**ELEVENTH ANNUAL**

***RELOCATION MANAGERS’ SURVEY*©**

**on the HOUSEHOLD GOODS INDUSTRY**

# **BACKGROUND**

Trippel Survey & Research, LLC conducted this survey to (1) obtain evaluations from corporate relocation managers regarding their level of satisfaction with the moving service suppliers utilized in USA transferee relocation, and (2) gather information on issues, trends and HHG program management pertinent and relevant to managing domestic USA moves.

**METHODOLOGY**

This is the eleventh annual *Relocation Managers’ Survey*© on the HHG industry. Relocation managers received one email message with two reminder notices during the two following weeks. 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 13 and closed January 26, 2013. Of the 1,292 initial invitations sent via email 14 were undeliverable. From the 1,278 delivered survey invitations 468 survey responses were received. This is the largest support ever received for this for this survey and represents a 36% response rate.

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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**KEY INSIGHTS FROM SURVEY**

1. 468 corporations participated in this annual survey – a record number
2. Overall satisfaction with industry performance remained the same from the prior year; average satisfaction increased slightly while net satisfaction decreased slightly.
3. Approximately 60% of survey participants expect to move under 250 domestic employees this year and the overall expectation is for higher volume in 2013 compared to 2012.
4. Approximately 58% of corporations hold HHG contracts, a significantly increase from 2012 and more in-line with past metrics. Among those companies holding contracts with HHG suppliers the typical duration is 3 years. However, the trend line is for shorter durations.
5. The three most highly sought after needs of the corporate manager are all transferee oriented: transferee satisfaction, meeting the moving schedule and minimizing claims.
6. More than 50% of companies expect the intermediary (service distribution channel member between the corporation and carrier) to use the designated preferred or contracted carriers for moves all moves. The trend line is for more business to go to preferred carriers.
7. Having the same driver manage the entire move is not critically important to managers.
8. Most companies use the intermediary for three tasks: (a) monitor the assignment of moves to the preferred carriers, (b) calculate claims ratios, and (c) perform audits of HHG invoices. Few companies perform these tasks internally.
9. Companies do not offer long term storage on domestic USA moves and use the carrier’s insurance program.
10. 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.
11. Regarding pricing, 50% of companies continue to rely on the “400N” model and the other 50% have migrated towards negotiated pricing. The trend is away from 400N.
12. Very few firms use “alternative” forms of household goods shipments, such as self-pack & haul. Those few companies using this form of shipment typically implement this alternative for lower level employees.
13. Employees receiving a lump sum to cover their HHG shipments are not required to use a preferred supplier and may use whatever shipment mode they desire.
14. Relocation management companies continue to be the most prevalent form of intermediary. However, the overall satisfaction of this intermediary is no better than using an internal department and bypassing the intermediary.
15. Over 80% of companies prefer to use more than one carrier for their business; same as previous years. Slightly more than one-half of companies did not change preferred suppliers in 2012; of those changing slightly more added a carrier than reduced the number of carriers. The trend line indicates a slight rise in the number of contracted-preferred carriers.
16. Over 90% of companies claim an audit is performed on invoices. Of those performing the audit nearly one-half (46%) state there is a financial benefit while one-quarter (23%) claim there is no benefit and the remaining managers are not sure if there is a financial benefit.
17. United Van Lines remains the largest supplier represented in this survey.
18. Among the franchise/agent carrier systems United and Arpin are arguably the best performers covering all the attributes covered in the survey. Among the independent carriers Clark & Reid, Budd and New World are providing the most satisfying services.

**CORPORATE PARTICIPANT PROFILE AND PROGRAM ADMINISTRATION**

The following chart shows the count of corporate managers participating in this survey.

|  |  |
| --- | --- |
| **Company name or your primary industry.** | |
| **Answer Options** | **Response Count** |
|  | 469 |
| ***Answered Question*** | **468** |
| ***Skipped Question*** | **1** |

**ANTICIPATED DOMESTIC U.S.A. VOLUME IN 2013**

The following chart shows the anticipated 2013 ranges of domestic (USA) volume and % of companies’ expecting certain volume in 2013.

|  |  |  |
| --- | --- | --- |
| **Your anticipated domestic annual move range (all moves: homeowners and renters) for 2013?** | | |
| **Answer Options** | **Response %** | **Response Count** |
| 1- 50 | 24.5% | 114 |
| 51-100 | 13.2% | 62 |
| 101-250 | 23.9% | 112 |
| 251-500 | 20.1% | 95 |
| 501-1000 | 9.4% | 44 |
| 1001-2000 | 5.0% | 23 |
| Over 2000 | 3.8% | 17 |
| ***Answered Question*** | | **467** |

Comparing the distribution mix to last year corporate managers expect higher anticipated volume in 2013 than the prior year.

**CORPORATIONS HOLDING SUPPLIER CONTRACTS**

Approximately 58% of corporations hold contracts with carriers.

|  |  |  |
| --- | --- | --- |
| **Does your company hold the contracts with the moving services providers?** | | |
| **Answer Options** | **Response %** | **Response Count** |
| Yes | 57.6% | 268 |
| No | 42.4% | 198 |
| ***Answered Question*** | | **466** |
| ***Skipped Question*** | | **2** |

This affirmative response is higher than last year’s rate in which 49% answered “yes.” This year’s rate of 57+% is more in line with the 2011 survey reporting 65%.

**DURATION OF CONTRACTS WITH HHG SUPPLIERS**

Among the 268 corporations executing HHG contracts, 35% agree to 3-year contracts. Approximately 35% negotiate open-ended contracts with no fixed duration.

|  |  |  |
| --- | --- | --- |
| **If yes to the above question, what is the approximately duration of the typical contract?** | | |
| **Answer Options** | **Response Percent** | **Response Count** |
| One year or less | 10.8% | 29 |
| Two years | 15.1% | 40 |
| Three years | 35.5% | 94 |
| Four or more years | 3.2% | 9 |
| Open ended, no fixed duration | 35.5% | 94 |
| ***Answered Question*** | | **266** |
| ***Skipped Question*** | | **2** |

The percentage of companies holding contracts for one year doubled from 5% to nearly 11% over the past year. Conversely, the percentage holding contracts for four years or longer dropped from 9% to only 3% this year. Clearly, the trend is for shorter contract durations.

**NEEDS OF CORPORATE RELOCATION MANAGER**

Among the 465 corporations responding to this question, the most critical need among managers is “*maximum transferee satisfaction*” as seen on the chart on the following page.

Based solely on which attributes/needs earning the highest number of “votes” these were the top 5 in order:

1. Maximum transferee satisfaction
2. Meeting all scheduled moving dates (pack, load, delivery, unload) without delay
3. Problem resolution: fast, responsive and satisfying to the needs of stakeholders
4. Integrity and trust of every HHG representative to transferee and corp. manager
5. Minimizing claims and, if filed, fair and prompt resolution

These top 5 needs are identical to the expressed needs of corporate managers three years ago.

The 3 attributes mentioned most often as the “Top 3” are: *Transferee satisfaction*, *Meeting the delivery schedule* and *Minimizing claims*. All three are transferee oriented!

