

TRIPPEL®



Relocating Employee Survey

Celebrating 50 years, Budd Van Lines continues its 20+ year streak as the top-rated van line for customer satisfaction.



**BUDD RANKED
HIGHEST**

**NET SATISFACTION
& TOP BLOCK SCORES**

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



Consistency is the hardest standard to meet in moving. Every home is different, every customer's expectations are unique, and every corporate client runs a distinct mobility program.

For 20+ consecutive years, Budd Van Lines has ranked at the top of the Trippel Reports, leading in both **Net Satisfaction and Top Block**. Our quality focus, driver team service model, and patented innovations make that consistency repeatable.

The most recent survey reflects input from **4,393 relocating employees**, representing 58 corporations, federal government entities, and nonprofit organizations.

Carrier	Surveys	Average Score	Top Block %	Bottom Block %	Net Satisfaction %
Allied Worldwide	584	8.39	44%	2%	43%
Atlas Van Lines	814	8.33	42%	2%	40%
Budd Van Lines	193	8.52	62%	2%	61%
Mayflower Van Lines	111	8.25	37%	4%	33%
NorthAmerican Van Lines	365	8.62	60%	1%	59%
United Van Lines	1147	8.4	45%	3%	43%
Other/Uncertain carriers	470	8.48	51%	6%	45%
Container services	44	8.25	48%	9%	39%
HHG Carriers & Containers (Total)	3728	8.41	47%	2%	45%

Thirty-first Annual
***Nationwide Relocating Employee Survey*®**
Results for 2025

Prepared by:
Trippel Survey & Research, LLC
July 2025

BACKGROUND INFORMATION

The 31st 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 (both homeowners and renters) 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 this 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 domestic US transferees or assignees.

The survey period accumulated opinions from 4393 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 five service categories due to low sample size.

CONFIDENTIALITY

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SURVEY RESULTS – INDUSTRIES’ OVERVIEW

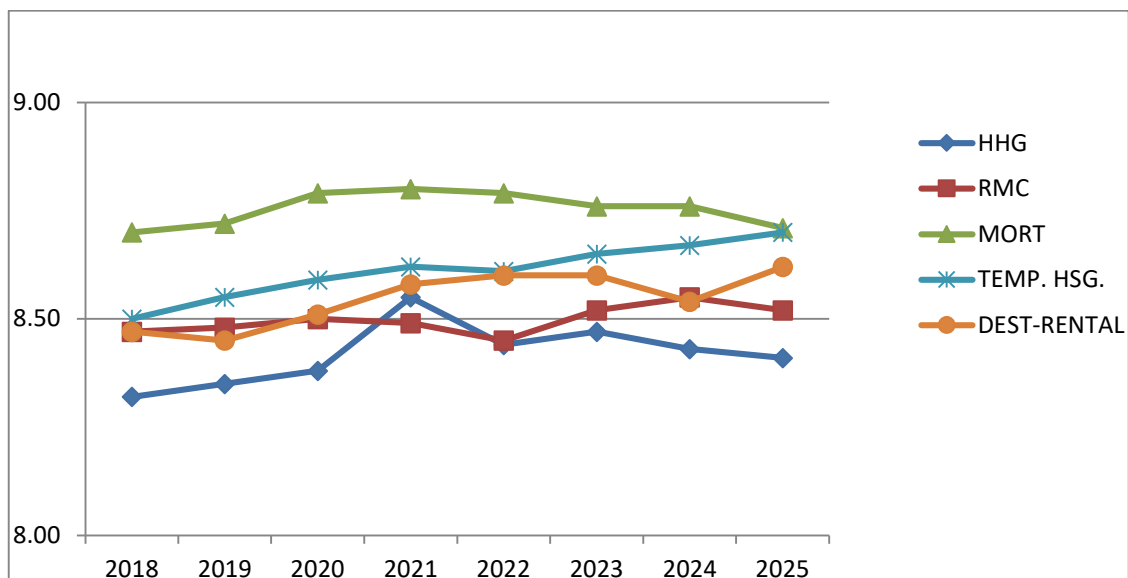
TRANSFeree & ASSIGNEE SATISFACTION

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	3728	8.41	47%	2%	45%
Relocation Mgmt.	4228	8.52	51%	1%	50%
Mortgage	1922	8.71	61%	2%	60%
Temporary Housing	3240	8.70	60%	1%	59%
Destination & Rental Svc.	1044	8.62	54%	1%	53%

CHANGES IN CUSTOMER SATISFACTION OVER RECENT 8 YEARS

The following graph shows the change in employees’ average score over an 8-year period starting 2018 through 2025. 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 2021 high.
- Customer satisfaction using the services of relocation management companies decreased from last year's all-time high.
- The customers evaluating the mortgage providers report a decrease in customer satisfaction average score.
- Customers using corporate temporary housing service providers report a continued and steady increase satisfaction.
- The customers using providers of destination-rental services also report a small increase in satisfaction over last year's survey.

Comparing these five industry scores from pre-COVID (years 2018, 2019) to post-COVID analysis (2022 and later) shows small incremental improvement in end-user satisfaction in all five industries.

