

SURVEY Highlights

Atlas® is pleased to bring you this special 50th edition of our annual survey, the industry's first and longest-running investigation into corporate relocation policies and practices.

ATLAS IS IN IT FOR THE LONG HAUL

As we have done every year since 1968, we consider the demographic, geopolitical, and economic shifts affecting our industry. We analyze the findings and uncover the trends to more clearly understand the evolving challenges—and learn how we as relocation professionals can answer them.





RESPONDENT PROFILE

Invited via email, 471 decision-makers completed our online questionnaire between January 13 and February 23. Each respondent has responsibility for relocation and is employed by a company that has either relocated employees during the past two years or plans to relocate employees this year.

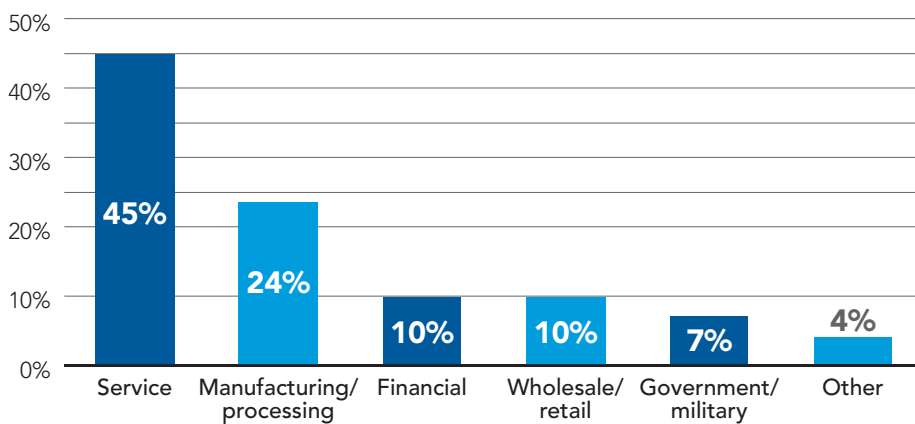
▪ Nearly all (88%) work in human resources/personnel or relocation/mobility services departments for firms in:

- Service (45%)
- Manufacturing/processing (24%)
- Financial (10%)
- Wholesale/retail (10%)
- Government/military (7%)
- Other (4%)

▪ For analysis, firms are categorized by size:

- Small: Fewer than 500 salaried employees (36%)
- Mid-size: 500-4,999 salaried employees (35%)
- Large: 5,000+ salaried employees (29%)

▪ 48% work in international firms.



LARGE
5,000+ salaried employees



MID-SIZE
500-4,999 salaried employees



SMALL
Fewer than 500 salaried employees



ECONOMIC ENGINE SHIFTS

Since 1977, the percentage of firms which are service based has essentially doubled (21.2% to 45% in 2017). This follows the trend of the overall U.S. economy shifting from a primarily manufacturing/processing driven engine to a more knowledge/service-based economy over the past 50 years. While manufacturing/processing firms still represent 24% of the companies participating in the survey, additional categories like financial, wholesale/retail, and government combined now comprise more than a fourth of represented sectors. The diversity of what drives the economic engine of the country also increases the unique factors that surround relocation needs of both companies and employees in the new millennium.

SUMMARY

Relocation Volumes & Budgets — Overall & International

More Relocations Last Year, More Expected in 2017, Budgets Continue Rebounding

In 2016, essentially half of companies across company size saw increases in volume, mid-size firms (51%) more so than others. Roughly half of firms relocating people internationally, regardless of size, saw volumes increase as well. Few firms saw volume decreases overall; however, 18% of large firms noted a decline. Mid-size and large firms were more likely than small firms (16% & 14% vs. 6%) to see a decline in international volume. Expectations for 2017 are positive: around half of firms expect volumes to increase overall and internationally, and roughly four out of ten expect stability compared to 2016. There is a continued elevation in small percentages of firms expecting decreases, but the values are well within historical, non-recessionary ranges and not unexpected after a few years of growth.

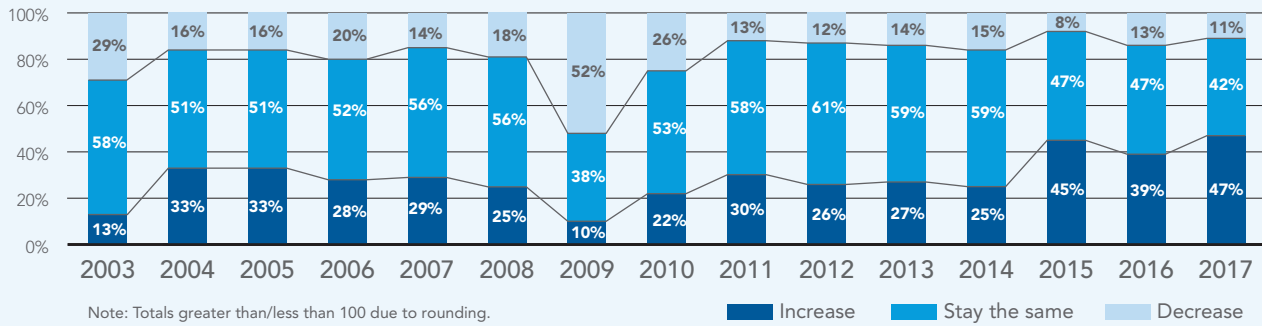
As volumes increased in the years after the Great Recession, budgets did not initially keep pace. However, for each of the past three years, nearly half of companies report their relocation budgets increased from the previous year, and 47% believe their budgets will again increase in 2017. Last year, while half or more of small and mid-size firms saw budget increases, slightly fewer (41%) large firms did. Projections for 2017 are essentially in line with last year's experiences across company size. In general, firms of all sizes expect growth or stability for budgets in 2017, and very few expect decreases.

- For the sixth straight year, the median numbers for relocations at large firms (200-399) remained at historical, non-recessionary norms after dipping lower in 2010 (100-199). The median remained at normative levels for small firms (1-9) for a second year after trending higher (10-19) in 2014. The median for mid-size firms returned to its normative, non-recessionary range (20-49) after being higher (50-99) the previous two years.
- While roughly half or more of firms across industries saw overall relocation volumes increase, the biggest increases occurred with government/military/public administration (56%) and for-profit service firms (50%). As well, 56% and 53% of these firms saw budgets increase. Generally, expectations across industries are similar for volumes and budgets.



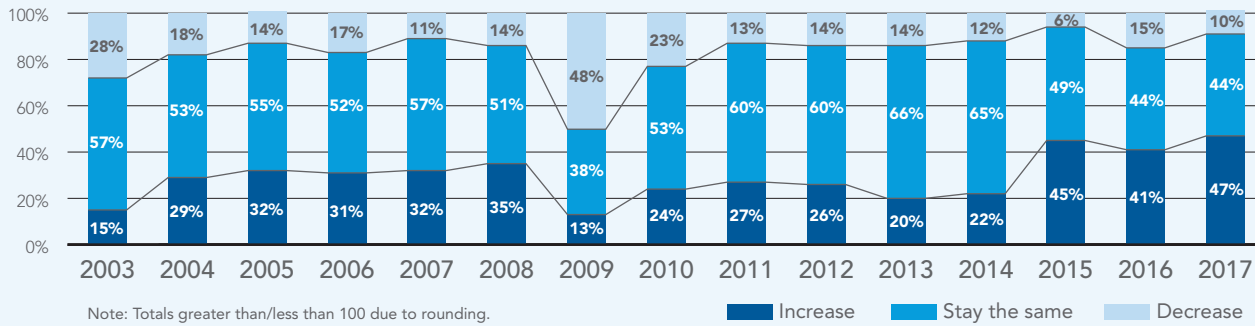
Q6: Overall Relocation Volume

Compared to [last year], do you anticipate that the number of employees your company will relocate during [this year] will...



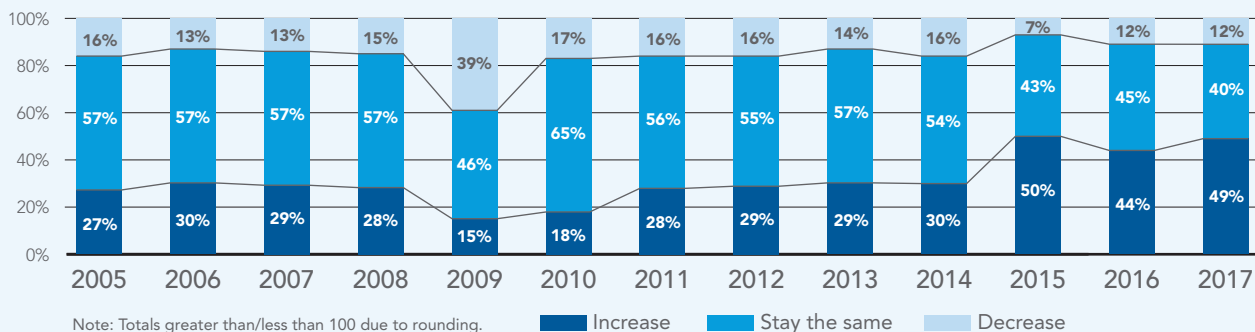
Q7: Relocation Budget Expectation

Compared to [last year], do you anticipate that your relocation budget for [this year] will...



Q44b: International Relocation Volume

Compared to [last year], do you anticipate that the number of employees your company will relocate internationally during [this year] will...



Factors Affecting Relocation – External & Internal

Relocation for Growth, Expansion, Talent Needs

The top three factors affecting relocation last year were: lack of local talent (44%); expansion efforts (43%); and company growth (41%). Company growth remains similar to previous recessionary levels, despite maintaining a substantial increase over 2009 (41% vs. 24%). Lack of local talent remains the top external factor. However, 43% of firms indicate an impact on relocation volumes when all types of expansion are considered (facility, new territories, or international), nearly equal to the impacts of talent needs and company growth. Thirty-four percent (34%) of firms reported economic conditions as a factor last year; this remains far lower than recessionary percentages, but higher than many non-recessionary years. Overall, the impact of the real estate market on volumes continues to be near historical lows (17%).

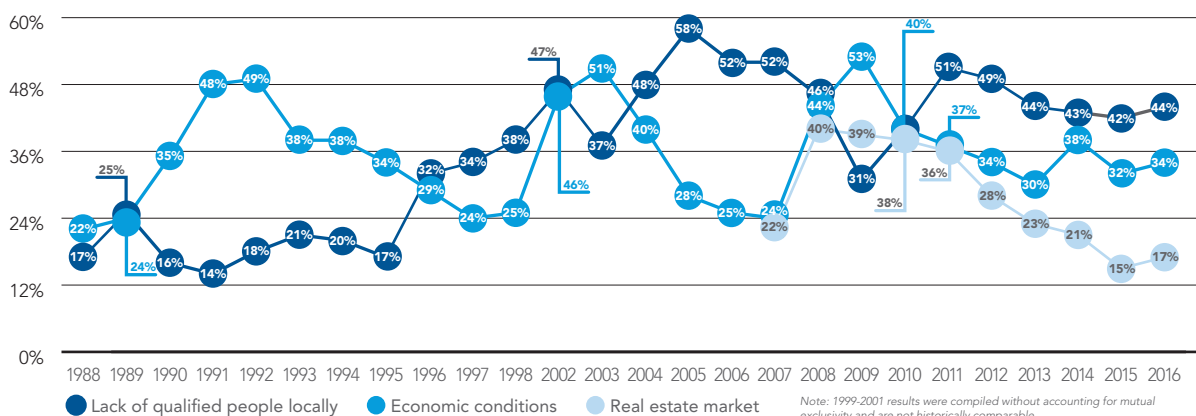
The industry appears to be in a state of good health. A majority of firms report improved financial performances over the past seven years. Real estate issues and budget constraints are at normative levels. Relocation volumes and budgets continue to rise. However, with the continued citing of economic conditions and the muted impact of company growth, companies may simply be keeping a sharper eye on margins. Years after the recovery began, creative solutions developed during the Great Recession have become permanent in mobility policy.

- The impact of factors continues to vary by company size. For large firms, the biggest impact resulted from corporate structure changes (53% – acquisitions/mergers or corporate reorganization/restructuring) followed by expansion efforts (44%), company growth (41%), and lack of local talent (40%). Mid-size firms were similarly affected by expansion efforts (43%), equal to their need for talent (43%), while company growth was a close third (37%). Small firms' biggest issue was talent (47%), with company growth (43%) and expansion efforts (41%) nearly tied for second.

- The impact of available talent remains markedly above the level recorded in 2009 (31%) and far above much lower levels seen before 1996. Regardless of company size, talent shortfalls remain a key driver of relocation volumes overall.
- Across company size, the impact of real estate remains at or near its lowest point since measurement began in 2007.
- Nearly half of for-profit service, manufacturing/processing, wholesale/retail, financial, and non-profit firms indicated talent needs as a main factor in their relocations last year. A third of these firms cited economic conditions as well. Roughly half of all firm types, except non-profits, saw expansion efforts as a key factor, with wholesale/retail firms citing the largest impact (58%). Roughly half of firms, except for manufacturing/processing and non-profits, cited company growth as well. A third or more of manufacturing/processing, for-profit service, and financial firms indicated changes in corporate structure affected volumes. Around a third of firms across type, with the exception of financial firms, cited growth in competition as a key issue as well.

Q13: Select External Factors: Impact on Relocation Volume 1988-2016

What external factors had the most significant impact on the number of your employee relocations in [last year]?





Employees Declining Relocation

Impact of Housing/Mortgage Concerns Continues To Fall, Spouse/Partner Employment Remains High

Housing/mortgage concerns as a reason for declining relocation has fallen the last four years. It is now within pre-recession levels for the second time since 2007—and for the first time across company size. In general, mid-size and large firms continue to be more affected than small firms (31% & 28% vs. 18%). For the fourth straight year, family issues/ties takes the top spot among firms of all sizes. Spouse/partner employment continues to hold second place for the fourth year in a row and remains near the highest levels recorded since the turn of the century. The Great Recession made it difficult for many families to maintain dual-income status; it appears employees remain mindful of the risk relocation can pose to their household's earnings. The impact of this factor had fallen to 39% in 2011, likely due to the difficulty of simply obtaining employment; it retains an eighteen percent gain over this low (57%).

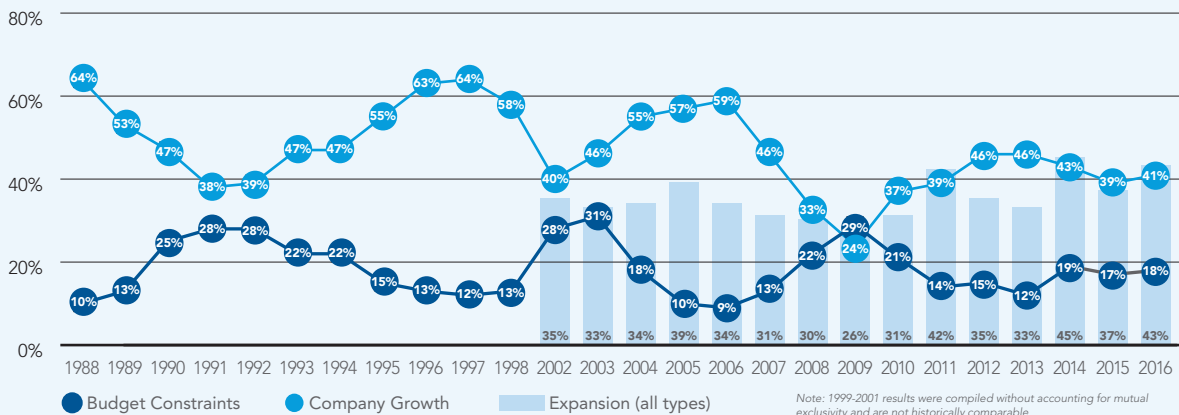
Nearly two-thirds of firms saw employees decline relocation last year, which is not unexpected, but at the high end historically. While increased employee reluctance (20%) remains slightly below the peaks of 2008 (28%), 2009 (29%), and 2014 (28%), it remains above typical post-recession levels (11%-18%) of recent years. This suggests firms trying to motivate employees to relocate are feeling continued pressure from such factors as family issues/ties and spousal/partner

employment. However, while increased reluctance remains at higher levels, a bit more firms also report decreases in employee reluctance over the past three years compared to many previous years, although at somewhat lower levels compared to the increases.

- Far more small firms (55% vs. a third on average, historically) saw employees decline relocation last year, similar to 2015 (48%) and increased reluctance actually rose above recessionary levels for small firms (25% vs. 15%-19%). Reluctance at mid-size firms fell compared to the previous two years (21% vs. 30%) but remains within recessionary ranges (20%-30%) over the past three years. However, reluctance among large firms falls again, far lower than recessionary levels (12% vs. 40%+) to well within post-recession recovery ranges (7%-21%).
- More than half of firms of all sizes cite spouse/partner employment as a reason employees declined relocation last year, near the highest levels seen since 2002.

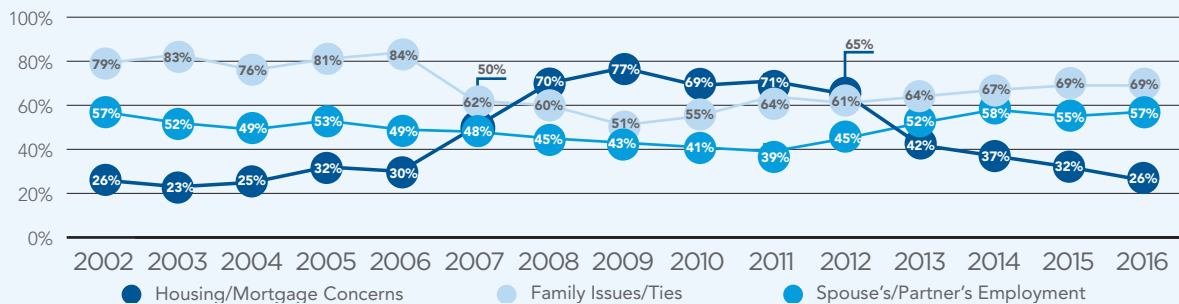
Q14: Select Internal Factors: Impact on Relocation Volume: 1988-2016

What internal company conditions had the most significant impact on the number of your employee relocations in [last year]?



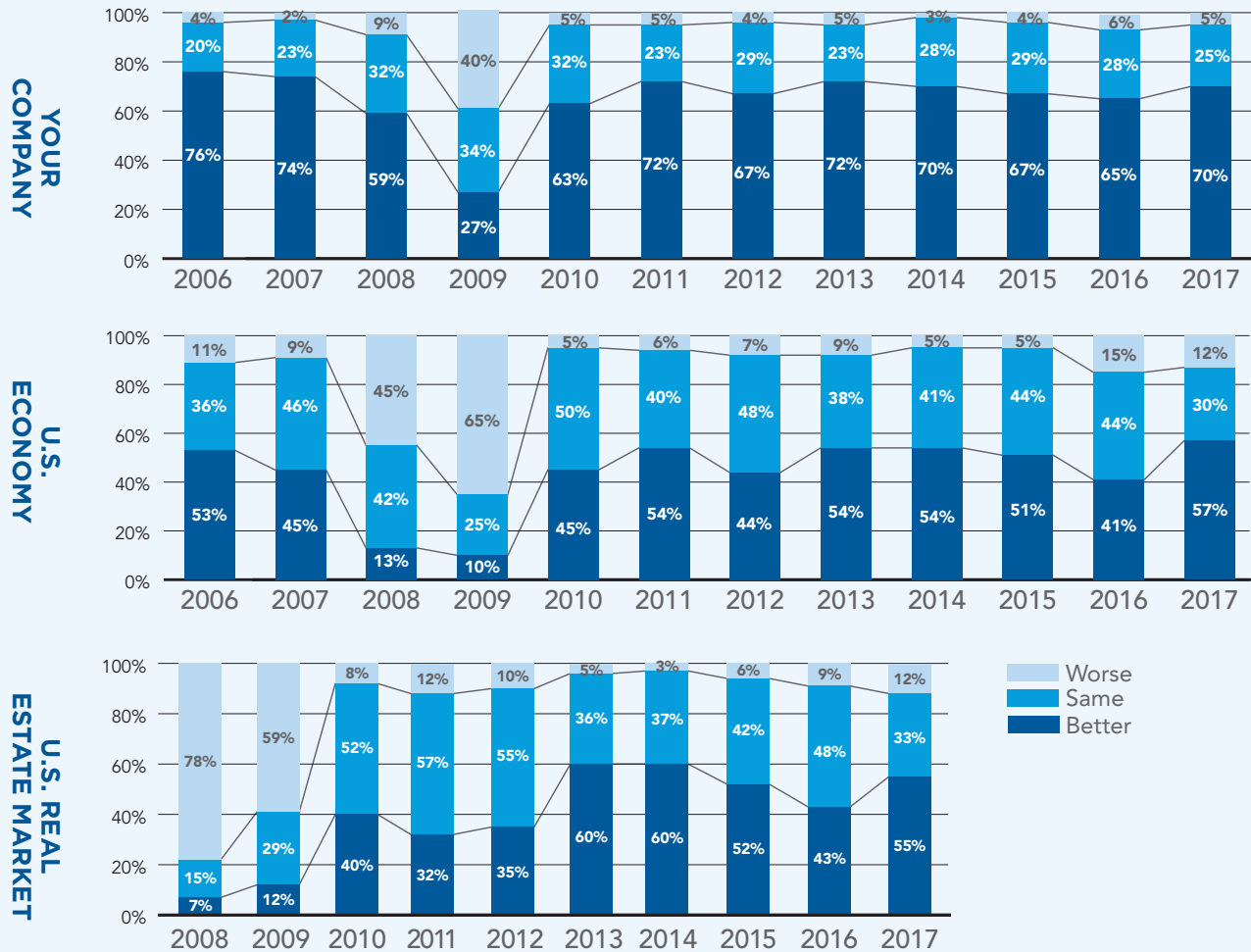
Q11a: Select Reasons Relocations Declined: 2002-2016

What reasons did employees give for declining relocation?



