

# 2009 NATIONWIDE RELOCATING EMPLOYEE SURVEY

*An Independent Survey Performed By Trippel Survey & Research*

## HIGHEST NET SATISFACTION WITH TRANSFEREES



- **“Budd Van Lines earned the highest net satisfaction percentage.”**
- **“Budd’s net satisfaction score reflects the comparatively high top-block percentage and low bottom block percentage earned in the survey.”**
- **Budd Van Lines earned progressively higher transferee scores each of the last four years.**



**CORPORATE AMERICA’S BEST MOVE**

**[WWW.BUDDVANLINES.COM](http://WWW.BUDDVANLINES.COM)**

**Fifteenth Annual  
Nationwide Relocating Employee Survey®  
Results for 2009**

*Budd Van Lines*

***Prepared for:***  
**Mr. Gary M. Grund**  
**July 2009**

## **BACKGROUND INFORMATION**

The fifteenth annual *Nationwide Relocating Employee Survey*® was conducted throughout a six month period ending June 30, 2009. The overall purpose of this annual survey is to collect and report objective, unbiased evaluations from domestic transferees regarding their level of satisfaction with external relocation service providers used in the transfer.

Surveying for the *Nationwide Relocating Employee Survey*® spans a 6 month period and seeks opinions of relocated employees via telephone or via the Internet using web-surveys. The data is collected from (a) relocated employees working for corporate clients of Trippel Survey & Research, LLC as part of the ongoing survey relationships, and (b) from one-time corporate client studies performed for the purpose of this annual industry research.

One standard question is asked of each customer regarding satisfaction with each of the suppliers used in the individual's transfer. The core question is "*Evaluate your overall level of service satisfaction with [this supplier's] performance?*" A ten-point scale is used where 10 is the highest score of satisfaction, 1 is the lowest score. Voluntary statements are recorded/saved and often used in analysis.

Supplier overall performance is evaluated using two metrics: average score and net satisfaction. Average satisfaction is a strict mean score not weighted by volume. Net satisfaction is a measurement commonly used in qualitative surveys measuring the difference between top block scores of 10 or 9 and bottom block scores of 1 through 6. See page 4 for definitions.

Many corporations, as part of an ongoing survey relationship with Trippel Survey & Research LLC, request additional questions of their employees. The responses to those company-specific questions are confidential to those companies and not included in this report.

The survey ended June 30, 2009. The survey collected opinions from 6374 transferees representing 87 companies. There is a small margin of sampling error in all service categories, but does not materially impact the relative ranking of the firms reported.

## **INFORMATION PROVIDED**

The information provided is confidential and is the property of Trippel Survey & Research, LLC. It is being leased to you for your use only. You may **not** share the information with other corporations, suppliers or with any party or individual not an employee of your company without expressed written approval in the form of a marketing license from Trippel Survey & Research, LLC.

Customers of this survey are encouraged to contact Trippel Survey & Research, LLC (501-922-4000, or via email [alantrippel@att.net](mailto:alantrippel@att.net)) to understand the survey methodology, the results and the purchase of a license to market and distribute the survey results.

All material contained herein is copyright © 2009 by Trippel Survey & Research, LLC. All Rights Reserved.

## TABLE OF CONTENTS

<u>TOPIC</u>	<u>PAGE</u>
Definitions	4
Summary of performance among, all service categories for 2008	5
Change in service performance, all service categories, recent 4 years	6
Performance of service firms, by category:	
Household Goods (HHG)	8
Relocation Management Company (RMC)	11
Relocation Mortgage	14
Spouse-Partner-Family	16
Temporary Housing	18

## **DEFINITIONS**

**Average Score** – the arithmetic mean in a range where 10 is a high evaluation to 1 low evaluation. Average scores of 9 or higher indicate outstanding, excellent service while average scores from 8 to under 9 are represent very good service and averages under 8 are varying degrees of mediocre or dissatisfying service.

**Top Block** – scores of either 10 or 9. Top block is usually expressed as a percentage. For example, a top block score of 72% indicates 72% of those surveyed gave a score of either 10 or 9. Top block is considered to be customers who are “proponents” of service, the so-called “raving fans.” These customers are likely to voluntarily use the service in the future and are likely to recommend the service to other business associates. The higher the top block score the better.

**Bottom Block** – the scores which are in the range of 1 through 6. Bottom block is usually expressed as a percentage. For example, a bottom block score of 19% indicate 19% of those surveyed gave a score of either 1 through 6. Bottom block is considered to be customers who are “detractors” of service. Detractors of service spread negative promotion and bad-mouth the service. The lower the bottom block score the fewer number of dissatisfied customers.

**Net Satisfaction** – is the difference between the top block and bottom block, and is expressed as a percentage. For example if top block is 72% and bottom block is 19% then net satisfaction is 53%. The larger the net satisfaction percentage the higher the level of overall customer satisfaction.

Net satisfaction could, in theory, reach +100% indicating every customer scored the service either a 10 or a 9. Conversely, net satisfaction could be -100% indicating every customer gave a bottom block score of 1 through 6.

Net satisfaction of 70% or higher are indications of outstanding, excellent service. This high level of customer satisfaction might occur, as an example when seven people in a sample of ten give a score of 9 or 10, three people give scores of 7 or 8 and there are no recorded evaluations of 1 through 6.

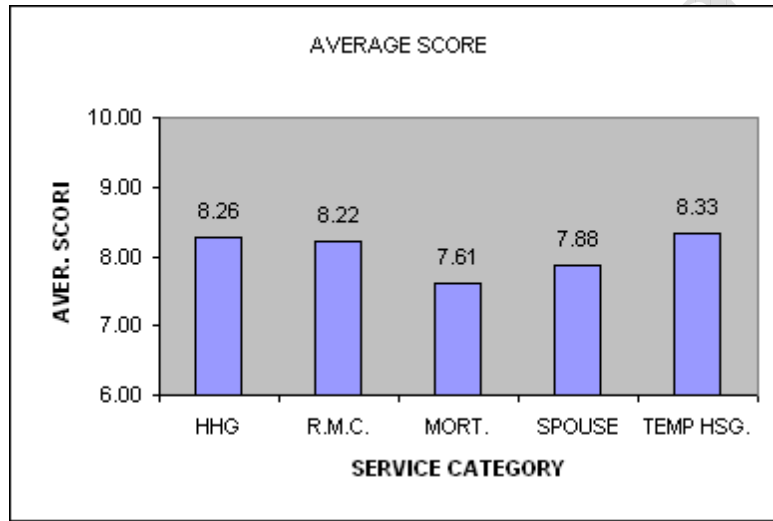
Scores between 40% and 70% are firms with passively satisfied customers. In practice this might indicate for every six or seven proponents of service scores of 9 or 10 , in a sample size of ten, there are one or two detractors of service giving a score of 6 or lower.

