

MOVING TRENDS

Military and Veteran Families Survey

Conducted March 13-18, 2024



OVERVIEW

This scientific survey of American military families was conducted to learn more about their perceptions of various aspects of military life, including their experiences with Permanent Change of Station (PCS) household moves.

The survey randomly sampled active-duty military members, military spouses, and veterans and their spouses to provide insights into levels of satisfaction with the current PCS system and views on the new Global Household Goods contract recently awarded to HomeSafe.

Summary of Key Findings

- About 9 in 10 respondents said their military relocations within the past 4 years met or exceeded expectations.
- Approximately 70% of respondents who experienced domestic relocations within the last 12 months believe military moves have improved.
- Relocations have become less stressful in the last 12 months, with families averaging a 5.8 out of 10 in terms of stressfulness, down from a 6.2 in the previous 1-4 years.
- Approximately 85% of respondents expressed concern over potentially negative impacts on military families from the new GHC contract.
- Nearly two-thirds of respondents (64%) want to see the new GHC contract canceled.
- Respondents expressed significant concern about system wide issues with the GHC contract, including added burdens and financial strains on military families and the potential negative impacts on small businesses and independent owner-operators.

Methodology

947 members of military families responded to the survey conducted through Verve Consulting, LLC from March 13-18, 2024, representing a 99% response rate from individuals who met all survey eligibility requirements. The invitation to participate referred broadly to military life in order to reduce the potential for response bias toward those who had particularly good or bad prior experiences with PCS moves.

Respondents included a broad representation of active-duty personnel and their spouses as well as veterans and their spouses. Findings are representative of American military families in terms of age, race, gender, and region, and include:

- 826 who have completed a PCS move – including 462 who have done so within the past four years, 394 of whom were active-duty military families and 553 veterans.
- 506 military personnel and 441 military spouses.
- Among those who have completed a PCS move, 77% for whom the most recent relocation was domestic and 23% international.

KEY FINDINGS

Military families say their recent moves met or exceeded expectations, with some improvements being noted among those who relocated within the past year. About 9 in 10 respondents said their military relocations within the past four years met or exceeded their expectations in the following respects:

- 90% - Care taken to protect household items
- 87% - Communication with moving company
- 87% - Communication with service branch or transportation office
- 83% - Timeliness of move

These families believe military moves have improved over the years – especially those who moved domestically within the last 12 months. Improvement is perceived by:

- 70% of those who relocated domestically within the past year, compared with 58% of those who relocated domestically 1-4 years ago

Relocations have become less stressful recently, particularly for those who have made domestic moves. The average military family that was relocated within the last 12 months rated their most recent move as a 5.8 out of 10 in terms of stressfulness, down from 6.2 for those with moves in the previous 1-4 years.

- Just 9% of families whose most recent PCS move occurred in the last 12 months rated their move as “extremely stressful,” down from 15% of those who moved in the previous 1-4 years.
- This difference is even greater when considering only domestic moves – just 4% of families who moved in the last 12 months considered their move “extremely stressful,” down from 17% in the previous 1-4 years.

More than 5 in 6 military families (85%) are concerned about how the transition to the HomeSafe contract could impact individual families. Overall, respondents expressed concerns that numerous aspects of moving could become worse under the HomeSafe contract:

- 43% - Financial strain
- 42% - Emotional toll of being apart from spouse
- 42% - Child unable to timely enroll in school due to moving delays
- 41% - Need to buy replacement household items
- 41% - Being forced to handle moves on one’s own
- 40% - Lost wages for oneself or their spouse due to moving delays

Nearly two-thirds (64%) of respondents overall support the cancellation of the HomeSafe contract, with the same portion (64%) among active-duty families.

Overall, respondents demonstrated significant concerns about several potential systemwide consequences of the new GHC contract. These include:

- 74% - Additional logistical and financial burdens on military families due to a likely reduction of participating moving companies or reliance on inexperienced contractors.
- 72% - Impacts on taxpayers overall, when a government agency pays a middleman to do an unnecessary function.
- 70% - Possible impacts on American small businesses that are built on serving military families but may be put out of business by this new contracting process.
- 70% - Ability for HomeSafe to protect highly sensitive information about military families and their locations.

DATA TABLES

How stressful would you rate your last military move? "0" is not stressful at all, and "10" is extremely stressful				
	ALL		Domestic	
	<1 year	1 - 4 years	<1 year	1 - 4 years
Mean	5.8	6.2	5.4	6.2
NOT STRESSFUL AT ALL (NET)	8%	4%	7%	4%
0 (0)	3%	2%	2%	2%
1 (1)	5%	2%	5%	2%
2 (2)	4%	5%	6%	6%
3 (3)	14%	7%	17%	8%
4 (4)	0%	9%	1%	9%
5 (5)	8%	3%	8%	3%
6 (6)	20%	18%	21%	17%
7 (7)	20%	22%	22%	21%
8 (8)	17%	16%	14%	15%
9 (9)	4%	6%	3%	7%
10 (10)	4%	9%	1%	9%
EXTREMELY STRESSFUL (NET)	9%	15%	4%	17%

