2012 SURVEY OF CORPORATE RELOCATION MANAGERS

10th Annual Relocation Managers' Survey © on the Household Goods Shipment Industry

An Independent Survey Performed by Trippel Survey & Research, LLC

Report Highlights

Industry Trends

2012 Ranges of Domestic Relocation Volume

Ecological and Sustainability Business Practices

Carrier Performance

Top Ranked Carrier

#1 in Highest Overall Satisfaction: Budd Van Lines

#1 in Willingness to Recommend: Budd Van Lines

"Highest Top Block in Transferee Satisfaction"

"Excellence in Ability to Meet Transferee's Moving Schedule"

"Excellence in Ability to Recruit & Retain Drivers Year-Round"

"Excellence in Satisfaction with Integrity & Trustworthiness of Suppliers"

"Excellence in Financial & Organizational Stability"

"Excellence in Claims Resolution (Fair, Prompt)"

BUDD VAN LINES

www.buddvanlines.com

TENTH ANNUAL
RELOCATION MANAGERS' SURVEY©
on the HOUSEHOLD GOODS SHIPMENT 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 USA transferee relocation, and (2) gather information on issues pertinent and relevant to managing relocation household goods shipments for domestic moves.

METHODOLOGY

This is the tenth 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 or primary industry. There is no way to identify anonymous responses.

The survey was launched in January 23 and closed February 1, 2012. Of the 1,236 initial invitations sent via email 34 were undeliverable. From the 1,202 delivered survey invitations 410 survey responses were received. This is represents a 34% response rate.

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.

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Trippel Survey & Research, LLC maintains strict confidentiality of corporate participants.

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SURVEY REPORT INDEX

KEY INSIGHTS FROM SURVEY

1. Overall satisfaction for the industry decreased slightly from the prior year; down to 8.35 average on a 10-high scale.
2. Among firms with either contracts with suppliers or have a preferred list of HHG suppliers the average number of suppliers on these preferred lists is 2.35, down from last year.
3. Two-thirds of survey participants expect to move under 250 domestic employees this year.
4. Approximately 49% of corporations hold HHG contracts, down from 2011.
5. Among those holding contracts with HHG suppliers, the typical duration is 3 years although nearly as many companies do not have a termination/duration date.
6. More than one-half of companies expect the intermediary (relocation management company) to use the designated preferred list.
7. Slightly more than one-half of companies do consider ecological, sustainability as part of the decision on awarding business to a carrier.
8. Slightly more than one-half of managers rate “social responsibility” very high in importance in awarding a carrier business.
9. There is NO uniform definition acceptable to corporate relocation managers regarding the term “self-haul.” Further, the percentage of corporate managers who rate this attribute important when awarding business is very low.
10. Very few firms use “alternative” forms of household goods shipments. Those few companies using this form of shipment typically implement this alternative for new hires, former military and college graduates (generally).
11. Relocation management companies are by-far the most prevalent form of intermediary (middle channel member between corporate client and customer). However the percentage of managers giving a top-block score to this intermediary was only 55%.
12. Three-quarters of corporate managers do not use RFPs when selecting a preferred supplier.
13. Three-quarters of corporate managers do not use on-line bid models for awarding business.
14. Over 80% of companies prefer to use more than one carrier for their business.
15. One-third of corporate managers use the services of an independent audit firm, and among those who do use this service, 30% achieve 1-3% savings, another 30% achieve over 3% savings and 10% see no cost benefits.
16. United Van Lines remains the largest supplier represented in this survey with Atlas and Allied the next two largest. Together these three “franchise/agent” organizations represent 53% of the evaluations submitted this year; this is lower than past years.
17. Among the franchise/agent carrier systems northAmerican and Allied are, for most attributes covered in the survey, providing the most satisfying service. Among the “independent” (no franchise, no agents) carriers Budd and Paul Arpin are providing the most satisfying services.

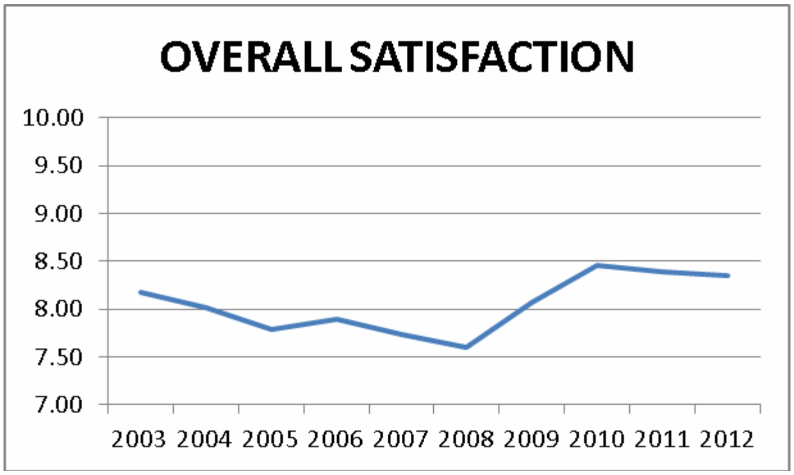
PRESENTATION OF CHARTS AND SURVEY TABLES

Throughout this report charts and tables show all HHG carriers evaluated by five or more corporate clients. Tables generally show the number of corporate relocation managers providing evaluations, the scores provided, the average score, 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	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	2	3	3	0	8	8.13	38%	0%	38%
Allied Worldwide	0	0	0	0	0	0	9	39	29	26	103	8.70	53%	0%	53%

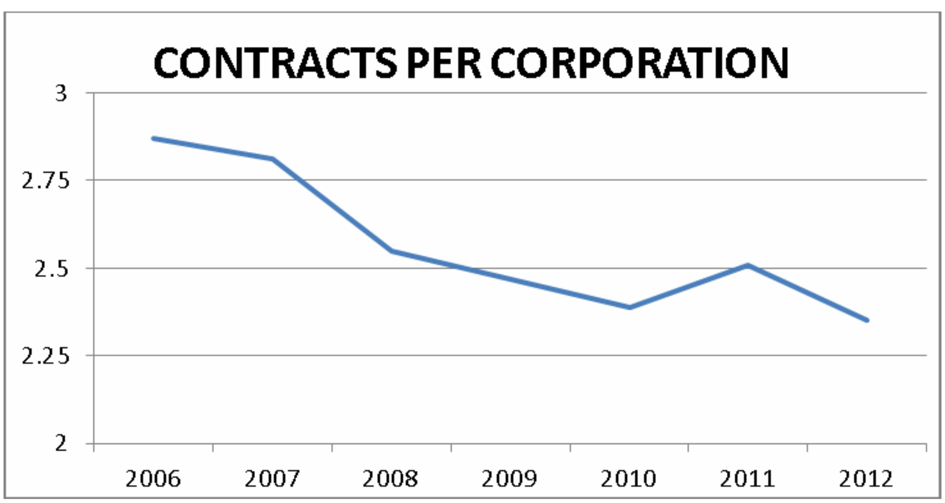
TWO HHG INDUSTRY TRENDS

The following chart shows the HHG industry performance, as measured in the *Relocation Mangers' Survey*©, for the last ten 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 8.35 (10 high scale) in this year's survey. Although this is the fourth consecutive year the industry collectively exceeded the 8.0 satisfaction metric this was the second decrease, albeit slight, in client satisfaction over the same four-year period; down from 8.39 in 2011.

