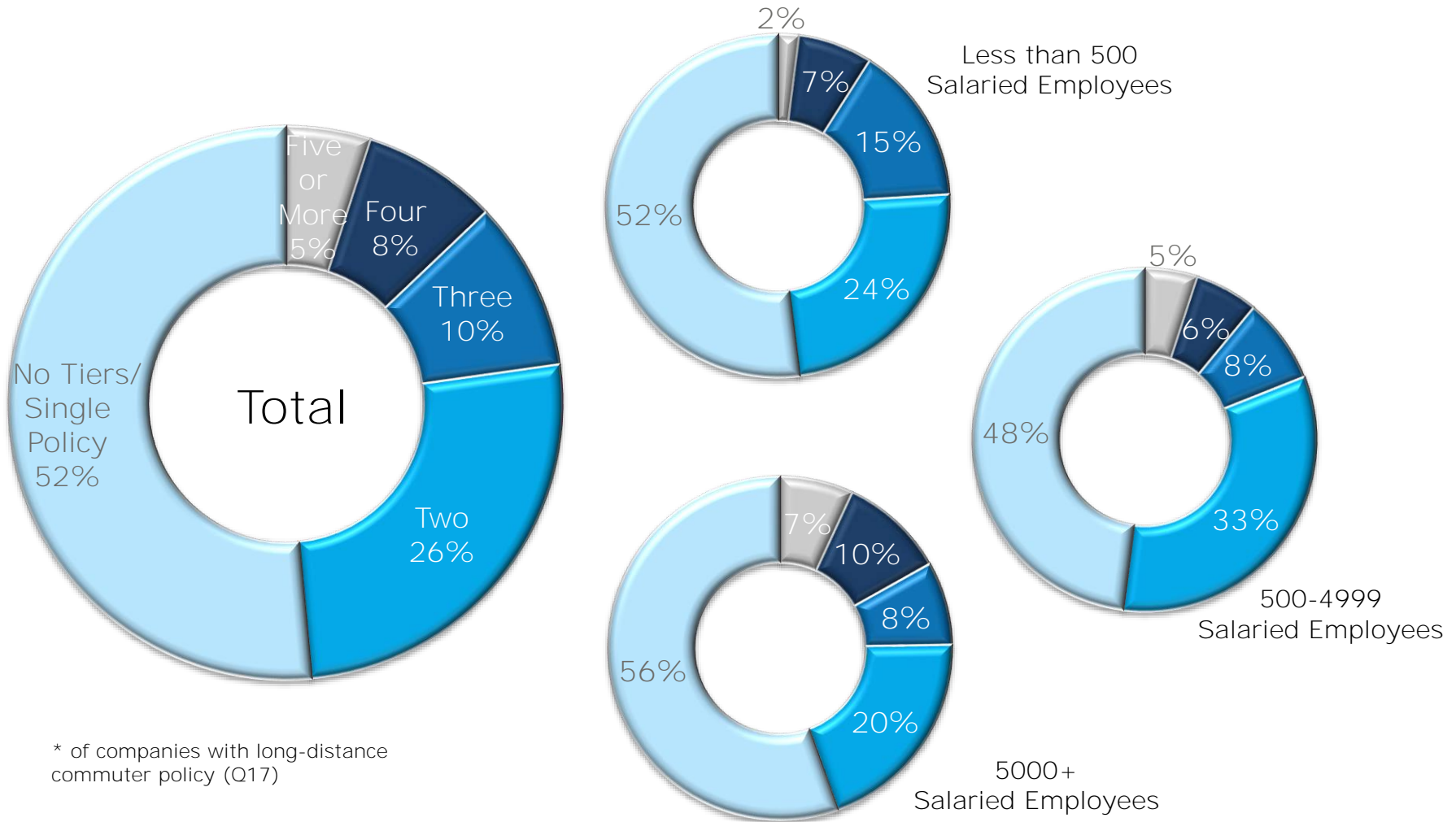
By Company Size (Salaried Employees)



\* of companies with extended business travel policy tiers/levels (Q18a-3)

# Policy Administration

Q.18a-4 – Does Your Company Have Different Tiers (or Levels) Within Its Long-Distance Commuter Policy?\*

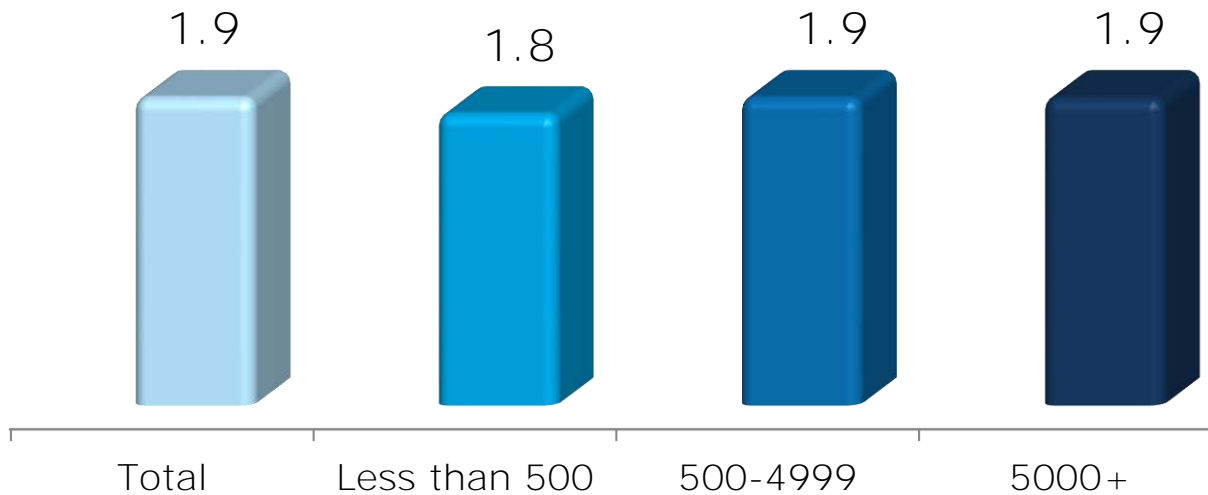


\* of companies with long-distance commuter policy (Q17)

# Policy Administration

Q. 18a-4 – Average Number of Tiers (or Levels) Within Long-Distance Commuter Policy\*

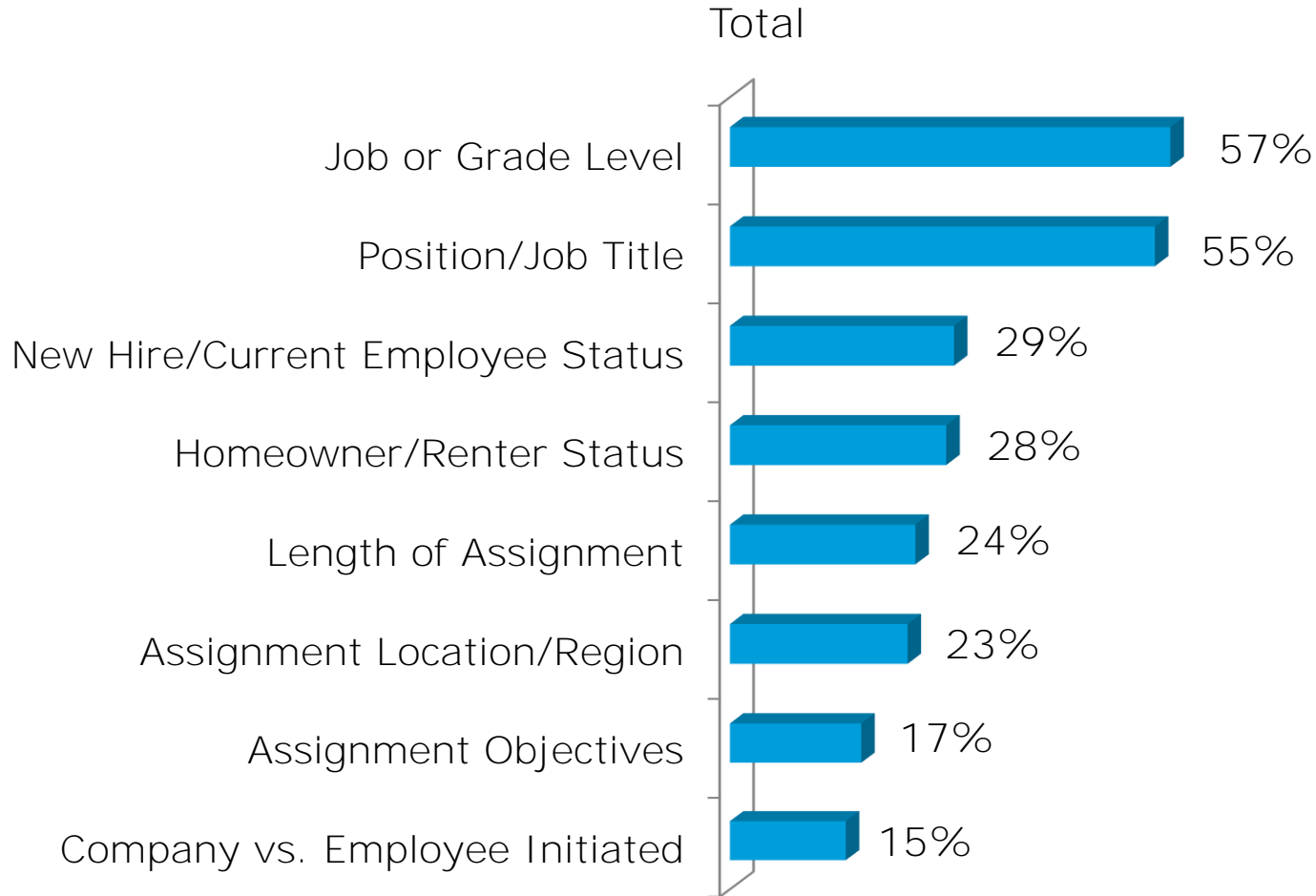
By Company Size (Salaried Employees)



\* of companies with long-distance commuter policy tiers/levels (Q18a-4)

# Policy Administration

Q.18b – What Are Your Different Tiers (or Levels) Based On?\*



\* of companies with domestic tiers/levels (Q18a-1)

# Policy Administration

*Q.18b – What Are Your Different Tiers (or Levels) Based On?\**

By Company Size (Salaried Employees)

<b>Bases for Domestic Policy Tiers (or Levels)</b>	<b>Total</b>	<b>Less than 500</b>	<b>500-4999</b>	<b>5000+</b>
Job or Grade Level (i.e. staff, management, professional, etc.)	57%	58%	55%	57%
Position/Job Title	55%	58%	53%	54%
New Hire/Current Employee Status	29%	23%	26%	37%
Homeowner/Renter Status	28%	23%	27%	32%
Length of Assignment	24%	18%	25%	27%
Assignment Location/Region	23%	21%	31%	18%
Assignment Objectives (i.e. developmental, etc.)	17%	17%	15%	19%
Company vs. Employee Initiated Relocation	15%	18%	12%	15%

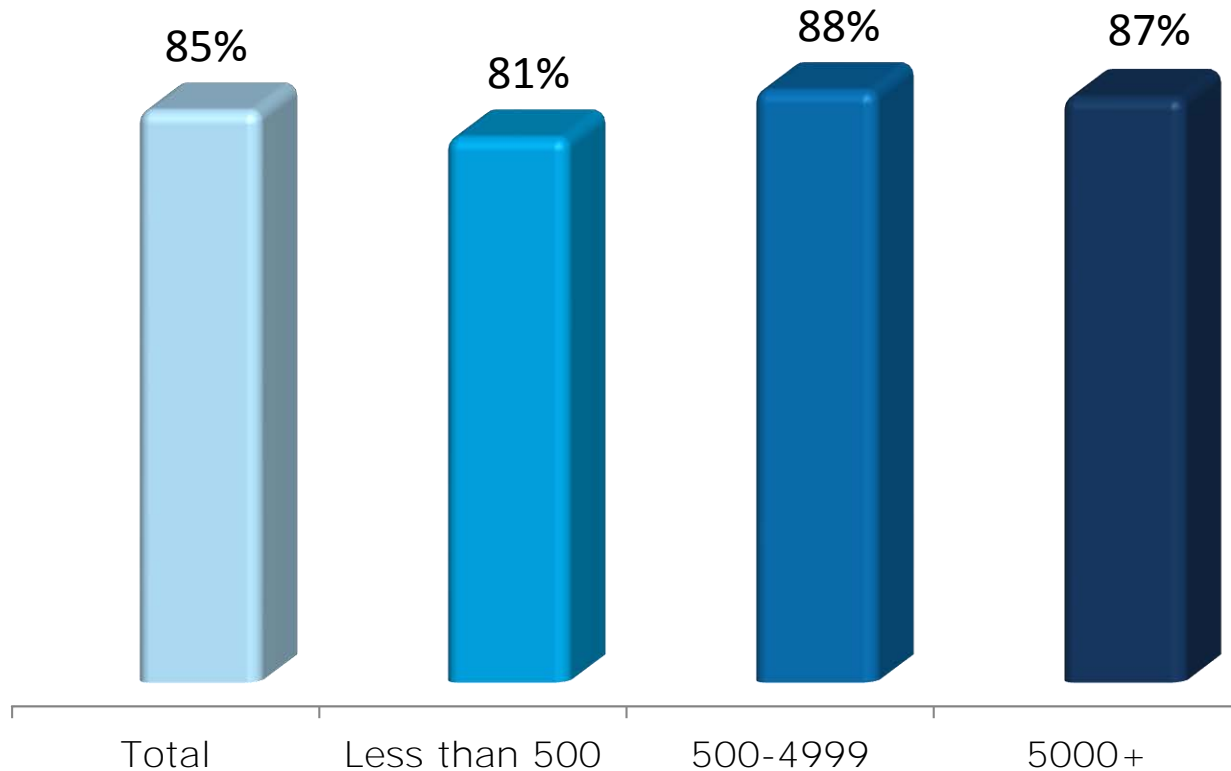
\* of companies with domestic tiers/levels (Q18a-1)



# Policy Administration

*Q. 19a – Companies Whose Formal Relocation Policy Utilizes Aspects of Core Coverage/Flex Policy\**

By Company Size (Salaried Employees)

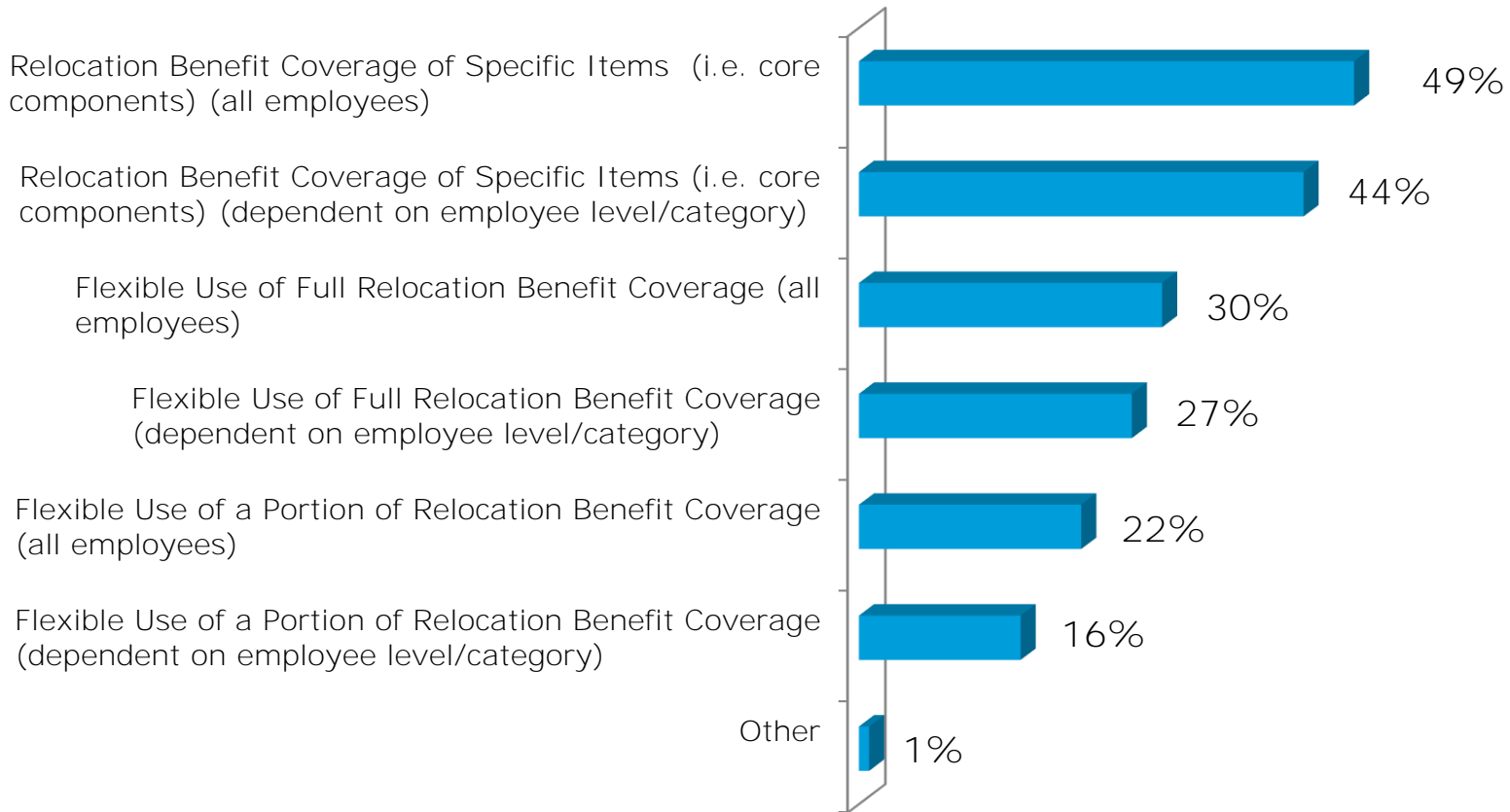


\* % of companies indicating "Yes"

# Policy Administration

Q. 19b – Aspects of Core Coverage/Flex Policy Incorporated into Relocation Policy\*

Total



\* of those using core coverage/flex policy elements (Q19a)

# Policy Administration

*Q.19b – Aspects of Core Coverage/Flex Policy Incorporated into Relocation Policy\**

By Company Size (Salaried Employees)

<b>Core Coverage/Flex Policy Elements</b>	<b>Total</b>	<b>Less than 500</b>	<b>500-4999</b>	<b>5000+</b>
Relocation Benefit Coverage of Specific Items (i.e. core components) (all employees)	49%	42%	46%	59%
Relocation Benefit Coverage of Specific Items (i.e. core components) (dependent on employee level/category)	44%	40%	43%	50%
Flexible Use of Full Relocation Benefit Coverage (all employees)	30%	29%	35%	26%
Flexible Use of Full Relocation Benefit Coverage (dependent on employee level/category)	27%	25%	32%	22%
Flexible Use of a Portion of Relocation Benefit Coverage (all employees)	22%	20%	25%	21%
Flexible Use of a Portion of Relocation Benefit Coverage (dependent on employee level/category)	16%	16%	15%	17%
Other	1%	2%	1%	1%

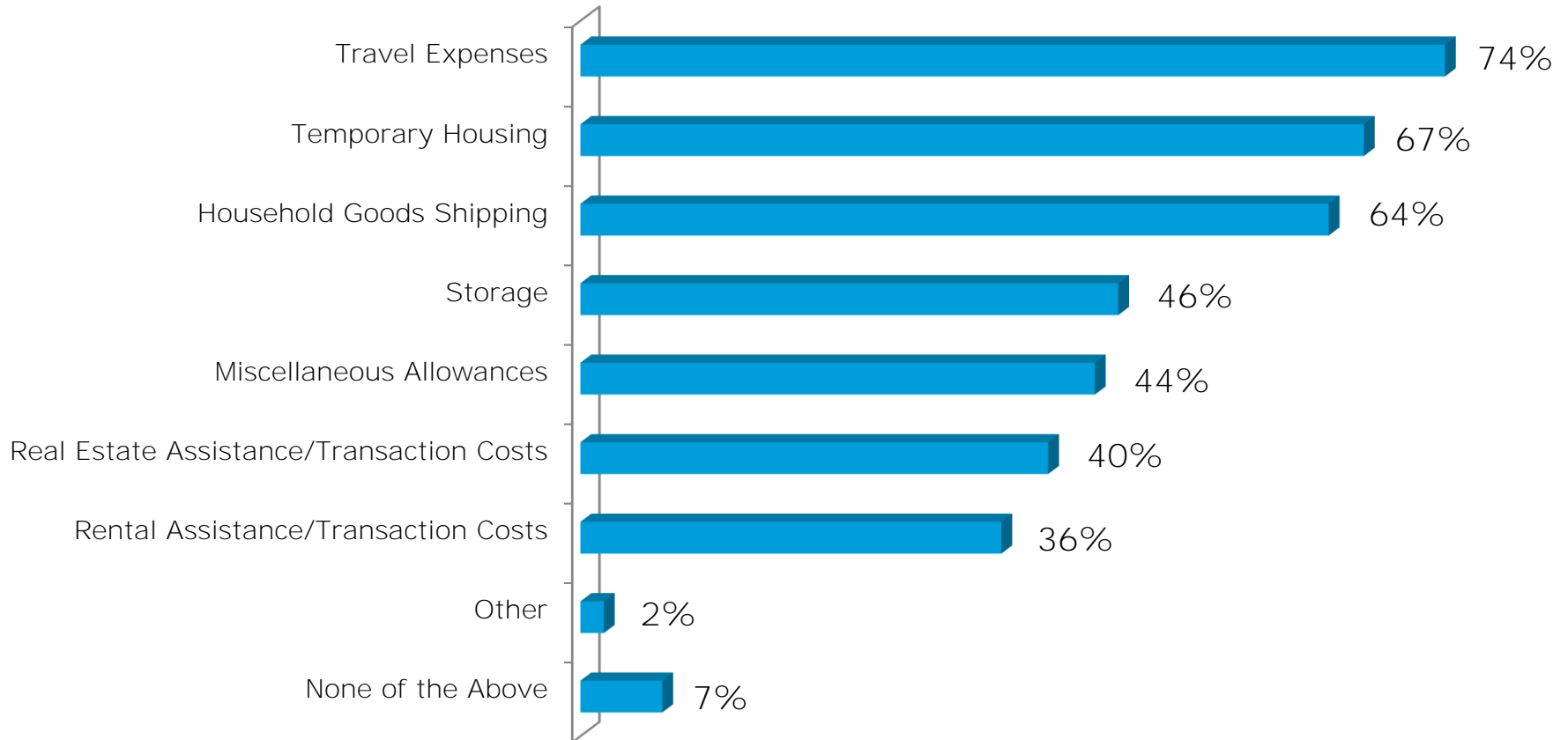
\* of those using "core coverage/flex policy" elements (Q19a)



# Policy Administration

Q. 19c – Relocation Costs That Are Considered Core Coverage/Fixed Benefits  
Within the Relocation Policy\*

Total



\* of those using "core coverage/flex policy" elements (Q19a)

# Policy Administration

*Q. 19c – Relocation Costs That Are Considered Core Coverage/Fixed Benefits  
Within the Relocation Policy\**

By Company Size (Salaried Employees)

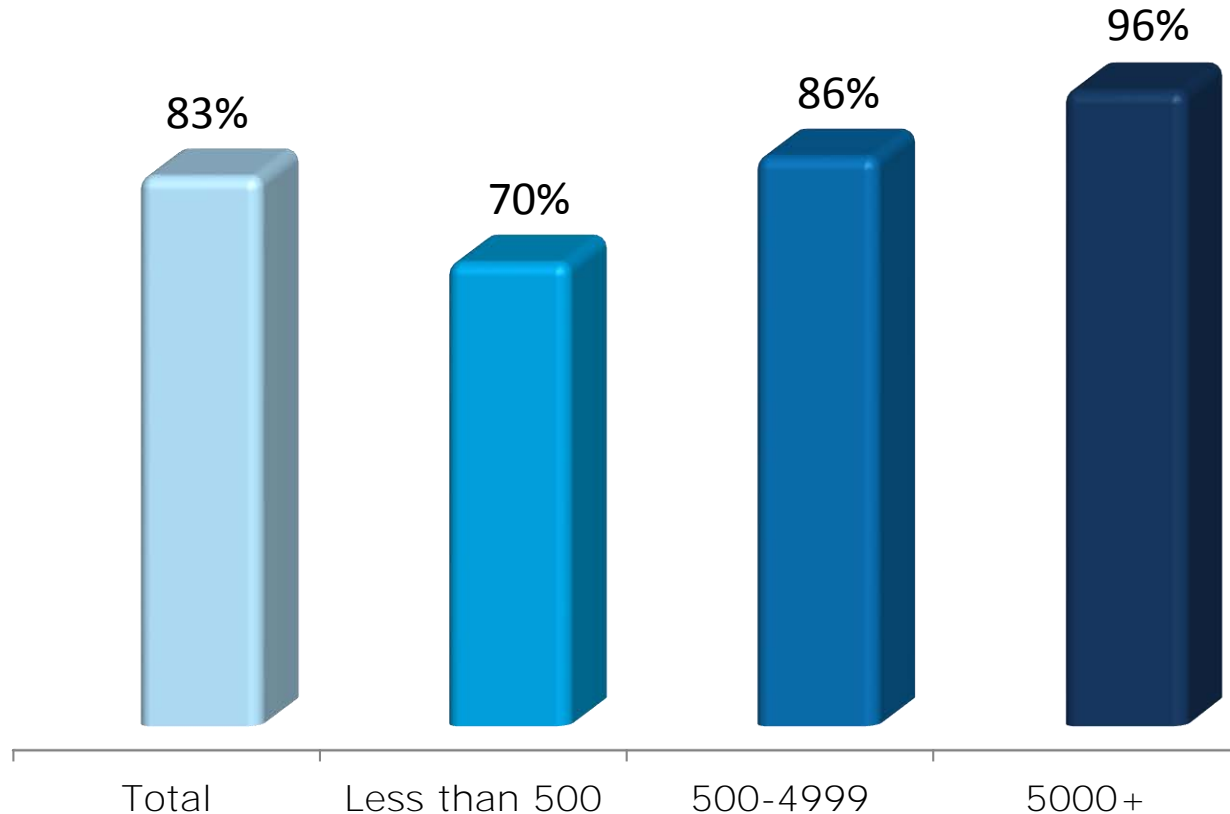
<b>Core Coverage/Flex Policy Costs</b>	<b>Total</b>	<b>Less than 500</b>	<b>500-4999</b>	<b>5000+</b>
Travel Expenses	74%	74%	74%	73%
Temporary Housing	67%	59%	74%	68%
Household Goods Shipping	64%	58%	61%	76%
Storage	46%	37%	47%	56%
Miscellaneous Allowances	44%	36%	41%	55%
Real Estate Assistance/Transaction Costs	40%	34%	41%	48%
Rental Assistance/Transaction Costs	36%	34%	34%	42%
Other	2%	1%	1%	4%
None of the Above Are Considered Core Coverage/Fixed Benefits	7%	8%	5%	7%

\* of those using "core coverage/flex policy" elements (Q19a)

# Policy Administration

*Q.20a – Companies Who Administer Employee Relocations from a Centralized Department/Team\**

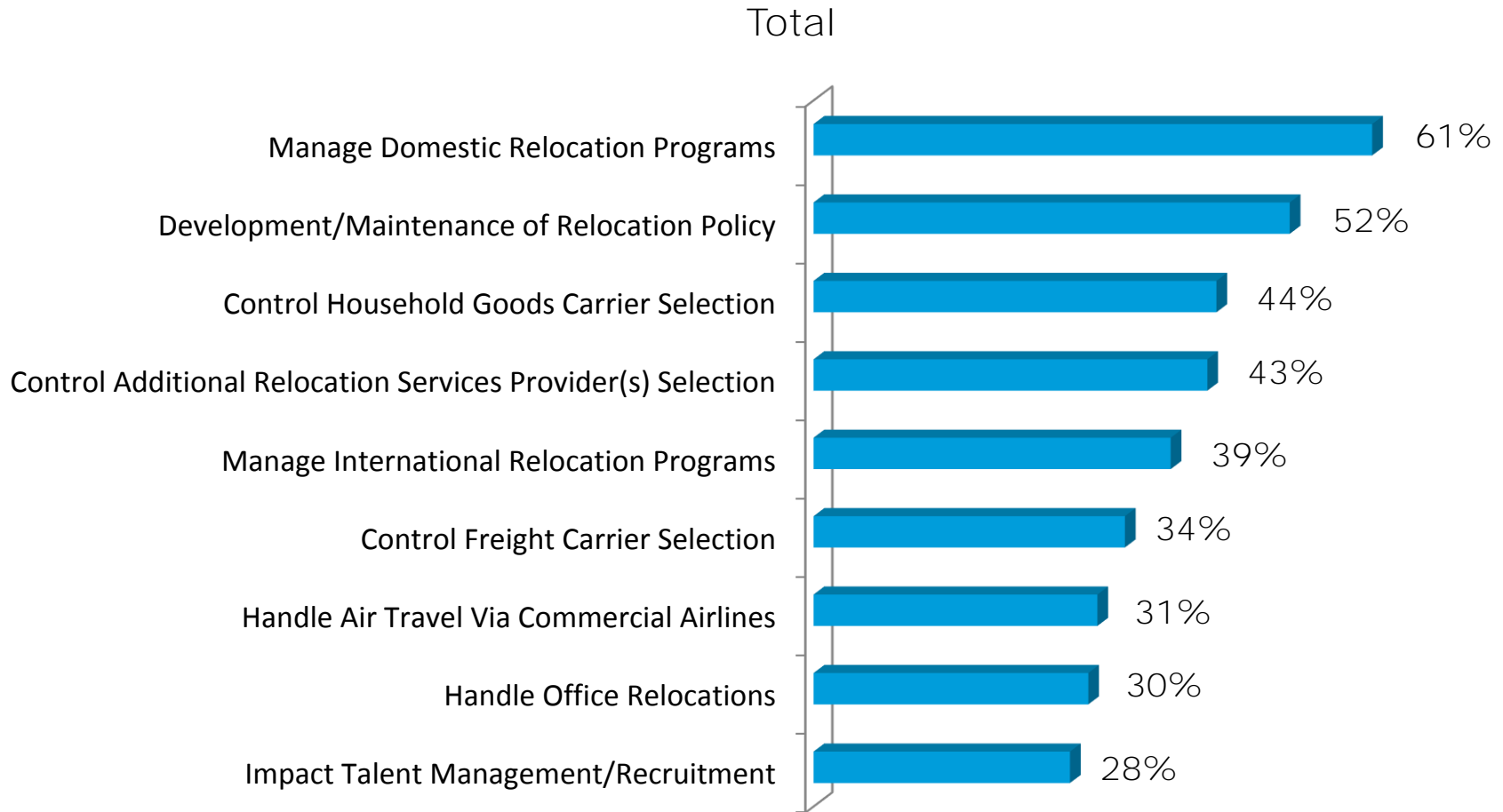
By Company Size (Salaried Employees)



\* % of companies indicating "Yes"

# Policy Administration

Q.20b - Does Your Company's Centralized Relocation Department/Team... \*



\* of those with a centralized relocation department (Q20a) /  
excludes those who "don't know"

# Policy Administration

Q.20b - Does Your Company's Centralized Relocation Department/Team... \*

By Company Size (Salaried Employees)

Centralized Relocation Dept/Team Duties	Total	Less than 500	500-4999	5000+
Manage Domestic Relocation Programs	61%	46%	58%	75%
Development/Maintenance of Relocation Policy	52%	44%	50%	61%
Control Household Goods Carrier Selection	44%	44%	37%	50%
Control Additional Relocation Services Provider(s) Selection	43%	30%	38%	58%
Manage International Relocation Programs	39%	25%	34%	56%
Control Freight Carrier Selection (air, land, sea or rail)	34%	24%	34%	43%
Handle Air Travel Via Commercial Airlines	31%	35%	29%	29%
Handle Office Relocations	30%	29%	38%	24%
Impact Talent Management/Recruitment Decisions/Processes	28%	28%	21%	36%

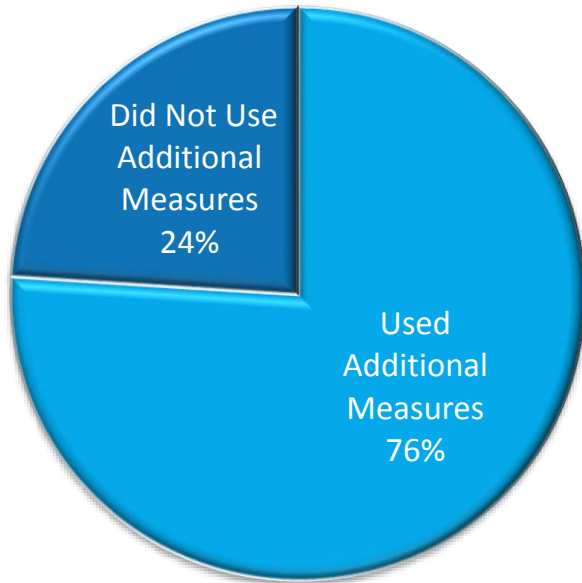
\* of those with a centralized relocation department (Q20a) / excludes those who "don't know"



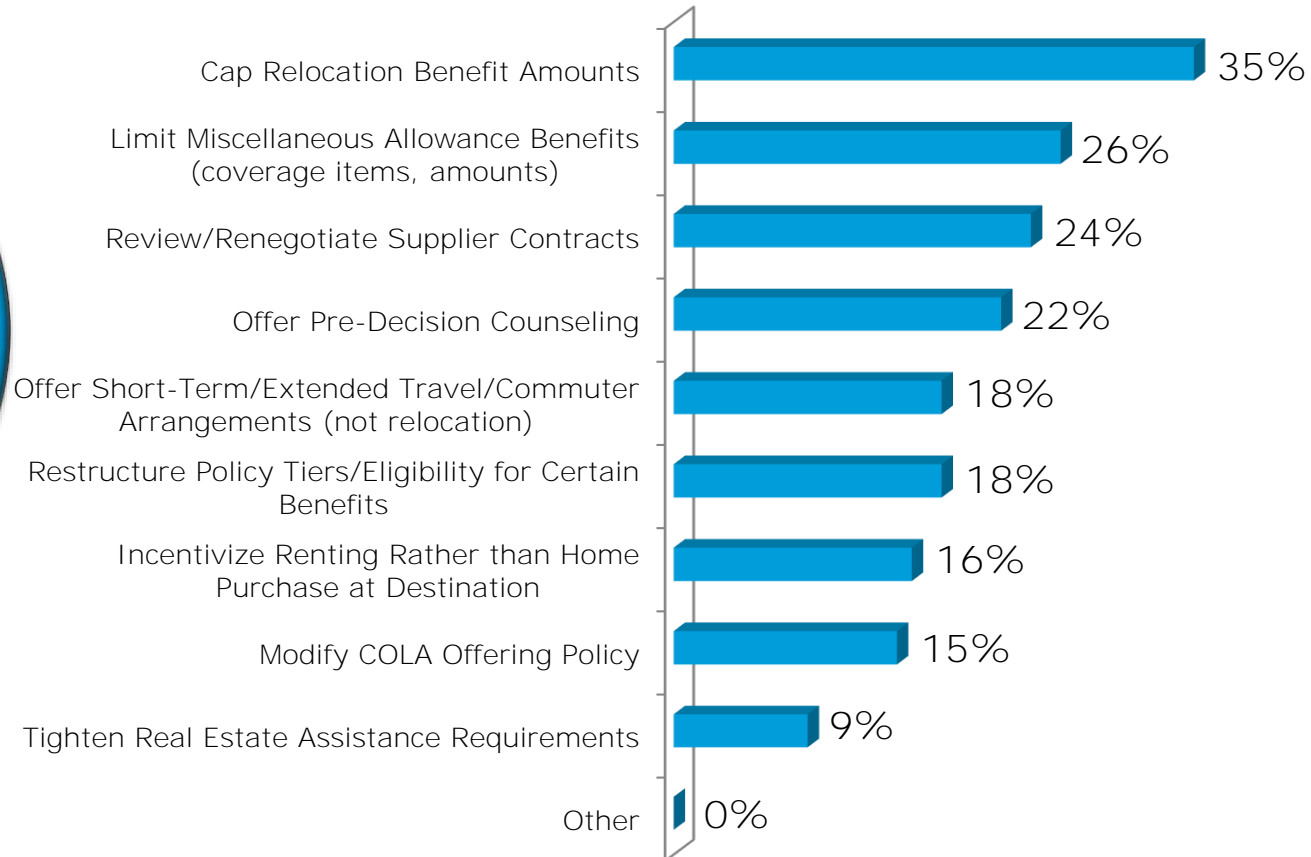
# Policy Administration

Q.21 – Respondents were given a list of cost containment measures that could have been used in relocation policy/practice in 2015 – **the answers received indicate that...**

Total



Total  
Cost Containment Measures Used



# Policy Administration

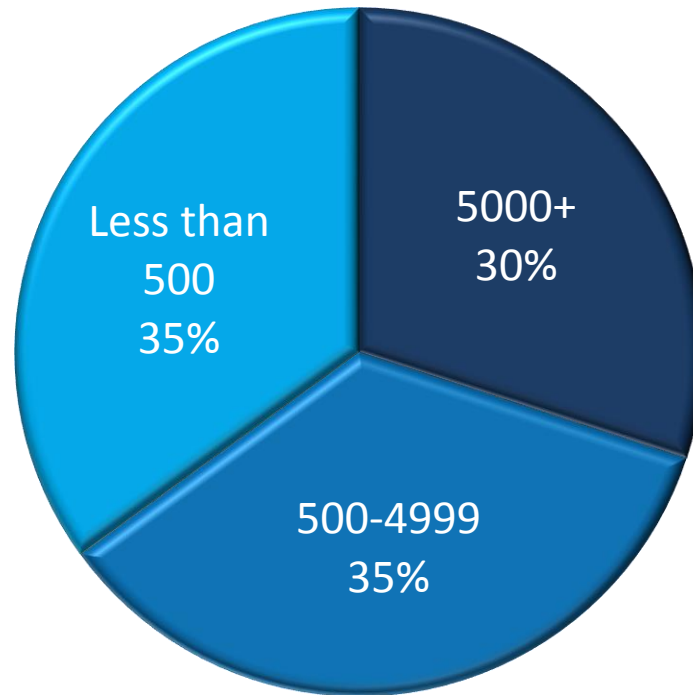
*Q.21 – Cost Containment Measures in Relocation Policy/Practice Used in 2015*  
By Company Size (Salaried Employees)

<b>Cost Containment Measures Used</b>	<b>Total</b>	<b>Less than 500</b>	<b>500-4999</b>	<b>5000+</b>
No Cost Containment Measures Beyond Typical Relocation Policy or Program Utilized	24%	30%	26%	16%
Cap Relocation Benefit Amounts	35%	35%	32%	38%
Limit Miscellaneous Allowance Benefits (coverage items, amounts)	26%	27%	21%	31%
Review/Renegotiate Supplier Contracts	24%	17%	21%	36%
Offer Pre-Decision Counseling	22%	17%	19%	33%
Offer Short-Term/Extended Travel/Commuter Arrangements Rather than Relocate Employees	18%	17%	16%	21%
Restructure Policy Tiers/Eligibility for Certain Benefits (i.e. add/reduce/redefine tiers, implement core/flex, etc.)	18%	11%	18%	24%
Incentivize Renting Rather than Home Purchase at Destination	16%	19%	14%	13%
Modify COLA Offering Policy	15%	7%	16%	24%
Tighten Real Estate Assistance Requirements	9%	6%	14%	9%
Other	0%	1%	1%	0%

# Policy Administration

*Q.22 – Number of Salaried (Non-Hourly) People Employed by Company*

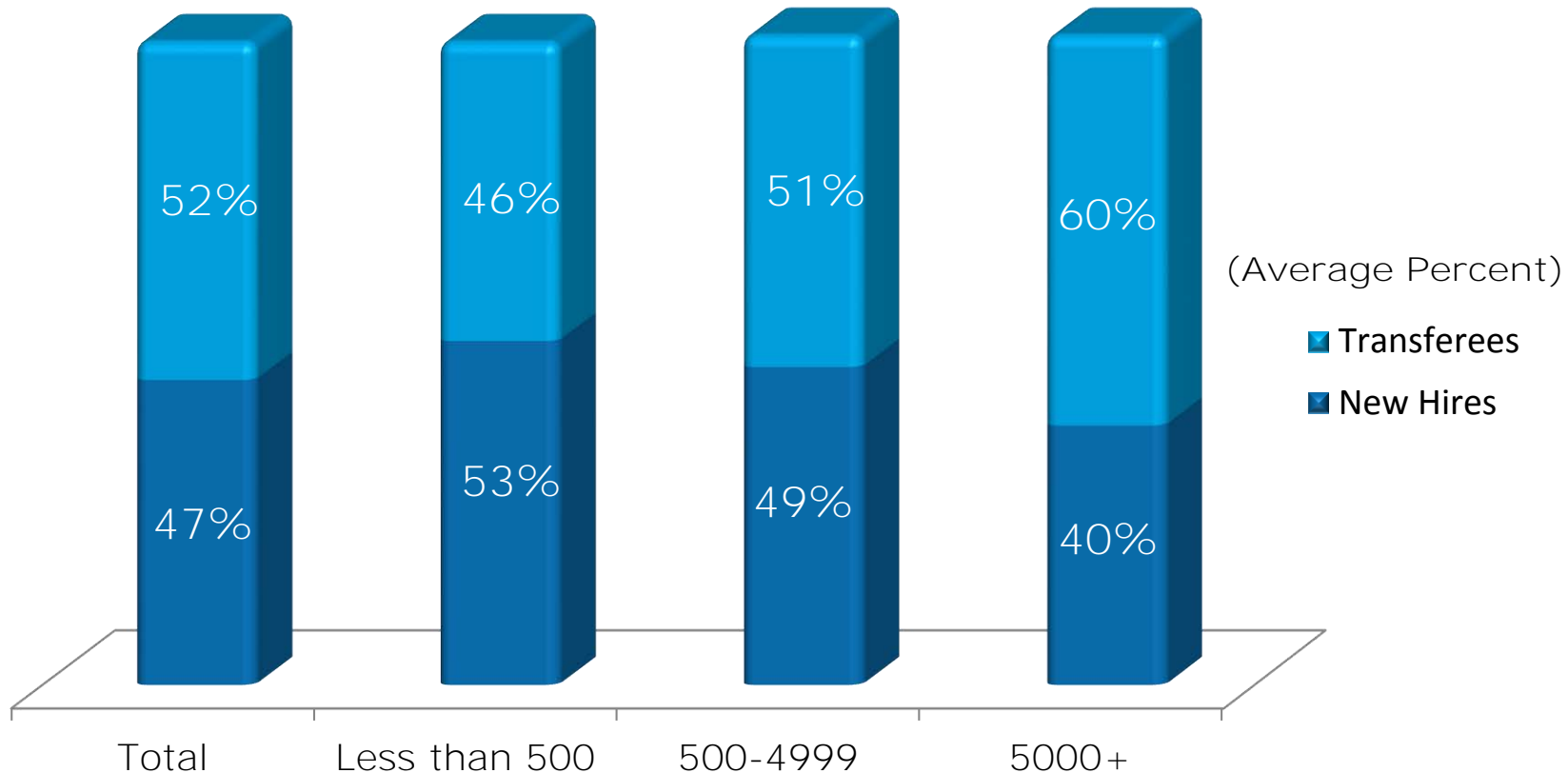
By Company Size (Salaried Employees)



# Policy Administration

Q.23 – In 2015, What Approximate Percentage of Your Company’s Relocating Employees Were (at Origin): \*

By Company Size (Salaried Employees)

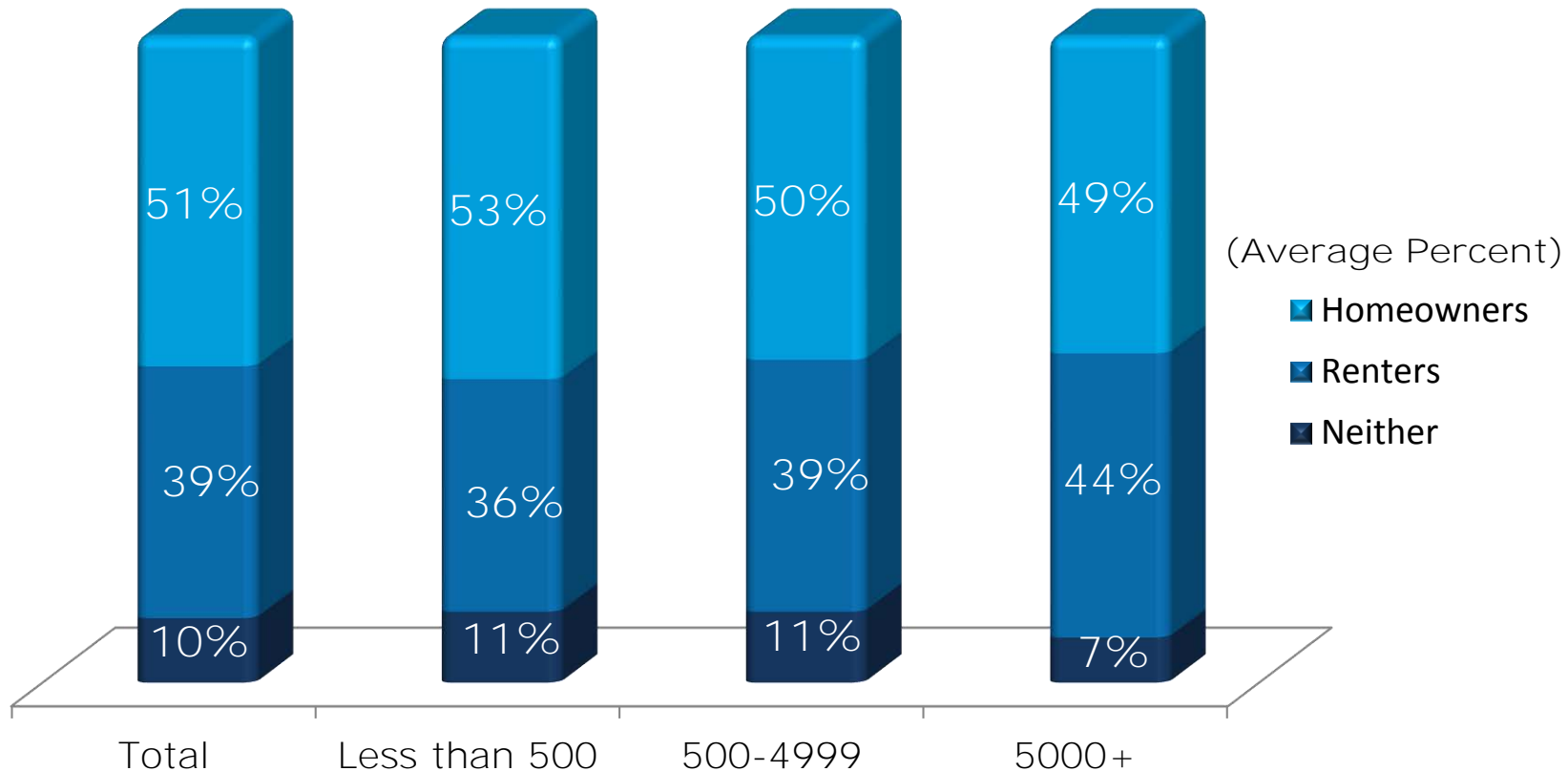


\* excludes those who “don’t know”

# Policy Administration

Q.23 – In 2015, What Approximate Percentage of Your Company’s Relocating Employees Were (at Origin): \*

By Company Size (Salaried Employees)

