



**The Cumulative Impact of U.S. Import Compliance Programs at the
Canada/U.S. Land Border on the Canadian Trucking Industry**

QUESTIONNAIRES

Owner-Operator Questionnaire

Private Carrier Questionnaire

Shipper Questionnaire

TO ASSESS THE CUMULATIVE IMPACT OF U.S. IMPORT COMPLIANCE PROGRAMS AT THE CANADA/U.S. LAND BORDER ON THE CANADIAN TRUCKING INDUSTRY

OWNER-OPERATOR QUESTIONNAIRE

Name of Company: _____

Address: _____

Name of Respondent: _____

Title: _____

Phone Number: _____

Fax Number: _____

E-mail address: _____

Note:

If some parts of this questionnaire were not completed during the interview, the completed questionnaire can be sent back by either fax or by e-mail to the attention of:

**Don McKnight
DAMF Consultants Inc.**

Fax number: (514) 397-1887

E-mail address: danf2@qc.aibn.com

Thank you for participating in this survey. Your answers will be kept in the strictest confidence and will only used as part of the overall industry response. Your input will be invaluable to Transport Canada in assessing the impact of U.S. security measures on the Canadian trucking industry.

SECTION 1: CARRIER PROFILE

1.1 Are you an **independent owner-operator** picking up different loads from various shippers and/or carriers or do you **work under contract** with one particular carrier?

- independent under contract

1.2 If you are working under contract with a carrier, which best describes **your working relationship with the carrier?**

- Lease-operator- you work for a carrier using that carrier's insurance, licensing and usually the fuel programs
 Owner operator- you work for a carrier using your operating authority, license and insurance and you manage your own fuel and tax reporting.

1.3 How long have you been in your current position?

- Under 2 years Between 2 and 10 years Over 10 years

1.4 How many **power units (i.e., tractors)** do you currently lease or own?

of power units _____

1.5 Do you currently **employ drivers** and if so how many including yourself? _____

1.6 Where is your **operation based?** (**CHECK ALL THAT APPLY**)

- Newfoundland and Labrador Ontario
 Prince Edward Island Manitoba
 Nova Scotia Saskatchewan
 New Brunswick Alberta
 Québec British Columbia

1.7 What percentage of your revenues represents **transborder traffic** (i.e., between Canada and the United States)? _____%

1.8 For your transborder traffic, what **type of goods** do you haul and what percentage does it represent of your transborder revenues? (**CHECK ALL THAT APPLY**)

- Food products (dry van) _____% Petroleum Products _____%
 Food products (reefer) _____% Paper products _____%
 Dry van (all other) _____% Automotive products _____%
 Dry bulk _____% Lumber _____%
 Flat bed _____% Containers _____%
 Hazardous materials _____% Other (specify) _____/_____%
(Chemicals)

1.9 Approximately what percentage of your total transborder business is **truckload vs. less than truckload?**

Truckload = _____% of business
Less than Truckload = _____% of business

1.10 What was the approximate number of southbound **transborder trips** (one-way) that you made in the year 2004? _____ # of trips.

1.11 For your southbound transborder traffic, which gateways do you use and what percentage does each represent in terms of total truck trips made over the past year ? (**CHECK ALL THAT APPLY**)

- | | |
|---|---|
| 1 <input type="checkbox"/> Windsor/Detroit (Ambassador Bridge)____% | 11 <input type="checkbox"/> Rock Island/Derby Line____% |
| 2 <input type="checkbox"/> Sarnia/Port Huron (Blue Water Bridge)____% | 12 <input type="checkbox"/> Beauce/Jackman____% |
| 3 <input type="checkbox"/> Peace Bridge/Fort Erie____% | 13 <input type="checkbox"/> Huntingdon/Trout River____% |
| 4 <input type="checkbox"/> Queenston-Lewiston Bridge____% | 14 <input type="checkbox"/> Woodstock/Houlton____% |
| 5 <input type="checkbox"/> White Rock/Blaine____% | 15 <input type="checkbox"/> Aldergrove/Sumas____% |
| 6 <input type="checkbox"/> Lacolle/Champlain____% | 16 <input type="checkbox"/> Detroit/Windsor Tunnel____% |
| 7 <input type="checkbox"/> Lansdowne/Thousand Islands Bridge____% | 17 <input type="checkbox"/> Sault Ste.Marie Bridge____% |
| 8 <input type="checkbox"/> Emerson/Pembina____% | 18 <input type="checkbox"/> North Portal/Portal____% |
| 9 <input type="checkbox"/> Phillipsburg/Highgate Centre____% | 19 <input type="checkbox"/> St. Stephen/Calais____% |
| 10 <input type="checkbox"/> Coutts/Sweetgrass____% | 20 <input type="checkbox"/> Other (specify)_____/____% |

SECTION 2: U.S. BORDER CUSTOMS PROCEDURES

2.1 Since the terrorist attacks of Sept.11, 2001, **U.S. Customs and Border Protection (CBP)** has introduced a number of programs and regulations to secure the border against further attacks on U.S. soil. Do you now work for a **Customs-Trade Partnership Against Terrorism (C-TPAT)** certified carrier?

