

Relocation Manager's Survey*

#1 Rated Carrier



Top Rated 10 years in a row!!!

Relocation Manager's Survey*

★ America's #1 Carrier in Overall Satisfaction* ★

★ America's #1 Carrier in Integrity & Trust* ★

★ America's #1 Carrier in Overall Fair & Prompt Claims Resolution* ★

★ Top Block Ratings in Willingness to Recommend, Transferee Satisfaction, Value & Ability to Meet Moving Schedules* ★

The 13th Annual Relocation Manager's Survey on Household Goods Shipping by Trippel Survey & Research, LLC was published in February, 2015. The data includes carrier ratings, industry trends and policy benchmarking. Budd Van Lines was again rated the top carrier in America. For a full copy of the survey visit www.buddvanlines.com/2015TrippelReport



w w w . b u d d v a n l i n e s . c o m

**13th ANNUAL
RELOCATION MANAGERS' SURVEY®
on HOUSEHOLD GOODS SHIPMENT:
PROGRAM ADMINISTRATION, POLICY & 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.

METHODOLOGY

This is the thirteenth annual *Relocation Managers' Survey*® on Household Goods policy, administration and industry performance. Relocation managers received an email message announcing the survey. Participants did not disclose their name or employer; the only personal information was the request for an email address to provide a copy of the report. A reminder notice was sent before the survey closed.

The survey was launched January 18 and closed January 29, 2015. Of the 1,770 initial invitations sent via email 62 were hard or soft bounced. From the net 1,708 delivered survey invitations 417 survey responses were received.

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 & MARKETING LICENSE

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

The marketing license purchased by Budd Van Lines (Budd) permits Budd to use the data and report for internal and external marketing and communication to prospects and clients for a period of one year. The marketing license permits Budd to distribute the report to Budd personnel and outside stakeholders within the terms and conditions of the marketing license.

This report is copyrighted © by Trippel Survey & Research, LLC. No part of this work herein may be reproduced or used in any form or by any means without the written consent and the purchase of a marketing license from Trippel Survey & Research, LLC at alantrippel@att.net.

REPORT INDEX

	<u>Page</u>
Key Insights from survey, participant profile	2 – 3
Domestic HHG program administration	4 – 9
Internal HHG administration	10 – 11
Relocation Management Company admin.	12 – 13
Other models of HHG administration	14 – 15
Domestic HHG policy	16 – 20
HHG supplier performance	21 – 26

KEY INSIGHTS FROM SURVEY

1. 417 corporations participated in this annual survey representing a broad mix of corporations with varying domestic US relocation activity.

ADMINISTRATION OF HOUSEHOLD GOODS PROGRAMS

2. Approximately 65% of corporations have HHG contract with one or more HHG carriers. The most common number is 1 or 2 contracts.
3. Approximately 60% of corporations expect domestic shipments to go to preferred carriers.
4. Over 81% of corporations do not permit the employee to select the carrier.
5. Very few corporate managers changed preferred carriers in 2014.
6. Regarding pricing, 45% of companies continue to use the "400N" pricing model.
7. Less than 15% of corporations use "alternative" forms of household goods shipments, such as self-pack & haul. This percentage is practically the same as the past three years.
8. Nearly two-thirds of corporations audit both the pricing and policy adherence.
9. Relocation management companies continue to be the most common organization managing corporate household goods programs.
10. Companies with internally managed HHG programs score the highest in satisfaction, followed by relocation management companies and move manager/audit organizations.

HOUSEHOLD GOODS POLICY

11. Approximately 60% of corporations permit into and then out of storage.
12. Generally over 60% of corporations permit shipment of a second car if a mileage requirement is met.
13. Slightly more than 50% of corporations cap the insurance coverage but only 7% cap HHG cost exposure.
14. Although 65% of corporations strive to provide the same HHG benefits to all employees – and for the most part they are successful.
15. Most common HHG benefits include the customary: pack, crate, delivery and unload. Infrequent benefits include weekend servicing, pet shipment and delivery from temporary living facilities.

PERFORMANCE OF CARRIERS IN HHG INDUSTRY

16. United Van Lines remains the supplier represented most often in this survey followed by Atlas and Allied.
17. Among the franchise/agent carrier systems Atlas and Allied are arguably the best performers as measured by the attributes covered in the survey. Among the independent carriers surveyed Budd and New World are providing the most satisfying services over often-used independent competition.

CORPORATE PARTICIPANT PROFILE

The following chart shows the count of corporate managers participating in this survey (417) and giving their email address (only 410).

Email address (used to send you the final report).	
Answer Options	Response Count
	410
<i>answered question</i>	410
<i>skipped question</i>	7

ANTICIPATED DOMESTIC U.S. VOLUME IN 2015

The following chart shows percentage of companies indicating which domestic US volume range represents the anticipated 2015 domestic US relocation for the company.

