cartus

US and canada domestic mobility survey 2025

small-to-midsized relocation programs: trends summary

Our US and Canada Domestic Mobility Survey Report 2025 is a comprehensive exploration into the dynamic intersection of macroeconomic challenges, employee experience, and the ever-evolving landscape of domestic mobility strategies. With the final report out now, we've taken a deep dive into specific industries and program sizes—including small-to-midsized programs—to see what the data tells us.

Why it matters: Whether you're managing challenging relocations, attracting key talent, or future-proofing operations, these insights provide trends and opportunities for improving domestic talent mobility in small-to-midsized programs.

FOLLOWING ARE KEY FINDINGS FROM 60 RESPONDENTS WHO MOVE FEWER THAN 100 EMPLOYEES ANNUALLY:

mobility activity

In this year's report, 72% of participants from small-to-midsized programs reported that their mobility activity had either increased or remained stable—driven primarily by company growth, local talent shortages, and expansion into different markets.

The other side: In cases where mobility activity was reported as decreasing, cost containment strategies were listed as the top reason, followed by reducing volumes in different markets, hybrid solutions, and negative company growth.

move-types

Three move-types stand out as the most prevalent domestic offerings in small-to-midsized programs:

- **68%** renter
- **58%** lump sum
- **57%** standard homeowner with homesale program

The parent survey differed slightly across all program sizes: standard homeowners with home sale programs were the top move-type, followed by renters, and lump sums.

Other move-types are also prevalent in the small-to-midsized category, including executive tier policies (37%), standard homeowner direct reimbursement (35%), and domestic temporary assignments (33%).

in-house teams vs. program size

When asked how many in-house team members were responsible for the oversight of domestic mobility in their organizations, participants from small-to-midsized programs had this to say:

number of mobility-focused employees	percentage of participants
1	38%
2-3	40%
4-5	9%
5+	13%

relocation resistance

A key challenge is the resistance that can occur among employees when they're asked to relocate. A whopping 85% of companies with small-to-midsized programs cite family or personal circumstances as the top driver of employees declining an assignment, which mirrors data in the parent report (86%). Spouse/partner employment issues were listed at 62% and housing market challenges at 55%. Compensation and benefits issues came in fourth at 40%.

What it means: Interestingly, all four reasons listed for turning down an assignment in the small-to-midsized category point to a quality-of-life issue—for employees and their accompanying family members. Whether the employee is part of a dual-income household, their partner is concerned about their own career trajectory, or their home quality would suffer due to a move, an employee may not want to relocate if it risks their current standard of living.

Where small-to-midsized mobility programs stand: How are mobility teams trying to overcome employee resistance to relocation? One-third of respondents listed sign-on bonuses, followed by offering additional temporary living (30%) or home-finding days/assistance (22%). Another 30% reported doing nothing at all.

Room for improvement: While efforts are being made to address the housing market challenges listed by participants, when we consider the top reasons for employees rejecting a relocation (e.g., family or personal reasons and spouse/partner employment issues), it's clear that the key to reversing relocation resistance is to address these challenges directly. One of the most impactful ways to do that is to provide spouse/partner support. As noted in the parent report, only 21% of companies typically offer this benefit. This aligns with small-to-midsized programs, with very few offering this kind of support (20%).

Since spouse/partner support directly impacts the financial health of employees and the identity, career trajectory, and mental well-being of accompanying partners, more companies could improve their employee assignment acceptance rates by offering it as part of their assignment benefits package.

mobility priorities vs. challenges

Priorities and challenges for small-to-midsized programs closely mirrored those of the overall report.

domestic mobility PRIORITIES	
parent report, across all program sizes	**small-to-midsized programs**
1 improving the employee experience (50%)	1 improving the employee experience (52%)
2 improving in-house mobility processes and optimization (43%)	2 improving in-house mobility processes and optimization (47%)
3 achieving a more flexible approach to mobility (e.g., core/flex, tiered policy) (42%)	3 achieving a more flexible approach to mobility (e.g., core/flex, tiered policy) (43%)

domestic mobility CHALLENGES	
parent report, across all program sizes	**small-to-midsized programs**
1 rising mobility costs (51%)	1 rising mobility costs (50%)
2 meeting relocating employee expectations (33%)	2 meeting relocating employee expectations (32%)
3 achieving a more flexible approach to mobility (e.g., core/flex, tiered policy) (32%)	3 achieving a more flexible approach to mobility (e.g., core/flex, tiered policy) (30%)

Interestingly, 25% of participants also listed calculating mobility ROI and talent acquisition in slots four and five. Current in-house mobility processes and a lack of in-house resources were next on the list.

