

# Relocation Manager's Survey

WINNER



2022 Trippel Report  
on Household Goods

***Top Rated in all categories:***

- ✓ ***Overall Performance***
- ✓ ***Highest Average Score***
- ✓ ***Invoice Accuracy***
- ✓ ***Issue Resolution***
- ✓ ***ESG Performance***
- ✓ ***Fair and Reasonable Pricing***

***#1 Independent Van Line in the U.S.: Budd remains the highest rated independent van line in the United States.***

**20th ANNUAL RELOCATION MANAGERS' SURVEY®  
on HOUSEHOLD GOODS SHIPMENT:  
PROGRAM ADMINISTRATION, POLICY &  
INDUSTRY & CARRIER PERFORMANCE**

**BACKGROUND**

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

**METHODOLOGY**

This is the twentieth annual *Relocation Managers' Survey®* on Household Goods policy, administration and industry-supplier performance. Corporate relocation managers received an email message announcing the survey on February 4, 2022. A reminder notice was sent and the survey closed February 11<sup>th</sup>.

Of the 968 initial invitations sent via SurveyMonkey 7 were hard or soft bounced and 3 opted out. Among the remaining invitations 128 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**

This report is copyrighted © by Trippel Survey & Research, LLC 2020. Trippel Survey & Research, LLC maintains strict confidentiality of corporate participants.

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**DISCLAIMER**

Since the last survey on this topic one year ago no household goods corporation engaged Trippel Survey & Research in consulting or research assignments or survey programs.

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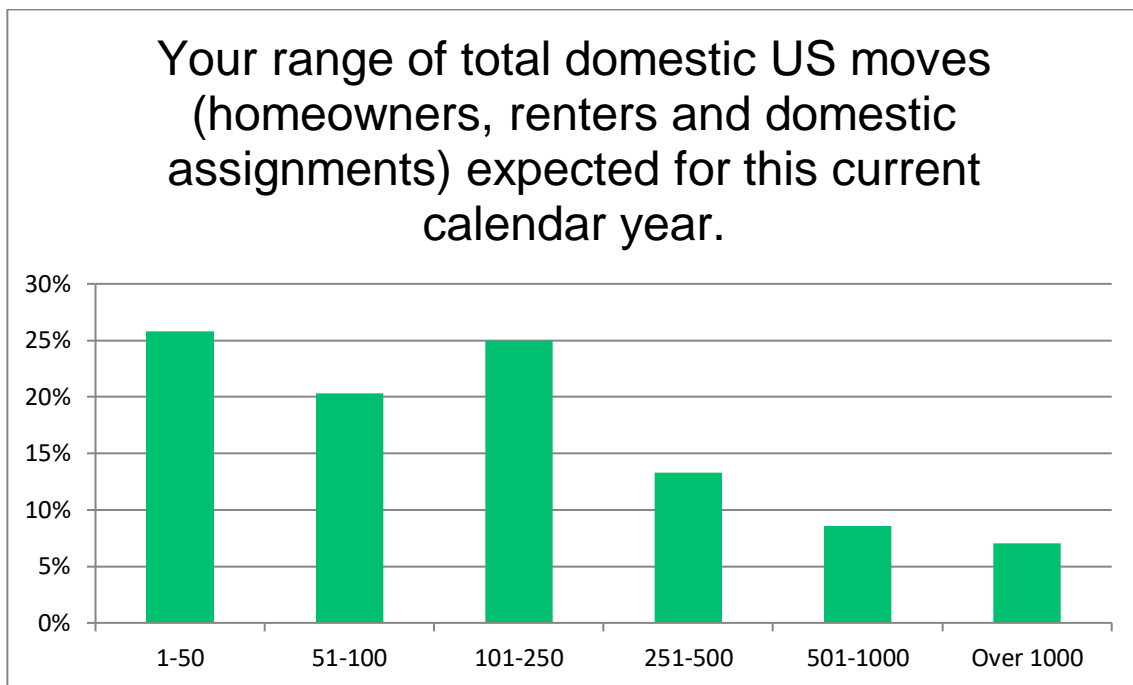
## CORPORATE PARTICIPANT PROFILE

The following chart shows the count of 128 participating corporate managers in this survey of which two did not provide an email address.

Email address (used to send you the final report).	
Answer Options	Response Count
	128
<i>answered question</i>	126
<i>skipped question</i>	2

The number of participants this year is lower than last year's participation.

### ANTICIPATED 2022 DOMESTIC U.S. VOLUME



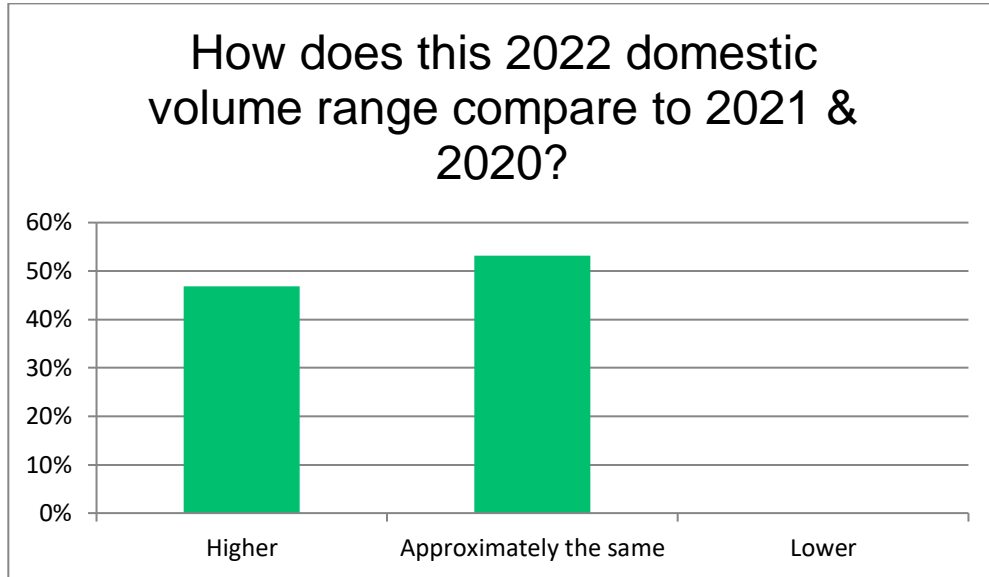
The 1-50 transfer volume segment accounts 26% of participants while 25% of participants expect 2022 volume to be in the 101-250 ranges.