Net satisfaction scores of below 40% indicate firms with high levels of customer dissatisfaction. In practice this could indicate for every three or four proponents of services giving scores of 10 or 9 in a sample of ten people there might be one or two detractors giving scores anywhere from 1 through 6. Net satisfaction scores might be negative and indicate the service firm is creating more detractors (scores of 1 through 6) than promoters (scores of 10 or 9) of service.

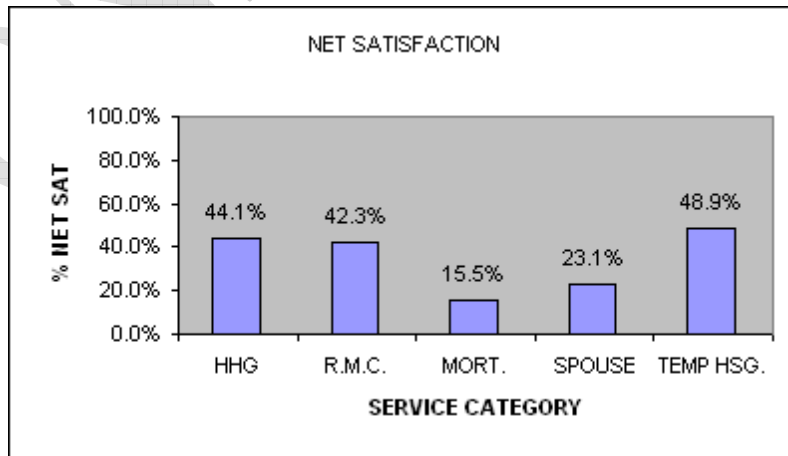
**SUMMARY OF SURVEY RESULTS –  
ALL RELOCATION RELATED INDUSTRIES**

<u>Service Category</u>	<u>Net Satisfaction</u>	<u>Average Customer Satisfaction Score</u>	<u>Total Respondents</u>
Household Goods Shipment	44.1%	8.26 (10 hi)	5,804
Relocation Management Company	42.3%	8.22	5,169
Relocation Mortgage	15.5%	7.61	4,513
Spouse - Family Services	23.1%	7.88	996
Temporary Housing Services	48.9%	8.33	3,404

AVERAGE SCORE:



NET SATISFACTION:

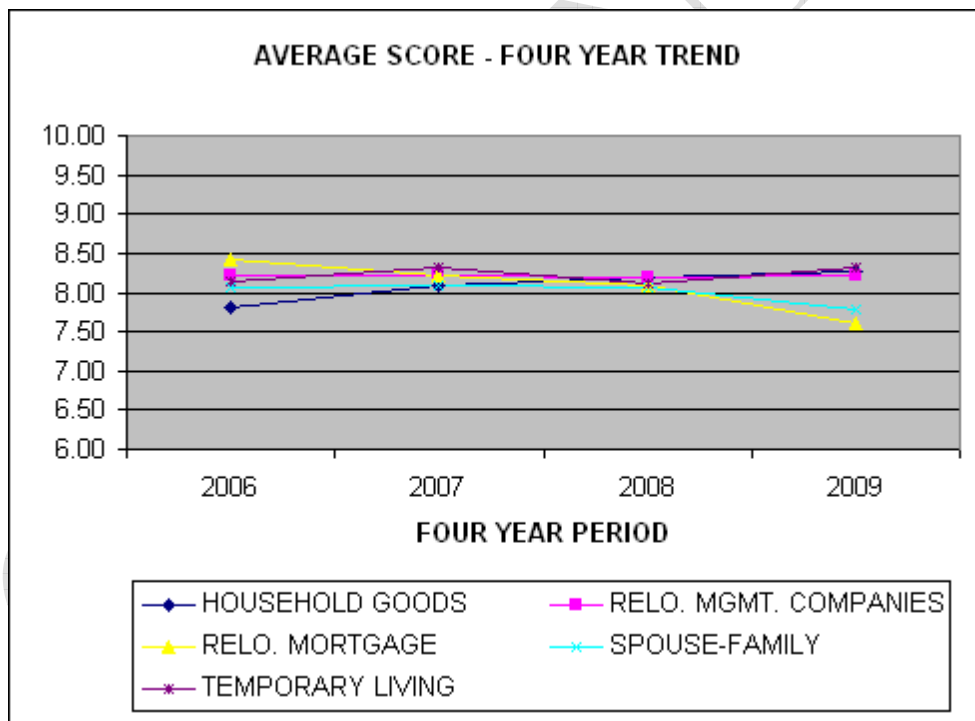


Transferred employees express passive satisfaction in the *very good* range in 3 of 5 service industries: Household Goods, Relocation Management Companies and Temporary Housing Services. No service industry is distinguished for *excellent* service.

The relocation mortgage industry was evaluated at the lowest average score and net satisfaction percentage in the 15 years of this annual survey in the *dissatisfied* range. Spouse-family services industry also earned net satisfaction marks in the *dissatisfied* range.

