

WINTER 2009

# industry trends

A QUARTERLY DATA  
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AMERICAN MOVING &  
STORAGE ASSOCIATION

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# industry trends

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Welcome to the inaugural issue of *Industry Trends*, the only regular statistical report covering the domestic moving and storage industry. Published quarterly, the report provides an overview of current trends and business activity within the sector, and offers data on shipment volume, both aggregate and regional; demand factors; timing; inbound/outbound data; and market-specific trends and outlooks. Most data is based on information submitted confidentially to AMSA by its members.

*Industry Trends* provides subscribers with the most comprehensive look at this \$16.5 billion industry available each quarter.

*Industry Trends* is published quarterly by the American Moving & Storage Association. The publication is available on a subscription basis for \$275 for members and \$550 for nonmembers. Information provided in this publication cannot be reproduced without the express permission of AMSA. For more information, contact Scott Michael, Vice President of Vice President of Military and Government Relations and Advisor to the President, at [smichael@moving.org](mailto:smichael@moving.org).

AMSA, 2009



## introducing industry trends

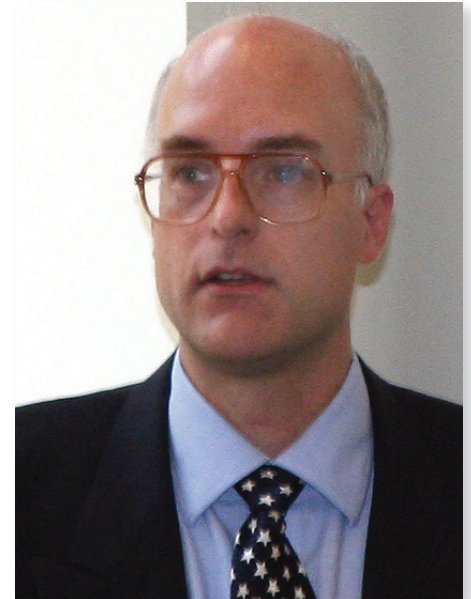
Welcome to the inaugural edition of *Industry Trends*, AMSA's new quarterly report that highlights trends in the moving and storage industry and provides useful information to help business leaders plan for the future. We welcome your comments and suggestions!

Each edition will feature a variety of industry-related data from organizations such as the National Association of Realtors, the National Association of Home Builders, Worldwide ERC, and others that represent related industries. Periodically, economic forecasting information will be included.

Additionally, please note that *Industry Trends* is a work in progress. We are expanding our data collection capacity by including more carriers and collecting data on a broader range of topics. This inaugural edition is intended to put 2007 and 2008 data in perspective for the reader as juxtaposed to historical data. Future editions will feature more current data.

Much of the shipment information contained in these reports is derived from data furnished by a group of carriers who participate in our data studies. While we are confident this data is representative of the industry as a whole, the raw shipment counts do not equal the total of all household goods shipments handled by the entire moving and storage industry. The actual shipment totals will be larger than the numbers contained herein.

**Scott Michael**  
*Vice President of Military and Government Relations and Advisor to the President*



# shipment volume

**A** comparison of household goods shipment volume for the past three years, based on AMSA continuing data studies, shows that for the full year of 2008, total household goods (first proviso) traffic was reported 10% lower than for the year of 2007. All segments, with the exception of interline traffic, were below 2007 levels, with the private transferee (COD) market down a significant 17.7%.

Trending over the past three years shows a similar decline in volume since 2005, with year-over-year volume for total traffic reported down 8.5% in 2007 and down 5.7% in 2006. These downturns reflect the state of the housing market over the same time period, as the private transferee (COD) sector has suffered significantly.

After two years of double-digit losses, in part due to changes in the way individual carriers reported interline shipments, the military sector almost broke even in 2008. AMSA expects growth in this sector as additional troops are brought home from Iraq, though deployments in Afghanistan are expected to increase. Typically, the military will reassign soldiers to a new duty station within a few months of returning stateside.

## Comparison of Shipment Volume Year to Year Based on Pickup Date

| Traffic Type                | Full Year 2008 Compared to Full Year 2007 | Full Year 2007 Compared to Full Year 2006 | Full Year 2006 Compared to Full Year 2005 |
|-----------------------------|---|---|---|
| Corporate Account-NAC       | -8.7%                                     | -6.8%                                     | -1.9%                                     |
| Private Transferee-COD      | -17.7%                                    | -11.3%                                    | -9.7%                                     |
| General Services Admin-GSA  | -7.0%                                     | -4.2%                                     | <b>4.7%</b>                               |
| Military                    | -1.3%                                     | -14.5%                                    | -13.6%                                    |
| Interline-409               | <b>11.3%</b>                              | <b>3.8%</b>                               | <b>7.4%</b>                               |
| Total First Proviso Traffic | -10.0%                                    | -8.5%                                     | -5.7%                                     |