Q16: Anticipated Performance

Compared to [last year], please indicate what you anticipate for [next year]:



Note: Totals greater than/less than 100 due to rounding.

Economic Outlook

Outlook Tilts Improvement

While the vast majority of firms expect either stability or improvement in the U.S. economy in 2017, the percentage expecting further gains moves notably upward from last year's dip (57% vs. 41%) to the highest level of optimism since the recovery from the Great Recession began. A similar trend appears for the U.S. real estate market, with more expecting improvement than did last year (55% vs. 43%) and similar to expectations in 2013-2015 (52%-60%). Both fall in recovery/growth ranges, indicating an expansion/growth market for the coming year. The vast majority of firms expect improvement in their company's overall financial performance this year, similar to post-recession levels, with nearly all anticipating improvement or stability.

- Across company size, nearly two-thirds or more of firms anticipate better performances in 2017. Around half of mid-size and small firms expect improvements in emerging economies and in developed economies around

the world, while large firms are even more optimistic (66% & 60%). However, expectations for the U.S. economy trend a bit higher for mid-size and small firms compared to international projections and are similar for large firms, with roughly six out of ten across sizes expecting improvements domestically.

- Overall, 2016 was a positive year. Experiences line up with projections for 2017 across firms of all sizes in regards to company performance, the U.S. economy, U.S. real estate, and emerging and developed markets. Generally, greater percentages of large firms reported improvements across domestic and global economic zones and in the U.S. real estate market last year. Large firms also appear to be carrying the highest levels of optimism about emerging and developed global markets, but expectations for 2017 are similarly positive across firms of all sizes regarding their company's performance, the U.S. economy, and real estate.



Spousal Assistance

For the third straight year, the seismic shift in spouse/partner employment is affecting employee relocations “almost always” or “frequently.” Nearly two-thirds of firms continue to report this issue, far more than at any time over the previous 12 years (62% & 63% vs. roughly half or less). While small firms have seen this historically around half the time, it has jumped to 64%, markedly higher than historical averages and above the past two years’ elevated percentages (60% & 58%). An increase of more than 20 percentage points since 2013 remains in effect for mid-size firms (65% vs. 43%) after hitting 54% in 2014, 65% in 2015, and 68% in 2016. However, large firms, while still heavily affected, are less so compared to smaller firms (54% vs. 64%+); its impact remains far higher than 2014 (32%), although it rose a bit more in 2015-2016 (61%+).

With the importance of spouse/partner employment eclipsing historical averages over the past three years, we see a rise in spouse/partner employment assistance. Firms of all sizes have offered such assistance far more often over the past three years compared to previous levels. For the second year in a row it is being offered at similar levels across company size, not as something more often seen at mid-size and large firms.

- The most popular form of employment assistance at small and mid-size firms is networking assistance; for large firms it is outplacement/career services from an outside firm. Compared to last year, there is a marked upswing among companies of all sizes in paying for services from an outside firm (27% vs. 16% small, 37% vs. 27% mid-size, and 45% vs. 32% large). Around a third of firms across size offer assistance with resume preparation and around a fourth reimburse for expenses related to career transition.
- Large firms indicate that 26% of employees relocating with a spouse/partner used this type of assistance, while usage rates trend around a third for small and mid-size firms.

International

Nearly three-fourths of companies offer to help find jobs for spouses or partners relocating internationally, the second-highest level historically. For the third straight year, such assistance is more often available with international than with domestic relocations (72% vs.

62%); from 2008-2014, these levels were nearly identical. Also, for the third year in a row, the popularity of this assistance is similar across company size; historically, it has been offered at mid-size and large firms more frequently than at small firms.

- Similar to the domestic trend, more firms are offering to pay for outplacement/career services from an outside firm (29% vs. 17% last year), with increases across company size. Also worth noting: an overall uptick in firms offering to pay for work visas (26% vs. 21% in 2016) — driven largely by small firms (33% vs. 15% last year).
- For-profit service firms are far more likely than manufacturing/processing or wholesale/retail firms to pay for spouse/partner work visas (34% vs. 22% & 14%).

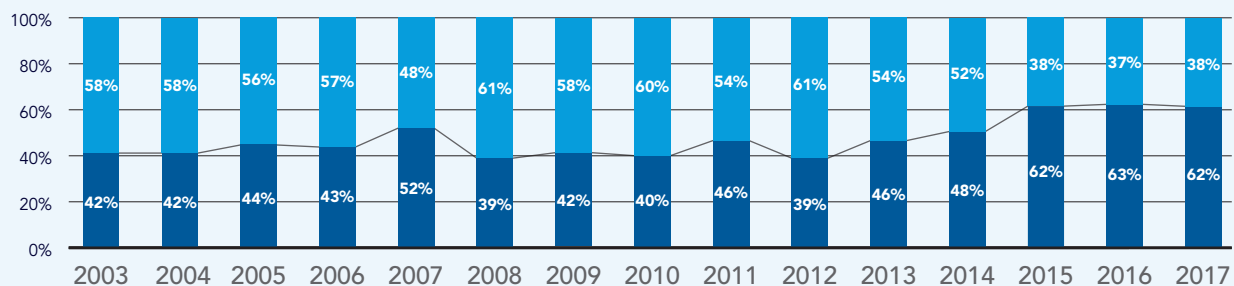
Family Assistance

For the third year in a row, firms are making far greater accommodations overall for childcare (65% vs. 31%-43% historically) and for elder care (51% vs. 16%-26% historically), even if merely providing lists of resources for support. However, since this shift occurred in 2015 and has remained stable overall, some trends by company size emerge. The percentages of small firms offering these types of support have increased in each of the last three years to historical highs. For mid-size firms, the levels jumped in 2015 and then stabilized at roughly those highs over the past two years. Among large firms, the offerings jumped to historical highs in 2015 and have trended downward since but remain similar to 2015 levels comparatively. In general, regardless of size, around two-thirds of firms offer accommodations for childcare. However, while more than half of small and mid-size firms offer elder care, just 43% of large firms do. The impact of family issues/ties remains a main factor in declined relocations and many employees are finding themselves caring for both older family members and children at the same time. Having children is often delayed in more affluent, high-earning households, typically part of the highly educated pool employers tap for relocation. However, large firms reported increased reluctance levels last year at nearly half that of mid-size and small firms (12% vs. 21% and 25%). While the need to accommodate childcare likely remains pressing, these firms may be experiencing less pressure to offer elder-care assistance.

- Seldom/Never
- Almost Always/Frequently

Q38: Spouse/Partner Employment Impact

How frequently is an employee's relocation affected by the employment status of that employee's spouse/partner?



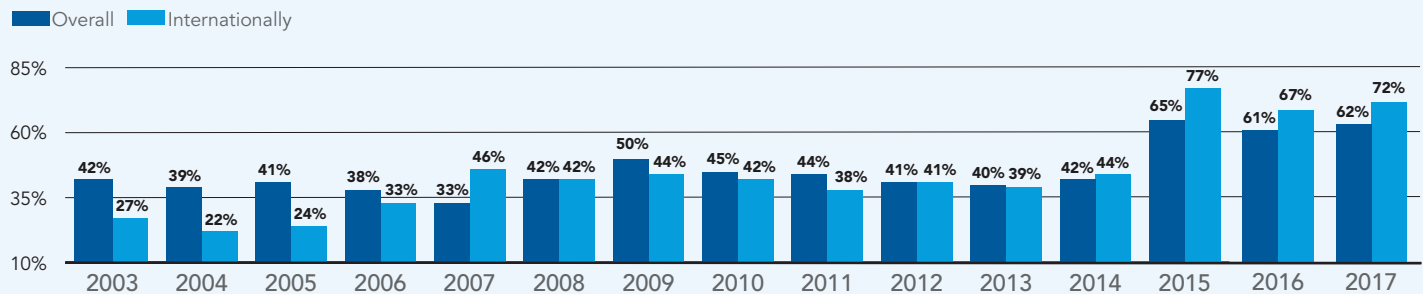


FAMILY COMPOSITION WEIGHS HEAVILY ON RELOCATION

Families that came through the Great Recession may be reluctant to gamble financial security on single salaries, placing a higher priority on keeping a dual-income household. With the importance of spouse/partner employment at far higher levels, far more firms have responded with offers of spouse/partner employment assistance. Only around 1 out of 10 firms offered this in 1977 - this has now exploded to nearly two-thirds of firms offering this type of assistance in 2017

Questions 39a & 44k: Spouse/Partner Employment Assistance

Percentages of firms offering this assistance:



Relocation Policy & Practice

The Great Recession played a massive role in redefining relocation assignments and reimbursement methods. Industry professionals brought great creativity to balance crushing economic blows with their talent needs, and an industry transformation occurred. Types of assignments expanded, new policies were formalized, and greater flexibility became built-in. Cost-containment efforts, incentives, and reimbursement methods all diversified to answer a new reality.

Multiple Policy Types & Practices Leveraged, Traditional Assignments Remain Majority

Corporate professionals continue to find themselves bearing responsibility for more diverse relocation programs. Similar to the previous few years, the vast majority manage formal policies for domestic (82%) and international relocations (86%), along with policies for permanent international transfers (71%), short-term/temporary assignments (67%), and international localization (63%). More than half maintain international intra-regional (56%) and extended business travel policies (54%) as well, and 43% have a policy for long-distance commuter arrangements.

- Mid-size and large firms continue to be more likely to maintain formal domestic and international policies overall. In the recent past, they have also been more likely to have policies for specialized arrangements outside general domestic and international policies. However, this year differences emerge. Firms across size that relocate internationally are similarly likely to have policies for permanent transfers, localization, and intra-regional assignments. Domestically, large firms are far more likely than small or mid-size firms to use a policy for short-term/temporary assignments (79% vs. 60% & 64%). Mid-size firms are most likely to have policies for extended business travel (61% vs. 52% of small firms and 48% of large firms). Small and mid-size firms are more likely than large firms to have long-distance commuter policies (45% and 48% vs. 35%).

- Besides an increasing variety of policies, most firms continue to define levels, or tiers, within policies. The larger the firm, the more likely its overall domestic relocation policy includes multiple levels. Firms using tiers manage two or more such policies on average across company size. These are based on a variety of factors; however, the top two, domestically, are job/grade level and position/job title. Internationally, assignment length is nearly equal in consideration to these two factors. Job/grade level, position/job title, and assignment length carry more weight in determining policy tiers at small and mid-size firms. However, job/grade level trumps all other factors at large firms by a big margin.

Candidate Assessments

Candidate assessments have come into widespread use over the last few years to support successful relocations. For the last three years, roughly three-fourths of firms assessed candidates prior to relocation, a vast increase over the roughly half of firms that performed some level of vetting from 2012 to 2014. Overall, the most popular method continues to be assessments for all relocations (40%), down slightly but similar to 2015-2016 (46%+) and remaining roughly double the 21% levels from 2012 to 2014. However, there is a marked decrease among large firms performing assessments universally compared to the previous two years (29% vs. 42% & 44%), with far more large firms performing them "as needed/requested" this year compared to small or mid-size firms (22% vs. 12% and 9%). The number of large firms performing assessments overall is also down slightly (68% vs. 73%+) compared to the past two years, while the percentages of small and mid-size firms remain fairly similar to the past two years.



Fixed Benefits/Flex Benefits Menu-Driven Policy

Over the last three years, relocation volumes increased despite unique pressures from many sources. The incorporation of fixed/flex elements into policy is now nearly universal. From 2015 to 2017, nearly 9 out of 10 firms used aspects of fixed/flex policy, a marked increase from around two-thirds of firms doing so in 2013 and 2014. Additionally, over the last three years, the use of fixed/flex policy has become established at similar levels across company size; previously, such tailoring of benefits was much more likely at mid-size and large firms than at small ones. Coverage for core components remains the most popular aspect across firms of all sizes (either across all employee levels/categories or depending on employee level/category). One shift this year from the previous two: fewer mid-size and large firms offer flexible use of the full relocation benefit or a portion of it (either to all employee levels/categories or dependent on these factors). This is a return to near 2013 and 2014 levels, while the percentage of small firms offering the flexible use of full benefit amounts remains essentially double compared to that reported in 2013 and 2014.

Since the coverage of core components is the most popular aspect of fixed/flex policy, for the second year we dug deeper into which costs fell into this category. Overall, the top expense types are travel expenses-final move (58%), household goods shipping (55%), and temporary housing (53%). Across cost types, large firms are far more likely than mid-size or small firms to consider a cost as a core benefit, with roughly half or more doing so across components. Travel expenses for the final move is the only element considered a core benefit by more than half of small and mid-size firms. Additionally, far more mid-size than small firms consider some form of real estate assistance a core benefit (origin: 40% vs. 28%; destination: 36% vs. 18%), compared to 51% of large firms.

Incentives

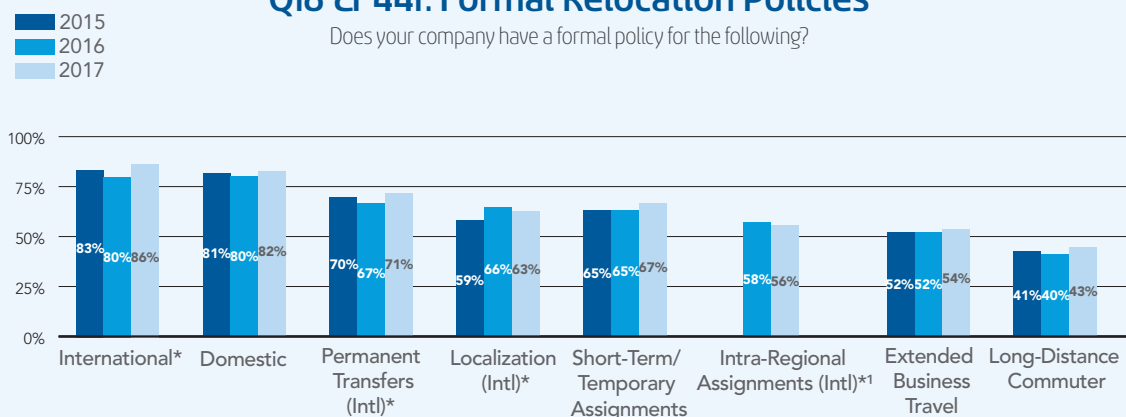
To encourage relocations, the vast majority of firms across company size continue to offer additional, non-standard incentives or policy exceptions at or near historical highs, similar to 2014 to 2015. With increased employee reluctance rising to recessionary levels in 2014 and staying elevated over the last two years, policy tools to support greater acceptance remain key. The waning impact of housing/mortgage pressures is evident in that far fewer firms offered extended temporary housing benefits in 2014-2016 than did in 2013 (57%-61% vs. 72%). However, it remains one of the top three incentives over the last three years. Relocation bonuses and cost-of-living adjustments (COLAs) continue to round out the top three offerings across company size.

- While around half of firms across size offered COLAs and nearly two-thirds offered extended temporary housing benefits, relocation bonuses were more often used by small (56%) and mid-size (60%) firms than by large (42%) firms as incentives for relocation. Large firms were more likely than small or mid-size firms to offer loss-on-sale protection (34% vs. 10% and 12%), guaranteed buyout options (32% vs. 14% and 20%), or buyer value options for origin homes (30% vs. 13% and 20%), similar to 2014 and 2015.
- Mid-size and small firms flexed other creative options to a greater degree than large firms last year – both were far more likely to offer a guarantee of employment contract (31% and 29% vs. 19%) if a relocation was accepted. 25% of mid-size firms offered mortgage payoffs/loans (compared to just 8% of small and 12% of large firms) if the property sale wouldn't cover the employee's mortgage debt.

Incentives continue to be highly successful: nine out of ten firms say incentives worked almost always or frequently, similar to historical levels.

Q18 & 44f: Formal Relocation Policies

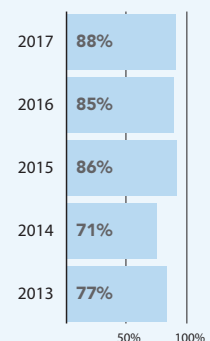
Does your company have a formal policy for the following?



* Percentage of those who indicated they relocate employees internationally (Q2)
 1 Not included in 2015 survey

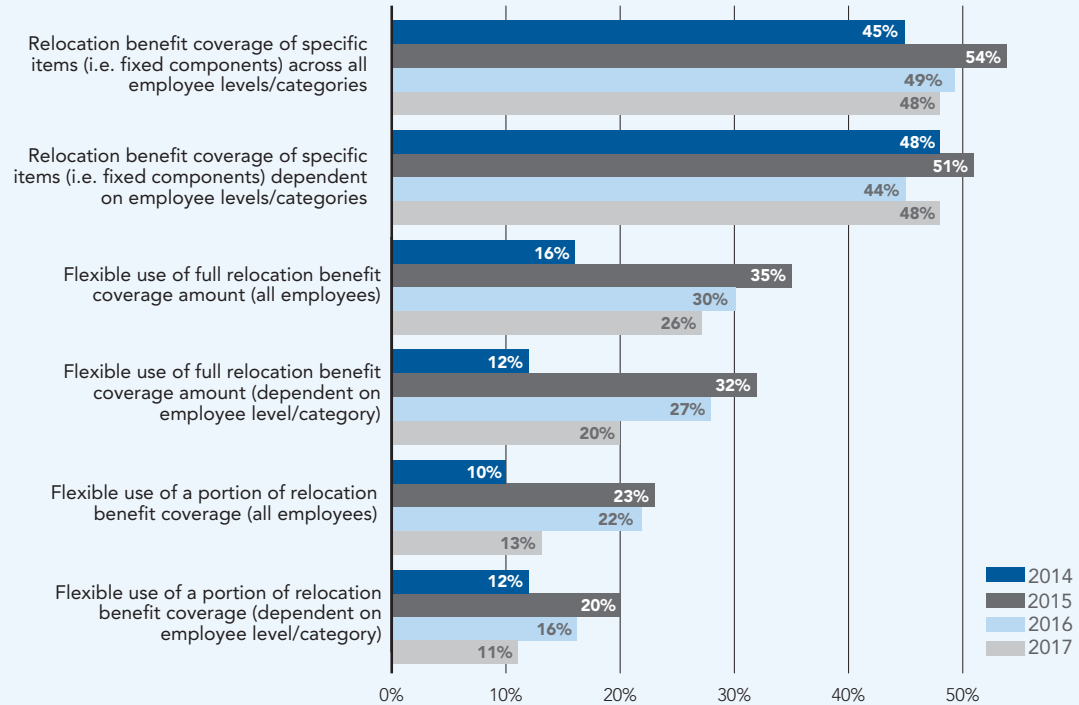
Q19a: Core/Flex Policy

Does your relocation policy utilize aspects of core coverage/flex menu-driven policy?



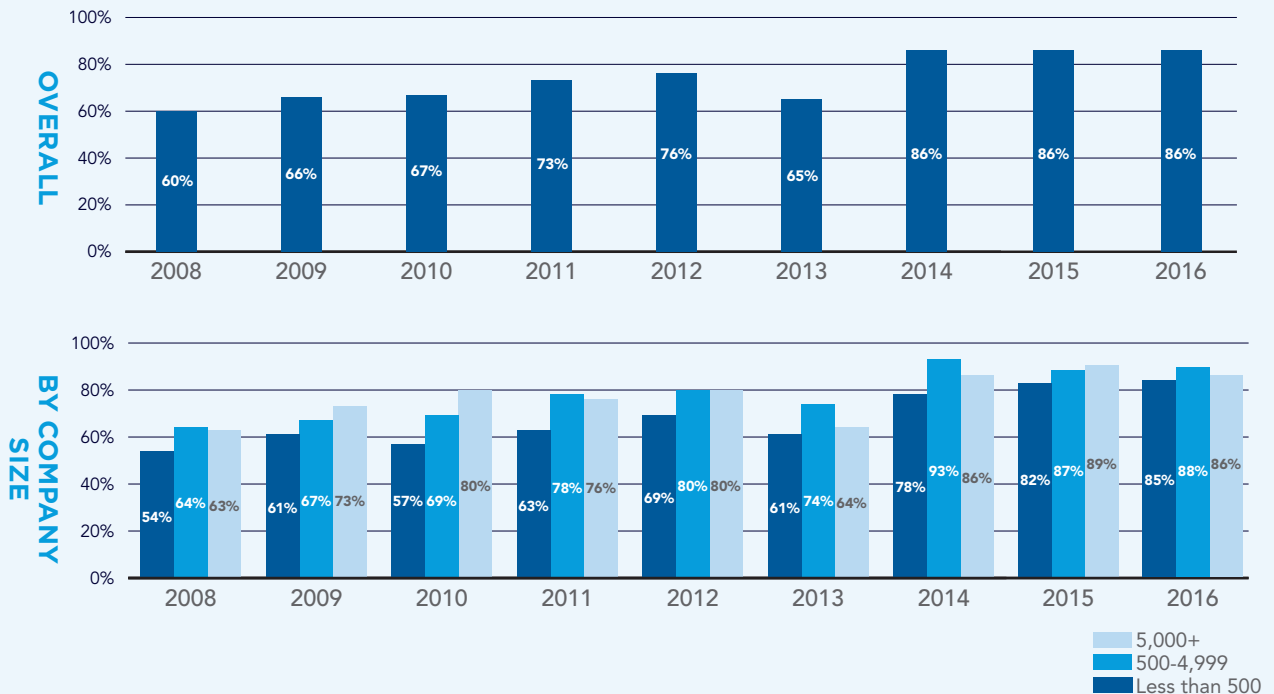
Q19b: Use of Core/Flex Policy in Relocation

Which of the following aspects of core coverage/flex menu-driven policy does your relocation policy incorporate?