Would you say that the military's management of the relocation process has...			
[MOVE TYPE = Domestic]	ALL MOVES WITHIN PREVIOUS 4 YEARS	LATEST MOVE	
		<1 year	1 - 4 years
	ALL		
Improved over the years	60%	70%	58%
Gotten worse over the years	18%	16%	19%
Stayed the same	21%	14%	23%

Timeliness of move			
	ALL MOVES WITHIN PREVIOUS 4 YEARS	LATEST MOVE	
		<1 year	1 - 4 years
	ALL		
Fell short of expectations	17%	17%	18%
Met or exceeded expectations	83%	83%	82%

Communication with your service branch or transportation office			
	ALL MOVES WITHIN PREVIOUS 4 YEARS	LATEST MOVE	
		<1 year	1 - 4 years
	ALL		
Fell short of expectations	13%	12%	13%
Met or exceeded expectations	87%	88%	87%

DATA TABLES

Communication with the moving company			
	ALL MOVES WITHIN PREVIOUS 4 YEARS	LATEST MOVE	
	ALL	<1 year	1 - 4 years
Fell short of expectations	13%	12%	13%
Met or exceeded expectations	87%	88%	87%

Care taken to protect household items			
	ALL MOVES WITHIN PREVIOUS 4 YEARS	LATEST MOVE	
	ALL	<1 year	1 - 4 years
Fell short of expectations	10%	8%	11%
Met or exceeded expectations	90%	92%	89%

As you may know, the Department of Defense is transitioning to a new process for PCS moves, and selected HomeSafe Alliance as the sole contractor to manage all household moving services. How concerned are you regarding the impact that this transition to HomeSafe could have on you or other military families?			
	ALL	STATUS	
	ALL	Active	Veteran
CONCERNED (NET)	71%	77%	67%
<i>Very concerned</i>	28%	35%	22%
<i>Somewhat concerned</i>	43%	42%	44%
Not too concerned	19%	18%	19%
Not concerned at all	10%	4%	14%

Do you believe TRANSCOM should:			
	ALL	STATUS	
	ALL	Active	Veteran
CANCEL CONTRACT (NET)	64%	64%	65%
<i>Cancel the contract with HomeSafe and continue to improve the current system for PCS moves</i>	36%	31%	41%
<i>Cancel the contract with HomeSafe and rebid it to a different, proven privatized contractor</i>	28%	33%	24%
Proceed with the transition to outsource to HomeSafe	36%	36%	35%

DATA TABLES

Ability for HomeSafe to protect highly sensitive information about military families and their locations			
	ALL	STATUS	
	ALL	Active	Veteran
CONCERNED (NET)	70%	71%	70%
<i>Very concerned</i>	31%	33%	29%
<i>Somewhat concerned</i>	40%	38%	41%
Not too concerned	23%	23%	23%
Not concerned at all	7%	6%	8%

Additional logistical and financial burdens on military families due to a likely reduction of participating moving companies or reliance on inexperienced contractors			
	ALL	STATUS	
	ALL	Active	Veteran
CONCERNED (NET)	74%	76%	72%
<i>Very concerned</i>	31%	33%	30%
<i>Somewhat concerned</i>	42%	43%	42%
Not too concerned	20%	19%	21%
Not concerned at all	6%	4%	8%

Possible impacts on American small businesses that are built on serving military families but may be put out of business by this new contracting process			
	ALL	STATUS	
	ALL	Active	Veteran
CONCERNED (NET)	70%	74%	67%
<i>Very concerned</i>	30%	35%	26%
<i>Somewhat concerned</i>	41%	40%	41%
Not too concerned	23%	22%	23%
Not concerned at all	7%	4%	10%

Impacts on taxpayers overall, when a government agency pays a middleman to do an unnecessary function			
	ALL	STATUS	
	ALL	Active	Veteran
CONCERNED (NET)	72%	73%	72%
<i>Very concerned</i>	30%	30%	30%
<i>Somewhat concerned</i>	43%	43%	42%
Not too concerned	20%	22%	19%
Not concerned at all	8%	6%	9%

Industry experts predict that HomeSafe's new system will result in shortages of participating movers, extended delays, and low-quality moves. What impact(s) do you believe this could have on your life or that of other military families? Select all that apply			
	ALL	STATUS	
	ALL	Active	Veteran
AT LEAST 1 CONCERN (NET)	85%	88%	81%
<i>Lost wages for myself or my spouse</i>	40%	42%	39%
<i>Child unable to timely enroll in a new school</i>	42%	38%	46%
<i>Need to buy replacement household items</i>	41%	37%	45%
<i>Financial strain</i>	43%	36%	48%
<i>Emotional toll of being apart from spouse</i>	42%	36%	46%
<i>Being forced to handle moves on one's own</i>	41%	32%	48%
None of the above	15%	12%	19%