

APPENDIX B

FREIGHT INDUSTRY SURVEY RESULTS

A survey was developed to assess the freight patterns of industries in the Southeast Michigan EER (Appendix B-1). More than 300 businesses were contacted in person, by mail, phone, and e-mail several times between June and October 2011. Forty-seven responses were received (lower than the original expectation of 100 responses). Nonetheless, the returns represent a substantial expansion in number and variety of users with a unique perspective of the regional freight system. All responses are held confidential.

The respondents by industry type are:

- Manufacturing – 12 responses
- Logistics – 18 responses
- Railroads – 3 responses
- Warehousing – 4 responses
- Retailing – 3 responses
- Other – 7 responses

The “other” category includes businesses such as a port operator, a power generator, a health care provider, and a materials company. The geographic distribution of all 47 companies is shown on Figure B-1. Forty of the 47 respondents have their primary location in the region; all have an operation in Michigan.



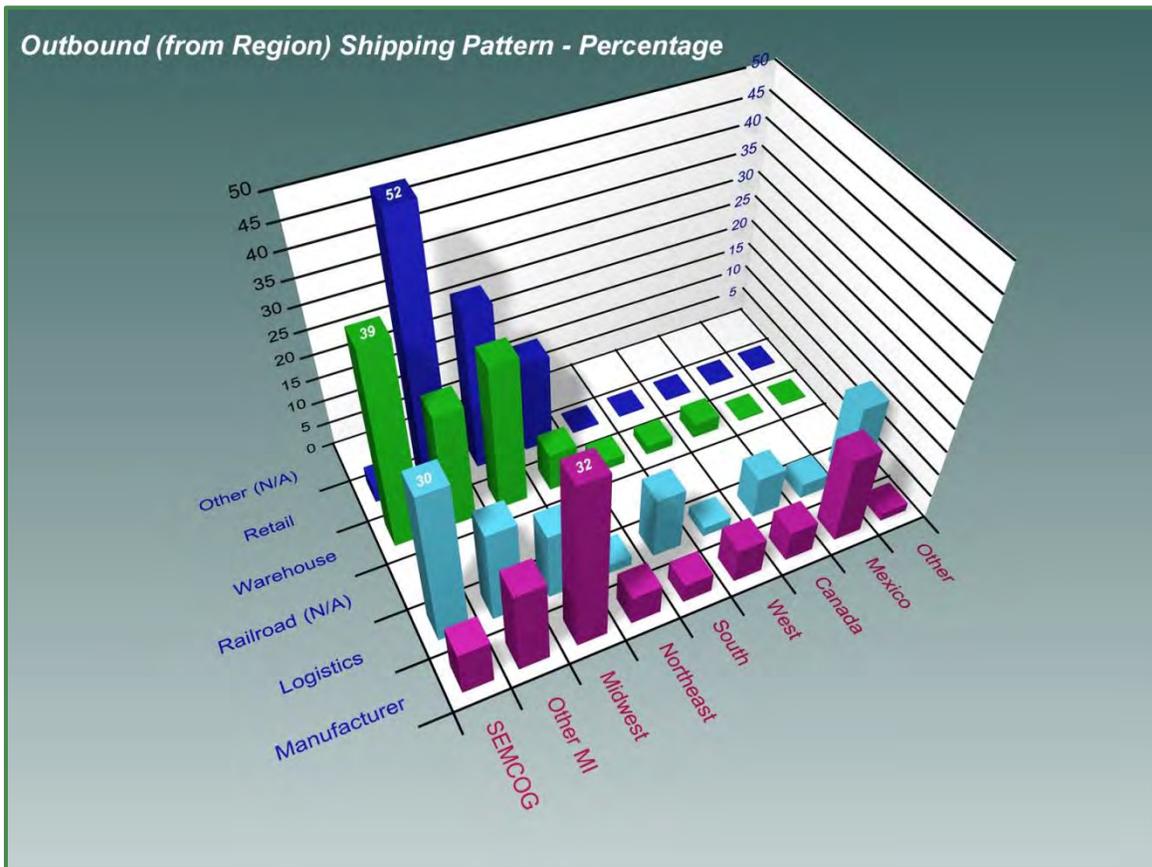
The outbound freight shipping patterns are summarized in Table B-1; neither the railroads nor those companies in the “other” category provided information in this area.

The logistics, warehousing, and retailing respondents indicated they ship 47 to 60 percent of their product within Michigan. The manufacturers make 25 percent of their shipments to places in Michigan and another 32 percent to areas in the Midwest. These same companies indicate 19 percent of their shipments are to Mexico. On the other hand, manufacturers, as well as all other respondents, showed fewer than ten percent of their shipments are to Canada.

