

RELOCATION MANAGERS' SURVEY[®]



Highest Satisfaction
Rating in the Nation



Pricing • Program Administration Policy • Carrier Performance

**An independent survey performed by Trippel Survey & Research, LLC*

**15th ANNUAL RELOCATION MANAGERS' SURVEY®
on HOUSEHOLD GOODS SHIPMENT:
PROGRAM ADMINISTRATION, POLICY, PRICING &
CARRIER PERFORMANCE**

BACKGROUND

Trippel Survey & Research, LLC conducts this annual survey to (1) obtain evaluations from corporate relocation managers regarding their level of satisfaction with the moving service suppliers utilized in Domestic US relocation, and (2) obtain current information on HHG policy and program management pertinent and relevant to managing Domestic US relocation activity. This survey did not have corporate sponsorship.

METHODOLOGY

This is the fifteenth annual *Relocation Managers' Survey®* on Household Goods policy, pricing, administration and industry supplier performance. Corporate relocation managers received an email message announcing the survey on January 30, 2017. A reminder notice was sent and the survey closed February 8th.

Of the 1,592 initial invitations 115 were hard or soft bounced and 26 opted out. Among the remaining invitations 288 managers participated.

Survey responses are presented in this report as reported by *SurveyMonkey*, 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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INDEX

<u>Topic</u>	<u>Page</u>
Profile	2
Policy	4
Performance of HHG suppliers	
For corporations without HHG contracts	7
For corporations with contracts	9
Bonus section – additional policy	13

CORPORATE PARTICIPANT PROFILE

The following chart shows the count of corporate managers participating in this survey (288) and giving their email address.

Email address (used to send you the final report).	
Answer Options	Response Count
	287
<i>answered question</i>	287
<i>skipped question</i>	1

The number of participants this year (288) is lower than the 301 participants in 2016 survey.

ANTICIPATED 2017 DOMESTIC U.S. VOLUME

Your anticipated 2017 domestic relocation volume range?		
Answer Options	Response Percent	Response Count
1- 50	17.8%	51
51-100	15.7%	45
101-250	30.8%	88
251-500	19.6%	56
501-1000	10.1%	29
Over 1001	5.9%	17
<i>answered question</i>		286
<i>skipped question</i>		2

Compared to 2016, this year's survey indicates:

- an increase in the percentage of firms moving under 100,
- a slight decrease in the percentage of firms in the ranges above 500.

Overall, corporations anticipate a small decrease in 2017 US domestic volume compared to 2016. This is consistent with the prediction in October by these same managers in the annual "RMC survey."

USE OF RELOCATION MANAGEMENT COMPANY

Which organization manages and oversees the daily activities of your US domestic household goods shipments?		
Answer Options	Response Percent	Response Count

Our Relocation Management Company	61.0%	172
In-House administration	30.8%	87
Another service provider other than the above	8.2%	23
<i>answered question</i>		282
<i>skipped question</i>		6

In 2017, 61% of corporations use a relocation management company to manage and oversee the daily activities of US domestic household good shipments. This percentage is slightly lower than reported in the 2016 survey a year ago.

HOUSEHOLD GOODS SHIPMENT POLICY

PHILOSOPHICAL APPROACH TO POLICY DESIGN

Multiple selections were permitted; the total percentage is over 100%.

Which of the following approaches are used to provide HHG benefits to employees in a domestic US move? You may select multiple answers to explain your HHG model.	
Answer Options	Response Percent
All existing employees receive the same HHG benefits	64.9%
HHG benefits are on a 'sliding scale': higher organizational levels obtain more HHG benefits while lower organizational levels fewer HHG benefits	27.0%
New hires generally receive fewer HHG benefits than current employees	6.8%
Homeowners generally receive more HHG benefits than renters	20.3%
Transferees with a family receive more HHG benefits than single transferees	1.4%

Nearly two-thirds of companies strive to offer the same HHG benefits, regardless of tenure or organizational position, to all employees. This is the same percentage as the 2016 survey.

