

Canada – United States Border Survey

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Collected under authority of *Statistics
Act*, Revised Statutes of Canada

STC/SBS-723-75450

September, 2009

Introduction:

"Hello (contact name) this is (interviewer's name) from Statistics Canada. I am calling about the Canada - United States Border Survey. May I speak to your business's logistics administrator or with someone who can provide information on issues related to crossing the Canada - U.S. border to export or to import, please?"

"We're conducting the Canada - United States Border Survey in partnership with Industry Canada. The purpose of this survey is to learn about issues related to the border, about import and export trade practices and the impact border issues have on manufacturing businesses. This information is collected under the authority of *the Statistics Act*.

"Summary results from the Canada United - States Border Survey will be provided to respondents who are interested in receiving them. Would you like to receive a summary of the survey results?"

C8000 ○01 Yes ➔ **Go to C9000** ○03 No ➔ **Go to Confidentiality text**

C9000 How would you like to receive the results?

C9001

C9002

- 01 Email ➔ **Go to C9001**
- 02 Fax: ➔ **Go to C9002**
- 03 Mail : ➔ **Go to C9003, then C9004, then C9005, then C9006, then Confidentiality text.**

Address C9003

City C9004 Province/State C9005

Postal Code/ZIP Code C9006

Confidentiality Text:

This survey is being collected under the authority of the Statistics Act and your answers will be kept strictly confidential and used for statistical purposes only.

Statistics Canada may combine individual responses from this survey with information from other surveys.

While participation is voluntary, your assistance is essential if the results are to be accurate.

My supervisor may be listening for the purpose of quality control.

"I would like to review your business information."

Section 1: Exporting to the U.S.

1. Prior to 2008, did your business **export** any goods to the U.S.?

- o01 Yes
- o03 No

Any of the above → Go to Q2

2. In 2008, did your business **export** any goods to the U.S.?

- o01 Yes → **Go to Q3**
- o03 No

If Q1=Yes and Q2=No → Go to Q10
If Q1=No and Q2=No → Go to Q11

3. What was your main method of shipping to the U.S. in 2008?

(Choose one option)

- o01 Your own fleet (includes transport owned by parent company)
- o02 A trucking or rail company
- o03 A customs broker
- o04 A third party logistics provider
- o05 A wholesaler or distributor
- o06 A small package or courier service
- o07 Other please specify: _____

Any of the above → Go to Q4

4. In 2008, what percentage of your business's total sales were made to the U.S.?

C0400

_____ % If C0400>Empty → **Go to Q5;**
Else → **Go to C0401**

OR

C0401 (select only one)

- o01 0%
- o02 1% to 9%
- o03 10% to 39%
- o04 40% to 59%
- o05 60% to 89%
- o06 90% to 99%
- o07 100%

Any of the above → Go to Q5

5. In 2008, what percentage of your business' sales to the U.S. were used by customers as an input to their production process?

Inputs include all materials, equipment, and tools.

C0500

_____ % If C0500>Empty → **Go to Q6**
Else → **Go to C0501**

OR

C0501 (select only one)

- o01 0%
- o02 1% to 9%
- o03 10% to 39%
- o04 40% to 59%
- o05 60% to 89%
- o06 90% to 99%
- o07 100%

Any of the above → Go to Q6

6. In 2008, for your **exports** to the U.S., who was usually the **importer of record** ? Was it.... ..?

(Choose one option)

- o01 Your business
- o02 A customs broker
- o03 The customer
- o04 A trucking company
- o05 A freight forwarder
- o06 A logistics provider
- o07 Other, please specify _____

Any of the above → Go to Q7

7. In 2008, for your export that crossed the Canada-U.S. border the most frequently, how many days were required from the time an order was placed to when the exported goods arrived at your customer?

(Choose one option)

- o01 1-5 days
- o02 6 to 10 days
- o03 11 to 30 days
- o04 More than 30 days

Any of the above → Go to Q8

8. In 2008, what percentage of **exports** to the U.S. arrived on-time ?

(On-time shipments are all shipments that arrived close enough to the intended delivery time as to not adversely affect the customer's business or production.)