Overall, this survey indicates a greater percentage of low-volume corporate movers compared to last year. This chart data is very similar to the October managers' survey on RMC performance.

### 2022 DOMESTIC VOLUME COMPARED TO "COVID-19" YEARS 2021 & 2020



The following question and answer, shown on next page, indicates the industry expects 2022 volume to be higher than the past two “COVID-years.”



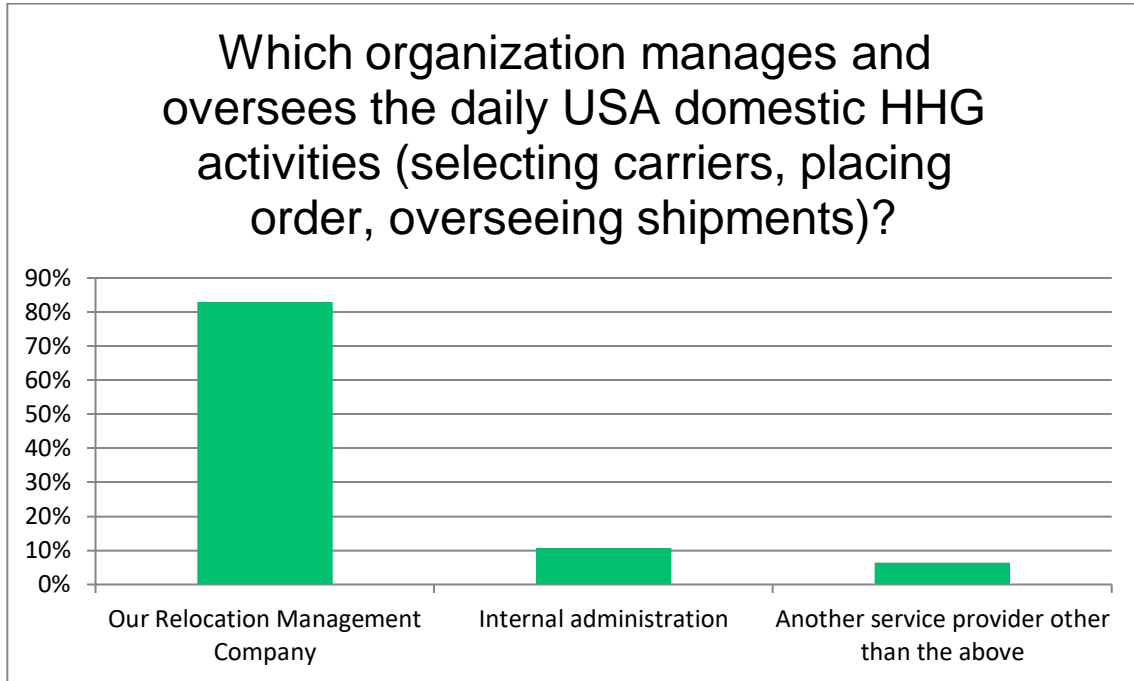
Approximately 53% of corporations expect volume to be the same this year compared to 2021.

However, 47% expect the volume to be higher compared to 0% expecting volume to be lower this year.

**Note:** This response indicates many corporations expect a rebound in domestic transfer volume in 2022 compared to the pandemic ridden 2021 & 2020 years.

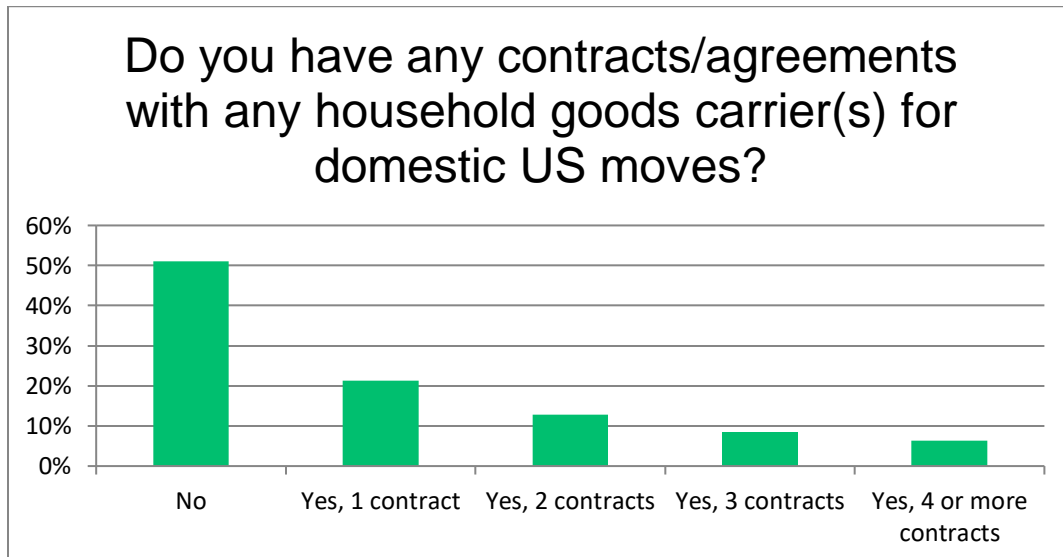
# HOUSEHOLD GOODS PROGRAM ADMINISTRATION

## DAILY MANAGEMENT OF HOUSEHOLD GOODS PROGRAM



Approximately 83% of corporations outsource the management of the household goods program to a relocation management company. This continues a multi-year increasing trend towards outsourcing HHG program administration to an RMC. Last year's rate was 81%.

