

TRIPPEL®

2024 Relocating Employee Survey

Budd Van Lines leads the survey
since 2004:

- ▶ ***Highest Top Block Scores in the Nation***
- ▶ ***#1 Net Satisfaction Rating***

Includes category ratings for:

Relocation Management
Temporary Living
Destination-Rental
Mortgage



AN ANNUAL SURVEY BY **TRIPPEL SURVEY & RESEARCH**

BUDD
VAN LINES

Thirtieth Annual
***Nationwide Relocating Employee Survey*®**
Results for 2024

Prepared by:
Trippel Survey & Research, LLC
July 2024

BACKGROUND INFORMATION

The 30th annual *Nationwide Relocating Employee Survey* © was conducted throughout an eight-month period ending June 30, 2024. 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 and employees going on domestic US assignments. 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 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 five categories: household goods services, relocation management services, mortgage services, corporate temporary housing services and destination-rental services. These are the services many corporations provide to either transferees or assignees.

The survey period accumulated opinions from 3995 transferees/assignees representing 58 corporations, federal government entities or non-profit organizations. The total participation rate is higher than last year's survey. There is a margin of sampling error in all service categories due to low sample size.

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SURVEY RESULTS – INDUSTRIES' OVERVIEW

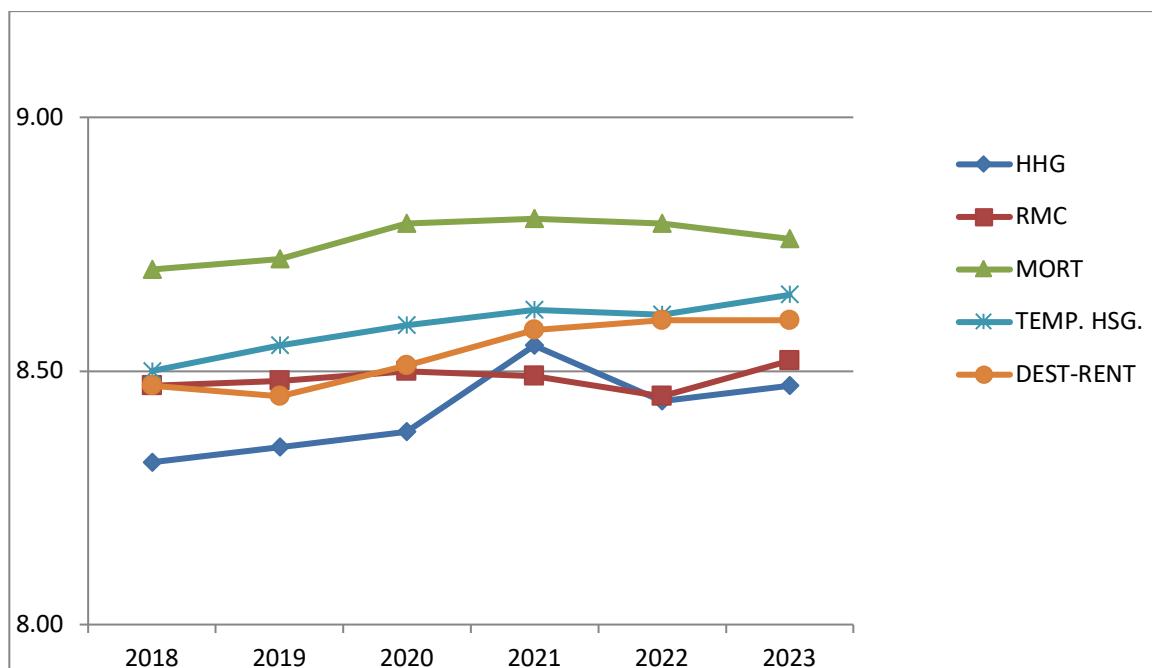
TRANSFEREE & ASSIGNEE SATISFACTION

The following chart shows the five surveyed relocation service categories, the number of evaluations received, average score and the percentage of top block, bottom block and the net satisfaction percentage. Note: net satisfaction percentage is rounded to nearest full percentage point.

