US and canada domestic mobility survey 2025

manufacturing: industry 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 have taken a deep dive into specific industries—including Manufacturing—to see what the data tells us.

Why it matters: Whether you're managing large-scale relocations, attracting skilled labor, or future-proofing operations, these insights give you a pulse on trends and opportunities for improvements to domestic talent mobility in the manufacturing sector.

FOLLOWING ARE KEY FINDINGS FROM OUR 29 MANUFACTURING RESPONDENTS:

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 in the manufacturing industry had this to say:

number of mobility-focused employees	percentage of participants
1	31%
2-3	38%
4-5	21%
5+	10%

76% of manufacturing companies reported that their mobility activity had either increased or remained stable

mobility activity

In this year's report, 76% of manufacturing companies reported that their mobility activity had either increased or remained stable—driven primarily by company growth, expansion into different markets, and local talent shortages.

Interestingly, the parent survey reflects similar reasons for increased mobility activity, with 71% of respondents indicating an overall increase or stability in their domestic mobility activity.

The other side: In cases where mobility activity was reported as decreasing—both in the manufacturing sector and in the parent survey—cost containment strategies, reducing volume in different markets, and hybrid solutions were cited as significant factors.

mobility volume

When examining move volume over a 12-month period, the manufacturing sector shows a distinct pattern: In the US, 67% of respondents reported managing less than 100 intra-country moves per year, while 22% managed between 100-500 moves. In Canada, 100% of the respondents with in-country programs managed less than 100 moves. These figures align closely with the parent survey results.

Putting it all together: In all cases, when looking at the size of in-house mobility teams compared with the number of employees they manage, it's apparent (but not surprising) that the more employees a business has, the more scalable their relocation program becomes. It's also important to note that the larger the volume, the more support and resources your mobility team may need to provide a positive employee experience during a relocation and meet organizational objectives.

move-types

Three move types stand out as the most prevalent in the manufacturing sector:

- **86%** renter
- **83%** standard homeowner with home sale program
- **62%** lump sum

Comparatively, the parent survey highlights these same move-types across all industries, with slight variations in their ranking: the standard homeowner with home sale program leads as the top move-type, followed by renter and lump sum programs.

mobility priorities vs. challenges

domestic mobility PRIORITIES	
parent report, across all industries	**manufacturing**
1 improving the employee experience (50%)	1 improving the employee experience (52%)
2 improving in-house mobility processes and optimization (43%)	2 reducing relocation costs/reviewing or redesigning mobility policy (41%)
3 achieving a more flexible approach to mobility (e.g., core/flex, tiered policy) (42%)	3 reviewing or redesigning mobility policy (42%)

Zoom out: While second and third priorities in the parent report and manufacturing report differ, they're all part of a common trend: organizations are focused on providing a positive employee experience, but they're also prioritizing a mindful approach to mobility to get there.

domestic mobility CHALLENGES	
parent report, across all industries	**manufacturing**
1 rising mobility costs (51%)	1 meeting relocating employee expectations (52%)
2 meeting relocating employee expectations (33%)	2 rising mobility costs (48%)
3 achieving a more flexible approach to mobility (e.g., core/flex, tiered policy) (32%)	3 talent acquisition (35%)

Zoom out: While the challenge of rising mobility costs is a driver for improving in-house mobility processes, the challenges of meeting employee expectations and talent acquisition are closely tied to the previously mentioned priorities of assessing policy design and building flexibility into mobility programs.

Putting it all together: The specific priorities and challenges highlighted reveal an important pattern: rather than simply "cutting costs," companies are looking for strategic ways to optimize their mobility programs, choosing efficiency-driven models that balance performance with care.

Proof in the numbers: When asked what steps their companies were taking to achieve cost savings in their organizations, participants from the manufacturing industry listed finding administrative process efficiencies (31%), transitioning to a core/flex delivery model (28%), and adopting a more flexible approach to policy benefits (21%). Interestingly, 24% said they weren't considering cost savings changes at all.

when it comes to turning down a relocation...
86% cite family or personal circumstances as the top reason

relocation resistance

A whopping 86% of companies in the manufacturing industry cite family or personal circumstances as the top driver of employees declining an assignment, which mirrors data in the **parent report** (86%). Housing market challenges were listed next at 69%, while 52% also cited spouse/partner employment issues.

What it means: Interestingly, all three reasons listed for turning down an assignment 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 support network would be lost due to a move, an employee may not want to relocate if it risks their current standard of living.