C0800

_____ % Less than 100% → Go to Q9; If 100% → Q13; If C0800=Empty

OR

(select only one)

- o01 0%
- o02 1% to 9%
- o03 10% to 39%
- o04 40% to 59%
- o05 60% to 89%
- o06 90% to 99%
- o07 100%

Less than 100% → Go to Q9; 100% → Q13

9. In 2008, were shipments late because of Canada - U.S. border issues or processes?

- o01 Yes
- o03 No

Any of the above → Go to Q13

10. Did your business stop **exporting** to the U.S. due to border issues?

- o01 Yes
- o03 No

Any of the above → Go to Q12

11. Did any border issues such as delays, complexity, changes in regulations or increased paperwork influence your decision not to **export** to the U.S.?

- o01 Yes
- o03 No

Any of the above → Go to Q12

12. Is **exporting** to the U.S. in the company's plans within the next three years?

- o01 Yes
- o03 No

Any of the above → Go to Q13

13. Which of the following would most likely cause your business to start or increase **exporting** across the Canada - U.S. border in the next three years

(Choose one option)

- o01 Improved border infrastructure and/or increased staff at border crossings
- o02 Improved certification programs and/or implementation of new certification programs
- o03 Reduced or simplified paperwork and/or increased use of information technology, for example, e-manifests (help definition) and/or ACI systems (help definition)
- o04 Reduced, simplified, or harmonized requirements for product standards, health and safety and border-related regulations.
- o05 Other: please specify _____

Any of the above → Go to Section 2, Question 14

Section 2: Exporting to Countries other than the U.S.

14. In 2008, could your business **export** and sell your products to countries, other than the U.S.? (Is there an international marketplace for the goods your business produced?)

- o1 Yes → **Go to Q15**
- o3 No → **Go to Section 3, Q16**

15. In 2008, did your business **export** to countries other than the U.S.?

- o01 Yes
- o03 No

Any of the above → Go to Section 3, Q16

Section 3: Importing from the U.S.

16. Prior to 2008, did your business **import any goods** from the U.S.?

- o01 Yes
- o03 No

Any of the above → Go to Q17

17. In 2008, did your business **import any goods** from the U.S. ?

- o01 Yes → **Go to Q18**
- o03 No

If Q16=Yes and Q17=No → Go to Q25

If Q16=No and Q17=No → Go to Q26

If Q2 AND Q17 are Empty → Go to End

18. In 2008, what was your main method of receiving goods from the U.S.?

(Choose one option)

- 01 Your own fleet (includes transport owned by parent company)
- 02 A trucking or rail company
- 03 A customs broker
- 04 A third party logistics provider
- 05 A wholesaler or distributor
- 06 A small package or courier service
- 07 Other please specify: _____

Any of the above → Go to Q19

19. Now thinking of all **imports** in 2008, what **percentage** of your business' **total imports** crossed the Canada - U.S. border?

C1900

OR

C1901 (select only one)

_____ % If C1900>Empty → Go to Q20:
Else → Go to C1901

- 01 0%
- 02 1% to 9%
- 03 10% to 39%
- 04 40% to 59%
- 05 60% to 89%
- 06 90% to 99%
- 07 100%

Any of the above → Go to Q20

20. In 2008, what percentage of your **imports from the U.S.** were used as an input into your business's production process?

Inputs include all materials, tools and equipment.

C2000

OR

C2001 (select one only)

_____ % If C2000>Empty → Go to Q21:
Else → Go to C2001

- 01 0%
- 02 1% to 9%
- 03 10% to 39%
- 04 40% to 59%
- 05 60% to 89%
- 06 90% to 99%
- 07 100%

Any of the above → Go to Q21

21. For your **imports** from the U.S. in 2008, who was usually the **importer of record**? (help definition) Was it....

(Choose one option)

- o01 Your business
- o02 A customs broker
- o03 The supplier
- o04 A trucking company,
- o05 A freight forwarder
- o06 A logistics provider
- o07 Other, please specify_____

Any of the above → Go to Q22

22. In 2008, for your input that crossed the Canada-U.S. border the most frequently, how many days were required from the time an order was placed to when the **imported** inputs arrived from the U.S.?