Table B-1
Outbound (from Region) Shipping Pattern – Percentage

| Type | SEMCOG | Other MI | Midwest | Northeast | South | West | Canada | Mexico | Other |
|--------------|--------|----------|---------|-----------|-------|------|--------|--------|-------|
| Manufacturer | 9 | 16 | 32 | 6 | 4 | 7 | 5 | 19 | 2 |
| Logistics | 30 | 17 | 12 | 2 | 11 | 2 | 8 | 3 | 15 |
| Railroad | NA | NA | NA | NA | NA | NA | NA | NA | NA |
| Warehouse | 39 | 21 | 25 | 8 | 2 | 2 | 3 | 0 | 0 |
| Retail | 3 | 52 | 27 | 21 | 0 | 0 | 0 | 0 | 0 |
| Other | NA | NA | NA | NA | NA | NA | NA | NA | NA |

Source: The Corradino Group of Michigan, Inc.

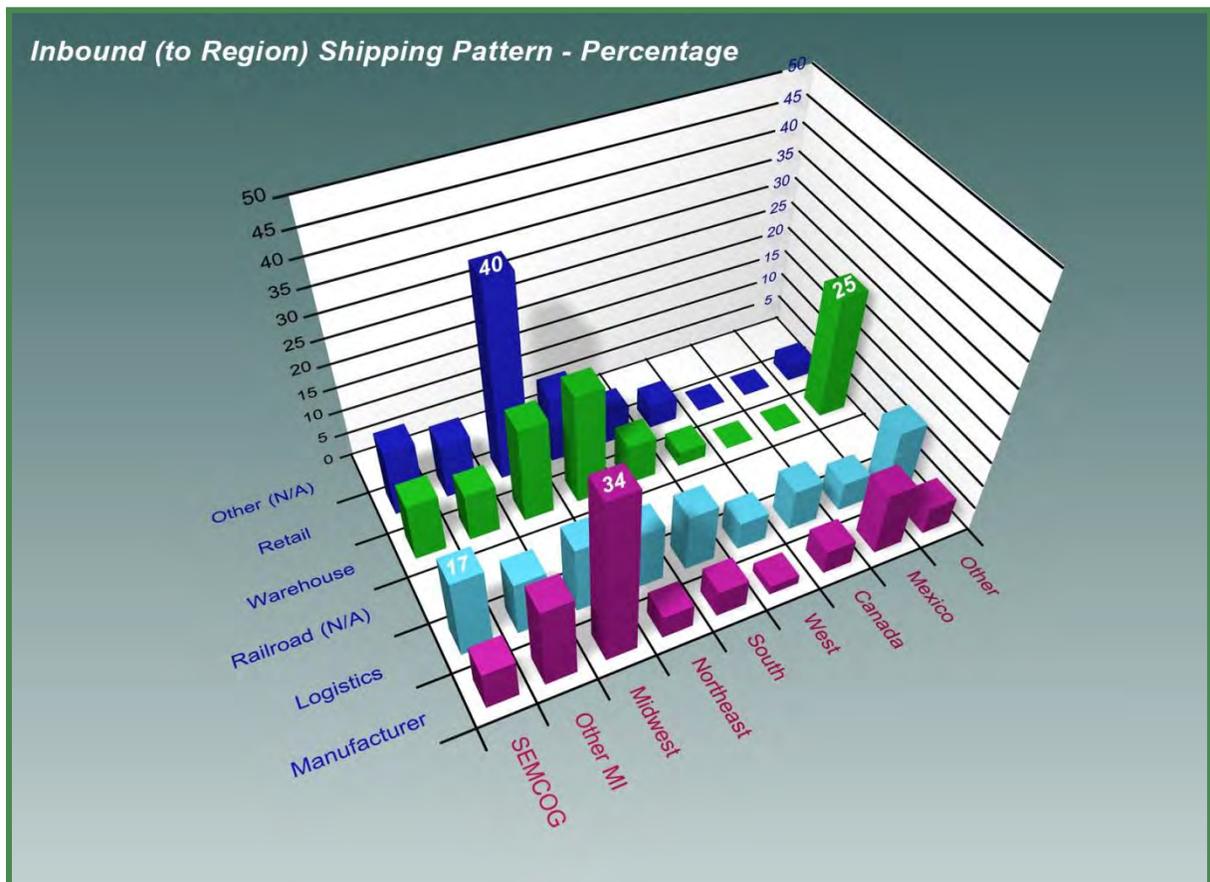


Shipments received by the survey respondents (Table B-2) indicate almost the mirror image of the outbound shipment pattern. For manufacturers, about 20 percent of their shipments come from places in Michigan, and one-third from the Midwest. Five percent came from Canada and 13 percent from Mexico. Six percent came from locations such as China.