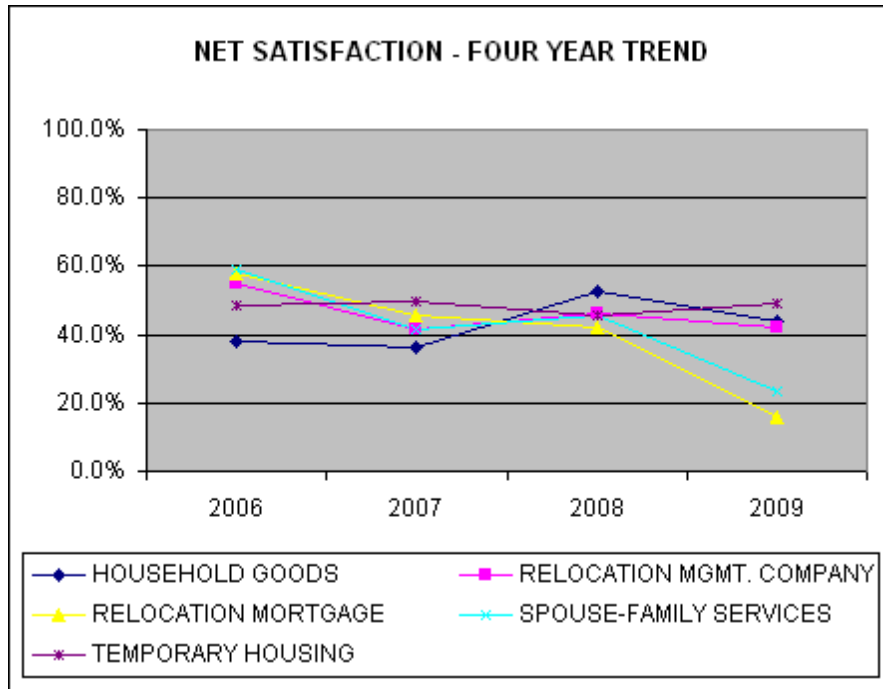
### **CHANGES IN CUSTOMER SATISFACTION OVER RECENT YEARS**

The average scores during the most recent four year period in three of the five relocation service industries show moderate change in customer satisfaction. In two industries however, Relocation Mortgage and Spouse-Family Services, the declining trend in customer satisfaction is more pronounced.



Relocation Management Companies, Temporary Living and Household Goods service firms show a small improvement in transferee satisfaction from last year.

Net satisfaction metrics show similar outcomes: passive satisfaction over the last four years with current year dissatisfaction increasing in many industries. See chart on the next page.



Achieving a 70% net satisfaction score would reflect excellence. No industry achieved that level this past year. The Mortgage industry and the Spouse-Family services industry realize sizeable decreases in net satisfaction reflecting growing number/percentages of “bottom block” scores (in the 1 through 6 ranges on the 10-point scale) with little improvement in “top block” scores of 9 or 10. The only industry realizing an increase in net satisfaction the past year is the temporary housing industry.

Commentary: Many firms in these five industries implemented significant changes this past year: office closings, office size reductions via layoffs, restructuring operating teams and personnel, and changes to how and where transferees are serviced. Many of these internal strategies were the consequence of the financial stresses our national real estate, financial and credit markets are facing. These external forces impact suppliers in all industries and transferring employees, creating opportunities for a few service firms and threats to many more firms. A few firms, as evidenced by the survey outcomes on the survey pages which follow weathered the external and internal stresses well and others poorly.

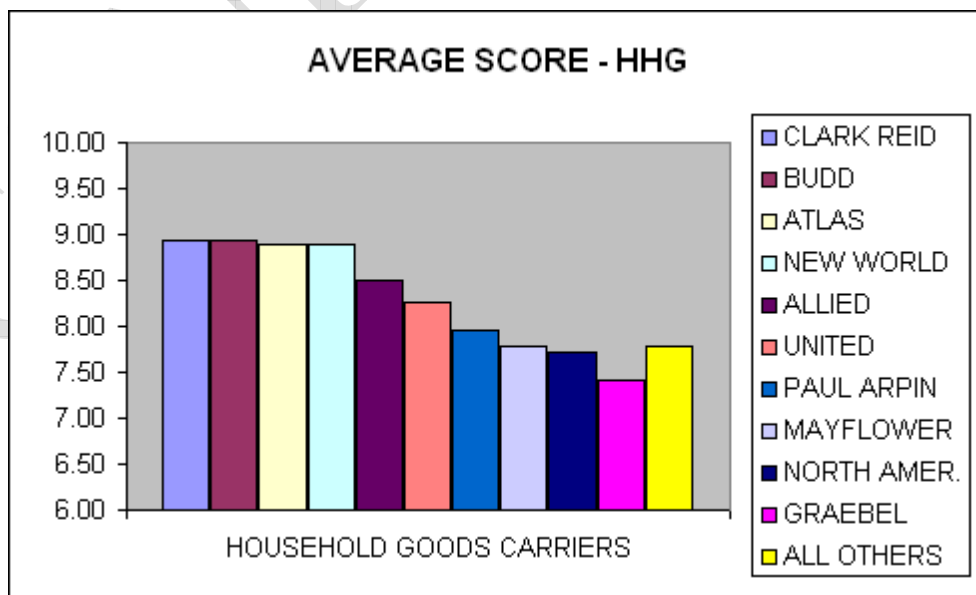


## 1. HOUSEHOLD GOODS SHIPMENT

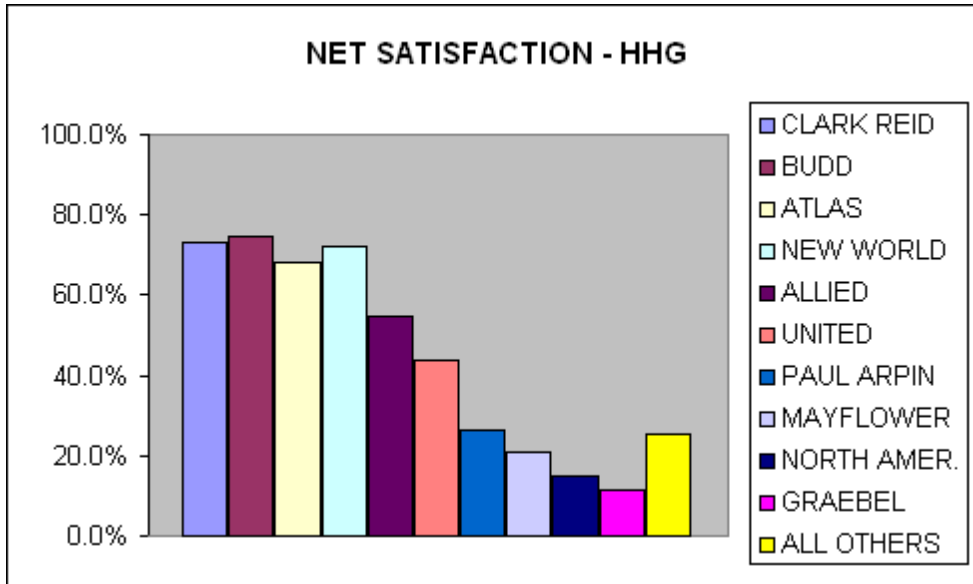
HHG firms included in the chart below are among the 10 largest firms in the service industry. Each of these firms recorded over 125 transferee surveys. Many transferees' evaluations serviced by smaller firms are included in the chart in the *all others* category due to small sample sizes. Survey respondents include any transferred employee serviced by the company regardless of size of load or whether the activity was pack & load, delivery, or both ends of the move; both homeowners and renters. Suppliers are shown in descending order by average score.