(Choose one option)

- o01 1 to 5 days
- o02 6 to 10 days
- o03 11 to 30 days
- o04 More than 30 days

Any of the above → Go to Q23

23. In 2008, what percentage of **imports** from the U.S. arrived on-time?

(On-time shipments are all shipments that arrived close enough to the intended time as to not adversely affect your business or production.)

C2300

_____ % Less than 100% → Go to Q24
100% → Go to Q28; If C2300=Empty → Go to C2301

OR

(select only one)

- o01 0%
- o02 1% to 9%
- o03 10% to 39%
- o04 40% to 59%
- o05 60% to 89%
- o06 90% to 99%
- o07 100%

Less than 100% → Go to Q24

100% → Go to Q28

24. In 2008, were shipments late because of Canada - U.S. border issues or processes?

- o01 Yes
- o03 No

Any of the above → Go to Q28

25. Did your business stop **importing** from the U.S. due to border issues?
- 01 Yes
 - 03 No

Any of the above → Go to Q27

26. Did any border issues such as delays, complexity, changes in regulations or increased paperwork influence your decision not to **import** from the U.S.?
- 01 Yes
 - 03 No

Any of the above → Go to Q27

27. Do you plan to import from the U.S. in the next three years?
- 01 Yes
 - 03 No

Any of the above → Go to Q28

28. Which of the following would most likely cause your business to start or increase **importing** across the Canada - U.S. border in the next three years?

(Choose one option)

- 01 Improved border infrastructure and/or increased staff at border crossings
- 02 Improved certification programs and/or implementation of new certification programs
- 03 Reduced or simplified paperwork and/or increased use of information technology, for example, e-manifests and ACI systems (help definition)
- 04 Reduced, simplified, or harmonized requirements for product standards, health and safety and border-related regulations .
- 05 Other: please specify _____

All of the above → Go to Section 4, Q29

Section 4: Imports from countries other than the U.S.

29. In 2008, could your business **import** inputs for your production processes from countries other than the U.S.? (Is there an international marketplace for your inputs?)
- 01 Yes → **Go to Q30**
 - 03 No → **If Q1=Yes AND Q2=Yes OR Q16=Yes AND Q17=Yes, go to Section 5 Intro; ELSE, go to Section 6 Intro**
30. In 2008, did your business **import** from countries other than the U.S.?
- 01 Yes
 - 03 No

If Q1=Yes AND Q2=Yes OR Q16=Yes AND Q17=Yes, go to Section 5 Intro; ELSE, go to Section 6 Intro.

Section 5: Border Thickness

Border thickness is a term used to measure perception of how difficult it is to **import** or **export**. Border thickness includes the following items that could affect the time and expense related to importing or exporting.

31. Over the last 3 years, have Canada – U.S. border delays...

- 01 Decreased
- 02 Stayed the same
- 03 Increased

Any of the above → Go to Q32

32. Over the last 3 years, has overall paperwork related to using the Canada - U.S. border.?

- 01 Decreased
- 02 Stayed the same
- 03 Increased

Any of the above → Go to Q33

33. Over the last 3 years, has the percentage of shipments that arrived late because of Canada - U.S. border issues...?

- 01 Decreased
- 02 Stayed the same
- 03 Increased

Any of the above → Go to Q34

34. Over the last 3 years, have costs including freight transport and insurance related to using the Canada - U.S. border...?

- 01 Decreased
- 02 Stayed the same
- 03 Increased

Any of the above → Go to Q35

35. Over the last three years, have tariffs and fees for the Canada - U.S. border?

- 01 Decreased
- 02 Stayed the same
- 03 Increased

Any of the above → Go to Q36

36. Over the last three years, have NAFTA rules of origin regulation ...?

- 01 Decreased
- 02 Stayed the same
- 03 Increased

Any of the above → Go to Q37

37. Over the last three years, have Canadian or U.S. requirements for product standards, health and safety and border-related regulations.

