

A. RELOCATION VOLUMES & BUDGETS

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| Of total sample: | 1) How many employees did your company relocate in 2014? |
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| | |
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| 0% | None |
| 20% | 1 - 9 |
| 0% | 10 - 19 |
| 20% | 20 - 49 |
| 20% | 50 - 99 |
| 13% | 100 - 199 |
| 7% | 200 - 399 |
| 20% | 400 or more |

50 - 99 Median

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| Of total sample: | 2) Do you ever relocate employees between countries? |
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| 80% | % of companies answering "Yes" |
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| Of total sample: | 3) Is your company... |
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| 0% | Regional |
| 20% | National |
| 80% | International |

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| Of total sample: | 4) Compared to 2013, did the number of employees you relocated in 2014... |
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| 40% | Increase |
| 53% | Stay About the Same |
| 7% | Decrease |

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| Of total sample: | 5) Compared to 2013, did your 2014 relocation budget... |
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| 47% | Increase |
| 53% | Stay About the Same |
| 0% | Decrease |

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| Of total sample: | 6) Compared to 2014, do you anticipate that the number of employees your company will relocate during 2015 will... |
|------------------|--|

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| 33% | Increase |
| 60% | Stay About the Same |
| 7% | Decrease |

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| Of total sample: | 7) Compared to 2014, do you anticipate that your relocation budget in 2015 will... |
| | 33% Increase 60% Stay About the Same 7% Decrease |

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| Of total sample: | 8) Did any employees decline the opportunity to relocate in 2014?* |
| | 75% % of companies answering "Yes" |
| | *excludes those who don't know |

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| Of total sample: | 9) Does declining the opportunity to relocate usually hinder an employee's career? |
| | 7% % of companies answering "Yes" |

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| Of total sample: | 10a) Did your company offer additional incentives or exceptions to encourage employee relocations over the past year? |
| | 73% % of companies indicating "Yes" |

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| Of those who offered incentives: (see Question 10a) | 10b) Which of the following additional incentives did your company offer to encourage employee relocations over the past year? |
| | <ul style="list-style-type: none"> 91% Extended temporary housing benefits 64% Cost-of-living-adjustments (COLAs) in salary at new location 55% Relocation bonuses 55% Extended duplicate housing benefits 45% Loss-on-sale protection 36% Guaranteed buyout option for origin home 27% Telecommuting option (one or two days each week) to curtail commuting costs 27% Buyer value option for origin home 18% Guarantee of employment contract (for specified length of time) if relocation accepted 18% Mortgage payoffs/loans (if property sale won't cover employee mortgage debt) 9% Other |

| | |
|---|---|
| Of those who offered incentives: (see Question 10a) | 10c) How often did offering the above incentives prove successful in convincing an employee to relocate?* |
| | <ul style="list-style-type: none"> 20% Almost always 70% Frequently 10% Seldom 0% Never |

*excludes not applicable/don't know responses

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Of total sample: 11) Did the number of employees declining relocation in 2014...*

- 0% Increase from the 2013 level
- 100% Remain about the same as the 2013 level
- 0% Decrease from the 2013 level

*excludes those who don't know

Of those who answered "Yes" to Question 8: 11a) What reasons did employees give for declining relocation?

- 89% Spouse's/partner's employment
- 78% Family issues/ties
- 44% Personal reasons (non-disclosed)
- 33% Housing/mortgage concerns
- 33% Cost of living in new location
- 22% No desire to relocate
- 0% Job security concerns
- 22% Other

12a) How many employees did your company relocate in 2014 in each of the following:

Of those relocating employees: (see Question 1) Within Canada

- 0% None
- 30% 1-9
- 0% 10-19
- 20% 20-49
- 10% 50-99
- 40% 100 or more
- 0% Don't know

Of those relocating employees: (see Question 1) Between the U.S. and Canada

- 33% None
- 27% 1-9
- 7% 10-19
- 33% 20-49
- 0% 50-99
- 0% 100 or more
- 0% Don't know

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| Of those relocating employees: (see Question 1) | Between Canada and Another Country |
|---|------------------------------------|
| | 40% None |
| | 20% 1-9 |
| | 0% 10-19 |
| | 30% 20-49 |
| | 0% 50-99 |
| | 10% 100 or more |
| | 0% Don't know |

| Of those relocating employees: (see Question 1) | Within a Single Foreign Country |
|---|---------------------------------|
| | 53% None |
| | 13% 1-9 |
| | 20% 10-19 |
| | 0% 20-49 |
| | 0% 50-99 |
| | 7% 100 or more |
| | 7% Don't know |

| Of those relocating employees: (see Question 1) | Between Two Foreign Countries |
|---|-------------------------------|
| | 53% None |
| | 13% 1-9 |
| | 13% 10-19 |
| | 13% 20-49 |
| | 0% 50-99 |
| | 7% 100 or more |
| | 0% Don't know |