**KEY:** ■ worst year in comparison ■ average year in comparison ■ best year in comparison

*Based on data provided by AMSA study carriers*

# factors affecting demand for moving services

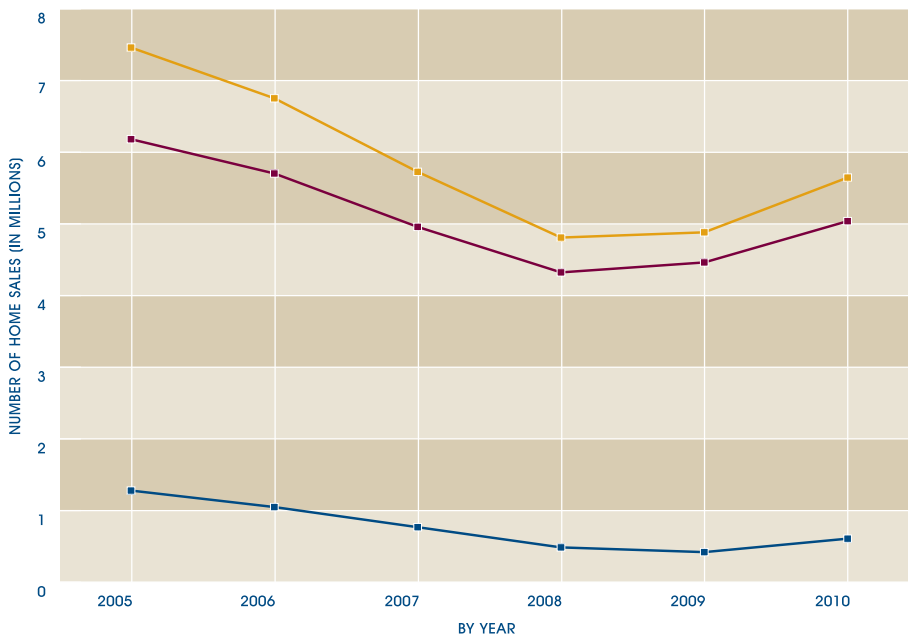
The table below shows housing sales for both new and existing single-family homes. Home sales obviously have a strong correlation with moves, and the National Association of Home Builders (NAHB) reported increasingly large declines in home sales over the past three years. These mirror the downward trend in household goods shipment volume shown in the table above.

NAHB is projecting home sales to basically level off in 2009 and start to increase again in 2010, although the projected 45% increase in new home sales in 2010 may be somewhat wishful thinking.

High unemployment rates in many areas have contributed to the worsening moving numbers as well, with the highest jobless areas being in California, Arizona, Indiana, Virginia and Michigan; all with communities which faced unemployment rates above 12% in 2008.

The ten worst real estate markets forecast by the S&P/ Case-Shiller Home Price Indices are also highly concentrated in California, which has eight of the ten worst markets where the fall in home prices is expected to be 20% to 25%. Real estate sales, unemployment and consumer spending are all leading indicators for the moving industry.

## Housing Sales Comparisons and Projections by Year



**KEY:** ■ New single-family sales ■ Existing single-family sales ■ Total Sales

Data are in millions of home sales  
Source: National Association of Home Builders

## Highest Unemployment Rates by Area

| Area         | 08 rate |
|--------------|---------|
| El Centro CA | 22.5%   |
| Yuma AZ      | 18.5%   |
| Yuba City CA | 14.2%   |
| Merced CA    | 14.0%   |
| Modesto CA   | 12.7%   |
| Visalia CA   | 12.6%   |
| Elkhart IN   | 12.3%   |
| Danville VA  | 12.3%   |
| Fresno CA    | 12.2%   |
| Flint MI     | 12.1%   |

Source: BLS

## 10 Worst Real Estate Markets for 2009

| Area           | 2008 Median Home Price | 2009 Change Projected |
|----------------|------------------------|-----------------------|
| Los Angeles CA | \$375,340              | -24.9%                |
| Stockton CA    | \$248,050              | -24.7%                |
| Riverside CA   | \$256,540              | -23.3%                |
| Miami FL       | \$293,590              | -22.8%                |
| Sacramento CA  | \$225,140              | -22.2%                |
| Santa Ana CA   | \$532,810              | -22.0%                |
| Fresno CA      | \$257,170              | -21.6%                |
| San Diego CA   | \$412,490              | -21.1%                |
| Bakersfield CA | \$227,270              | -20.9%                |
| Washington DC  | \$343,160              | -19.9%                |

Source: S&P Case-Shiller national home-price index

# detailed shipment summary

The 2007 shipment summary shows a significant decrease in individual (COD) shipments over the past three years, from more than 300,000 to only 225,000 shipments, with the percentage dropping from 48.9% to 43.7% of total household goods shipments. Compared to 1999, however, when COD shipments made up 44% of the total, it appears that this may be a more typical proportion of the shipments.

From 1999 to 2004, there was essentially no change in the total number of COD shipments, at just over 300,000. In those years, the big story was the drop in corporate account shipments, from nearly 300,000 to just over 200,000. In fact, by 2004, account shipments made up only 33% of the total. Since 2004, account shipments have held steady at around 200,000, but their fraction of the total market has rebounded to 38.7% due to the overall decline in the number of shipments available.

Due to changes in reporting by carriers in the past few years, many military shipments that used to be reported as interline or 409 shipments are now reported as military. If the two categories are combined, the military's percentage of the total remains steady at 16.2% for 2007 (as well as 2004). This is up from 13% in 1999, as the larger van lines participating in this study have aggressively targeted military shipments to replace losses in other market sectors.

As a whole, average shipment weight continues to increase marginally each year, as customers continue to acquire more possessions despite the flagging economy.

