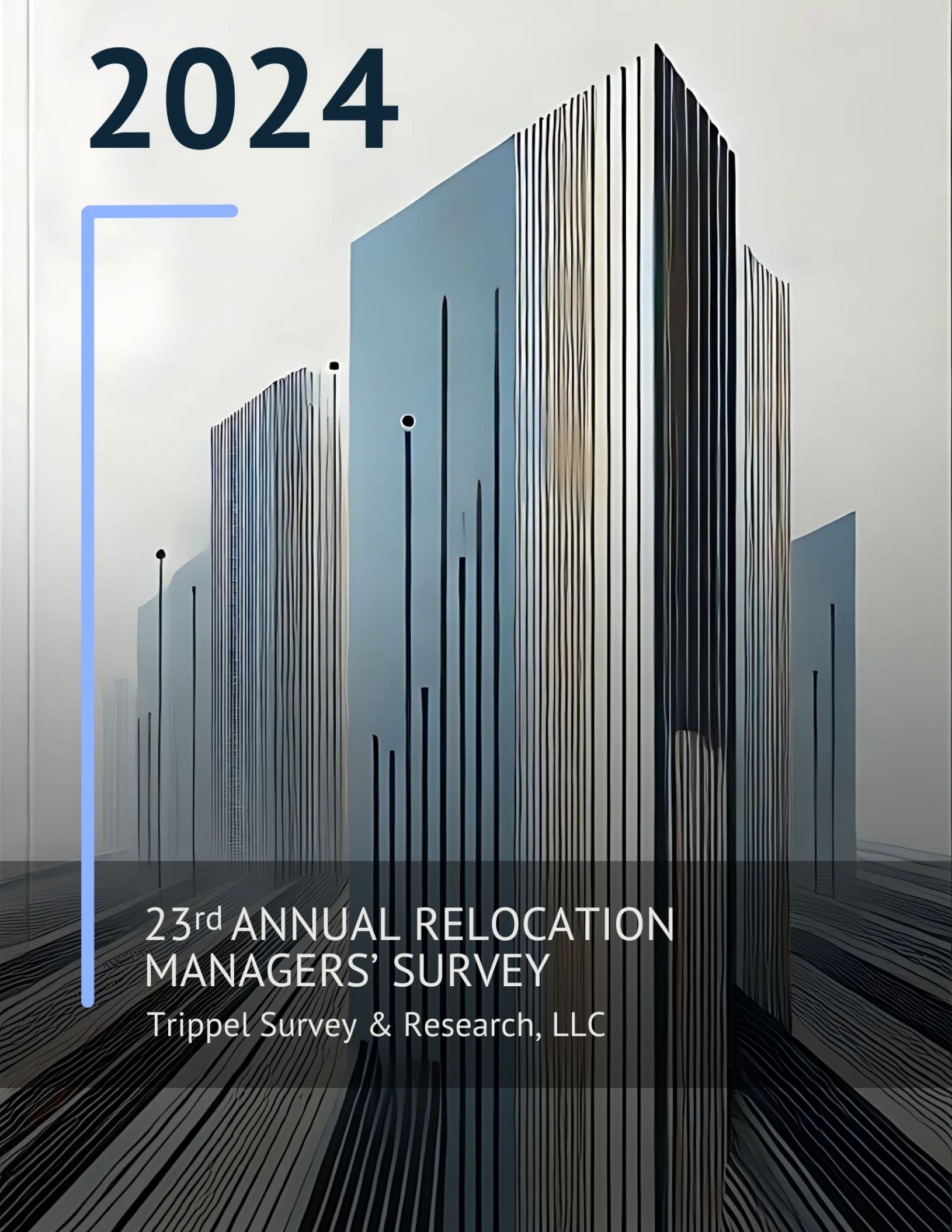


# 2024

An abstract architectural illustration of a city street. The scene features tall, thin, rectangular buildings with a textured, metallic appearance. The buildings are arranged in a perspective that leads the eye down a street. The sky is a pale, hazy blue. In the foreground, there are dark, wavy lines representing a road or water. A bright blue L-shaped line is positioned on the left side of the image, framing the text.

## 23<sup>rd</sup> ANNUAL RELOCATION MANAGERS' SURVEY

Trippel Survey & Research, LLC

# 23<sup>rd</sup> ANNUAL RELOCATION MANAGERS' SURVEY©

## RELOCATION MANAGEMENT COMPANIES

OCTOBER 2024

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### BACKGROUND

The purpose of this survey is to obtain performance evaluations from corporate relocation managers regarding their level of satisfaction with firms in the US relocation management services industry.

### METHODOLOGY

This survey utilized *SurveyMonkey* to distribute, collect and report survey results. The survey was launched September 24, 2024. There were 1,277 email invites of which 9 bounced. Over the course of nearly three weeks there were 262 survey participants. This is an 8% increase from last year's survey.

### CONFIDENTIALITY

Trippel Survey & Research, LLC maintains strict confidentiality of the corporations who participated. This confidential report and a marketing license was purchased by NEI Global Relocation and may be shared among internal employees, external stakeholder and for promotion according to the terms of the license.

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### DISCLAIMER

Since the last survey on this topic one year ago **no** relocation management company engaged Trippel Survey & Research, LLC in survey, consulting or research assignments.

## REPORT INDEX

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| EXPLANATION, DEFINITIONS AND RMC SURVEY SHARE | 6 - 7       |
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## EXECUTIVE SUMMARY

