

TRIPPEL®



2025 Relocation Managers Survey

Budd Van Lines Rated the Top Carrier in America



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



Consistency is a critical—and probably the hardest—goal to achieve in the moving industry. Every home is different, every customer has a unique personality and expectations, and every corporate client has a distinct mobility program.

Budd Van Lines has **consistently** ranked as the top carrier in the Trippel Reports for 21 consecutive years. Our commitment to quality, driver team service model, and patented innovations have been the key factors behind our success.

OVERALL CARRIER PERFORMANCE

	Average	Percent
Allied Worldwide	4.75	75.0%
Atlas Van Lines	4.41	41.4%
Budd Van Lines	4.75	75.0%
Mayflower	4.6	60.1%
New World Van Line	4.59	59.1%
NorthAmerican	4.32	31.8%
United Van Lines	4.5	51.7%
Wheaton	4.44	44.4%
Other not listed	4.44	51.4%
	450	53.1%

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

23rd ANNUAL *RELOCATION MANAGERS' SURVEY*©

On HOUSEHOLD GOODS SHIPMENT - ADMINISTRATION, POLICY & SUPPLIERS

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. This survey did not have corporate sponsorship.

METHODOLOGY

This is the twenty-third annual *Relocation Managers' Survey*© on the Household Goods industry. Corporate relocation managers received an email message announcing the survey on January 28, 2025. A reminder notice was sent and the survey closed February 11th.

Of the 1,062 initial invitations sent via SurveyMonkey 3 were hard or soft bounced. Among the remaining invitations 127 managers participated - a small increase from the 2024 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 a copy of this report and the marketing license. The report may be shared among internal stakeholders and any and all forms of external promotion.

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.

INDEX

<u>Topic</u>	<u>Page</u>
Profile	2
HHG program management	3 - 5
HHG policy	6 - 7
Suppliers' Performance	7 - 8

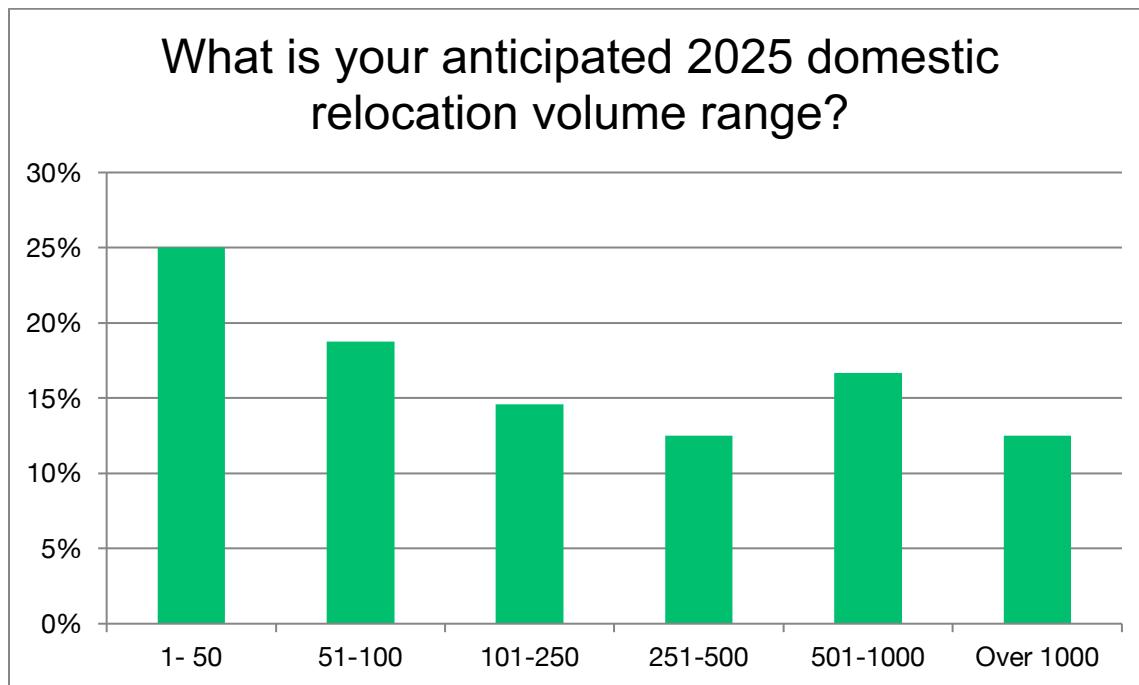
CORPORATE PARTICIPANT PROFILE

The following chart shows 127 participating corporate managers in this survey.