The following chart shows all 10 needs and distribution across each.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **When you consider the vast array of needs to satisfy in shipment of household goods, which of the following 10 needs do you rank as the 5 most critically important to you.** | | | | | | |
| **Answer Options** | | **#1 importance** | **#2 importance** | **#3 importance** | **#4 importance** | **#5 importance** |
| Maximum transferee satisfaction | | 60.7% | 8.9% | 3.7% | 8.1% | 18.5% |
| Maximum satisfaction for me (program manager) and key internal stakeholders |  | 8.0% | 26.0% | 14.0% | 24.0% | 28.0% |
| Meeting all the scheduled moving dates (pack, load, deliver, unpack) without delay | | 10.9% | 31.1% | 27.7% | 19.3% | 10.9% |
| Minimizing claims and where there is a claim fair and prompt resolution | | 8.1% | 23.2% | 31.3% | 25.3% | 12.1% |
| High value (that is, maximum benefits for the price paid for the move) | | 12.8% | 24.4% | 28.2% | 15.4% | 19.2% |
| Low pricing so HHG program costs are minimized | | 10.3% | 17.2% | 24.1% | 20.7% | 27.6% |
| A specific operating requirement (such as self-haul) |  | 18.2% | 0.0% | 54.5% | 18.2% | 9.1% |
| Integrity and trustworthiness of every touch-point representative to me and transferee | | 12.7% | 21.6% | 15.7% | 29.4% | 20.6% |
| Problem resolution which is fast, responsive to the expressed need and satisfying to all parties | | 9.3% | 13.8% | 19.3% | 22.9% | 34.9% |
| Useful web-based tools for me, internal stakeholders and our transferred employees | | 10.0% | 15.0% | 10.0% | 20.0% | 20.6% |

The five needs least critical are (#10 least critical):

1. Specific operating requirement, such as “direct haul”
2. Useful web based tools for transferee, stakeholders and manager

8. Low pricing so HHG program costs are minimized

7. Maximum satisfaction for me/manager and internal stakeholders

6. High value (maximum benefits for price paid)

**USE OF PREFFERED H.H.G. SUPPLIERS**

Among the 465 corporations answering the question, nearly six in ten (58.5%) expect the entire volume of corporation’s moving to go to carriers on “preferred list.” See chart below.

|  |  |  |
| --- | --- | --- |
| **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?** | | |
| **Answer Options** | **Response Percent** | **Response Count** |
| Yes, we expect all our moves to go to preferred moving suppliers | 58.5% | 272 |
| Yes, but our move management firm or relocation company has a degree of flexibility to award a move to non-preferred moving suppliers | 19.7% | 92 |
| 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 | 21.8% | 101 |
| ***Answered Question*** | | **465** |

Compared to last year’s survey, more managers expect all moves to go to the preferred moving supplier(s), 58% this year compared to 53% last year, while nearly 22% of companies have no preference.

**MONITORING DISTRIBUTION BUSINESS ACTIVITY**

With the majority of companies expecting certain HHG carriers to receive business the monitoring and controlling of activity is important. The following chart indicates the controlling process.

|  |  |  |
| --- | --- | --- |
| **How do you monitor whether your preferred or contracted carriers receive your desired level of business? If needed, selecting more than one answer is permitted.** | | |
| **Answer Options** | **Response Percent** | **Response Count** |
| Tracking is not monitored closely | 15.2% | 84 |
| We track ourselves | 29.1% | 160 |
| Our agents & carriers track and provide frequent feedback | 15.9% | 87 |
| Our agents & carriers track and provide infrequent feedback | 2.6% | 14 |
| Our relocation management company (or another intermediary) track and provide frequent feedback | 45.7% | 252 |
| Our relocation management company (or another intermediary) track and provide infrequent feedback | 16.6% | 92 |
| ***Answered Question*** | | **458** |

Note: respondents were permitted to provide more than one answer. This would typically happen if two parties monitor carrier selection; example internal department and an intermediary.

The answers indicate: (a) a small percentage do not monitor carrier-share, while (b) intermediaries perform the bulk of controlling and reporting of “*who gets how much*.”

**SELF HAUL DEFINED BY PARTICIPANTS**

Participants were asked to select a definition of “self-haul.” Chart is on next page.

|  |  |  |
| --- | --- | --- |
| **Many firms use the term "self-haul."  Which of the following represents the closest definition of self-haul to you?** | | |
| **Answer Options** | **Response Percent** | **Response Count** |
| Same driver start to finish; different crew | 13.7% | 60 |
| Same driver and crew start to finish | 24.7% | 109 |
| Same agent responsible from start to finish; possibly different crew | 28.8% | 127 |
| Same agent and same crew responsible from start to finish | 15.8% | 69 |
| Same van line from start to finish | 17.1% | 75 |
| ***Answered Question*** | | **440** |

There is a very wide array of definitions of “self-haul” with no single definition receiving as many as one-third of managers’ selection. Clearly there is no agreement on what this term means.

**IMPORTANCE OF THE SAME DRIVER HANDLING THE ENTIRE SHIPMENT**

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

|  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **How important it is for the driver of a move to manage the entire move: pack, load, deliver and unload?** | | | | | | | | | | | |
| **Answer Options** | 1, No importance | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10, Extremely important | Response Count |
|  | 6 | 9 | 12 | 3 | 26 | 29 | 68 | 115 | 65 | 130 | 463 |
|  | 1.3% | 1.9% | 2.5% | 0.6% | 5.7% | 6.4% | 14.6% | 24.9% | 14.0% | 28.1% |  |

Few managers, 42%, gave “top block” scores of 9 or 10 for the importance of the same driver handling the entire in shipment. This top-block percentage is slightly higher than last year (39%).

**APPROXIMATE 2012 CLAIMS RATIO**

Minimizing claims is an important need to transferees and corporate program managers.

|  |  |  |
| --- | --- | --- |
| **Approximately, what was your anticipated 2012 claims ratio?** | | |
| **Answer Options** | **Response Percent** | **Response Count** |
| I do not have the information | 43.4% | 201 |
| 0% - 5% | 32.7% | 151 |
| 5.1% - 10% | 13.2% | 61 |
| 10.1% - 15% | 5.7% | 26 |
| 15.1% - 20% | 3.8% | 18 |
| Over 20% | 1.3% | 6 |
| ***Answered Question*** | | **463** |

More than four in ten managers do not have an estimate of their employee’s claims ratio early in this calendar year. Among those with an estimate or specific data, nearly one-third state the claims ratio is under 5%.

**CLAIMS RATIO CHANGE FROM LAST YEAR**

More than three-quarters of corporate managers estimate the claims ratio of 2012 is approximately the same as it was in 2011.

|  |  |  |
| --- | --- | --- |
| **Is the claims rate you estimated above either higher, lower or the approximately the same as the prior year?** | | |
| **Answer Options** | **Response Percent** | **Response Count** |
| Approximately the same rate | 79.7% | 368 |
| Higher than the prior year | 5.2% | 24 |
| Lower than the prior year | 15.1% | 70 |
| ***Answered Question*** | | **462** |

**WHICH ORGANIZATION CREATES THE CLAIMS RATIO CALCULATION**

Claims ratio is an important metric. Managers selected among 3 alternatives on which organization calculates the ratio.

|  |  |  |
| --- | --- | --- |
| **How are your household goods claims metrics calculated?** | | |
| **Answer Options** | **Response Percent** | **Response Count** |
| Carriers self-calculate and report on a periodic basis | 33.8% | 156 |
| Metrics calculated by a relocation management or another third-party company | 62.7% | 289 |
| Metrics calculated by internal staff | 3.5% | 16 |
| ***Answered Question*** | | **461** |

Nearly two-thirds of companies expect the relocation management company or another intermediary to calculate the claims ratio metric.