## CORPORATIONS CONTRACTING WITH HHG



This year's survey indicates 51% of corporations do not have contracts with carriers. This rate is lower than 60% in last year's survey. One contract is most common when contracts are awarded.

**USE OF PERFORMANCE METRICS**

**Do you have performance metrics (i.e. SLAs) established with either the RMC, internal department or the carrier? Select the appropriate answer. Multiple answers permitted.**

Answer Choices	Responses
Confidential information; can not be shared	4%
No HHG performance metrics are established	11%
Yes, only the RMC (or internal department) has performance metrics	24%
Yes, only the Carrier/Agent has performance metrics	11%
Yes, both RMC and Carrier/Agent(s) have performance metrics	50%

Approximately 85% of all corporations use performance metrics (“SLAs”) to evaluate performance of the HHG program. The most common arrangements (50%) are SLAs on both carriers and the RMC.

**PERMIT RELOCATION MANAGEMENT COMPANIES TO “GO OFF-LIST”**

**Regardless whether or not you contract directly with a carrier(s) to what degree do you permit your RMC or internal department to use carriers other than your "preferred" or "contracted" suppliers?**

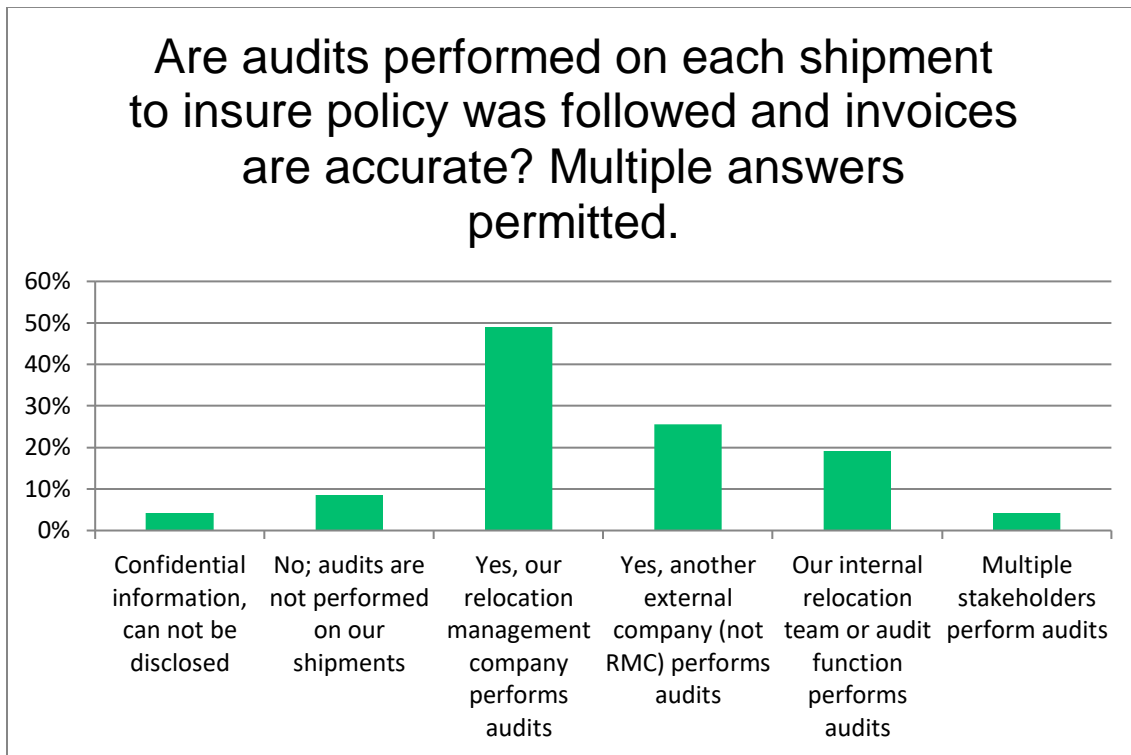
Answer Choices	Responses
Our RMC or internal department can award moves to the best-qualified or available HHG carrier.	23%
We expect all our moves to go to preferred or contracted HHG suppliers	55%

Although we prefer moves go to certain HHG carriers our RMC or other external partner has a degree of flexibility to award a move to non-preferred or non-contracted HHG supplier when circumstances warrant an "off-list" selection.

21%

A 55% majority of corporations expect moves to be assigned to contracted or preferred carriers – if a contract exists.

**AUDITS OF HHG**



Nearly one-half of corporations rely on the relocation management company to perform audits of policy and/or invoices. This is 13-percentage points lower than last year.

On the flip-side 26% of corporations outsource to a different external supplier other than an RMC to perform audits - up from 18% last year.



## HOUSEHOLD GOODS SHIPMENT POLICY

### PHILOSOPHICAL APPROACH TO POLICY DESIGN

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.

