# 2011 SURVEY OF CORPORATE RELOCATION MANAGERS

An Independent Survey Performed by Trippel Survey & Research, LLC


## #1 "Overall Performance"

• Highest Net Satisfaction - Budd Van Lines
• 25% higher than closest competitor
• 34% higher than industry average

## #1 "Willingness to Recommend"

• Highest Net Satisfaction- Budd Van Lines
• 17% higher than closest competitor
• 35% higher than industry average

## #1 “Ability to Deliver Maximum Transferee Satisfaction“

• Highest Net Satisfaction- Budd Van Lines
• 18% higher than closest competitor
• 33% higher than industry average

## #1 “Pricing Philosophy of Carriers"

• Highest Net Satisfaction- Budd Van Lines
• 4% higher than closest competitor
• 16% higher than industry average

**Corporate America’s Best Move** **WWW.BUDDVANLINES.COM**

# NINTH ANNUAL
# *RELOCATION MANAGERS' SURVEY©*
# on the HOUSEHOLD GOODS INDUSTRY

## BACKGROUND

Trippel Survey & Research, LLC conducted this survey to (1) obtain evaluations from corporate relocation mangers regarding their level of satisfaction with the moving service suppliers utilized in transferee relocation and (2) gather other information on issues pertinent and relevant to managing relocation household goods shipments.

## METHODOLOGY

This is the ninth annual *Relocation Managers' Survey*© on the HHG industry. Relocation managers received one email message with a reminder notice a week after the survey's launch. Each recipient was encouraged, but not required, to provide the company name; there is no way to identify anonymous responses. Participants were able to share the industry the company competes.

The survey was launched in early-January and closed January 20, 2011. Of the 808 initial invitations sent via email 22 were undeliverable. From the 786 delivered survey invitations 321survey responses were received, from 319 companies. This response rate of 40% is an increase of nearly 20% from the prior survey in January 2010.

Survey responses are presented in this report as reported by *Zoomerang*, the web-survey service firm used in this endeavor. When appropriate, comments are made throughout the report regarding survey responses and industry trending.

## CONFIDENTIALITY

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## SURVEY REPORT INDEX

## KEY INSIGHTS FROM SURVEY

1. Corporate moves in 2011 are anticipated to be 8% higher than 2010.
2. 69% of corporations contract with moving service providers.
3. 75% of corporations have lists of suppliers considered to be "preferred" HHG carriers.
4. 75% of corporations maintain traditional forms of pricing, 25% use single factor rate pricing. However, 68% would consider using an alternative pricing model in the future.
5. 23% of corporate managers believe sustainability is "very important" for this industry, another 51% score sustainability as "important."
6. 60% of corporations either do not provide nor do they anticipate providing alternative methods of household goods shipments, like container services or self-pack-and-load methods. Whereas, 41% – a substantial increase from last year – are considering these alternative approaches on either small load or short distance moves due to cost savings, employee satisfaction and lower claim rates.
7. Most corporations depend on the relocation management company or a move management company to completely administer the HHG program. Of those corporations using this middle-man model, overall satisfaction with the relocation company/move manager was an average score of 8.18 and net satisfaction of 38% – both relatively low metrics of satisfaction.
8. 25% of corporations changed a supplier on the preferred moving service provider list during the last year; this is lower than the rate of change last year. Of the corporations making a change 42% used an RFP approach to change preferred suppliers.
9. For corporations having a preferred supplier list there are an average of 2.51 firms on the list. Also, 84% of companies have either 1 or 2 or 3 suppliers on the preferred list.
10. United Van Lines continues to generate the most evaluations in this annual survey. This year 16 moving service suppliers generated 3 or more evaluations from the corporate relocation managers.
11. Industry overall satisfaction declined this year compared to the prior year.
12. Four firms excelled in "overall satisfaction": Budd, New World, United and Atlas.
13. The top firms in "willingness to recommend," all with excellent or near-excellent ratings, were Budd, NorthAmerican, United, Atlas and Allied.
14. High scores for transferee satisfaction were recorded by Budd and United.
15. Four firms scored very high in pricing structures: Budd, Crown, Clark & Reid and NorthAmerican.
16. Two firms scored in the "excellent" range for performing background checks on field personnel: Clark & Reid and NorthAmerican.
17. Many firms scored very high evaluations on "financial stability:" NorthAmerican, Budd, Allied, Atlas and Clark & Reid.

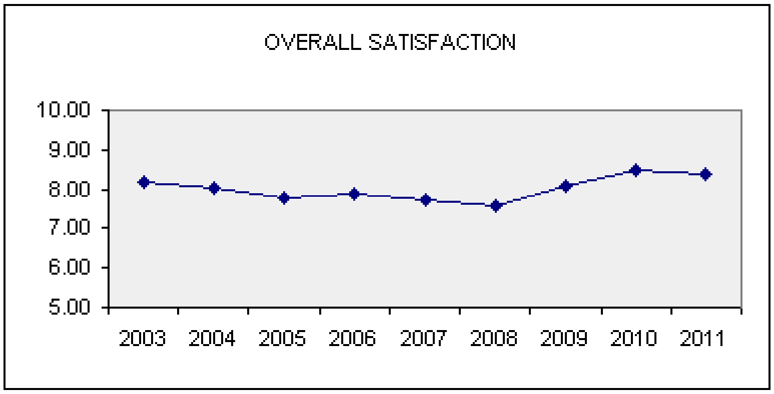
## PRESENTATION OF CHARTS AND SURVEY TABLES

Throughout this report charts and tables show all HHG carriers evaluated by three or more corporate clients. Tables generally show the number of corporate relocation managers providing evaluations, the average score (10-point scale), the percent of top-block scores (a 10 or 9), percent of bottom-block (scores of 1 through 6) and "net satisfaction" percent (difference between top-block and bottom-block). Carriers are listed in alphabetical order; see the example:

| EXAMPLE ONLY | # of Contracts | Average Score | Top Block % | Bottom Block % | Net Satis. % |
|---|---|---|---|---|---|
| A. Arnold | 8 | 7.00 | 50% | 38% | 13% |
| Allied Worldwide | 62 | 8.18 | 63% | 11% | 52% |

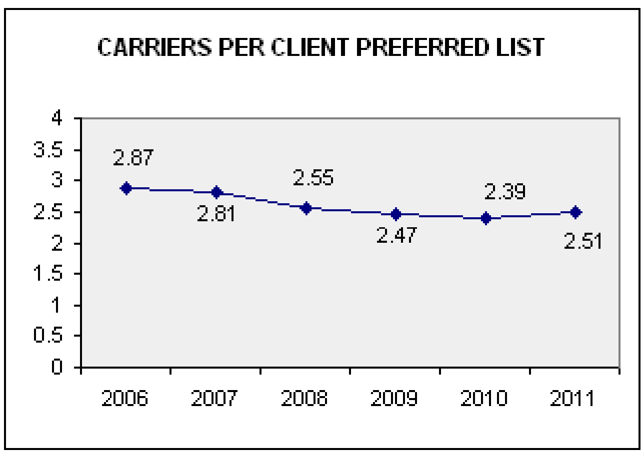
## TWO HHG INDUSTRY TRENDS

The following chart shows the HHG industry performance, as measured in the *Relocation Mangers' Survey*©, for the last nine years on "overall corporate client satisfaction." Data shown is the industry average score on a ten-point scale.




The HHG industry earned an average score of 8.39 (10 high scale) in this year's survey. Although this is the third consecutive year the industry collectively exceeded the 8.0 satisfaction metric this was the first decrease, albeit slight, in client satisfaction over the same three-year period.

One trend was reversed in the 2011 survey – there was an increase in size of preferred carrier lists. The average increased to 2.51 carriers per each corporate preferred list. The chart reflects the average size of the preferred lists maintained by corporations over the past 6 years.