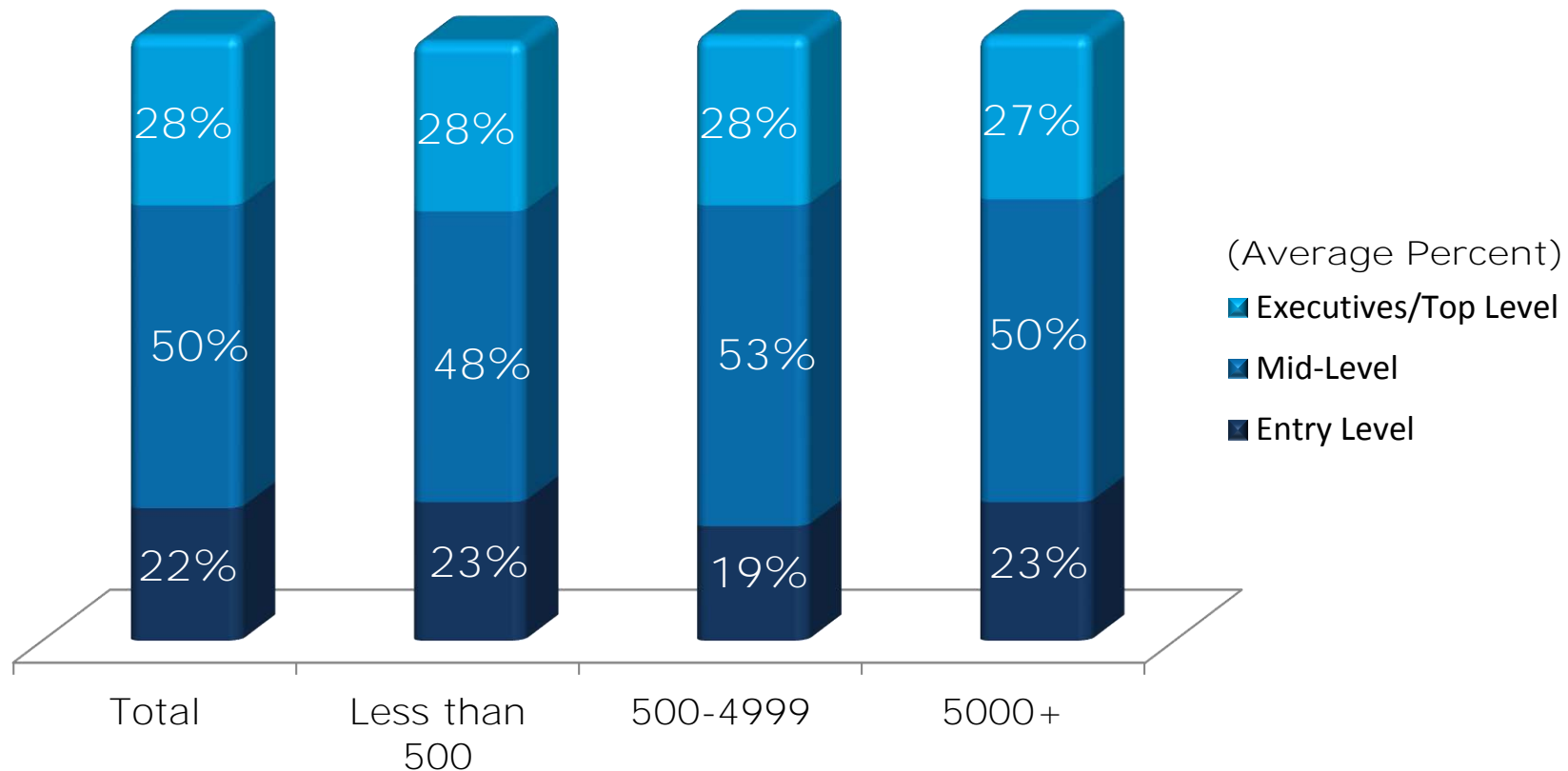


\* excludes those who “don’t know”

# Policy Administration

Q.23 – In 2015, What Approximate Percentage of Your Company’s Relocating Employees Were (at Origin): \*

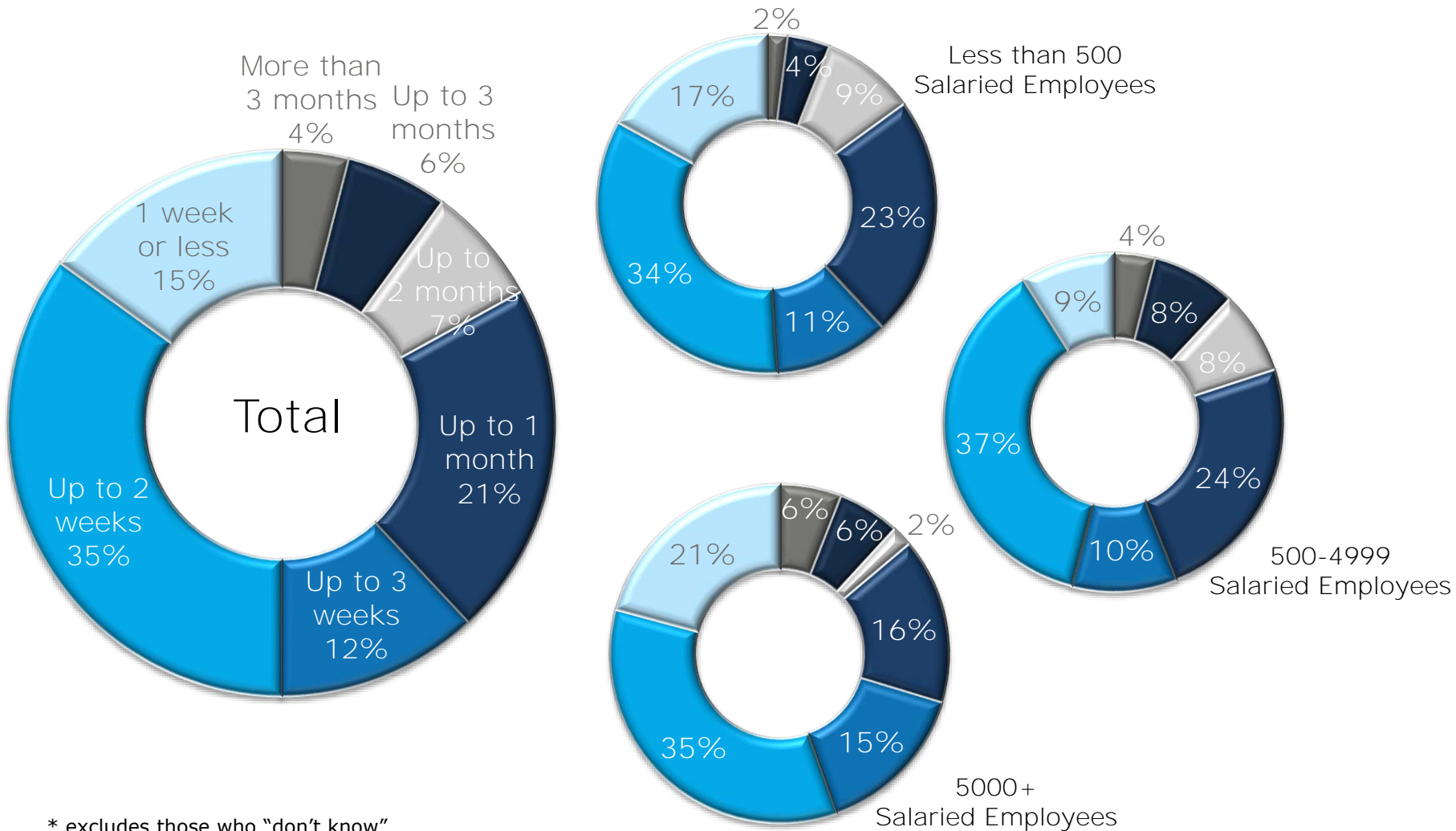
By Company Size (Salaried Employees)



\* excludes those who “don’t know”

# Policy Administration

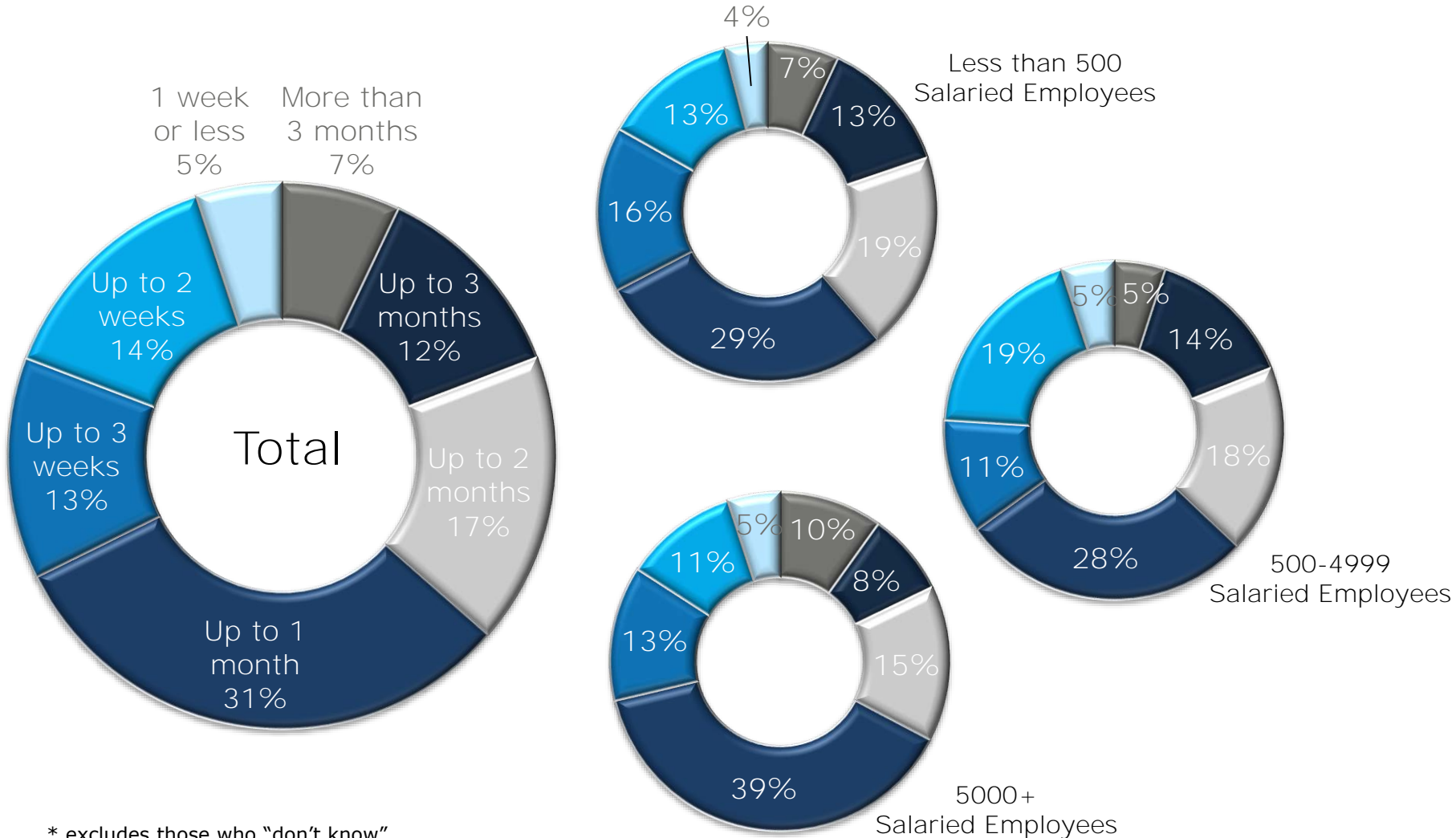
Q.24a – Length of Time Employees Have to Accept a Relocation Offer\*



\* excludes those who "don't know"

# Policy Administration

Q.24b – Length of Time Employees Have to Report to Work at the New Location\*



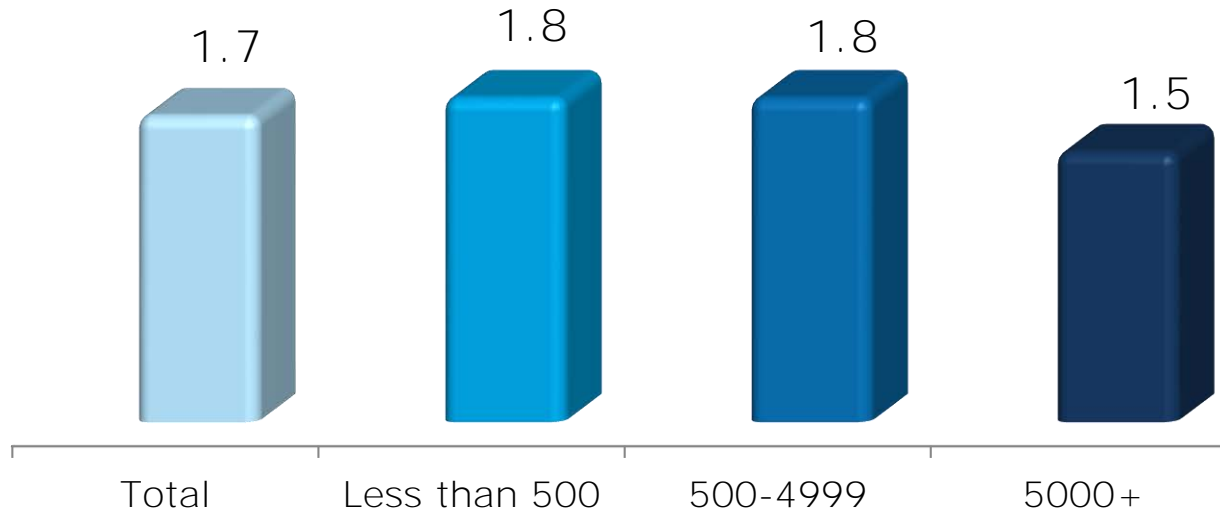
\* excludes those who "don't know"



# Policy Administration

*Q.25a – Average Number of Expense-Paid TRIPS with SPOUSE/PARTNER to Find Housing in New Location\**

By Company Size (Salaried Employees)

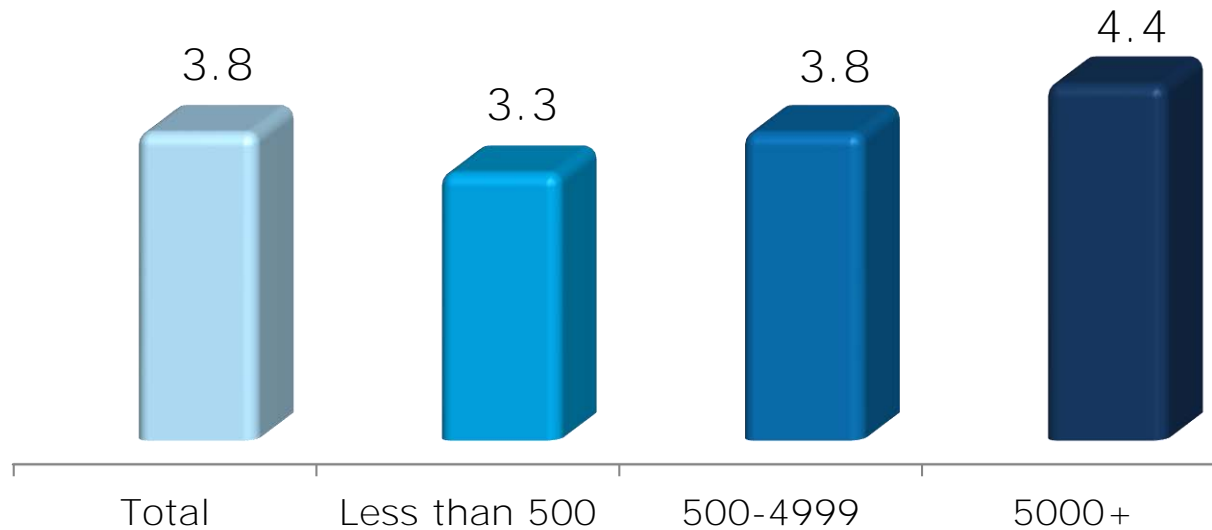


\* excludes those who "don't know"

# Policy Administration

*Q.25b – Average Number of Expense-Paid DAYS EMPLOYEES are Allowed for House-Hunting Trips\**

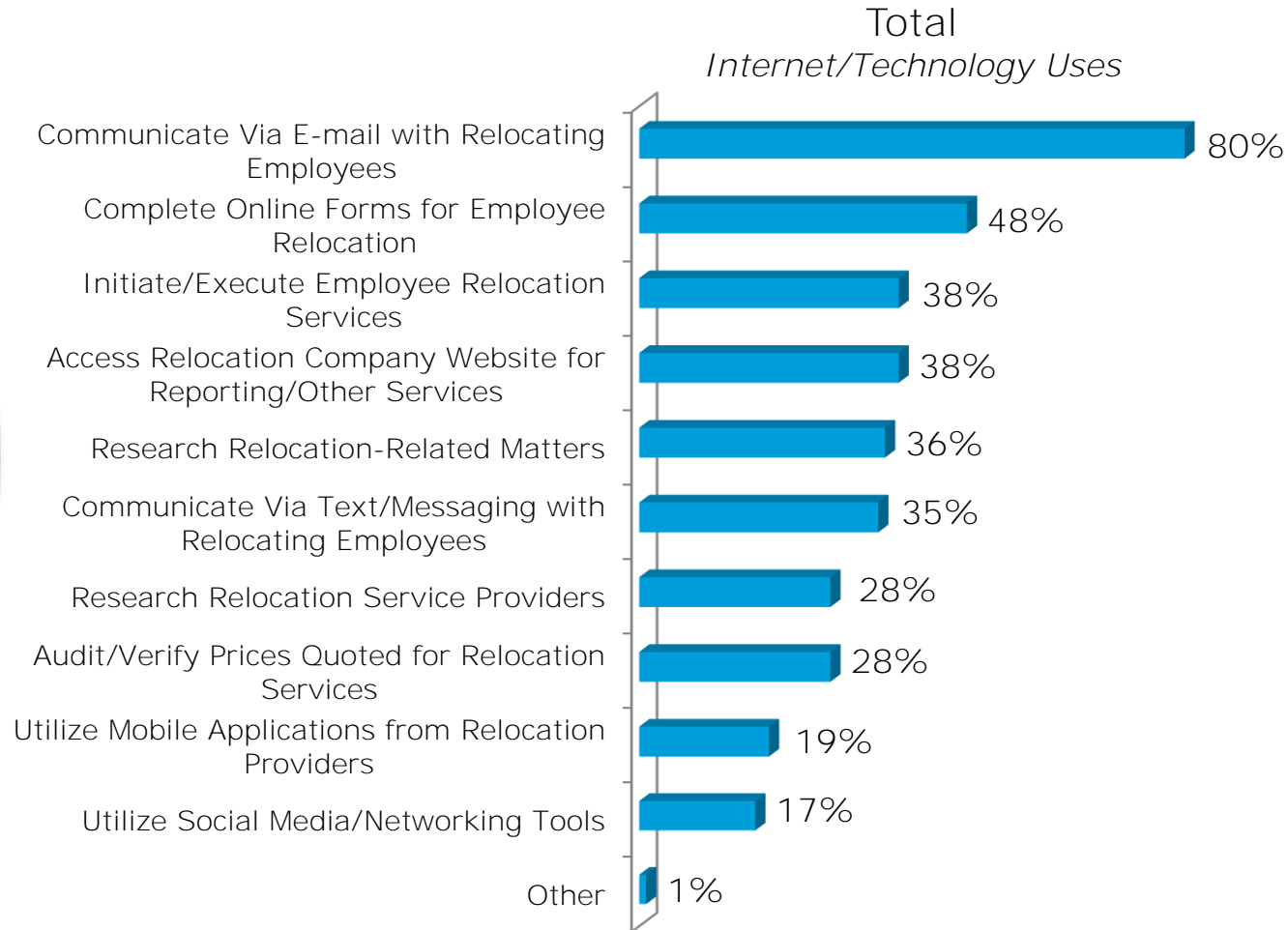
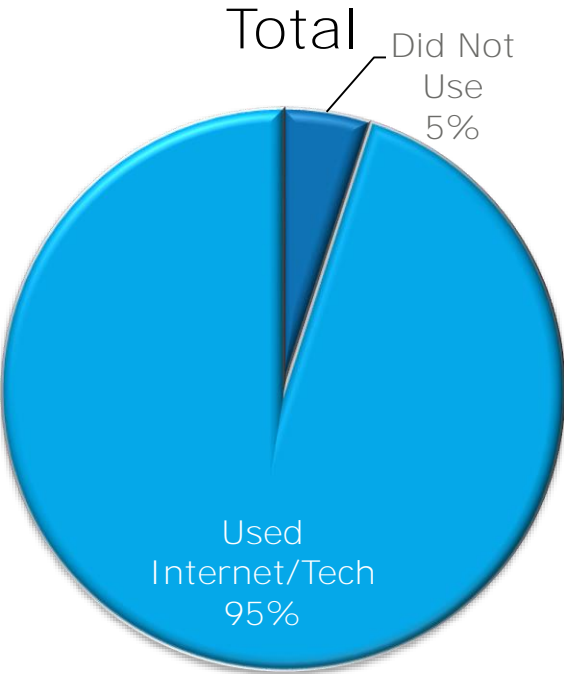
By Company Size (Salaried Employees)



\* excludes those who "don't know"

# Policy Administration

Q.26 – Respondents were given a list of possible relocation-related uses for the Internet/Technology in 2015 – **the answers received indicate that...**



# Policy Administration

Q.26 – How the Internet/Technology Was Used for Relocation-Related Matters in 2015

By Company Size (Salaried Employees)

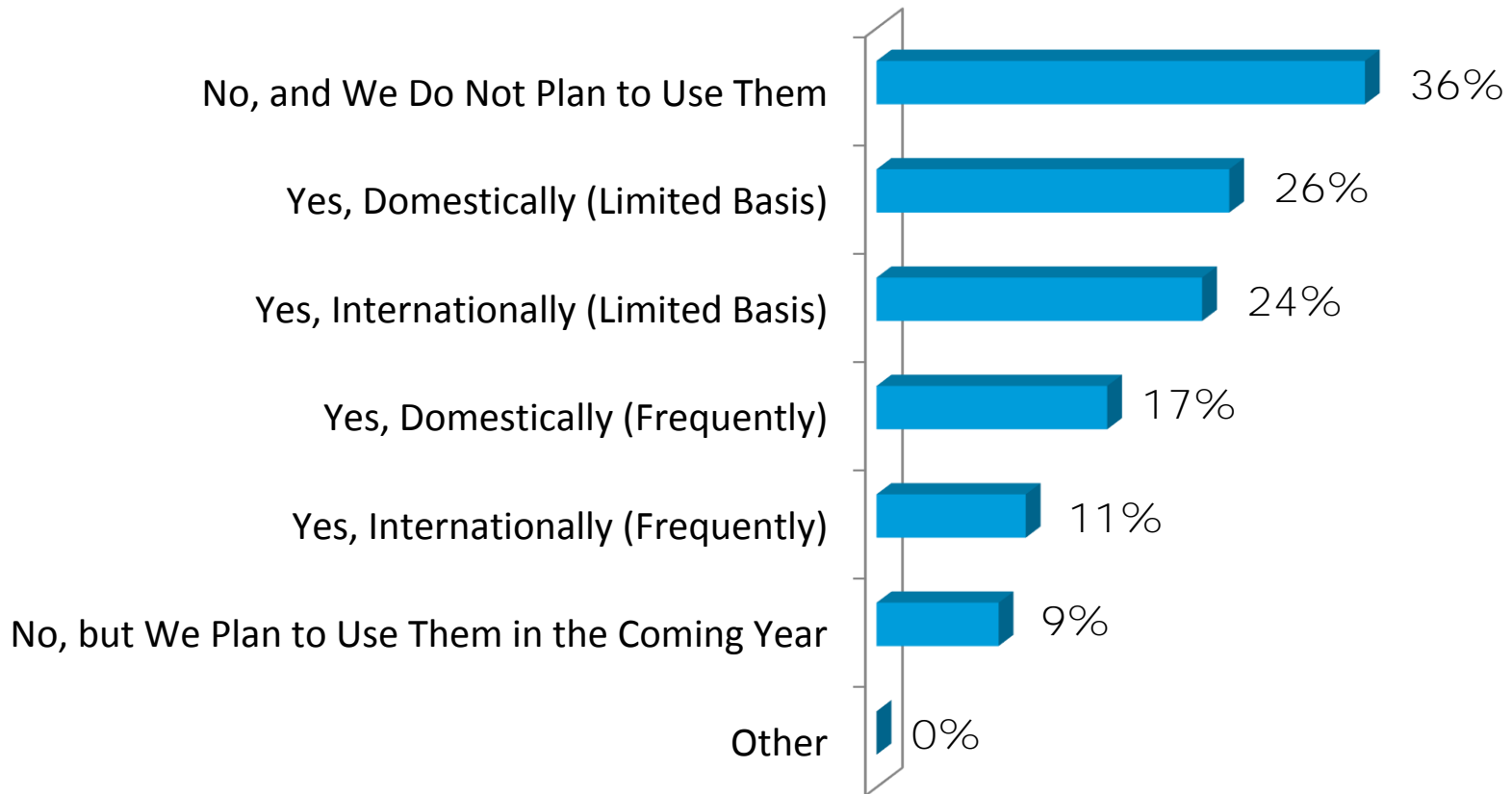
Internet/Technology Use	Total	Less than 500	500-4999	5000+
Did Not Use the Internet/Technology for Relocation-Related Matters in 2015	5%	9%	3%	3%
Communicate Via E-mail with Relocating Employees	80%	76%	78%	86%
Complete Online Forms for Employee Relocation	48%	34%	51%	60%
Initiate/Execute Employee Relocation Services	38%	26%	38%	53%
Access Relocation Company Website for Reporting or Other Services	38%	29%	33%	54%
Research Relocation-Related Matters (policy, benchmarking, etc.)	36%	24%	37%	47%
Communicate via Text/Messaging with Relocating Employees	35%	38%	34%	32%
Research Relocation Service Providers	28%	21%	29%	34%
Audit/Verify Prices Quoted for Relocation Services	28%	33%	27%	23%
Utilize Mobile Applications from Relocation Providers	19%	12%	21%	26%
Utilize Social Media/Networking Tools	17%	17%	17%	16%
Other	1%	1%	1%	1%



# Policy Administration

Q.27 – Is Your Company Utilizing "Alternative Assignments"…?

Total



# Policy Administration

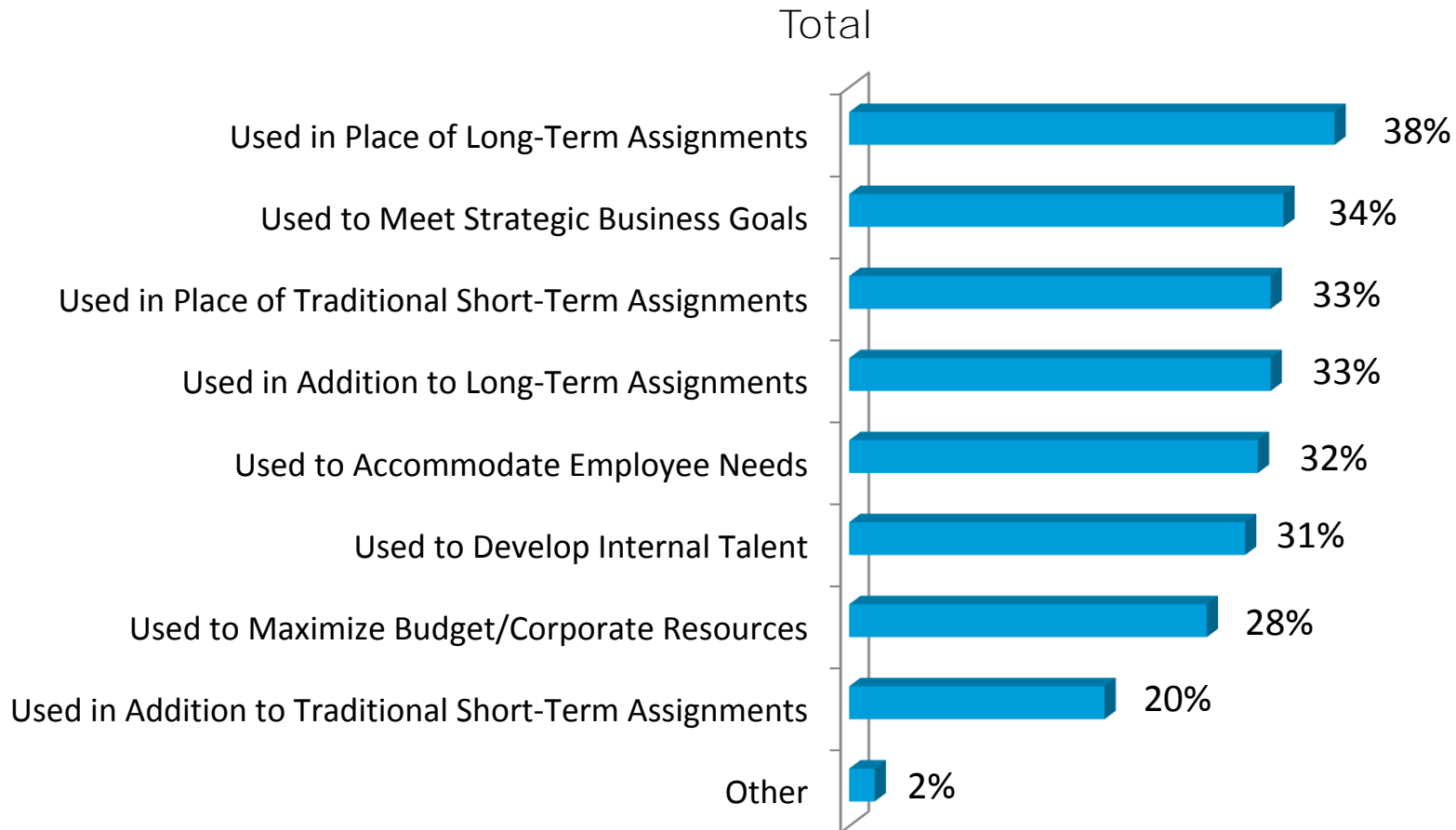
## Q.27 – Is Your Company Utilizing "Alternative Assignments"...?

By Company Size (Salaried Employees)

Alternative Assignments Use	Total	Less than 500	500-4999	5000+
No, and We Do Not Plan to Use Them	36%	46%	32%	28%
Yes, Domestically (Limited Basis)	26%	25%	29%	24%
Yes, Internationally (Limited Basis)	24%	13%	28%	32%
Yes, Domestically (Frequently)	17%	14%	16%	20%
Yes, Internationally (Frequently)	11%	6%	10%	17%
No, but We Plan to Use Them in the Coming Year	9%	10%	9%	7%
Other	0%	0%	1%	0%

# Policy Administration

Q.27a – How Are These “Alternative Assignment” Arrangements Incorporated into Your Organization’s Overall Employee Mobility Strategy?\*



\* of those utilizing “alternative assignments” (Q27)

# Policy Administration

*Q.27a – How Are These “Alternative Assignment” Arrangements Incorporated into Your Organization’s Overall Employee Mobility Strategy?\**

By Company Size (Salaried Employees)

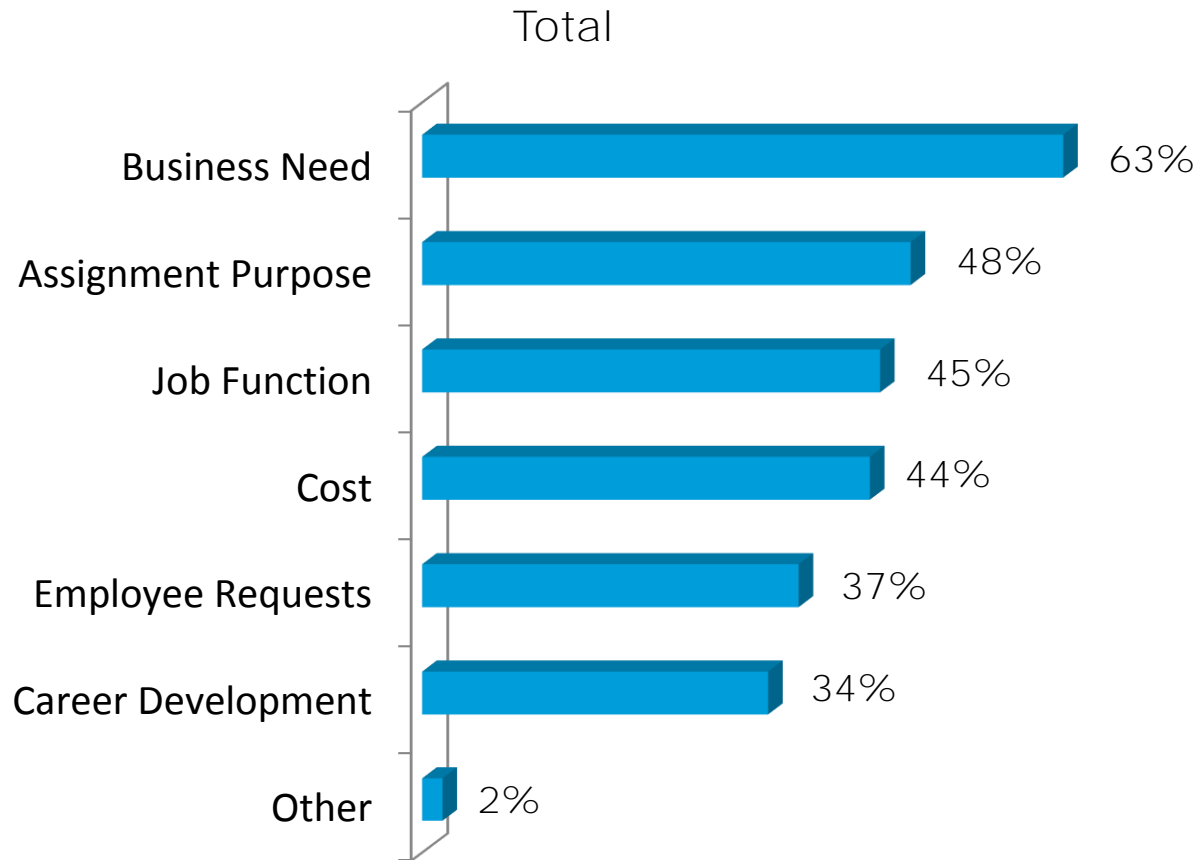
Alternative Assignment Incorporation	Total	Less than 500	500-4999	5000+
Used in Place of Long-Term Assignments	38%	37%	44%	32%
Used to Meet Strategic Business Goals	34%	31%	34%	35%
Used in Place of Traditional Short-Term Assignment Arrangements	33%	41%	39%	19%
Used in Addition to Long-Term Assignments	33%	29%	33%	35%
Used to Accommodate Employee Needs	32%	30%	33%	32%
Used to Develop Internal Talent	31%	25%	32%	33%
Used to Maximize Budget/Corporate Resources	28%	28%	31%	24%
Used in Addition to Traditional Short-Term Assignment Arrangements	20%	17%	13%	29%
Other	2%	1%	2%	3%

\* of those utilizing “alternative assignments” (Q27)



# Policy Administration

Q.27b – Key Factors Determining "Alternative Assignment" Use\*



\* of those utilizing "alternative assignments" (Q27)

# Policy Administration

## Q.27b – Key Factors Determining "Alternative Assignment" Use\*

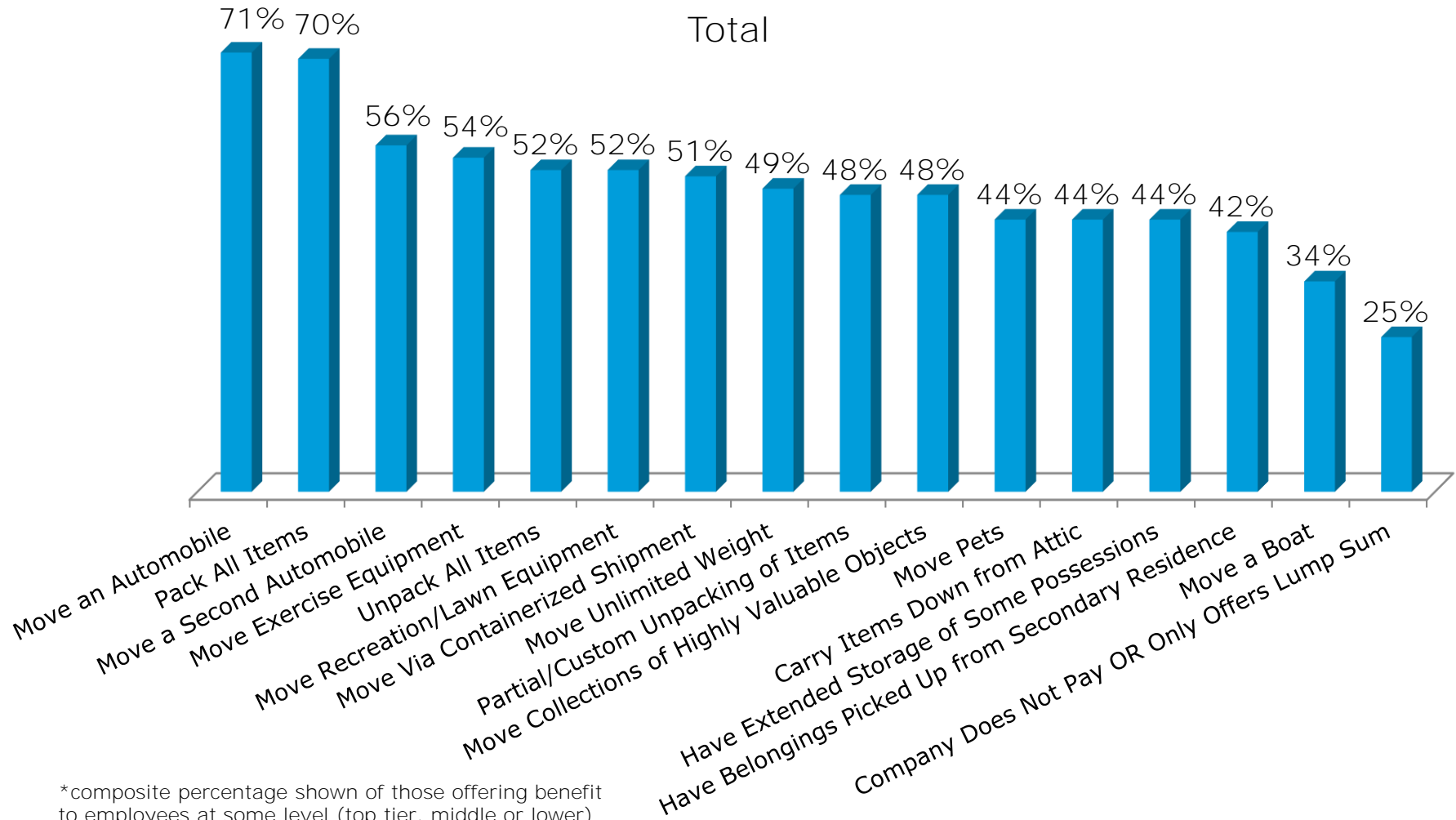
By Company Size (Salaried Employees)

Key Factors Determining "Alternative Assignment" Use	Total	Less than 500	500-4999	5000+
Business Need	63%	60%	63%	65%
Assignment Purpose	48%	43%	49%	53%
Job Function	45%	49%	48%	38%
Cost	44%	39%	43%	49%
Employee Requests	37%	39%	36%	36%
Career Development	34%	35%	37%	30%
Other	2%	1%	1%	3%

\* of those utilizing "alternative assignments" (Q27)

# Relocation Costs

Q.28 – Does Your Company Reimburse/Pay to... (for Transferees OR New Hires) \*



\*composite percentage shown of those offering benefit to employees at some level (top tier, middle or lower)



# Relocation Costs

*Q.28 – Does Your Company Reimburse/Pay to... (for Transferees OR New Hires) \**  
By Company Size (Salaried Employees)

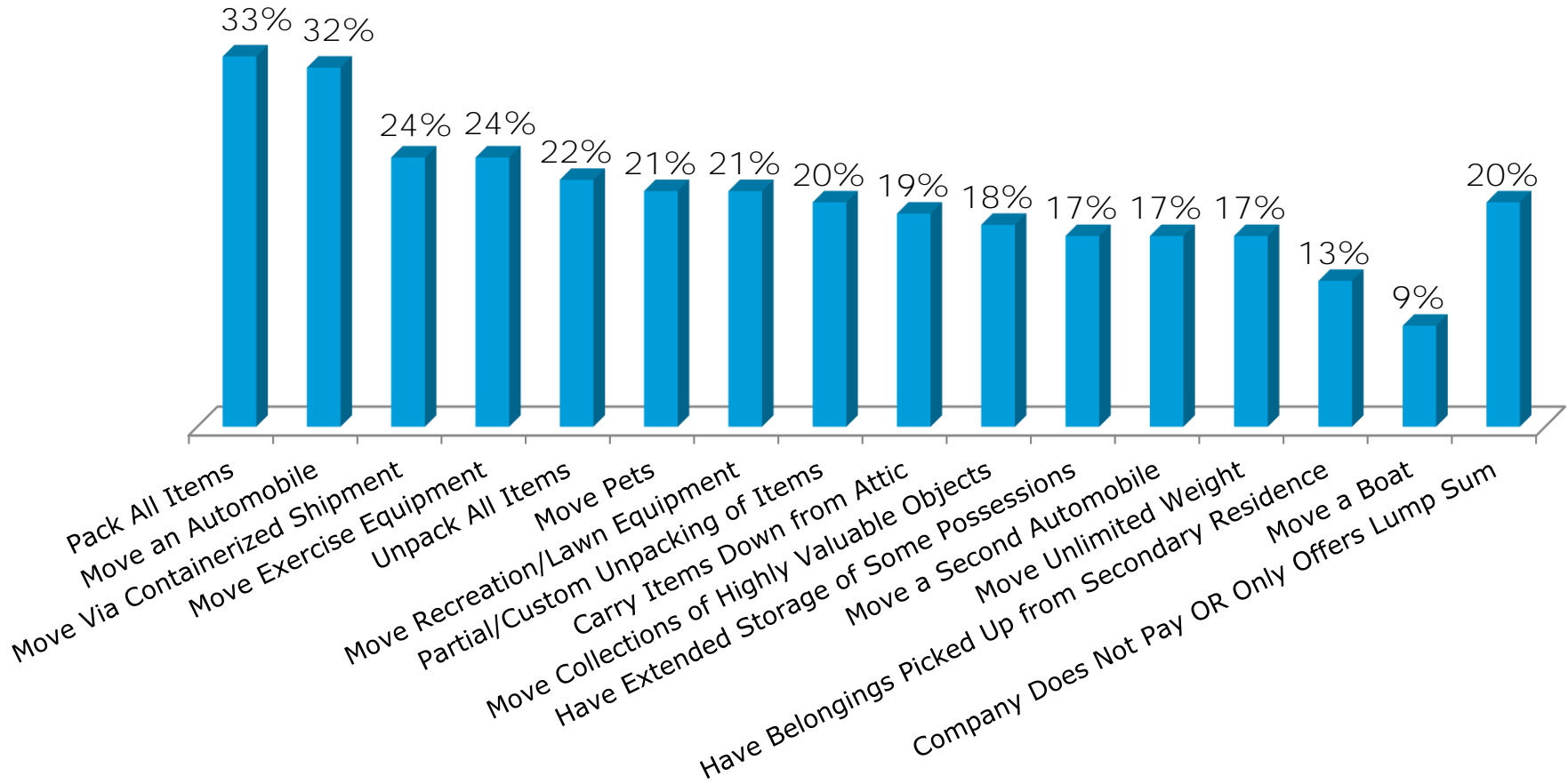
Covered Relocation Expenses	Total	Less than 500	500-4999	5000+
Company Does Not Pay OR Only Offers Lump Sum	25%	35%	22%	17%
Move an Automobile	71%	62%	68%	86%
Pack All Items	70%	57%	67%	90%
Move a Second Automobile	56%	50%	52%	66%
Move Exercise Equipment	54%	51%	53%	58%
Unpack All Items	52%	46%	46%	66%
Move Recreation and Lawn Equipment	52%	47%	51%	58%
Move Via Containerized Shipment	51%	48%	48%	59%
Move Unlimited Weight	49%	41%	50%	57%
Partial/Custom Unpacking of Items	48%	41%	51%	53%
Move Collections of Highly Valuable Objects	48%	43%	45%	57%
Move Pets	44%	44%	46%	43%
Carry Items Down from Attic	44%	38%	43%	52%
Have Extended Storage of Some Possessions	44%	42%	43%	48%
Have Belongings Picked Up from a Secondary Residence (summer home, relative's home, etc.)	42%	41%	42%	41%
Move a Boat	34%	35%	32%	35%

\*composite percentage shown of those offering benefit to employees at some level (top tier, middle or lower)

# Relocation Costs

Q.28 – Does Your Company Reimburse/Pay to... (for Transferees OR New Hires)

Entry Level – Total



# Relocation Costs

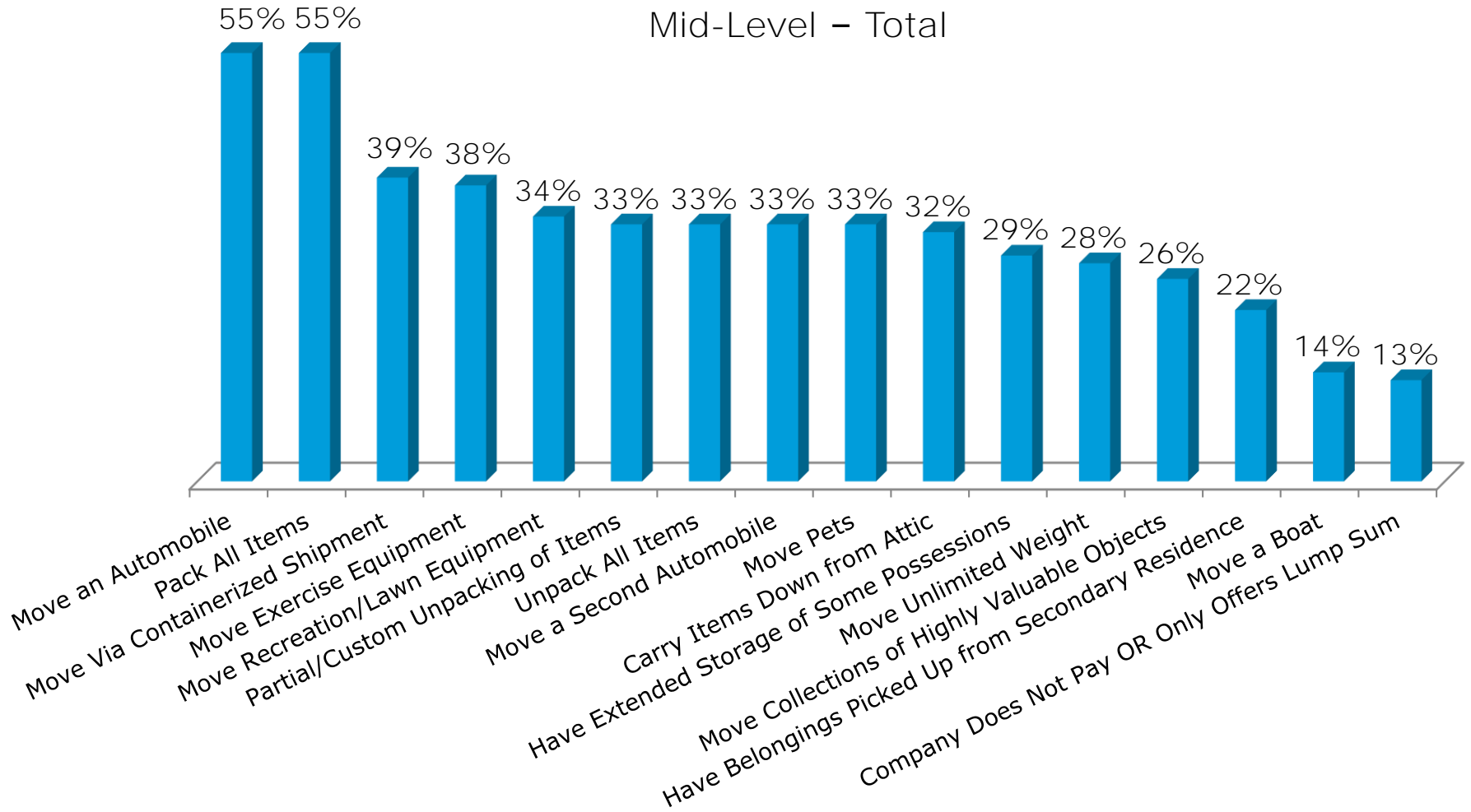
Q.28 – Does Your Company Reimburse/Pay to... (for Transferees OR New Hires)