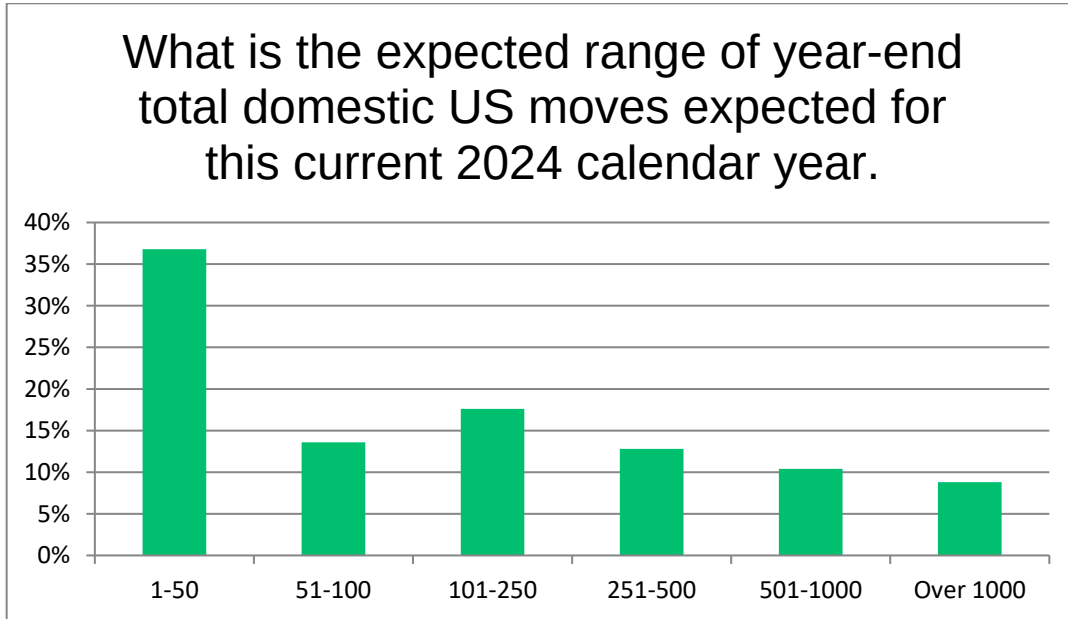
1. 262 valid surveys were recorded plus 1 manager stating they are “in house.”
2. 4.2% of corporations changed relocation management companies (RMC) in the last 12 months. However, 18% stated they might conduct a supplier review in 2025.
3. This large percentage of expected supplier reviews might be due to the duration of contract length corporate managers have with their current supplier. Nearly 40% of corporations have been using the same RMC for 10 years or longer and another 24% are in at least the 6 years of their contract. This combined 64% duration figure is larger than past recent surveys.
4. Slightly more than one-half of respondents’ state overall performance of their supplier “was the same” over the last year. More than a third of respondents stated overall performance improved somewhat over the last year while 5% state performance has taken a turn for the worse.
5. This year a 7-point scale was used to evaluate “overall” performance. The industry-wide average is 6.16 (7 top).
6. Sirva recorded the most surveys in this updated 2024 study.

## SURVEY RESPONDENT PROFILE & INDUSTRY TRENDS

### RESPONDENTS

This year 263 corporate managers participated in the annual survey. One manager stated they do not use the services of a relocation management company (RMC) and, therefore, was excluded from the survey outcomes. The reports reflect the 262 corporations using an RMC.

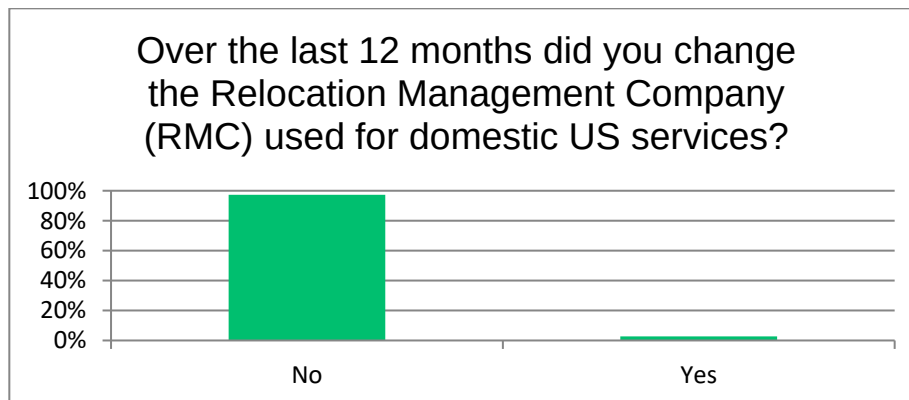
### RANGE OF DOMESTIC US MOVES EXPECTED IN CALENDAR 2024



Corporate managers indicated the range of domestic volume expected year-end 2024.

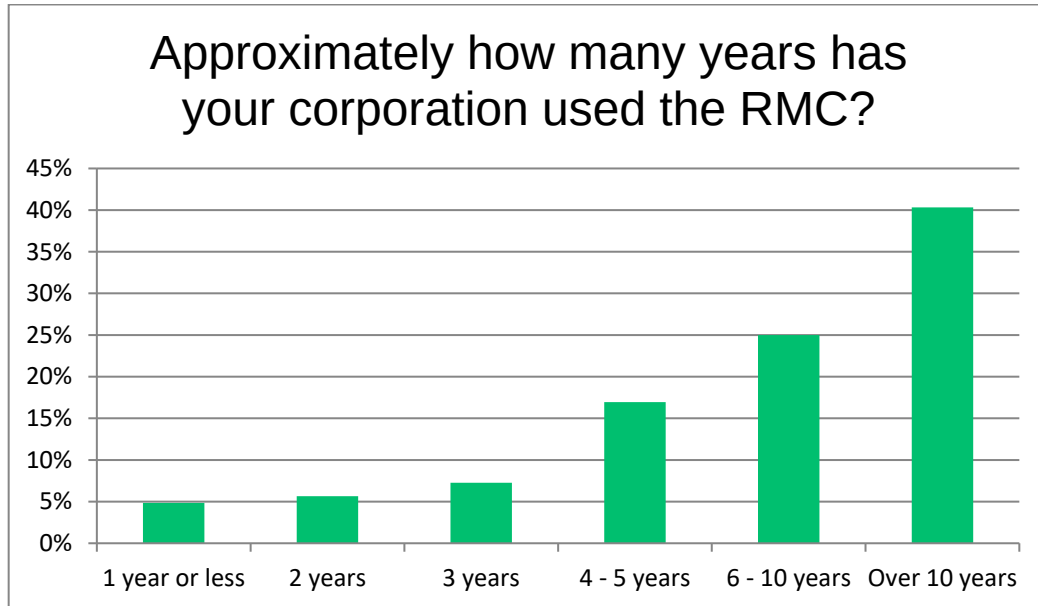
Most respondents move less than 100 employees annually.

### SUPPLIER CHANGES DURING 2024



Only 4% of corporations changed the RMC this current year. This is consistent with past years.

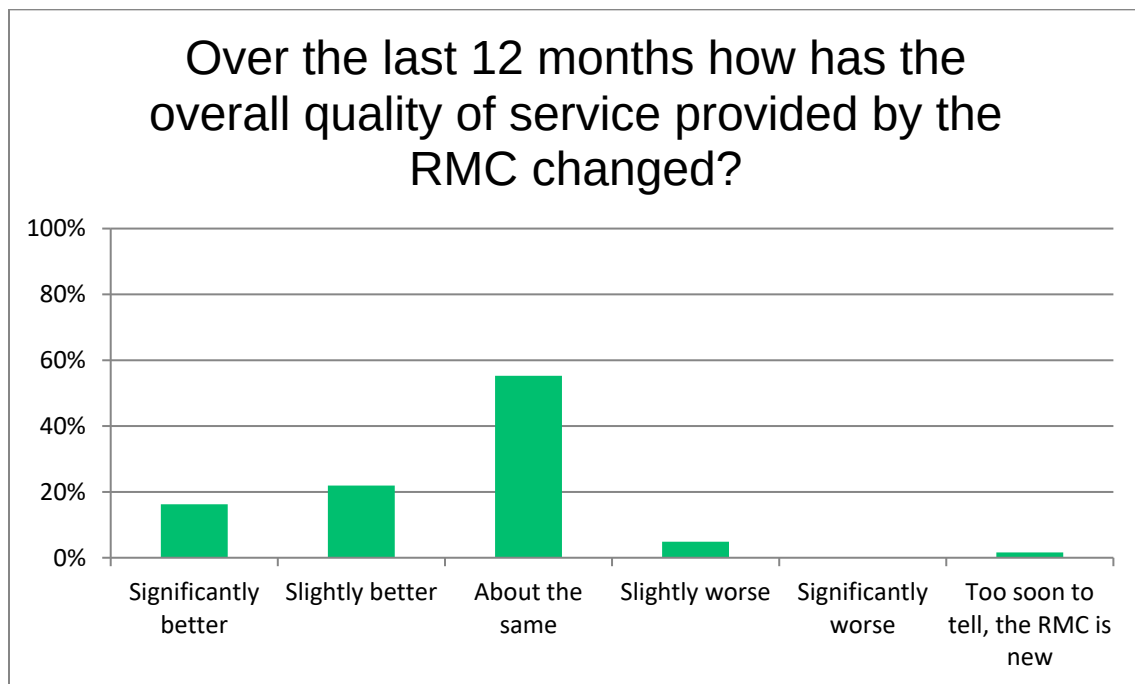
## DURATION OF CURRENT CORPORATE-SUPPLIER CONTRACT



