

# TRIPPEL

2024 NATIONWIDE RELOCATION MANAGERS' SURVEY

## CARRIER PERFORMANCE

Budd Van Lines - Highest Satisfaction  
& Top Block Scores



## WHAT MOBILITY MANAGERS ARE PREDICTING FOR 2024

Volumes, Policies, and Trends

## RELOCATION MANAGEMENT COMPANIES

Client Satisfaction with Household  
Goods Programs



**#1 IN AMERICA**

*David W. Budd, Sr.*

*Thank You To Our Customers!*

## INTRODUCTION FROM BUDD VAN LINES

The Relocation Manager's Report, an annual survey conducted by Trippel Survey & Research, queries Mobility Managers nationwide on policies, business climate, and carrier performance. Since 2006, Budd Van Lines has consistently ranked as a top performer in the U.S.

In the 2024 report, Budd Van Lines achieved the highest Top Block metrics, surpassing competitors by 10%, and Budd's Net Satisfaction results were 5% higher than the closest rival. We express gratitude to our customers for their trust, business, and partnerships.

### **A note from David W. Budd:**

2024 marks Budd Van Lines' 49th year in operation. Starting with one truck in 1975, it's been quite a journey.

There are a few things I am most thankful for:

**Validation of Our Concept:** The success of Budd Van Lines as an independent. I knew we could make a difference in the industry. The enduring success in the Trippel reports underscores the continued relevance of our approach. I thank every one of our drivers and employees.

**Realization of a Dream:** Our patented Load It Once system, a modular-containerized solution, has become a nationwide phenomenon, serving over 2000 customers last year alone. Its adoption not only benefits our clients but has also significantly strengthened Budd Van Lines as a company.

**Gratitude to Our Clientele:** A heartfelt thank you goes out to all our corporate clients and individual customers for entrusting us with their relocations. We take immense pride in moving the children and grandchildren of past customers, a testament to the enduring relationships we've built over the years.

We look forward every year to see how we performed in the eyes of our clients in the Trippel Survey. Your recognition of our efforts is deeply appreciated

**22<sup>nd</sup> ANNUAL RELOCATION MANAGERS' SURVEY<sup>®</sup>  
On HOUSEHOLD GOODS SHIPMENT (ADMIN. POLICY &  
PERFORMANCE) AND GENERAL RELOCATION ISSUES**

**FEBRUARY 2024**

**BACKGROUND**

Trippel Survey & Research, LLC conducts this annual survey to (1) obtain current information on HHG policy and program management, (2) obtain evaluations from corporate relocation managers regarding their level of satisfaction with the moving service industry and suppliers utilized in Domestic US relocation, and (3) general inquiry on various domestic transfer issues. This survey did not have corporate sponsorship.

**METHODOLOGY**

This is the twenty-second annual *Relocation Managers' Survey*<sup>®</sup> on Household Goods industry. Corporate relocation managers received an email message announcing the survey on January 15, 2024. A reminder notice was sent and the survey closed January 26<sup>th</sup>.

Of the 1,171 initial invitations sent via SurveyMonkey 9 were hard or soft bounced and 6 opted out. Among the remaining invitations 124 managers participated; a small increase from the 2023 annual survey.

Survey responses are presented in this report as reported by *SurveyMonkey*, the web-survey service firm used in this endeavor. When appropriate, comments are made throughout the report regarding survey responses and industry trending.

**CONFIDENTIALITY**

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Budd Van Lines purchased this report and the marketing license. The report may be shared among internal stakeholders and external stakeholders including promotion. The report is available for purchase by contacting Trippel Survey & Research, LLC

**DISCLAIMER**

Since the last survey on this topic one year ago no household goods corporation or relocation management service provider engaged Trippel Survey & Research, LLC in consulting or research assignments or survey programs.