Another important trend is the number of contracts corporations engage with household goods suppliers. Not all firms negotiate and hold contracts of household goods suppliers, but among those that do the average number of contracts is 2.35 per corporation. This represents a decrease from 2011 of 2.51 contracts per corporation. There are a number of explanations for this trend found in the report.



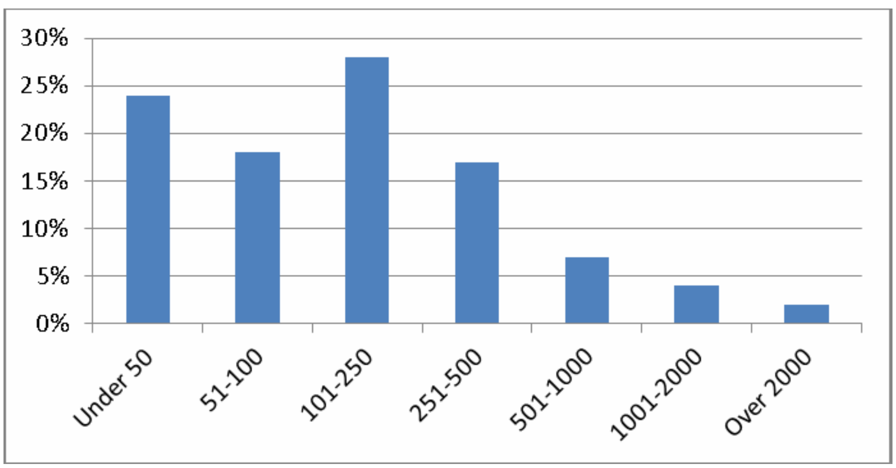
CORPORATE PARTICIPANT PROFILE AND ADMINISTRATION OF HHG

ANTICIPATED DOMESTIC U.S.A. VOLUME IN 2012

This chart shows the anticipated 2012 ranges of domestic (USA) volume and % of companies' expected volume in 2012.

Your anticipated domestic annual move range (all moves, homeowners and renters) for 2012?		
Under 50	98	24%
51-100	74	18%
101-250	115	28%
251-500	70	17%
501-1000	29	7%
1001-2000	16	4%
Over 2000	8	2%
Total	410	100%

The mix of corporate participants is lower this year versus last year due to a large influx of corporations participation with smaller volume added to the initial email distribution. The bar graph below represents the table above.



CORPORATIONS HOLDING SUPPLIER CONTRACTS

Approximately 49% of corporations hold contracts with carriers.

Does your company hold the contracts with the moving services providers?		
Yes	201	49%
No	209	51%
Total	410	100%

The percentage of companies with supplier contracts is lower than last year. Possible reasons for this reduction (from 69% to 49%) could be: (a) the increased number of smaller volume companies in the survey, (b) overall decrease in the average number of contracts per corporation and (c) continued use of intermediaries (relocation management companies, audit/move management suppliers) alleviating the corporation of the burden of contract negotiation.

DURATION OF CONTRACTS WITH HHG SUPPLIERS

Among the 198 corporations executing HHG contracts, more than nearly 40% agree to 3-year contracts. Approximately 29% negotiate open-ended contracts with no fixed duration.

If yes to the above question, what is the approximately duration of the typical contract?		
One year or less	10	5%
Two years	35	18%
Three years	78	39%
Four or more years	18	9%
Open ended, no fixed duration	56	29%
Total	198	100%

USE OF PREFFERED H.H.G. SUPPLIERS

Among the 406 corporations answering the question, mover than one-half do expect moving business to go to the carriers on the corporations “preferred list.”

Regardless whether or not you hold the contracts with any moving services providers, do you require part or all of your business be given to preferred suppliers?		
Yes, we expect all our moves to go to preferred moving suppliers	216	53%
Yes, but our move management firm or relocation company has a degree of flexibility to award a move to non-preferred moving suppliers	81	20%
No, our transferee shipments are awarded by the move management firm or relocation company without obligations to honor specific carrier(s) contracts or preferred suppliers	109	27%
Total	406	100%

IMPORTANCE OF ECOLOGICAL & SUSTAINABILITY BUSINESS PRACTICES

More than one-half of survey participants consider sustainable and ecologically friendly business practices in making purchasing or use decisions.

Do moving services suppliers with sustainable and ecologically friendly business practices impact your purchasing/use decisions?		
Yes	227	56%
No	178	44%
Total	405	100%

IMPORTANCE OF CORPORATE SOCIAL RESPONSIBILITY

Approximately 55% of survey participants believe corporate social responsibility is an important business practice of HHG suppliers.

How important is it to you your moving service suppliers practice good Corporate Social Responsibility?									
No Importance									**Extremely Important**
1	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10**
4	4	0	8	28	28	48	60	72	149
1%	1%	0%	2%	7%	7%	12%	15%	18%	37%

SELF HAUL DEFINED BY PARTICIPANTS

Participants were asked to select a definition of "self-haul."

Many firms use the term "self-haul." Which of the following represents the closest definition of self-haul to you?		
Same driver start to finish	117	29%
Same crew start to finish	72	18%
Same agent responsible from start to finish	133	33%
Same van line from start to finish	84	21%
Total	406	100%

Among the four choices, there was no strong opinion on which definition of self-haul is accurate!

IMPORTANCE OF THE SAME DRIVER HANDLING THE ENTIRE SHIPMENT

Participants evaluated the importance of the driver handling the entire move.

How important do you feel it is for the driver of a move to handle the entire move: pack, load, deliver and unload?									
No importance									**Extremely important**
1	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10**
4	0	0	8	24	28	72	113	80	76
1%	0%	0%	2%	6%	7%	18%	28%	20%	19%

Very few, only 39%, gave "top block" scores of 9 or 10 for the importance of the same driver handling the entire in shipment of household goods.

ALTERNATIVE APPROACHED TO HOUSEHOLD GOODS SHIPMENT

Are corporate relocation managers using or anticipating using alternative forms of shipment of household goods?

CHART NEXT PAGE

Do you anticipate using or are you currently using alternative approaches to HHG shipment in 2012? These alternatives might include container-type products/services such as PODS, ABS 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 2012	266	69%
Yes, we are currently providing this form of shipment as part of our transfer program	46	12%
Yes, we are considering this form of shipment to become an element/alternative in our program	73	19%
Total	385	100%

The percentage of managers using or anticipating using decreased from 41% in 2011 to 31% in this year's survey. This might be attributed to the increase in the number of small volume corporations in the survey (i.e. less inclined to look for alternative means of shipments).

