

T H I R T Y - S E C O N D   A N N U A L


1999  
Survey Of  
Corporate  
Relocation  
Policies

RESULTS



## Features from the 32nd Survey of Corporate Relocation Policies

This information is based upon the findings of the Atlas Van Lines 32nd Annual Survey of Corporation Policies, conducted in February and March 1999 with 214 companies participating. Unless otherwise noted, all data is in reference to domestic relocations occurring in 1998. The complete data begins on the next page, after the following highlights.



One of the more notable trends this year has to do with the internet. Three years ago, only 6 percent of the departments responsible for corporate relocation policies were using the internet. Two years ago, that number grew to 19 percent. Last year, 48 percent were online. Now, 71 percent are using the internet (question D-6). And, they're using it for things like staying in touch with relocating employees (27 percent, up from 19 percent one year ago) and for researching relocation-related matters (22 percent, up from 11 percent one year ago).

Employment assistance for trailing spouses rose from 12 percent to 19 percent (question F-1), though it is still not quite as prevalent as three years ago when it hit 21 percent. Another related change was also noted in the most common type of assistance being offered. Paying a job-finder's fee had been the most offered type of assistance for three years; however, it was edged out this year by the assistance to "find employment outside the company" for trailing spouses. For international relocations, employment assistance for trailing spouses rose from 10 to 14 percent (question I-11), while the most common type of assistance was again the payment of a job-finder's fee.

The offering of elder care dropped slightly from 19 to 16 percent (question F-5), although family ties remained as the most significant reason (70 percent) in those situations when a relocation was declined (question F-10). Spouse's employment and cost of living in the new location were tied for second place. For those employees declining a relocation, 29 percent of the respondents said that declining the opportunity to relocate will usually hinder a career (question F-7).

As for those employees accepting transfers, 58 percent of their companies provided full reimbursement of moving expenses. That number is down 10 percent from one year ago. The balance of relocation reimbursement options are: lump sum payment, 4 percent; partial reimbursement, 5 percent; no reimbursement, 1 percent; and, a combination of any of the options, 31 percent (question E-1). Then, when it comes to the buying or selling of an employee's residence, 74 percent will pay all fees connected with the purchase or sale of the home, and 28 percent will guarantee a sale price for the former residence (question E-6).

And once again, service has been ranked as most important in carrier selection for both domestic (question H-8) and international (question I-5) relocations since the question was first asked in 1981.

For more information, visit the Atlas web site at [www.atlasvanlines.com](http://www.atlasvanlines.com) or contact:

Jim Huth

Director, Corporate Communications

Atlas Van Lines, Inc.

1212 St. George Rd.

Evansville, IN 47711

800-638-9797

email: [jimhuth@atlasvanlines.com](mailto:jimhuth@atlasvanlines.com)



## Part A — Corporate Profile

1. Which one of the following classifications most accurately describes your company?
  - 48.0% Manufacturing/processing
  - 34.1% Service (includes education, health care, etc.)
  - 16.8% Financial (includes banking, insurance, investments, etc.)
  - 00.9% Government/military
2. In terms of operations, your company is...
  - 17.0% Regional
  - 32.1% National
  - 50.7% International
3. Your company's approximate annual sales for 1998 were...
  - 20.2% Less than \$100 million
  - 16.2% \$100-\$249 million
  - 13.4% \$250-\$499 million
  - 07.3% \$500-\$749 million
  - 10.1% \$750 million-\$1 billion
  - 32.5% Over \$1 billion
4. How many salaried (non-hourly) people are employed by your company?
  - 06.4% Less than 100
  - 17.7% 100-249
  - 18.2% 250-499
  - 17.7% 500-999
  - 21.1% 1,000-4,999
  - 18.7% 5,000 or more
5. How long has your company had a formal relocation policy?
  - 12.1% No formal policy
  - 00.4% Less than 1 year
  - 27.6% 1-5 years
  - 17.4% 6-10 years
  - 13.1% 11-15 years
  - 08.2% 16-20 years
  - 20.8% Over 20 years
6. Does your company administer employee relocations from a centralized department or from a decentralized (regional, local office) department?
  - 85.1% Centralized
  - 14.8% Decentralized (Skip to A-8)
7. If you answered "Centralized" to question A-6, does your company's centralized relocation department...(circle appropriate response to each question)
  - 30.8% Control air carrier selection?
  - 49.3% Control freight carrier selection?
  - 93.8% Control household goods carrier selection?
  - 31.4% Handle office relocations?
  - 16.0% Recommend site and space selection for office relocations?
  - 33.9% Handle air travel via commercial airlines?
8. If you answered "Decentralized" to question A-6, who selects the carrier for your employee's move?
  - 27.5% The company
  - 24.1% The employee
  - 34.4% The company and employee together
  - 13.7% A relocation firm
  - 00.0% Other