Zoom out: When we consider the above priorities and challenges within small-to-midsized programs, one thing is clear: while cost control continues to be a concern, organizations also understand the importance of providing a positive employee experience. Rather than simply 'cutting costs,' they're also prioritizing a mindful, more efficient approach to mobility to get there. Companies are looking for strategic ways to optimize their mobility programs, choosing efficiency-driven models that balance performance with care.

Cost saving measures: When asked what steps their companies were taking to achieve cost savings in their organizations, participants from the small-to-midsized category listed finding administrative process efficiencies (30%) and adopting a more flexible approach to policy benefits (28%). Capping mobility policies was also listed by 23% of participants as a cost savings measure.

lump sum and capped moves

For those with a small-to-midsized program, 38% have policies that include a total capped amount, with 57% of these same respondents determining the dollar amount by level or job type. Lump sum moves are offered by 58%, with 49% calculating payment amounts by employee level, 37% by family size, and 34% by distance.

Rewind: The use of lump sums in domestic mobility has grown since the 2017 Cartus Domestic US Relocation Policy & Practices Survey, which showed only 29% using lump-sum policies across all industries. That's 29 percentage points below what we're seeing today for companies with this program size! This change is likely to be driven in large part by the industry's technology advancements and the growth in employee choice approaches available over the last decade.

Reality check: While many organizations turn to lump sum mobility models to cut costs up front, the result is often surprising: mobile employees who don't know what they don't know often front-load spending, leaving insufficient funds for the end of the move. The administrative hours that in-house teams spend troubleshooting add up, costing businesses time and money in the long run. If your organization plans to use a lump sum model in its mobility program, consider providing managed lump sum support to avoid setbacks.

flexible mobility

The need for greater adaptability within mobility programs is evident, with 35% of respondents noting an increased requirement and 42% reporting that expectations have remained steady.

The drivers of flexibility, however, reinforce our earlier point about a desire to provide a positive employee experience: 91% of companies with small-to-midsized programs attributed changing employee expectations and needs as the main driver of increased flexibility—followed by improving employee experience at 67%.

Cost control and efficiency were also at the top of the list, with 48% citing a need to reduce policy exceptions and 43% each citing budget constraints/macroeconomic environment pressures and cost savings as driving factors.

core/flex mobility models

Flexible mobility models—including core/flex—are popular choices among businesses trying to build greater flexibility and cost savings into their mobility programs. Interestingly, only 28% of companies with small-to-midsized programs said they were considering adopting a more flexible approach to policy benefits, and 17% said they are considering incorporating a core/flex delivery model into their mobility program.

Of those considering it, there's a varied approach to who would select the flexible benefits. Specifically, a third reported that relocating employees themselves would make the selection, while 29% each indicated their HR business partner or the hiring manager would be responsible.

Another 29% of respondents said they are not considering a core/flex program.

The bottom line: Strategically designed core/flex delivery models enhance the employee experience, allow internal teams to better meet business goals and needs, and reduce exceptions. Regardless of who selects the flexible benefits, one size doesn't fit all. For a core/flex delivery model to be successful, internal teams must truly assess individual employee needs, rather than make assumptions, and address them when designing and implementing their mobility programs.

non-traditional benefits

When asked about non-traditional benefits that should be included as flexible offerings to attract relocating employees, respondents with small-to-midsized programs highlighted various options:

- Cash-out (35%)
- Cleaning services (23%)
- Gift cards (12%)

An additional 17% said they provide no non-traditional benefits.

talent acquisition and retention

To better meet the needs of both employees and the business, a handful of companies with small-to-midsize programs are investing in the following options to attract and retain talent:

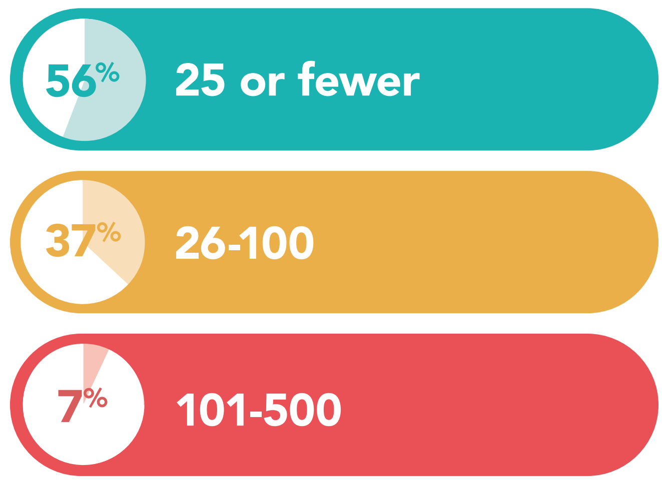
1. Adding benefits to attract key talent for relocation (5%)
2. Incorporating new inclusive policy elements to reflect changing employee needs (5%)
3. Employee-initiated moves (5%)

A key difference: While the first two options match the parent report, the percentages vary significantly, with 24% of all respondents adding benefits to attract key talent for relocation and 21% incorporating new, inclusive policy elements to reflect changing employee needs.

internship programs

The spotlight survey reveals that 45% of respondents with small-to-midsized programs support domestic internship programs, compared to the parent report's 62%. Within these internship programs, 89% support student summer interns, while 30% offer student intern rotations.