It must be noted, as shown on page 11 of the report, 28% of corporations do not have a list of "preferred" moving service suppliers. These firms rely on the relocation management firm or move management firm to manage the transportation process without regard to corporate contracts or preferences.

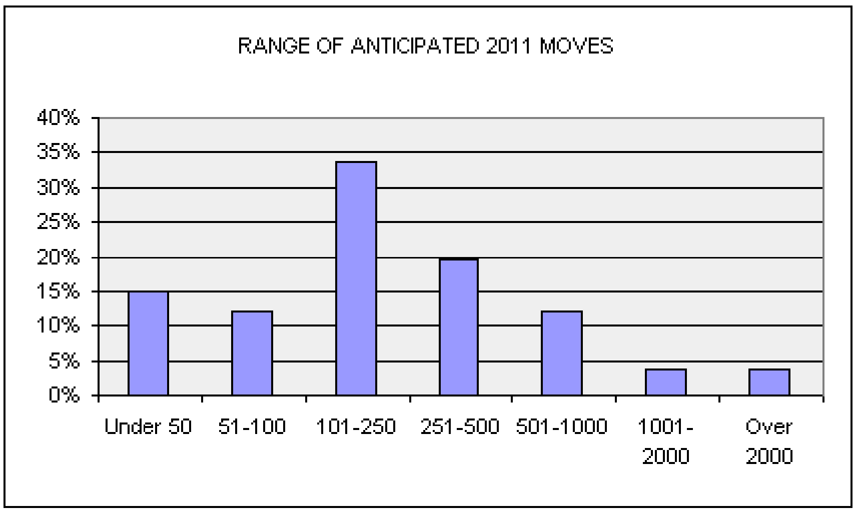
## COMPANY PROFILE AND ADMINISTRATION OF HHG

**Question – What is your anticipated domestic annual move range for 2011?**

This chart shows the anticipated 2011 ranges of domestic (USA) volume and % of companies participating in the survey.

| Your anticipated domestic annual move range (all moves, homeowners and renters) for 2011? | | |
|---|---|---|
| Under 50 | 48 | 15% |
| 51-100 | 39 | 12% |
| 101-250 | 108 | 34% |
| 251-500 | 63 | 20% |
| 501-1000 | 39 | 12% |
| 1001-2000 | 12 | 4% |
| Over 2000 | 12 | 4% |
| **Total** | 321 | 100% |

This mix of volume ranges is approximately 8% higher than last years' volume. Approximately 20% of corporations move over 500 per year compared with 18% last year. Further, last year only 66% of survey participants moved under 250; this year the 61% of the participants move under 250.



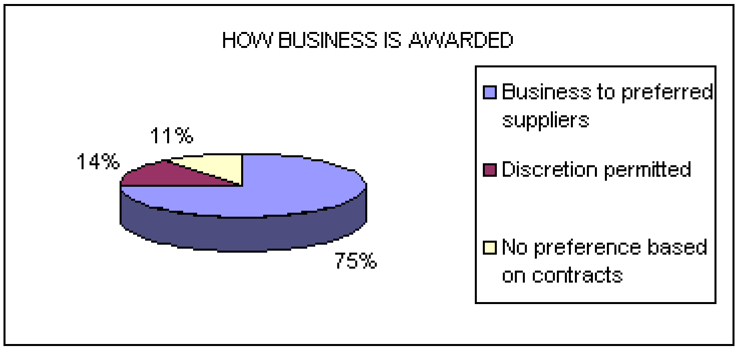

## MANAGEMENT OF MOVING SERVICE CONTRACTS

**Question – Does your company hold the contract with the moving services providers?**

Over two-thirds of corporations contract with carriers.

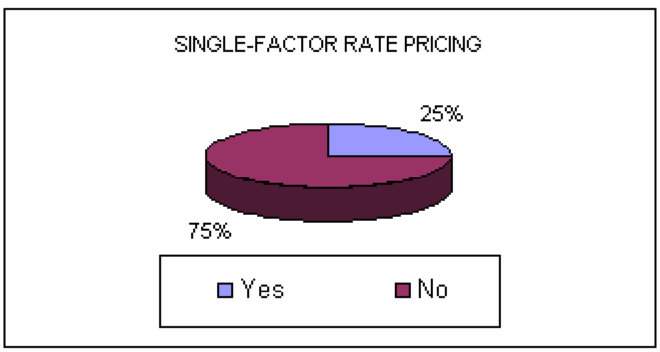
| Does your company hold the contracts with the moving services providers? | | |
|---|---|---|
| Yes | 219 | 69% |
| No | 100 | 31% |
| **Total** | 319 | 100% |

**Question – Do you direct all or part of your business to preferred suppliers?**
Approximately three-quarters of corporations expect moves to go to preferred moving suppliers, and another 14% permit the move manager or relocation services firm to use discretion and go off-list. Only 11% award business to carriers without prior obligations to honor contracts or preferences.




## PRICING OF CURRENT MOVING SERVICE TRANSACTIONS

**Question – Do you use single-factor rate pricing with any of your moving service providers?**
Approximately three-quarters of corporations (226 of 301 participants) do not use this approach to pricing/paying for moving services.




**Question – Would you consider using single factor rate as a pricing alternative if offered?**
Approximately two-thirds of corporations (68%) of participants in the survey would consider this pricing option in conducting future moving services relationships.

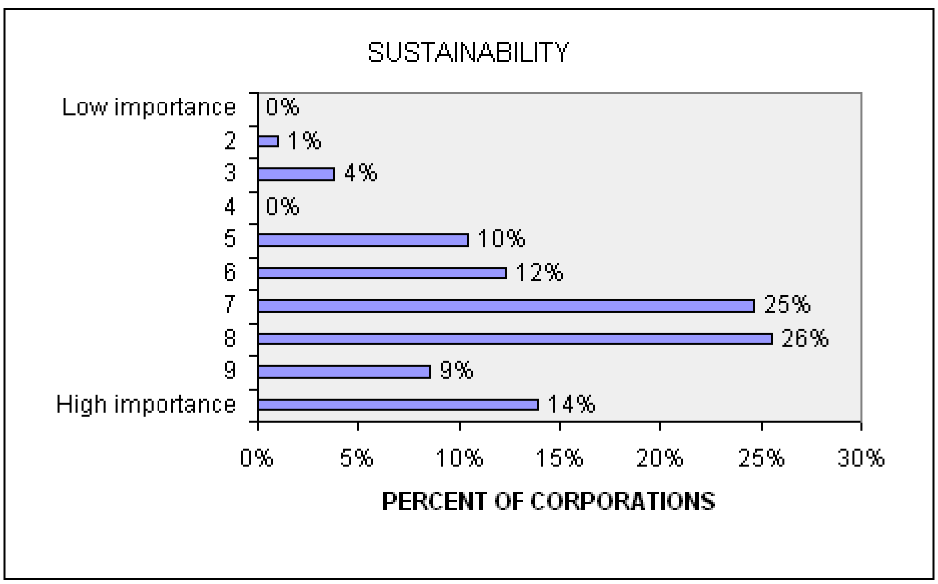
| **If offered would you use or consider using a "single factor rate" format for pricing as an alternative to the traditional discounting from the 400N tariff?** | | |
|---|---|---|
| Yes, would consider using single rate factor pricing | 192 | 68% |
| No, would not consider this form of pricing | 90 | 32% |
| **Total** | 282 | 100% |

**Question – How do you currently pay for moving services transactions?**
Slightly more than one-half (56%) currently use the traditional form of pricing for moving service transactions.

| **If you are not on a single rate factor pricing model, then how do you pay for packing and materials?** | | |
|---|---|---|
| Pay custom (per unit) | 63 | 28% |
| Pay per hundred-weight (full) | 126 | 56% |
| Another method of paying not described above | 36 | 16% |
| **Total** | 225 | 100% |

## IMPORTANCE OF SUSTAINABILITY AND ENVIRONMENT-FRIENDLY PRACTICES

**Question – How important is it to you the moving services providers practice sustainability and environmental-friendly practices?**
Approximately 23% corporate relocation managers believe it is "extremely important" for the industry to practice sustainability and environmental-friendly practices, and another 51% give this business practice moderately high levels of importance.




