

55th Annual



# ATLAS<sup>®</sup> CORPORATE RELOCATION SURVEY



## SURVEY HIGHLIGHTS BY SECTION



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## SURVEY HIGHLIGHTS

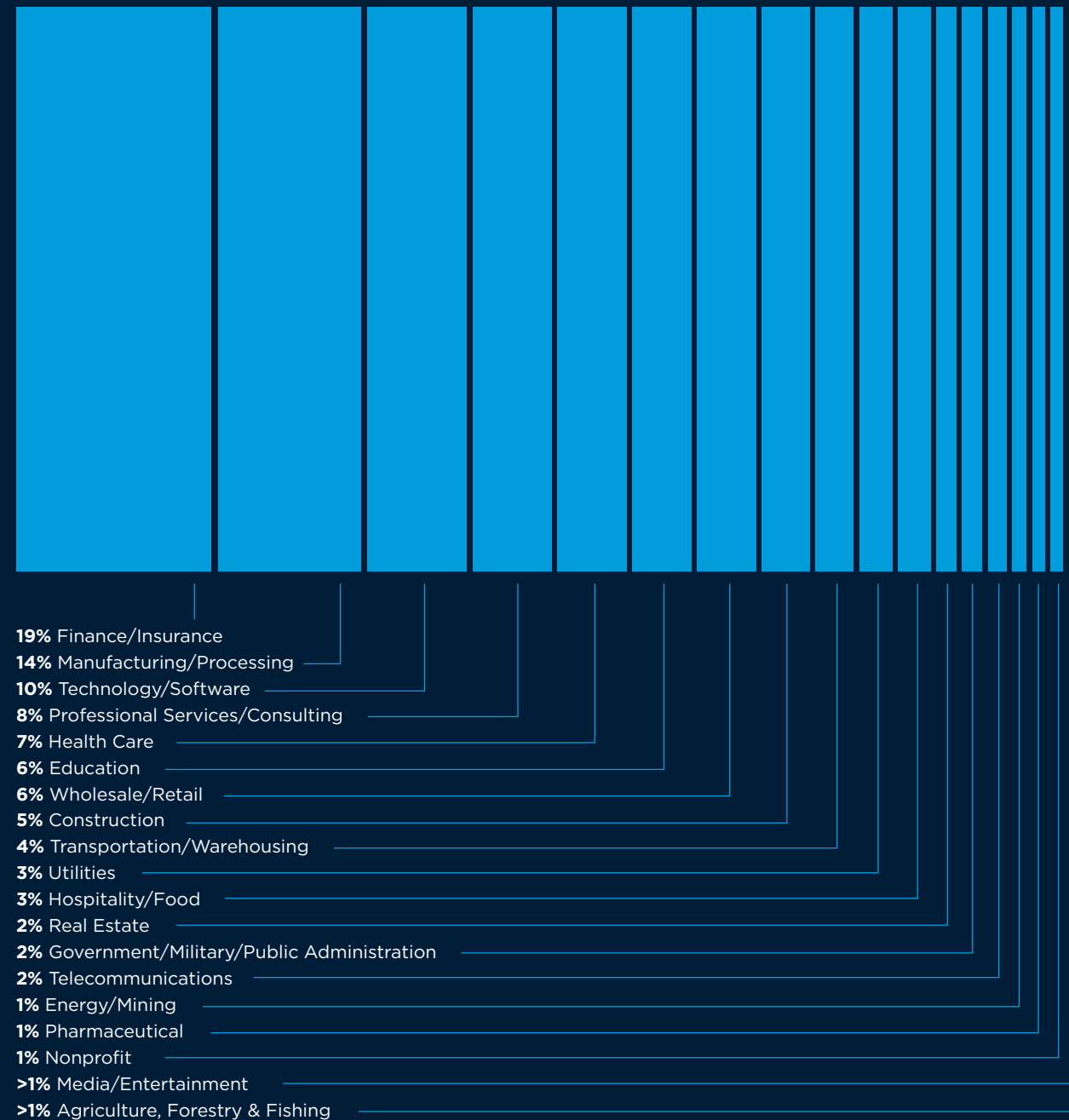
Atlas® is pleased to bring you our 55th Annual Corporate Relocation Survey, the industry's first and longest-running investigation into corporate relocation policies and practices.

### ATLAS® IS IN IT FOR THE LONG HAUL

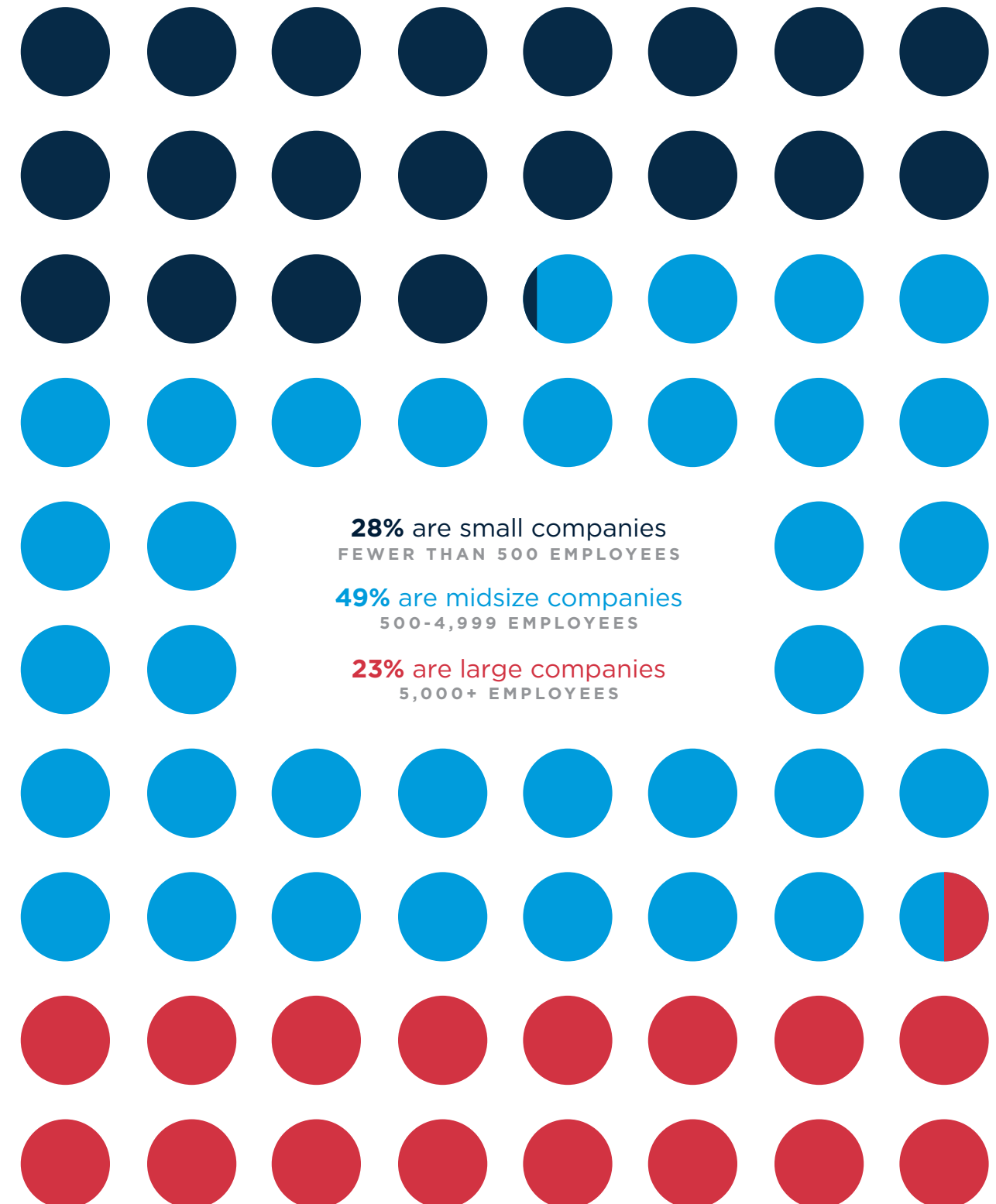
As we've done every year since 1968, we consider the demographic, geopolitical, and economic shifts affecting our industry and analyze the findings to uncover trends to help us clearly understand the evolving challenges—and learn how we, as relocation professionals, can solve them.

## WHO RESPONDED?

Invited via email, **533 decision-makers completed the online questionnaire** between Feb. 7 and Feb. 24, 2022. Each respondent has a 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.



## SIZE OF COMPANIES WE SURVEYED



# OVERVIEW + INSIGHTS

## WHAT IS HAPPENING:

**COVID-19:** COVID-19 remains the main external impact affecting corporate relocation. Companies appear hesitant to make drastic changes to policy until the “end” of the pandemic. Relocation volumes and budgets are on the rise, but so are pandemic-related logistical complexities.

**FACTORS IMPACTING RELOCATION:** The current workforce faces many tough considerations concerning relocation. For employees, COVID-19 has dropped in importance, falling behind concerns around family issues, spouse or partner employment, and cost of living. Employees are making their career decisions in a shifting economic landscape, where inflation and housing prices are major influences.

Family structure, finances, and responsibilities are also main considerations.

In 2021-2022, much of the workforce is comprised of the Gen X and Millennial generations who are dual caretakers for their own children as well as aging parents. Considerations around childcare, eldercare, and reliance on dual income are likely to be on these employees’ minds as they seek jobs.

**GLOBAL TRENDS:** In addition to economic concerns, global conflict may have a significant impact on relocation in 2022 and beyond. So far in 2022, the Russia-Ukraine conflict is causing deep economic ripples internationally. As sanctions tighten and conflict continues, international relocations will likely be impacted by employees’ ability and willingness to relocate—this is especially true as most internationally relocating employees cited safety concerns around conflict as a main reason to decline relocation in 2021.

**ASSISTANCE:** Despite many companies offering some form of spousal assistance, HR professionals report that only 1 in 5 employees accept the assistance offered. It may be the case that the assistance is insufficient.

**RELOCATION REIMBURSEMENT:** Given difficulties with housing, lump-sum benefits may have a reduced effectiveness for both employers and employees. Employees may lose work productivity due to a need to spend time and energy securing housing.

**WORKPLACE MANAGEMENT:** Workers seek flexibility and customization in their relocation and workplace experience.

## WHAT COMPANIES CAN DO:

- Even as some pandemic impacts subside with the expansive availability of COVID-19 testing and vaccines, and a continued focus by employers on workplace hygiene and PPE access, be aware of global trends that might affect relocation. 2022 may bring other major events—like global conflict—that could impact company performance and relocation success.
- Consider layering additional assistance or customization into relocation reimbursement. Assigning tier-based reimbursement can overlook individual circumstances of employees, that once addressed, may help relocations succeed. Companies need to consider offering a combination of benefit types.
- Companies should examine the needs of their relocating employees as they pertain to cost of living, housing, child care, and/or elder care, and address gaps in policy as needed. Considerations include:
  - » Increase house-hunting opportunities/assistance for homeowners and renters.
  - » Increase temporary-housing assistance.
  - » Increase or update spousal assistance programs.
  - » Grow practical family support assistance, including increased paid leave to care for elderly parents.
  - » Review hybrid/remote work policies for relocating employees. Hybrid/remote work allows employees to reside outside dense metropolitan areas, increasing the chances of finding a home faster and saving on living costs.
  - » Consider policies for voluntary remote worker relocation. The rise in telecommuting has increased wanderlust and the desire for remote or nomadic residency for some employees.
  - » Employees have limited time and want fast, useful, and condensed information. The development of applications and online tools that keep information and resources all in one place improves employees’ experiences. By providing real-time online resources that support the moving process, such as updates on travel restrictions, quarantine periods, international/domestic guidelines, a list of suppliers/vendors, relocation counseling, etc., companies create lasting relationships of trust, which they continually retain after the relocation.
  - » It is essential to have a resilience program in place with real-time questions and updates from the global crisis and events that may affect relocation. Also, have a plan to advise employees impacted by international/domestic relocation and backup services to support them in the process.





# RELOCATION VOLUME + BUDGETS

The global pandemic stagnated the relocation industry in 2020. From 2020-2021, **1 out of 3 companies said that relocation volume decreased** compared with historic norms.

However, 2021-2022 trends paint a more optimistic picture of industries recovering from the pandemic standstill that occurred in 2020. In 2021, our findings across this survey indicate the impact of COVID-19 is lessening for the relocation industry. As less-severe variants signal an ease of pandemic-era restrictions globally, employees and employers are empowered by vaccines and safety precautions to remain productive as well as safe.

When asked to compare 2021 to 2020, companies reported the following changes:

**60%**

reported an **increase** in employees relocated overall.

**48%**

reported an **increase** in international relocations.

**57%**

reported an **increase** in relocation budgets.

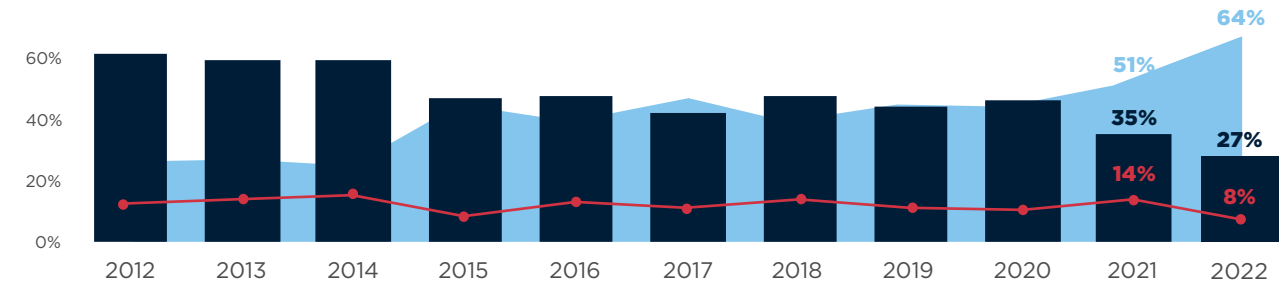
**52%**

reported that overall financial performance **increased** in 2021.

## Overall Relocation Volume: 2012-2022

Compared with 2021, do you anticipate that the number of employees your company will relocate during 2022 will...

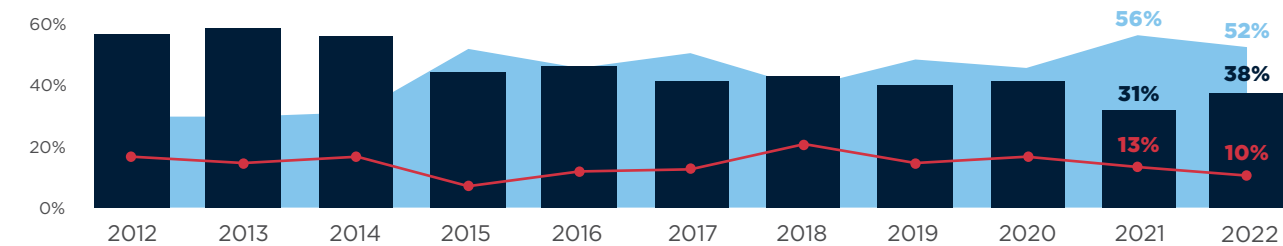
● Decrease ● Stay the Same ● Increase



## International Relocation Volume: 2012-2022

Compared with 2021, do you anticipate that the number of employees your company will relocate internationally during 2022 will...