Sixty-five percent (65%) of corporations indicate the contractual relationship with their current supplier is six year or older. This is the highest utilization rate in these two upper combined ranges over the past few surveys.

Clearly the trend is for corporations to use the contracted RMC for an extended duration.

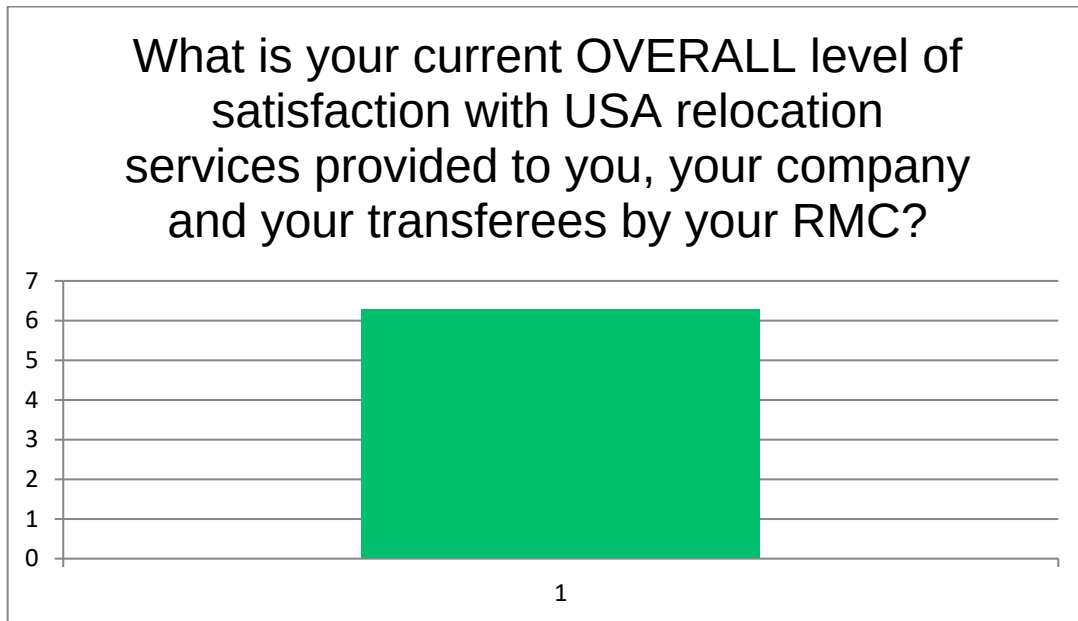
## CHANGE IN SUPPLIER PERFORMANCE FROM LAST YEAR



The chart reveals 38% of managers realized an improvement in service this year compared to the prior year. This is up 4 points from last year – continuing a 3 year upward trend.

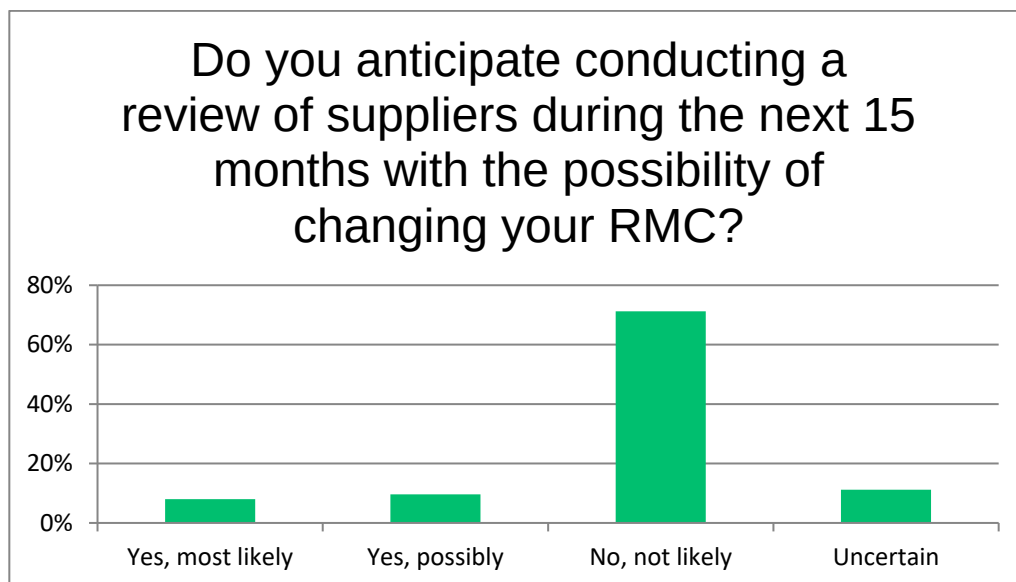
#### SATISFACTION WITH SUPPLIER'S OVERALL PERFORMANCE

This year, for the first time, a 7-point scale (7 high) rather than the 10-point scale used previously.



The many suppliers reflected in this survey earned an aggregate rating on the seven-point scale of 6.16.

#### LIKELIHOOD OF CONDUCTING A SUPPLIER REVIEW IN 2025



As the chart shows nearly 70% of corporate managers indicate there is varying degrees of NO likelihood of conducting a review of RMC suppliers in 2025. This rate is the highest rate of “not likely” over the past few years. The slow improvement over many years in overall satisfaction noted earlier reduces any urgency to change RMC suppliers. The long-term duration of contracts might be the only factor motivating a review.

## EXPLANATIONS, DEFINITIONS AND SURVEY SHARE

Twenty-seven service firms were evaluated. The report, from this point to the end, identifies nine service firms, each having 10 or more client evaluations provided by corporate managers. Eighteen suppliers are not displayed in the charts due to the low sampling (9 or less). The evaluations regarding these smaller sample-size service companies are combined and included in the “*All 18 other service firms*” category.