Supplier	Total Evaluations	Average Score	Top Block	Bottom Block	Net Satisfaction
Clark & Reid	146	8.94	77.4%	4.1%	73.3%
<b>Budd</b>	<b>461</b>	<b>8.92</b>	<b>77.7%</b>	<b>3.0%</b>	<b>74.6%</b>
Atlas	543	8.90	72.9%	4.6%	68.3%
New World	430	8.88	76.0%	4.0%	72.1%
Allied	527	8.50	63.6%	8.9%	54.6%
United	1462	8.26	54.6%	10.8%	43.8%
Paul Arpin	185	7.96	37.3%	10.8%	26.5%
Mayflower	237	7.78	35.4%	14.3%	21.1%
NorthAmerican	235	7.72	23.0%	8.1%	14.9%
Graebel	241	7.41	30.7%	19.5%	11.2%
All others	1337	7.78	41.8%	16.5%	25.4%
<b>TOTAL</b>	<b>5804</b>	<b>8.26</b>	<b>54.6%</b>	<b>10.5%</b>	<b>44.1%</b>

The average score of the four top firms, Clark & Reid, Budd, Atlas and New World are very close while the net satisfaction indicate degrees of differentiation among all firms.



CONFIDENTIAL



Clark & Reid earned the highest average score while Budd Van Lines earned the highest net satisfaction percentage. Budd's net satisfaction score reflects the comparatively high top-block percentage and low bottom block percentage earned in the survey.

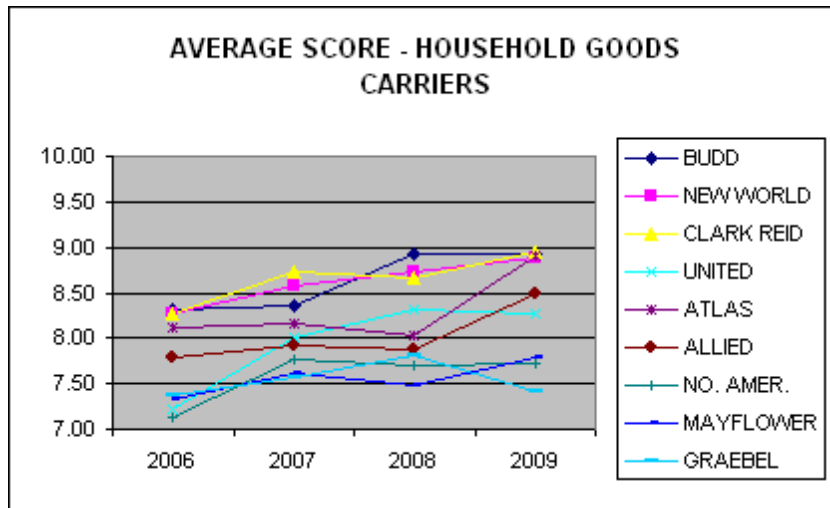
Three firms achieved the "excellence" metric of 70% or greater net satisfaction: Clark & Reid, Budd Van Lines and New World Van Lines.

Many firms achieved above industry average measured by average score and net satisfaction: Clark & Reid, Budd, Atlas, New World and Allied.

Over the last four years there are subtle changes in many carriers' performance in transferee satisfaction.

YEAR	BUDD	NWVL	C+R	UNITED	ATLAS	ALLIED	NO. AMER.	MAYFLW	GRAEBEL
2006	8.31	8.28	8.26	7.21	8.12	7.79	7.13	7.33	7.37
2007	8.35	8.57	8.74	8.00	8.16	7.92	7.77	7.62	7.58
2008	8.92	8.72	8.67	8.32	8.03	7.87	7.70	7.48	7.81
2009	8.92	8.88	8.94	8.26	8.90	8.50	7.72	7.78	7.41

See chart on next page.



Budd Van Lines and New World Van Lines earned progressively higher transferee scores each of the four years. This past year Atlas and Allied showed the largest improvement in average customer satisfaction score.

Most carriers improved this year compared to last; exceptions are United and Graebel which earned lower scores this past year compared to the prior survey.

Over four years there is a very clear trend towards overall improvement in customer satisfaction. The industry performance has improved from the 7.8 range to nearly 8.3 industry-wide average range.

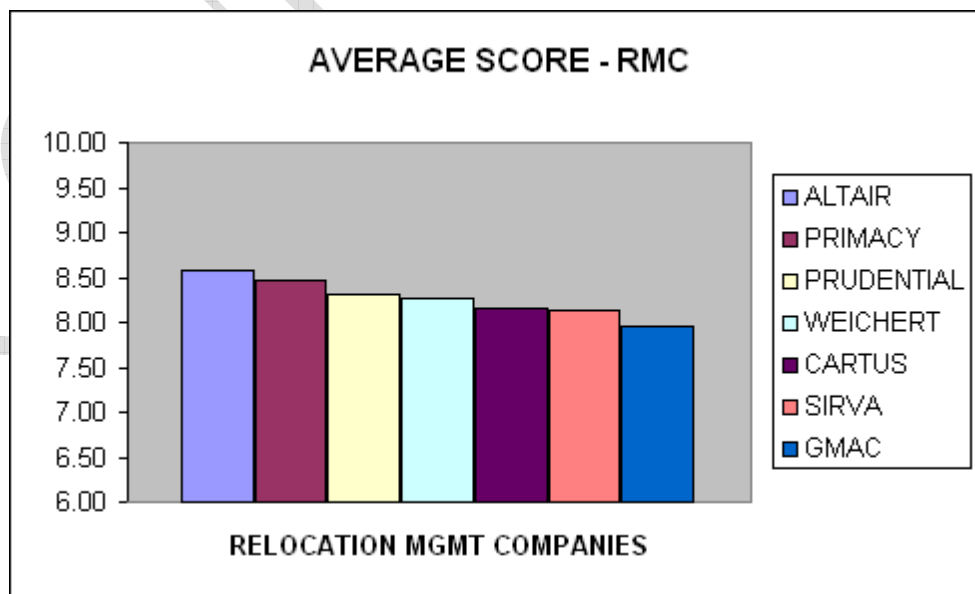
## 2. RELOCATION MANAGEMENT COMPANIES

Relocation Management Companies (RMC) firms included in the top-half of the chart below are the seven largest firms in the industry and each firm recorded over 150 surveyed transferees. Many other RMC suppliers are shown in the lower portion of the chart reflecting smaller survey samples of less than 150. Evaluations of very small RMC firms are included in the *all other* category due to small sample sizes of less than 50 transferees.