## RESULTS



- 9. Approximately how many employee relocations, within/to the U.S., was your company responsible for in 1998?
  - 34.5% 0-9
  - 18.4% 10-19
  - 14.6% 20-49
  - 11.8% 50-99
  - 06.6% 100-199
  - 05.2% 200-299
  - 00.9% 300-399
  - 07.5% 400 or more
  
- 10. Approximately how many employee relocations, within/to Canada, was your company responsible for in 1998?
  - 87.3% 0-9
  - 06.7% 10-19
  - 01.4% 20-49
  - 00.9% 50-99
  - 00.9% 100-199
  - 00.4% 200-299
  - 00.9% 300-399
  - 00.9% 400 or more
  
- 11. Rank the following in terms of relocation activity ("1" for the busiest period, through "4" for the least busy period).
  - 4 December 1997-February 1998
  - 2 March 1998-May 1998
  - 1 June 1998-August 1998
  - 3 September 1998-November 1998

**Part B — Respondent Profile**

**1999  
Survey Of  
Corporate  
Relocation  
Policies**

- 1. Which category best represents the function of your department?
  - 81.4% Human Resources/Personnel
  - 03.9% Traffic/Transportation
  - 03.4% Administration
  - 03.4% Compensation and Benefits
  - 04.8% Relocation Services
  - 02.9% Other
  
- 2. What is your position with the company?
  - 00.4% President
  - 25.5% Vice President
  - 00.9% Assistant Vice President
  - 10.4% Director
  - 28.4% Manager
  - 01.4% Department Head
  - 01.4% Supervisor
  - 17.0% Relocation Administrator
  - 14.2% Other
  
- 3. Are you...?
  - 41.9% Male
  - 58.0% Female
  
- 4. How many people are in your department?
  - 34.7% Less than 5 full-time people
  - 30.9% 5-9 full-time people
  - 15.2% 10-14 full-time people
  - 05.2% 15-19 full-time people
  - 04.2% 20-24 full-time people
  - 09.5% 25 or more full-time people

5. How many people were in your department one year ago?
- 33.6% Less than 5 full-time people
  - 33.6% 5-9 full-time people
  - 14.2% 10-14 full-time people
  - 07.1% 15-19 full-time people
  - 04.2% 20-24 full-time people
  - 07.1% 25 or more full-time people
6. Compared to 1997, did your 1998 relocation budget...
- 40.5% Stay the same?
  - 47.3% Increase?
  - 12.0% Decrease?
7. How many years have you held your current position?
- 09.0% Less than 1 year
  - 23.2% 1-2 years
  - 23.2% 3-5 years
  - 18.4% 6-10 years
  - 26.0% Over 10 years
8. Which trade publications do you regularly read? (check each applicable response)
- 13.0% *Corporate Relocation News*
  - 05.0% *Distribution*
  - 14.0% *HR Focus*
  - 62.8% *HR Magazine*
  - 21.1% *HR News*
  - 04.5% *HR Wire*
  - 40.2% *Human Resource Executive*
  - 04.5% *Human Resources Professional (Canadian)*
  - 25.6% *Mobility*
  - 08.5% *National Relocation and Real Estate*
  - 04.0% *Purchasing*
  - 00.5% *Relocation 2000*
  - 07.5% *Relocation Compass*
  - 03.5% *Relocation Report*
  - 02.0% *Relocation Quarterly*
  - 05.5% *The Globe and Mail*
  - 16.5% *The Runzheimer Reports on Relocation*
  - 03.0% *Traffic Management*
  - 02.0% *Traffic World*
  - 03.5% *Transportation and Distribution*
  - 02.0% *Transport Topics*
  - 10.0% *Workforce*
  - 09.5% Other
9. To what relocation-related associations do you currently belong?
- 28.2% ERC (U.S.)
  - 08.9% CERC (Canada)
  - 01.3% Industrial Traffic League
  - 62.7% SHRM
  - 22.0% Regional or local relocation council
  - 08.9% Other