Entry Level – By Company Size (Salaried Employees)

Covered Relocation Expenses – Entry Level	Total	Less than 500	500-4999	5000+
Company Does Not Pay OR Only Offers Lump Sum	20%	26%	18%	13%
Pack All Items	33%	25%	35%	41%
Move an Automobile	32%	30%	28%	39%
Move Via Containerized Shipment	24%	19%	21%	32%
Move Exercise Equipment	24%	21%	23%	27%
Unpack All Items	22%	19%	20%	27%
Move Pets	21%	19%	21%	23%
Move Recreation and Lawn Equipment	21%	15%	23%	24%
Partial/Custom Unpacking of Items	20%	18%	23%	18%
Carry Items Down from Attic	19%	17%	21%	20%
Move Collections of Highly Valuable Objects	18%	15%	15%	23%
Have Extended Storage of Some Possessions	17%	13%	21%	19%
Move a Second Automobile	17%	15%	14%	22%
Move Unlimited Weight	17%	13%	17%	21%
Have Belongings Picked Up from a Secondary Residence (summer home, relative's home, etc.)	13%	14%	13%	14%
Move a Boat	9%	10%	6%	13%

# Relocation Costs

Q.28 – Does Your Company Reimburse/Pay to... (for Transferees OR New Hires)



# Relocation Costs

Q.28 – Does Your Company Reimburse/Pay to... (for Transferees OR New Hires)

Mid-Level – By Company Size (Salaried Employees)

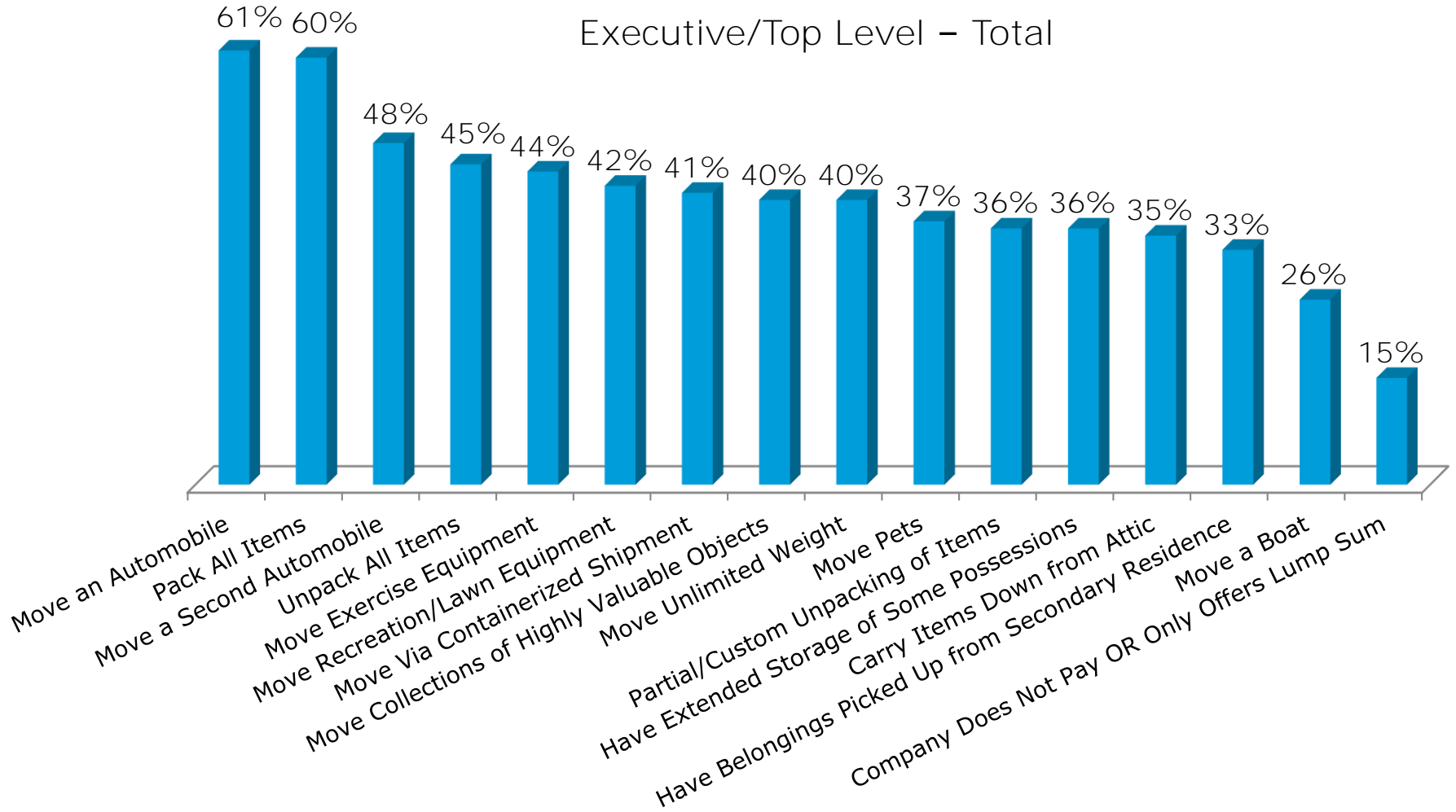
Covered Relocation Expenses – Mid-Level	Total	Less than 500	500-4999	5000+
Company Does Not Pay OR Only Offers Lump Sum	13%	19%	12%	7%
Move an Automobile	55%	46%	52%	70%
Pack All Items	55%	42%	48%	76%
Move Via Containerized Shipment	39%	37%	34%	46%
Move Exercise Equipment	38%	37%	35%	41%
Move Recreation and Lawn Equipment	34%	29%	32%	43%
Partial/Custom Unpacking of Items	33%	28%	37%	36%
Unpack All Items	33%	29%	27%	44%
Move a Second Automobile	33%	30%	26%	43%
Move Pets	33%	33%	32%	33%
Carry Items Down from Attic	32%	28%	34%	35%
Have Extended Storage of Some Possessions	29%	26%	31%	28%
Move Unlimited Weight	28%	21%	27%	37%
Move Collections of Highly Valuable Objects	26%	21%	23%	33%
Have Belongings Picked Up from a Secondary Residence (summer home, relative's home, etc.)	22%	22%	24%	21%
Move a Boat	14%	15%	11%	16%



# Relocation Costs

Q.28 – Does Your Company Reimburse/Pay to... (for Transferees OR New Hires)

Executive/Top Level – Total



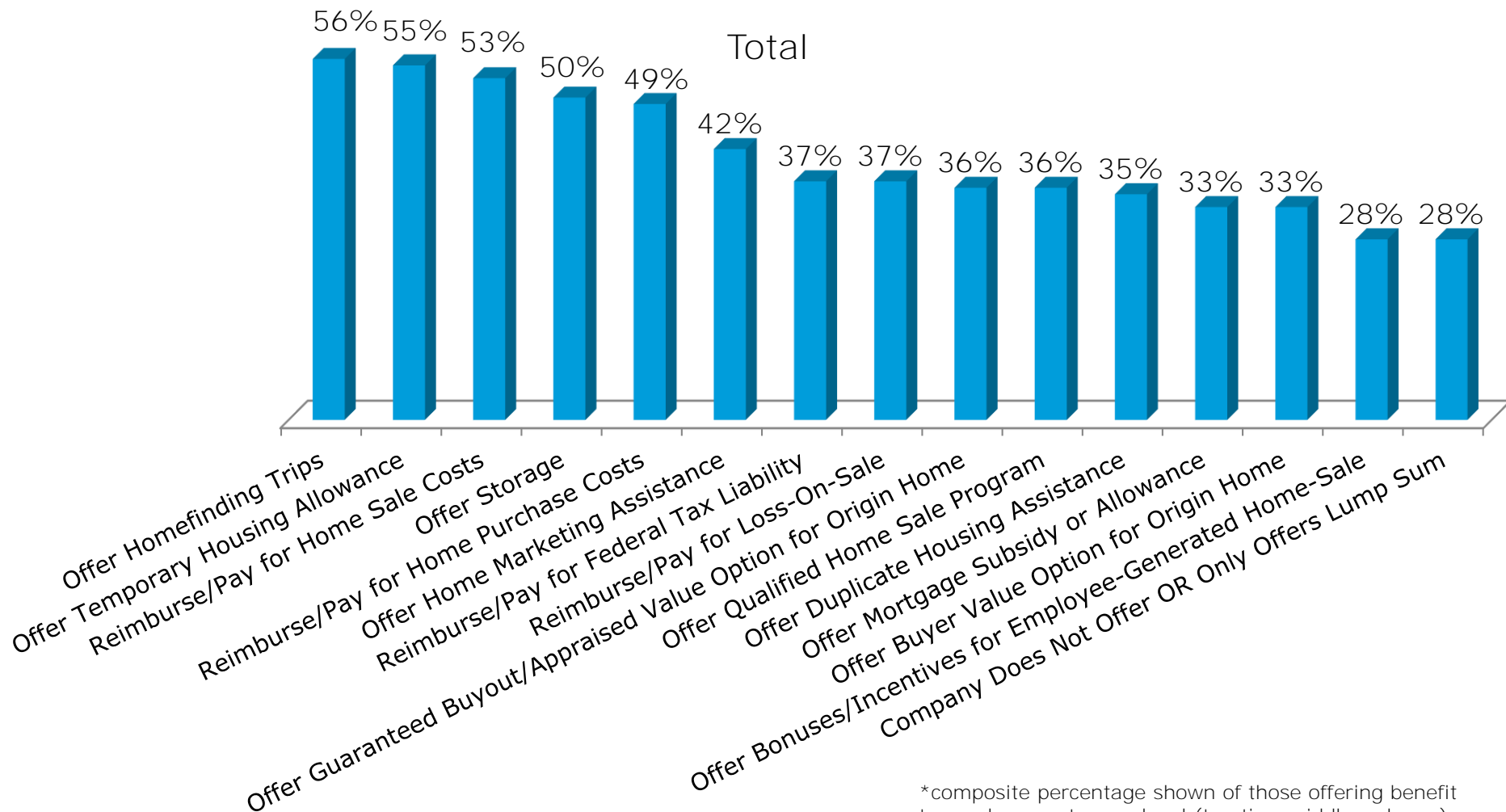
# Relocation Costs

Q.28 – Does Your Company Reimburse/Pay to... (for Transferees OR New Hires)  
Executive/Top Level – By Company Size (Salaried Employees)

Covered Relocation Expenses – Exec/Top Level	Total	Less than 500	500-4999	5000+
Company Does Not Pay OR Only Offers Lump Sum	15%	25%	15%	4%
Move an Automobile	61%	50%	57%	77%
Pack All Items	60%	45%	55%	82%
Move a Second Automobile	48%	41%	43%	63%
Unpack All Items	45%	35%	41%	62%
Move Exercise Equipment	44%	37%	45%	50%
Move Recreation and Lawn Equipment	42%	37%	40%	49%
Move Via Containerized Shipment	41%	36%	41%	47%
Move Collections of Highly Valuable Objects	40%	34%	38%	50%
Move Unlimited Weight	40%	30%	42%	50%
Move Pets	37%	33%	41%	38%
Partial/Custom Unpacking of Items	36%	27%	39%	44%
Have Extended Storage of Some Possessions	36%	31%	34%	43%
Carry Items Down from Attic	35%	28%	34%	45%
Have Belongings Picked Up from a Secondary Residence (summer home, relative's home, etc.)	33%	32%	34%	33%
Move a Boat	26%	25%	25%	27%

# Relocation Costs

Q.29 – When a Relocating Employee (Transferee OR New Hire) is a Homeowner Who Will Be Buying (Not Renting), Does Your Company...\*



\*composite percentage shown of those offering benefit to employees at some level (top tier, middle or lower)



# Relocation Costs

Q.29 – When a Relocating Employee (Transferee OR New Hire) is a Homeowner Who Will Be Buying (Not Renting), Does Your Company...\*

By Company Size (Salaried Employees)

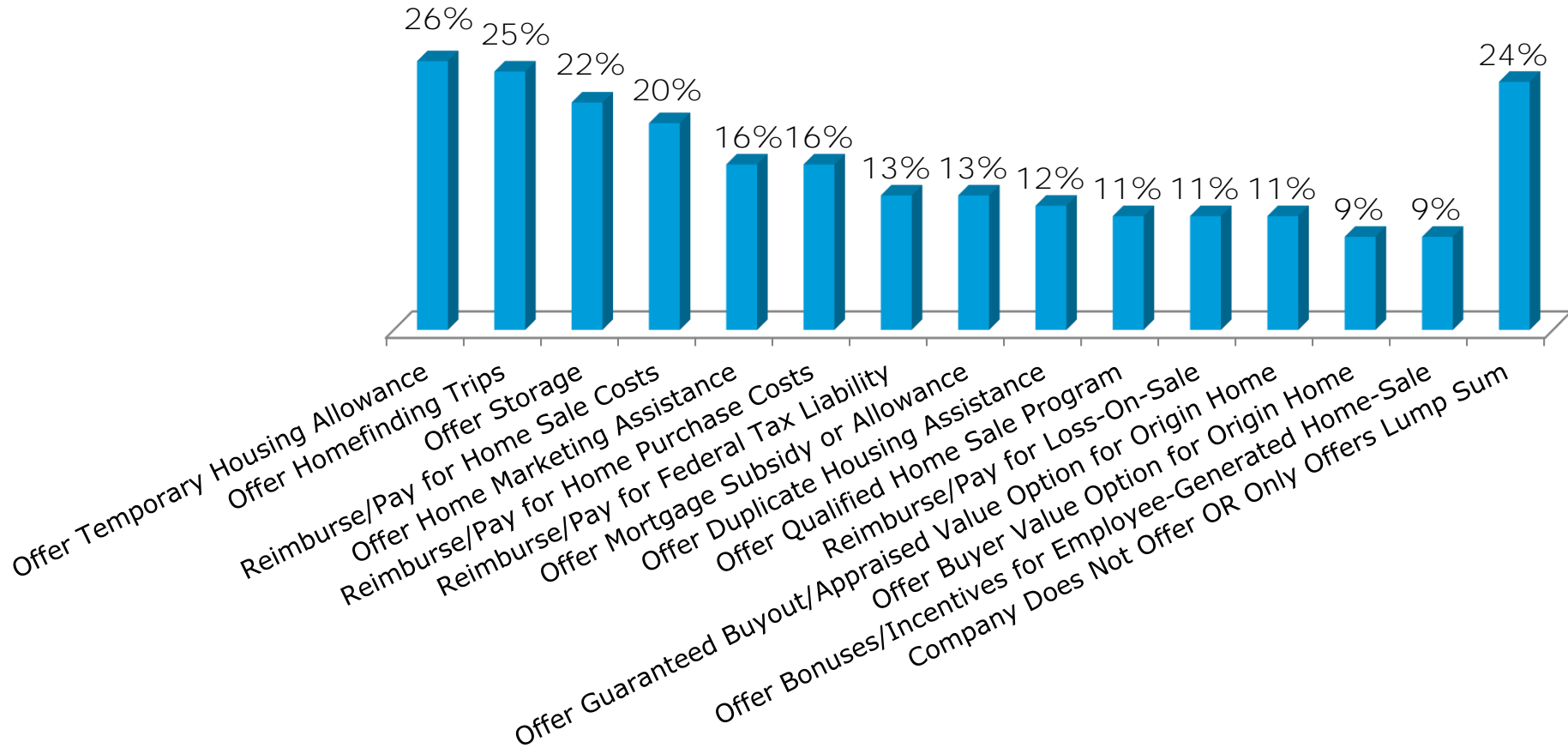
Covered Relocation Expenses: Employee Buying	Total	Less than 500	500-4999	5000+
Company Does Not Offer OR Only Offers Lump Sum	28%	41%	24%	19%
Offer Homefinding Trips	56%	52%	51%	67%
Offer Temporary Housing Allowance	55%	48%	52%	66%
Reimburse/Pay for Home Sale Costs	53%	39%	53%	69%
Offer Storage	50%	41%	48%	63%
Reimburse/Pay for Home Purchase Costs	49%	36%	48%	63%
Offer Home Marketing Assistance	42%	27%	45%	57%
Reimburse/Pay for Federal Tax Liability	37%	27%	41%	44%
Reimburse/Pay for Loss-On-Sale	37%	26%	39%	46%
Offer Guaranteed Buyout Option/Appraised Value Option for Origin Home	36%	27%	35%	47%
Offer Qualified Home Sale Program	36%	25%	35%	48%
Offer Duplicate Housing Assistance	35%	31%	34%	40%
Offer Mortgage Subsidy or Allowance	33%	32%	35%	33%
Offer Buyer Value Option for Origin Home	33%	26%	31%	43%
Offer Bonuses/Incentives for Employee-Generated Home-Sale	28%	19%	28%	39%

\*composite percentage shown of those offering benefit to employees at some level (top tier, middle or lower)

# Relocation Costs

Q.29 – When a Relocating Employee (Transferee OR New Hire) is a Homeowner Who Will Be Buying (Not Renting), Does Your Company...

Entry Level – Total



# Relocation Costs

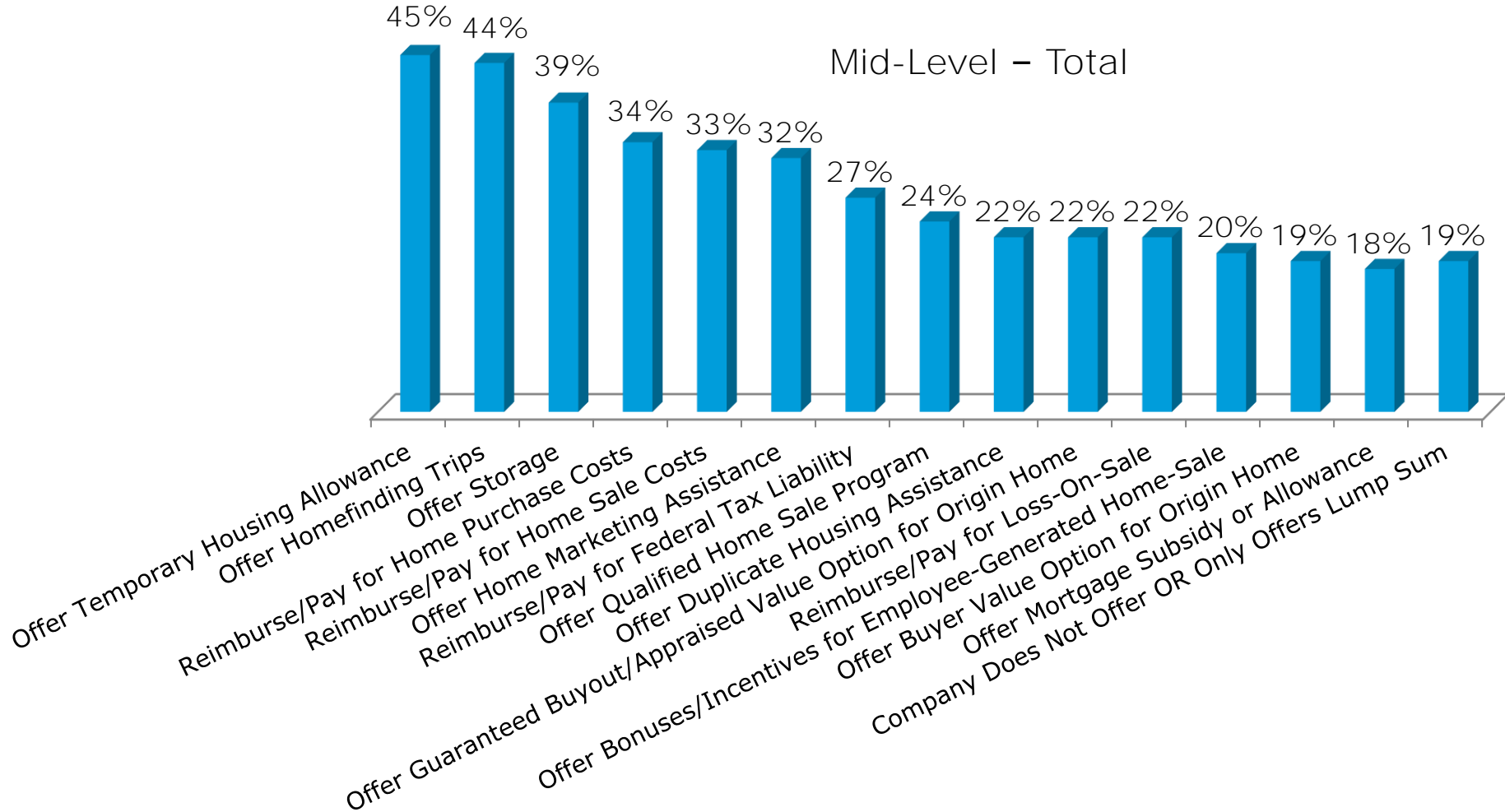
Q.29 – When a Relocating Employee (Transferee OR New Hire) is a Homeowner Who Will Be Buying (Not Renting), Does Your Company...\*

Entry Level – By Company Size (Salaried Employees)

Covered Relocation Expenses: Employee Buying – Entry Level	Total	Less than 500	500-4999	5000+
Company Does Not Offer OR Only Offers Lump Sum	24%	34%	21%	17%
Offer Temporary Housing Allowance	26%	19%	28%	32%
Offer Homefinding Trips	25%	25%	21%	29%
Offer Storage	22%	15%	24%	30%
Reimburse/Pay for Home Sale Costs	20%	17%	21%	21%
Offer Home Marketing Assistance	16%	10%	16%	24%
Reimburse/Pay for Home Purchase Costs	16%	11%	17%	20%
Reimburse/Pay for Federal Tax Liability	13%	10%	15%	15%
Offer Mortgage Subsidy or Allowance	13%	10%	14%	13%
Offer Duplicate Housing Assistance	12%	9%	11%	16%
Offer Qualified Home Sale Program	11%	9%	12%	14%
Reimburse/Pay for Loss-On-Sale	11%	11%	14%	9%
Offer Guaranteed Buyout Option/Appraised Value Option for Origin Home	11%	8%	12%	12%
Offer Buyer Value Option for Origin Home	9%	6%	12%	10%
Offer Bonuses/Incentives for Employee-Generated Home-Sale	9%	6%	8%	12%

# Relocation Costs

Q.29 – When a Relocating Employee (Transferee OR New Hire) is a Homeowner Who Will Be Buying (Not Renting), Does Your Company...



# Relocation Costs

Q.29 – When a Relocating Employee (Transferee OR New Hire) is a Homeowner Who Will Be Buying (Not Renting), Does Your Company...\*

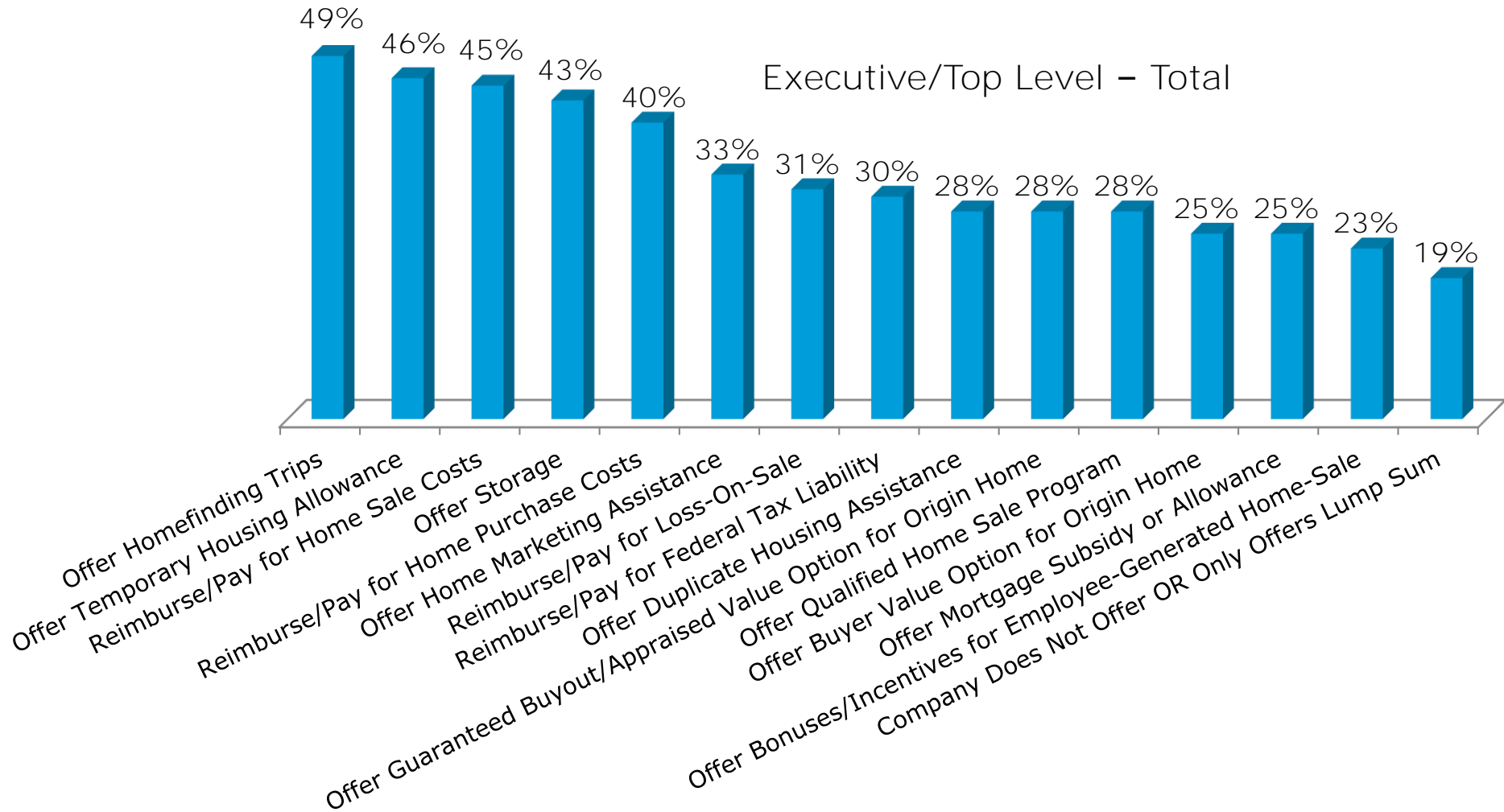
Mid-Level – By Company Size (Salaried Employees)

Covered Relocation Expenses: Employee Buying – Mid-Level	Total	Less than 500	500-4999	5000+
Company Does Not Offer OR Only Offers Lump Sum	19%	30%	15%	10%
Offer Temporary Housing Allowance	45%	36%	42%	58%
Offer Homefinding Trips	44%	36%	39%	59%
Offer Storage	39%	28%	37%	53%
Reimburse/Pay for Home Purchase Costs	34%	23%	33%	47%
Reimburse/Pay for Home Sale Costs	33%	22%	30%	51%
Offer Home Marketing Assistance	32%	15%	36%	47%
Reimburse/Pay for Federal Tax Liability	27%	19%	27%	35%
Offer Qualified Home Sale Program	24%	14%	23%	38%
Offer Duplicate Housing Assistance	22%	19%	19%	29%
Offer Guaranteed Buyout Option/Appraised Value Option for Origin Home	22%	12%	23%	32%
Reimburse/Pay for Loss-On-Sale	22%	14%	24%	27%
Offer Bonuses/Incentives for Employee-Generated Home-Sale	20%	10%	19%	33%
Offer Buyer Value Option for Origin Home	19%	10%	19%	29%
Offer Mortgage Subsidy or Allowance	18%	15%	17%	21%



# Relocation Costs

Q.29 – When a Relocating Employee (Transferee OR New Hire) is a Homeowner Who Will Be Buying (Not Renting), Does Your Company...



# Relocation Costs

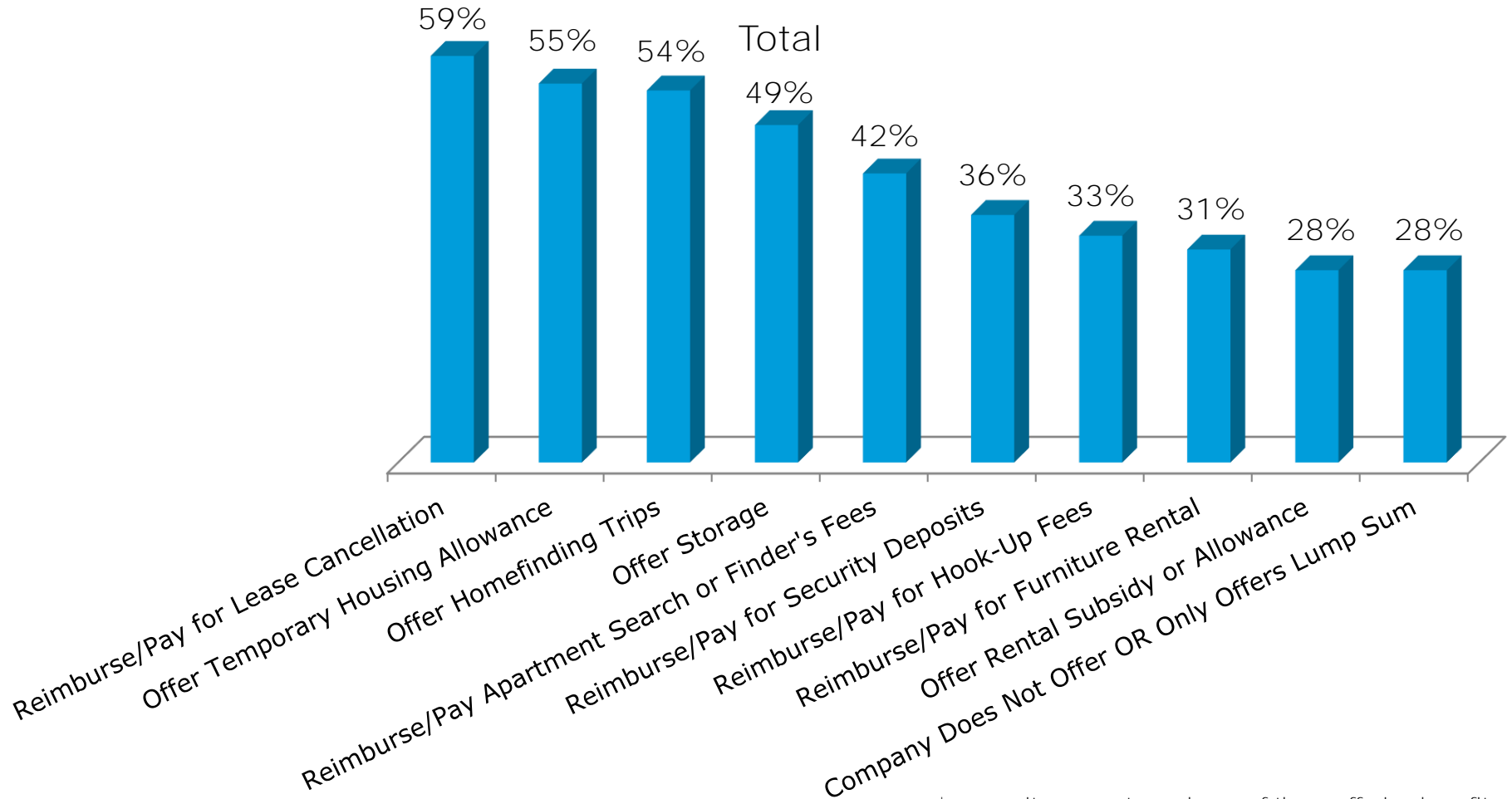
Q.29 – When a Relocating Employee (Transferee OR New Hire) is a Homeowner Who Will Be Buying (Not Renting), Does Your Company...\*

Executive/Top Level – By Company Size (Salaried Employees)

Covered Relocation Expenses: Employee Buying – Exec/Top Level	Total	Less than 500	500-4999	5000+
Company Does Not Offer OR Only Offers Lump Sum	19%	30%	17%	9%
Offer Homefinding Trips	49%	45%	46%	59%
Offer Temporary Housing Allowance	46%	38%	43%	59%
Reimburse/Pay for Home Sale Costs	45%	30%	45%	63%
Offer Storage	43%	34%	38%	58%
Reimburse/Pay for Home Purchase Costs	40%	26%	39%	56%
Offer Home Marketing Assistance	33%	20%	32%	51%
Reimburse/Pay for Loss-On-Sale	31%	21%	32%	40%
Reimburse/Pay for Federal Tax Liability	30%	19%	34%	36%
Offer Duplicate Housing Assistance	28%	25%	27%	33%
Offer Guaranteed Buyout Option/Appraised Value Option for Origin Home	28%	21%	26%	39%
Offer Qualified Home Sale Program	28%	18%	24%	43%
Offer Buyer Value Option for Origin Home	25%	19%	23%	34%
Offer Mortgage Subsidy or Allowance	25%	24%	24%	27%
Offer Bonuses/Incentives for Employee-Generated Home-Sale	23%	14%	23%	34%

# Relocation Costs

Q.30 – When a Relocating Employee (Transferee OR New Hire) Will Be Renting (Not Buying), Does Your Company...\*



\*composite percentage shown of those offering benefit to employees at some level (top tier, middle or lower)



# Relocation Costs

*Q.30 – When a Relocating Employee (Transferee OR New Hire) Will Be Renting (Not Buying), Does Your Company...\**

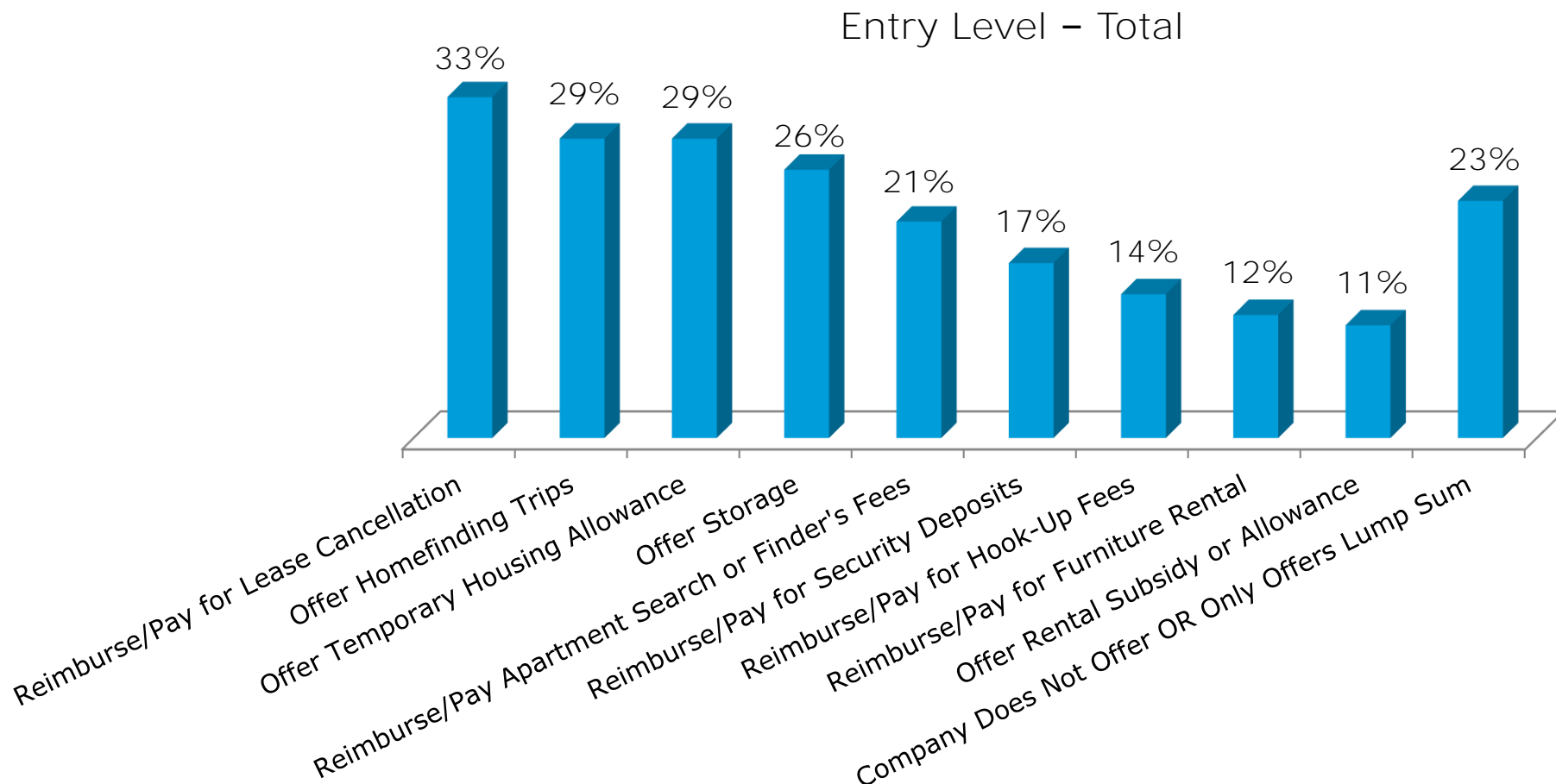
By Company Size (Salaried Employees)

Covered Relocation Expenses: Employee Renting	Total	Less than 500	500-4999	5000+
Company Does Not Offer OR Only Offers Lump Sum	28%	39%	26%	18%
Reimburse/Pay for Lease Cancellation	59%	49%	54%	76%
Offer Temporary Housing Allowance	55%	46%	52%	68%
Offer Homefinding Trips	54%	46%	50%	67%
Offer Storage	49%	39%	48%	61%
Reimburse/Pay Apartment Search or Finder's Fees	42%	32%	42%	54%
Reimburse/Pay for Security Deposits	36%	34%	41%	31%
Reimburse/Pay for Hook-Up Fees	33%	32%	38%	28%
Reimburse/Pay for Furniture Rental	31%	30%	30%	33%
Offer Rental Subsidy or Allowance	28%	26%	30%	27%

\*composite percentage shown of those offering benefit to employees at some level (top tier, middle or lower)

# Relocation Costs

Q.30 – When a Relocating Employee (Transferee OR New Hire) Will Be Renting (Not Buying), Does Your Company...



# Relocation Costs

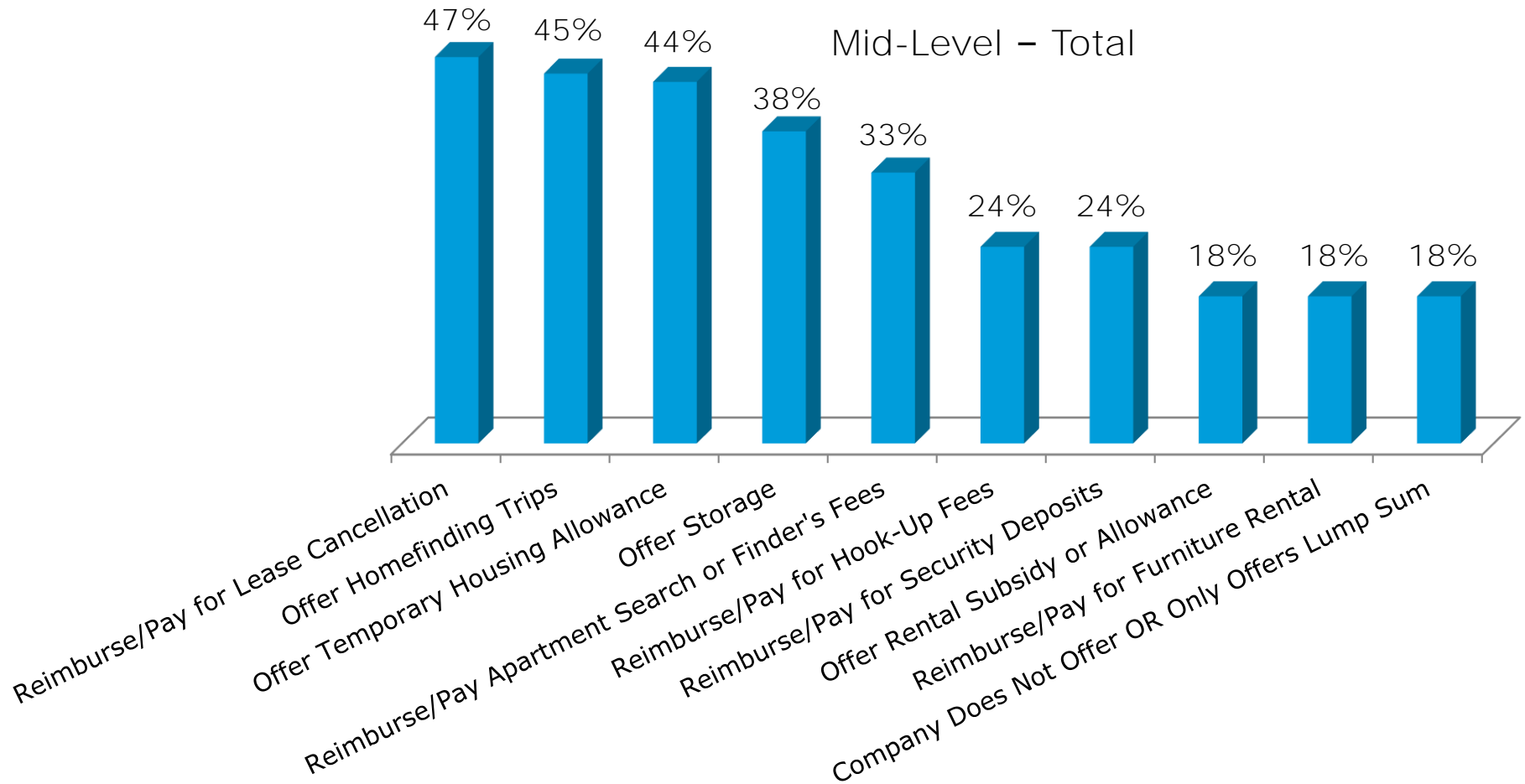
*Q.30 – When a Relocating Employee (Transferee OR New Hire) Will Be Renting (Not Buying), Does Your Company...*

Entry Level – By Company Size (Salaried Employees)

Covered Relocation Expenses: Employee Renting – Entry Level	Total	Less than 500	500-4999	5000+
Company Does Not Offer OR Only Offers Lump Sum	23%	32%	21%	16%
Reimburse/Pay for Lease Cancellation	33%	24%	33%	42%
Offer Homefinding Trips	29%	26%	28%	34%
Offer Temporary Housing Allowance	29%	23%	29%	36%
Offer Storage	26%	20%	30%	30%
Reimburse/Pay Apartment Search or Finder’s Fees	21%	16%	21%	27%
Reimburse/Pay for Security Deposits	17%	17%	19%	16%
Reimburse/Pay for Hook-Up Fees	14%	15%	16%	10%
Reimburse/Pay for Furniture Rental	12%	10%	14%	13%
Offer Rental Subsidy or Allowance	11%	10%	13%	10%

# Relocation Costs

Q.30 – When a Relocating Employee (Transferee OR New Hire) Will Be Renting (Not Buying), Does Your Company...



# Relocation Costs

*Q.30 – When a Relocating Employee (Transferee OR New Hire) Will Be Renting (Not Buying), Does Your Company...*

Mid-Level – By Company Size (Salaried Employees)

<b>Covered Relocation Expenses: Employee Renting – Mid-Level</b>	<b>Total</b>	<b>Less than 500</b>	<b>500-4999</b>	<b>5000+</b>
Company Does Not Offer OR Only Offers Lump Sum	18%	28%	16%	9%
Reimburse/Pay for Lease Cancellation	47%	39%	44%	61%
Offer Homefinding Trips	45%	38%	41%	57%
Offer Temporary Housing Allowance	44%	34%	43%	55%
Offer Storage	38%	30%	36%	50%
Reimburse/Pay Apartment Search or Finder's Fees	33%	25%	31%	44%
Reimburse/Pay for Hook-Up Fees	24%	26%	25%	21%
Reimburse/Pay for Security Deposits	24%	25%	26%	19%
Offer Rental Subsidy or Allowance	18%	14%	21%	21%
Reimburse/Pay for Furniture Rental	18%	21%	15%	17%



# Relocation Costs

Q.30 – When a Relocating Employee (Transferee OR New Hire) Will Be Renting (Not Buying), Does Your Company...