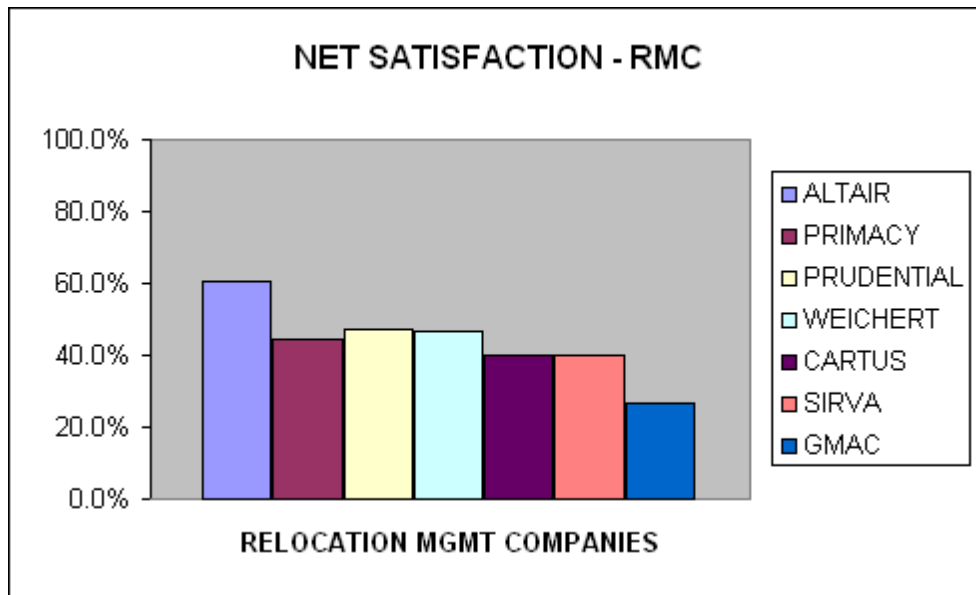
Transferees in this survey include any transferred employee regardless of home owner and renter status, and regardless of policy program received from the employer.

Supplier	Total Evaluations	Average Score	Top Block	Bottom Block	Net Satisfaction
<i>FIRMS WITH 150+ SURVEYS</i>					
Altair	173	8.58	64.7%	4.0%	60.7%
Primacy	402	8.46	47.8%	3.2%	44.5%
Prudential	755	8.31	55.5%	8.1%	47.4%
WRR	549	8.27	61.0%	14.4%	46.6%
Cartus	1716	8.15	52.4%	12.1%	40.3%
Sirva	597	8.12	48.4%	8.2%	40.2%
GMAC	187	7.95	38.0%	11.2%	26.7%
<i>FIRMS WITH UNDER 150 SURVEYS</i>					
NEI	87	8.37	54.0%	8.0%	46.0%
The MI Group	72	8.26	48.6%	9.7%	38.9%
Plus	58	8.22	48.3%	6.9%	41.4%
Paragon	112	8.16	50.9%	9.8%	41.1%
Excellerate HRO	92	7.85	32.6%	10.9%	21.7%
All others	369	8.24	45.8%	4.6%	41.2%
<b>TOTAL</b>	<b>5169</b>	<b>8.22</b>	<b>51.9%</b>	<b>9.6%</b>	<b>42.3%</b>

The following chart shows the 7 largest firms' average score.



The following chart shows net satisfaction for the seven largest firms.



Altair earned the largest average score and the highest net satisfaction percentage from transferred employees. Altair and Weichert had notable, high top-block percentages while Primacy had the lowest bottom-block percentage.

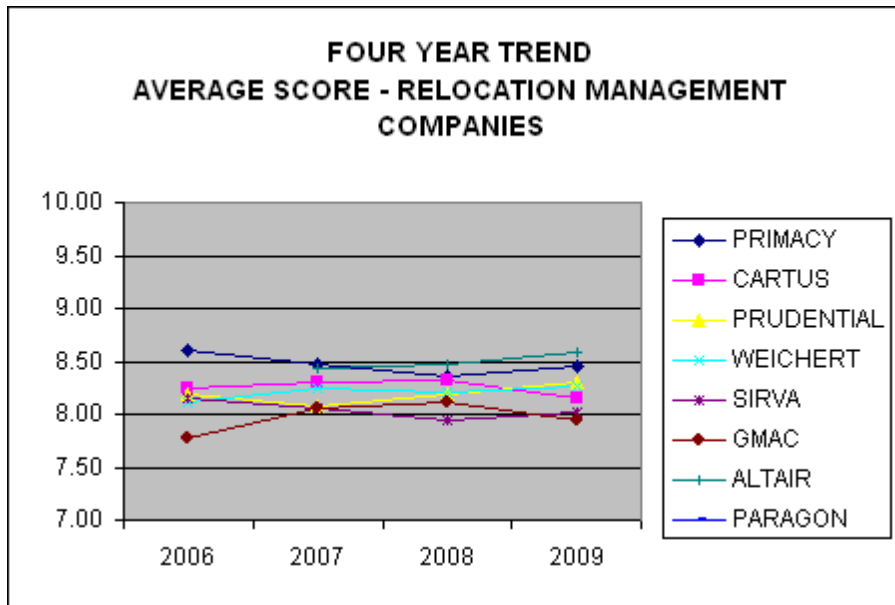
Four of the largest seven firms, Altair, Primacy, Prudential and Weichert, achieved above industry outcomes in satisfaction average score and net satisfaction percentage. Among smaller firms NEI also exceeded industry averages.

There are various changes in transferee satisfaction performance among the relocation management companies during the last few years.