## **RELOCATION MANAGEMENT COMPANY 2024 SURVEY-SHARE**

| SUPPLIER                      | 2024<br>EVALUATIONS | % SHARE      |
|-------------------------------|---------------------|--------------|
| SIRVA                         | 45                  | 17.2%        |
| Graebel                       | 31                  | 11.8%        |
| Cartus                        | 26                  | 9.9%         |
| Bristol Global Mobility       | 22                  | 8.4%         |
| RELO Direct                   | 19                  | 7.3%         |
| NEI Global Relocation         | 18                  | 6.9%         |
| Weichert Workforce Mobility   | 17                  | 6.5%         |
| Aires                         | 15                  | 5.7%         |
| Altair Global Relocation      | 15                  | 5.7%         |
| <b>LARGER SIZE TOTAL &gt;</b> | <b>208</b>          | <b>79.4%</b> |
| Plus Relocation               | 7                   | 2.7%         |
| NuCompass Mobility            | 5                   | 1.9%         |
| Cornerstone Relo. Group       | 4                   | 1.5%         |
| Global Mobility Solutions     | 4                   | 1.5%         |
| Sterling Lexicon              | 4                   | 1.5%         |
| WHR Group                     | 4                   | 1.5%         |
| ARC Relocation                | 3                   | 1.1%         |
| CapRelo                       | 3                   | 1.1%         |
| CRI                           | 3                   | 1.1%         |
| Move Center                   | 3                   | 1.1%         |
| XONEX                         | 3                   | 1.1%         |
| Focus Relocation              | 2                   | 0.8%         |
| MSI Global Talent             | 2                   | 0.8%         |
| Santa Fe Relocation           | 2                   | 0.8%         |
| TRC Global Mobility           | 2                   | 0.8%         |
| LSS Relocation                | 1                   | 0.4%         |



|                               |            |               |
|-------------------------------|------------|---------------|
| NRI Relocation                | 1          | 0.4%          |
| Onesource Relocation          | 1          | 0.4%          |
| <b>SMALLER SIZE TOTAL&gt;</b> | <b>54</b>  | <b>20.6%</b>  |
| <b>GRAND TOTAL&gt;</b>        | <b>262</b> | <b>100.0%</b> |

Sirva's 17.2% survey-share is the largest in this survey. This is the first year Sirva had more evaluations posted than Cartus.

**Finally**, as a reminder only the nine "large sampling" suppliers are named and evaluated.

## RELOCATION COMPANY PERFORMANCE

### OVERALL SATISFACTION

A new seven-point scale was used this year.

| SUPPLIER                    | 1 | 2 | 3 | 4 | 5  | 6   | 7   | #   | AVER | TOP %<br>(6&7) | LOWER<br>%<br>(1-4) | NET<br>SATIS. |
|-----------------------------|---|---|---|---|----|-----|-----|-----|------|----------------|---------------------|---------------|
| Aires                       |   |   |   |   | 2  | 4   | 9   | 15  | 6.47 | 87%            | 0%                  | 87%           |
| Altair Global               |   |   |   | 1 | 2  | 5   | 7   | 15  | 6.20 | 80%            | 7%                  | 73%           |
| Bristol Global Mobility     |   |   |   |   | 2  | 11  | 9   | 22  | 6.32 | 91%            | 0%                  | 91%           |
| Cartus                      |   |   |   | 2 | 9  | 5   | 10  | 26  | 5.88 | 58%            | 8%                  | 50%           |
| Graebel                     |   |   |   | 1 | 4  | 13  | 13  | 31  | 6.23 | 84%            | 3%                  | 81%           |
| NEI Global Relocation       |   |   |   |   | 1  | 5   | 12  | 18  | 6.61 | 94%            | 0%                  | 94%           |
| RELO Direct                 |   |   |   |   | 2  | 7   | 10  | 19  | 6.42 | 89%            | 0%                  | 89%           |
| SIRVA                       |   |   |   | 1 | 8  | 28  | 8   | 45  | 5.96 | 80%            | 2%                  | 78%           |
| Weichert Workforce Mobility |   |   |   | 1 | 2  | 7   | 7   | 17  | 6.18 | 82%            | 6%                  | 76%           |
| Other                       |   |   |   | 3 | 10 | 25  | 16  | 54  | 6.00 | 76%            | 6%                  | 70%           |
|                             | 0 | 0 | 0 | 9 | 42 | 110 | 101 | 262 | 6.16 | 81%            | 3%                  | 77%           |

The industry **Overall** performance average is 6.16. There is no comparison to the prior survey due to the change in scale used by corporate managers to evaluate suppliers.

NEI Global achieved the highest pair of metrics. Bristol Global Mobility earned the second highest Net Satisfaction percentage while Aires earned the second highest average score. RELO Direct had third highest pair of metrics.

**WILLING TO RECOMMEND THE R.M.C.:** The degree to which a corporate manager voluntarily (when permitted by corporate policy) is highly willing to recommend a supplier to another relocation professional.

| SUPPLIER.               | Score > | HIGH<br>WILLINGNESS | WILLING<br>WITH CAVEATS | NOT<br>WILLING | #  | AVER | % HIGH<br>WILLING |
|-------------------------|---------|---------------------|-------------------------|----------------|----|------|-------------------|
| Aires                   |         | 11                  | 4                       | 0              | 15 | 1.73 | 73%               |
| Altair Global           |         | 10                  | 5                       | 0              | 15 | 1.67 | 67%               |
| Bristol Global Mobility |         | 19                  | 3                       | 0              | 22 | 1.86 | 86%               |
| Cartus                  |         | 14                  | 12                      | 0              | 26 | 1.54 | 54%               |
| Graebel                 |         | 24                  | 7                       | 0              | 31 | 1.77 | 77%               |



|                             |     |    |   |     |      |      |
|-----------------------------|-----|----|---|-----|------|------|
| NEI Global Relocation       | 18  | 0  | 0 | 18  | 2.00 | 100% |
| RELO Direct                 | 15  | 4  | 0 | 19  | 1.79 | 79%  |
| SIRVA                       | 34  | 11 | 0 | 45  | 1.76 | 76%  |
| Weichert Workforce Mobility | 15  | 2  | 0 | 17  | 1.88 | 88%  |
| Other                       | 39  | 12 | 3 | 54  | 1.67 | 72%  |
|                             | 199 | 60 | 3 | 262 | 1.75 | 76%  |

The industry average score was 1.75 on **Willingness to Recommend** and 76% was the “high willingness” outcome. Many suppliers exceeded 70% High Willingness to Recommend.

Using this simple 3-point scale NEI Global Relocation earned the highest set of metrics regarding **Willingness to Recommend**. Weichert Workforce Mobility earned the second highest set of evaluations. Bristol Global Mobility not far behind.