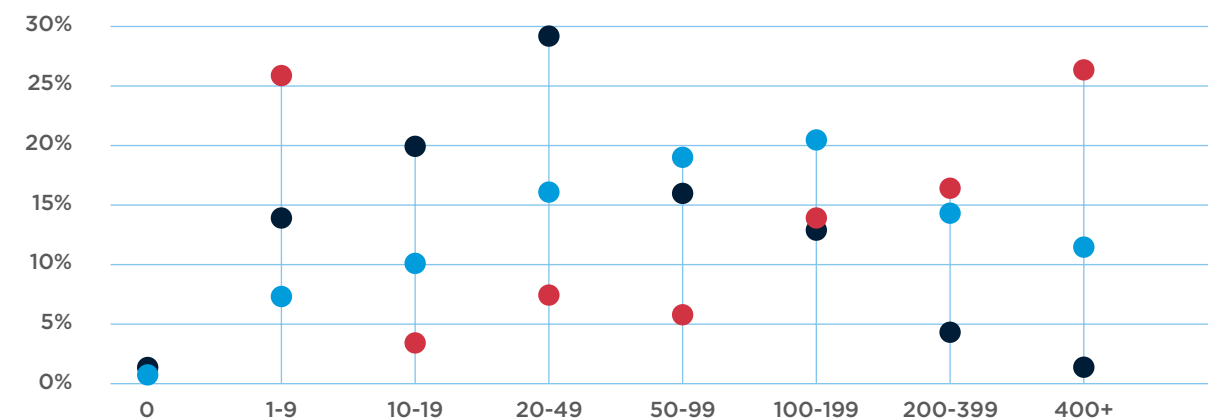
● Decrease ● Stay the Same ● Increase



## Total Amount of Moves

How many employees did your company relocate in 2021?  
(total amount of moves overall—including international relocations)

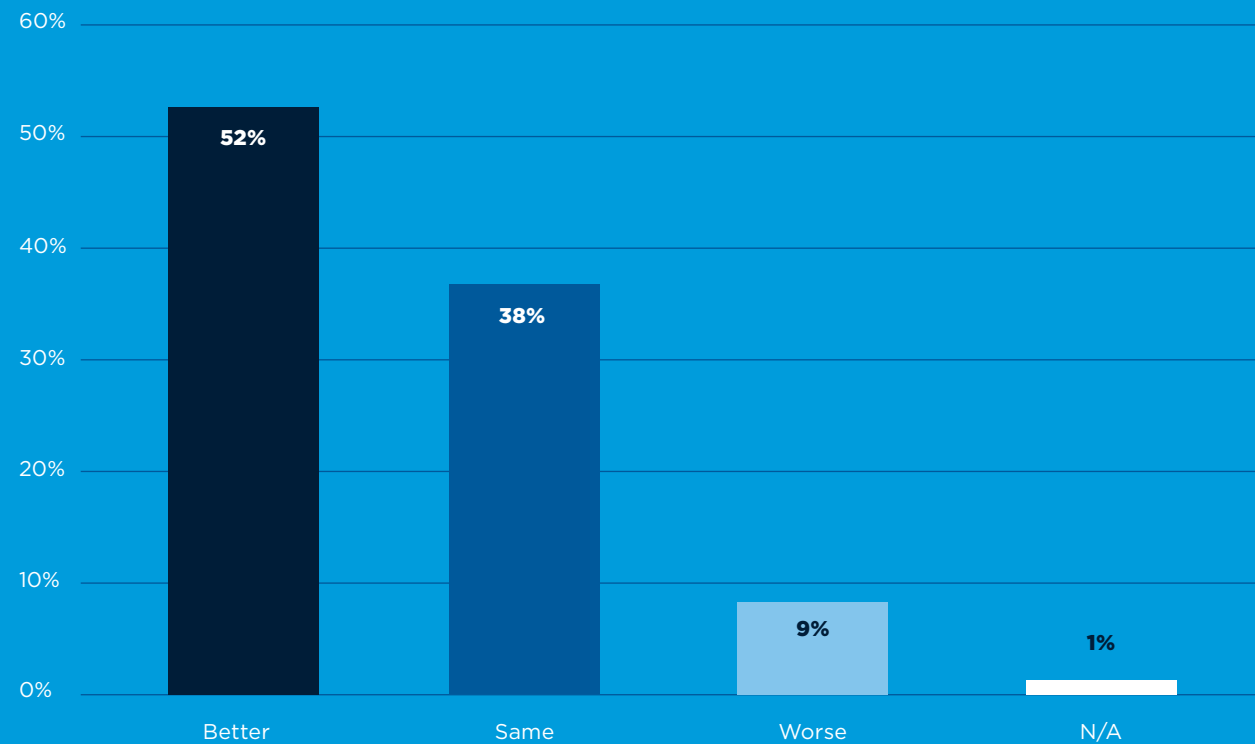
● Small Companies ● Midsize Companies ● Large Companies



In addition to increasing relocation volumes and budgets, companies overall reported increased financial performance in 2021 compared to 2020. However, it's important to note that the landscape isn't necessarily getting "back to normal." As relocation volume and budgets trend upwards, companies also report that the logistical and cost complexities associated with COVID-19 will continue to increase. It's most likely that the coronavirus will prompt ongoing and frequent changes to relocation policies.

The current global landscape can quickly change—not only because of the coronavirus, but also worldwide economic, political, and sociocultural trends.

Financial Performance of 2021 Compared With 2020



**46%** of companies made changes to their relocation policies in 2021.

**54%** of companies anticipate the need to make changes to their relocation policies in 2022.

More than **1 in 3 companies** reported that the trending complexity of relocation stayed static in 2021 compared with 2020, but nearly **1 in 2 companies** anticipate increasing complexity in 2022.



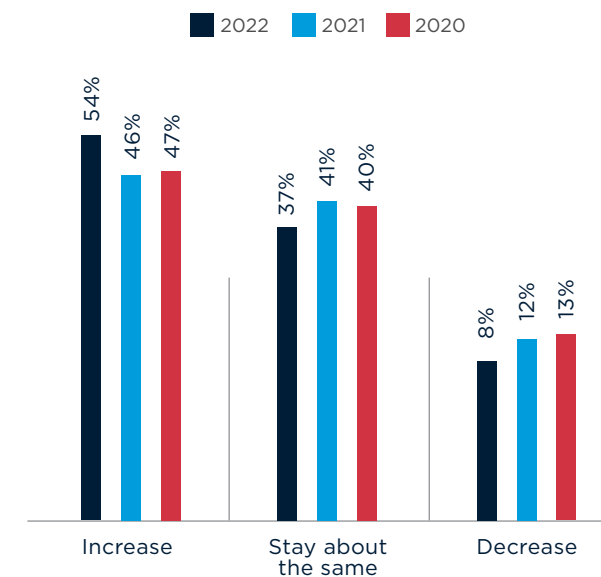
Cost was the most distinct anticipated increase, with **59%** expecting 2022 to bring higher costs.

**54%**

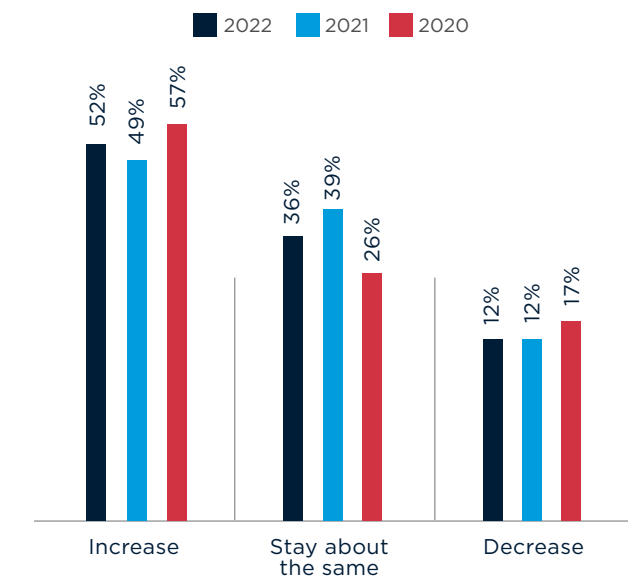
anticipate a **higher number of relocations** overall to take place in 2022.

COVID-19 and inflation spiked ocean freight, air freight, housing, transportation, and food costs worldwide. These conditions may increase costs in every step of the mobility process, such as temporary housing/housing expenses and storage.

Relocation Policy Changes

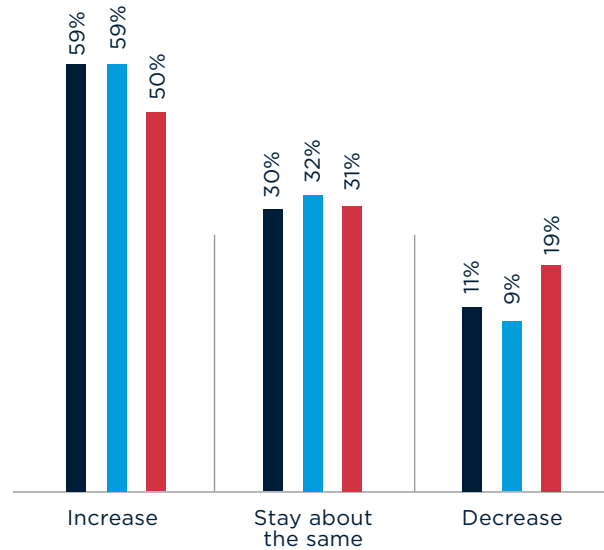


Complexity of Relocation



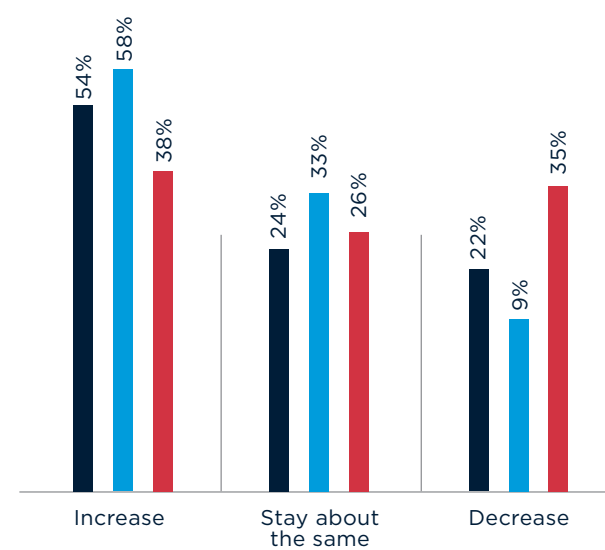
Relocation Costs

■ 2022 ■ 2021 ■ 2020



Number of Relocations Performed

■ 2022 ■ 2021 ■ 2020



RECOMMENDATIONS

WHAT IS HAPPENING:

- Overall relocation volume and budgets are increasing out of their pandemic standstill and are normalizing the growth trend seen over pre-pandemic years. Overall increased financial performance in 2021 was reported by 1 in 2 companies.
- However, more than half of all companies anticipate increasing costs and complexities for relocations moving into 2022. This is reflected in later findings in this research study that pertain to challenges both employees and employers face both due to direct consequences of COVID-19 and its broader economic trends.
- There remains diversity among reimbursement types offered by companies, with full reimbursement being the most common, followed by lump sums.

WHAT COMPANIES CAN DO:

- Be aware of global trends that may impact relocations, even as the pandemic's impact subsides with workplace management focused on hygiene, the availability of COVID-19 vaccines, and expansive access to testing and PPE. 2022 may bring other major events such as global conflict that will impact company performance and relocation success.

# FACTORS IMPACTING RELOCATION

## EXTERNAL FACTORS

COVID-19 maintains its influence on relocation, but other trends emerge.

**56% of all companies** reported that COVID-19 remained the most significant external factor impacting employee relocation in 2021. This is a year-over-year decrease from 2020, in which **62% of companies** felt COVID-19 was the most influential factor on relocations.

### Top 5 External Factors on Relocation in 2021



**41%** of companies cited economic conditions as the most impactful external factor on relocation.

**27%** cited the housing market as impacting relocations.

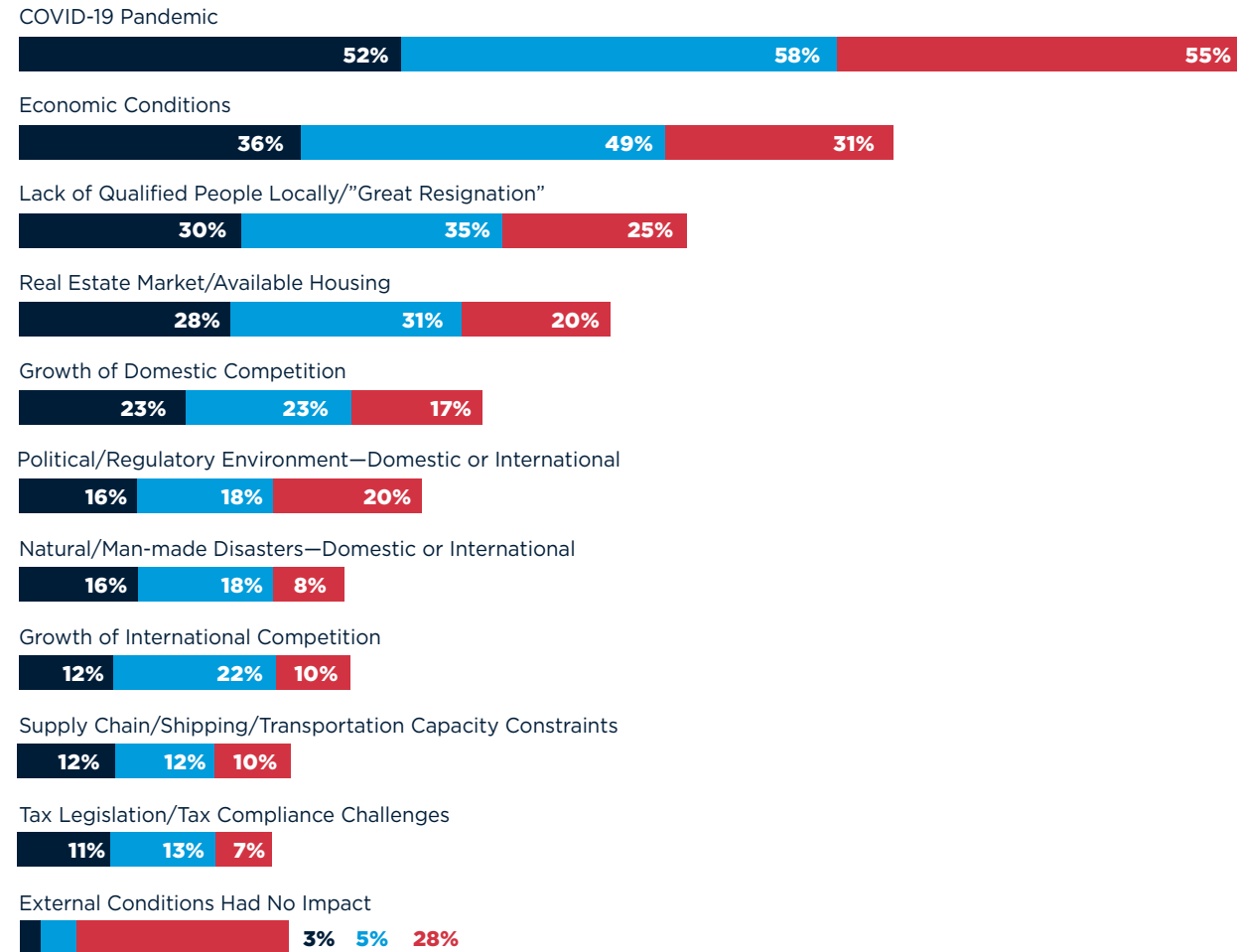


Nearly 1 in 3 companies cited the "Great Resignation"/Lack of Qualified People Locally as an impact on relocations.

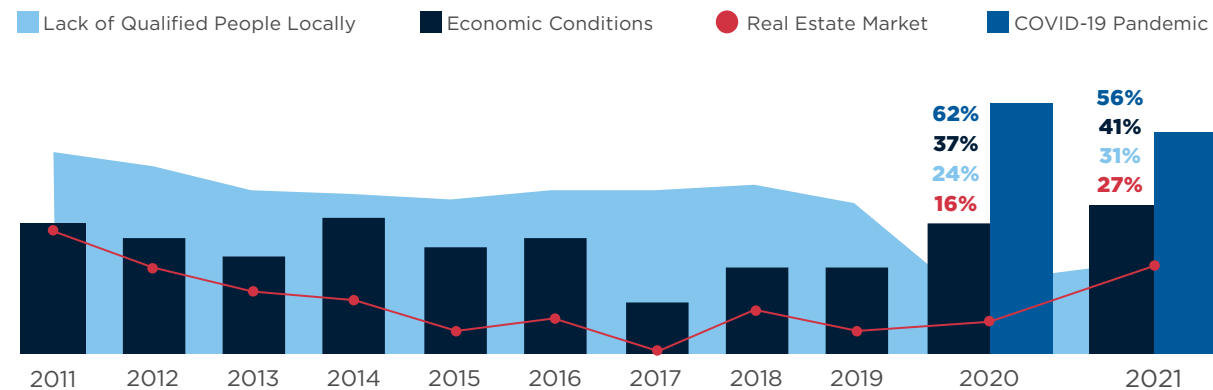
### External Factors on Relocation Volume

What external factors had the most significant impact on the number of your employee relocations in 2021?