## ALTERNATIVE BUSINESS PRACTICES & LUMP SUM PROGRAMS

**Question – Do you anticipate using alternative approaches to the shipment of household goods in 2011, such as container-type services or self-pack and load services?**
The retail market has expanded with the new offerings available to consumers such as the Portable On Demand Services or the Self Pack & Load services offered by many full service moving service providers. Are corporate managers picking up on this trend?

CONTINUED NEXT PAGE >

| Do you anticipate using or are you currently using alternative approaches to HHG shipment in 2011? These alternatives might include container-type products/services such as PODS, ABF or other Self-Pack and Load services offered by many moving services providers. | | |
|---|---|---|
| No; we do not provide these alternatives now or are we anticipating this in 2011 | 191 | 60% |
| Yes, we are currently providing this form of shipment as part of our transfer program | 63 | 20% |
| Yes, we are considering this form of shipment to become an element/alternative in our program | 66 | 21% |
| **Total** | 320 | 100% |

A strong majority of 60% do not offer these alternative approaches to the employee nor do they anticipate providing this as a future benefit alternative to moving the household goods. On the other hand, either 20% already offer this alternative and another 21% are considering this as an alternative in the future.

Last year this same question generated a response of 81% not offering or expecting to offer this service. Overwhelmingly, the number of firms considering this or already using this has significantly increased from a year earlier; from 19% up to 41%.

**Question – For companies using these alternative approaches do you have the service provider direct bill your company?**

More than 80% of companies use a direct billing feature for these alternative approaches to household goods shipments.

| For the self-move shipments (via U-Haul, PODS or ABF for example) do you have the service provider direct bill your company? | | |
|---|---|---|
| Yes | 51 | 81% |
| No | 12 | 19% |
| **Total** | 63 | 100% |

**Question – When your employees use these self pack and load alternatives, does your company believe the activity exposes the company to a liability or Workmen's Comp situation if the individual is injured?**

Of the firms using these alternatives involving high levels of activity by the employee 70% of the companies do not believe there is a liability or a Workmen's Comp exposure.

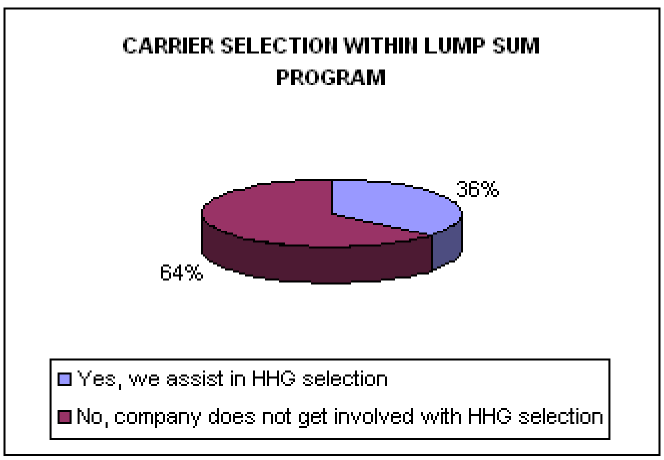
| When your employee uses a self-move service provider does your organization believe this exposes the company to a liability or Workers Comp issue if the employee is injured performing the self-move process? | | |
|---|---|---|
| Yes | 18 | 30% |
| No | 42 | 70% |
| **Total** | 60 | 100% |

**Question – Does self-move alternatives add or detract from employee satisfaction?**
Among the firms offering this alternative, 53 of 63 survey participants provided voluntary answers to this question.

**From your perspective, how has the self-move shipment approach added or detracted from overall employee satisfaction with the move experience?**

Most comments from the voluntary answers fall into four responses:
1. The few firms using domestic container services state the satisfaction level is high: lower costs, lower claims rate and improved customer satisfaction.
2. Self pack and move services are generally well accepted, especially among "lower level" employees who prefer the flexibility and possible opportunity to minimize use of lump sum payments.
3. Alternative methods work best when used for either small shipments or short distance moves.
4. Employees with a choice (self move versus full pack and load) are advised any issues and problems are their responsibility, not the employers, if the use the alternative method.

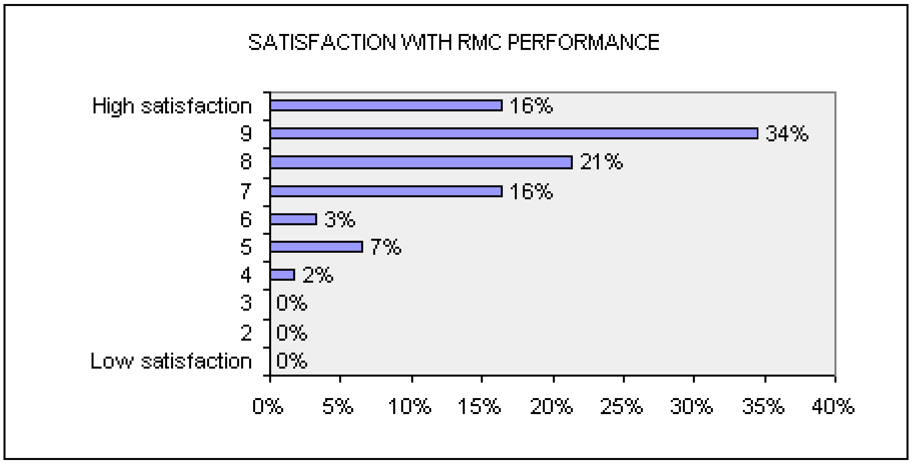
**Question – If you have a lump sum program including HHG coverage, then do you get involved with carrier selection?**
Among firms with a lump sum program, slightly less than two-thirds are not involved with the HHG carrier selection.




**Question – If you have a lump sum program then explain how you treat the tax portion of HHG if covered by the lump sum.**
Over 100 firms gave a response to this open ended question. Results fall into five categories:
1. Approximately 40% of the companies give one lump sum amount intended in part for shipment of household goods and gross-up the amount regardless of how the employee uses the payment.
2. Approximately 25% of companies give a lump sum and also HHG service.
3. Approximately 20% give a lump sum and do not gross up the payment. The employee is eligible to use their HHG cost as a tax deduction.
4. Less than 10% pay directly the first $X of HHG costs and the employee pays the balance.
5. Less than 5% give a lump sum not intended for HHG (temp living and final move intended) and do not gross up the payment.

## USING A MOVE MANAGER OR RELOCATION MANAGEMENT COMPANY

**Question – If you use a relocation management company for HHG administration, how satisfied are you with the performance and value received?**
Because many corporation use a middle-man to administer the moving services transaction this question is intended to evaluate satisfaction with the supplier management performance of the relocation management companies.




Only 50% of corporations gave a top-block score of 10 (high satisfaction) or 9 to this question, and net satisfaction (top block less bottom block of 1 thru 6) was a low 38%. The average score was 8.18 (10-high scale). Generally, this outcome reflects passive satisfaction with the relocation management companies' performance managing the moving services networks and client contracts.

Among the most often named suppliers Altair and Sirva scored well above the industry average score, Cartus and Weichert near the industry average, and other firms slightly lower than the industry average.

