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NATIONWIDE RELOCATING EMPLOYEE SURVEY

TRIPPEL



Twenty-ninth Annual
Nationwide Relocating Employee Survey®
Results for 2023

Prepared by:
Trippel Survey & Research, LLC
July 2023

BACKGROUND INFORMATION

The 29th annual *Nationwide Relocating Employee Survey* © was conducted throughout an eight month period ending June 30, 2022. 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 3715 transferees/assignees representing 53 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.

CONFIDENTIALITY

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SURVEY RESULTS – INDUSTRIES’ OVERVIEW

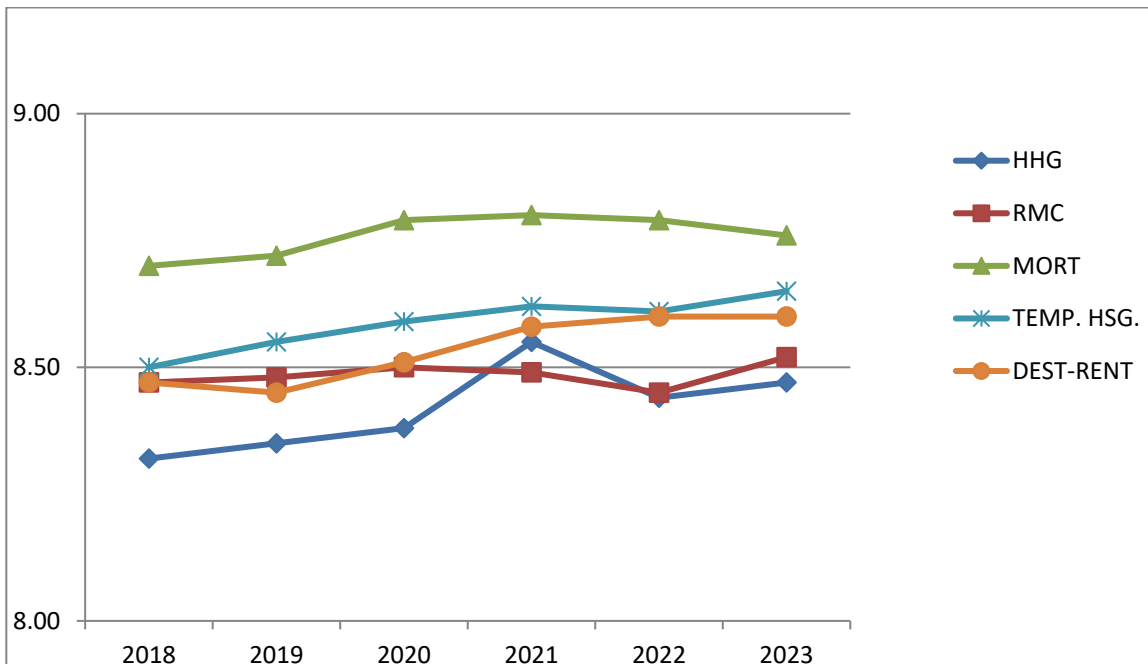
TRANSFEREE & ASSIGNEE SATISFACTION

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.

Industry	Number Evaluations	Average Score	Top Block	Bottom Block	Net Satisfaction
Household Goods	3642	8.47	49%	1%	48%
Relocation Mgmt.	3503	8.52	52%	1%	51%
Mortgage	2655	8.76	61%	1%	61%
Temporary Housing	3106	8.65	58%	1%	57%
Destination & Rental Svc.	770	8.60	52%	1%	51%

CHANGES IN CUSTOMER SATISFACTION OVER RECENT 6 YEARS

The following graph shows the change in employees’ average score over a 6-year period. 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 improved from last year but lower than prior year high,
- Customer satisfaction using the services of relocation management companies improved from last year reaching a six-year high but in a tight range over the multi-year period,
- The customers evaluating the mortgage providers report a downturn in satisfaction for the second consecutive year,
- Customer using corporate temporary housing service providers report a steady increase satisfaction, throughout much of the 6 year period and,
- The few end-user customers using providers of destination-rental services report a continuing steady, albeit slow, increase in satisfaction.

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.

Simply, 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.

