



2018 Annual Relocating Employee Survey

- ▶ Top Rated Independent Carrier
- ▶ Highest Average Quality Score

Plus Industry and Company Updates



* Twenty-fourth Annual Nationwide Relocating Employee Survey perform by Trippel Survey & Research, LLC.



Twenty-fourth Annual Nationwide Relocating Employee Survey Trippel Survey & Research

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Twenty-fourth Annual
Nationwide Relocating Employee Survey®
Results for 2018

Prepared by:
Trippel Survey & Research, LLC
July 2018

BACKGROUND INFORMATION

The 24th annual *Nationwide Relocating Employee Survey* © was conducted throughout a six month period ending June 30, 2018. The overall purpose of this annual survey is to collect and report objective, unbiased evaluations from transferees or assignees moving within the USA regarding their level of satisfaction with various relocation service providers.

The *Nationwide Relocating Employee Survey* © obtains evaluations from U.S. domestic relocated employees (transfers or assignments) via telephone or the Internet. The data is collected from (a) relocated employees among clients of Trippel Survey & Research, LLC as part of the ongoing survey relationships, and (b) one-time, no-cost employee surveys conducted for corporate relocation managers primarily for the purpose of this annual research.

A standard set of questions is asked of all transferees/assignees regarding satisfaction with each of the suppliers used in the individual's transfer/assignment. The core question is "Evaluate your overall level of service satisfaction with [supplier's name] performance?" A ten-point scale is used where 10 is the highest score of satisfaction, 1 is the lowest score.

The sampling population provided by corporate managers does not distinguish between homeowner or renter, permanent transfer versus domestic assignment, the nature of relocation benefits provided to the individual (i.e. full range of benefits versus limited "lump sum only" benefit package) or demographic consideration.

Supplier performance is evaluated using two metrics: average score and net satisfaction. Average satisfaction is a mean score not weighted by sample size. Net satisfaction is a measurement commonly used in qualitative surveys measuring the difference between the two top percentages of 10 or 9 and bottom six percentages of 1 through 6. The range can be 100% (all evaluations are 9 or 10) to -100% (all evaluations are 1 through 6)

Many corporations, as part of an ongoing survey relationship with Trippel Survey & Research LLC, request additional questions of their employees. The responses to those company-specific questions are confidential to those companies and not included in this report. Companies participating in the one-time special survey engagement also provided company-specific questions for which only they receive the responses. This report contains the evaluations to generic questions covering six categories: household goods services, relocation management services, mortgage services, corporate temporary housing services, spouse-partner services and destination-rental services.

The survey period accumulated opinions from 6,983 transferees representing 103 corporations or non-profit organizations. The total transferee participation rate is slightly higher than the 2017 survey with more corporations participating and providing more customer names or emails for surveying. There is a small margin of sampling error in all service categories for many suppliers due to low sample size.

CONFIDENTIALITY

The report and information therein is the property of Trippel Survey & Research, LLC. Budd Van Line (Budd) purchased a marketing license permitting Budd use of the data and report for internal and external marketing and communication to prospects and clients for a period of one year within the terms and conditions of the marketing license.

All material contained herein is copyright © 2018 by Trippel Survey & Research, LLC. All Rights Reserved. Corporate relocation managers or service providers may purchase a copy of the report by submitting a written request to Trippel Survey & Research, LLC at alantrippel@att.net or calling 501-922-4000

Update on Load it Once

The patented modular system for executive shipments continues to exceed expectations:

800+ Load it Once moves in 2018

98% Claims Free

Double the shipment capacity in the peak season

Customers love the security

Drivers better adhere to hours of service rules

Customer satisfaction rates above 98%...

All because we just Load it Once!



The regional fleet arrived in June. 14 foot containers for smaller shipments will hit the marketplace in 2019. The LiO national fleet continues to grow.



Overview

Load it Once (LiO) was invented and developed by our CEO David W. Budd. We hold the Patent on the product and are the only van line in America with this modular system.

LiO eliminates all the handling required in the traditional way of storing goods. Items are loaded on to the containers at a residence and not touched again until they deliver to the new home.