## Shipment Summary

|                                       | 2007                |                         |                       |                      | 2004                |                         |                       |                      | 1999                |                         |                       |                      |
|---------------------------------------|---------------------|-------------------------|-----------------------|----------------------|---------------------|-------------------------|-----------------------|----------------------|---------------------|-------------------------|-----------------------|----------------------|
|                                       | Number of Shipments | Shipments as % of total | Average Billed Weight | Average Billed Miles | Number of Shipments | Shipments as % of total | Average Billed Weight | Average Billed Miles | Number of Shipments | Shipments as % of total | Average Billed Weight | Average Billed Miles |
| Corporate accounts (NAC)              | 199,994             | 38.7                    | 9,996                 | 1,062                | 208,392             | 33.5                    | 9,863                 | 1,118                | 290,888             | 41.6                    | 9,453                 | 1,090                |
| Individuals (COD)                     | 225,930             | 43.7                    | 7,198                 | 1,217                | 304,611             | 48.9                    | 7,121                 | 1,261                | 307,658             | 44.0                    | 6,497                 | 1,256                |
| Military                              | 75,648              | 14.6                    | 6,679                 | 1,261                | 58,030              | 9.3                     | 6,916                 | 1,251                | 57,092              | 8.2                     | 6,679                 | 1,211                |
| GSA (General Services Administration) | 6,719               | 1.3                     | 9,122                 | 1,086                | 8,823               | 1.4                     | 8,761                 | 1,119                | 8,626               | 1.2                     | 8,343                 | 1,114                |
| Interline (409)                       | 8,341               | 1.6                     | 6,969                 | 1,215                | 43,075              | 6.9                     | 6,561                 | 1,233                | 35,371              | 5.1                     | 6,066                 | 1,300                |
| Total First Proviso Traffic (above)   | 516,632             | 100.0                   | 8,227                 | 1,161                | 622,931             | 100.0                   | 8,004                 | 1,208                | 699,635             | 100.0                   | 7,742                 | 1,184                |

Based on data provided by AMSA study carriers

# regional shipment information

The 2007 report of shipment weights by region shows that the Central and Great Lakes regions continue to have the heaviest shipments on average, with New England and the West Coast having the smallest average shipment weights. The Southeast and Southwest regions have similar average weights for corporate shipments as the top regions, but their overall average is dragged down by shipments from other market segments. The Mid-Atlantic region boasts significantly heavier military shipments than other regions, presumably due to a concentration of high-ranking officers in the Washington DC metropolitan area. 2004 was selected as a comparative year because that year was not significantly impacted by the recent downturn in the housing market.

## Average Shipment Weights by Destination Region Comparing Year 2004 to Year 2007

|  | 2007 | N England | M Atlantic | G Lakes | Central | Southeast | Southwest | West  | All Areas |
|--|------|-----------|------------|---------|---------|-----------|-----------|-------|-----------|
| <b>Corporate accounts (NAC)</b>              |      | 8,651     | 9,425      | 10,840  | 10,935  | 10,792    | 10,401    | 8,838 | 9,996     |
| <b>Individuals (COD)</b>                     |      | 6,085     | 6,781      | 6,952   | 7,750   | 7,705     | 7,589     | 6,883 | 7,198     |
| <b>Military</b>                              |      | 6,334     | 7,357      | 6,789   | 6,918   | 6,719     | 6,410     | 6,257 | 6,679     |
| <b>GSA (General Services Administration)</b> |      | 7,912     | 7,388      | 8,809   | 10,730  | 10,026    | 10,093    | 9,595 | 9,122     |
| <b>Interline (409)</b>                       |      | 6,833     | 7,461      | 7,296   | 7,088   | 7,075     | 6,697     | 6,482 | 6,969     |
| <b>Total First Proviso Traffic (above)</b>   |      | 7,230     | 7,976      | 8,938   | 9,006   | 8,580     | 8,461     | 7,546 | 8,227     |

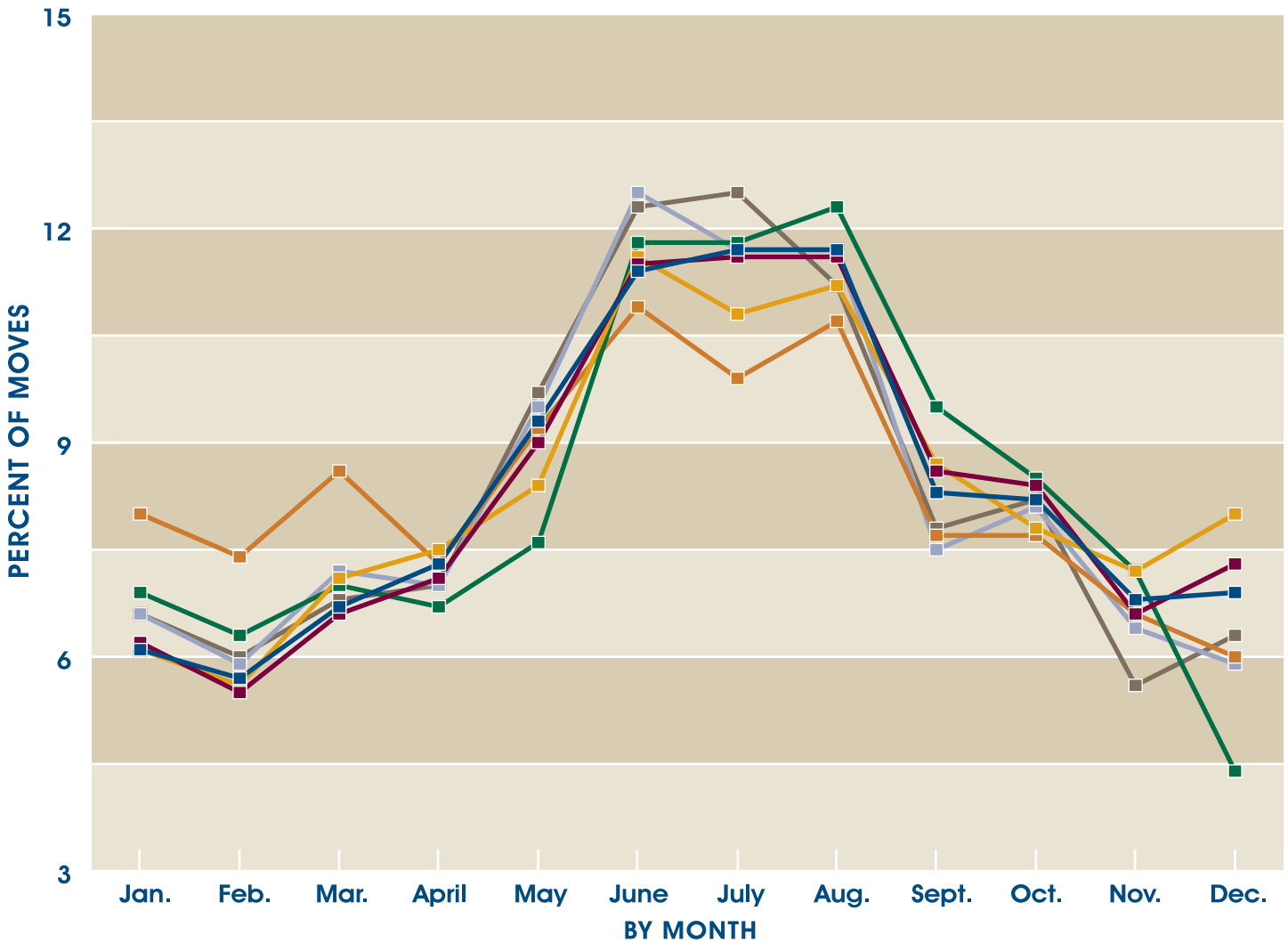
|  | 2004 | N England | M Atlantic | G Lakes | Central | Southeast | Southwest | West  | All Areas |
|--|------|-----------|------------|---------|---------|-----------|-----------|-------|-----------|
| <b>Corporate accounts (NAC)</b>              |      | 8,623     | 9,685      | 11,030  | 10,384  | 10,536    | 10,240    | 8,450 | 9,863     |
| <b>Individuals (COD)</b>                     |      | 6,147     | 6,792      | 6,915   | 7,656   | 7,506     | 7,573     | 6,814 | 7,121     |
| <b>Military</b>                              |      | 6,698     | 7,667      | 6,803   | 7,460   | 6,865     | 6,717     | 6,406 | 6,916     |
| <b>GSA (General Services Administration)</b> |      | 7,595     | 7,616      | 9,120   | 9,928   | 9,646     | 9,269     | 8,921 | 8,761     |
| <b>Interline (409)</b>                       |      | 6,347     | 7,133      | 6,637   | 7,108   | 6,566     | 6,272     | 6,123 | 6,561     |
| <b>Total First Proviso Traffic (above)</b>   |      | 7,074     | 7,998      | 8,798   | 8,737   | 8,225     | 8,272     | 7,283 | 8,004     |

