

2021 Mobility Outlook: COVID-19 Impact - Market Survey Q4

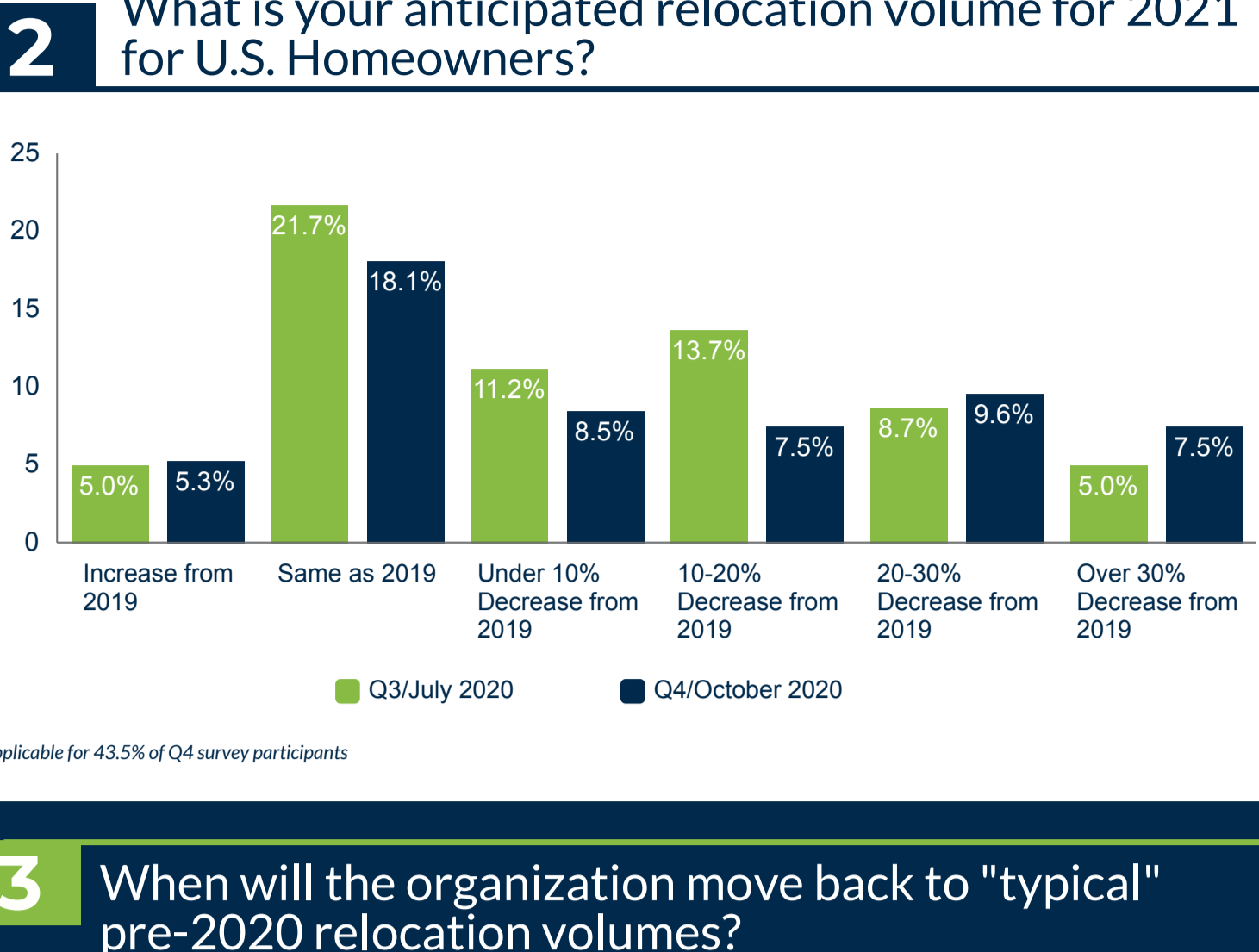
Effective October 1, 2020

SIRVA's second evolution of our 2021 Mobility Outlook COVID-19 Market Survey further explores the potential impact on move volumes, program support, and alternative relocation types (e.g., virtual assignments). The results are shared below.