Your anticipated domestic annual volume range (all domestic US moves) for 2015?		
Answer Options	Response Percent	Response Count
1- 50	23.6%	98
51-100	9.8%	41
101-250	19.7%	82
251-500	24.2%	101
501-1000	14.4%	60
1001-2000	7.6%	31
Over 2000	0.7%	3
<i>answered question</i>		416
<i>skipped question</i>		1

The percentage of survey participants in the lowest volume range is identical to last year's survey. Within the two lowest ranges (0-100 moves) the percentage of participants (33.4%) dropped from an abnormal high last year (44%) to an historical range – in the 32% - 35% for many years.

The highest volume ranges, over 500 domestic moves annually, represent slightly higher percentages of participants.

Overall, the chart indicates possible growth, albeit small, in 2015 compared to 2014.

PROGRAM ADMINISTRATION – ALL CORPORATIONS

CORPORATIONS CONTRACTING WITH SUPPLIERS

Does your company have contracts with one or more carriers or HHG companies?		
Answer Options	Response Percent	Response Count
Yes	65.7%	266
No	34.3%	139
<i>answered question</i>		405
<i>skipped question</i>		12

The percentage of corporations contracting with one or more HHG carriers/organizations increased to 65.7% from last year's 56%. This 2/3 contracting rate is the highest in many years.

USE OF PREFERRED HHG SUPPLIERS

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	60.4%	252
Yes, but our move management firm or relocation company has a degree of flexibility to award a move to non-preferred moving suppliers	15.3%	64
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	24.3%	101
<i>answered question</i>		417
<i>skipped question</i>		0

The percentage of corporate managers expecting all shipments to go to the contracted or preferred suppliers increased slightly to 60.4% from 57.6% last year while the degree of flexibility provided to the intermediary (relocation management company, for example) increase 1.5 percentage points to 15.3%.

Approximately one-quarter of all corporations give the intermediary complete freedom in selecting HHG carriers. This dropped nearly 4 percentage points from last year.

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

Regardless of whether a corporation has a contract the corporate manager might prefer the intermediary use specific suppliers in domestic moves.

How many moving service providers are on your preferred list?		
Answer Options	Response Percent	Response Count
0 (No list of preferred suppliers)	20.3%	83
1	23.8%	97
2	24.8%	101
3	14.7%	60
4	5.4%	22
5 or more	11.0%	45
<i>answered question</i>		408
<i>skipped question</i>		9

The percentage of corporations without preferred suppliers dropped to 20% from 25% in last year’s survey. At the opposite end of the spectrum, the percentage of corporate managers with a preferred list of 5 or more suppliers increased from 7% last year to 11% this year.

The year-to-year change indicates corporate managers are staying active using and requesting preferred carriers than recent past.

EMPLOYEE SELECTION OF CARRIERS

This is a new question in the survey: transferee involvement in carrier selection.

Does the transferee decide which carrier is used?		
Answer Options	Response Percent	Response Count
Yes, transferee MUST select a carrier from our preferred or contract carrier list	8.2%	34

Yes, transferees may select ANY carrier	6.3%	26
No, the transferee does NOT select the carrier	81.8%	338
Another option not shown above	3.6%	15
<i>answered question</i>		413
<i>skipped question</i>		4

A very large majority (nearly 82%) doesn't permit employee involvement in selecting the household goods carrier.

CHANGE OF CARRIER LISTS THE PAST YEAR

NOTE: the percentage exceeds 100% because respondents were permitted to select multiple choices; as in adding a supplier and removing a supplier.

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	24.3%	101
We added one or more new moving service providers to our list	14.4%	60
We removed one or more moving service providers from our list	12.6%	52
No change; we use the same moving service providers as a year ago	53.2%	221

Although 24% of corporations are uninvolved with supplier selection, the majority of managers who are involved with supplier selection made no change in supplier preferences.

HOW ARE HHG SHIPMENTS PRICED FOR YOUR COMPANY

Corporate managers presented a profile of household goods pricing.

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	45.0%	185
Priced based on carrier's own model or tariff	6.3%	26
Priced per move based on weight or other variables; based on negotiations with or by our relocation management company	15.3%	63
Priced based on a competitive bidding model we or our relocation management company use	9.0%	37
Single Rate Factor for moves	7.2%	30
Not too sure how our moves are priced	13.5%	56
Another basis not listed above	3.6%	15
<i>answered question</i>		412
<i>skipped question</i>		5

Slightly less than one-half of corporations continue to use the 400N tariff for pricing.