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

| Of those relocating employees: (see Question 1) | Within Canada |
|---|-------------------------------|
| | 90% Ontario |
| | 40% Alberta |
| | 40% British Columbia |
| | 30% Saskatchewan |
| | 20% Manitoba |
| | 20% Newfoundland and Labrador |
| | 20% Quebec |
| | 20% Nova Scotia |

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- 20% New Brunswick
- 10% Yukon
- 10% Prince Edward Island
- 10% Nunavut
- 10% Northwest Territories

*excludes N/A responses.

Of those relocating employees: (see Question 1)

Between Canada and Another Country/Region*

- 67% United States
- 50% South America
- 50% Asia
- 33% United Kingdom
- 33% Central America/Caribbean
- 33% Europe (Western)
- 33% Canada
- 17% Australia/Pacific Rim
- 0% Africa (North)
- 0% Europe (Eastern)
- 0% Russia
- 0% Middle East
- 0% Africa (Sub-Saharan)
- 0% Other

*excludes N/A responses.

Of those relocating employees: (see Question 1)

Within a Single Foreign Country/Region*

- 57% United States
- 57% Canada
- 29% Europe (Western)
- 29% Asia
- 29% United Kingdom
- 29% South America
- 29% Central America/Caribbean
- 0% Europe (Eastern)
- 0% Middle East
- 0% Australia/Pacific Rim
- 0% Africa (Sub-Saharan)
- 0% Africa (North)
- 0% Russia
- 0% Other

*excludes N/A responses

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| | |
|---|--|
| Of those relocating employees: (see Question 1) | Between Two Foreign Countries/Regions* |
| | <ul style="list-style-type: none"> 57% United Kingdom 43% South America 43% Central America/Caribbean 29% Europe (Western) 29% United States 29% Asia 29% Canada 14% Australia/Pacific Rim 0% Europe (Eastern) 0% Middle East 0% Russia 0% Africa (North) 0% Africa (Sub-Saharan) 0% Other |

*excludes N/A responses

B. FACTORS IMPACTING RELOCATIONS

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| Of total sample: | 13) What external factors had the most significant impact on the number of your employee relocations in 2014? |
| | <ul style="list-style-type: none"> 20% External conditions had no impact 60% Lack of qualified people locally 33% Growth of international competition 27% Economic conditions 27% Political/regulatory environment – domestic or international (i.e. employment legislation/policies) 7% Real estate market 0% Growth of domestic competition 0% Affordable Care Act/U.S. health care legislation requirements/implementation 0% Natural/man-made disasters – domestic or international (i.e. hurricanes, earthquakes, system failures (oil/nuclear/other), etc.) 0% Other |

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| Of total sample: | 14) What internal company conditions had the most significant impact on the number of your employee relocations in 2014? |
| | <ul style="list-style-type: none"> 13% Internal conditions had no impact 67% Growth of company 67% Knowledge/skills transfers 40% Promotions/resignations 33% Expansion into new territories |

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- 27% International expansion
- 27% Closing of facility
- 20% Corporate reorganization/restructuring
- 20% Budget constraints
- 20% Acquisitions/mergers
- 20% Use of short-term assignments
- 7% Expansion of facility
- 7% Increased production
- 7% Use of frequent business travel/telecommuting
- 0% Technology deployment/integration
- 0% Other

15) Compared to 2013, from your company's perspective, please rate the following in 2014:

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|------------------|--|
| Of total sample: | Your company's overall financial performance |
| | 75% Better than 2013 |
| | 8% Same as in 2013 |
| | 17% Worse than 2013 |

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| Of total sample: | Emerging global market economies |
| | 90% Better than 2013 |
| | 0% Same as in 2013 |
| | 10% Worse than 2013 |

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| Of total sample: | Developed global market economies |
| | 80% Better than 2013 |
| | 10% Same as in 2013 |
| | 10% Worse than 2013 |

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| Of total sample: | Canadian economy |
| | 71% Better than 2013 |
| | 29% Same as in 2013 |
| | 0% Worse than 2013 |

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|------------------|-----------------------------|
| Of total sample: | Canadian real estate market |
| | 67% Better than 2013 |
| | 33% Same as in 2013 |
| | 0% Worse than 2013 |

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16) Compared to 2014, please indicate what you anticipate for 2015:

Of total sample: Your company's overall financial performance

67% Better than 2014
25% Same as in 2014
8% Worse than 2014

Of total sample: Emerging global market economies

60% Better than 2014
30% Same as in 2014
10% Worse than 2014

Of total sample: Developed global market economies

70% Better than 2014
20% Same as in 2014
10% Worse than 2014

Of total sample: Canadian economy

57% Better than 2014
29% Same as in 2014
14% Worse than 2014

Of total sample: Canadian real estate market

33% Better than 2014
33% Same as in 2014
33% Worse than 2014

C. POLICY ADMINISTRATION

Of total sample: 17) Does your company have a formal policy for the following?