Q10a: Additional Incentives Offered: 2008-2016

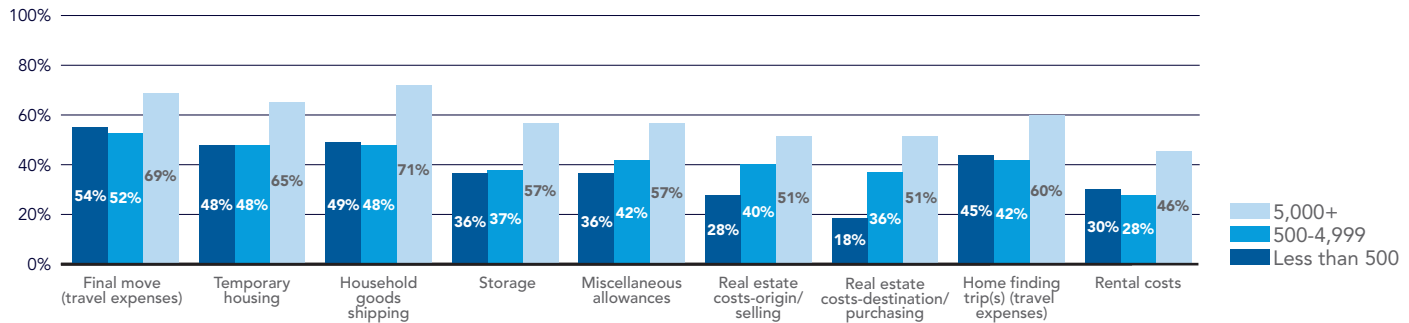
Did your company offer additional non-standard incentives or exceptions to encourage employee relocations over the past year?





Q19c: Relocation Costs Considered Core Coverage/Fixed Benefits

What type(s) of relocation costs are considered fixed benefits within your relocation policy?



Cost Containment

Even though most firms report continued optimism and improved financial performance over the last few years, cost containment is at historical highs across firms of all sizes. Economic conditions remain a significant factor on relocation volumes, causing keen sensitivity to the bottom line. So, it is not surprising that cost containment runs high for a third straight year after declining in 2012 and 2013. Creative solutions adopted during the Great Recession for controlling costs now seem to be mainstream across company size to optimize financial resources for relocation.

The use of cost-containment methods at large firms is similar to levels recorded during the recession and the first three years of recovery (87% vs. 78%-84%). Markedly more small firms used such methods last year (80%) in comparison to 2014-2015 (70%-71%), which represented a large jump from previous usage levels. Implementation by mid-size firms rebounded significantly (86% vs.

74% in 2015), similar to 2014 (84%) and well above historical levels. Generally, use of lump sum payments and capping relocation benefit amounts were the most popular methods across company size.

However, large firms were also just as likely to review/renege supplier contracts. Most other methods remained more popular than they were in 2013, even if dipping below 2014 levels. The survey's modification to include lump-sum payments as a means for cost-containment revealed the biggest change: roughly a third of firms reported they use lump sums for this reason.

- Similar to previous years, large firms rely on cost-containment overall far more than smaller firms. Large firms remain far more likely than mid-size or small firms to use reviewing/renegeing supplier contracts (37% vs. 24% and 20%) and pre-decision counseling (28% vs. 15% and 9%). Additionally, large firms remain much more likely than small firms to modify COLA-offering policy (19% vs. 9%) similar to 2015 (24% vs. 7%).

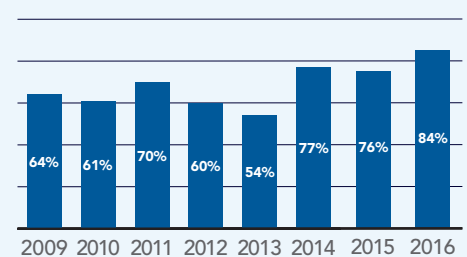
Q21: Cost Containment Methods Used 2009-2016

Respondents were given a list of possible cost containment measures; the answers received indicate that...

BY COMPANY SIZE



OVERALL



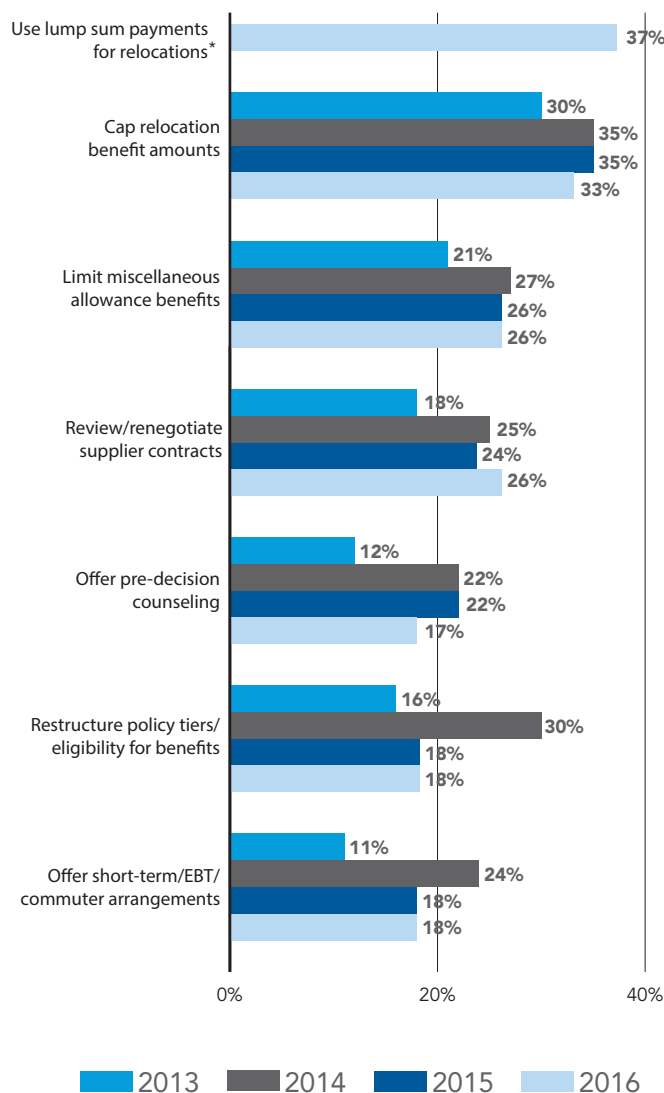


ALTERNATIVE ASSIGNMENTS

Since 2015, roughly two-thirds of firms indicate they are using alternative assignments of some type. Additionally, 67% of firms continue to indicate they have a formal short-term/temporary assignment policy, 54% have an extended business travel policy, and 43% have a policy for long-distance commuters.

Q2: Cost Containment Measures (Top 7) 2013-2016

Did your company use any of the following cost containment measures in relocation policy/practice over the past year?



Alternative Assignments

Over the last three years, the majority of firms have come to rely on arrangements other than traditional relocations. Roughly two-thirds of firms indicate they use alternative assignments (67%) similar to the past two years (64%-65%) and far more often than the previous three years. The percentage of large firms using such arrangements is at the highest level measured (74%) on par with 2015-2016 (72%-73%) after progressively increasing from 2012 through 2014 (60%, 62%, and 66%). Usage among mid-size firms remains nearly twice that of 2014 (70% vs. 37%) and similar to 2015 (75%) and 2016 (68%). Usage among small firms also reaches a historical high (59%), continuing to grow after progressively increasing from 2015 to 2016 (48% to 54%), and is now nearly three times that reported in 2014 (19%).

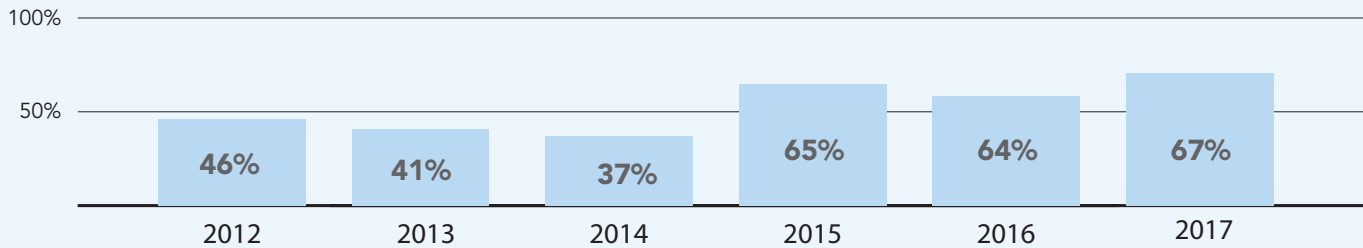
The mobility policy methods for alternative assignments vary widely. In the past, the overwhelming policy driver was accomplishing strategic business goals. Now, most methods show similar usage levels overall. However, while nearly every potential policy method is used by roughly a third or more of firms across company size, there are a few differences. Far more small and mid-size firms use alternative assignments in place of long-term assignments compared to large firms (47% vs. 30%), while large firms are more likely to use these assignments to meet strategic business goals (50% vs. 31% and 28%). These unique arrangements were birthed as a solution to meet the strategic business needs for staff to move geographically while not bearing the full costs of traditional relocations. They appear to continue to be used to meet company needs and objectives depending on the needs presented.

Overall, the top four factors used to determine whether alternative assignment options are brought into play are: business need (61%), cost (52%), assignment purposes (51%), and job function (46%). However, the weight of these factors varies widely by company size this year, while remaining fairly normalized overall compared to the past few years. Among large firms, business need (75%) far outstrips other factors, although cost (51%) and assignment purpose (49%) are second-place considerations. The top four factors are far more equal in consideration at small and mid-size firms; job function carries far more weight at these firms than at large firms (57% and 46% vs. 34%).



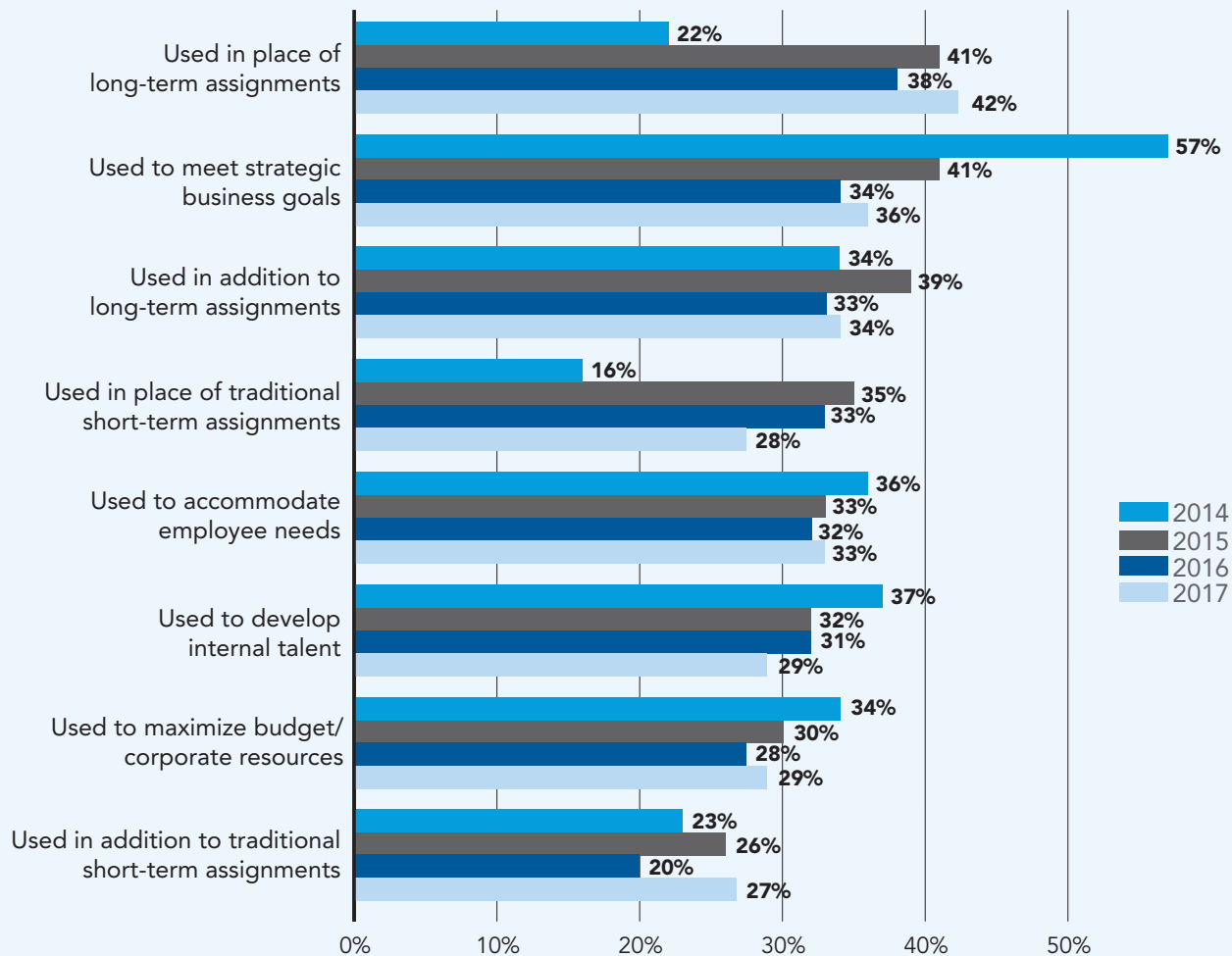
Q27: Alternative Assignments Used: 2012-2017

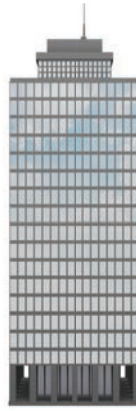
Is your company utilizing "alternative assignments" (i.e. extended business travel, cross-border commuting, rotational, localization, permanent international transfers, etc.)?



Q27a: Alternative Assignment Use In Employee Mobility Policy

How are these "alternative assignment" arrangements incorporated into your organization's overall employee mobility strategy?



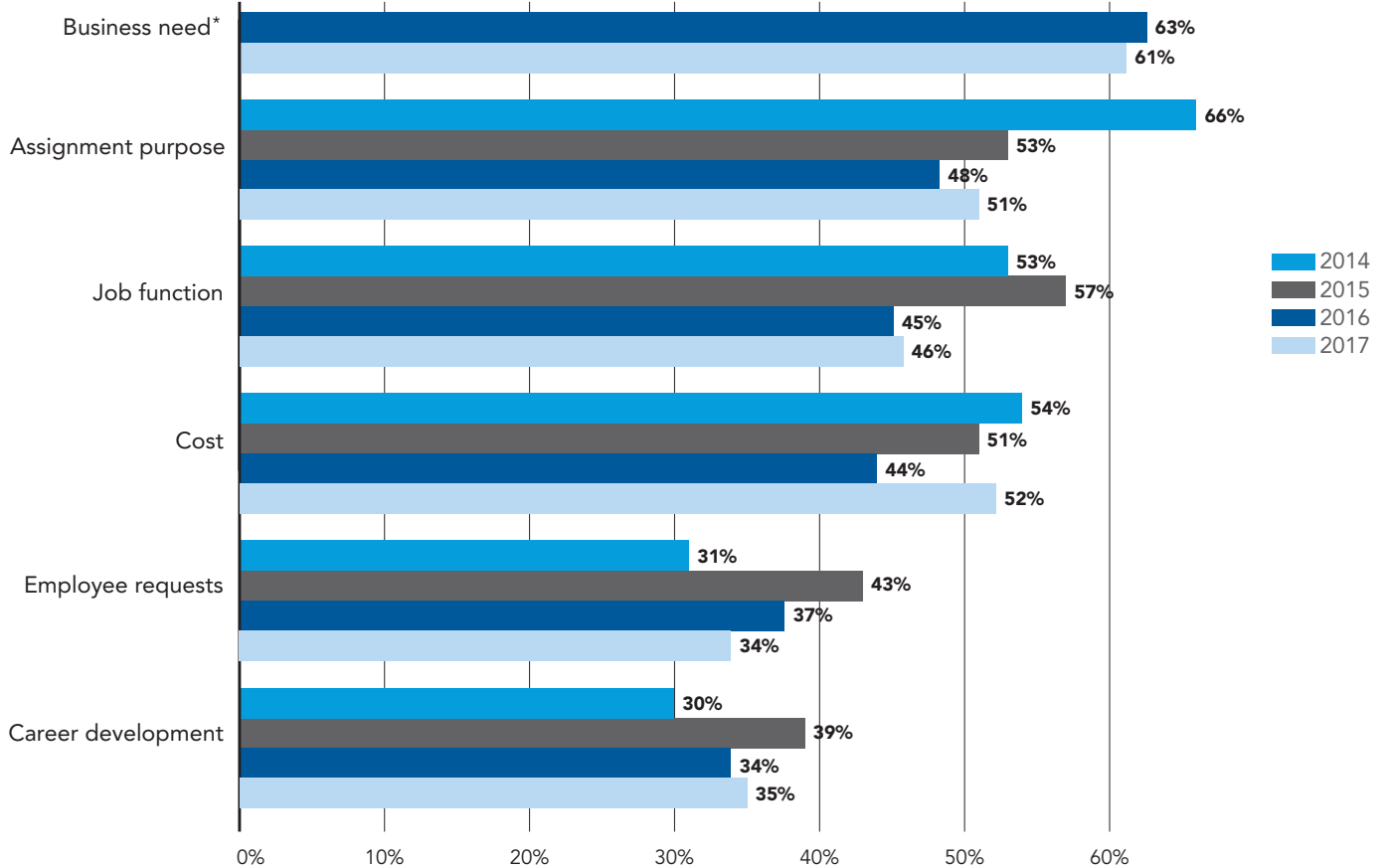


**IMMENSE DIVERSIFICATION
OF ASSIGNMENTS, POLICIES &
REIMBURSEMENT METHOD SHIFTS**

Prior to the new millennium, full reimbursement was by far the most frequently utilized method of cost coverage for relocations for both transferees and new hires. However, in recent years, companies estimate that roughly half of their relocations were either only partially reimbursed by the company or were lump sum payment only. While full reimbursement is still the most popular reimbursement method for transferees (65%), lump sums are also used very frequently (55%) as well as partial reimbursement (48%), with reimbursement type often dependent upon current employee level. New hires have seen the greatest permanent shift away from full reimbursement in recent years. For the third straight year, full reimbursement of expenses for new hires (42%) is out of favor in comparison to lump sum payments (53%) and partial reimbursement (48%) and remains near the lowest levels historically measured.

Q27b: Alternative Assignment Use Determining Factors

What are the key factors that determine if an "alternative assignment" method will be used?



* Not included in 2014 and 2015 survey



Relocation Reimbursement/Payment

Multiple Methods Still Favored, More Transferee & New Hire Differentiation

The continued use of multiple reimbursement methods shows how companies tailor assistance to answer the needs of employees and businesses. For the third year, full reimbursement for new hires (42%) remains near the lowest level historically (36%-38%, 2015-2016), out of favor in comparison to lump-sum payments (53%). Full reimbursement for transferees rebounds (65% vs. 55% last year) and is now similar to highs of the past twelve years (63%-66%). A notable change is the reemergence of partial reimbursement for new hires or transferees among nearly half (48%) of firms. This number was closer to a third the previous five years, now returning to levels seen for new hires from 2009-2011 (46%-51%) and surpassing the 2011 peak for transferees (47%). Lump-sum usage for transferees also jumps (55% vs. 42% last year) to the highest level historically, even above the highs reported from 2011-2015 (47%-49%). It also moves upward for new hires (53% vs. 45% last year) falling in line with historical usage by about half of firms since 2008.

- For transferees, reimbursement methods this year are similar across company size; around two-thirds use full reimbursement, over half use lump sums, and roughly half use partial reimbursement. For new hires, however, differences emerge by company size. Large firms are more likely than small firms to offer full reimbursement (48% vs. 37%), while both small and large firms are more likely than mid-size firms to offer lump sums (56% and 60% vs. 43%). Use of partial reimbursement for new hires is similar at firms of all sizes, with around half offering it.
- The percentage of large firms using full reimbursement is near historical lows for both transferees and new hires. However, among small firms,

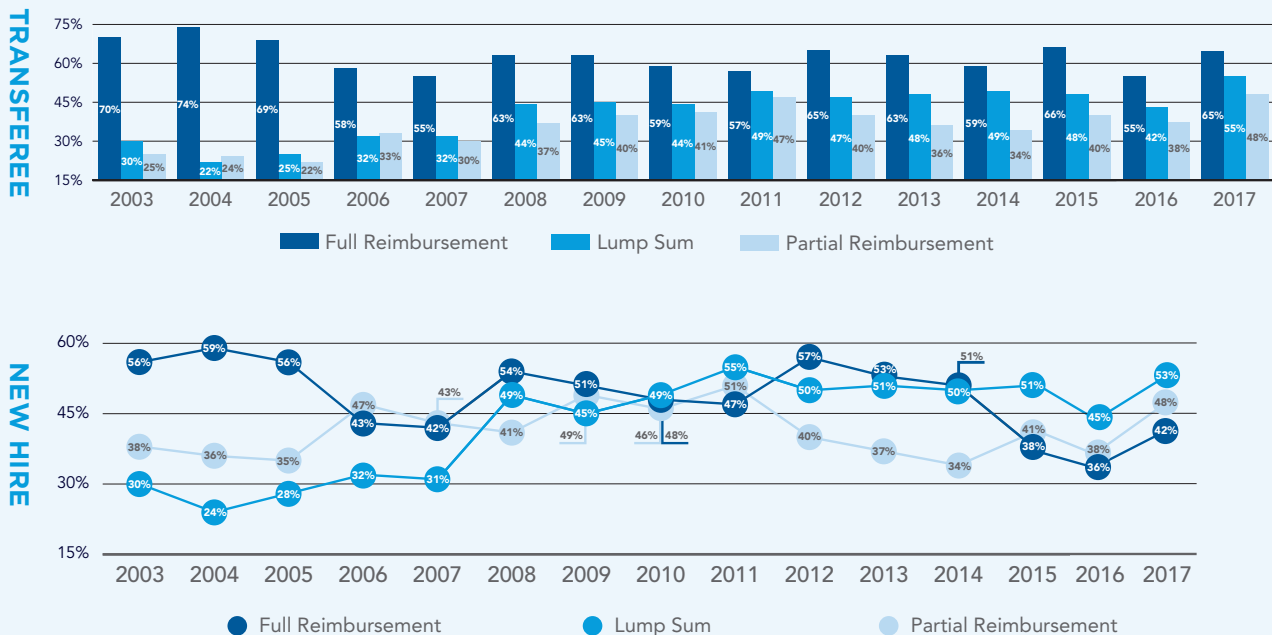
full reimbursement for transferees jumps to the highest level on record (65%), far more than last year (47%). Full reimbursement for new hires also increases (37% vs. 25%) but remains near the lower ranges historically. Mid-size firms also report an increase in full reimbursement (67% vs. 55% last year) returning to a historically normative range after last year's low, while it remains near historical lows for new hires.