Table B-2
Inbound (to Region) Shipping Pattern – Percentage

| Type | SEMCOG | Other MI | Midwest | Northeast | South | West | Canada | Mexico | Other |
|--------------|--------|----------|---------|-----------|-------|------|--------|--------|-------|
| Manufacturer | 12 | 17 | 34 | 5 | 6 | 2 | 5 | 13 | 6 |
| Logistics | 17 | 12 | 14 | 12 | 12 | 6 | 8 | 6 | 13 |
| Railroad | NA | NA | NA | NA | NA | NA | NA | NA | NA |
| Warehouse | 12 | 10 | 20 | 23 | 7 | 3 | 0 | 0 | 25 |
| Retail | 13 | 12 | 40 | 14 | 13 | 5 | 0 | 0 | 3 |
| Other | NA | NA | NA | NA | NA | NA | NA | NA | NA |

Source: The Corradino Group of Michigan, Inc.



Between 20 and 23 percent of the warehouseers' shipments come from each of the Northeast and the Midwest sections of the U.S., respectively. Retailer respondents receive 40 percent from the Midwest, and another 25 percent from Michigan. Very little (3%) comes from outside the U.S. Warehouseers receive one-quarter of their shipments from outside the U.S.

The survey indicates products shipped to Michigan locations by logistics operations represent 29 percent of the total. Twelve to 14 percent each come from the Midwest, northeast, and southern sections of the U.S. The same amount (13%) is received from outside the U.S., e.g. Asia, Europe, the Middle East, and South and Central America.

When asked about growth in the next five years, neither the railroads nor the "other" respondents provided information (Table B-3). The most aggressive forecast is 54 percent by the warehouse respondents. All others expect five-year growth of 18 to 31 percent.

Table B-3
Growth Expectations

| Type | % Growth Five Years | % Growth 5-20 Years |
|--------------|---------------------|---------------------|
| Manufacturer | 24 | 71 |
| Logistics | 31 | 46 |
| Railroad | NA | NA |
| Warehouse | 54 | NA |
| Retail | 18 | 30 |
| Other | NA | NA |

Source: The Corradino Group of Michigan, Inc.

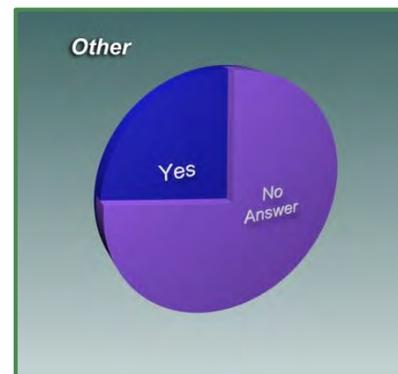
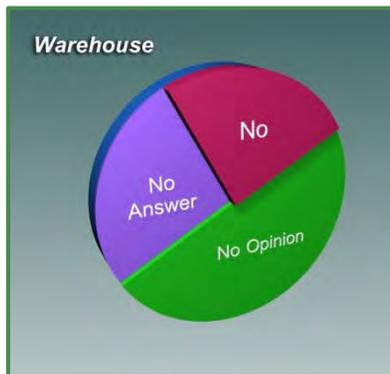
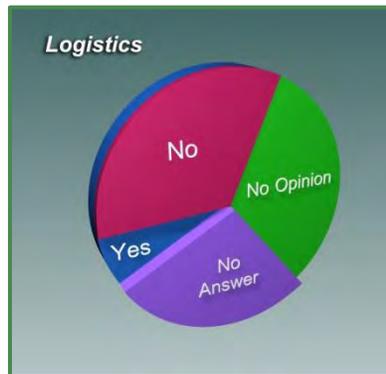
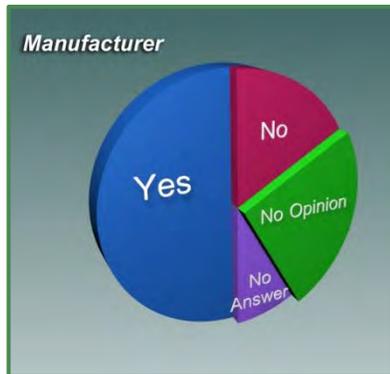
Growth projections for the five- to 20-year future were only provided by the manufacturers, logistics operations, and retailers. The manufacturers were as optimistic for this period as they were for the next five years.

Five survey questions dealt with the economic relationship of freight. The first question is: "Are the existing intermodal terminals and inland ports sufficient to attract businesses specializing in the movement of goods, warehousing, and logistics functions?" The most positive response (Yes = 6; No = 2; No Opinion = 3; and, No Response = 1) was from the manufacturers (Table B-4). The least positive response was from the logistics operations (1 "Yes" reply out of 18 responses). It is noteworthy that on this, and the other "economic" issues, close to half of the respondents did not answer or had "no opinion."

Table B-4
Is Existing Intermodal Sufficient to Attract Business?

| Type | Yes | No | No Opinion | No Answer |
|--------------|-----|----|------------|-----------|
| Manufacturer | 6 | 2 | 3 | 1 |
| Logistics | 1 | 6 | 6 | 5 |
| Railroad | 1 | 1 | 0 | 1 |
| Warehouse | 0 | 1 | 2 | 1 |
| Retail | 1 | 0 | 2 | 0 |
| Other | 2 | 0 | 0 | 5 |

Source: The Corradino Group of Michigan, Inc.