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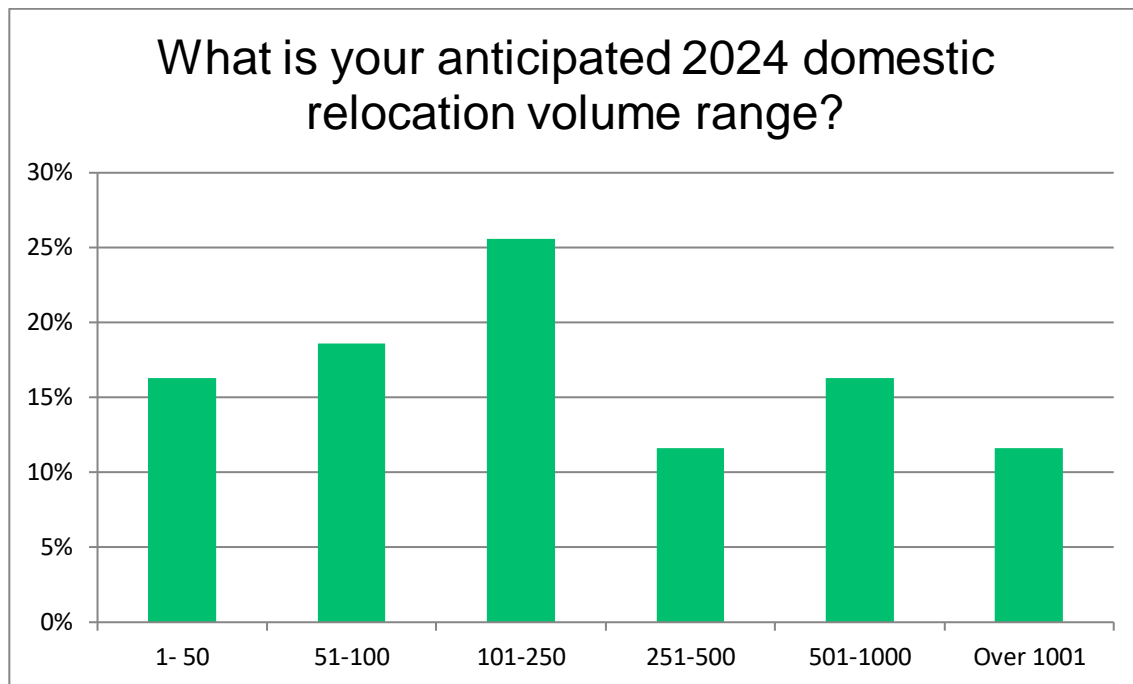
## CORPORATE PARTICIPANT PROFILE

The following chart shows 124 participating corporate managers in this survey of which two did not provide an email address.

Email address (used to send you the final report).	
Answer Options	Response Count
	124
<i>answered question</i>	123
<i>skipped question</i>	1

The number of participants this year is 2% higher than last year's participation rate.

### ANTICIPATED 2024 DOMESTIC U.S. VOLUME



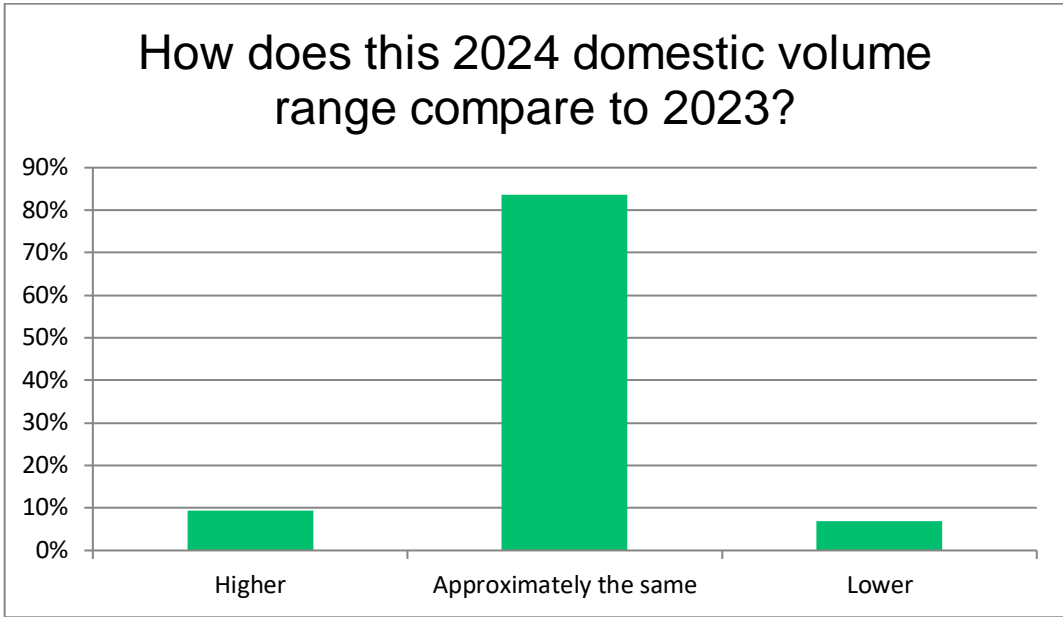
The 101-251-transfer volume segment range accounts 26% of participants, the largest segment among listed ranges.

Compared to the 2023 survey current survey respondents predict a slightly higher volume range for the current 2024 year.

This trend is reinforced with the answers provided to the next survey question.

### 2024 DOMESTIC VOLUME COMPARED TO 2023 ACTUAL

The following chart, shown on next page, indicates the 2024 domestic US volume will increase slightly from the 2023 calendar year.