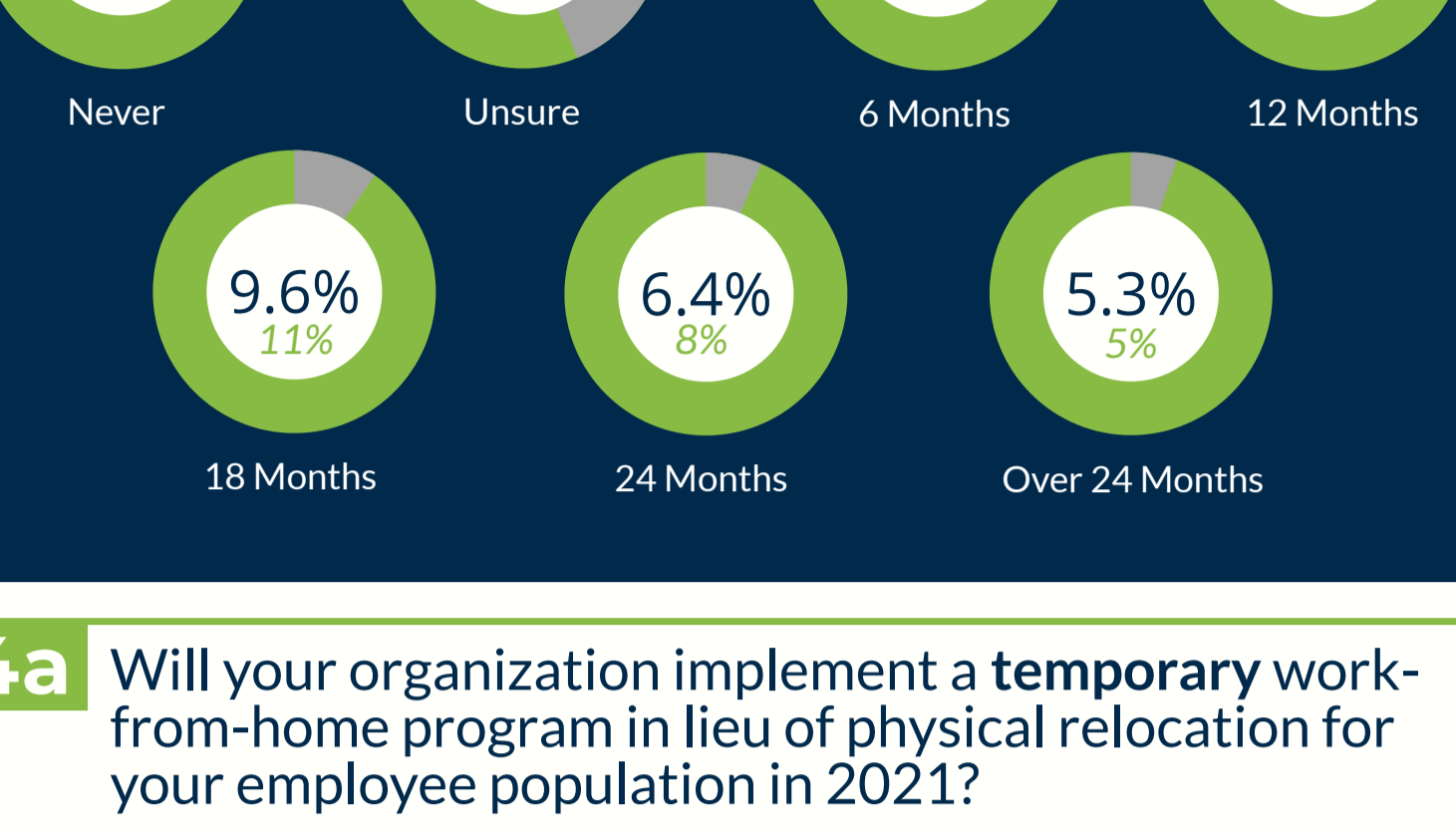
- Relocation volume expected to be down -14% from 2019
- US home sale volume expected to be down -7% from 2019
- The majority (49%) of respondents are still unsure when volumes will return to pre-COVID levels; 38% anticipate a return to pre-pandemic volumes in 2021/early 2022
- Working from home is still morphing - the majority are unsure how it will impact programs
- 49% of respondents expect an increase in cost reductions related to mobility spend in 2021

Throughout the survey results, the italicized number in each circle represents the percentage of responses from the Q3/July survey as a point of comparison.