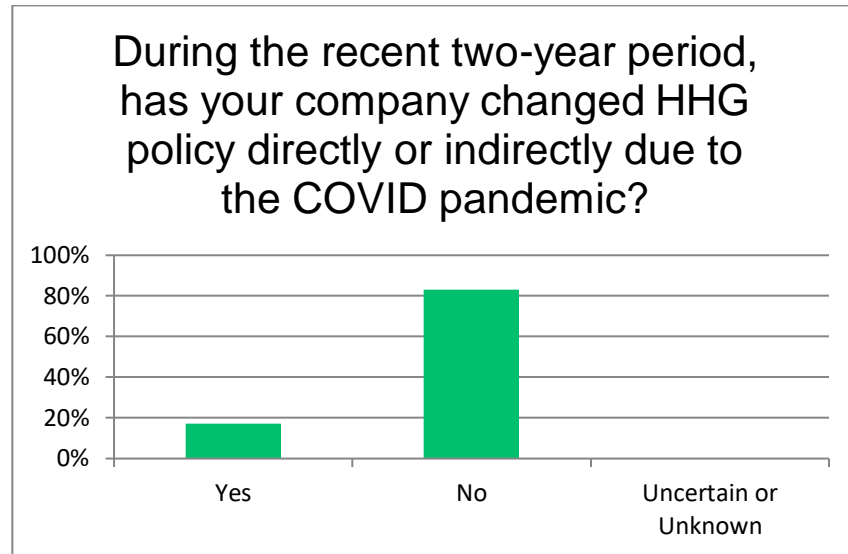
	Yes, true statement	Both "groups" receive the same HHG benefits	False statement; another approach used on this variable
<b>Higher organizational levels</b> obtain more HHG benefits than lower organizational levels	26%	70%	4%
<b>Current employees</b> generally receive more HHG benefits than new hires	6%	85%	9%
<b>Homeowners</b> generally receive more HHG benefits than renters	19%	70%	11%
<b>Transferees with a family</b> receive more HHG benefits than single transferees	17%	68%	15%
<b>Experienced new hires</b> receive more HHG benefits than inexperienced new hires	15%	74%	11%

The following statements are true for the majority (68% or higher) of corporations participating in this survey:

- 70% of corporate managers stated higher organizational levels obtain the same HHG benefits as lower levels,
- 85% of corporate managers stated current employees obtain the same HHG benefits as new hires,
- 70% of corporate managers stated homeowners obtain the same HHG benefits as renters, and
- 68% of corporate managers stated families obtain the same HHG benefits as single transferees, and
- 68% of corporate managers stated experienced new hires obtain the same HHG benefits as inexperienced new hires.

### POLICY CHANGES TO HHG POLICY DUE TO COVID-19

As the chart on the next page indicates, approximately 83% of corporations did not change household goods policy during the 2-year pandemic.



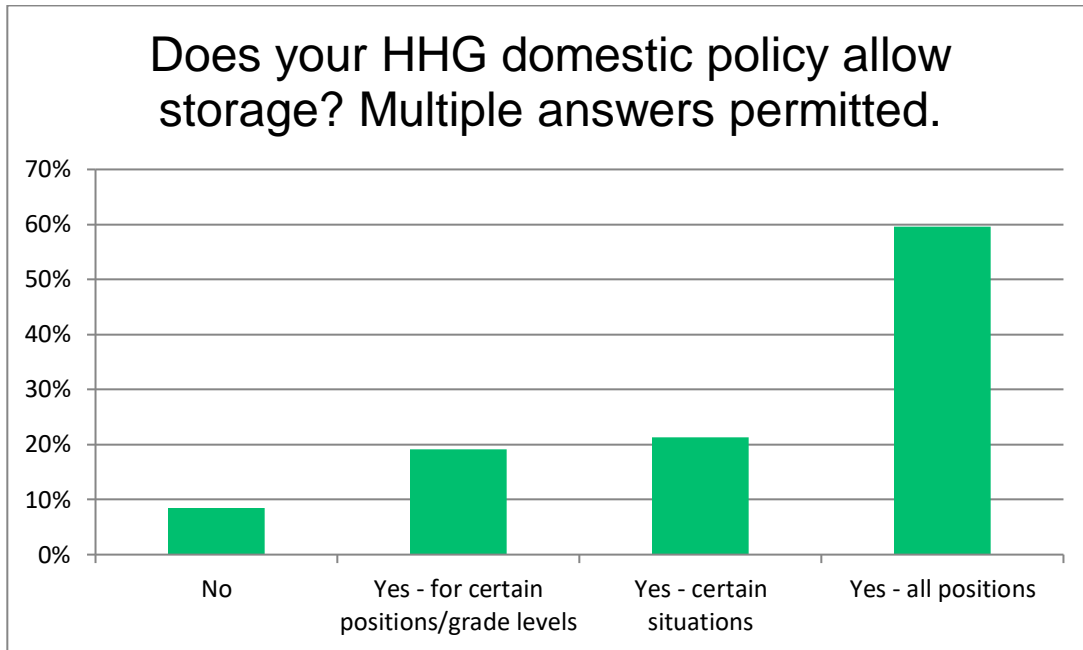
#### **CAR SHIPMENTS**

Car shipment policies vary among corporations based on experience and organizational level.

- New hires:
  - 10% of corporations permit only 1 car to be moved.
  - 28% permit 1 car if a minimum mileage requirement is met.
  - 43% permit 1 car plus a second car if a minimum mileage requirement is met.
  - 14% permit 1 car for each eligible family member if a minimum mileage requirement is met.
  - 5% do not permit any car shipment
- Any existing employee (excluding executives):
  - 7% of corporations permit only 1 car to be moved.
  - 25% permit 1 car if a minimum mileage requirement is met.
  - 48% permit 1 car plus a second car if a minimum mileage requirement is met.
  - 14% permit 1 car for each eligible family member if a minimum mileage requirement is met.
  - 5% do not permit any car shipment
- Executives:
  - 12% of corporations permit only 1 car to be moved.
  - 19% permit 1 car if a minimum mileage requirement is met.
  - 52% permit 1 car plus a second car if a minimum mileage requirement is met.
  - 21% permit 1 car for each eligible family member if a minimum mileage requirement is met.
  - 3% do not permit any car shipment