**HOW ARE HHG SHIPMENTS INSURED**

Corporate manager stated how shipments are insured.

CHART ON NEXT PAGE

|  |  |  |
| --- | --- | --- |
| **How are domestic household goods shipments insured?** | | |
| **Answer Options** | **Response Percent** | **Response Count** |
| Insurance provided by household goods carriers | 77.6% | 357 |
| Self-insure | 13.3% | 61 |
| Other | 9.1% | 42 |

More than three-quarters (77%) of company’s use the carrier’s insurance program.

**DO YOU OFFER PERMANENT STORAGE FOR DOMESTIC HHG SHIPMENTS, IF YES, HOW SATISFIED ARE YOU WITH THE STORGE PROVIDER’S PERFORMANCE**

Most corporations do not offer permanent storage benefits during a domestic USA move.

|  |  |  |
| --- | --- | --- |
| **Do you offer permanent storage benefits in any of your domestic USA programs?** | | |
| **Answer Options** | **Response Percent** | **Response Count** |
| Yes | 19.5% | 168 |
| No | 80.5% | 695 |
| ***Answered Question*** | | **863** |

Among the few firms offering long term storage on domestic moves, the average score, when asked level of satisfaction, was 8.06 and a very low 39.4% offering top-block scores.

**HOW ARE HHG SHIPMENTS PRICED FOR YOUR COMPANY**

Corporate managers stated how HHG is priced.

|  |  |  |
| --- | --- | --- |
| **How are household goods shipments priced for your company?** | | |
| **Answer Options** | **Response Percent** | **Response Count** |
| Priced per move based on weight or other variables; using the traditional 400N methodology | 50.6% | 220 |
| Priced per move based on weight or other variables; based on negotiations with or by our relocation management company | 28.2% | 123 |
| Single Rate Factor for moves | 7.1% | 31 |
| Not too sure how our moves are priced | 11.5% | 50 |
| Another basis not listed above | 2.6% | 11 |
| ***Answered Question*** | | **435** |

Slightly more than one-half corporations price HHG shipments according to the former 400N-type standard methodology. More than one-quarter have migrated to another negotiated pricing structure.

**LUMP SUM AND HHG**

Many companies are migrating to a lump sum feature of their relocation program. The following question inquired whether HHG is, in whole or part, covered by lump sum and, if so, how employees select the carrier.

|  |  |  |
| --- | --- | --- |
| **If and only if your relocation policy provides a lump sum from which employees must or may use a portion of the payment to cover the cost of household goods shipments, then which of the following closely resembles your preference towards HHG carrier selection?** | | |
| **Answer Options** | **Response Percent** | **Response Count** |
| Employees must select a carrier from our preferred or contract carrier list. | 12.0% | 25 |
| Employees may select from our preferred/contract carrier list OR they can select another carrier. | 25.3% | 53 |
| Employees can pocket the payment and move on their own. | 51.8% | 108 |
| Another option not shown above. | 10.8% | 23 |
| ***Answered Question*** | | **209** |

Employees eligible for the lump sum may select their own carrier and/or move on their own and use the lump sum payment for another purpose.

**ALTERNATIVE APPROACHED TO HOUSEHOLD GOODS SHIPMENT**

Are corporate relocation managers using or anticipating using alternative forms of shipment of household goods? The answer continues, as in past years, a resounding “no.”

|  |  |  |
| --- | --- | --- |
| **Do you anticipate using or are you currently using alternative approaches to HHG shipment in 2013?  These alternatives might include container-type products/services such as PODS, ABF or other Self-Pack and Load services offered by many moving services providers.** | | |
| **Answer Options** | **Response Percent** | **Response Count** |
| No; we do not provide these alternatives now or are we anticipating changes this year | 67.9% | 310 |
| Yes, we are currently providing this form of shipment as part of our transfer program | 13.5% | 62 |
| Yes, we are considering this form of shipment to become an element/alternative in our program | *18.6%* | *85* |
| ***Answered Question*** | | **457** |

The results are the same this year as they were in last year’s survey with slightly more than two-thirds not offering this alternative or expecting to the upcoming year.

**WHICH EMPLOYEE TYPICALLY USES THE ALTERNATIVE APPROACH TO SHIPPING HOUSEHOLD GOODS**

Only a one-half the companies using or considering this form of shipment answer the question on which employees might use this shipment method.

|  |  |  |
| --- | --- | --- |
| **If you use or intend to use an alternative approach to HHG (PODS, Self-Pack & Load) which employees typically use (or you expect to use) this alternative to full services HHG?** | | |
| **Answer Options** | **Response Percent** | **Response Count** |
| All employees, mandatory | 1.4% | 2 |
| All employees, optional | 24.7% | 35 |
| Certain lower level employees only | 60.3% | 85 |
| Another segment of the population not stated above | 13.7% | 19 |
| ***Answered Question*** | | **141** |

The overwhelming percentage of companies, with an alternative approach to HHG, offers – or expects – this method to be used by lower-level transferees only. Another one-quarter expect this to be an optional approach for all employees.

**SATISFACTION WITH PERFORMANCE OF INTERMEDIARY**

Relocation managers rated the performance of the intermediary – a firm used in the middle of the delivery channel from corporation – to – carrier. Approximately 76% of companies use a relocation management company; while 20% use internal resources to administer the HHG.

|  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Listed below are four intermediaries who might be used to administer your HHG program?  Select the intermediary you use and provide an "overall satisfaction" score (10 high, 1 low).** | | | | | | | | | | | |  |
| **Answer Options** | **1, low** | **2** | **3** | **4** | **5** | **6** | **7** | **8** | **9** | **10, High** | **Rating Average** | **Net Satisfaction** |
| Relocation Management Company | 0.0% | 1.8% | 0.9% | 1.8% | 0.9% | 3.5% | 14.0% | 19.3% | 32.5% | 25.4% | 8.38 | 49.0% |
| A Household Goods company with a "Move Management" division | 7.1% | 0.0% | 0.0% | 3.6% | 7.1% | 3.6% | 7.1% | 28.6% | 21.4% | 21.4% | 7.64 | 21.4% |
| A specialized, independent Move Management or Audit company | 20.0% | 6.7% | 0.0% | 0.0% | 6.7% | 6.7% | 20.0% | 20.0% | 0.0% | 20.0% | 6.07 | -20.1% |
| In-House administration (we order our own moves and pay the invoices) | 8.3% | 2.8% | 0.0% | 0.0% | 2.8% | 0.0% | 2.8% | 2.8% | 16.7% | 50.0% | 8.31 | 52.8% |

Satisfaction with the relocation management company scored an average of 8.38 and 49% net satisfaction. A similar outcome is satisfaction with the internal administration of the HHG program: 8.31 average score and 53% net satisfaction.