# Relocation Costs

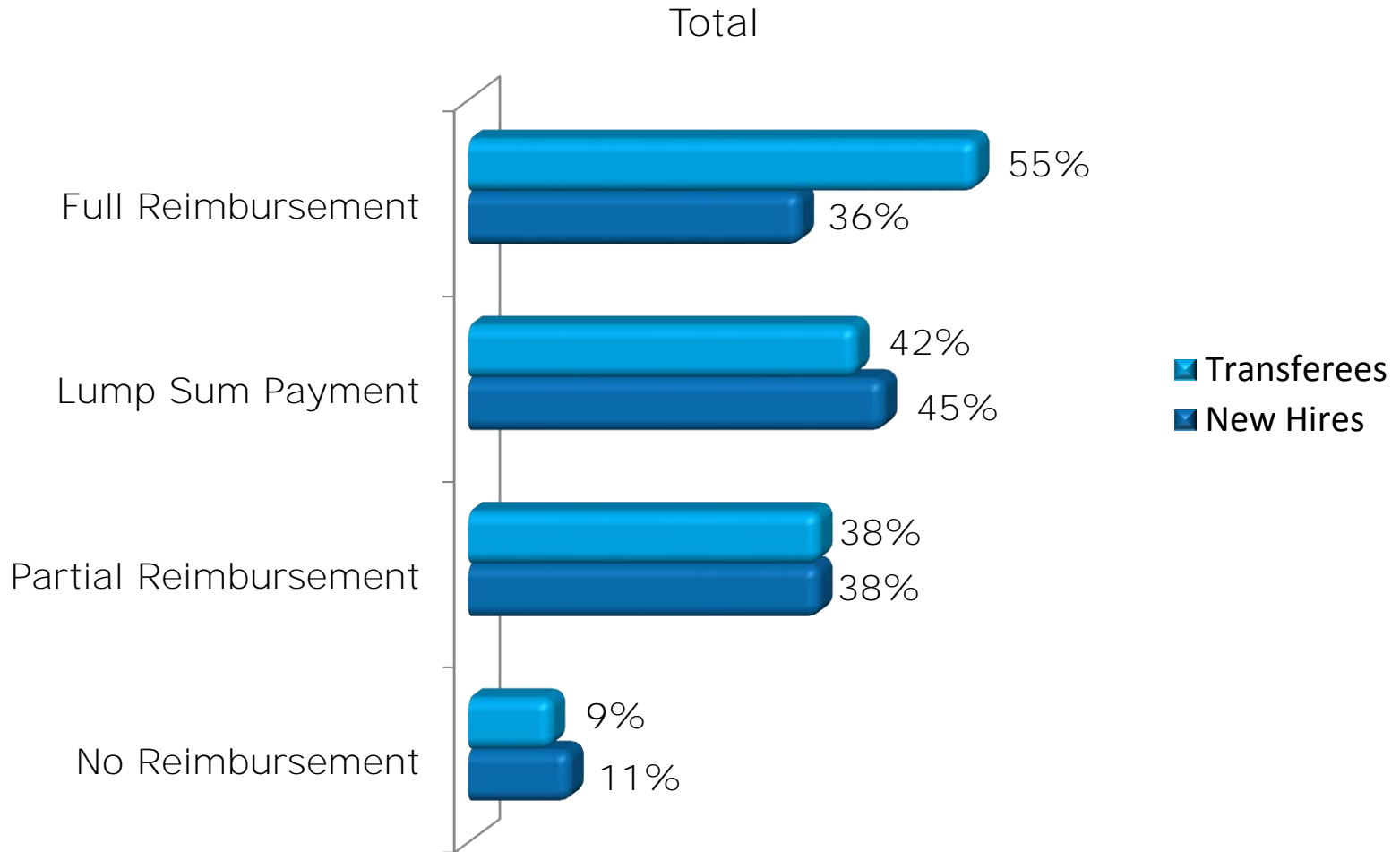
*Q.30 – When a Relocating Employee (Transferee OR New Hire) Will Be Renting (Not Buying), Does Your Company...*

Executive/Top Level – By Company Size (Salaried Employees)

Covered Relocation Expenses: Employee Renting – Executive/Top Level	Total	Less than 500	500-4999	5000+
Company Does Not Offer OR Only Offers Lump Sum	19%	28%	20%	7%
Reimburse/Pay for Lease Cancellation	51%	39%	48%	67%
Offer Temporary Housing Allowance	50%	40%	49%	64%
Offer Homefinding Trips	48%	39%	42%	64%
Offer Storage	43%	32%	42%	56%
Reimburse/Pay Apartment Search or Finder’s Fees	36%	23%	37%	49%
Reimburse/Pay for Security Deposits	28%	25%	35%	24%
Reimburse/Pay for Hook-Up Fees	24%	24%	28%	20%
Reimburse/Pay for Furniture Rental	24%	22%	21%	30%
Offer Rental Subsidy or Allowance	20%	18%	21%	21%

# Relocation Costs

Q.31 – Extent Company Reimburses Relocation Expenses of Transferees/New Hires



# Relocation Costs

Q.31 – Extent Company Reimburses Relocation Expenses of Transferees/New Hires

By Company Size (Salaried Employees)

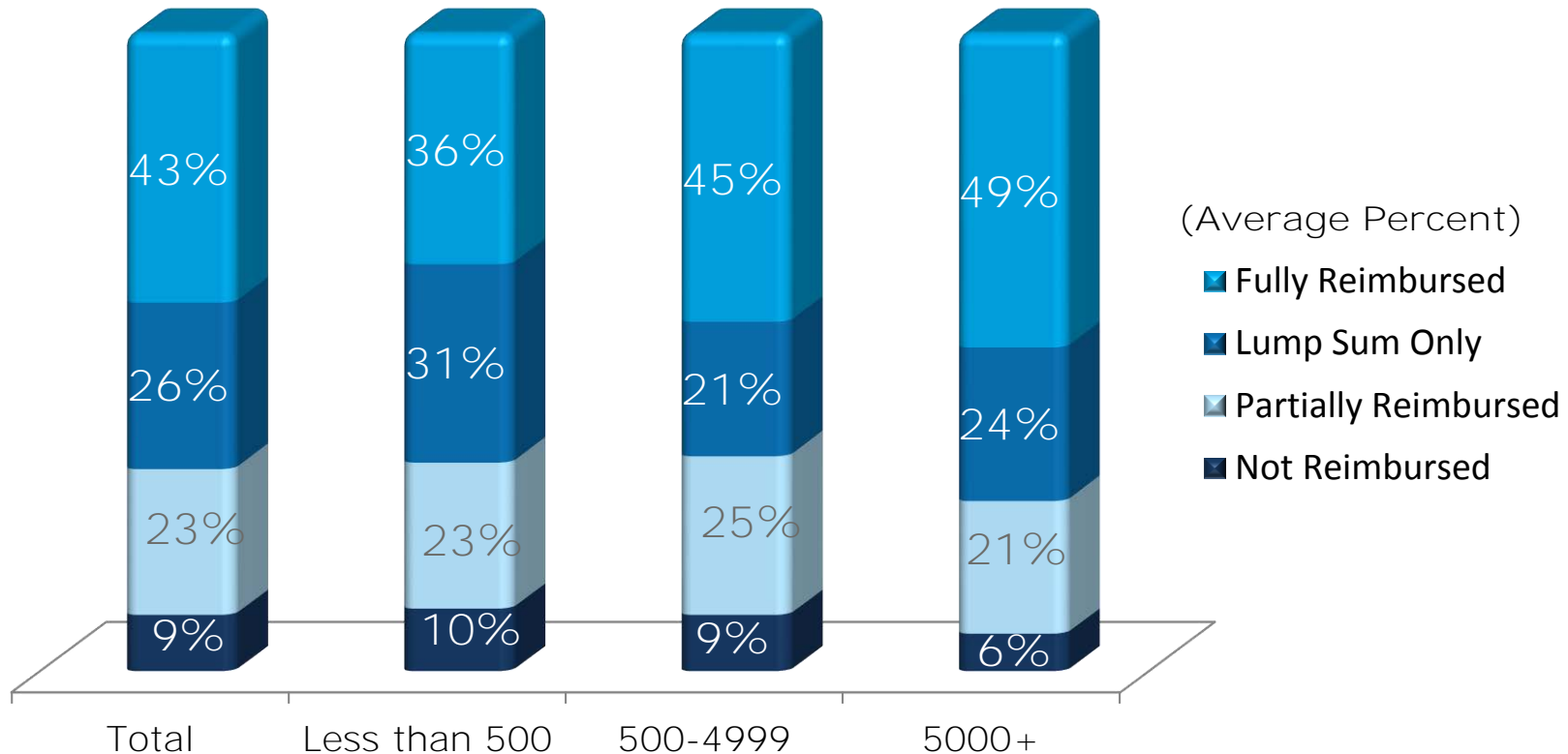
Extent Transferees are Reimbursed	Total	Less than 500	500-4999	5000+
Full Reimbursement of Relocation Expenses	55%	47%	55%	64%
Lump Sum Payment	42%	38%	42%	45%
Partial Reimbursement Based on Salary, Position, Policy Tier, etc.	38%	39%	36%	40%
No Reimbursement of Relocation Expenses	9%	14%	7%	6%

Extent New Hires are Reimbursed	Total	Less than 500	500-4999	5000+
Full Reimbursement of Relocation Expenses	36%	25%	38%	45%
Lump Sum Payment	45%	49%	38%	47%
Partial Reimbursement Based on Salary, Position, Policy Tier, etc.	38%	34%	39%	42%
No Reimbursement of Relocation Expenses	11%	13%	10%	11%

# Relocation Costs

Q.32 – What Approximate Percentage of Your Relocations Were (Payment Type):

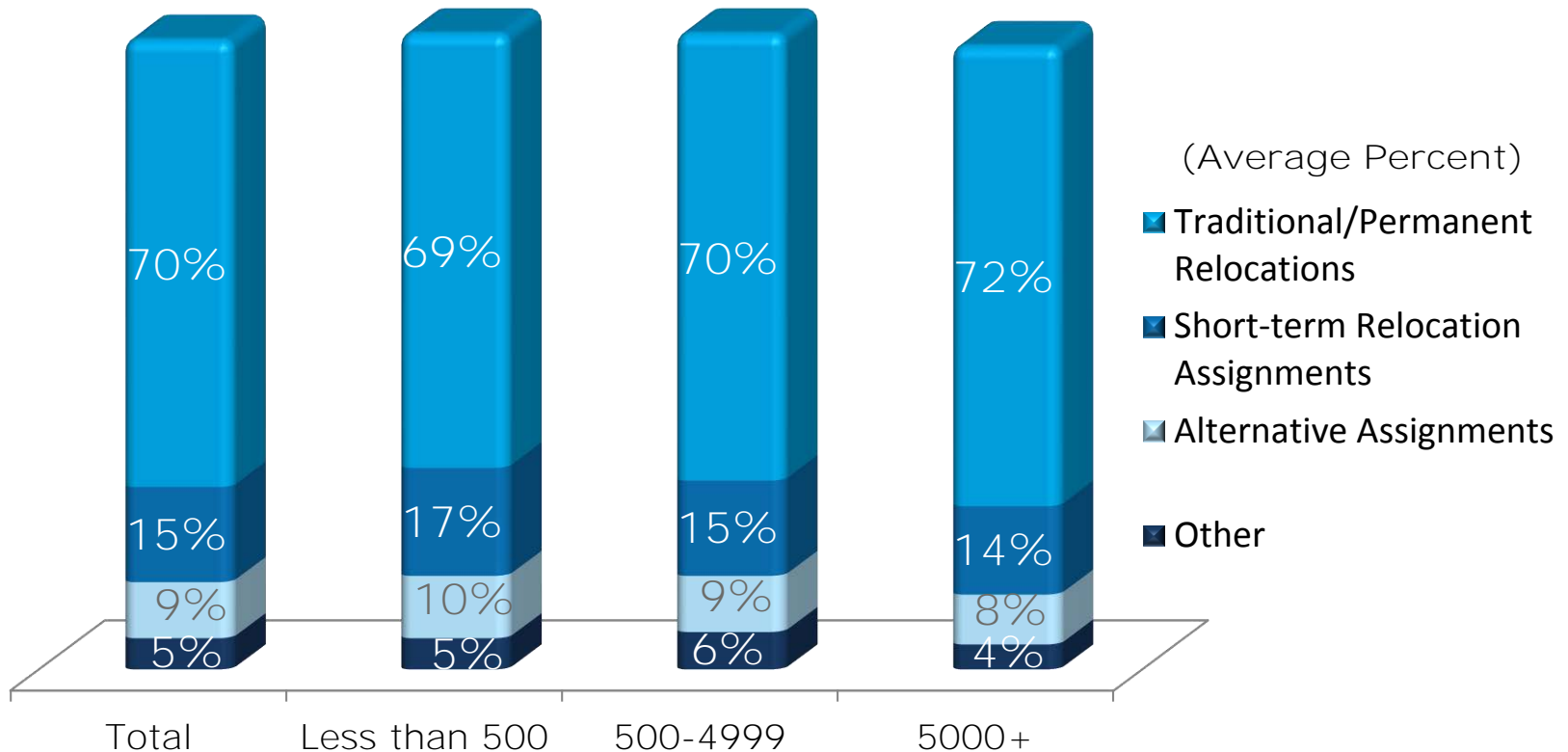
By Company Size (Salaried Employees)



# Relocation Costs

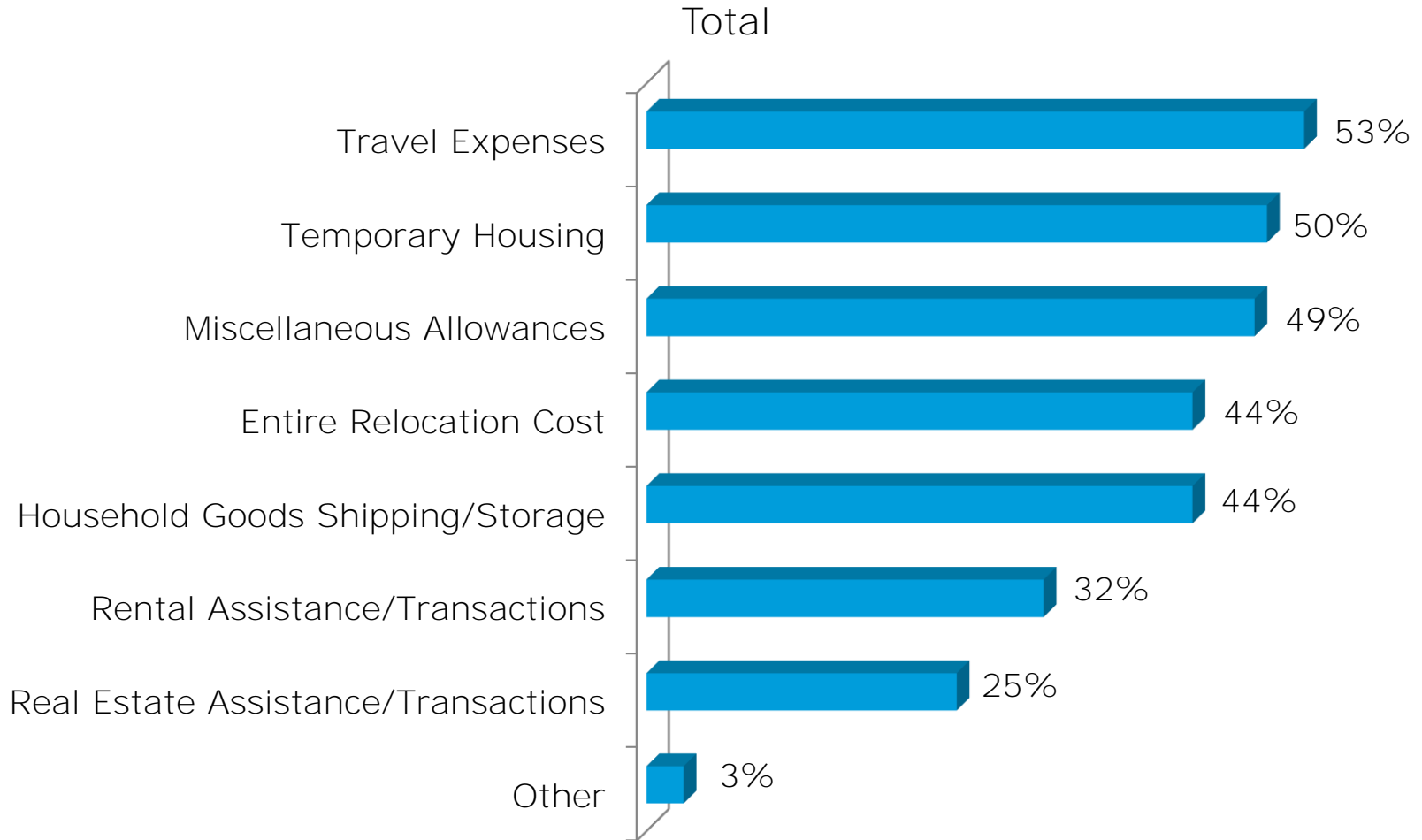
Q.32 – What Approximate Percentage of Your Relocations Were (Category-Domestic Only):

By Company Size (Salaried Employees)



# Relocation Costs

Q.32a – For What Types of Relocation Costs are Lump Sum Payments Typically Offered to Relocating Employees (Transferees OR New Hires)?\*



\* of those offering lump sum payments (Q31)

# Relocation Costs

*Q.32a – For What Types of Relocation Costs are Lump Sum Payments Typically Offered to Relocating Employees (Transferees OR New Hires)?\**

By Company Size (Salaried Employees)

Expenses for Which Lump Sum Typically Offered	Total	Less than 500	500-4999	5000+
Travel Expenses (i.e. housing hunting trips, final move, etc.)	53%	56%	53%	51%
Temporary Housing	50%	48%	50%	52%
Miscellaneous Allowances	49%	49%	38%	59%
Entire Relocation Cost	44%	43%	46%	44%
Household Goods Shipping/Storage	44%	45%	51%	34%
Rental Assistance/Transactions	32%	34%	31%	29%
Real Estate Assistance/Transactions	25%	28%	22%	23%
Other	3%	3%	4%	3%

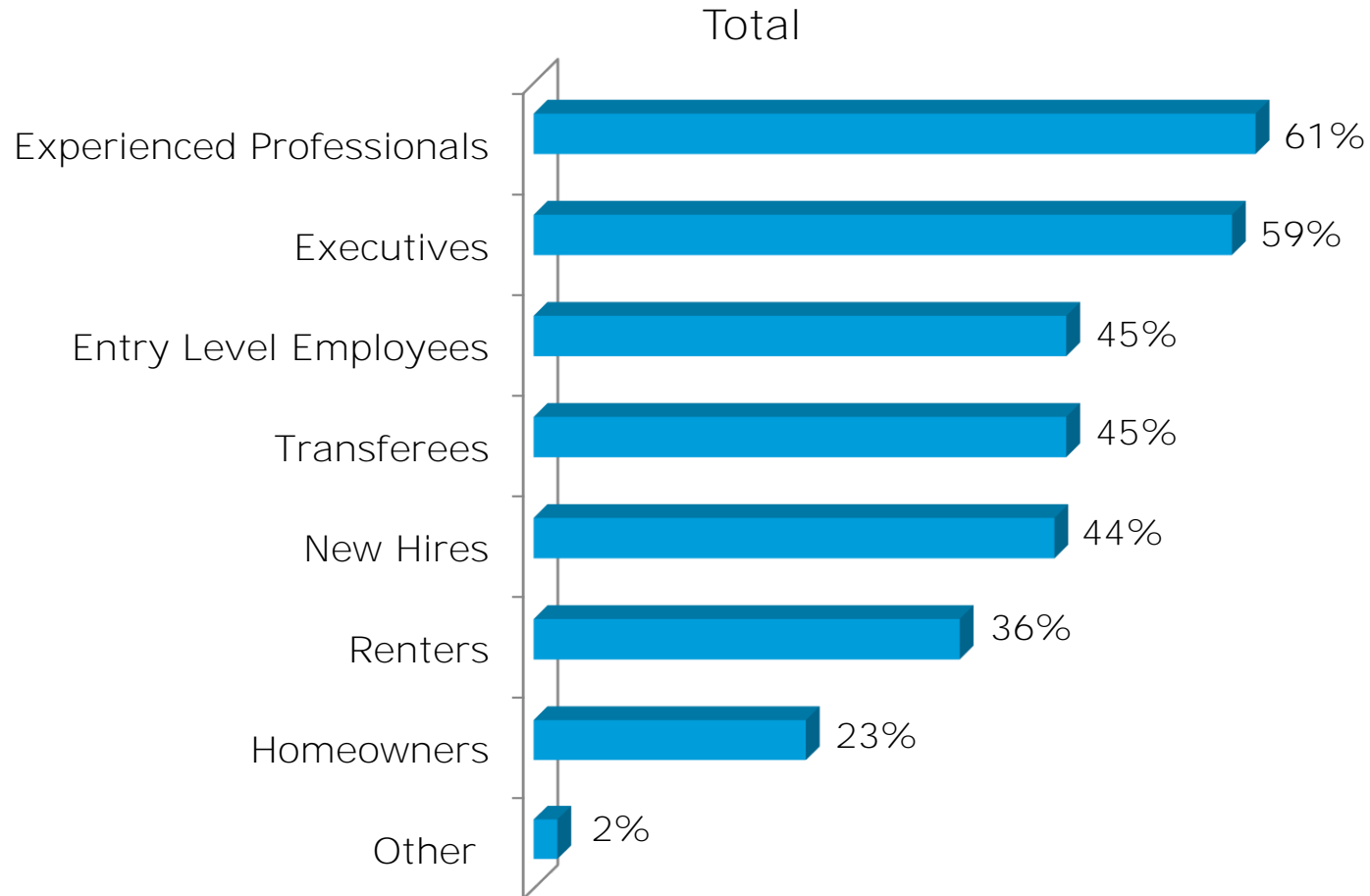
\* of those offering lump sum payments (Q31)





# Relocation Costs

Q.32b-1 – What Types of Relocating Employees Most Commonly Receive Lump Sum Payments?\*



\* of those offering lump sum payments (Q31)

# Relocation Costs

*Q.32b-1 – What Types of Relocating Employees Most Commonly Receive Lump Sum Payments?\**

By Company Size (Salaried Employees)

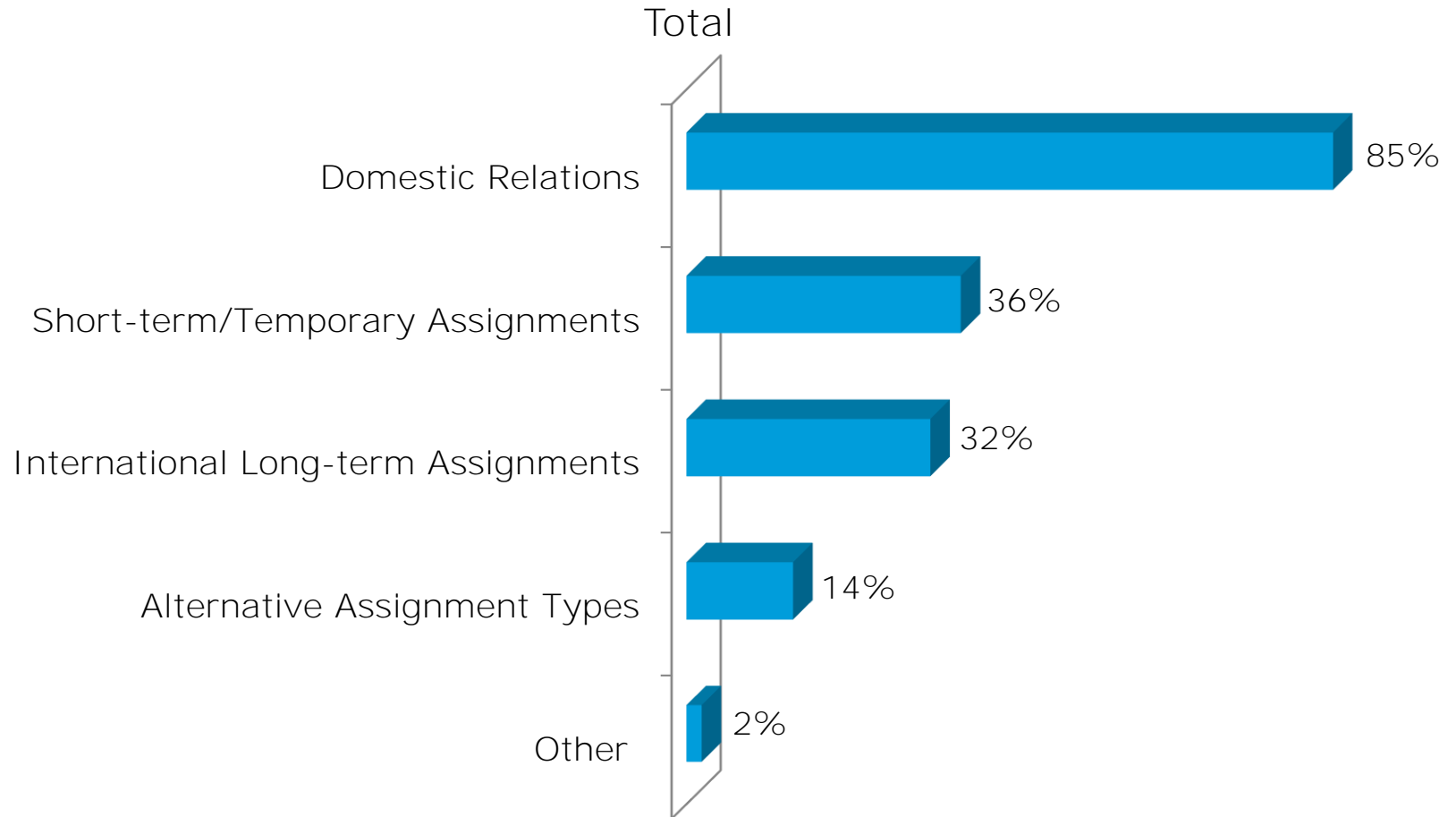
Employees Most Commonly Receiving Lump Sums	Total	Less than 500	500-4999	5000+
Experienced Professionals	61%	57%	74%	52%
Executives	59%	48%	67%	63%
Entry Level Employees	45%	44%	29%	63%
Transferees	45%	43%	40%	52%
New Hires	44%	39%	40%	56%
Renters	36%	37%	31%	42%
Homeowners	23%	20%	18%	33%
Other	2%	1%	1%	4%

\* of those offering lump sum payments (Q31)



# Relocation Costs

Q.32b-2 – What Types of Relocations Most Commonly Receive Lump Sum Payments?\*



\* of those offering lump sum payments (Q31)

# Relocation Costs

Q.32b-2 – What Types of Relocations Most Commonly Receive Lump Sum Payments?\*

By Company Size (Salaried Employees)

Relocations Most Commonly Receiving Lump Sums	Total	Less than 500	500-4999	5000+
Domestic Relocations	85%	85%	77%	93%
Short-term/Temporary Assignments	36%	29%	40%	40%
International Long-term Assignments	32%	26%	35%	38%
Alternative Assignment Types (i.e. commuters, EBTs, etc.)	14%	11%	17%	16%
Other	2%	2%	3%	0%

\* of those offering lump sum payments (Q31)



# Relocation Costs

*Q.32c – For the Applicable Cost Types Below, What are the Typical Ranges of Lump Sums Offered?\**

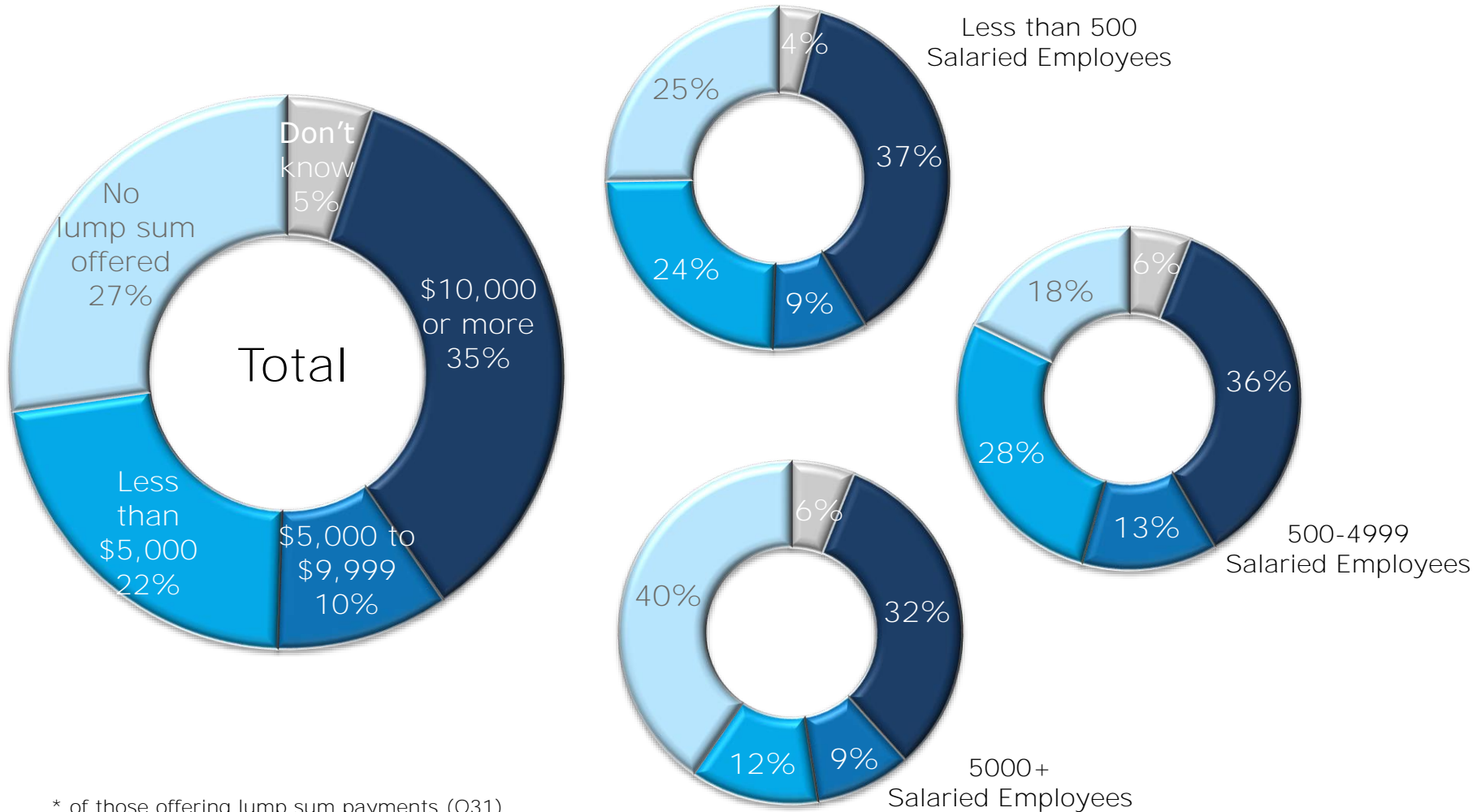
By Company Size (Salaried Employees)

Median Amounts Shown	Total	Less than 500	500-4999	5000+
Real Estate Assistance/ Transactions	\$5,000-\$9,999	\$5,000-\$9,999	\$5,000-\$9,999	\$1,000-\$4,999
Household Goods Shipping/ Storage	\$5,000-\$9,999	\$5,000-\$9,999	\$5,000-\$9,999	\$1,000-\$4,999
Entire Relocation Cost	\$10,000-\$14,999	\$10,000-\$14,999	\$15,000-\$19,999	\$10,000-\$14,999
Rental Assistance/ Transactions	\$1,000-\$2,499	\$1,000-\$2,499	\$2,500-\$4,999	\$1,000-\$2,499
Travel Expenses	\$1,000-\$2,499	\$1,000-\$2,499	\$2,500-\$4,999	\$1,000-\$2,499
Temporary Housing	\$2,500-\$4,999	\$2,500-\$4,999	\$2,500-\$4,999	\$2,500-\$4,999
Miscellaneous Allowances	\$1,000-\$2,499	\$1,000-\$2,499	\$2,500-\$4,999	\$2,500-\$4,999

\* of those offering lump sum payments (Q31)

# Relocation Costs

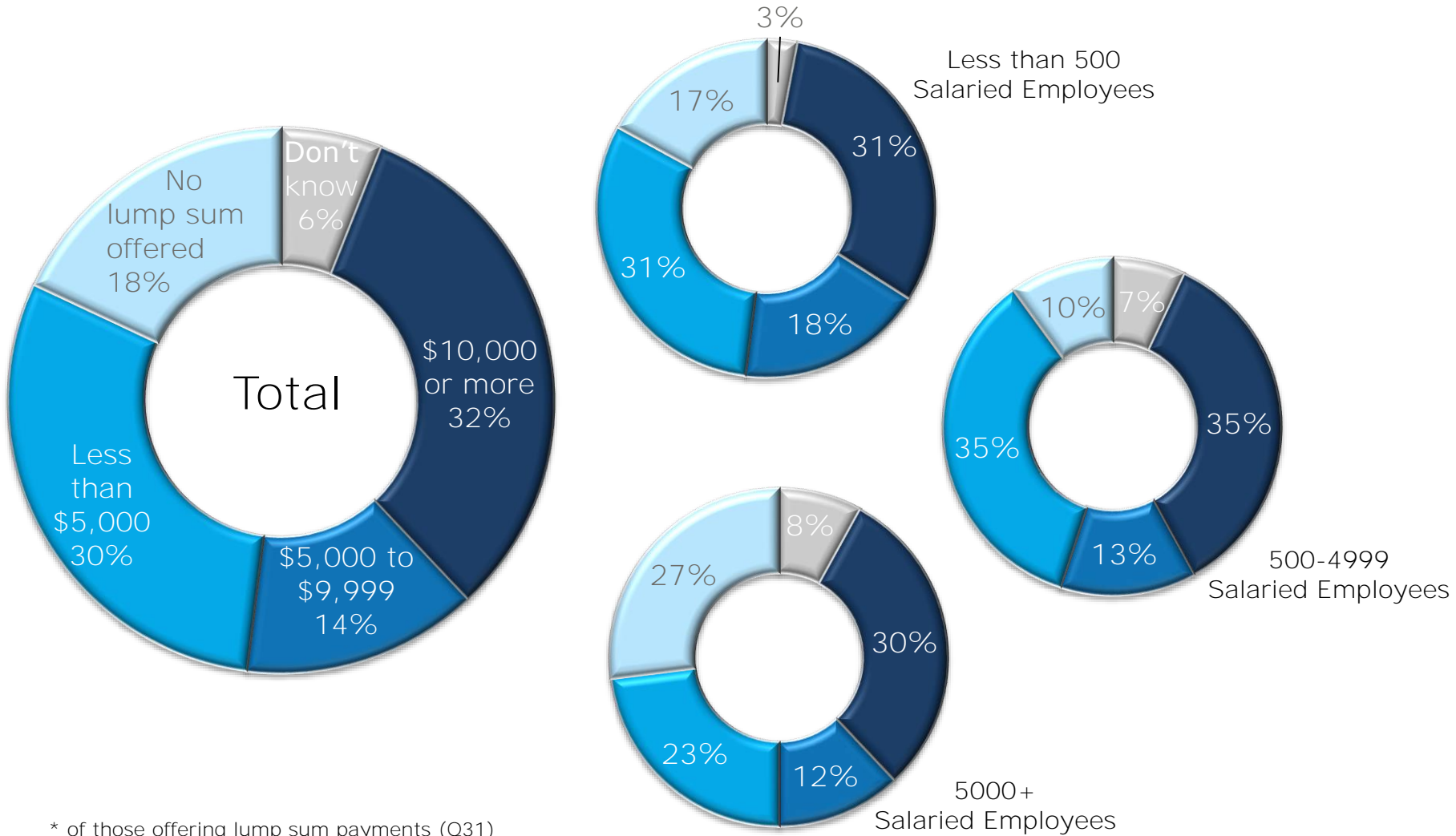
Q. 32c – Typical Range for Lump Sum Payments – Real Estate Assistance/Transactions\*



\* of those offering lump sum payments (Q31)

# Relocation Costs

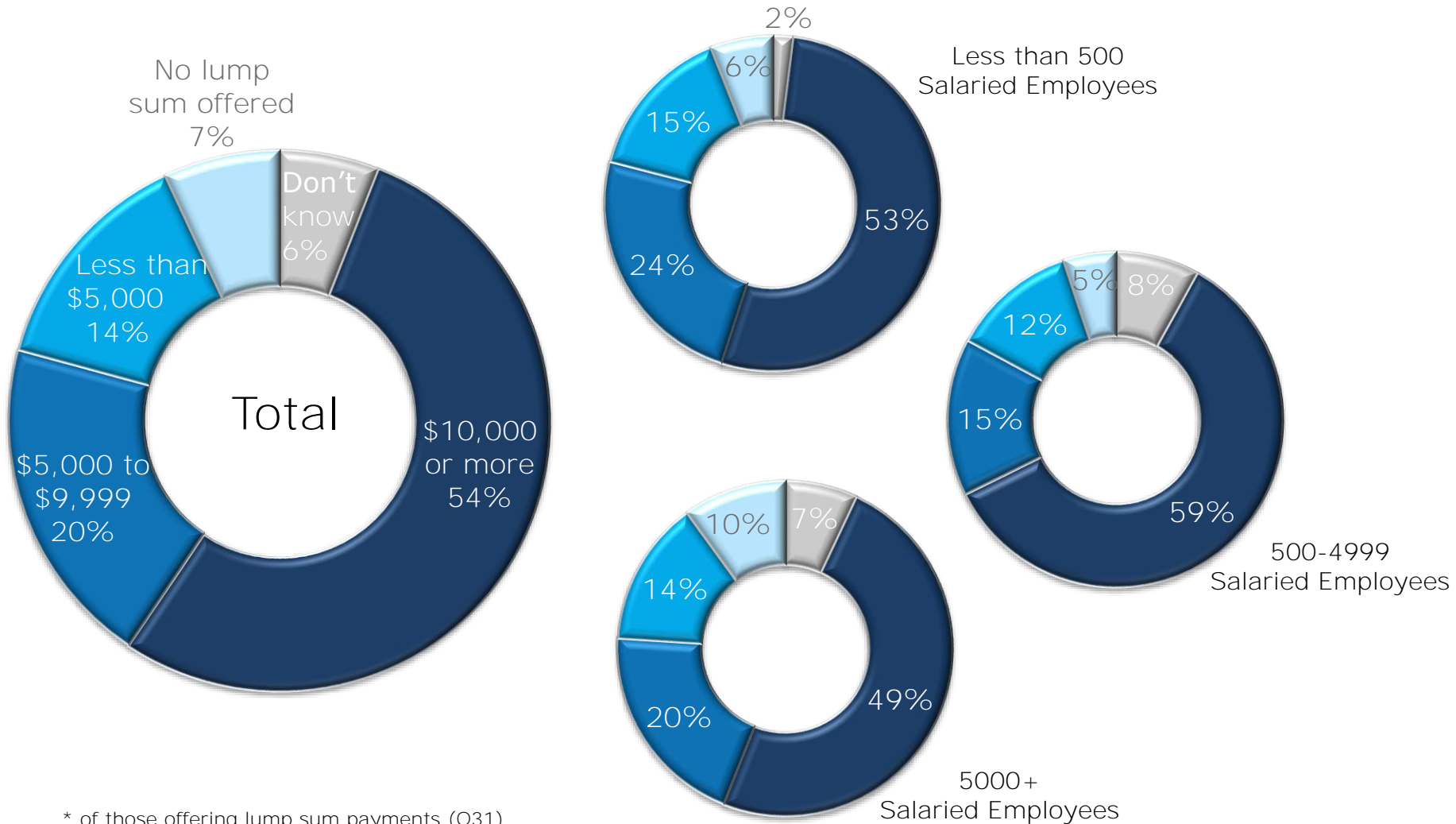
Q. 32c – Typical Range for Lump Sum Payments – Household Goods Shipping/Storage\*



\* of those offering lump sum payments (Q31)

# Relocation Costs

Q. 32c – Typical Range for Lump Sum Payments – Entire Relocation Cost\*

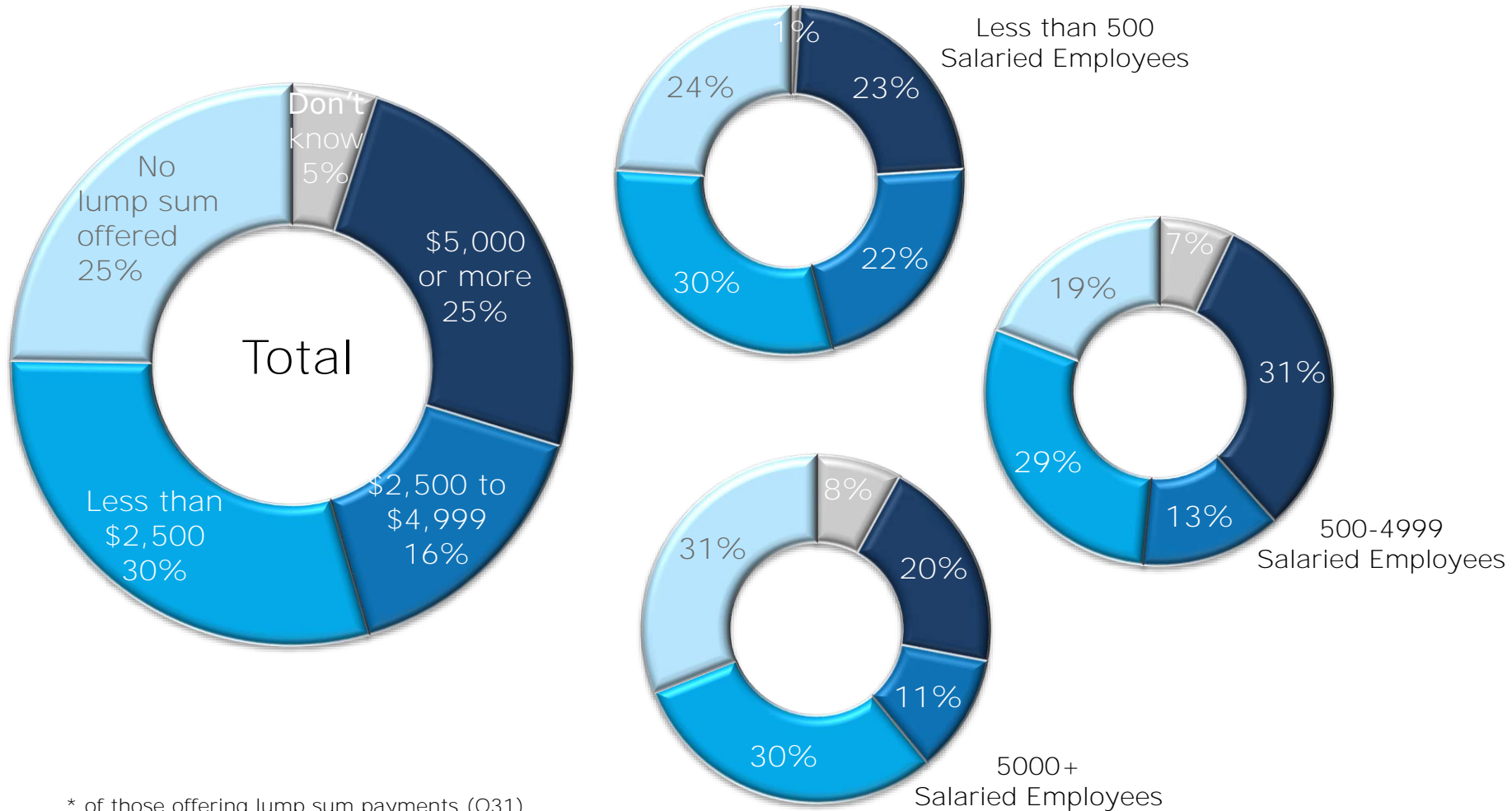


\* of those offering lump sum payments (Q31)



# Relocation Costs

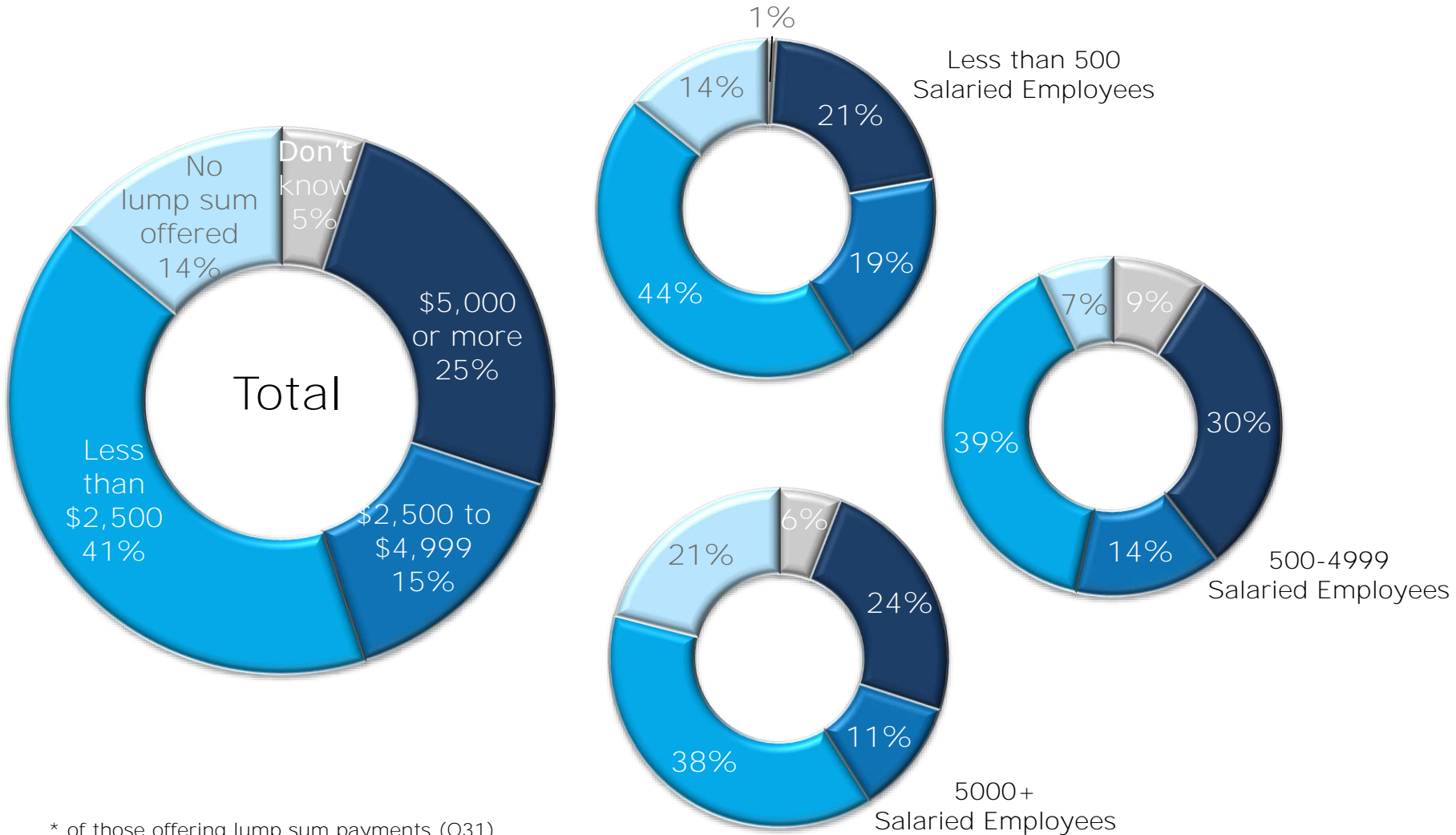
Q. 32c – Typical Range for Lump Sum Payments – Rental Assistance/Transactions\*



\* of those offering lump sum payments (Q31)

# Relocation Costs

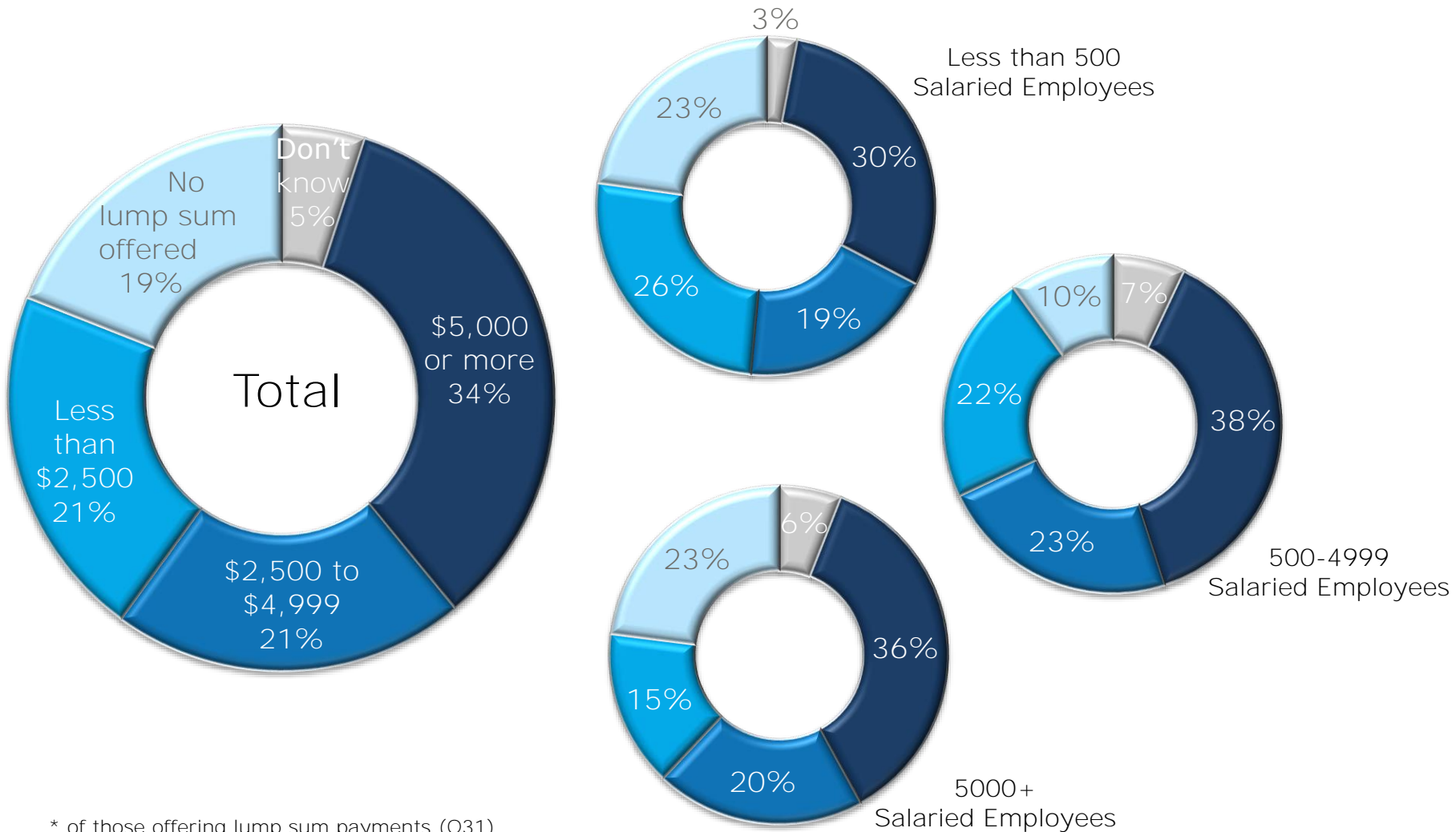
Q. 32c – Typical Range for Lump Sum Payments – Travel Expenses\*