Industry	Number Evaluations	Average Score	Top Block	Bottom Block	Net Satisfaction
Household Goods	3940	8.43	48%	3%	46%
Relocation Mgmt.	3820	8.55	53%	1%	51%
Mortgage	2033	8.76	65%	2%	63%
Temporary Housing	2904	8.67	61%	2%	59%
Destination & Rental Svc.	842	8.54	50%	1%	49%

CHANGES IN CUSTOMER SATISFACTION OVER RECENT 6 YEARS

The following graph shows the change in employees' average score over a 6-year period starting 2019 through 2024. Notice the left y-axis scale shows 9, not 10, as the upper limit.



A summary of the five relocation categories' trend show:

- Satisfaction with household goods carriers decreased from last year and continues a slight decrease in average score year-to-year from its recent 2021 high,
- Customer satisfaction using the services of relocation management companies improved from last year reaching a six-year and all-time high,
- The customers evaluating the mortgage providers report a satisfaction average score consistent with last year's average, and remains in a tight range within the recent 6 years,
- Customer using corporate temporary housing service providers report a continued and steady increase satisfaction, and,
- The customers using providers of destination-rental services report a small dip in satisfaction.

Comparing these five industry scores on a pre-COVID (years immediately before 2020) and post-COVID analysis (2022 and later) shows improvement in end-user satisfaction in all five industries.

1. HOUSEHOLD GOODS SHIPMENT

Only Household Goods firms with 100 or more evaluations representing a minimum of five client corporations are shown. HHG carriers with fewer than 100 evaluations or fewer than 5 corporations represented are combined in All Other. The top chart of two shows the 6 carriers meeting the minimum sample size requirements. This chart also shows the few dozen “container” service providers, small local carriers and any carriers unidentified by the end-user.

The second chart shows the larger affiliated carriers aligned with the brand they represent.

If a respondent moved furniture using an identified (or unidentified) carrier or via employee pack & haul means (ex: U-Haul, PODS) the evaluation is 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.

HHG carriers	< Scores >										Total Surveys	Aver. Score	Top Block %	Bottom Block %	Net Satis. %
	1	2	3	4	5	6	7	8	9	10					
Allied Worldwide				2	4	3	102	221	175	102	609	8.41	45%	1%	44%
Atlas Van Lines	1	1			3	8	192	279	188	170	842	8.35	43%	2%	41%
Budd Van Lines	2				1	1	35	44	102	31	216	8.51	62%	2%	60%
Mayflower Van Lines	2				2	1	20	56	30	26	137	8.29	41%	4%	37%
NorthAmerican Van Lines					1	3	65	84	154	88	395	8.65	61%	1%	60%
United Van Lines	3	1			17	9	207	405	302	239	1183	8.40	46%	3%	43%
Other or Uncertain carriers	3	1			15	8	88	127	92	163	497	8.49	51%	5%	46%
Container services					3	4	8	16	15	15	61	8.33	49%	11%	38%
HHG Carriers & Containers	11	3	0	2	46	37	717	1232	1058	834	3940	8.43	48%	3%	46%
SIRVA Brand	0	0			5	6	167	305	329	190	1004	8.50	52%	1%	51%
Unigroup Brand	5				19	10	227	461	332	265	1320	8.39	45%	3%	43%
Atlas		1			3	8	192	279	188	170	842	8.35	43%	1%	41%

The industry earned an average score of 8.43 from transferees/assignees and net satisfaction of 46%. Both metrics are slightly lower than the 2023 survey.

Among the six listed carriers northAmerican Van Lines earned the highest average score while Budd Van Lines earned the second highest average. Both carriers earned the same high 60% net satisfaction percentage.

Among the three largest HHG entities the Sirva brand (including Allied, northAmerican) earned the slightly highest combined, weighted average score and the highest net satisfaction percentage.

2. RELOCATION MANAGEMENT COMPANIES (RMC)

The chart below shows evaluations of RMC suppliers segmented by sample size. Large sampling is RMCs evaluated by 100 or more customers and representing a minimum of 5 different companies. Small sampling is RMCs evaluated by 100 or more end-user customers representing fewer than 5 companies. Smaller RMC (and there are many!) are captured in the *All other* row in the second, lower chart.

End-user evaluations include any domestic transferee or assignee regardless of homeowner and renter status, new hire versus existing employee status and/or relocation benefits packages obtained by their employer. Simply, if a respondent used the services a relocation management company the evaluation is 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.