With that said the percentage of firms using alternative forms of shipment dropped from 20% in 2011 to 12% this year. This indicates a significant reduction in companies currently using this form of shipment.

WHICH EMPLOYEE TYPICALLY USES THE ALTERNATIVE APPROACH TO SHIPPING HOUSEHOLD GOODS

Only a couple dozen companies use this approach and voluntarily provided insight into which employees typically use the alternative approach

Which types of employees typically use (or you expect to use) the PODS, ABS or Self-Pack & Load alternatives to full services HHG?
25 Responses

Although the complete list is found in Appendix A, page 26 the pattern indicates new hires, former military and lower level employees typically use this approach to shipment.

USING A MOVE MANAGER OR RELOCATION MANAGEMENT COMPANY

Four choices were provided to answer the question of whether an intermediary is used to administer HHG programs.

Which of the following types of intermediaries, if any, do you use to administer your HHG program? Select the best answer.		
Relocation Management Company	314	80%
A Household Goods company with a "Move Management" division	12	3%
A specialized, independent Move Management or Audit company	16	4%
In-House administration (we order our own moves and pay the invoices)	51	13%
Total	392	100%

The most common intermediary are relocation management companies followed in distant second by companies which administer HHG internally.

SATISFACTION WITH PERFORMANCE OF INTERMEDIARY

Relocation managers rated the performance of the intermediary.

If you use an intermediary, such as a relocation management company or a move management company, to administer your household goods shipment program, how satisfied are you with the performance and value you receive from this intermediary?									
Low satisfaction, low value									**High satisfaction, high value**
4	4	4	8	24	16	47	71	118	98
1%	1%	1%	2%	6%	4%	12%	18%	30%	25%

Only 55% of corporate relocation managers gave a top block score, while 15% gave a bottom block score. This metric indicates overall net satisfaction is 40% - moderately satisfying.

Also, this outcome is slightly higher than last year when the top block percentage was 51%

Among the larger relocation management companies with at least 25 evaluations these are the average scores:

Altair Global Relocation = 9.09
Weichert Relocation Resources = 8.90
Sirva = 8.64
Cartus = 8.54
Brookfield = 8.25

USE OF ON-LINE, BID MODELS FOR SELECTION OF CARRIER

Slightly more than three-quarters of respondents (77%) do not use on-line bid models.

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	90	23%
No	302	77%
Total	392	100%

Last year only 18% used an on-line bid model for awarding carrier business, now 23%.

CHANGE OF CARRIER LISTS THE PAST YEAR

Approximately one-half of participating companies answered this question about changing carriers during the last year.

See chart next page

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 relocation management company or the move manager administers our HHG program	67	32%
We added one or more new moving service providers to our list	17	8%
We removed one or more moving service providers from our list	29	14%
No change; we use the same moving service providers as a year ago	111	53%

Last year 55% did not make a change, this year the rate of no-change decreased slightly to 53%.

USE OF AN "R.F.P" FOR THE AWARDING OF BUSINESS
Among the companies which manage their contracts and made a change during the past year, nearly three-quarters of companies did not use the *Request For Proposal* as a means to award new business.

If you made any change to your preferred list of moving services provider(s) did you go through an RFP process to make the change(s)?		
Yes	25	26%
No	71	74%
Total	96	100%

This is an increase in the number of companies not using an RFP compared to last year.

NUMBER OF SUPPLIERS ON CORPORATIONS "PREFERRED LIST" OF SUPPLIERS
Regardless of whether a corporation has a contract the firm might request the intermediary use specific suppliers in transfers or assignments. This "preferred list" might change from year to year and the number of carriers on the preferred list might change.

How many moving service providers are on your preferred list?		
1 supplier	77	21%
2 suppliers	73	20%
3 suppliers	51	14%
4 suppliers	29	8%
5 or more suppliers	18	5%
No list of preferred suppliers; our intermediary selects firm(s)	113	31%
Total	361	100%

Among company respondents answering the question, one of five companies prefer only 1 supplier handle the HHG business, while nearly one-half use 2 or more preferred suppliers.

The single-supplier figure of 21% is nearly the same as last year's 20% figure, while the number of corporations with no preferred list increased from 28% last year to 31% this year. The latter figure might explain, in part, why there was a reduction in the average number of suppliers per corporation.

USE OF THIRD PARTY ORGANZIATIONS TO AUDIT INVOICES

Respondents provided information on whether they have an independent organization to audit the HHG invoice.

Do you use a third-party organization to audit the HHG invoices?		
Yes	129	32%
No	273	68%
Total	402	100%

Nearly 70% of companies do not use this type service.

The third-party audit firm used most often is Runzheimer, followed in distant second by Parsifal and then Fisher & Sons.

The average score for satisfaction with the audit industry performance was 8.68.

AUDIT PERFORMANCE RECAPTURING EXPENSE

Respondents provided information on whether, in their estimation, the corporation was reducing HHG expense through the independent audit process.

If possible to estimate, what $ dollar per shipment are you recapturing based on the performance of the audit firm?		
1 - 3%	37	31%
3.1 - 6%	17	14%
6.1 - 9	4	3%
9.1 - 12%	9	8%
Over 12%	4	3%
Not sure if we see any financial benefit	33	28%
No financial benefit	17	14%
Total	121	100%

Nearly one-third (31%) believe the estimated savings is under 3% of the shipment costs, and 14% believe there is no savings. Conversely, nearly one-third of the companies using the service believe they are saving in excess of 3% of HHG expense.

MOVING SERVICE SUPPLIER PERFORMANCE

SUPPLIERS' SURVEYS & NUMBER OF EVALUATIONS

The survey results indicate most responding corporate relocation managers allocate their domestic USA household goods business among multiple carriers. Even among the corporations without a preferred list the intermediary firm (relocation management company) likely uses multiple carriers to handle the companies' shipment of household goods. Earlier information indicates there are 2.35 carriers on each corporate list where a "preferred supplier" relationship exists. In this survey 410 corporate managers submitted 799 evaluations – averaging nearly 2 evaluations from each corporate manager.

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

Supplier	Survey Share	Number Evaluations
United Van Lines	23%	183
Atlas Van Lines	17%	136
Allied Worldwide	13%	103
Graebel Company	11%	84
NorthAmerican	7%	52
Budd Van Lines	6%	50
New World Van Lines	4%	33
Paul Arpin Van Lines	3%	26
Mayflower	3%	22
Crown Van Lines	2%	18
Clark & Reid	2%	16
A. Arnold	1%	8
Wheaton Van Lines	1%	8
Bekins Van Lines	1%	7
Stevens Van Lines	1%	5
Victory Worldwide	1%	5
Other not listed	4%	43
	100%	799

The largest share of survey evaluations is United Van Lines – 23% of the corporations in this survey evaluated the services of a United agent (183 evaluations of 799 evaluations submitted). United's survey-share is down 3% points from the last survey.