- 1 yes 2 no 3 carrier has conditional approval

2.2 Are you certified under the **Free and Secure Trade (FAST)** program?

- 1 yes 2 no

2.3 **If you answered no to the preceding question**, what is your certification status?

- 1 You have made an application but are awaiting approval. What is the status of your application in the approval process? _____
- 2 You have not yet made an application but intend to do so.
- 3 You do not intend to apply. Why not? _____

2.4 If you employ driver(s), is that driver FAST approved?

- 1 yes 2 no

2.5 If you answered **no to the preceding question**, what is the certification status of your driver(s)?

Please explain (e.g., status of approval process, not yet made an application, etc.) _____

2.6 What percentage of your transborder revenues involves dealing directly with the shipper versus dealing with third parties (e.g., load brokers, freight forwarders) to move the freight?

- 1 Shipper freight ____ % 2 Third Party freight ____%

2.7 When you deal directly with shippers or third parties, what percentage of each is FAST approved?

1 Shippers ____% 2 Third Parties ____%

2.8 Is your carrier partner FAST approved?

1 yes 2 no

2.9 Are you or any driver that you employ *landed immigrants* and not yet participants in the FAST program?

1 yes 2 no

2.10 ***If you answered yes to the preceding question***, have you had any problems or do you envision problems being subject to the *U.S. Visit program's biometric collection requirements*?

1 yes 2 no

If *yes*, please explain _____

2.11 What percentage of your U.S. shipments in 2004 have been using one or more of the following customs procedures prior to the requirement that all cargo manifests be submitted electronically to CBP at least one hour before trucks arrive at the U.S. border?

- 1 Regular inspection (no pre-approvals, pre-filing) ____%
- 2 Border Release Advanced Screening and Selectivity (BRASS) ____%
- 3 Selectivity Pre-Arrival Processing System (PAPS) ____%
- 4 QP/WP (customs broker applies bond to shipment) ____%
- 5 Customs Automated Forms Entry System or CAFES (carrier applies bond to shipment) ____%
- 6 PAPS using FAST Lane ____%
- 7 FAST National Customs Automation Program (NCAP) ____%

2.12 Now that all cargo manifests must now be submitted electronically to CBP as of late 2004 or early 2005 at least one hour before trucks arrive at the U.S. border under the *U.S. Trade Act 2002*, what customs procedures are you now using or your carrier or shippers planning to use in 2005?

- 1 Regular inspection (cargo value less than \$2,000) ____%
- 2 BRASS using FAST certified drivers ____%
- 3 Selectivity Pre-Arrival Processing System (PAPS) ____%
- 4 QP/WP (customs broker applies bond to shipment) ____%
- 5 Customs Automated Forms Entry System or CAFES (carrier applies bond to shipment) ____%
- 6 PAPS using FAST Lane ____%
- 7 FAST NCAP ____%

2.13 Do you transport food and food-related products covered by the *Food and Drug Administration (FDA) Public Health Security and Bio-Terrorism Preparedness and Response Act of 2002 (BTA)* that requires prior notice since Dec. 12, 2003?

1 yes 2 no

If *yes*, has the number of your in-transit shipments through the U.S. increased, decreased or stayed at the same level since the introduction of the new requirements?

1 increased 2 decreased 3 stayed the same

SECTION 3: DIRECT IMPACTS OF U.S. BORDER CUSTOMS PROCEDURES

3.1 Since the events of September 11, 2001 and the subsequent implementation of a number of programs and regulations by the U.S. CBP, have you experienced any *change in typical waiting time* to be processed at U.S. border crossings?

₁ yes ₂ no

(If no, proceed to question 3.7)

3.2 Has the change in waiting time increased or decreased?

₁ increased ₂ decreased

3.3 Do you believe that this change in waiting time is solely due to the new U.S. security measures or are other factors involved such as a change in vehicle traffic volumes, modifications to border facilities, infrastructure, etc.

₁ Due solely to U.S. security measures.

₂ Due to other factors. Describe _____

₃ Due to a combination of the U.S. security measures and other factors

3.4 If the waiting time has increased, could you provide an estimate of the average *increase* in waiting time¹ that you spend at U.S border crossings by providing your average wait times prior to 9/11 and post 9/11.

Avg. waiting time post 9/11 _____ (indicate hours or minutes per crossing)

Less: Avg. waiting time pre- 9/11 _____ (indicate hours or minutes per crossing)

Equals: Avg. increase in waiting time _____ (indicate hours or minutes per crossing)

3.5 *For the average waiting times indicated in the preceding question*, can you provide a breakdown between the time waiting in line to be processed and the actual processing time with the CBP experienced by you?

Post 9/11: ₁ Waiting time _____ (hours/min.) ₂ Processing time _____ (hours/min.)

Pre- 9/11: ₁ Waiting time _____ (hours/min.) ₂ Processing time _____ (hours/min.)

3.6 Have you noticed *any trend up or down in the average waiting time* since the events of 9/11 up until the present day?

₁ yes ₂ no

If *yes*, have average delay times been: ₁ increasing? or, ₂ decreasing?