Large sampling	< Scores >										Total Surveys	Aver. Score	Top Block %	Bottom Block %	Net Satis. %	
	1	2	3	4	5	6	7	8	9	10						
Aires					2	2	12	47	57	18	138	8.51	54%	3%	51%	
Altair Global Relocation	1				2		17	61	42	49	172	8.64	53%	2%	51%	
Cartus					5	3	146	194	175	173	696	8.51	50%	1%	49%	
Graebel	1				2		18	44	31	33	129	8.51	50%	2%	47%	
NEI Global Relocation							17	58	56	41	172	8.70	56%	0%	56%	
SIRVA	1				2		155	176	197	158	689	8.50	52%	0%	51%	
Weichert Workforce Mobility					1		82	135	170	132	520	8.67	58%	0%	58%	
Large sampling suppliers >	3	0	0	0	14	5	447	715	728	604	2516	8.56	53%	1%	52%	
Small sampling																
Bristol Global Mobility						1	40	25	39	51	156	8.63	58%	1%	57%	
Cornerstone						2	1	19	56	32	49	159	8.65	51%	2%	49%
NuCompass						1	1	23	29	24	32	110	8.55	51%	2%	49%
Plus Relocation								27	40	57	24	148	8.53	55%	0%	55%
RELO Direct						1		22	46	42	30	141	8.55	51%	1%	50%
All Other or unknown	2				4	5	106	178	178	117	590	8.46	50%	2%	48%	
Small sampling suppliers >	2	0	0	0	8	8	237	374	372	303	1304	8.53	52%	1%	50%	
All R.M.C.s	5	0	0	0	22	13	684	1089	1100	907	3820	8.55	53%	1%	51%	

The industry earned an average score of 8.55 and net satisfaction of 51+%. Both metrics are slightly higher than the 2023 survey results.

Among the suppliers meeting the large sample size requirements, NEI Global earned the highest average score while Weichert Workforce Mobility earned the best net satisfaction percentage.

In the “small sampling” category Bristol Global Mobility earned a highest average score and highest net satisfaction percentage.

3. RELOCATION MORTGAGE PROVIDERS

The chart below shows evaluations of relocation mortgage suppliers segmented by sample size. Large sampling is mortgage suppliers evaluated by 100 or more customers. Small sampling are mortgage suppliers evaluated by 99 or fewer end-user customers representing. Smaller mortgage providers with just a handful of evaluations are captured in the *All other* row.

End-user evaluations include any domestic homeowner transferee, regardless of new hire versus existing employee status and/or relocation benefits packages obtained by their employer. Simply, if a respondent obtained a mortgage for their new location home the evaluation is included. Since most corporations permit home buying transferees to select their own supplier the need for minimum client representation is irrelevant.

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.

Large sampling	< Scores >										Total Surveys	Average Score	Top Block %	Bottom Block %	Net Satis. %
	1	2	3	4	5	6	7	8	9	10					
JP Morgan Chase						18	56	129	62	265	8.89	72%	0%	72%	
Premia Relocation Mortgage	1				2	16	63	79	37	198	8.63	59%	2%	57%	
Rocket Mortgage						29	126	202	161	518	8.96	70%	0%	70%	
Sirva Mortgage		1			2	1	19	36	65	37	161	8.66	63%	2%	61%
U.S. Bankcorp					3	22	37	71	49	182	8.76	66%	2%	64%	
Weichert Financial					1	11	35	37	41	125	8.84	62%	1%	62%	
Large sampling suppliers >	1	1	0	0	8	1	115	353	583	387	1449	8.83	67%	1%	66%
Small sampling															
Bank of America	3				2	1	8	26	28	27	95	8.47	58%	6%	52%
Guaranteed Rate		1			1	1	10	24	41	20	98	8.60	62%	3%	59%
Huntington Bank					1	2	8	20	31	26	88	8.77	65%	3%	61%
Others not listed above	6				3	1	11	83	109	62	275	8.61	62%	4%	59%
Small sampling suppliers >	11	0	0	0	8	6	40	163	219	137	584	8.58	61%	4%	57%
All suppliers >	12	1	0	0	16	7	155	516	802	524	2033	8.76	65%	2%	63%

Evaluations in the relocation mortgage category is approximately the same as last year. Average score is 8.76 while net satisfaction percentage is 63%.