87% Domestic Relocations
60% Short-Term/Temporary Assignments
40% Extended Business Travel
20% Long-Distance Commuter

% of companies answering "Yes"

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| | |
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| Of total sample: | 18a) Does your company have different tiers (or levels) within its domestic relocation policy? |
| | <ul style="list-style-type: none"> 43% No tiers or levels/single policy 29% Two tiers 14% Three tiers 7% Four tiers 7% Five tiers or more |

2.1 Average Number of Domestic Tiers (of companies with tiers/levels)

| | |
|--|---|
| Of those with Domestic tiers/levels (see Question 18a): | 18b) What are your different tiers (or levels) based on? |
| | <ul style="list-style-type: none"> 50% Job or Grade Level (i.e. staff, management, professional, etc.) 38% Homeowner/Renter Status 25% New Hire/Current Employee Status 25% Company vs. Employee Initiated Relocation 13% Position/Job Title 0% Other |

| | |
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| Of total sample: | Q19a) Does your relocation policy utilize aspects of core coverage/flex policy? |
| | 80% % of companies indicating "Yes" |

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| Of those using "core coverage/flex policy" elements (see Question 19a) | Q19b) Which of the following aspects of core coverage/flex policy does your relocation policy incorporate? |
| | <ul style="list-style-type: none"> 50% Relocation benefit coverage of specific items (i.e. core components) across all employee levels/categories 33% Relocation benefit coverage of specific items (i.e. core components) dependent on employee levels/categories 25% Flexible use of a portion of relocation benefit coverage (all employees) 8% Flexible use of full relocation benefit coverage amount (all employees) 8% Flexible use of full relocation benefit coverage amount (dependent on employee level/category) 8% Flexible use of a portion of relocation benefit coverage (dependent on employee level/category) 0% Other |

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| Of total sample: | 20a) Does your company have a centralized relocation department? 87% % of companies indicating "Yes" |
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| Of those with a centralized relocation department: (see Question 20a) | 20b) Does your company's centralized relocation department...* |
|---|--|

- 100% Develop relocation policy
- 85% Manage domestic relocation programs
- 77% Manage international relocation programs
- 69% Control household goods carrier selection
- 62% Control additional relocation services provider(s) selection
- 31% Impact talent management/recruitment decisions/processes
- 31% Control freight carrier selection (air, land, sea or rail)
- 23% Handle air travel via commercial airlines
- 8% Handle office relocations

*excludes those who don't know

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| Of total sample: | 21) Did your company use any of the following cost containment measures in relocation policy/practice over the past year? |
|------------------|---|

- 53% No cost containment measures beyond typical relocation policy or program utilized
- 33% Cap relocation benefit amounts
- 20% Restructure policy tiers/eligibility for certain benefits (i.e. add/reduce/redefine tiers, implement core/flex, etc.)
- 20% Limit miscellaneous allowance benefits (coverage items, amounts)
- 20% Modify COLA offering policy
- 13% Review/renegotiate supplier contracts
- 7% Offer pre-decision counseling
- 7% Tighten real estate assistance requirements
- 0% Offer short-term/extended travel/commuter arrangements rather than relocate employees
- 0% Incentivize renting rather than home purchase at destination
- 0% Other

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| Of total sample: | 22) How many salaried (non-hourly) people are employed by your company? |
|------------------|---|

- 27% Less than 500
- 13% 500 - 4,999
- 60% 5,000 or more

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Of total sample: | 23) In 2014, what approximate percentage of your company's relocating employees were (at origin):

- 56% Transferees
- 44% New Hires
- 57% Homeowners
- 43% Renters
- 0% N/A (Neither Homeowners/Renters)

*excludes those who don't know

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

Of total sample: | a) Accept a relocation offer*

- 20% 1 week or less
- 80% Up to 2 weeks
- 0% Up to 3 weeks
- 0% Up to 1 month
- 0% Up to 2 months
- 0% Up to 3 months
- 0% More than 3 months