¹ Waiting time is considered to start from the first queuing point before the border and end when the vehicle is released from inspection.

3.7 Have you found any difference in *the average waiting time between the various U.S. border crossings* that you use?

1 yes 2 no

If **yes**, could you provide more information (e.g., which border crossings, differences in average waiting time, etc.) _____

3.8 Have you changed or do you plan to change your method of operations in any way as a result of the U.S. security measures?

1 yes 2 no

If yes, please describe. _____

3.9 If you transport dangerous goods or hazardous materials across the U.S. border, are there any additional programs or procedures that you have carried out or plan to carry out as a result of the U.S. security measures?

1 yes 2 no 3 Does not apply

If **yes**, please describe (e.g., security plan, training program, etc.) _____

3.10 Could you please provide any details of the *cost impacts that the U.S. security measures* have had on your operation to-date. A preliminary list of possible cost factors is provided below. **Please check all that apply.** Any cost (\$) information would be appreciated.

1 Are you compensated for border crossing activities?

1 yes 2 no

2 **If yes to the preceding question**, does your carrier pay you a flat fee or an hourly rate for a border crossing?

1 Flat fee. Amount of fee(\$) _____

2 Hourly rate. Rate amount (\$) _____

3 Do you feel that you are fully compensated for the border crossing processing and waiting time?

1 yes 2 no

If **no**, to what % of your costs does the fee or rate cover? _____%

4 Have you incurred any additional costs related to border crossings (e.g., customs broker costs, faxing of manifests, follow-up calls, etc)? Describe and costs incurred (on a per trip basis) _____

5 Have border delays had an impact on your revenue earning capacity by decreasing your productivity or adding to the length of time that a trip would have taken prior to Sept. 11, 2001?

1 yes 2 no

If **yes**, describe and provide \$ impacts if possible _____

6 Have border delays caused operating difficulties with regard to respecting hours of service rules, delivery deadlines, etc.?

1 yes 2 no

If **yes**, describe and provide \$ impacts if possible _____

7 Other costs. Describe and costs incurred (\$) _____

3.11 Have there been any **cost savings** as a result of the U.S. security measures (e.g., insurance costs, etc.)?

1 yes 2 no

If **yes**, describe and savings incurred _____

3.12 Have you noticed a change in responsibilities or procedures between you and your carrier or shippers regarding the paperwork information flow to the customs broker (e.g., invoice, manifest)?

1 yes 2 no

If **yes**, describe _____

3.13 Since the implementation of the U.S. security measures, has there been any change in your contracts with carriers to accommodate border crossing delays or to respect the security measures?

1 yes 2 no

If **yes**, please explain. _____

3.14 Do you have a contingency plan in the event of a red alert at the U.S. border?

1 yes 2 no

3.15 Have the new U.S security measures had any impact on driver morale, your plans to remain in the industry, or your willingness to continue working in the cross-border environment?

1 yes 2 no

If yes, please provide details _____

3.16 If you have a FAST card, have you noticed any benefits to date (e.g., less waiting time, impacts on operations) and do you foresee any benefits in the future?

1 yes 2 no

If yes, please provide details _____

3.17 Does the fact that carriers and importers that are members of C-TPAT and using FAST certified drivers, can submit cargo information electronically only 30 minutes prior to the truck arrival at the U.S. Border have any positive impact on your operations?

1 yes 2 no

If yes, please provide details _____

3.18 Do you foresee any further impacts (either positive or negative) that the U.S. security measures would have on your operation in the future?

1 yes 2 no

If yes, please describe _____

SECTION 4: INDIRECT IMPACTS OF U.S. BORDER CUSTOMS PROCEDURES

4.1 Have there been changes in the *shipping methods and distribution patterns of Canadian shippers (importers), exporters or third parties* as a result of the U.S. security measures?

1 yes 2 no

If *yes*, please describe. _____

4.2 Have these changes had any direct impact on your operations or your bottom line?

1 yes 2 no

If *yes*, please describe. _____

4.3 From your point of view, are certain *segments of the Canadian trucking industry moving out of the transborder market* as a result of the U.S. security measures?

1 yes 2 no

If *yes*, who are they (e.g., owner-operators, smaller carriers, regional carriers)?

If *yes*, who is filling the void (e.g., larger Canadian carriers, U.S. carriers)?

4.4 Are Canadian carriers entering the U.S. being *treated any differently* than U.S. carriers that can then affect the competitiveness of Canadian carriers?

1 yes 2 no 3 do not know

If *yes*, explain. _____

4.5 Have the U.S security measures changed you *strategic planning or thinking* in terms of where or how you plan to operate/market and/or invest in the future?