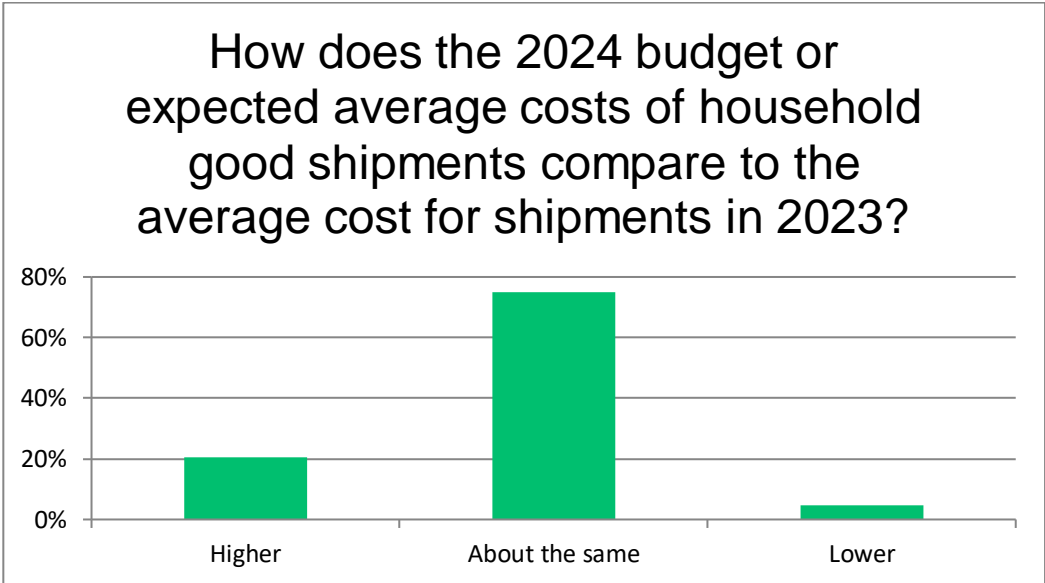


Approximately 84% of corporations expect volume to be the same this year compared to 2023. This percentage indicating “approximately the same volume” year-to-year is 20 percentage points higher than 2023 outcome.

Only 9% expect volume to increase while 7% expect domestic volume in 2024 to be lower.

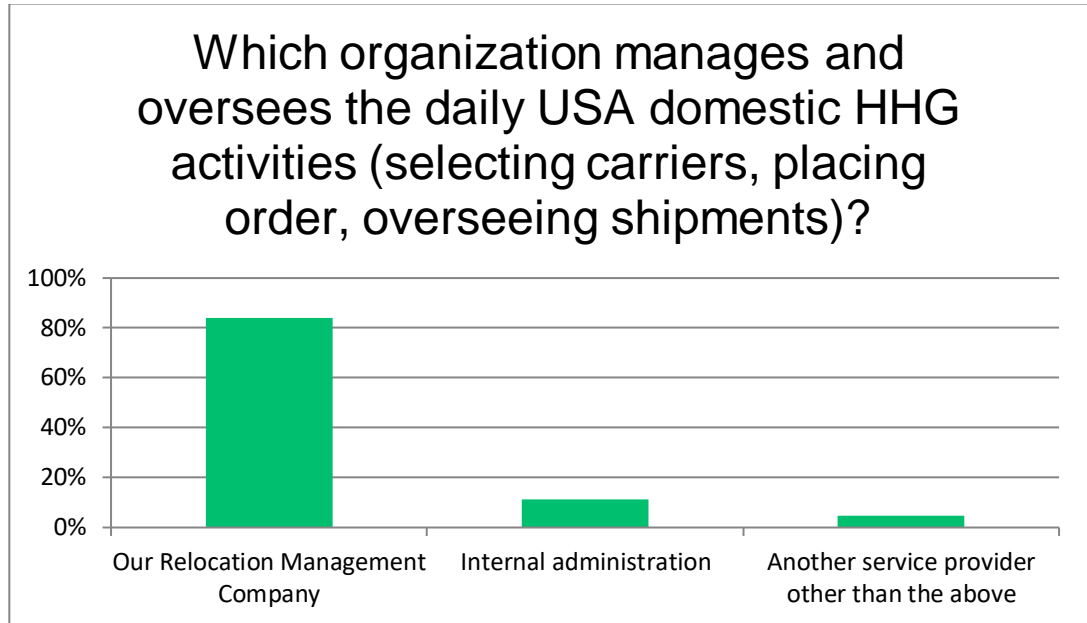
## HOUSEHOLD GOODS PROGRAM ADMINISTRATION