● Small Companies ● Midsize Companies ● Large Companies



### Select External Factors on Relocation Volume: 2011-2021



Even as companies anticipate increases in overall financial health for the current year, they should remain aware of global trends that may pose challenges for 2022 and beyond:

#### GLOBAL CONFLICT

As of the writing of this report, the Russia-Ukraine conflict is escalating. As sanctions are implemented, there will be economic consequences globally that may require more robust cost-of-living adjustments in certain locales.

Currently, global conflict is a main concern of employees relocating internationally. However, only 15% of all companies are concerned about natural or man-made disasters, including war or civil unrest. This impact may increase throughout 2022.

#### INFLATION

As of the writing of this report, the rate of inflation has seen a historic 12-month increase in the United States (U.S. Bureau of Labor Statistics). As prices increase domestically and internationally, employees will be pressured to make more decisions based on economic well-being. Employers may benefit from revisiting reimbursement policies, as well as cost-of-living concerns.

#### REAL ESTATE

With rising prices in the housing market and an extremely competitive market for buyers, companies may benefit from creating more robust house-hunting assistance.

#### INTERNATIONAL

Global efforts to contain the COVID-19 virus have led many countries to impose additional restrictions on potential immigrations/transferees. Health assessments, visa applications, proof of vaccination, and quarantine upon arrival have been common requirements worldwide. Immigration policies have caused disruption of services, increasing the complexity of relocation for many companies.

Travel restrictions remain one of the biggest challenges for employers and employees during the pandemic. International travel has become increasingly complex with policy changes, shutdowns, new variants, and supply chain congestion. Supply chain congestion and global shutdowns have caused an increase in prices and delays during 2021. There are currently 174 countries open with restrictions, causing delays and closures.

## THE GREAT RESIGNATION

One lasting impact of the coronavirus has been a large-scale cultural shift in the types of jobs employees are looking for. 2021 saw employees quitting jobs in search of something better.

The extent of job loss since 2020 hasn't been seen since World War II. **Past recessions have slowed down employment mainly from the demand side; however, COVID-19 has also held up the labor supply.**

According to the U.S. Bureau of Labor Statistics, the pandemic substantially impacted employment, with approximately 33 million Americans quitting their jobs since the pandemic started. The Great Resignation decelerated the job market and company growth (29%), the main internal factor impacting relocation volume in 2022. **Every organization will need a plan encompassing policy, physical space, and technology**

**that addresses cultural shifts in employees' attitudes around workplace management.**

**Microsoft's 2021 Work Trend Index found that 41% of employees are considered leaving their current employer last year, and 46% said they're likely to move because they can now work remotely.**

In 2021, Lack of Qualified Candidates Locally/the Great Resignation was the third-most-impactful external influence on relocation, with nearly 1 in 3 companies citing it as an impact. This was most drastic for small and medium companies, of which 30% and 35% reported effects from unqualified personnel or the Great Resignation respectively, with large companies trending more toward the average 25% of companies reporting.

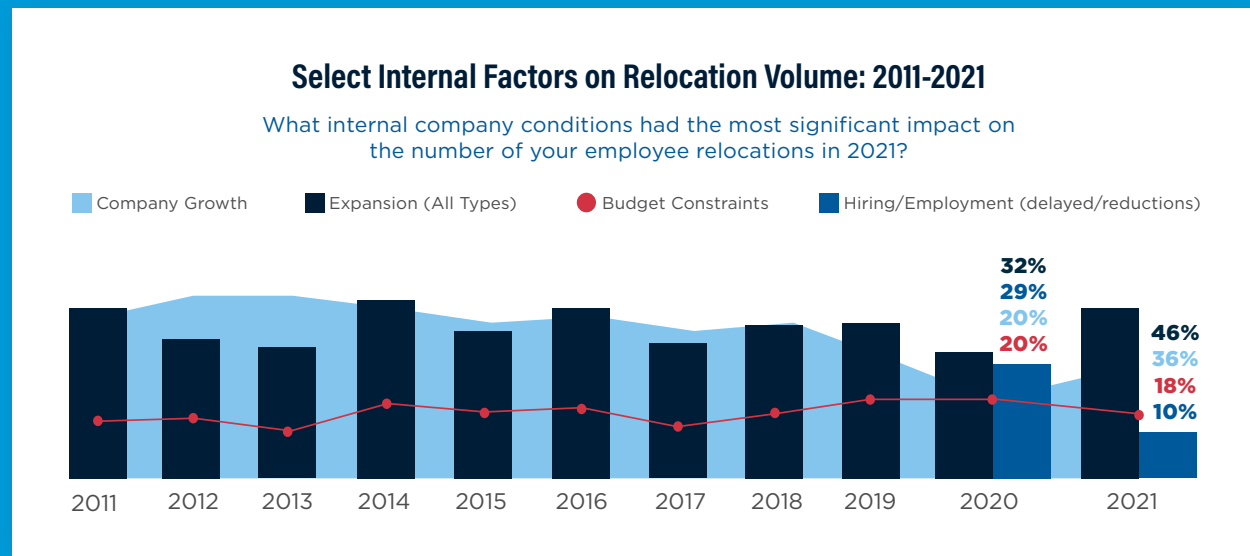
CITATIONS: U.S. Bureau of Labor Statistics, 2021 | Microsoft®, 2021



## INTERNAL FACTORS

In 2021, nearly 1 in 3 companies experienced company growth that necessitated employee relocations alongside fewer budget constraints and fewer delays in hiring—a significant recovery from generalized growth stagnation in 2020.

From 2020 to 2021, Expansion (All Types) was the most steeply increasing internal factor impacting relocation. Across companies, this comprised of expansion of facilities, geographic footprint, and virtual/remote working capabilities. In 2021, delayed or reduced hiring saw a decrease in impact, further indicating recovery from the pandemic. However, budget restraints saw the least amount of change, with only a 2% decrease in impact from 2020 to 2021.



Industry trends in 2021 demonstrate that some companies have found their footing during—and possibly because of—the coronavirus pandemic.

While generalized growth of the company was cited as the most common internal influence across all companies, some industries do stand out as particularly successful:

- **Energy/Mining:** 62% of companies reported Growth as being the most significant influence.
- **Wholesale/Retail:** 48% of companies reported Growth as being the most significant influence.
- **Finance/Insurance:** 44% of companies reported Growth as being the most significant influence.
- **Technology/Software:** 44% of companies reported Growth as being the most significant influence.

These industries demonstrate fields that could quickly pivot/adapt to COVID-19 restrictions, including remote work, as well as COVID-19 opportunities, such as an explosion of shoppers utilizing digital/online shopping to carry out basic tasks like buying groceries or other amenities without needing to visit physical stores. In the early days of the pandemic, shopper downloads of digital shopping apps increased significantly, while visits to digital storefronts increased from 16bn to 21bn (Statista, 2022).

Meanwhile, Real Estate (63%) stands out as a leader in Increased Production, cited as an internal influence. For real estate, the pandemic created several notable trends. According to the U.S. Census Bureau and Zillow, the rise of remote work allowed both renters and homebuyers to relocate to areas with a lower cost of living, while home values climbed steeply.

When it comes to industries hardest hit with difficulties during 2021:



**Health Care** was the most likely to see decreased relocations as a result of Budget Constraints, with 30% of companies reporting this as a challenge.



**Hospitality (23%)** and **Telecommunications (20%)** were the most likely to report Staff Reductions/Furloughs/Layoffs.



**Pharmaceutical (28%)** and **Government/Military/Public Administration (27%)** were the most likely to report Employee Ineligibility/Inability to Relocate as an internal influence on relocation.

Moving into 2022 and beyond, industries hardest hit by challenges will need to look for opportunities in the most successful relocation and operational policies.

### WHAT IS HAPPENING:

- International travel is impacted by the coronavirus pandemic, with travel and immigration policies affected by COVID-19 restrictions.
- COVID-19 has continued to disrupt the supply chain, with consequences for storage, shipping, and relocation logistics.
- Global conflict may pose an increasingly challenging external factor on relocations, with economic and political impacts.
- Inflation likely raises real cost-of-living concerns for potential employees considering relocation. Likewise, the current real estate market may pose a challenge to relocating employees.
- The Great Resignation will change the shape of employee competition and eligibility.

### WHAT COMPANIES CAN DO:

- Examine hybrid/remote work policies to ensure competitive placement offerings for relocating employees.
- Examine housing assistance policies, as well as requirements around relocations with regards to a specific location, as some employees may prefer a longer commute and a lower cost of living rather than living closer to on-site work locations.
- Implement communication policies that enable all employees to access real-time updates and information about global events that may impact relocation, including conflict or other major events. Have a plan to advise employees on necessary steps to take when major global events occur.

RECOMMENDATIONS

# COVID-19

## COVID-19'S IMPACT ON EMPLOYERS

In 2021, companies were able to start forming a clearer picture of which changes would be permanent in a post-pandemic world, and what changes would still have to be enacted in response to the pandemic. While the overall negative impact of the pandemic as a source for failed relocations is decreasing, COVID-19 has produced several labor and employment trends that are likely here to stay, especially as they pertain to workplace management. Vaccine availability, mandates, and policy changes have brought confidence to employers to take action to protect employees who are returning to the workplace, while some companies and many employees desire hybrid/remote workplaces when possible.

COVID-19 remained the top external factor impacting employee relocations, but its overall impact decreased somewhat from impacting 62% of the total audience in 2020 to 56% in 2021. As health authorities begin to signal that the end of the pandemic may be in sight, it's likely that the overall impact of COVID-19 will continue to decrease. Despite enduring difficulties owed to the pandemic in 2021, companies do anticipate decreased complexity and increased relocations for 2022.

However, in the immediate future, employers can continue to expect increased complexities with relocation.

1 in 4 companies said the number of relocations performed increased significantly, with over 1 in 2 companies reporting an increase in relocations.



Relocation policies changed and costs increased for over half of all companies.

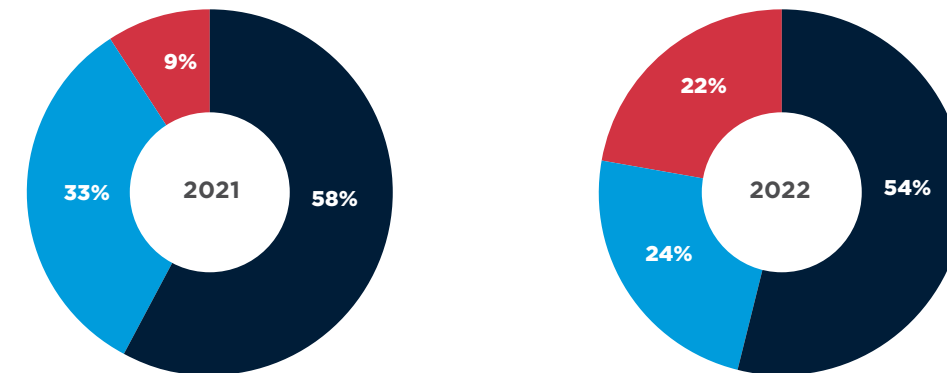
# 1/2

of companies reported increasing complexity in relocation administration in 2021. Roughly the same number of companies also experienced difficulty in relocating employees.

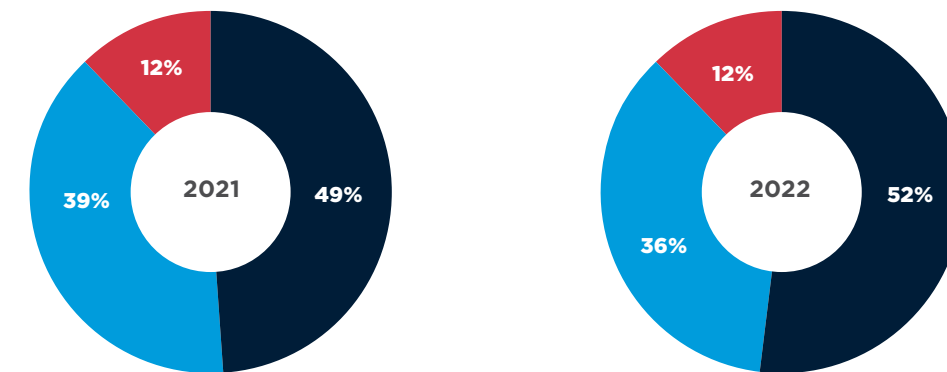
### COVID-19 Impact

■ Increase ■ Stay About the Same ■ Decrease

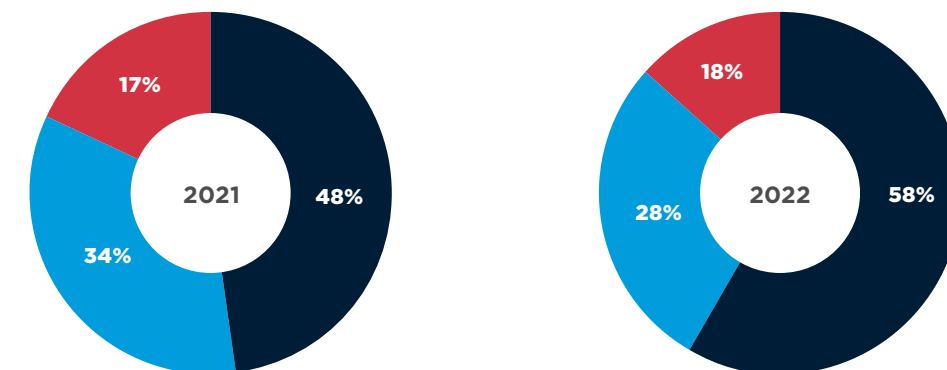
Number of Relocations Performed



Complexity of Relocation Administration



Difficulty Recruiting Employees to Relocate



## COVID-19'S IMPACT ON EMPLOYEES

The pandemic presented numerous risks and challenges for employees. While the emergence of the delta variant proved the pandemic is still dangerous, the general public gained broader and more normalized access to vaccines and tests.

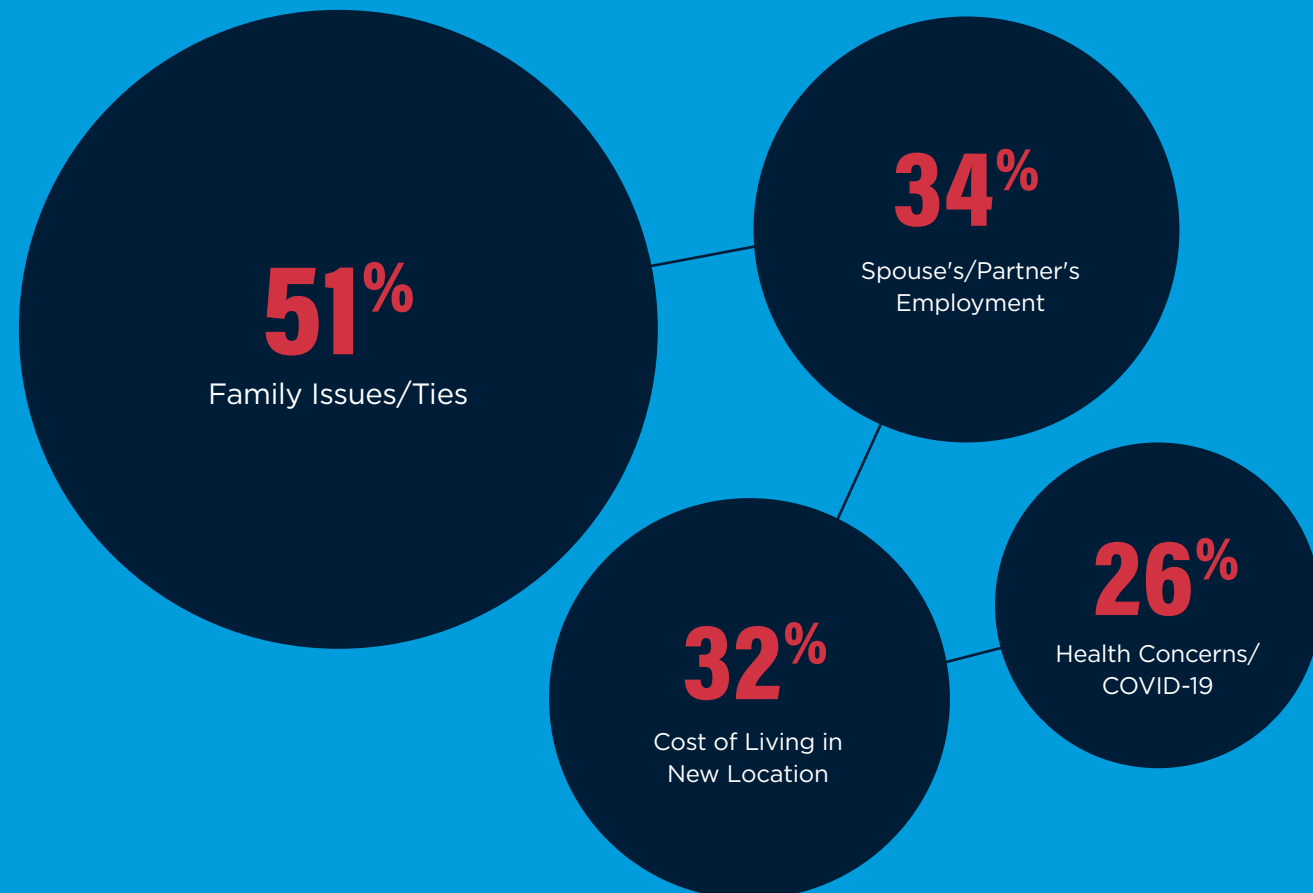
In 2020, COVID-19 was the main reason employees declined relocation, but 2021 data shows a more complicated picture. The importance of COVID-19 has decreased since 2020, trailing behind other considerations for family issues/ties, spouse/partner employment, health/safety as well as the cost of living and spouse/family ties. Companies almost always reported multiple reasons for failed relocations.