HOUSEHOLD GOODS CATEGORY	< Scores >										Total Surveys	Aver. Score	Top Block %	Bottom Block %	Net Satis. %	
	1	2	3	4	5	6	7	8	9	10						
Large sampling																
Allied Worldwide	1				3		113	195	155	81	548	8.34	43%	1%	42%	
Atlas Van Lines		1			4	1	175	251	190	168	790	8.42	45%	1%	45%	
Budd Van Lines					3		36	49	72	41	201	8.54	56%	1%	55%	
Mayflower Van Lines	1				2		19	52	28	24	126	8.37	41%	2%	39%	
northAmerican Van Lines	1	1			1	1	61	80	139	79	363	8.60	60%	1%	59%	
United Van Lines	2				1		193	377	281	222	1076	8.48	47%	0%	46%	
Other or Unidentified carriers	4	1		1	6	5	82	118	86	152	455	8.53	52%	4%	49%	
Container services							4	26	26	27	83	8.92	64%	0%	64%	
HHG Carriers & Containers	9	3	0	1	17	10	683	1148	977	794	3642	8.47	49%	1%	48%	
SIRVA Brand	2	1			4	1	174	275	294	160	911	8.45	50%	1%	49%	
UniGroup Brand	3				0	3	212	429	309	246	1202	8.47	46%	0%	46%	
Atlas		1			4	1	175	251	190	168	790	8.42	45%	1%	45%	

The industry earned an average score of 8.47 from transferees/assignees and net satisfaction of 48%. Both metrics are slightly higher than the 2022 survey.

Among the six listed carriers northAmerican Van Lines earned the highest average score and largest net satisfaction percentage. **Budd Van Lines was earned the second highest metrics.**

A few carriers are combined with their corporate brand: SIRVA brand includes Allied Worldwide and northAmerican Van Lines; UniGroup brand includes United Van Lines and Mayflower Van Lines. Atlas stands on its own. Among the three largest HHG entities the UniGroup brand earned the slightly highest average score while the SIRVA brand earned a slightly highest net satisfaction percentage. All three entities are very close to each other in customer satisfaction.

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.

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.

RELOCATION MANAGEMENT Cos.	< Scores >										Total Surveys	Aver. Score	Top Block %	Bottom Block %	Net Satis. %
	1	2	3	4	5	6	7	8	9	10					
Large sampling															
Altair Global Relocation					1	1	15	56	32	41	146	8.64	50%	1%	49%
Bristol Global Mobility							25	36	28	32	121	8.55	50%	0%	50%
Cartus				1	2		137	166	182	131	619	8.48	51%	0%	50%
Graebel					1	1	9	37	33	23	104	8.63	54%	2%	52%
NEI Global Relocation						1	9	46	52	22	130	8.65	57%	1%	56%
SIRVA (+ BGRS)	3				1	3	144	164	201	135	651	8.46	52%	1%	51%
Weichert Workforce Mobility					1	1	81	91	133	108	415	8.63	58%	0%	58%
Large sampling suppliers >	3	0	0	1	6	7	420	596	661	492	2186	8.53	53%	1%	52%
Small sampling															
Aires						1	11	45	55	13	125	8.54	54%	1%	54%
Cornerstone					2		16	51	27	44	140	8.66	51%	1%	49%
NuCompass					1	1	23	29	27	35	116	8.59	53%	2%	52%
Plus Relocation							24	37	54	21	136	8.53	55%	0%	55%
RELO Direct						1	22	46	42	30	141	8.55	51%	1%	50%
All Other or unknown	1	1			5	6	146	177	191	132	659	8.41	49%	2%	47%
Small sampling suppliers >	1	1	0	0	9	8	242	385	396	275	1317	8.49	51%	1%	50%
All R.M.C.s	4	1	0	1	15	15	662	981	1057	767	3503	8.52	52%	1%	51%

The industry earned an average score of 8.52 and net satisfaction of 51%. Both metrics are higher than the 2022 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.

All five suppliers' evaluated in the "small sampling" category did not meet the 5 or more client requirement. Among these 5 RMCs Cornerstone earned a high average score while Plus Relocation a high net satisfaction percentage.

There is a small delta in sampled customer satisfaction. The high and low average score difference is slight (0.15) and slightly higher difference using net satisfaction percentage (7 percentage points).

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 and representing a minimum of 5 different companies. Small sampling is mortgage suppliers evaluated by 99 or fewer end-user customers representing and/or fewer than 5 companies. 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.

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.