- 01 Decreased
- 02 Stayed the same
- 03 Increased

Any of the above → Go to Q38

38. In 2008, please indicate how Canada - U.S. border thickness in 2008 when importing, compared to border thickness, when exporting.

(Choose one option)

- o01 Border thickness was greater for importing.
- o02 Border thickness was greater for exporting.
- o03 Border thickness was the same for importing and exporting.

Any of the above → SECTION 6 INTRO

Section 6: Business Challenges

Of all the challenges your business could face, how would you evaluate the following potential challenges?

Please rate the following issues as not a challenge at all, a small challenge, somewhat of a challenge, a significant challenge, or an extreme challenge.

39. Competition from emerging economies, for example: Brazil, India, China, Russia, Mexico, etc.

- o01 Not a challenge at all
- o02 A small challenge
- o03 Somewhat of a challenge
- o04 A significant challenge
- o05 An extreme challenge

Any of the above → Go to Q40

40. Competition from developed economies, for example: Japan, Western Europe, the U.S. or from within Canada etc.

- o01 Not a challenge at all
- o02 A small challenge
- o03 Somewhat of a challenge
- o04 A significant challenge
- o05 An extreme challenge

Any of the above → Go to Q41

41. Current global economic conditions

- o01 Not a challenge at all
- o02 A small challenge
- o03 Somewhat of a challenge
- o04 A significant challenge
- o05 An extreme challenge

Any of the above → Go to Q42

42. Variability in the Canada - U.S. exchange rate

- o01 Not a challenge at all
- o02 A small challenge
- o03 Somewhat of a challenge
- o04 A significant challenge
- o05 An extreme challenge

Any of the above → Go to Q43

43. Energy and commodity prices

- o01 Not a challenge at all
- o02 A small challenge
- o03 Somewhat of a challenge
- o04 A significant challenge
- o05 An extreme challenge

Any of the above → Go to Q44

44. Canada - U.S. border thickness

- o01 Not a challenge at all
- o02 A small challenge
- o03 Somewhat of a challenge
- o04 A significant challenge
- o05 An extreme challenge

Any of the above → Go to Q45

45. Attracting and retaining skilled employees in Canada

- o01 Not a challenge at all
- o02 A small challenge
- o03 Somewhat of a challenge
- o04 A significant challenge
- o05 An extreme challenge

Any of the above → Go to Q46

46. Does your business have other challenges that have not been mentioned?

o01 Yes Please list these challenges:

1st other challenge: _____

2nd other challenge: _____

3rd other challenge: _____

If C4615 > Empty → Go to C4616; then If C4625 > Empty → Go to C4626; then If C4635 > Empty → Go to C4636; then If Q2=No and Q17=No → Go to End; Else → Go to SECTION 7 INTRO

o03 No If Q2=No and Q17=No → Go to End; Else → Go to SECTION 7 INTRO

For (fill in C4615), how would you rate this issue?

- o02 A small challenge
- o03 Somewhat of a challenge
- o04 A significant challenge
- o05 An extreme challenge

For (fill in C4625), how would you rate this issue?

- o02 A small challenge
- o03 Somewhat of a challenge
- o04 A significant challenge
- o05 An extreme challenge

For (fill in C4635), how would you rate this issue?

- o02 A small challenge

- o03 Somewhat of a challenge
- o04 A significant challenge
- o05 An extreme challenge

If Q2=No and Q17=No then → Go to End Else → Go to SECTION 7 INTRO

Section 7: Border Challenges

Now I am going to ask questions specifically related to challenges your business may have faced in 2008 due to the Canada - U.S. border. Please rate the following factors as not a challenge at all, a small challenge, somewhat of a challenge, a significant challenge, or an extreme challenge.