- COVID-19 was implicated in the failure of 29% of international relocations, and only about 1 in 4 domestic relocations (26%), a decrease from 44% in 2020.

- In all relocations, Family Issues/Ties, Spouse/Partner Employment, and Cost of Living were more important than COVID-19. This is a drastic shift from 2020, and a return to pre-pandemic trends.
- In international relocation, COVID-19 was the second-most-important reason for an employee to decline relocation, with other Safety Concerns (war, terrorism, political unrest, etc.) taking precedence.
- It is likely the case that in 2022 and beyond, spouse/family considerations will remain a top influence on employee relocation tied closely with concerns about cost of living. For international relocations, it's likely the case that 2022 will see an increase in Safety Concerns depending on the relocating employee's locale and destination of relocation.

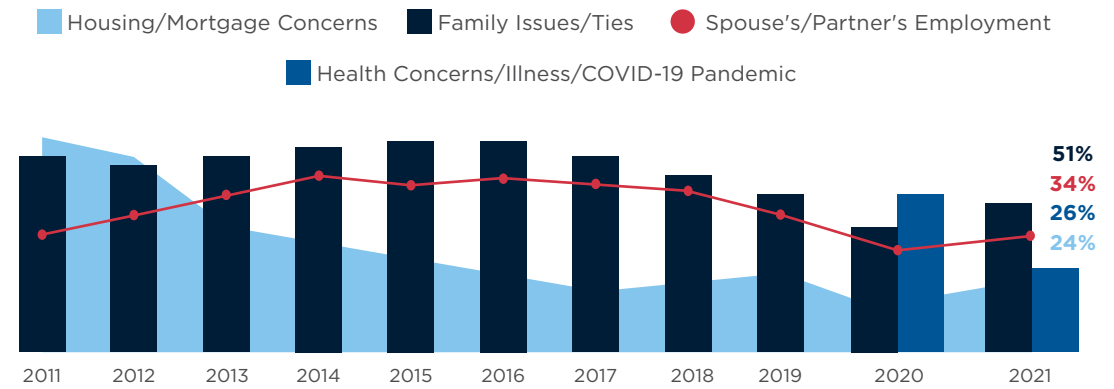
### Top Reasons for Employees Declining Relocation

In 2021, what reasons were cited for an employee declining relocation?



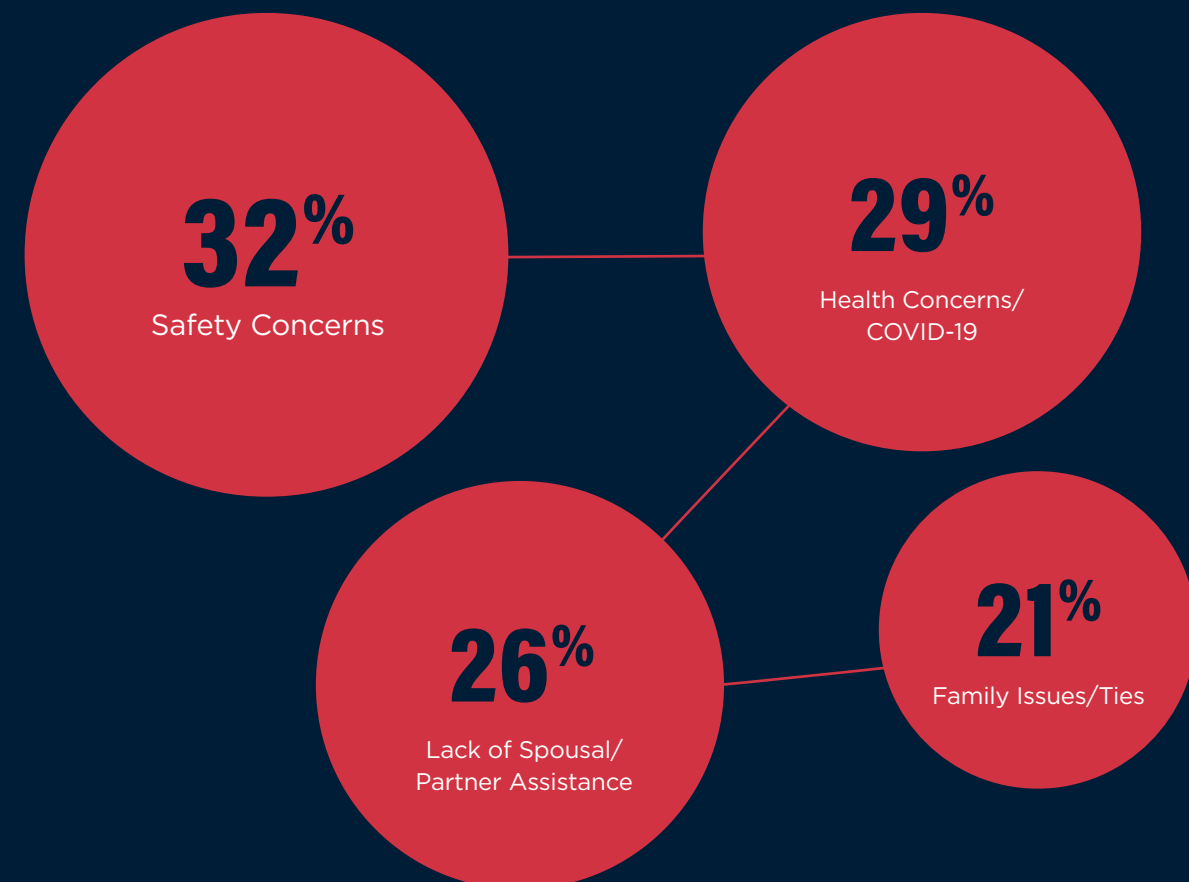
### Select Reasons Relocations Declined: 2011-2021

What reasons did employees give for declining relocation?



### Top Reasons for Employees Declining International Relocation

In 2021, what reasons were cited for an employee declining an international relocation or for an international relocation to fail?

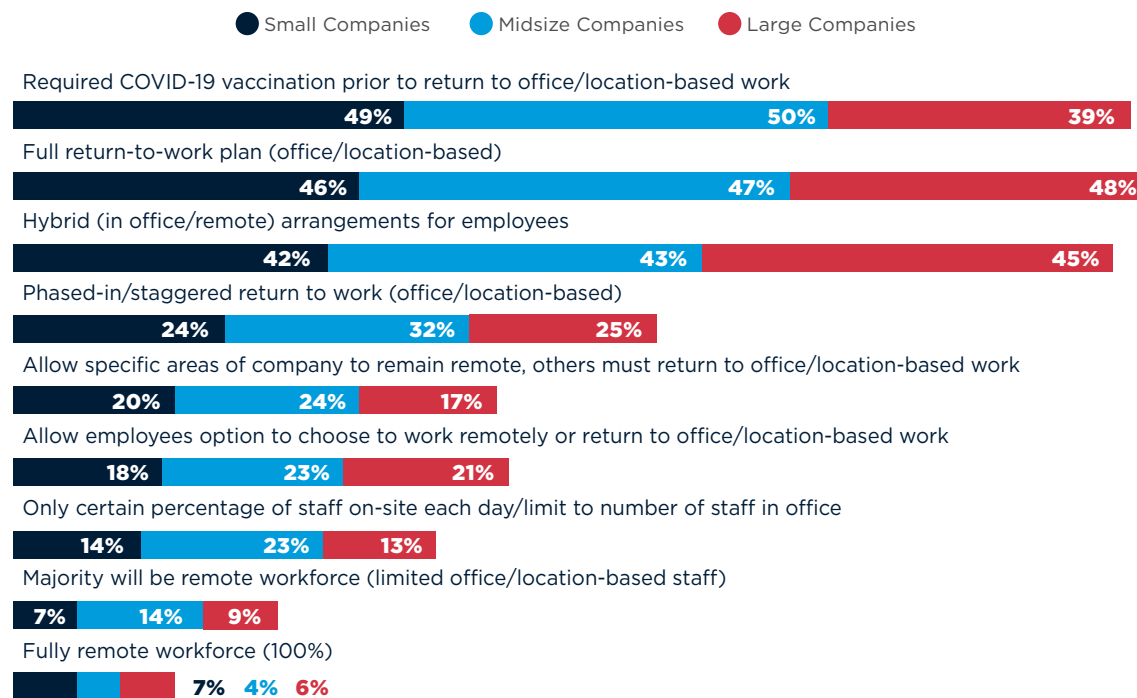


## POST-PANDEMIC WORKPLACE MANAGEMENT

Worldwide, national, and local coronavirus restrictions are easing and companies are making plans for what work looks like after the pandemic ends. Companies indicate that their post-pandemic plans for 2022 will be required COVID-19 vaccinations, a full return to on-site work, or a hybrid workplace arrangement for employees. We anticipate hybrid workplace management to be a mainstay of post-pandemic workplaces, and remote positions will be highly coveted.

- 47% of all companies are planning for a full return to on-site work, with 43% planning a hybrid work environment.
- 47% of companies are requiring employees to be vaccinated against COVID-19.
- A minimum of companies—only 11% overall—anticipate that their workforce will remain fully remote.

### Post-COVID Return-to-Work Plans



## REMOTE/HYBRID WORK

Remote work was a game changer for companies and employees. As companies begin to examine safe back-to-work policies, they should be aware of growing favor for remote work among employees.

A Pew Research Center survey indicates that employees are opting to work remotely not because of COVID-19, but because they prefer it. Remote work has resulted in more autonomy for employees, from managing households and schedules to choosing where they live. The Pew survey also found that both employees and employers feel that productivity has increased from

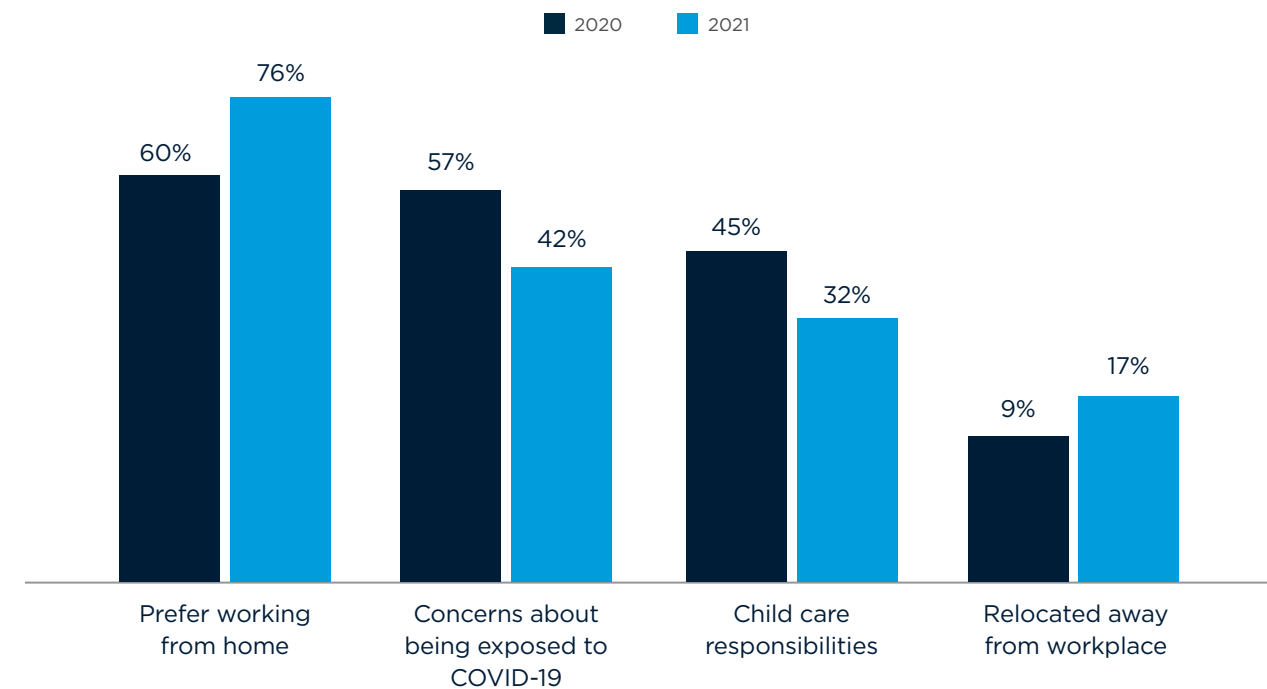
pre-pandemic levels as a result of increased employee flexibility and autonomy.

This preference for remote work is impacting job-seeking behaviors as well. A Gallup poll found that 30% of workers expressed an intent to leave a job if remote work was not an option.

Similarly, Gallup found that hybrid work environments were the most favorable, with 91% of workers polled expressing a desire to maintain an option to work from home.

## Fewer workers now say they're working from home because of concerns about coronavirus exposure, compared with 2020 (Pew Research Center, 2022)

Among employed adults whose workplace is currently open, % saying each is a major reason why they are working from home all or most of the time



### WHAT IS HAPPENING:

- The specific impact of COVID-19 is decreasing for employees, with common access to vaccines, coronavirus testing, PPE, and other layers of protection from companies' internal COVID-19 hygiene policies. However, the pandemic is one of many global trends driving inflation and creating cost-of-living concerns for employees that might create a stronger reliance on dual-income households—a major barrier to successful relocations.
- Remote and hybrid work is likely here to stay for industries and companies that can accommodate it. Employees appear to prefer this type of workplace management and are likely to seek it out.

### WHAT COMPANIES CAN DO:

- Companies should track the reverberating effects of COVID-19 as it has impacted employee attitudes around personal safety as well as workplace management and norms.
- While not all industries are able to offer remote or hybrid work, companies that are able to do so can foster competitiveness by offering hybrid/remote positions.

## RECOMMENDATIONS

# MEETING THE NEEDS OF EMPLOYEES

Family and spouse considerations take precedence for employees. Offering strong assistance programs is a must to incentivize moves.

The landscape of employees' main concerns has shifted significantly from 2020, when COVID-19 was the top reason that employees declined relocation. However, there is a growing complexity in employee considerations, influenced by the reverberating impacts of the pandemic on the economy and society.