ALTERNATIVE APPROACHS TO HOUSEHOLD GOODS SHIPMENT

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

Do you anticipate using, or are you currently using, alternative approaches to HHG shipment in 2015? 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 and are not anticipating these changes in 2015	61.7%	255
Yes, we are currently providing this form of shipment as part of our transfer program	14.5%	60

Yes, we are considering this form of shipment to become an element/alternative in our program	23.7%	98
<i>answered question</i>		413
<i>skipped question</i>		4

Nearly one-quarter (23.7%) of corporate managers are evaluating this form of alternative household goods shipment. This is up from 17.6% last year. Similarly, there is a drop this year in the percentage of managers “not considering alternatives” to HHG shipment.

AUDITING – TARIFF/PRICING or POLICY

This is a new question in the 2015 survey.

Are household goods bills audited, either directly or through a third-party intermediary, for either of the two following considerations?					
Answer Options	No audit is performed	Our company audits	RMC audits	Another organization audits	Response Count
Tariff (or the contracted pricing terms)?	20.0%	15.5%	37.2%	27.3%	412
Company Household Goods policy?	16.8%	19.6%	37.3%	26.2%	401

Nearly two-thirds of corporate managers use outside service providers – either the relocation management company or another organization to audit both invoices and against policy.

ORGANIZATIONAL MANAGEMENT OF HHG

This is a new question in the 2015 survey.

Which organization manages and oversees household goods shipment activity for your company?		
Answer Options	Response Percent	Response Count
In-House administration (we order our own moves and pay the invoices)	21.6%	90
Relocation Management Company	73.1%	304
A "Move Management" division of a Household Goods Shipment organization	3.6%	15
A specialized, independent Move Management or Audit company	1.7%	7

<i>answered question</i>	416
<i>skipped question</i>	1

A high majority of corporations use the services of a relocation management company to administer the company's household goods shipment program.

PROGRAM ADMINISTRATION – INTERNAL COMPANY ADMINISTRATION
- BASED ON A SAMPLE SIZE OF 90 CORPORATIONS

OVERALL SATISFACTION

How satisfied are you with the overall performance of the internal department managing your household goods program?												
Answer Options	1, Low	2	3	4	5	6	7	8	9	10, High	Rating Average	Response Count
	0	0	0	0	3	0	12	11	12	52	9.06	90

Corporate managers are highly satisfied with the internal group's performance.

SELECTION OF CARRIER

Many processes are used internally to select carrier for shipments.

How does the internal department select a carrier?		
Answer Options	Response Percent	Response Count
The internal department must use our contracted carrier	33.7%	30
Based on lowest price	3.4%	3
Based on highest quality/satisfaction ratings	15.7%	14
Based on "equal volume" between preferred carriers	37.1%	33
Based on another selection process not identified above	10.1%	9
<i>answered question</i>		89

The two most prevalent options – “must use a contracted carrier” and “equal volume distribution” – are nearly identical in application by corporations with internally managed programs.

COLLECT REFERRAL FEE OR ESCROW PAYMENT

Does the internal department collect a referral fee or escrow payment from the HHG carrier?		
Answer Options	Response Percent	Response Count
Yes	4.5%	4

No	93.3%	83
Not sure	2.2%	2
<i>answered question</i>		89

A very high majority of corporations with internally managed programs do not collect a referral fee or other forms of income from the HHG carrier.

PROGRAM ADMINISTRATION – RELOCATION MANAGEMENT COMPANIES
- BASED ON A SAMPLE SIZE OF 304 CORPORATIONS

OVERALL SATISFACTION

How satisfied are you with the overall performance of the relocation management company managing your household goods program?

Answer Options	1, Low	2	3	4	5	6	7	8	9	10, High	Rating Average	Response Count
	0	0	0	11	7	6	54	91	71	64	8.22	304

Relocation management companies earned an 8.22 average score (36.5% net satisfaction) regarding performance managing corporate HHG programs.

The following chart indicates the degree of satisfaction corporate managers have with 7 relocation management companies' administration of HHG programs. These service providers obtained 5 or more evaluations among the 304 total sample size and are displayed in alphabetical order.

RMC	Count	Average Score
AIReS	17	7.4
Altair	36	8.4
Brookfield	7	8.0
Cartus	69	7.1
Graebel	8	9.0
SIRVA	27	8.3
Weichert	41	8.2

SELECTION OF CARRIER

Note: the following chart reflects multiple choices permitted by the survey respondents.

How does the relocation management company select a carrier? Multiple answers allowed.		
Answer Options	Response Percent	Response Count
The RMC must use our contracted carrier	39.7%	121
Based on lowest price from bids received	9.0%	27
Based on highest quality/satisfaction ratings	25.6%	78
Based on "equal volume" between preferred carriers	19.2%	58
Based on another selection process not identified above	32.1%	98

There are wide ranging methods – driven by corporate requirements - used by relocation management companies to select the carrier for a domestic move.

There are subtle differences in the above chart compared to the chart reflecting how internally managed programs select carriers: quality and price are more important factors in RMC managed programs compared to internally managed programs.