**Question – Is an on-line bid-type model used for the selection of a moving service provider for employee moves?**
The large majority of corporations do not use this type of process to select a carrier for an individual's move, nor does the firm which manages the HHG business in their behalf.

| **Do you, your move management company or your relocation management company use on-line, bid-type models for the selection of a service provider for your employees moves?** | | |
|---|---|---|
| Yes | 51 | 18% |
| No | 239 | 82% |
| **Total** | 290 | 100% |

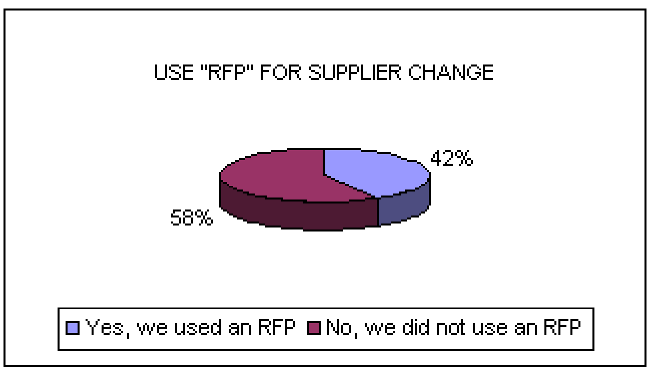
## CHANGING MIX OF MOVING SERVICES PROVIDERS

**Question – Over the last year have you changed the mix of preferred moving service suppliers?**
A small majority of corporations did not change moving service suppliers this past year.

| Over the past year have you changed the mix of preferred moving services suppliers? You can select as many of the choices below as appropriate. | | |
|---|---|---|
| Not an appropriate question because our move management company (or relocation management company) administers our program | 60 | 20% |
| We added one or more new moving service providers to our list | 42 | 14% |
| We removed one or more moving service providers from our list | 33 | 11% |
| No change; we use the same moving service providers as a year ago | 168 | 55% |

Only one-quarter of all firms in the survey made a change to the preferred list of moving service providers during the last year.

**Question – If you changed moving services suppliers did you use and RFP?**
A small majority of 58% of corporations did not use an RFP when they changed suppliers.

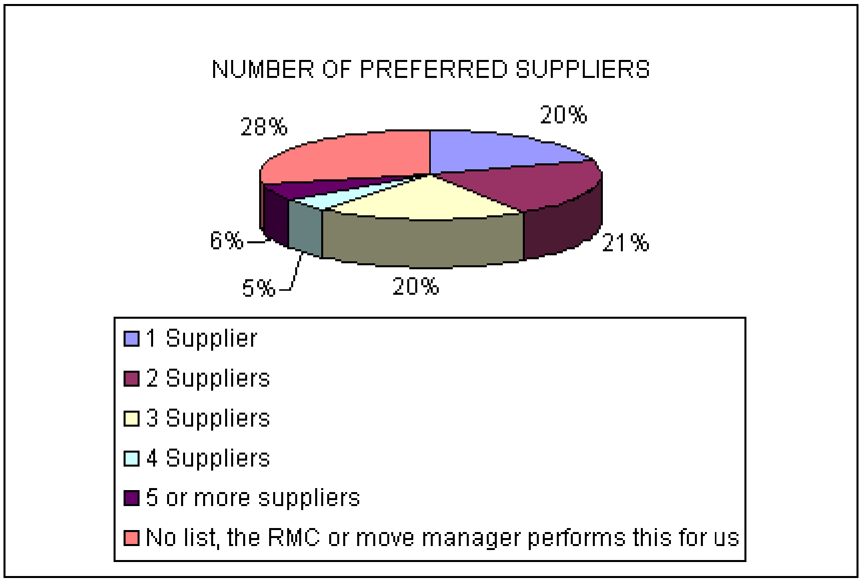



**Question – How many moving service providers are on your preferred list?**
Among corporations having a list of preferred suppliers a 61% majority has 3 or fewer suppliers on the preferred list of moving services firms. Overall, nearly three-quarters (72%) have a preferred supplier list.

| How many moving service providers are on your preferred list? | | |
|---|---|---|
| 1 Supplier | 63 | 20% |
| 2 Suppliers | 66 | 21% |
| 3 Suppliers | 63 | 20% |
| 4 Suppliers | 15 | 5% |

| | | |
|---|---|---|
| 5 or more suppliers | 19 | 6% |
| No list, the RMC or move manager performs this for us | 89 | 28% |
| **Total** | 315 | 100% |

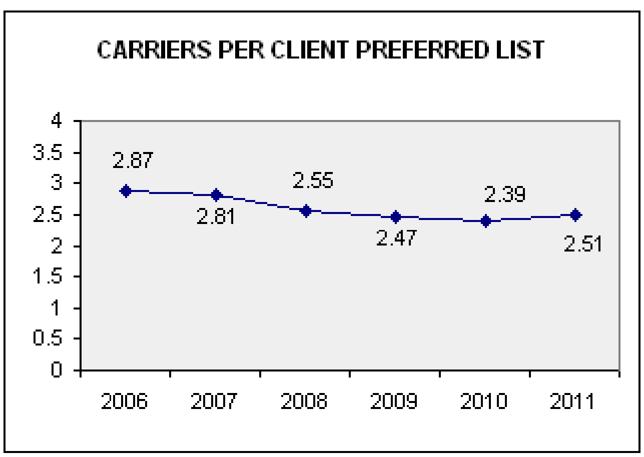
Well over one-quarter (28%) of corporations do not have a preferred list.  These firms rely on the relocation management company or move manager to oversee the shipment business.




Approximately 85% of firms with a preferred list have either 1 or 2 or 3 suppliers on the list.

The data indicates among all corporations stating they do have a preferred moving services carrier list the average size is 2.51 carriers per corporation preferred supplier list.   This is slightly higher than last year (see chart below).

The trend of moving services providers shows this trend the past 6 years:



# MOVING SERVICE SUPPLIER PERFORMANCE

## SUPPLIERS' CONTRACTS & SHARE OF BUSINESS

The survey results indicate most responding companies split their business among multiple carriers. Even among the corporations with out a preferred list the move management firm likely uses multiple carriers to handle the companies' shipment of household goods.

The following chart shows the carriers' size relative to the number of evaluations submitted on each carrier.

| | Corporations Evaluating Carrier | % of 751 evaluations |
|---|---|---|
| 1. United | 195 | 26% |
| 2. Atlas | 139 | 19 |
| 3. Allied | 118 | 16 |
| 4. Graebel | 56 | 7 |
| 5. Budd | 53 | 7 |
| 6. NorthAmerican | 33 | 4 |
| 7. Mayflower | 27 | 4 |
| 8. Paul Arpin | 26 | 3 |
| 9. New World | 21 | 3 |
| 10. Crown | 16 | 2 |
| 11. Clark & Reid | 15 | 2 |
| 12. Bekins | 11 | 1 |
| 13. A. Arnold | 10 | 1 |
| 14. Stevens | 4 | <1 |
| 15. Victory | 4 | <1 |
| 16. Wheaton | 3 | <1 |
| 16. all other carriers | 20 | 3 |
| # Evaluations: | 751 | 100% |

The largest share of survey evaluations is United Van Lines – 26% of the corporations in this survey evaluated the services of a United agent (195 companies of 321 survey participants). The three large firms, United, Atlas and Allied, dominated the share of evaluations – 61% of the evaluations were returned on these 3 firms.

Additionally, the "evaluation share" is a good proxy for contract-share. Dividing evaluations returned in the survey by 321 corporations participating indicates approximate contract-share among these same moving service suppliers. For example, United with 195 evaluations submitted by 321 total participants indicate United has a contract-share of 61%. This is close to the size of contract-share last year.