## In 2021...

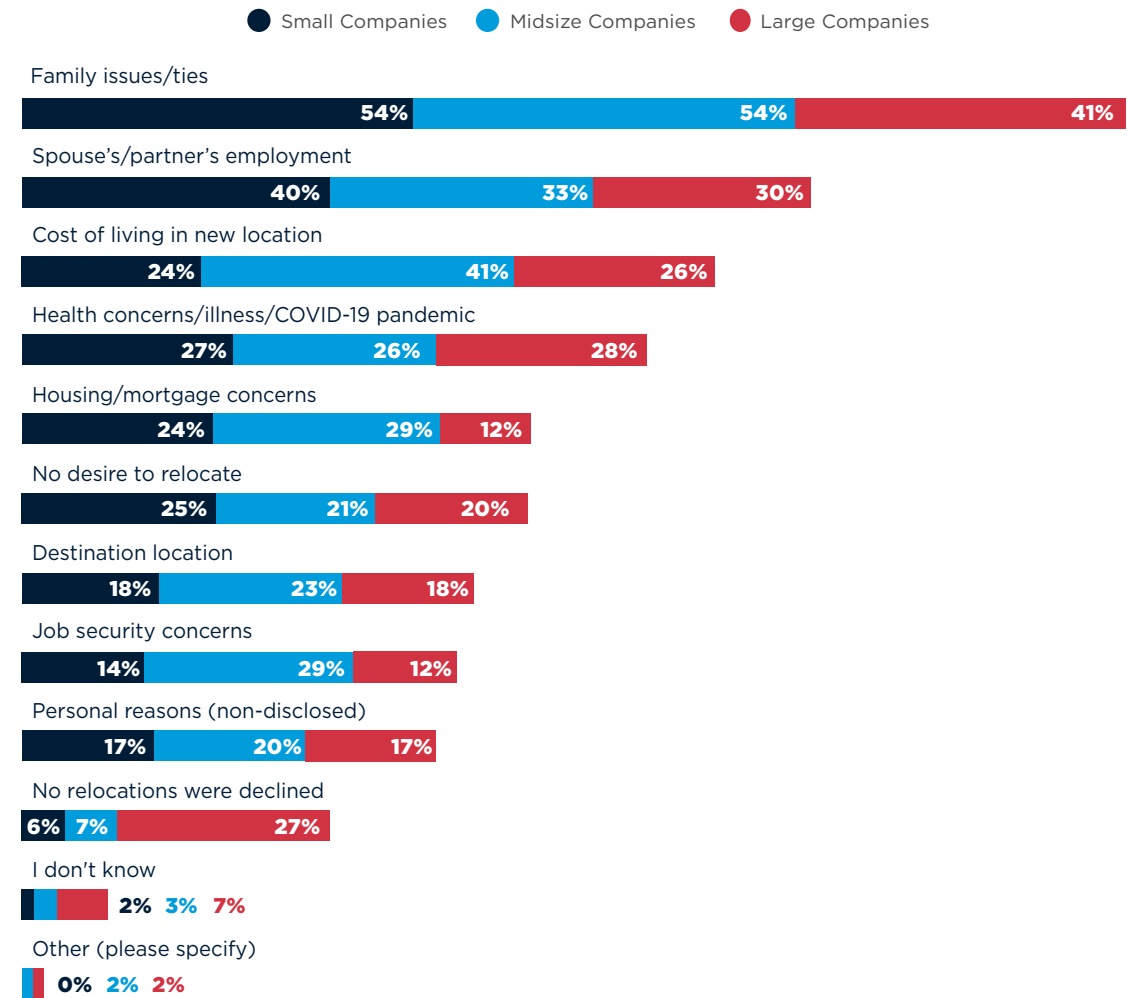
**51%** of companies cited said employees declined relocation because of family issues/ties.

**34%** of companies cited said employees declined relocation because of their partner or spouse's employment.

**32%** of companies said employees cited cost of living in a new location as a deterrent.

Health concerns/illness/the COVID-19 pandemic was the fourth most important consideration, cited by nearly 1 in 4 (26%) companies, nearly tied with housing/mortgage concerns (24%).

## Reasons Employees Declined Relocation



These concerns may be exacerbated by growing inflation in 2022. As the workforce is hit hard economically, dual incomes will become more vital for households to maintain financial stability. Workers may even relocate on their own to locales with lower costs of living. In addition, the majority of the workforce consists of Gen X and millennial workers

who are dual caretakers of their children and their aging or elderly parents.

In 2022 and beyond, companies should review their employee assistance policies to identify where current offerings can be strengthened.

## Median Age of the Global Labor Force



CITATIONS: Statista, 2022



## SPOUSAL ASSISTANCE

Matching pre-pandemic trends, considerations about family and partner/spousal support are the leading issues for employees considering relocation. An employee's spouse or family situation can make or break relocation efforts. Even as spousal assistance policies grow more robust over time, companies must ensure these policies target the needs of prospects.

- Around a quarter to a third of companies indicated that a lack of assistance for their spouse/partner was the reason for a declined relocation, domestic or international.

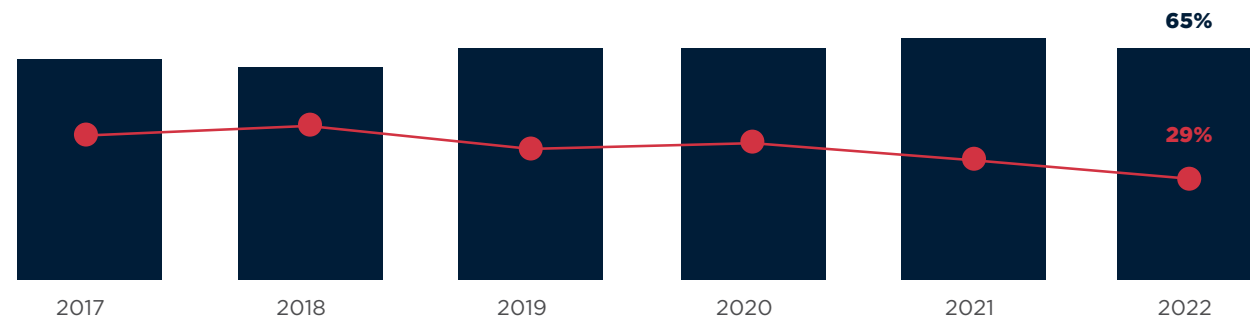
- Family and partner/spousal considerations were more prominent in domestic relocations, resulting in a 10% higher rate of failure than international relocations, where safety and health took precedence.
- 1 in 2 companies saw relocations fail due to the employee's family issues/ties.

Most companies do offer spousal assistance, with 65% of companies finding that providing partner/spousal assistance positively impacted relocation efforts.

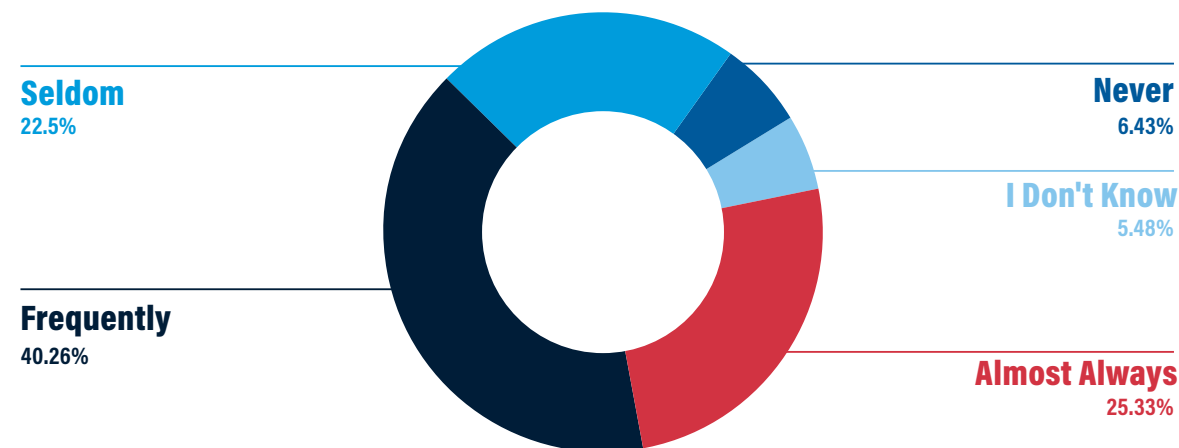
### Spouse Employment Impact: 2017-2022

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

● Seldom/Never ● Almost Always/Frequently



### Frequency of Employee's Relocation Affected by the Employment Status of That Employee's Spouse/Partner

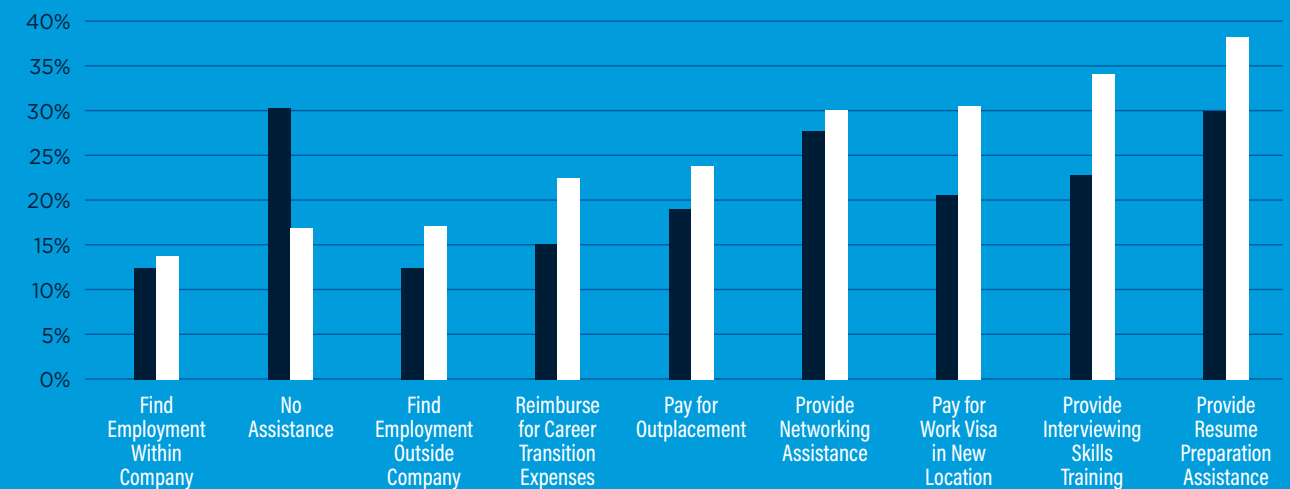


All types of spousal/partner assistance are offered at higher rates by companies that relocate employees internationally, compared with domestic relocations.

Large companies (5,000+ employees) are the most likely to offer no assistance to employees for both domestic and international relocations. Small companies are second most likely to offer no assistance for domestic relocations, specifically.

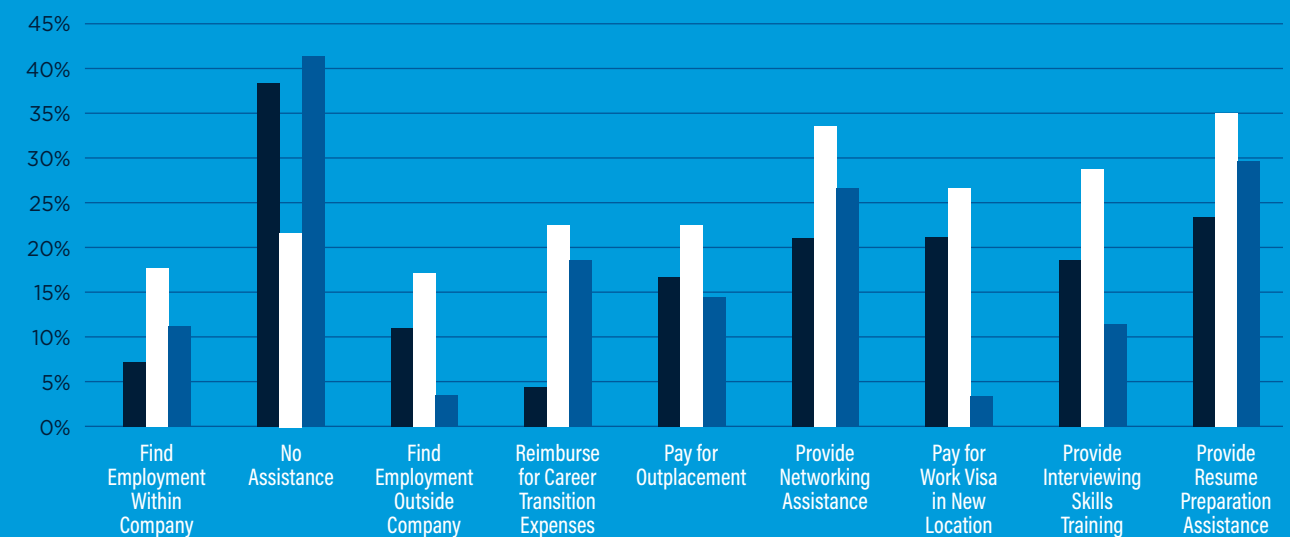
### Spouse/Partner Employment by Domestic/International

■ Domestic ■ International

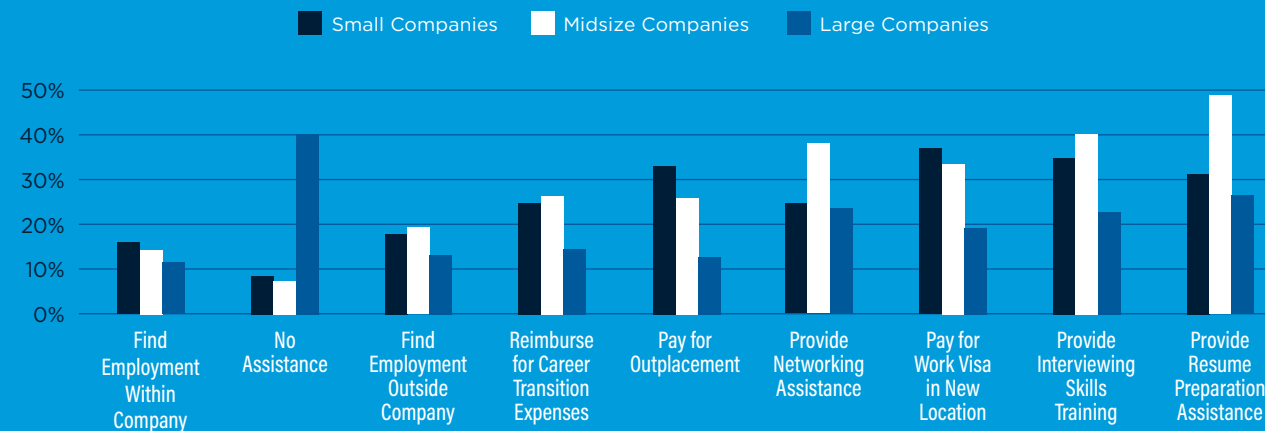


### Domestic Moves by Company Size

■ Small ■ Midsize ■ Large



### International Moves by Company Size



#### THERE ARE GAPS IN SPOUSAL ASSISTANCE POLICIES OFFERED BY COMPANIES AND POLICIES ACCEPTED BY EMPLOYEES.

The number of companies overall offering spousal employment assistance has been increasing every year since 2007 and rested at an all-time high in 2021 at 79% for all companies, and 90% for international relocations. In 2022, this trend persisted year over year from 2021, with around 79% of all companies offering some form of spousal assistance.

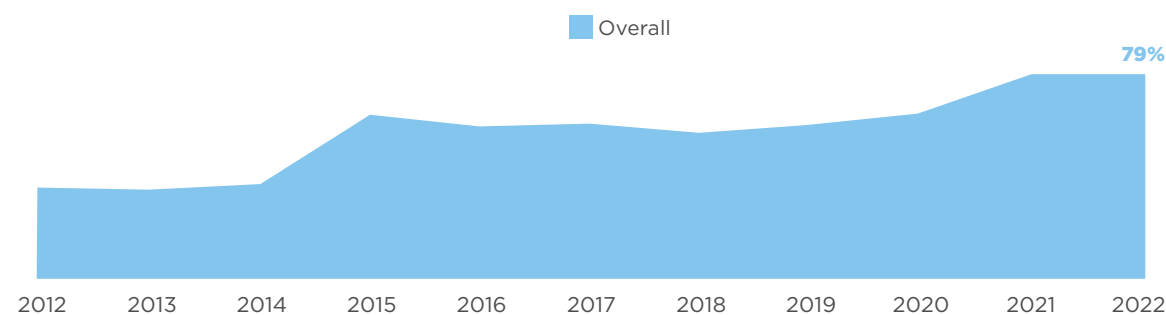
However, 20% of all companies indicated they offered no assistance. On average only 1 in 5 employees with a spouse accepted spousal assistance in 2021 (roughly 22%). This is consistent with the past four years and suggests a disconnect between policy offerings and employee needs.

Resume preparation assistance, interview training, and networking assistance was the three most common types of assistance provided. Career transition expenses, help to find employment outside the company, and help finding employment within the company were the three least offered types of assistance.