**CHANGE OF CARRIER LISTS THE PAST YEAR**

Participating companies answered the question regarding changing carriers’ lists last year.

|  |  |  |
| --- | --- | --- |
| **Over the past year did you change the mix of preferred or contracted moving services suppliers?  You can select as many of the choices below as appropriate.** | | |
| **Answer Options** | **Response Percent** | **Response Count** |
| Not an appropriate question because our move management company or relocation management company administers our program | 28.9% | 134 |
| We added one or more new moving service providers to our list | 13.8% | 64 |
| We removed one or more moving service providers from our list | 7.7% | 36 |
| No change; we use the same moving service providers as a year ago | 53.7% | 249 |
| ***Answered Question*** | | **463** |

Among the survey participants, nearly 54% did not make any supplier changes during the year and, where change did occur, more companies added a supplier than removed a supplier.

Compared to last year there a few observations:

1. The same percentage of firms, 53%, “*did not make a change; used the same firms in (2012) as they used the prior year (2011).”*
2. The percentage of companies adding a supplier is higher than the percentage dropping a supplier. This indicates the average number of carriers used by corporations for HHG shipments was slightly higher at the end of 2012 compared to the end of 2011.
3. Slightly more companies in 2012 rely on an intermediary to administer HHG than previous years.

**NUMBER OF SUPPLIERS ON CORPORATIONS “PREFERRED LIST” OF SUPPLIERS**

Regardless of whether a corporation has a contract the company might request the intermediary use specific suppliers in transfers or assignments. This “preferred list” might change from year to year (see above question) and the number of carriers on the preferred list might change.

|  |  |  |
| --- | --- | --- |
| **How many moving service providers are on your preferred list?** | | |
| **Answer Options** | **Response Percent** | **Response Count** |
| 1 | 18.7% | 86 |
| 2 | 24.1% | 111 |
| 3 | 22.7% | 105 |
| 4 | 5.9% | 27 |
| 5 or more | 4.7% | 22 |
| No list of preferred suppliers; our intermediary selects firm(s) | 23.8% | 110 |
| ***Answered Question*** | | **461** |

This year, the number of companies using only 1 HHG supplier dropped from 21% to 18% while the number of companies using 2 suppliers increased from 20% of companies to 24% and the number 3 suppliers increased from 14% to 23%. The percentage of companies using 4 or more decreased nearly 3% points.

The number of corporations with no preferred list decreased significantly from 31% last year to 24%% this year. The latter figure might explain, in part, why there was a reduction in the average number of suppliers per corporation: fewer companies with a preferred list and those which do have more carriers this year compared to last.

Overall, the number of HHG suppliers on the preferred lists increased slightly in 2012.

**WHO AUDITS, IF AT ALL, HHG INVOICES**

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

|  |  |  |
| --- | --- | --- |
| **Who audits your HHG invoices?** | | |
| **Answer Options** | **Response Percent** | **Response Count** |
| The HHC carrier alone audits invoices | 7.3% | 34 |
| The RMC alone audits invoices | 41.1% | 190 |
| An independent organization company (not the RMC) audits invoices | 21.9% | 101 |
| An internal staff audits invoices | 20.5% | 95 |
| No audit is performed | 9.3% | 43 |
| ***Answered Question*** | | **463** |

There is a wide array of options on auditing the HHG invoice and more than four in ten rely on the services of the relocation management company to perform this role. Another 22% use the services of another external intermediary.

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

**FINANCIAL BENEFIT FROM AUDITS**

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

|  |  |  |
| --- | --- | --- |
| **Do you realize financial benefits from the audit process; that is, money saved for the expense incurred?** | | |
| **Answer Options** | **Response Percent** | **Response Count** |
| No audit is done OR do not know if there is a financial benefit | 28.7% | 117 |
| Yes, there is a financial benefit | 46.0% | 187 |
| No, there is no financial benefit | 25.3% | 103 |
| ***Answered Question*** | | **407** |

Nearly one-half of survey participants believe there is financial benefit from auditing invoices.

The percentage of companies indicating there is *no financial benefit from the audit* increased from 14% in 2011 to 25% in this 2012 survey.

MOVING SERVICE SUPPLIERS

**SUPPLIERS’ SURVEYS & NUMBER OF EVALUATIONS**

The survey results indicate most responding corporate relocation managers allocate their domestic USA household goods business among multiple carriers. Also, among the corporations without a preferred list multiple carriers usually handle the companies’ volume of household goods shipments.

For these reasons, the 467 managers participating in this survey submitted 851 evaluations on suppliers. This is the most evaluations received in this annual survey.

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

|  |  |  |
| --- | --- | --- |
|  | Survey | Companies |
| Supplier | Share | Evaluating |
| United Van Lines | 23% | *192* |
| Atlas Van Lines | 18% | *156* |
| Graebel Company | 12% | *98* |
| Allied Worldwide | 11% | *96* |
| NorthAmerican | 7% | *62* |
| Budd Van Lines | 7% | *57* |
| New World Van Lines | 5% | *40* |
| Arpin Van Lines | 4% | *33* |
| Mayflower | 3% | *25* |
| Clark & Reid | 2% | *13* |
| Wheaton (incl. Bekins) | 1% | *10* |
| A. Arnold | 1% | *6* |
| Crown Van Lines | 1% | *5* |
| All Other Carriers | 7% | *58* |
|  | 100% | *851* |

The largest share of survey evaluations is United Van Lines – 23% of the corporations in this survey evaluated the services of a United agent.

MEASURING PERFORMANCE

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. This is the same segmentation used last year. All suppliers with 4 or fewer surveys are in the *All 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 60% or higher represent excellence.

**OVERALL SATISFACTION**

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

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | Scores > | | |  |  |  |  |  |  |  | # of |  | Top | Bottom | Net |
|  | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* | Surveys | Aver. | Block % | Block % | Satis. % |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| A. Arnold | 0 | 0 | 0 | 0 | 0 | 2 | 1 | 3 | 0 | 0 | 6 | 7.17 | 0% | 33% | -33% |
| Allied Worldwide | 0 | 0 | 0 | 0 | 2 | 2 | 14 | 38 | 23 | 17 | 96 | 8.34 | 42% | 4% | 38% |
| Arpin Van Lines | 1 | 0 | 0 | 0 | 0 | 0 | 3 | 15 | 8 | 6 | 33 | 8.30 | 42% | 3% | 39% |
| Atlas Van Lines | 1 | 0 | 1 | 0 | 0 | 0 | 21 | 60 | 45 | 28 | 156 | 8.44 | 47% | 1% | 46% |
| Budd Van Lines | 0 | 0 | 0 | 0 | 0 | 1 | 9 | 15 | 17 | 15 | 57 | 8.63 | 56% | 2% | 54% |
| Clark & Reid | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 5 | 5 | 2 | 13 | 8.62 | 54% | 0% | 54% |
| Crown Van Lines | 0 | 0 | 0 | 0 | 0 | 2 | 2 | 1 | 0 | 0 | 5 | 6.80 | 0% | 40% | -40% |
| Graebel Company | 0 | 0 | 0 | 0 | 3 | 0 | 31 | 32 | 19 | 13 | 98 | 8.05 | 33% | 3% | 30% |
| Mayflower | 0 | 0 | 1 | 1 | 0 | 0 | 5 | 7 | 7 | 4 | 25 | 8.04 | 44% | 8% | 36% |
| New World Van Lines | 0 | 0 | 0 | 0 | 0 | 0 | 5 | 11 | 14 | 10 | 40 | 8.73 | 60% | 0% | 60% |
| NorthAmerican | 0 | 0 | 0 | 0 | 0 | 3 | 12 | 29 | 11 | 7 | 62 | 8.11 | 29% | 5% | 24% |
| United Van Lines | 0 | 0 | 0 | 0 | 0 | 2 | 17 | 57 | 77 | 39 | 192 | 8.70 | 60% | 1% | 59% |
| Wheaton (incl. Bekins) | 0 | 0 | 0 | 0 | 0 | 0 | 4 | 4 | 2 | 0 | 10 | 7.80 | 20% | 0% | 20% |
| Other not listed | 2 | 0 | 0 | 0 | 0 | 2 | 12 | 19 | 12 | 11 | 58 | 8.07 | 40% | 7% | 33% |
| HHG INDUSTRY> | 4 | 0 | 2 | 1 | 5 | 14 | 137 | 296 | 240 | 152 | 851 | 8.38 | 46% | 3% | 43% |
|  |  |  |  |  |  |  |  |  | AVERAGE SCORE | | | 8.38 |  |  |  |
|  |  |  |  |  |  |  |  |  |  | TOP BLOCK | | 46% |  |  |  |
|  |  |  |  |  |  |  |  |  | BOTTOM BLOCK | | | 3% |  |  |  |
|  |  |  |  |  |  |  |  |  | NET SATISFACTION | | | 43% |  |  |  |