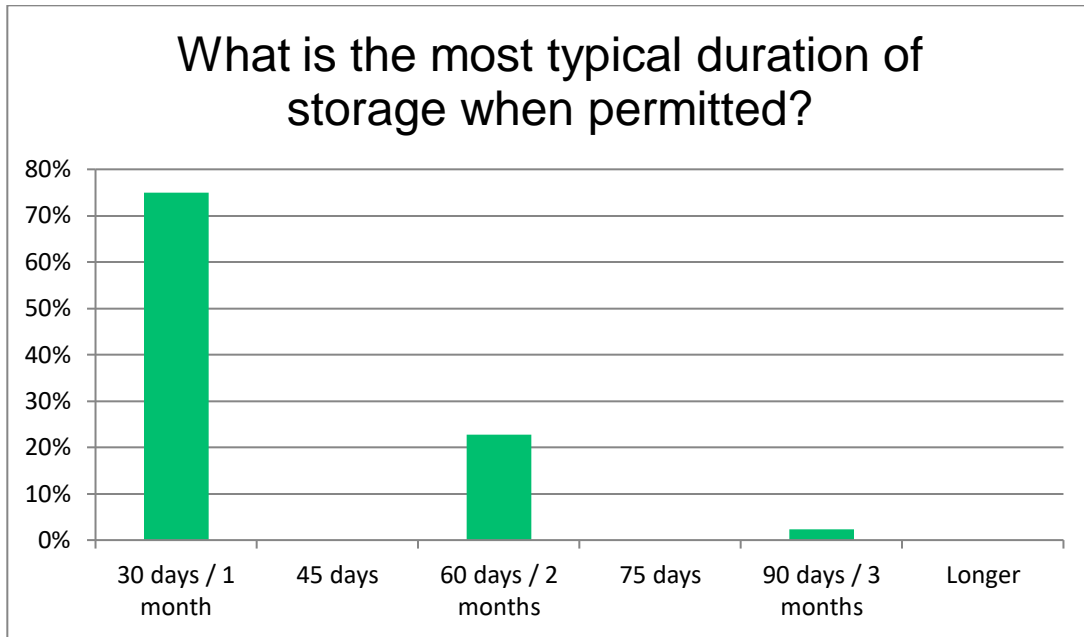
## **STORAGE**

As the chart on the next page indicates, approximately 91% of corporations permit HHG storage for some or selected positions on domestic moves. The most common corporate approach – used by nearly 60% of corporations - is to permit storage for all positions.



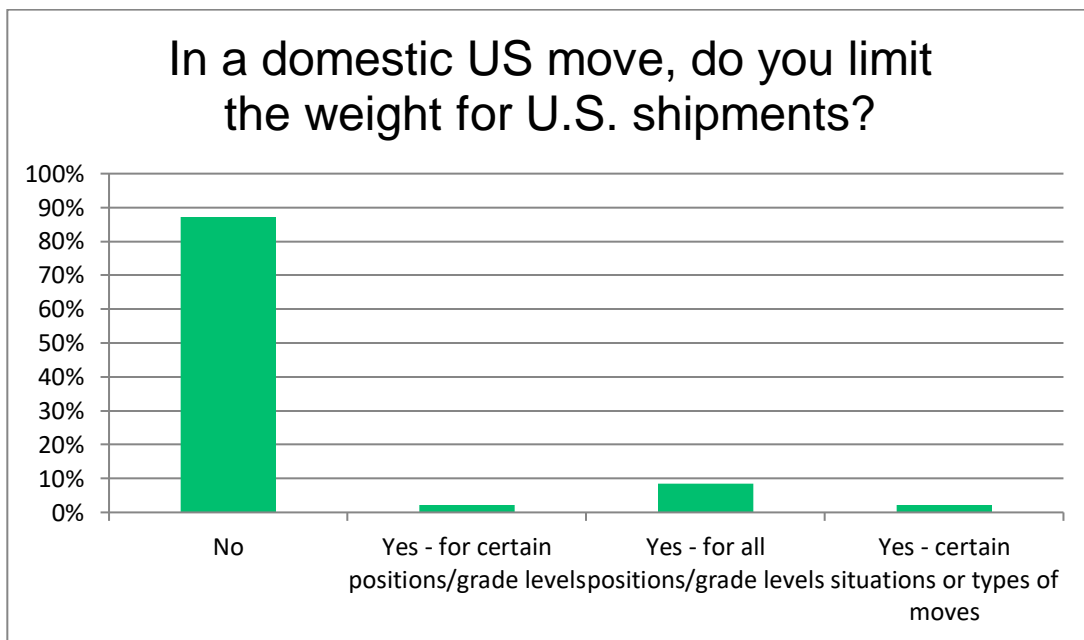
When corporate programs do not permit all employees access to storage usually the lower organizational levels or inexperienced new hires are denied storage.

**DURATION OF STORAGE**



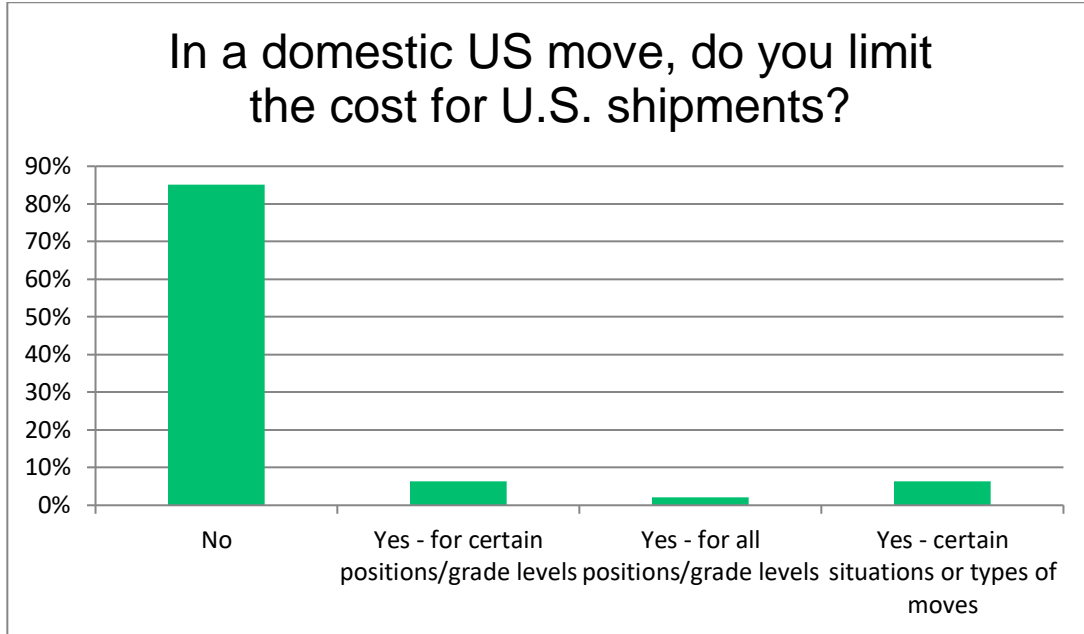
When storage is provided 30 days is the most common duration. The percentage of companies having the 30-day limit is now 74% compared to 51% in last year's survey.