1 yes 2 no

If *yes*, explain. _____

TO ASSESS THE CUMULATIVE IMPACT OF U.S. IMPORT COMPLIANCE PROGRAMS AT THE CANADA/U.S. LAND BORDER ON THE CANADIAN TRUCKING INDUSTRY

PRIVATE CARRIER QUESTIONNAIRE

Name of Company: _____

Address: _____

Name of Respondent: _____

Title: _____

Phone Number: _____

Fax Number: _____

E-mail address: _____

Note:

If some parts of this questionnaire were not completed during the interview, the completed questionnaire can be sent back by either fax or by e-mail to the attention of:

**Don McKnight
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Fax number: (514) 397-1887

E-mail address: danf2@qc.aibn.com

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SECTION 1: CARRIER PROFILE

1.1 What is your current *fleet size in terms of power units? (include owner-operator units)*

_____ POWER UNITS (TRACTORS AND STRAIGHT TRUCKS)

1.2 How many *drivers do you currently employ (including also owner-operators and contracted drivers)?* _____

1.3 What *percentage of your drivers* are:

- 1) Owner-operators? _____%
- 2) Contracted drivers (i.e., employed by an agency)? _____%
- 3) Company employees? _____%

1.4 Where is your *fleet based? (CHECK ALL THAT APPLY)*

- 1 Newfoundland and Labrador
- 2 Prince Edward Island
- 3 Nova Scotia
- 4 New Brunswick
- 5 Québec
- 6 Ontario
- 7 Manitoba
- 8 Saskatchewan
- 9 Alberta
- 10 British Columbia
- 11 Other (please specify) _____

1.5 What percentage of your company's shipments represents *transborder traffic* (i.e., between Canada and the United States)? _____%

1.6 Does your company also use for-hire carriers for transborder shipments?

- 1 yes
- 2 no

If *yes*, this represents what percentage of your companies transborder shipments? _____%

1.7 For your transborder traffic, what *type of goods* do you haul and what percentage does each represent of your company's transborder shipments? (**CHECK ALL THAT APPLY**)

- 1 Food products (dry van) _____%
- 2 Food products (reefer) _____%
- 3 Dry van (all other) _____%
- 4 Dry bulk _____%
- 5 Flat bed _____%
- 6 Hazardous materials _____%
(Chemicals)
- 7 Petroleum Products _____%
- 8 Paper products _____%
- 9 Automotive products _____%
- 10 Lumber _____%
- 11 Containers _____%
- 12 Other (specify) _____/_____%

1.8 What was the approximate number of southbound *transborder trips* that your trucking fleet made in the year 2004?

Number of transborder trips: _____

1.9 For your southbound transborder traffic, **which gateways** does your fleet use and what percentage does each represent in terms of total truck trips made over the past year ?

- | | |
|---|---|
| 1 <input type="checkbox"/> Windsor/Detroit (Ambassador Bridge)____% | 11 <input type="checkbox"/> Rock Island/Derby Line____% |
| 2 <input type="checkbox"/> Sarnia/Port Huron (Blue Water Bridge)____% | 12 <input type="checkbox"/> Beauce/Jackman____% |
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| 4 <input type="checkbox"/> Queenston-Lewiston Bridge____% | 14 <input type="checkbox"/> Woodstock/Houlton____% |
| 5 <input type="checkbox"/> White Rock/Blaine____% | 15 <input type="checkbox"/> Aldergrove/Sumas ____% |
| 6 <input type="checkbox"/> Lacolle/Champlain____% | 16 <input type="checkbox"/> Detroit/Windsor Tunnel____% |
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| 8 <input type="checkbox"/> Emerson/Pembina____% | 18 <input type="checkbox"/> North Portal/Portal____% |
| 9 <input type="checkbox"/> Phillipsburg/Highgate Centre____% | 19 <input type="checkbox"/> St. Stephen/Calais____% |
| 10 <input type="checkbox"/> Coutts/Sweetgrass____% | 20 <input type="checkbox"/> Other (specify)_____/____% |

SECTION 2: U.S. BORDER CUSTOMS PROCEDURES

2.1 Since the terrorist attacks of Sept.11, 2001, **U.S. Customs and Border Protection (CBP)** has introduced a number of programs and regulations to secure the border against further attacks on U.S. soil. Is your company now a member of the program called the **Customs-Trade Partnership Against Terrorism (C-TPAT)** established in 2002?

- 1 yes 2 no 3 conditional approval

2.2 Are you also certified under the **Free and Secure Trade (FAST)** program?

- 1 yes 2 no

2.3 What **percentage of your transborder drivers are FAST approved** (i.e., carrying a FAST Driver Card)? _____%

2.4 What percentage of your transborder drivers have applied to be FAST approved but have yet to be interviewed for final approval to obtain their FAST Driver Card? _____%

What are the reasons for this situation? _____

2.5 Do you have drivers who are **landed immigrants** and not yet participants in the FAST program?

- 1 yes 2 no
If **yes**, this represents what percentage of your transborder drivers? _____%

2.6 If you answered yes to the preceding question, have you had any problems or do you envision problems in these drivers being subject to the **U.S. Visit program's biometric collection requirements**?

- 1 yes 2 no
If **yes**, please explain _____

2.7 What percentage of your U.S. shipments in 2004 have been using one or more of the following customs procedures prior to the requirement that all cargo manifests be submitted electronically to the CBP at least one hour before trucks arrive at the U.S. border?