\* of those offering lump sum payments (Q31)

# Relocation Costs

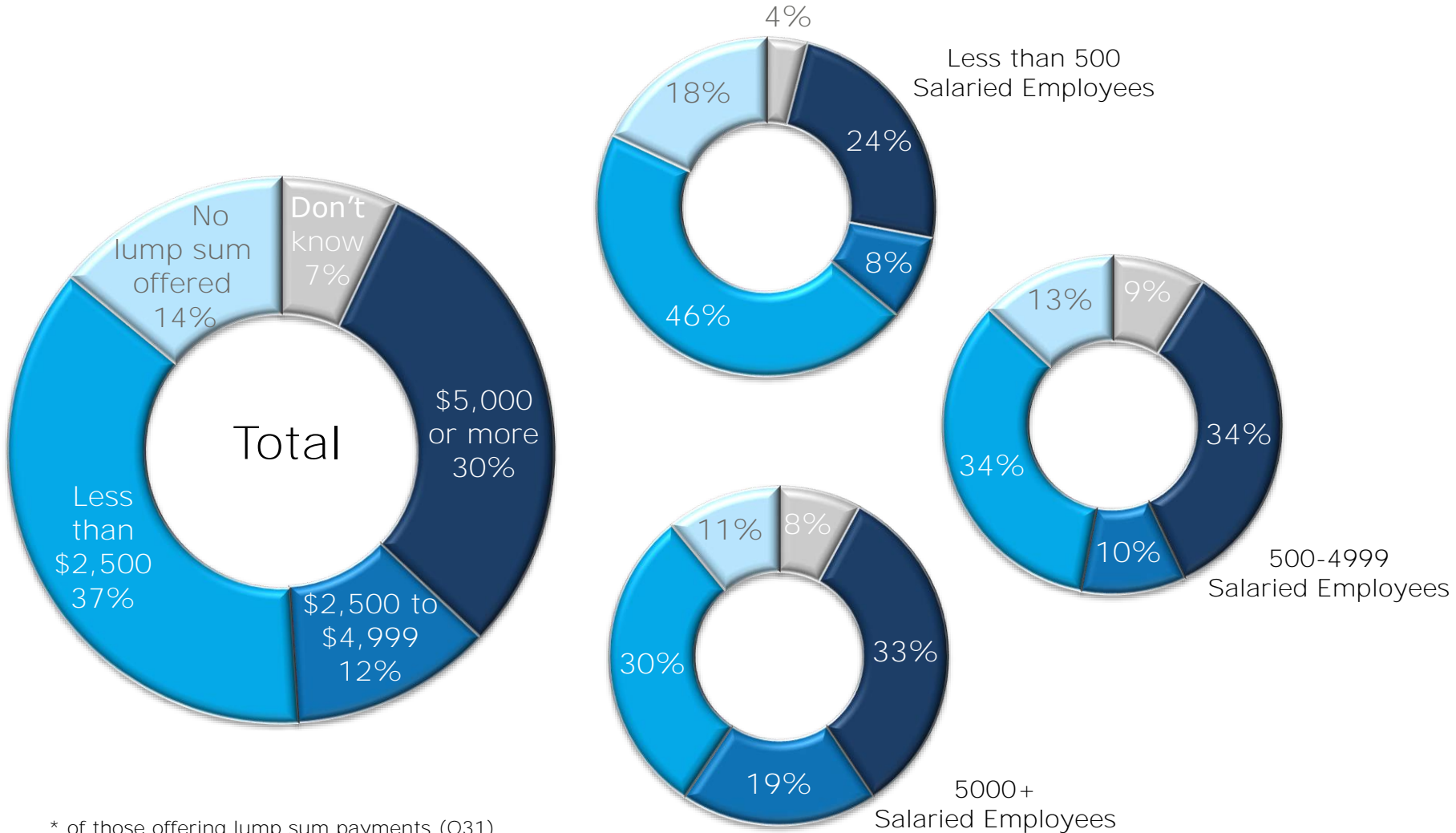
Q. 32c – Typical Range for Lump Sum Payments – Temporary Housing\*



\* of those offering lump sum payments (Q31)

# Relocation Costs

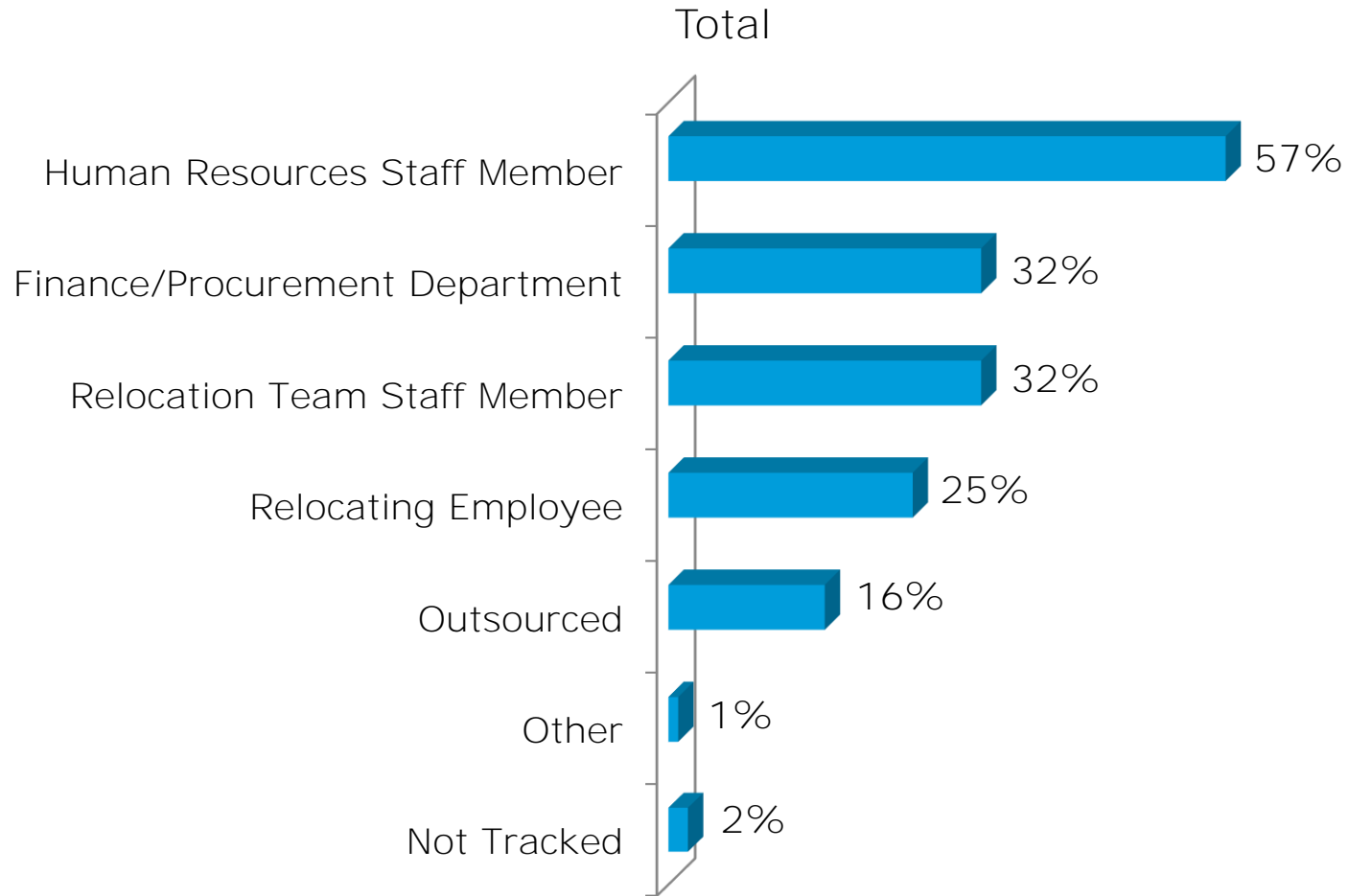
Q. 32c – Typical Range for Lump Sum Payments – Miscellaneous Allowances\*



\* of those offering lump sum payments (Q31)

# Relocation Costs

Q.32d – Lump Sum Spending/Allocation per Employee Tracking - Performed by: \*



\* of those offering lump sum payments (Q31)

# Relocation Costs

Q.32d – Lump Sum Spending/Allocation per Employee Tracking - Performed by: \*

By Company Size (Salaried Employees)

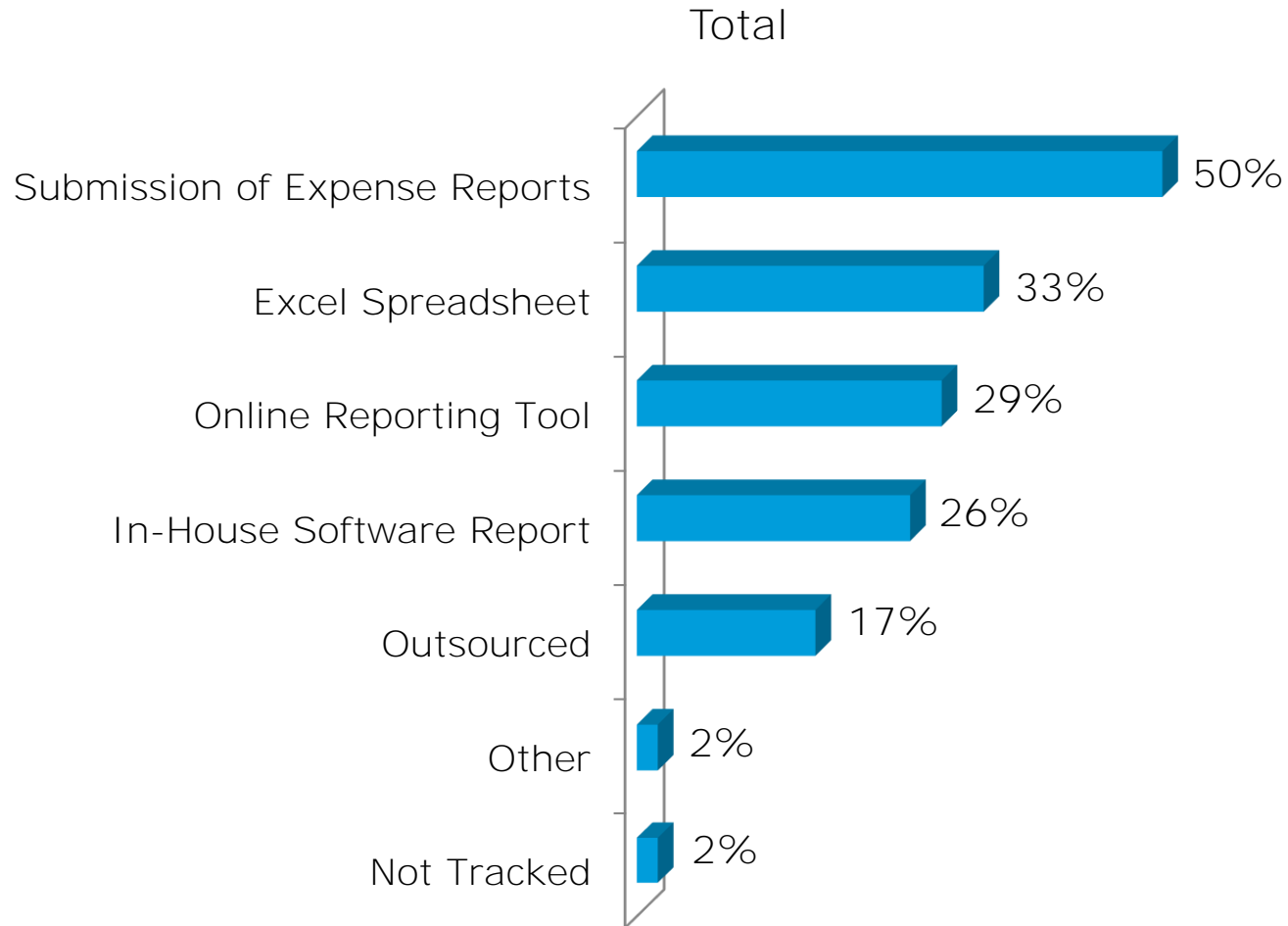
Lump Sum Tracking Performed by:	Total	Less than 500	500-4999	5000+
Human Resources Staff Member	57%	66%	62%	42%
Finance/Procurement Department	32%	31%	41%	23%
Relocation Team Staff Member	32%	22%	35%	41%
Relocating Employee	25%	26%	28%	22%
Outsourced	16%	11%	13%	26%
Other	1%	1%	0%	3%
Not Tracked	2%	1%	0%	4%

\* of those offering lump sum payments (Q31)



# Relocation Costs

Q.32d – Lump Sum Spending/Allocation per Employee Tracking - Method: \*



\* of those offering lump sum payments (Q31)

# Relocation Costs

Q.32d – Lump Sum Spending/Allocation per Employee Tracking - Method: \*

By Company Size (Salaried Employees)

Lump Sum Tracking Method:	Total	Less than 500	500-4999	5000+
Submission of Expense Reports	50%	55%	49%	45%
Excel Spreadsheet	33%	34%	40%	25%
Online Reporting Tool	29%	25%	36%	26%
In-House Software Report	26%	18%	35%	27%
Outsourced	17%	12%	17%	23%
Other	2%	3%	1%	3%
Not Tracked	2%	1%	1%	5%

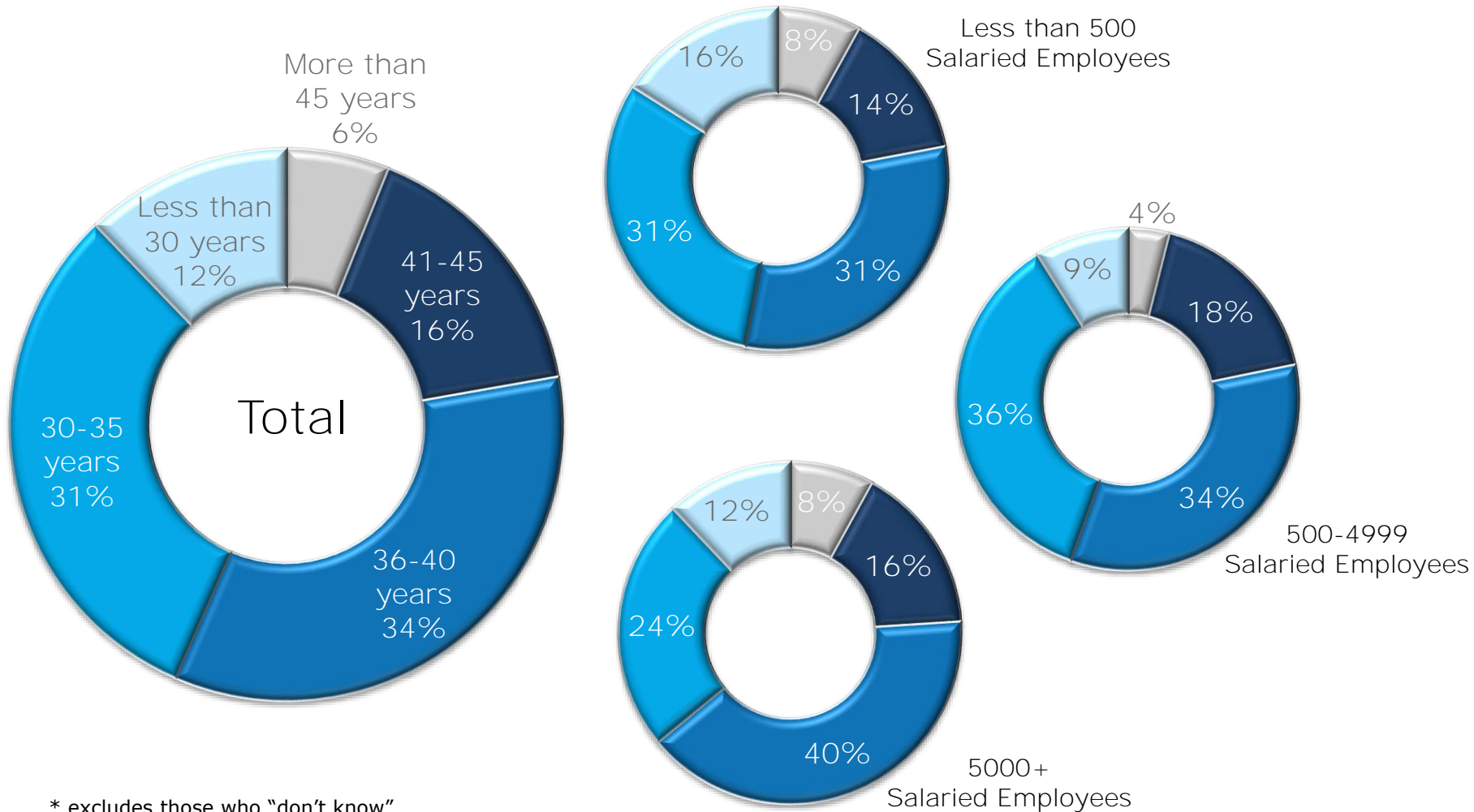
\* of those offering lump sum payments (Q31)





# Employee, Spousal & Assistance Issues

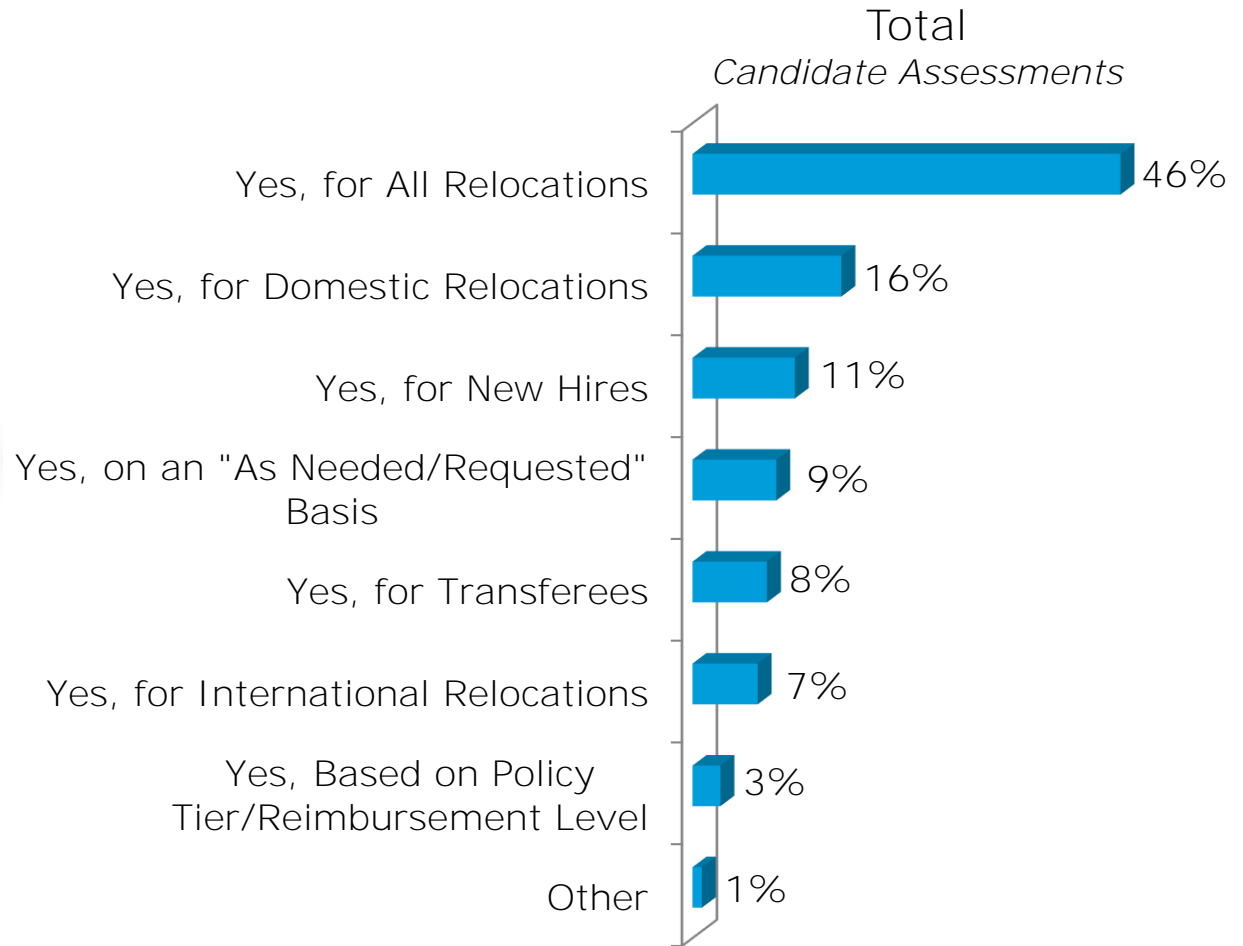
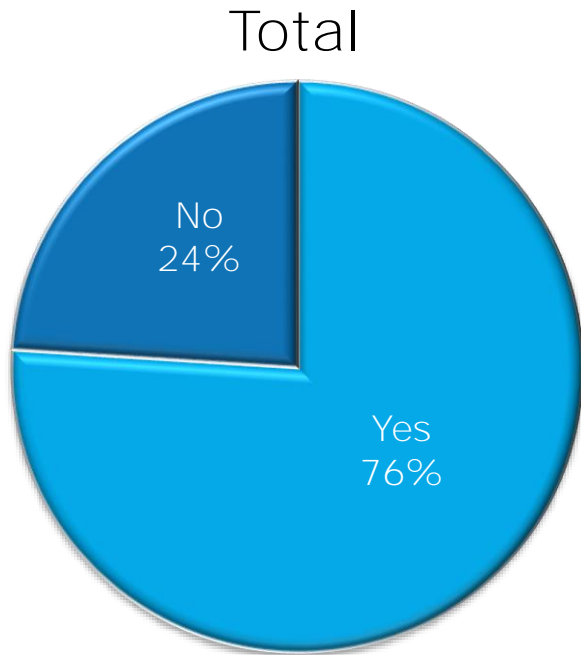
Q.33 – Age Range of Most Frequently Relocated Salaried Employee\*



\* excludes those who "don't know"

# Employee, Spousal & Assistance Issues

Q.34 – Does Your Organization Perform Candidate Assessments Prior to Relocation Offers?



# Employee, Spousal & Assistance Issues

*Q.34 – Does Your Organization Perform Candidate Assessments Prior to Relocation Offers?*

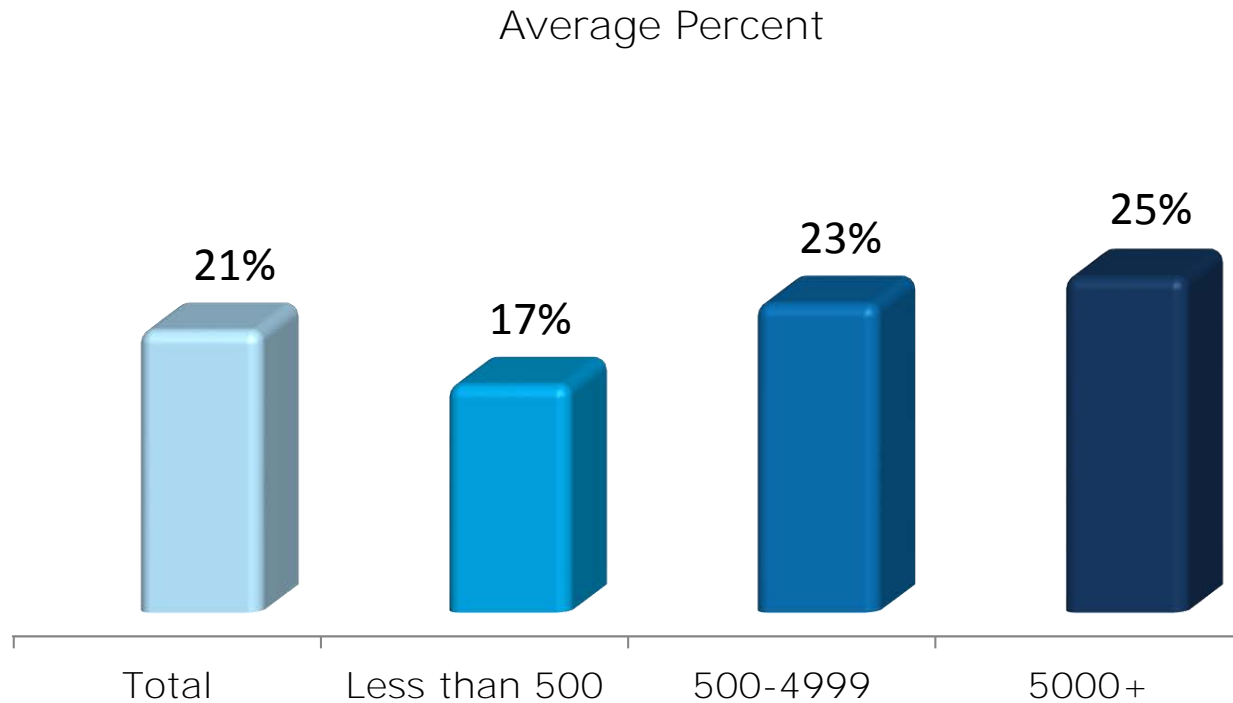
By Company Size (Salaried Employees)

Candidate Assessment Use	Total	Less than 500	500-4999	5000+
No, Candidate Assessments are Not Performed	24%	22%	26%	24%
Yes, for All Relocations	46%	46%	48%	44%
Yes, for Domestic Relocations	16%	19%	17%	12%
Yes, for New Hires	11%	14%	12%	8%
Yes, on an “As Needed/Requested” Basis	9%	8%	7%	13%
Yes, for Transferees	8%	10%	7%	6%
Yes, for International Relocations	7%	4%	7%	12%
Yes, Based on Policy Tier/Reimbursement Level	3%	3%	2%	4%
Other	1%	1%	1%	1%

# Employee, Spousal & Assistance Issues

*Q.35 – In 2015, What Approximate Percentage of Your Relocations Involved: Female Employees\**

By Company Size (Salaried Employees)

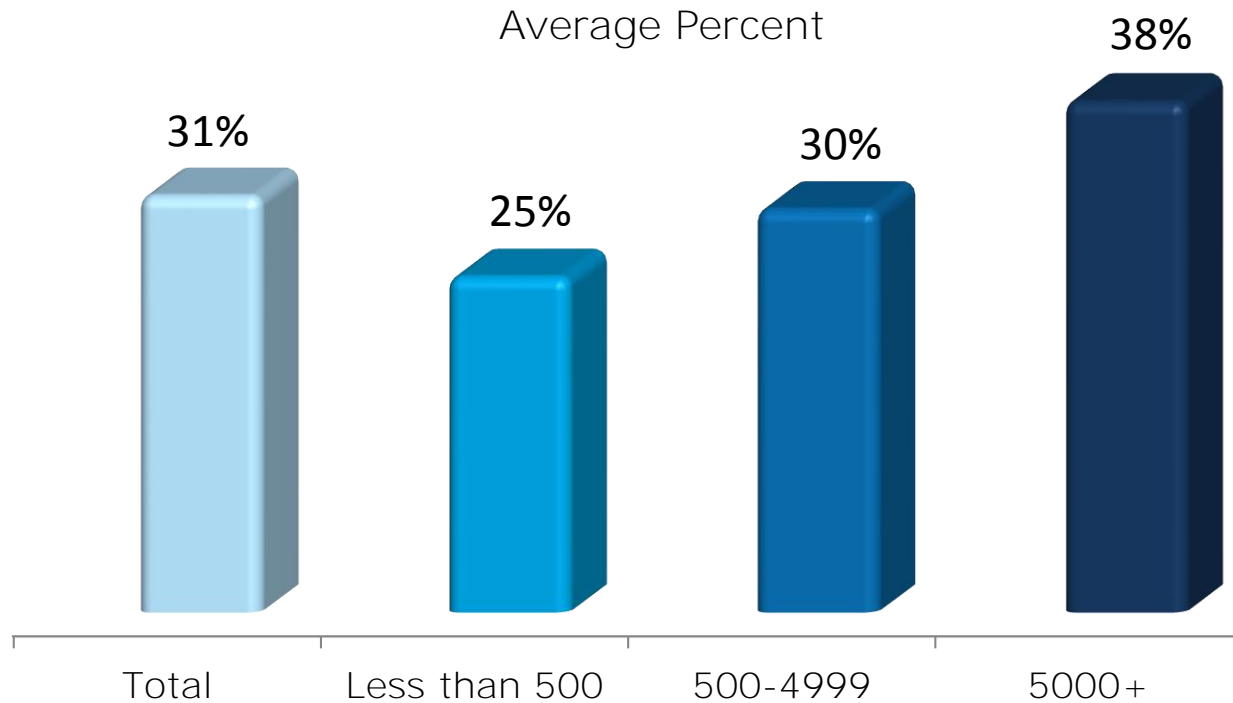


\* excludes those who "don't know"

# Employee, Spousal & Assistance Issues

Q.35 – In 2015, What Approximate Percentage of Your Relocations Involved: Wife/Female Partner (Trailing Spouse) \*

By Company Size (Salaried Employees)

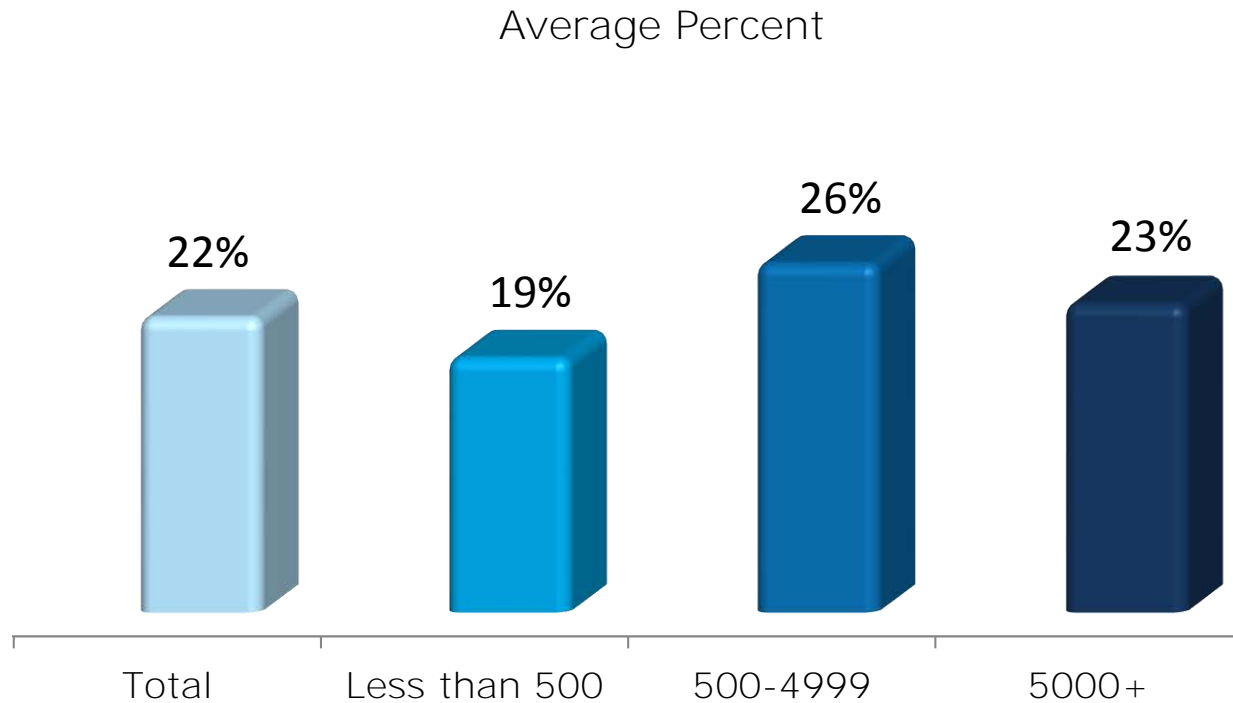


\* excludes those who "don't know"

# Employee, Spousal & Assistance Issues

*Q.35 - In 2015, What Approximate Percentage of Your Relocations Involved: Husband/Male Partner (Trailing Spouse) \**

By Company Size (Salaried Employees)

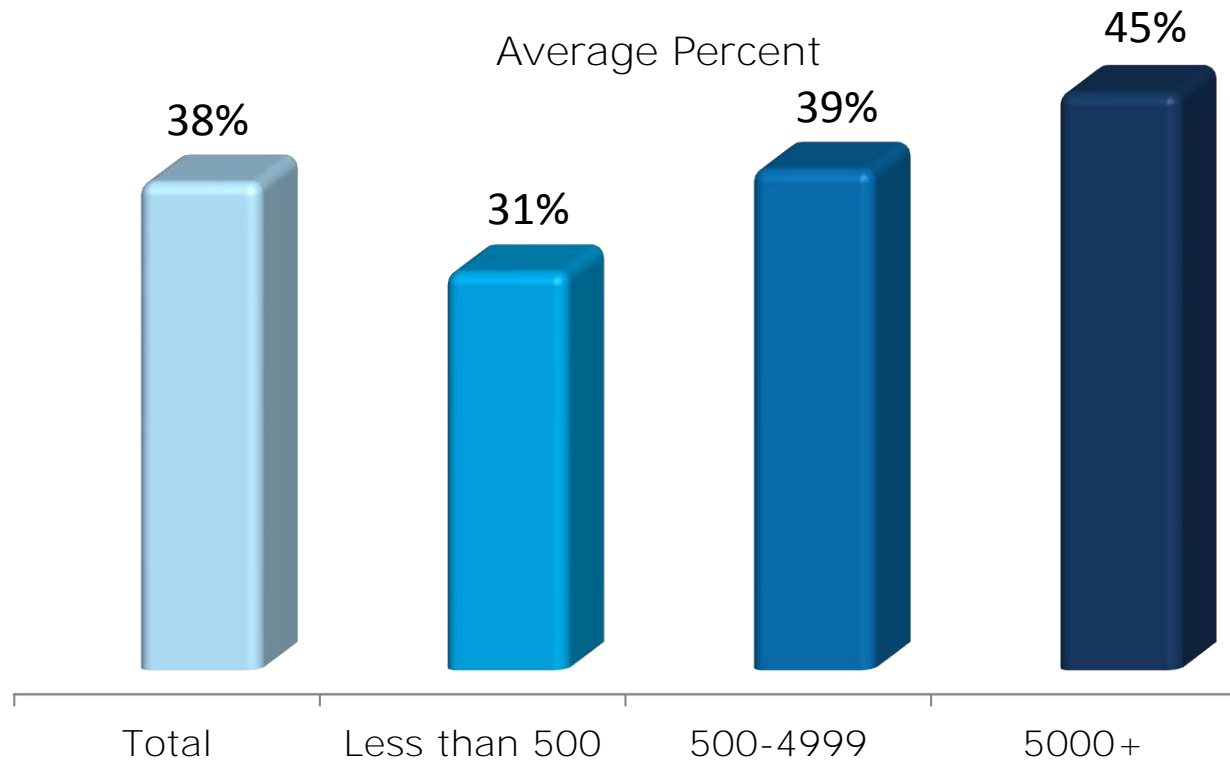


\* excludes those who "don't know"

# Employee, Spousal & Assistance Issues

*Q.35 – In 2015, What Approximate Percentage of Your Relocations Involved: Employees with Children\**

By Company Size (Salaried Employees)

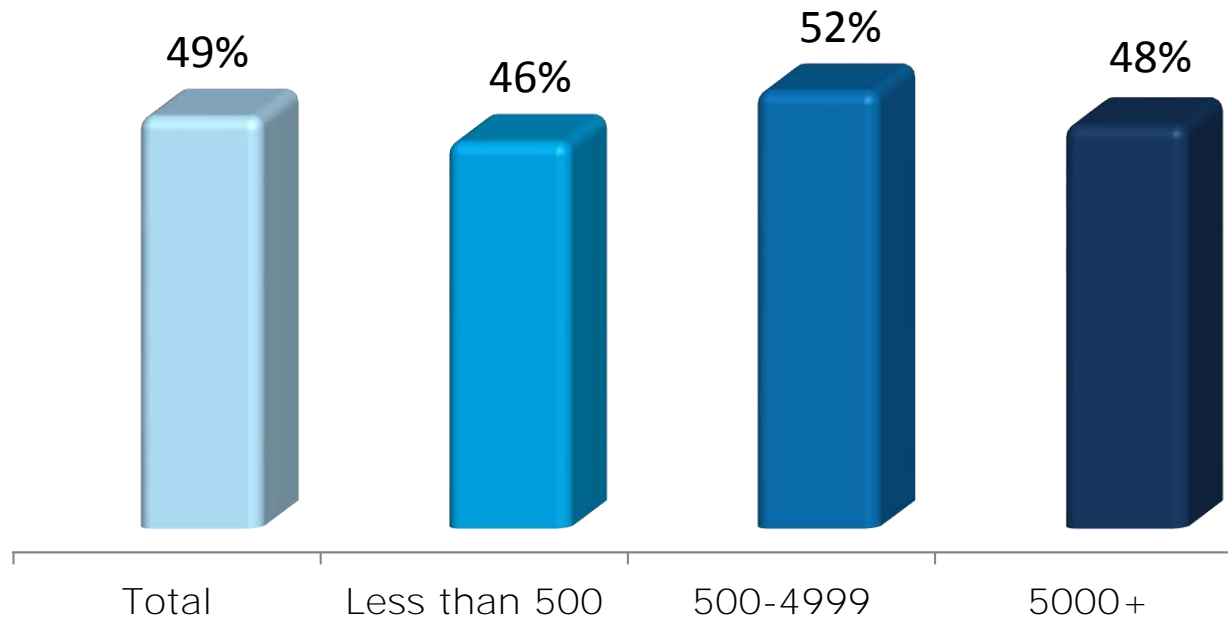


\* excludes those who "don't know"

# Employee, Spousal & Assistance Issues

Q.36 – Companies Offering Elder Care Assistance\*

By Company Size (Salaried Employees)



\* % of companies indicating they offer this assistance (Q36)



# Employee, Spousal & Assistance Issues

## *Q.36 – Elder Care Assistance Offered*

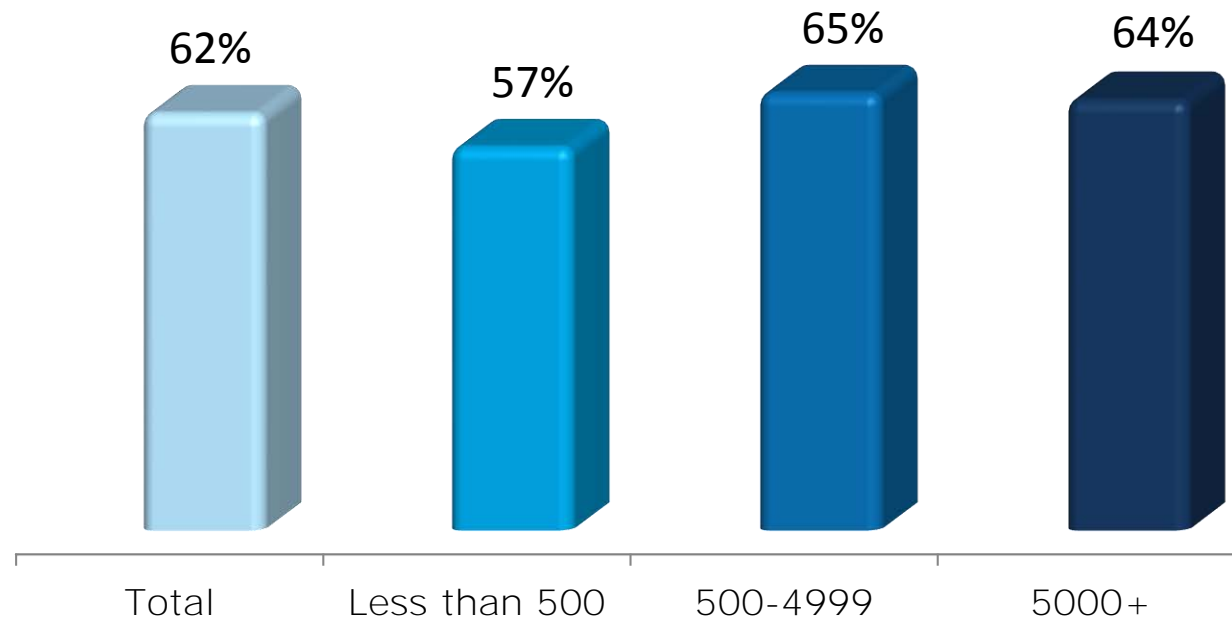
By Company Size (Salaried Employees)

<b>Elder Care Assistance</b>	<b>Total</b>	<b>Less than 500</b>	<b>500-4999</b>	<b>5000+</b>
No Elder Care Assistance	51%	54%	48%	52%
Provide Paid Personal Leave Days	24%	26%	28%	18%
Allow Flexible Scheduling or Telecommuting	23%	22%	26%	21%
Allow Employee to Use Pre-Tax Dollars for Outside Care	20%	18%	21%	20%
Provide List of Nursing Homes and/or Day-Care Centers	19%	19%	21%	16%
Relocate an Elderly Relative that Does Not Live with the Employee Currently, but Will Either Live with the Employee at the New Location or at a Nearby Residence/Facility	14%	11%	12%	20%
Other	2%	1%	3%	1%

# Employee, Spousal & Assistance Issues

Q.37 – Companies Offering Childcare Assistance\*

By Company Size (Salaried Employees)



\* % of companies indicating they offer this assistance (Q37)

# Employee, Spousal & Assistance Issues

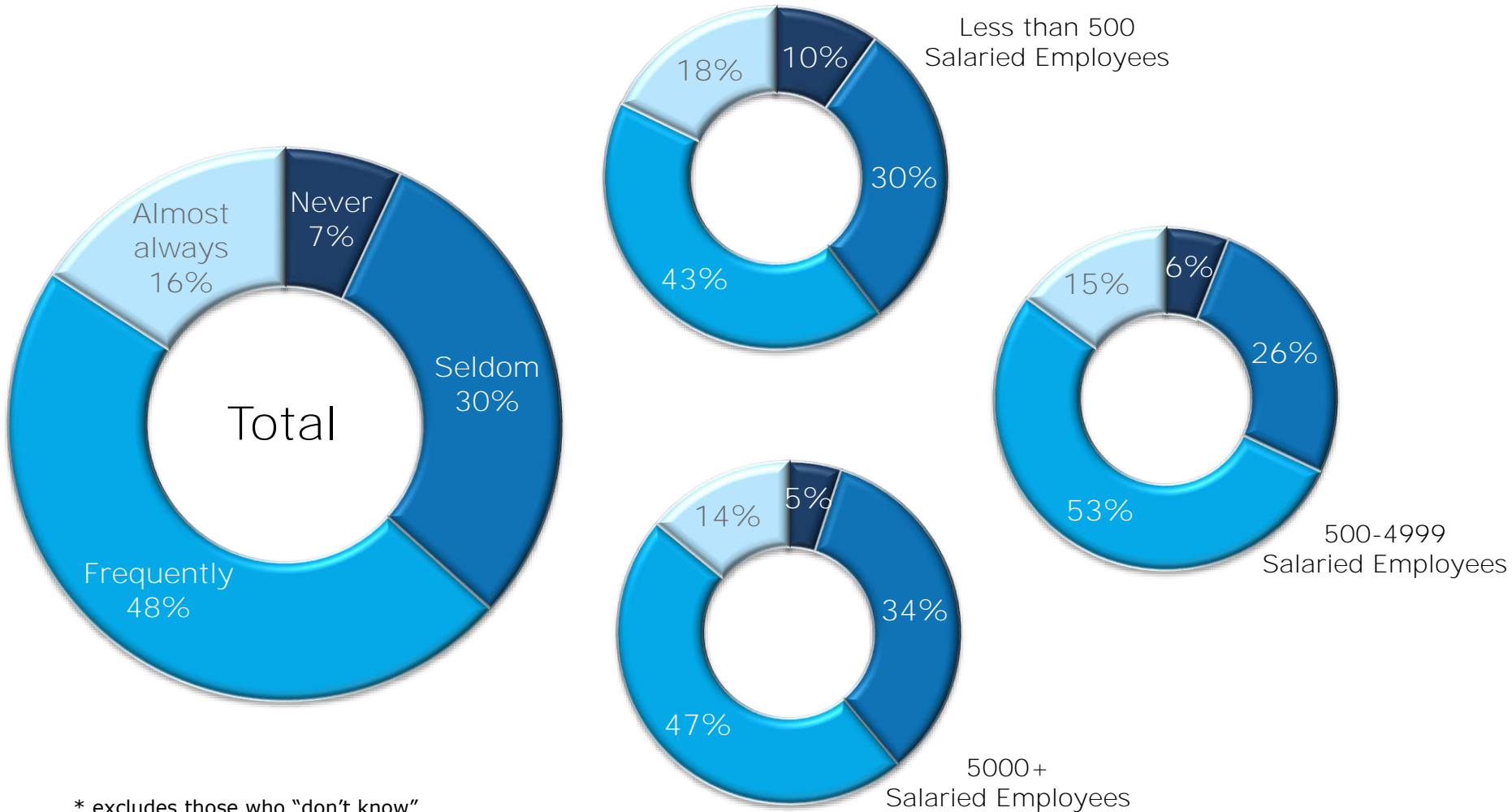
## Q.37 – Childcare Assistance Offered

By Company Size (Salaried Employees)

Childcare Assistance	Total	Less than 500	500-4999	5000+
No Childcare Assistance	38%	43%	35%	36%
Provide List of Childcare Providers/Services and/or Agencies	32%	25%	35%	37%
Provide List of Local Schools/Educational Options	32%	25%	41%	30%
Provide Paid Personal Leave Days	27%	27%	30%	23%
Allow Flexible Scheduling or Telecommuting	25%	26%	27%	22%
Allow Employee to Use Pre-Tax Dollars for Outside Care	25%	22%	26%	28%
Other	2%	2%	1%	3%

# Employee, Spousal & Assistance Issues

Q.38 – Frequency of Employee’s Relocation Being Affected by the Employment Status of His/Her Spouse/Partner\*



\* excludes those who "don't know"