Among the listed 6 suppliers in the large sampling segment Rocket Mortgage earned the highest average score (this is the highest average recorded in the survey). JP Morgan Chase earned the highest net satisfaction.

In the small sampling segment Huntington Bank earned the highest pair of metrics.

4. CORPORATE TEMPORARY HOUSING SERVICES

The chart below shows evaluations of corporate temporary housing suppliers segmented by sample size. Large sampling is temporary housing service firms evaluated by 100 or more customers and representing a minimum of 5 different companies. Small sampling is temporary housing service firms evaluated 99 or fewer end-user customers representing and/or fewer than 5 companies. Smaller temp housing providers, with just a handful of evaluations, are captured in the *All other* row.

End-user evaluations include any customer using the services of a temporary housing provider, regardless of homeowner or renter, new hire versus existing employee and/or relocation benefits packages obtained by their employer. Simply, if a respondent obtained stays in a temporary facility in their new location the evaluation is included.

There is always small amount of error in every statistical analysis. The smaller the sample size the greater the likelihood of lower accuracy.

Large sampling	< Scores >										Total Surveys	Aver. Score	Top Block %	Bottom Block %	Net Satis. %
	1	2	3	4	5	6	7	8	9	10					
Extended Stay America					1	9	47	38	14	109	8.50	48%	1%	47%	
National Corporate Hsg.	1				1	77	154	206	139	578	8.69	60%	0%	59%	
Nomad Temporary Hsg.					1	11	82	83	88	265	8.93	65%	0%	64%	
SIRVA Corporate Hsg.				1	1	29	46	68	51	196	8.69	61%	1%	60%	
SuiteAmerica						44	78	136	65	323	8.69	62%	0%	62%	
Weichert Corporate Hsg.	1				2	1	22	54	148	81	309	8.88	74%	1%	73%
Large sampling suppliers >	2	0	0	0	4	4	192	461	679	438	1780	8.75	63%	1%	62%
Small sampling															
Ascott Brand					2	2	17	27	33	21	102	8.47	53%	4%	49%
Bridgestreet Global	2				1	14	34	42	6	99	8.23	48%	3%	45%	
Churchhill Living					2	2	11	20	40	14	89	8.53	61%	4%	56%
Hilton Brand	1			1	3	6	26	38	15	90	8.47	59%	6%	53%	
Murphy's Corp. Housing	2				1	1	14	46	32	28	124	8.44	48%	3%	45%
Marriott brand	1				4	2	29	60	42	45	183	8.44	48%	4%	44%
Private housing					9	5	34	101	173	115	437	8.76	66%	3%	63%
Small sampling suppliers >	6	0	0	1	22	12	125	314	400	244	1124	8.56	57%	4%	54%
All suppliers >	8	0	0	1	26	16	317	775	1079	682	2904	8.67	61%	2%	59%

The average score this year is 8.67 for the corporate temporary housing category with a net satisfaction percentage of 59%. Both metrics are slightly higher than the 2023 survey.

Among the listed suppliers in the large sampling segment Nomad Temporary Housing earned the highest average score while Weichert Corporate Housing earned the highest net satisfaction percentage.

Please note, with more than 25% of corporations permitting assignees or transferees to use home sharing or private residences (see *Relocation Managers survey, May 2023*) for short term temporary housing this “supplier” is listed in the small sampling category, last row. Employees using these services are highly satisfied.

5. DESTINATION - RENTAL SERVICES

The chart below shows suppliers providing destination-rental services accumulating over 100 evaluations regardless of the number of corporations represented. A few other service suppliers 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					
Dwellworks					1	19	65	76	35		196	8.64	57%	1%	56%
National Corp. Hsg.					1		27	87	47	35	197	8.44	42%	1%	41%
PorchLight						24	47	44	32		147	8.57	52%	0%	52%
All Others	1				4	3	30	111	94	59	302	8.52	51%	3%	48%
All suppliers >	1	0	0	0	5	4	100	310	261	161	842	8.54	50%	1%	49%

The destination-rental services category realized a decrease in both average score and net satisfaction percentage compared to last year's survey results.

Within this relocation category, Dwellworks achieved the highest average score and the highest net satisfaction percentage for the second year in a row.