Based on data provided by AMSA study carriers

# timing of moves

In 2008, July passed June as the most popular month to move, with 12.5% of moves picked up that month, up nearly three percentage points since 2006. June remained strong, just slightly behind July. November took over the spot as the slowest month from February and December, which suffer from one fewer day as well as winter doldrums. May continued to see an increase in percent of moves, possibly indicating a longer-term trend towards an earlier peak season.

## Shipments Picked Up by Month Comparison of Years 2002-2008



**KEY:**

- 2002
- 2003
- 2004
- 2005
- 2006
- 2007
- 2008

*Based on data provided by AMSA study carriers*

# timing of moves

Looking at pickup dates by week illustrates how much business is driven by the end of each month. On a calendar year basis, week 8 was the last full week in February and Week 9 (Feb 26–Mar 2) included the last few days of the month. Week 13 was the last week of March. National Account business peaked in Week 8 while COD shipments waited until the last three days of the month, which fell in Week 9. It was not until the last two weeks of May that the totals passed the last week of March. Those were the two busiest weeks of the year, driven primarily by National Account traffic. COD shipments peaked later in the summer, in Week 30. The last three weeks of peak season do not show any significant change in volume.

## Shipments Picked Up By Week - 2007

| Week      | NAC          | COD          | Combined     |
|-----------|--------------|--------------|--------------|
| 1         | 1.31%        | 1.26%        | 1.29%        |
| 2         | 1.45%        | 1.38%        | 1.42%        |
| 3         | 1.48%        | 1.34%        | 1.41%        |
| 4         | 1.78%        | 1.49%        | 1.63%        |
| 5         | 1.82%        | 1.57%        | 1.69%        |
| 6         | 1.38%        | 1.18%        | 1.28%        |
| 7         | 1.69%        | 1.35%        | 1.52%        |
| <b>8</b>  | <b>2.04%</b> | <b>1.60%</b> | <b>1.82%</b> |
| <b>9</b>  | <b>1.95%</b> | <b>1.97%</b> | <b>1.96%</b> |
| 10        | 1.66%        | 1.50%        | 1.58%        |
| 11        | 1.95%        | 1.77%        | 1.86%        |
| 12        | 2.63%        | 1.90%        | 2.26%        |
| <b>13</b> | <b>3.23%</b> | <b>2.71%</b> | <b>2.97%</b> |
| 14        | 2.14%        | 1.79%        | 1.97%        |
| 15        | 2.33%        | 1.93%        | 2.13%        |
| 16        | 2.59%        | 2.03%        | 2.31%        |
| 17        | 2.96%        | 2.91%        | 2.94%        |
| 18        | 2.49%        | 2.03%        | 2.26%        |
| 19        | 2.54%        | 2.08%        | 2.31%        |
| 20        | 2.93%        | 2.51%        | 2.72%        |
| 21        | 3.55%        | 2.74%        | 3.14%        |
| 22        | 3.56%        | 2.87%        | 3.22%        |
| 23        | 3.31%        | 2.71%        | 3.01%        |
| 24        | 3.38%        | 2.86%        | 3.12%        |
| 25        | 3.05%        | 2.73%        | 2.89%        |
| 26        | 3.10%        | 2.96%        | 3.03%        |