- After dipping slightly last year, use of lump sums for transferees is now at the highest level historically, driven primarily by vast increases in use among large firms (61% vs. 45% last year) and small firms (54% vs. 38% last year). For mid-size firms, usage returns to historic norms of the past nine years (51%). A similar trend emerges in lump sum benefits for new hires: usage is at the highest levels historically for large (60%) and small (56%) firms, but it trends closer to the lower range of the past decade (43%) for mid-size firms.

Companies estimate that roughly half of their relocations were either partially reimbursed or paid by lump sum only. Before the turn of the century, full reimbursement was by far the method used most frequently to cover costs for both transferees and new hires. As in recent years, firms continue to differentiate for full reimbursement (65% for transferees vs. 42% for new hires). While use of lump sums and partial reimbursement remain similar for transferees and new hires, current employees appear to receive greater benefit in the area of full coverage. Last year, large firms estimated over half of relocations were fully reimbursed, while mid-size and small firms estimated only four out of ten were.

Q3: Transferee/New Hire Reimbursement 2003-2017

To what extent does your company reimburse: Transferees? New Hires?



Lump Sum

Continued Use as Supplemental and Full Program Options

Initially used sparingly, lump sums appear to have solidified over the past decade as a permanent piece of relocation policy and practice. Similar to the last few years, firms report around a fourth of relocations were lump sum payment only. However, lump sums are applied in myriad ways; some cover specific costs in a supplemental manner. Our survey continues to investigate which costs fall under lump-sum payments, and to whom and to what types of relocations they are applied. Some notable trends have emerged. Identical to last year, half of firms use lump sums to manage temporary housing costs (50%), up notably from previous years (38%-43%). For the third year in a row, nearly twice as many firms used lump sums to cover real estate assistance/transactions (28% vs. 11%+) or rental assistance/transactions (33% vs. 16%+) than did on average from 2011-2014. The percentage using lump sums to cover household goods shipping/storage increased progressively from 2011 (28%) to a historical high (44%) in 2016 and again this year. Roughly half of firms use lump sums for four out of the seven cost types listed, indicating diversity in how lump sums answer different situations in relocation management. While 41% of firms use them for the entire relocation cost, supplemental use occurs among these firms as well.

- Overall, small and mid-size firms are more likely than large firms to use lump sums for household goods/shipping costs (53% and 46% vs. 32%), while large firms are more likely to use lump sums for miscellaneous allowances compared to small or mid-size companies (71% vs 52% and 50%).
- In the past, far more differences existed among companies in how lump sums were applied; in recent years, the frequencies of use are mostly similar across company size.

Employee and Relocation Types Receiving Lump Sums

The vast majority of firms across company size indicate that lump sums are most often applied for domestic relocations (87%). Around a third of firms overall use them for short-term/temporary assignments or international long-term assignments; about one sixth use them for alternative assignments. Mid-size firms are slightly more likely than small or large firms to use lump sums for international long-term assignments (41% vs. 29% and 33%), but use across company size and assignment type is similar overall.

The use of lump sums across employee types continues to shift in response to the changing environment of relocation. When first measured in 2011, around half or more firms said most employee types, except for homeowners, commonly received lump-sum payments. Gaps widened in 2012. In 2013 and 2014, new hires were more likely to receive lump sums than transferees, and employee level was less a factor than new-hire status. However, the landscape began changing in 2015. Far more firms from 2015 to 2017 than in prior years now use lump sums for executives (54%-59% vs. 32%+), and far fewer firms use lump sums for new hires (43%-49% vs. 59%+). Despite these trends, underlying use by company size is shifting. For executives, it has jumped to the highest levels historically for small firms

(66%) and to near-historical highs for mid-size firms (59%), while dropping from last year's increase among large firms (44% vs. 63%). Usage for new hires remains lower among mid-size firms (39%), rebounds markedly for small firms (50% vs. 39% last year), and remains similar to last year's historical normative levels for large firms (60% vs. 56%). Use of lump sums for experienced professionals remains similar to historical norms (58%) overall. However, underlying shifts by company size emerge here, too, with more small firms than mid-size or large firms exercising lump sums for these employee types (65% vs. 54% and 53%). Overall, usage of lump sums for entry level employees, renters, and homeowners remains within historical norms over the last two years after dipping in 2015.

- Among large firms, roughly half or more use lump sums across employee levels and employee types; far fewer base lump-sum offerings on homeowner (36%) status.
- New hires are more likely to receive lump sums from large and small firms than from mid-size firms (60% and 50% vs. 39%).
- Small and mid-size firms are more likely than large firms to provide lump sums to executives (66% and 59% vs. 44%), while large firms are more likely than small or mid-size firms to offer these to entry-level employees (67% vs. 37% and 44%).
- Relocating homeowners or renters are the most likely to receive lump sums from large firms compared to small or mid-size firms (36% vs. 22% and 25%, 48% vs. 41% and 34%).

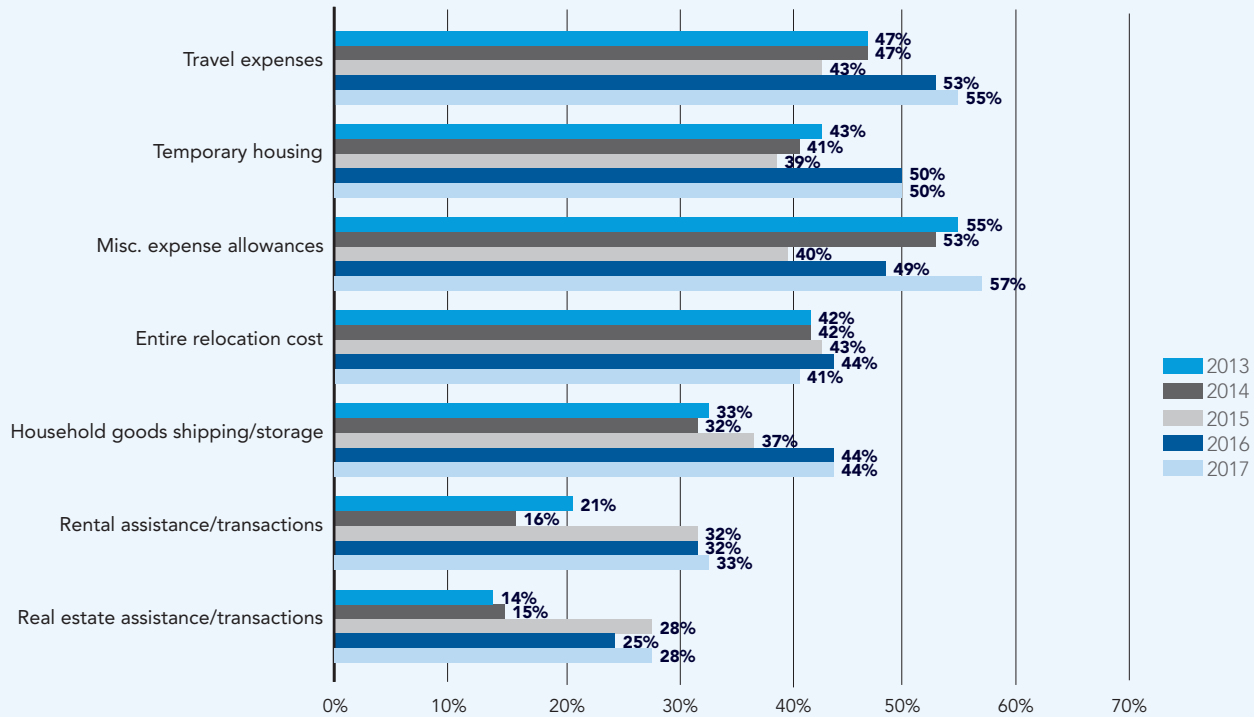
As lump-sum usage has grown, the survey has incorporated additional questions about monetary ranges for the categories of reimbursement. Compared to the past four years, most offerings are more frequent and generous than in 2013 and on par with 2014, despite some dips below ranges reached in 2015. The overall median ranges are the highest in five years for: real estate assistance/transactions, household goods shipping/storage, entire relocation cost, temporary housing, and miscellaneous expense allowance. However, ranges offered for rental assistance/transactions and travel expenses remain one range lower.

- The median amount offered by large and small firms were the same for rental assistance/transactions (\$1,000-\$2,499); mid-size firms were slightly more generous.
- Median amounts offered by mid-size and large firms were the same for real estate assistance/transactions (\$5,000-\$9,999) and miscellaneous expense allowances (\$2,500-\$4,999). Small firms were slightly less generous.
- The median amount offered for household goods shipping/storage was the same for small and mid-size firms (\$5,000-\$9,999); large firms were slightly less generous.
- Median amounts across company size were the same for the following categories: entire relocation cost (\$10,000-\$14,999), temporary housing (\$2,500-\$4,999), and travel expenses (\$1,000-\$2,499).

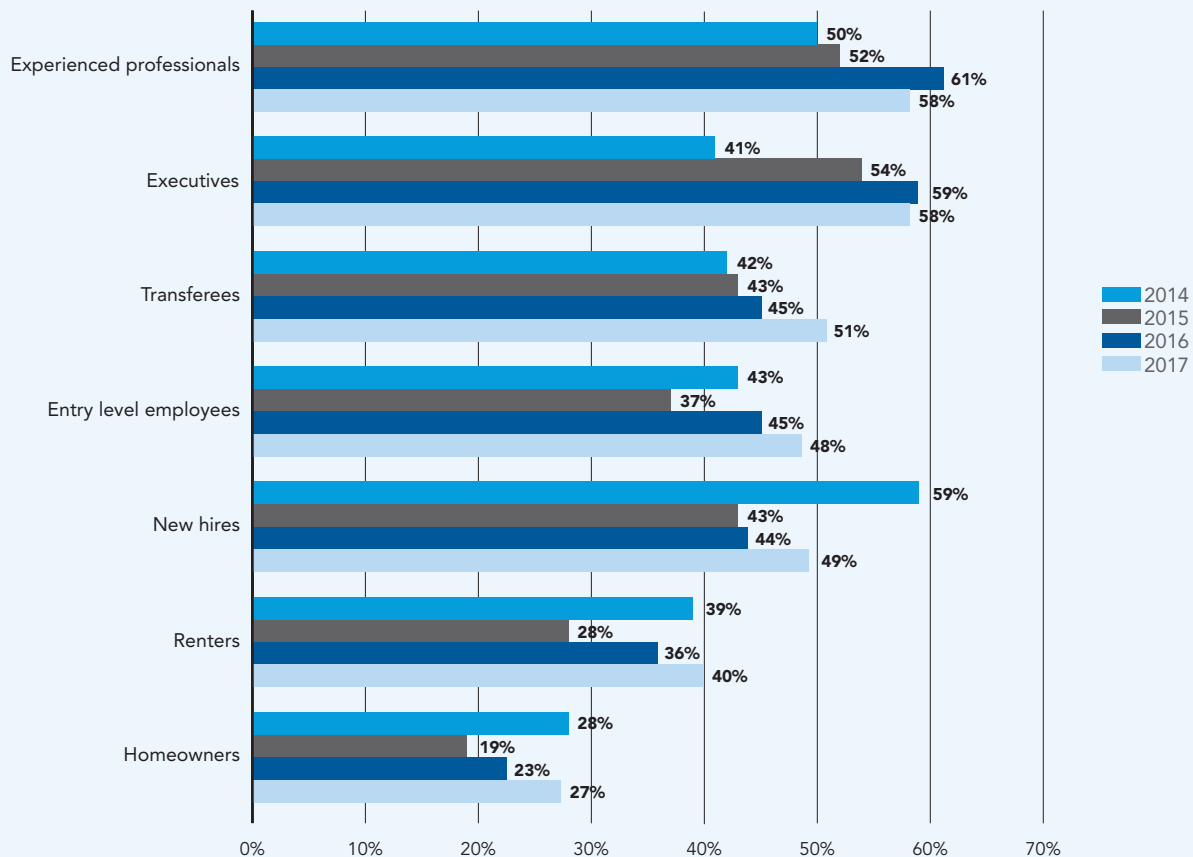


Q32a: Lump Sum Payment Application to Relocation Costs

For what types of relocation costs are lump sum payments typically offered to relocating employees?



Q32b: Types of Employees Receiving Lump Sum Payments



Q32c: Lump Sum Ranges

For the applicable cost types below, what are the typical ranges of lump sums offered? (Median amounts shown):

Median Amounts	Less than 500	500-4,999	5,000 or more	Grand Total
Real Estate Assistance/ Transactions	\$1,000-\$4,999	\$5,000-\$9,999	\$5,000-\$9,999	\$5,000-\$9,999
Household Goods Shipping/Storage	\$5,000-\$9,999	\$5,000-\$9,999	\$1,000-\$4,999	\$5,000-\$9,999
Entire Relocation Cost	\$10,000-\$14,999	\$10,000-\$14,999	\$10,000-\$14,999	\$10,000-\$14,999
Rental Assistance/ Transactions	\$1,000-\$2,499	\$2,500-\$4,999	\$1,000-\$2,499	\$1,000-\$2,499
Travel Expenses	\$1,000-\$2,499	\$1,000-\$2,499	\$1,000-\$2,499	\$1,000-\$2,499
Temporary Housing	\$2,500-\$4,999	\$2,500-\$4,999	\$2,500-\$4,999	\$2,500-\$4,999
Misc. Expense Allowances	\$1,000-\$2,499	\$2,500-\$4,999	\$2,500-\$4,999	\$2,500-\$4,999

Cost Coverage

As relocation packages grow more customized to employee and company needs, combined with the use of assistance tiers most commonly based on job/grade level or position/job title factors, for the second year we continue to look into how this impacts individual cost coverage. We asked responding firms about the composition of their relocations – what percentages were considered executive/top level, mid-level and entry level positions over the past year. Firms continue to estimate that around half of relocations were for mid-level jobs, a little more than a fourth were for executive/top level positions, and roughly a fifth were for entry level jobs, across company size. Larger firms do more relocation volume than smaller firms overall, however the employee level compositions are similar, with relocations for mid-level positions happening roughly twice as often as moves for executive/top level or entry level employees.

Employee Level Impacts Offerings

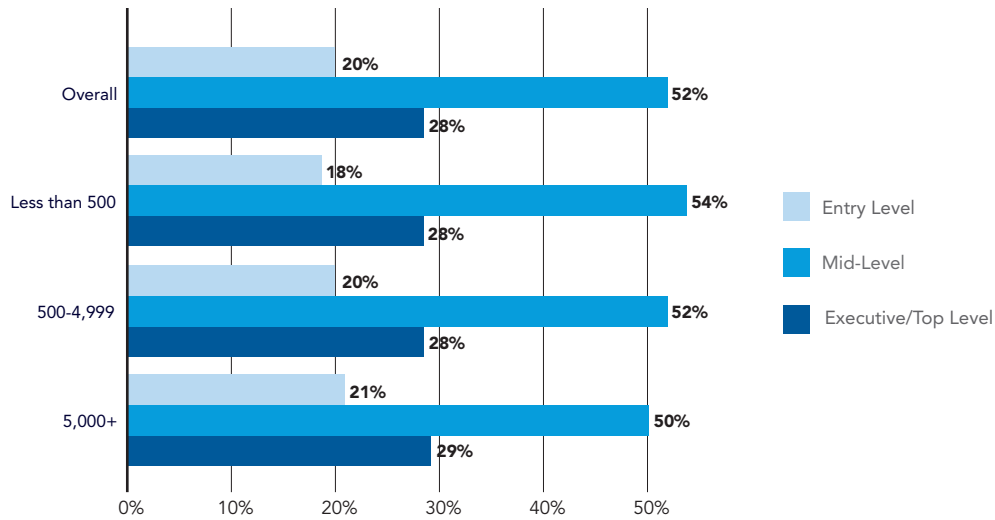
As was expected and discovered last year, cost coverage for specific items overall trends more likely to be offered for mid-level and executive/top level relocations than for entry level positions. Overall, the likelihood of firms' simply offering lump sum and not paying for specific line items did not vary significantly across relocation level at firms of the same size. The biggest differences occur when company size and relocation level are analyzed together: for entry level moves usage of lump sum payments only is similar across relocation assistance categories – it is at the mid and executive level where small and mid-size firms are more likely to elect to only use lump sum only or not reimburse costs than large firms (22% and 17% vs. 7%, mid-level; 20% and 13% vs. 7%, executive).

- Among firms, individual cost coverage offering levels vary little across company size for entry level relocations, indicating there is a uniformity to lesser coverage for these types of moves across company size.
- Variance in offerings for mid-level relocations is much more pronounced; large firms are much more likely than mid-size or small firms to offer cost coverage for packing all items (73% vs. 48%), moving an automobile (70% vs. 52% and 50%), moving a second automobile (47% vs. 27% and 29%), custom unpacking (46% vs. 36% and 28%), moving unlimited weight (43% vs. 26% and 31%), and containerized shipments (41% vs. 29%). Additionally, large firms are more likely than small to indicate covering full unpacking (42% vs. 28%) and moving recreation and lawn equipment (38% vs. 26%), while small firms are more likely than large to cover picking up goods from a secondary residence at this level (27% vs. 16%). Coverage levels are similar across company size for mid-level relocating employees for moving exercise equipment, carrying items down from the attic, moving pets, moving highly valuable objects, offering permanent/extended storage, and moving boats.
- Differences between company sizes are less pronounced at the executive/top level, with cost coverage levels similar across more than half of the items listed. Exceptions where large firms are much more likely than mid-size or small to offer cost coverage are for packing all items (82% vs. 60% and 56%), moving an automobile (78% vs. 59% and 53%), moving a second automobile (65% vs. 44% and 43%), partial/custom unpacking (51% vs. 38% and 36%), and carrying items down from attic (49% vs. 38% and 35%). Both mid-size and large firms are also much more likely than small to cover moving exercise equipment (49% and 53% vs. 38%), and large firms are the most likely to offer unpacking of all items (57%).



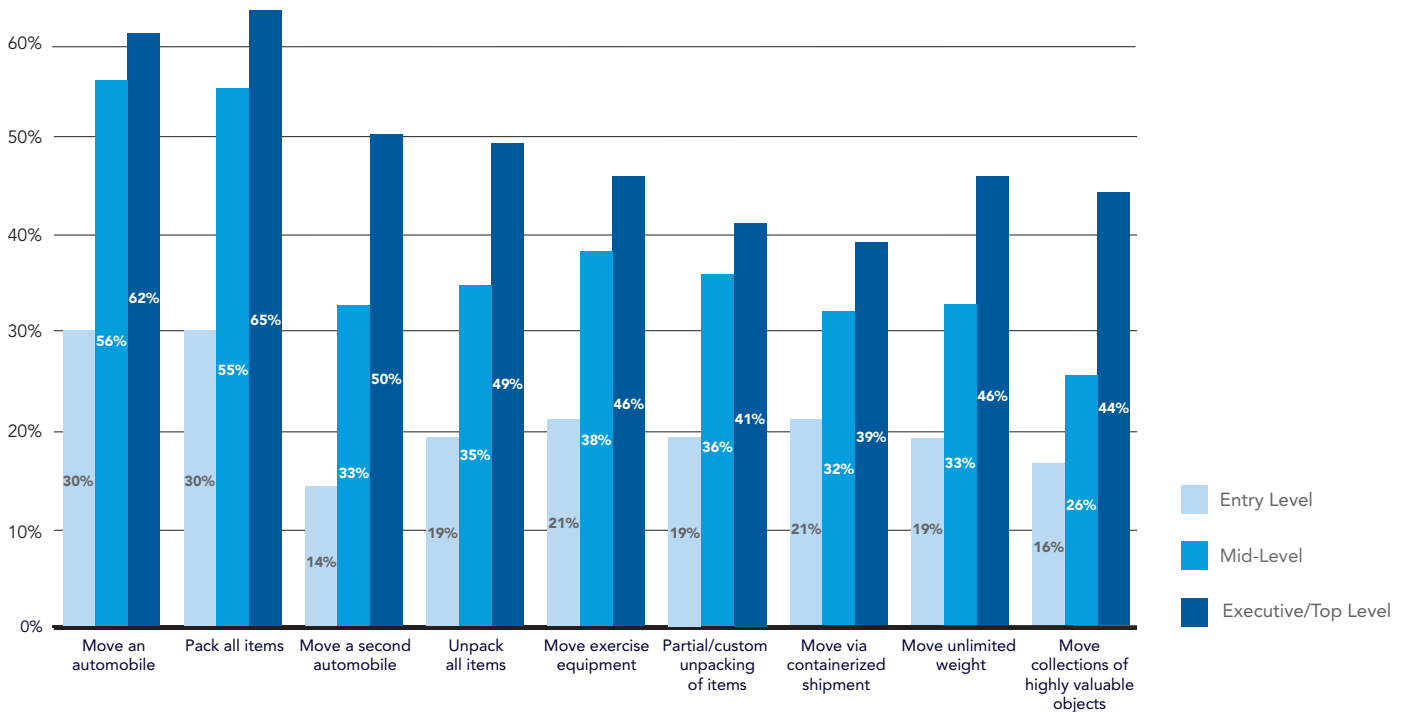
Q23: Relocating Employee Composition

In 2016, what approximate percentage of your company's relocating employees were (at origin):



Q28: Cost Coverage (Top 9)

For relocating employees (transferees OR new hires), does your company reimburse/pay to...