Visit the below website to see Load it Once in action:

<https://vimeo.com/247552823>

EXECUTIVE SUMMARY

1. 6,983 transferee or assignee evaluations were accumulated for this survey. There was a higher percentage of renters this year than any past year.
2. Analysis of the data indicates the following.
 - a. Renters are slightly less satisfied than homeowners with service providers' performance. The exception is when the renter obtains "rental services."
 - b. Transferees provided a lump sum with limited supplier-provided services are equally satisfied with their transfer experience versus transferees provided an assortment of supplier-provided services.
 - c. All 6 relocation service categories are providing generally satisfying services.
3. Among the 6 relocation categories, only the spouse-partner-family services category realized higher evaluations compared to last year.
4. In the Household Goods category (alphabetical order) Arpin Van Lines, Atlas Van Lines, Budd Van Lines and United Van Lines earned the highest evaluations. A very small margin differentiated these service providers.
5. In the Relocation Management Services category a number of service providers earned noteworthy end-user evaluations. These service firms in alphabetical order are Altair Global Relocation, Cornerstone Relocation Group, NEI Global Relocation, Plus Relocation Services and Weichert Workforce Mobility.
6. In the Relocation Mortgage category Premia Relocation Mortgage, Quicken Loans, U.S. Bank and Wells Fargo Home Mortgage earned category high transferee evaluations.
7. In the Corporate Temporary Housing category three service firms, among the different segments noted, stand out: National Corporate Housing, Nomad Temporary Housing and SuiteAmerica.
8. In Spouse-Partner Support services transferees gave the highest scores to IMPACT Group.
9. In Destination-Rental services, PorchLight Rental & Destination Services earned the highest customer evaluations.



The Eco-Crate System

Overview:

Designed and started in 2011, Budd's Eco-Crate System continues to grow and offer cost savings and sustainability solutions to our customers. The custom designed corrugated crates protect fragile and high value goods without the need to build wood crates.

Visit the website below to see an overview of the Eco-Crate

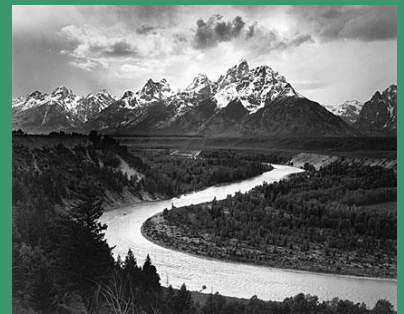
<https://vimeo.com/261127483/07e7763601>

Client Savings since inception:

\$3,100,000.00

99.9% Claim free handling

High value artwork shipped safely including works by Picasso and Ansel Adams



165 Tons of corrugated material saved per year



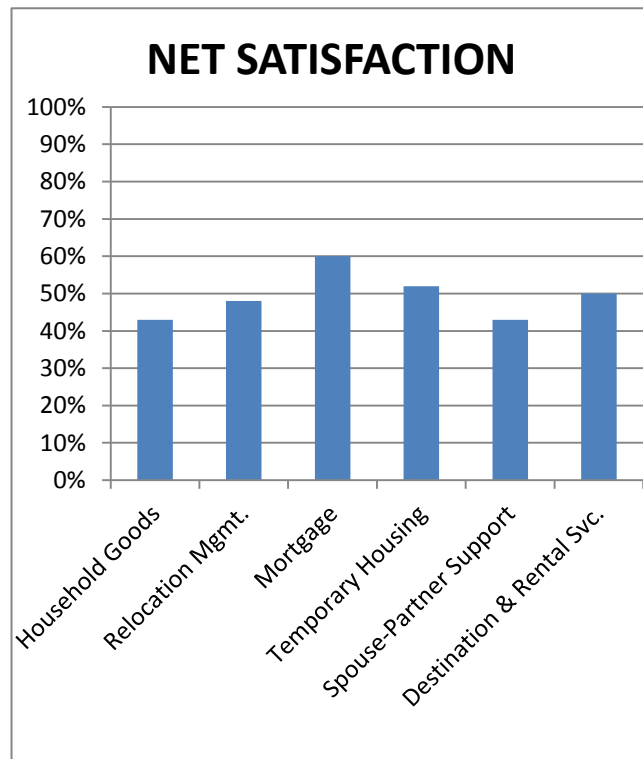
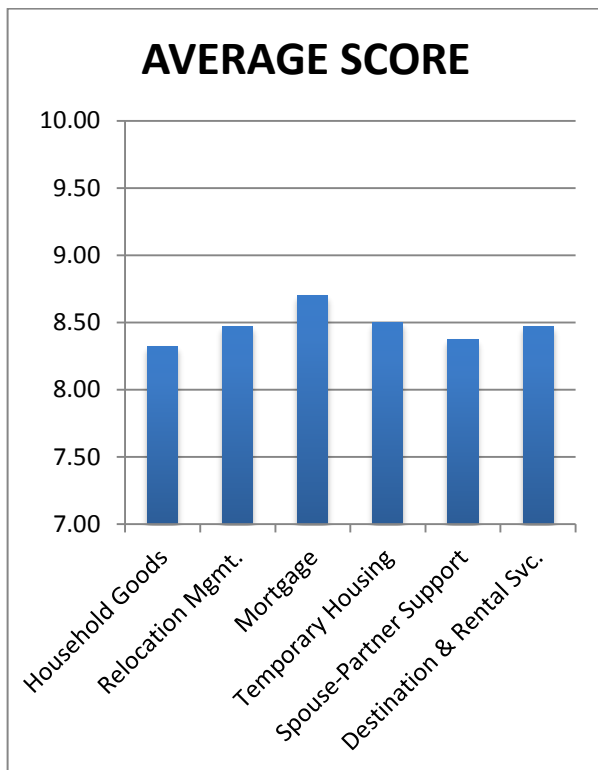
SURVEY RESULTS – INDUSTRIES’ OVERVIEW

TRANSFeree & ASSIGNEE SATISFACTION

The following chart shows the six surveyed relocation service categories, the number of evaluations received, average score and the percentage of top block, bottom block and the net satisfaction.

Industry	Number Evaluations	Average Score	Top Block	Bottom Block	Net Satisfaction
Household Goods	6774	8.32	46%	3%	43%
Relocation Mgmt.	5961	8.48	49%	1%	48%
Mortgage	3596	8.70	61%	1%	60%
Temporary Housing	6064	8.50	54%	2%	52%
Spouse-Partner Support	773	8.37	45%	2%	43%
Destination & Rental Svc.	974	8.47	2%	2%	50%