PERMITTED NUMBER OF CARS SHIPPED

For existing employees how many cars are typically shipped?		
Answer Options	Response Percent	Response Count
One car if minimum distance or mileage is met	17.8%	49
One plus a second car if minimum distance or mileage is met	52.2%	144
One car for each eligible family member if minimum distance or mileage is met	5.4%	15
Another answer; none of the 3 above	24.6%	68
<i>answered question</i>		276
<i>skipped question</i>		12

This is the first year this question is asked. A majority of corporations provide transportation of a second car if mileage requirement is met, while only 17% restrict shipments to one car.

MAXIMUM INSURANCE COVERAGE

Do you have a maximum amount for HHG insurance for a shipment?		
Answer Options	Response Percent	Response Count
No	50.2%	141
Yes - for certain positions	3.9%	11
Yes - all positions	45.9%	129
<i>answered question</i>		281
<i>skipped question</i>		7

Corporations are split equally in whether or not to limit insurance coverage. The percentage indicating there should be a limit on coverage increased five points from last year.

MAXIMUM WEIGHT OR COST TO SHIP HOUSEHOLD GOODS

Do you have either a maximum weight or cost for HHG shipments?		
Answer Options	Response Percent	Response Count
No	80.9%	224
Yes - for certain positions	6.9%	19
Yes - all positions	12.3%	34
<i>answered question</i>		277
<i>skipped question</i>		11

This is the first year this question is asked. Over 80% of corporations do not put a limit on weight of shipments or cost to move household goods.

STORAGE

Does your policy allow storage?		
Answer Options	Response Percent	Response Count
No	7.8%	22
Yes - for certain positions	21.3%	60
Yes - certain situations	17.4%	49
Yes - all positions	53.5%	151

<i>answered question</i>	282
<i>skipped question</i>	6

This is the first year this question is asked. A 53% majority of companies permit all employees to store household goods while a small 8% do not permit storage.

DURATION OF STORAGE

If and when storage is permitted by policy what is the maximum duration?		
Answer Options	Response Percent	Response Count
Storage not allowed	7.8%	22
30 days (1 month)	30.6%	86
60 days (2 months)	45.6%	128
Another maximum duration	16.0%	45
<i>answered question</i>		281
<i>skipped question</i>		7

Storage, when permitted, is capped at 60 days by 45% of companies and 30 days by another 30%. These pair of percentages is unchanged from past surveys.

CORPORATIONS DIRECTLY CONTRACTING WITH SUPPLIERS

Do you have any contracts/agreements signed with any household goods carriers?		
Answer Options	Response Percent	Response Count
Yes	60.4%	169
No	39.6%	111
<i>answered question</i>		280
<i>skipped question</i>		8

This year over 60% of corporations report they have signed contracts with HHG carriers. Although this is a decrease from last year's survey, it is more in line with the percentage reported in the years prior to 2016.

NOTE: survey respondents with HHG contracts and those without contracts are differentiated the next two sections of this report.

AMONG 111 CORPORATIONS NOT CONTRACTING WITH SUPPLIERS

INVOLVEMENT OF RELOCATION MANAGEMENT COMPANY

Do you use the services of a relocation management company to administer your household goods program?		
Answer Options	Response Percent	Response Count
Yes	96.4%	107
No	3.6%	4
<i>answered question</i>		111
<i>skipped question</i>		0

Among the 111 corporations in this survey not contracting with HHG carriers nearly all use the services of a relocation management company for household goods program administration.

OVERALL SATISFACTION WITH SUPPLIERS

Survey respondents (111 from above sampling) provided evaluations of the carriers regarding Overall satisfaction. Because the RMC is administering the HHG program corporate managers might not have data to evaluate performance on specific activities. Hence, only 1 question on overall manager satisfaction.