Large companies (5,000+ employees) were the most likely to not offer assist for spouses, with 40% of companies indicating as such (compared with 22% of small companies and 12% of medium companies). These are significant differentiators that can be leveraged in recruiting materials for small and medium firms.

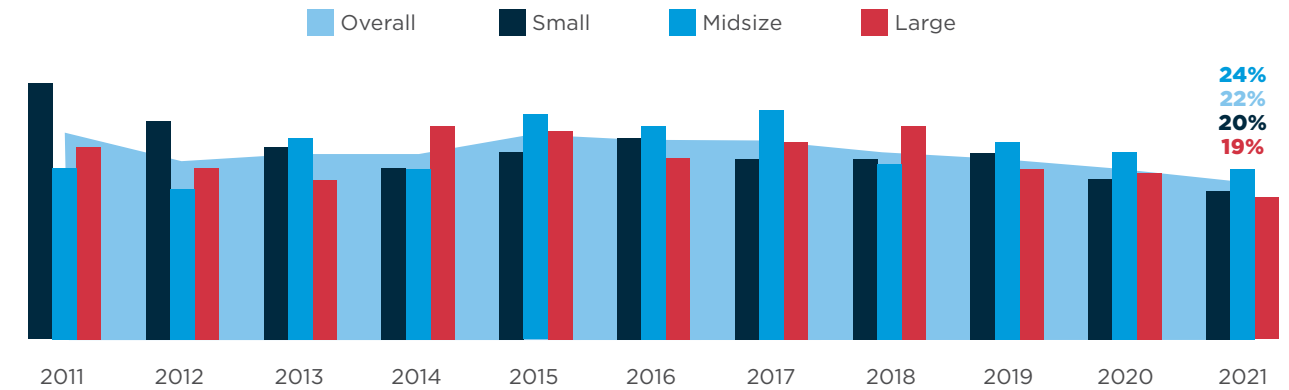
### Spouse/Partner Employment Assistance: 2012-2022

Overall percentage of firms offering spouse/partner assistance



### Spouse Employment Assistance Usage: 2011-2021

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



## ELDER AND CHILD CARE ASSISTANCE

For millennials and Gen X workers, child and elder care go hand in hand.

Gen X and millennials form the largest populations within the current workforce. These two generations are the most likely to find themselves as dual caregivers for children and aging parents. Following the trend of spousal assistance, employers must ensure caregiving assistance policies are robust enough to meet the needs of relocating employees.

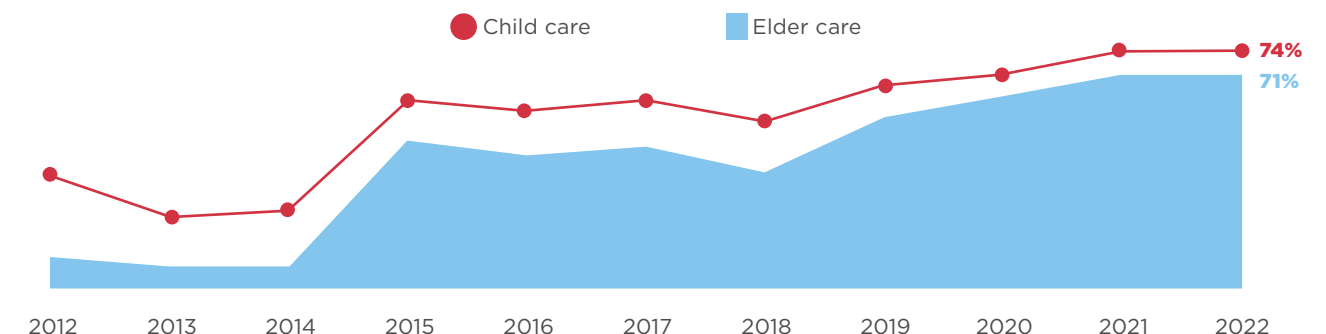
Like spouse's employment, family issues/ties are a major deciding factor for employees considering relocation. For both child care and elder care, the majority of companies offer informative/educational resources, including care agencies/services (day care, elder care); however, these

offerings tend to come at a higher rate than financial offerings such as the use of paid personal days or pretax dollars to manage care.

- Nearly 1 in 4 companies offer no child care assistance, with slightly more offering no elder care assistance (at 29% of all companies offering none.)
- Depending on location, demographic, and other individual situations, aging parents experiencing health issues may also be affected by economic trends, necessitating cohabitation with or financial reliance on their children.

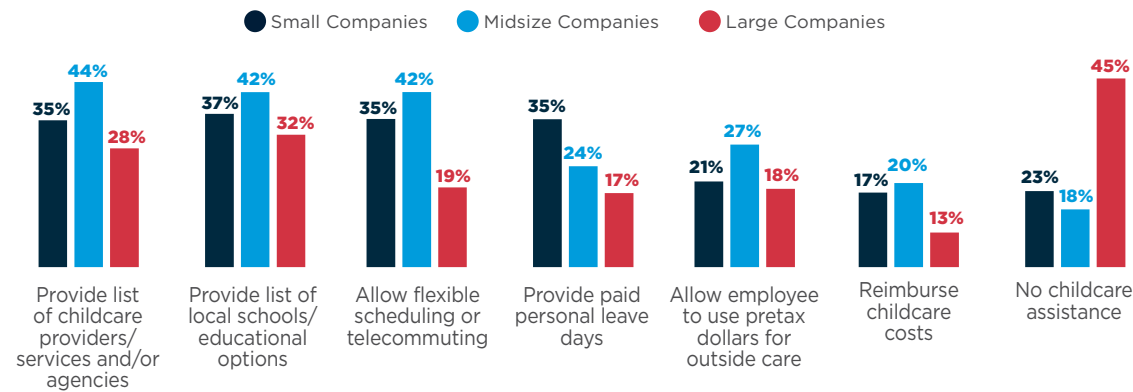
### Child care & Elder care Assistance: 2012-2022

Percentage of firms offering this assistance



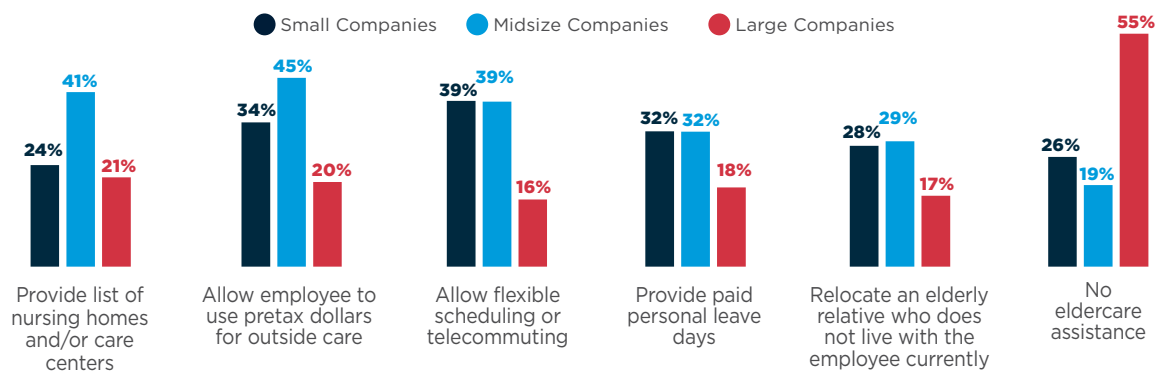
### Child care Assistance

What assistance does your company provide to the relocating employee as it relates to child care?



### Elder care Assistance

What assistance does your company provide to the relocating employee as it relates to elder care?



## HOUSING

Cost of living (32%) is one of the top three reasons respondents declined relocation in 2021. As the cost of living and inflation continue to rise in 2022, this consideration may pose a challenge for relocations through 2022. Cost-of-living considerations compound complexities around reliance on spouse or partner employment or the ability to find housing in a new location. Another aspect of this landscape is a steeply competitive real estate market, with low inventory and high prices. For homeowners, the homebuying process in a new locale may pose a challenge.

Across companies, it's most likely that employees are given two or three house-hunting trips. Of those trips, 10% of all companies offer five or fewer days of expense-paid house-hunting trips, and only 4% offer five or more days of expense-paid house-hunting trips.

### CURRENT HOMEOWNERS

When relocating homeowners who are buying in the new locale:

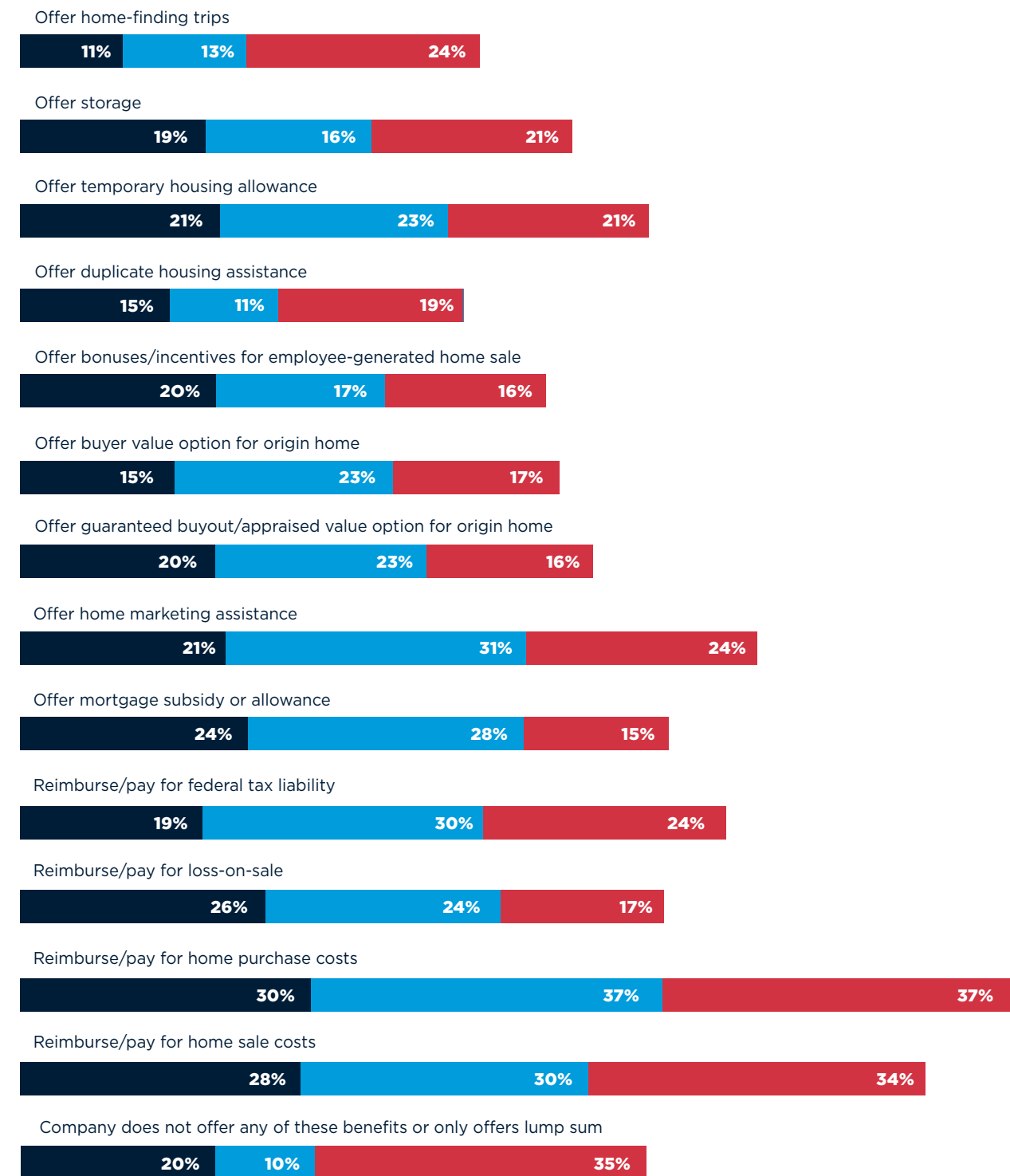
- Around 1 in 3 companies (34%) reimburse/pay for home purchase costs.
- 30% reimburse/pay for home sale costs.
- Around 1 in 4 offer home marketing assistance, federal tax liability, mortgage subsidies or allowances, and reimbursement/payment for loss-on-sale.

Only 21% of companies offer a temporary housing allowance to relocating homeowners. Some companies may want to consider adding this offering to their current policies to help incentivize homeowners to relocate to highly competitive markets. For 2022, 1 in 2 companies are anticipating changes to policy dealing with extensions/allowances for temporary housing.

## Relocating Homeowners

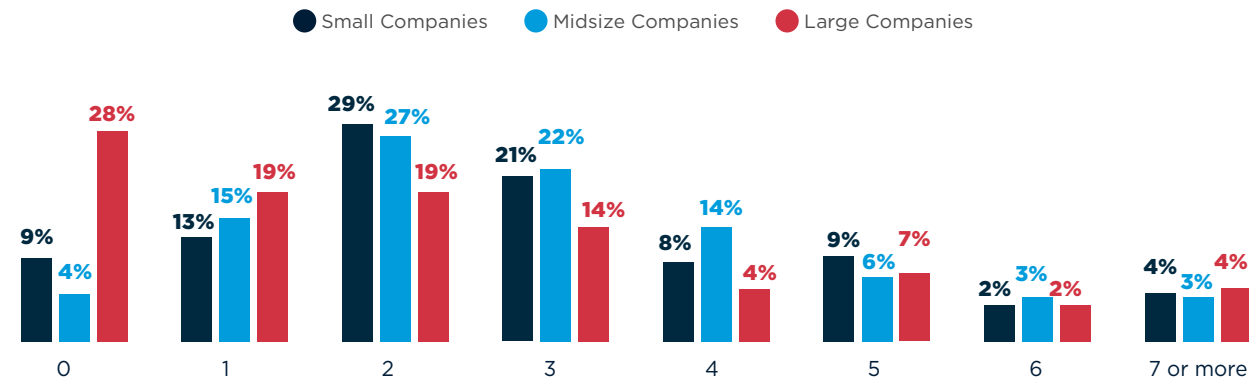
When a relocating employee is a current homeowner who will be buying, does your company...

● Small Companies ● Midsize Companies ● Large Companies



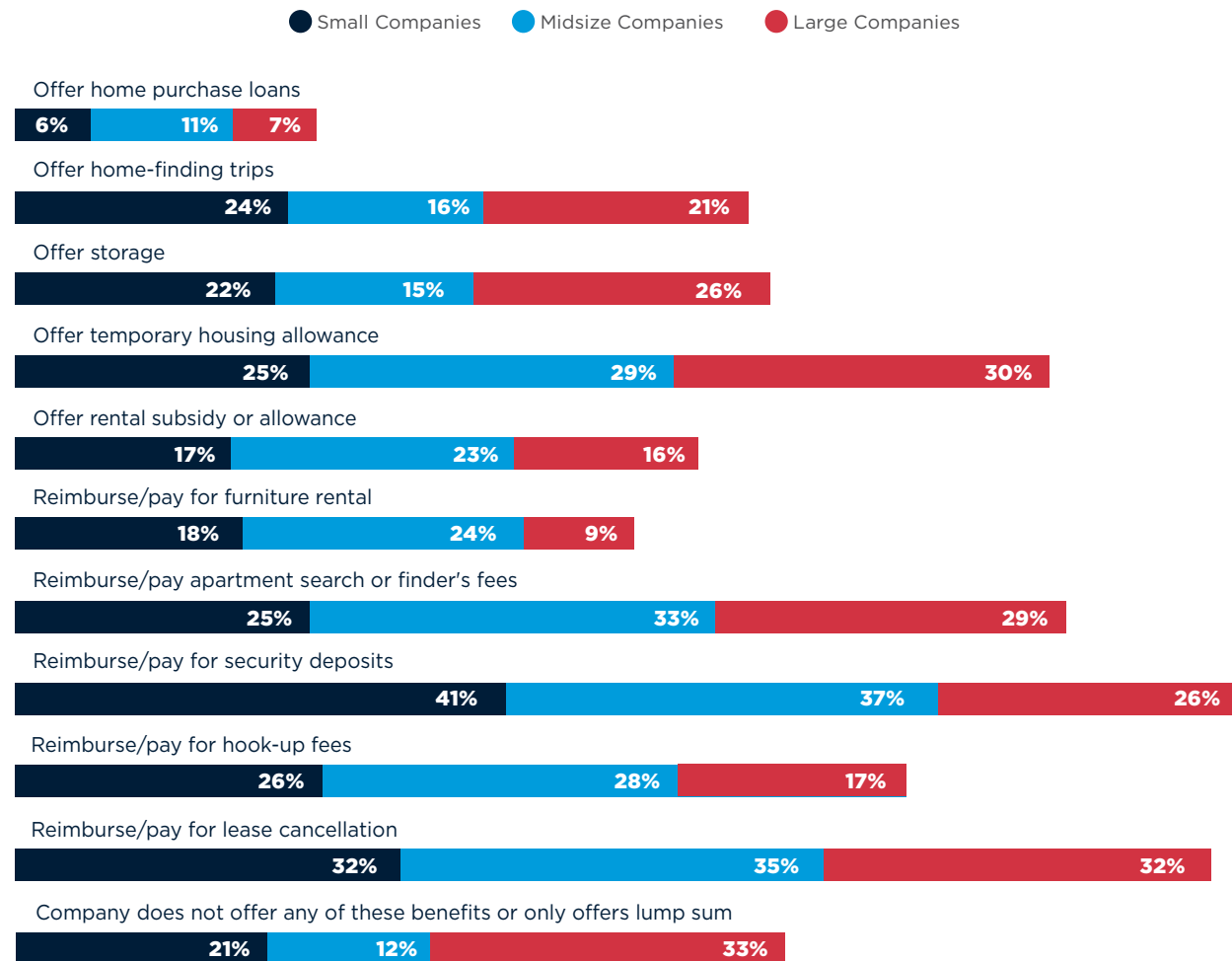
### Employee House-Hunting Trips

How many expense-paid house-hunting trips with spouse/partner to the new location does your company allow for an employee undergoing relocation?