New trends emerged in this survey.

- In Household Goods customers are reporting a small decrease in use of container services versus traditional HHG carriers.
- In the Relocation Management category use of three largest firms, based on this sampling, realized a small increase in customer utilization.
- Also, the spread in the RMC segment between the highest average score and the lowest increased this year compared to 2024.
- In the Relocation Mortgage category the number of evaluations dropped in this 2025 survey (although the overall survey sample size increased) compared to last year's survey. This trend is due to the increased ratio of renters moving into the new location versus home buyers.
- Further in the mortgage category the spread between the highest average score and the lowest increased this year compared to 2024.
- The number of evaluations recorded for the Temporary Housing sector increased significantly this year compared to last year.
- Similarly, the number of evaluations recorded for the Destination & Rental services sector increased significantly this year compared to last year.
- Overall the national year-to-year trend of fewer home sales, a housing shortage, an increase in real estate pricing and higher interest rates are impacting corporate relocation. This survey shows: renter moves are increasing and, accordingly, the services provided to this market segment is increasing.

Report continued next page

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 Other. The top chart of two shows the 6 carriers meeting the minimum sample size requirements, and Other and Container services (ex: PODS). 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	Aver.	Top	Bottom	Net
	1	2	3	4	5	6	7	8	9	10	Surveys	Score	Block %	Block %	Satis. %
Allied Worldwide				2	4	3	101	215	164	95	584	8.39	44%	2%	43%
Atlas Van Lines	1	1			3	8	191	272	176	162	814	8.33	42%	2%	40%
Budd Van Lines	1				1	1	33	37	94	26	193	8.52	62%	2%	61%
Mayflower Van Lines	1				2	1	17	49	22	19	111	8.25	37%	4%	33%
NorthAmerican Van Lines					3	1	63	79	137	82	365	8.62	60%	1%	59%
United Van Lines	2	1			17	9	205	394	289	230	1147	8.40	45%	3%	43%
Other or Uncertain carriers	2	1			15	8	85	121	86	152	470	8.48	51%	6%	45%
Container services	1				1	2	5	14	12	9	44	8.25	48%	9%	39%
HHG Carriers & Containers	8	3	0	2	46	33	700	1181	980	775	3728	8.41	47%	2%	45%
SIRVA Brand (NAVL, Allied)				2	7	4	164	294	301	177	949	8.48	50%	1%	49%
Unigroup Brand (United, Mayfl.)	3	1			19	10	222	443	311	249	1258	8.38	45%	3%	42%
Atlas	1	1			3	8	191	272	176	162	814	8.33	42%	2%	40%

The industry earned an average score of 8.41 from transferees/assignees and net satisfaction of 45%. Both metrics are slightly lower than the 2024 survey.

Among the six listed carriers northAmerican Van Lines earned the highest average score while **Budd Van Lines earned the highest net satisfaction percentage. Among all 6 large carriers shown above only Budd Van Lines realized an improvement (albeit small) from last year's survey.**

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 corporations. Small sampling is RMCs evaluated by dozens of end-user customers representing fewer than 5 companies. Smaller RMC (and there are many!) with s very small sampling are captured in the *All other* row in the 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.

	< Scores >										Total	Aver.	Top	Bottom	Net
Large sampling	1	2	3	4	5	6	7	8	9	10	Surveys	Score	Block %	Block %	Satis. %
Bristol Global Mobility					1		43	44	57	51	196	8.58	55%	1%	55%
Cartus					3	9	170	238	226	204	850	8.51	51%	1%	49%
Graebel					2	3	24	63	44	36	172	8.47	47%	3%	44%
NEI Global Relocation						2	22	87	76	51	238	8.64	53%	1%	53%
RELO Direct					1		22	69	54	31	177	8.51	48%	1%	47%
Sirva	1				2	6	181	212	227	181	810	8.47	50%	1%	49%
Weichert Workforce Mobility					1		82	151	176	121	531	8.63	56%	0%	56%
Large sampling suppliers >	1	0	0	0	10	20	544	864	860	675	2974	8.53	52%	1%	51%
Small sampling															
Aires						1	11	54	62	16	144	8.56	54%	1%	53%
Altair Global Relocation						1	28	78	56	44	207	8.55	48%	0%	48%
Cornerstone					1	1	20	68	34	33	157	8.48	43%	1%	41%
NuCompass					1		23	39	29	28	120	8.49	48%	1%	47%
Plus Relocation							19	49	59	22	149	8.56	54%	0%	54%
Sterling Lexicon						2	14	29	20	14	79	8.38	43%	3%	41%
All Other or unknown	1	1			3	3	96	165	166	107	542	8.47	50%	1%	49%
Small sampling suppliers >	1	1	0	0	5	7	200	428	364	248	1254	8.49	49%	1%	48%
All R.M.C.s	2	1	0	0	15	27	744	1292	1224	923	4228	8.52	51%	1%	50%

The industry earned an average score of 8.52 and net satisfaction of 50%. Both metrics are slightly lower than the 2024 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. Both suppliers earned these same successes in 2024. Bristol Global Mobility followed with very high grades in both metrics,

In the “small sampling” category Plus Relocation followed by Aires earned the highest metrics,

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. 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.