| Week      | NAC          | COD          | Combined     |
|-----------|--------------|--------------|--------------|
| 27        | 2.00%        | 1.82%        | 1.91%        |
| 28        | 2.46%        | 2.60%        | 2.53%        |
| 29        | 2.22%        | 2.50%        | 2.36%        |
| <b>30</b> | <b>2.93%</b> | <b>3.09%</b> | <b>3.01%</b> |
| 31        | 2.76%        | 2.60%        | 2.68%        |
| 32        | 2.51%        | 2.44%        | 2.47%        |
| 33        | 2.26%        | 2.34%        | 2.30%        |
| 34        | 2.17%        | 2.24%        | 2.20%        |
| 35        | 2.26%        | 2.31%        | 2.29%        |
| 36        | 1.37%        | 1.54%        | 1.45%        |
| 37        | 1.14%        | 1.59%        | 1.36%        |
| 38        | 0.89%        | 1.40%        | 1.15%        |
| 39        | 1.06%        | 1.92%        | 1.49%        |
| 40        | 0.67%        | 1.27%        | 0.97%        |
| 41        | 0.69%        | 1.28%        | 0.99%        |
| 42        | 0.65%        | 1.28%        | 0.97%        |
| 43        | 0.82%        | 1.58%        | 1.20%        |
| 44        | 0.82%        | 1.54%        | 1.19%        |
| 45        | 0.67%        | 1.24%        | 0.96%        |
| 46        | 0.71%        | 1.40%        | 1.06%        |
| 47        | 0.48%        | 0.81%        | 0.64%        |
| 48        | 1.08%        | 1.84%        | 1.46%        |
| 49        | 0.82%        | 1.38%        | 1.10%        |
| 50        | 1.37%        | 1.93%        | 1.66%        |
| 51        | 1.35%        | 1.45%        | 1.40%        |
| 52        | 1.53%        | 1.42%        | 1.47%        |

Based on data provided by AMSA study carriers

# inbound/outbound information

Of the 25 highest volume metropolitan areas by number of shipments, Charlotte, N.C. remained the most heavily weighted inbound destination for 2007, with more than twice as many inbound as outbound shipments. Detroit, Mich. passed the 2005 leader, New York City, as the most heavily outbound metropolitan area, with 63% of the shipments in Detroit headed outbound in 2007. Movers seeking a balanced city to maximize the efficient use of their equipment should head to Tampa, Fla. where 49.9% of the shipments were inbound and 50.1% outbound. Boston, Orlando, and San Francisco are other balanced markets for 2007.

