**OMB No. 2133-xxxx**

**Expiration Date: mm/dd/yy**

**Exhibit 3 –** **Transcript of On-Line Shippers Survey**

**A federal agency may not conduct or sponsor, and a person is not required to respond to, nor shall a person be subject to a penalty for failure to comply with a collection of information subject to the requirements of the Paperwork Reduction Act unless that collection of information displays a current valid OMB Control Number. The OMB Control Number for this information collection is 2133-xxxx. Public reporting for this collection of information is estimated to be approximately 20 minutes per response, including the time for reviewing instructions, completing and reviewing the collection of information. All responses to this collection of information are voluntary. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden to: Information Collection Clearance Officer, Maritime Administration, MAR-390, 1200 New Jersey Avenue, SE, Washington, DC 20590.**

**This is an online survey being done by Tompkins Associates on behalf of a client. The only personally identifiable information associated with each response is a code that is generated to indicate participation in the survey. (This code will be deleted when the online survey campaign is completed.) Participating in the survey will not jeopardize the competitive position of your organization. Further, the client will not have access to the names of respondents that participate in the survey, nor will the name of your organization appear in any publication. The administrators of this survey–Tompkins Associates–have a contractual agreement with the members of the Supply Chain Consortium, which prohibits revealing the identity of any survey respondents. At the end of this survey campaign, the data generated from the survey will be aggregated, the code will be deleted, and the results will then be reviewed by the client. The client’s input will have direct influence over key future decisions pertaining to the Panama Canal, so your input in this survey will be both influential and critical. In appreciation for your input, Tompkins will send each survey participant a summary of survey highlights.**

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| Panama Canal Expansion Study  |
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| **\* Required Information** |

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| **Thank you for your participation! The purpose of this survey is to assess international shippers' network and price sensitivity to the Panama Canal expansion opening in 2015. Information gathered in this survey will be used to help ensure smooth transition and anticipate the needs of shippers and the expected demand for services. The entire survey should take less than 20 minutes.** |

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| **Which of the following choices most closely describes your business?** (Select one option)  |
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|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | Retailer |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | Manufacturer |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | Wholesaler / Distributor |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | Logistics Service Provider / 3PL / 4PL |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | Other (please specify)  \_\_\_\_\_\_\_\_\_\_\_\_\_ |

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| **Segment** (Select one option)  |
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|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | Apparel, fabric, and accessories |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | Automotive and Truck Parts |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | Department Store and Discount |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | Electronics |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | Grocery, Food, and Beverage |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | Hardware and Home Improvement |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | Hobby, Toys, Arts & Crafts |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | Home Products, Furniture, Appliances |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | Personal Care and Drugs |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | Specialty |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | Logistics Service Provider |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | Other (please specify)  \_\_\_\_\_\_\_\_\_\_\_\_\_ |

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| **Which category best describes the size of your company?** (Select one option)  |
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|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | >$25 billion annual revenue |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | Between $10 billion and $25 billion annual revenue |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | Between $1 billion and $10 billion annual revenue |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | Between $250 million and $1 billion annual revenue |

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| **What is your approximate annual transportation spending for Fiscal Year 2011? ($US)** (Select one option)  |
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|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | < $2.5 Million |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | > $2.5 Million - $5 Million |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | > $5 Million - $7.5 Million |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | > $7.5 Million - $10 Million |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | > $10 Million - $15 Million |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | > $15 Million - $20 Million |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | > $20 Million - $30 Million |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | > $30 Million - $40 Million |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | > $40 Million - $50 Million |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | > $50 Million - $75 Million |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | > $75 Million - $100 Million |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | > $100 Million - $125 Million |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | > $125 Million - $150 Million |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | > $150 Million - $200 Million |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | > $200 Million - $250 Million |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | > $250 Million - $300 Million |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | > $300 Million - $400 Million |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | > $400 Million - $500 Million |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | > $500 Million - $750 Million |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | > $750 Million - $1.0 Billion |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | > $1.0 Billion - $1.5 Billion |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | > $1.5 Billion - $2.0 Billion |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | > $2.0 Billion |