1 What is your anticipated relocation volume for 2021?



2 What is your anticipated relocation volume for 2021 for U.S. Homeowners?

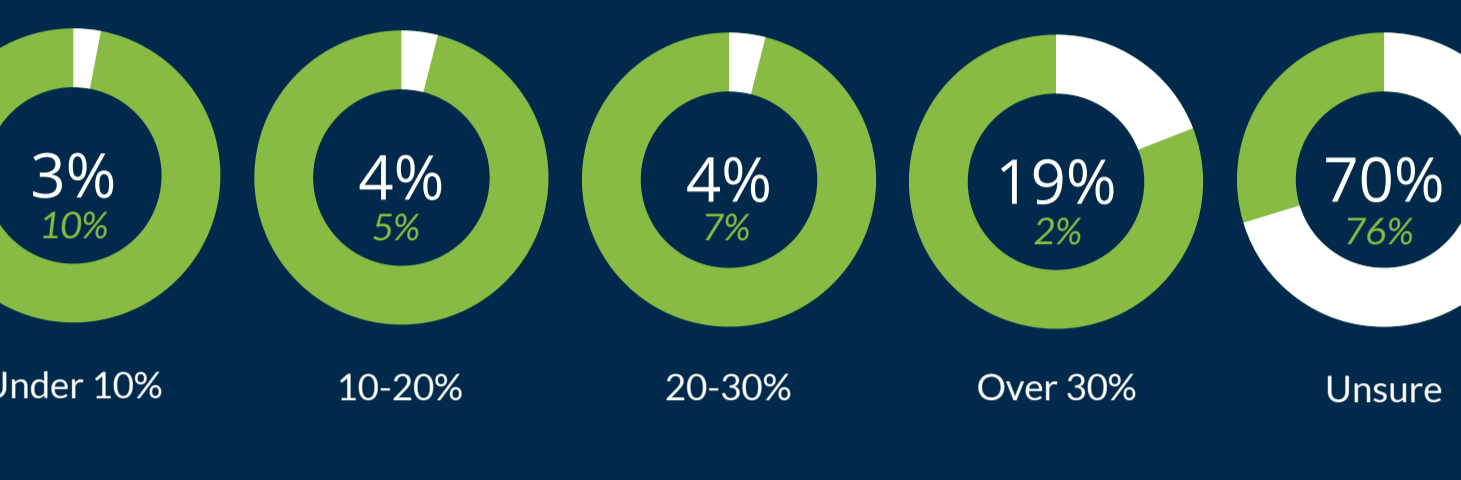


*Not Applicable for 43.5% of Q4 survey participants

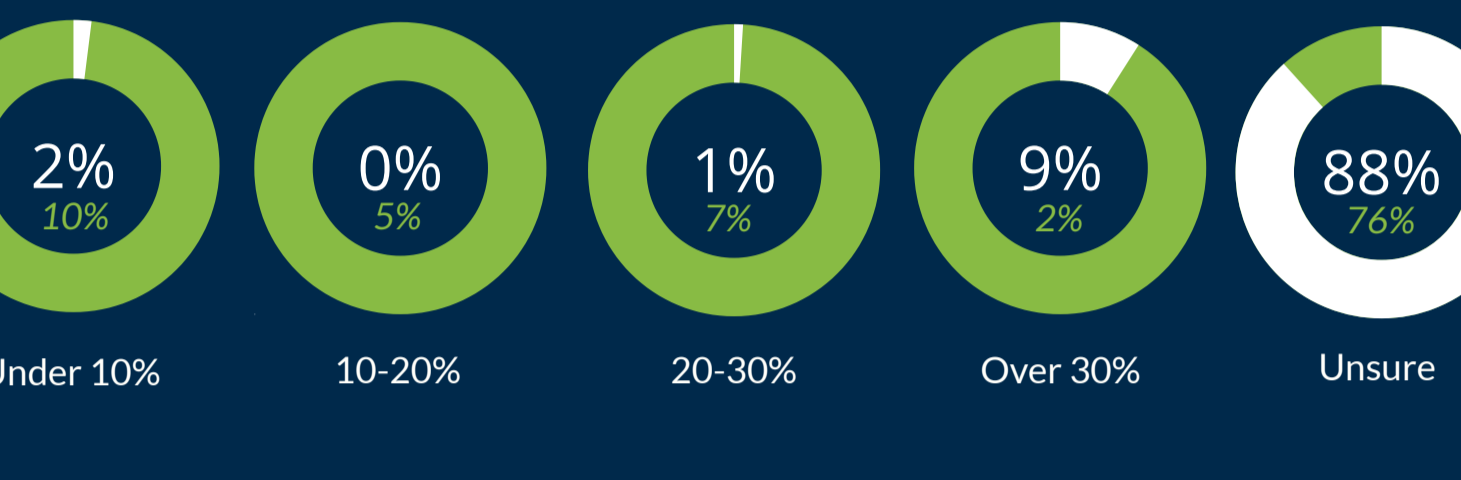
3 When will the organization move back to "typical" pre-2020 relocation volumes?



4a Will your organization implement a temporary work-from-home program in lieu of physical relocation for your employee population in 2021?