COLLECT REFERRAL FEE OR ESCROW PAYMENT

Does the relocation management company collect a referral fee or escrow payment from the HHG carrier?		
Answer Options	Response Percent	Response Count
Yes	18.4%	56
No	37.2%	113
Not sure	44.4%	135
<i>answered question</i>		304

Many corporate managers were uncertain whether or not the relocation management company collected income from the household goods carrier (in the form of a referral fee or escrow). Among the managers knowing the answer to the survey question, approximately 2-to-1 responded the RMC does not earn this form of income.

CORPORATION PAYING A FEE TO R.M.C.

Do you pay the relocation management company a fee for managing and overseeing the HHG program?		
Answer Options	Response Percent	Response Count
Yes	57.0%	173
No	43.0%	131
<i>answered question</i>		304

Slightly more than one-half of the corporations in the survey pay the relocation management company a fee for HHG administration.

PROGRAM ADMINISTRATION – MOVE MANAGERS OR AUDIT SUPPLIERS
- BASED ON A SAMPLE SIZE OF 22 CORPORATIONS

OVERALL SATISFACTION

How satisfied are you with the overall performance of the move management or audit organization managing and overseeing your household goods program?

Answer Options	1, Low	2	3	4	5	6	7	8	9	10, High	Rating Average	Response Count
	0	0	0	0	2	2	6	4	2	6	7.91	22

Overall performance of move managers or audit service firms in managing corporate HHG programs is 7.91% - the lowest satisfaction score among the alternative models.

SELECTION OF CARRIER INTERNALLY

How does the move management or audit company select a carrier?		
Answer Options	Response Percent	Response Count
They must use our contracted carrier	31.8%	7
Based on lowest price from bids received	0.0%	0
Based on highest quality/satisfaction ratings	18.2%	4
Based on "equal volume" between preferred carriers	0.0%	0
Based on another selection process not identified above	50.0%	11
<i>answered question</i>		22

There is no common approach provided toward HHG carrier selection by these intermediaries.

COLLECT REFERRAL FEE OR ESCROW PAYMENT

Does the move management company or audit company collect a referral fee or escrow payment from the HHG carrier?		
Answer Options	Response Percent	Response Count
Yes	36.4%	8

No	54.5%	12
Not sure	9.1%	2
<i>answered question</i>		22

As the situation with RMCs, most corporations do not believe the move management or audit firm is collecting a referral fee.

CORPORATION PAYING A FEE TO THE MOVE MANAGER OR AUDIT FIRM

Do you pay the move management company or audit company a fee for managing and overseeing the HHG program?		
Answer Options	Response Percent	Response Count
Yes	65.0%	13
No	35.0%	7
<i>answered question</i>		20

Nearly two-thirds of corporations are paying a fee to the move management or audit firm.

HOUSEHOLD GOODS POLICY

NUMBER OF HHG SHIPMENT PERMITTED

Typical corporate policy stipulates the number and pattern of shipments permitted.

How many household goods shipments are covered by policy?		
Answer Options	Response Percent	Response Count
1 move: old location to new location only	38.4%	160
2 moves: old location to storage (if permitted) and to new location	60.9%	254
Another answer not above	0.2%	1
Not stated in policy	0.5%	2
<i>answered question</i>		417
<i>skipped question</i>		0

These percentages are nearly identical as the outcomes in the 2014 survey. A large majority of corporations permit household goods to be shipped into and out of storage to the new home.

CAR SHIPMENTS

Car shipments vary among corporate policy as a function of organizational position.

For each organizational level shown how many cars can be shipped? Assume any minimum mileage requirement your policy requires is exceeded.					
Answer Options	One car	Two cars	One car for each driver in the family	Another answer not above	Response Count
Executives	21.5%	64.5%	4.7%	9.3%	417
Senior Managers	24.5%	64.2%	2.8%	8.5%	414
Managers	25.5%	63.2%	2.8%	8.5%	403
Professional	26.9%	60.6%	2.9%	9.6%	405
Exempt level (not above)	32.0%	54.0%	2.0%	12.0%	374
Non exempt	26.9%	41.0%	1.3%	30.8%	293

Experience new hire	27.7%	52.1%	2.1%	18.1%	357
Inexperienced new hire	23.5%	42.0%	1.2%	33.3%	308

Policy permits the shipment – generally – of two cars. The “two-car” policy percentage is consistent with last year’s survey.

HHG STORAGE DURATION

If permitted by policy and conditions are met what is the maximum duration of HHG storage?		
Answer Options	Response Percent	Response Count
No storage is permitted	5.8%	24
Yes, however policy does not set duration limitation	3.6%	15
Yes, up to 30 days	40.1%	166
Yes, up to 45 days	1.4%	6
Yes, up to 60 days	40.3%	167
Yes, up to 90 days	7.2%	30
Yes, duration is beyond 90 days	0.0%	0
Another duration not noted above	1.4%	6
<i>answered question</i>		414
<i>skipped question</i>		3

When storage is permitted the typical duration is limited to either 30 days or 60 days.