### Relocating Renters

When a relocating employee is a current renter, does your company...



### CURRENT RENTERS

When relocating employees are renting:



The above figures are aggregates of chart data on Page 32.

Given the current state of the real estate market, companies may benefit from increased house-hunting assistance for 2022 and beyond. Currently, around 1 in 5 companies made changes in 2021, with about the same anticipating changes in 2022.

### WHAT IS HAPPENING:

- A majority of the global workforce consists of workers in the Gen X or millennial generations. Individuals in this demographic are the most likely to be "sandwiched" between caretaker roles for their own children and their aging parents. For the current workforce, family ties are extremely influential.
- As cost-of-living concerns mount due to inflation, many households may increasingly rely on dual incomes for financial stability. Spousal assistance may become a critical component of successful relocations in the future.
- In the United States, the housing market is extremely competitive. House-hunting assistance may not be sufficient for homeowners seeking relocation as inventory shrinks and demand rises.
- Trends in employee acceptance of assistance offered is lower than expected, with only 1 in 5 employees accepting assistance, despite a majority of companies reporting that offering assistance has a strong positive impact on successful relocations.

### WHAT COMPANIES CAN DO:

- Companies should examine the needs of their relocating employees and address gaps in policy as needed.
  - » Increase house-hunting opportunities/assistance in finding housing for homeowners and renters.
  - » Increase temporary assistance.
  - » Increase or update spousal assistance programs.
  - » Grow practical family support assistance, including paid leave to care for elderly parents.
- Review hybrid/remote work offerings for relocating employees. Hybrid/remote work allows employees to live outside metropolitan areas, increasing the chances of finding a home faster and saving on living costs.

RECOMMENDATIONS

# POLICY ADMINISTRATION

COVID-19 rules have forced some corporations to rethink relocation policies, packages, strategies, and operations. It appears that every year organizations are willing to review their policies to allow employees to have more flexibility and make better use of their benefits. Improving employees' relocation experiences during this recovery period seems necessary for all company sizes.

**Most companies centralized their relocation/mobility departments to develop relocation policy (49%), develop mobility risk management and mitigation (35%), and audit GDPR data privacy compliance during relocation (28%). Reimbursement relocation expenses are often paid in full (46%) or by lump-sum benefits (38%), or managed by cap programs (32%).**

Human resources professionals have worked with other parts of the organization to offer attractive relocation packages to match and retain talented employees with the employer's goals. As workplace management shifts, we still see gaps between what employees want versus what employers offer.

## TECHNOLOGY + COMMUNICATION

**Email (59%), text message (43%), and instant messaging services (41%)** are the primary modes of communication during the relocation process.

It is advisable to provide other online resources such as FAQ, information pages, or online portals that allow employees to have a centralized source of information around the relocation process, from how to prepare to logistical considerations.

### Modes of Communication in the Relocation Process

How was the internet/technology used for relocation-related matters in 2021?

Communicate via email with relocating employees	59%
Communicate via text messages with relocating employees	43%
Communicate via instant messaging apps (e.g. Slack®, Microsoft® Teams, etc.) with relocating employees	41%
Utilize external social media/networking tools	20%
Utilize company intranet platforms	23%
Verify GDPR/data privacy compliance of relocation provider(s)	17%
Research relocation-related matters (policy, benchmarking, etc.)	21%
Research relocation service providers	18%
Use web-based software platforms to manage/vet suppliers	14%
Audit/verify prices quoted for relocation services	14%
Initiate/execute employee relocation services	15%
Complete online forms for employee relocation	17%
Access relocation company website for reporting or other services	17%
Utilize mobile applications from relocation providers	13%
Data integration with relocation providers (API arrangements, etc.)	13%
Analytics/reporting on relocations/relocation provider service	13%
Dashboards/online reporting	10%
Did not use the internet for relocation-related matters in 2021	6%
Other	0.38%



## REIMBURSEMENT + LUMP-SUM BENEFITS

### RELOCATION REIMBURSEMENT

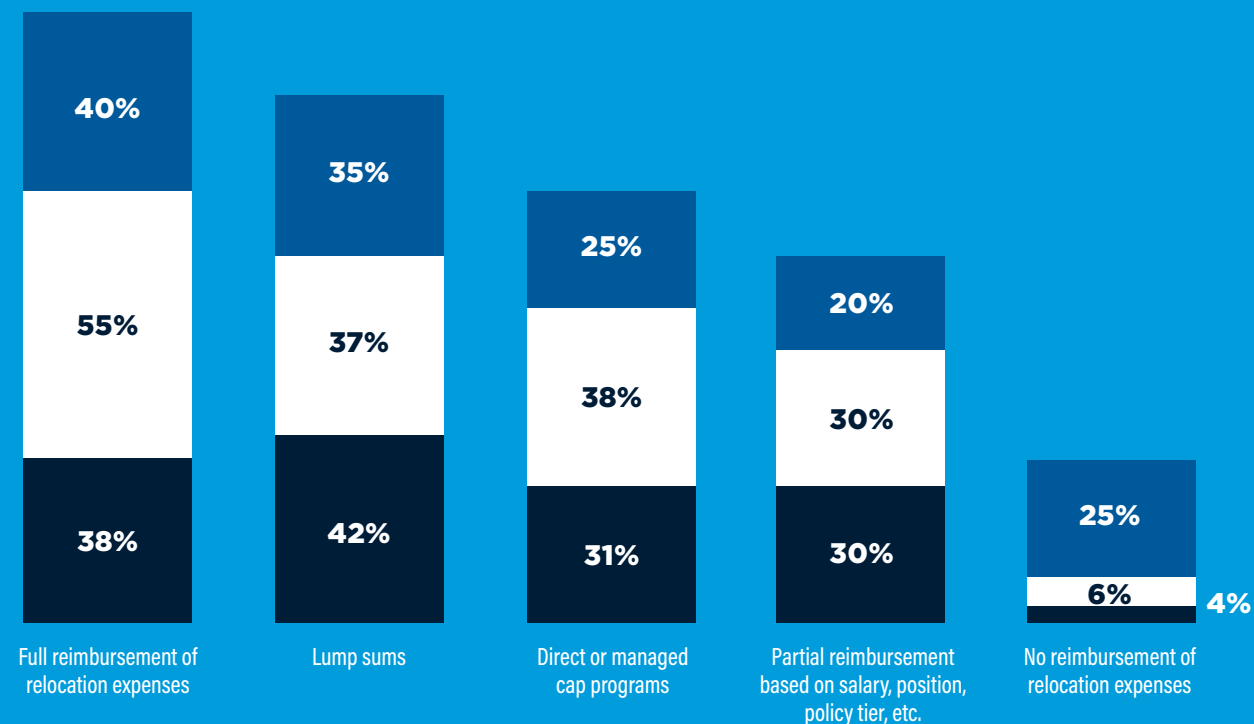
Overall, 46% of companies offer full reimbursement of relocation expenses, followed by 38% offering lump sums and 36% offering direct or capped programs.

Midsize companies are the most likely to offer full reimbursement for relocation expenses, with nearly 1 in 2 midsize companies using this policy as compared with roughly 2 in 5 small or large-sized companies. Likewise, midsize companies are slightly more likely to offer direct or managed cap programs compared with large and small-sized companies.

### Reimbursement Relocation Expenses

To what extent does your company reimburse relocation expenses:

● Small Companies ● Midsize Companies ● Large Companies



### POLICY TIERING

Companies of all sizes are tiering to guarantee the desired support and flexibility. Policy tiering has facilitated eligibility criteria and served employees at different levels with unique mobility objectives.

#### PROS

- Support flexibility with multiple tiers.
- Provides a range of support and delivery levels for each service/policy component.

Companies of all sizes have at least two tiers (or levels) within their relocation policies for domestic, international, short-term assignments, permanent transfer, localization (international), and extended business travel. Some companies have three tiers or more for long-distance commuter and intra-regional (international).

#### CONS

- Tiered systems do not account for employees' individual situations, lumping them instead into predefined categories.
- Some benefits may go unused.

### Policy Tiers

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

● Small Companies ● Midsize Companies ● Large Companies

Assignment Objectives (e.g. developmental, etc.)



Company- vs. Employee-Initiated Relocation



Assignment Location/Region



Homeowner/Renter Status



New Hire/Current Employee Status



Length of Assignment



No Relocation Policy Tiers/Levels



Job or Grade Level (e.g. staff, management, professional, etc.)

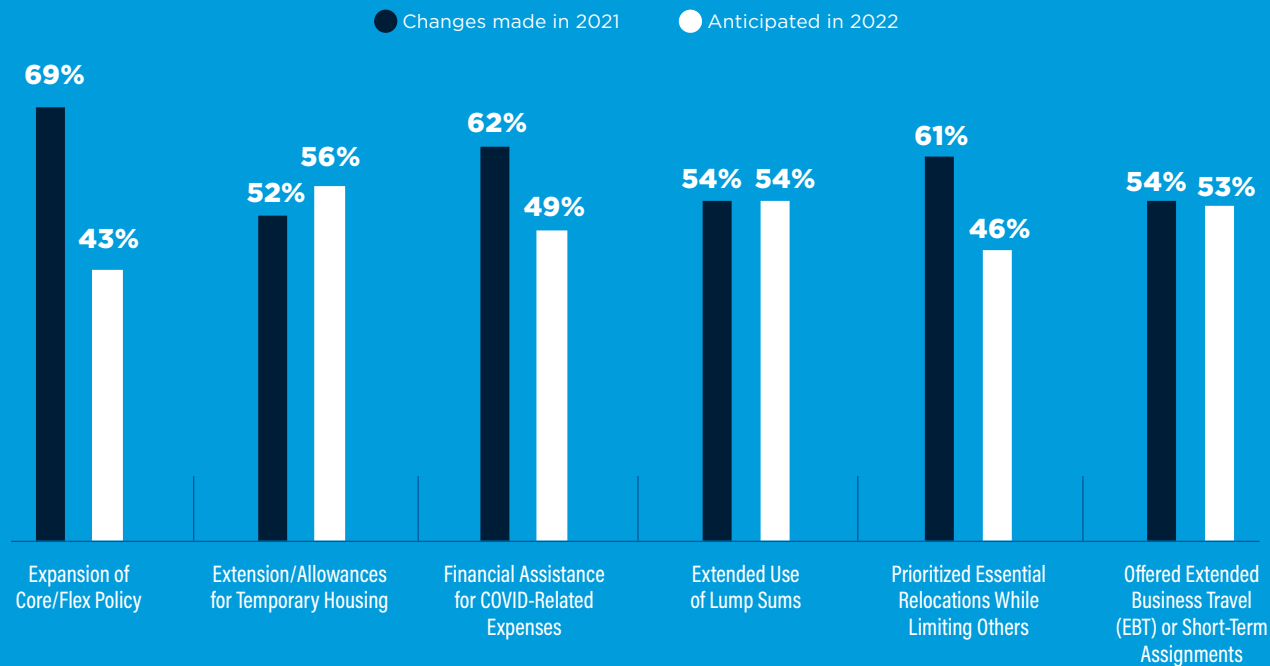


Position/Job Title



### Change in Relocation Policy/Program

Identify changes to relocation policy/programs due to the COVID-19 pandemic that were made in 2021 and/or are expected in 2022.



#### LUMP-SUM BENEFITS

The lump sum's biggest challenge is to provide relocation services that match and customize employees' needs, provide logistical support and are cost-effective. Lump-sum benefits are the second-most-common type of reimbursement offered, after full reimbursement.

- Overall, experienced professionals (62%) are the ones who commonly receive lump-sum payments, followed by executives (51%).
- Domestic relocations (68%) are currently allocated most lump-sum payments.
- By company size, entry-level employees appear to relocate more often within large-sized corporations (59%) and experienced professionals within midsized corporations (65%). Boomers are most likely to advance their careers when accepting relocating to a different assignment and location.
- The finance/procurement department (51%) normally tracks lump-sum spending per employee. The spending is tracked by an online reporting or mobile app (37%). Corporations' typical lump-sum amounts are between \$10,000 and \$12,499 (22%).

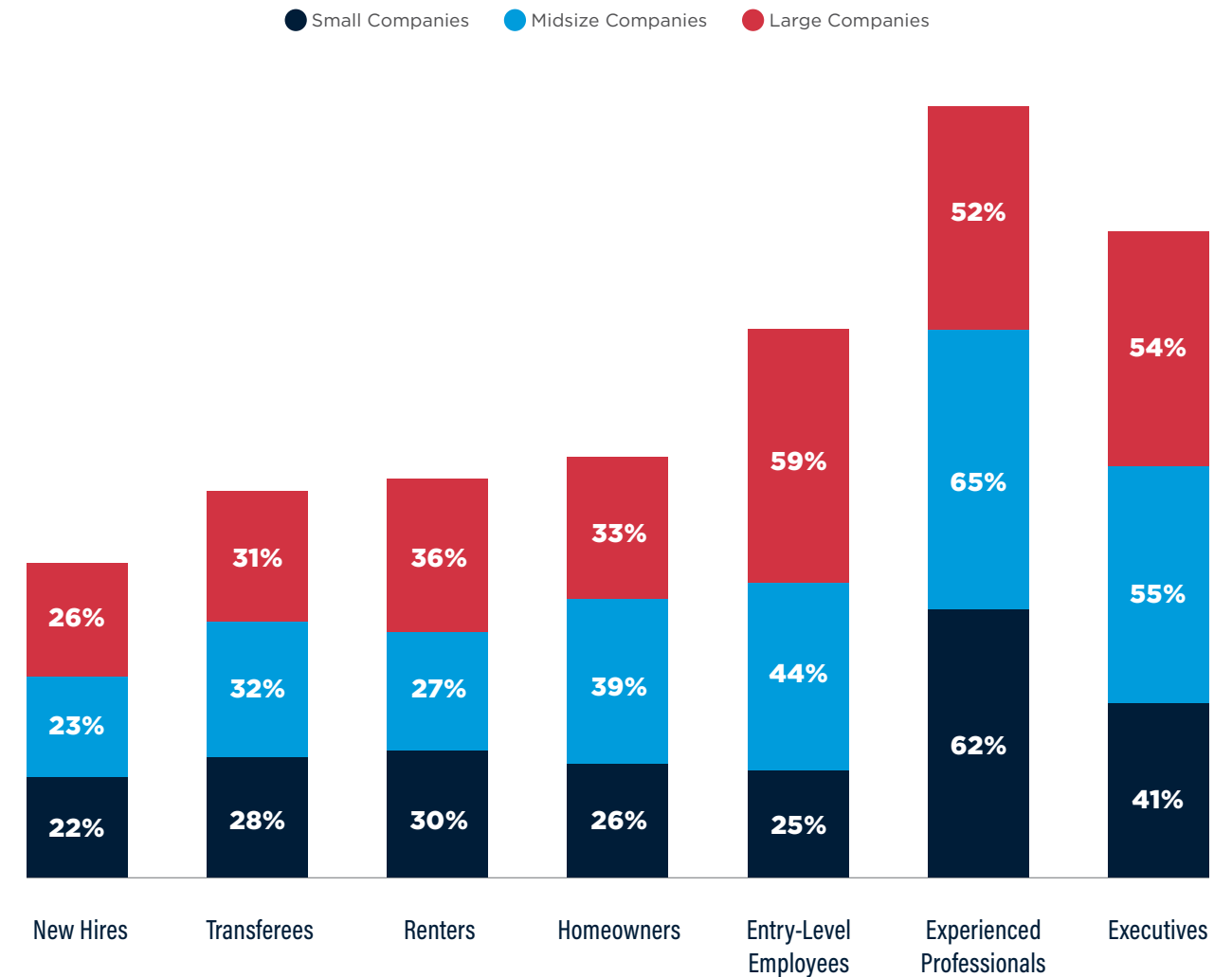
However, given the complexity of employee and employer needs when relocating, it's possible that companies could benefit from adding layers of flexibility and customization to lump-sum offerings. A report from Worldwide ERC® suggests lump-sum benefits can have negative outcomes for both employees and employers.