## PERFORMANCE - CORPORATE CLIENT SATISFACTION

Due to the mix of participating companies and the carriers used for HHG services many carriers had a very few number of relocation manager participate in the survey. The charts on the following pages show the firms with 3 or more clients participating in the survey.

Two metrics are used throughout the report to show successful performance. Using a 10-point scale, 1 low to 10 high, the primary reporting metric is Average Score. The other metric is "Net Satisfaction" which is simply calculated by taking the percentage of scores of 10 and 9 ("top block" on the ten-point scale) and subtracting the percentage of scores in the 1 to 6 score range ("bottom block'). Most quality and customer satisfaction studies indicate a Net Satisfaction score of 70% or higher or an average score of 9 or higher are excellent performance indicators.

**<u>Question – “What is your level of satisfaction with the overall performance of the carriers you currently use?”</u>**

The survey respondents’ scores generated the following outcomes.

| | Scores > | | | | | | | | | | # of | Average | Top | Bottom | Net |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* | Evaluations | Score | Block % | Block % | Satis. % |
| A. Arnold | 1 | | | | 1 | | 3 | 4 | 1 | | 10 | 6.80 | 10% | 20% | -10% |
| Allied Worldwide | | | | 2 | 2 | 2 | 6 | 44 | 31 | 31 | 118 | 8.58 | 53% | 5% | 47% |
| Atlas Van Lines | | | 1 | 1 | 3 | 2 | 19 | 23 | 50 | 40 | 139 | 8.64 | 65% | 5% | 60% |
| Bekins Van Lines | 1 | | | | | 1 | 2 | 4 | 3 | | 11 | 7.27 | 27% | 18% | 9% |
| Budd Van Lines | | | | | | | 12 | 6 | 16 | 19 | 53 | 8.79 | 66% | 0% | 66% |
| Clark & Reid | | | | | 1 | 2 | 4 | 4 | 1 | 3 | 15 | 7.73 | 27% | 20% | 7% |
| Crown Van Lines | | | | | | | 7 | 5 | 3 | 1 | 16 | 7.88 | 25% | 0% | 25% |
| Graebel Company | | | 1 | | 4 | 3 | 19 | 22 | 4 | 3 | 56 | 7.43 | 13% | 14% | -2% |
| Mayflower | | | | | 1 | 4 | 5 | 8 | 9 | | 27 | 7.74 | 33% | 19% | 15% |
| New World Van Lines | | | | | | | 2 | 5 | 10 | 4 | 21 | 8.76 | 67% | 0% | 67% |
| NorthAmerican | | | | | | | 13 | 7 | 7 | 6 | 33 | 8.18 | 39% | 0% | 39% |
| Paul Arpin Van Lines | | | | | | 3 | 8 | 4 | 10 | 1 | 26 | 7.92 | 42% | 12% | 31% |
| Stevens Van Lines | | | | | | | 1 | 1 | 1 | 1 | 4 | 8.50 | 50% | 0% | 50% |
| United Van Lines | | | | | 3 | 5 | 13 | 52 | 79 | 43 | 195 | 8.68 | 63% | 4% | 58% |
| Victory Worldwide | | | | | | | 1 | | 2 | 1 | 4 | 8.75 | 75% | 0% | 75% |
| Wheaton Van Lines | | 1 | | | | 1 | | 1 | | | 3 | 5.33 | 0% | 67% | -67% |
| Other not listed | | | | | | 2 | 3 | 5 | 6 | 4 | 20 | 8.35 | 50% | 10% | 40% |
| HHG INDUSTRY> | 2 | 1 | 2 | 3 | 15 | 25 | 118 | 195 | 233 | 157 | 751 | 8.39 | 52% | 6% | 46% |

| | |
|---|---|
| AVERAGE SCORE | 8.39 |
| TOP BLOCK | 52% |
| BOTTOM BLOCK | 6% |
| NET SATISFACTION | 46% |

Among the <u>5 best performing</u> firms in the survey with meaningful number of surveys:

| <u>Carrier</u> | <u>Net Satisfaction</u> | <u>Average Score</u> |
|---|---|---|
| Budd (53 evaluations) | 66% | 8.79 |
| New World (21 surveys) | 67 | 8.76 |
| United (195 surveys) | 58 | 8.68 |
| Atlas (139 surveys) | 60 | 8.64 |
| Allied (118 surveys) | 47 | 8.58 |
| **INDUSTRY AVERAGE** | **46%** | **8.39** |

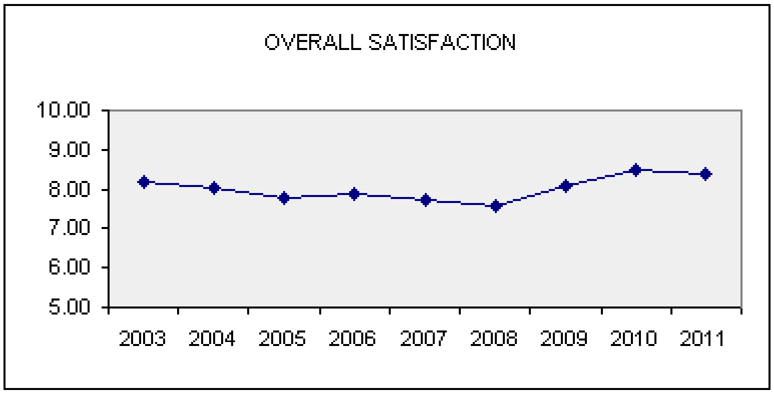
No firm achieved “excellence” among those with a meaningful participation rate.

Budd and New World, among the larger moving service providers, had the highest average and highest net satisfaction percentage performance metrics.

Among the <u>3 largest</u> moving services companies the performance metrics were:

| <u>Carrier</u> | <u>Net Satisfaction</u> | <u>Average Score</u> |
|---|---|---|
| United (195 surveys) | 58% | 8.68 |
| Atlas (139 surveys) | 60 | 8.64 |
| Allied (118 surveys) | 47 | 8.58 |
| **INDUSTRY AVERAGE** | **46%** | **8.39** |

Over the 9 year history the moving services industry has improved corporate client satisfaction 2 of the last 3 years; although 2011 average satisfaction dipped slightly from the prior year.




**Question – "How willing are you to recommend the HHG carrier you currently use to a relocation manager or associate?"**

Nearly every survey participant evaluated the carriers on this question.