Reality check: When it comes to resistance to relocation, there's room for improvement. In the manufacturing industry, a sign-on bonus (41%) and providing additional time in temporary living accommodation (28%) were listed as the top two approaches. Only 14% of participants offer spouse/partner assistance—the approach that would most directly address many of the primary reasons employees reject a relocation. Of equal concern, 35% reported doing nothing at all.

lump sum and capped moves

In the manufacturing sector, 28% have policies that include a total capped amount, with 63% of these same respondents determining the dollar amount by level or job-type.

Lump sum moves are offered by 62%, with 56% typically calculating payment amounts by employee level and 50% calculating 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 33 percentage points below what we're seeing today in this sector! This may be due to an increase in technology support for lump sum moves in recent years.

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.

listen to our *mobility matters* episodes exploring flex mobility:

Flexibility in mobility: necessity vs. possibility
with Silvia Gong of General Motors

The future of mobility is here, and it's flexible
with Amy Spiker of Eaton

flexible mobility

The need for greater adaptability within mobility programs is evident, with 45% of respondents noting an increased requirement and 41% reporting that expectations have remained steady.

The real story, however, unfolds in the details, especially when we look at the manufacturing sector versus the main survey. In manufacturing, every respondent attributed increased flexibility demands to shifting employee expectations and needs—24 percentage points higher than the overall survey.

Additionally, 77% of respondents in manufacturing said that improving employee experience is a key reason for making their mobility programs more flexible—just a tick behind the parent survey's 76%.

Flexibility isn't only about happier employees but also about smart budgeting and efficiency. When looking at the parent survey, the focus on cost savings by a broader spectrum of industries rose to 50%, much higher than the 31% among manufacturers.

Additional drivers in the manufacturing industry included:

- Reducing policy exceptions (62%)
- Talent attraction (39%)
- Administrative ease (31%)

core/flex mobility models

Core/flex mobility models are a popular choice among businesses that are trying to build greater flexibility—and cost savings—into their mobility programs. To that end, 28% of manufacturing respondents said they were considering incorporating a core/flex delivery model into their mobility program. Of those considering it, however, there's a notable division regarding who would select the flexible benefits. Specifically, 39% reported that either their company's HR business partners or the relocating employee themselves would make the selection, while another 31% indicated the hiring manager would be responsible. Surprisingly, 39% stated they're not considering adopting a core/flex program at all.

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 need to 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, manufacturing respondents highlighted various options that ranked similarly across industries:

- Cash-out (24%)
- Cleaning services (21%)
- Gift cards (14%)

Another 28% said they do not offer any non-traditional benefits.

talent acquisition and retention

To better meet the needs of both employees and the business, companies are investing in these top three options to attract and retain talent:

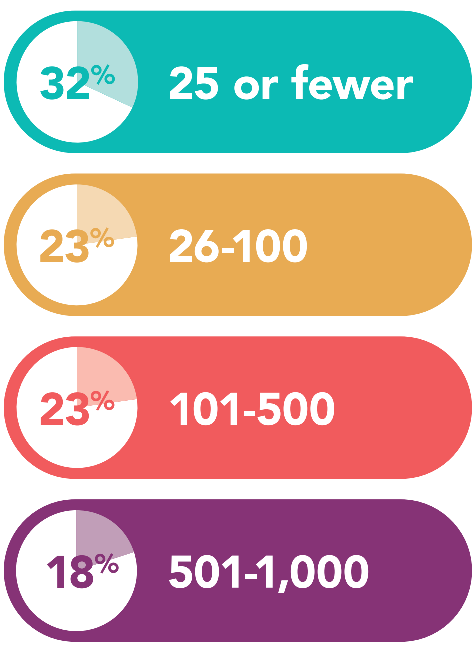
1. Adding benefits to attract key talent for relocation
2. Amplifying relocation support for intern programs
3. Incorporating new inclusive policy elements to better reflect changing employee needs

internship programs

Internship programs play a vital role in fostering new talent within the manufacturing industry. The manufacturing spotlight survey reveals that 76% of manufacturing respondents support domestic internship programs, slightly higher than the 62% found across all industries in the parent survey.

Within these internship programs, 86% of manufacturers support student summer interns, while 32% facilitate student intern rotations. This demonstrates a strong commitment to training and developing future professionals in the field.

Annual intern program volume



Manufacturing companies are notably more likely to manage large intern programs, with 18% hosting between 501 and 1,000 interns annually. This is more than double the proportion seen in the parent survey, where only 7% of respondents report intern volumes at this scale.