### CHANGE IN CORPORATE INVESTMENT IN THE HOUSEHOLD GOODS PROGRAM



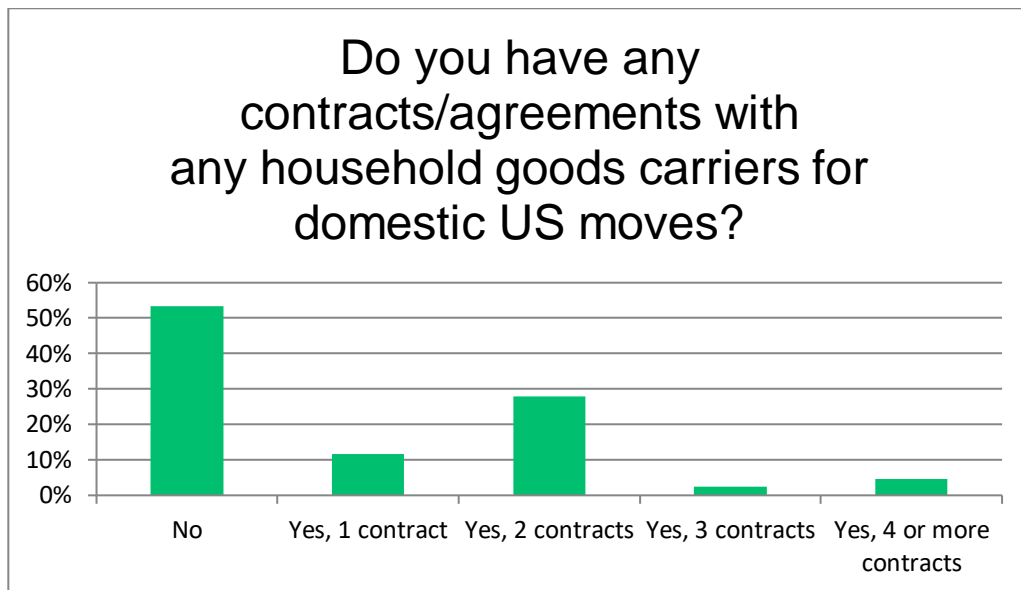
A large majority of corporate managers (75%) expect HHG costs to be approximate 2023 costs while 20% of managers expect costs to increase this year compared to 2023.

**DAILY MANAGEMENT OF HOUSEHOLD GOODS PROGRAM**



Approximately 74% of corporations outsource the management of the household goods program to a relocation management company. This is a 5-percentage point increase from last year’s survey and is in-line with pre-COVID pandemic outsourcing rates.

**CORPORATIONS CONTRACTING WITH HHG**





This year's survey indicates 53% of corporations do not have contracts with carriers. This rate is much lower than the 63% rate posted in last year's survey.

**AUDITS OF HHG**

**Are audits performed on each shipment to insure policy was followed and invoices are accurate? Multiple answers permitted.**

Answer Choices	Responses
Confidential information, can not be disclosed	2%
No; audits are not performed on our shipments	5%
Yes, our relocation management company performs audits	63%
Yes, another external company (not RMC) performs audits	21%
Our internal relocation team or audit function performs audits	7%
Multiple stakeholders perform audits	2%

Nearly two-thirds (63%) rely on the relocation management company to perform audits of policy and/or invoices. Another 21% use the services of another external supplier.

The combined "external" rate of 84% is similar to the 2023 survey.

**USE OF PERFORMANCE METRICS**

**Do you have performance metrics (i.e. SLAs) established with either the RMC, internal department or the carrier? Select the appropriate answer. Multiple answers permitted.**

Answer Choices	Responses
Confidential information; can not be shared	5%
No HHG performance metrics are established	9%
Yes, only the RMC (or internal department) has performance metrics	39%
Yes, only the Carrier/Agent has performance metrics	5%
Yes, both RMC and Carrier/Agent(s) have performance metrics	43%

Over 43% of corporations use performance metrics to evaluate performance of both the RMC and key carriers/agents. In the survey 2 years ago 50% acknowledged using these pair of metrics.