The entire industry recorded comparable scores this year compared to last year: industry average rose slightly to 8.38 from 8.35, while net satisfaction decreased slightly to 43% from 44%.

The 5 firms earning the highest “**Overall satisfaction**” are:

Carrier Net Satisfaction Average Score

New World (40 surveys) 60% 8.73

United (192 surveys) 59 8.70

Budd (57 surveys) 54 8.63

Clark & Reid (13 surveys) 54 8.62

Atlas (156 surveys) 46 8.44

**INDUSTRY AVERAGE 43% 8.38**

Among the largest “agent/franchise systems” the performance metrics are:

Carrier Net Satisfaction Average Score

United (192 surveys) 64**%** 8.86

Atlas (156 surveys) 51 8.53

Allied (96 surveys) 38 8.34

Arpin (33 surveys) 39 8.30

**INDUSTRY AVERAGE 46% 8.48**

Among independent carriers (non-franchise and no agents) the highest performance metrics are:

Carrier Net Satisfaction Average Score

New World (40 surveys) 63% 8.88

Budd (57 surveys) 60 8.82

Clark & Reid (13 surveys) 54 8.77

**INDUSTRY AVERAGE 46% 8.48**

**WILLINGNESS TO RECOMMEND A SUPPLIER TO AN ASSOCIATE**

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

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | Scores > | | |  |  |  |  |  |  |  | # of |  | Top | Bottom | Net |
|  | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* | Evaluations | Aver. | Block % | Block % | Satis. % |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| A. Arnold | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 2 | 3 | 0 | 6 | 8.33 | 50% | 0% | 50% |
| Allied Worldwide | 0 | 1 | 0 | 0 | 5 | 0 | 20 | 24 | 20 | 25 | 95 | 8.31 | 47% | 6% | 41% |
| Arpin Van Lines | 0 | 0 | 0 | 0 | 0 | 1 | 6 | 12 | 7 | 7 | 33 | 8.39 | 42% | 3% | 39% |
| Atlas Van Lines | 0 | 0 | 1 | 0 | 0 | 1 | 19 | 37 | 51 | 47 | 156 | 8.76 | 63% | 1% | 62% |
| Budd Van Lines | 0 | 0 | 0 | 0 | 1 | 0 | 6 | 10 | 18 | 22 | 57 | 8.93 | 70% | 2% | 68% |
| Clark & Reid | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 3 | 4 | 6 | 13 | 9.23 | 77% | 0% | 77% |
| Crown Van Lines | 0 | 0 | 0 | 0 | 2 | 0 | 3 | 0 | 0 | 0 | 5 | 6.20 | 0% | 40% | -40% |
| Graebel Company | 0 | 0 | 0 | 0 | 4 | 1 | 34 | 26 | 17 | 16 | 98 | 8.01 | 34% | 5% | 29% |
| Mayflower | 1 | 0 | 0 | 0 | 0 | 0 | 2 | 8 | 8 | 5 | 24 | 8.38 | 54% | 4% | 50% |
| NorthAmerican | 0 | 0 | 0 | 1 | 3 | 0 | 11 | 25 | 12 | 9 | 61 | 8.10 | 34% | 7% | 28% |
| New World Van Lines | 1 | 0 | 0 | 0 | 0 | 1 | 4 | 12 | 10 | 12 | 40 | 8.53 | 55% | 5% | 50% |
| United Van Lines | 0 | 0 | 0 | 0 | 0 | 3 | 17 | 34 | 49 | 88 | 191 | 9.06 | 72% | 2% | 70% |
| Wheaton (incl. Bekins) | 0 | 0 | 0 | 0 | 0 | 0 | 5 | 4 | 1 | 0 | 10 | 7.60 | 10% | 0% | 10% |
| Other not listed | 1 | 0 | 0 | 0 | 0 | 0 | 8 | 13 | 16 | 20 | 58 | 8.71 | 62% | 2% | 60% |
| HHG INDUSTRY> | 3 | 1 | 1 | 1 | 15 | 7 | 136 | 210 | 216 | 257 | 847 | 8.59 | 56% | 3% | 53% |
|  |  |  |  |  |  |  |  |  | AVERAGE SCORE | | | 8.59 |  |  |  |
|  |  |  |  |  |  |  |  |  |  | TOP BLOCK | | 56% |  |  |  |
|  |  |  |  |  |  |  |  |  | BOTTOM BLOCK | | | 3% |  |  |  |
|  |  |  |  |  |  |  |  |  | NET SATISFACTION | | | 53% |  |  |  |

The entire industry recorded the same range of scores this year compared to last: industry average rose to 8.54 from 8.59, while net satisfaction decreased from 54% to 53%.