| | Scores > | | | | | | | | | | # of | Average | Top | Bottom | Net |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* | Evaluations | Score | Block % | Block % | Satis. % |
| A. Arnold | 1 | 0 | 0 | 0 | 0 | 1 | 1 | 1 | 3 | 2 | 9 | 7.67 | 56% | 22% | 33% |
| Allied Worldwide | 3 | 0 | 0 | 0 | 2 | 2 | 7 | 15 | 41 | 36 | 106 | 8.71 | 73% | 7% | 66% |
| Atlas Van Lines | 2 | 1 | 1 | 0 | 2 | 3 | 8 | 11 | 42 | 51 | 121 | 8.82 | 77% | 7% | 69% |
| Bekins Van Lines | 1 | 0 | 0 | 0 | 1 | 0 | 2 | 4 | 1 | 1 | 10 | 7.10 | 20% | 20% | 0% |
| Budd Van Lines | 0 | 0 | 0 | 0 | 0 | 0 | 2 | 6 | 22 | 17 | 47 | 9.15 | 83% | 0% | 83% |
| Clark & Reid | 0 | 0 | 0 | 0 | 1 | 0 | 1 | 4 | 4 | 3 | 13 | 8.46 | 54% | 8% | 46% |
| Crown Van Lines | 0 | 0 | 0 | 0 | 0 | 0 | 4 | 2 | 8 | 1 | 15 | 8.40 | 60% | 0% | 60% |
| Graebel Company | 0 | 0 | 1 | 1 | 2 | 1 | 9 | 13 | 12 | 11 | 50 | 8.16 | 46% | 10% | 36% |
| Mayflower | 1 | 0 | 1 | 0 | 0 | 0 | 2 | 2 | 11 | 5 | 22 | 8.32 | 73% | 9% | 64% |
| New World Van Lines | 0 | 0 | 0 | 0 | 0 | 0 | 4 | 3 | 8 | 4 | 19 | 8.63 | 63% | 0% | 63% |
| NorthAmerican | 0 | 0 | 0 | 0 | 1 | 0 | 2 | 4 | 12 | 8 | 27 | 8.85 | 74% | 4% | 70% |
| Paul Arpin Van Lines | 0 | 0 | 0 | 0 | 0 | 1 | 6 | 9 | 7 | 1 | 24 | 8.04 | 33% | 4% | 29% |
| Stevens Van Lines | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 0 | 1 | 1 | 3 | 8.67 | 67% | 0% | 67% |
| United Van Lines | 1 | 1 | 0 | 0 | 1 | 1 | 9 | 37 | 73 | 49 | 172 | 8.84 | 71% | 2% | 69% |
| Victory Worldwide | 0 | 0 | 0 | 0 | 0 | 1 | 0 | 1 | 0 | 1 | 3 | 8.00 | 33% | 33% | 0% |
| Wheaton Van Lines | 0 | 0 | 0 | 0 | 1 | 0 | 1 | 1 | 0 | 0 | 3 | 6.67 | 0% | 33% | -33% |
| Other not listed | 1 | 0 | 0 | 0 | 0 | 1 | 5 | 4 | 1 | 5 | 17 | 7.82 | 35% | 12% | 24% |
| HHG INDUSTRY> | 10 | 2 | 3 | 1 | 11 | 11 | 64 | 117 | 246 | 196 | 661 | 8.63 | 67% | 6% | 61% |

| | |
|---|---|
| AVERAGE SCORE | 8.63 |
| TOP BLOCK | 67% |
| BOTTOM BLOCK | 6% |
| NET SATISFACTION | 61% |

Among the 5 best performing firms in the survey with meaningful number of surveys:

| Carrier | Net Satisfaction | Average Score |
|---|---|---|
| Budd (53 evaluations) | 83% | 9.15 |
| NorthAmerican (27 surveys) | 70 | 8.85 |
| United (195 surveys) | 69 | 8.84 |
| Atlas (139 surveys) | 69 | 8.82 |
| Allied (106 surveys) | 66 | 8.71 |
| **INDUSTRY AVERAGE** | **61%** | **8.63** |

Budd and NorthAmerican achieved "excellence" among those with a meaningful participation rate in the "willingness to recommend" question, with United and Atlas in near-excellent range.

Among the 3 largest moving services companies the performance metrics were:

| Carrier | Net Satisfaction | Average Score |
|---|---|---|
| United (195 surveys) | 69 | 8.84 |
| Atlas (139 surveys) | 69 | 8.82 |
| Allied (106 surveys) | 66 | 8.71 |
| **INDUSTRY AVERAGE** | **61%** | **8.63** |

**Question – "Regardless of which firm/carrier you use, which firm do you believe has the greatest reputation in the industry for overall quality?"**

Does perception match reality when service quality is questioned?

| **Which firm, regardless of whether you use the firm or not, do you believe has the greatest reputation for overall quality of service to the customer? Select only one firm.** | |
|---|---|
| United | 23% |
| Budd | 17% |
| Atlas | 14% |
| Allied | 7% |
| New World | 7% |
| Clark & Reid | 6% |
| Graebel | 6% |
| NorthAmerican | 4% |
| Bekins | 1% |
| Paul Arpin | 1% |
| Victory | 1% |
| A. Arnold | 0% |
| Crown | 0% |
| Mayflower | 0% |
| Stevens Van Line | 0% |
| Wheaton | 0% |
| OTHER | 10% |
| **Total** | 100% |

Among all carriers in the survey, United enjoys the greatest reputation for having the highest or best quality service. This is the sixth consecutive year United earned this distinction.

A number of other firms also were recognized by corporate relocation managers for having a high quality reputation: Budd and Atlas.

**Question – "How satisfied are you with the carrier(s)' ability to deliver maximum transferee satisfaction?"**

Most individuals participating in the survey answered this question.

| | Scores > 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | # of Evaluations | Average Score | Top Block % | Bottom Block % | Net Satis. % |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| A. Arnold | 0 | 0 | 0 | 0 | 1 | 0 | 5 | 2 | 1 | 0 | 9 | 7.22 | 11% | 11% | 0% |
| Allied Worldwide | 0 | 1 | 0 | 1 | 3 | 5 | 13 | 24 | 39 | 21 | 107 | 8.36 | 56% | 9% | 47% |
| Atlas Van Lines | 0 | 0 | 0 | 1 | 1 | 4 | 16 | 22 | 32 | 45 | 121 | 8.75 | 64% | 5% | 59% |
| Bekins Van Lines | 0 | 0 | 1 | 0 | 0 | 0 | 3 | 4 | 1 | 0 | 9 | 7.22 | 11% | 11% | 0% |
| Budd Van Lines | 0 | 0 | 0 | 0 | 0 | 0 | 6 | 5 | 17 | 19 | 47 | 9.04 | 77% | 0% | 77% |
| Clark & Reid | 0 | 0 | 0 | 0 | 0 | 1 | 3 | 3 | 3 | 3 | 13 | 8.31 | 46% | 8% | 38% |
| Crown Van Lines | 0 | 0 | 0 | 0 | 0 | 0 | 4 | 5 | 4 | 1 | 14 | 8.14 | 36% | 0% | 36% |
| Graebel Company | 0 | 0 | 0 | 0 | 0 | 7 | 15 | 18 | 11 | 2 | 53 | 7.74 | 25% | 13% | 11% |
| Mayflower | 0 | 0 | 0 | 0 | 1 | 1 | 3 | 10 | 6 | 3 | 24 | 8.17 | 38% | 8% | 29% |
| New World Van Lines | 0 | 0 | 0 | 0 | 0 | 0 | 6 | 7 | 1 | 5 | 19 | 8.26 | 32% | 0% | 32% |
| NorthAmerican | 0 | 0 | 0 | 0 | 0 | 1 | 4 | 7 | 11 | 8 | 31 | 8.68 | 61% | 3% | 58% |
| Paul Arpin Van Lines | 0 | 0 | 0 | 1 | 0 | 1 | 8 | 6 | 5 | 2 | 23 | 7.78 | 30% | 9% | 22% |
| Stevens Van Lines | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 0 | 1 | 1 | 3 | 8.67 | 67% | 0% | 67% |
| United Van Lines | 0 | 0 | 0 | 0 | 3 | 2 | 15 | 39 | 66 | 55 | 180 | 8.82 | 67% | 3% | 64% |
| Victory Worldwide | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 1 | 1 | 3 | 9.00 | 67% | 0% | 67% |
| Wheaton Van Lines | 0 | 0 | 0 | 0 | 1 | 0 | 0 | 2 | 0 | 0 | 3 | 7.00 | 0% | 33% | -33% |
| Other not listed | 0 | 0 | 0 | 0 | 1 | 3 | 2 | 3 | 4 | 5 | 18 | 8.17 | 50% | 22% | 28% |
| HHG INDUSTRY> | 0 | 1 | 1 | 3 | 11 | 25 | 104 | 158 | 203 | 171 | 677 | 8.49 | 55% | 6% | 49% |

| | |
|---|---|
| AVERAGE SCORE | 8.49 |
| TOP BLOCK | 55% |
| BOTTOM BLOCK | 6% |
| NET SATISFACTION | 49% |

Among the 5 best performing firms in the survey with meaningful number of surveys:

| Carrier | Net Satisfaction | Average Score |
|---|---|---|
| Budd (47 evaluations) | 77% | 9.04 |
| United (180 surveys) | 64 | 8.82 |
| Atlas (121 surveys) | 59 | 8.75 |
| NorthAmerican (31 surveys) | 58 | 8.68 |
| Allied (107 surveys) | 47 | 8.36 |
| **INDUSTRY AVERAGE** | **49%** | **8.49** |

Budd achieved "excellence" in providing transferee with a satisfying experience among those with a meaningful participation rate; United achieved near-excellence.