## HOUSEHOLD GOODS SHIPMENT POLICY

### PERMITTED STORAGE AND DURATION OF HOUSEHOLD GOODS

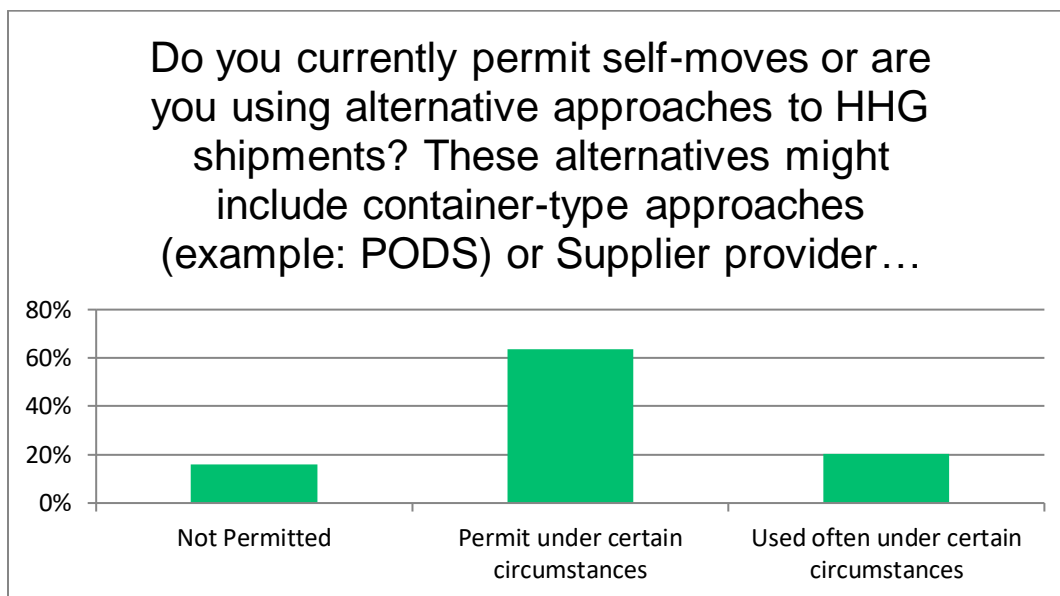
As the chart below indicates, permitting storage of household goods varies widely by organizational position.

**Which of the following organization positions are permitted storage in a typical domestic U.S. transfer? Multiple answers permitted.**

	NOT PERMITTED	30 Days (1 Mo.)	45 Days	60 Days (2 Mons.)	75 Days	90 Days or more (3+ Mons.)
Executive	2%	29%	2%	46%	0%	20%
Senior management	2%	37%	2%	44%	0%	15%
Management	5%	49%	0%	37%	0%	10%
Professional	13%	54%	0%	31%	0%	3%
Exempt, non professional	32%	38%	0%	27%	0%	3%
New Hire -experienced	24%	50%	0%	24%	0%	3%

Most corporations permit storage for professional and managerial positions. The two most common durations are 1 month (for lower org. levels) or 2 months (higher org. level); executives are infrequently permitted as much as 3 months of storage.

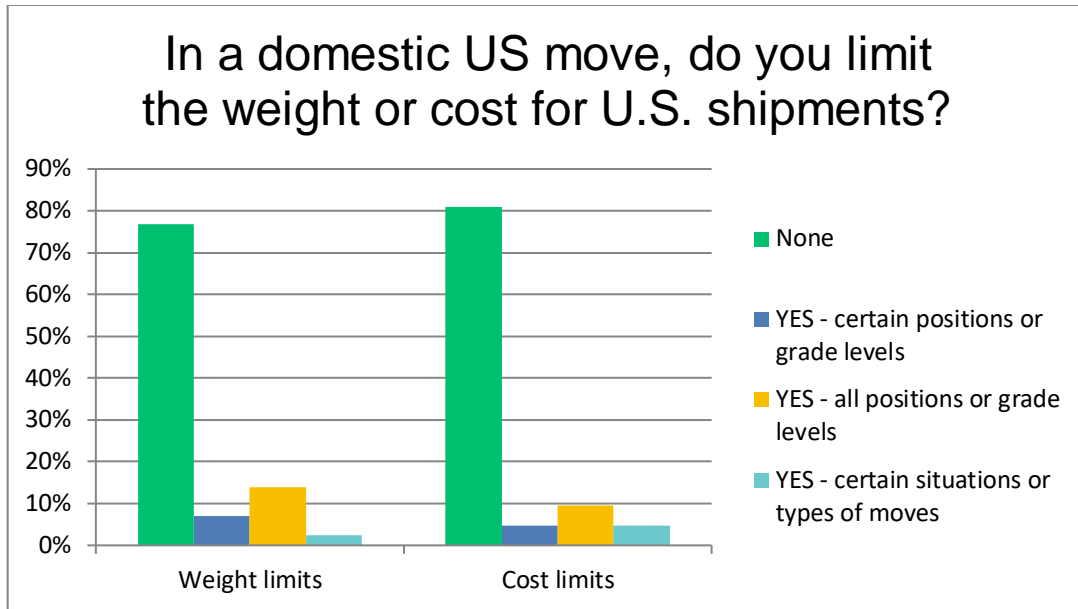
### ALTERNATIVE METHODS TO SHIP HOUSEHOLD GOODS