The top 5 firms earning high **willingness to recommend** metrics are:

Carrier Net Satisfaction Average Score

Clark & Reid (13 surveys) 77% 9.23

United (191 surveys) 70 9.06

Budd (57 surveys) 68 8.93

Atlas (156 surveys) 62% 8.76

New World (40 surveys) 50 8.53

**INDUSTRY AVERAGE 53% 8.59**

Among the largest agent/franchise systems the best performance metrics are:

Carrier Net Satisfaction Average Score

United (191 surveys) 70% 9.06

Atlas (156 surveys) 62 8.76

Allied (95 surveys) 41 8.31

Arpin (39 surveys) 39 8.39

**INDUSTRY AVERAGE 53% 8.59**

Among independent carriers the performance metrics for the 3 best performers are:

Carrier Net Satisfaction Average Score

Clark & Reid (13 surveys) 77% 9.23

Budd (57 surveys) 68 8.93

New World (40 surveys) 50 8.53

**INDUSTRY AVERAGE 53% 8.59**

**DELIVERING TRANSFEREE SATISFACTION**

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

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | Scores > | | |  |  |  |  |  |  |  | # of |  | Top | Bottom | Net |
|  | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* | Evaluations | Aver. | Block % | Block % | Satis. % |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| A. Arnold | 0 | 0 | 0 | 0 | 0 | 1 | 1 | 1 | 3 | 0 | 6 | 8.00 | 50% | 17% | 33% |
| Allied Worldwide | 0 | 0 | 0 | 1 | 2 | 2 | 23 | 20 | 33 | 15 | 96 | 8.27 | 50% | 5% | 45% |
| Arpin Van Lines | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 7 | 15 | 11 | 33 | 9.12 | 79% | 0% | 79% |
| Atlas Van Lines | 0 | 0 | 1 | 0 | 0 | 0 | 21 | 47 | 55 | 32 | 156 | 8.60 | 56% | 1% | 55% |
| Budd Van Lines | 0 | 0 | 0 | 0 | 1 | 0 | 9 | 8 | 20 | 19 | 57 | 8.81 | 68% | 2% | 67% |
| Clark & Reid | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 4 | 6 | 3 | 13 | 8.92 | 69% | 0% | 69% |
| Crown Van Lines | 0 | 0 | 0 | 0 | 1 | 1 | 2 | 1 | 0 | 0 | 5 | 6.60 | 0% | 40% | -40% |
| Graebel Company | 0 | 0 | 0 | 1 | 1 | 4 | 27 | 41 | 15 | 9 | 98 | 7.91 | 24% | 6% | 18% |
| Mayflower | 0 | 1 | 0 | 0 | 0 | 0 | 4 | 8 | 8 | 4 | 25 | 8.24 | 48% | 4% | 44% |
| NorthAmerican | 0 | 0 | 0 | 0 | 2 | 0 | 9 | 31 | 11 | 9 | 62 | 8.23 | 32% | 3% | 29% |
| New World Van Lines | 0 | 0 | 0 | 0 | 0 | 1 | 0 | 9 | 18 | 12 | 40 | 9.00 | 75% | 3% | 73% |
| United Van Lines | 0 | 0 | 0 | 0 | 0 | 1 | 18 | 33 | 79 | 60 | 191 | 8.94 | 73% | 1% | 72% |
| Wheaton (incl. Bekins) | 0 | 0 | 0 | 0 | 0 | 1 | 3 | 3 | 3 | 0 | 10 | 7.80 | 30% | 10% | 20% |
| Other not listed | 0 | 1 | 0 | 0 | 0 | 0 | 9 | 11 | 9 | 27 | 57 | 8.84 | 63% | 2% | 61% |
| HHG INDUSTRY> | 0 | 2 | 1 | 2 | 7 | 11 | 126 | 224 | 275 | 201 | 849 | 8.57 | 56% | 3% | 53% |
|  |  |  |  |  |  |  |  |  | AVERAGE SCORE | | | 8.57 |  |  |  |
|  |  |  |  |  |  |  |  |  |  | TOP BLOCK | | 56% |  |  |  |
|  |  |  |  |  |  |  |  |  | BOTTOM BLOCK | | | 3% |  |  |  |
|  |  |  |  |  |  |  |  |  | NET SATISFACTION | | | 53% |  |  |  |

The entire industry recorded slightly lower scores this year compared to last: industry average fell from 8.61 to 8.57, while net satisfaction fell slightly from 54% to 53%.

The top 5 firms earning high **delivery of transferee satisfaction** metrics are:

Carrier Net Satisfaction Average Score

Arpin Van Lines (33 surveys) 79% 9.12

New World (40 surveys) 73 9.00

United (191 surveys) 72 8.94

Clark & Reid (13 surveys) 69 8.92

Budd (57 surveys) 67 8.81

**INDUSTRY AVERAGE 53% 8.57**

Among the largest agent/franchise systems the best performance metrics are:

Carrier Net Satisfaction Average Score

Arpin Van Lines (33 surveys) 79% 9.12

United (191 surveys) 72 8.94

Atlas (156 surveys) 55 8.60

**INDUSTRY AVERAGE 53% 8.57**

Among independent carriers the performance metrics for the 3 best performers are:

Carrier Net Satisfaction Average Score

New World (40 surveys) 73% 9.00

Clark & Reid (13 surveys) 69 8.92

Budd (57 surveys) 67 8.81

**INDUSTRY AVERAGE 53% 8.57**

**ABILITY TO MEET THE TRANSFEREE’S MOVING SCHEDULE**

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

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | Scores > | | |  |  |  |  |  |  |  | # of |  | Top | Bottom | Net |
|  | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* | Surveys | Aver. | Block % | Block % | Satis. % |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| A. Arnold | 0 | 0 | 0 | 0 | 0 | 1 | 1 | 2 | 2 | 0 | 6 | 7.83 | 33% | 17% | 17% |
| Allied Worldwide | 0 | 0 | 0 | 0 | 0 | 3 | 12 | 24 | 43 | 12 | 94 | 8.52 | 59% | 3% | 55% |
| Arpin Van Lines | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 9 | 15 | 8 | 33 | 8.91 | 70% | 0% | 70% |
| Atlas Van Lines | 0 | 0 | 1 | 0 | 1 | 2 | 20 | 56 | 39 | 37 | 156 | 8.52 | 49% | 3% | 46% |
| Budd Van Lines | 0 | 0 | 0 | 0 | 0 | 0 | 6 | 9 | 24 | 18 | 57 | 8.95 | 74% | 0% | 74% |
| Clark & Reid | 0 | 0 | 0 | 0 | 0 | 0 | 2 | 5 | 4 | 2 | 13 | 8.46 | 46% | 0% | 46% |
| Crown Van Lines | 0 | 0 | 0 | 0 | 0 | 1 | 4 | 0 | 0 | 0 | 5 | 6.80 | 0% | 20% | -20% |
| Graebel Company | 0 | 0 | 1 | 0 | 0 | 1 | 22 | 33 | 25 | 15 | 97 | 8.27 | 41% | 2% | 39% |
| Mayflower | 0 | 0 | 0 | 0 | 1 | 0 | 3 | 10 | 7 | 4 | 25 | 8.36 | 44% | 4% | 40% |
| NorthAmerican | 0 | 0 | 0 | 0 | 0 | 0 | 14 | 23 | 15 | 10 | 62 | 8.34 | 40% | 0% | 40% |
| New World Van Lines | 0 | 0 | 0 | 0 | 0 | 1 | 5 | 10 | 13 | 11 | 40 | 8.70 | 60% | 3% | 58% |
| United Van Lines | 0 | 0 | 1 | 0 | 0 | 1 | 14 | 29 | 93 | 53 | 191 | 8.93 | 76% | 1% | 75% |
| Wheaton (incl. Bekins) | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 5 | 5 | 0 | 10 | 8.50 | 50% | 0% | 50% |
| Other not listed | 0 | 0 | 0 | 0 | 1 | 0 | 6 | 21 | 12 | 18 | 58 | 8.67 | 52% | 2% | 50% |
| HHG INDUSTRY> | 0 | 0 | 3 | 0 | 3 | 10 | 110 | 236 | 297 | 188 | 847 | 8.61 | 57% | 2% | 55% |
|  |  |  |  |  |  |  |  |  | AVERAGE SCORE | | | 8.61 |  |  |  |
|  |  |  |  |  |  |  |  |  |  | TOP BLOCK | | 57% |  |  |  |
|  |  |  |  |  |  |  |  |  | BOTTOM BLOCK | | | 2% |  |  |  |
|  |  |  |  |  |  |  |  |  | NET SATISFACTION | | | 55% |  |  |  |

The industry outcomes were significantly lower this year than the prior survey as the average score fell from 8.86 to 8.61 and net satisfaction fell to 66% from the prior year 55%.