**MAXIMUM WEIGHT TO SHIP HOUSEHOLD GOODS**



A high 87% majority of corporations do not have maximum shipment weight in HHG programs. This percentage is slightly higher than last year's survey (83%).

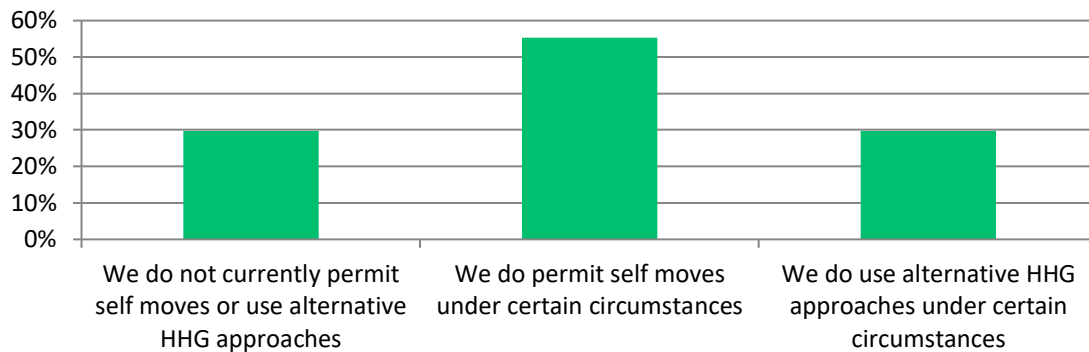
**MAXIMUM COST TO SHIP HOUSEHOLD GOODS**



A high 85% majority of corporations do not have any maximum cost exposures on a transfer. This is down 5-percentage points from last year's survey.

**ALTERNATIVE METHODS TO SHIP HOUSEHOLD GOODS**

Do you currently permit self-moves or are you using alternative approaches to HHG shipments? These alternatives might include container-type approaches (example: PODS).



Multiple answers were permitted explaining the percentage total exceeding 100%.

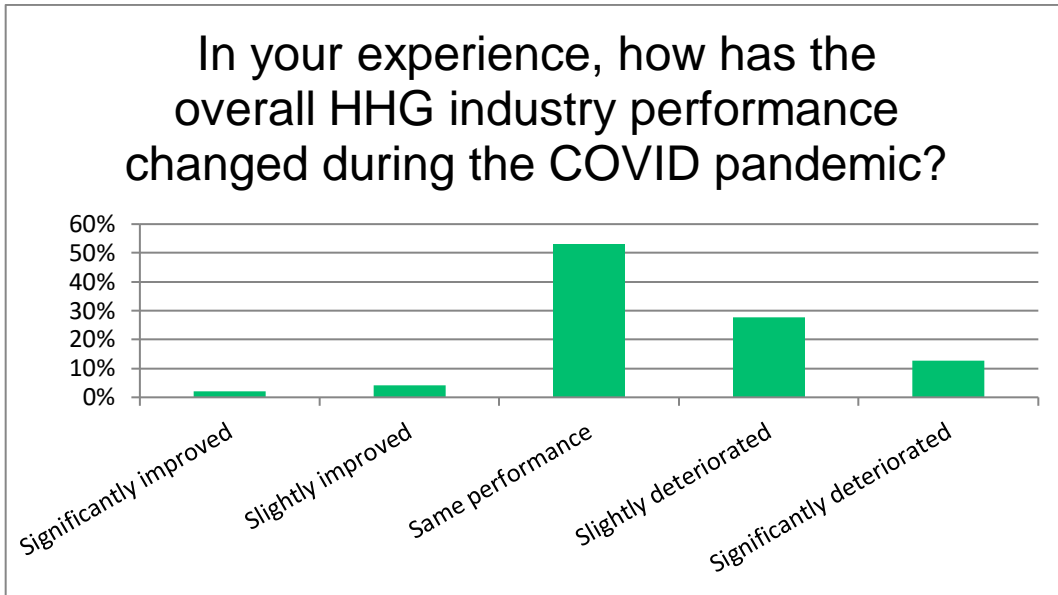
Approximately 55% of corporations permit self-moves under certain circumstances and 30% use alternative moving approaches under certain circumstances.

Approximately 30% corporations neither currently use alternative methods nor plan to do so in the future. This percentage is up 2-points from last year.