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| **What is the current modal profile of your company as a percentage of total transportation spend (inbound and outbound, domestic and international)? Note: Total should equal 100%**  |
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| Air |

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| Rail (boxcar, tanker, etc...) |

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| Rail-intermodal |

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| Truckload |

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| **\* The primary focus of this survey pertains to overseas shipments to and from the United States. Does your company import product overseas into the United States? Does your company export goods overseas from the United States?** (Select one option)  |
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|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | Import goods from overseas only |  | Go to Page No. 3 |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | Export goods overseas from U.S only |  | Go to Page No. 6 |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | Both import and export overseas |  | Go to Page No. 3 |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | Neither import nor export overseas |  |  Stop, you have finished the survey |
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| If Did Not Answer Then Go to Page No. 9 |

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| **Imports** |

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| **Please indicate which entity has primary responsibility for the following order process control points for U.S.-bound imports from overseas. (Leave blank if a particular control point does not apply.)** |
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|  **Control Point** |

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|   | **North American & Overseas Staff** | **North American Staff only** | **Overseas Staff only** | **Supplier (inbound)** | **Logistics Service Provider (e.g. 3PL / Freight Forwarder)** | **Ocean / Air Carrier** |
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|  |   (a) | Routing (mode / service selection) (Select one option)  |

 | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif |
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|  |   (b) | Carrier / NVOCC selection (Select one option)  |

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|  |   (c) | Transfer of goods from Vendor/Supplier to Ocean/Air carrier (Select one option)  |

 | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif |
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|  |   (d) | Origin port selection (Select one option)  |

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|  |   (e) | Destination port selection (Select one option)  |

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|  |   (f) | Transfer of goods from Ocean/Air carrier to Domestic carrier (Select one option)  |

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| **Approximately what percentage of your company's U.S. imports from overseas are destined for each of the following regions. As a point of reference, the percentage of U.S. residents living in each region are:         Atlantic Coast:       35%         Inland East:           10%         Gulf:                       5%         West:                     50%**  |
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| http://research.zarca.com/clients/tompkins/qimg_5010412_1.jpg |
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| **For products and materials shipping into the United States from overseas, what percentage of loads utilize the following transportation modes? (NOTE: Total should equal 100%.)**  |
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| Ocean |

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| Air |

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| Total |   100   |

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| **Approximately what percentage of products and supplies sourced from overseas outside the United States originate from each of the following locations? (Note: Totals should equal 100%.)**  |
|

|  |  |  |
| --- | --- | --- |
|

|  |
| --- |
| China |

 |        |
|

|  |
| --- |
| Japan |

 |        |
|

|  |
| --- |
| Northeast Asia |

 |        |
|

|  |
| --- |
| Southern Asia |

 |        |
|

|  |
| --- |
| Pacific Rim |

 |        |
|

|  |
| --- |
| Central / South America - East Coast |

 |        |
|

|  |
| --- |
| Central / South America - West Coast |

 |        |
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| --- |
| Europe |

 |        |
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| --- |
| Africa / Middle East |

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| Total |   100   |

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| **What would be the most important factors to your company if it were considering a change in U.S. ports utilized for overseas imports? Please rank all choices. [Please rank all option(s) with 1 representing the most important choice and 6 representing the least important choice.]**  |
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|  | Inland transportation costs to Port   |

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 |   |
|  | Inland transportation speed to Port   |

|  |
| --- |
|    |

 |   |
|  | Inland transportation reliability to Port   |

|  |
| --- |
|    |

 |   |
|  | International shipping costs and port charges   |

|  |
| --- |
|    |

 |   |
|  | International shipping speed   |

|  |
| --- |
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 |   |
|  | International shipping reliability   |

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| **How are your company's imported goods shipped?** (Select one option)  |
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|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | Non-container |  | Go to Page No. 4 |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | Container |  | Go to Page No. 5 |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | Combination of container and non-container |  | Go to Page No. 4 |
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| If Did Not Answer Then Go to Page No. 6 |