The three large firms, United, Atlas and Allied, dominated the share of evaluations – 53% of the evaluations were submitted on these 3 firms. This is a significant decrease from 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 evaluations submitted by relocation managers. The charts on the following pages show the firms with 5 or more evaluations submitted in the survey. All other suppliers are within the "Other" category.

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').

Quality consultants and customer satisfaction studies indicate a Net Satisfaction score of 70% or higher and an average score of 9 or higher represent excellence.

OVERALL SATISFACTION

The survey respondents' scores generated the following outcomes regarding overall satisfaction.

What is your level of satisfaction with the overall performance of the moving service providers you currently use? A score of 10 is high, 1 is low.

	Scores >										# of	Average	Top	Bottom	Net
	1	*2*	*3*	*4*	*5*	*6*	*7*	*8*	*9*	*10*	Evaluations	Score	Block %	Block %	Satis. %
A.Arnold							2	2	4		8	8.25	50%	0%	50%
Allied Worldwide				1	3	3	6	28	32	30	103	8.65	60%	7%	53%
Atlas Van Lines				1	2	1	12	46	50	24	136	8.54	54%	3%	51%
Bekins Van Lines			1			1	1	1	1	2	7	7.57	43%	29%	14%
Budd Van Lines							2	16	21	11	50	8.82	64%	0%	64%
Clark & Reid			1		2	1	1	2	6	3	16	7.88	56%	25%	31%
Crown Van Lines					2	4	4	4	3	1	18	7.28	22%	33%	-11%
Graebel Company	1	1	1			11	12	29	22	7	84	7.81	35%	17%	18%
Mayflower		1		1	1	1	2	8	5	3	22	7.73	36%	18%	18%
New World Van Lines				2	1	4	8	10	4	4	33	7.55	24%	21%	3%
NorthAmerican		1	1	1		1	4	11	22	11	52	8.44	63%	8%	56%
Paul Arpin Van Lines					1		3	8	9	5	26	8.50	54%	4%	50%
Stevens Van Lines							1	3		1	5	8.20	20%	0%	20%
United Van Lines		2	2		5	8	14	27	57	68	183	8.69	68%	9%	59%
Victory Worldwide						1		2		2	5	8.40	40%	20%	20%
Wheaton Van Lines		1	1			1		2	2	1	8	6.88	38%	38%	0%
Other not listed		1	1		2	3	7	9	13	7	43	7.93	47%	16%	30%
HHG INDUSTRY>	1	7	8	6	19	40	79	208	251	180	799	8.35	54%	10%	44%
											AVERAGE SCORE	8.35			
											TOP BLOCK	54%			
											BOTTOM BLOCK	10%			
											NET SATISFACTION	44%			

The 6 best performing firms in the survey with meaningful number of surveys:

Carrier	Net Satisfaction	Average Score
Budd (50 evaluations)	64%	8.82
United (183 surveys)	59	8.69
Allied (103 surveys)	53	8.65
Atlas (136 surveys)	51	8.54
northAmerican (52 surveys)	56	8.44
Paul Arpin (26 surveys)	50	8.50
INDUSTRY AVERAGE	**44%**	**8.35**

Among these six firms Allied, Atlas, northAmerican and Paul Arpin improved performance as measured by average score.

No firm achieved "excellence" among those with a meaningful number of evaluations.

Among the 3 largest moving services companies – all are "agent/franchise systems" - the performance metrics are:

Carrier	Net Satisfaction	Average Score
United (183 evaluations)	59	8.69
Allied (103 evaluations)	53	8.65
Atlas (136 evaluations)	51	8.54
INDUSTRY AVERAGE	**44%**	**8.35**

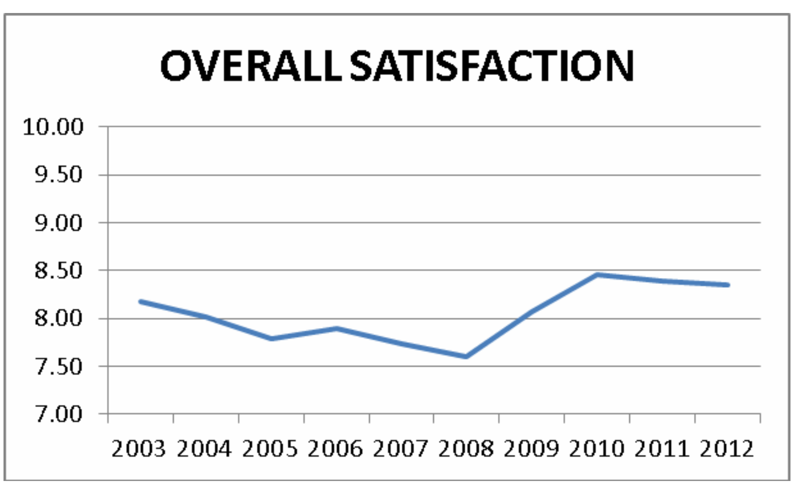
All three agent/franchise systems' carriers are above the industry average and net satisfaction average.

Among "independent" (non-franchise and no agents) the performance metrics for the 3 best performing (with significant evaluations) are:

Carrier	Net Satisfaction	Average Score
Budd (50 evaluations)	64%	8.82
Paul Arpin (26 evaluations)	50	8.50
Clark & Reid (16 evaluations)	31	7.88
INDUSTRY AVERAGE	**44%**	**8.35**

Two of the three independent carriers are above the industry average and net satisfaction average.

The HHG industry earned an average score of 8.35 in this year's survey. Although this is the fourth consecutive year the industry collectively exceeded the 8.0 satisfaction metric this was the second decrease, albeit slight, in client satisfaction over the same four-year period; down from 8.39 in 2011. The industry has recovered significantly from the lows witnessed during the Great Recession era.



WILLINGNESS TO RECOMMEND A SUPPLIER TO AN ASSOCIATE

Most survey respondents evaluated their willingness to recommend carriers to others in the industry.

How willing are you to recommend the moving service providers you currently use to a friend or associate? Select a rating from 10 "very willing" to 1 "very unwilling."