**Question – "How satisfied are you the price/fee/discount, pricing structure/complexity and pricing philosophy of your carrier(s)?"**

Pricing has been dissatisfaction for corporate relocation managers over the past few years.

Scores > # of Average Top Bottom Net

| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | Evaluations | Score | Block % | Block % | Satis. % |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| A. Arnold | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 7 | 0 | 0 | 8 | 7.88 | 0% | 0% | 0% |
| Allied Worldwide | 1 | 1 | 0 | 0 | 3 | 8 | 7 | 31 | 34 | 17 | 102 | 8.23 | 50% | 13% | 37% |
| Atlas Van Lines | 1 | 0 | 0 | 0 | 2 | 1 | 28 | 35 | 36 | 23 | 126 | 8.31 | 47% | 3% | 44% |
| Bekins Van Lines | 1 | 0 | 0 | 0 | 1 | 0 | 0 | 5 | 1 | 1 | 9 | 7.22 | 22% | 22% | 0% |
| Budd Van Lines | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 5 | 23 | 19 | 47 | 9.30 | 89% | 0% | 89% |
| Clark & Reid | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 3 | 5 | 3 | 12 | 8.83 | 67% | 0% | 67% |
| Crown Van Lines | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 4 | 7 | 3 | 14 | 8.93 | 71% | 0% | 71% |
| Graebel Company | 0 | 0 | 1 | 1 | 2 | 3 | 13 | 13 | 10 | 2 | 45 | 7.56 | 27% | 16% | 11% |
| Mayflower | 0 | 0 | 0 | 0 | 1 | 2 | 4 | 8 | 6 | 1 | 22 | 7.86 | 32% | 14% | 18% |
| New World Van Lines | 0 | 0 | 0 | 0 | 0 | 1 | 1 | 8 | 5 | 2 | 17 | 8.35 | 41% | 6% | 35% |
| NorthAmerican | 0 | 0 | 0 | 0 | 1 | 0 | 2 | 5 | 14 | 5 | 27 | 8.70 | 70% | 4% | 67% |
| Paul Arpin Van Lines | 0 | 0 | 0 | 0 | 0 | 2 | 5 | 8 | 4 | 3 | 22 | 8.05 | 32% | 9% | 23% |
| Stevens Van Lines | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 3 | 0 | 0 | 3 | 8.00 | 0% | 0% | 0% |
| United Van Lines | 2 | 0 | 0 | 0 | 5 | 5 | 28 | 47 | 38 | 37 | 162 | 8.28 | 46% | 7% | 39% |
| Victory Worldwide | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 2 | 1 | 0 | 3 | 8.33 | 33% | 0% | 33% |
| Wheaton Van Lines | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 1 | 0 | 2 | 8.50 | 50% | 0% | 50% |
| Other not listed | 0 | 0 | 0 | 0 | 2 | 0 | 1 | 5 | 5 | 3 | 16 | 8.25 | 50% | 13% | 38% |
| HHG INDUSTRY> | 5 | 1 | 1 | 1 | 17 | 22 | 91 | 190 | 190 | 119 | 637 | 8.30 | 49% | 7% | 41% |

| | |
|---|---|
| AVERAGE SCORE | 8.30 |
| TOP BLOCK | 49% |
| BOTTOM BLOCK | 7% |
| NET SATISFACTION | 41% |

The respondents' scores generated an industry net satisfaction score of 41% and an average score of 8.30 – both metrics are higher than last year.

Among the 5 best performing firms in the survey with meaningful number of surveys:

| Carrier | Net Satisfaction | Average Score |
|---|---|---|
| Budd (47 evaluations) | 89% | 9.30 |
| Crown (14 surveys) | 71 | 8.93 |
| Clark & Reid (12 surveys) | 67 | 8.83 |
| NorthAmerican (27 surveys) | 67 | 8.70 |
| New World (17 surveys) | 35 | 8.35 |
| **INDUSTRY AVERAGE** | **41%** | **8.30** |

Budd achieved "excellence" in providing satisfying pricing models among those with a meaningful participation rate.

**Question – "How satisfied are you with your moving services suppliers performance of performing background checks on all their field service delivery personnel?**

A new questions this year focuses on the moving services suppliers performing background check on the personnel doing the pack & load operations.

| | Scores > | | | | | | | | | | # of | Average | Top | Bottom | Net |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | Evaluations | Score | Block % | Block % | Satis. % |
| A. Arnold | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 4 | 1 | 3 | 8 | 8.88 | 50% | 0% | 50% |
| Allied Worldwide | 3 | 3 | 0 | 0 | 8 | 10 | 7 | 19 | 26 | 33 | 109 | 8.02 | 54% | 22% | 32% |
| Atlas Van Lines | 1 | 0 | 0 | 1 | 1 | 5 | 27 | 26 | 26 | 33 | 120 | 8.34 | 49% | 7% | 43% |

| | | | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bekins Van Lines | 1 | 0 | 0 | 0 | 0 | 0 | 1 | 3 | 2 | 3 | 10 | 8.00 | 50% | 10% | 40% |
| Budd Van Lines | 0 | 0 | 0 | 0 | 2 | 2 | 3 | 7 | 17 | 14 | 45 | 8.71 | 69% | 9% | 60% |
| Clark & Reid | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 2 | 2 | 7 | 12 | 9.25 | 75% | 0% | 75% |
| Crown Van Lines | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 6 | 4 | 4 | 14 | 8.86 | 57% | 0% | 57% |
| Graebel Company | 0 | 0 | 0 | 1 | 0 | 2 | 17 | 11 | 11 | 3 | 45 | 7.82 | 31% | 7% | 24% |
| Mayflower | 1 | 0 | 0 | 1 | 3 | 2 | 4 | 4 | 4 | 3 | 22 | 7.18 | 32% | 32% | 0% |
| New World Van Lines | 0 | 0 | 0 | 0 | 0 | 0 | 2 | 5 | 8 | 2 | 17 | 8.59 | 59% | 0% | 59% |
| NorthAmerican | 0 | 0 | 0 | 0 | 0 | 1 | 2 | 4 | 5 | 15 | 27 | 9.15 | 74% | 4% | 70% |
| Paul Arpin Van Lines | 0 | 0 | 0 | 1 | 1 | 1 | 4 | 9 | 3 | 2 | 21 | 7.71 | 24% | 14% | 10% |
| Stevens Van Lines | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 2 | 1 | 0 | 3 | 8.33 | 33% | 0% | 33% |
| United Van Lines | 2 | 1 | 1 | 0 | 6 | 14 | 24 | 25 | 49 | 44 | 166 | 8.25 | 56% | 14% | 42% |
| Victory Worldwide | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 0 | 1 | 1 | 3 | 8.67 | 67% | 0% | 67% |
| Wheaton Van Lines | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 0 | 1 | 2 | 9.00 | 50% | 0% | 50% |
| Other not listed | 2 | 0 | 0 | 0 | 3 | 0 | 3 | 4 | 2 | 2 | 16 | 6.75 | 25% | 31% | -6% |
| HHG INDUSTRY> | 10 | 4 | 1 | 4 | 24 | 37 | 96 | 132 | 162 | 170 | 640 | 8.23 | 52% | 13% | 39% |

| | |
|---|---|
| AVERAGE SCORE | 8.23 |
| TOP BLOCK | 52% |
| BOTTOM BLOCK | 13% |
| NET SATISFACTION | 39% |

The results indicate the corporate relocation managers are relatively dissatisfied with the overall performance of the industry; average score is 8.23 and net satisfaction is 39%. This question earned the lowest industry scores among the attributes measured.