## INDUSTRY OVERALL PERFORMANCE

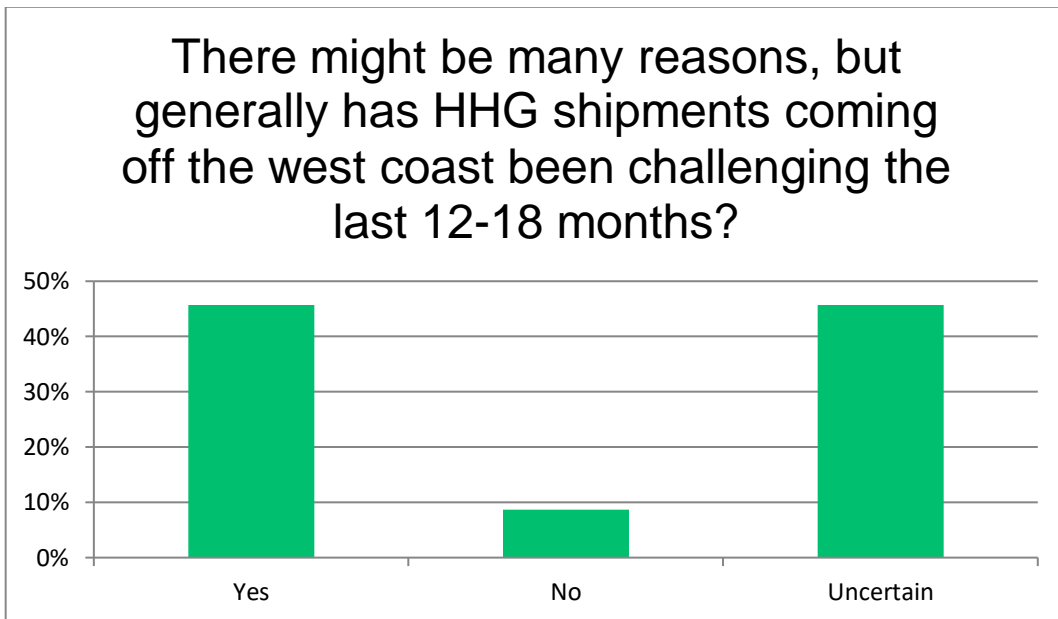
### SATISFACTION WITH THE HHG INDUSTRY



Approximately 53% of managers believe performance is the same as a year ago. This is 10-points lower than last year.

Approximately 41% of managers believe performance has deteriorated from the prior year's survey. This is a huge uptick in dissatisfaction from last year. Conversely, only 4% believe performance has improved from a year ago.

### WEST COAST PORT PROBLEMS



Approximately 46% of corporate managers are uncertain if the container issues faced by the west coast ports have impacted domestic HHG. However, another 46% believe the port issues have created challenges for the industry and, by inference, transferring employees' shipments.

**FACTORS IMPACTING THE INDUSTRY'S PERFORMANCE**

**From your experience which factors are impacting overall performance of HHG carriers? More than one answer is permitted.**

Answer Choices	Responses
Low profits or deteriorating margins	39%
COVID-19 pandemic	87%
Lack of available talent (drivers in particular)	80%
Relocation management companies are squeezing carriers	20%
Inability to handle peak surges in move volume	43%
Government regulation	11%
Too few competitors	0%
Quality of services is slipping	17%

Approximately 87% of corporate managers believe the primary factor impacting industry performance is COVID-19. This is followed by 80% saying lack of talent (drivers in particular). Both percentages are up from a year ago and are far ahead of any other factor.

## SUPPLIERS' PERFORMANCE

### OVERALL PERFORMANCE

	Scores										Count	Aver	Top Block %	Bottom Block %	Net Satis. %
	1	2	3	4	5	6	7	8	9	10					
Allied Worldwide					1		4	12	8	5	30	8.37	43%	3%	40%
Atlas Van Lines						1	17	18	44	13	93	8.55	61%	1%	60%
<b>Budd Van Lines</b>								6	4	6	16	9.00	63%	0%	63%
Mayflower Van Lines					1	1	2	4	1	1	10	7.60	20%	20%	0%
New World Van Lines		1				1		9	2	1	14	7.71	21%	14%	7%
North American							1	5	9	6	21	8.95	71%	0%	71%
United Van Lines					1		4	23	31	12	71	8.68	61%	1%	59%
Wheaton Van Lines							4	5	2	2	13	8.15	31%	0%	31%
Other not listed					1		1	2	7	2	13	8.54	69%	8%	62%
	0	1	0	0	4	3	33	84	108	48	281	8.52	56%	3%	53%

The household goods industry consolidated the past few years. One consequence of this industry

dynamic is fewer carriers are listed in the chart.

This year there were nearly 2.3 evaluations for every corporate manager participating in the survey.

The industry saw a decrease in the average satisfaction score to 8.32 this year from 8.74 last year. Net Satisfaction also decreased to 43% from 62% a year earlier. Most service suppliers realized a modest decrease in performance evaluations.

NorthAmerican Van Lines and Budd Van Lines were the two best-evaluated carriers. Budd Van Lines the best average score and northAmerican Van Lines earned the highest net satisfaction percentage.

**Budd was the only carrier to realize a modest improvement in "overall performance" category.**

There is a wide range of both average scores and net satisfaction percentages – more than past recent years surveys.

*On the next five questions the rating scale is a 4 high to 1 low. The maximum average score is 4.0 and the maximum net satisfaction percentage is 100%*

**PERFORMANCE: INVOICE ACCURACY AND TIMELINESS**

	4	3	2	1			Top	Bottom	Net
	Extremely Satisfied	Fairly Satisfied	Barely Acceptable	Unacceptably Poor	#	Aver	Block %	Block %	Satis. %
Allied Worldwide	15	12	3		30	3.40	50%	10%	40%
Atlas Van Lines	42	50	1		93	3.44	45%	1%	44%
<b>Budd Van Lines</b>	<b>8</b>	<b>8</b>			<b>16</b>	<b>3.50</b>	<b>50%</b>	<b>0%</b>	<b>50%</b>
Mayflower Van Lines	1	8	1		10	3.00	10%	10%	0%
New World Van Lines	5	8	1		14	3.29	36%	7%	29%
NorthAmerican	10	8	3		21	3.33	48%	14%	33%
United Van Lines	37	33	1		71	3.51	52%	1%	51%
Wheaton Van Lines	2	9	1	1	13	2.92	15%	15%	0%
Other not listed	6	5	2		13	3.31	46%	15%	31%
	126	141	13	1	281	3.40	45%	5%	40%

This is the first year Invoice Accuracy and Timeliness is included in the survey.