DOLLAR CAP OR MAXIMUM - INSURANCE

There are many options for insuring the HHG shipment and different levels of insurance limits.

Do you have a maximum amount for HHG insurance for a shipment?		
Answer Options	Response Percent	Response Count
No	54.5%	224

Yes	45.5%	187
<i>answered question</i>		411

Nearly one-half the participating corporations cap HHG insurance.

DOLLAR CAP OR MAXIMUM – COST TO SHIP HOUSEHOLD GOODS

Are there caps or maximum dollars spent on an HHG shipment?

Do you have a dollar cap (maximum) on HHG expense for any grade level(s) or organizational level(s)?		
Answer Options	Response Percent	Response Count
No	93.2%	385
Yes	6.8%	28
<i>answered question</i>		413

Very few corporations cap HHG expense exposure.

COMMON FEATURES AMONG CORPORATE HHG POLICY

Corporations might or might not include certain features in the 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	Response Count
Packing (and packing materials)	82.4%	16.7%	0.9%	413
Crating and Uncrating	77.8%	19.4%	2.8%	413
Normal appliance servicing	76.4%	17.9%	5.7%	401
Loading, Delivery and Unloading	84.1%	15.9%	0.0%	413
Unpacking services	61.0%	21.9%	18.1%	397
Removal of debris upon completion of move	75.0%	19.4%	5.6%	413

Loading or unloading on weekend or holiday	15.8%	33.7%	51.5%	395
Pickup or delivery from storage to new home	53.8%	27.4%	19.8%	402
Pickup or delivery from temporary living location to new home	25.5%	21.6%	52.9%	387
Transportation of pets	27.0%	14.0%	59.0%	398
Transportation of more than 1 car	51.4%	33.3%	15.2%	411

There is commonality between corporations on what HHG activities are provided by policy and which employees, if any, receive those benefits.

PHILOSOPHICAL APPROACH TO POLICY DESIGN

As a general guideline which of the following approaches do you use for providing HHG benefits to employees in a domestic US move? You may select multiple answers closest to your business model.

Answer Options	Response Percent	Response Count
All employees receive the same HHG benefits	64.9%	269
Benefits are on a 'sliding scale': higher organizational levels more, lower organizational levels fewer HHG benefits	25.6%	114
New hires generally receive fewer HHG benefits than current employees	8.4%	43
Homeowners receive more HHG benefits than renters	22.1%	99
Transferees with a family receive more HHG benefits than single transferees	2.7%	22

Nearly two-thirds of corporations strive to offer the same HHG benefits to all employees.

FREQUENCY OF 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 similar to the outcomes generated in last year's survey.

MOVING SERVICE SUPPLIERS' PERFORMANCE

SUPPLIERS' PERFORMANCE & SHARE OF EVALUATIONS

This year's survey shows 417 corporate managers submitted 682 evaluations of HHG carriers/agents. This indicates each corporation participant evaluated 1.64 carriers – a decrease from last year's rate of 2.05.

Due to the mix of participating companies and the carriers used for HHG services many carriers had a very few evaluations submitted by corporate relocation managers. The charts on the following pages show the firms with 20 or more evaluations submitted in the survey. All suppliers with 19 or fewer surveys are in the *All Other* category.

Two metrics are used throughout the report. Using a 10-point scale (10 high) the primary reporting metric is **Average Score**. The other metric is "**Net Satisfaction**" which is the percentage of scores of 10 and 9 ("top block") 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 generate the following outcomes regarding Overall satisfaction.

	Scores >										Count	Aver.	Top Block %	Bottom Block %	Net Satis. %	
	1	2	3	4	5	6	7	8	9	10						
Allied Worldwide			1		1	1	10	25	17	21	76	8.51	50%	4%	46%	
Arpin Van Lines					1		6	7	5	3	22	8.09	36%	5%	32%	
Atlas Van Lines					1	1	17	28	32	39	118	8.75	60%	2%	58%	
Budd Van Lines					1		4	14	24	11	54	8.72	65%	2%	63%	
Graebel Company			1	1	1	3	9	16	20	0	51	7.86	39%	12%	27%	
Mayflower					1		4	8	6	6	25	8.44	48%	4%	44%	
New World Van Lines					2	1	9	12	13	14	51	8.47	53%	6%	47%	
NorthAmerican					1	1	3	15	14	5	39	8.41	49%	5%	44%	
United Van Lines			1	0	5	2	41	40	33	35	157	8.24	43%	5%	38%	
Wheaton					1		6	8	8	7	30	8.43	50%	3%	47%	
Other not listed	1				1	1	7	12	22	15	59	8.56	63%	5%	58%	
HHG INDUSTRY>	1	0	3	1	16	10	116	185	194	156	682	8.43	51%	5%	47%	
AVERAGE SCORE												8.43				
TOP BLOCK												51%				
BOTTOM BLOCK												5%				
NET SATISFACTION												47%				

The entire industry recorded slightly lower scores this year for **Overall Satisfaction** compared to last year. The industry average decreased to 8.43 from 8.45 while net satisfaction decreased to 47% from 49%.