→ Go to Q47

47. Border delays?

- o01 Not a challenge at all
- o02 A small challenge
- o03 Somewhat of a challenge
- o04 A significant challenge
- o05 An extreme challenge

Any of the above → Go to Q48

48. Overall paperwork related to using the Canada - U.S. border?

C4800

- o01 Not a challenge at all
- o02 A small challenge
- o03 Somewhat of a challenge
- o04 A significant challenge
- o05 An extreme challenge

Any of the above → Go to Q49

49. Uncertainty related to the extent of border delays?

C4900

- o01 Not a challenge at all
- o02 A small challenge
- o03 Somewhat of a challenge
- o04 A significant challenge
- o05 An extreme challenge

Any of the above → Go to Q50

50. Costs including freight transport and insurance related to using the Canada - U.S. border?

C5000

- o01 Not a challenge at all
- o02 A small challenge
- o03 Somewhat of a challenge
- o04 A significant challenge
- o05 An extreme challenge

Any of the above → Go to Q51

51. NAFTA rules of origin regulation

- 01 Not a challenge at all
- 02 A small challenge
- 03 Somewhat of a challenge
- 04 A significant challenge
- 05 An extreme challenge

Any of the above → Go to Q52

52. Tariffs or fees payable at the border

- 01 Not a challenge at all
- 02 A small challenge
- 03 Somewhat of a challenge
- 04 A significant challenge
- 05 An extreme challenge

Any of the above → Go to Q53

53. The number of hours and timing of when inspectors are on duty at the border?

- 01 Not a challenge at all
- 02 A small challenge
- 03 Somewhat of a challenge
- 04 A significant challenge
- 05 An extreme challenge

Any of the above → Go to Q54

54. Canadian requirements including product standards, health and safety and border-related regulations?

- 01 Not a challenge at all
- 02 A small challenge
- 03 Somewhat of a challenge
- 04 A significant challenge
- 05 An extreme challenge

Any of the above → Go to Q55

55. U.S. requirements including product standards, health and safety and border-related regulations?

- 01 Not a challenge at all
- 02 A small challenge
- 03 Somewhat of a challenge
- 04 A significant challenge
- 05 An extreme challenge

Any of the above → Go to Q56

56. The differences between Canadian and U.S. requirements including product standards, health and safety and border-related regulations?

- 01 Not a challenge at all
- 02 A small challenge
- 03 Somewhat of a challenge
- 04 A significant challenge
- 05 An extreme challenge

If Q2=No → Go to Q58; Else → Go to Q57

57. In 2008, which of the following was the most important border issue when **exporting** to the U.S.?

(Choose one option)

- 01 Border delays
- 02 Overall paperwork
- 03 Uncertainty related to the extent of border delays
- 04 Costs including freight transport and insurance related to using the Canada - U.S. border
- 05 NAFTA rules of origin regulation
- 06 Tariffs or fees payable at the border
- 07 The number of hours and timing of when inspectors are on duty at the border
- 08 Canadian requirements including product standards, health and safety and border-related regulations
- 09 U.S. requirements including product standards, health and safety and border-related regulations
- 10 The differences between Canadian and U.S. requirements including product standards, health and safety and border-related regulations

If Q17=No → Go to Q59; Else → Go to Q58

58. In 2008, which of the following was the most important border issue when **importing** from the U.S. ?

(Choose one option)

- 01 Border delays
- 02 Overall paperwork
- 03 Uncertainty related to the extent of border delays
- 04 Costs including freight transport and insurance related to using the Canada - U.S. border
- 05 NAFTA rules of origin regulation
- 06 Tariffs or fees payable at the border
- 07 The number of hours and timing of when inspectors are on duty at the border
- 08 All Canadian requirements including product standards, health and safety and border-related regulations
- 09 All U.S. requirements including product standards, health and safety and border-related regulations
- 10 The differences between all Canadian and U.S. regulatory requirements including product standards, health and safety and border-related regulations

Any of the above → Go to Q59

59. How much do you think **border thickness** costs represented as a percentage of your **total operating costs** in 2008?

Do not include transportation costs such as fuel costs and freight charges but do include tariffs and fees, logistics, paperwork, regulatory procedures, staff that manage cross-border logistics, etc.

C5900

_____ %

Any of the above → Go to Q60

60. If your **total border thickness costs** (If Q59>0 fill with “of ___%”, else blank) were to suddenly **increase** by 50% (if Q59>0 fill with “to ___%*1.5”, else blank), would there be any **significant impact** to your business?

Significant in that your business would have to change its practices.

