



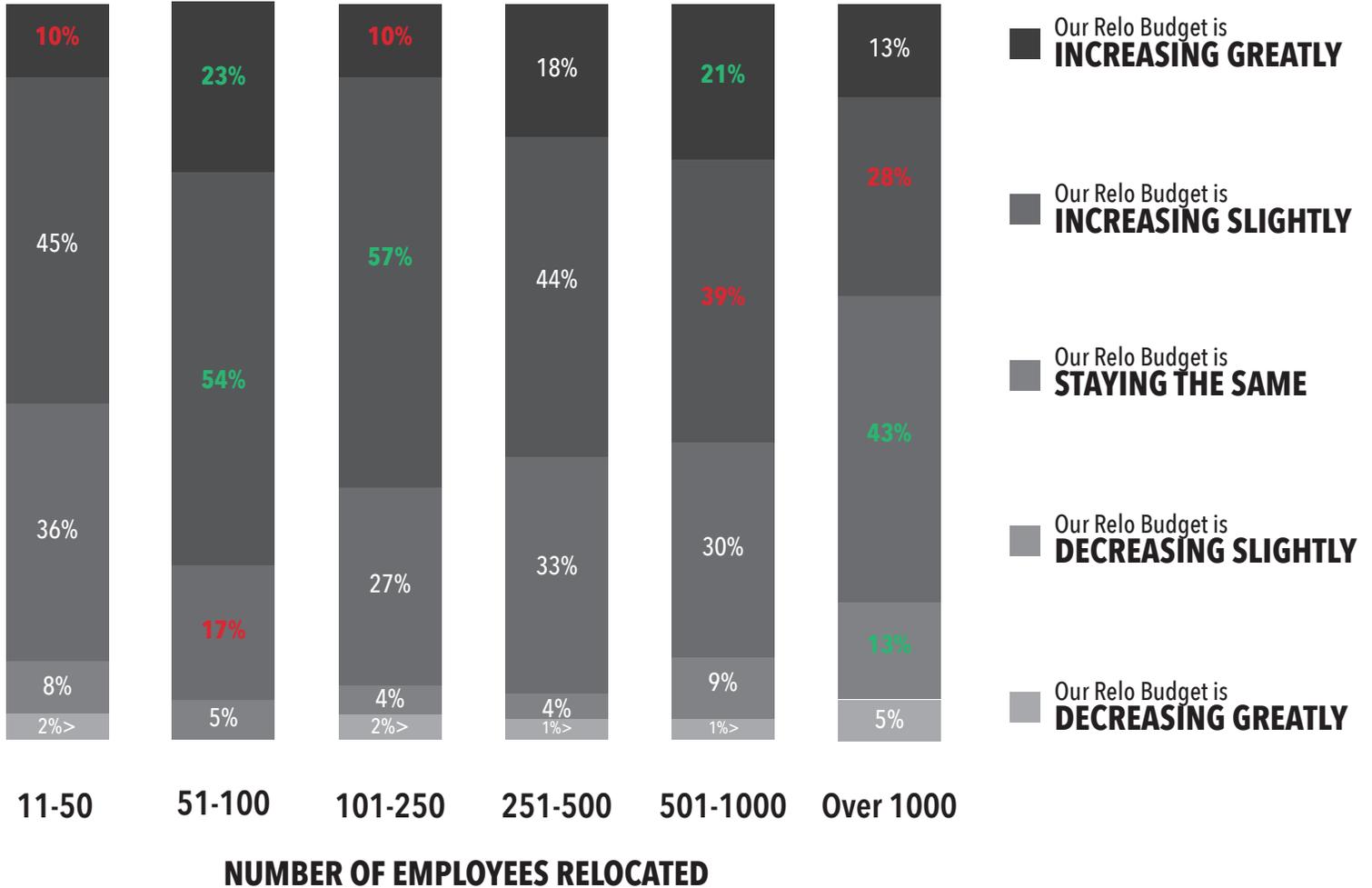
CORPORATE MOBILITY TODAY:
How Companies Are Purchasing
Moving and Relocation Services

CORPORATE RELOCATION NEEDS ARE GROWING FOR MANY COMPANIES IN THE U.S.