The next “economic” issue dealt with the relationship of freight movement to job creation (Table B-5). Again, the manufacturers were the most positive; the logistics respondents were the least positive. The same pattern appears when asking about the match between infrastructure and economic needs (Table B-6).

Table B-5
Relationship of Freight and Job Creation

| Type | Good | Neutral | Poor | No Opinion | No Answer |
|--------------|------|---------|------|------------|-----------|
| Manufacturer | 5 | 4 | 0 | 2 | 1 |
| Logistics | 2 | 3 | 4 | 5 | 4 |
| Railroad | 1 | 1 | 0 | 0 | 1 |
| Warehouse | 0 | 1 | 0 | 2 | 1 |
| Retail | 1 | 0 | 0 | 2 | 0 |
| Other | 0 | 0 | 1 | 1 | 5 |

Source: The Corradino Group of Michigan, Inc.

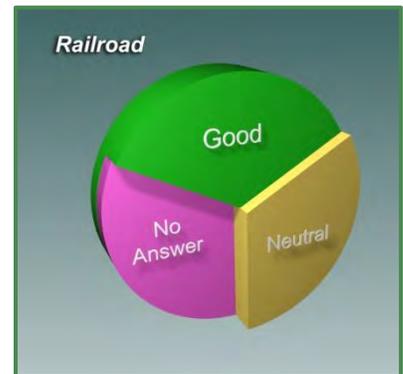
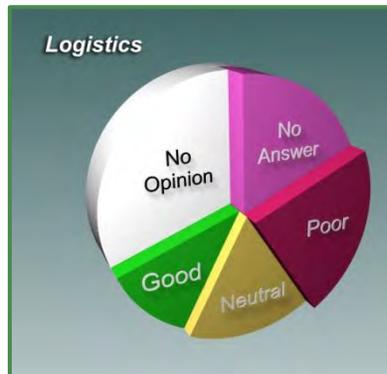
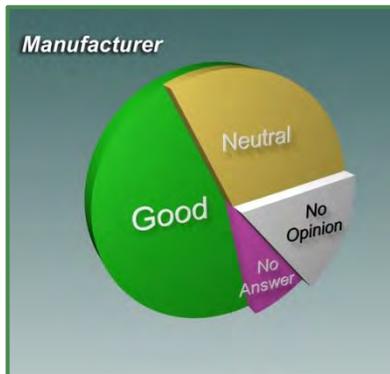
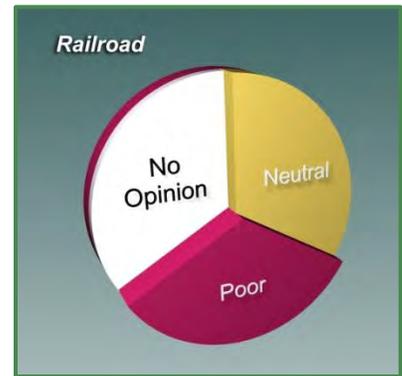


Table B-6
Match of Infrastructure and Economic Needs

| Type | Good | Neutral | Poor | No Opinion | No Answer |
|--------------|------|---------|------|------------|-----------|
| Manufacturer | 5 | 3 | 1 | 2 | 1 |
| Logistics | 2 | 4 | 1 | 5 | 6 |
| Railroad | 0 | 1 | 1 | 0 | 1 |
| Warehouse | 0 | 0 | 1 | 2 | 1 |
| Retail | 0 | 1 | 0 | 2 | 0 |
| Other | 1 | 0 | 0 | 1 | 5 |

Source: The Corradino Group of Michigan, Inc.