## RESULTS

### Part C — Transferee Profile

1. What is the age range of your company's most frequently transferred salaried employee?
- 02.0% Less than 25 years
  - 09.1% 25-30
  - 24.3% 31-35
  - 40.6% 36-40
  - 16.7% 41-45
  - 07.1% More than 45 years



1999  
Survey Of  
Corporate  
Relocation  
Policies

- 2. What is the salary range of your company's most frequently transferred employee?
  - 01.5% Less than \$30,000
  - 05.0% \$30,000-\$39,999
  - 15.1% \$40,000-\$49,999
  - 20.7% \$50,000-\$59,999
  - 23.7% \$60,000-\$69,999
  - 33.8% \$70,000 and higher
  
- 3. How frequently is your "average transferee" relocated?
  - 09.6% Every two years or more often
  - 35.5% Once every three to five years
  - 16.2% Once every six to ten years
  - 38.5% Less frequently than once every ten years
  
- 4. In 1998, what percentage of your transferred employees were women?
  - 15.8% None
  - 32.3% Less than 5%
  - 15.8% 5%-10%
  - 12.8% 11%-20%
  - 06.6% 21%-30%
  - 08.7% 31%-40%
  - 06.6% 41%-50%
  - 01.0% 51% or more
  
- 5. In 1998, what percentage of your transferred employees were other than male Caucasian?
  - 22.0% None
  - 29.5% Less than 5%
  - 20.9% 5%-10%
  - 08.6% 11%-20%
  - 06.9% 21%-30%
  - 04.3% 31%-40%
  - 04.8% 41%-50%
  - 02.6% 51% or more
  
- 6. In 1998, what percentage of your transferred employees were people with disabilities?
  - 71.8% None
  - 25.9% Less than 5%
  - 01.6% 5%-10%
  - 00.0% 11%-20%
  - 00.0% 21%-30%
  - 00.0% 31%-40%
  - 00.0% 41%-50%
  - 00.5% 51% or more
  
- 7. In 1998, what percentage of your relocations involved a trailing spouse that was a wife?
  - 07.1% None
  - 07.1% Less than 5%
  - 06.6% 5%-10%
  - 03.0% 11%-20%
  - 07.6% 21%-30%
  - 07.1% 31%-40%
  - 08.1% 41%-50%
  - 53.0% 51% or more
  
- 8. In 1998, what percentage of your relocations involved a trailing spouse that was husband?
  - 41.3% None
  - 30.8% Less than 5%
  - 15.1% 5%-10%
  - 08.3% 11%-20%
  - 02.0% 21%-30%
  - 00.5% 31%-40%
  - 00.5% 41%-50%
  - 01.0% 51% or more

9. Comparing the number of employee transfers in 1998 with 1997, the 1998 number...
  - 11.1% Increased greatly
  - 39.1% Increased moderately
  - 05.7% Decreased greatly
  - 11.1% Decreased moderately
  - 32.8% Remained about the same
  
10. Compared to 1998, do you anticipate that the number of employees your company will move during 1999 will...?
  - 27.2% Increase
  - 23.9% Decrease
  - 48.8% Remain about the same
  
11. Compared to 1998, do you estimate that your company's number of relocations in 2003 will be...?
  - 70.9% More
  - 29.0% Less
  
12. If your number of employee transfers changed from 1997 to 1998, what external conditions had the most significant impact on that number? (check each applicable response)
  - 25.0% Economic conditions
  - 58.1% Growth of company
  - 38.3% Lack of qualified people locally
  - 09.8% Growth of domestic competition
  - 09.8% Growth of international competition
  - 09.3% External conditions had no impact
  - 06.9% Other
  
13. How long does an employee have to accept a transfer offer?
  - 15.0% 1 week or less
  - 44.4% Up to 2 weeks
  - 08.3% Up to 3 weeks
  - 25.5% Up to 1 month
  - 02.2% Up to 2 months
  - 02.2% Up to 3 months
  - 02.2% More than 3 months
  