No carrier achieved excellence. The three carriers earning the highest average score are Atlas followed by Budd Van Lines and Allied.

Among the largest agent/franchise systems the performance metrics Atlas earned the highest scores followed by Allied then Mayflower. Among independent carriers (non-franchise and no agents) Budd outperformed New World.

WILLINGNESS TO RECOMMEND A SUPPLIER TO AN ASSOCIATE

Nearly all survey respondents evaluate their willingness to recommend carriers to others in the relocation industry.

	Scores >										Count	Aver.	Top Block %	Bottom Block %	Net Satis. %	
	1	2	3	4	5	6	7	8	9	10						
Allied Worldwide			1	3	2	2	19	23	14	11	75	7.87	33%	11%	23%	
Arpin Van Lines					1	1	6	6	4	3	21	7.95	33%	10%	24%	
Atlas Van Lines					2	1	24	27	26	37	117	8.58	54%	3%	51%	
Budd Van Lines					1	1	7	15	15	16	55	8.64	56%	4%	53%	
Graebel Company		1			3	1	12	17	9	7	50	7.88	32%	10%	22%	
Mayflower					1		7	7	6	3	24	8.08	38%	4%	33%	
New World Van Lines					1		7	7	14	9	38	8.58	61%	3%	58%	
NorthAmerican					3	2	11	13	12	9	50	8.12	42%	10%	32%	
United Van Lines			1	1	3	1	36	45	38	31	156	8.28	44%	4%	40%	
Wheaton					1	0	12	8	5	3	29	7.86	28%	3%	24%	
Other not listed			1	1	1	0	14	7	21	13	58	8.36	59%	5%	53%	
HHG INDUSTRY>	0	1	3	5	19	9	155	175	164	142	673	8.26	45%	5%	40%	
AVERAGE SCORE												8.26				
TOP BLOCK												45%				
BOTTOM BLOCK												5%				
NET SATISFACTION												40%				

The entire industry recorded lower scores this year for **Willingness to Recommend** compared to last year. The industry average decreased to 8.26 from 8.50 while net satisfaction decreased to 40% from 50%.

No carrier achieved excellence. The three carriers earning the highest average score are **Budd Van Lines** followed by New World Van Lines and Atlas. However, New World earned the highest net satisfaction.

Among the largest agent/franchise systems Atlas earned the highest scores followed by United. These were the only 2 agent/franchise organizations above industry average.

Among independent carriers (non-franchise and no agents) Budd outperformed New World and both are above the industry average.

PROVIDING TRANSFEREE SATISFACTION

Corporate managers evaluate their perception of maximizing transferee satisfaction.

	Scores >										Count	Aver.	Top Block %	Bottom Block %	Net Satis. %
	1	2	3	4	5	6	7	8	9	10					
Allied Worldwide	1				1	4	27	22	7	14	76	7.88	28%	8%	20%
Arpin Van Lines					1	1	10	7		3	22	7.59	14%	9%	5%
Atlas Van Lines					1		26	27	35	27	116	8.52	53%	1%	53%
Budd Van Lines					1	2	8	15	17	12	55	8.47	53%	5%	47%
Graebel Company			1	1	1	1	19	17	10		49	7.63	20%	6%	14%
Mayflower					1	2	5	11	6	2	27	7.93	30%	11%	19%

New World Van Lines			1	1		6	10	14	7	39	8.38	54%	5%	49%	
NorthAmerican			1	2	1	9	18	16	4	51	8.06	39%	8%	31%	
United Van Lines		2	1	2	3	41	48	32	28	157	8.13	38%	5%	33%	
Wheaton					1	6	13	7	3	30	8.13	33%	3%	30%	
Other not listed	1				1	2	14	14	15	12	59	8.20	46%	7%	39%
HHG INDUSTRY>	0	1	2	4	12	14	157	188	144	100	622	8.15	39%	5%	34%
											AVERAGE SCORE	8.15			
											TOP BLOCK	39%			
											BOTTOM BLOCK	5%			
											NET SATISFACTION	34%			

The industry recorded lower scores this year for **Transferee Satisfaction** compared to last year. The industry average decreased to 8.15 from 8.37 while net satisfaction decreased to 34% from 44%.

No carrier achieved excellence. The three carriers earning the highest average score are Atlas followed by **Budd Van Lines** and New World Van Lines. These were the only 3 carriers above the industry average.