	Scores >										# of	Average	Top	Bottom	Net
	1	*2*	*3*	*4*	*5*	*6*	*7*	*8*	*9*	*10*	Evaluations	Score	Block %	Block %	Satis. %
A.Arnold	0	1	0	0	1	0	1	3	2	0	8	7.00	25%	25%	0%
Allied Worldwide	0	0	0	0	3	2	10	21	32	35	103	8.77	65%	5%	60%
Atlas Van Lines	0	1	0	0	2	1	11	32	47	42	136	8.78	65%	3%	63%
Bekins Van Lines	0	1	0	0	1	0	2	2	1	0	7	6.57	14%	29%	-14%
Budd Van Lines	0	0	0	0	0	0	2	6	18	24	50	9.28	84%	0%	84%
Clark & Reid	0	0	0	0	1	1	2	4	5	3	16	8.25	50%	13%	38%
Crown Van Lines	0	0	0	0	1	1	5	5	4	1	17	7.76	29%	12%	18%
Graebel Company	0	1	1	0	0	4	14	25	22	14	81	8.21	44%	7%	37%
Mayflower	0	1	0	1	0	0	2	5	8	4	21	8.15	56%	10%	46%
New World Van Lines	0	1	0	0	0	2	3	14	8	4	32	8.06	37%	10%	27%
NorthAmerican	0	0	1	0	1	0	12	13	12	12	51	8.31	47%	4%	43%
Paul Arpin Van Lines	0	0	0	0	0	0	2	6	10	7	25	8.88	68%	0%	68%
Stevens Van Lines	0	0	0	0	0	0	1	2	2	0	5	8.20	40%	0%	40%
United Van Lines	0	0	3	0	2	2	26	37	55	54	179	8.63	61%	4%	57%
Victory Worldwide	0	0	0	0	0	0	0	2	3	0	5	8.60	60%	0%	60%
Wheaton Van Lines	1	0	0	0	1	0	3	1	2	0	8	6.63	25%	25%	0%
Other not listed	0	0	0	0	1	0	3	5	17	17	43	9.05	79%	2%	77%
HHG INDUSTRY>	1	6	5	1	14	13	99	183	248	216	786	8.56	59%	5%	54%
											AVERAGE SCORE	8.56			
											TOP BLOCK	59%			
											BOTTOM BLOCK	5%			
											NET SATISFACTION	54%			

Among the suppliers with meaningful number of evaluations there are 5 firms with outcomes higher than the industry averages/net satisfaction metrics:

Carrier	Net Satisfaction	Average Score
Budd (50 evaluations)	84%	9.28
Paul Arpin (25 evaluations)	68	8.88
Atlas (136 evaluations)	63	8.78
Allied (103 evaluations)	60	8.77
United (179 evaluations)	57	8.63
INDUSTRY AVERAGE	**44%**	**8.35**

Only Budd achieved excellence on this attribute.

DELIVERING TRANSFEREE SATISFACTION
Most survey respondents evaluated their perception of which suppliers maximize transferee satisfaction.

How satisfied are you with the moving service providers' ability to deliver maximum transferee satisfaction? Again, 10 is high, 1 is low.

	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	2	3	3	0	8	8.13	38%	0%	38%
Allied Worldwide	0	0	0	0	0	0	9	39	29	26	103	8.70	53%	0%	53%
Atlas Van Lines	0	0	1	0	0	0	14	38	53	29	135	8.68	61%	1%	60%
Bekins Van Lines	0	0	1	0	0	0	2	2	2	0	7	7.29	29%	14%	14%
Budd Van Lines	0	0	0	0	0	0	4	6	21	19	50	9.03	80%	0%	80%
Clark & Reid	0	0	0	0	0	0	1	2	5	7	15	9.20	80%	0%	80%
Crown Van Lines	0	0	0	0	1	1	2	7	5	2	18	8.11	39%	11%	28%
Graebel Company	0	1	0	0	2	1	16	42	11	10	83	8.01	25%	5%	20%
Mayflower	0	0	1	0	0	0	4	6	7	2	20	8.10	45%	5%	40%
New World Van Lines	0	0	1	0	0	0	8	11	9	3	32	8.06	38%	3%	34%
NorthAmerican	0	0	0	0	0	0	4	14	21	13	52	8.83	65%	0%	65%
Paul Arpin Van Lines	0	0	0	0	0	0	2	8	7	9	26	8.88	62%	0%	62%
Stevens Van Lines	0	0	0	0	0	0	0	2	2	0	4	8.50	50%	0%	50%
United Van Lines	0	0	0	1	2	2	16	47	44	65	177	8.81	62%	3%	59%
Victory Worldwide	0	0	0	0	0	0	0	1	3	0	4	8.75	75%	0%	75%
Wheaton Van Lines	1	0	0	0	1	0	2	3	0	0	7	6.29	0%	29%	-29%
Other not listed	0	0	0	0	0	1	0	7	18	14	40	8.99	79%	3%	76%
HHG INDUSTRY>	1	1	4	1	6	5	86	238	240	199	781	8.61	56%	2%	54%
											AVERAGE SCORE	8.61			
											TOP BLOCK	56%			
											BOTTOM BLOCK	2%			
											NET SATISFACTION	54%			

Among the suppliers with meaningful number of evaluations there are 7 firms with outcomes higher than the industry averages/net satisfaction metrics:

Carrier	Net Satisfaction	Average Score
Clark & Reid (15 evaluations)	80%	9.20
Budd (50 evaluations)	80	9.03
Paul Arpin (26 evaluations)	62	8.88
northAmerican (52 evaluations)	65	8.83
United (177 evaluations)	59	8.81
Atlas (135 evaluations)	60	8.68
Allied (103 evaluations)	53	8.70
INDUSTRY AVERAGE	**54%**	**8.61**

Clark & Reid and Budd achieved excellence on this attribute.

ABILITY TO MEET THE TRANSFEREE'S MOVING SCHEDULE
This attribute, as determined in a prior "needs" survey is an extremely high need among transferees, hence the inclusion on this survey.

How satisfied are you with the moving service providers' ability to meet the transferee's moving schedule? Again, 10 is high, 1 is low.

	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	2	3	3	8	9.13	75%	0%	75%
Allied Worldwide	0	0	0	0	0	0	5	25	48	25	103	8.90	71%	0%	71%
Atlas Van Lines	0	0	0	0	0	0	11	24	49	51	135	9.04	74%	0%	74%
Bekins Van Lines	0	0	0	0	0	0	0	6	1	0	7	8.14	14%	0%	14%
Budd Van Lines	0	0	0	0	0	0	0	8	22	19	49	9.22	84%	0%	84%
Clark & Reid	1	0	0	0	0	0	0	7	3	5	16	8.38	50%	6%	44%
Crown Van Lines	0	0	0	0	1	1	4	4	6	1	17	7.94	41%	12%	29%
Graebel Company	0	0	0	0	0	1	8	35	21	17	82	8.55	46%	1%	45%
Mayflower	0	0	0	0	0	0	1	11	8	1	21	8.24	43%	0%	43%
New World Van Lines	0	0	0	0	0	0	4	19	9	0	32	8.16	28%	0%	28%
NorthAmerican	0	0	0	0	0	0	1	7	31	13	52	9.08	85%	0%	85%
Paul Arpin Van Lines	0	0	0	0	0	0	0	3	15	8	26	9.19	88%	0%	88%
Stevens Van Lines	0	0	0	0	0	0	1	3	1	0	5	8.00	20%	0%	20%
United Van Lines	0	0	0	0	1	0	21	42	43	74	181	8.92	65%	1%	64%
Victory Worldwide	0	0	0	0	0	0	0	2	3	0	5	8.60	60%	0%	60%
Wheaton Van Lines	0	0	0	0	0	0	0	3	3	1	7	8.71	57%	0%	57%
Other not listed	0	0	0	0	0	1	0	2	23	17	43	9.28	93%	2%	91%
HHG INDUSTRY>	1	0	0	0	2	3	56	203	289	235	789	8.86	66%	1%	66%
											AVERAGE SCORE	8.86			
											TOP BLOCK	66%			
											BOTTOM BLOCK	1%			
											NET SATISFACTION	66%			