Recent research conducted with 578 decision makers at Fortune 1000 companies by Seymour Insights, an independent third party research firm, offers insight into how mobility executives in a wide cross-section of industries define their relocation services needs and identify the best service provider to meet them. For procurement and human resource (HR) professionals who are considering corporate relocation services providers, this research can illuminate and inform their decision-making process.

The survey identified that for companies across most industries, **more than half indicated their budget for corporate relocation will increase in the upcoming year**. Consistent with that budget outlook, **over a third of respondents say moving and relocation needs at their company are increasing** over the next year, especially at companies moving 51-250 employees per year and spending between \$50,000 to \$2 million on relocation.

RELOCATION BUDGET TRENDS



We suspect that companies whose relocation budgets are shrinking are becoming more open to the idea of recruiting remote employees. Thanks to the advances in technology and online collaboration tools like GoTo Meeting, Slack, and Cisco Spark, this is a trend we will pay attention to in the future.

SURVEY RESULTS RECAP

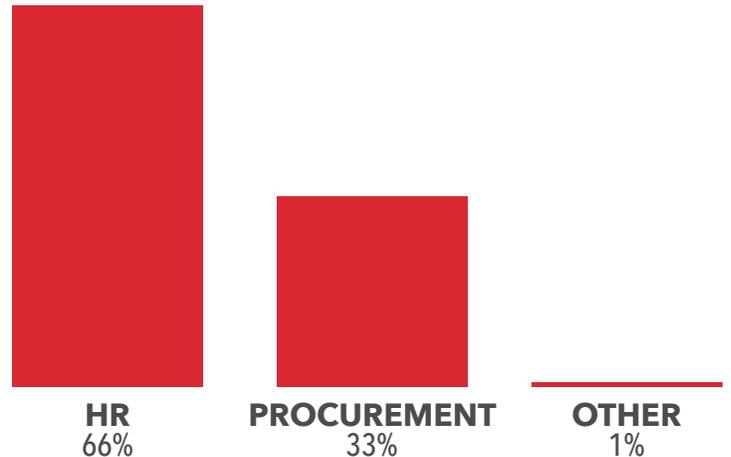
UNDERSTANDING DECISION-MAKING DRIVERS

The participants in the corporate relocation research can be better understood by examining their demographic and psychographic characteristics.

All the executives surveyed were managers or above. Thirty percent work in the procurement function, while the remaining 70 percent work in HR. Industries represented include:

1. Accommodation and Food Services
2. Construction
3. Educational Services
4. Finance and Insurance
5. Government
6. Health Care and Social Assistance
7. Information
8. Management of Companies and Enterprises
9. Manufacturing
10. Mining, Quarrying, and Oil and Gas Extraction
11. Professional, Scientific, and Technical Services
12. Retail/Wholesale Trade
13. Transportation and Warehousing
14. Utilities

RELO POINT OF CONTACT



	TOTAL	MANAGER	DIRECTOR	V. PRESIDENT	C - LEVEL
HR	66%	69%	67%	41%	17%
PROCUREMENT	33%	31%	32%	56%	67%
OTHER	1%	0%	1%	3%	17%



Researchers analyzed motivational attitudes and decision-making drivers among survey respondents and found most decisions were tied to **time, budget, and resources** allocated to mobility services, and desired level of partners assistance; findings indicate that a preference by executives to purchase moving services directly versus as part of a bundled offering does not necessarily directly correspond to company size, budget or volume of annual relocation activities.

Additionally, researchers probed several attitudes towards and perceived **benefits of moving and relocation services providers** among respondents. The top 15 were:

1. Capacity growth
2. Understands client company's industry
3. Consultative approach to moving needs
4. Proven national and international moving experience, along with local and interstate solutions
5. Adjusts to client company's policies
6. Turnkey services
7. Understands relocation budgets
8. Fits client company's culture
9. Real time access to documents for transferees and reporting on relocation activities for HR
10. Background checks drivers and crew who interact with transferees
11. Accurate and competitive pricing
12. Integration with a relocation management company
13. Moving/relocation industry thought leader
14. Recognized, established brand and strong financial history
15. Presence near my corporate location(s)