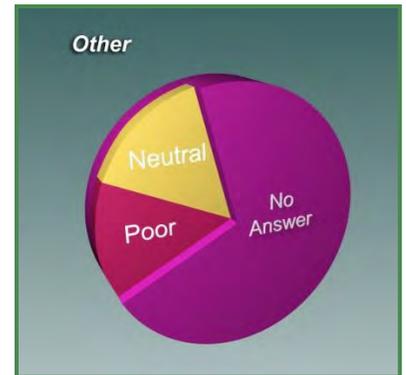
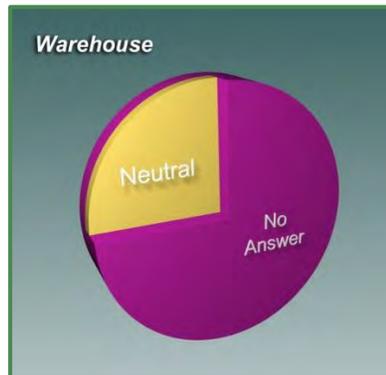
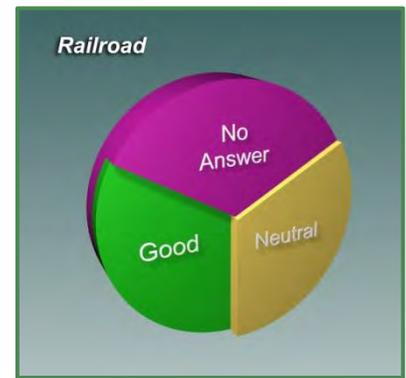
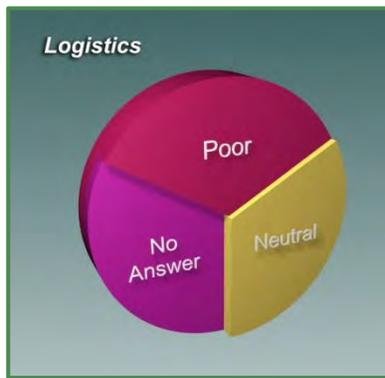
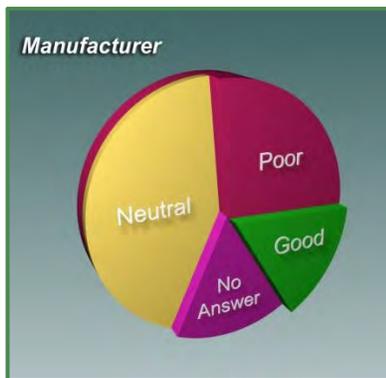


Questions were asked about public sector and private sector support of freight. None of the logistics, warehouse, retailers, or “other” respondents indicated there was good support (Table B-7) of the public sector for freight transportation system development.

**Table B-7
Public Sector’s Support of Freight**

| Type | Good | Neutral | Poor | No Opinion | No Answer |
|--------------|------|---------|------|------------|-----------|
| Manufacturer | 2 | 5 | 3 | 0 | 2 |
| Logistics | 0 | 6 | 6 | 0 | 6 |
| Railroad | 1 | 1 | 0 | 0 | 1 |
| Warehouse | 0 | 1 | 0 | 0 | 3 |
| Retail | 0 | 1 | 1 | 0 | 1 |
| Other | 0 | 1 | 1 | 0 | 5 |

Source: The Corradino Group of Michigan, Inc.



When it comes to private sector support of freight, the responses were more balanced (Table B-8) with about as much positive as negative reaction.

Table B-8
Private Sector's Support of Freight

| Type | Good | Neutral | Poor | No Opinion | No Answer |
|--------------|------|---------|------|------------|-----------|
| Manufacturer | 3 | 4 | 3 | 0 | 2 |
| Logistics | 3 | 5 | 3 | 0 | 7 |
| Railroad | 1 | 1 | 0 | 0 | 1 |
| Warehouse | 0 | 1 | 0 | 0 | 3 |
| Retail | 0 | 1 | 1 | 0 | 1 |
| Other | 1 | 1 | 0 | 0 | 5 |

Source: The Corradino Group of Michigan, Inc.



The 47 survey respondents were asked to "grade," both now and in the future, the degree to which freight transportation issues affect their business. Tables B-9A through B-9F illustrate the responses by industry sector. For the current situation, only "high incoming delivery cost" rises to a concern of significance for manufacturers (a value greater than 3). For logistics operations, only "paperwork at the border" is an issue of some concern. Railroads are concerned most about the lack of rail access. Warehouse, and those respondents in the "other" category, are concerned about delivery costs. Additionally, those in the "other" category are concerned about lack of rail access and poor access to interstates.

For the future, the concerns generally mirror those in the current situation, with the following additions. Logistics operations are concerned about paperwork at the border; railroads and warehouseers are concerned about poor access to interstates.

Other questions in the survey asked about factors which affect the **competitiveness** of the businesses surveyed; **impediments to their growth**; and, **the single change to freight infrastructure most vital** to the respondent's industry. These questions were purposefully left open ended to allow freight transportation issues to be placed in the context of other business priorities.

On the **competitiveness** issue:

- Manufacturers indicated repeatedly the key issues are price, quality/reliability of products they provide, their cost, and technological innovation.
- Logistics operators cited price plus the need for skilled labor, facility infrastructure, and fewer government rules/regulations.
- Railroads cited federal rules/regulations and connectivity as items most affecting their competitiveness.
- For warehouseers, price/cost was, again, a major factor. The same is true for retailers along with the quality of the shopping experience.

In discussing **impediments to their growth**:

- Manufacturers focused on the need for skilled labor, access to markets, and access to capital, as well as rail access and cost/rates.
- Logistics operators were most focused on the need for skilled labor/truck drivers and government rules/regulations as impeding their growth.
- The railroad respondents cited both connectivity and government rules/regulations as impediments to growth – the same factors that affect their competitiveness.
- Warehouseers cited the overall condition of the economy as the principal impediment to their growth. They also note the effect of market changes due to technological innovations.
- The retailers indicate the pace of construction, especially housing, is key to their growth.

