

INDUSTRY FACT SHEET

America's moving and storage industry is one of the most complex and diverse collections of businesses in the country. It consists of multi-million dollar companies and multi-thousand dollar ones; of large corporate organizations and "mom-and-pop" operations; of chief executive officers working in corporate suites and independent business people working in their trucks; and of van lines, their agency systems and independent movers. America's moving and storage industry is as diverse as the country itself.

We are the industry's national trade group and represent all facets of the industry: agents, forwarders, independent carriers, international movers, suppliers and van lines.

AMSA offers the most complete membership services in the industry, including state and federal advocacy, legal and tax assistance, publications, education programs, tariff services, financial and statistical data gathering, and arbitration.

OUR INDUSTRY

Consists of 7,000 companies operating at 13,900 locations primarily providing moving and storage services for household and office goods

Includes van lines, van line agents, independent full-service movers, international movers, forwarders, and auto transporters

Employs 122,600 people with an annual payroll of \$3.6 billion

Is composed of mostly small businesses:

47.8% of industry companies employ fewer than 5 people.

Only 8.5% of industry companies employ 100 or more people.

AMSA members report operating a fleet of 50,000 trucks (32,000 tractor units for pulling semi-trailers and 18,000 straight trucks) regulated by the U.S. Department of Transportation and state motor vehicle agencies.

If services are conducted across state lines, the firm must be licensed by the Federal Motor Carrier Safety Administration. Professional movers may also be under the jurisdiction of state regulatory agencies.

AMSA consists of more than 4,100 member companies, including 250 companies in 85 countries outside the U.S. and 214 companies in the industry's supply chain. AMSA is affiliated with a network of 27 state moving associations.

OUR SERVICES

Include local and long-distance transportation of household and office goods; warehousing and storage services; packing and packaging services; process, distribution, and logistics consulting; merchandise sales and other services.

Industry revenue from these services totals more than \$12.6 billion annually. The following three areas combined account for 97.3% of revenue:

69.6% from local or long-distance transportation service

20.2% from warehousing and storage services

7.5% from packing and packaging services

Interstate shipments by type, percentage (2011 AMSA):

Household goods: 66% (including 15% military and 1% other federal government)

Computers, copiers and other electronic office equipment: 26%

Exhibits and trade shows: 7%

Office and institutional: 1% (mostly local moves)

Breakdown of household goods shipments by type (2011 AMSA):

Individuals: 34%

Corporate: 41%

Military: 23%

Other federal government: 2%

Interstate household goods moves, annual number: 3 million (Census estimate for 2007)

by professional movers: 800,000

by consumer with rented truck: one million

by consumer unassisted: 1.2 million

Reasons for move (US Census Geographic Mobility for 2007)

Larger/better home - 30.50%

Establish own home - 16.90%

Closer to work/school - 13.40%

New job/transfer - 12.80%

Family related - 10.60%

Lower maintenance - 7.00%

Renter to owner - 6.60%

Financial/employment - 6.20%

Loss of spouse - 3.00%

Ten most active states - inbound household goods (2011 AMSA)

1. Alaska - 59% of shipments inbound
2. Oregon - 58%
3. Vermont - 57%
4. Texas - 56%
5. North Carolina - 55%
6. South Carolina - 55%
7. Colorado - 55%
8. Tennessee - 54%
9. District of Columbia - 54%
10. Florida - 53%

Ten most active states - outbound household goods (2011 AMSA)

1. New Jersey - 60% of shipments outbound
2. Illinois - 59%
3. New York - 58%
4. Michigan - 58%
5. Kansas - 57%
6. Ohio - 56%
7. Indiana - 55%
8. Pennsylvania - 55%
9. Connecticut - 55%
10. Wisconsin - 54%

OUR MARKET

Americans who move, annual percentage: 12.5% (US Census estimate for 2009)

Americans who move, annual number: 37.1 million, or 15.8 million households @ 2.34 persons

per household (US Census estimates for 2009)

Of all Americans (297,182,000):

10.5% moved within the same state (31,385,000)

1.56% moved to a different state (4,660,000)

0.36% moved from the US to another country (1,087,000)

Of Americans who moved (37,105,000):

84.5% moved within the same state

12.5% moved to a different state

2.92% moved from the US to another country

Reason for moving (US Census questionnaire for 2009)

Wanted new or better home/apartment - 14.5%

Other family reason - 11.5%

Wanted cheaper housing - 11.1%

Other housing reason - 9.7%

To establish own household - 9.5%

New job or transfer - 8.7%

Wanted own home, not rent - 5.5%

Change in marital status - 5.4%

To be closer to work/easier commute - 5.05%

Wanted better neighborhood/less crime - 5.04%

Other reasons - 4.8%

To look for work or lost job - 2.7%

To attend or leave college - 2.6%

Health reasons - 1.6%

Other job related reason - 1.0%

Change of climate - 0.5%

Retired - 0.4%

Natural disaster - 0.36%

Average cost of an interstate household move: About \$4,300, based on an average weight of 7,400 pounds and average distance of 1,225 miles (2009) and including packing and other services that might be needed.

Average cost of an intrastate household move: About \$2,300, based on an average weight of 7,400 pounds and a crew of a crew of four (driver + three) at an approximate rate of \$200 per hour (2009).

Moves without claim, percentage: More than 80% of all moves have no claim filed (consistent for more than a decade - has been as high as 82%), and almost all (99.99%) claims are resolved before arbitration. Filed claims can include customer-packed shipments which may have contributed to damages.

Top five tips for a successful move:

1. Be wary of phone or Internet estimates. Get three written in-home estimates and show the mover everything, including items in attics, basements, garages, storage areas, sheds, etc. Typically, two of the estimates will be close in price, weight, and service. Select one of those; movers with unusually high or low bids should generally be avoided.
2. Be wary of carriers seeking large down payments to hold dates or to reserve service.
3. Ask questions! The moving business can be complex and has its own jargon. If you aren't satisfied with the answers, or if the mover hesitates when you ask for clarification, talk to another company.
4. For interstate shipments, obtain and read the required "pre-move" documents from your carrier: Your Rights and Responsibilities, Ready to Move, and information on the arbitration program that the carrier participates in.
5. Make sure your mover is a ProMover. Find out more at www.moving.org.