	Scores >										Count	Aver.	Top	Bottom	Net
	1	2	3	4	5	6	7	8	9	10			Block %	Block %	Satis. %
Allied Worldwide					1	1	3	10	8	3	26	8.23	42%	8%	35%
Arpin Van Lines							2	2	5	4	13	8.85	69%	0%	69%
Atlas Van Lines				1	1	7	11	19	18		57	8.75	65%	4%	61%
Budd Van Lines						3	5	10	8		26	8.88	69%	0%	69%
Graebel Company				1		3	4	4	3	15	8.27	47%	7%	40%	
Mayflower						2	2	2	2	8	8.50	50%	0%	50%	
Merchants						1	3	2	3	9	8.78	56%	0%	56%	
New World Van Lines						1	8	5	6	20	8.80	55%	0%	55%	
NorthAmerican							5	11	5	2	23	8.17	30%	0%	30%
United Van Lines					1	11	26	27	9	74	8.43	49%	1%	47%	
Wheaton						1		1		2	8.00	50%	0%	50%	
Other not listed							1		1	2	9.00	50%	0%	50%	
	0	0	0	0	3	3	39	83	88	59	275	8.55	53%	2%	51%

Among the corporations without HHG contracts outsourcing the program to an RMC the evaluations indicate:

- The largest carriers used by RMCs are a pair of franchise/agents systems: United and Atlas.
- Corporate managers evaluated an average 2.5 carriers each. This ratio is consistent with past years indicating many corporations request the RMC use specific firms for a large number of shipments.

- Among all carriers the highest / best evaluations were earned by Budd, Arpin, New World and Merchants (low sample for a few suppliers – caution).
- The highest / best evaluations, based on survey sample size, recorded by managers were, in high to low order:
 - Small sample sizes: Arpin and Merchants
 - Large sample sizes: Budd and Atlas
- The highest / best evaluations among different business models were, in high to low order:
 - Franchise-agent systems: Arpin, Atlas and Mayflower
 - Independents: Budd, New World and Merchants

AGENT IDENTIFICATION

Among the agents mentioned and evaluated by multiple corporate managers are:

Allied	Mills
Allied	Berger
Allied	Prestige
Allied	Mills
Atlas	Nelson Westerberg
Atlas	Alexander's
Atlas	Imlach Brothers
Atlas	Paxton
Atlas	Shetler
Atlas	Reads Moving Systems
Mayflower	Darryl Flood
northAmerican	A-1 Freeman
northAmerican	Ward
United	Armstrong
United	Planes
United	William B. Meyers
United	Hilldrup
United	Suddath
United	McCollisters
United	S&M
United	Corrigan Moving Systems

For any corporate manager requesting specific scores on agents please send a note to Alan at Trippel Survey & Research.

AMONG 169 CORPORATIONS CONTRACTING WITH HHG SUPPLIERS

FLEXIBILITY TO SELECT NON-CONTRACTED CARRIER

This is a new question to this year's survey.

To what degree must the RMC use contracted suppliers?		
Answer Options	Yes	Response Percent
Our RMC or other external partner can award moves to the best-qualified or available carrier.	9	5.3%
We expect all our moves to go to the contracted HHG carrier(s)	132	78.1%
Although we prefer moves to go to certain HHG carriers our RMC has a degree of flexibility to award moves to other carriers	28	16.6%

A large majority of 78% state the RMC must award shipments to the contracted carriers.

PERFORMANCE

Corporate managers with contracts were encouraged to share evaluations on certain HHG activities on a 1-low to 10-high scale. These activities are, based on an earlier survey, the most important attributes to the transferee and corporate client driving overall satisfaction.

BEGIN PACK & LOAD ACTIVITIES ON THE AGREED DAY AND TIME

	1	2	3	4	5	6	7	8	9	10	Count	Aver.	Top Block %	Bottom Block %	Net Satis. %
Allied Worldwide					1		5	11	7	5	29	8.31	41%	3%	38%
Arpin Van Lines							2	1	3	3	9	8.78	67%	0%	67%
Atlas Van Lines						1	4	4	12	8	29	8.76	69%	3%	66%
Budd Van Lines							1	4	3	3	11	8.73	55%	0%	55%
Graebel Company					1		3	2	3	3	12	8.25	50%	8%	42%
Mayflower							1	2	1	2	6	8.67	50%	0%	50%
Merchants							1		2	1	4	8.75	75%	0%	75%
New World Van Lines							1	2	4	3	10	8.90	70%	0%	70%
NorthAmerican							2	1	3	2	8	8.63	63%	0%	63%
United Van Lines					1	1	5	6	13	8	34	8.56	62%	6%	56%
Wheaton								1	1		2	8.50	50%	0%	50%
Other not listed					1		7	8	3	4	23	8.04	30%	4%	26%
	0	0	0	0	4	2	32	42	55	42	177	8.51	55%	3%	51%

New World, Arpin and Atlas earned the highest evaluations. Caution: a number of carriers, example Merchants, have very small sample sizes.