With this ranking, participating respondents demonstrated that, while pricing matters, the **ability to understand and meet their company's needs**, and **quality of service to transferees are more important qualities when choosing a relocation services partner.**

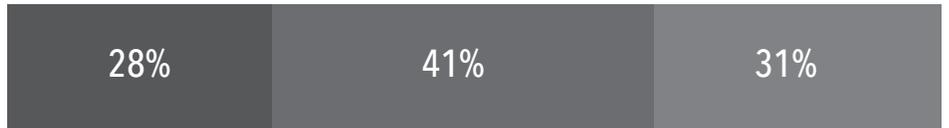


EVALUATING MOVING SERVICES

Locally owned and operated moving company that is part of a national and / or global brand network



Moving company owned by a relocation company

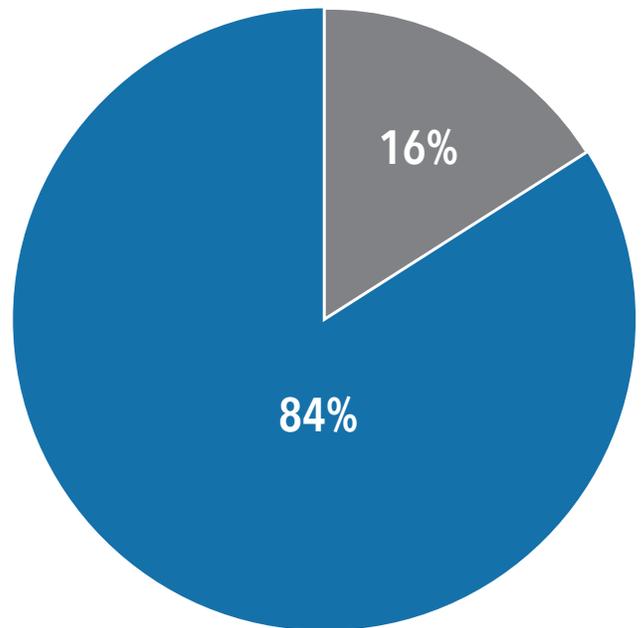


Locally owned and operated moving company



■ RANK 1 ■ RANK 2 ■ RANK 3

When corporate decision makers evaluate moving services, their **clear priority is finding a company that is locally owned and is affiliated with a national or international van line.** This indicates the importance mobility executives place on the ability of moving services providers to meet their needs as seen with the ranking of the top 15 benefit statements. Capabilities far outweigh reputation or name recognition in the process of choosing a corporate relocation partner, with 84 percent of respondents citing affiliation with a national or international network as a primary driver of consideration versus only 16 percent more interested in the local reputation of moving services companies.



■ AFFILIATION WITH A NATIONAL OR GLOBAL VAN LINE IS MORE IMPORTANT
■ THE REPUTATION OF THE LOCAL MOVER IS MORE IMPORTANT

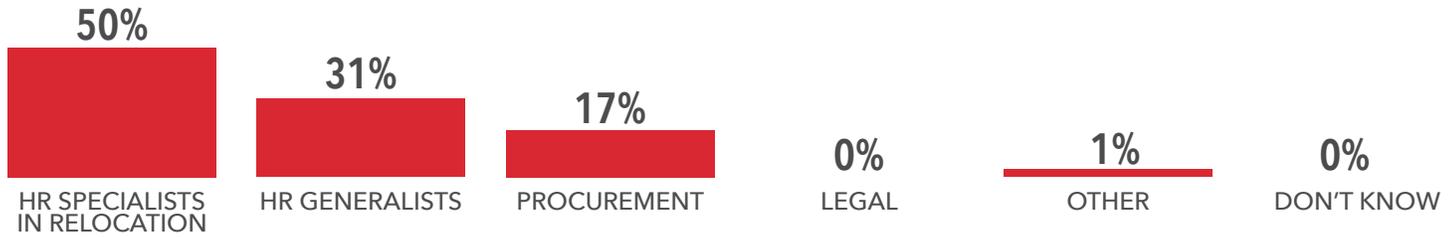
ANOTHER WAY THESE RESEARCH RESULTS CAN PROVIDE GUIDANCE to HR and procurement executives tasked with selecting a corporate relocation services provider is to look at the considerations of highly-involved respondents with the largest budgets for relocating employees.