*excludes those who don't know

Of total sample: | b) Report to work at the new location*

- 0% 1 week or less
- 0% Up to 2 weeks
- 0% Up to 3 weeks
- 14% Up to 1 month
- 57% Up to 2 months
- 29% Up to 3 months
- 0% More than 3 months

*excludes those who don't know

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

Of total sample: | (Average Shown)

- 1.0 Expense-paid house-hunting TRIPS with SPOUSE/PARTNER to the new location
- 4.9 Expense-paid DAYS for EMPLOYEES to use for house-hunting trips (total amount allowed)

*excludes those who don't know

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| Of total sample: | <p>26) How was the Internet used for relocation-related matters in 2014?</p> <ul style="list-style-type: none"> 7% Did not use the Internet for relocation-related matters in 2014 93% Communicate via e-mail with relocating employees 67% Research relocation-related matters (policy, benchmarking, etc.) 67% Initiate/execute employee relocation services 67% Access relocation company website for reporting or other services 60% Complete online forms for employee relocation 47% Research relocation service providers 27% Utilize social media/networking tools 27% Utilize mobile applications from relocation providers 13% Audit/verify prices quoted for relocation services 7% Other |
|------------------|---|

| | |
|------------------|--|
| Of total sample: | <p>27) Is your company utilizing "alternative assignments" (i.e. extended business travel, cross-border commuting, localization, permanent international transfers, rotators, etc.)?</p> <ul style="list-style-type: none"> 40% No, and we do not plan to do so 40% Yes, internationally (limited basis) 20% Yes, domestically (limited basis) 7% Yes, internationally (frequently) 7% Yes, domestically (frequently) 7% No, but we plan to do so in the coming year 7% Other |
|------------------|--|

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| Of those utilizing "alternative assignments": (see Question 27) | <p>27a) How are these "alternative assignment" arrangements incorporated into your organization's overall employee mobility strategy?</p> <ul style="list-style-type: none"> 89% Used to meet strategic business goals 67% Used to accommodate employee needs 67% Used to develop internal talent 56% Used in addition to traditional short-term assignment arrangements 33% Used to maximize budget/corporate resources 22% Used in place of long-term assignments 22% Used in addition to long-term assignments 11% Used in place of traditional short-term assignment arrangements 0% Other |
|---|---|

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| Of those utilizing "alternative assignments": (see Question 27) | 27b) What are the key factors that determine if an "alternative assignment" method will be used? |
| | <ul style="list-style-type: none"> 78% Assignment purpose 67% Job function 56% Employee requests 44% Cost 44% Career development 22% Other |

D. RELOCATION COSTS

| | |
|------------------|---|
| Of total sample: | 28) For relocating employees (transferees OR new hires), does your company reimburse/pay to... |
| | <ul style="list-style-type: none"> 7% Company does not pay for any of these items or only offers lump sum 93% Move an automobile 93% Pack all items 80% Unpack all items 60% Move exercise equipment 60% Move a second automobile 47% Move collections of highly valuable objects like statuary, paintings, antiques 47% Move pets 40% Move via containerized shipment 40% Move unlimited weight 40% Move recreation and lawn equipment 40% Carry items down from the attic 40% Move a boat 33% Partial/custom unpacking of items 27% Have permanent/extended storage of some possessions 20% Have belongings picked up from a secondary residence (summer home, relative's home, etc.) |

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|------------------|---|
| Of total sample: | 29) When a relocating employee (transferee OR new hire) is a homeowner who will be buying (not renting), does your company... |
|------------------|---|

- 13% Company does not offer any of these benefits or only offers lump sum
- 67% Offer homefinding trips
- 67% Offer duplicate housing assistance
- 60% Offer temporary housing allowance
- 60% Reimburse/pay for home sale costs
- 60% Reimburse/pay for home purchase costs
- 47% Offer storage
- 47% Offer mortgage subsidy or allowance
- 47% Offer guaranteed buyout/appraised value option for origin home
- 40% Offer home marketing assistance
- 40% Reimburse/pay for loss-on-sale
- 27% Offer qualified home sale program
- 20% Offer buyer value option for origin home
- 13% Offer bonuses/incentives for employee-generated home-sale
- 0% Reimburse/pay for federal tax liability

| | |
|------------------|--|
| Of total sample: | 30) When a relocating employee (transferee OR new hire) will be renting (not buying), does your company... |
|------------------|--|