BEGIN UNLOAD ACTIVITIES ON THE AGREED DAY AND TIME

	1	2	3	4	5	6	7	8	9	10	Count	Aver.	Top Block %	Bottom Block %	Net Satis. %
Allied Worldwide						1	7	10	6	5	29	8.24	38%	3%	34%
Arpin Van Lines							2	2	3	2	9	8.56	56%	0%	56%
Atlas Van Lines						1	5	5	11	7	29	8.62	62%	3%	59%
Budd Van Lines							1	4	3	3	11	8.73	55%	0%	55%
Graebel Company						1	3	2	3	3	12	8.33	50%	8%	42%
Mayflower							1	2	1	2	6	8.67	50%	0%	50%
Merchants							1		2	1	4	8.75	75%	0%	75%
New World Van Lines							1	3	4	2	10	8.70	60%	0%	60%
NorthAmerican							2	1	3	2	8	8.63	63%	0%	63%
United Van Lines					1	1	5	9	10	8	34	8.47	53%	6%	47%
Wheaton								1	1		2	8.50	50%	0%	50%
Other not listed						1	8	8	3	3	23	7.96	26%	4%	22%
	0	0	0	0	1	5	36	47	50	38	177	8.44	50%	3%	46%

Budd, New World, northAmerican and Atlas earned the highest evaluations.

Caution: a number of carriers have very small sample sizes.

LEVEL OF OVERALL TRANSFEREE SATISFACTION

	1	2	3	4	5	6	7	8	9	10	Count	Aver.	Top Block %	Bottom Block %	Net Satis. %
Allied Worldwide						1	5	10	7	6	29	8.41	45%	3%	41%
Arpin Van Lines							3	2	2	2	9	8.33	44%	0%	44%
Atlas Van Lines				2			7	6	9	5	29	8.21	48%	7%	41%
Budd Van Lines							2	3	3	3	11	8.64	55%	0%	55%
Graebel Company						1	3	5	2	1	12	7.92	25%	8%	17%
Mayflower							2	1	2	1	6	8.33	50%	0%	50%
Merchants							1	1	1	1	4	8.50	50%	0%	50%
New World Van Lines							3	2	3	2	10	8.40	50%	0%	50%
NorthAmerican							2	2	2	2	8	8.50	50%	0%	50%
United Van Lines					1		9	9	8	7	34	8.29	44%	3%	41%
Wheaton								1	1		2	8.50	50%	0%	50%
Other not listed						1	9	8	3	2	23	7.83	22%	4%	17%
	0	0	0	0	3	3	46	50	43	32	177	8.26	42%	3%	39%

The highest evaluations were earned by Budd, Allied, northAmerican and New World.

Caution: a number of carriers have very small sample sizes.

ACCURACY OF INVOICES

	1	2	3	4	5	6	7	8	9	10	Count	Aver.	Top Block %	Bottom Block %	Net Satis. %
Allied Worldwide							6	10	6	6	28	8.43	43%	0%	43%
Arpin Van Lines							1	2	2	4	9	9.00	67%	0%	67%
Atlas Van Lines							4	3	10	12	29	9.03	76%	0%	76%
Budd Van Lines							1	2	5	3	11	8.91	73%	0%	73%

Graebel Company							8	2	2	12	8.50	33%	0%	33%	
Mayflower							1	1	2	2	6	8.83	67%	0%	67%
Merchants							1		2	1	4	8.75	75%	0%	75%
New World Van Lines							1	2	3	4	10	9.00	70%	0%	70%
NorthAmerican							2	2	3	1	8	8.38	50%	0%	50%
United Van Lines					1		5	10	10	7	33	8.48	52%	3%	48%
Wheaton								2			2	8.00	0%	0%	0%
Other not listed					1		4	9	6	3	23	8.22	39%	4%	35%
	0	0	0	0	2	0	26	51	51	45	175	8.62	55%	1%	54%

Many carriers earned high scores for this attribute and a few exceeded 70% net satisfaction (“excellence”).