YEAR	PRIMACY	CARTUS	PRUDENTIAL	WRRI	SIRVA	GMAC	ALTAIR
2006	8.61	8.24	8.19	8.12	8.16	7.77	
2007	8.47	8.30	8.08	8.25	8.06	8.05	8.43
2008	8.35	8.32	8.19	8.21	7.94	8.12	8.47
2009	8.46	8.15	8.31	8.27	8.02	7.95	8.58

Altair and Prudential demonstrated consistent improvement in the recent three years period while Primacy, Weichert and Sirva reversed a prior decline. Five of the seven firms earned higher transferee evaluations this year compared to last. Both GMAC and Cartus, which showed improvement in customer satisfaction the earlier three year period, showed a decline over the most recent year.

The chart on the next page graphs the four year trend for the top seven firms.



The seven firms graphed above show different degrees of change in customer satisfaction, which are not, unfortunately, easily discernable.

However, the chart does indicate the industry has less differentiation in customer satisfaction than it did four years ago. The spread between the best quality-producing firm and the lowest has gone from a differential of over 0.8 points to less 0.6 points.

Further, the industry average the entire four year period has remained in the 8.21 range plus or minus 0.02. This very tight band indicates very little overall change in industry-wide performance based on the metric expressed as customer satisfaction.

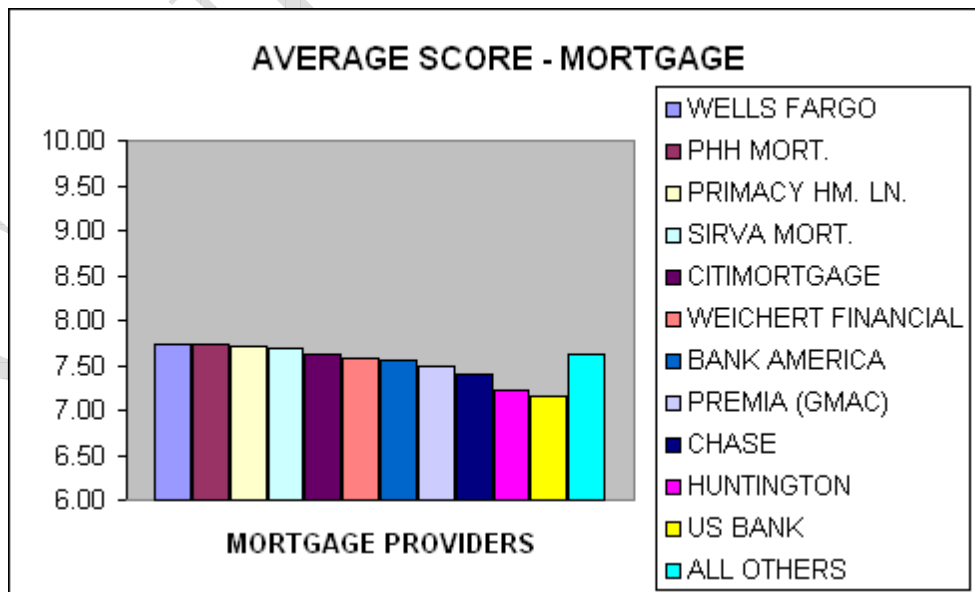
### 3. RELOCATION MORTGAGE PROVIDERS

Relocation Mortgage firms included in the chart below are the eleven largest firms in the industry and each firm had over 125 surveyed transferees. Evaluations of smaller mortgage firms are included in the *all other* category due to small sample sizes of transferees.

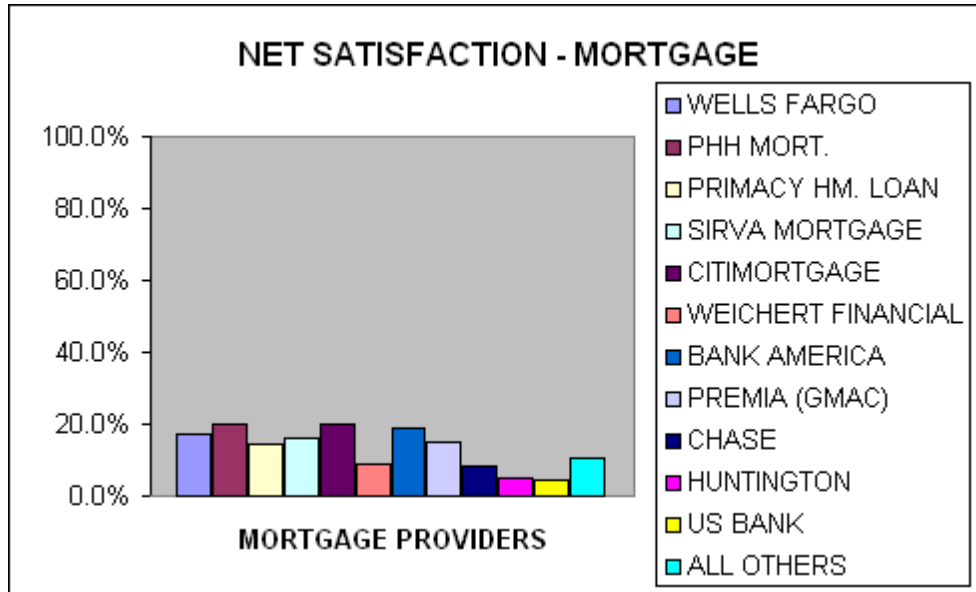
Supplier	Total Evaluations	Average Score	Top Block	Bottom Block	Net Satisfaction
Wells Fargo	1260	7.74	26.0%	8.9%	17.1%
PHH Mort	308	7.73	26.6%	6.5%	20.1%
Primacy Home Ln.	232	7.71	21.6%	7.3%	14.2%
Sirva Mortgage	210	7.69	24.8%	8.6%	16.2%
CitiMortgage	562	7.63	28.3%	11.2%	17.1%
Weichert Financial	179	7.58	18.4%	9.5%	8.9%
Bank of Amer.	742	7.55	30.2%	11.5%	18.7%
Premia (GMAC)	292	7.48	26.7%	11.6%	15.1%
JP Morgan Chase	188	7.40	21.3%	12.8%	8.5%
Huntington Mort.	195	7.23	20.5%	15.4%	5.1%
US Bank	128	7.16	29.7%	25.0%	4.7%
All others	217	7.62	21.7%	8.3%	13.4%
<b>TOTAL</b>	<b>4513</b>	<b>7.61</b>	<b>25.9%</b>	<b>10.4%</b>	<b>15.5%</b>

For comparative purposes three firms, Wells Fargo, PHH Mortgage and Primacy Home Loan had identical average scores with Sirva Mortgage slightly lower. PHH Mortgage earned the highest net satisfaction.