- 1 Regular inspection (no pre-approvals, pre-filing) ____%
- 2 Border Release Advanced Screening and Selectivity (BRASS) ____%
- 3 Selectivity Pre-Arrival Processing System (PAPS) ____%
- 4 QP/WP (customs broker applies bond to shipment) ____%
- 5 Customs Automated Forms Entry System or CAFES (carrier applies bond to shipment) ____%
- 6 PAPS using FAST Lane ____%
- 7 FAST National Customs Automation Program (NCAP) ____%

2.8 Now that all cargo manifests must be submitted electronically to the CBP as of late 2004 or early 2005, at least one hour before trucks arrive at the U.S. border under the *U.S. Trade Act 2002*, what customs procedures are you now using or shippers planning to use in 2005?

- 1 Regular inspection (cargo value less than \$2,000) ____%
- 2 BRASS using FAST certified drivers ____%
- 3 Selectivity Pre-Arrival Processing System (PAPS) ____%
- 4 QP/WP (customs broker applies bond to shipment) ____%
- 5 Customs Automated Forms Entry System or CAFES (carrier applies bond to shipment) ____%
- 6 PAPS using FAST Lane ____%
- 7 FAST NCAP ____%

2.9 Do you transport food and food-related products covered by the *Food and Drug Administration (FDA) Public Health Security and Bio-Terrorism Preparedness and Response Act of 2002 (BTA)* that requires prior notice since Dec. 12, 2003?

- 1 yes 2 no

If *yes*, has the number of your in-transit shipments through the U.S. increased, decreased or stayed at the same level since the introduction of the new requirements?

- 1 increased 2 decreased 3 stayed the same

If *yes*, has your company experienced any particular problems dealing with the *FDA BTA Act of 2002*?

Please elaborate. _____

SECTION 3: DIRECT IMPACTS OF U.S. BORDER CUSTOMS PROCEDURES

3.1 Since the events of September 11, 2001 and the subsequent implementation of a number of programs and regulations by the U.S. CBP, has your fleet experienced any *change in typical waiting time* to be processed at U.S. border crossings?

1 yes 2 no

(If no, proceed to question 3.7)

3.2 Has the change in waiting time increased or decreased?

1 increased 2 decreased

3.3 Do you believe that this change in waiting time is solely due to the new U.S. security measures or are other factors involved such as a change in vehicle traffic volumes, modifications to border facilities, infrastructure, etc.

1 Due solely to U.S. security measures.

2 Due to other factors. Describe _____

3 Due to a combination of the U.S. security measures and other factors

3.4 If the waiting time has increased, could you provide an estimate of the average *increase* in waiting time¹ that your fleet spends at U.S. border crossings by providing your average wait times prior to 9/11 and post 9/11.

Avg. waiting time post 9/11 _____ (indicate hours or minutes)

Less: Avg. waiting time pre- 9/11 _____ (indicate hours or minutes)

Equals: Avg. increase in waiting time _____ (indicate hours or minutes)

3.5 *For the average waiting times indicated in the preceding question*, can you provide a breakdown between the time waiting in line to be processed and the actual processing time with the CBP experienced by your fleet?

Post 9/11: 1 Waiting time _____ (hours/min.) 2 Processing time _____ (hours/min.)

Pre- 9/11: 1 Waiting time _____ (hours/min.) 2 Processing time _____ (hours/min.)

3.6 Have you noticed *any trend up or down in the average waiting time* since the events of 9/11 up until the present day?

1 yes 2 no

If *yes*, have average delay times been: 1 increasing? or, 2 decreasing?

3.7 Have you found any difference in *the average waiting time between the various U.S. border crossings* that you use?

1 yes 2 no

¹ Waiting time is considered to start from the first queuing point before the border and end when the vehicle is released from inspection.

If **yes**, could you provide more information (e.g., which border crossings, differences in average waiting time, etc.) _____

3.8 Have you changed or do you plan to change your method of operations in any way as a result of the U.S. security measures (e.g., dedicate a pool of drivers to transport transborder freight, modify use of team drivers, less/greater use of particular U.S. border crossings, etc.)?

1 yes 2 no

If yes, please describe. _____

3.9 If you transport dangerous goods or hazardous materials across the U.S. border, are there any additional programs or procedures that you have carried out or plan to carry out as a result of the U.S. security measures?

1 yes 2 no 3 Does not apply

If **yes**, please describe (e.g., security plan, training program, etc.) _____

3.10 Could you please provide any details of the **cost impacts that the U.S. security measures** have had on your company to-date. A preliminary list of possible cost factors is provided below. **Please check all that apply.** Any cost (\$) information would be appreciated.