# Employee, Spousal & Assistance Issues

Q.39 – Companies that Allow the Hiring of Spouses of Employees\*

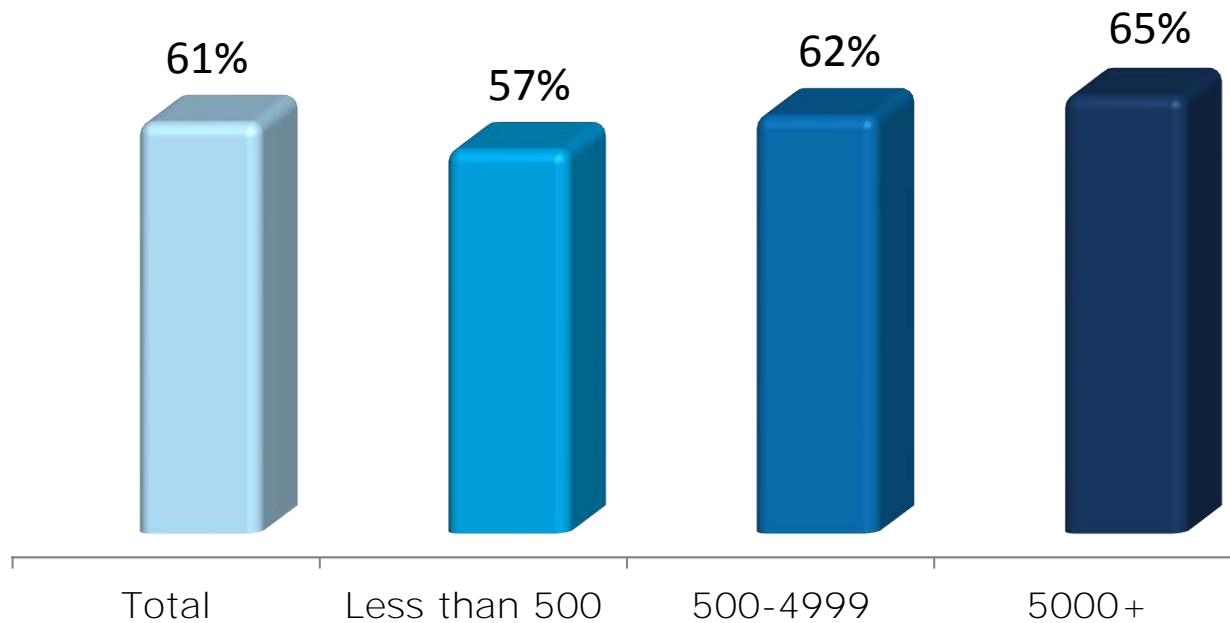


\* % of companies answering "Yes" / excludes those who "don't know"

# Employee, Spousal & Assistance Issues

*Q.39a – Companies that Assist an Employee’s Spouse or Partner in Finding Employment in the New Location\**

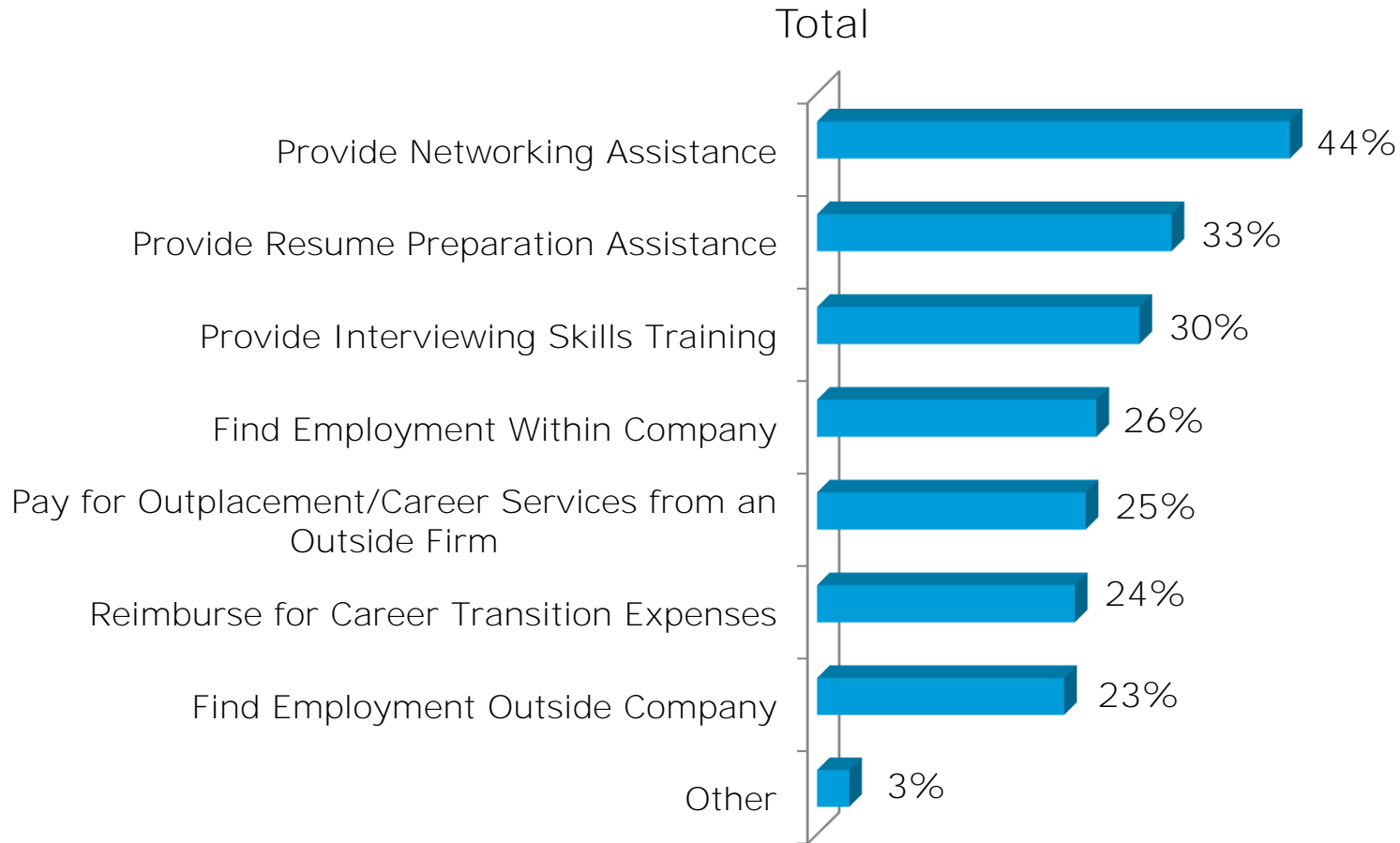
By Company Size (Salaried Employees)



\* % of companies indicating "Yes"

# Employee, Spousal & Assistance Issues

Q.39b – Methods of Spousal/Partner Employment Assistance\*



\* of those who provide assistance (Q39a)

# Employee, Spousal & Assistance Issues

## *Q.39b – Methods of Spousal/Partner Employment Assistance\**

By Company Size (Salaried Employees)

Spousal/Partner Employment Assistance	Total	Less than 500	500-4999	5000+
Provide Networking Assistance	44%	45%	46%	41%
Provide Resume Preparation Assistance	33%	30%	39%	30%
Provide Interviewing Skills Training	30%	26%	34%	30%
Find Employment Within Company	26%	23%	32%	24%
Pay for Outplacement/Career Services from an Outside Firm	25%	16%	27%	32%
Reimburse for Career Transition Expenses (i.e. interview trips, certifications, etc.)	24%	16%	25%	31%
Find Employment Outside Company	23%	23%	28%	18%
Other	3%	3%	1%	5%

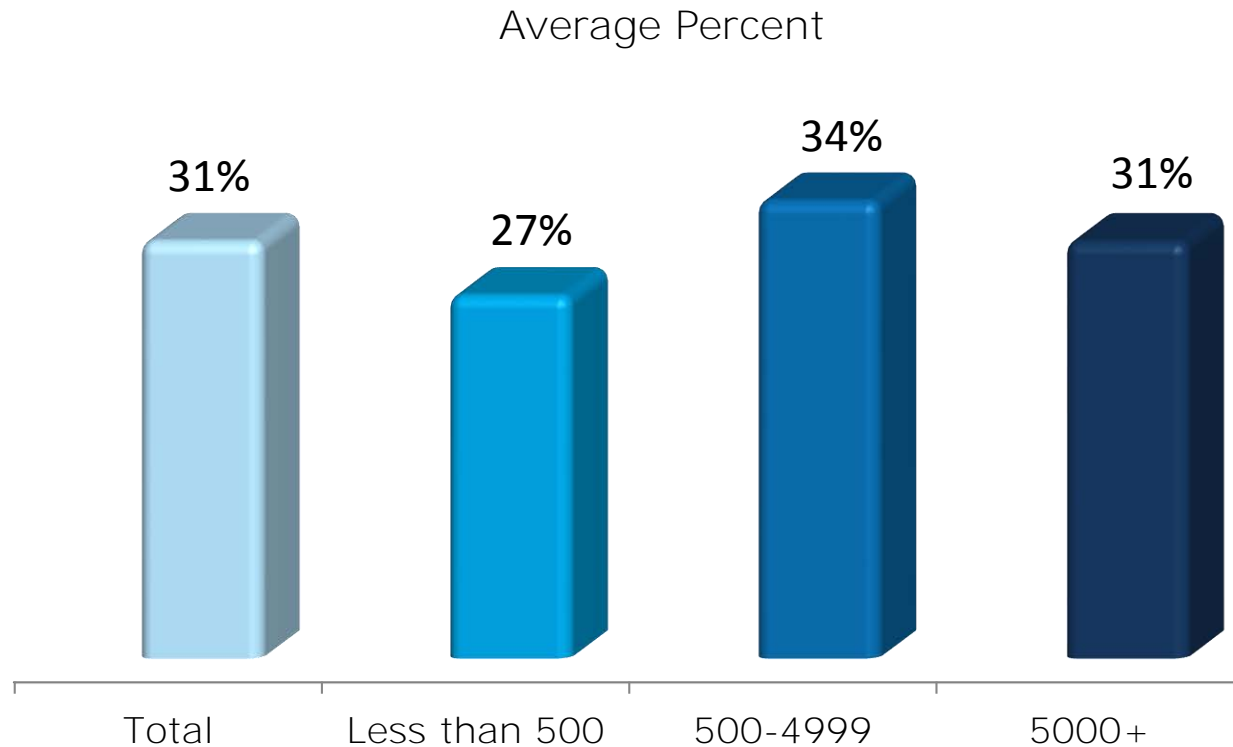
\* of those who provide assistance (Q39a)



# Employee, Spousal & Assistance Issues

*Q.39c – Approximate Percentage of Relocated Employees with a Spouse/Partner Who Used Employment Assistance\**

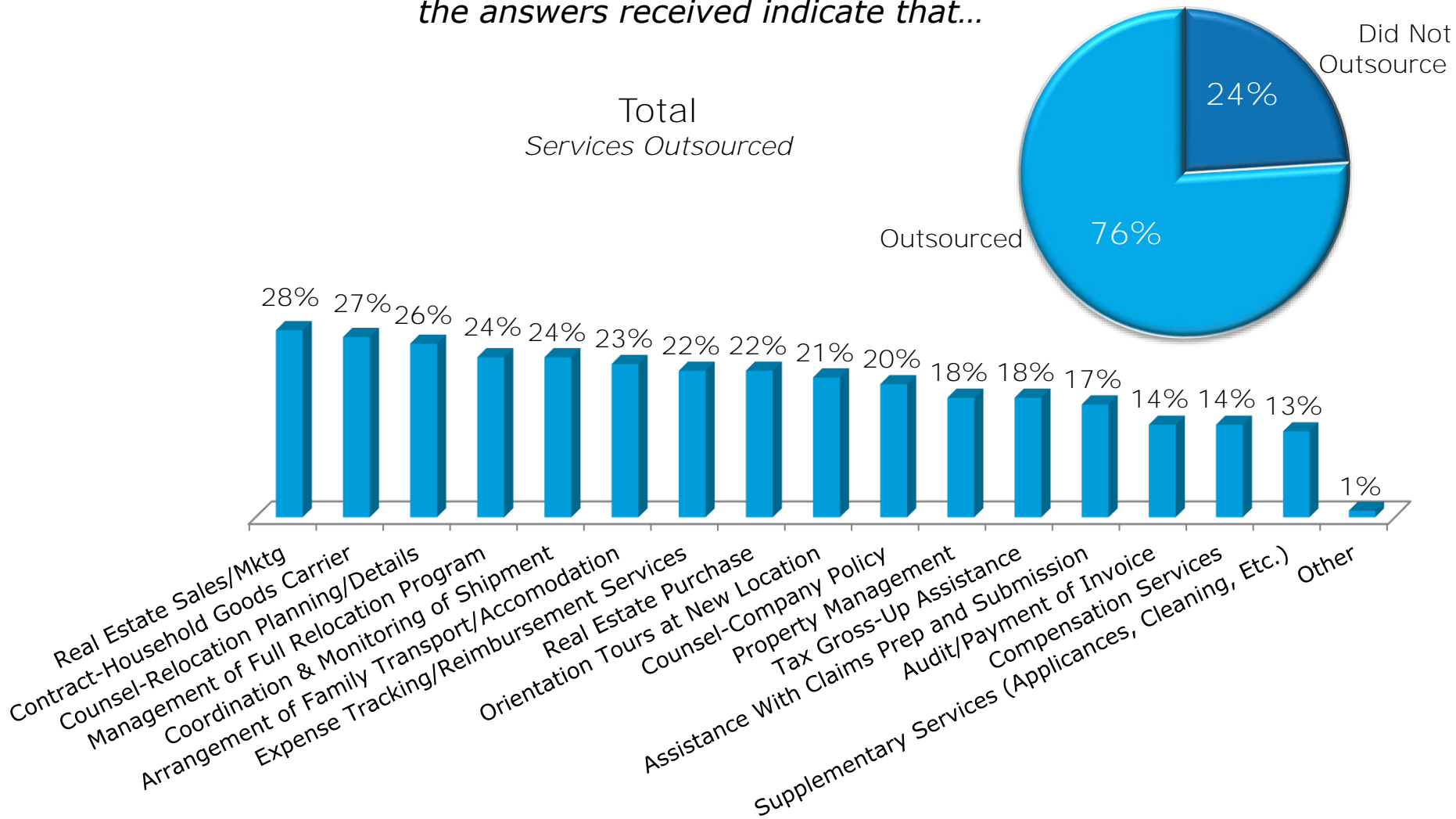
By Company Size (Salaried Employees)



\* of those who provide assistance (Q39a) / excludes those who "don't know"

# Supplier Management

Q.40 – Respondents were given a list of possible outsourced relocation services in 2015 – the answers received indicate that...



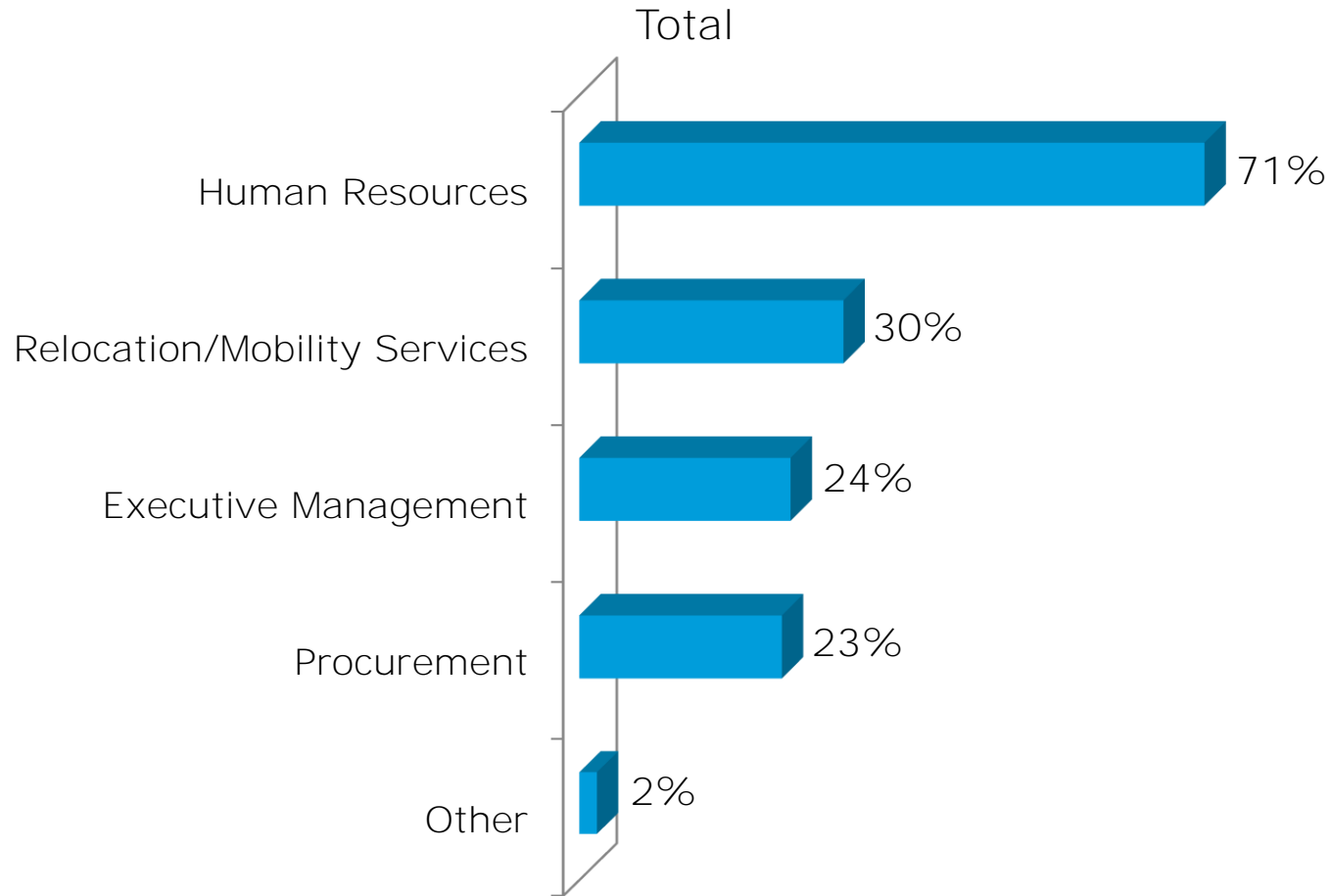
# Supplier Management

## Q. 40 – Services Outsourced to a Relocation Service, HRO or Brokerage Firm in 2015 By Company Size (Salaried Employees)

Services Outsourced in 2015	Total	Less than 500	500-4999	5000+
Did Not Use a Relocation Service, HRO or Brokerage Firm in 2015	24%	37%	25%	10%
Real Estate Sales/Marketing	28%	15%	30%	40%
Contract of Household Goods Carrier	27%	15%	30%	39%
Counseling about Relocation Planning/Details	26%	16%	32%	30%
Management of Full Relocation Program	24%	15%	25%	34%
Coordination & Monitoring of Shipment	24%	12%	23%	39%
Arrangement of Family's Transportation and Accommodations	23%	14%	30%	26%
Expense Tracking/Reimbursement Services	22%	13%	22%	32%
Real Estate Purchase	22%	11%	23%	33%
Orientation Tours at New Location	21%	13%	24%	28%
Counseling about Company Policy	20%	14%	21%	25%
Property Management	18%	10%	18%	27%
Tax Gross-Up Assistance	18%	14%	18%	23%
Assistance with Employee Claims Prep/Submission	17%	10%	19%	21%
Audit and/or Payment of Invoice	14%	8%	12%	23%
Compensation Services (i.e. payroll arrangements, tax compliance, etc.)	14%	11%	12%	20%
Supplementary Services (appliances, cleaning, etc.)	13%	8%	14%	18%
Other	1%	1%	1%	1%

# Supplier Management

Q. 40a – Department(s) that Select a Relocation Service, HRO or Brokerage Firm\*



\* of those companies who outsourced (Q40)

# Supplier Management

Q. 40a – Department(s) that Select a Relocation Service, HRO or Brokerage Firm\*

By Company Size (Salaried Employees)

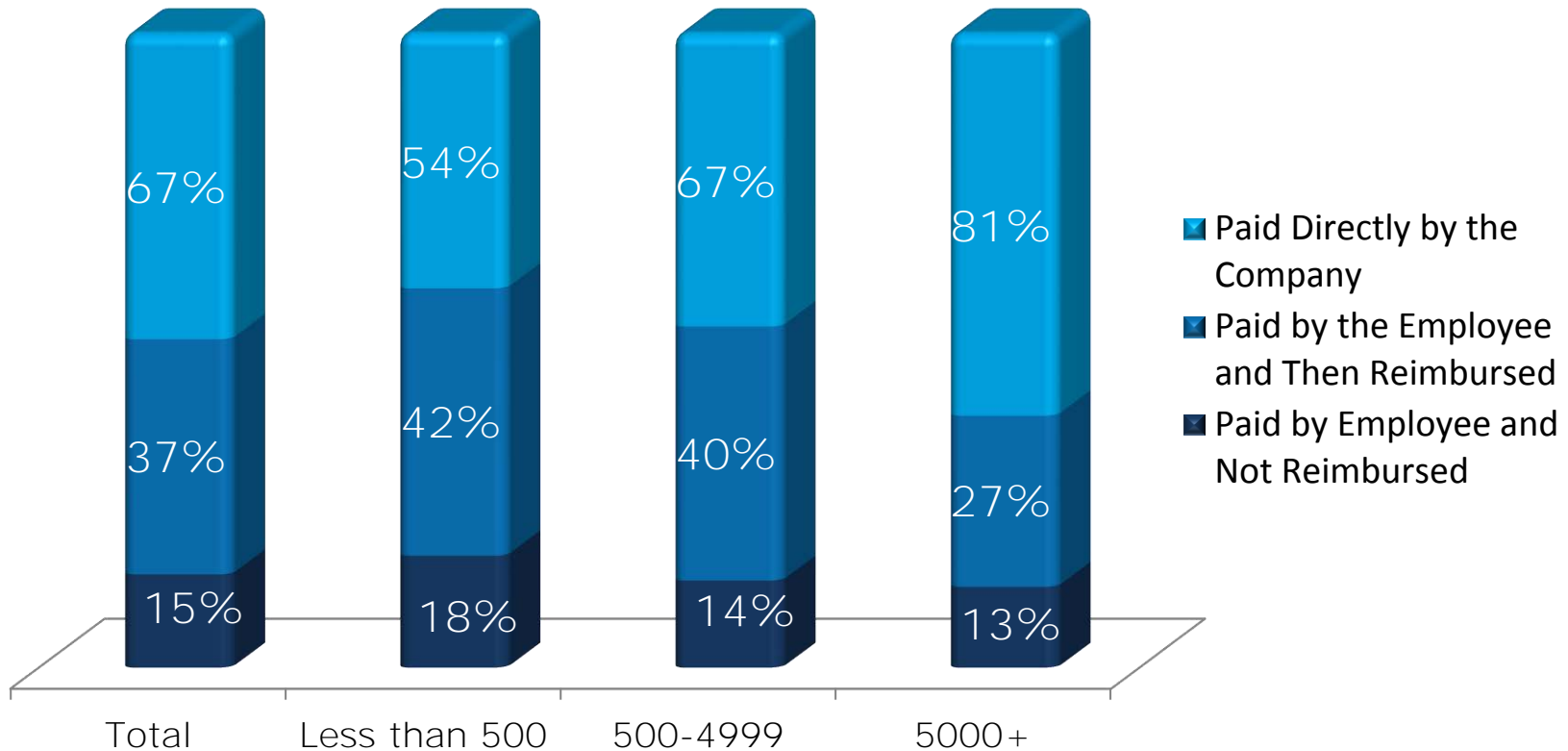
Department(s) Selecting Outsourcing Vendor	Total	Less than 500	500-4999	5000+
Human Resources	71%	74%	80%	59%
Relocation/Mobility Services	30%	12%	26%	47%
Executive Management	24%	28%	26%	19%
Procurement	23%	15%	22%	30%
Other	2%	5%	2%	1%

\* of those companies who outsourced (Q40)

# Supplier Management

Q.41 – Are Carrier Transportation Expenses Paid Directly by the Company or Paid by the Employee and Then Reimbursed? (Transferees ONLY)\*

By Company Size (Salaried Employees)

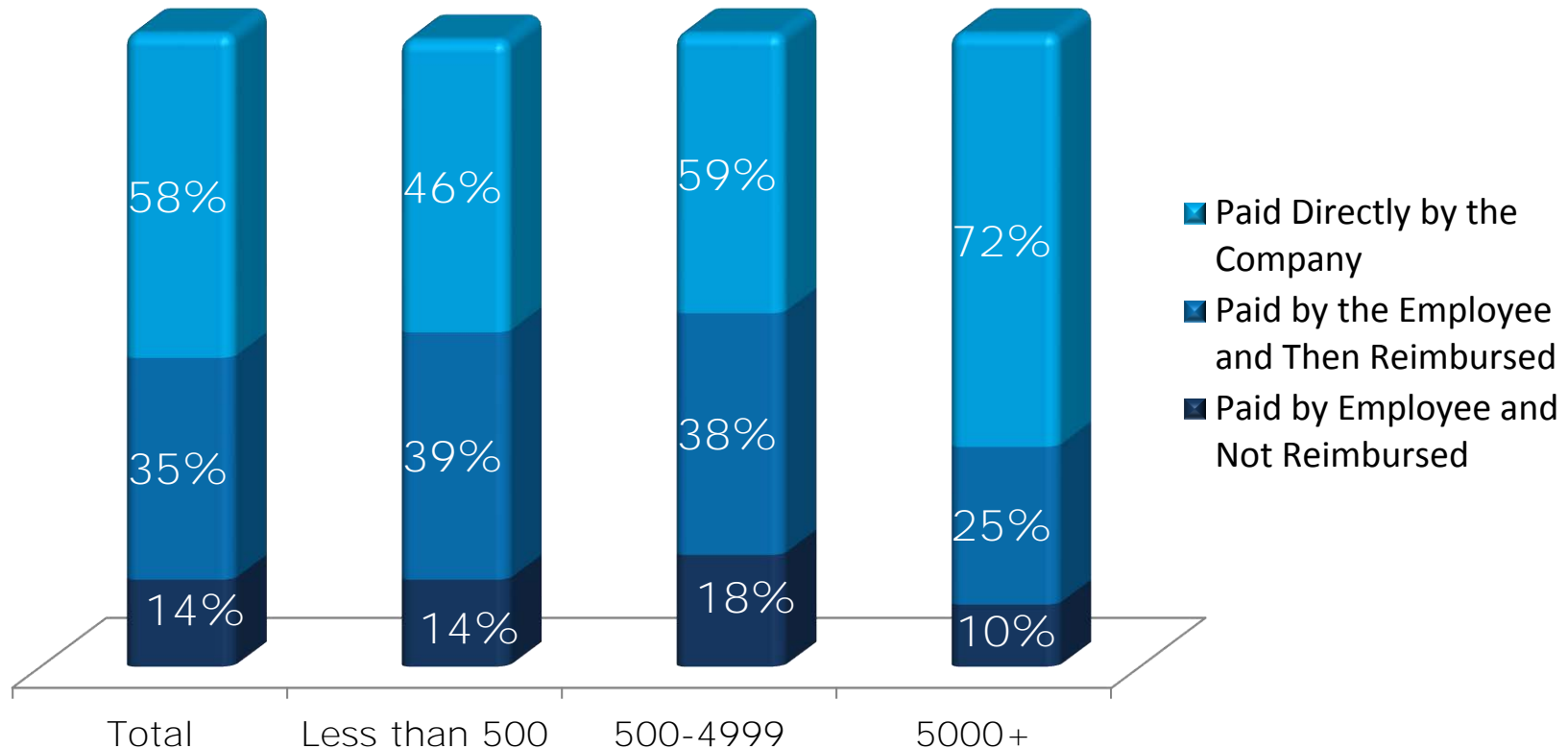


\* respondents could indicate more than one method was used

# Supplier Management

Q. 41 – Are Carrier Transportation Expenses Paid Directly by the Company or Paid by the Employee and Then Reimbursed? (New Hires ONLY) \*

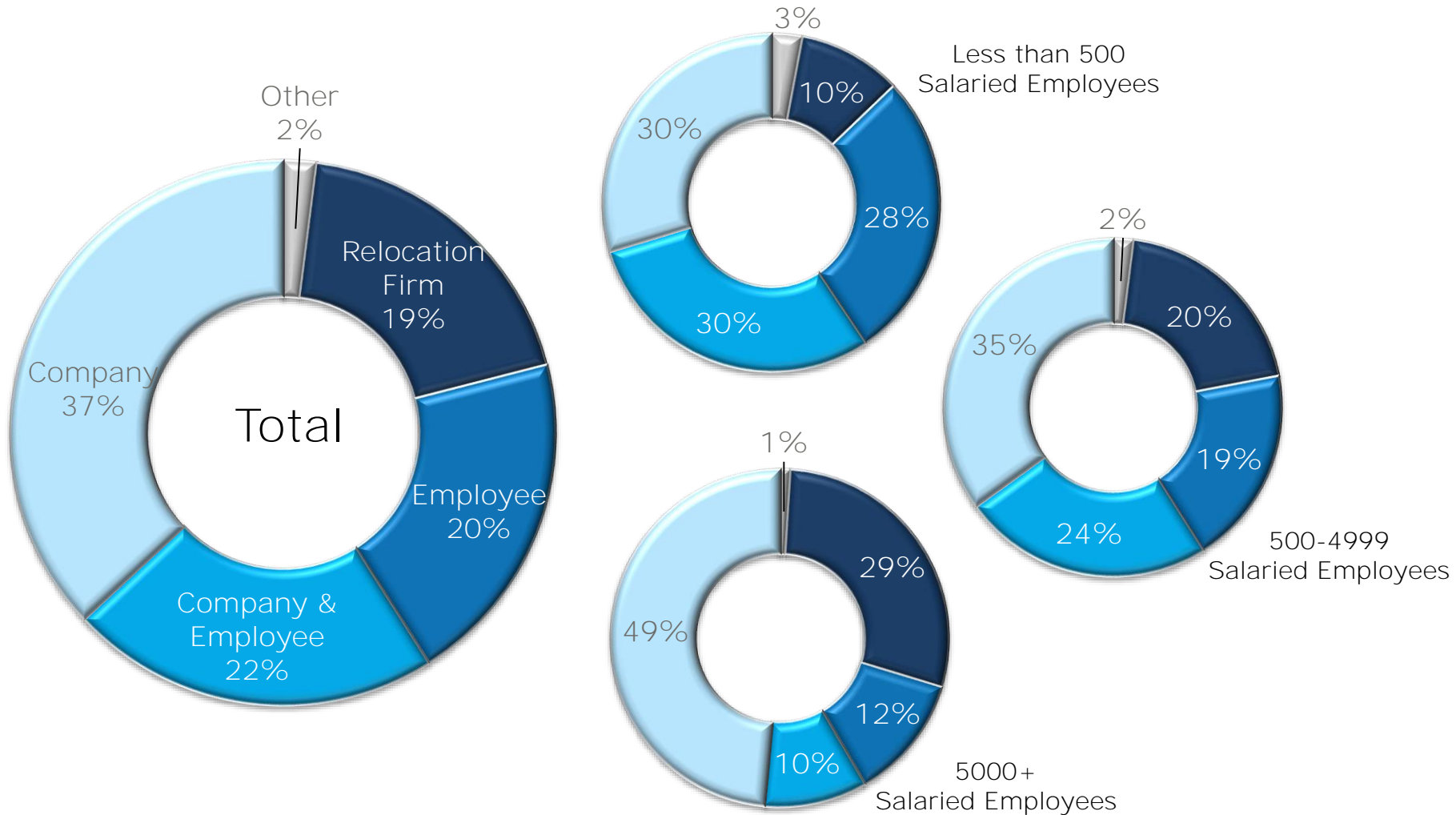
By Company Size (Salaried Employees)



\* respondents could indicate more than one method was used

# Supplier Management

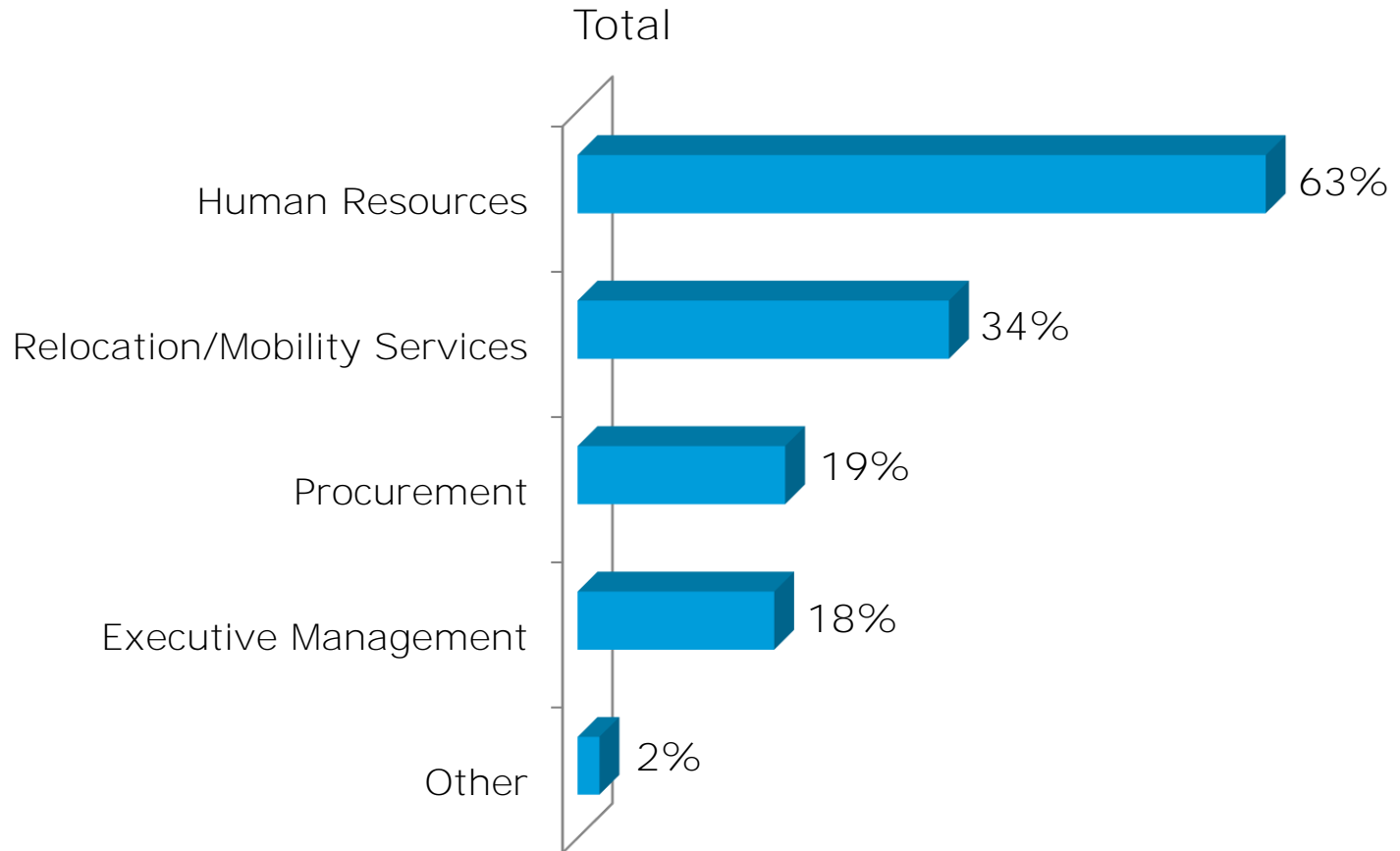
Q.42 – Who Selects the Household Goods Carrier for Your Employee’s Relocation?





# Supplier Management

Q.42a – Department(s) that Select the Household Goods Carrier for Employee's Relocation\*



\* of those where company was involved in carrier selection (Q42)

# Supplier Management

*Q. 42a – Department(s) that Select a Household Goods Carrier for Employee's Relocation\**

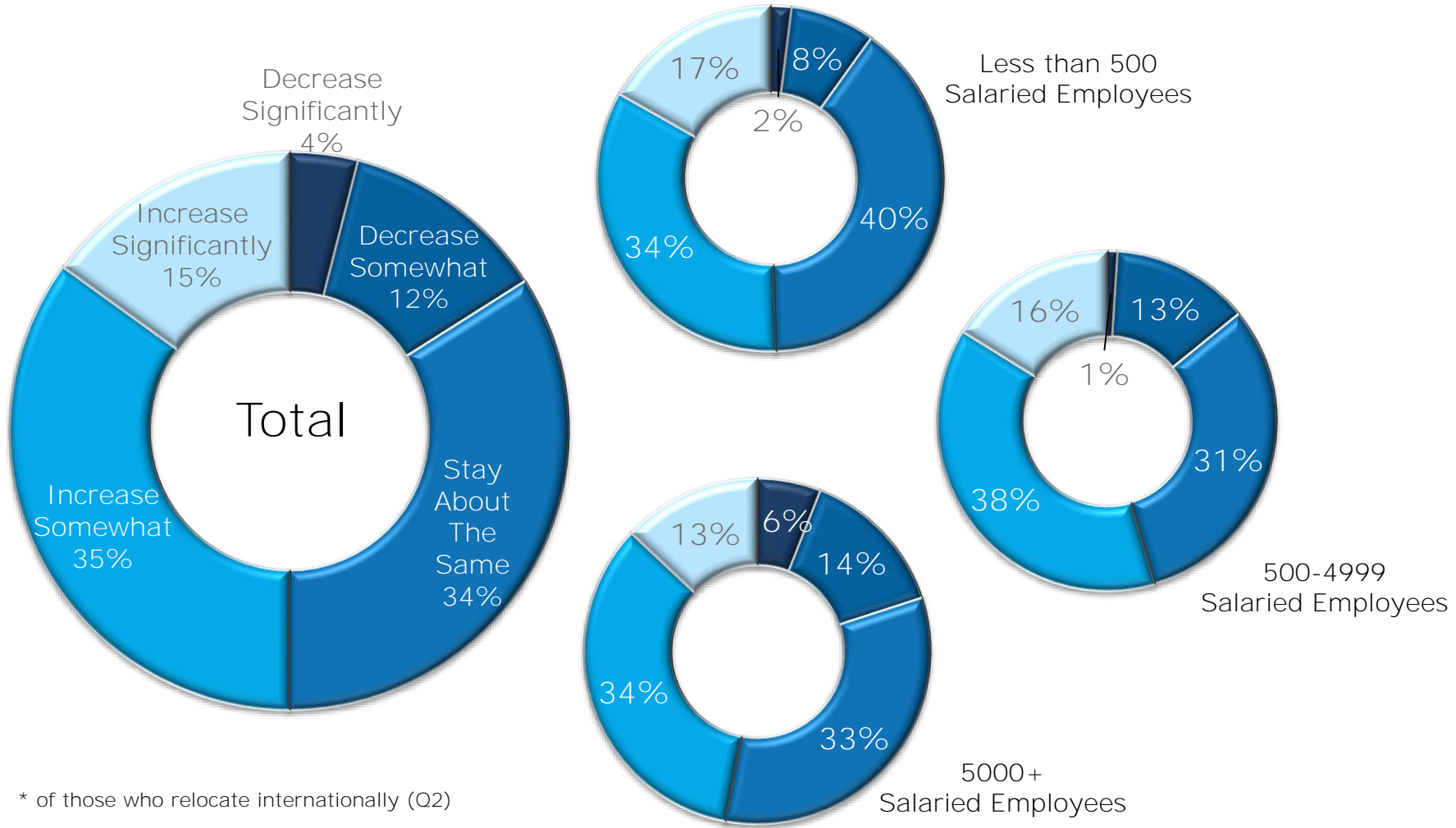
By Company Size (Salaried Employees)

Department(s) Selecting Household Goods Carrier	Total	Less than 500	500-4999	5000+
Human Resources	63%	71%	62%	53%
Relocation/Mobility Services	34%	15%	37%	52%
Procurement	19%	12%	23%	23%
Executive Management	18%	24%	12%	16%
Other	2%	3%	1%	1%

\* of those where company was involved in carrier selection (Q42)

# International

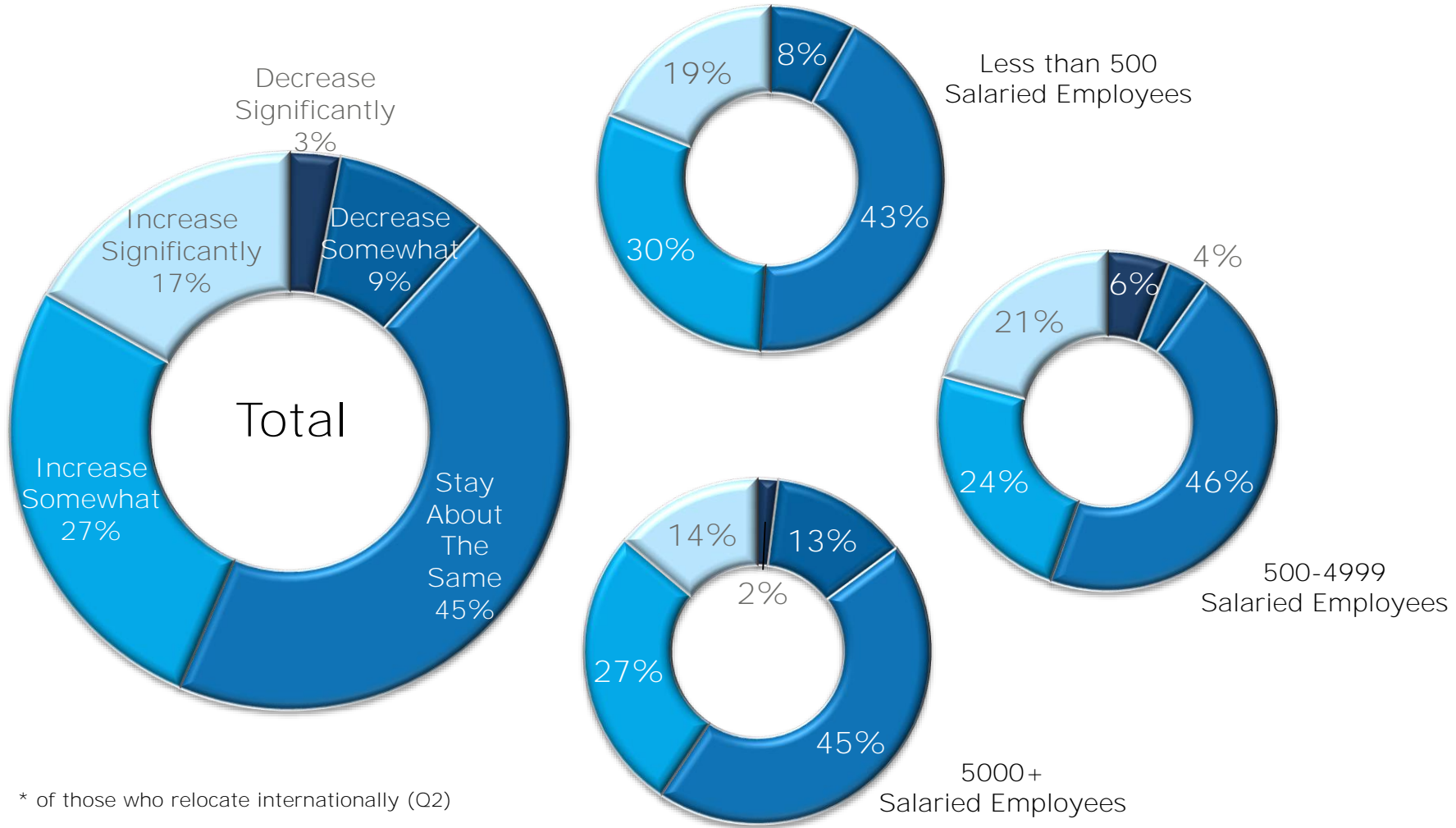
Q.43a – Compared to 2014, Did the Number of Employees Your Company Relocated Internationally During 2015...\*



\* of those who relocate internationally (Q2)

# International

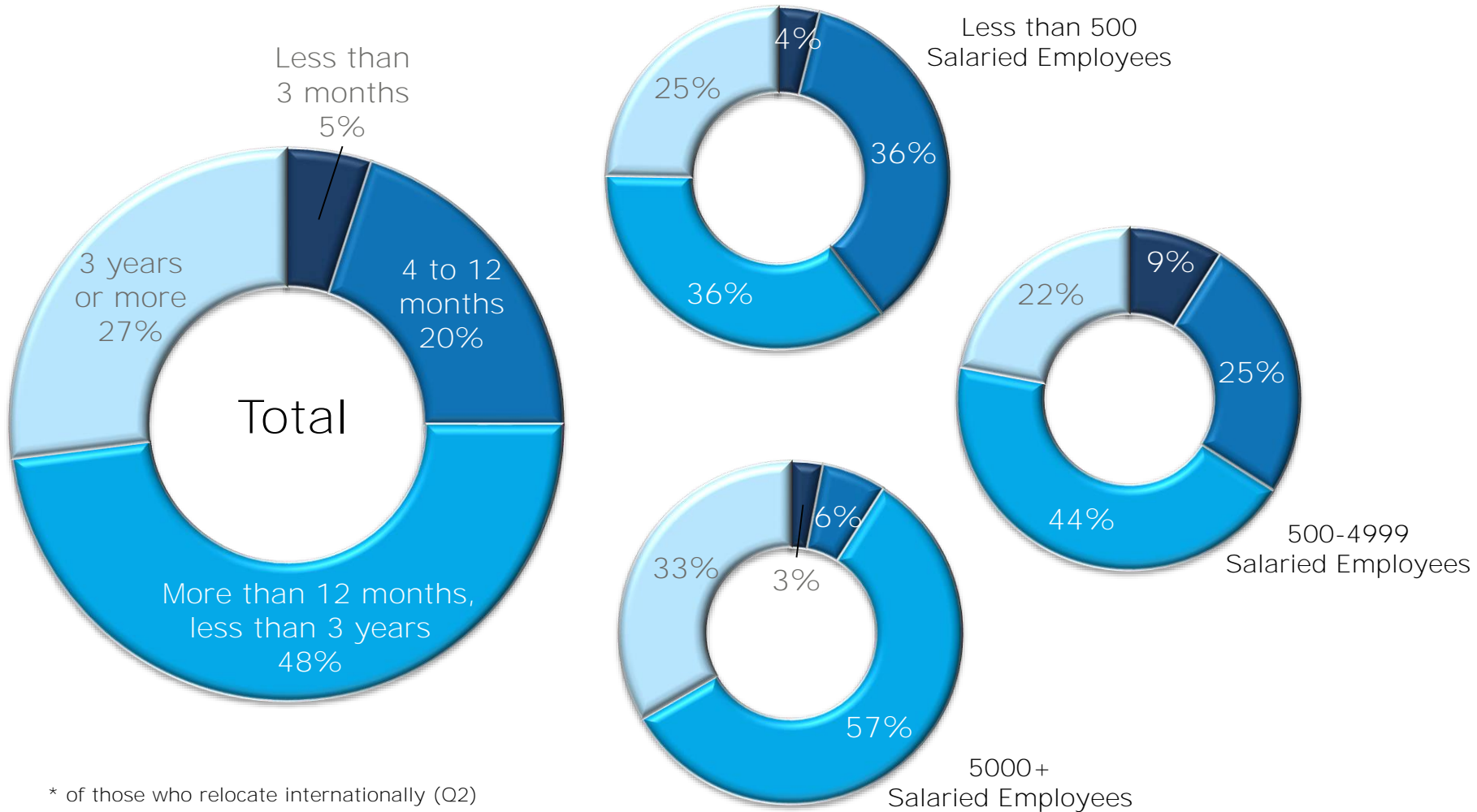
Q.43b – Compared to 2015, Do You Anticipate that the Number of Employees Your Company Will Relocate Internationally During 2016 Will...\*



\* of those who relocate internationally (Q2)