- 7% Company does not offer any of these benefits or only offers lump sum
- 87% Reimburse/pay for lease cancellation
- 73% Offer temporary housing allowance
- 67% Offer homefinding trips
- 53% Reimburse/pay apartment search or finder's fees
- 40% Offer storage
- 27% Offer rental subsidy or allowance
- 20% Reimburse/pay for hook-up fees
- 13% Reimburse/pay for security deposits
- 13% Apply temporary living allowance toward rent
- 13% Reimburse/pay for furniture rental

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

| | |
|------------------|-------------|
| Of total sample: | Transferees |
|------------------|-------------|

- 93% Full reimbursement of relocation expenses
- 50% Lump sum payment
- 29% Partial reimbursement based on salary, position, policy tier, etc.
- 0% No reimbursement of relocation expenses

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| | |
|------------------|--|
| Of total sample: | New Hires |
| | 57% Full reimbursement of relocation expenses |
| | 36% Lump sum payment |
| | 50% Partial reimbursement based on salary, position, policy tier, etc. |
| | 0% No reimbursement of relocation expenses |

| | |
|------------------|---|
| Of total sample: | 32) What approximate percentage of your relocations were: |
| | 77% Fully reimbursed/cost covered by company |
| | 14% Lump sum payment only (entire relo) |
| | 8% Partially reimbursed by company |
| | 1% Not reimbursed (employee paid) |

| | |
|--|---|
| Of those offering lump sum payments (see Question 32): | 32a) For what types of relocation costs are lump sum payments typically offered to relocating employees (transferees OR new hires)? |
| | 63% Miscellaneous allowances |
| | 50% Travel expenses (i.e. housing hunting trips, final move, etc.) |
| | 38% Temporary housing |
| | 13% Entire relocation cost |
| | 13% Rental assistance/transactions |
| | 0% Household goods shipping/storage |
| | 0% Real estate assistance/transactions |
| | 0% Other |

| | |
|--|--|
| Of those offering lump sum payments (see Question 32): | 32b) What types of relocating employees most commonly receive lump sum payments? |
| | 63% Transferees |
| | 63% New hires |
| | 50% Executives |
| | 38% Entry level employees |
| | 25% Experienced professionals |
| | 25% Homeowners |
| | 13% Renters |
| | 13% Other |

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

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| Of those offering lump sum payments (see Question 32): | Real estate assistance/transactions |
|--|-------------------------------------|

- 60% No lump sum offered for this benefit
- 0% less than \$5,000
- 0% \$5,000-\$9,999
- 20% \$10,000 or more
- 20% Don't know

| | |
|--|----------------------------------|
| Of those offering lump sum payments (see Question 32): | Household goods shipping/storage |
|--|----------------------------------|

- 50% No lump sum offered for this benefit
- 17% less than \$5,000
- 0% \$5,000-\$9,999
- 17% \$10,000 or more
- 17% Don't know

| | |
|--|------------------------|
| Of those offering lump sum payments (see Question 32): | Entire relocation cost |
|--|------------------------|

- 25% No lump sum offered for this benefit
- 50% less than \$5,000
- 0% \$5,000-\$9,999
- 25% \$10,000 or more
- 0% Don't know

| | |
|--|--------------------------------|
| Of those offering lump sum payments (see Question 32): | Rental assistance/transactions |
|--|--------------------------------|

- 75% No lump sum offered for this benefit
- 25% less than \$2,500
- 0% \$2,500-\$4,999
- 0% \$5,000 or more
- 0% Don't know

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| | |
|--|--|
| Of those offering lump sum payments (see Question 32): | Travel expenses |
| | 60% No lump sum offered for this benefit |
| | 40% less than \$2,500 |
| | 0% \$2,500-\$4,999 |
| | 0% \$5,000 or more |
| | 0% Don't know |

| | |
|--|--|
| Of those offering lump sum payments (see Question 32): | Temporary housing |
| | 60% No lump sum offered for this benefit |
| | 40% less than \$2,500 |
| | 0% \$2,500-\$4,999 |
| | 0% \$5,000 or more |
| | 0% Don't know |

| | |
|--|--|
| Of those offering lump sum payments (see Question 32): | Miscellaneous allowances |
| | 67% No lump sum offered for this benefit |
| | 0% less than \$2,500 |
| | 17% \$2,500-\$4,999 |
| | 17% \$5,000 or more |
| | 0% Don't know |

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

| | |
|--|------------------------------------|
| Of those offering lump sum payments (see Question 32): | Performed by: |
| | 38% Relocation team staff member |
| | 38% Outsourced |
| | 25% Human Resources staff member |
| | 25% Finance/procurement department |
| | 0% Relocating employee |
| | 13% Other |
| | 0% Not Tracked |

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Of those offering lump sum payments (see Question 32):

Method:

- 63% Submission of expense reports
- 38% Outsourced
- 25% Excel spreadsheet
- 13% In-house software report
- 0% Online reporting tool
- 0% Other
- 0% Not Tracked

E. EMPLOYEE, SPOUSE & ASSISTANCE ISSUES

Of total sample: 33) What is the age range of your most frequently relocated salaried employee?*

- 8% Less than 30 years
- 31% 30 – 35 years
- 23% 36 – 40 years
- 31% 41 – 45 years
- 8% More than 45 years

*excludes those who don't know

Of total sample: 34) Does your organization perform candidate assessments prior to relocation offers?