RISE OF LUMP SUM

Prior to the new millennium, "lump sum" as a reimbursement option for full relocations wasn't even measured on the survey, but was more an option reserved for reimbursing specific ad hoc costs related to specific aspects of moving employees in a much more limited way. The transformation of lump sum payments from a limited usage area to a method of payment flexed for many reasons (to manage specific sections of policy, full relocation payments and up to entire segments of some companies relocating workforces to simplify management) over the course of the past fifteen years largely in response to the pressures that unfolded during the Great Recession.

Specialized Assistance for Homeowners/Renters

The majority of firms, regardless of size, continue to offer assistance to homeowners/renters. To deepen our understanding of these benefits, for the second year we asked firms what types of assistance they offered across employee levels, regardless of transferee or new hire status.

Homeowners

Generally, homeowner assistance for specific items trends more likely for mid-level and executive/top level relocations than for entry-level positions. However, the overall likelihood of firms simply offering a lump sum or no homeowner assistance varied little across relocation levels. The biggest differences occur by company size. Small firms are the most likely across levels to use a lump sum or to not offer assistance, with roughly a fourth doing so, regardless of employee level.

- Offering levels for homeowner assistance vary little across company size for most entry-level relocations, although there are differences in some categories. Similar to last year, far more mid-size and large firms offer storage (27% and 31% vs. 18%) or temporary housing allowances (30% and 32% vs. 21%) compared to small firms. This year they are also more likely to offer cost coverage for home-finding trips as well (31% and 27% vs. 19%). Large firms remain more likely than small firms to offer home marketing assistance (25% vs. 14%), and this year they are roughly twice as likely as mid-size or small firms to reimburse/pay for federal tax liability (20% vs. 11% and 12%).
- For mid-level employees, similar to last year, large firms are much more willing to provide homeowner assistance across categories. The one exception is mortgage subsidies or allowances, offered by about 20% of firms across company size. Mid-size firms are much more generous than small firms across a handful of categories: offering home finding trips (52% vs. 35%), paying for home sale costs (34% vs. 22%), paying home purchase costs (31% vs. 18%), and offering buyer-value option for origin home (20% vs. 12%). But they share a similar likelihood of offering all other types of assistance for homeowners.
- Trends in assistance for executive/top level homeowners and mid-level homeowners are similar; large firms are the most likely to offer individual types of assistance across nearly every category. The only exception: assistance levels for mortgage subsidies or allowances are similar regardless of company size, with around a fourth of firms offering

this (similar to last year). While mid-size and large firms show a similar propensity for temporary housing allowances (66% vs. 56%), they are much less likely to offer the majority of other assistance items (yet they are much more likely to offer them than small firms are). Mid-size firms share similarities with small firms for: paying home purchase costs (37% vs. 27%), loss-on-sale (28% vs. 24%), mortgage subsidies/allowances (25% vs. 24%), home marketing assistance (34% vs. 25%), offering a qualified home sale program (26% vs. 19%), bonuses/incentives for employee-generated home sales (23% vs. 21%), and duplicate housing assistance (25% vs. 23%).

Renters

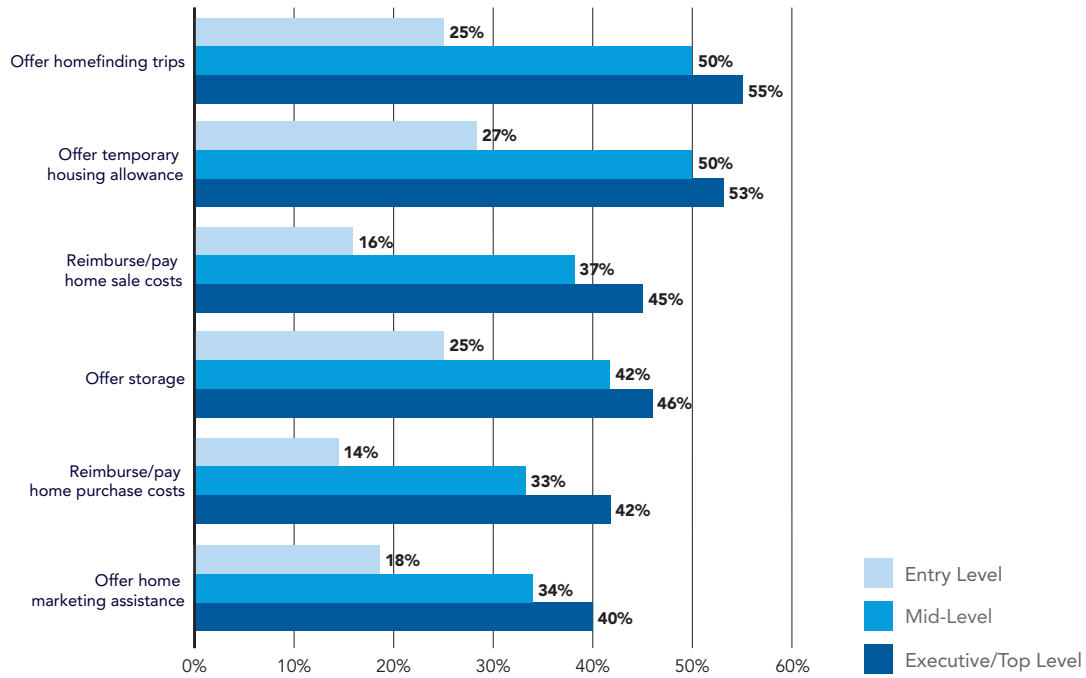
Generally, renter assistance for specific items trends more likely for mid-level and executive/top level relocations than for entry-level positions. However, the overall likelihood of firms simply offering a lump sum or no renter assistance varied little across employee levels at similar size firms. The biggest differences occur by company size. Small and mid-size firms are the most likely across levels to offer only lump sum or no assistance, with roughly a fifth doing so regardless of employee level.

- For entry-level relocations, two-thirds of the renter-assistance types are offered at similar levels across company size. However, large firms are more likely than small firms are to pay for lease cancellation (38% vs. 24%) or apartment search/finder's fees (28% vs. 18%), while mid-size firms are more likely than large firms to reimburse for hook-up fees (22% vs. 11%).
- For mid-level relocations, similar to last year, large firms are by far the most likely to offer most renter-assistance categories. Additionally, the same four renter-assistance exceptions are offered at similar frequencies across firm sizes: rental subsidies/allowances (19% vs. 21% and 22%), reimburse/pay hook-up fees (21% vs. 29% and 26%), reimburse/pay security deposits (25% vs. 27%), and reimburse/pay for furniture rental (15% vs. 17% and 18%).
- For executive/top level employees, mid-size and large firms offer the majority of renter-assistance categories roughly half the time or more, with large firms offering them far more often than mid-size or small firms overall. However, three assistance types are offered at similar levels, regardless of company size: paying for hook-up fees (25%-29%), security deposits (24%-31%), and rental subsidies or allowances (22%-25%). The one type of assistance mid-size firms offer more often than large or small firms: reimbursement/payment for furniture rental (27% vs. 15% and 17%).



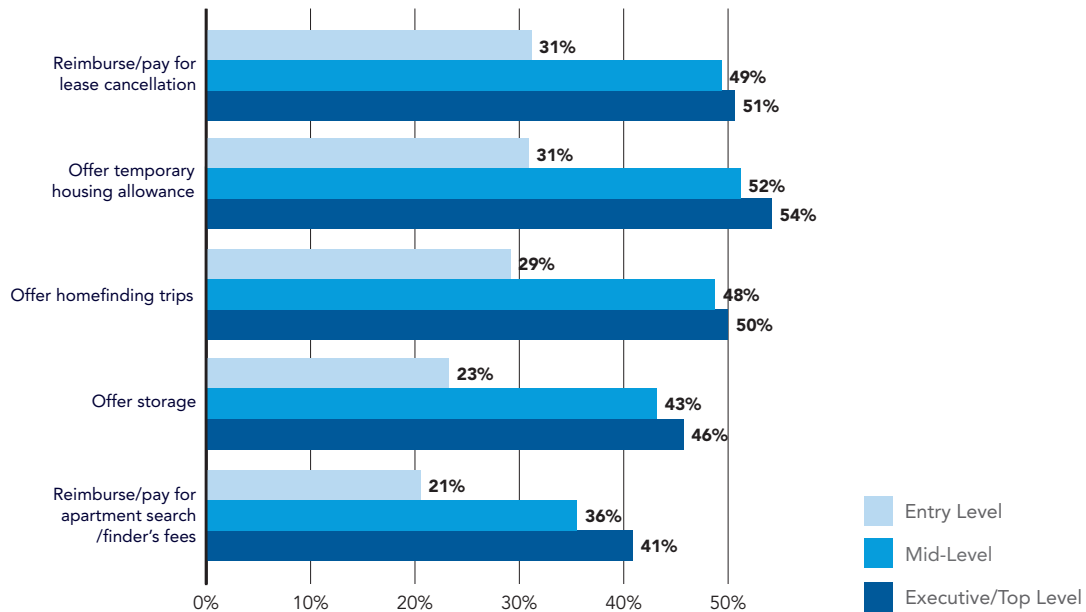
Q29: Homeowner Assistance (Top 6)

When a relocating employee (transferee OR new hire), is a homeowner who will be buying (not renting), does your company...



Q30: Home Renter Assistance (Top 5)

When a relocating employee (transferee OR new hire), will be renting (not buying), does your company...





INTERNATIONAL RELOCATION EXPLODES

Expectations for increased international relocation volume has changed dramatically over the course of 50 years. In 1977, only 18.3% of responding firms indicated expecting to relocate more employees overseas. In 2017, essentially half of firms expect to send more employees on international assignments in the coming year. As companies are increasingly global in scope and size, the need for employees to be able to transition seamlessly across borders and interact with clients and staff from all over the world is greater than ever.

International Assignments

Duration

Until 2015, the majority of firms overall reported the typical duration for international assignments was 1-3 years. After dropping in 2015 from 2014 (44% vs. 59%) it remains lower for the third straight year (47%). This year, the rest of firms are split between assignments of less than a year (31%) and three years or longer (23%).

- Trending similarly to last year, small and mid-size firms appear to favor shorter durations far more often than large firms (53% and 37% vs. 15%). However, use of short assignments now outstrips standard lengths at small firms (53% vs. 31%). At large firms, short assignments are far less common than they were two years ago (15% vs. 30%) and closer to historical norms. Overall, use of shorter assignment types by mid-size and small firms remains roughly double or more that of 3-4 years ago.
- Standard assignment lengths of 1-3 years are reported by 54% of large firms and 47% of mid-size firms, far more than reported by small firms (31%).
- Usage levels of far longer durations as "typical" among mid-size and small firms fell to roughly half of previous levels in 2015, and they remain near historical lows for a third straight year. Also for the second straight year, around a third of large firms report longer durations as typical, rebounding from 2015 (23%) to near typical averages of the previous three years and roughly double the incidence of small or mid-size firms (31% vs. 16%).

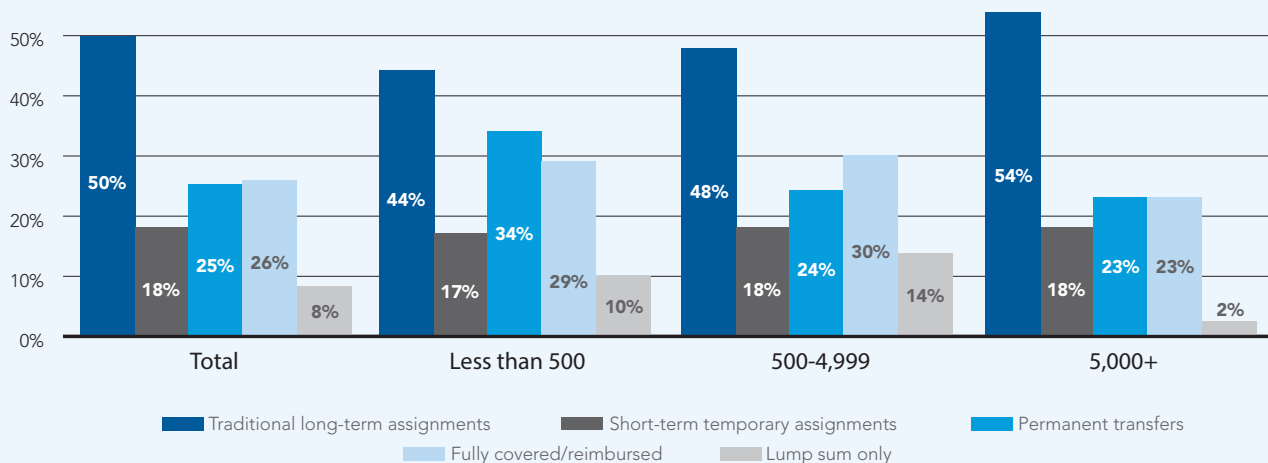
- Overall, firms estimate around five out of ten assignments were 1-3 years, over a sixth were short-term, and roughly a fourth were permanent. Almost one out of ten belonged to another type of assignment (commuter, rotational, etc.). Interestingly, over half of small and mid-size firms and 39% of large firms expect their use of short-term/temporary assignments to increase during 2017.

Destination

The United States was again one of the year's top international destinations. Relocations originating in the U.S. went to many regions, with Canada (37%), the United Kingdom (36%), Asia (31%), Western Europe (29%) and Eastern Europe (19%) rounding out the top six, including the U.S. (30%). The United States was again the top region for intraregional transfers of expatriates; both immigration to the U.S. and movement of foreign nationals within the U.S. remain markedly higher for a third year (34%+ vs. 18% in 2013). Asia ranked second for intraregional transfers (27%), followed closely by the United Kingdom (25%) and Canada (25%). The United States and Asia were top destinations for interregional transfers (35% and 35%), followed closely by Western Europe (31%), the United Kingdom (28%), Canada (20%) and Eastern Europe (20%). However, across all types of international relocations, if European destinations were combined (U.K., Eastern & Western Europe) they would eclipse all other regions.

Q44d: Average Percent of International Relocations

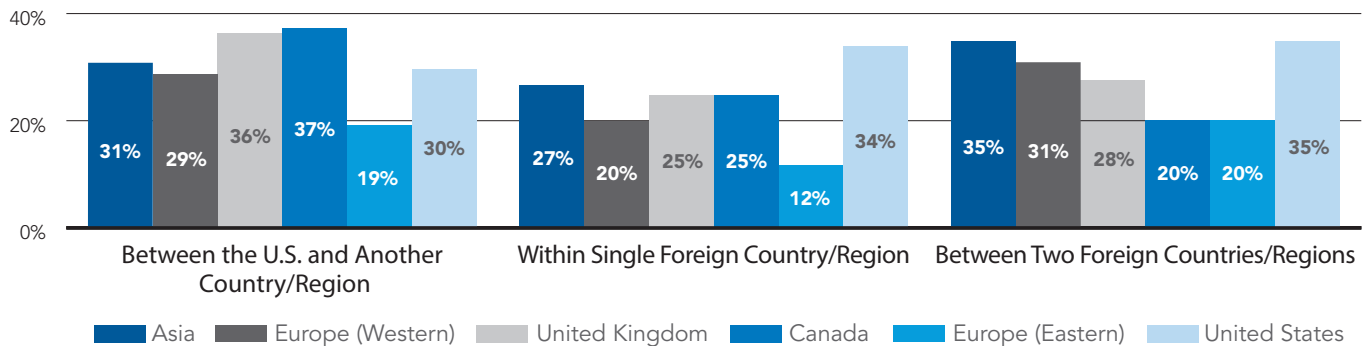
Respondents were given a list of international relocation types; the answers received indicate that...





Q12b: Most Frequent Destinations

What were the most frequent destination(s) of transfer?



Policy

The majority of firms, regardless of company size, have an average of two tiers within each of their different international policies (overall, permanent transfer, localization, and intraregional). For those with tiers in the overall policy, two of the top three criteria are position/job title (61%) and job/grade level (51%), similar to their inclusion in domestic policy (61% and 48%). Assignment length is nearly equal in weight internationally (55%), far more so than domestically (32%). These (position/job title, job/grade level, assignment length) are the top three considerations at both small and mid-size firms, while job/grade level outstrips all other factors at large firms. For small firms, new hire/current employee status is nearly equal in importance (56%), carrying more weight than at mid-size (26%) or large (26%) firms. However, assignment location/region (38%), assignment objectives (36%), and company vs. employee-initiated relocation status (28%) also carry much more weight internationally than domestically (24%, 19% & 18%), while other factors are of similar importance regardless of international or domestic policy.

For the third year in a row, the vast majority of firms, near the highest percentages historically, report differences between domestic and international policies. This remains driven primarily by more small firms allowing for policy differentiation than did prior to 2015. However, the percentages of firms offering certain benefits remain similar to the past two years, far lower than three years ago: i.e., additional tax considerations (46% vs. 42%, 44% and 61%) and allowances for children to attend certain schools (41% vs. 39%, 42% and 54%). Other policy considerations retained their stark increases compared to three years ago and are similar to the past two years as well: additional leave time (33% vs. 33%, 28% and 18%) and extended per diems (21% vs. 24%, 28% and 11%). Firms also maintained increases in financial services assistance compared to previous levels (39% vs. 18% in 2012). Many other considerations remain below previous highs, although financial assistance and security support programs are close to historical highs (39% vs.

39%, 25% vs. 31%, respectively). The percentages of firms offering higher relocation allowances (38%) or higher rental allowances (33%) internationally remain near historically normative levels as well. A policy consideration we first surveyed last year—international transportation allowance (i.e. rental car, commuting costs, etc.)—finds over a third of firms offer it (36%), similar to last year (42%).

- For the past three years, the vast majority of small firms (83%+) offered policy considerations for internationally relocating employees, far more than any year before 2015. This year, most offerings are near or above the highest historical levels except for additional tax considerations (35%). Although it jumps from last year's low (25%), it remains markedly lower than 2003-2007 when more than half of small firms offered it. While allowances for children to attend certain schools (31%) rebounds from a low (15%) last year, it simply returns to a normative level historically. Additional leave time with a visit home (37%) and increased permanent storage (29%) dip slightly from last year (40% and 36%), but remain within normative historical ranges as well. The biggest shift from last year: intercultural and language training essentially tripled (45% vs. 13%).
- At mid-size firms, the story shifts. Even as nine out of ten offer policy considerations internationally overall, nearly all categories fall near or below the lowest levels measured historically. The exceptions, which fall in historical mid-ranges, are: additional leave time (36%), financial services assistance (33%), extended per diem charges (21%), and security support (19%). The only dramatic changes compared to 2016 are: far fewer offer higher rental housing allowances (22% vs. 41%) or higher relocation allowances (27% vs. 43%).
- Policy considerations at large firms remain similar compared to last year with one exception: increased permanent storage allowances (34% vs. 43%). While roughly half or more offer the majority of policy considerations listed in the survey, the percentage for the following offerings are at or near historical lows: additional tax considerations (57%), intercultural and language training (58%), additional leave time with a visit home (53%), allowances for children to attend certain schools (54%), additional leave time (28%), and increased permanent storage allowances (34%). All the other items essentially fall at historically normative levels.

Outsourcing

More than three-fourths of companies outsourced relocation services in 2015 and 2016. These are the highest levels in more than a decade, surpassing even the peaks in 2011 and 2014. Historically, outsourcing remains near highs for large firms, in the higher range for mid-size firms, and increases even further over the historic high of 2014 (65% vs. 54%) for the second year in a row among small firms. However, large firms outsource to a greater extent and with more services than do mid-size or small firms.

Outsourcing for most service categories remained at levels similar to 2015 with slight increases. However, some categories saw significant rises: real estate sales/marketing (39% vs. 28%), real estate purchase (36% vs. 22%), and tax gross-up assistance (25% vs. 18%). These returned to near 2013 levels (42%, 40%, and 28%) after successive decreases in 2014 and 2015. Counseling about relocation planning & details (34%) and counseling about company policy (29%) increased notably from 2015 (26% and 20%), with planning & details counseling returning to the second-highest level historically. However, even with these shifts, outsourcing of most service categories fell between historical lows and mid-ranges, down from the highest levels seen in the past. As companies balance outsourcing which aspects of relocation provide the best cost/benefit based on the needs of employees and their in-house staff capabilities, services surrounding certain relocation aspects may simply be less necessary, while others are simply more likely to be handled in-house.

- Outsourcing at large firms increased dramatically for many categories compared to 2015: real estate sales/marketing (62% vs. 40%), real estate purchase (53% vs. 33%), relocation planning & details counseling (47% vs. 30%), company policy counseling (42% vs. 25%), orientation tours at new location (47% vs. 28%), expense management/tracking/reimbursement (47% vs. 32%), tax gross-up assistance (41% vs. 23%), and claims preparation and submission assistance (32% vs. 21%). However, even with these increases, outsourcing across these categories trends lower than historical highs and mid-ranges. All other categories remain similar to 2015, either at lows or near the lower mid-ranges historically.
- At mid-size firms, outsourcing across nearly all categories stayed about the same or decreased slightly from 2015; the exceptions were real estate purchase (32% vs. 23%) and company policy counseling (29% vs. 21%), which saw marked increases. Despite these increases, outsourcing runs near or at the lowest levels historically across most categories, indicating that mid-size firms are becoming more selective as to which services they outsource.

- Among small firms, most outsourcing categories increased from 2015. The most dramatic were real estate sales/marketing (26% vs. 15%), real estate purchase (26% vs. 11%), relocation planning & details counseling (24% vs. 16%), and property management (18% vs. 10%). Mid-size firms appear to be outsourcing less while small firms appear to be outsourcing more, with their rates across categories becoming more similar. Overall, outsourcing levels for small firms were at or near the highest historical levels for nearly all categories.