14. What internal company conditions affected the change in the number of employee transfers from 1997 to 1998? (check each applicable response)
  - 19.3% Increased production
  - 02.2% Decreased production
  - 19.3% Expansion of facility
  - 19.3% Closing of facility
  - 12.7% Budget constraints
  - 28.7% Expansion into new territories
  - 31.4% Acquisitions/mergers
  - 39.7% Corporate reorganization
  - 48.0% Promotions/resignations
  - 13.8% International expansion
  - 04.4% Internal conditions had no impact
  - 02.7% Other
  
15. Does your company allow the hiring of spouses of employees?
  - 12.5% No
  - 75.8% Yes, but not in the same department/division
  - 01.9% Yes, but not at the same location
  - 09.6% Yes, without restriction

## RESULTS

16. Which category of your company's work force is most likely to experience the greatest number of relocations?
- 41.4% Sales
  - 19.5% Plant/facility management
  - 13.6% Engineering
  - 01.7% Data processing
  - 11.8% Administration
  - 03.5% Research and development
  - 05.9% Finance
  - 02.3% Marketing

## Part D — Policy Administration

1. How is information about your company's employee relocation policy made known to your employees? (check each applicable response)
  - 08.0% Employee is provided e-mail material describing all procedures and conditions
  - 44.3% Employee is provided printed material describing all procedures and conditions
  - 50.9% Employee is provided printed material describing company policies, and this information is explained by authorized personnel within the company
  - 16.5% Pre-move counseling is provided within the company
  - 19.8% There is no set policy—each case is handled individually and explained on a one-to-one basis
  - 16.0% Professional counseling is provided by a relocation firm
  - 03.3% Other
2. How did your corporate relocation policy change during 1998?
  - 79.9% Did not change
  - 10.0% Created a more liberal policy
  - 10.0% Created a more limited policy
3. During 1998, did your firm outsource the administration of any relocation service for the first time?
  - 10.4% Yes
  - 89.5% No (Skip to D-6)
4. If you answered "Yes" to question D-3, which services? (check each applicable response)
  - 45.4% Real estate
  - 22.7% Counseling
  - 68.1% Household goods transportation
  - 00.0% Other
5. If "Yes" to question D-3, why?
  - 00.0% Staff reduction
  - 26.6% Cost
  - 73.3% Better administered outside of company
6. How is the Internet used for relocation-related matters? (check each applicable response)
  - 29.2% Internet is not used by this department
  - 33.4% Internet is used by this department, but not for relocation-related matters
  - 21.6% Internet is used to research relocation-related matters (including survey information, real estate and trailing spouse assistance)
  - 27.3% Internet is used to communicate via e-mail with relocating employees (including pre-move and post-move information)
  - 04.2% Other
7. How many expense-paid trips does your company allow an employee to find housing in the new location?
  - 02.9% None
  - 39.5% One
  - 48.7% Two
  - 07.8% Three
  - 00.9% Four or more

8. How many expense-paid days are allowed for a house-hunting trip?
- 12.1% 1-2
  - 32.0% 3-4
  - 21.3% 5-6
  - 16.9% 7-9
  - 04.8% 10-14
  - 12.6% Other
9. How many expense-paid house-hunting trips is the spouse allowed?
- 10.3% None
  - 38.6% One
  - 45.0% Two
  - 05.4% Three
  - 00.4% Four or more