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| page 4 |

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| **Imports: Non-container** |

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| **Approximately how many tons does your company import to North America from overseas on an annual basis?** (Select one option)  |
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| --- | --- | --- |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | > 2 million tons |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | >1 million - 2 million tons |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | >500k - 1 million tons |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | 100k - 500k |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | <100k |

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| **Considering the map below, approximately what percentage of your containers imported from overseas arrive at ports in each of the following regions? (Note: Total should equal 100%)**  |
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|

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| --- |
| East Coast |

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|

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| --- |
| Gulf Coast |

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|

|  |
| --- |
| West Coast |

 |        |
| Total |   100   |

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| **Branching Instructions** |
| Follow the branching rules in the sequence given below. Jump to the page as specified in the branching rule if all the conditions specified in the rule are satisfied. |
| Rule 1 |
| IF ANSWER TO (Q12 is (Non-container) AND Q6 is (Both import and export overseas) ) THEN GO TO Page6 |
| Rule 2 |
| IF ANSWER TO (Q12 is (Non-container) AND Q6 is (Import goods from overseas only) ) THEN GO TO Page9 |

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| page 5 |

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| **Imports – Container** |

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| **Approximately how many twenty foot equivalent units (TEUs) does your company import into the United States from overseas on an annual basis?** (Select one option)  |
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|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | >100,000 TEUs |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | 50,000 - 100,000 TEUs |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | 10,000 - 49,999 TEUs |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | 5,000 - 9,999 TEUs |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | 1,000 - 4,999 TEUs |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | 100 - 1,000 TEUs |

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| **Considering the map below, approximately what percentage of your non-containerized imports from overseas arrive at ports in each of the following regions? (Note: total should equal 100%)**  |
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|

|  |
| --- |
| East Coast |

 |        |
|

|  |
| --- |
| Gulf Coast |

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|

|  |
| --- |
| West Coast |

 |        |
| Total |   100   |

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| **Branching Instructions** |
| Follow the branching rules in the sequence given below. Jump to the page as specified in the branching rule if all the conditions specified in the rule are satisfied. |
| Rule 1 |
| IF ANSWER TO (Q6 is (Import goods from overseas only) ) THEN GO TO Page9 |

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| page 6 |

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| **Exports** |

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| **Please indicate which entity has primary responsibility for the following order process control points for U.S. exports bound for overseas.  (Leave blank if a particular control point does not apply.)** |
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| --- | --- |
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| --- |
|  **Control Point** |

 |
|   | **North American & Overseas Staff** | **North American Staff only** | **Overseas Staff only** | **Customer**  | **Logistics Service Provider (e.g. 3PL / Freight Forwarder)** | **Ocean / Air Carrier** |
|

|  |  |  |
| --- | --- | --- |
|  | (a) | Routing (mode / service selection) (Select one option)  |

 | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif |
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|  | (b) | Carrier / NVOCC selection (Select one option)  |

 | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif |
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|  | (c) | Transfer of goods from Vendor/Supplier to Ocean/Air carrier (Select one option)  |

 | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif |
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|  | (d) | Origin port selection (Select one option)  |

 | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif |
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|  | (e) | Destination port selection (Select one option)  |

 | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif |
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|  | (f) | Transfer of goods from Ocean/Air carrier to Domestic carrier (Select one option)  |

 | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif |

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| **Approximately what percentage of your company's U.S. overseas exports originate from each of the following regions. As a point of reference, the percentage of U.S. residents living in each region are:         Atlantic Coast:      35%         Inland East:           10%         Gulf:                       5%         West:                     50%**  |
|

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|  |
| --- |
| Atlantic Coast |

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|

|  |
| --- |
| Inland East |

 |        |
|

|  |
| --- |
| Gulf / Lower Mississippi Valley |

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|  |
| --- |
| West |

 |        |
| Total |   100   |

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| **For products and materials shipping overseas out of the United States what percentage of loads utilize the following transportation modes? (NOTE: Totals should equal 100%.)**  |
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|  |  |  |
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|