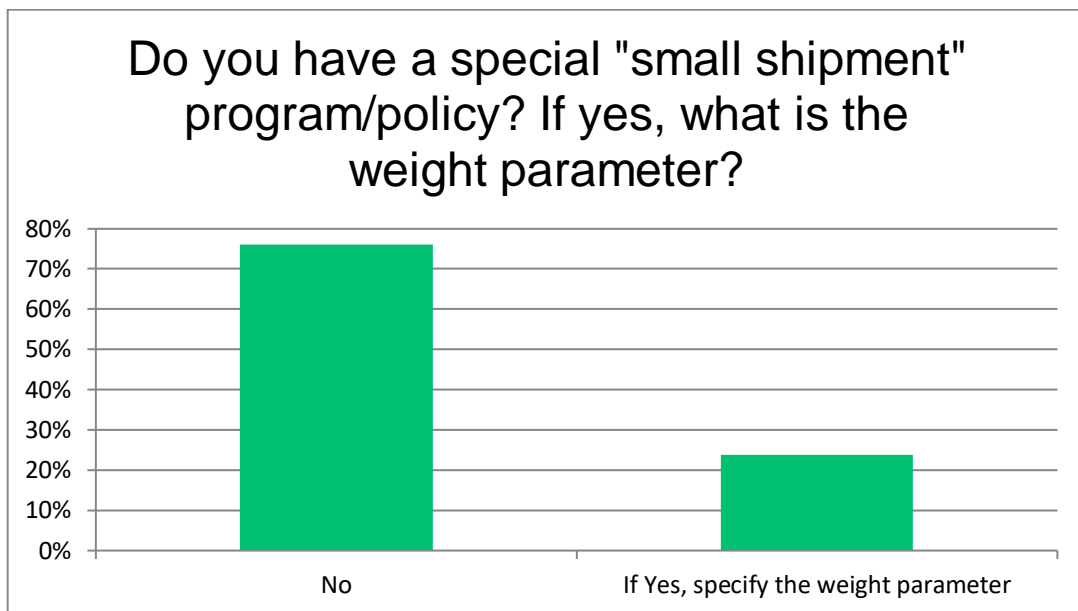
Only 16% of corporations **do not** permit either self-moves or alternative approaches to shipment of household goods. This is the same rate as the 2023 survey.

**LIMITS ON EITHER COST OR WEIGHT**



The chart indicates a very high majority of corporations have neither weight nor cost limits.

**“SMALL SHIPMENT” PROGRAMS**



Seventy-six (76%) of corporations do **not** have a small shipment program. Among those 24% of companies with a special Small Shipment program/policy slightly more than 50% of companies stated the weight limit was 5,000 lbs. The range was a maximum of 8,000# to a low of 2,000#.

## SUPPLIERS' PERFORMANCE

### OVERALL CARRIER PERFORMANCE

	Scores										Count	Aver	Top Block %	Bottom Block %	Net Satis. %
	1	2	3	4	5	6	7	8	9	10					
Allied Worldwide	0	0	0	0	1	1	4	4	4	3	17	8.06	41%	12%	29%
Atlas Van Lines	0	0	0	0	6	4	7	15	22	13	67	8.22	52%	15%	37%
<b>Budd Van Lines</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>1</b>	<b>1</b>	<b>4</b>	<b>8</b>	<b>6</b>	<b>22</b>	<b>42</b>	<b>8.98</b>	<b>67%</b>	<b>5%</b>	<b>62%</b>
Mayflower	1	0	0	0	0	0	4	2	1	3	11	7.64	36%	9%	27%
New World Van Lines	0	0	0	0	0	0	3	7	8	0	18	8.28	44%	0%	44%
NorthAmerican	0	0	0	0	2	0	5	7	2	6	22	8.14	36%	9%	27%
United Van Lines	0	0	0	0	0	0	4	8	9	7	28	8.68	57%	0%	57%
Other not listed	0	0	0	0	2	1	4	4	3	4	18	7.94	39%	17%	22%
	1	0	0	0	12	7	35	55	55	58	223	8.35	51%	9%	42%

The industry rebounded from last year's metrics. This year the industry average satisfaction score increased to 8.5 (10 high). Net Satisfaction increased to 42% from 33% a year earlier.

Nearly all service suppliers realized a small increase in performance metrics. **Budd Van Lines outperformed all carriers earning the best average score and the highest net satisfaction percentage.** United Van Lines earned the second highest average score and net satisfaction percentage.