1 Driver costs (e.g., bonuses to cross border, delays at border, training costs, FAST cards). Describe and total costs (\$) incurred per driver. _____

2 Security installations (e.g., to be C-TPAT compliant). Describe and costs incurred (\$) _____

3 Additional customs broker costs (e.g., filing of manifests) . Describe and costs incurred (on a per trip basis) _____

5 Decrease in asset utilization (i.e, need to purchase more equipment). Describe and costs incurred (\$). _____

6 Additional computer system costs (e.g., to transmit manifests electronically). Describe and total costs incurred (\$). _____

7 Administrative costs (e.g., creation of position to deal with U.S. security measures). Describe and costs incurred (\$) _____

8 Other costs. Describe and costs incurred (\$) _____

3.11 Have there been any *cost savings* as a result of the U.S. security measures (e.g., insurance costs, etc.)?

1 yes 2 no

If *yes*, describe and savings incurred _____

3.12 Does your company have a contingency plan in the event of a red alert at the U.S. border?

1 yes 2 no

3.13 Have the new U.S security measures had any impact on the supply or demand for truck drivers (e.g., overall driver requirements, ability to find qualified drivers for the transborder lanes, etc.) or driver morale?

1 yes 2 no

If *yes*, please provide details _____

3.14 For your trips involving FAST approved drivers, have you noticed any benefits to date (e.g., less waiting time, impacts on operations) and do you foresee any benefits in the future?

1 yes 2 no

If *yes*, please provide details _____

3.15 Does the fact that shippers as members of C-TPAT and FAST approved as well as using FAST certified drivers, can submit cargo information electronically and be approved by CBP only 30 minutes prior to the truck arrival at the U.S. Border have any positive impact on your operations?

1 yes 2 no

If *yes*, please provide details _____

3.16 Have the new U.S security measures had any impact on the use of for-hire carriers by your company for transborder shipments?

1 yes 2 no 3 Does not apply

If *yes*, please explain (e.g., increased/decreased use) _____

3.17 Do you foresee any further impacts (either positive or negative) that the U.S. security measures would have on your fleet operations in the future (e.g., implementation of the Automated Commercial Environment (ACE) program)?

1 yes 2 no

If *yes*, please describe _____

SECTION 4: INDIRECT IMPACTS OF U.S. BORDER CUSTOMS PROCEDURES

4.1 Have there been changes in the *shipping methods and distribution patterns of your company* as a result of the U.S. security measures?

1 yes 2 no

If *yes*, please describe. _____

4.2 *If yes to the preceding question*, have these changes had any direct impact on your fleet operations?

1 yes 2 no

If *yes*, please describe. _____

4.3 As a private carrier, do you also haul other companies' freight?

yes no

If *yes*, have the U.S. security measures had any impact on the amount of freight that you haul for other carriers? Please explain. _____

4.4 Have the U.S security measures changed you *strategic planning or thinking* in terms of how you plan to operate/invest in the private fleet in the future?

1 yes 2 no

If *yes*, explain. _____

TO ASSESS THE CUMULATIVE IMPACT OF U.S. IMPORT COMPLIANCE PROGRAMS AT THE CANADA/U.S. LAND BORDER ON THE CANADIAN TRUCKING INDUSTRY

SHIPPER QUESTIONNAIRE

Name of Company: _____

Address: _____

Name of Respondent: _____

Title: _____

Phone Number: _____

Fax Number: _____

E-mail address: _____

Note:

If some parts of this questionnaire were not completed during the interview, the completed questionnaire can be sent back by either fax or by e-mail to the attention of:

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SECTION 1: SHIPPER PROFILE

1.1 How would you categorize the commodities that your company produces?

- | | |
|--|--|
| <input type="checkbox"/> 1 Agriculture and food products ___% | <input type="checkbox"/> 7 Petroleum Products ___% |
| <input type="checkbox"/> 2 Plastic and chemical products ___% | <input type="checkbox"/> 8 Paper products ___% |
| <input type="checkbox"/> 3 Machinery and equipment ___% | <input type="checkbox"/> 9 Automotive products ___% |
| <input type="checkbox"/> 4 Base metal, steel and alloys ___% | <input type="checkbox"/> 10 Lumber ___% |
| <input type="checkbox"/> 5 Ores, minerals and concentrates ___% | <input type="checkbox"/> 11 Other manufactured products ___% |
| <input type="checkbox"/> 6 Cement and non-metallic products ___% | <input type="checkbox"/> 12 Other (specify) _____/ ___% |

1.2 Where are your *company's production facilities based*? (**CHECK ALL THAT APPLY**)

- | | |
|--|--|
| <input type="checkbox"/> 1 Newfoundland and Labrador | <input type="checkbox"/> 7 Manitoba |
| <input type="checkbox"/> 2 Prince Edward Island | <input type="checkbox"/> 8 Saskatchewan |
| <input type="checkbox"/> 3 Nova Scotia | <input type="checkbox"/> 9 Alberta |
| <input type="checkbox"/> 4 New Brunswick | <input type="checkbox"/> 10 British Columbia |
| <input type="checkbox"/> 5 Québec | <input type="checkbox"/> 11 Other (please specify) _____ |

1.3 What was the total dollar value (i.e., sales) of the products manufactured in Canada by your company in 2004? _____

1.4 What percentage of your company's products in terms of dollar value was shipped to the United States in 2004? _____%

1.5 For your shipments to the United States in 2004, what modes of transport did you use and what does each represent of the total dollar value?