The following charts show competitors average score and net satisfaction (next page).

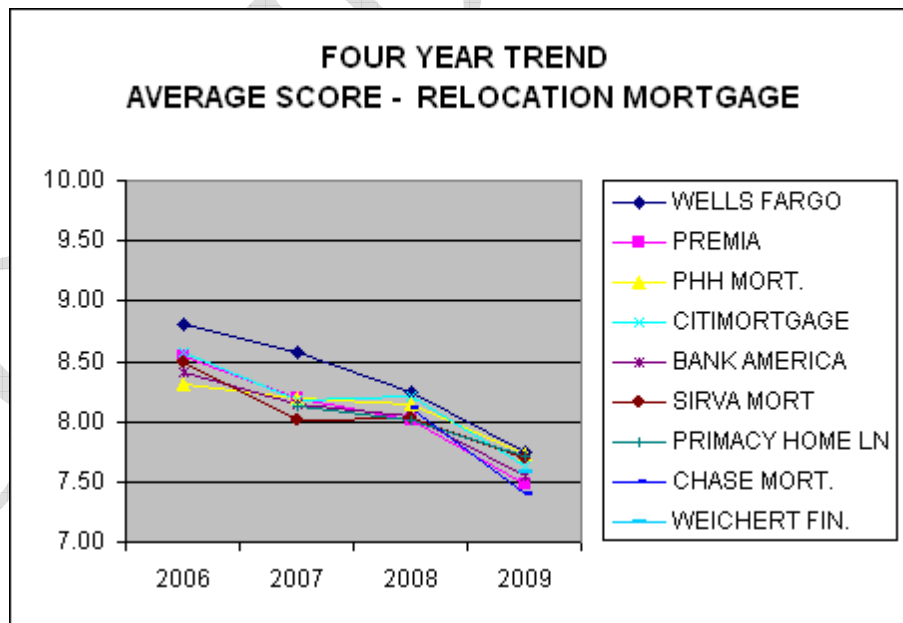






PHH Mortgage earned the overall highest net satisfaction percentage. Other noteworthy metrics: Bank of America earned the highest rate of top-block evaluations and Primacy Home Loan earned the lowest bottom-block rate percentage of scores.

Changes in mortgage providers' performance over the last three years are shown on the following chart.



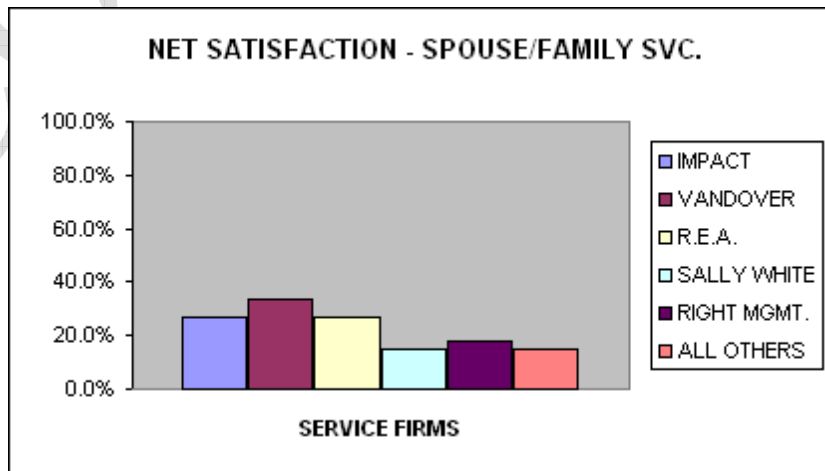
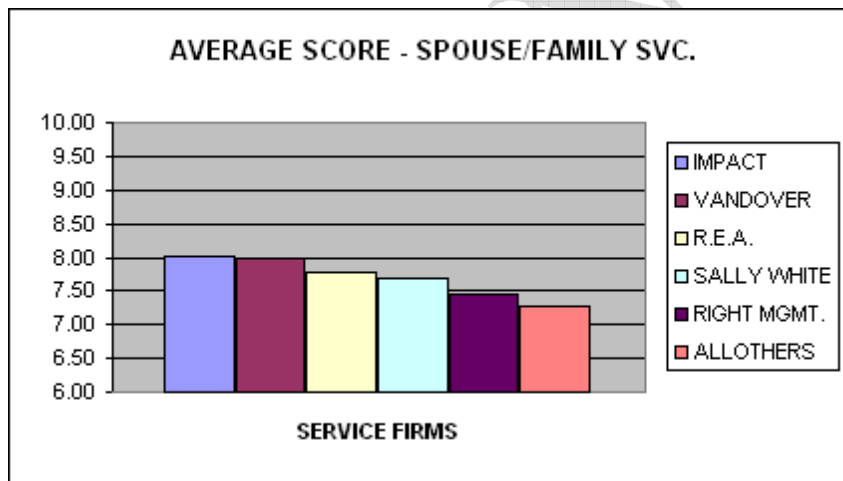
All major competitors realized a steady three-year decrease in customer satisfaction. From last year's survey the biggest declines in customer satisfaction were recorded by Chase, CitiMortgage and Premia (GMAC).

#### 4. SPOUSE FAMILY SERVICES

Service providers in the spouse-partner-family services are shown below.