MORTGAGE CATEGORY

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					1	2	29	77	61	56	226	8.61	52%	1%	50%
Premia Relocation Mortgage					2		13	53	54	49	171	8.78	60%	1%	59%
PNC Bank							14	51	22	37	124	8.66	48%	0%	48%
Rocket Mortgage					2		39	133	185	133	492	8.83	65%	0%	64%
SIRVA Mortgage							20	28	51	32	131	8.73	63%	0%	63%
U.S. Bancorp						1	20	28	63	42	154	8.81	68%	1%	68%
Wells Fargo Home Mort.					1		82	176	299	201	759	8.81	66%	0%	66%
Others not listed above							17	37	16	29	99	8.58	45%	0%	45%
Large sampling suppliers >	0	0	0	0	6	3	234	583	751	579	2156	8.77	62%	0%	61%
Small sampling															
Bank of America					1	13	26	27	29	96	96	8.73	58%	1%	57%
Citizens Bank	1				1	12	25	17	22	78	78	8.51	50%	3%	47%
Guaranteed Rate		1			1	12	23	45	15	97	97	8.57	62%	2%	60%
Huntington Bank		1			1	5	17	22	41	87	87	9.05	72%	2%	70%
PNC Bank					1	11	14	9	16	51	51	8.53	49%	2%	47%
Weichert Financial						3	32	28	27	90	90	8.88	61%	0%	61%
Small sampling suppliers >	1	2	0	0	1	4	56	137	148	150	499	8.73	60%	2%	58%
All suppliers >	1	2	0	0	7	7	290	720	899	729	2655	8.76	61%	1%	61%

Evaluations in the relocation mortgage category are lower than last year. Average score is 8.76 while net satisfaction percentage is 61%.

Among the listed 7 suppliers in the large sampling segment Rocket Mortgage earned the highest average score and US Bank Corp. the highest net satisfaction percentage. Wells Fargo Home Mortgage earned the second highest pair of metrics.

In the small sampling segment Huntington Bank earned metrics higher than all “small sampling” competitors with Weichert Financial close behind.

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 mortgage 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.

This is the first year private housing spaces were captured and evaluated.

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

TEMPORARY HOUSING CATEGORY	< Scores >										Total Surveys	Aver. Score	Top Block %	Bottom Block %	Net Satis. %
	1	2	3	4	5	6	7	8	9	10					
Large sampling															
Extended Stay America					2		16	33	35	25	111	8.57	54%	2%	52%
Murphy's Corp. Housing	2				1	4	39	78	81	66	271	8.55	54%	3%	52%
National Corporate Hsg.				1		1	90	162	223	175	652	8.73	61%	0%	61%
Nomad Temporary Hsg.					1	1	18	84	52	73	229	8.76	55%	1%	54%
SIRVA Corporate Hsg.					2		35	48	46	41	172	8.51	51%	1%	49%
Synergy Global Housing							20	43	37	21	121	8.49	48%	0%	48%
SuiteAmerica		1			1	1	44	73	131	65	316	8.65	62%	1%	61%
Weichert Corporate Hsg.					1	3	49	54	109	64	280	8.64	62%	1%	60%
Large sampling suppliers >	2	1	0	1	8	10	311	575	714	530	2152	8.65	58%	1%	57%
Small sampling															
Ascot Brand (Oakwood, ExecStay)	1						19	28	31	26	105	8.54	54%	1%	53%
Bridgestreet Global	1				1	1	9	22	33	9	76	8.39	55%	4%	51%
Churchill					3		18	14	41	18	94	8.53	63%	3%	60%
Hilton Brand					2		7	19	52	14	94	8.71	70%	2%	68%
Korman brand							8	15	13	9	45	8.51	49%	0%	49%
Marriott brand	1				2		57	75	58	66	259	8.46	48%	1%	47%
Private Hsg (Ex: airbnb, vrbo)	1	1			3	2	4	72	101	97	281	8.94	70%	2%	68%
Small sampling suppliers >	4	1	0	0	11	3	122	245	329	239	954	8.64	60%	2%	58%
All suppliers >	6	2	0	1	19	13	433	820	1043	769	3106	8.65	58%	1%	57%

The average score this year is 8.65 for the corporate temporary housing category with a net satisfaction percentage of 57%. Both metrics are slightly higher than the 2022 survey.

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

In the small sampling segment the Hilton Brand of temporary housing suppliers earned metrics higher than all "small" competitors.

Please note, with more than 25% of corporations permitting assignees or transferees to use 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.

DESTINATION & RENTAL SERVICES CATEGORY

	< Scores >										Total	Aver.	Top	Bottom	Net
	1	2	3	4	5	6	7	8	9	10	Surveys	Score	Block %	Block %	Satis. %
Dwellworks					1		13	53	56	37	160	8.71	58%	1%	58%
Go Destination							5	37	22	16	80	8.61	48%	0%	48%
National Corp. Hsg.						2	20	63	41	37	163	8.56	48%	1%	47%
PorchLight							19	52	37	31	139	8.58	49%	0%	49%
Others	1				1	2	36	62	71	55	228	8.57	55%	2%	54%
All suppliers >	1	0	0	0	2	4	93	267	227	176	770	8.60	52%	1%	51%

The destination-rental services category realized a small 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.

Go Destination is a new supplier captured in this survey.