## Part E — Relocation Costs

1. To what extent does your company reimburse moving expenses of transferees?
- 57.7% Full reimbursement of moving expenses
  - 04.3% Lump sum payment
  - 05.3% Partial reimbursement based on salary, position, tenure, etc.
  - 01.4% No reimbursement of moving expenses
  - 31.0% A combination of a,b,c and/or d
2. To what extent does your company reimburse moving expenses of new hires?
- 38.6% Full reimbursement of moving expenses
  - 05.7% Lump sum payment
  - 15.4% Partial reimbursement based on salary, position, tenure, etc.
  - 00.9% No reimbursement of moving expenses
  - 39.1% A combination of a,b,c and/or d
3. Does your company's moving policy allow more benefits for new hires or for transferees?
- 02.8% New hires
  - 48.8% Transferees
  - 48.3% No difference
4. Does your company reimburse/pay the relocating employee... (circle appropriate response to each question)
- 60.1% To move unlimited weight?
  - 85.0% To move an automobile?
  - 50.2% To move a second automobile?
  - 17.9% To move a boat?
  - 26.8% To have belongings picked up from a secondary residence (summer home, relative's home, etc.)?
  - 02.4% To hire temporary maid service at either the old or the new residence?
  - 93.0% To pack all items?
  - 39.3% To have permanent/extended storage of some possessions?
  - 38.3% To move collections of highly valuable objects like statuary, paintings and antiques?
  - 33.3% To move pets?
  - 53.2% To move recreation and lawn equipment?
  - 26.3% To move satellite TV dishes?
  - 56.7% To carry items down from an attic?
  - 70.6% To move exercise equipment?
5. If your company will buy an employee's former residence, how do you determine the sale price?
- 65.3% Pay the average of several appraisals
  - 00.9% Pay the employee's appraised value
  - 01.9% Negotiate with the employee
  - 00.0% Pay the employee's asking price
  - 13.4% Arrange with a national Realtor to act on behalf of the company and the employee
  - 18.2% Other

## RESULTS



6. Which of the following practices does your company authorize for the buying or selling of an employee's home...(circle appropriate response to each question)
  - 09.8% Pay none of the selling costs?
  - 11.0% Pay only the real estate commission?
  - 74.4% Pay all fees connected with purchase or sale of the house (lawyer, title, land, surveys, etc.)?
  - 27.9% Guarantee a sale price for the employee's former residence?
  - 25.0% Actually purchase the employee's former residence?
  - 56.9% Pay a lease-termination penalty?
  - 01.1% Assist in the sale of a vacation home?
  - 07.5% Offer no assistance in the new location?
  - 28.4% Assist with the arrangement of a mortgage or swing loan?
  - 29.6% Pay a cash bonus?
  - 25.0% Offer a mortgage-interest differential?
  - 19.1% Offer a cost-of-living differential?
  - 29.6% Pay a lump sum for temporary living/house-hunting expenses?
  - 18.6% Pay for appraisals on houses in new location?
  
7. The total moving cost (total of the three costs for services in question E-7) is what percentage of your company's total cost of relocating an employee?
  - 02.1% Less than 10%
  - 07.7% 11%-25%
  - 16.1% 26%-49%
  - 19.0% 50%-74%
  - 17.6% 75%-84%
  - 37.3% 85% or more
  
8. What protection coverage does your company authorize for the transportation of the household goods?
  - 09.4% A released rate of 60¢ per pound per article
  - 29.0% Declared value protection (depreciation value)
  - 61.4% Full replacement
  
9. Who is the provider of transit protection for relocating employees' goods?
  - 80.5% Van line
  - 09.2% Outside insurance company
  - 06.1% Company self-insured
  - 04.1% Employee provides
  
10. When a transferee or new hire will be renting (not buying), does your company...(circle appropriate response to each question)
  - 73.9% Pay/reimburse for lease cancellation?
  - 30.8% Pay/reimburse for hook-up fees?
  - 23.4% Pay/reimburse security deposits?
  - 27.1% Pay/reimburse apartment search fees?
  - 44.6% Offer storage?
  - 62.2% Offer homefinding trips?
  - 60.1% Offer to move one or more automobiles?
  - 31.3% Apply temporary living allowance toward rent?

## Part F— Relocation Services

1. How does your company assist an employee's spouse in finding employment in the new location?
  - 81.0% No assistance
  - 08.1% Pay job-finder's fee
  - 01.0% Find employment within the company
  - 09.7% Find employment outside the company
  - 00.0% Pay spouse's full or partial salary until hired

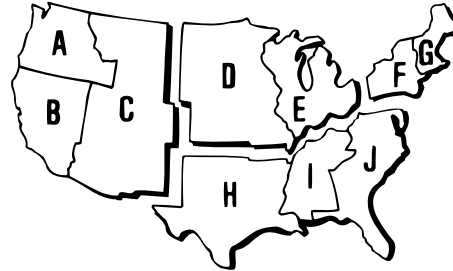
2. What job placement assistance does your company offer the "partner" or "significant other" of an unmarried transferee?
  - 80.4% No job placement assistance
  - 16.5% Same as spousal assistance
  - 03.0% Other
  