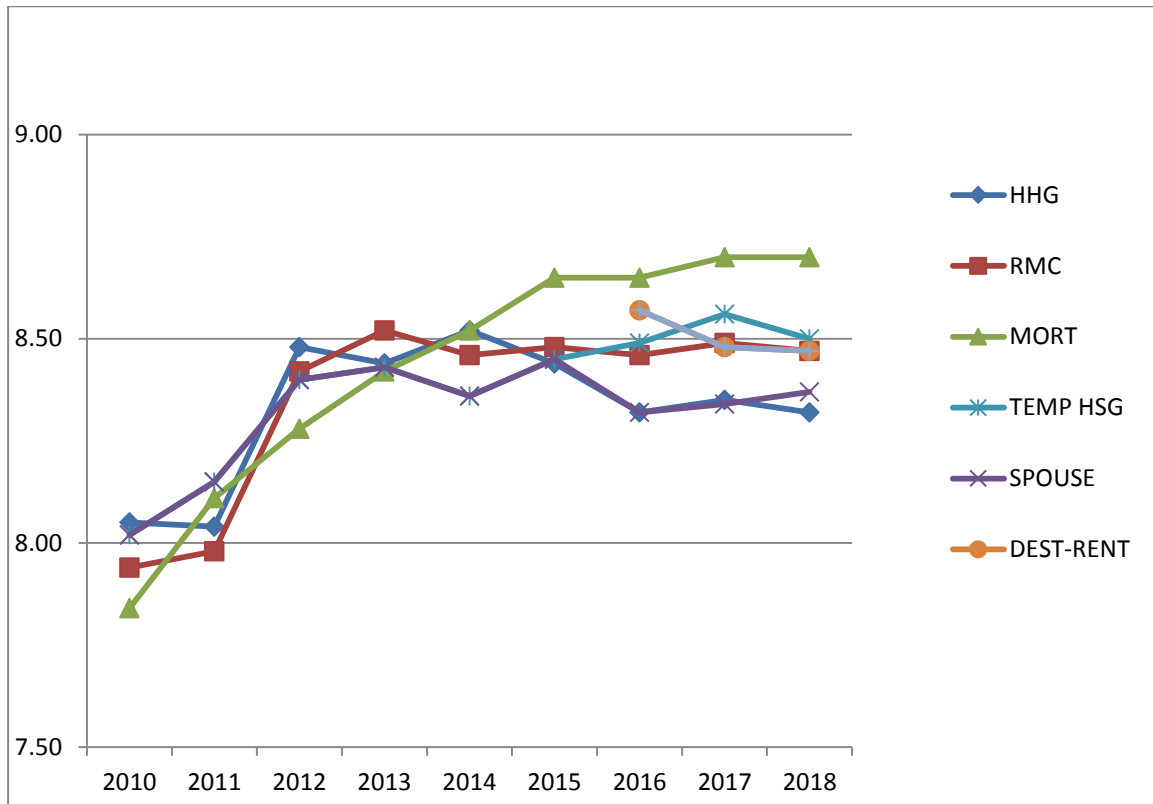
The following 2 charts show the average score and net satisfaction for the six industries evaluated by employees undergoing some form of domestic US mobility in the 2018 survey.



The Mortgage provider category earned the highest customer evaluations among the six shown.

CHANGES IN CUSTOMER SATISFACTION OVER RECENT YEARS

The following graph shows the change in employees' satisfaction, both domestic US transferees and assignees, expressed on a 10-point scale (10 high). Notice the left y-axis scale shows 9, not 10, as the upper limit.



The Relocation Mortgage category (green line) has shown the most consistent improvement over the 9 years. This improvement coincides with the economic improvement since the recession.

The Spouse-Partner-Family service category (purple line) was the only category improving results from last year.

The Household Goods Shipping category (blue line) earned the lowest evaluations this year and continues to realize lower customer satisfaction evaluations on a year-to-year basis.

Notice, since 2013 the degree of category differentiation has increased reaching the highest spread this year compared to all previous years.



HOURS OF SERVICE REGULATIONS

In the summer of 2018, Budd Van Lines produced an educational video discussing DOT Hours of Service rules (HOS) and the impact on drivers and relocating families. We successfully worked through the first peak season with the Electronic Log Devices (ELD's) requirement through on-time service and a safe driving record across the fleet. It wasn't easy! Our customer service teams and clients helped by counseling relocating families on the DOT rules.

Check out the video: <https://vimeo.com/265645008/e9cd4cb131>

1. HOUSEHOLD GOODS SHIPMENT

Only Household Goods firms with 150 or more transferee or assignee evaluations from a minimum of five corporations are shown below. The chart is segmented between franchise systems, independents and Other Shipping Systems. The chart is shown in alphabetical order within each category.

The 9 suppliers listed are arguably the largest providers in this relocation service category. Many transferee/assignee evaluations representing smaller HHG carriers are included in *All Other, Uncertain* category due to small sample sizes. Survey respondents include any transferred employee or assignee receiving pack or unload services over the last 12 months. Other factors, such as load size, distance shipped, HHG benefits received or to/from location is not considered.

There is always small amount of error in every statistical analysis. The smaller the sample size the greater the likelihood of lower accuracy. The scores below should be viewed comparatively not in absolute terms.