#### **CONTINUATION OF SERVICES: Likelihood the corporate client continues to use the supplier one year from now.**

| SUPPLIER                    | NEAR<br>CERTAINTY | UNSURE<br>BUT<br>LIKELY | VERY<br>UNLIKELY | #   | % NEAR<br>CERTAINTY |
|-----------------------------|-------------------|-------------------------|------------------|-----|---------------------|
| Aires                       | 9                 | 6                       | 0                | 15  | 60%                 |
| Altair Global               | 8                 | 7                       | 0                | 15  | 53%                 |
| Bristol Global Mobility     | 16                | 6                       | 0                | 22  | 73%                 |
| Cartus                      | 14                | 12                      | 0                | 26  | 54%                 |
| Graebel                     | 15                | 16                      | 0                | 31  | 48%                 |
| NEI Global Relocation       | 13                | 5                       | 0                | 18  | 72%                 |
| RELO Direct                 | 11                | 8                       | 0                | 19  | 58%                 |
| SIRVA                       | 20                | 23                      | 2                | 45  | 44%                 |
| Weichert Workforce Mobility | 8                 | 9                       | 0                | 17  | 47%                 |
| Other                       | 23                | 25                      | 6                | 54  | 43%                 |
|                             | 137               | 117                     | 8                | 262 | 52.3%               |

A similar 3-point evaluation scale is used in this question. The industry **Continuation of Services** measuring “Near Certainty” is 52.3%.

Among the 9 listed suppliers Bristol Global Mobility had the highest “near certainty” percentage followed by NEI Global. Both exceed 70 “Near Certainty” of continuing to use the supplier’s services. Aires was next (at 60%) and was the only other supplier at or exceeding 60%.

#### **CATEGORIZING THE RMC’s PERFORMANCE**

Corporate clients were asked to select a phrase to describing the supplier’s performance. Each label is assigned a score for measurement, the higher the score the better.

- > Best in Class – This RMC sets the standard for others to follow = 5 points
- > Excellent – Consistently meets all our standards of performance  
with only an occasional break down = 4 points
- > Good – Many but not all standards of performance are fulfilled = 3 points
- > Mediocre – Most functions and processes need improvement = 2 points

> Extremely poor – time for a change to a new service provider = 1 point

|                             | BEST-IN-CLASS | EXCELLENT | GOOD | MEDIOCRE | EXT. POOR |       |       | %        |
|-----------------------------|---------------|-----------|------|----------|-----------|-------|-------|----------|
|                             | 5             | 4         | 3    | 2        | 1         | Total | Aver. | Exc.+BIC |
| Aires                       | 8             | 5         | 2    |          |           | 15    | 4.40  | 87%      |
| Altair Global               | 6             | 5         | 3    | 1        |           | 15    | 4.07  | 73%      |
| Bristol Global Mobility     | 7             | 15        |      |          |           | 22    | 4.32  | 100%     |
| Cartus                      | 7             | 12        | 6    | 1        |           | 26    | 3.96  | 73%      |
| Graebel                     | 7             | 22        | 1    | 1        |           | 31    | 4.13  | 94%      |
| NEI Global Relocation       | 10            | 8         |      |          |           | 18    | 4.56  | 100%     |
| RELO Direct                 | 11            | 7         | 1    |          |           | 19    | 4.53  | 95%      |
| SIRVA                       | 16            | 15        | 14   |          |           | 45    | 4.04  | 69%      |
| Weichert Workforce Mobility | 8             | 8         | 1    |          |           | 17    | 4.41  | 94%      |
| Other                       | 18            | 29        | 5    | 2        |           | 54    | 4.17  | 87%      |
|                             | 98            | 126       | 33   | 5        | 0         | 262   | 4.21  | 85%      |

The industry earned an average score in **Categorizing Performance** of 4.21. This is slightly higher than last year's score of 4.20 on the same 5-point scale. This metric reinforces why so few corporations are considering changing suppliers in 2025.

There are two distinct measurements used to evaluate success. The simplest is arithmetic average. Using this metric the NEI Global, RELO Direct and Weichert Workforce Mobility had the three best achievements.

The other measurement is evaluating using “Best in Class” and “Excellent” percentages. Aggregating these two show a different set of high performers: Bristol Global and NEI highest. An additional 3 suppliers exceeded 90% top two ratings: Graebel, RELO Direct and Weichert.

## PERFORMANCE BASED ON SPECIFIC ATTRIBUTES

The next ten specific attributes are presented in the same order as reported in the summer 2024 report of attributes corporate managers find to be the most critical. The most critical attribute listed first followed by the next highest ranked nine attributes. For copies of this special report are available at a small fee.

The scale was simplified in this section to a 5-point scale from the previous surveys' 10-point scale.

### **QUALITY: Consistent high standards of performance**

|                         | Fail | Poor | Mediocre | V.Good | Outstanding |    |      | %           |
|-------------------------|------|------|----------|--------|-------------|----|------|-------------|
| SUPPLIER                | 1    | 2    | 3        | 4      | 5           | #  | AVER | Outstanding |
| Aires                   |      |      | 1        | 5      | 9           | 15 | 4.53 | 60%         |
| Altair Global           |      |      | 1        | 9      | 5           | 15 | 4.27 | 33%         |
| Bristol Global Mobility |      |      |          | 11     | 11          | 22 | 4.50 | 50%         |
| Cartus                  |      |      | 3        | 15     | 8           | 26 | 4.19 | 31%         |
| Graebel                 |      | 1    |          | 21     | 9           | 31 | 4.23 | 29%         |
| NEI Global Relocation   |      |      |          | 4      | 14          | 18 | 4.78 | 78%         |
| RELO Direct             |      |      |          | 6      | 13          | 19 | 4.68 | 68%         |

|                             |   |   |    |     |     |     |      |     |
|-----------------------------|---|---|----|-----|-----|-----|------|-----|
| SIRVA                       |   |   | 2  | 31  | 12  | 45  | 4.22 | 27% |
| Weichert Workforce Mobility |   |   | 1  | 7   | 9   | 17  | 4.47 | 53% |
| Other                       |   |   | 2  | 25  | 27  | 54  | 4.46 | 50% |
|                             | 0 | 1 | 10 | 134 | 117 | 262 | 4.40 | 45% |

The industry earned an average score in **Quality** of 4.40 with 45% of evaluations evaluated as “Outstanding.”

NEI Global earned the highest metrics followed closely by RELO Direct and Aires.