Email address (used to send you the final report).	
Answer Options	Response Count
	127
answered question	127
skipped question	0

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

ANTICIPATED 2025 DOMESTIC U.S. VOLUME



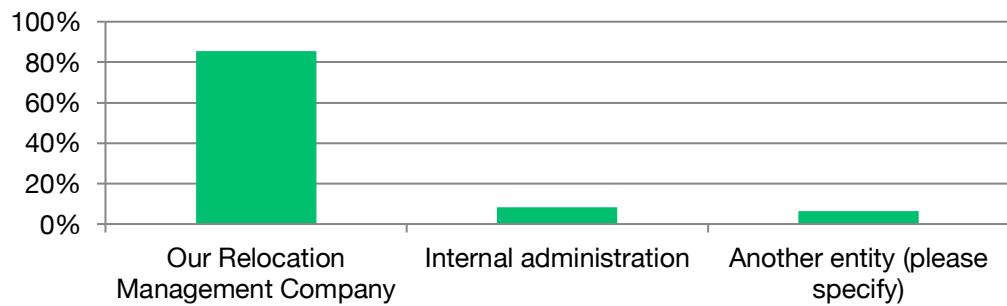
The 1-50-transfer volume segment range accounting for 25% of participants and is the largest segment among listed ranges.

Compared to last year, the 2025 survey respondents predict a slightly lower volume range compared to the prior year.

HOUSEHOLD GOODS PROGRAM ADMINISTRATION

DAILY MANAGEMENT OF HOUSEHOLD GOODS PROGRAM

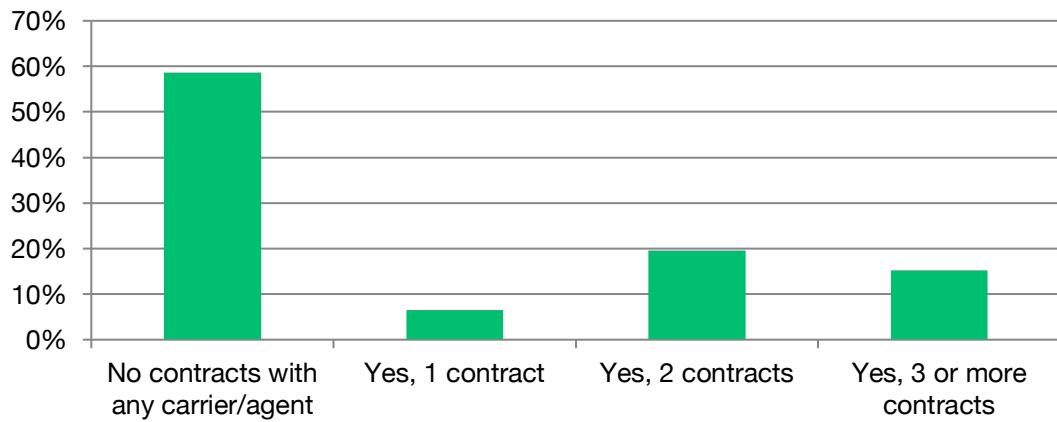
Which organization manages and oversees the daily USA domestic HHG activities (selecting carriers, placing order, overseeing shipments)?



Approximately 85% of corporations outsource the management of the household goods program to a relocation management company. This is a 10-percentage point increase from last year's survey and exceeds pre-COVID pandemic outsourcing rates.

CORPORATIONS CONTRACTING WITH HHG

Do you have any contracts/agreements with any household goods carriers for domestic US moves?



This year's survey indicates 59% of corporations do not have contracts with carriers. This rate is higher than last year's rate and continues to climb higher year after year.