The top 5 firms earning high **meeting the transferee moving schedule** metrics are:

Carrier Net Satisfaction Average Score

Budd (57 surveys) 74% 8.95

United (191 surveys) 75 8.93

Arpin Van Lines (33 surveys) 70 9.12

New World (40 surveys) 58 8.70

Allied (94 surveys) 55 8.52

**INDUSTRY AVERAGE 55% 8.61**

Among the largest “agent/franchise systems” the best performance metrics are:

Carrier Net Satisfaction Average Score

United (191 surveys) 75% 8.93

Arpin Van Lines (33 surveys.) 70 9.12

Allied (156 surveys) 55 8.52

**INDUSTRY AVERAGE 55% 8.61**

Among independent carriers the performance metrics for the 3 best performers are:

Carrier Net Satisfaction Average Score

Budd (57 surveys) 74% 8.95

New World (40 surveys) 58 8.70

Clark & Reid (13 surveys) 46 8.46

**INDUSTRY AVERAGE 55% 8.61**

**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.

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | Scores > | | |  |  |  |  |  |  |  | # of |  | Top | Bottom | Net |
|  | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* | Surveys | Aver. | Block % | Block % | Satis. % |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| A. Arnold | 0 | 0 | 0 | 0 | 0 | 0 | 4 | 1 | 1 | 0 | 6 | 7.50 | 17% | 0% | 17% |
| Allied Worldwide | 0 | 0 | 0 | 0 | 0 | 2 | 16 | 18 | 35 | 25 | 96 | 8.68 | 63% | 2% | 60% |
| Arpin Van Lines | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 6 | 18 | 9 | 33 | 9.09 | 82% | 0% | 82% |
| Atlas Van Lines | 0 | 0 | 0 | 0 | 0 | 2 | 12 | 25 | 49 | 68 | 156 | 9.08 | 75% | 1% | 74% |
| Budd Van Lines | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 2 | 22 | 30 | 55 | 9.47 | 95% | 0% | 95% |
| Clark & Reid | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 2 | 2 | 9 | 13 | 9.54 | 85% | 0% | 85% |
| Crown Van Lines | 0 | 0 | 0 | 0 | 0 | 2 | 0 | 2 | 1 | 0 | 5 | 7.40 | 20% | 40% | -20% |
| Graebel Company | 0 | 0 | 0 | 0 | 1 | 0 | 13 | 31 | 30 | 23 | 98 | 8.61 | 54% | 1% | 53% |
| Mayflower | 0 | 0 | 1 | 0 | 0 | 0 | 2 | 6 | 10 | 6 | 25 | 8.60 | 64% | 4% | 60% |
| NorthAmerican | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 11 | 26 | 24 | 62 | 9.18 | 81% | 0% | 81% |
| New World Van Lines | 0 | 0 | 0 | 0 | 0 | 0 | 2 | 4 | 9 | 25 | 40 | 9.43 | 85% | 0% | 85% |
| United Van Lines | 0 | 0 | 0 | 0 | 0 | 0 | 10 | 19 | 79 | 84 | 192 | 9.23 | 85% | 0% | 85% |
| Wheaton (incl. Bekins) | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 2 | 6 | 2 | 10 | 9.00 | 80% | 0% | 80% |
| Other not listed | 0 | 0 | 0 | 1 | 0 | 0 | 4 | 14 | 29 | 10 | 58 | 8.71 | 67% | 2% | 66% |
| HHG INDUSTRY> | 0 | 0 | 1 | 1 | 1 | 6 | 65 | 143 | 317 | 315 | 849 | 9.01 | 74% | 1% | 73% |
|  |  |  |  |  |  |  |  |  | AVERAGE SCORE | | | 9.01 |  |  |  |
|  |  |  |  |  |  |  |  |  |  | TOP BLOCK | | 74% |  |  |  |
|  |  |  |  |  |  |  |  |  | BOTTOM BLOCK | | | 1% |  |  |  |
|  |  |  |  |  |  |  |  |  | NET SATISFACTION | | | 73% |  |  |  |

The industry outcomes were slightly higher this year than the prior survey; both metrics improved.

The top 5 firms earning high **integrity & trustworthiness** metrics are:

Carrier Net Satisfaction Average Score

Budd (55 surveys) 95% 9.47

Clark & Reid (13 surveys) 85 9.54

New World (40 surveys) 85 9.43

United (192 surveys) 85 9.23

NorthAmerican (62 surveys) 81 9.18

**INDUSTRY AVERAGE 73% 9.01**

Among the largest agent/franchise systems the best performance metrics are:

Carrier Net Satisfaction Average Score

United (192 surveys) 85 9.23

NorthAmerican (62 surveys) 81 9.18

Arpin Van Lines (33 surveys) 82 9.09

Atlas (156 surveys) 74 9.08

Allied (96 surveys) 60 8.68

**INDUSTRY AVERAGE 55% 8.61**

Among independent carriers the performance metrics for the 3 best performers are:

Carrier Net Satisfaction Average Score

Budd (55 surveys) 95% 9.47

Clark & Reid (13 surveys) 85% 9.54

New World (40 surveys) 85 9.43

**INDUSTRY AVERAGE 55% 8.61**

**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.

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | Scores > | | |  |  |  |  |  |  |  | # of |  | Top | Bottom | Net |
|  | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* | Surveys | Aver. | Block % | Block % | Satis. % |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| A. Arnold | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 1 | 3 | 0 | 5 | 8.40 | 60% | 0% | 60% |
| Allied Worldwide | 0 | 0 | 0 | 0 | 3 | 3 | 15 | 34 | 24 | 17 | 96 | 8.29 | 43% | 6% | 36% |
| Arpin Van Lines | 0 | 0 | 0 | 0 | 0 | 0 | 4 | 9 | 12 | 8 | 33 | 8.73 | 61% | 0% | 61% |
| Atlas Van Lines | 0 | 0 | 0 | 1 | 1 | 2 | 23 | 51 | 42 | 36 | 156 | 8.51 | 50% | 3% | 47% |
| Budd Van Lines | 0 | 0 | 0 | 0 | 0 | 1 | 4 | 18 | 12 | 21 | 56 | 8.86 | 59% | 2% | 57% |
| Clark & Reid | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 4 | 3 | 6 | 13 | 9.15 | 69% | 0% | 69% |
| Crown Van Lines | 0 | 0 | 0 | 0 | 0 | 2 | 1 | 1 | 0 | 0 | 4 | 6.75 | 0% | 50% | -50% |
| Graebel Company | 0 | 0 | 0 | 0 | 3 | 3 | 18 | 40 | 17 | 16 | 97 | 8.16 | 34% | 6% | 28% |
| Mayflower | 0 | 0 | 1 | 0 | 0 | 0 | 4 | 11 | 6 | 3 | 25 | 8.12 | 36% | 4% | 32% |
| NorthAmerican | 0 | 0 | 0 | 0 | 2 | 1 | 11 | 22 | 17 | 8 | 61 | 8.23 | 41% | 5% | 36% |
| New World Van Lines | 0 | 0 | 0 | 0 | 0 | 1 | 5 | 9 | 10 | 15 | 40 | 8.83 | 63% | 3% | 60% |
| United Van Lines | 0 | 0 | 0 | 0 | 0 | 3 | 24 | 52 | 61 | 51 | 191 | 8.70 | 59% | 2% | 57% |
| Wheaton (incl. Bekins) | 0 | 0 | 0 | 0 | 0 | 0 | 4 | 4 | 2 | 0 | 10 | 7.80 | 20% | 0% | 20% |
| Other not listed | 0 | 0 | 0 | 1 | 0 | 1 | 8 | 13 | 20 | 15 | 58 | 8.62 | 60% | 3% | 57% |
| HHG INDUSTRY> | 0 | 0 | 1 | 2 | 9 | 17 | 122 | 269 | 229 | 196 | 845 | 8.50 | 50% | 3% | 47% |
|  |  |  |  |  |  |  |  |  | AVERAGE SCORE | | | 8.50 |  |  |  |
|  |  |  |  |  |  |  |  |  |  | TOP BLOCK | | 50% |  |  |  |
|  |  |  |  |  |  |  |  |  | BOTTOM BLOCK | | | 3% |  |  |  |
|  |  |  |  |  |  |  |  |  | NET SATISFACTION | | | 47% |  |  |  |

The industry outcomes are lower this year than the prior survey. The average score fell to 8.50 from 8.77 and net satisfaction fell to 47% from 61%.

Among all carriers the top 5 performers on the **claims resolution** attribute are:

Carrier Net Satisfaction Average Score

Clark & Reid (13 surveys) 69% 9.15

Arpin Van Lines (33 surveys) 61 8.73

New World (40 surveys) 60 8.83

Budd (56 surveys) 57 8.86

United (191 surveys) 57 8.70

**INDUSTRY AVERAGE 47% 8.50**

Among the 3 largest “agent/franchise systems the best performance metrics are:

Carrier Net Satisfaction Average Score

Arpin Van Lines (33 surveys) 61% 8.73

United (191 surveys) 57 8.70

Atlas (156 surveys) 47 8.51

**INDUSTRY AVERAGE 47% 8.50**

Among independent carriers the performance metrics for the 3 best performers are:

Carrier Net Satisfaction Average Score

Clark & Reid (13 surveys) 69% 9.15

New World (40 surveys) 60 8.83

Budd (56 surveys) 57 8.86

**INDUSTRY AVERAGE 47% 8.50**

**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.

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | Scores > | | |  |  |  |  |  |  |  | # of |  | Top | Bottom | Net |
|  | *1* | *2* | *3* | *4* | *5* | *6* | *7* | *8* | *9* | *10* | Surveys | Aver. | Block % | Block % | Satis. % |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| A. Arnold | 0 | 0 | 0 | 0 | 0 | 0 | 3 | 1 | 2 | 0 | 6 | 7.83 | 33% | 0% | 33% |
| Allied Worldwide | 0 | 0 | 0 | 0 | 1 | 6 | 14 | 37 | 24 | 14 | 96 | 8.24 | 40% | 7% | 32% |
| Arpin Van Lines | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 5 | 19 | 9 | 33 | 9.12 | 85% | 0% | 85% |
| Atlas Van Lines | 0 | 0 | 0 | 1 | 0 | 4 | 28 | 47 | 45 | 31 | 156 | 8.43 | 49% | 3% | 46% |
| Budd Van Lines | 0 | 0 | 0 | 1 | 0 | 0 | 8 | 13 | 15 | 20 | 57 | 8.75 | 61% | 2% | 60% |
| Clark & Reid | 0 | 0 | 0 | 0 | 0 | 0 | 2 | 2 | 6 | 3 | 13 | 8.77 | 69% | 0% | 69% |
| Crown Van Lines | 0 | 0 | 0 | 0 | 0 | 2 | 2 | 1 | 0 | 0 | 5 | 6.80 | 0% | 40% | -40% |
| Graebel Company | 0 | 0 | 0 | 0 | 1 | 2 | 26 | 35 | 22 | 12 | 98 | 8.13 | 35% | 3% | 32% |
| Mayflower | 1 | 0 | 0 | 0 | 0 | 0 | 4 | 13 | 5 | 2 | 25 | 7.92 | 28% | 4% | 24% |
| NorthAmerican | 0 | 0 | 0 | 0 | 1 | 2 | 16 | 21 | 10 | 12 | 62 | 8.18 | 35% | 5% | 31% |
| New World Van Lines | 0 | 0 | 0 | 0 | 0 | 1 | 4 | 9 | 11 | 15 | 40 | 8.88 | 65% | 3% | 63% |
| United Van Lines | 0 | 0 | 0 | 0 | 0 | 1 | 19 | 67 | 56 | 48 | 191 | 8.69 | 54% | 1% | 54% |
| Wheaton (incl. Bekins) | 0 | 0 | 0 | 0 | 0 | 0 | 3 | 1 | 4 | 2 | 10 | 8.50 | 60% | 0% | 60% |
| Other not listed | 0 | 0 | 0 | 1 | 0 | 0 | 6 | 14 | 18 | 19 | 58 | 8.79 | 64% | 2% | 62% |
| HHG INDUSTRY> | 1 | 0 | 0 | 3 | 3 | 18 | 135 | 266 | 237 | 187 | 850 | 8.48 | 50% | 3% | 47% |
|  |  |  |  |  |  |  |  |  | AVERAGE SCORE | | | 8.48 |  |  |  |
|  |  |  |  |  |  |  |  |  |  | TOP BLOCK | | 50% |  |  |  |
|  |  |  |  |  |  |  |  |  | BOTTOM BLOCK | | | 3% |  |  |  |
|  |  |  |  |  |  |  |  |  | NET SATISFACTION | | | 47% |  |  |  |

The industry outcomes are much lower this year than the prior survey. The average score fell to 8.48 from 8.75 and net satisfaction to 47% from 60%

The top six performing carriers for “**value**” are:

Carrier Net Satisfaction Average Score

Arpin Van Lines (33 surveys) 85% 9.12

Clark & Reid (13 surveys) 69 8.77

New World (40 surveys) 63 8.88

Budd (57 surveys) 60 8.75

Wheaton (10 surveys) 60 8.50

United (191 surveys) 54 8.69

**INDUSTRY AVERAGE 47% 8.48**

Among the 3 largest agent/franchise systems the best performance metrics are:

Carrier Net Satisfaction Average Score

Arpin Van Lines (33 surveys) 85% 9.12

Wheaton (10 surveys) 60 8.50

United (191 surveys) 54 8.69

**INDUSTRY AVERAGE 47% 8.48**

Among independent carriers the performance metrics for the 3 best performers are:

Carrier Net Satisfaction Average Score

Clark & Reid (13 surveys) 69 8.77

New World (40 surveys) 63 8.88

Budd (57 surveys) 60 8.75

**INDUSTRY AVERAGE 47% 8.48**