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| --- |
| Ocean |

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|

|  |
| --- |
| Air |

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| Total |   100   |

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|

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| --- |
| **Approximately what percentage of products and supplies exported overseas from the United States are destined to each of the following locations? (Note: Totals should equal 100%.)**  |
|

|  |  |  |
| --- | --- | --- |
|

|  |
| --- |
| China |

 |        |
|

|  |
| --- |
| Japan |

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|

|  |
| --- |
| Northeast Asia |

 |        |
|

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| --- |
| Southern Asia |

 |        |
|

|  |
| --- |
| Pacific Rim |

 |        |
|

|  |
| --- |
| Central / South America - East Coast |

 |        |
|

|  |
| --- |
| Central / South America - West Coast |

 |        |
|

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| --- |
| Europe |

 |        |
|

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| --- |
| Africa / Middle East |

 |        |
| Total |   100   |

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| **What would be the most important factors to your company if it were considering a change in U.S. ports utilized for exports overseas? Please rank all choices. [ Please rank all option(s). ]**  |
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| --- | --- | --- | --- | --- |
|  | Inland transportation costs to Port   |

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| --- |
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 |   |
|  | Inland transportation speed to Port   |

|  |
| --- |
|    |

 |   |
|  | Inland transportation reliability to Port   |

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| --- |
|    |

 |   |
|  | International shipping costs and port charges   |

|  |
| --- |
|    |

 |   |
|  | International shipping speed   |

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|    |

 |   |
|  | International shipping reliability   |

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| **How are your company's exported goods shipped?** (Select one option)  |
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| --- | --- | --- | --- | --- |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | Non-container |  | Go to Page No. 7 |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | Container |  | Go to Page No. 8 |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | Combination of container and non-container |  | Go to Page No. 7 |
|  |  |  |

|  |
| --- |
| If Did Not Answer Then Go to Page No. 9 |

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| page 7 |

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| **Exports: Non-container** |

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| **Which of the following best describes the types of goods your company exports?** (Select one option)  |
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|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | Grains and Agricultural Products |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | Refrigerated Agricultural Products and Meats |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | Wastepaper and scrap paper |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | Other scrap or recyclables |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | Mining and minerals |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | Chemicals and fertilizer (including salt) |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | Motor Vehicles |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | Motor Vehicle Parts |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | Other (please specify)  \_\_\_\_\_\_\_\_\_\_\_\_\_ |

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| **Considering the map below, approximately what percentage of your non-containerized exports destined for overseas ship out of ports in each of the following regions? (Note: total should equal 100%)**  |
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| East Coast |

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| Gulf Coast |

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| West Coast |

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| Total |   100   |

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| **Approximately what percentage of bulk loads originating in the United States and destined for export overseas are currently shipped via each of the following modes? (Note: total should equal 100%)**  |
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| Barge / Marine Highway |

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|

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| --- |
| Rail |

 |        |
|

|  |
| --- |
| Truck |

 |        |
| Total |   100   |

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| **Branching Instructions** |
| Follow the branching rules in the sequence given below. Jump to the page as specified in the branching rule if all the conditions specified in the rule are satisfied. |
| Rule 1 |
| IF ANSWER TO (Q22 is (Non-container) ) THEN GO TO Page9 |

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| page 8 |

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| **Exports – Container** |

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| **Approximately how many twenty foot equivalent units (TEUs) does your company export overseas from the United States on an annual basis?** (Select one option)  |
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|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | >100,000 TEUs |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | 50,000 - 100,000 TEUs |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | 10,000 – 49,999 TEUs |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | 5,000 – 9,999 TEUs |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | 1,000 – 4,999 TEUs |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | 100 – 1,000 TEUs |

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| **Considering the map below, approximately what percentage of your exported containers destined for overseas ship out of ports in each of the following regions? (Note: total should equal 100%)**  |
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| East Coast |