Caution: a number of carriers have very small sample sizes.

CLAIMS SETTLED WITHIN A SPECIFIED TIME FRAME

	1	2	3	4	5	6	7	8	9	10	Count	Aver.	Top Block %	Bottom Block %	Net Satis. %
Allied Worldwide					1		7	12	4	5	29	8.14	31%	3%	28%
Arpin Van Lines							3	3	2	1	9	8.11	33%	0%	33%
Atlas Van Lines						1	7	3	9	9	29	8.62	62%	3%	59%
Budd Van Lines							2	3	4	2	11	8.55	55%	0%	55%
Graebel Company							3	6	1	2	12	8.17	25%	0%	25%
Mayflower							1	2	1	2	6	8.67	50%	0%	50%
Merchants									2	2	4	9.50	100%	0%	100%
New World Van Lines							2	2	3	3	10	8.70	60%	0%	60%
NorthAmerican							2	3	2	1	8	8.25	38%	0%	38%
United Van Lines							9	12	8	5	34	8.26	38%	0%	38%
Wheaton								1		1	2	9.00	50%	0%	50%
Other not listed							7	9	5	2	23	8.09	30%	0%	30%
	0	0	0	0	1	1	43	56	41	35	177	8.36	43%	1%	42%

New World, Atlas and Budd earned the highest evaluations.

Caution: a number of carriers have very small sample sizes.

CLAIMS SETTLED WITHIN A SPECIFIED TIME FRAME

	1	2	3	4	5	6	7	8	9	10	Count	Aver.	Top Block %	Bottom Block %	Net Satis. %
Allied Worldwide							6	10	8	5	29	8.41	45%	0%	45%
Arpin Van Lines							2	3	2	2	9	8.44	44%	0%	44%
Atlas Van Lines					1		6	4	8	10	29	8.66	62%	3%	59%
Budd Van Lines							3	2	3	3	11	8.55	55%	0%	55%
Graebel Company							2	5	3	2	12	8.42	42%	0%	42%
Mayflower								2	2	2	6	9.00	67%	0%	67%
Merchants								1	2	1	4	9.00	75%	0%	75%
New World Van Lines							1	3	2	4	10	8.90	60%	0%	60%
NorthAmerican							2	2	2	2	8	8.50	50%	0%	50%
United Van Lines						1	8	10	9	6	34	8.32	44%	3%	41%
Wheaton								1	1		2	9.50	100%	0%	100%

Other not listed					1	5	10	5	2	23	8.04	30%	4%	26%	
	0	0	0	0	2	1	35	52	47	40	177	8.47	49%	2%	47%

New World, Budd and Atlas earned the highest evaluations.

Caution: a number of carriers have very small sample sizes.

TIMELINESS OF INVOICES SENT TO YOU

	1	2	3	4	5	6	7	8	9	10	Count	Aver.	Top Block %	Bottom Block %	Net Satis. %
Allied Worldwide					1	2	9	8	4	5	29	7.93	31%	10%	21%
Arpin Van Lines							2	2	3	2	9	8.56	56%	0%	56%
Atlas Van Lines				1			7	7	8	6	29	8.34	48%	3%	45%
Budd Van Lines							2	4	3	2	11	8.45	45%	0%	45%
Graebel Company							2	6	2	2	12	8.33	33%	0%	33%
Mayflower							2	1	1	2	6	8.50	50%	0%	50%
Merchants								3		1	4	8.50	25%	0%	25%
New World Van Lines							3	2	3	2	10	8.40	50%	0%	50%
NorthAmerican							2	3	3		8	8.13	38%	0%	38%
United Van Lines				2	1		7	8	12	4	34	8.06	47%	9%	38%
Wheaton							1			1	2	8.50	50%	0%	50%
Other not listed				1			7	8	4	3	23	8.00	30%	4%	26%
	0	0	0	2	4	2	44	52	43	30	177	8.20	41%	5%	37%

Arpin and Budd earned the highest evaluations.