	Scores >										Total Surveys	Aver. Score	Top Block %	Bottom Block %	Net Satis. %
	1	2	3	4	5	6	7	8	9	10					
FRANCHISE-SYSTEMS															
Allied Worldwide	14			1	9	3	178	253	209	121	788	8.18	42%	3%	38%
Arpin Van Lines					3	1	34	46	76	21	181	8.40	54%	2%	51%
Atlas Van Lines	16			2	8		193	240	270	205	934	8.37	51%	3%	48%
Mayflower	5				3		92	100	58	18	276	7.85	28%	3%	25%
NorthAmerican	8				4	2	103	123	107	116	463	8.35	48%	3%	45%
United Van Lines	8			1	13	1	298	553	405	332	1611	8.42	46%	1%	44%
Wheaton Van Lines	5				1	1	29	62	43	30	171	8.20	43%	4%	39%
INDEPENDENTS															
Budd Van Lines					3	1	50	69	80	46	249	8.45	51%	2%	49%
New World Van Lines	7				4	2	62	101	71	80	327	8.32	46%	4%	42%
Other Carriers or Uncertain	14	2		2	12	2	313	468	345	287	1445	8.31	44%	2%	42%
OTHER SHIPPING SYSTEMS															
U-Haul, Budget, Enterprise, etc.	3	1			16	4	39	61	71	74	269	8.36	54%	9%	45%
ABF, PODS, Other "container"	2						15	17	20	6	60	8.05	43%	3%	40%
HHG INDUSTRY	82	3	0	6	76	17	1406	2093	1755	1336	6774	8.32	46%	3%	43%

The industry earned an average score of 8.32 from transferees/assignees and net satisfaction of 43%. Both metrics are slightly lower than the 2017 survey.

Among the Franchise System service providers United Van Lines earned the highest average score followed by Arpin Van Lines and Atlas Van Lines. Among the same category Arpin Van Lines followed by Atlas Van Lines earned the highest net satisfaction percentage.

Among independent carriers Budd Van Lines earned the highest average score and net satisfaction percentage.

None of the 9 listed carriers improved their score from the prior survey.

2. RELOCATION MANAGEMENT COMPANIES (RMC)

The chart below shows two segmentations. The top chart shows suppliers based on 5 or more corporations represented generating 250 or more end-user evaluations. The second chart shows all other suppliers based on 100 to 250 evaluations with at least 3 corporations represented. Also included in this chart, combined in *All Others*, are RMC firms evaluated by fewer than 100 evaluations or less than 3 corporations represented. Both segments are in alphabetical order.

End-user evaluations include any domestic transferee or assignee regardless of homeowner and renter status or new hire versus existing employee. Evaluations from end-users regardless of relocation policy packages obtained are included.

There is always small amount of error in every statistical analysis. The smaller the sample size the greater the likelihood of lower accuracy. The scores below should be viewed comparatively not in absolute terms.

	Scores>										Total Surveys	Aver. Score	Top Block %	Bottom Block %	Net Satis. %
	1	2	3	4	5	6	7	8	9	10					
Large-size suppliers (sampling from 5 to more corporations & 250+ transferees)															
Altair Global Relo.	1				2	1	82	127	122	104	439	8.53	51%	1%	51%
BGRS	2				4	1	65	131	130	51	384	8.36	47%	2%	45%
Cartus	5			1	7	3	307	452	371	387	1533	8.50	49%	1%	48%
Cornerstone Relo. Grp.	1	1			2	1	64	117	81	107	374	8.56	50%	1%	49%
SIRVA Relocation	2				3		146	254	190	176	771	8.48	47%	1%	47%
Weichert Workforce Mobility	3				1	2	113	129	210	111	569	8.51	56%	1%	55%
Mid-Size suppliers (sampling from 3 to 5 corporations contributing 100+ evaluations)															
Aires	1				3		13	55	53	17	142	8.41	49%	3%	46%
Graebel Companies					1	1	28	63	52	37	182	8.51	49%	1%	48%
Lexicon Relocation					1	1	28	64	62	35	191	8.52	51%	1%	50%
MSI Global Talent Sol.	3				1		26	53	37	23	143	8.23	42%	3%	39%
NEI Global Relo.							29	82	61	45	217	8.56	49%	0%	48%
Plus Relocation					1	1	32	46	62	34	176	8.53	55%	1%	53%
RELO Direct	2					1	21	38	46	28	136	8.48	54%	2%	52%
TheMIGroup					3	1	24	39	33	21	121	8.33	45%	3%	41%
ALL OTHER (1 or 2 corps.)	5			1	3	2	122	211	93	146	583	8.36	41%	2%	39%
RELOC. MGMT. INDUSTRY	25	1	0	2	33	15	1100	1860	1601	1324	5961	8.48	49%	1%	48%

The industry earned an average score of 8.48 and net satisfaction of 48%. Both metrics are in the same range, but slightly lower, than the 2017 survey results.