	< Scores >										Total	Average	Top	Bottom	Net
	1	2	3	4	5	6	7	8	9	10	Surveys	Score	Block %	Block %	Satis. %
Large sampling															
JP Morgan Chase							17	71	105	59	252	8.82	65%	0%	65%
Premia Relocation Mortgage					1	1	16	63	69	33	183	8.62	56%	1%	55%
PNC					2		11	35	27	38	113	8.76	58%	2%	56%
Rocket Mortgage						3	28	145	166	137	479	8.85	63%	1%	63%
Sirva Mortgage					1	2	19	36	55	34	147	8.66	61%	2%	59%
U.S. Bankcorp							18	38	67	43	166	8.81	66%	0%	66%
Weichert Financial					2		11	35	27	38	113	8.76	58%	2%	56%
Large sampling suppliers >	0	0	0	0	6	6	120	423	516	382	1453	8.78	62%	1%	61%
Small sampling															
Bank of America	1				3	1	8	26	30	22	91	8.53	57%	5%	52%
Huntington Bank					2		8	20	33	23	86	8.76	65%	2%	63%
loanDepot	4						6	10	8	11	39	7.90	49%	10%	38%
Rate	3				2		10	24	45	15	99	8.38	61%	5%	56%
Others not listed above	1				2	1	14	41	64	31	154	8.63	62%	3%	59%
Small sampling suppliers >	9	0	0	0	9	2	46	121	180	102	469	8.52	60%	4%	56%
All suppliers >	9	0	0	0	15	8	166	544	696	484	1922	8.71	61%	2%	60%

Evaluations in the relocation mortgage category are slightly lower than last year. Average score is 8.71 while net satisfaction percentage is 60%. Although customers of relocation mortgage providers express general satisfaction both metrics dropped from last year's survey.

Among the listed 6 suppliers in the large sampling segment Rocket Mortgage earned the highest average score while U.S. Bankcorp earned the highest net satisfaction. JP Morgan Chase also earned noteworthy second best pair of metrics.

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 corporations. 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.

Private Housing, a growing US industry, include such firms as VRBO, Airbnb, Vacasa and geneal private housing generated the second highest number of customer in this survey.

Global housing brands, such as Hilton and Marriot are reported in the “small sampling” category. Please note both brands added more users this year compared to the 2024 survey.

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

	< Scores >										Total	Aver.	Top	Bottom	Net
	1	2	3	4	5	6	7	8	9	10	Surveys	Score	Block %	Block %	Satis. %
Large sampling															
Extended Stay America					1	2	9	54	44	19	129	8.51	49%	2%	47%
National Corporate Hsg.						1	39	151	232	145	568	8.85	66%	0%	66%
Nomad Temporary Hsg.					1		22	87	91	97	298	8.87	63%	0%	63%
SIRVA Corporate Hsg.					1	1	27	54	77	59	219	8.74	62%	1%	61%
SuiteAmerica							42	65	122	55	284	8.67	62%	0%	62%
Weichert Corporate Hsg.					1	1	20	79	119	77	297	8.84	66%	1%	65%
Private housing					4	3	27	130	182	147	493	8.87	67%	1%	65%
Large sampling suppliers >	0	0	0	0	8	8	186	620	867	599	2288	8.80	64%	1%	63%
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		22	49	59	36	171	8.52	56%	3%	53%
Murphy's Corp. Housing	2				1	1	14	46	32	28	124	8.44	48%	3%	45%
Marriott brand	1				1	2	33	76	54	55	222	8.53	49%	2%	47%
All other or Unknown				1	2	1	26	58	37	20	145	8.27	39%	3%	37%
Small sampling suppliers >	6	0	0	2	12	8	137	310	297	180	952	8.44	50%	3%	47%
All suppliers >	6	0	0	2	20	16	323	930	1164	779	3240	8.70	60%	1%	59%

The average score this year is 8.70 for the corporate temporary housing category with a net satisfaction percentage of 59%. The industry average score is higher than the 2024 survey.

Among the listed suppliers in the large sampling segment Nomad Temporary Housing earned the highest average score while National Corporate Housing earned the highest net satisfaction percentage. Weichert Corporate Housing was close behind in the two metrics.

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	Aver.	Top	Bottom	Net
	1	2	3	4	5	6	7	8	9	10	Surveys	Score	Block %	Block %	Satis. %
Dwellworks					2		18	69	86	48	223	8.71	60%	1%	59%
National Corp. Hsg.					1	1	32	94	56	46	230	8.48	44%	1%	43%
PorchLight					2	1	31	58	54	45	191	8.55	52%	2%	50%
All Others incl RMC	1				1	2	36	133	129	98	400	8.69	57%	1%	56%
All suppliers >	1	0	0	0	6	4	117	354	325	237	1044	8.62	54%	1%	53%

The destination-rental services category realized a substantial increase in both average score and net satisfaction percentage compared to last year's survey results. The service category also grew by nearly 24% from last year.

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