Among the suppliers with meaningful number of evaluations there are 6 firms with outcomes higher than the industry averages/net satisfaction metrics:

Carrier	Net Satisfaction	Average Score
Paul Arpin (26 evaluations)	88%	9.19
Budd (49 evaluations)	84	9.22
northAmerican (52 evaluations)	85	9.08
Atlas (135 evaluations)	74	9.04
Allied (103 evaluations)	71	8.90
United (181 evaluations)	64	8.92
INDUSTRY AVERAGE	**66%**	**8.86**

Paul Arpin, Budd, northAmerican and Atlas achieved excellence on this attribute.

SUPPLIER'S ABILILITY TO RECRUIT AND RETAIN DRIVERS YEAR-ROUND, INCLUDING YOUR BUSY SEASON

This attribute, as determined in a prior "needs" survey is an extremely high need among corporate relocation managers, hence the inclusion on this survey.

How satisfied are you with the moving service providers' ability to recruit and retain drivers year-round, including your busy season?

	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	2	1	2	6	8.67	50%	0%	50%
Allied Worldwide	0	0	0	0	0	0	4	19	31	34	88	9.04	74%	0%	74%
Atlas Van Lines	0	0	0	0	0	0	14	42	38	27	121	8.64	54%	0%	54%
Bekins Van Lines	0	0	0	0	1	0	0	2	1	0	4	7.50	25%	25%	0%
Budd Van Lines	0	0	0	0	0	0	2	6	27	10	45	9.00	82%	0%	82%
Clark & Reid	0	0	0	0	0	0	1	7	3	2	13	8.46	38%	0%	38%
Crown Van Lines	0	0	0	0	2	0	4	6	1	1	14	7.50	14%	14%	0%
Graebel Company	0	0	1	0	1	2	21	35	11	9	80	7.95	25%	5%	20%
Mayflower	0	0	0	0	1	0	9	9	1	0	20	7.45	5%	5%	0%
New World Van Lines	0	0	0	0	1	0	17	9	2	1	30	7.47	10%	3%	7%
NorthAmerican	0	0	0	0	0	0	0	9	24	14	47	9.11	81%	0%	81%
Paul Arpin Van Lines	0	0	0	0	0	0	0	9	7	7	23	8.91	61%	0%	61%
Stevens Van Lines	0	0	0	0	0	0	0	0	2	0	2	9.00	100%	0%	100%
United Van Lines	0	0	1	0	1	0	25	49	49	47	172	8.64	56%	1%	55%
Victory Worldwide	0	0	0	0	0	0	0	1	2	0	3	8.67	67%	0%	67%
Wheaton Van Lines	0	0	0	0	2	0	1	1	1	0	5	6.80	20%	40%	-20%
Other not listed	0	0	0	0	0	1	0	8	11	9	29	8.93	69%	3%	66%
HHG INDUSTRY>	0	0	2	0	9	3	99	214	212	163	702	8.56	53%	2%	51%

AVERAGE SCORE	8.56
TOP BLOCK	53%
BOTTOM BLOCK	2%
NET SATISFACTION	51%

Among the suppliers with meaningful number of evaluations there are 6 firms with outcomes higher than the industry averages/net satisfaction metrics:

Carrier	Net Satisfaction	Average Score
northAmerican (47 evaluations)	81%	9.11
Budd (45 evaluations)	82	9.00
Allied (88 evaluations)	74	9.04
Paul Arpin (23 evaluations)	61	8.91
United (172 evaluations)	55	8.64
Atlas (121 evaluations)	54	8.64
INDUSTRY AVERAGE	**51%**	**8.56**

NorthAmerican, Budd and Allied achieved excellence on this attribute.

SATISFACTION WITH INTEGRITY AND TRUSTWORTHINESS OF SUPPLIERS

This attribute, as determined in a prior “needs” survey is an extremely high need among corporate relocation managers, hence the inclusion on this survey.

How satisfied are you the integrity and trustworthiness of your moving service providers?

	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	0	4	3	7	8.79	93%	0%	93%
Allied Worldwide	0	0	0	0	0	0	0	22	23	55	100	9.33	78%	0%	78%
Atlas Van Lines	0	0	0	0	0	0	3	24	40	61	128	9.24	79%	0%	79%
Bekins Van Lines	0	0	0	0	0	0	0	1	4	1	6	9.00	83%	0%	83%
Budd Van Lines	0	0	0	0	0	0	0	6	23	19	48	9.27	88%	0%	88%
Clark & Reid	0	0	0	0	1	0	0	3	3	7	14	9.00	71%	7%	64%
Crown Van Lines	0	0	0	0	1	0	1	8	6	1	17	8.24	41%	6%	35%
Graebel Company	0	0	0	0	0	2	4	25	31	19	81	8.75	62%	2%	59%
Mayflower	0	0	1	0	0	0	4	11	5	0	21	7.81	24%	5%	19%
New World Van Lines	0	0	0	0	0	0	11	7	7	6	31	8.26	42%	0%	42%
NorthAmerican	0	0	0	0	0	0	7	4	14	21	46	8.98	76%	0%	76%
Paul Arpin Van Lines	0	0	0	0	0	0	0	5	6	14	25	9.36	80%	0%	80%
Stevens Van Lines	0	0	0	0	0	0	0	0	3	0	3	9.00	100%	0%	100%
United Van Lines	0	0	1	1	0	0	24	25	56	71	178	8.93	71%	1%	70%
Victory Worldwide	0	0	0	0	0	0	0	0	4	0	4	7.88	88%	0%	88%
Wheaton Van Lines	0	0	0	0	1	0	0	3	3	0	7	8.00	43%	14%	29%
Other not listed	0	0	0	0	0	0	2	7	9	20	38	9.24	76%	0%	76%
HHG INDUSTRY>	0	0	2	1	3	2	56	151	240	298	754	8.98	71%	1%	70%
											AVERAGE SCORE	8.98			
											TOP BLOCK	71%			
											BOTTOM BLOCK	1%			
											NET SATISFACTION	70%			

Among the suppliers with meaningful number of evaluations there are 5 firms with outcomes higher than the industry averages/net satisfaction metrics:

Carrier	Net Satisfaction	Average Score
Paul Arpin (25 evaluations)	80	9.36
Allied (100 evaluations)	78	9.33
Budd (48 evaluations)	88	9.27
Atlas (128 evaluations)	79	9.24
northAmerican (46 evaluations)	76	8.98
INDUSTRY AVERAGE	**70%**	**8.98**

All five suppliers achieved excellence on this attribute.