Smaller companies are less likely to perceive differences between service providers. Conversely, larger companies that move more employees are more likely to notice variations. Executives from smaller companies who seek to identify a moving services partner can benefit from the insight offered by their larger company counterparts and evaluate vendors on factors beyond bottom-line price and name recognition.

Of the top 5 full service moving and relocation brands, 60% had less than average satisfactory scores. This suggests HR and Procurement professionals should focus on finding companies that will meet all of their attitudes and motivational drivers mentioned on page 3.



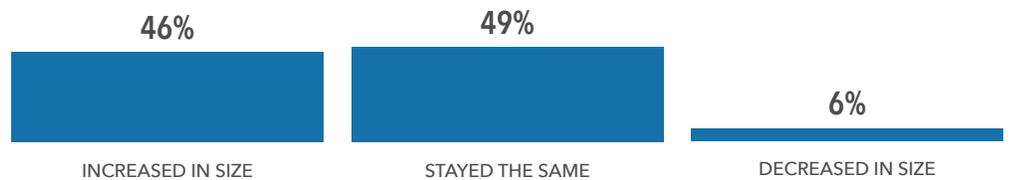
WHO DECIDES



Q16 - Which best describes the primary make-up of your company's mobility team? Caution: *Small base size (n<30)

The role of the decision maker in a company likely influences their perspective on and attitudes towards evaluating moving services providers. This cross-industry research found that **more than 75 percent of the team members tasked with employee mobility services work in HR functions**. Seventeen percent are procurement executives, with the remainder spread across legal and other departments.

MOBILITY TEAM GROWTH



	TOTAL	COMPANY REVENUE				NUMBER OF EMPLOYEES					OPERATING LOCATIONS	
		<\$251 M	\$251M - \$500M	\$501M - \$1B	MORE THAN \$1B	<1,000	1,000-4,999	5,000-9,999	10,000-14,999	15,000 OR MORE	DOMESTIC	GLOBAL
INCREASED	46%	15%	29%	41%	54%	18%	45%	55%	53%	53%	30%	53%
STAYED THE SAME	49%	76%	63%	58%	40%	74%	53%	40%	40%	38%	65%	41%
DECREASED	6%	8%	8%	1%	6%	8%	2%	4%	7%	9%	4%	6%

Human resources professionals are focused on achieving strong outcomes in measures such as employee satisfaction and retention, whereas procurement staff are more likely to be evaluated on cost containment results. That **HR team members are the clear majority of corporate relocation services decision makers** probably accounts for the emphasis on capabilities and service to transferees in choosing moving services partners.

Additionally, only six percent of respondents across all industries indicated that their mobility services teams were shrinking. The remaining 94 percent are expected to remain the same size or grow, indicating the **increasing demand for corporate relocation services**.

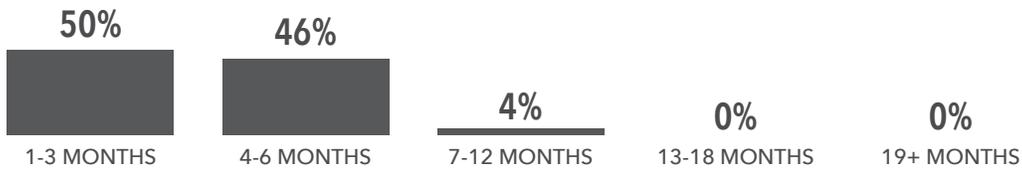
By understanding who makes the decision of choosing a partner for handling their company's relocation needs, professionals seeking to identify a moving services vendor can find valuable guidance in these results. Mid-sized to small companies in particular can benefit from the insight and experience of larger companies that handle more moves. **Seeing the value large companies place on capabilities, services, and customer satisfaction ahead of price and brand familiarity can enable decision makers at small to mid-sized companies to make more nuanced, and ultimately better, choices when identifying a moving services partner.**