International

Similar to the previous three years, far more firms outsourced internationally in 2016 than did overall (84% vs. 77%). International outsourcing remains at historic highs. It is used heavily across firms of all sizes, although large firms outsource a greater variety of services than mid-size and small firms do.

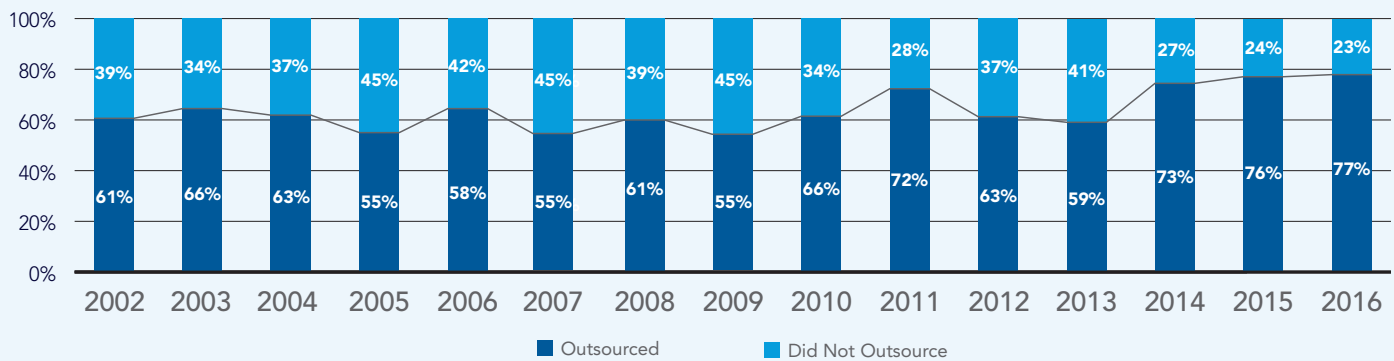
- International outsourcing saw increases across most service categories compared to 2015, with levels falling in the historical mid-range or higher. The five areas which saw the greatest increases are: contract of household goods carrier (44% vs. 32%), destination services/orientation tours (43% vs. 28%), arrangement of family's temporary accommodations (42% vs. 27%), coordination and monitoring of international shipment (41% vs. 28%), and arrangement of family's international transportation (31% vs. 22%).
- Similar to domestic trends, outsourcing across categories for small and large firms mostly increased from 2015. Mid-size firms saw either declines or stability across categories with one exception: far more outsourced destination services/orientation tours (30% vs. 18%).

Among companies that outsourced relocation services domestically, the percentage that also outsourced internationally is the second-highest historically (95%), just under the record set in 2014 (98%). For the third straight year, firms that outsource domestic services and relocate internationally almost universally outsource services abroad. Large firms continue to be the most active for outsourcing internationally: around a third or more did so across all survey categories.



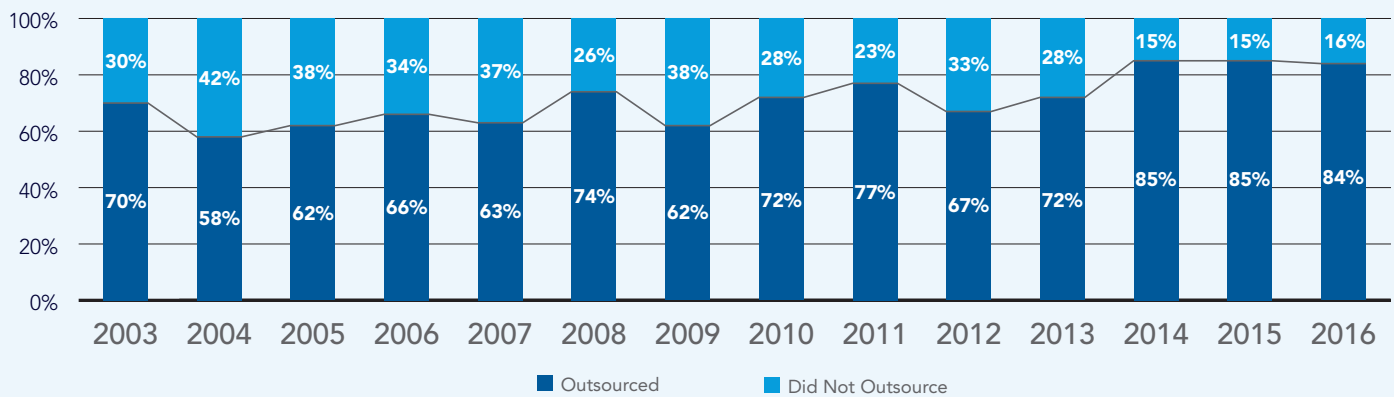
Q40: Outsourcing

Respondents were given a list of possible outsourced relocation services; the answers received indicate that...



Q44j: International Outsourcing

Respondents were given a list of possible outsourced international relocation services; the answers received indicate that...



INTERNATIONAL Snapshot

▪ **225 human resource/relocation professionals:**

- Work in human resources/personnel or relocation/mobility services departments (91%)
- Work for firms that relocate employees between countries (87%)

More Relocations Last Year, Further Increase Expected in 2017

In 2016, essentially half of international firms saw relocation volumes increase overall and internationally. Few firms saw any volume decreases. Expectations for 2017 are for more of the same with roughly half expecting further increases overall and internationally.

Budgets Continue Rebounding

In 2016, half of international firms said relocation budgets increased and around half believe budgets will increase again in 2017.

Factors Impacting Relocation Volumes

Expansion efforts (47%), lack of local talent (44%), and company growth (43%) were by far the factors international firms cited most often as affecting relocation volumes last year.

Declined Relocations

Similar to overall trends, the majority (69%) of international firms said employees declined relocation last year; the top two reasons were family issues/ties (74%) and spouse/partner employment (59%). The majority offer spouse/partner employment assistance (68%) and assistance with child care (67%), while nearly half (47%) offer elder care assistance. These percentages are in line with general survey trends.

▪ **For analysis, firms are categorized by size:**

- Small: Fewer than 500 salaried employees (18%)
- Mid-size: 500-4,999 salaried employees (37%)
- Large: 5,000+ salaried employees (45%)

Employee Status Impacts Reimbursement

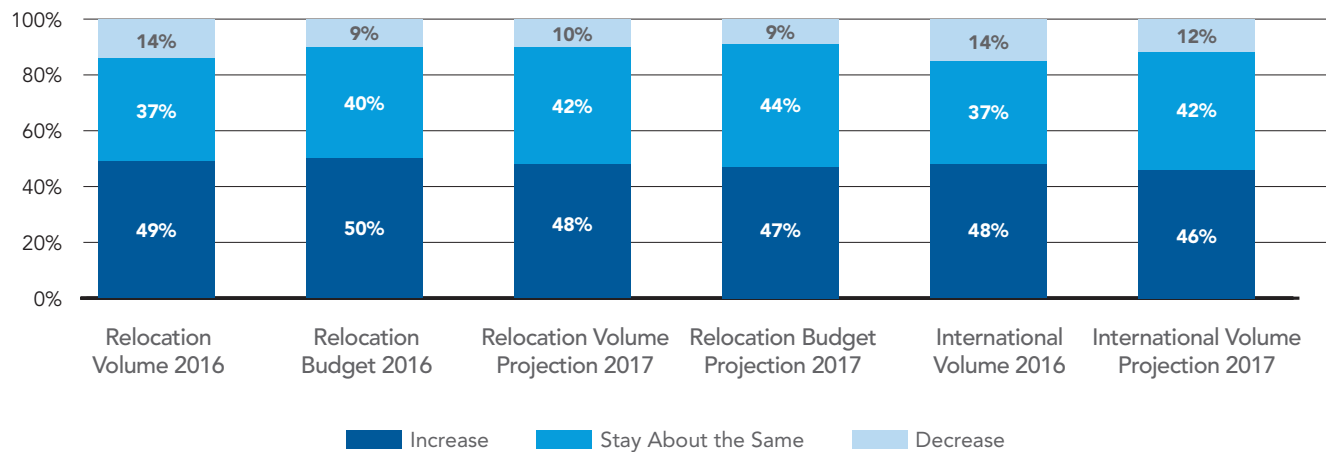
Similar to overall trends, international firms are less likely to offer full reimbursement for new hires (47%) compared to transferees (72%). Partial and full reimbursement are equally likely for new hires (45% & 47%), who are most likely to receive lump sums (55%). For transferees, full reimbursement is most likely (72%), followed by lump sums (59%) and partial reimbursement (44%).

Mobility Strategy & Assignment Diversity

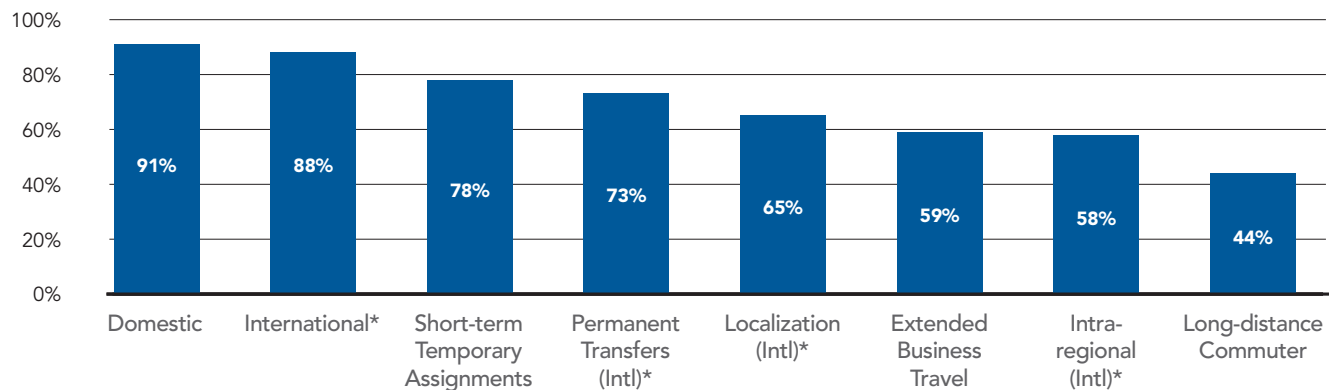
Nearly all firms (92%) follow a formal, global-mobility policy. Seventy-seven percent use alternative assignments of some kind to meet strategic business goals (43%) and to answer employee requests (40%), among other reasons. Additionally, 78% of firms follow a formal, short-term/temporary assignment policy; 59% use an extended business travel policy; and 44% maintain a policy for long-distance commuters. Long-term or "permanent" relocations are in the mix as well: over a fifth of international relocations were permanent transfers. Many firms have formal policies covering permanent transfers (73%) and localization (65%) also.



International Volume/Budget 2016 Comparisons vs. 2017 Expectations



Q18 & 44f: Formal Relocation Policies



* Percentage of those who indicated they relocate employees internationally (Q2)



SURVEY Responses

The following information is based upon the findings of Atlas® World Group's 50th Annual Survey of Corporate Relocation Policies conducted from January 14 through February 23, 2017 via the Internet. This year, 471 online questionnaires were completed. Unless otherwise noted, all data refers to domestic relocations occurring in 2016. Multiple choice questions add to 100% (+/- 1%) due to rounding, unless otherwise noted. Other questions totaling above 100% are due to multiple responses. Complete findings are as follows:

For further details and graphical representations of all the data contained in this report, please go to <http://www.atlasvanlines.com/survey>



A. RELOCATION VOLUMES & BUDGETS

1. How many employees did your company relocate in 2016?

Of total sample:	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
2% None	3%	2%	0%
26% 1 - 9	47%	19%	6%
10% 10 - 19	17%	10%	2%
13% 20 - 49	8%	21%	11%
10% 50 - 99	10%	10%	10%
15% 100 - 199	8%	19%	19%
10% 200 - 399	5%	9%	18%
14% 400 or more	2%	10%	34%
20 - 49 Median	1 - 9	29 - 49	200 - 399

2. Do you ever relocate employees between countries?

Of total sample:	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
53% % of companies answering "Yes"	31%	53%	79%

3. Is your company. . .

Of total sample:	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
21% Regional	38%	15%	8%
31% National	37%	35%	18%
48% International	24%	50%	74%

4. Compared to 2015, did the number of employees you relocated in 2016...

Of total sample:	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
12% Increase Significantly	12%	13%	13%
35% Increase Somewhat	34%	38%	32%
41% Stay About the Same	45%	40%	38%
8% Decrease Somewhat	7%	6%	13%
3% Decrease Significantly	3%	3%	4%

5. Compared to 2015, did your 2016 relocation budget...

Of total sample:	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
14% Increase Significantly	13%	16%	11%
34% Increase Somewhat	33%	39%	30%
44% Stay About the Same	46%	40%	45%
6% Decrease Somewhat	5%	3%	11%
3% Decrease Significantly	3%	2%	3%

6. Compared to 2016, do you anticipate that the number of employees your company will relocate during 2017 will...

Of total sample:	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
11% Increase Significantly	10%	11%	13%
36% Increase Somewhat	31%	42%	35%
42% Stay About the Same	43%	41%	42%
9% Decrease Somewhat	12%	5%	10%
2% Decrease Significantly	4%	1%	1%

7. Compared to 2016, do you anticipate that your relocation budget in 2017 will...

Of total sample:	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
13% Increase Significantly	13%	14%	10%
34% Increase Somewhat	32%	41%	28%
44% Stay About the Same	41%	39%	51%
8% Decrease Somewhat	11%	5%	10%
1% Decrease Significantly	3%	1%	1%

8. Did any employees decline the opportunity to relocate in 2016?*

Of total sample:	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
63% % of companies answering "Yes"	55%	62%	79%

*excludes those who don't know

9. Does declining the opportunity to relocate usually hinder an employee's career?

Of total sample:	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
28% % of companies answering "Yes"	30%	27%	26%

10a. Did your company offer additional non-standard incentives or exceptions to encourage employee relocations over the past year?

Of total sample:	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
86% % of companies indicating "Yes"	85%	88%	86%

10b. Which of the following additional non-standard incentives or exceptions did your company offer to encourage employee relocations over the past year?

Of those who offered incentives or exceptions: (See Question 10a)	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
61% Extended temporary housing benefits	60%	60%	63%
54% Relocation bonuses	56%	60%	42%
50% Cost-of-living-adjustments (COLAs) in salary at new location	49%	52%	48%
27% Guarantee of employment contract (for specified length of time) if relocation accepted	29%	31%	19%
25% Extended duplicate housing benefits	28%	21%	27%
24% Telecommuting option (one or two days each week) to curtail commuting costs	26%	25%	21%
21% Guaranteed buyout option for origin home	14%	20%	32%
20% Buyer value option for origin home	13%	20%	30%
18% Loss-on-sale protection	10%	12%	34%
15% Mortgage payoffs/loans (if property sale won't cover employee mortgage debt)	8%	25%	12%
2% Other	3%	1%	3%



10c. How often did offering the above incentives or exceptions prove successful in convincing an employee to relocate?*

Of those who offered incentives or exceptions: (See Question 10a)	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
31% Almost always	35%	29%	30%
61% Frequently	58%	63%	60%
8% Seldom	7%	7%	9%
0% Never	0%	1%	0%

*excludes not applicable/don't know responses

11. Did the number of employees declining relocation in 2016...*

Of total sample:	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
20% Increase from the 2015 level	25%	21%	12%
65% Remain about the same as the 2015 level	57%	66%	73%
15% Decrease from the 2015 level	17%	13%	15%

*excludes those who don't know

11a. What reasons did employees give for declining relocation?

Of those who answered "Yes" to Question 8:	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
69% Family issues/ties	66%	72%	71%
57% Spouse's/partner's employment	57%	59%	55%
44% Personal reasons (non-disclosed)	32%	45%	54%
37% No desire to relocate	39%	34%	38%
35% Cost of living in new location	33%	31%	41%
34% Destination location	23%	38%	41%
26% Housing/mortgage concerns	18%	31%	28%
15% Job security concerns	16%	15%	12%
2% Other	2%	1%	4%

Historic Trends

Family Issues/Ties

1982	11%
1987	30%
1992	52.5%
1997	74.6%
2007	84%
2017	69%

12a. How many employees did your company relocate in 2016 in each of the following:

Within the U.S.

Of those relocating employees: (see Question 1)	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
3% None	5%	2%	1%
30% 1-9	54%	25%	7%
13% 10-19	16%	14%	6%
17% 20-49	12%	25%	12%
9% 50-99	5%	10%	13%
28% 100 or more	7%	24%	57%
1% Don't know	0%	0%	5%

Between the U.S. and Canada

Of those relocating employees: (see Question 1)	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
55% None	72%	61%	27%
23% 1-9	14%	14%	46%
9% 10-19	7%	10%	10%
5% 20-49	2%	8%	4%
3% 50-99	3%	4%	1%
3% 100 or more	1%	4%	5%
3% Don't know	2%	1%	7%

Between the U.S. and Another Country

Of those relocating employees: (see Question 1)	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
51% None	75%	51%	20%
20% 1-9	13%	23%	26%
7% 10-19	3%	8%	11%
7% 20-49	5%	8%	8%
4% 50-99	1%	5%	8%
8% 100 or more	1%	5%	21%
3% Don't know	2%	1%	7%

Historic Trends

Median

1987	20-49
1992	20-49
1997	10-19
2003	10-19
2007	10-19
2017	20-49

(question 12 results continued)

Within a Single Foreign Country

Of those relocating employees: (see Question 1)	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
64% None	82%	68%	38%
14% 1-9	11%	11%	23%
5% 10-19	2%	6%	8%
3% 20-49	1%	4%	4%
2% 50-99	1%	2%	4%
4% 100 or more	1%	5%	6%
7% Don't know	2%	4%	17%

Between Two Foreign Countries

Of those relocating employees: (see Question 1)	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
65% None	83%	70%	35%
11% 1-9	8%	9%	15%
5% 10-19	3%	4%	10%
4% 20-49	1%	5%	7%
4% 50-99	1%	5%	7%
5% 100 or more	1%	3%	13%
6% Don't know	2%	4%	13%

12b. What were the most frequent destination(s) of transfer...

*Within the U.S.**

Of those relocating employees: (see Question 1)	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
32% Northeast	32%	28%	39%
32% South	30%	36%	31%
30% West	29%	28%	34%
29% Midwest	25%	27%	36%
18% Central	17%	15%	22%
17% Southwest	16%	15%	20%

*excludes N/A responses

*Between the U.S. and Another Country/Region**

Of those relocating employees: (see Question 1)	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
37% Canada	44%	40%	31%
36% United Kingdom	24%	43%	37%
31% Asia	29%	21%	40%
30% United States	56%	30%	17%
29% Europe (Western)	11%	30%	37%
19% Europe (Eastern)	22%	19%	17%
15% Middle East	16%	12%	16%
12% South America	20%	8%	12%
10% Australia/Pacific Rim	4%	13%	11%
8% Central America/Caribbean	5%	7%	11%
6% Africa (North)	9%	6%	5%
5% Africa (Sub-Saharan)	4%	2%	7%
4% Russia	5%	4%	4%
3% Other	2%	2%	5%

*excludes N/A responses

*Within a Single Foreign Country/Region**

Of those relocating employees: (see Question 1)	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
34% United States	31%	36%	33%
27% Asia	31%	14%	36%
25% United Kingdom	19%	24%	27%
25% Canada	35%	28%	19%
20% Europe (Western)	4%	18%	27%
14% South America	23%	10%	14%
12% Middle East	15%	14%	10%
12% Europe (Eastern)	12%	6%	17%

Historic Trends

Asia

1995	19.3%*
1997	12.9%*
1999	16%*
2007	27%
2017	31%

*Destination continent of majority of international relocations.