## Large Metropolitan Areas

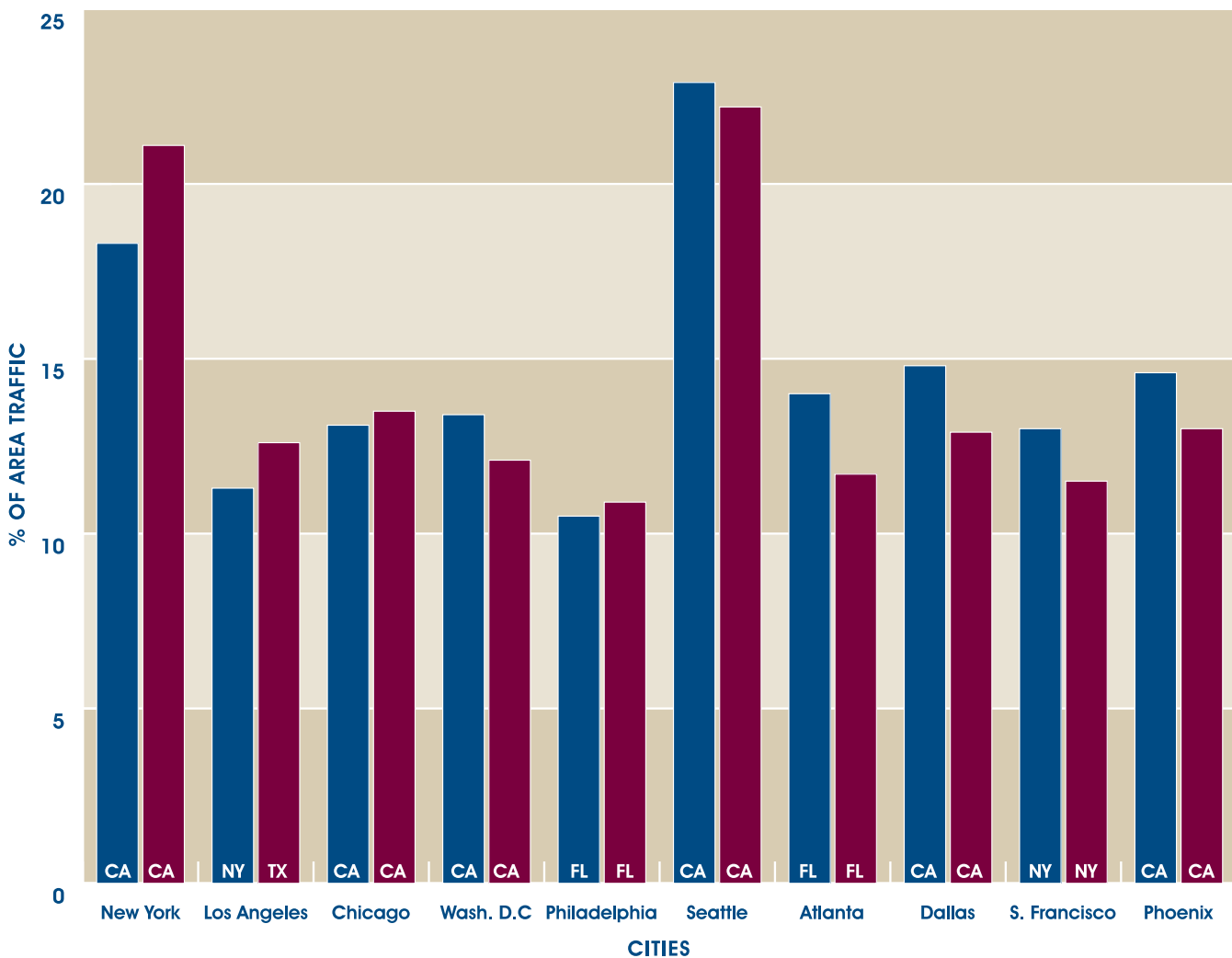
| Highest Volume Areas | 07 Shipments Inbound | Total 07 Shipments | 07 Shipments % Inbound | 07 Shipments % Outbound | Total 05 Shipments | 05 Shipments % Inbound |
|----------------------|----------------------|--------------------|------------------------|-------------------------|--------------------|------------------------|
| New York, NY         | 18733                | 45333              | 41.3                   | 58.7                    | 58364              | 36.3                   |
| Los Angeles, CA      | 15712                | 36366              | 43.2                   | 56.8                    | 49612              | 39.4                   |
| Chicago, IL          | 14296                | 32829              | 43.5                   | 56.5                    | 41051              | 43.6                   |
| Washington, DC       | 16568                | 31579              | 52.5                   | 47.5                    | 40475              | 50.2                   |
| Philadelphia, PA     | 10765                | 25170              | 42.8                   | 57.2                    | 29531              | 44.9                   |
| Seattle, WA          | 13527                | 24635              | 54.9                   | 45.1                    | 32395              | 59.0                   |
| Atlanta, GA          | 13497                | 24349              | 55.4                   | 44.6                    | 31655              | 58.6                   |
| Dallas, TX           | 13855                | 24023              | 57.7                   | 42.3                    | 30978              | 57.3                   |
| San Francisco, CA    | 12077                | 23393              | 51.6                   | 48.4                    | 32589              | 45.2                   |
| Phoenix, AZ          | 12066                | 21714              | 55.6                   | 44.4                    | 34373              | 59.7                   |
| Denver, CO           | 11778                | 20170              | 58.4                   | 41.6                    | 24771              | 55.9                   |
| Miami, FL            | 8722                 | 19991              | 43.6                   | 56.4                    | 28042              | 48.0                   |
| Houston, TX          | 11904                | 19734              | 49.3                   | 50.7                    | 22461              | 56.5                   |
| Boston, MA           | 9199                 | 18641              | 49.3                   | 50.7                    | 25560              | 43.6                   |
| <b>Detroit, MI</b>   | <b>6697</b>          | <b>18234</b>       | <b>36.7</b>            | <b>63.3</b>             | <b>21880</b>       | <b>38.0</b>            |
| <b>Tampa, FL</b>     | <b>8717</b>          | <b>17467</b>       | <b>49.9</b>            | <b>50.1</b>             | <b>27652</b>       | <b>53.8</b>            |
| Orlando, FL          | 7562                 | 15461              | 48.9                   | 51.1                    | 23228              | 51.6                   |
| San Diego, CA        | 7028                 | 15451              | 45.5                   | 54.4                    | 20814              | 40.1                   |
| Austin, TX           | 8535                 | 14684              | 58.1                   | 41.9                    | 16565              | 59.2                   |
| Minneapolis, MN      | 6247                 | 13355              | 46.8                   | 53.2                    | 16232              | 47.6                   |
| Baltimore, MD        | 5060                 | 11475              | 44.1                   | 55.9                    | 14518              | 44.2                   |
| <b>Charlotte, NC</b> | <b>7569</b>          | <b>11323</b>       | <b>66.8</b>            | <b>33.2</b>             | <b>14467</b>       | <b>67.7</b>            |
| Cleveland, OH        | 4704                 | 11244              | 41.8                   | 58.2                    | 13587              | 38.4                   |
| Las Vegas, NV        | 5795                 | 10952              | 52.9                   | 47.1                    | 15877              | 53.7                   |
| Portland, OR         | 6120                 | 10699              | 57.2                   | 42.8                    | 15330              | 61.0                   |

Based on data provided by AMSA study carriers

# inbound/outbound information

In 2007, the ten largest metropolitan areas saw shipments moving primarily from California, Florida, and New York, with outbound shipments to California and Florida. For example, 18.3% of the shipments inbound to the New York metropolitan area came from California. Shipments leaving New York went primarily (21.1%) to California. Other large metropolitan areas showed similar trends.

## Ten Largest Markets and Top Origination and Destination States in 2007



**KEY:** ■ Outbound From State ■ Inbound To State

*Based on data provided by AMSA study carriers*

# inbound/outbound information

**W**hen all metropolitan areas are considered, and not just the top 25 by shipment volume, Charlotte and Detroit remain the most unbalanced markets. Of the highest percentage inbound and outbound areas, Huntsville, Ala. has the heaviest shipments on average, with Winston-Salem, N.C. and Detroit also topping 10,000 pounds average weight, but only on inbound shipments. Fort Smith/Fayetteville, Ark. and Knoxville, Tenn. also had fairly heavy average shipment weights

While many markets had similar average weights for both inbound and outbound shipments, most of the North and South Carolina cities show a significant difference in the average weights. Surprisingly, this heart of furniture making is not seeing outbound families loaded down with lots of heavy new furniture, with average weights into the Carolinas running 500-1,300 pounds heavier than the outbound loads. Many large cities, by contrast, are showing outbound loads being much heavier, including Houston, Philadelphia, and Los Angeles.