- 47% No, candidate assessments are not performed
- 20% Yes, for all relocations
- 13% Yes, for international relocations
- 13% Yes, for new hires
- 7% Yes, for domestic relocations
- 7% Yes, on an "as needed/requested" basis
- 7% Yes, for transferees
- 0% Yes, based on policy tier/reimbursement level
- 7% Other

(Average Percent)

Of total sample: 35) In 2014, what approximate percentage of your relocations involved:*

- 36% a) Female employees
- 41% b) Wife/female partner (Trailing spouse)
- 23% c) Husband/male partner (Trailing spouse)
- 36% d) Employees with children

*excludes those who don't know

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|------------------|--|
| Of total sample: | 36) What assistance does your company provide to the relocating employee for elder care? |
| | 60% No elder care assistance |
| | 20% Provide paid personal leave days |
| | 20% Provide list of nursing homes and/or day-care centers |
| | 13% Allow flexible scheduling or telecommuting |
| | 0% Allow employee to use pre-tax dollars for outside care |
| | 0% Relocate an elderly relative that does not live with the employee currently, but will either live with the employee at the new location or at a nearby residence/facility |
| | 7% Other |

| | |
|------------------|---|
| Of total sample: | 37) What assistance does your company provide to the relocating employee for childcare? |
| | 33% No childcare assistance |
| | 47% Provide list of childcare providers/services and/or agencies |
| | 40% Provide list of local schools/educational options |
| | 20% Allow flexible scheduling or telecommuting |
| | 20% Provide paid personal leave days |
| | 7% Allow employee to use pre-tax dollars for outside care |
| | 7% Other |

| | |
|------------------|--|
| Of total sample: | 38) How frequently is an employee's relocation affected by the employment status of that employee's spouse/partner?* |
| | 9% Almost always |
| | 36% Frequently |
| | 55% Seldom |
| | 0% Never |

*excludes those who don't know

| | |
|------------------|--|
| Of total sample: | 39) Does your company allow the hiring of spouses of employees?* |
| | 64% Yes, but not in the same department/division |
| | 29% Yes, without restriction |
| | 0% Yes, but not at the same location |
| | 7% No |

*excludes those who don't know

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| | |
|------------------|---|
| Of total sample: | 39a) Does your company assist an employee's spouse or partner in finding employment in the new location? 80% % of companies indicating "Yes" |
|------------------|---|

| | |
|--|---|
| Of those who did not answer "No assistance" to Question 39a: | 39b) How does your company assist an employee's spouse or partner in finding employment in the new location? 42% Provide networking assistance 42% Provide resume preparation assistance 42% Pay for outplacement/career services from an outside firm 33% Find employment within company 33% Provide interviewing skills training 33% Find employment outside company 50% Other |
|--|---|

| | |
|--|--|
| Of those who did not answer "No assistance" to Question 39a: | 39c) What approximate percentage of relocated employees with a spouse or partner used this employment assistance?* |
|--|--|

21% Average Percent

*excludes those who don't know

F. SUPPLIER MANAGEMENT

| | |
|------------------|---|
| Of total sample: | 40) Which of the following services did your company outsource to a relocation service, HRO or brokerage firm in 2014? 27% Did not use a relocation service, HRO or brokerage firm in 2014 53% Real estate purchase 47% Real estate sales/marketing 47% Contract of household goods carrier 47% Orientation tours at new location 40% Counseling about the planning & details of relocation 40% Arrangement of family's transportation and accommodations 40% Expense tracking/reimbursement services 40% Assistance with employee claims preparation and submission 40% Property management 33% Monitoring of shipment 33% Counseling about company policy 33% Audit and/or payment of invoice 27% Management of full relocation program 27% Compensation services (i.e. payroll arrangements, tax compliance, etc.) 20% Tax gross-up assistance 13% Supplementary services (appliances, cleaning, etc.) 13% Other |
|------------------|---|