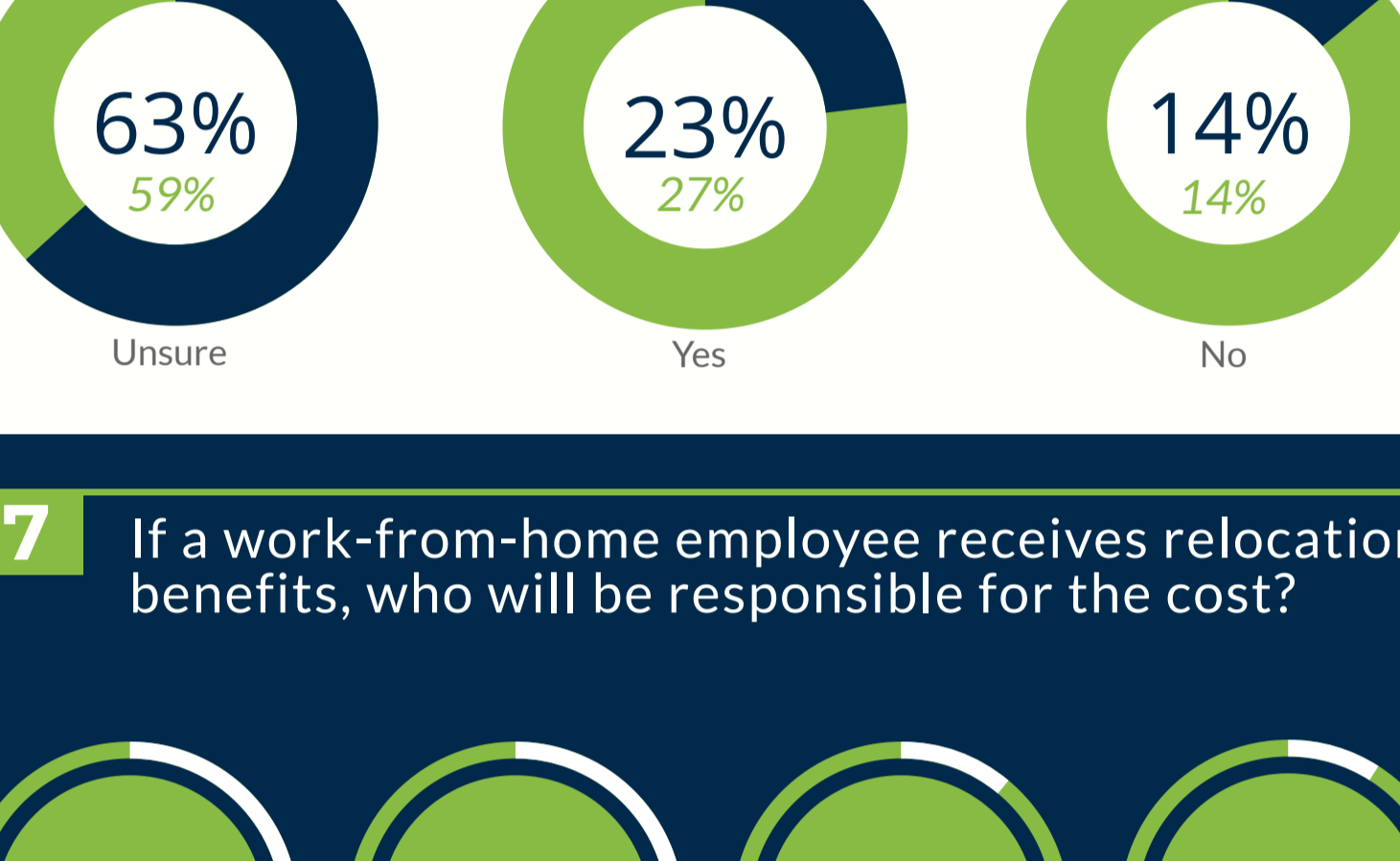


4b Will your organization implement a permanent work-from-home program in lieu of physical relocation for your employee population in 2021?



*In Q3, this question focused on generic work from home. In Q4, the question was split between permanent and temporary work from home.

5a If yes, what percentage of the temporary employee population will be impacted?



5b If yes, what percentage of the permanent employee population will be impacted?



*In Q3, this question focused on generic work from home. In Q4, the question was split between permanent and temporary work from home.