## Inbound and Outbound for Select Areas in 2007

| Top Inbound Areas (by % inbound traffic) | Avg Weight Inbound | Avg Weight Outbound | Total Shipments |
|--|--------------------|---------------------|-----------------|
| Charlotte NC                             | 9,632              | 9,068               | 11,323          |
| Asheville NC                             | 8,886              | 7,617               | 2,519           |
| Jacksonville NC                          | 7,929              | 7,496               | 4,861           |
| Knoxville TN                             | 9,424              | 9,624               | 3,486           |
| Anderson SC                              | 9,749              | 8,879               | 4,352           |
| San Antonio TX                           | 8,978              | 8,742               | 8,691           |
| Houston TX                               | 8,855              | 9,684               | 19,734          |
| Huntsville AL                            | 10,006             | 10,046              | 3,755           |
| Ft. Smith/Fayetteville AR                | 9,941              | 9,869               | 2,706           |
| Raleigh-Durham NC                        | 9,248              | 7,804               | 10,463          |
| Columbia SC                              | 8,377              | 8,442               | 5,797           |
| Winston Salem NC                         | 10,066             | 8,791               | 4,527           |
| Denver CO                                | 8,887              | 8,547               | 20,170          |
| Austin TX                                | 8,259              | 7,605               | 14,684          |
| Dallas TX                                | 9,313              | 9,582               | 24,023          |

| Top Outbound Areas (by % outbound traffic) | Avg Weight Inbound | Avg Weight Outbound | Total Shipments |
|--|--------------------|---------------------|-----------------|
| Detroit MI                                 | 10,223             | 9,633               | 18,234          |
| Albany NY                                  | 7,277              | 6,630               | 2,520           |
| Buffalo NY                                 | 8,411              | 7,786               | 6,073           |
| San Bernardino CA                          | 7,604              | 8,491               | 9,024           |
| Fresno CA                                  | 7,476              | 8,064               | 2,086           |
| Bloomington IL                             | 9,873              | 8,077               | 2,251           |
| Toledo OH                                  | 9,653              | 9,317               | 2,340           |
| Milwaukee WI                               | 8,478              | 8,924               | 8,109           |
| New York NY                                | 6,969              | 7,614               | 45,333          |
| Dayton OH                                  | 8,695              | 8,629               | 3,381           |
| Cleveland OH                               | 9,379              | 9,130               | 11,244          |
| Monterey VA                                | 6,658              | 7,374               | 2,895           |
| Grand Rapids MI                            | 8,922              | 8,976               | 4,437           |
| Philadelphia PA                            | 8,391              | 9,353               | 25,170          |
| Los Angeles CA                             | 6,746              | 7,890               | 36,366          |

Based on data provided by AMSA study carriers

# breakdown of specific markets

In the ten largest metropolitan areas by shipment volume, New York and Chicago had mostly National Account shipments in their inbound mix, while Atlanta and Phoenix were the only two cities with mostly COD shipments inbound. Looking at outbound shipments, Atlanta switched completely to have the highest percentage of National Account shipments, followed closely by Dallas. Phoenix, New York, San Francisco, and Los Angeles had the highest percentage of outbound COD shipments. Seattle and Washington, DC are the largest military markets among the ten largest metropolitan areas.

The 15 most heavily inbound metropolitan areas contain several large military areas, including Jacksonville, N.C. and San Antonio, Texas. There are also quite a few heavily COD markets, such as Asheville, N.C. Houston is the only predominantly National Account market to make this list.

The largest COD markets are largely weighted to outbound shipments, led by the two largest markets, New York and Los Angeles. Atlanta, Denver, and Dallas are the most popular inbound markets, each over 60% inbound.

## Ten Largest Markets by Service Type in 2007

|               | Inbound Traffic |       |       |      |  | Outbound Traffic |       |       |      |
|---------------|-----------------|-------|-------|------|--|------------------|-------|-------|------|
|               | NAC             | COD   | MIL   | GSA  |  | NAC              | COD   | MIL   | GSA  |
| New York      | 53.0%           | 41.8% | 4.7%  | 0.5% |  | 40.7%            | 56.3% | 2.5%  | 0.5% |
| Los Angeles   | 48.3%           | 44.0% | 6.9%  | 0.8% |  | 37.3%            | 54.0% | 8.1%  | 0.6% |
| Chicago       | 53.0%           | 41.4% | 4.8%  | 0.8% |  | 50.5%            | 45.5% | 3.5%  | 0.5% |
| Washington DC | 36.5%           | 31.9% | 25.9% | 5.7% |  | 38.4%            | 42.1% | 15.7% | 3.8% |
| Philadelphia  | 51.0%           | 39.8% | 8.7%  | 0.5% |  | 51.4%            | 42.5% | 5.4%  | 0.7% |
| Seattle       | 37.3%           | 36.6% | 25.5% | 0.6% |  | 30.6%            | 42.4% | 26.1% | 0.9% |
| Atlanta       | 43.7%           | 49.0% | 6.3%  | 1.0% |  | 52.9%            | 39.1% | 6.2%  | 1.8% |
| Dallas        | 48.0%           | 45.9% | 5.3%  | 0.8% |  | 52.6%            | 41.9% | 4.6%  | 0.9% |
| San Francisco | 51.0%           | 45.3% | 2.8%  | 0.9% |  | 39.6%            | 56.1% | 3.4%  | 0.9% |
| Phoenix       | 35.1%           | 58.5% | 5.6%  | 0.8% |  | 33.4%            | 58.8% | 6.8%  | 1.0% |

Based on data provided by AMSA study carriers

# breakdown of specific markets

According to *Money Magazine*, the fastest growing real estate markets for 2009 will include areas in Texas, New York, Alabama, Louisiana, and Pennsylvania with the 12 month forecast for growth at a high of 4%. These areas are generally smaller cities that have a lower median home price than the larger metropolitan areas that are still suffering from the burst housing bubble. Opportunities for growth exist in pockets around the country, and are not concentrated in the Sun Belt states.