### **DATA SECURITY: technology and infrastructure to keep client data private and secure**

|                             | Fail | Poor | Mediocre | V.Good | Outstanding |     |      | %           |
|-----------------------------|------|------|----------|--------|-------------|-----|------|-------------|
| SUPPLIER                    | 1    | 2    | 3        | 4      | 5           | #   | AVER | Outstanding |
| Aires                       |      |      |          | 4      | 11          | 15  | 4.73 | 73%         |
| Altair Global               |      |      |          | 6      | 9           | 15  | 4.60 | 60%         |
| Bristol Global Mobility     |      |      |          | 12     | 10          | 22  | 4.45 | 45%         |
| Cartus                      |      |      |          | 11     | 15          | 26  | 4.58 | 58%         |
| Graebel                     |      |      | 1        | 12     | 18          | 31  | 4.55 | 58%         |
| NEI Global Relocation       |      |      |          | 6      | 12          | 18  | 4.67 | 67%         |
| RELO Direct                 |      |      |          | 8      | 11          | 19  | 4.58 | 58%         |
| SIRVA                       | 1    | 1    | 9        | 26     | 8           | 45  | 3.87 | 18%         |
| Weichert Workforce Mobility |      |      |          | 8      | 9           | 17  | 4.53 | 53%         |
| Other                       |      |      | 3        | 30     | 21          | 54  | 4.33 | 39%         |
|                             | 1    | 1    | 13       | 123    | 124         | 262 | 4.40 | 47%         |

The industry earned an average score in **Data Security** of 4.40 with 47% of evaluations as Outstanding.

Aires earned the highest metrics followed closely by NEI Global.

### **INTEGRITY: Honesty, keeping commitments, consistent moral code and respect**

|                             | Fail | Poor | Mediocre | V.Good | Outstanding |     |      | %           |
|-----------------------------|------|------|----------|--------|-------------|-----|------|-------------|
| SUPPLIER                    | 1    | 2    | 3        | 4      | 5           | #   | AVER | Outstanding |
| Aires                       |      |      |          | 5      | 10          | 15  | 4.67 | 67%         |
| Altair Global               |      |      | 1        | 5      | 9           | 15  | 4.53 | 60%         |
| Bristol Global Mobility     |      |      |          | 7      | 15          | 22  | 4.68 | 68%         |
| Cartus                      |      |      | 1        | 12     | 13          | 26  | 4.46 | 50%         |
| Graebel                     |      |      | 1        | 14     | 16          | 31  | 4.48 | 52%         |
| NEI Global Relocation       |      |      |          | 3      | 15          | 18  | 4.83 | 83%         |
| RELO Direct                 |      |      |          | 5      | 14          | 19  | 4.74 | 74%         |
| SIRVA                       |      |      |          | 26     | 19          | 45  | 4.42 | 42%         |
| Weichert Workforce Mobility |      |      |          | 6      | 11          | 17  | 4.65 | 65%         |
| Other                       |      |      | 2        | 18     | 34          | 54  | 4.59 | 63%         |
|                             | 0    | 0    | 5        | 101    | 156         | 262 | 4.58 | 60%         |

The industry earned an average score in **Integrity** of 4.58 while percent Outstanding is 60%.

NEI Global and RELO Direct earned the highest pair of metrics with Bristol Global, Aires and Weichert slightly further behind.

**ACCOUNT MANAGER: the individual assigned to your account is responsive, thinks strategically as well as tactically, works with you as a partner, takes ownership of problems and solves them quickly**

|                             | Fail | Poor | Mediocre | V.Good | Outstanding |     |      | %           |
|-----------------------------|------|------|----------|--------|-------------|-----|------|-------------|
| SUPPLIER                    | 1    | 2    | 3        | 4      | 5           | #   | AVER | Outstanding |
| Aires                       |      |      |          | 5      | 10          | 15  | 4.67 | 67%         |
| Altair Global               |      |      | 1        | 6      | 8           | 15  | 4.47 | 53%         |
| Bristol Global Mobility     |      |      |          | 4      | 18          | 22  | 4.82 | 82%         |
| Cartus                      |      | 1    | 3        | 9      | 13          | 26  | 4.31 | 50%         |
| Graebel                     |      |      |          | 11     | 20          | 31  | 4.65 | 65%         |
| NEI Global Relocation       |      |      |          | 4      | 14          | 18  | 4.78 | 78%         |
| RELO Direct                 |      |      |          | 4      | 15          | 19  | 4.79 | 79%         |
| SIRVA                       |      |      |          | 11     | 34          | 45  | 4.76 | 76%         |
| Weichert Workforce Mobility |      |      | 1        | 4      | 12          | 17  | 4.65 | 71%         |
| Other                       |      | 1    |          | 17     | 36          | 54  | 4.63 | 67%         |
|                             | 0    | 2    | 5        | 75     | 180         | 262 | 4.65 | 69%         |

This is the second consecutive year this attribute is covered in this annual survey as it gains importance in “critical needs” stated by corporate managers.

The industry achieved an average score of 4.65 and 69% Outstanding evaluations.

Bristol Global Mobility had the highest set of evaluations followed by RELO Direct and NEI.

**SERVICE RECOVERY: when mistakes or errors occur the RMC not only fixes the immediate issue but implements processes and standards to minimize reoccurrence.**

|                             | Fail | Poor | Mediocre | V.Good | Outstanding |     |      | %           |
|-----------------------------|------|------|----------|--------|-------------|-----|------|-------------|
| SUPPLIER                    | 1    | 2    | 3        | 4      | 5           | #   | AVER | Outstanding |
| Aires                       |      |      |          | 4      | 11          | 15  | 4.73 | 73%         |
| Altair Global               |      |      | 1        | 6      | 8           | 15  | 4.47 | 53%         |
| Bristol Global Mobility     |      |      | 1        | 11     | 10          | 22  | 4.41 | 45%         |
| Cartus                      |      | 1    | 2        | 16     | 7           | 26  | 4.12 | 27%         |
| Graebel                     |      |      | 1        | 17     | 13          | 31  | 4.39 | 42%         |
| NEI Global Relocation       |      |      |          | 5      | 13          | 18  | 4.72 | 72%         |
| RELO Direct                 |      |      |          | 5      | 14          | 19  | 4.74 | 74%         |
| SIRVA                       |      |      | 3        | 25     | 17          | 45  | 4.31 | 38%         |
| Weichert Workforce Mobility |      |      |          | 10     | 7           | 17  | 4.41 | 41%         |
| Other                       |      |      | 3        | 24     | 27          | 54  | 4.44 | 50%         |
|                             | 0    | 1    | 11       | 123    | 127         | 262 | 4.44 | 48%         |

The industry achieved an average score of 4.44 and 48% Outstanding evaluations. Although this is the fifth most critical attribute expressed by managers the surveyed evaluations over

the years shows less than 50% of managers believe their suppliers is an outstanding performer.

RELO Direct, Aires and NEI are the top three, closely bunched suppliers.