6 Will work-from-home employees who opt to relocate receive relocation benefits?



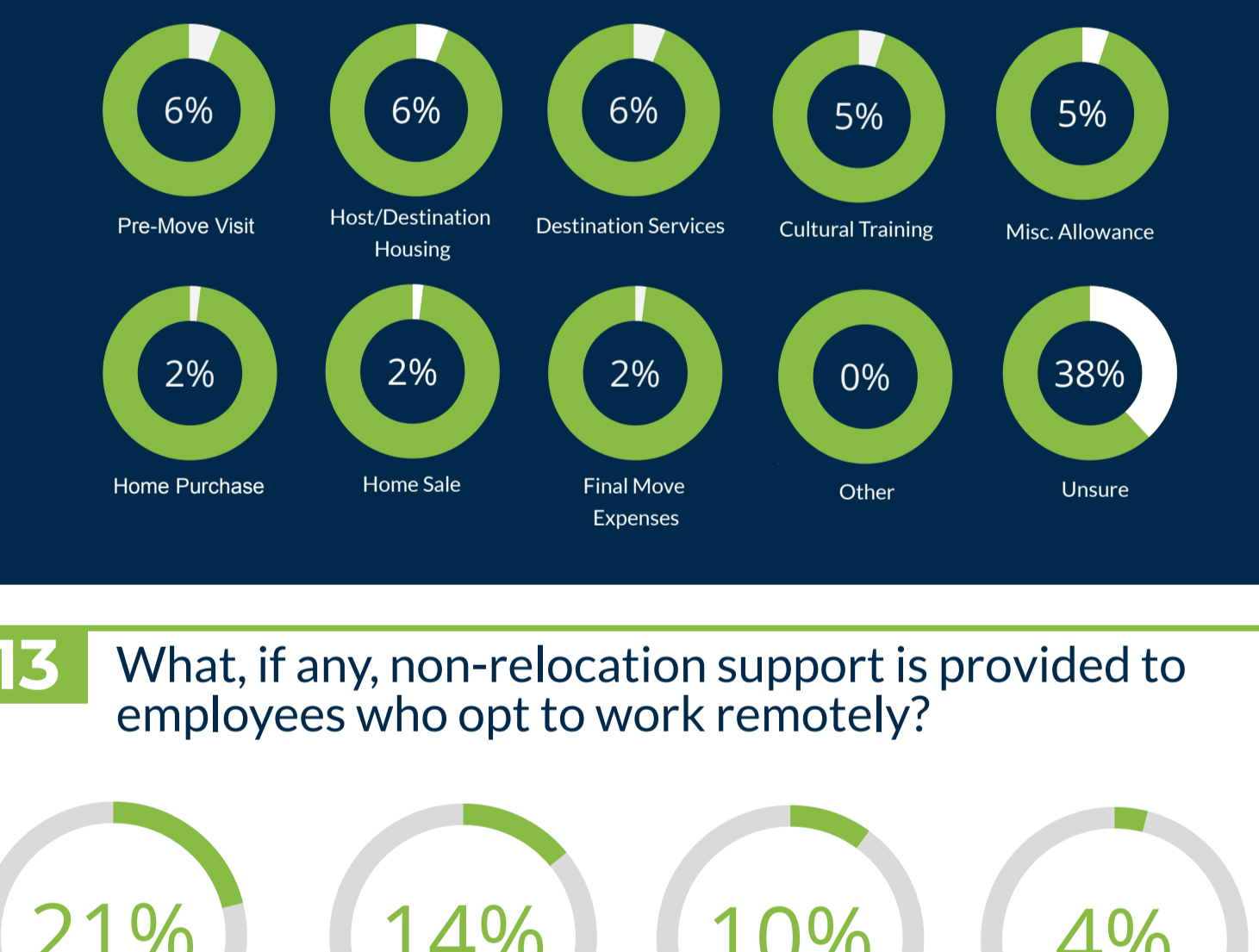
7 If a work-from-home employee receives relocation benefits, who will be responsible for the cost?



8 Is your organization considering a reduction in mobility spend for 2021?



9 If yes, cost minimization will focus on the following policy components.



*Multiple responses allowed

10 If the ability to relocate employees in 2021 is impacted, what employee populations will continue to relocate?



Additional probing questions were added for part two of the survey series below.

11 Is your organization struggling to find local resource roles in the host/destination location?



12 What support will be provided to employees that are eligible to work remotely and who opt to do so (rather than relocate)?



13 What, if any, non-relocation support is provided to employees who opt to work remotely?



14 Is your organization considering or implementing practices to hire resources locally in lieu of relocation?



15 If yes to question 14, is there an interim or long-term solution to workforce deployment challenges?

16 Please select your organization's primary industry.

17 What range best approximates your global employee population size?

18 What range best approximates the volume of mobile employees at your organization (excluding business travelers)?

19 Please select the description that best describes the types of relocation that your company manages.