In the large-size segment three firms are noted: Cornerstone Relocation Group (highest averages score) and Weichert Workforce Mobility (highest net satisfaction). Altair Global earned the second highest evaluations on both metrics.

In the small-size segment, two notable suppliers are NEI Global Relocation with the highest average score and Plus Relocation Services earning the largest net satisfaction percentages.

A notable highlight, NEI Global was the only listed supplier without any bottom block (1 through 6) evaluations.

Aires, Graebel Relocation and SIRVA recorded improvements in average score compared to 2017. Aires and RELO Direct registered improvements in net satisfaction from last year.



THE DRIVER SHORTAGE

The acute shortage of drivers across the entire trucking sector continues to be our industry's greatest challenge. An aging driver population, high peak season demands, DOT regulations, inadequate compensation and the challenges associated with living on the road have brought the shortage to a critical level.

“In the past, ten percent of drivers were near retirement at any point in time, today it is 25%”: **Forbes** (transportation article July 19th, 2018).

Budd is addressing the shortage through a recruiting task force with initiatives including: increased pay, reimbursement for driving school, partnerships with communities and colleges and mentorship programs.

Our clients understand the impact of the shortage and have partnered with us through contracts focused on increased driver compensation.

Visit the website below to see an interview with Dave Budd about the driver shortage and the state of pricing in the moving industry:

<https://vimeo.com/268070772/6441fd6d51>

3. RELOCATION MORTGAGE PROVIDERS

The chart below shows two segmentations. The top chart shows suppliers based on 5 or more corporations represented generating 250 or more end-user evaluations. The second chart shows all other suppliers based on 100 to 250 evaluations with at least 3 corporations represented. Also included in this chart, combined in *All Others*, are suppliers evaluated by fewer than 100 employees regardless of the number of corporations they represent. Both segments are in alphabetical order.

End-user evaluations include any domestic transferee buying a home and securing a mortgage regardless of relocation policy packages obtained.

There is always small amount of error in every statistical analysis. The smaller the sample size the greater the likelihood of lower accuracy. The scores below should be viewed comparatively not in absolute terms.

	< Scores >										Total Surveys	Average Score	Top Block %	Bottom Block %	Net Satis. %
	1	2	3	4	5	6	7	8	9	10					
Large-size suppliers (sampling: 250+ evaluations; 5+ corporations)															
Guaranteed Rate	1				2	2	37	86	79	63	270	8.56	53%	2%	51%
Chase Mortgage		1			3		26	92	85	81	288	8.72	58%	1%	56%
Quicken Loans	2				1	2	68	175	262	169	679	8.75	63%	1%	63%
SIRVA Mortgage	2					1	27	87	92	77	286	8.71	59%	1%	58%
Wells Fargo Home Mort.	2			1	2	1	169	252	525	289	1241	8.73	66%	0%	65%
Mid-Size suppliers (sampling from 3 to 4 corporations contributing 100 to 250 evaluations)															
Huntington Bank						1	16	27	45	22	111	8.64	60%	1%	59%
Premia Relocation Mort.					3		15	67	71	54	210	8.74	60%	1%	58%
U.S. Bank	1					1	16	33	57	32	140	8.69	64%	1%	62%
Weichert Financial	2					1	16	70	87	33	209	8.57	57%	1%	56%
Others not listed above	1	1			1	1	27	53	10	68	162	8.62	48%	2%	46%
MORTGAGE INDUSTRY>	11	2	0	1	13	9	417	942	1313	888	3596	8.70	61%	1%	60%

There were fewer evaluations this year due to a higher rate of renters submitting survey evaluations.