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| | |
|--|--|
| Of those where company outsourced: (see Question 40) | 40a) Which department(s) at your company select a relocation service, HRO or brokerage firm? |
|--|--|

- 75% Human resources
- 50% Relocation
- 33% Procurement
- 25% Executive management
- 0% Other

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

| | |
|------------------|-------------|
| Of total sample: | Transferees |
|------------------|-------------|

- 100% Paid directly by the company
- 7% Paid by the employee and then reimbursed
- 0% Paid by the employee and not reimbursed

| | |
|------------------|-----------|
| Of total sample: | New Hires |
|------------------|-----------|

- 92% Paid directly by the company
- 23% Paid by the employee and then reimbursed
- 0% Paid by the employee and not reimbursed

| | |
|------------------|---|
| Of total sample: | 42) Who selects the household goods carrier for your employee's relocation? |
|------------------|---|

- 53% The company
- 33% A relocation firm
- 13% The company & employee together
- 0% The employee
- 0% Other

| | |
|--|---|
| Of those where company is involved in selection: (see Question 42) | 42a) Which department(s) at your company select the household goods carrier for your employee's relocation? |
|--|---|

- 60% Human resources
- 50% Relocation
- 30% Procurement
- 10% Executive management
- 0% Other

G. INTERNATIONAL

| | |
|--|--|
| Of those who answered "Yes" to Question 2: | 43a) Compared to 2013, did the number of employees your company relocated internationally during 2014... |
|--|--|

- 50% Increase
- 42% Stay About the Same
- 8% Decrease

| | |
|--|--|
| Of those who answered "Yes" to Question 2: | 43b) Compared to 2014, do you anticipate that the number of employees your company will relocate internationally during 2015 will... |
|--|--|

- 42% Increase
- 50% Stay About the Same
- 8% Decrease

| | |
|--|--|
| Of those who answered "Yes" to Question 2: | 43c) What is the typical international relocation assignment duration for employees at your company? |
|--|--|

- 0% Less than 3 months
- 8% 4 to 12 months
- 42% Greater than 12 months, but less than 3 years
- 50% 3 years or more

43d) In 2014, what approximate percentage of your international relocations were:*

| | |
|--|-------------------|
| Of those who answered "Yes" to Question 2: | (Average Percent) |
|--|-------------------|

- 54% Traditional long-term assignments
- 12% Short-term/temporary assignments (less than 12 months)
- 37% Permanent transfers
- 2% Other assignment type (commuter, etc)
- 1% Lump sum payment only

*excludes those who don't know

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| | |
|---|---|
| Of those who answered "Yes" to Question 2: | 43e) Compared to 2014, do you expect the number of international short-term/temporary assignments (less than 12 months) in 2015 to... |
| <p>33% Increase 58% Stay About the Same 8% Decrease</p> | |

| | |
|--|---|
| Of those who answered "Yes" to Question 2: | 43f) Does your company have a formal policy for the following? (International Policies) |
| <p>83% International Relocations (traditional length 1-3 years) 83% Permanent Transfers (international) 50% Localization (international)</p> <p>% of companies answering "Yes"</p> | |

| | |
|---|---|
| Of those who answered "Yes" to Question 2: | 43g) Does your company have different tiers (or levels) within its international relocation policy? |
| <p>64% No tiers or levels/single policy 9% Two tiers 9% Three tiers 9% Four tiers 9% Five tiers or more</p> | |

1.9 Average Number of International Tiers (of companies w/ tiers/levels)

| | |
|--|--|
| Of those with International tiers/levels (see Question 43g): | 43h) What are your different tiers (or levels) based on? |
| <p>50% Job or Grade Level (i.e. staff, management, professional, etc.) 50% Homeowner/Renter Status 25% Position/Job Title 25% New Hire/Current Employee Status 25% Company vs. Employee Initiated Relocation 0% Other</p> | |

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| | |
|--|--|
| Of those who answered "Yes" to Question 2: | 43i) Comparing your international relocation policy to your domestic relocation policy, does your company's international relocation policy offer... |
|--|--|

- 25% No difference between international and domestic relocation policies
- 67% Additional tax considerations
- 58% Allowances for children to attend certain schools
- 50% Intercultural and language training
- 42% Additional leave time that includes at least one visit back to the employee's home country
- 42% Higher relocation allowances
- 33% Financial services assistance (i.e. bank account setup, specialized compensation arrangements)
- 33% Increased allowances for permanent storage
- 25% Higher rental housing allowance
- 17% Security support program
- 8% Additional leave time
- 0% Extended per diem charges
- 17% Other

| | |
|--|---|
| Of those who answered "Yes" to Question 2: | 43j) Which of the following international services did your company outsource to a relocation service, HRO or brokerage firm in 2014? |
|--|---|