AUDITS OF HHG

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

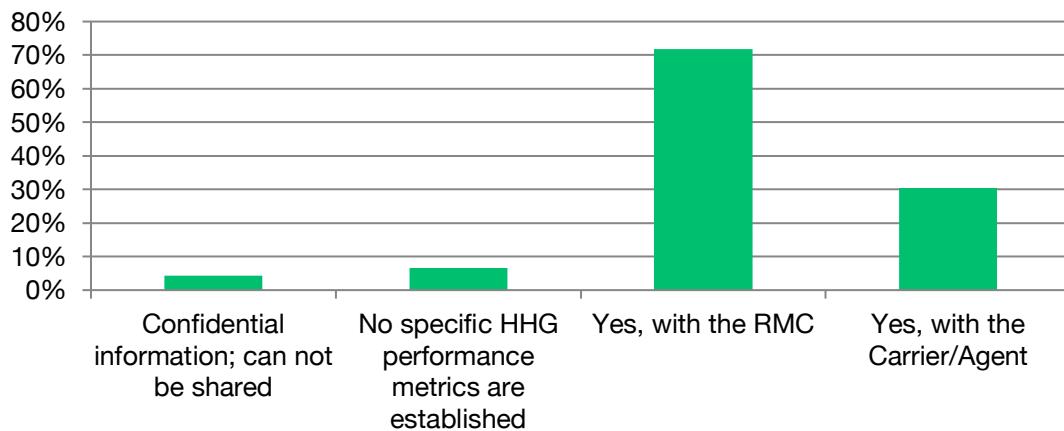
Answer Choices	Responses
Confidential information, cannot be disclosed	4%
No; audits are not performed on our shipments	4%
Yes, our RMC performs audits	67%
Yes, another external company (not RMC) performs audits	23%
Our internal relocation team or internal audit function performs audits	13%

Two-thirds (67%) rely on the relocation management company to perform audits of policy and/or invoices. Another 23% use the services of different external supplier.

The combined “external” rate of 90% audit rate far exceeds the 77% rate pre-COVID rate. Also, use of internal team audits continues to trend downward.

USE OF PERFORMANCE METRICS

Which stakeholder, if any, do you have performance metrics (i.e. SLAs) established? Multiple answers permitted.



The percentage of corporations using metrics continues to rise with the largest percentage establishing performance goals with the RMC. Only 30% of corporations also have metrics with the carrier(s). Very few corporations do not use performance metrics for the HHG program.

ANALYSIS OF PROGRAM ADMINISTRATION: More corporations are using the services of an RMC to directly manage the household goods program than ever before. Further, fewer corporations are signing contracts with carriers/agents; more are establishing performance goals with the RMC only and audits are routinely performed by the RMC only rather than internal teams.

HOUSEHOLD GOODS SHIPMENT POLICY

PERMITTED STORAGE AND DURATION OF HOUSEHOLD GOODS

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	5%	16%	0%	43%	0%	36%
Senior management	5%	23%	2%	57%	0%	14%
Management	7%	36%	5%	38%	0%	14%
Professional	20%	44%	2%	24%	0%	10%
Exempt, non-professional	42%	32%	3%	13%	0%	11%
New Hire -experienced	22%	43%	3%	24%	0%	8%

Most corporations permit storage for professional and all managerial positions. Durations of storage vary: 1 month for lower org. levels, 2 months for higher org. level and executives are frequently permitted as much as 3 months of storage.

ALTERNATIVE METHODS TO SHIP HOUSEHOLD GOODS

Do you currently permit self-moves or are you using alternative approaches to HHG shipments? These alternatives might include container-type approaches (example: PODS) or Supplier provider Self Pack & Load services. Multiple answers permitted.

Answer Choices	Responses
We do not currently permit self-moves or use alternative HHG approaches	30%
We permit self-moves under certain circumstances	57%

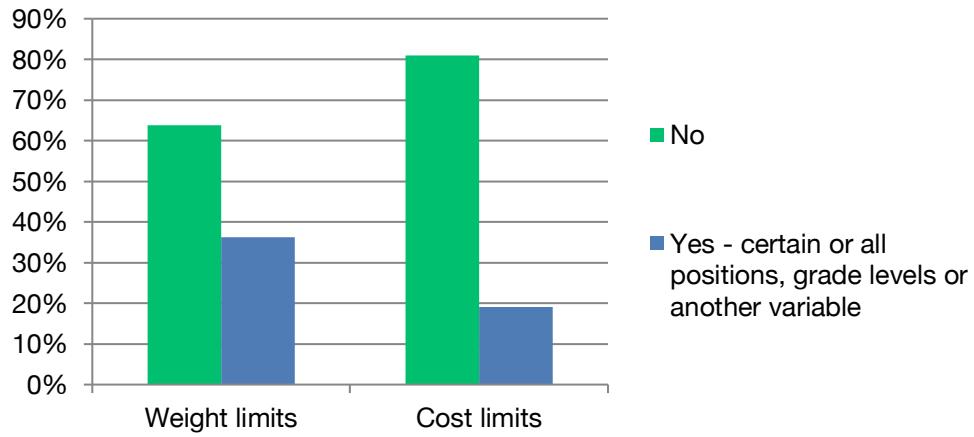
We do use alternative HHG approaches under certain circumstances

28%

Thirty percent (30%) of corporations do not permit alternative means to transport household goods. This is a substantially higher rate than recent previous years.