Caution: a number of carriers have very small sample sizes.

LIKELIHOOD OF USING SAME CARRIER A YEAR FROM NOW

This survey question identifies the carriers likely to retain business a year from now.

HHG Carrier	Yes	No
Allied Worldwide	29	
Arpin Van Lines	9	
Atlas Van Lines	29	
Budd Van Lines	11	
Graebel Company	12	
Mayflower	6	
Merchants	4	
New World Van Lines	10	
NorthAmerican	8	
United Van Lines	33	1
Wheaton	2	
Other not listed	22	1
Total >	175	2

BONUS SECTION INCLUDING ADDITIONAL HHG POLICY (Not asked in this current research)

The information provided below is shared with corporate managers only and represents the collective information learned the last 18 months in various US domestic policy research related to corporate household goods shipment policy.

After forty years of relocation experience I learned corporate policy, when viewed from a holistic broad view ,does NOT change significantly over a year-to-year basis. Certainly corporations might tweak policy year-to-year, but when a large sample is surveyed the percentages rarely change more than a couple percentage points plus or minus from a prior period. Hence, the policy findings surveyed during the past year or two are as relevant and as indicative of reality today as they were when asked previously.

HOUSEHOLD GOODS POLICY

NUMBER OF HHG SHIPMENT PERMITTED

How many household goods shipments are covered by policy?	
Answer Options	Response Percent
1 move: old location to new location only	39.7%
2 moves: old location to storage (if permitted) and to new location	50.0%
Depends on HHG policy provided to individual	10.3%
Another answer not above	0.0%
Not stated in policy	0.0%

One-half of corporations permit 2 moves if storage is permitted, otherwise only 1 move.

HHG STORAGE

This is a new question in this year's 2016 survey.

Are any of the following organizational positions authorized/eligible for HHG storage?		
Answer Options	Yes	No
Executive	92%	8%
Senior manager or Director	91%	9%
Manager	87%	13%

Professional or Non-managerial	78%	22%
Exempt non-professional	68%	32%
Experienced new hire	74%	26%
College new hire	41%	59%

HHG storage is a widely acceptable benefit but does vary with employee grade or organizational position.

COMMON FEATURES AMONG CORPORATE HHG POLICY

Which transferees, if any, obtain the specific HHG benefits listed below?			
Answer Options	Yes, ALL employees obtain benefit	Yes, SOME but not all employees obtain	No employees obtain the benefit
Packing	86%	14%	0%
Crating and Uncrating	83%	16%	1%
Normal appliance servicing	86%	13%	1%
Loading, Delivery and Unloading	86%	14%	0%
Unpacking services	59%	22%	19%
Removal of debris upon completion of move	80%	16%	4%
Loading or unloading on weekend or holiday	11%	35%	54%
Pickup and delivery from storage to new home	61%	28%	11%
Pickup and delivery from temporary living location to new home	20%	32%	48%
Transportation of pets	20%	13%	68%
Transportation of more than 1 car	55%	32%	13%
Another feature not noted above (describe below)	35%	0%	65%

With some differences from 2015 the eligibility for certain HHG benefits are the same. A few notable differences in the 2016 survey:

- Slightly more corporations are offering Crating & Uncrating (now 83% from 78%) is more prevalent,
- Normal appliance servicing (now 86% was 76%) is more prevalent,

- Removal of debris (now 80% was 75%) is more prevalent, and
- Pickup or Delivery to/from storage (now 61% was 54%) is more prevalent.

FREQUENCY OF HHG POLICY EXCEPTIONS

As a general philosophy does your company make exceptions to HHG policy?		
Answer Options	Response Percent	Response Count
Frequently	8.2%	34
Occasionally	44.7%	185
Infrequently	30.0%	124
Rare or Never	17.1%	71
<i>answered question</i>		414
<i>skipped question</i>		3

These percentages are the same as in the prior 2015 survey.