3. How many times in 1998 did an employee utilize your spousal, or partner, employment assistance?
  - 88.4% 0-9
  - 07.1% 10-19
  - 02.8% 20-49
  - 00.7% 50-99
  - 00.0% 100-199
  - 00.7% 200 or more
  
4. What assistance does your company provide to the transferee for elder care? (check each applicable response)
  - 84.2% No elder care assistance
  - 12.3% Provide list of nursing homes and/or day-care centers
  - 00.9% Reimburse for outside care
  - 05.9% Allow transferee to use pre-tax dollars for outside care
  - 00.9% Move the elderly relative that does not live with the transferee
  - 04.9% Move the elderly relative that does not live with the transferee presently, but will live with the transferee in the new location
  
5. How frequently is an employee's relocation affected by the employment status of that employee's spouse?
  - 06.5% Almost always
  - 34.5% Frequently
  - 44.5% Seldom
  - 14.5% Never
  
6. Does declining the opportunity to relocate usually hinder an employee's career?
  - 29.1% Yes
  - 70.8% No
  
7. Did at least one of your employees decline the opportunity to relocate during 1998?
  - 66.1% Yes
  - 33.8% No (Skip to Part G)
  
8. If you answered "Yes" to question F-8, did the number of employees declining relocation in 1998...?
  - 13.3% Increase from the 1997 level
  - 04.1% Decrease from the 1997 level
  - 82.5% Remain about the same as the 1997 level
  
9. If you answered "Yes" to question F-8, what reasons did the employees give for declining relocation? (check each applicable response)
  - 48.4% Cost of living in the new location
  - 69.8% Family ties
  - 24.6% Housing/mortgage concerns
  - 48.4% Spouse's employment
  - 41.2% No desire to move
  - 37.3% Personal
  - 02.3% Could hurt career
  - 05.5% Other

## RESULTS

## Part G — Geography

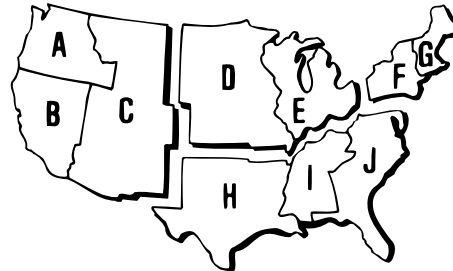
1. The majority of your employees relocated in and/or to the U.S. in 1998 were moved to which region?

01.8%	North Pacific (A)
09.6%	South Pacific (B)
04.2%	Mountain (C)
12.1%	North West Central (D)
20.6%	North East Central (E)
08.4%	Middle Atlantic (F)
04.2%	New England (G)
13.3%	South West Central (H)
04.8%	South East Central (I)
18.7%	South Atlantic (J)
01.8%	No relocations to/within the U.S. during 1998



2. Which region of the U.S. was most often declined for relocation by your employees during 1998?

00.6%	North Pacific (A)
17.0%	South Pacific (B)
05.0%	Mountain (C)
06.3%	North West Central (D)
07.5%	North East Central (E)
11.3%	Middle Atlantic (F)
02.5%	New England (G)
03.7%	South West Central (H)
01.8%	South East Central (I)
05.6%	South Atlantic (J)
37.9%	No relocations declined to/within the U.S. during 1998



3. The majority of your employees relocated in and/or to Canada in 1998 were moved to which province/territory?

02.5%	Alberta
01.2%	British Columbia
00.6%	Manitoba
00.0%	New Brunswick
00.6%	Newfoundland
00.6%	Nova Scotia
15.0%	Ontario
00.6%	Prince Edward Island
00.6%	Quebec
00.6%	Saskatchewan
00.0%	Northwest Territories
00.0%	Yukon Territory
77.3%	No relocations to/within Canada during 1998

4. Which province/territory of Canada was most often declined for relocation by your employees during 1998?

00.6%	Alberta
00.0%	British Columbia
00.0%	Manitoba
00.6%	New Brunswick
00.0%	Newfoundland
00.0%	Nova Scotia
04.1%	Ontario
00.0%	Prince Edward Island
00.6%	Quebec
00.0%	Saskatchewan
00.0%	Northwest Territories
00.0%	Yukon Territory
93.8%	No relocations declined to/within Canada during 1998