- | | |
|---|---|
| <input type="checkbox"/> 1 For-hire truck ___% | <input type="checkbox"/> 5 Marine ___% |
| <input type="checkbox"/> 2 Own (private) truck ___% | <input type="checkbox"/> 6 Air freight ___% |
| <input type="checkbox"/> 3 Rail carload ___% | <input type="checkbox"/> 7 Courier ___% |
| <input type="checkbox"/> 4 Rail intermodal ___% | <input type="checkbox"/> 8 Other (please specify) _____/ ___% |

1.6 For your shipments moved by truck to the United States in 2004, how was the product moved in terms of type of equipment used and what does each represent of the total dollar value?

- | | |
|--|--|
| <input type="checkbox"/> 1 Dry van ___% | <input type="checkbox"/> 4 Tanker ___% |
| <input type="checkbox"/> 2 Refrigerated van ___% | <input type="checkbox"/> 5 Intermodal container ___% |
| <input type="checkbox"/> 3 Flat bed ___% | <input type="checkbox"/> 6 Other (specify) _____/ ___% |

1.7 What was the approximate number of southbound *transborder trips* made by trucks shipping your product to the United States in the year 2004?

Number of transborder trips: _____

1.8 Do you have any idea of **which gateways** were used by the for-hire carriers and your own private fleet (if applicable) for the transborder trips in 2004?

- 1 yes 2 no

If yes, which gateways did the trucks use and what percentage does each represent in terms of total truck trips made over the past year ?

- | | |
|---|---|
| 1 <input type="checkbox"/> Windsor/Detroit (Ambassador Bridge)____% | 11 <input type="checkbox"/> Rock Island/Derby Line____% |
| 2 <input type="checkbox"/> Sarnia/Port Huron (Blue Water Bridge)____% | 12 <input type="checkbox"/> Beauce/Jackman____% |
| 3 <input type="checkbox"/> Peace Bridge/Fort Erie____% | 13 <input type="checkbox"/> Huntingdon/Trout River____% |
| 4 <input type="checkbox"/> Queenston-Lewiston Bridge____% | 14 <input type="checkbox"/> Woodstock/Houlton____% |
| 5 <input type="checkbox"/> White Rock/Blaine____% | 15 <input type="checkbox"/> Aldergrove/Sumas____% |
| 6 <input type="checkbox"/> Lacolle/Champlain____% | 16 <input type="checkbox"/> Detroit/Windsor Tunnel____% |
| 7 <input type="checkbox"/> Lansdowne/Thousand Islands Bridge____% | 17 <input type="checkbox"/> Sault Ste.Marie Bridge____% |
| 8 <input type="checkbox"/> Emerson/Pembina____% | 18 <input type="checkbox"/> North Portal/Portal____% |
| 9 <input type="checkbox"/> Phillipsburg/Highgate Centre____% | 19 <input type="checkbox"/> St. Stephen/Calais____% |
| 10 <input type="checkbox"/> Coutts/Sweetgrass____% | 20 <input type="checkbox"/> Other (specify)_____/____% |

SECTION 2: U.S. BORDER CUSTOMS PROCEDURES

2.1 Since the terrorist attacks of Sept.11, 2001, **U.S. Customs and Border Protection (CBP)** has introduced a number of programs and regulations to secure the border against further attacks on U.S. soil. Is your company now a member of the program called the **Customs-Trade Partnership Against Terrorism (C-TPAT)** established in 2002?

- 1 yes 2 no 3 conditional approval

If no, could you provide the reasons why you are not a member of the C-TPAT program?

- 1 Not aware of the program
2 Aware but not interested (i.e., don't see the value)
3 Process takes too long
4 Other factors. Describe _____

2.2 Are you also certified under the **Free and Secure Trade (FAST)** program?

- 1 yes 2 no

If no, could you provide the reasons why you are not FAST approved?

- 1 Not aware of the program
2 Aware but not interested (i.e., don't see the value)
3 Process takes too long
4 Other factors. Describe _____

2.3 For your southbound transborder shipments by truck, are you aware of which customs procedures were used by the motor carriers to enter the United States in 2004?

1 yes 2 no

If yes, what percentage of your U.S. shipments were using one or more of the following customs procedures prior to the requirement that all cargo manifests be submitted electronically to the CBP at least one hour before trucks arrive at the U.S. border?

- 1 Regular inspection (no pre-approvals, pre-filing) _____%
- 2 Border Release Advanced Screening and Selectivity (BRASS) _____%
- 3 Selectivity Pre-Arrival Processing System (PAPS) _____%
- 4 QP/WP (customs broker applies bond to shipment) _____%
- 5 Customs Automated Forms Entry System or CAFES (carrier applies bond to shipment) _____%
- 6 PAPS using FAST Lane _____%
- 7 FAST National Customs Automation Program (NCAP) _____%

2.4 Now that all cargo manifests must be submitted electronically to the CBP as of late 2004 or early 2005, at least one hour before trucks arrive at the U.S. border under the ***U.S. Trade Act 2002***, are you aware of which customs procedures you or your motor carriers are planning to use in 2005?

1 yes 2 no

If yes, what percentage of your U.S. shipments will be using one or more of the following customs procedures?