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| Gulf Coast |

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| West Coast |

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| Total |   100   |

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| **Approximately what percentage of container loads exported overseas from the United States are currently shipped via each of the following modes? (Note: total should equal 100%)**  |
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| Barge / Marine Highway |

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| --- |
| Rail / Intermodal |

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| --- |
| Truck |

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| Total |   100   |

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| page 9 |

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| **The remainder of this survey pertains to international overseas shipments between the United States and global regions that may be impacted by the Panama Canal expansion in 2015 (specifically Asia, the Pacific Rim, Central America, and South America).** |

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| **To many firms, the canal expansion is key to their business, to others it is a passing event. Which of the following statements most closely represents your company's planning for the opening of the Panama Canal expansion in 2015?** (Select one option)  |
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| --- | --- | --- |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | Expansion is extremely critical to our operations and formal network optimization scenarios and contingency planning have already begun. |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | We believe the canal expansion presents an opportunity but no analysis has been done to date on how to capture business from the opportunity. |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | We use the canal in our business model but don't believe there is any reason to look at changes to our international shipping patterns as we feel the canal expansion represents business as usual. |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | The Panama Canal expansion does not affect our business model and thus we have not planned any changes to our strategy. |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | We're aware of the expansion and its potential but don't have enough information at this time to assess and prepare for the opportunity. |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | This issue isn't currently under consideration and won't be until we are able to determine how it affects our operations once the Canal is opened. |

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| **\* Does your company import goods from one (or more) of the areas in question into the United States or does your company export goods from the United States to one (or more) of these regions?** (Select one option)  |
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| --- | --- | --- |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | Import overseas into U.S. only |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | Export overseas from U.S. only |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | Both import and export overseas |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | Neither import nor export overseas |

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| **Branching Instructions** |
| Follow the branching rules in the sequence given below. Jump to the page as specified in the branching rule if all the conditions specified in the rule are satisfied. |
| Rule 1 |
| IF ANSWER TO (Q31 is (Import overseas into U.S. only OR Both import and export overseas) AND Q12 is (Container OR Combination of container and non-container) ) THEN GO TO Page10 |
| Rule 2 |
| IF ANSWER TO (Q31 is (Export overseas from U.S. only) AND Q12 is (Container OR Combination of container and non-container) ) THEN GO TO Page11 |
| Rule 3 |
| IF ANSWER TO (Q31 is (Import overseas into U.S. only OR Both import and export overseas) AND Q12 is (Non-container) ) THEN GO TO Page12 |
| Rule 4 |
| IF ANSWER TO (Q31 is (Export overseas from U.S. only) AND Q12 is (Non-container) ) THEN GO TO Page13 |
| Rule 5 |
| IF ANSWER TO (Q31 is (Neither import nor export overseas) ) THEN STOP YOU HAVE FINISHED THIS SURVEY. |

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| page 10 |

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| **With the Panama Canal expansion set to open in 2015, we would like to understand how this opportunity may affect your company's future shipping patterns.** |

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| **U.S oversea imports (container) from Asia, the Pacific Rim, Central America, and South America** |

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| **While actual transit times will vary greatly based on inbound port and final destination, in general shipping containers to the Atlantic Coast Region via the Panama Canal will add approximately 5 days of transit relative to an overland intermodal solution. How much less expensive would total transportation costs need to be for you to switch from your current method to shipping to the Atlantic Coast via the Panama Canal?** (Select one option)  |
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| http://research.zarca.com/AllImages/images/blank.gif |

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| --- |
| http://research.zarca.com/clients/tompkins/qimg_5010439_1_small.jpg |
| Atlantic Coast Region |

 | http://research.zarca.com/AllImages/images/blank.gif |

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| --- | --- | --- |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | $50 - $149 / TEU |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | $150 - $249 / TEU |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | $250 - $349 / TEU |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | $350 - $449 / TEU |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | $450 or more / TEU |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | We would not consider a substantially longer transit time regardless of savings |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | We already ship to this region via the Panama Canal |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | We do not currently ship anything to this region |