Annual intern program volume



Diverse and comprehensive benefits: Across industries, 88% of our parent report participants offer interns either a salary or lump sum payment. In the small-to-midsized program category, companies offered the following:

- Lump sum for the move (63%)
- Salary or hourly wages (30%)
- En route travel (26%)
- Coordinated housing (directly billed) (22%)

Resources provided to interns are intended to ensure a successful onboarding experience. The most popular resources that small-to-midsized programs provide include an onboarding company orientation (67%), performance objectives and coaching (30%), and destination orientation (11%).

Collaboration among interns is mostly encouraged through company intranet sites (33%), website resources (26%), and Yammer/Viva Engage communities (22%).

Reality check: Surprisingly, 30% of companies with small-to-midsized programs offer their interns no resources at all, which could be problematic among a population with limited to no prior work experience. In addition, providing no support to interns has been found to negatively impact the ability to recruit talent from lower socio-economic backgrounds and, therefore, might limit access to qualified candidates.

tracking intern conversions

There's room for improvement when it comes to tracking intern conversion rates: only 54% of respondents who offer internships are tracking advancement into permanent roles.

Why it matters: Given the connection between internship programs, cost-effective recruitment, and talent pipelines, enhancing tracking mechanisms for intern conversions will be crucial to organizational ROI and reaching long-term business objectives.

real estate market

When it comes to offering a home sale program, 62% of companies with small-to-midsized mobility programs do. The most effective measures being implemented to assist employees with their home sales include marketing assistance (70%), mandating network broker utilization (35%), and providing loss on sale protection (33%). A home sale incentive is also offered 30% of the time.

When asked what benefits their organizations had added or were considering adding to support destination housing purchases, survey participants from the small-to-midsized program category said home purchase assistance (35%) and duplicate housing (19%).

More than half (57%) said they're not considering adding benefits.

US buyer representation agreement

Of those managing moves within the United States, 20% indicated they understood the changes/potential impact of The National Association of Realtors (NAR) US Buyer Representations Agreement to their program very well, and 47% somewhat understood the legislation.

Still evolving: While 13% have made changes to their program in response to the settlement, 27% anticipate making changes in the next two years. Since many participants appear to be somewhat unclear on NAR legislation, it's not surprising that 47% remain unsure about whether they'll make any changes at all. Of those that will be making changes, 73% reported that they'll monitor program outcomes to determine long-term impacts.

hit play and get inspired:

Tune in to our Mobility Matters podcast episode, "Maximizing Internship Success: Strategies for Attracting, Retaining, and Relocating Top Talent" featuring insights from Doris Ng, Program Manager – Early Career, Medtronic.

technology

Like the parent survey, most participants with small-to-midsized programs (92%) stated they are not looking for a tech-only solution for specific move-types. However, when they are considering their relocation program administration, the following tools and technologies were listed as the most critical to their company:

- Data analytics
- Total cost reporting
- One source of truth for all mobility data
- Integration with all suppliers and Human Resources Information Systems (HRIS)
- Self-service cost estimator tool

artificial intelligence (AI)

Overall, while there is a growing interest in leveraging AI for relocation, many respondents indicated that their organizations are still in the early stages of exploring and implementing these technologies, if at all. Exactly 40% of respondents in this category stated they could foresee AI positively impacting their mobility program in the future, by using it for things like predictive analytics, cost estimation, general administrative tasks, and as a self-service tool for relocating employees.

DEI

While the acronym of "DEI" is becoming less prominent in some organizations today, inclusion, belonging, and the employee experience remain critical to most talent management strategies.

When asked where they stand in terms of aligning relocation with their organization's DEI priorities, 27% of participants with small-to-midsized programs shared that they are making progress.* Another 23% shared that they are just getting started, 13% said they are leaders in this space, and 25% said DEI was not part of their relocation focus at all.

Reality check: To improve the employee experience, companies need to understand employee needs, which are often influenced by individual circumstances and cultural expectations. Workforce engagement and productivity are also heavily impacted by whether employees feel seen, heard, and valued by their employers. To meet the top priorities and challenges listed in this report, decision makers would benefit from considering inclusion, belonging, and emerging needs as they align their mobility programs with their company's talent strategy and business objectives.

* "Making progress" in this context may include partner support, leveraging employee resource groups (ERGs), or providing cross-cultural and/or language training.

remote, hybrid, and extended business travel moves

What do we mean by Extended Business Travel (EBT), hybrid, or remote moves?