HOW DECISIONS ARE MADE

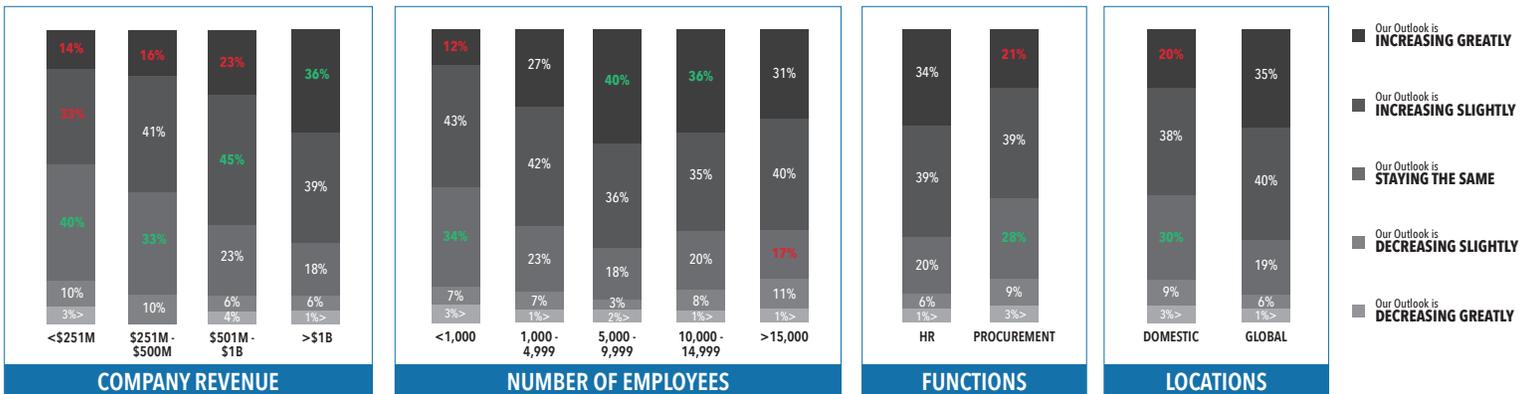
Another way to understand the process of choosing a corporate relocation services provider is to look at how the decision is made in addition to who makes it. The time spent evaluating information about partners, as well as the source of the information, offer guidance and insight into the decision-making process.

Companies of all sizes give considerable time to evaluating potential partners. Virtually all firms reported spending one to six months deciding which firms to invite to the RFP (request for proposal) process to select a corporate relocation services provider. During that time, there are four primary sources of

gathering information to inform decision makers' choices. Two come from the service provider's website and sales materials. The other two sources come from people— both vendor employees such as account managers or sales representatives, as well as recommendations from decision makers' colleagues. The findings illustrate **the importance of careful consideration of multiple information sources over time.** This process offers better outcomes than rushed choices based on superficial indicators.



	COMPANY REVENUE					NUMBER OF EMPLOYEES					OPERATING LOCATIONS	
	TOTAL	<\$251 M	\$251M - \$500M	\$501M - \$1B	MORE THAN \$1B	<1,000	1,000-4,999	5,000-9,999	10,000-14,999	15,000 OR MORE	DOMESTIC	GLOBAL
1-3 MONTHS	50%	53%	51%	55%	48%	53%	53%	45%	54%	42%	53%	48%
4-6 MONTHS	46%	43%	43%	42%	47%	44%	45%	49%	40%	51%	44%	46%
7-12 MONTHS	4%	4%	4%	3%	5%	3%	1%	6%	6%	6%	3%	5%
13-18 MONTHS	0%	-	-	-	-	-	-	-	-	-	-	-
19+ MONTHS	0%	-	2%	-	0%	-	1%	-	-	1%	-	1%



PUTTING RESEARCH INTO PRACTICE

Clearly there are many factors that go into choosing a corporate relocation services provider. Team members from different departments including HR, procurement, legal, and finance are often involved in the selection of a company's moving and relocation services providers. When selecting a vendor partner, it can be tempting to take the easy path of picking a name brand that offers the lowest price. However, **this extensive research into the roles, attitudes, and processes of professionals who take part in the decision-making process offers guidance into best practices from companies in diverse industries.**

In a competitive business world, success depends on many factors including strong budget management, effective talent recruitment and retention, and efficient service provider partnerships that best meet company needs. Decision makers can make stronger choices when selecting their company's corporate relocation services provider when armed with a complete understanding of the decision-making process of professionals tasked with managing and delivering moving services.



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