United Van Line earned the highest average score and highest net satisfaction percentage. Budd Van Line earned metrics only slightly behind United in rankings.

**PERFORMANCE: HANDLING AND MANAGING CAR SHIPMENTS**

	4	3	2	1			Top	Bottom	Net
	Extremely Satisfied	Fairly Satisfied	Barely Acceptable	Unacceptably Poor	#	Aver	Block %	Block %	Satis. %
Allied Worldwide	11	16	3		30	3.27	37%	10%	27%
Atlas Van Lines	53	39	1		93	3.56	57%	1%	56%
<b>Budd Van Lines</b>	<b>11</b>	<b>5</b>			<b>16</b>	<b>3.69</b>	<b>69%</b>	<b>0%</b>	<b>69%</b>
Mayflower Van Lines	2	7	1		10	3.10	20%	10%	10%
New World Van Lines	3	9	1		13	3.15	23%	8%	15%
NorthAmerican	15	6			21	3.71	71%	0%	71%
United Van Lines	40	31			71	3.56	56%	0%	56%
Wheaton Van Lines	2	9	2		13	3.00	15%	15%	0%
Other not listed	5	7	1		13	3.31	38%	8%	31%
	142	129	9	0	280	3.48	51%	3%	48%

This is the first year Car Shipments is included in the survey.

NorthAmerican Van Line earned the highest average score and highest net satisfaction percentage. Budd Van Lines earned metrics only slightly behind northAmerican in rankings.

**PERFORMANCE: HANDLING AND MANAGING ISSUE RESOLUTION**

	4	3	2	1			Top	Bottom	Net
	Extremely Satisfied	Fairly Satisfied	Barely Acceptable	Unacceptably Poor	#	Aver	Block %	Block %	Satis. %
Allied Worldwide	18	11	1		30	3.57	60%	3%	57%
Atlas Van Lines	68	25			93	3.73	73%	0%	73%
<b>Budd Van Lines</b>	<b>10</b>	<b>6</b>			<b>16</b>	<b>3.63</b>	<b>63%</b>	<b>0%</b>	<b>63%</b>
Mayflower Van Lines	1	9			10	3.10	10%	0%	10%
New World Van Lines	4	10			14	3.29	29%	0%	29%
northAmerican	14	7			21	3.67	67%	0%	67%
United Van Lines	37	34			71	3.52	52%	0%	52%
Wheaton Van Lines	2	10	1		13	3.08	15%	8%	8%
Other not listed	11	2			13	3.85	85%	0%	85%
	165	114	2	0	281	3.58	59%	1%	58%

This is the first year Issue Resolution category is included in the survey.

Atlas Van Line earned the highest average score and highest net satisfaction percentage. northAmerican Van Line earned metrics slightly behind Atlas in rankings.

**PERFORMANCE: EQUITY, SUSTAINABILITY AND GOVERNANCE**

	4	3	2	1			Top	Bottom	Net
	Extremely Satisfied	Fairly Satisfied	Barely Acceptable	Unacceptably Poor	#	Aver	Block %	Block %	Satis. %
Allied Worldwide	20	10			30	3.67	67%	0%	67%
Atlas Van Lines	60	33			93	3.65	65%	0%	65%
<b>Budd Van Lines</b>	<b>12</b>	<b>4</b>			<b>16</b>	<b>3.75</b>	<b>75%</b>	<b>0%</b>	<b>75%</b>
Mayflower Van Lines	7	3			10	3.70	70%	0%	70%
New World Van Lines	7	7			14	3.50	50%	0%	50%
northAmerican	14	7			21	3.67	67%	0%	67%
United Van Lines	36	35			71	3.51	51%	0%	51%
Wheaton Van Lines	3	9	1		13	3.15	23%	8%	15%
Other not listed	9	4			13	3.69	69%	0%	69%
	168	112	1	0	281	3.59	60%	0%	59%

This is the first year a question on Equity, Sustainability and Governance is included in the survey.

**Budd Van Lines earned the highest average score and highest net satisfaction percentage.** Mayflower Van Line earned metrics slightly behind Budd in rankings.

**PERFORMANCE: ANY PRICE INCREASES WERE BASED ON SOUND, REASONABLE AND DETAILED REASONING**

	4	3	2	1			Top	Bottom	Net
	Extremely Satisfied	Fairly Satisfied	Barely Acceptable	Unacceptably Poor	#	Aver	Block %	Block %	Satis. %
Allied Worldwide	13	17			30	3.43	43%	0%	43%
Atlas Van Lines	21	71	1		93	3.22	23%	1%	22%
<b>Budd Van Lines</b>	<b>9</b>	<b>7</b>			<b>16</b>	<b>3.56</b>	<b>56%</b>	<b>0%</b>	<b>56%</b>
Mayflower Van Lines	2	8			10	3.20	20%	0%	20%
New World Van Lines	2	12			14	3.14	14%	0%	14%
NorthAmerican	14	7			21	3.67	67%	0%	67%
United Van Lines	17	54			71	3.24	24%	0%	24%
Wheaton Van Lines	3	10			13	3.23	23%	0%	23%
Other not listed	9	4			13	3.69	69%	0%	69%
	90	190	1	0	281	3.32	32%	0%	32%

This is the first year a question on Managing Price Increases is included in the survey.

NorthAmerican Van Line earned the highest average score and highest net satisfaction percentage. Budd Van Line followed northAmerican in rankings.