ABILITY TO MEET THE TRANSFEREES' MOVING SCHEDULE

Meeting the transferees' schedule is a very important to transferees.

	Scores >										Count	Aver.	Top Block %	Bottom Block %	Net Satis. %
	1	2	3	4	5	6	7	8	9	10					
Allied Worldwide					1		31	21	10	13	76	8.03	30%	1%	29%
Arpin Van Lines					1		4	8	7	2	22	8.18	41%	5%	36%
Atlas Van Lines		1			1		19	31	29	37	118	8.64	56%	2%	54%
Budd Van Lines					1		8	17	14	14	54	8.57	52%	2%	50%
Graebel Company			1		2		17	14	10	7	51	7.92	33%	6%	27%
Mayflower					1		2	4	11	7	25	8.80	72%	4%	68%
New World Van Lines					2		7	7	16	7	39	8.44	44%	5%	38%
NorthAmerican					2		14	18	9	8	51	8.10	45%	4%	41%
United Van Lines			1		2	1	48	41	42	21	156	8.15	40%	3%	38%
Wheaton					1		9	15	3	2	30	7.83	17%	3%	13%
Other not listed		1		1		2	17	19	12	7	59	7.92	32%	7%	25%
HHG INDUSTRY>	0	2	2	1	14	3	176	195	163	125	681	8.24	42%	3%	39%
											AVERAGE SCORE	8.24			
											TOP BLOCK	42%			
											BOTTOM BLOCK	3%			
											NET SATISFACTION	39%			

The entire industry recorded lower scores this year for **Meeting the Transferees' Moving Schedule** compared to last year. The industry average decreased to 8.24 from 8.59 while net satisfaction decreased to 39% from 54%.

No carrier achieved excellence. The three carriers earning the highest average score are Mayflower followed by Atlas and **Budd Van Lines**.

Among the largest agent/franchise systems Mayflower earned the highest scores followed by Atlas; both were the only firms above industry average.

Among independent carriers (non-franchise and no agents) Budd outperformed New World. Both were above the industry average.

SATISFACTION WITH INTEGRITY AND TRUSTWORTHINESS OF SUPPLIERS

This attribute is an extremely high need among corporate relocation managers.

	Scores >										Count	Aver.	Top Block %	Bottom Block %	Net Satis. %	
	1	2	3	4	5	6	7	8	9	10						
Allied Worldwide					2	1	19	19	7	28	76	8.47	46%	4%	42%	
Arpin Van Lines					1		3	7	1	10	22	8.68	50%	5%	45%	
Atlas Van Lines					1		17	21	14	65	118	9.05	67%	1%	66%	
Budd Van Lines					1		3	11	21	18	54	8.94	72%	2%	70%	
Graebel Company				1	1		11	8	18	12	51	8.47	59%	4%	55%	
Mayflower				1			4	3	3	14	25	8.96	68%	4%	64%	
New World Van Lines					1			9	13	16	39	9.08	74%	3%	72%	
NorthAmerican					2	1	7	12	17	12	51	8.51	57%	6%	51%	
United Van Lines			1	2			2	30	24	45	157	8.66	62%	3%	59%	
Wheaton						1		10	9	3	30	8.13	33%	3%	30%	
Other not listed		1					1	11	7	14	25	8.76	66%	3%	63%	
HHG INDUSTRY>	0	1	1	3	11	5	115	130	156	260	682	8.73	61%	3%	58%	
AVERAGE SCORE												8.73				
TOP BLOCK												61%				
BOTTOM BLOCK												3%				
NET SATISFACTION												58%				

The entire industry recorded slightly lower scores this year for **Integrity and Trustworthiness** compared to last year. The industry average decreased to 8.73 from 8.80 while net satisfaction decreased to 58% from 63%.

Four carriers achieved excellence: Atlas, **Budd**, Mayflower and New World Van lines.

The three carriers earning the highest average score are: New World followed by Atlas and Mayflower.

SATISFACTION WITH CLAIMS RESOLUTION (FAIR, PROMPT) OF SUPPLIERS

This attribute is a high need among transferees and corporate managers.

	Scores >										Count	Aver.	Top Block %	Bottom Block %	Net Satis. %
	1	2	3	4	5	6	7	8	9	10					
Allied Worldwide			1		1	1	18	21	10	24	76	8.39	45%	4%	41%
Arpin Van Lines					1	2	2	5	9	3	22	8.27	55%	14%	41%
Atlas Van Lines					1	2	14	19	23	59	118	9.02	69%	3%	67%
Budd Van Lines					1	1	4	7	27	14	54	8.85	76%	4%	72%
Graebel Company				1	3	1	9	5	23	9	51	8.33	63%	10%	53%
Mayflower					1		3	2	8	11	25	8.96	76%	4%	72%
New World Van Lines						1	6	7	16	9	39	8.64	64%	3%	62%
NorthAmerican			1			2	5	9	10	24	51	8.82	67%	6%	61%
United Van Lines		1				3	2	28	28	49	156	8.59	60%	4%	56%