Evaluations in the relocation mortgage category realized the same average score and net satisfaction as last year.

Overall, in the large-size segment Quicken Loans earned the highest average score and Wells Fargo Home Mortgage the highest net satisfaction percentage.

In the small-size segment Premia Relocation Mortgage earned the highest average score while U.S. Bank earned the highest net satisfaction percentage.

Huntington Bank, Premia Relocation Mortgage, U.S. Bank and Wells Fargo realized improvement from last year's evaluations.

4. CORPORATE TEMPORARY HOUSING SERVICES

The chart below shows three segmentations. The top chart shows suppliers based on 5 or more corporations represented generating 250 or more end-user evaluations. The second segment shows suppliers based on 100 to 250 evaluations with at least 3 corporations represented. Also included in this chart, combined in *All Others*, are suppliers evaluated by fewer than 100 employees regardless of the number of corporations they represent. Finally, for the first time, a third form of corporate housing entities, used by transferees and assignees are shown. Each segment is shown in alphabetical order.

End-user evaluations include any domestic transferee or assignee regardless of relocation policy package obtained. Only specific, named service firms generating 100 or more evaluations are shown.

There is always small amount of error in every statistical analysis. The smaller the sample size the greater the likelihood of lower accuracy. The scores below should be viewed comparatively not in absolute terms.

	< Scores >										Total Surveys	Aver. Score	Top Block %	Bottom Block %	Net Satis. %
	1	2	3	4	5	6	7	8	9	10					
Large sampling: 250+ evaluations with 5+ corporations represented															
National Corporate Housing	1				1		84	226	274	252	838	8.82	63%	0%	63%
Nomad Temporary Housing					1		36	59	98	81	275	8.80	65%	0%	65%
Oakwood Worldwide	3				3		168	305	441	337	1257	8.73	62%	0%	61%
Weichert Corporate Housing						2	63	75	117	58	315	8.53	56%	1%	55%
Small sampling: 100 to 250 evaluations from 3 to 5 corporations represented															
BridgeStreet Global Hospitality	3				1		28	62	47	19	160	8.21	41%	3%	39%
SIRVA Corporate Housing	1					1	31	49	63	18	163	8.36	50%	1%	48%
SuiteAmerica					1	1	17	45	64	49	177	8.79	64%	1%	63%
Others & unidentifiable <100 evaluations	16	5			6	4	315	365	348	299	1358	8.34	48%	2%	45%
Extended stay and fixed locations															
Extended Stay America	4				3	1	24	36	27	22	117	8.07	42%	7%	35%
Hotels & franchise chains	36	2			43	6	239	416	355	307	1404	8.23	47%	6%	41%
TEMP. HSG. INDUSTRY>	64	7	0	0	59	15	1005	1638	1834	1442	6064	8.50	54%	2%	52%

The average score this year is 8.50 for the service category with a net satisfaction percentage of 52%. Both metrics are lower than the 2017 survey.

Overall, National Corporate Housing posted the highest average score while Nomad Temporary Housing earned the highest net satisfaction percentage.

Excellence, generally defined by achieving an average score of 8.50 and net satisfaction of 60% or higher, were achieved by the two firms noted above as well as Oakwood Worldwide and SuiteAmerica.

Expansion of the GA Service Center



Budd GA expanded from 40,000 sq. ft. to 90,000 sq. ft. The new facility has the best in driver amenities including: lounge, work stations, showers, washers & dryers and 24 hour secure access.

The Load it Once system has been operational in the facility since it opened.



5. SPOUSE - PARTNER SUPPORT SERVICES

The 3 service firms listed below provide spouse-partner support services to the transferee/assignees' family and each obtained 100 or more transferees or assignees evaluations. Note: there is no "other" supplier – the few service firms noted by employee's generated very small sample sizes.

There is always small amount of error in every statistical analysis. The smaller the sample size the greater the likelihood of lower accuracy. The scores below should be viewed comparatively not in absolute terms.