# International

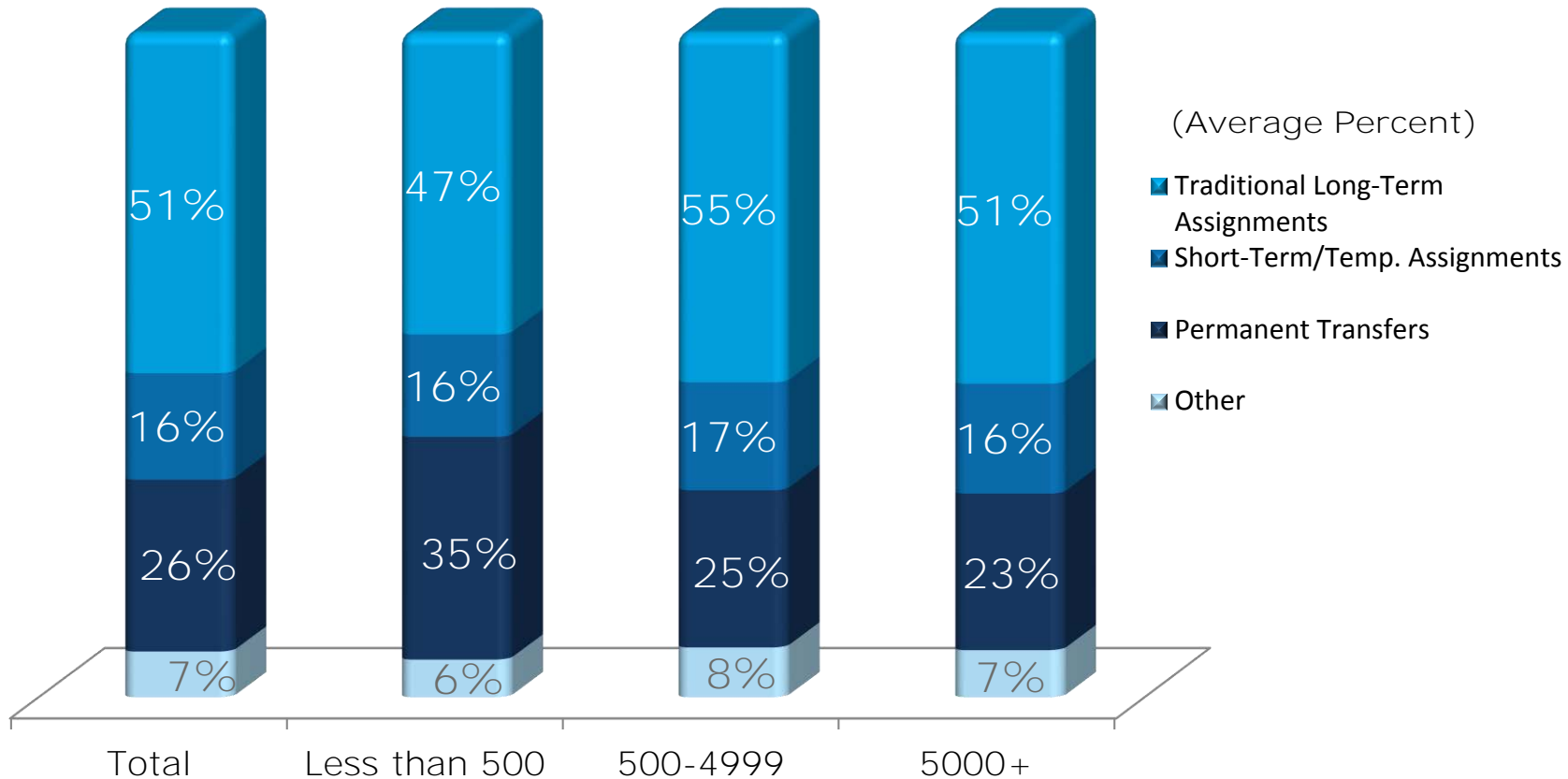
Q. 43c – What is the Typical International Relocation Assignment Duration for Employees at Your Company?\*



# International

Q.43d – In 2015, What Percentage of Your International Relocations Were...\*

By Company Size (Salaried Employees)

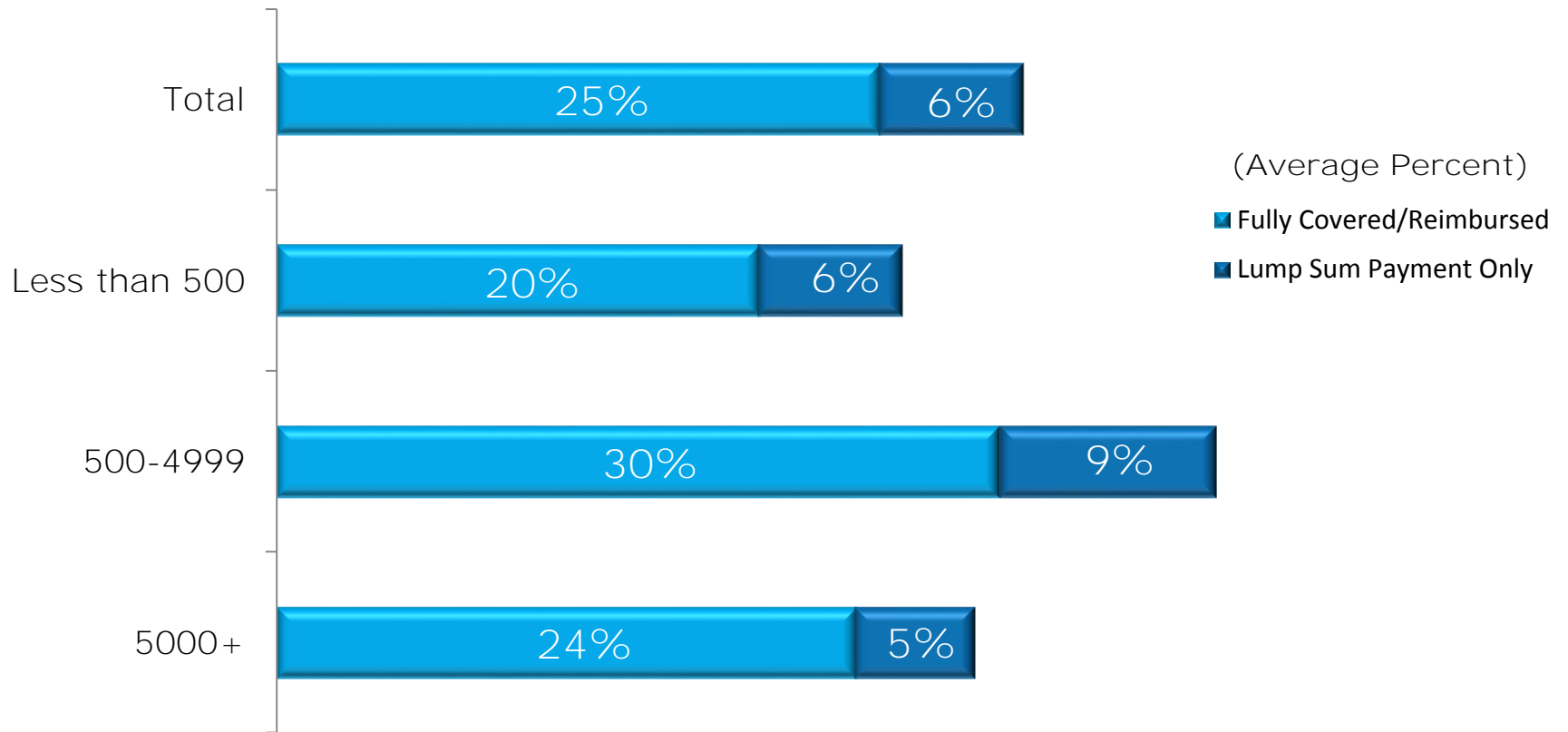


\* of those who relocate internationally (Q2) / excludes those who "don't know"

# International

Q.43d – In 2015, What Percentage of Your International Relocations Were...\*

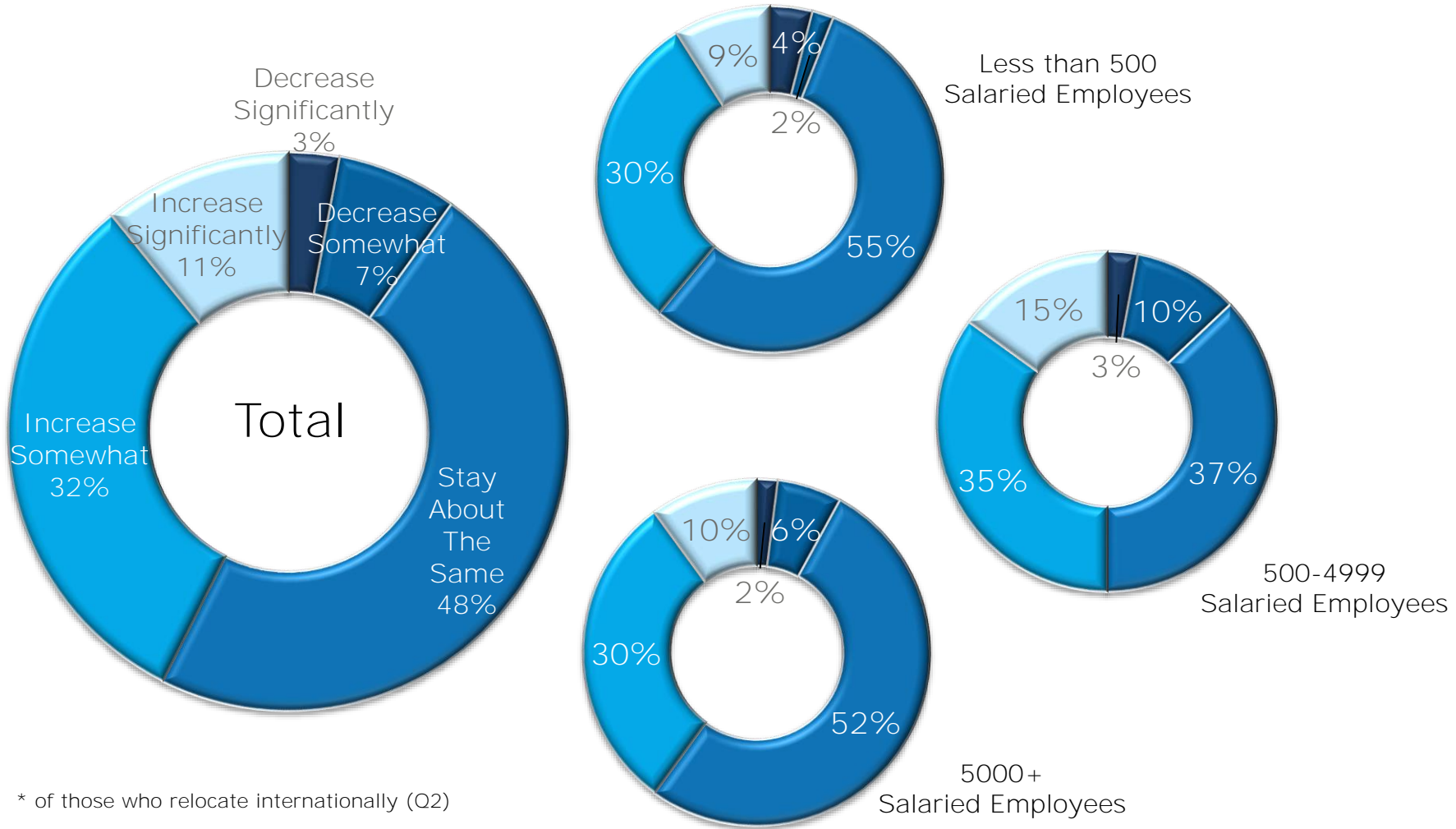
By Company Size (Salaried Employees)



\* of those who relocate internationally (Q2) / excludes those who "don't know"

# International

*Q.43e – Compared to 2015, Do You Expect the Number of International Short-Term/Temporary Assignments (Less than 12 Months) in 2016 to...\**



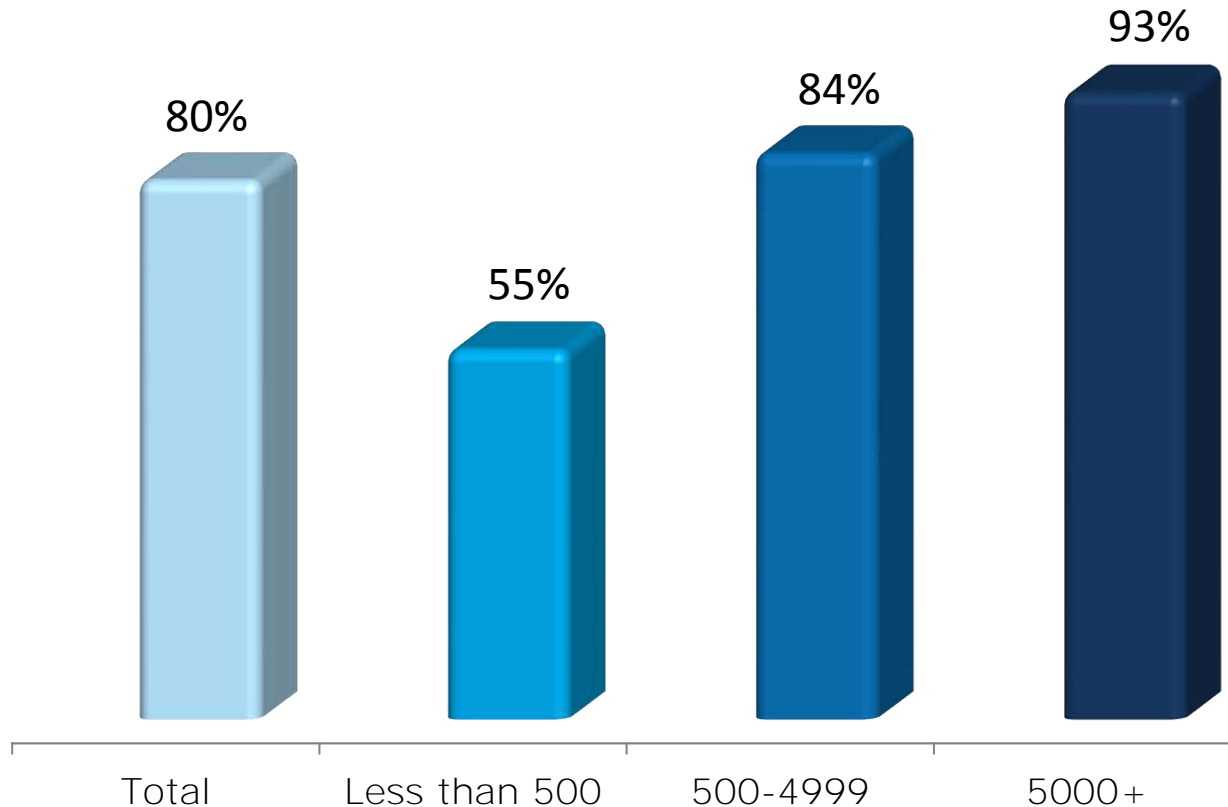
\* of those who relocate internationally (Q2)



# International

*Q.43f – Companies with a Formal Policy for: International Relocation Assignments\* (traditional length 1-3 years)*

By Company Size (Salaried Employees)

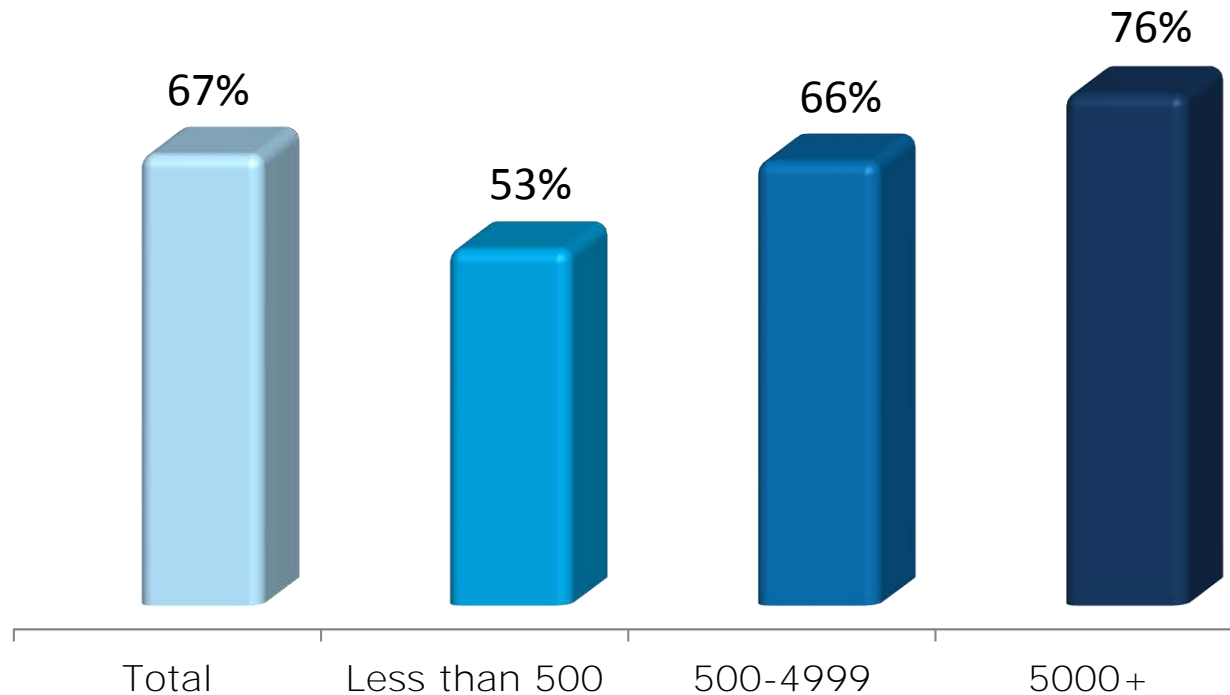


\* of those who relocate internationally (Q2)  
% of companies answering "Yes"

# International

Q.43f – Companies with a Formal Policy for:  
Permanent Transfers\* (international)

By Company Size (Salaried Employees)

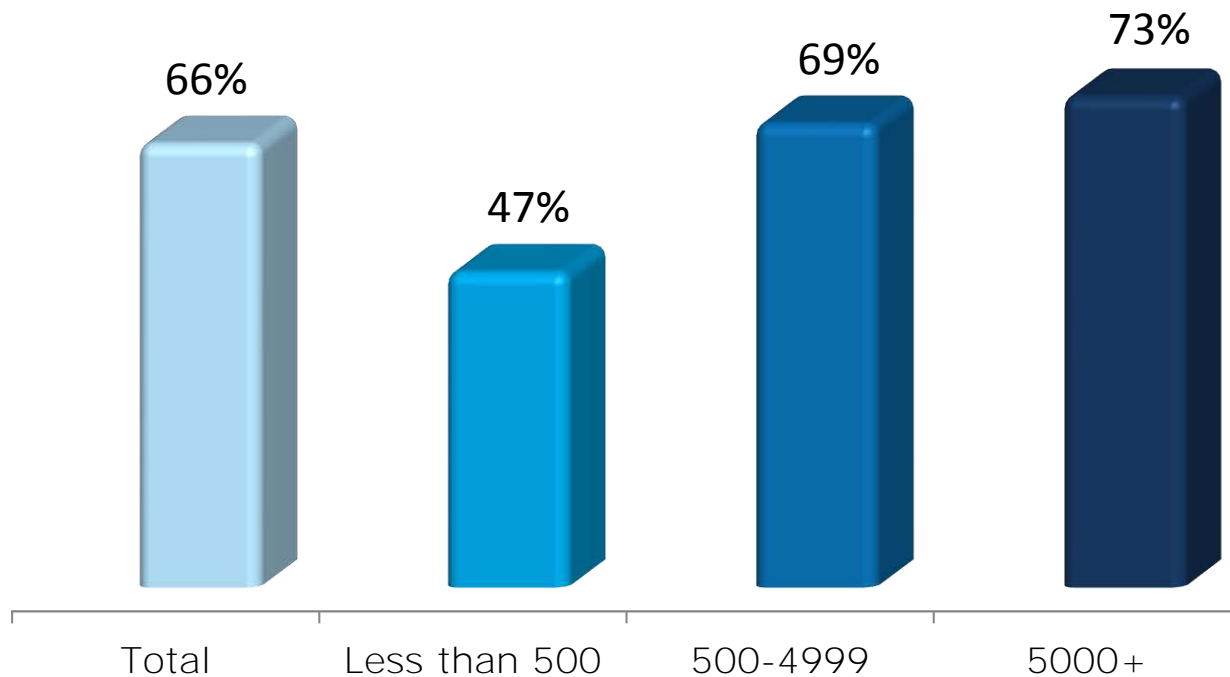


\* of those who relocate internationally (Q2)  
% of companies answering "Yes"

# International

Q.43f – Companies with a Formal Policy for:  
Localization\* (international)

By Company Size (Salaried Employees)

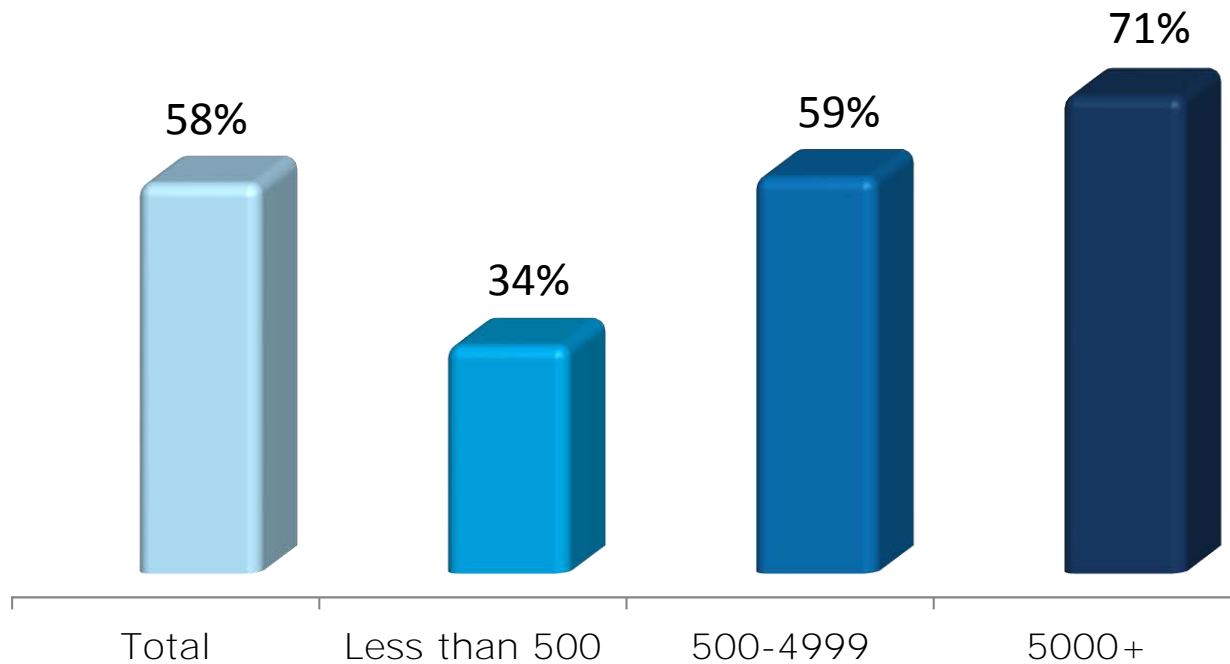


\* of those who relocate internationally (Q2)  
% of companies answering "Yes"

# International

Q.43f – Companies with a Formal Policy for:  
Intra-Regional Assignments\* (international)

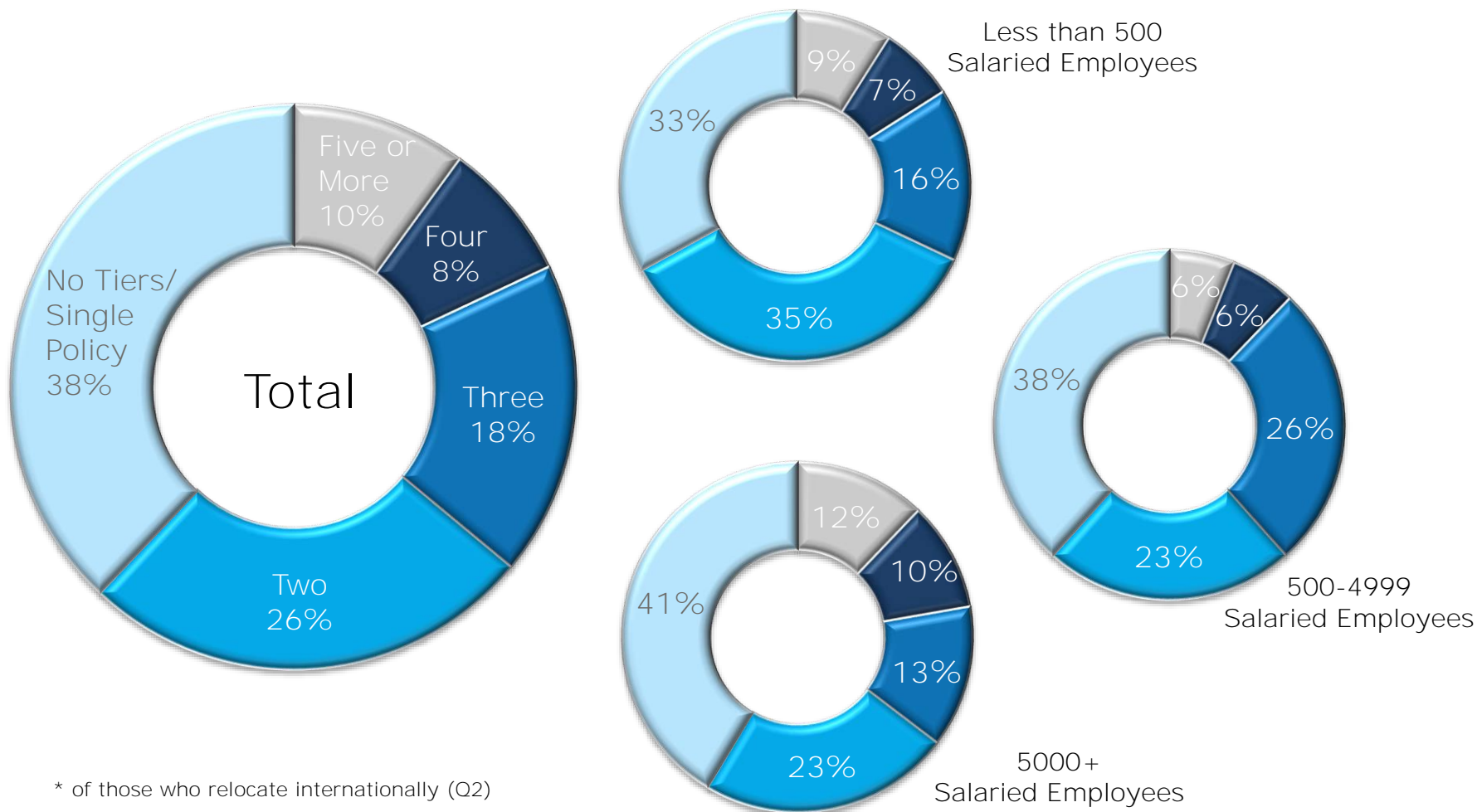
By Company Size (Salaried Employees)



\* of those who relocate internationally (Q2)  
% of companies answering "Yes"

# International

Q. 43g-1 – Does Your Company Have Different Tiers (or Levels) Within Its International Relocation Policy?\*

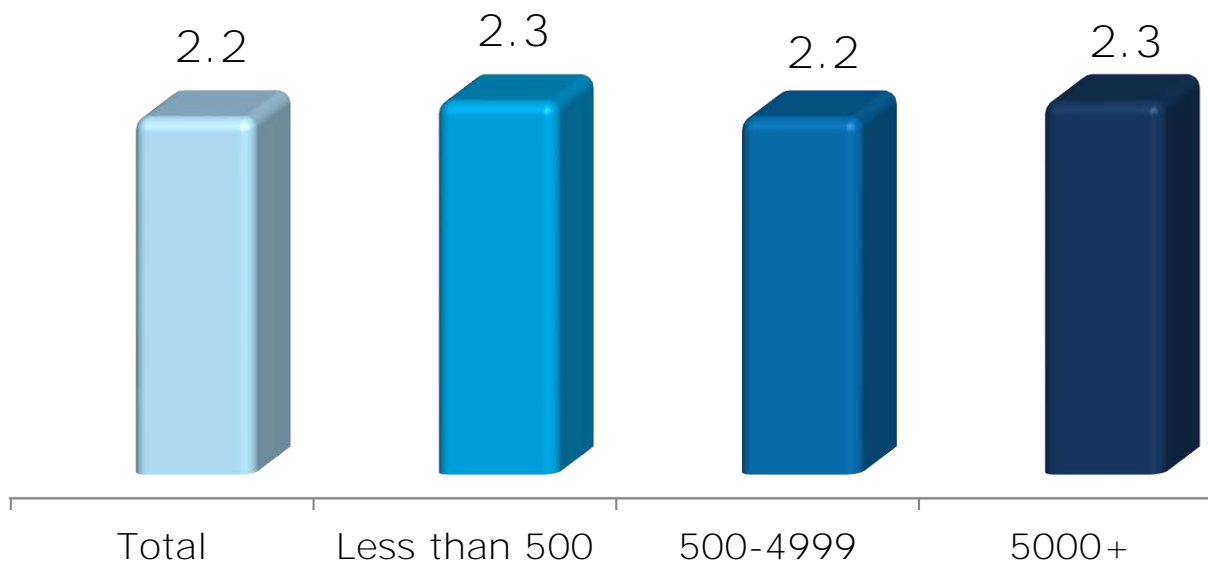


\* of those who relocate internationally (Q2)

# International

Q. 43g-1 – Average Number of Tiers (or Levels) Within International Relocation Policy\*

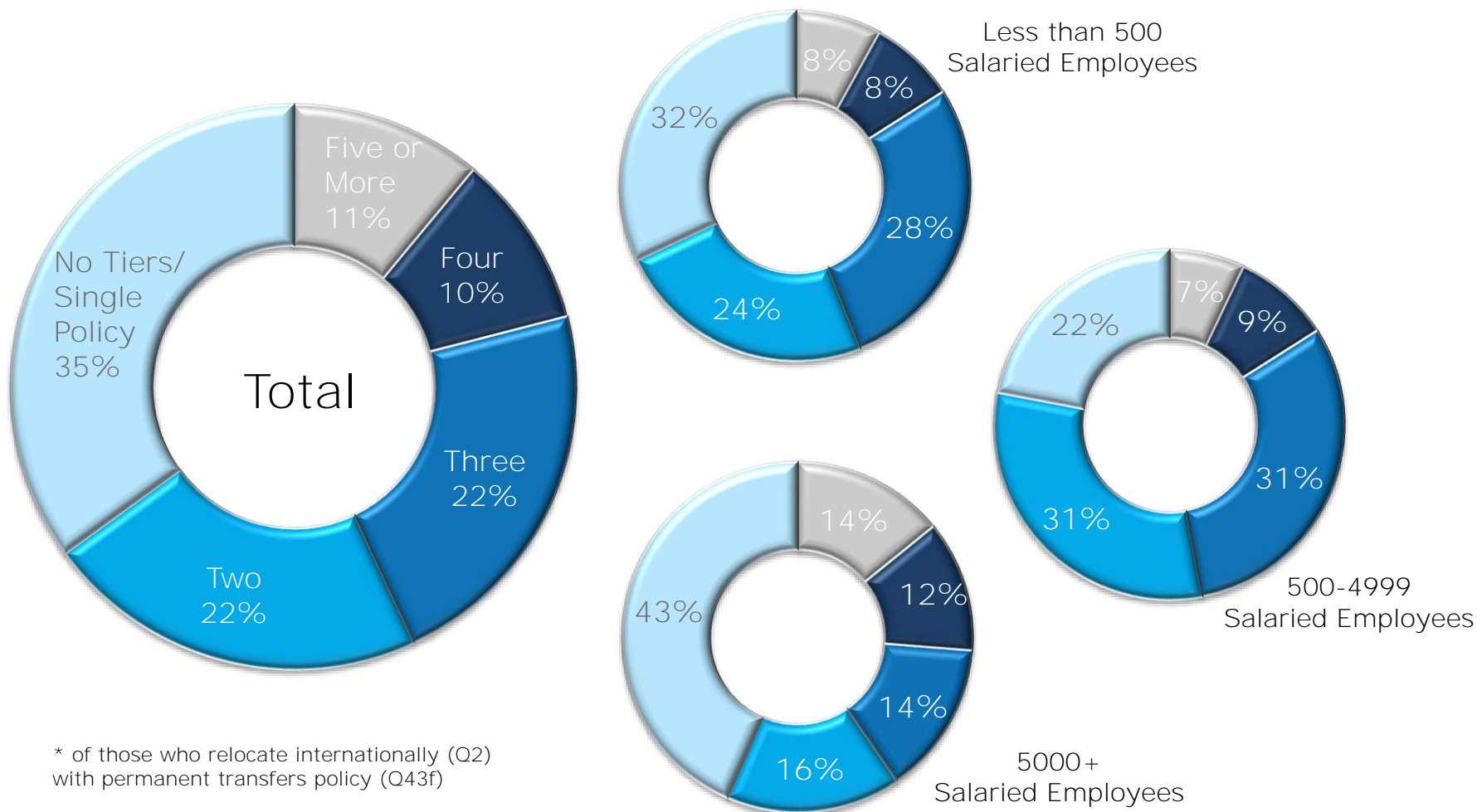
By Company Size (Salaried Employees)



\* of those who relocate internationally (Q2) with tiers/levels (Q43g-1)

# International

Q.43g-2 – Does Your Company Have Different Tiers (or Levels) Within Its Permanent Transfers (International) Policy?\*

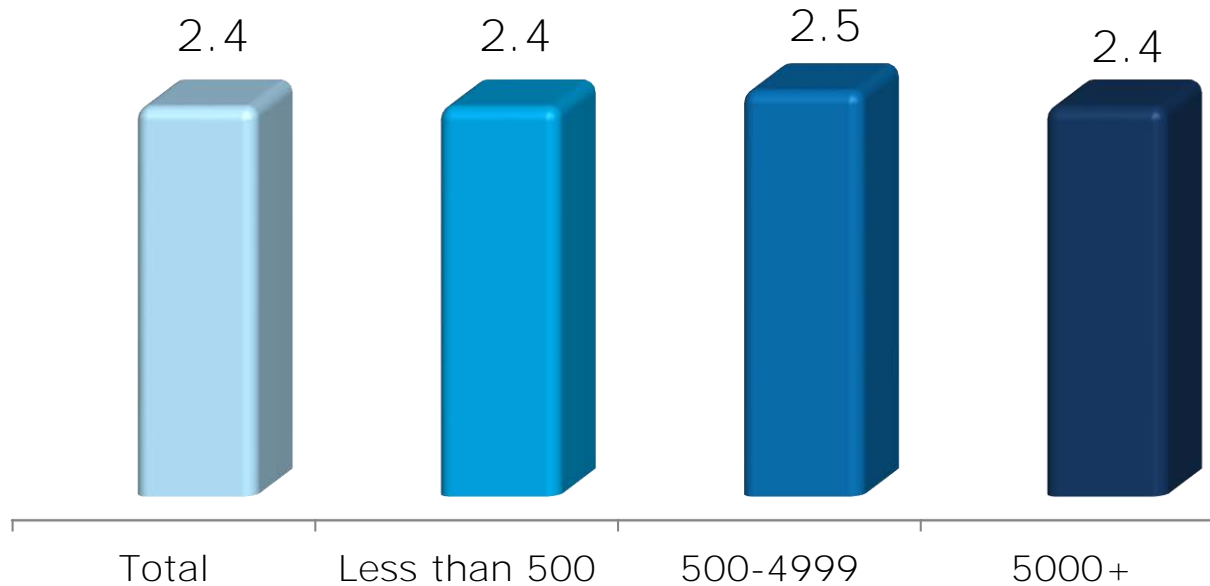


\* of those who relocate internationally (Q2) with permanent transfers policy (Q43f)

# International

Q.43g-2 – Average Number of Tiers (or Levels) Within Permanent Transfers (International) Policy\*

By Company Size (Salaried Employees)

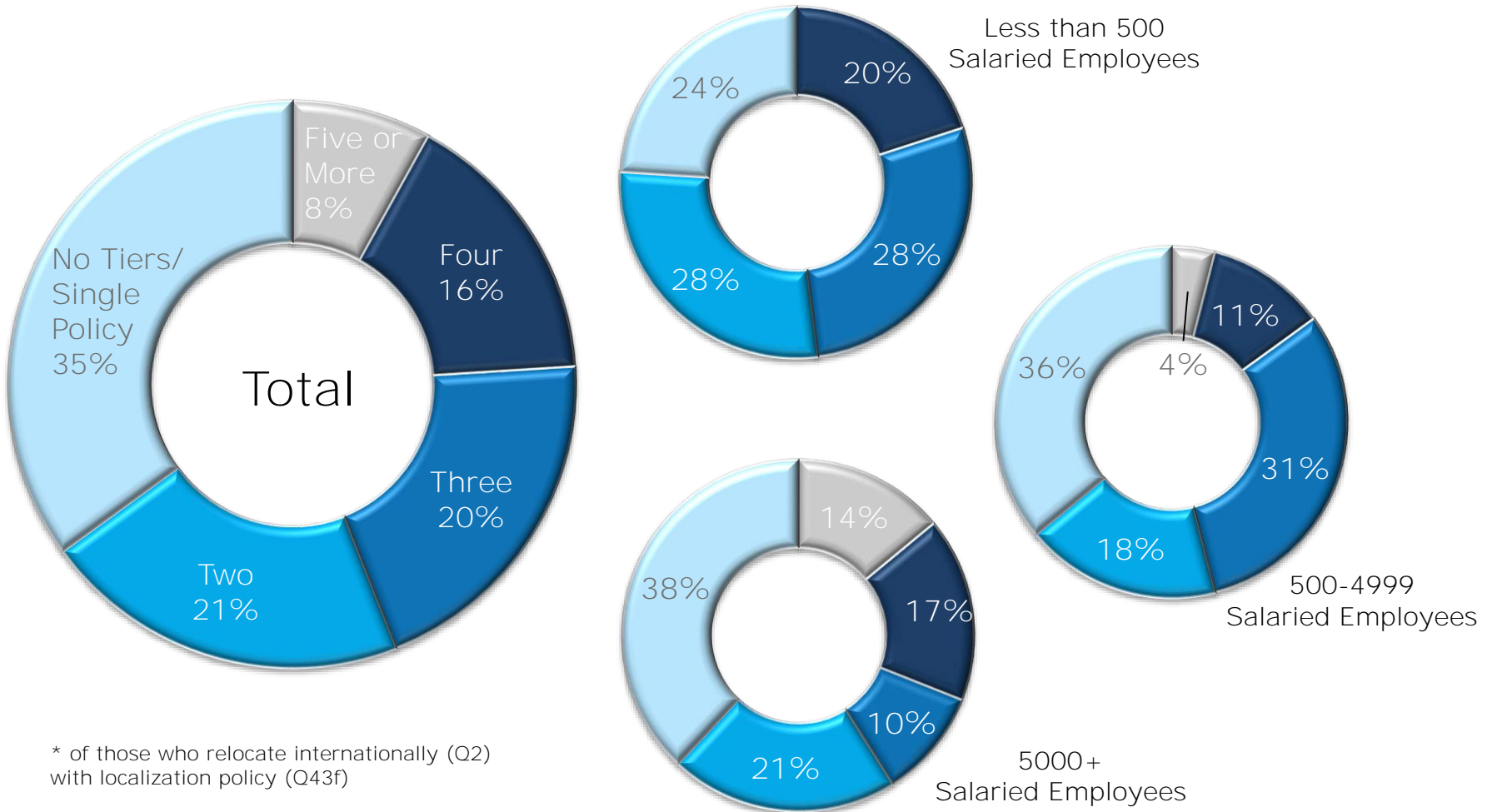


\* of those who relocate internationally (Q2) with permanent transfers policy (Q43f) with tiers/levels (Q43g-2)



# International

Q. 43g-3 – Does Your Company Have Different Tiers (or Levels) Within Its Localization (International) Policy?\*

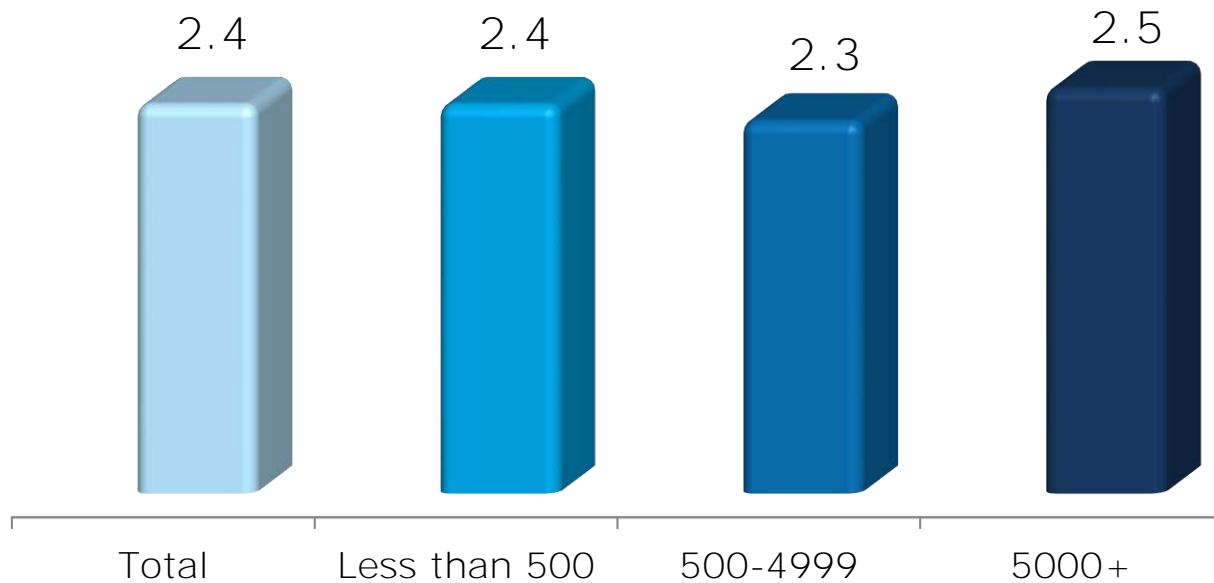


\* of those who relocate internationally (Q2) with localization policy (Q43f)

# International

*Q.43g-3 – Average Number of Tiers (or Levels) Within Its Localization (International) Policy\**

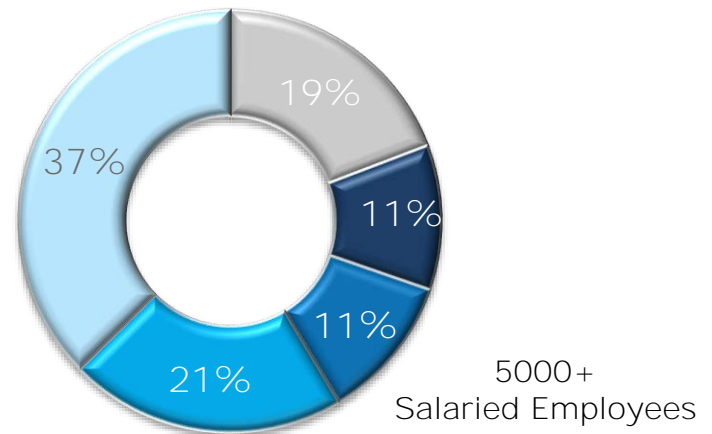
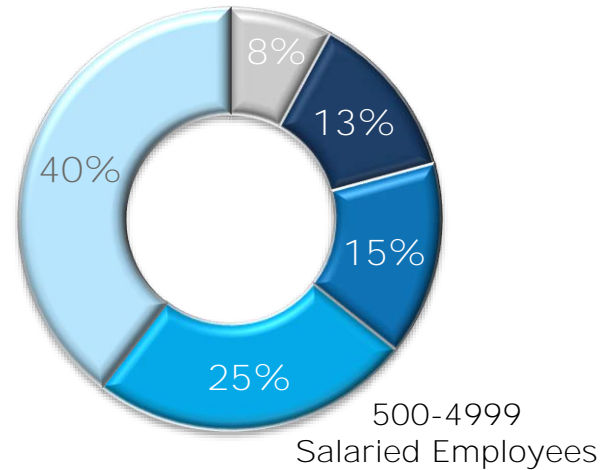
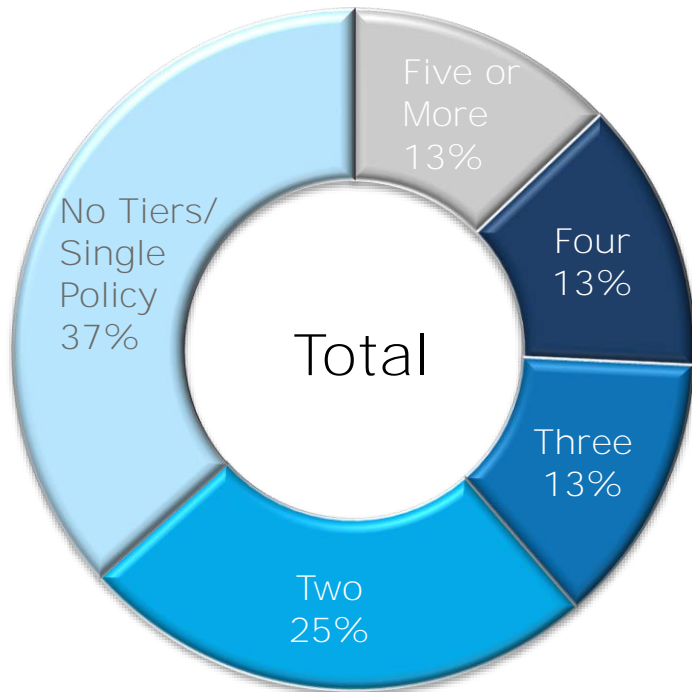
By Company Size (Salaried Employees)



\* of those who relocate internationally (Q2) with localization policy (Q43f) with tiers/levels (Q43g-3)

# International

Q.43g-4 – Does Your Company Have Different Tiers (or Levels) Within Its Intra-Regional Assignments (International) Policy?\*

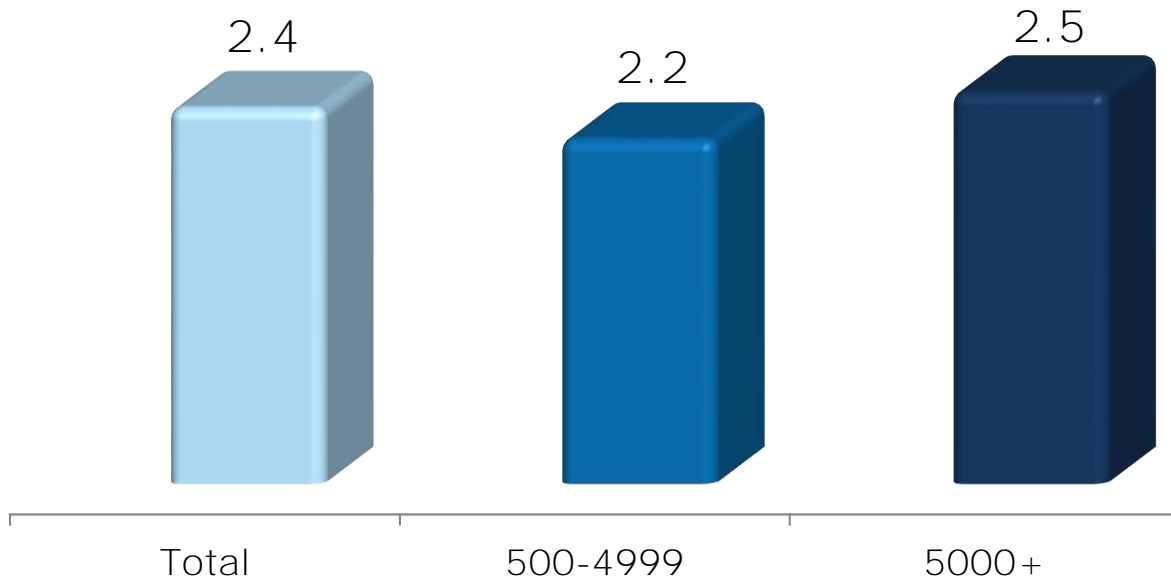


\* of those who relocate internationally (Q2) with intra-regional assignments policy (Q43f) / Less than 500 not reportable due to low base size of responses