### **RESPONSIVENESS: reacting appropriately in a timely manner**

| SUPPLIER                    | Fail<br>1 | Poor<br>2 | Mediocre<br>3 | V.Good<br>4 | Outstanding<br>5 | #   | AVER | %<br>Outstanding |
|-----------------------------|-----------|-----------|---------------|-------------|------------------|-----|------|------------------|
| Aires                       |           |           |               | 5           | 10               | 15  | 4.67 | 67%              |
| Altair Global               |           |           | 2             | 6           | 7                | 15  | 4.33 | 47%              |
| Bristol Global Mobility     |           |           |               | 8           | 14               | 22  | 4.64 | 64%              |
| Cartus                      |           | 1         | 1             | 9           | 15               | 26  | 4.46 | 58%              |
| Graebel                     |           |           |               | 14          | 17               | 31  | 4.55 | 55%              |
| NEI Global Relocation       |           |           |               | 4           | 14               | 18  | 4.78 | 78%              |
| RELO Direct                 |           |           |               | 4           | 15               | 19  | 4.79 | 79%              |
| SIRVA                       |           |           | 2             | 17          | 26               | 45  | 4.53 | 58%              |
| Weichert Workforce Mobility |           |           | 1             | 6           | 10               | 17  | 4.53 | 59%              |
| Other                       |           |           | 4             | 24          | 26               | 54  | 4.41 | 48%              |
|                             | 0         | 1         | 10            | 97          | 154              | 262 | 4.54 | 59%              |

The industry achieved an average score of 4.54 and 59% Outstanding evaluations.

RELO Direct and NEI are the top pair of suppliers followed by Aires and Bristol Global.

### **TRANSPARENCY the extent to which your RMC discloses and communicates important internal and external information with clarity and accuracy**

| SUPPLIER                    | Fail<br>1 | Poor<br>2 | Mediocre<br>3 | V.Good<br>4 | Outstanding<br>5 | #   | AVER | %<br>Outstanding |
|-----------------------------|-----------|-----------|---------------|-------------|------------------|-----|------|------------------|
| Aires                       |           |           | 2             | 6           | 7                | 15  | 4.33 | 47%              |
| Altair Global               |           |           | 1             | 6           | 8                | 15  | 4.47 | 53%              |
| Bristol Global Mobility     |           |           |               | 10          | 12               | 22  | 4.55 | 55%              |
| Cartus                      |           | 1         | 3             | 7           | 15               | 26  | 4.38 | 58%              |
| Graebel                     |           | 1         | 1             | 20          | 9                | 31  | 4.19 | 29%              |
| NEI Global Relocation       |           |           |               | 5           | 13               | 18  | 4.72 | 72%              |
| RELO Direct                 |           |           |               | 5           | 14               | 19  | 4.74 | 74%              |
| SIRVA                       |           |           |               | 26          | 19               | 45  | 4.42 | 42%              |
| Weichert Workforce Mobility |           | 1         |               | 10          | 6                | 17  | 4.24 | 35%              |
| Other                       |           |           | 1             | 22          | 31               | 54  | 4.56 | 57%              |
|                             | 0         | 3         | 8             | 117         | 134              | 262 | 4.46 | 51%              |

This is the second year this attribute is covered in the survey. Corporate managers stated this is the seventh most critical attribute an RMC should exhibit.

The industry achieved an average score of 4.46 and 51% Outstanding evaluations.

RELO Direct and NEI are the top pair of suppliers and greatly exceed competition.

**BILLING Invoices you receive from the RMC are both accurate and timely with appropriate divisional coding (if appropriate) and data has integrity**

| SUPPLIER                    | Fail<br>1 | Poor<br>2 | Mediocre<br>3 | V.Good<br>4 | Outstanding<br>5 | #   | AVER | %<br>Outstanding |
|-----------------------------|-----------|-----------|---------------|-------------|------------------|-----|------|------------------|
| Aires                       |           |           | 1             | 7           | 7                | 15  | 4.40 | 47%              |
| Altair Global               |           |           |               | 10          | 5                | 15  | 4.33 | 33%              |
| Bristol Global Mobility     |           |           |               | 10          | 12               | 22  | 4.55 | 55%              |
| Cartus                      |           |           | 2             | 10          | 14               | 26  | 4.46 | 54%              |
| Graebel                     |           |           | 1             | 20          | 10               | 31  | 4.29 | 32%              |
| NEI Global Relocation       |           |           |               | 8           | 10               | 18  | 4.56 | 56%              |
| RELO Direct                 |           |           | 1             | 6           | 12               | 19  | 4.58 | 63%              |
| SIRVA                       |           |           | 2             | 30          | 13               | 45  | 4.24 | 29%              |
| Weichert Workforce Mobility |           |           |               | 11          | 6                | 17  | 4.35 | 35%              |
| Other                       |           | 1         | 1             | 26          | 26               | 54  | 4.43 | 48%              |
|                             | 0         | 1         | 8             | 138         | 115              | 262 | 4.40 | 44%              |

The industry achieved an average score of 4.40 and 44% Outstanding evaluations.

RELO Direct earned the highest metrics. NEI and Bristol Global the next best performers.

**FINANCIAL DISBURSEMENTS TO EMPLOYEES. Making timely and accurate disbursements to transferring employees.**

| SUPPLIER                    | Fail<br>1 | Poor<br>2 | Mediocre<br>3 | V.Good<br>4 | Outstanding<br>5 | #   | AVER | %<br>Outstanding |
|-----------------------------|-----------|-----------|---------------|-------------|------------------|-----|------|------------------|
| Aires                       |           |           |               | 7           | 8                | 15  | 4.53 | 53%              |
| Altair Global               |           |           |               | 8           | 7                | 15  | 4.47 | 47%              |
| Bristol Global Mobility     |           |           |               | 13          | 9                | 22  | 4.41 | 41%              |
| Cartus                      |           |           | 1             | 9           | 16               | 26  | 4.58 | 62%              |
| Graebel                     |           |           | 1             | 20          | 10               | 31  | 4.29 | 32%              |
| NEI Global Relocation       |           |           |               | 6           | 12               | 18  | 4.67 | 67%              |
| RELO Direct                 |           |           |               | 5           | 14               | 19  | 4.74 | 74%              |
| SIRVA                       |           |           | 1             | 24          | 20               | 45  | 4.42 | 44%              |
| Weichert Workforce Mobility |           |           |               | 10          | 7                | 17  | 4.41 | 41%              |
| Other                       |           |           | 1             | 26          | 27               | 54  | 4.48 | 50%              |
|                             | 0         | 0         | 4             | 128         | 130              | 262 | 4.48 | 50%              |

This is the ninth most critical attribute a supplier can exhibit and the first year in the “top ten” list.

The industry achieved an average score of 4.48 and 50% Outstanding evaluations.

RELO Direct, NEI and Cartus are the top three performing suppliers.