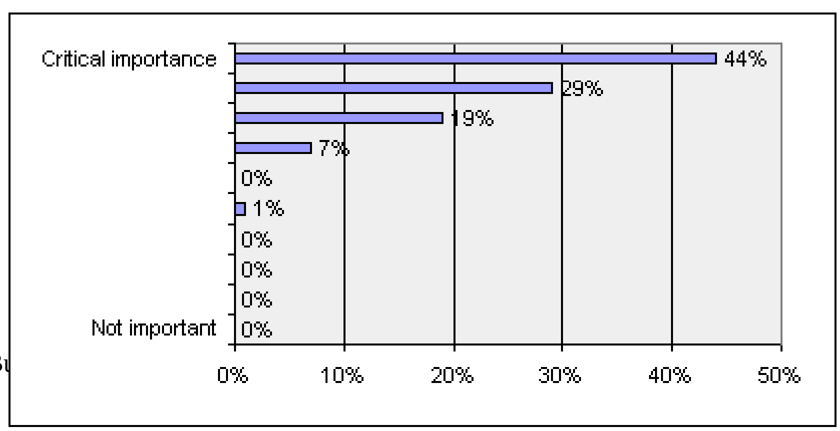
Among the 5 best performing firms in the survey with meaningful number of surveys:

| Carrier | Net Satisfaction | Average Score |
|---|---|---|
| Clark & Reid (12 surveys) | 75% | 9.25 |
| NorthAmerican (27 surveys) | 70 | 9.15 |
| Crown (14 surveys) | 57 | 8.86 |
| Budd (45 evaluations) | 60 | 8.71 |
| New World (17 surveys) | 59 | 8.59 |
| **INDUSTRY AVERAGE** | **39%** | **8.23** |

Clark & Reid and NorthAmerican achieved "excellence" in providing satisfying performance of background checks of the field personnel.

**Question – "How important is financial stability and soundness of your moving services providers?**

This is another new question this year focuses on the moving services suppliers' financial stability. Chart shows level/degree of importance for moving services suppliers having financial stability and soundness:



73% of relocation managers state it is very high importance for the moving services supplier to have sound financial stability.

**<u>Question – "How satisfied are you with financial stability and soundness of your moving services supplier?</u>**

This new question focuses on the financial stability of the moving services suppliers.

| | Scores > | | | | | | | | | | # of | Average | Top | Bottom | Net |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* | Evaluations | Score | Block % | Block % | Satis. % |
| A. Arnold | 1 | 0 | 0 | 0 | 1 | 1 | 2 | 2 | 1 | 1 | 9 | 6.78 | 22% | 33% | -11% |
| Allied Worldwide | 0 | 0 | 0 | 0 | 2 | 3 | 16 | 5 | 20 | 55 | 101 | 9.01 | 74% | 5% | 69% |
| Atlas Van Lines | 0 | 0 | 0 | 0 | 2 | 7 | 5 | 16 | 37 | 51 | 118 | 8.97 | 75% | 8% | 67% |
| Bekins Van Lines | 0 | 0 | 0 | 0 | 1 | 1 | 3 | 3 | 1 | 1 | 10 | 7.50 | 20% | 20% | 0% |
| Budd Van Lines | 0 | 0 | 0 | 0 | 0 | 0 | 2 | 7 | 17 | 21 | 47 | 9.21 | 81% | 0% | 81% |
| Clark & Reid | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 3 | 4 | 4 | 12 | 8.92 | 67% | 0% | 67% |
| Crown Van Lines | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 7 | 7 | 0 | 14 | 8.50 | 50% | 0% | 50% |
| Graebel Company | 0 | 0 | 0 | 0 | 1 | 2 | 3 | 16 | 15 | 9 | 46 | 8.50 | 52% | 7% | 46% |
| Mayflower | 0 | 0 | 0 | 0 | 0 | 2 | 3 | 5 | 6 | 6 | 22 | 8.50 | 55% | 9% | 45% |
| New World Van Lines | 0 | 0 | 0 | 0 | 0 | 0 | 3 | 2 | 8 | 5 | 18 | 8.83 | 72% | 0% | 72% |
| NorthAmerican | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 4 | 12 | 13 | 29 | 9.31 | 86% | 0% | 86% |
| Paul Arpin Van Lines | 0 | 0 | 0 | 0 | 0 | 0 | 2 | 4 | 13 | 4 | 23 | 8.83 | 74% | 0% | 74% |
| Stevens Van Lines | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 1 | 1 | 0 | 3 | 8.00 | 33% | 0% | 33% |
| United Van Lines | 0 | 0 | 0 | 0 | 1 | 3 | 21 | 30 | 58 | 55 | 168 | 8.82 | 67% | 2% | 65% |
| Victory Worldwide | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 3 | 0 | 3 | 9.00 | 100% | 0% | 100% |
| Wheaton Van Lines | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 1 | 2 | 9.50 | 100% | 0% | 100% |
| Other not listed | 0 | 0 | 0 | 0 | 0 | 0 | 6 | 5 | 3 | 3 | 17 | 8.18 | 35% | 0% | 35% |
| HHG INDUSTRY> | 1 | 0 | 0 | 0 | 8 | 19 | 68 | 110 | 207 | 229 | 642 | 8.82 | 68% | 4% | 64% |

| | |
|---|---|
| AVERAGE SCORE | 8.82 |
| TOP BLOCK | 68% |
| BOTTOM BLOCK | 4% |
| NET SATISFACTION | 64% |

The results indicate the corporate relocation managers are <u>highly satisfied</u> with the overall financial soundness of the industry; average score is 8.82 and net satisfaction is 64%.

Among the 5 best performing firms in the survey with meaningful number of surveys:

| Carrier | Net Satisfaction | Average Score |
|---|---|---|
| NorthAmerican (29 surveys) | 86% | 9.31 |
| Budd (47 evaluations) | 81 | 9.21 |
| Allied (101 surveys) | 69 | 9.01 |
| Atlas (118 surveys) | 67 | 8.97 |
| Clark & Reid (12 surveys) | 67 | 8.92 |
| **INDUSTRY AVERAGE** | **64%** | **8.82** |

Three firms achieved excellence in this survey regarding financial stability and soundness: NorthAmerican, Budd and Allied.

**Question – "If known, what percentage of your moving services providers business is self-haul?**

This is another new question this year. The intent, as requested by a corporate manager, is to determine the percentage of a carrier's traffic is self-haul. Only 60% of the survey participants answered this question and the results are shown below for the large firms with meaningful sample sizes.

| | | Percentage |
|---|---|---|
| Paul Arpin Van Lines | 12 | 80% |
| Allied Worldwide | 43 | 78% |
| Budd Van Lines | 26 | 77% |
| Mayflower | 15 | 76% |
| Graebel Company | 30 | 75% |
| New World Van Lines | 14 | 74% |
| Atlas Van Lines | 67 | 69% |
| United Van Lines | 103 | 67% |
| NorthAmerican | 18 | 59% |

These metrics do not necessarily reflect reality for any carrier, but only the relocation managers' perception of what percentage is self-haul. Moving service providers with fewer opinions are not listed.