# International

Q.43g-4 – Average Number of Tiers (or Levels) Within Intra-Regional Assignments (International) Policy\*

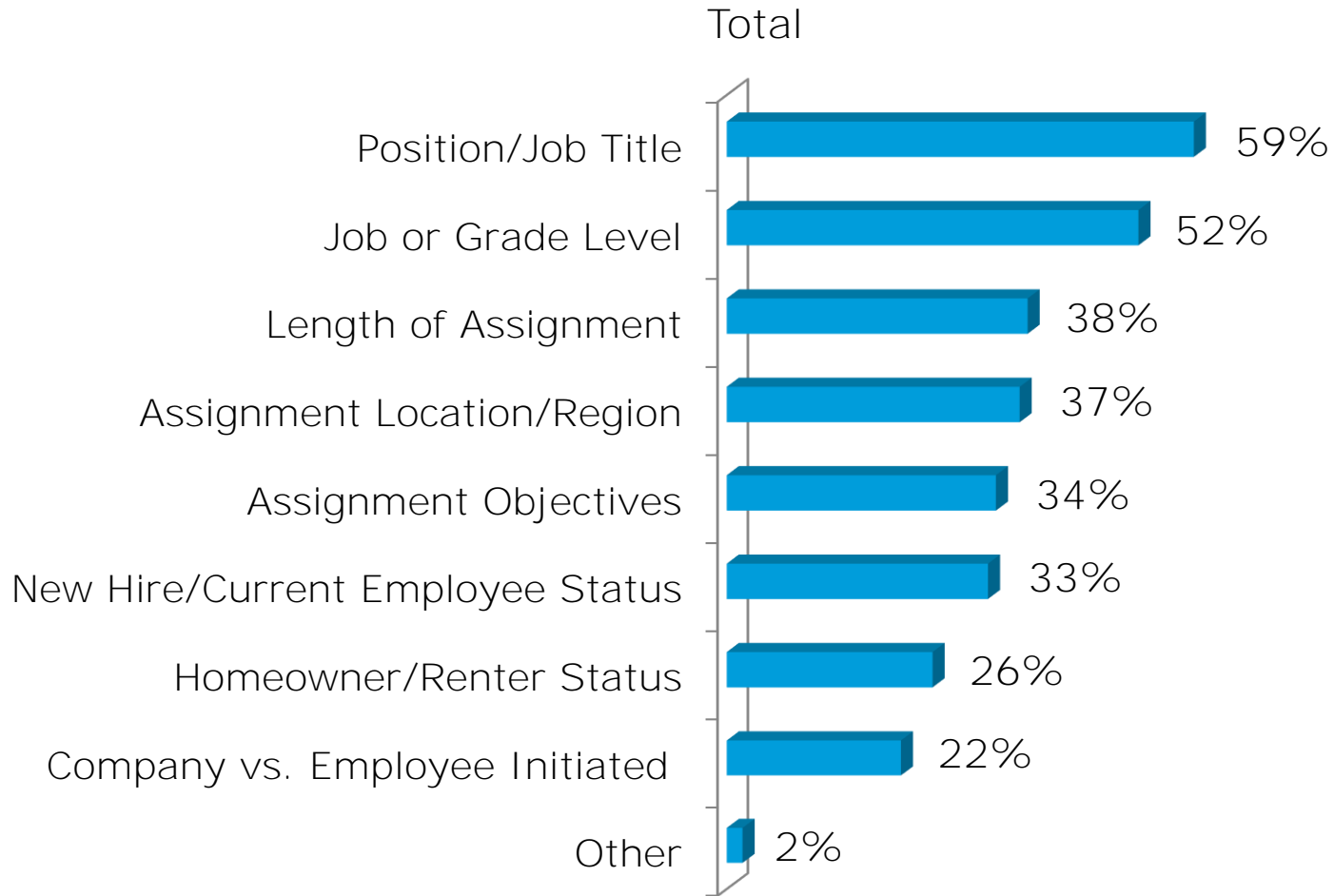
By Company Size (Salaried Employees)



\* of those who relocate internationally (Q2) with intra-regional assignments policy (Q43f) with tiers/levels (Q43g-4) / Less than 500 not reportable due to low base size of responses

# International

Q.43h – What Are Your Different Tiers (or Levels) Based On?\*



\* of those who relocate internationally (Q2) with tiers/levels (Q43g-1)

# International

Q.43h – What Are Your Different Tiers (or Levels) Based On?\*

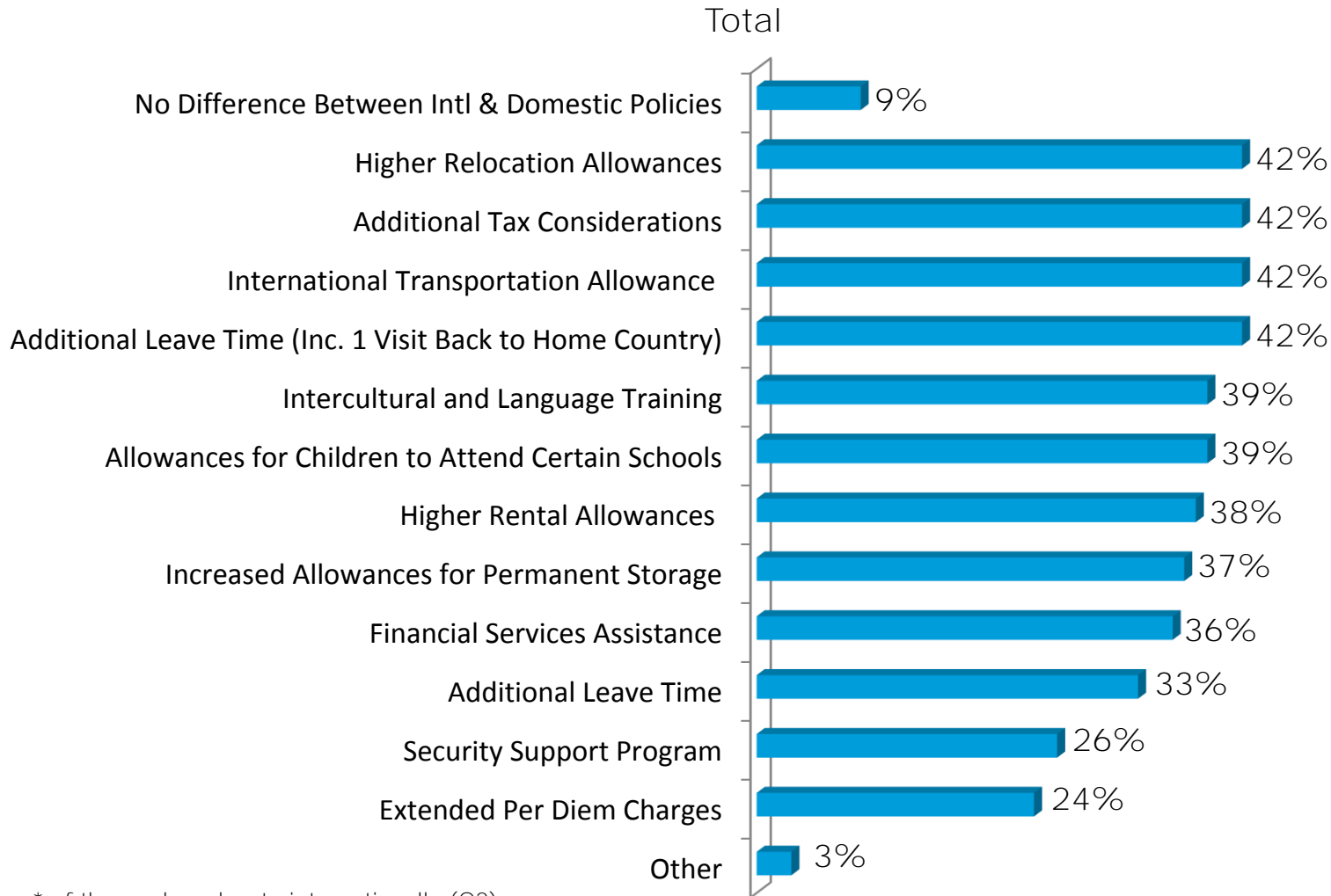
By Company Size (Salaried Employees)

Bases for International Policy Tiers (or Levels)	Total	Less than 500	500-4999	5000+
Position/Job Title	59%	55%	63%	58%
Job or Grade Level (i.e. staff, management, professional, etc.)	52%	45%	50%	57%
Length of Assignment	38%	31%	40%	40%
Assignment Location/Region	37%	38%	45%	30%
Assignment Objectives (i.e. developmental, etc.)	34%	34%	28%	38%
New Hire/Current Employee Status	33%	21%	33%	40%
Homeowner/Renter Status	26%	34%	25%	23%
Company vs. Employee Initiated Relocation	22%	24%	18%	25%
Other	2%	0%	0%	4%

\* of those who relocate internationally (Q2) with tiers/levels (Q43g-1)

# International

Q.43i – Comparing Your International Relocation Policy to Your Domestic Relocation Policy, Does Your Company's International Relocation Policy Offer...\*



\* of those who relocate internationally (Q2)

# International

*Q.43i – Comparing Your International Relocation Policy to Your Domestic Relocation Policy, Does Your Company’s International Relocation Policy Offer...\**

By Company Size (Salaried Employees)

International Relocation Policy Differences from Domestic	Total	Less than 500	500-4999	5000+
No Difference Between International and Domestic Relocation Policies	9%	17%	9%	5%
Higher Relocation Allowances	42%	36%	43%	46%
Additional Tax Considerations	42%	25%	35%	57%
International Transportation Allowance (i.e. rental car, commuting costs, etc.)	42%	40%	38%	46%
Additional Leave Time (Inc. 1 Visit Back to Home Country)	42%	40%	25%	55%
Intercultural and Language Training	39%	13%	32%	59%
Allowances for Children to Attend Certain Schools	39%	15%	29%	59%
Higher Rental Housing Allowance	38%	23%	41%	45%
Increased Allowances for Permanent Storage	37%	36%	31%	43%
Financial Services Assistance (i.e. bank account setup, specialized compensation arrangements)	36%	28%	35%	41%
Additional Leave Time	33%	34%	34%	33%
Security Support Program	26%	9%	22%	38%
Extended Per Diem Charges	24%	21%	28%	23%
Other	3%	4%	1%	4%

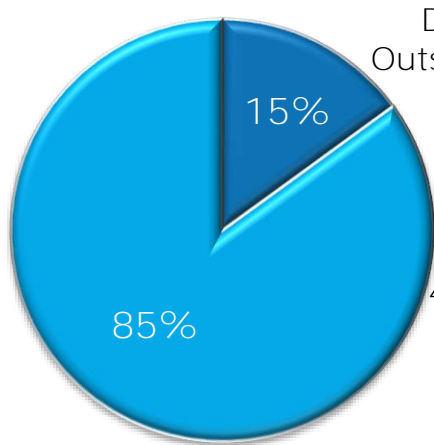
\* of those who relocate internationally (Q2)



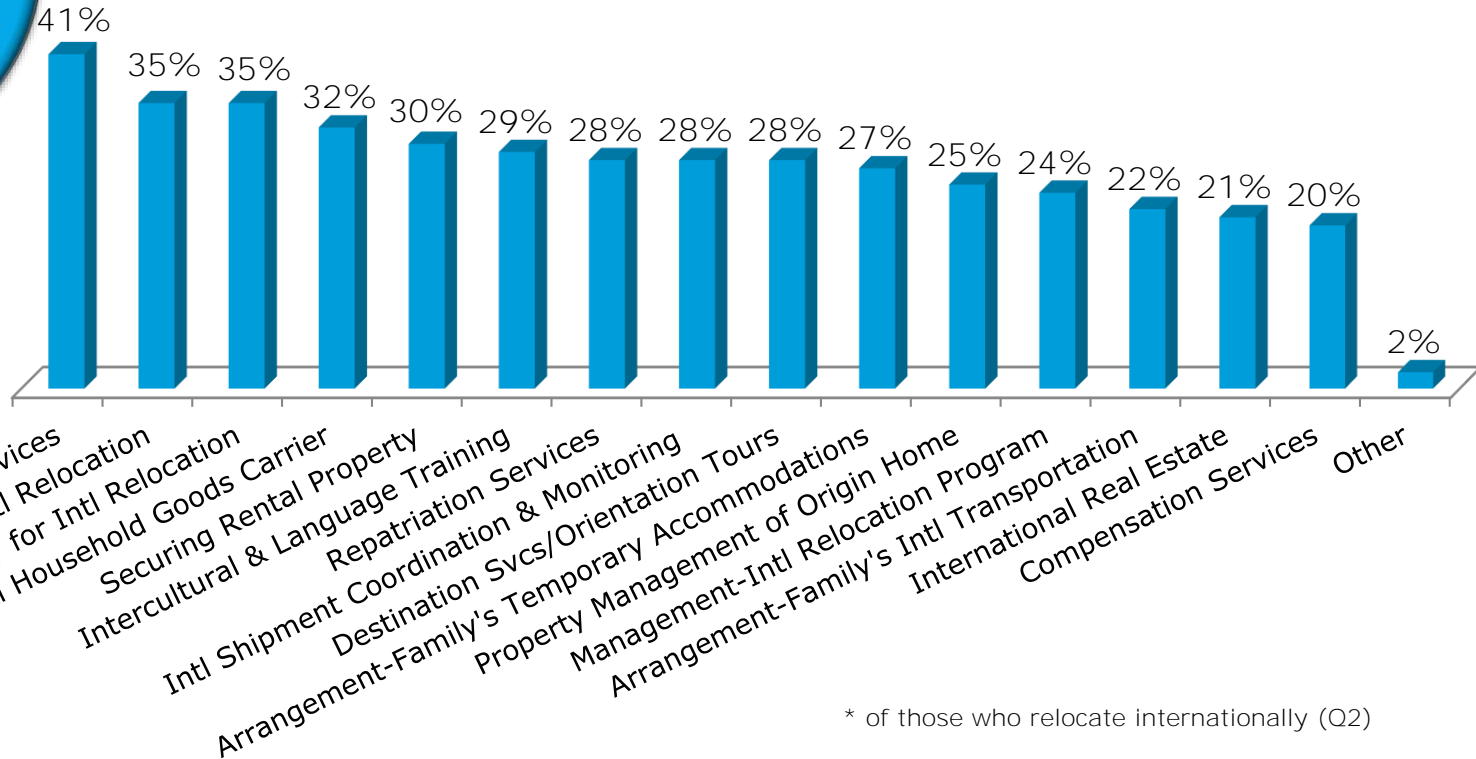


# International

Q. 43j – Respondents were given a list of possible outsourced international relocation services in 2015 – the answers received indicate that...\*



Total  
Services Outsourced



\* of those who relocate internationally (Q2)

# International

Q.43j – International Services Outsourced to a Relocation Service, HRO or Brokerage Firm in 2015\* - By Company Size (Salaried Employees)

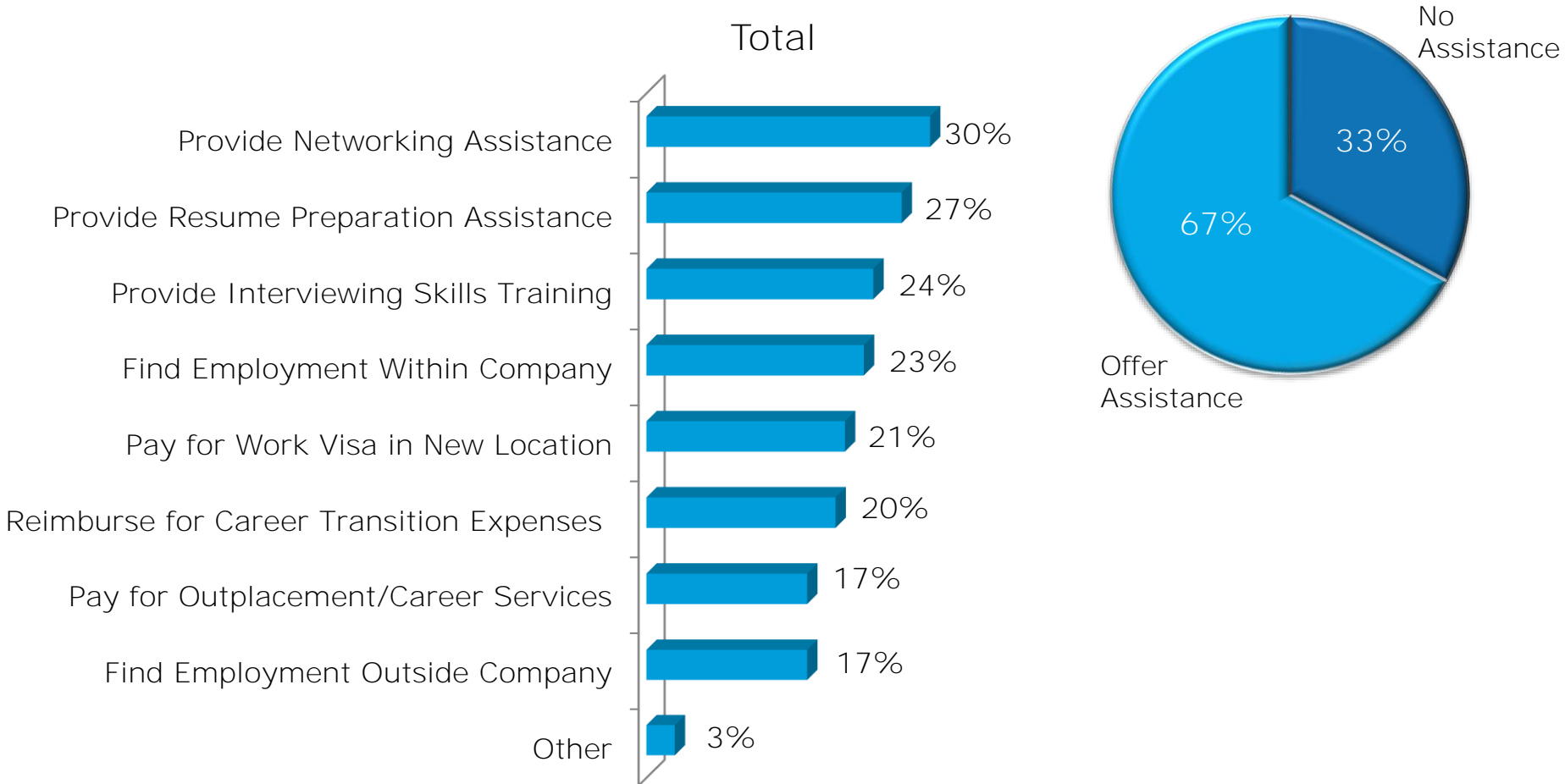
International Services Outsourced in 2015	Total	Less than 500	500-4999	5000+
Did Not Use a Relocation Service, HRO or Brokerage Firm for Intl Relocation Services in 2015	15%	25%	12%	13%
Visa & Immigration Services	41%	38%	37%	46%
Counseling About the Planning & Details of Relocating Internationally	35%	26%	35%	40%
Counseling About Company Policy Concerning International Relocation	35%	26%	41%	35%
Contract of Household Goods Carrier for International Shipping	32%	19%	32%	39%
Securing Rental Property in Host Country	30%	11%	31%	39%
Intercultural and Language Training	29%	13%	22%	43%
Repatriation Services	28%	19%	24%	36%
Coordination and Monitoring of International Shipment	28%	13%	25%	39%
Destination Services/Orientation Tours in Host Country	28%	17%	18%	41%
Arrangement of Family's Temporary Accommodations	27%	21%	25%	32%
Property Management of Home at Origin	25%	17%	18%	35%
Management of International Relocation Program	24%	19%	22%	29%
Arrangement of Family's International Transportation	22%	15%	24%	24%
International Real Estate (Sales/Marketing and/or Purchase)	21%	17%	21%	23%
Compensation Services (i.e. Payroll Arrangements, Tax Compliance, etc.)	20%	17%	28%	16%
Other	2%	0%	1%	4%

\* of those who relocate internationally (Q2)



# International

Q. 43k – Method of Employment Assistance for Internationally Relocated Employee's Spouse or Partner\*



\* of those who relocate internationally (Q2)

# International

## Q. 43k – Method of Employment Assistance for Internationally Relocated Employee’s Spouse or Partner\*

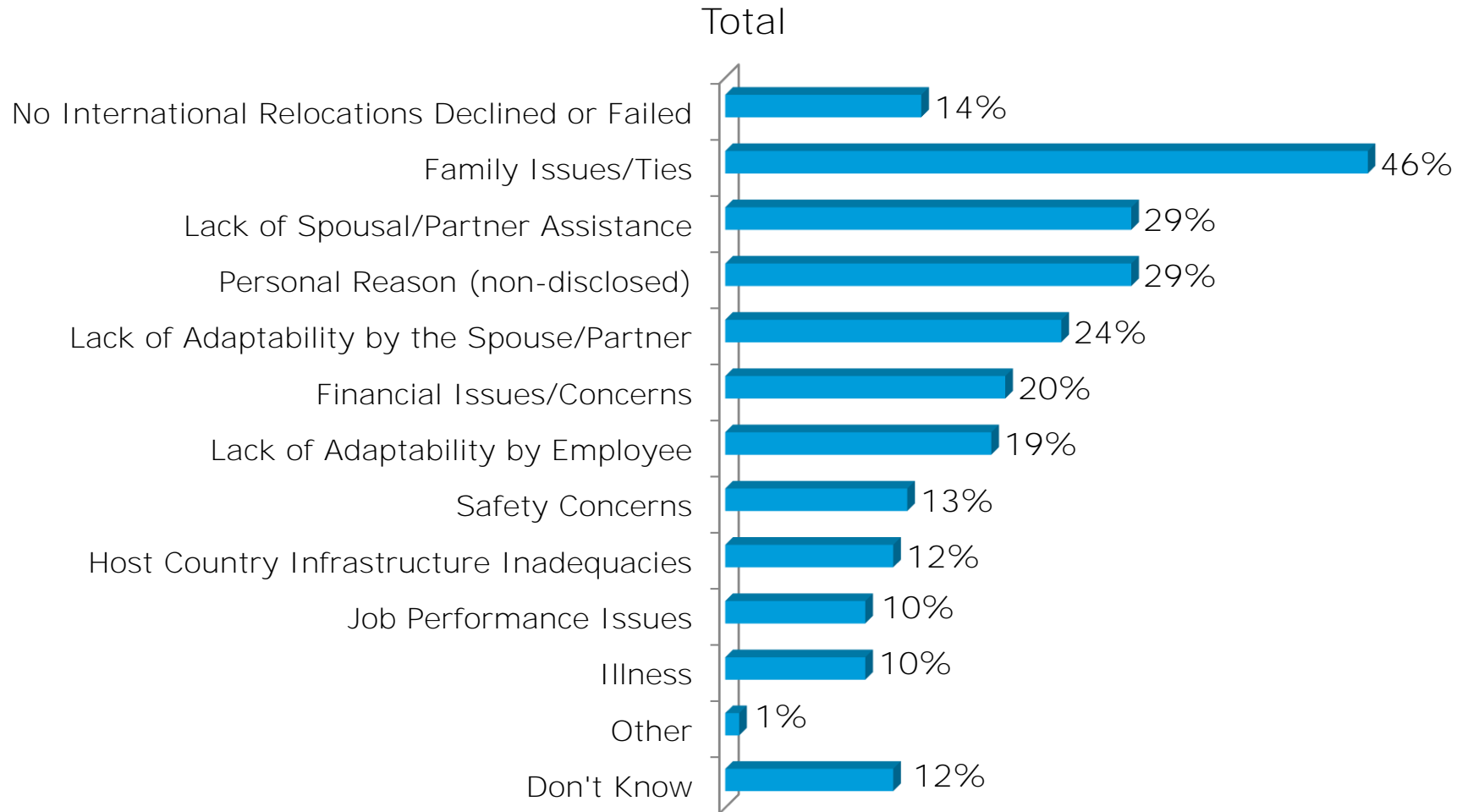
By Company Size (Salaried Employees)

Spousal/Partner Employment Assistance – Intl	Total	Less than 500	500-4999	5000+
No Assistance	33%	38%	31%	33%
Provide Networking Assistance	30%	26%	31%	32%
Provide Resume Preparation Assistance	27%	26%	26%	27%
Provide Interviewing Skills Training	24%	19%	26%	24%
Find Employment Within Company	23%	15%	35%	18%
Pay for Work Visa in New Location	21%	15%	25%	22%
Reimburse for Career Transition Expenses (i.e. interview trips, certifications, etc.)	20%	17%	21%	20%
Pay for Outplacement/Career Services from an Outside Firm	17%	11%	18%	20%
Find Employment Outside Company	17%	17%	26%	10%
Other	3%	2%	3%	4%

\* of those who relocate internationally (Q2)

# International

Q.43I – In 2015, Reasons Cited for an Employee Declining an International Relocation or for an International Relocation to Fail\*



\* of those who relocate internationally (Q2)

# International

Q. 431 – In 2015, Reasons Cited for an Employee Declining an International Relocation or for an International Relocation to Fail\*

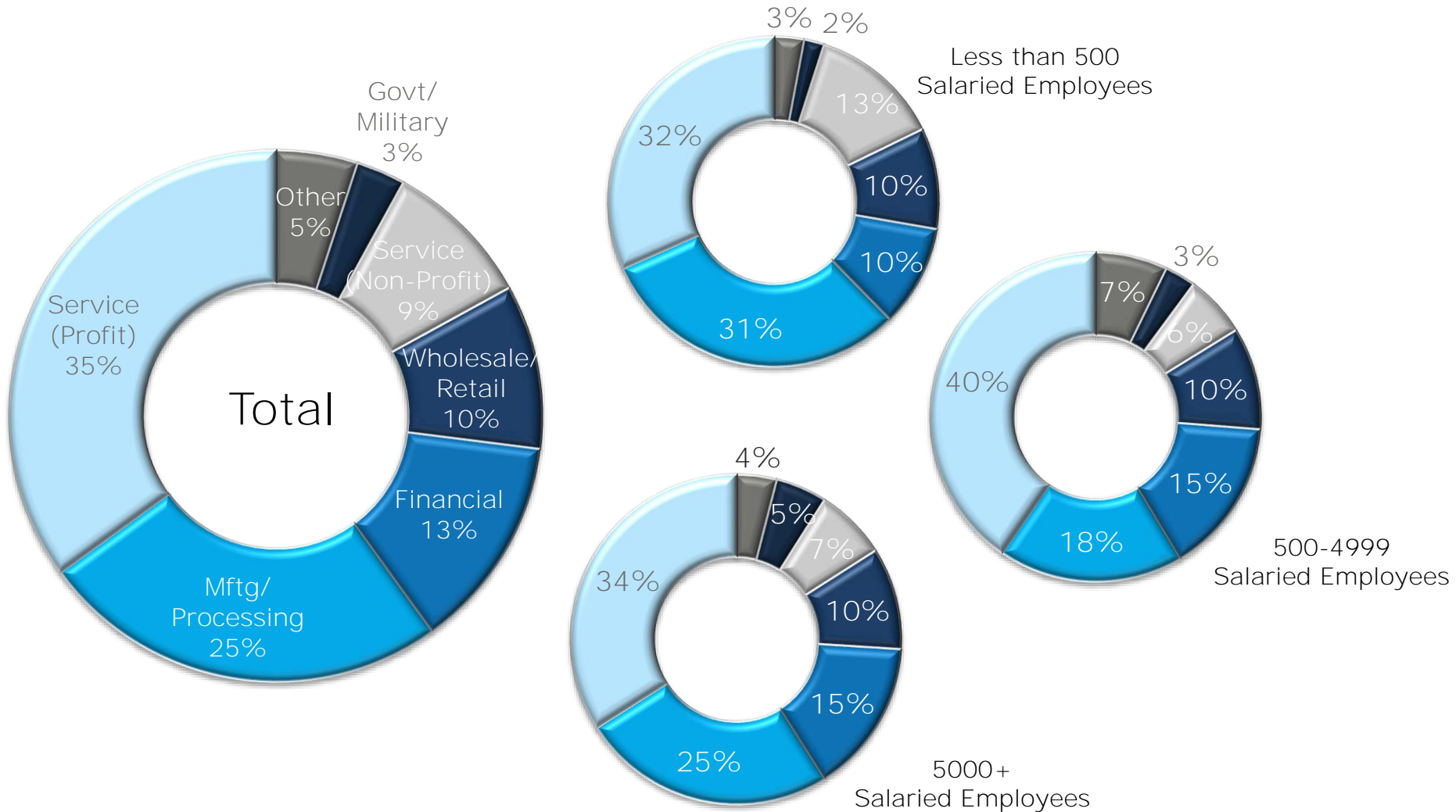
By Company Size (Salaried Employees)

Reasons Cited for Declining/Failed Intl Relocation	Total	Less than 500	500-4999	5000+
No International Relocations Declined or Failed	14%	25%	13%	9%
Family Issues/Ties	46%	47%	41%	48%
Lack of Spousal/Partner Assistance	29%	21%	28%	35%
Personal Reason (Non-Disclosed)	29%	30%	28%	29%
Lack of Adaptability by the Spouse/Partner	24%	21%	26%	23%
Financial Issues/Concerns	20%	13%	21%	23%
Lack of Adaptability by Employee	19%	21%	16%	19%
Safety Concerns (i.e. war/terrorism/political unrest/etc.)	13%	6%	18%	14%
Host Country Infrastructure Inadequacies	12%	8%	18%	10%
Job Performance Issues	10%	4%	15%	10%
Illness	10%	8%	15%	7%
Other	1%	0%	1%	2%
Don't Know	12%	6%	13%	14%

\* of those who relocate internationally (Q2)

# Corporate/Respondent Profile

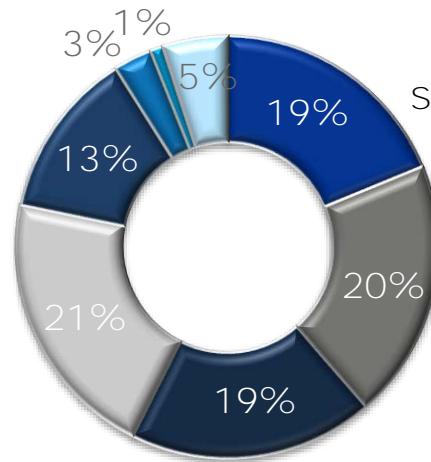
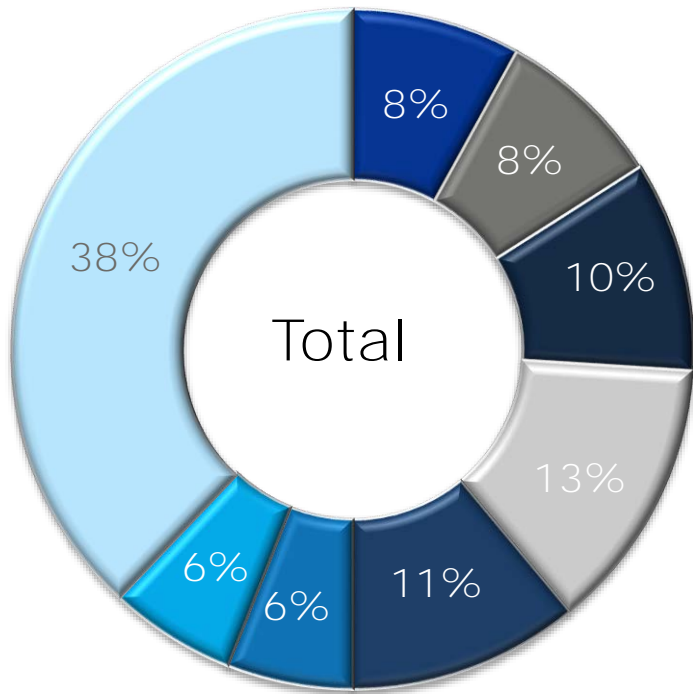
Q.44 – Business Classifications of Companies Participating



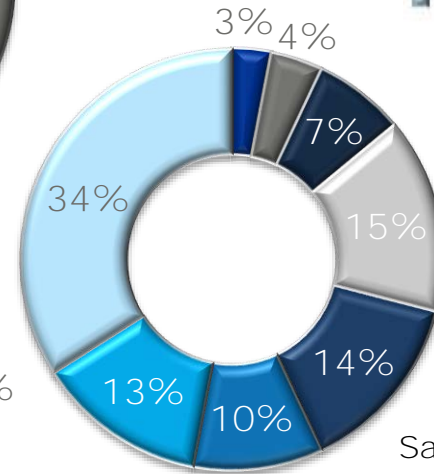
# Corporate/Respondent Profile

Q.45 – Participating Companies Annual Sales for 2015\*

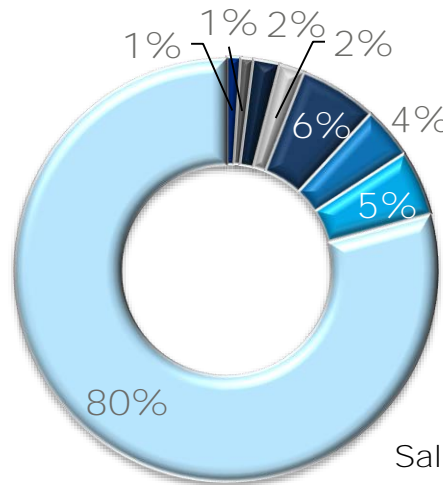
- < \$25 million
- \$26-\$50 million
- \$51-\$99 million
- \$100-\$249 million
- \$250-\$499 million
- \$500-\$749 million
- \$750 million-\$1 billion
- > \$1 billion



Less than 500 Salaried Employees



500-4999 Salaried Employees



5000+ Salaried Employees

\* excludes blank responses

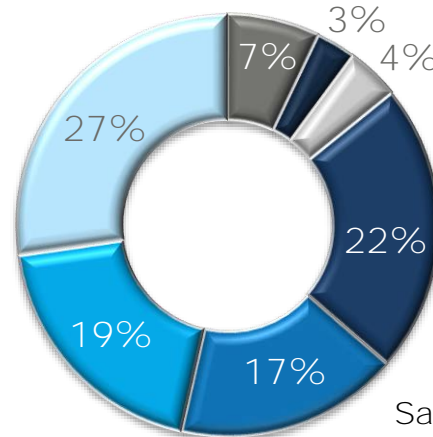
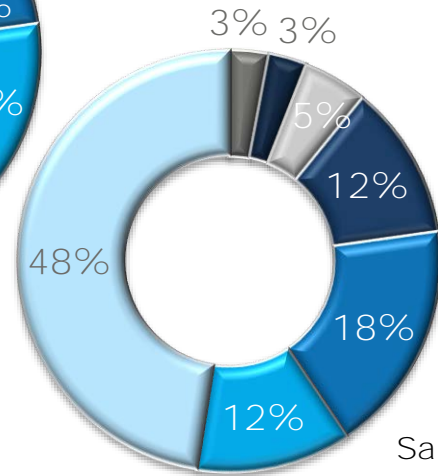
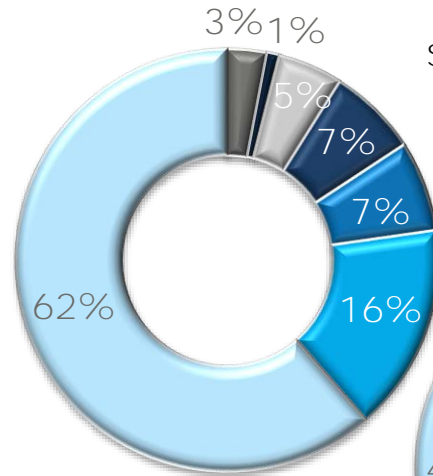
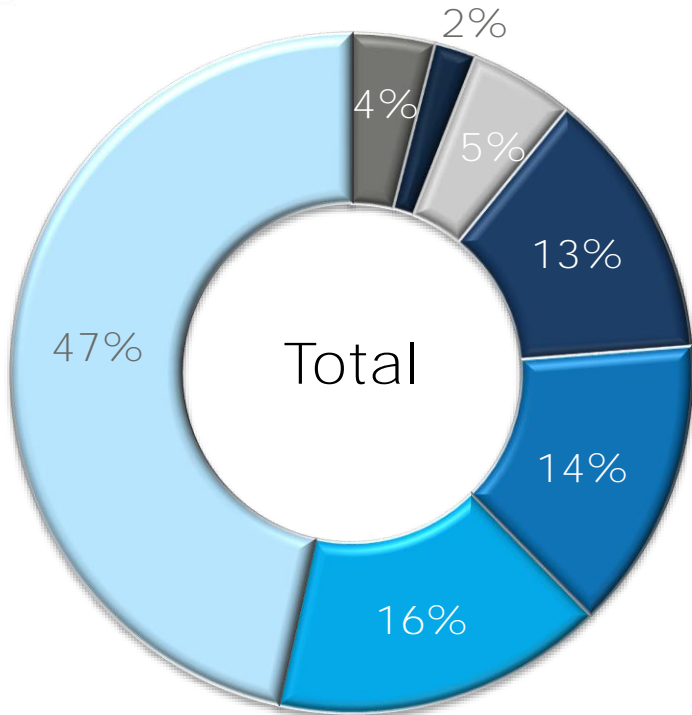




# Corporate/Respondent Profile

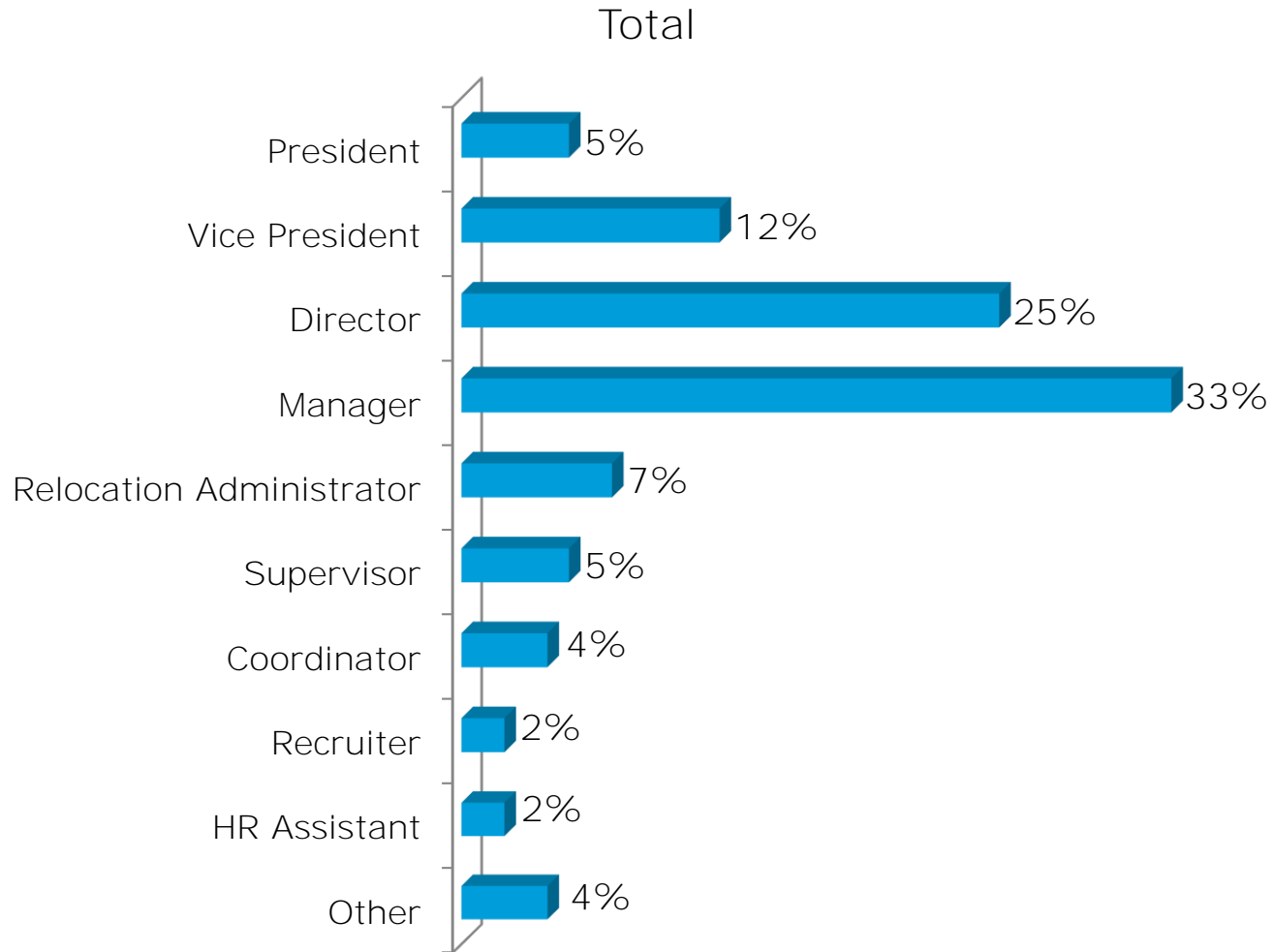
Q. 46 - Departmental Function

- Human Resources/Personnel - General/Administration
- Human Resources/Personnel - Compensation & Benefits
- Human Resources/Personnel - Talent Mgmt.
- Relocation/Mobility Services
- Finance/Accounting
- Shared Services/Procurement/Purchasing
- Other



# Corporate/Respondent Profile

## Q. 47 – Respondent's Position



# Corporate/Respondent Profile

## Q.47 – Respondent’s Position

By Company Size (Salaried Employees)

Respondent’s Position	Total	Less than 500	500-4999	5000+
President	5%	5%	6%	3%
Vice President	12%	12%	14%	12%
Director	25%	33%	26%	14%
Manager	33%	31%	28%	42%
Relocation Administrator	7%	3%	6%	14%
Supervisor	5%	5%	5%	3%
Coordinator	4%	4%	3%	4%
Recruiter	2%	1%	5%	1%
HR Assistant	2%	2%	3%	2%
Other	4%	4%	5%	4%

# Corporate/Respondent Profile

## Q.48 – Trade Publications Respondent’s Regularly Read



# Corporate/Respondent Profile

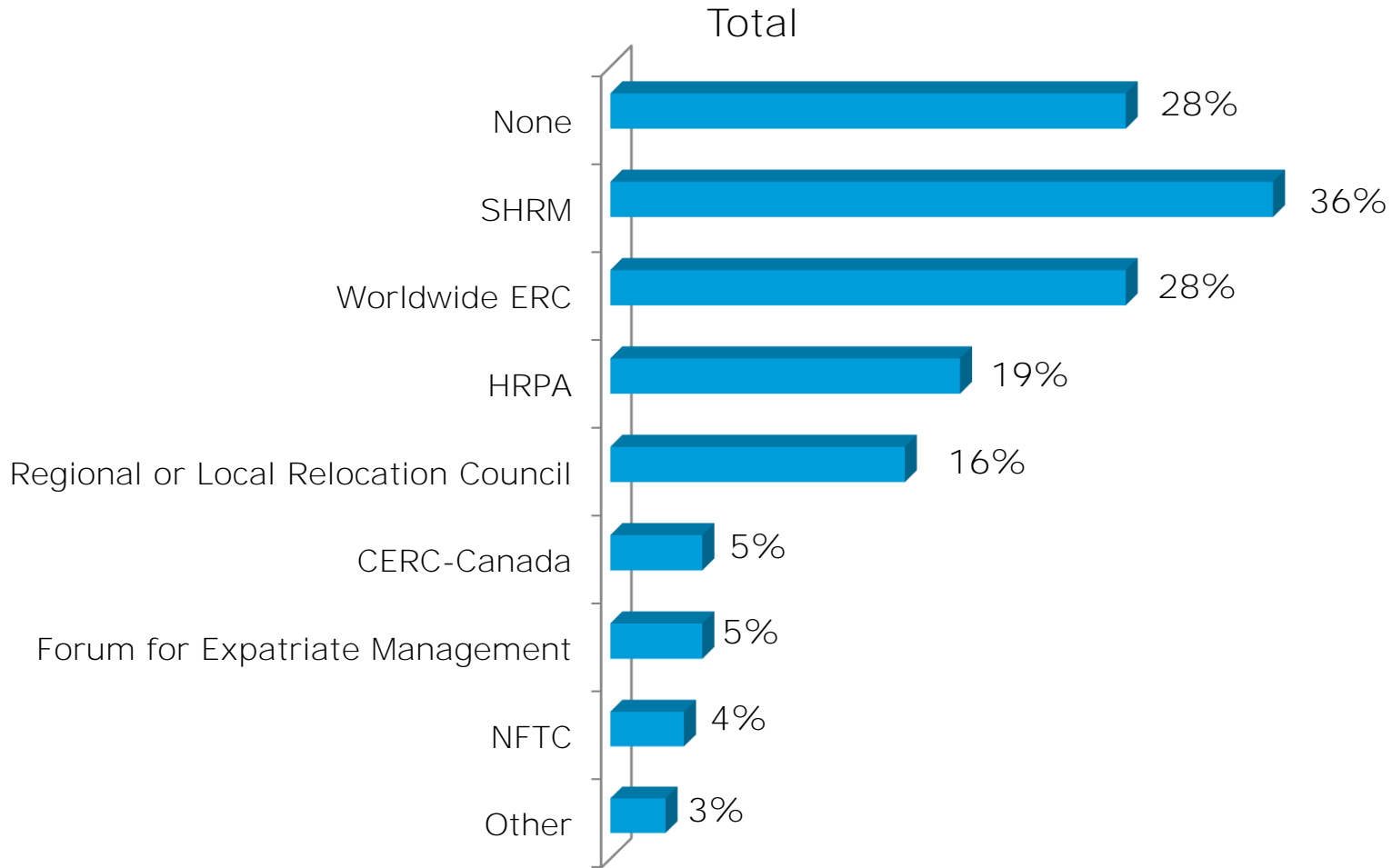
## Q. 48 – Trade Publications Respondent’s Regularly Read

By Company Size (Salaried Employees)

Trade Magazines Regularly Read	Total	Less than 500	500-4999	5000+
None	16%	11%	18%	21%
HR Magazine	46%	58%	45%	34%
Human Resource Executive	31%	34%	34%	26%
HR News	30%	34%	32%	23%
Employee Benefits News	25%	33%	25%	16%
Workforce	24%	26%	29%	18%
Mobility	22%	8%	15%	44%
Human Resources Outsourcing (HRO) Today	18%	19%	14%	21%
Runzheimer Reports on Relocation	10%	10%	9%	12%
The Relocation Report	9%	8%	10%	10%
National Relocation & Real Estate	9%	10%	8%	8%
Other	3%	3%	4%	2%

# Corporate/Respondent Profile

Q. 49 – Respondent Membership in Relocation-Related Associations



# Corporate/Respondent Profile

## Q. 49 – Respondent Membership in Relocation-Related Associations

By Company Size (Salaried Employees)

Relocation-Related Association Membership	Total	Less than 500	500-4999	5000+
None	28%	30%	31%	23%
Society of Human Resource Management (SHRM)	36%	43%	35%	30%
Worldwide ERC (formerly Employee Relocation Council – ERC)	28%	10%	21%	56%
Human Resources Professionals Association (HRPA)	19%	20%	21%	15%
Regional or Local Relocation Council	16%	10%	14%	27%
Canadian Employee Relocation Council (CERC – Canada)	5%	3%	6%	7%
Forum for Expatriate Management (FEM)	5%	0%	5%	13%
National Foreign Trade Council (NFTC)	4%	1%	6%	6%
Other	3%	3%	1%	5%

# Contact Information



**For further details and survey results from prior years...**

Please visit our web site:

[www.atlasvanlines.com/survey](http://www.atlasvanlines.com/survey)

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