Diverse and comprehensive benefits: Across industries, participants in our parent survey reported that 88% offer interns either a salary or lump sum payment. In the manufacturing sector:

- 50% provide a salary or hourly wage
- 36% offer a lump sum for moving expenses
- 32% cover enroute travel costs
- 27% give a monthly stipend

Resources provided to interns are intended to ensure a successful onboarding experience. The two most popular resources that manufacturing companies provide include a company orientation (64%) and performance objectives and coaching (46%). Collaboration among interns is mostly encouraged through company intranet sites (41%) and other online resources (18%).

Reality check: Surprisingly, 27% of companies 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

When it comes to tracking intern conversion rates, there's notable room for improvement in the manufacturing industry. While 60% of companies currently track this data, this is seven percentage points lower than the 67% found in our parent survey.

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.

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.

real estate market

Home sale programs are widely available in manufacturing, with 90% of survey participants offering them. The most effective measures being implemented to assist employees with their home sales include marketing assistance (81%), followed by a home sale incentive (46%), and mandating network broker utilization (42%).

When asked what benefits their organizations had added or were considering adding to support destination housing purchase, survey participants from the manufacturing industry had this to share:

- Not considering adding benefits (42%)
- Home purchase assistance (39%)
- Duplicate housing (19%)

US buyer representation agreement

Of those managing moves within the United States, 44% indicated they understood the changes/potential impact of The National Association of Realtors (NAR) US Buyer Representation Agreement to their program "very well," and 41% "somewhat" understood the legislation.

Still evolving: While 15% have made changes to their program in response to the settlement, 30% anticipate making changes in the next two years. Since many participants appear to be somewhat unclear on NAR legislation, it's not surprising that 44% remain unsure about whether they'll make any changes at all. Of those that will be making changes, 85% reported that they'll monitor program outcomes to determine long-term impacts—more than the 77% reported across all industries.

technology

Just as in the parent survey, the majority of manufacturing participants (97%) 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 technology 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)
- Accessibility (e.g., screen reader support)

These results were also consistent with the top priorities listed in the parent report.

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. Ten of the 29 manufacturing respondents indicated they were looking to use AI for policy consultations, cost estimation, and predictive analytics. Another seven were either unsure or not considering near-term changes.

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 do you stand in terms of aligning relocation with your organization's DEI priorities?", manufacturing participants had a wide range of answers. Encouragingly, 31% of participants said they are making progress* and another 14% said they were just getting started. However, 31% 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. For many companies, there is a disconnect: to meet these goals, which were consistently listed as top priorities and challenges, decision makers would benefit from considering DEI as they align their mobility programs with 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.

Remote workers: Almost 40% of manufacturing companies in the United States and Canada have remote workers, yet 73% of those respondents don't offer company-sponsored benefits. Of those that do, all of them typically offer medical coverage and work equipment.

When it comes to program responsibility, 82% of respondents said their HR department manages the organization's domestic remote work policy. Company legal and relocation departments were next in line, at 18% each.

almost 40% of manufacturing companies in the united states and canada have remote workers

extended business travelers (EBTs)

Most manufacturing respondents (64%) expect to manage under 100 EBTs this year, while 18% expect to manage 101-500. Of those that are actively tracking their EBTs' movements, 50% are using an IP address to do so. Interestingly, 64% of respondents don't track the movement of their EBTs at all, with 91% reporting that they're also not seeking a tracking solution.

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

sustainability

It's encouraging to report that 59% of manufacturing respondents said their organization had a strategy for corporate sustainability that covers the entirety of the business and its supply chain. When assessing a partner's engagement and level of sustainability performance, 41% said it was "desirable" while 31% said it was "essential" for the allocation of business.

Approaches to sustainability varied when specific to mobility programs: 24% shared that—while sustainable options were offered by the business—individual employees are given the autonomy to make sustainable choices. Smaller numbers shared that:

- Mobility choices were made by both the business and mobile employee (7%)
- Sustainability measures are solely pursued via impact offsetting, like carbon offsets and tree planting (7%)
- The business makes all choices regarding the determination of sustainable service options that would be available to employees (3%)

Another 41% of respondents said sustainable mobility choices were not being developed at all.

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 half of manufacturing businesses not pursuing a specific sustainability strategy yet, there's room for improvement in this sector. 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

Just over half of manufacturing respondents (52%) are considering a review of their domestic policies this year—not surprising, since almost half of respondents (48%) indicated that they review their policies every one to two years.

Keep in mind: If you're reviewing your mobility policy with an eye on improvements, consider the priorities outlined earlier in this report: improving the employee experience (52%), reducing relocation costs (41%), and a more flexible approach to mobility (38%). Organizations across all industries can address rising costs, meet employee expectations, and achieve their organizational goals by pursuing more mindful, efficient approaches to mobility processes.

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, while managing 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.

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.