8%	Africa (North)	15%	6%	7%
8%	Australia/Pacific Rim	12%	6%	7%
7%	Central America/Caribbean	12%	4%	7%
6%	Africa (Sub-Saharan)	8%	8%	4%
4%	Russia	8%	6%	1%
1%	Other	0%	2%	1%

*excludes N/A responses

Between Two Foreign Countries/Regions*

Of those relocating employees: (see Question 1)	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
35%	United States	38%	37%
35%	Asia	25%	40%
31%	Europe (Western)	27%	43%
28%	United Kingdom	25%	31%
20%	Canada	19%	20%
20%	Europe (Eastern)	8%	24%
17%	South America	6%	23%
17%	Middle East	13%	17%
10%	Australia/Pacific Rim	6%	14%
9%	Central America/Caribbean	4%	11%
8%	Africa (North)	6%	7%
6%	Russia	6%	7%
6%	Africa (Sub-Saharan)	6%	6%
4%	Other	2%	6%

*excludes N/A responses

B. FACTORS IMPACTING RELOCATIONS

13. What external factors had the most significant impact on the number of your employee relocations in 2016?

Historic Trends

Of total sample:	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
13%	External conditions had no impact	17%	9%
44%	Lack of qualified people locally	47%	40%
34%	Economic conditions	32%	32%
22%	Growth of domestic competition	22%	18%
18%	Growth of international competition	12%	26%
17%	Real estate market	20%	13%
13%	Political/regulatory environment - domestic or international (i.e. U.S. election, Brexit, immigration requirements, DOL employment legislation/policies, etc.)	8%	16%
9%	Affordable Care Act/U.S. health care legislation requirements/implementation	9%	6%
7%	Natural/man-made disasters - domestic or international (i.e. Zika virus, hurricanes, earthquakes, war/civil unrest, etc.)	6%	5%
4%	Other	5%	6%

External Factors Lack of Qualified People Locally

1987	16%
1997	32.1%
2007	52%
2017	44%

Economic Candidates

1977	45.7%
1987	35%
1997	28.6%
2007	25%
2017	34%

14. What internal company conditions had the most significant impact on the number of your employee relocations in 2016?

Historic Trends

Of total sample:	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
4%	Internal conditions had no impact	6%	1%
41%	Growth of company	43%	41%
31%	Promotions/resignations	32%	26%
30%	Knowledge/skills transfers	26%	32%
25%	Expansion into new territories	24%	29%
25%	Corporate reorganization/restructuring	17%	40%
18%	Expansion of facility	21%	17%
18%	Budget constraints	19%	22%
16%	Acquisitions/mergers	9%	28%
15%	Increased production	16%	11%
13%	International expansion	12%	16%

Corporate Reorganization

1987	29%
1997	44.8%
2007	22%
2017	25%

(question 14 results continued on next page)

(question 14 results continued)

13%	Technology deployment/integration	10%	16%	12%
11%	Closing of facility	11%	13%	11%
11%	Use of frequent business travel/ telecommuting	8%	11%	14%
10%	Use of short-term assignments	7%	11%	11%
3%	Other	4%	1%	4%

15. Compared to 2015, from your company's perspective, please rate the following in 2016:

Your company's overall financial performance

Of total sample:	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
71% Better than 2015	70%	71%	72%
23% Same as in 2015	24%	26%	16%
7% Worse than 2015	6%	4%	11%

Emerging global market economies

Of total sample:	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
55% Better than 2015	50%	52%	63%
38% Same as in 2015	42%	42%	29%
7% Worse than 2015	8%	6%	7%

Developed global market economies

Of total sample:	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
55% Better than 2015	49%	55%	63%
35% Same as in 2015	44%	35%	25%
10% Worse than 2015	7%	11%	13%

The U.S. economy

Of total sample:	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
56% Better than 2015	51%	56%	63%
32% Same as in 2015	35%	32%	28%
12% Worse than 2015	14%	12%	9%

The U.S. real estate market

Of total sample:	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
56% Better than 2015	53%	50%	69%
34% Same as in 2015	33%	41%	25%
10% Worse than 2015	14%	8%	7%

16. Compared to 2016, please indicate what you anticipate for 2017:

Your company's overall financial performance

Of total sample:	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
70% Better than 2016	68%	70%	73%
25% Same as in 2016	26%	25%	25%
5% Worse than 2016	5%	5%	3%

Emerging global market economies

Of total sample:	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
55% Better than 2016	52%	50%	66%
39% Same as in 2016	42%	44%	29%
6% Worse than 2016	6%	7%	4%

Developed global market economies

Of total sample:	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
50% Better than 2016	45%	46%	60%
41% Same as in 2016	45%	41%	34%
10% Worse than 2016	10%	13%	5%



The U.S. economy

Of total sample:	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
57% Better than 2016	59%	55%	58%
30% Same as in 2016	25%	35%	32%
12% Worse than 2016	16%	11%	9%

The U.S. real estate market

Of total sample:	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
55% Better than 2016	53%	55%	58%
33% Same as in 2016	32%	34%	34%
12% Worse than 2016	15%	12%	8%

C. POLICY ADMINISTRATION

17. Does your company have a formal global mobility strategy?*

Of total sample:	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
42% Yes, basic policies and procedures	43%	47%	34%
19% Yes, extensive policies and procedures and risk mitigation	10%	18%	28%
23% Yes, extensive policies and procedures, risk mitigation, and supporting technology	18%	19%	33%
12% No, we do not have a formal global mobility strategy and have no plans to create one	25%	8%	4%
4% No, but we plan to develop a formal global mobility strategy in the next year	3%	9%	1%

*excludes N/A responses

18. Does your company have a formal policy for the following types of relocations?

Of total sample:	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
82% Domestic Relocations	68%	85%	97%
67% Short-Term/Temporary Assignments	60%	64%	79%
54% Extended Business Travel	52%	61%	48%
43% Long-Distance Commuter	45%	48%	35%

% of companies answering "Yes"

18a-1. Does your company have different tiers (or levels) within its domestic relocation policy?

Of total sample:	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
32% No tiers or levels/single policy	44%	35%	15%
24% Two tiers	33%	25%	15%
25% Three tiers	20%	26%	31%
10% Four tiers	3%	11%	17%
8% Five tiers or more	1%	3%	23%
2.4 Average Number of Domestic Tiers (of companies with tiers/levels)	1.8	2.2	3.2

18a-2. Does your company have different tiers (or levels) within its short-term/temporary assignments relocation policy?

Of those with policy: (see Question 18)	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
61% No tiers or levels/single policy	54%	58%	70%
21% Two tiers	28%	19%	15%
13% Three tiers	13%	17%	9%
4% Four tiers	5%	6%	2%
1% Five tiers or more	0%	0%	3%
1.6 Average Number of Short-Term/Temporary Tiers (of companies with tiers/levels)	1.7	1.7	1.5

18a-3. Does your company have different tiers (or levels) within its extended business travel policy?

Of those with policy: (see Question 18)	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
58% No tiers or levels/single policy	52%	54%	73%
25% Two tiers	32%	24%	16%
12% Three tiers	10%	17%	5%
3% Four tiers	6%	3%	0%
2% Five tiers or more	0%	1%	5%
1.7 Average Number of Extended Business Travel Tiers (of companies with tiers/levels)	1.7	1.7	1.5

18a-4. Does your company have different tiers (or levels) within its long-distance commuter policy?

Of those with policy: (see Question 18)	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
53% No tiers or levels/single policy	50%	47%	70%
27% Two tiers	32%	29%	15%
14% Three tiers	12%	19%	9%
3% Four tiers	4%	3%	0%
3% Five tiers or more	1%	3%	7%
1.7 Average Number of Long-Distance Commuter Tiers (of companies with tiers/levels)	1.7	1.9	1.6

18b. What are your different tiers (or levels) based on?

Of those with Domestic tiers/levels: (see Question 18a-1)	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
61% Job or Grade Level (i.e. staff, management, professional, etc.)	51%	56%	72%
48% Position/Job Title	63%	47%	38%
32% Length of Assignment	36%	38%	23%
28% New Hire/Current Employee Status	33%	28%	24%
26% Homeowner/Renter Status	21%	13%	42%
24% Assignment Location/Region	28%	31%	15%
19% Assignment Objectives (i.e. developmental, etc.)	23%	17%	18%
18% Company vs. Employee Initiated Relocation	21%	16%	17%
1% Other	1%	2%	1%

19a. Does your relocation policy incorporate any aspects of a fixed benefits/flexible benefits, core coverage/flex menu-driven policy?

Of total sample:	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
88% % of companies indicating "Yes"	85%	89%	93%

19b. Which of the following aspects of a fixed benefits/flexible benefits, core coverage/flex menu-driven policy does your relocation policy incorporate?

Of those incorporating fixed/flex elements: (see Question 19a)	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
48% Relocation benefit coverage of specific items (i.e. fixed components) dependent on employee levels/categories	39%	47%	60%
48% Relocation benefit coverage of specific items (i.e. fixed components) across all employee levels/categories	49%	50%	44%
26% Flexible use of full relocation benefit coverage amount applicable to menu of possible services (all employees)	31%	25%	20%
20% Flexible use of full relocation benefit coverage amount applicable to menu of possible services (dependent on employee level/category)	22%	23%	13%
13% Flexible use of a portion of relocation benefit coverage applicable to menu of possible services (all employees)	15%	12%	12%
11% Flexible use of a portion of relocation benefit coverage applicable to menu of possible services (dependent on employee level/category)	15%	7%	10%
1% Other	1%	0%	1%



19c. What type(s) of relocation components are considered fixed benefits within your relocation policy?

Of total sample:	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
58% Travel expenses-final move	54%	52%	69%
55% Households good shipping	49%	48%	71%
53% Temporary housing	48%	48%	65%
48% Travel expenses-home finding trip(s)	45%	42%	60%
44% Miscellaneous expense allowances	36%	42%	57%
42% Storage	36%	37%	57%
39% Real estate assistance/transaction costs-origin/selling	28%	40%	51%
34% Rental assistance/transaction costs	30%	28%	46%
34% Real estate assistance/transaction costs-destination/purchasing	18%	36%	51%
3% Other	2%	1%	7%
8% None of the above are considered fixed benefits	9%	8%	6%

20a. Does your company have a centralized relocation/mobility department/team?

Of total sample:	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
86% % of companies indicating "Yes"	76%	89%	93%

20b. Does your company's centralized relocation/mobility department/team...*

Of those with a centralized relocation/mobility department: (see Question 20a)	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
58% Manage domestic relocation programs	46%	50%	80%
56% Development/maintenance of relocation policy	46%	49%	72%
42% Manage international relocation programs	31%	34%	63%
42% Control household goods carrier selection	34%	37%	57%
36% Control additional relocation services provider(s) selection	23%	31%	55%
32% Handle visa applications/immigration policy	27%	28%	40%
30% Manage business travel programs	40%	27%	24%
30% Impact talent management/recruitment decisions/processes	30%	30%	29%
29% Handle air travel via commercial airlines	42%	30%	15%
28% Handle office relocations	35%	32%	17%
24% Development/maintenance of mobility risk management and mitigation	19%	22%	32%
24% Control freight carrier selection (air, land, sea or rail)	26%	20%	27%

*excludes those who don't know

21. Did your company use any of the following cost containment measures in relocation policy/practice over the past year?

Of total sample:	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
16% No cost containment measures beyond typical relocation policy or program utilized	20%	14%	13%
37% Use lump sum payments for relocations	39%	36%	35%
33% Cap relocation benefit amounts	28%	34%	38%
26% Limit miscellaneous expense allowance benefits (coverage items, amounts)	24%	31%	24%
26% Review/renege supplier contracts	20%	24%	37%
18% Offer short-term/extended travel/commuter arrangements rather than relocate employees	20%	14%	21%
18% Restructure policy tiers/eligibility for certain benefits (i.e. add/reduce/define tiers, implement menu-driven policy, etc.)	15%	16%	24%
17% Offer pre-decision counseling	9%	15%	28%
13% Modify COLA offering policy	9%	12%	19%
12% Tighten real estate assistance requirements	10%	13%	14%
12% Incentivize renting rather than home purchase at destination	15%	12%	8%
1% Other	1%	1%	1%

22. How many salaried (non-hourly) people are employed by your company?

Of total sample:	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
100%	36%	35%	29%

23. In 2016, what approximate percentage of your company's relocating employees were classified (at origin):*

Of total sample:	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
53% Transferees	45%	54%	60%
47% New Hires	55%	46%	40%
50% Homeowners	51%	51%	47%
40% Renters	39%	38%	43%
10% N/A (Neither Homeowners/Renters)	10%	10%	10%
28% Executives/Top Level	28%	28%	29%
52% Mid-Level Employees	54%	52%	50%
20% Entry Level	18%	20%	21%

*excludes those who don't know

24. How long does an employee have to...

a) *Accept a relocation offer**

Of total sample:	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
19% 1 week or less	21%	11%	26%
32% Up to 2 weeks	33%	30%	36%
12% Up to 3 weeks	14%	13%	9%
22% Up to 1 month	22%	27%	17%
5% Up to 2 months	3%	8%	4%
5% Up to 3 months	5%	7%	1%
4% More than 3 months	2%	5%	6%

*excludes those who don't know

b) *Report to work at the new location**

Of total sample:	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
4% 1 week or less	7%	2%	3%
15% Up to 2 weeks	16%	12%	17%
10% Up to 3 weeks	13%	8%	9%
35% Up to 1 month	34%	34%	37%
20% Up to 2 months	17%	24%	18%
11% Up to 3 months	10%	12%	10%
5% More than 3 months	2%	8%	7%

*excludes those who don't know

25. How many of the following does your company allow for an employee undergoing relocation?*

Expense-Paid House-Hunting Trips with Spouse/Partner to the New Location

Of total sample: (Average Shown)	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
1.6	1.6	1.7	1.5

*Expense-Paid Days for Employees to Use for House-Hunting Trips
(total amount allowed)*

Of total sample: (Average Shown)	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
4.1	3.4	4.4	4.7

*excludes those who don't know



26. How was the Internet/technology used for relocation-related matters in 2016?

Historic Trends

Use of Internet
for Relocation

1997	16.2%
2002	36%
2007	78%
2017	96%

Of total sample:	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
4% Did not use the Internet/technology for relocation-related matters in 2016	7%	3%	1%
80% Communicate via e-mail with relocating employees	76%	78%	89%
41% Research relocation-related matters (policy, benchmarking, etc.)	26%	42%	57%
39% Complete online forms for employee relocation	25%	40%	57%
38% Initiate/execute employee relocation services	23%	34%	60%
37% Research relocation service providers	36%	32%	43%
35% Communicate via text/messaging with relocating employees	40%	34%	28%
35% Access relocation company website for reporting or other services	21%	31%	56%
23% Audit/verify prices quoted for relocation services	24%	21%	24%
23% Utilize mobile applications from relocation providers	16%	21%	33%
19% Utilize social media/networking tools (internal/external platforms)	21%	18%	18%
1% Other	1%	1%	1%

27. Is your company utilizing “alternative assignments” (i.e. extended business travel, cross-border commuting, rotational, localization, permanent international transfers, etc.)?

Of total sample:	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
33% No, and we do not plan to do so	41%	30%	26%
27% Yes, internationally (limited basis)	19%	26%	39%
27% Yes, domestically (limited basis)	28%	27%	24%
18% Yes, domestically (frequently)	17%	19%	18%
14% Yes, internationally (frequently)	7%	19%	16%
7% No, but we plan to do so in the coming year	6%	8%	6%
1% Other	0%	1%	3%

27a. How are these “alternative assignment” arrangements incorporated into your organization’s overall employee mobility strategy?

Of those utilizing “alternative assignments”: (see Question 27)	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
42% Used in place of long-term assignments	47%	47%	30%
36% Used to meet strategic business goals	31%	28%	50%
34% Used in addition to long-term assignments	37%	30%	35%
33% Used to accommodate employee needs	31%	28%	39%
29% Used to maximize budget/corporate resources	31%	27%	30%
29% Used to develop internal talent	30%	23%	34%
28% Used in place of traditional short-term assignment arrangements	29%	31%	25%
27% Used in addition to traditional short-term assignment arrangements	26%	25%	30%
3% Other	0%	3%	5%

27b. What are the key factors that determine if an “alternative assignment” method will be used?

Of those utilizing “alternative assignments”: (see Question 27)	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
61% Business need	50%	59%	75%
52% Cost	56%	48%	51%
51% Assignment purpose	54%	50%	49%
46% Job function	57%	46%	34%
35% Career development	40%	34%	32%
34% Employment requests	36%	28%	40%
3% Other	0%	2%	6%

D. RELOCATION COSTS

28. For relocating employees (transferees OR new hires), does your company reimburse/pay to *...

Of total sample:	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
74% Pack all items	70%	69%	84%
74% Move an automobile	68%	71%	84%
58% Unpack all items	54%	60%	62%
57% Move a second automobile	54%	51%	69%
57% Move unlimited weight	56%	56%	57%
55% Move exercise equipment	52%	58%	57%
54% Partial/custom unpacking of items	50%	53%	60%
53% Move collections of highly valuable objects like statuary, paintings, antiques	51%	54%	53%
51% Move via containerized shipment	52%	48%	54%
50% Have permanent/extended storage of some possessions	52%	55%	43%
50% Carry items down from the attic	49%	48%	52%
49% Move pets	53%	50%	43%
49% Move recreation and lawn equipment	52%	46%	49%
42% Have belongings picked up from a secondary residence (summer home, relative's home, etc.)	47%	42%	35%
33% Move a boat	39%	30%	28%
32% Company does not pay for any of these items or only offers lump sum	39%	32%	23%

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

29. When a relocating employee (transferee OR new hire) is a homeowner who will be buying (not renting), does your company *...

Of total sample:	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
65% Offer homefinding trips	55%	64%	79%
63% Offer temporary housing allowance	53%	63%	73%
57% Offer storage	48%	55%	70%
56% Reimburse/pay for home sale costs	42%	53%	79%
53% Reimburse/pay for home purchase costs	38%	49%	76%
49% Offer home marketing assistance	36%	42%	73%
43% Reimburse/pay for federal tax liability	36%	41%	56%
40% Reimburse/pay for loss-on-sale	33%	36%	54%
40% Offer qualified home sale program	31%	34%	58%
38% Offer duplicate housing assistance	38%	33%	44%
36% Offer guaranteed buyout/appraised value option for origin home	30%	33%	49%
36% Offer bonuses/incentives for employee-generated home-sale	31%	31%	49%
36% Offer buyer value option for origin home	25%	34%	53%
35% Offer mortgage subsidy or allowance	36%	37%	30%
32% Company does not offer any of these benefits or only offers lump sum	42%	30%	23%

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

30. When a relocating employee (transferee OR new hire) will be renting (not buying), does your company *...

Of total sample:	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
63% Offer temporary housing allowance	57%	61%	73%
61% Reimburse/pay for lease cancellation	49%	60%	79%
61% Offer homefinding trips	54%	57%	73%
54% Offer storage	47%	53%	64%
49% Reimburse/pay apartment search or finder's fees	38%	51%	60%
36% Reimburse/pay for hook-up fees	40%	40%	28%



36% Reimburse/pay for security deposits	38%	39%	29%
31% Offer rental subsidy or allowance	35%	33%	24%
29% Reimburse/pay for furniture rental	30%	36%	21%
29% Company does not offer any of these benefits or only offers lump sum	37%	30%	18%

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

31. To what extent does your company reimburse relocation expenses:

Historic Trends

Full

Reimbursement

1977	85.9%
1987	82%
1997	(T)72% (N)44.6%
2003	(T)70% (N)56%
2007	(T)55% (N)42%
2017	(T)65% (N)42%

Partial Reimbursement

1977	12.2%
1987	16%
1997	(T)8.6% (N)22%
2003	(T)25% (N)38%
2007	(T)30% (N)43%
2017	(T)48% (N)48%

<i>Transferees</i>		Less than 500		500-4,999		5,000+ Salaried	
Of total sample:		Salaried Employees		Salaried Employees		Employees	
65%	Full reimbursement of relocation expenses	65%		67%		63%	
55%	Lump sum payments	54%		51%		61%	
48%	Partial reimbursement based on salary, position, policy tier, etc.	48%		45%		51%	
13%	No reimbursement of relocation expenses	15%		13%		12%	

<i>New Hires</i>		Less than 500		500-4,999		5,000+ Salaried	
Of total sample:		Salaried Employees		Salaried Employees		Employees	
53%	Lump sum payments	56%		43%		60%	
48%	Partial reimbursement based on salary, position, policy tier, etc.	46%		47%		50%	
42%	Full reimbursement of relocation expenses	37%		42%		48%	
19%	No reimbursement of relocation expenses	21%		20%		15%	

32. What approximate percentage of your relocations were:

<i>Payment Type</i>		Less than 500		500-4,999		5,000+ Salaried	
Of total sample:		Salaried Employees		Salaried Employees		Employees	
44%	Fully reimbursed/cost covered by company	40%		42%		53%	
24%	Lump sum payment only (entire relo)	28%		22%		21%	
24%	Partially reimbursed by company	24%		25%		21%	
8%	Not reimbursed (employee paid)	8%		11%		4%	

<i>Category (Domestic Only)</i>		Less than 500		500-4,999		5,000+ Salaried	
Of total sample:		Salaried Employees		Salaried Employees		Employees	
75%	Traditional/permanent relocations	77%		67%		81%	
14%	Short-term relocation assignments	14%		15%		12%	
8%	Alternative assignments (i.e. rotational, commuter, etc.)	6%		12%		5%	
4%	Other	2%		6%		2%	

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: (see Question 31)		Less than 500		500-4,999		5,000+ Salaried	
		Salaried Employees		Salaried Employees		Employees	
57%	Miscellaneous expense allowances	52%		50%		71%	
55%	Travel expenses (i.e. housing hunting trips, final move, etc.)	55%		58%		52%	
50%	Temporary housing	48%		52%		51%	
44%	Household goods shipping/storage	53%		46%		32%	
41%	Entire relocation cost	41%		45%		37%	
33%	Rental assistance/transactions	41%		32%		26%	
28%	Real estate assistance/transactions	29%		27%		27%	
5%	Other	4%		4%		6%	

32b. What types of relocating employees and relocation types most commonly receive lump sum payments?

Of those offering lump sum payments: (see Question 31)		Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
<i>Employee Types</i>				
58%	Experienced professionals	65%	54%	53%
58%	Executives	66%	59%	44%
51%	Transferees	44%	58%	51%
49%	New hires	50%	39%	60%
48%	Entry level employees	37%	44%	67%
40%	Renters	41%	34%	48%
27%	Homeowners	22%	25%	36%
2%	Other	1%	3%	2%
<i>Relocation Types</i>				
87%	Domestic relocations	86%	81%	94%
39%	Short-term/temporary assignments	36%	42%	41%
34%	International long-term assignments	29%	41%	33%
16%	Alternative assignment types (i.e. commuters, EBTs, etc.)	16%	17%	17%
1%	Other	1%	1%	1%

32c. For the applicable costs types below, what are the typical ranges of the lump sums offered?