SATISFACTION WITH FINANCIAL AND ORGANIZATIONAL STABILITY OF SUPPLIERS

This attribute, as determined in a prior "needs" survey is an extremely high need among corporate relocation managers, hence the inclusion on this survey.

How satisfied are you with financial and organizational stability of your moving services providers?

	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	0	0	0	1	2	2	5	9.20	80%	0%	80%
Allied Worldwide	0	0	0	0	0	0	3	9	41	46	99	9.31	88%	0%	88%
Atlas Van Lines	0	0	0	0	0	2	13	18	33	57	123	9.06	73%	2%	72%
Bekins Van Lines	0	0	0	0	0	0	1	0	2	0	3	8.33	67%	0%	67%
Budd Van Lines	0	0	0	0	0	0	0	5	14	25	44	9.45	89%	0%	89%
Clark & Reid	0	0	0	0	0	0	0	0	4	8	12	9.29	100%	0%	100%
Crown Van Lines	0	0	0	0	1	0	2	6	7	0	16	8.13	44%	6%	38%
Graebel Company	0	0	1	0	0	1	19	29	16	9	75	8.11	33%	3%	31%
Mayflower	0	0	0	0	0	0	4	5	8	0	17	8.03	47%	0%	47%
New World Van Lines	0	0	0	0	0	0	0	5	8	15	28	9.36	82%	0%	82%
NorthAmerican	0	0	0	0	0	0	1	4	16	27	48	9.35	90%	0%	90%
Paul Arpin Van Lines	0	0	0	0	0	0	0	0	6	17	23	9.74	100%	0%	100%
Stevens Van Lines	0	0	0	0	0	0	0	0	0	4	4	8.75	100%	0%	100%
United Van Lines	0	0	0	0	0	0	14	40	47	73	174	9.03	69%	0%	69%
Victory Worldwide	0	0	0	0	0	0	0	0	4	0	4	7.88	100%	0%	100%
Wheaton Van Lines	0	0	0	0	0	0	1	0	4	0	5	7.70	80%	0%	80%
Other not listed	0	0	0	0	0	0	0	7	11	18	36	9.04	78%	0%	78%
HHG INDUSTRY>	0	0	1	0	1	3	58	129	221	300	716	9.00	73%	1%	72%
											AVERAGE SCORE	9.00			
											TOP BLOCK	73%			
											BOTTOM BLOCK	1%			
											NET SATISFACTION	72%			

Among the suppliers with meaningful number of evaluations there are 7 firms with outcomes higher than the industry averages/net satisfaction metrics:

Carrier	Net Satisfaction	Average Score
Paul Arpin (23 evaluations)	100%	9.74
Clark & Reid (12 evaluations)	100	9.25
Budd (44 evaluations)	89	9.45
northAmerican (46 evaluations)	90	9.35
Allied (99 evaluations)	88	9.31
New World Van Lines (28 eval.)	82	9.36
Atlas (123 evaluations)	72	9.06
INDUSTRY AVERAGE	**72%**	**9.00**

All seven suppliers achieved excellence on this attribute.

SATISFACTION WITH CLAIMS RESOLUTION (FAIR, PROMPT) OF SUPPLIERS

This attribute, as determined in a prior "needs" survey is an extremely high need among transferees, hence the inclusion on this survey.

How satisfied are you with claims resolution (fair and prompt) of your moving services providers?

	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	1	3	2	7	8.86	71%	0%	71%
Allied Worldwide	0	0	0	0	0	1	7	15	39	31	93	8.99	75%	1%	74%
Atlas Van Lines	0	0	0	0	0	1	5	35	45	39	125	8.93	67%	1%	66%
Bekins Van Lines	1	0	0	0	0	0	0	3	2	0	6	7.17	33%	17%	17%
Budd Van Lines	0	0	0	0	0	0	1	6	14	21	42	9.31	83%	0%	83%
Clark & Reid	0	0	0	0	0	1	0	5	3	4	13	8.69	54%	8%	46%
Crown Van Lines	0	0	0	0	2	0	3	4	4	0	13	7.62	31%	15%	15%
Graebel Company	0	0	0	0	2	1	19	33	14	6	75	7.99	27%	4%	23%
Mayflower	0	0	0	1	1	0	6	5	3	0	16	7.38	19%	13%	6%
New World Van Lines	0	0	0	0	0	0	4	8	10	5	27	8.59	56%	0%	56%
NorthAmerican	0	0	0	0	0	0	0	11	18	14	42	9.08	75%	0%	75%
Paul Arpin Van Lines	0	0	0	0	0	0	0	0	14	7	21	9.33	100%	0%	100%
Stevens Van Lines	0	0	0	0	0	0	0	2	2	0	4	8.50	50%	0%	50%
United Van Lines	0	0	0	0	0	1	15	31	57	54	158	8.94	70%	1%	70%
Victory Worldwide	0	0	0	0	0	0	2	2	0	0	4	7.50	0%	0%	0%
Wheaton Van Lines	0	1	0	0	1	0	1	3	1	0	7	6.71	14%	29%	-14%
Other not listed	0	0	0	0	0	1	3	5	9	22	40	9.20	78%	3%	75%
HHG INDUSTRY>	1	1	0	1	6	6	67	169	238	205	693	8.77	64%	2%	62%
											AVERAGE SCORE	8.77			
											TOP BLOCK	64%			
											BOTTOM BLOCK	2%			
											NET SATISFACTION	62%			

Among the suppliers with meaningful number of evaluations there are 6 firms with outcomes higher than the industry averages/net satisfaction metrics:

Carrier	Net Satisfaction	Average Score
Paul Arpin (21 evaluations)	100%	9.33
Budd (42 evaluations)	83	9.31
northAmerican (42 evaluations)	75	9.08
Allied (93 evaluations)	74	8.99
United (158 eval.)	70	8.94
Atlas (125 evaluations)	66	8.93
INDUSTRY AVERAGE	**62%**	**8.77**

Paul Arpin, Budd, northAmerican and Allied achieved excellence on this attribute.

SATISFACTION WITH VALUE (service received for price paid) PROVIDED BY SUPPLIERS

This attribute, as determined in a prior "needs" survey is an extremely high need among corporate relocation managers, hence the inclusion on this survey.

How satisfied are you with value (services received for price paid) provided by your moving services providers?

