

MOVING TRENDS

Industry Survey Analysis

Conducted August 2025



OVERVIEW

Movers for America commissioned an independent survey of nearly 200 moving professionals in August 2025 to better understand how the termination of the Global Household Goods Contract (GHC) is shaping industry sentiment and expectations for the future of military moves. Respondents included independent van lines, agency owners, contractors, and independent owner-operators.

Overall, the results show that the industry views the termination of the GHC as a turning point. Optimism is high, but professionals also made clear what changes they believe are critical to building a stable, transparent, and sustainable program going forward.

Summary of Key Findings

Termination of the GHC sparked new optimism in military moving

- 71% of moving professionals say the end of the GHC makes them more likely to invest in military work. Enthusiasm is especially strong among contractors (84%).
- Fewer than 8% across all groups said they are less likely to participate in future military moves.
- This finding indicates that the GHC could have been a barrier to investment — and its cancellation has reignited industry confidence.

Strong preferences: an overwhelming desire for a tender-based environment where companies are free to choose with whom they partner to service DOD shipments

- 91% said any future program should be built on a tender-based system rather than a FAR-based structure.
- 97% of professionals stressed the importance of retaining the freedom to choose partners — whether move managers, other movers, or third-party providers.
- 91% said this professional freedom is “very important” to their business operations.
- Together, these responses highlight the industry’s strongest preference: a competitive environment that allows companies to build partnerships that work best for them and for service members.

Military revenues remain critical, but are shrinking as costs rise

- Around 60% of respondents say at least half of their company’s revenue comes from military moves.
- Nearly three-quarters of independent van lines (72%) and 80% of newer entrants (<10 years) rely on military business for the majority of revenue.
- Yet, two-thirds (66%) reported that revenues from military shipments have dropped at least 20% in the past five years, and one in six reported military shipment declines of over 50%.
- At the same time, nearly all respondents said costs have sharply risen over the past five years — with increases in labor (100%), insurance (99%), materials (98%), equipment (97%), and fuel (95%).

OVERVIEW

Quality of military moving oversight has deteriorated in the last 12-15 months, forcing companies to cut resources

- In the last 12–15 months, at least 90% of professionals said they've seen worsening conditions in **predictability, reliability, compensation, and fuel surcharge policies**.
- Problems were most acute among independent owners and those newer to the industry.
- Three-quarters of companies reported having **fewer drivers (75%)** and **fewer packing crews (71%)** available for the 2025 peak season, straining their ability to meet demand.

Concerns for the future: Trust, compensation, and Service Contract Act (SCA) compliance

- 93% of moving professionals cited compensation and lack of trust in TRANSCOM as their top concerns for a future program.
- More than eight in 10 also worry about bureaucratic complexity (88%) and increased liability exposure (86%).
- 91% expressed concern about complying with the SCA — with three-quarters saying they are extremely concerned.
- Independent owners and professionals with less than 20 years of experience reported the highest levels of concern, signaling that small and mid-sized businesses feel most at risk.

Industry priorities: Compensation, transparency, and operational fairness

- Four in five moving professionals support key enhancements to the DP3 program that would make military work more feasible, including:
 - **Fuel surcharges (85%)**
 - **More transparent communication with TRANSCOM (83%)**
 - **Additional compensation for accessing military bases (79%)**
- Independent owners and professionals with MORE than 10 years of experience voiced these priorities most strongly.
- Another three in five emphasized improvements such as streamlined weigh-in processes (63%) and faster approval of third-party charges (61%) — reforms especially important to those newer to the industry (<10 years).
- Eight in 10 independent owners and professionals (80%) with LESS than 10 years of experience voiced these priorities most strongly, significantly higher than the average 60% across all groups.

RAW FINDINGS

Q1

Nearly three-quarters (71%) of moving professionals say that the recent termination of the GHG contract makes them more likely to invest in military work, including:

- 76% of independent van lines / 67% of major van lines
- 84% of contractors compared to 66% of agency owners and 63% of independent owners

Less than 8% of moving professionals say that this contract termination will make them less likely to invest in military work, but an elevated 16% of independent owners said this.

Q2

Over 95% of moving professionals say it's either 'very important' (91%) or 'somewhat important' (6%) that any future DOD moving program be rooted in a tender-based environment versus a FAR-based structure.

Q3

At least nineteen out of twenty (97%) moving professionals say it's either 'very important' (91%) or 'somewhat important' (7%) that their businesses should be able to have the freedom to choose with whom your company partners (move managers, other movers, third party services, etc.) to service DOD shipments.

Q4

At least four out of five moving professionals agree that the following changes to the DP3 would make it more feasible to continue service domestic and international moves:

- Adding a fuel surcharge (85%), including
 - 95% of independent owners
 - 90% of those 10-20 year industry veterans
- More transparent communication between TRANSCOM and moving professionals (83%)
- Additional compensation for shipments that require going into a military installation (79%), including:
 - 82% of major van lines / 74% of independent van lines
 - 91% of independent owners / 78% of agency owners
 - 90% of those 10-20 year industry veterans

At least three out of five moving professionals agree that the following changes to the DP3 would make it more feasible to continue service domestic and international moves:

- A re-weigh process that is less frequent or more streamlined (63%), including:
 - 66% of major van lines / 57% of independent van lines
 - 67% of agency owners / 59% of contractors / 58% of independent owners
 - 80% of those in the industry less than 10 years
- Better approval of third-party changes (61%), including:
 - 68% of contractors
 - 80% of those in the industry less than 10 years

Only 36% of moving professionals said that fewer short-notice shipments would impact feasibility.