	< Scores >										Surveys	Aver. Score	Top Block %	Bottom Block %	Net Satis. %
	1	2	3	4	5	6	7	8	9	10					
Impact Group		1			2	1	104	155	126	92	481	8.40	45%	1%	44%
Lee Hecht Harrison	1	1			2		21	37	28	19	109	8.24	43%	4%	39%
Ricklin-Echikson & Assoc.	2				1	3	34	58	47	38	183	8.36	46%	3%	43%
SPOUSE-PART. SUPPORT	3	2	0	0	5	4	159	250	201	149	773	8.37	45%	2%	43%

The category achieved higher evaluations this year compared to last year.

IMPACT Group earned the highest metrics in both average score and net satisfaction.

6. DESTINATION - RENTAL SERVICES

The service firms listed below provided destination-rental services to 100 or more transferee and assignees. A few other service suppliers, including relocation management companies, generated far less than 100 evaluations and are combined in "All Other."

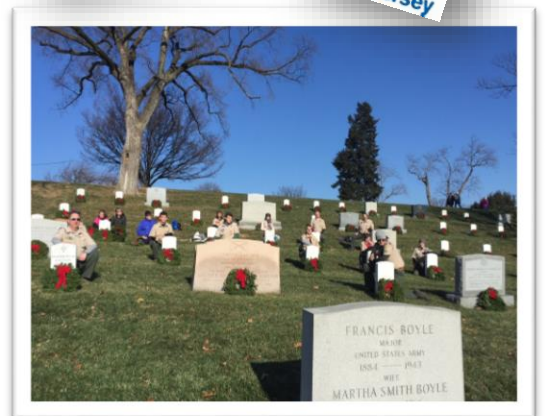
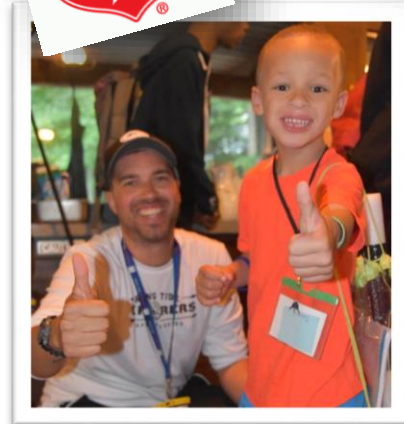
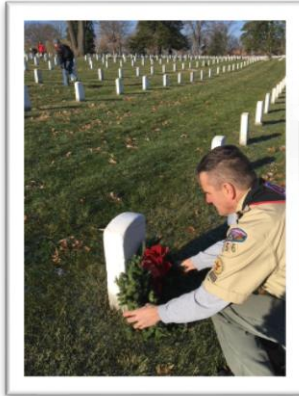
There is always small amount of error in every statistical analysis. The smaller the sample size the greater the likelihood of lower accuracy. The scores below should be viewed comparatively not in absolute terms.

	< Scores >										Total Surveys	Aver. Score	Top Block %	Bottom Block %	Net Satis. %
	1	2	3	4	5	6	7	8	9	10					
CORT	3				1	1	36	43	31	30	145	8.20	42%	3%	39%
Dwellworks Rental / Destination	3				1		41	47	63	51	206	8.49	55%	2%	53%
National Rent. Ass't & Dest. Svc.	3					1	27	55	49	41	176	8.46	51%	2%	49%
PorchLight Rental & Dest Svc.		1			1		23	67	77	45	214	8.63	57%	1%	56%
Others not listed	2				2	1	33	79	66	50	233	8.48	50%	2%	48%
DEST & RENTAL SRVC.	11	1	0	0	5	3	160	291	286	217	974	8.47	52%	2%	50%

Overall, this relocation category achieved the same range of metrics as last year.

Within this small sample size PorchLight Rental and Destination Services achieved the highest average score and the highest net satisfaction percentage.

Budd Employees Give Back!





2018 Healthy Workplace Recognition Award Silver Medalist



Thanks to the direction of our Human Resources Manager, Tracee Wilcox, and her team, Budd was recognized by Somerset County for our wellness initiatives.