- o01 Yes → **Go to Q61**
- o03 No → **Go to section 8 intro**

61. Would your business be able to pass some or all of the cost increase on to customers?

- o01 Yes
- o03 No

Any of the above → Go to Q62

62. Would there be a temporary or ongoing loss in profitability?

- o01 Yes
- o03 No

If Q17=No → Go to Q64; Else → Go to Q63

63. Would your business be forced to **source** (import inputs) from countries other than the U.S.?

- o01 Yes
- o03 No

If Q2=No → Go to Q65; Else → Go to Q64

64. Would your business **export** significantly less to the U.S.?

- o01 Yes
- o03 No

If Q17=No → Go to section 8 intro; Else → Go to Q65

65. Would your business **import** significantly less from the U.S.?

- o01 Yes
- o03 No

If Q1=Yes AND Q2=Yes OR Q16=Yes AND Q17=Yes, go to Section 8 Intro; ELSE, go to Section 9 Intro.

Section 8: Past Strategic Decisions

The next questions ask about strategic decisions your business may have taken in the last three years due to border thickness (help definition).

If Q1=No and Q2=No → Go to Q67; Else → Go to Q66

66. In the last three years, did your business decrease reliance on the U.S. for **exports** due to border thickness?

- o01 Yes
- o03 No

IF Q16=No and Q17=No → Go to Q68; Else → Go to Q67

67. In the last three years, did your business decrease reliance on the U.S. for **imports** due to border thickness?

- o01 Yes
- o03 No

Any of the above → Go to Q68

68. In the last three years, did your business invest in new or existing facilities in Canada due to border thickness?

- o01 Yes
- o03 No

Any of the above → Go to Q69

69. In the last three years, did your business invest in new or existing facilities in the U.S. due to border thickness?

- o01 Yes
- o03 No

Any of the above → Go to Q70

70. In the last three years, did your business change which border crossing to use or change the mode of transportation due to border thickness?

- o01 Yes
- o03 No

Any of the above → Go to Q71

71. In the last three years, did your business allow more time for shipments to reach their destination or change the time of day or week when shipments are made due to border thickness?

- o01 Yes
- o03 No

Any of the above → Go to Q72

72. In the last three years, did your business increase inventory levels due to border thickness?

- o01 Yes
- o03 No

Any of the above → Go to Q73

73. In the last three years, did your business outsource cross-border logistics to a third-party provider due to border thickness?

- o01 Yes
- o03 No

Any of the above → Go to Q74

74. In the last three years, did your business switch from smaller, more frequent shipments to larger, less frequent shipments due to border issues?
- o01 Yes
 - o03 No

Any of the above → Go to Q75

75. In the last three years, did your business hire additional workers to manage trade or provide training related to border issues to staff due to border thickness?
- o01 Yes
 - o03 No

Any of the above → Go to Section 9 Intro

Section 9 Certification and Borders Used

These last four questions ask about your company's certification and the regions where your shipments cross the border.

76. In 2008, was your business c-TPAT/PIP certified?
- o01 Yes
 - o03 No

Any of the above → Go to Q77

77. In 2008, did your business **import or export** across the Canada - U.S. border in your own province or territory?
- o01 Yes
 - o03 No

Any of the above → Go to Q78

78. In 2008, did your business **import or export** across the Canada - U.S. border in any other provinces or territories?
- o01 Yes → **Go to Q79**
 - o03 No → **Go to END**

79. In which other provinces or territories did your business import or export across the Canada - U.S. border in 2008?

(Note all that apply)

Newfoundland and Labrador	o01	Yes
Prince Edward Island	o01	Yes
Nova Scotia	o01	Yes
New Brunswick	o01	Yes
Quebec	o01	Yes
Ontario	o01	Yes
Manitoba	o01	Yes
Saskatchewan	o01	Yes
Alberta	o01	Yes
British Columbia	o01	Yes
Yukon	o01	Yes
Northwest Territories	o01	Yes
Nunavut	o01	Yes

'END'

The interview is now finished.

Do you have any comments about this survey?

On behalf of Statistics Canada, thank you for taking part in this survey.

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