- 25% Did not use a relocation service, HRO or brokerage firm for international relocation services in 2014
- 58% Destination services/orientation tours in host country
- 50% Contract of household goods carrier for international shipping
- 50% Monitoring of international shipment
- 50% Visa & immigration services
- 50% Securing rental property in host country
- 50% Repatriation services
- 50% Arrangement of family's temporary accommodations
- 42% Counseling about the planning & details of relocating internationally
- 42% Counseling about company policy concerning international relocation
- 42% Compensation services (i.e. payroll arrangements, tax compliance, etc.)
- 42% Property management of home at origin
- 33% Management of international relocation program
- 33% Intercultural and language training
- 33% Arrangement of family's international transportation
- 33% International real estate (sales/marketing and/or purchases)
- 8% Other

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| | |
|--|--|
| Of those who answered "Yes" to Question 2: | 43k) How does your company assist an internationally relocated employee's spouse or partner in finding employment in the new location? |
|--|--|

- 25% No assistance
- 42% Pay for work visa in new location
- 33% Provide networking assistance
- 33% Pay for outplacement/career services from an outside firm
- 25% Provide resume preparation assistance
- 25% Provide interviewing skills training
- 17% Find employment within company
- 17% Find employment outside company
- 33% Other

| | |
|--|---|
| Of those who answered "Yes" to Question 2: | 43l) In 2014, what reasons were cited for an employee declining an international relocation or for an international relocation to fail? |
|--|---|

- 25% No international relocations declined or failed
- 42% Family issues/ties
- 42% Personal reason (non-disclosed)
- 33% Lack of adaptability by the spouse/partner
- 17% Lack of adaptability by employee
- 8% Financial issues/concerns
- 8% Lack of spousal/partner assistance
- 8% War/terrorism
- 0% Illness
- 8% Other
- 8% Don't know

H. CORPORATE/RESPONDENT PROFILE

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|------------------|--|
| Of total sample: | 44) Which one of the following most accurately describes your company's business classification? |
|------------------|--|

- 27% Manufacturing/processing
- 27% Financial (includes banking, insurance, investments, etc.)
- 20% Service (Profit) (includes educational services, healthcare, high-tech, etc.)
- 7% Wholesale/Retail
- 7% Government/military
- 0% Service (Non-profit) (includes religious institutions, charities, etc.)
- 13% Other

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Of total sample: 45) What were your company's annual sales for 2014?

- 0% Less than \$25 million
- 23% \$26 - \$50 million
- 0% \$51 - \$99 million
- 0% \$100 - \$249 million
- 0% \$250 - \$499 million
- 0% \$500 - \$749 million
- 8% \$750 million - \$1 billion
- 69% Over \$1 billion

*excludes blank responses

Of total sample: 46) What is your department's function?

- 47% Human Resources/Personnel - Compensation & Benefits
- 27% Relocation/Mobility Services
- 13% Human Resources/Personnel - General/Administration
- 13% Human Resources/Personnel - Talent Management
- 0% Finance/Accounting
- 0% Shared Services/Procurement/Purchasing
- 0% Other (please specify)

Of total sample: 47) What is your position within the company?

- 0% President
- 0% Vice President
- 7% Director
- 40% Manager
- 7% Relocation Administrator
- 13% Supervisor
- 7% Coordinator
- 0% HR Assistant
- 7% Recruiter
- 20% Other

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| | |
|------------------|--|
| Of total sample: | 48) Which of the following trade publication(s) do you regularly read? |
| | <ul style="list-style-type: none"> 13% None 47% Perspectives 33% HR Magazine 33% Mobility 20% HR News 20% Workforce 20% HR Reporter 13% Employee Benefits News 13% Runzheimer Reports on Relocation 7% Human Resource Executive 7% Human Resources Outsourcing (HRO) Today 7% The Relocation Report 0% National Relocation & Real Estate 7% Other(s) |

| | |
|------------------|---|
| Of total sample: | 49) To what relocation-related associations do you currently belong? |
| | <ul style="list-style-type: none"> 13% None 67% Canadian Employee Relocation Council (CERC – Canada) 33% Human Resources Professionals Association (HRPA) 13% Worldwide ERC (formerly Employee Relocation Council - ERC) 7% Society of Human Resource Management (SHRM) 7% Regional or local relocation council 7% Forum for Expatriate Management 0% National Foreign Trade Council (NFTC) 13% Other(s) |