5. Regarding cross-border relocation, your company, during 1998, relocated employees cross-border to...? (check each applicable response)
  - 21.4% Canada
  - 27.1% U.S.
  - 10.7% Mexico
  - 61.0% No cross-border relocations
  
6. Regarding cross-border relocation, does your company relocate cross-border through a ...? (check each applicable response)
  - 41.7% Relocation company
  - 04.3% Forwarder
  - 05.4% Broker
  - 48.3% Household goods carrier
  - 14.2% Other
  
7. Rank the following for cross-border carrier selection ("1" for the most important, through "5" for the least important).
  - 2 Service
  - 1 Price
  - 3 Third party
  - 5 Scheduling
  - 4 Reputation

## Part H — Transportation

1. With how many carriers does your company have contractual agreements for the transportation of household goods?
  - 22.0% None
  - 30.8% One carrier
  - 22.5% Two carriers
  - 15.6% Three carriers
  - 05.8% Four carriers
  - 02.9% Five or more carriers
  
2. Contractual agreements are held by your company for the transportation/handling of... (circle appropriate response to each question)
  - 23.8% Products
  - 12.2% Exhibits
  - 93.0% Employee relocations
  - 10.4% General commodities
  - 19.1% Computers and/or office equipment
  
3. If your company entered into a contract carriage agreement during 1998, what was the primary reason?
  - 61.0% Did not enter into a contract carriage agreement
  - 12.9% Cost
  - 15.5% Service
  - 03.2% Reliability
  - 00.0% Claims processing
  - 03.8% Value added services
  - 03.2% Other
  
4. Of these carriers under contract, does your company specify which carriers are preferred?
  - 61.3% Yes
  - 38.6% No
  
5. In terms of evaluation, what has been your company's experience with such contract carriage arrangements?
  - 43.0% Excellent
  - 54.3% Good
  - 02.6% Fair
  - 00.0% Poor

## RESULTS



1999  
Survey Of  
Corporate  
Relocation  
Policies

- 6. If your company outsourced relocation services in 1998, the primary reason was to...?
  - 20.8% Save time
  - 08.3% Hire a specialist
  - 25.0% Save administrative costs/burdens
  - 04.1% Downsize staff
  - 31.2% Gain better service to employees
  - 10.4% Other
  
- 7. Did your company use the services of a relocation service or a brokerage firm in 1998; and if so, which services did it provide? (check each applicable response)
  - 52.7% Did not use a relocation service or brokerage firm in 1998
  - 20.8% Counseling about the planning and details of moving
  - 17.1% Counseling about company policy
  - 44.1% Real estate sale and purchase
  - 20.2% Orientation tours in the new location
  - 20.2% Arrangement of family's transportation and accommodations
  - 20.8% Contract of household goods moving company
  - 14.1% Audit and/or payment of invoice
  - 15.9% Monitoring of shipment
  - 12.8% Assistance with employee claims preparation and submission
  - 06.7% Supplementary services (appliances, cleaning, etc.)
  
- 8. Rank the following in terms of carrier selection ("1" for the most important, through "5" for the least important).
  - 1 Service
  - 2 Price
  - 5 Claims processing
  - 3 Reputation
  - 4 Local agent(s)
  
- 9. Rank the following in terms of carrier evaluation ("1" for the most important, through "6" for the least important).
  - 2 Service
  - 3 Employee feedback
  - 6 Claims processing
  - 4 Price
  - 5 On-time delivery
  - 1 Extra services
  
- 10. From your relocating employees' perspectives, rank the following parts or aspects of a move in terms of importance ("1" for the most important, through "5" for the least important).
  - 1 Salesperson/origin agent
  - 2 Packer
  - 4 Driver
  - 3 Destination agent
  - 5 Claims processing in the event of loss or damage
  
- 11. When comparing the van line service you received in 1998 to that received in 1997, would you say that van line service in 1998 was:
  - 13.5% Better than 1997
  - 02.7% Worse than 1997
  - 83.6% About the same as 1997
  
- 12. Which of the following does your company utilize? (check each applicable response)
  - 57.8% Electronic transfer of funds to your carrier for relocation costs
  - 23.6% On-line registration access with your carrier
  - 31.5% On-line access with your carrier for shipment records/history