	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	1	2	4	8	8.50	69%	0%	69%
Allied Worldwide	0	0	0	0	0	0	5	32	31	28	96	8.85	61%	0%	61%
Atlas Van Lines	0	0	0	0	1	0	10	36	45	33	125	8.78	62%	1%	62%
Bekins Van Lines	0	0	0	0	0	0	1	3	0	0	4	7.75	0%	0%	0%
Budd Van Lines	0	0	0	0	0	1	2	8	19	12	42	8.93	74%	2%	71%
Clark & Reid	0	0	0	0	0	0	0	4	5	4	12	9.00	71%	0%	71%
Crown Van Lines	0	0	0	0	0	1	3	6	4	0	14	7.93	29%	7%	21%
Graebel Company	0	0	0	0	0	1	12	23	22	19	77	8.60	53%	1%	52%
Mayflower	0	0	0	0	1	0	2	7	8	2	20	8.35	50%	5%	45%
New World Van Lines	0	0	0	0	0	1	9	12	4	3	29	7.97	24%	3%	21%
NorthAmerican	0	0	0	0	0	1	3	11	11	18	43	8.85	65%	2%	63%
Paul Arpin Van Lines	0	0	0	0	0	0	0	2	7	11	20	9.20	88%	0%	88%
Stevens Van Lines	0	0	0	0	0	0	0	0	0	4	4	8.75	88%	0%	88%
United Van Lines	1	1	0	0	0	0	18	49	53	52	174	8.72	60%	1%	59%
Victory Worldwide	0	0	0	0	0	0	0	0	4	0	4	7.88	88%	0%	88%
Wheaton Van Lines	0	0	0	0	1	0	0	4	0	0	5	6.60	0%	20%	-20%
Other not listed	0	0	0	0	0	0	0	4	18	18	39	9.24	90%	0%	90%
HHG INDUSTRY>	1	1	0	0	3	5	66	200	232	205	716	8.72	61%	1%	60%
											AVERAGE SCORE	8.72			
											TOP BLOCK	61%			
											BOTTOM BLOCK	1%			
											NET SATISFACTION	60%			

Among the suppliers with meaningful number of evaluations there are 7 firms with outcomes higher than the industry averages/net satisfaction metrics:

Carrier	Net Satisfaction	Average Score
Paul Arpin (20 evaluations)	88%	9.20
Clark & Reid (12 evaluations)	71	9.00
Budd (42 evaluations)	71	8.93
northAmerican (43 evaluations)	63	8.85
Allied (96 evaluations)	61	8.85
Atlas (125 evaluations)	62	8.78
United (174 evaluations)	59	8.72
INDUSTRY AVERAGE	**60%**	**8.72**

Paul Arpin and Clark & Reid achieved excellence on this attribute.

SUPPLIER WITH THE REPUTATION FOR OVERALL QUALITY OF SERVICE

This questions requests relocation managers to give a perception of quality; this may or may not reflect actual evaluations provided by managers.

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.

Supplier	"votes"	% Total
A.Arnold	7	0.9%
Allied	69	9.2%
Atlas	151	20.1%
Bekins	0	0.0%
Budd	83	11.1%
Clark & Reid	46	6.1%
Crown	8	1.1%
Graebel	44	5.9%
Mayflower	0	0.0%
NorthAmerican	9	1.2%
New World	45	6.0%
Paul Arpin	23	3.1%
Stevens Van Line	1	0.1%
United	219	29.2%
Victory	0	0.0%
Wheaton	0	0.0%
OTHER	46	6.1%
Total	751	100%

Among the agent/franchise systems carriers, United and Atlas have the highest percentage of managers believing they have the best reputation for quality. These same two firms also reflect the highest percentages among all carriers regardless of structure.

Among the independents carriers Budd stands out among relocation managers for having the best reputation for quality; and was third highest in manager "voting."

SUPPLIER WITH MOBILE APPLICATIONS

Many organizations in many industries are investing in mobile (smart phone, tablet) applications to enhance the customer's experience with the service provider. This is the first question of this sort in *Trippel Research & Survey* surveys.

Do your moving service suppliers provide a mobile application tool to track shipments?

Supplier	Percentage "Yes"
A.Arnold	75%
Allied or Allied agent	36%
Atlas or Atlas agent	69%
Bekins or Bekins agent	28%

Budd	34%
Clark & Reid	0%
Crown Relocations	50%
Graebel	64%
Mayflower or Mayflower agent	50%
NorthAmerican or agent	33%
New World	17%
Paul Arpin	0%
Stevens Van Line	0%
United or United agent	67%
Victory	0%
Wheaton	50%
Other not listed	14%

The answers are not infallible since you expect a supplier either has a mobile application or they do not – either 100% yes or no. The failure of a relocation manager to answer No rather than Yes might be a reflection of supplier promotion and communicating the availability of the mobile application rather than the absence of a mobile application in the market.

With that caveat, it does appear highly likely a few firms do provide this feature: A.Arnold, Atlas, Graebel and United. Check with your supplier to validate the availability.

CARRIERS WITH KNOWN ABILITY TO MOVE GOODS INTO NORTH AMERICAN MARKETS

A corporate manager asked for the inclusion of this question.

If you have traffic, who are your most effective carriers in these traffic lanes: Canada, Mexico, Alaska and Hawaii?

By a large margin two carriers were named repeatedly: Suddath and United.

APPENDIX A – EMPLOYEES TYPICALLY SHIPPING HOUSEHOLD GOODS VIA AN ALTERNATIVE APPROACH

Respondent #	Response
1	non-exempt, managers and below, family size up to 3
2	College students with small shipments.
3	Renter's
4	Renters, new hire grads
5	limited assistance, lump sum relocations. Typically Senior manager or below positions
6	Relocating employees choose method of move for themselves.
7	We do not have a specific type but we have had requests for PODS and have tried to accommodate those requests.
8	New Hire college graduates
9	Haven't seen enough of a trend to know yet.
10	University recruits- leadership development rotations
11	Employees that receive our Tier 3 and 4 packages. These packages contain the HHG move option.
12	Lump sum and lower tier programs
13	Manager and Director level. Our VP and above would not.
14	small loads for short-term assignments
15	Smaller shipments, ee's single with no family
16	Lower Level - staff accountants, assistant managers, managers in training
17	Lower tiers, new college grads, small relo budgets
18	New Hire Employees without full benefits
19	Depending on their career level and position
20	Management trainees
21	Those in our lower level tiers.

22 Our findings have shown that most employees choose to have their moves done from start to finish using a crew and other services vs self move options. The two types of employees who are more likely to utilize these options are our College and Co-op hires since they are given a lump sum as a miscellaneous expense allowance.

23 Lower Grade Level employees who receive a lump sum; interns

24 New hire, entry level professional, non -exempt

25 Newly hired employees, Students with little to no hhg's

26 Lower level exempt associates and high potential non-exempt associates eligible for relocation.

27 Moves for lower level positions, recent college grads.

28 Former Military.

29 New hire college

30 lump sum - or retail manager level