Wheaton				1		7	8	4	10	30	8.47	47%	3%	43%	
Other not listed				1		6	7	19	26	59	9.03	76%	2%	75%	
HHG INDUSTRY>	0	1	2	2	15	9	102	118	198	234	681	8.70	63%	4%	59%
	AVERAGE SCORE											8.70			
	TOP BLOCK											63%			
	BOTTOM BLOCK											4%			
	NET SATISFACTION											59%			

The entire industry recorded higher scores this year for **Claims Resolution** compared to last year. The industry average increased to 8.70 from 8.59 while net satisfaction increased to 59% from 56%.

Five carriers achieved excellence: Atlas, **Budd**, Mayflower, New World and NorthAmerican.

The three carriers earning the highest average score are Atlas followed by Mayflower and **Budd Van Lines**.

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

A consistent survey outcome among corporate participants indicates: corporations look for high value rather than low price.

	Scores >										Count	Aver.	Top Block %	Bottom Block %	Net Satis. %
	1	2	3	4	5	6	7	8	9	10					
Allied Worldwide					2		26	23	14	11	76	8.05	33%	3%	30%
Arpin Van Lines					1		9	6	3	3	22	7.86	27%	5%	23%
Atlas Van Lines				1	3		20	24	21	49	118	8.76	59%	3%	56%
Budd Van Lines					1		8	10	22	13	54	8.69	65%	2%	63%
Graebel Company			1		2		15	16	10	7	51	7.96	33%	6%	27%
Mayflower					1		3	4	10	7	25	8.72	68%	4%	64%
New World Van Lines					1		2	19	20	9	51	8.65	57%	2%	55%
NorthAmerican					2		9	14	7	7	39	8.15	36%	5%	31%
United Van Lines			1	1	2	2	24	38	31	56	155	8.65	56%	4%	52%
Wheaton					1		8	8	3	3	23	7.91	26%	4%	22%
Other not listed		1			1	1	10	7	17	28	65	8.80	69%	5%	65%
HHG INDUSTRY>	0	1	2	1	15	6	134	169	158	193	679	8.49	52%	4%	48%
	AVERAGE SCORE											8.49			
	TOP BLOCK											52%			
	BOTTOM BLOCK											4%			
	NET SATISFACTION											48%			

The entire industry recorded slightly lower scores this year for **Satisfaction with Value** compared to last year. The industry average decreased slightly to 8.49 from 8.50 while net satisfaction decreased to 48% from 51%.

Two carriers achieved excellence: **Budd** and Mayflower. The three carriers earning the highest average score are Atlas followed by Mayflower and **Budd Van Lines**. (note: this outcome illustrates how a supplier can achieve a higher average score but lower net satisfaction compared to another supplier – and vice versa).

LIKELIHOOD OF USING SAME CARRIER A YEAR FROM NOW

Repeat business is extremely important to service firms. This survey question identifies the carriers likely to retain business a year from now.

	Scores >										Count	Aver.	Top Block %	Bottom Block %	Net Satis. %
	1	2	3	4	5	6	7	8	9	10					
Allied Worldwide	0	1	3	0	1	1	21	24	10	15	76	7.91	33%	8%	25%
Arpin Van Lines	0	0	2	0	1	0	11	5	1	2	22	7.14	14%	14%	0%
Atlas Van Lines	0	1	1	0	1	1	19	17	21	57	118	8.85	66%	3%	63%
Budd Van Lines	0	0	1	0	1	0	10	12	15	15	54	8.50	56%	4%	52%
Graebel Company	2	0	1	1	1	0	23	19	2	2	51	7.16	8%	10%	-2%
Mayflower	0	0	0	0	1	0	3	2	5	14	25	9.08	76%	4%	72%
New World Van Lines	0	0	0	0	2	0	3	8	14	12	39	8.74	67%	5%	62%
NorthAmerican	0	0	1	0	2	0	11	15	13	9	51	8.18	43%	6%	37%
United Van Lines	0	0	1	1	3	0	24	29	32	67	157	8.79	63%	3%	60%
Wheaton	0	0	0	0	1	0	12	10	4	3	30	7.83	23%	3%	20%
Other not listed	1	2	1	0	0	0	13	17	12	13	59	8.02	42%	7%	36%
HHG INDUSTRY>	3	4	11	2	14	2	150	158	129	209	682	8.36	50%	5%	44%
												AVERAGE SCORE	8.36		
												TOP BLOCK	50%		
												BOTTOM BLOCK	5%		
												NET SATISFACTION	44%		

This question was not asked last year.

Four carriers achieved excellence: Atlas, Mayflower, New World and United. Mayflower earned the highest average score and net satisfaction among these carriers.