RAW FINDINGS

Q5

While only around one in six (15%) moving professionals say their military shipment revenues decreased by more than 50%, over half (51%) of moving professionals say that their military shipment revenues have decreased by 20-50% in the last year. Losses in the latter group were reported at elevated levels among:

- 54% of major van lines
- 56% of agency owners
- 52% of those >20 years in industry / 45% of those with 10-20 years in the industry

In the former group where revenues decreased by over 50%, some groups reported this loss at a higher rate, such as:

- 19% of independent van lines
- 23% of independent owners
- 20% of those with less than 10 years in the industry

Q6

About three in five (63%) moving professionals say that 50% or more of their revenue is related to military moves, including:

- 72% of independent van lines / 58% of major van lines
- 69% of agency owners / 66% of contractors
- 80% of those in the industry less than 10 years

Q7

Nearly all moving professionals reported that the following costs have increased in the last five years:

- Labor (100% of respondents said it increased)
- Insurance (99%)
- Material (98%)
- Equipment (97%)
- Fuel (95%)

Q8

One-quarter of moving professionals say that their materials costs have gone up by 50% in the last five years, including:

- 31% of independent van lines
- 32% of agency owners
- 39% of those with 10-20 years of experience in the industry

Q9

One-quarter of moving professionals say that their labor costs have gone up by at least 50% in the last five years, including:

- 38% of independent owners

RAW FINDINGS

Q10

Over one in five (22%) of moving professionals say that their insurance costs have gone up by at least 50% in the last five years, such as:

- 31% of independent van lines
- 27% of agency owners / 26% of contractors
- 24% of those with 10-20 years of experience in the industry

Q11

Around one in six (15%) of moving professionals say that their fuel costs have gone up by at least 50% in the last five years, such as:

- 20% of independent owners
- 33% of those in the industry less than 10 years / 22% for 10-20 years in industry

Q12

More than one in three moving professionals say that their equipment costs have gone up by at least 50% in the last five years, such as:

- 47% of independent van lines / 31% of major van lines
- 44% of those with 10-20 years of experience in the industry / 35% for more than 20 yrs

Q13

Over seven in ten (71%) moving companies have fewer packing crews reserved for this peak season, including:

- Three-quarters (74%) of independent van lines
- Three-quarters (74%) of agency owners

Q14

Three-quarters (75%) of moving companies have fewer drivers reserved for peak season, including:

- 78% of major van lines
- 78% of contractors
- 78% of those with more than 20 years in the industry

Q15

Nearly nine in ten (89%) of moving professionals think that it is 'very important' to have stability and predictability in program structure and shipment volumes from TRANSCOM so you can your ability to effectively serve DOD customers, such as:

- 100% of contractors
- 100% of those with less than 10 years of experience in the industry

Q16

Almost nine out of ten (89%) of moving professionals say that it is important to be able to file your own rates on a semi-regular basis for military business, especially:

- 87% of independent van lines
- 100% of those with less than 10 years of experience in the industry

RAW FINDINGS

Q17

Over seven in ten (71%) of moving professionals agree that it would be 'very difficult' to implement some requirements of the SCA, such as recordkeeping on the identities of labor, Social Security Numbers, elimination of day labor usage, conversion of independent drivers to company employees, and pay for each helper. This includes:

- 79% of independent owners
- 95% of those with 10-20 years of experience in the industry

Q18

Over the last 12-15 months, at least 50% of moving professionals say their experience with servicing military moves have gotten worse in the following respects:

- Fuel surcharge (94% say it has got worse), including:
 - 97% of independent owners
 - 100% of those with less than 10 years of experience in the industry
- Communications (71%), including:
 - 81% of independent owners
 - 79% of those with 10-20 years of experience in the industry
- Base access (79%), including:
 - 84% of independent van lines
 - 86% of independent owners
 - 94% of those with 10-20 years of experience in the industry
- Predictability and reliability (91%), including:
 - 100% of those with 10-20 years of experience in the industry
- Documentation and requirements (50%), including:
 - 69% of independent owners
 - 75% of those with less than 10 years of experience in the industry
- Compensation (91%), including:
 - 96% of major van lines
 - 97% of independent owners
 - 100% of those with less than 10 years of experience in the industry

RAW FINDINGS

Q19

Nearly all (99%) of moving professionals reported at least one of the following concerns about the following impacts of these changes on their business:

- Compensation (93%), including
 - 95% of major van lines
 - 100% of independent owners
 - 100% of contractors
- Lack of confidence in TRANSCOM / its contractors (93%), including:
 - 100% of those with 10-20 years of experience in the industry
- Complying with bureaucratic complexity (88%), including:
 - 92% of independent owners
 - 95% of those with 10-20 years of experience in the industry
- Increase of claims for liability and exposure (86%), including:
 - 95% of independent owners
 - 100% of those with less than 20 years of experience in the industry
- Administration of the SCA (85%), including
 - 92% of independent owners
 - 95% of those with 10-20 years of experience in the industry

Q20

Over nine in ten (91%) of moving professionals are either 'very concerned' (74%) or 'somewhat concerned' (17%) about complying with the complexity of the SCA. Greater levels of concern were expressed by:

- 93% of major van lines
- 93% of agency owners
- 95% of those with 10-20 years of experience in the industry