### SATISFACTION WITH RELOCATION MANAGEMENT COMPANY MANAGING HHG

SUPPLIER	1	2	3	4	5	6	7	8	9	10	#	AVER	TOP RANGE	BOTTOM RANGE	NET SATIS.
Aires							1	1	2	2	6	8.83	66.7%	0.0%	66.7%
Altair Global								3	3	2	8	8.88	62.5%	0.0%	62.5%
Cartus							1	4	9	4	18	8.89	72.2%	0.0%	72.2%
Cornerstone Relo. Group							2	1	3		6	8.17	50.0%	0.0%	50.0%
Graebel		1						2	2	3	8	8.25	62.5%	12.5%	50.0%
NEI Global Relocation								3	1	1	5	8.60	40.0%	0.0%	40.0%
Plus Relocation								2	1	1	4	8.75	50.0%	0.0%	50.0%
RELO Direct							1	3		1	5	8.20	20.0%	0.0%	20.0%
SIRVA							2	7	3	6	18	8.72	50.0%	0.0%	50.0%
Sterling Lexicon							3	1	1		5	7.60	20.0%	0.0%	20.0%
Weichert Workforce Mobility							1	5	7	6	19	8.95	68.4%	0.0%	68.4%
Other					2			4	1	4	11	8.27	45.5%	18.2%	27.3%
	0	1	0	0	2	0	11	36	33	30	113	8.62	55.8%	2.7%	53.1%

With 74% of corporations relying on the services of a relocation management company to manage the transportation of household goods it is useful to question the level of satisfaction with the performance of the RMC managing the HHG program.

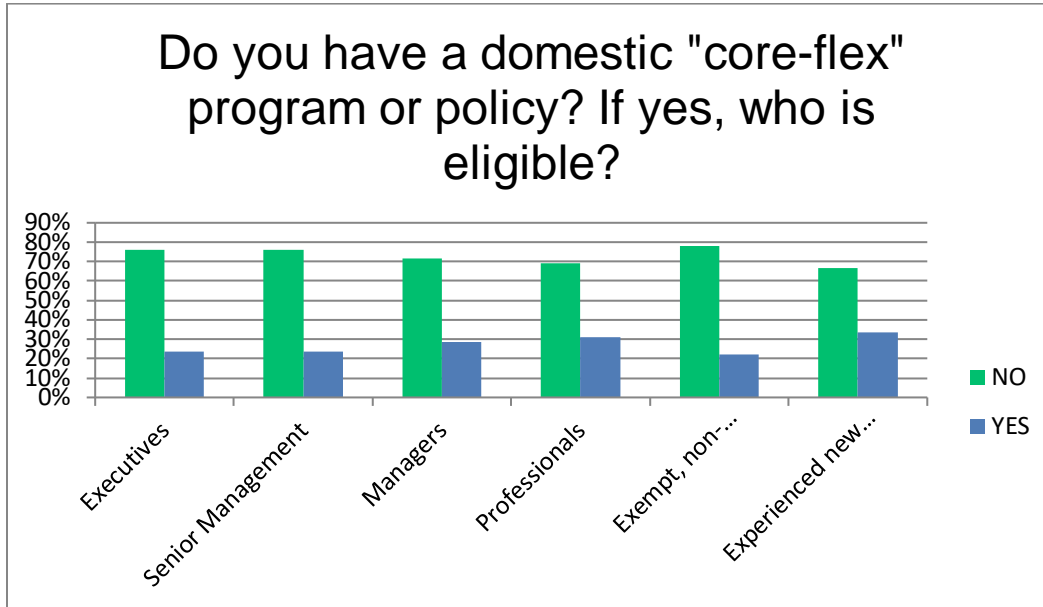
To this extent corporate managers gave the highest average score to Weichert Workforce Mobility for the second consecutive year while Cartus earned the largest net satisfaction percentage. Altair Global and Aires also earned "excellent" metrics.