Of those offering lump sum payments: (see Question 31)		Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
<i>Real estate assistance/transactions</i>				
26%	No lump sum offered for this benefit	26%	20%	33%
22%	Less than \$5,000	27%	24%	12%
14%	\$5,000-\$9,999	17%	15%	8%
29%	\$10,000 or more	25%	32%	33%
8%	Don't know	5%	9%	14%
<i>Household goods shipping/storage</i>				
18%	No lump sum offered for this benefit	10%	15%	32%
31%	Less than \$5,000	38%	31%	21%
20%	\$5,000-\$9,999	19%	26%	13%
23%	\$10,000 or more	26%	20%	23%
8%	Don't know	7%	8%	11%
<i>Entire relocation cost</i>				
9%	No lump sum offered for this benefit	5%	8%	16%
13%	Less than \$5,000	16%	17%	4%
19%	\$5,000-\$9,999	22%	13%	22%
53%	\$10,000 or more	50%	55%	52%
7%	Don't know	7%	7%	6%
<i>Rental assistance/transactions</i>				
23%	No lump sum offered for this benefit	21%	18%	31%
28%	Less than \$2,500	30%	30%	21%
19%	\$2,500-\$4,999	21%	20%	14%
22%	\$5,000 or more	22%	22%	21%
9%	Don't know	6%	10%	14%



Travel expenses

Of those offering lump sum payments: (see Question 31)	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
11% No lump sum offered for this benefit	7%	12%	15%
40% Less than \$2,500	43%	39%	36%
20% \$2,500-\$4,999	24%	16%	20%
20% \$5,000 or more	19%	24%	16%
9% Don't know	7%	9%	13%

Temporary housing

Of those offering lump sum payments: (see Question 31)	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
12% No lump sum offered for this benefit	11%	12%	15%
22% Less than \$2,500	21%	27%	17%
21% \$2,500-\$4,999	25%	18%	20%
34% \$5,000 or more	33%	34%	35%
11% Don't know	10%	9%	13%

Miscellaneous expense allowances

Of those offering lump sum payments: (see Question 31)	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
10% No lump sum offered for this benefit	11%	9%	8%
35% Less than \$2,500	41%	38%	26%
18% \$2,500-\$4,999	17%	19%	18%
29% \$5,000 or more	23%	25%	41%
9% Don't know	8%	9%	8%

32d. How is lump sum spending/allocation per employee tracked by your company?

Performed by:

Of those offering lump sum payments: (see Question 31)	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
53% Human Resources staff member	65%	53%	37%
36% Finance/procurement department	48%	41%	17%
33% Relocating employee	39%	35%	24%
33% Relocation team staff member	31%	34%	36%
16% Outsourced	8%	15%	28%
1% Other	0%	2%	2%
3% Not Tracked	1%	1%	7%

Method:

Of those offering lump sum payments: (see Question 31)	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
53% Submission of expense reports	70%	50%	36%
36% Excel spreadsheet	47%	36%	23%
31% In-house software report	31%	39%	21%
26% Online reporting tool/mobile app	32%	27%	19%
18% Outsourced	9%	14%	34%
3% Other	3%	1%	7%
4% Not Tracked	1%	3%	9%

E. EMPLOYEE, SPOUSAL & ASSISTANCE ISSUES

33. What is the age range of your most frequently relocated salaried employee?*

Of total sample:	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
11% Less than 30 years	13%	9%	10%
29% 30 - 35 years	34%	28%	22%
28% 36 - 40 years	22%	28%	37%
19% 41 - 45 years	15%	20%	24%
9% 46 - 50 years	10%	10%	7%
4% More than 50 years	5%	4%	1%

Historic Trends

Over 40 Years	
1977	11.7%
1987	13%
1997	11.9%
1999	23.8%
2003	30%
2007	29%
2017	32%

*excludes those who don't know

34. Does your organization perform candidate assessments prior to relocation offers?

Of total sample:	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
25% No, candidate assessments are not performed	24%	21%	32%
40% Yes, for all relocations	44%	46%	29%
16% Yes, for domestic relocations	18%	19%	8%
14% Yes, on an "as needed/requested" basis	12%	9%	22%
14% Yes, for new hires	20%	13%	7%
11% Yes, for international relocations	6%	11%	16%
10% Yes, for transferees	11%	11%	6%
6% Yes, based on policy tier/reimbursement level	8%	4%	4%
2% Other	0%	2%	5%

35. In 2016, what approximate percentage of your relocations involved:*

Of total sample: (Average Percent)	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
23% Female employees	22%	21%	26%
27% Wife/female partner (Trailing spouse)	24%	27%	31%
23% Husband/male partner (Trailing spouse)	26%	20%	23%
37% Employees with children	34%	35%	44%

*excludes those who don't know

36. What assistance does your company provide to the relocating employee for elder care?

Of total sample:	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
49% No elder care assistance	43%	48%	57%
27% Allow flexible scheduling or telecommuting	32%	31%	18%
26% Provide paid personal leave days	32%	28%	17%
22% Provide list of nursing homes and/or day-care centers	21%	22%	22%
18% Allow employee to use pre-tax dollars for outside care	19%	17%	18%
13% 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	15%	11%	13%
2% Other	2%	2%	3%

37. What assistance does your company provide to the relocating employee for childcare?

Of total sample:	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
35% No childcare assistance	36%	31%	38%
30% Provide list of childcare providers/services and/or agencies	30%	29%	32%
28% Provide list of local schools/educational options	31%	24%	30%
28% Allow flexible scheduling or telecommuting	30%	31%	21%
26% Provide paid personal leave days	30%	30%	17%
23% Allow employee to use pre-tax dollars for outside care	26%	17%	27%
19% Reimburse childcare costs	18%	22%	15%
3% Other	2%	4%	2%

Historic Trends

Relocation Affected by Spouse/Partner Employment

1977	17.8%
1977	22%
1997	52%
2007	52%
2017	62%

38. How frequently is an employee's relocation affected by the employment status of that employee's spouse/partner?*

Of total sample:	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
16% Almost always	20%	14%	13%
46% Frequently	45%	51%	42%
36% Seldom	33%	32%	45%
2% Never	3%	3%	1%

*excludes those who don't know



39. Does your company allow the hiring of spouses of employees?*

Historic Trends

Of total sample:	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
58% Yes, but not in the same department/division	51%	56%	71%
19% Yes, without restriction	22%	18%	16%
10% Yes, but not at the same location	12%	10%	8%
13% No	16%	16%	5%

*excludes those who don't know

Willing to Hire Spouse

1992	85.1%
1997	87.5%
2002	84%
2007	87%
2017	87%

39a. Does your company assist an employee's spouse or partner in finding employment in the new location?

Historic Trends

Of total sample:	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
62% % of companies indicating "Yes"	62%	61%	65%

Offer Spouse/ Partner Employment Assistance

1977	9.8%
1987	15%
1997	21%
2007	33%
2017	62%

39b. How does your company assist an employee's spouse or partner in finding employment in the new location?

Of those who did not answer "No assistance" to Question 39a:	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
46% Provide networking assistance	52%	45%	40%
36% Pay for outplacement/career services from an outside firm	27%	37%	45%
31% Provide resume preparation assistance	30%	31%	32%
27% Find employment within company	30%	28%	23%
24% Provide interviewing skills training	30%	22%	19%
23% Reimburse for career transition expenses (i.e. interview trips, certifications, etc.)	21%	25%	25%
21% Find employment outside company	22%	26%	15%
4% Other	2%	4%	8%

39c. What approximate percentage of relocated employees with a spouse or partner used this employment assistance?*

Of those who did not answer "No assistance" to Question 39a:	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
30% Average Percent	30%	32%	26%

*excludes those who don't know

F. SUPPLIER MANAGEMENT

40. Which of the following services did your company outsource to a relocation service, HRO or brokerage firm in 2016?

Of total sample:	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
23% Did not use a relocation service, HRO or brokerage firm in 2016	35%	23%	10%
39% Real estate sales/marketing	26%	33%	62%
36% Real estate purchase	26%	32%	53%
34% Counseling about the planning and details of relocation	24%	34%	47%
29% Contract of household goods carrier	23%	28%	39%
29% Counseling about company policy	18%	29%	42%
27% Coordination and monitoring of shipment	17%	23%	43%
26% Management of full relocation program	21%	20%	40%
26% Orientation tours at new location	15%	18%	47%
25% Expense management/tracking/reimbursement services	14%	19%	47%
25% Tax gross-up assistance	14%	22%	41%
22% Arrangement of family's transportation and accommodations	15%	22%	31%
21% Assistance with employee claims preparation and submission	16%	18%	32%

(question 40 results continued on next page)

(question 40 results continued)

19%	Audit and/or payment of invoice(s)	13%	17%	30%
19%	Property management	18%	14%	25%
18%	Compensation services (i.e. payroll arrangements, tax compliance, etc.)	15%	18%	22%
15%	Supplementary services (appliances, cleaning, etc.)	12%	16%	19%
1%	Other	1%	1%	3%

40a. Which department(s) at your company select a relocation service, HRO or brokerage firm?

Of those where company outsourced: (see Question 40)		Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
59%	Human Resources	63%	69%	44%
44%	Relocation/Mobility Services	32%	33%	67%
31%	Executive Management	43%	33%	19%
21%	Procurement	17%	15%	32%
3%	Other	5%	2%	2%

41. Are carrier transportation expenses paid directly by the company or paid by the employee and then reimbursed?

Transferees

Of total sample:		Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
78%	Paid directly by the company	69%	75%	91%
37%	Paid by the employee and then reimbursed	48%	35%	26%
19%	Paid by the employee and not reimbursed	20%	21%	16%

New Hires

Of total sample:		Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
67%	Paid directly by the company	57%	64%	84%
39%	Paid by the employee and then reimbursed	48%	42%	24%
20%	Paid by the employee and not reimbursed	24%	19%	16%

Historic Trends

Employee Involvement

1987	53%
1997	47.7%
2007	38%
2017	46%

42. Who selects the household goods carrier for your employee's relocation?

Of total sample:		Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
36%	The company	28%	38%	45%
24%	The company and employee together	29%	26%	16%
22%	The employee	34%	23%	7%
16%	A relocation firm	10%	12%	29%
1%	Other	0%	1%	3%

42a. Which department(s) at your company select the household goods carrier for your employee's relocation?

Of those where company is involved in selection: (see Question 42)		Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
59%	Human Resources	67%	70%	34%
39%	Relocation/Mobility Services	25%	28%	68%
22%	Executive Management	31%	21%	12%
19%	Procurement	14%	18%	27%
2%	Other	2%	0%	4%

43. What are the biggest operational challenges/concerns your organization is facing in relocation?*

Of total sample:		Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
40%	Service scalability (big or small/tailoring to relocating employee)	41%	45%	32%
26%	Technology support	25%	26%	28%
26%	Analytics/big data/reporting	20%	27%	33%
25%	Transportation methodology changes	29%	28%	16%



20%	Supply chain strength/stability	22%	20%	18%
19%	Data privacy	23%	15%	19%
18%	Driver shortages	16%	14%	26%
7%	Other	6%	7%	9%

*excludes those who indicate no concerns/none of the above/don't know

G. INTERNATIONAL

44a. Compared to 2015, did the number of employees your company relocated internationally during 2016...

Of those who answered "Yes" to Question 2:	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
15%	24%	15%	11%
36%	35%	33%	39%
36%	35%	36%	36%
9%	4%	9%	11%
4%	2%	7%	3%

44b. Compared to 2016, do you anticipate that the number of employees your company will relocate internationally during 2017 will...

Of those who answered "Yes" to Question 2:	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
12%	22%	13%	8%
36%	29%	41%	36%
40%	33%	38%	43%
10%	16%	5%	12%
2%	0%	3%	1%

Historic Trends

Increase	
1977	18.3%
1992	31.9%
1997	36.7%
2007	29%
2017	49%

44c. What is the typical international relocation assignment duration for employees at your company?

Of those who answered "Yes" to Question 2:	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
6%	16%	5%	2%
25%	37%	33%	13%
47%	31%	47%	54%
23%	16%	16%	31%

Historic Trends

Duration-1977	
<1yr.	6.1%
1-3yrs.	54.3%
>3yrs.	39.6%

44d. In 2016, what approximate percentage of your international relocations were:*

Of those who answered "Yes" to Question 2: (Average Percent)	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
50%	44%	48%	54%
18%	17%	18%	18%
25%	34%	24%	23%
7%	13%	7%	6%
8%	10%	14%	2%
26%	29%	30%	23%

*excludes those who don't know

44e. Compared to 2016, do you expect the number of international short-term/temporary assignments (less than 12 months) in 2017 to . . .

Of those who answered "Yes" to Question 2:	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
11%	24%	7%	8%
37%	29%	49%	30%
44%	37%	37%	54%
5%	8%	2%	7%
2%	2%	5%	1%

44f. Does your company have a formal policy for the following?

International Policies

Of those who answered "Yes" to Question 2:	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
86% International Relocation Assignments (traditional length 1-3 years)	76%	86%	91%
71% Permanent Transfers (international)	69%	65%	77%
63% Localization (international)	65%	64%	60%
56% Intra-Regional Assignments (international)	67%	51%	56%
% of companies answering "Yes"			

44g-1. Does your company have different tiers (or levels) within its international relocation policy?

Of those who answered "Yes" to Question 2:	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
48% No tiers or levels/single policy	43%	44%	53%
22% Two tiers	27%	27%	14%
20% Three tiers	18%	22%	19%
8% Four tiers	11%	5%	8%
3% Five tiers or more	0%	1%	6%
2.0 Average Number of International Tiers (of companies with tiers/levels)	2.0	1.9	2.0

44g-2. Does your company have different tiers (or levels) within its permanent transfers (international) policy?

Of those with policy: (see Question 44f)	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
47% No tiers or levels/single policy	40%	41%	55%
21% Two tiers	20%	28%	16%
19% Three tiers	26%	15%	19%
10% Four tiers	11%	15%	5%
4% Five tiers or more	3%	2%	5%
2.0 Average Number of Permanent Transfer Tiers (of companies with tiers/levels)	2.2	2.1	1.9

44g-3. Does your company have different tiers (or levels) within its localization (international) policy?

Of those with policy: (see Question 44f)	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
46% No tiers or levels/single policy	39%	34%	59%
26% Two tiers	30%	38%	12%
19% Three tiers	15%	19%	20%
8% Four tiers	15%	8%	3%
3% Five tiers or more	0%	2%	5%
2.0 Average Number of Localization Tiers (of companies with tiers/levels)	2.1	2.1	1.8

44g-4. Does your company have different tiers (or levels) within its intra-regional assignments (international) policy?

Of those with policy: (see Question 44f)	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
44% No tiers or levels/single policy	39%	36%	53%
23% Two tiers	27%	34%	13%
20% Three tiers	21%	20%	18%
8% Four tiers	12%	7%	7%
5% Five tiers or more	0%	2%	9%
2.1 Average Number of Intra-Regional Tiers (of companies with tiers/levels)	2.1	2.0	2.1



44h-1. What are your different tiers (or levels) based on?

Of those with <i>International</i> tiers/levels: (see Question 44g-1)	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
61% Job or Grade Level (i.e. staff, management, professional, etc.)	56%	51%	74%
55% Length of Assignment	60%	60%	48%
51% Position/Job Title	64%	56%	39%
38% Assignment Location/Region	40%	47%	28%
36% Assignment Objectives (i.e. developmental, etc.)	40%	30%	39%
32% New Hire/Current Employee Status	56%	26%	26%
28% Company vs. Employee Initiated Relocation	32%	26%	28%
23% Homeowner/Renter Status	20%	7%	39%
1% Other	0%	0%	2%

44i. Comparing your international relocation policy to your domestic relocation policy, does your company's international relocation policy offer...

Of those who answered "Yes" to Question 2:	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
12% No difference between international and domestic relocation policies	16%	9%	11%
46% Additional tax considerations	35%	38%	57%
43% Intercultural and language training	45%	22%	58%
42% Additional leave time that includes at least one visit back to the employee's home country	37%	33%	53%
41% Allowances for children to attend certain schools	31%	30%	54%
39% Financial services assistance (i.e. bank account setup, specialized compensation arrangements)	37%	33%	45%
38% Higher relocation allowances	47%	27%	43%
36% International transportation allowance (i.e. rental car, commuting costs, etc.)	31%	27%	45%
33% Higher rental housing allowance	33%	22%	42%
33% Additional leave time	37%	36%	28%
31% Increased allowances for permanent storage	29%	28%	34%
25% Security support program	22%	19%	31%
21% Extended per diem charges	24%	21%	20%
9% Allowances for elder care	12%	10%	8%
4% Other	4%	5%	3%

Historic Trends

International Relocation Policy Extended Per Diem	
1995	46.9%
1999	37.2%
2003	20%
2007	22%
2017	21%
Increased Permanent Storage	
1995	63.6%
1999	60.4%
2003	49%
2007	37%
2017	31%

44j. Which of the following international services did your company outsource to a relocation service, HRO or brokerage firm in 2016?

Of those who answered "Yes" to Question 2:	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
16% Did not use a relocation service, HRO or brokerage firm for international relocation services in 2016	22%	15%	13%
44% Contract of household goods carrier for international shipping	39%	40%	50%
44% Counseling about the planning and details of relocating internationally	43%	42%	46%
43% Visa and immigration services	49%	31%	50%
43% Destination services/orientation tours in host country	29%	30%	60%
42% Arrangement of family's temporary accommodations	37%	29%	54%
41% Coordination and monitoring of international shipment	31%	31%	54%
39% Securing rental property in host country	27%	29%	53%
36% Expense management/tracking/reimbursement services	27%	29%	45%
34% Intercultural and language training	22%	22%	50%
34% Counseling about company policy concerning international relocation	31%	31%	37%
32% Repatriation services	22%	22%	46%
31% Arrangement of family's international transportation	25%	21%	43%
30% Management of international relocation program	24%	29%	33%

(question 44 results continued on next page)

(question 44 results continued)

27%	Property management of home at origin	27%	20%	32%
26%	Compensation services (i.e. payroll arrangements, tax compliance, etc.)	24%	22%	30%
25%	International real estate (sales/marketing and/or purchases)	27%	19%	30%
1%	Other	0%	1%	1%

44k. How does your company assist an internationally relocated employee's spouse or partner in finding employment in the new location?

Of those who answered "Yes" to Question 2:	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
28% No assistance	29%	23%	31%
29% Pay for outplacement/career services from an outside firm	27%	24%	33%
27% Provide networking assistance	27%	27%	27%
26% Pay for work visa in new location	33%	29%	21%
24% Provide resume preparation assistance	33%	19%	24%
19% Reimburse for career transition expenses (i.e. interview trips, certifications, etc.)	25%	14%	21%
19% Find employment within company	22%	23%	14%
17% Provide interviewing skills training	14%	19%	18%
14% Find employment outside company	22%	15%	10%
4% Other	2%	3%	6%

44l. In 2016, what reasons were cited for an employee declining an international relocation or for an international relocation to fail?

Of those who answered "Yes" to Question 2:	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
14% No international relocations declined or failed	22%	12%	13%
47% Family issues/ties	43%	50%	47%
31% Lack of spousal/partner assistance	35%	36%	25%
29% Personal reason (non-disclosed)	25%	31%	28%
27% Lack of adaptability by the spouse/partner	22%	26%	31%
23% Financial issues/concerns	31%	21%	22%
14% Safety concerns (i.e. war/terrorism/political unrest/etc.)	16%	16%	11%
12% Lack of adaptability by employee	14%	16%	8%
10% Job performance issues	14%	15%	5%
9% Host country infrastructure inadequacies	12%	9%	8%
9% Illness	12%	7%	8%
1% Other	0%	1%	1%
15% Don't know	8%	12%	22%

H. CORPORATE/RESPONDENT PROFILE

Historic Trends

Service Firms	
1977	21.2%
1987	37%
1997	32.2%
2007	43%
2017	45%

45. Which one of the following most accurately describes your company's business classification?

Of total sample:	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
37% Service (Profit) (includes educational services, healthcare, high-tech, etc.)	42%	40%	29%
24% Manufacturing/Processing	24%	20%	29%
10% Financial/Insurance/Real Estate	6%	12%	13%
10% Wholesale/Retail	7%	6%	18%
8% Service (Non-profit) (includes religious institutions, charities, etc.)	11%	7%	4%
7% Government/Military/Public Administration	7%	8%	5%
4% Other	4%	7%	3%



46. What were your company's annual sales for 2016?*

Of total sample:	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
12% Less than \$25 million	27%	5%	2%
12% \$26 - \$50 million	21%	9%	4%
10% \$51 - \$99 million	14%	11%	2%
10% \$100 - \$249 million	13%	14%	1%
10% \$250 - \$499 million	13%	15%	0%
8% \$500 - \$749 million	8%	10%	5%
7% \$750 million - \$1 billion	1%	14%	5%
33% Over \$1 billion	4%	22%	82%

*excludes blank responses

47. What is your department's function?

Of total sample:	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
42% Human Resources/Personnel - General/Administration	53%	41%	29%
18% Relocation/Mobility Services	8%	13%	37%
17% Human Resources/Personnel - Compensation and Benefits	13%	19%	19%
12% Human Resources/Personnel - Talent Management	10%	17%	7%
5% Shared Services/Procurement/Purchasing	6%	7%	3%
4% Finance/Accounting	7%	2%	4%
2% Other	4%	2%	1%

Historic Trends

Traffic/Transportation Department	Percentage
1977	61.7%
1987	8%
1997	5%
2007	1%
2017	N/A

48. What area does your department report to (i.e. the next level up on the organizational chart)?

Of total sample:	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
55% Executive Management	70%	56%	34%
15% Human Resources/Personnel - General/Administration	9%	15%	22%
11% Human Resources/Personnel - Compensation and Benefits	7%	10%	18%
8% Human Resources/Personnel - Talent Management	4%	12%	7%
4% Relocation/Mobility Services	4%	4%	4%
4% Finance/Accounting	5%	2%	4%
2% Shared Services/Procurement/Purchasing	1%	1%	5%
2% Other	1%	1%	4%

49. What is your position within the company?

Of total sample:	Less than 500 Salaried Employees	500-4,999 Salaried Employees	5,000+ Salaried Employees
3% President	5%	2%	1%
13% Vice President	17%	12%	8%
28% Director	33%	30%	21%
31% Manager	26%	28%	40%
10% Relocation Administrator	4%	9%	19%
4% Supervisor	2%	7%	3%
4% Coordinator	5%	3%	4%
2% Recruiter	1%	3%	1%
2% HR Assistant	4%	2%	1%
3% Other	4%	4%	2%

THE 50TH ANNUAL ATLAS CORPORATE RELOCATION SURVEY

The Industry's Longest Running Survey

Every year since 1966, Atlas has collected input from corporate decision makers, analyzed it, and reported our findings. We illuminate the finer points of relocation to bring the bigger picture into focus.

You're invited to take part in next year's survey.

Your perspective can help the world better see how our industry works. To be included in the 51st Annual Atlas Survey, sign up at:

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