- 1 Regular inspection (cargo value less than \$2,000) _____%
- 2 BRASS using FAST certified drivers _____%
- 3 Selectivity Pre-Arrival Processing System (PAPS) _____%
- 4 QP/WP (customs broker applies bond to shipment) _____%
- 5 Customs Automated Forms Entry System or CAFES (carrier applies bond to shipment) _____%
- 6 PAPS using FAST Lane _____%
- 7 FAST NCAP _____%

2.5 Do you transport food and food-related products covered by the ***Food and Drug Administration (FDA) Public Health Security and Bio-Terrorism Preparedness and Response Act of 2002 (BTA)*** that requires prior notice since Dec. 12, 2003?

1 yes 2 no

If yes, has your company experienced any particular problems dealing with the ***FDA BTA Act of 2002***?

Please elaborate. _____

SECTION 3: DIRECT IMPACTS OF U.S. BORDER CUSTOMS PROCEDURES

3.1 Since the events of September 11, 2001 and the subsequent implementation of a number of programs and regulations by the U.S. CBP, are you aware of any *change in typical waiting time for trucks* to be processed at U.S. border crossings?

yes no don't know

(If no or don't know, proceed to question 3.7)

3.2 Has the change in waiting time increased or decreased?

increased decreased

3.3 Do you believe that this change in waiting time is solely due to the new U.S. security measures or are other factors involved such as a change in vehicle traffic volumes, modifications to border facilities, infrastructure, etc.

Due solely to U.S. security measures.

Due to other factors. Describe _____

Due to a combination of the U.S. security measures and other factors

3.4 If the waiting time has increased, could you provide an estimate of the average *increase* in waiting time¹ that trucks spend at U.S border crossings by providing the wait times prior to 9/11 and post 9/11.

Avg. waiting time post 9/11 _____ (indicate hours or minutes)

Less: Avg. waiting time pre- 9/11 _____ (indicate hours or minutes)

Equals: Avg. increase in waiting time _____ (indicate hours or minutes)

3.5 Have you noticed *any trend up or down in the average waiting time* since the events of 9/11 up until the present day?

yes no

If *yes*, have average delay times been: increasing? or, decreasing?

3.6 Have you found any difference in *the average waiting time between the various U.S. border crossings* that you use?

yes no

If *yes*, could you provide more information (e.g., which border crossings, differences in average waiting time, etc.) _____

¹ Waiting time is considered to start from the first queuing point before the border and end when the vehicle is released from inspection.

3.7 Have you changed your method of operations in any way as a result of the U.S. security measures (e.g., just-in-time inventory management, more warehousing, change in the modes of transport that you use, less/more shipments to the United States, etc.)?

1 yes 2 no

If yes, please describe. _____

3.8 Have the new U.S security measures had any impact on the use of for-hire carriers versus the other transport modes (including the use of your private fleet if applicable) by your company for transborder shipments?

1 yes 2 no

If yes, please explain (e.g., increased/decreased use, reasons why) _____

3.9 Do your for-hire carriers charge a security surcharge for their costs incurred to comply with the U.S. security measures?

1 yes 2 no

If **yes**, what is the average surcharge applied? _____

3.10 Has your company incurred any other costs to-date in order to comply with the U.S. security measures?

1 yes 2 no

If **yes**, describe and costs incurred _____

3.11 If your company is C-TPAT and FAST approved, have you noticed any benefits to your operations?

1 yes 2 no

If **yes**, please describe details _____

3.12 Have you noticed a change in responsibilities or procedures between yourself and your for-hire carriers regarding the paperwork information flow to the customs broker (e.g., invoice, manifest) since the implementation of the U.S. security measures?

1 yes 2 no

If **yes**, describe _____

3.13 Have the new U.S security measures had any impact on your company's ability to compete in the United States?

1 yes 2 no

If **yes**, describe _____

3.14 Do you ship dangerous goods or hazardous materials across the U.S. border, are there any additional programs or procedures that you have carried out or plan to carry out with your carriers as a result of the U.S. security measures?

1 yes 2 no

If **yes**, have there been any impacts on your company since the implementation of the U.S. Security procedures? _____

3.15 Does your company have a contingency plan in the event of a red alert at the U.S. border?

1 yes 2

3.16 Do you foresee any further changes in operations or possible impacts (either positive or negative) that the U.S. security measures would have on your company in the future?

1 yes 2 no

If **yes**, please describe _____

SECTION 4: INDIRECT IMPACTS OF U.S. BORDER CUSTOMS PROCEDURES

4.1 Have you observed any changes in the *shipping methods and distribution patterns of other Canadian companies* as a result of the U.S. security measures?

1 yes 2 no

If **yes**, please describe. _____

4.2 Have the U.S security measures changed you *strategic planning or thinking* in terms of how you plan to market, operate or invest in the future, particularly in regard to serving the U.S. market?

1 yes 2 no

If *yes*, explain. _____

4.3 Do you have any recommendations/thoughts that would make the flow of good across the U.S. border more efficient under the U.S. security measures?

4.4 Do you have any other comments to make regarding the impacts of the U.S. security measures on your company?

END OF QUESTIONNAIRE