For employees receiving a lump-sum benefit, a loss of overall workplace productivity and an increase in complexity during the relocation process may result.

For employers, lump-sum benefits are often based on an employee's assigned tier. While a norm across the industry, it's possible that tier-based lump sums neglect to address individual assistance policies that can help facilitate a successful relocation. Employers can use flexible policies to help customize relocation plans and ensure that employees receive all necessary support during relocation.

### Employees Receiving Lump-Sum Benefits

What types of relocating employees most commonly receive lump-sum payments?



## RELOCATION SERVICES

#### OUTSOURCING

The most competitive services outsourced in 2021 were:

- Management of complete relocation programs (40%).
- Counseling about the planning and details of relocation (29%).
- Company policy (29%).

These components reflect the demand for guidance and flexibility of relocation policy necessary during the pandemic. Carrier transportation expenses are usually paid by the company (59%). To adjust to pandemic rules and protect employees, companies may add additional COVID-19 services to meet employees' needs. These services include wearing masks (57%) and gloves (41%) and maintaining social distance (37%).

### Outsourced to Relocation Services

Which of the following services did your company outsource to a relocation service, HRO, or brokerage firm in 2021?

Management of full relocation program	40%
Counseling about the planning & details of relocation	29%
Counseling about company policy	29%
Real estate sales/marketing	22%
Arrangement of family's transportation and accommodations	20%
Property management	19%
Real estate purchase	19%
Did not use a relocation service, HRO, or brokerage firm in 2021	18%
Orientation tours at new location	15%
Expense management/tracking/reimbursement services	14%
Assistance with employee claims preparation and submission	14%
Contract of household goods carrier	14%
Coordination and monitoring of shipment	13%
Tax gross-up assistance	13%
Compensation services (e.g. payroll arrangements, tax compliance, etc.)	13%
Management of service provider(s) GDPR/data privacy law compliance	13%
Arrangement of family's temporary accommodations	13%
Visa & immigration services	12%
Destination services/orientation tours in host country	12%
Audit and/or payment of invoice(s)	12%
Supplementary services (appliances, cleaning, etc.)	11%
Intercultural and language training	10%
Arrangement of family's travel	10%
Securing rental property in host country	10%
Repatriation services	7%
Other	1%

### COST CONTAINMENT

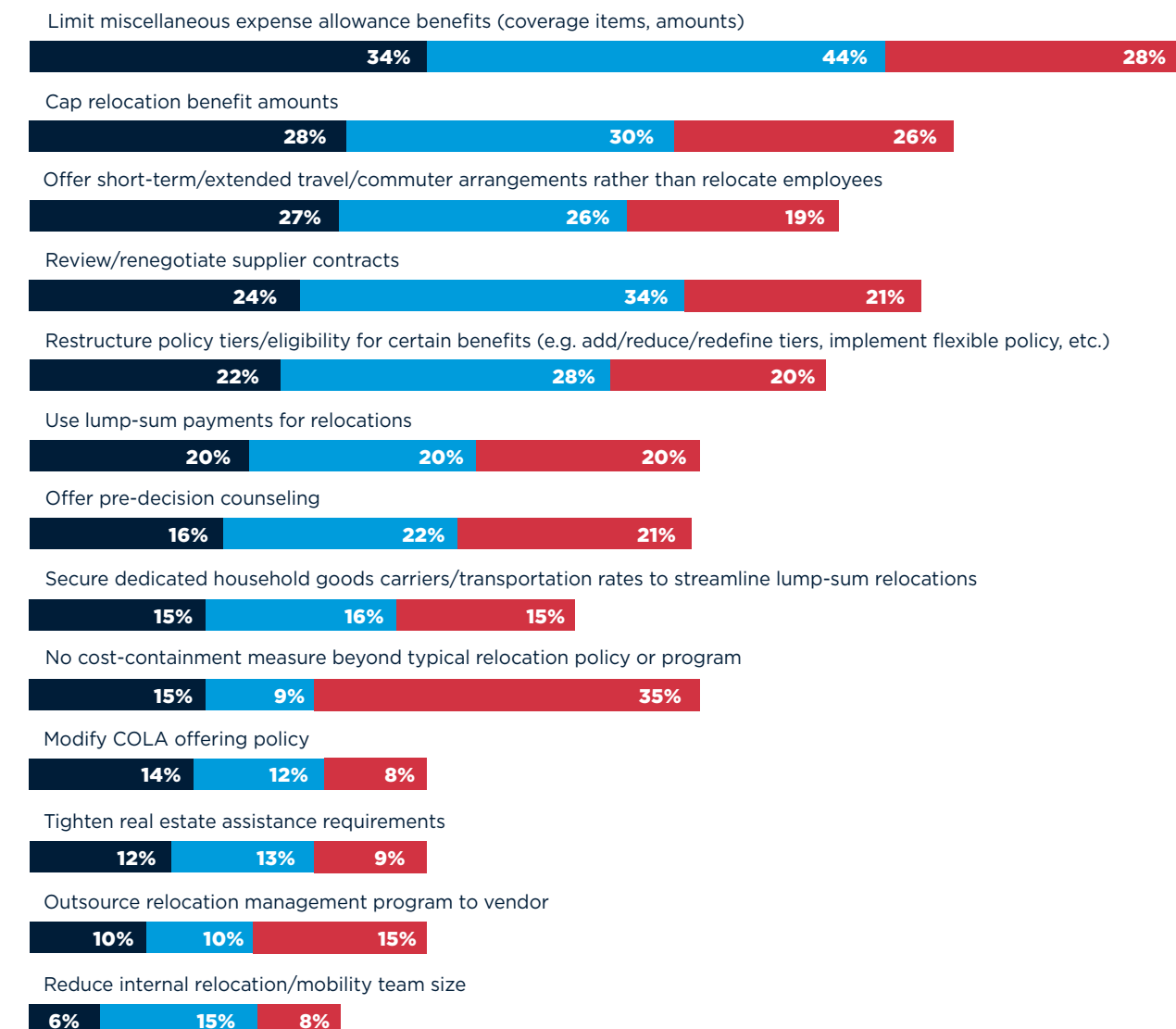
The cost-containment measurements most used in 2021 were to limit miscellaneous expense allowance benefits (coverage items, amounts, etc.) (37%), cap relocation benefits (28%), and review/renegotiate supplier contracts (27%). In 2022, companies plan

to maintain the most popular cost-containment measures in relocation policy. Research suggests that many companies are skeptical about making significant changes until the pandemic is entirely over.

#### Cost-Containment Measures

Is your company planning to use any of the following cost-containment measures in relocation policy/practice in 2022?

● Small Companies ● Midsize Companies ● Large Companies



## POLICY CHANGES + EXPECTATIONS

The significant changes in 2021 by all company sizes were the expansion of core/flex policy (69%), financial assistance for COVID-related expenses (62%), and prioritizing essential relocations while limiting others (61%).

By 2022, Human Resource departments expect policy changes on extension/allowance for temporary housing (56%), expanded use of lump sums (53%), and extended business travel (EBT) or short-term assignments (53%). These improvements can potentially assist with international relocation delays and cost issues, giving more flexibility to employees to use their benefits.

Mid-sized companies offer real estate and rental assistance programs highlighting the importance

of real estate transactions, which helps speed the relocation process and increase employees' willingness to relocate.

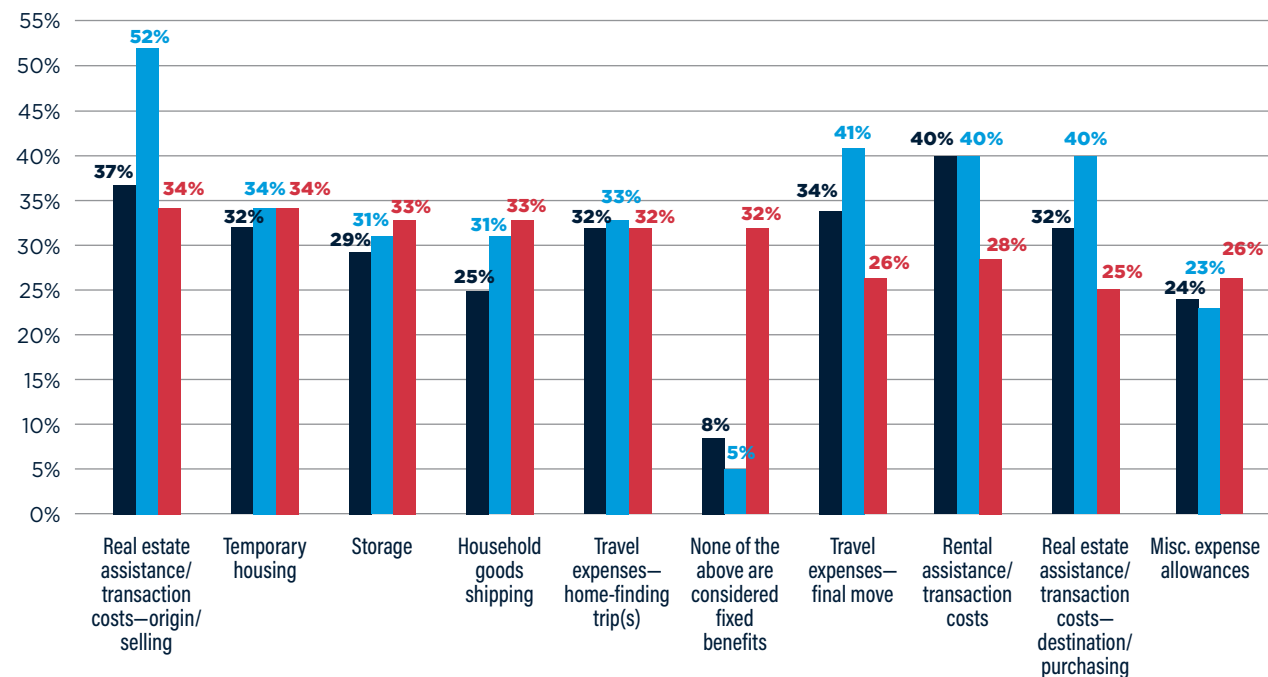
While travel expenses, temporary housing, and household goods had more weight in 2021, real estate assistance, rental assistance, and storage had the most significant importance in 2022 for all companies.

Based on role, most companies relocate mainly Mid-Level employees (44%), followed by Executive/Top-Level Employees (36%), with entry level employees being relocated least often (27%). When considering relocation policy as it pertains to housing, homeowners and renters are nearly matched, at 54% and 50% respectively.

### Fixed Benefits Within Company

What type(s) of relocation components are considered fixed benefits within your company?

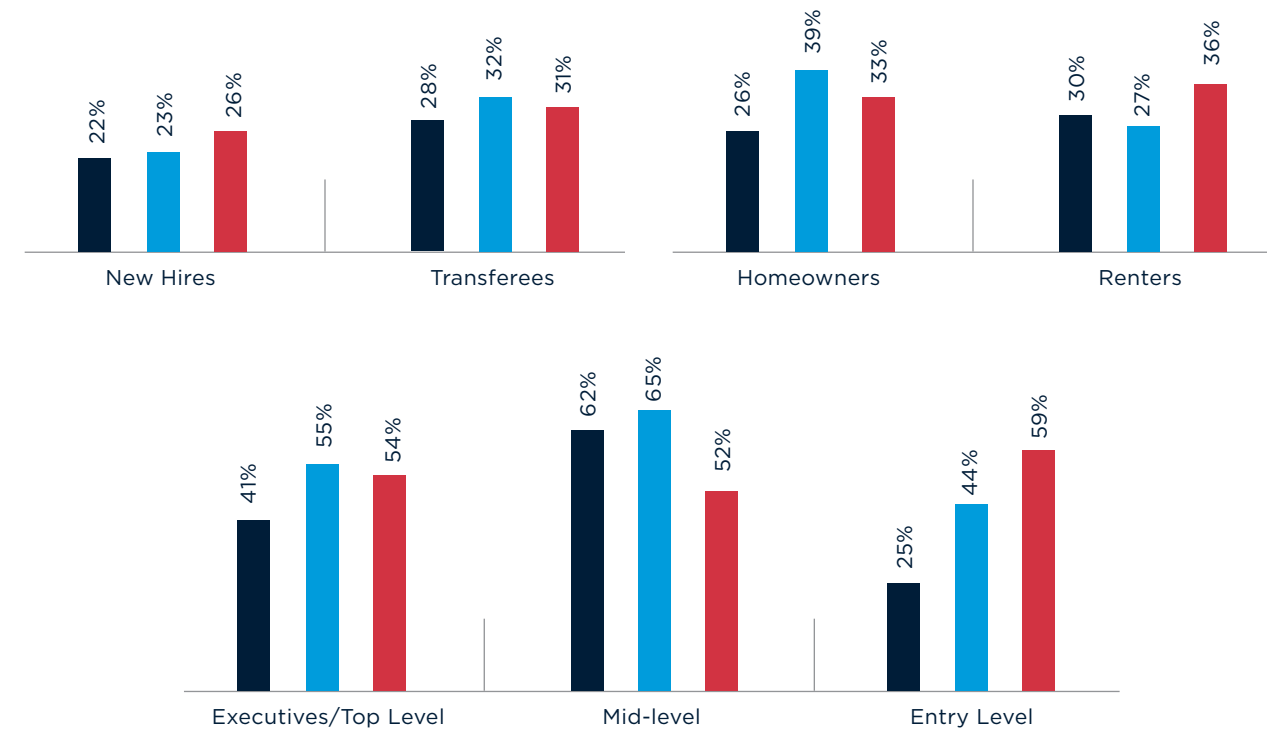
● Small Companies ● Midsize Companies ● Large Companies



### Percentage Relocating Employees

How many of the following types of relocating employees receive lump sum payments?

● Small Companies ● Midsize Companies ● Large Companies



#### WHAT IS HAPPENING:

- With the increasing demand for moving flexibility and personalization, tiered programs must address diverse personal needs. Companies provide additional flexibility within each tier by offering a range of support and delivery levels for each service/policy component. Employees new to relocation, critical talent, homeowners with families, and those with other unique needs will most likely need flexibility in tier programs.

#### WHAT COMPANIES CAN DO:

- The most popular tiers (or levels) are based on position/job title criteria (46%), followed by job or grade-level criteria (39%), and new hire/current employee status (37%). Companies can customize their mobility support and control costs to serve employees better and achieve objectives. When it comes to lump-sum reimbursement, while assessing factors impacting relocation, there may be opportunities to pursue more customized, flexible reimbursement plans to meet the specific needs of employees without sacrificing employee productivity (ex: time lost working to house hunting, addressing child, elder, or spousal relocation, etc.).

## RECOMMENDATIONS

THE 55TH ANNUAL ATLAS® CORPORATE RELOCATION SURVEY

## The Industry's Longest-Running Survey

Every year since 1968, 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. If you would like to participate in next year's Corporate Relocation Survey, please email [research@leapagency.com](mailto:research@leapagency.com) to sign up.

Visit us at [atlasvanlines.com](http://atlasvanlines.com) or contact us at 800-638-9797.



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