EBT: Business-initiated request for the employee to work from a different business location for a defined period (e.g., employee travels from Canada to the United States to work from their New York office for an extended time, typically 30 to 90 days)

Hybrid: Employees work partly at home and partly in the physical office (e.g., 1-2 days a week)

Remote work: Employee-initiated request to work from a location that is different from their permanent residence for a defined period (e.g., an employee based in California wants to work from Texas for two months during the summer)

Work from home: Everyone works at their place of residence

These types of moves are here to stay, but they remain a challenge for HR/mobility professionals.

When it comes to program responsibility, 78% of respondents said their corporate HR team manages the organization's domestic remote work policy, while 22% said the function was handled by their legal team.

Remote/Hybrid Workers

Nearly two-fifths (38%) of companies with small-to-midsized programs in the United States and Canada have remote workers, all offering medical coverage and work equipment. When asked how many remote/hybrid workers they anticipated having in their US and/or Canadian programs over the next year, respondents shared the following:

number of remote workers	respondents (%)
0-100	52%
101-500	30%
500-1000	9%
1000+	9%

More than 60% of respondents reported offering no remote-specific company-sponsored benefits to these employees, and 44% shared that their organization has parameters/guidelines on the distance employees can live.

Extended Business Travelers (EBTs)

When asked how many extended business travelers (EBTs) they expected to have, respondents shared:

number of remote workers	respondents (%)
0-100	78%
101-500	13%
1000+	9%

Of those actively tracking their EBTs movements, 18% rely on employee self-reporting. Use of an IP address or VPN data were also cited (9% each). Of those that aren't tracking, 17% said they're seeking a process for tracking today.

Reality check: The high number of organizations that don't track their EBTs (52%) is a concern. Knowing employee locations for compliance, security, and employee safety is crucial in today's ever-changing domestic mobility landscape.

sustainability

More than half (52%) of respondents with small-to-midsized programs said their organization had a corporate sustainability strategy covering the entirety of the business and its supply chain. In comparison, 30% weren't sure their organization had a plan. When assessing a partner's engagement and level of sustainability performance, 32% said it was desirable, and 25% said it was essential for the allocation of business.

Approaches to sustainable mobility choices varied:

- Made by the business and by individual employees (15%)
- Offered by the business—individual employees are given the autonomy to make sustainable choices (13%)
- Currently being developed, but are not yet fully implemented (12%)
- Made by the business only—determining the service options that employees can access (8%)
- Solely pursued via impact offsetting (e.g., carbon offsets, tree planting) (3%)

Reality check: Sustainability efforts accomplish a lot more than you think. Programs like "discard and donate" and organizations like Move For Hunger cut costs, lower emissions, and give back—all at the same time. With almost a third of small-to-midsized mobility programs not pursuing a specific sustainability strategy yet, this segment has room for improvement. Connecting the dots for smarter, more meaningful strategies benefits mobile employees, businesses, local communities, and the wider world.

listen to our *mobility matters* episode, green relo dreams – sustainability in motion

policy review

Exactly 40% of respondents are considering reviewing their domestic policies this year, driven by reasons including employee experience, cost, flexibility, and business oversight. Additional motivators include achieving program simplicity and reducing the number of exceptions.

Keep in mind: If you're reviewing your mobility policy with an eye on improvements, consider the challenges and priorities outlined earlier in this report: improving the employee experience, in-house mobility processes and optimization, and achieving a more flexible approach to mobility. By pursuing more mindful, efficient approaches to mobility processes, you can address rising mobility costs, meet relocating employee expectations, and achieve a more flexible approach to mobility.

ready for the road ahead

Domestic mobility across the United States and Canada is shifting rapidly—mirroring changes in the global talent market. Companies are feeling the push to elevate the employee experience, along with the pressures of rising costs. By developing innovative and strategic solutions and putting employees at the heart of corporate relocation programs, companies like yours will be better able to tackle both the opportunities and challenges that lie ahead.

For more advice and recommendations on your domestic or global mobility programs, email cartussolutions@cartus.com or visit cartus.com.

40% of respondents are considering reviewing their domestic policies this year

read our full report!

Drawing on experiences from 106 talent mobility respondents, the data in the Cartus US and Canada Domestic Mobility Survey 2025 represents construction, consumer services, extraction (oil, gas, and mining), finance, manufacturing, media, retail, tech, and transportation industries.

This report explores the intra-country programs and move volumes in the United States and Canada. Download your copy now to discover how organizations are responding to shifts in mobility volume and activity, navigating the housing market, managing remote work dynamics, and adopting flexible mobility practices. Plus, we explore the growing focus on DEI and sustainability in mobility functions.

Pressed for time? Read our Executive Summary here.

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