*Report continued on the next page*

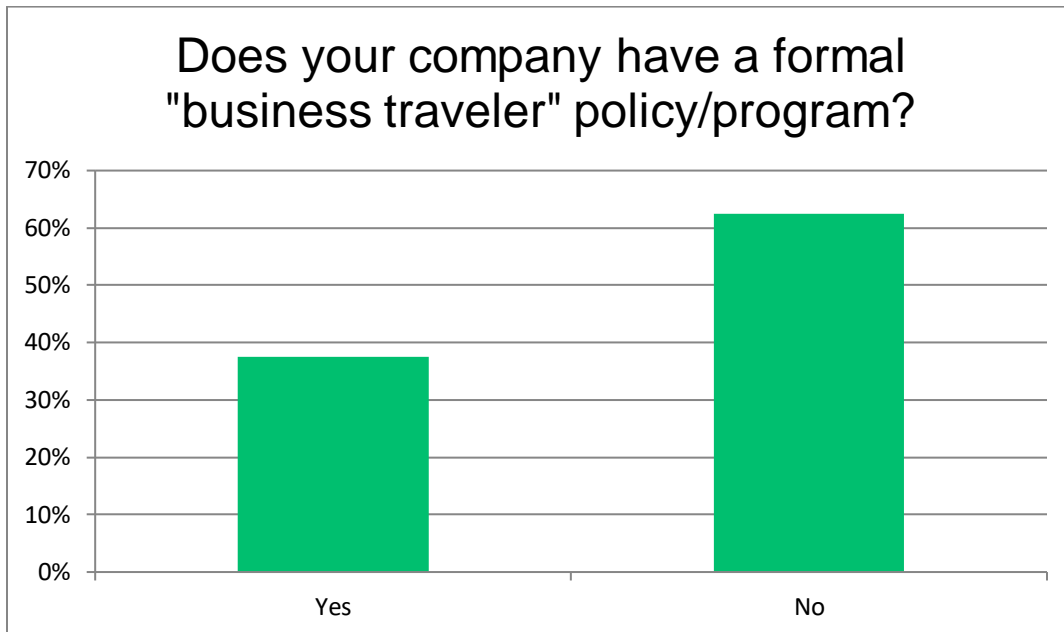
## MISCELLANEOUS RELOCATION INQUIRIES

### DOES YOUR DOMESTIC RELOCATION PROGRAM HAVE "CORE-FLEX" COMPONENT

A high majority of corporations do **not** have a core-flex program



### DOES YOUR COMPANY HAVE "BUSINESS TRAVELLER" PROGRAM & POLICY



A high majority (63%) of corporations do **not** have a "Business Traveler" program.

Among the corporations with a BT program the most common (nearly 60%) threshold is 30 days. One company has a low of 4 days and others have various ranges (15, 45 or 90). Many companies with a Business Traveller program the threshold depends on location and any visa requirements.

## **WHAT INTERNAL COMPANY FACTORS ARE IMPACTING RELOCATION**

**Which factors, if any, are impacting your organizations' domestic one-way transfer program? Multiple answers permitted.**

Answer Choices	Responses
Rising costs of relocation	61%
Employee inability or high reluctance to move	50%
Expansion of remote work programs or telecommuting programs	44%
Budget constraints or corporate reorganization	56%
Promotions or resignations	6%
Use of short term (domestic) assignments	3%
Use of frequent business travel policy or program	6%

Three factors are impacting corporate relocation programs: rising costs of relocation (61%), budget constraints or reorganization (56%) and, third highest reported factor is employee reluctance or inability to move (50%). Hybrid work location or remote work opportunities impact 40% of companies.

## **IS THE RATE OF TRANSFER ACCEPTANCE CHANGING FROM A YEAR AGO**

**Over the last year or so how is the rate of domestic transfer acceptance changing?**

Answer Choices	Responses
Transfer declines are rising	7%
Transfer acceptances are rising	0%
No real change to the trend	57%
I can't answer or don't have the information to answer this trend question	36%

More than one-half the corporate managers answering this question state the rate of acceptance (or decline) is not changing. Many managers do not have access to the information (or can't answer) while a very small percentage acknowledges transfer declines are increasing.

## **FACTORS FOR EMPLOYEES DECLINING DOMESTIC TRANSFERS**

**What reasons are often given for employees declining a domestic relocation? Multiple answers permitted.**

Answer Choices	Responses
Family (immediate or parental) issues	61%
Spouse or partner non-employment issues	11%
Spouse or partner employment issues	39%

Destination location issues (or desire to stay in current location)	50%
Political climate in new location destination	11%
Desire to work remotely	56%
Any form of economic issues (ex: housing costs, taxation costs, transportation, commuting issues)	72%
Any form of cultural or religious issues	0%
Personal issues that are not known	11%
Other factors (please specify)	0%

Regardless of the trend, survey respondents answered the question on the reason(s) for a transfer opportunity being declined.

Nearly 75% of managers' report "economic issues" is the dominant reason transfers opportunities are declined. Other factors having 50% or higher reported declining reasons are "family issues" (61%), "desire to work remotely" (56%) and "destination location" issue (50%).

### **BENEFITS OR INCENTIVES TO INCREASE TRANSFER ACCEPTANCE RATES**

**When an employee initially declines a transfer does your company offer any of the following non-standard benefits or incentives to increase the acceptance rate of transfer? Multiple answers allowed.**

Answer Choices	Responses
Bonus to relocate	50%
Cost of living adjustments	13%
Offering a particular type of home selling benefit	0%
Offering a particular type of home buying benefit	0%
Mortgage assistance benefits	6%
Change to duplicate housing benefits	6%
Offering special spouse or partner or family benefit	6%
Offer first-time home buyer benefit	0%
Other (please specify)	26%

Among the choices provided one-half the respondents said a "relocation bonus" is offered while another 13% said a COLA is used.

Approximately one-quarter of the survey respondents cited other incentives. Clarification among voluntarily provided typed answers include:

- Certain high level organizational positions might be provided a specific exception-to-policy approval to encourage a move,

- Corporate response to a decline depends on the urgency of the move, or area within the organization, or level of employee or new hire,
- If a transfer is declined our policy requires the employee to look for another company position allowing them to stay in the current location,
- If a transfer is declined the tone-way transfer might be changed to an in-country (long term) assignment.