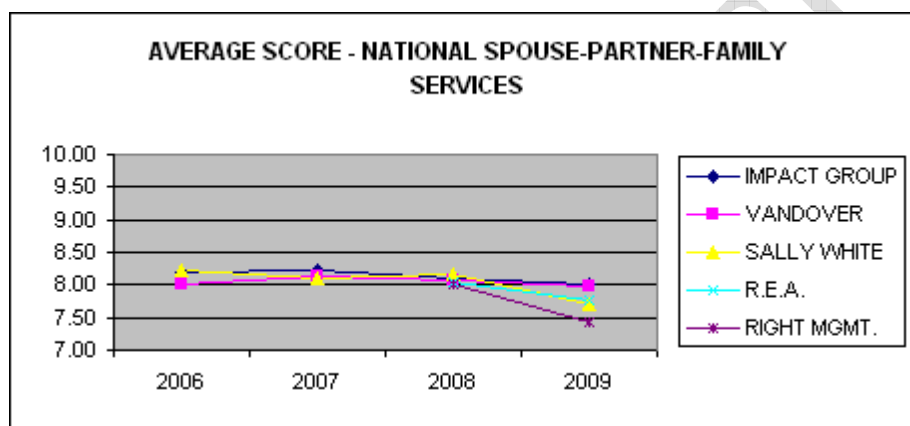
Supplier	Total Evaluations	Average Score	Top Block	Bottom Block	Net Satisfaction
IMPACT Group	273	8.01	31.5%	4.4%	27.1%
Vandover	173	7.98	37.6%	4.0%	33.5%
R.E.A.	101	7.77	39.6%	12.9%	26.7%
Sally White	252	7.70	23.8%	8.7%	15.1%
Right Mgm't.	129	7.44	30.2%	12.4%	17.8%
All others	68	7.26	30.9%	16.2%	14.7%
<b>TOTAL</b>	<b>996</b>	<b>7.78</b>	<b>31.2%</b>	<b>8.1%</b>	<b>23.1%</b>

Among the five largest providers, IMPACT Group earned the highest average score and Vandover earned the highest net satisfaction. These two organizations outpaced all other firms.



Changes in the performance of the suppliers in this industry reflect weakening of transferee satisfaction. All five firms show a decrease from one year ago and most firms recorded their highest customer satisfaction scores either 3 or 4 years ago. Over a four year period Vandover's performance is the most consistent.

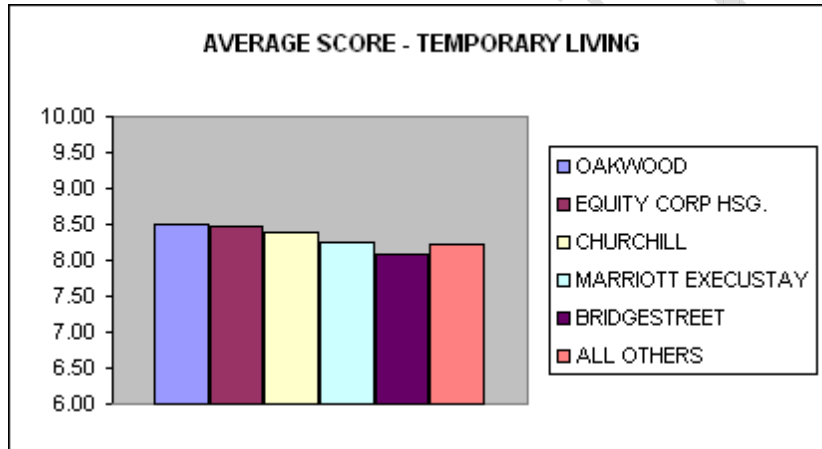
YEAR	IMPACT GRP.	VANDOVE R	SALLY WHITE	REA	RIGHT MGMT.
2006	8.18	8.01	8.21		
2007	8.22	8.12	8.09		
2008	8.09	8.06	8.15	8.03	8.02
2009	8.01	7.98	7.70	7.77	7.44



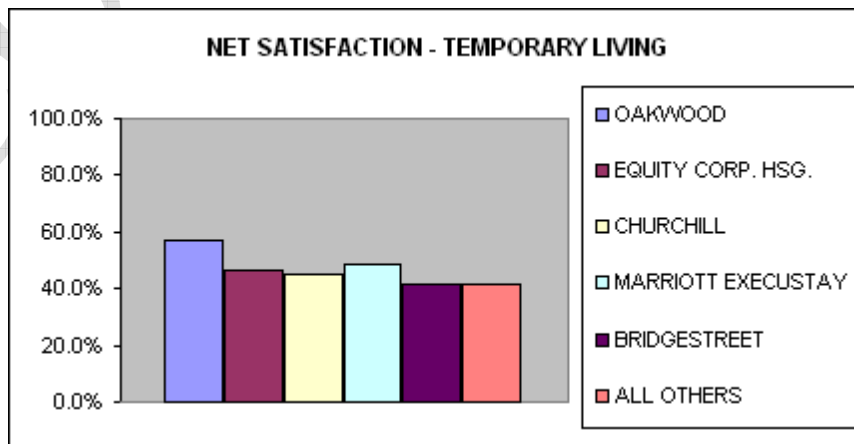
## 5. TEMPORARY HOUSING SERVICES

Firms providing temporary housing services to the transferee and family are included in the chart below. Evaluations of dozens of smaller temporary housing service firms are included in the *all other* category due to small transferees sample sizes.

Supplier	Total Evaluations	Average Score	Top Block	Bottom Block	Net Satisfaction
Oakwood Worldwide	1287	8.51	62.6%	5.5%	57.1%
Equity Corp. Housing	133	8.46	51.9%	5.3%	46.6%
Churchill	104	8.38	51.0%	5.8%	45.2%
Marriott Exec.	510	8.25	56.7%	8.2%	48.4%
BridgeStreet	367	8.07	51.2%	9.5%	41.7%
All others	1003	8.21	48.3%	6.4%	41.9%
<b>TOTAL</b>	<b>3404</b>	<b>8.33</b>	<b>55.5%</b>	<b>6.6%</b>	<b>48.9%</b>



Oakwood Worldwide earned the highest average score and net satisfaction among the five largest temporary living/housing suppliers.



Although Oakwood Worldwide earned the highest net satisfaction another notable outcome was realized by Equity Corporate Housing earning the lowest bottom block result.

Over a multi-year period (see charts below) customer satisfaction reflects changing performance. Oakwood has realized swings each year, while Marriott Execustay and Bridgestreet witnessed the least volatility. Equity Corporate Housing has increased its market share and improved performance both years the firm is recognized in this survey. This is the first year Churchill had a representative sampling.

YEAR	OAKWOOD	MARRIOTT EXECUSTAY	BRIDGESTREET T	EQUITY CORP. HOUSING
2006	8.37	8.18	8.31	
2007	8.54	8.45	8.11	
2008	8.19	8.15	8.12	8.05
2009	8.51	8.25	8.07	8.48