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| **While actual transit times will vary greatly based on inbound port and final destination, on average shipping containers to the Inland East Coast via the Panama Canal will add approximately 6 days of transit relative to an overland intermodal solution. How much less expensive would total transportation costs need to be for you to switch from your current method to shipping to the Inland East Coast via the Panama Canal?** (Select one option)  |
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| http://research.zarca.com/clients/tompkins/qimg_5010440_1_small.jpg |
| Inland East Coast |

 | http://research.zarca.com/AllImages/images/blank.gif |

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| --- | --- | --- |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | $50 - $149 / TEU |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | $150 - $249 / TEU |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | $250 - $349 / TEU |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | $350 - $449 / TEU |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | $450 or more / TEU |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | We would not consider a substantially longer transit time regardless of savings |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | We already ship to this region via the Panama Canal |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | We do not currently ship anything to this region |

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| **While actual transit times will vary greatly based on inbound port and final destination, on average shipping containers to the Gulf / Lower Mississippi Valley via the Panama Canal will add approximately 4 days of transit relative to an overland intermodal solution. How much less expensive would total transportation costs need to be for you to switch from your current method to shipping to the Gulf / Lower Mississippi Valley via the Panama Canal?** (Select one option)  |
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| http://research.zarca.com/AllImages/images/blank.gif |

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| http://research.zarca.com/clients/tompkins/qimg_5010441_1_small.jpg |
| Gulf and Lower MS Valley |

 | http://research.zarca.com/AllImages/images/blank.gif |

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| --- | --- | --- |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | $50 - $149 / TEU |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | $150 - $249 / TEU |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | $250 - $349 / TEU |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | $350 - $449 / TEU |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | $450 or more / TEU |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | We would not consider a substantially longer transit time regardless of savings |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | We already ship to this region via the Panama Canal |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | We do not currently ship anything to this region |

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| **Branching Instructions** |
| Follow the branching rules in the sequence given below. Jump to the page as specified in the branching rule if all the conditions specified in the rule are satisfied. |
| Rule 1 |
| IF ANSWER TO (Q31 is (Import overseas into U.S. only) AND Q12 is (Container OR Combination of container and non-container) ) THEN GO TO Page14 |
| Rule 2 |
| IF ANSWER TO (Q31 is (Both import and export overseas) AND Q12 is (Container OR Combination of container and non-container) ) THEN GO TO Page11 |

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| page 11 |

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| **With the Panama Canal expansion set to open in 2015, we would like to understand how this opportunity may affect your company’s future shipping patterns.** |

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| **U.S exports (container) oversea to Asia, the Pacific Rim, Central America, and South America** |

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|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | $450 or more / TEU |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | We would not consider a substantially longer transit time regardless of savings |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | We already ship from this region via the Panama Canal |
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| **Branching Instructions** |
| Follow the branching rules in the sequence given below. Jump to the page as specified in the branching rule if all the conditions specified in the rule are satisfied. |
| Rule 1 |
| IF ANSWER TO (Q31 is (Import overseas into U.S. only) AND Q12 is (Non-container) ) THEN GO TO Page14 |
| Rule 2 |
| IF ANSWER TO (Q31 is (Import overseas into U.S. only OR Both import and export overseas) AND Q12 is (Non-container OR Combination of container and non-container) ) THEN GO TO Page12 |

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|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | $2 / Ton |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | $3 / Ton |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | $4 / Ton |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | $5 / Ton |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | We would not consider a substantially longer transit time regardless of savings |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | We already ship from this region via the Panama Canal |
|  | http://research.zarca.com/AllImages/images/icons/print_radiobut.gif | We do not currently ship anything from this region |

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| page 14 |

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| **Please be sure to hit "Submit" at the bottom of this page. Thank you so much for your valuable time and responses!** |

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| **How did you determine your answers to the previous questions about pricing and/or why do you feel this way?**  |
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| **What, if any, are your primary concerns or questions about shipping goods via the Panama Canal?**  |
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