Part I — International

**To be completed only if your company performed any international relocations during 1998.**

1. Approximately how many international employee relocations was your company responsible for in 1998?
  - 68.1% 1-9
  - 09.8% 10-19
  - 08.7% 20-49
  - 04.3% 50-99
  - 02.1% 100-199
  - 06.5% More than 200
  
2. Compared to 1998, do you estimate the number of employees your company will relocate internationally during 1999 will...?
  - 33.6% Increase
  - 14.7% Decrease
  - 51.5% Remain about the same
  
3. Comparing your relocation policy to your domestic relocation policy, does your company's international relocation policy offer...
  - 41.8% No difference between international and domestic relocation policies?
  - 76.7% Additional tax considerations?
  - 55.8% Allowances for children to attend certain schools?
  - 55.8% Additional leave time?
  - 11.6% More leniency on who is covered? (i.e., unmarried partners, parents, day-care providers)
  - 63.9% Additional leave time that includes travel and at least one visit back to the U.S./Canada?
  - 60.4% Increased allowances for permanent storage?
  - 37.2% Extended per diem charges for hotel?
  - 27.9% Other?
  
4. Which is your primary contact for international relocations?
  - 18.2% Van line
  - 35.3% Van line agent
  - 21.9% International forwarder
  - 19.5% Third party
  - 04.8% Other
  
5. Rank the following for international carrier selection ("1" for the most important, through "4" for the least important).
  - 1 Service
  - 2 Price
  - 4 Third Party
  - 3 Reputation
  
6. Rank the following guidelines for international carrier evaluation ("1" for the most important, through "6" for the least important).
  - 1 Service
  - 2 Employee Feedback
  - 5 Claims Processing
  - 4 Price
  - 3 On-Time Delivery
  - 6 Extra Services
  
7. Does your company utilize Electronic Data Interchange (EDI) interface capabilities on international shipments?
  - 80.2% Never
  - 12.3% Seldom
  - 07.4% Frequently
  - 00.0% Always

RESULTS

**Please continue on the back cover...**



1999  
Survey Of  
Corporate  
Relocation  
Policies

- 8. Apart from the physical handling of personal belongings, do you believe that the International Household Goods Forwarding Industry provides sufficient service in these areas of the relocation process...(circle appropriate response to each area)
  - 32.6% Visa and document services?
  - 38.4% Travel services?
  - 23.0% Schooling and education?
  - 30.7% Cultural indoctrination?
  - 26.9% Auto rentals/leases?
  - 19.2% Legal and financial indoctrination?
  - 09.6% Other
  
- 9. To which continent were the majority of your international relocations destined in 1998?
  - 48.0% Europe
  - 16.0% Asia
  - 00.0% Africa
  - 25.3% North America
  - 05.3% South America
  - 05.3% Australia
  - 00.0% Antarctica
  
- 10. From which continent were the majority of your international relocations originating in 1998?
  - 36.1% Europe
  - 07.2% Asia
  - 02.4% Africa
  - 53.0% North America
  - 01.2% South America
  - 00.0% Australia
  - 00.0% Antarctica
  
- 11. How does your company assist an internationally relocated employee's spouse in finding employment in the new location?
  - 85.7% No assistance
  - 10.3% Pay job-finder's fee
  - 01.2% Find employment within the company
  - 02.5% Find employment outside the company
  - 00.0% Pay spouse's full or partial salary until hired
  
- 12. What job placement assistance does your company offer the "partner" or "significant other" of an unmarried transferee?
  - 97.0% No job placement assistance
  - 01.4% Same as spousal assistance
  - 01.4% Other
  
- 13. How many times in 1998 did an employee utilize your spousal, or partner, employment assistance?
  - 97.0% 0-9
  - 01.4% 10-19
  - 01.4% 20-49
  - 00.0% 50-99
  - 00.0% 100-199
  - 00.0% 200 or more
  
- 14. Of the international relocations that failed or were declined in 1998, the majority cited...
  - 68.5% None were failed or declined
  - 00.0% Lack of spousal/partner assistance
  - 15.7% Lack of adaptability by the employee
  - 07.1% Lack of adaptability by the spouse/partner
  - 08.5% Other