**SERVICE CONSISTENCY: Service delivery to all your employees is consistent and uniform regardless of the type of move, title or organizational level of the employee, regardless of move-benefits received and supplier representative delivering the service.**

|                             | Fail | Poor | Mediocre | V.Good | Outstanding |     |      | %           |
|-----------------------------|------|------|----------|--------|-------------|-----|------|-------------|
| SUPPLIER                    | 1    | 2    | 3        | 4      | 5           | #   | AVER | Outstanding |
| Aires                       |      |      | 1        | 7      | 7           | 15  | 4.40 | 47%         |
| Altair Global               |      |      |          | 10     | 5           | 15  | 4.33 | 33%         |
| Bristol Global Mobility     |      |      |          | 9      | 13          | 22  | 4.59 | 59%         |
| Cartus                      |      |      | 1        | 12     | 13          | 26  | 4.46 | 50%         |
| Graebel                     |      |      | 1        | 16     | 14          | 31  | 4.42 | 45%         |
| NEI Global Relocation       |      |      |          | 4      | 14          | 18  | 4.78 | 78%         |
| RELO Direct                 |      |      |          | 4      | 15          | 19  | 4.79 | 79%         |
| SIRVA                       |      |      | 2        | 21     | 22          | 45  | 4.44 | 49%         |
| Weichert Workforce Mobility |      |      |          | 3      | 14          | 17  | 4.82 | 82%         |
| Other                       |      |      |          | 24     | 30          | 54  | 4.56 | 56%         |
|                             | 0    | 0    | 5        | 110    | 147         | 262 | 4.54 | 56%         |

This is the tenth most critical attribute a supplier can exhibit and the first year in the “top ten” list.

The industry achieved an average score of 4.54 and 56% Outstanding evaluations.

Weichert Workforce Mobility is the top performer followed by RELO Direct and NEI.

## TECHNOLOGY

Although technology is far less critical to corporate managers than the attributes listed above it seems to be a consideration many managers focus today.

### TECHNOLOGY FOR YOU AND YOUR DEPARTMENT.

|                             | Fail | Poor | Mediocre | V.Good | Outstanding |     |      | %           |
|-----------------------------|------|------|----------|--------|-------------|-----|------|-------------|
| SUPPLIER                    | 1    | 2    | 3        | 4      | 5           | #   | AVER | Outstanding |
| Aires                       |      |      |          | 7      | 8           | 15  | 4.53 | 53%         |
| Altair Global               |      |      | 3        | 9      | 3           | 15  | 4.00 | 20%         |
| Bristol Global Mobility     |      |      | 1        | 16     | 5           | 22  | 4.18 | 23%         |
| Cartus                      | 1    |      | 4        | 18     | 3           | 26  | 3.85 | 12%         |
| Graebel                     |      | 1    | 2        | 26     | 2           | 31  | 3.94 | 6%          |
| NEI Global Relocation       |      |      | 1        | 8      | 9           | 18  | 4.44 | 50%         |
| RELO Direct                 |      |      | 2        | 11     | 6           | 19  | 4.21 | 32%         |
| SIRVA                       |      |      | 2        | 37     | 6           | 45  | 4.09 | 13%         |
| Weichert Workforce Mobility |      |      | 1        | 6      | 10          | 17  | 4.53 | 59%         |
| Other                       | 1    | 1    | 2        | 30     | 20          | 54  | 4.24 | 37%         |
|                             | 2    | 2    | 18       | 168    | 72          | 262 | 4.17 | 27%         |

Weichert Workforce Mobility and Aires share the top-spot in average score while Weichert earned the highest percent “outstanding” evaluations followed by Aires.

### TECHNOLOGY USED BY YOUR MOVING EMPLOYEEES.

|          | Fail | Poor | Mediocre | V.Good | Outstanding |    |      | %           |
|----------|------|------|----------|--------|-------------|----|------|-------------|
| SUPPLIER | 1    | 2    | 3        | 4      | 5           | #  | AVER | Outstanding |
| Aires    |      |      |          | 7      | 8           | 15 | 4.53 | 53%         |



|                             |   |   |    |     |    |      |      |     |
|-----------------------------|---|---|----|-----|----|------|------|-----|
| Altair Global               |   | 3 | 9  | 3   | 15 | 4.00 | 20%  |     |
| Bristol Global Mobility     |   | 2 | 15 | 5   | 22 | 4.14 | 23%  |     |
| Cartus                      |   | 3 | 20 | 3   | 26 | 4.00 | 12%  |     |
| Graebel                     |   | 2 | 29 |     | 31 | 3.94 | 0%   |     |
| NEI Global Relocation       |   | 1 | 7  | 10  | 18 | 4.50 | 56%  |     |
| RELO Direct                 |   | 1 | 12 | 6   | 19 | 4.26 | 32%  |     |
| SIRVA                       |   | 2 | 36 | 7   | 45 | 4.11 | 16%  |     |
| Weichert Workforce Mobility |   | 1 | 6  | 10  | 17 | 4.53 | 59%  |     |
| Other                       | 1 | 2 | 29 | 22  | 54 | 4.33 | 41%  |     |
|                             | 0 | 1 | 17 | 170 | 74 | 262  | 4.21 | 28% |

The industry achieved an average score of 4.21 and very low 28% Outstanding evaluations.

Again, Weichert Workforce Mobility and Aires share the top-spot in average score. These two suppliers and NEI are the only suppliers exceeding 50% outstanding evaluations.

### **FUTURE POLICY OR NON-POLICY RELOCATION RELATED RESEARCH**

The last question on the survey inquired on any types of relocation related research studies could be helpful to corporate managers in 2025. Six choices were given and an opportunity for the manager to enter another desired "need" for 2025.

**I would like your help in selecting policy or program research on your behalf in 2025. Which of these, or others, you recommend or interest you?**

|                                                                                                          | Yes, most certainly | Yes, but not that important | No interest |
|----------------------------------------------------------------------------------------------------------|---------------------|-----------------------------|-------------|
| Study on any program or policy changes you made or considering due to the NAR versus Burnett settlement. | 42%                 | 22%                         | 36%         |
| Study on any Business Traveler policy.                                                                   | 27%                 | 29%                         | 44%         |
| Study on any Core-Flex relocation benefit policy.                                                        | 32%                 | 24%                         | 44%         |
| Study on Small HHG Shipment policy.                                                                      | 22%                 | 34%                         | 44%         |
| Study on your relocation team: how organized , responsibilities, size.                                   | 25%                 | 25%                         | 49%         |
| Study on any Interns and relocation                                                                      | 26%                 | 26%                         | 48%         |
| Study on domestic USA Assignments                                                                        | 24%                 | 33%                         | 43%         |

From this list additional research on the *Burnett versus NAR* legal settlement is the most desired by 64% if all survey respondents. The other pre-selected options were all in the 50%-60% ranges.

A few corporate managers voluntarily offered other survey/research projects:

- > Are there any great forecasting methods we've found that help project relo costs?
  - > Cost of living programs
  - > Executive level relocation support
  - > Housing options for larger groups of interns
- I'd love to hear how relo eligibility has evolved with remote workers. Do you allow employees to sit remote for a period before they relo (6-9 mos to finish out the school year, etc.)? Do you offer relo for remote roles that are re-classified to in person? etc.
- > Interest in global intern benchmarking - US Intern programs have been the focus this year.
  - > Level of allowances provided by policy type (i.e. expat, permanent transfers)
  - > Policy updates with the changes in real estate commission fees.
  - > Study on impact of solar systems on residential homes
  - > Users experience platforms and technology
  - > Work from Anywhere Policies