LIMITS ON EITHER COST OR WEIGHT

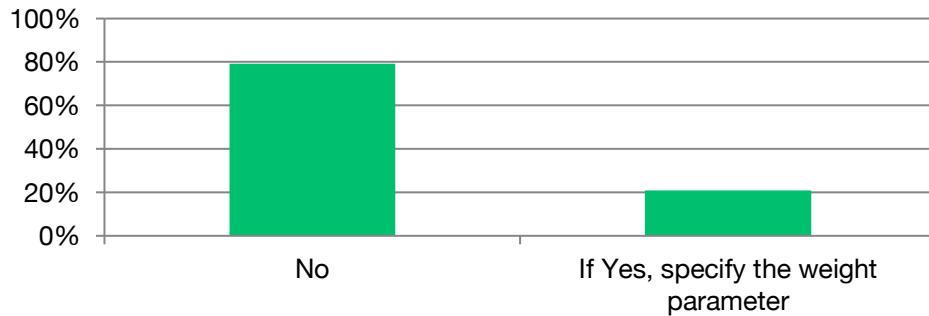
Does any domestic US move policy have limits on weight or cost?



A majority of corporations do not impose restrictions on either weight or costs of HHG shipments. The percentage of corporations in each of the two categories of restrictions is basically unchanged from prior years.

"SMALL SHIPMENT" PROGRAMS

Do you have a special "small shipment" program/policy. If yes, what is the weight parameter?



Seventy-nine percent (79%) of corporations do not have a small shipment program.

Among those 21% of companies with a special Small Shipment program/policy the most common weight limit was 5,000 lbs. The maximum weight ranged from 3,500# to a high maximum of 8,000 pounds.

SUPPLIERS' PERFORMANCE

OVERALL CARRIER PERFORMANCE

	1	2	3	4	5	Count	Aver	Percent
	1	2	3	4	5	Count	Aver	#5
Allied Worldwide	0	0	0	7	21	28	4.75	75.0%
Atlas Van Lines	0	0	0	41	29	70	4.41	41.4%
Budd Van Lines	0	0	0	8	24	32	4.75	75.0%
Mayflower	0	0	0	4	6	10	4.60	60.0%
New World Van Lines	0	0	0	9	13	22	4.59	59.1%
NorthAmerican	0	0	0	15	7	22	4.32	31.8%
United Van Lines	0	0	1	28	31	60	4.50	51.7%
Wheaton	0	0	0	5	4	9	4.44	44.4%
Other not listed	0	0	3	15	19	37	4.43	51.4%
	1	0	5	130	154	290	4.50	53.1%

This survey used a five-point scale to evaluate corporate managers' outlook on performance of carriers. Overall, the household goods industry earned high evaluations from managers.

Two carriers earned very high ratings. Budd Van Lines (an independent carrier) and Allied (brand of Sirva) outperformed all carriers earning the best average score and the highest percentage of top score.

Among multi-carrier brand entities Sirva brand (Allied and northAmerican), earned weighted evaluations ahead of the Unigroup (United and Mayflower) brand, the Atlas brand and the Wheaton brand.

Among the two evaluated independent brands Budd earned higher evaluations than New World.

SATISFACTION WITH RELOCATION MANAGEMENT COMPANY MANAGING HHG

R.M. C.	1	2	3	4	5	Total	Average	Perc. #5
Aires			2	4	4	10	4.20	40%
Altair Global Relo.				6	5	11	4.45	45%
Bristol Global Mobility				3	1	4	4.25	25%
Cartus		1	9	11	21		4.48	52%
Cornerstone Relo. Grp.			2	2	4		4.50	50%
Graebel				4	7	11	4.64	64%
NEI Relocation				3	3	6	4.50	50%
Plus Relocation				3	3	6	4.50	50%
RELO Direct					4	1	4.20	20%
SIRVA		1	10	21	32		4.63	66%

Sterling Lexicon	3	3	4.00	0%
Weichert Workforce Mobility	9	6	4.40	40%
Another RMC not listed	1	1	4.00	20%
	0	0	4.45	49%
	5	63	133	
		65		

With 85% 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 satisfaction average score to Graebel while Sirva earned a slightly higher percentage of top 5% ratings.