California, New York and Michigan are three states with large outbound population migration, which is expected to continue through year 2009. Economic outlooks and some reasons these states are reporting heavy outbound movement are as follows:

## California:

- Housing recovery could come as late as 2010 for some areas
- Price of diesel fuel and gas continue to be high
- Water supplies will impact agriculture, state officially in a drought
- \$17 billion state deficit will impact job growth
- Unemployment is projected at 6.5% for 2009
- Implementation of AB 32 (greenhouse gas legislation) and efforts to "green" state ports might bring higher costs of doing business to many industries.
- On the positive side, strong export markets, technology, and international tourism will provide support to the California economy.

## New York:

- Both employment and wages are expected to fall in 2009 (wages by 3.2%)
- State tax revenues are forecast to decline by 3.3% in 2009 – 2010 reflecting weakness in the financial industry.

- Slowdown in consumer spending is expected to limit 2009 – 2010 growth in sales tax revenue to 1.9%. Business taxes are expected to decrease by 1.1%.
- Variable wages are forecast to fall 41.3% in 2009, compared to a drop of 12.6% in 2008. As comparison, after the terrorist attacks of September 11, 2001, variable wages fell 24.1%

## Michigan:

- Wage and salary employment is forecast to fall by 1.2% in 2009 for the ninth straight year of state employment declines.
- Big concern is not the high rate of migration out of state, but the lack of newcomers; knowledge workers are leaving state and few are arriving
- Michigan has the fourth-highest unemployment rate in nation at 7.3%
- State is looking at a \$300 - \$600 million 2009 budget shortfall
- On positive side, a \$25 billion loan guarantee package for GM, Ford and Chrysler.

## Forecast for Fastest Growing Real Estate Markets in 2009

|                          | 12 month Forecast | Median Home Price |
|--------------------------|-------------------|-------------------|
| McAllen TX               | 4.0%              | \$109,000         |
| Rochester NY             | 2.7%              | \$121,000         |
| Birmingham AL            | 2.7%              | \$156,000         |
| Syracuse NY              | 2.6%              | \$126,000         |
| Buffalo/Niagara Falls NY | 2.4%              | \$105,000         |
| New Orleans LA           | 2.2%              | \$158,000         |
| Scranton PA              | 2.2%              | \$128,000         |
| Grand Rapids MI          | 1.9%              | \$124,000         |
| Baton Rouge LA           | 1.9%              | \$170,000         |
| El Paso TX               | 1.8%              | \$134,000         |

Source: *Money Magazine*

# specific market data

According to 2007 data provided by the AMSA study carriers, the metropolitan areas that are most heavily weighted to outbound shipments are generally in the Northeast and California. Albany, New York showed one of the largest changes since 2005, moving from only 55.7% outbound to 61.4% outbound in 2007, good enough for second place. Monterey, Calif. moved much more in balance, shifting from 64% outbound in 2005 (2nd place) to a more balanced 57.8% in 2007. New York City also moved much closer to balance in 2007. Oklahoma City joined the list in 2007, moving from almost balanced at 51.5% in 2005 to a 56.7% ratio in 2007.

## Largest Outbound Markets Based on Percentage Traffic Outbound

| Largest Outbound Areas  | 07 Outbound Shipments | Total 07 Shipments | 07 Shipments % Outbound | 05 Shipments % Outbound |
|-------------------------|-----------------------|--------------------|-------------------------|-------------------------|
| Detroit, MI             | 11537                 | 18234              | 63.3                    | 62.0                    |
| <b>Albany NY</b>        | <b>1548</b>           | <b>2520</b>        | <b>61.4</b>             | <b>55.7</b>             |
| Buffalo NY              | 3693                  | 6073               | 60.8                    | 64.7                    |
| San Bernardino CA       | 5421                  | 9024               | 60.1                    | 63.9                    |
| Fresno CA               | 1251                  | 2086               | 60.0                    | 63.3                    |
| Bloomington IL          | 1345                  | 2251               | 59.8                    | 60.7                    |
| Toledo OH               | 1395                  | 2340               | 59.6                    | 61.0                    |
| Milwaukee WI            | 4766                  | 8109               | 58.8                    | 54.1                    |
| <b>New York, NY</b>     | <b>26600</b>          | <b>45333</b>       | <b>58.7</b>             | <b>63.7</b>             |
| Dayton OH               | 1973                  | 3381               | 58.4                    | 53.0                    |
| Cleveland, OH           | 6540                  | 11244              | 58.2                    | 61.6                    |
| <b>Monterey CA</b>      | <b>1672</b>           | <b>2895</b>        | <b>57.8</b>             | <b>64.0</b>             |
| Grand Rapids MI         | 2540                  | 4437               | 57.2                    | 54.3                    |
| Philadelphia, PA        | 14405                 | 25170              | 57.2                    | 55.1                    |
| Los Angeles, CA         | 20654                 | 36366              | 56.8                    | 60.6                    |
| Hartford CT             | 5625                  | 9910               | 56.8                    | 58.8                    |
| <b>Oklahoma City OK</b> | <b>4164</b>           | <b>7347</b>        | <b>56.7</b>             | <b>51.5</b>             |

\*More than 2,500 shipments in the area and approximately 56% outbound ratio  
Based on data provided by AMSA study carriers

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