When discussing the **single change to freight infrastructure that is most vital to their industry**:

- Manufacturers indicated the need for a new bridge/better access to Canada. Likewise, logistics operators focused on expanded border facilities and Customs. They also noted a need for better intermodal facilities and improved roads.
- The railroad respondents focused on a new double-stack tunnel to Canada in the Detroit-Windsor area plus more rail/road grade separations.
- Both warehouseers and retailers called for improved road conditions.

Table B-9A

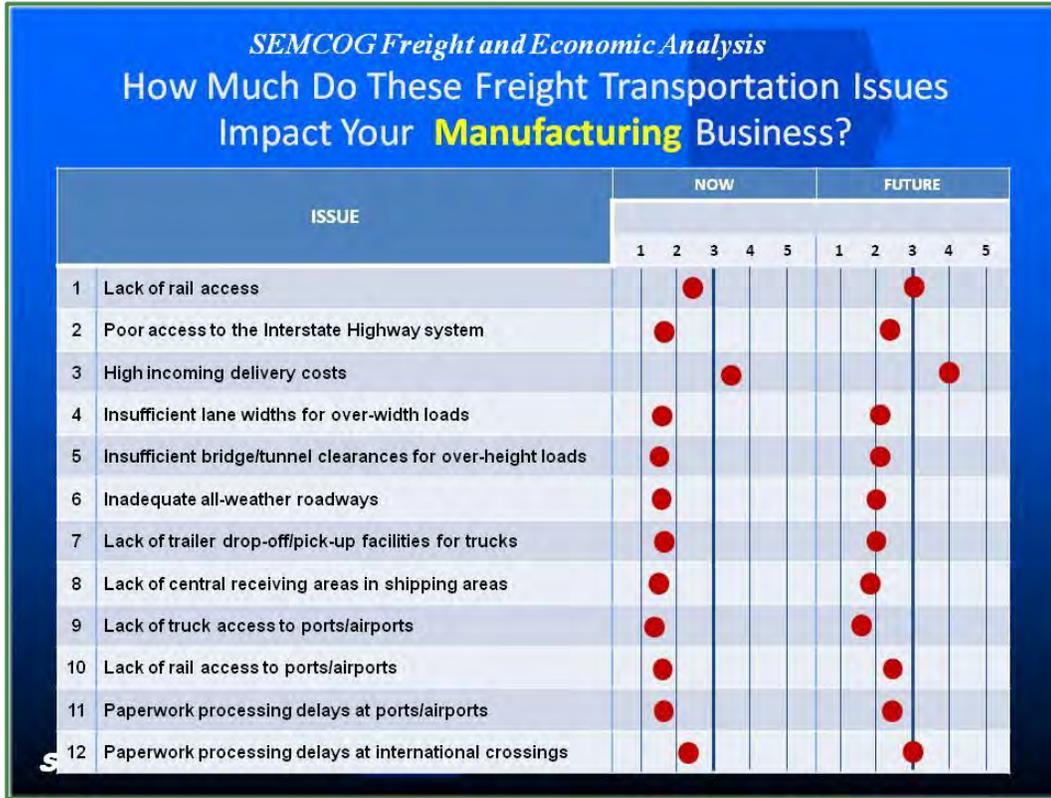


Table B-9B

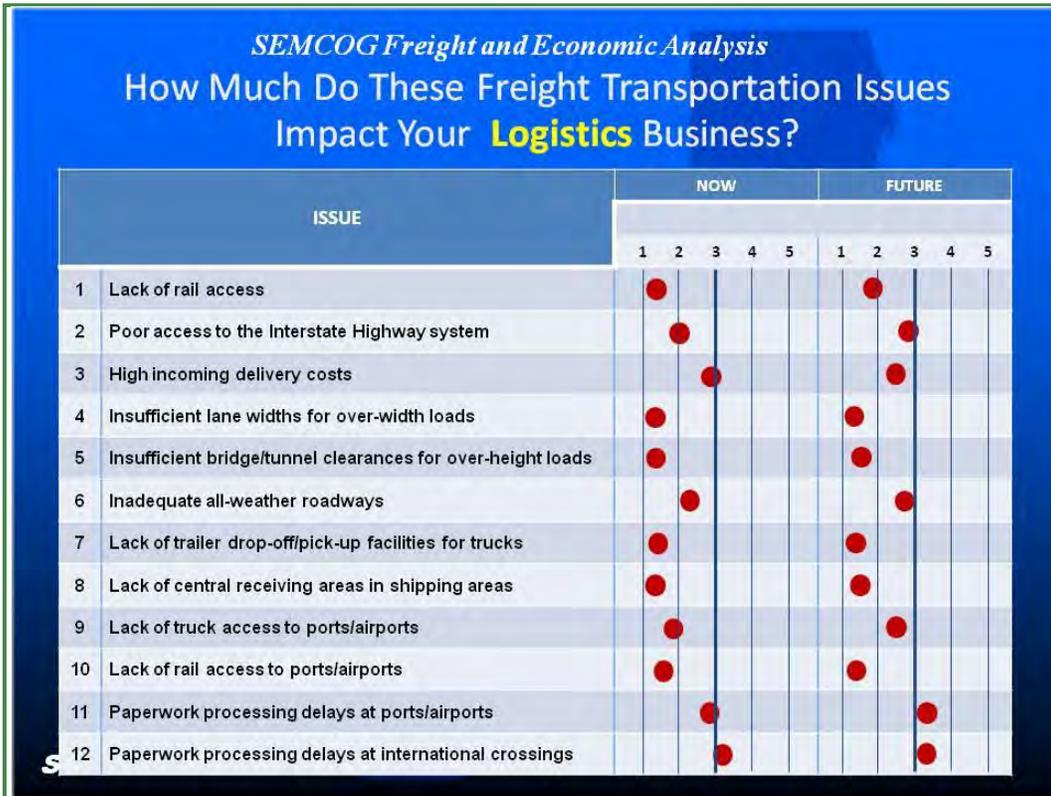


Table B-9C

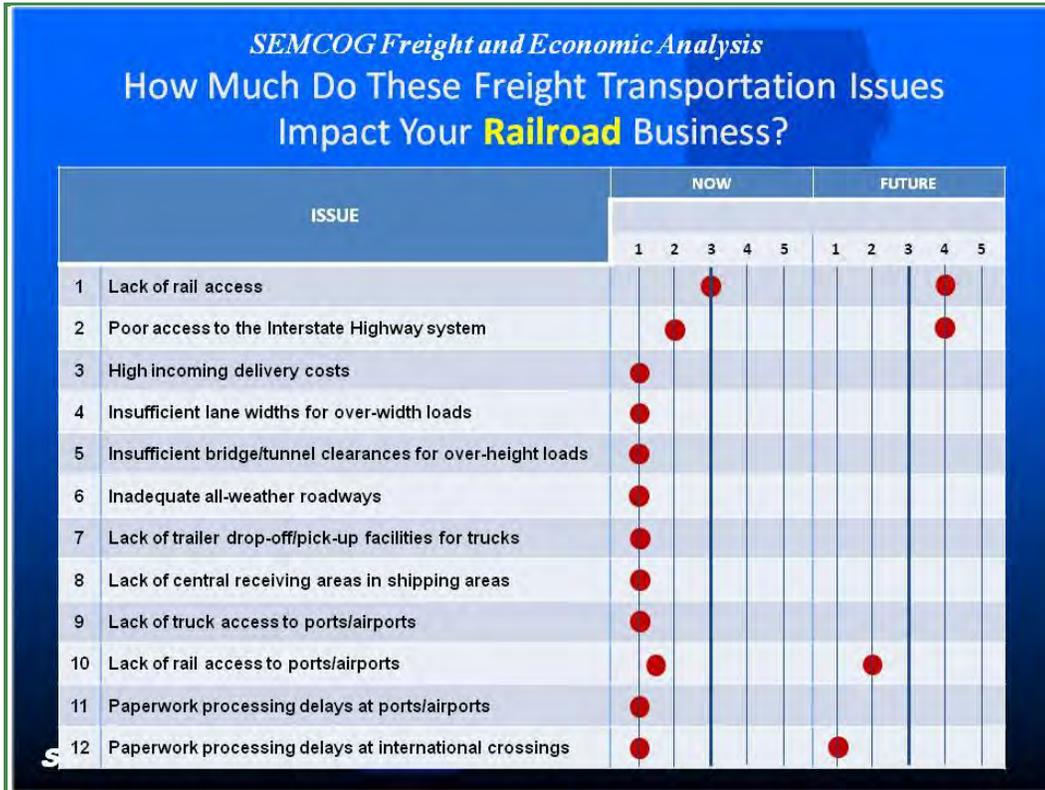


Table B-9D

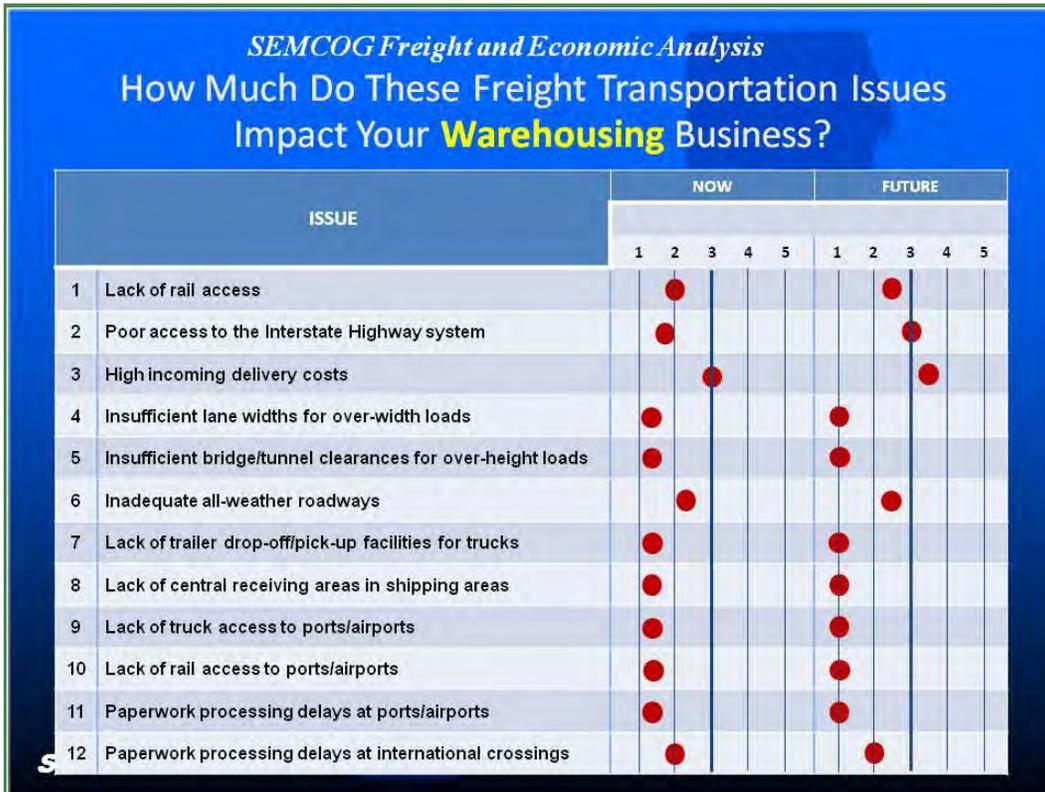


Table B-9E

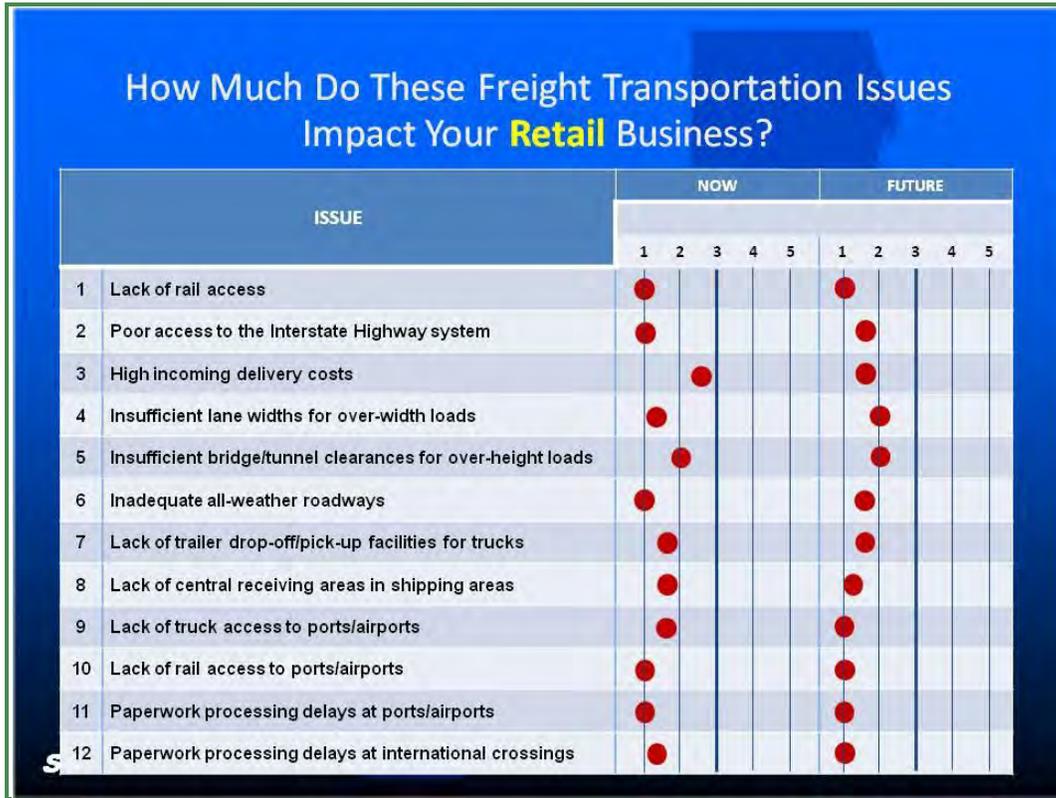
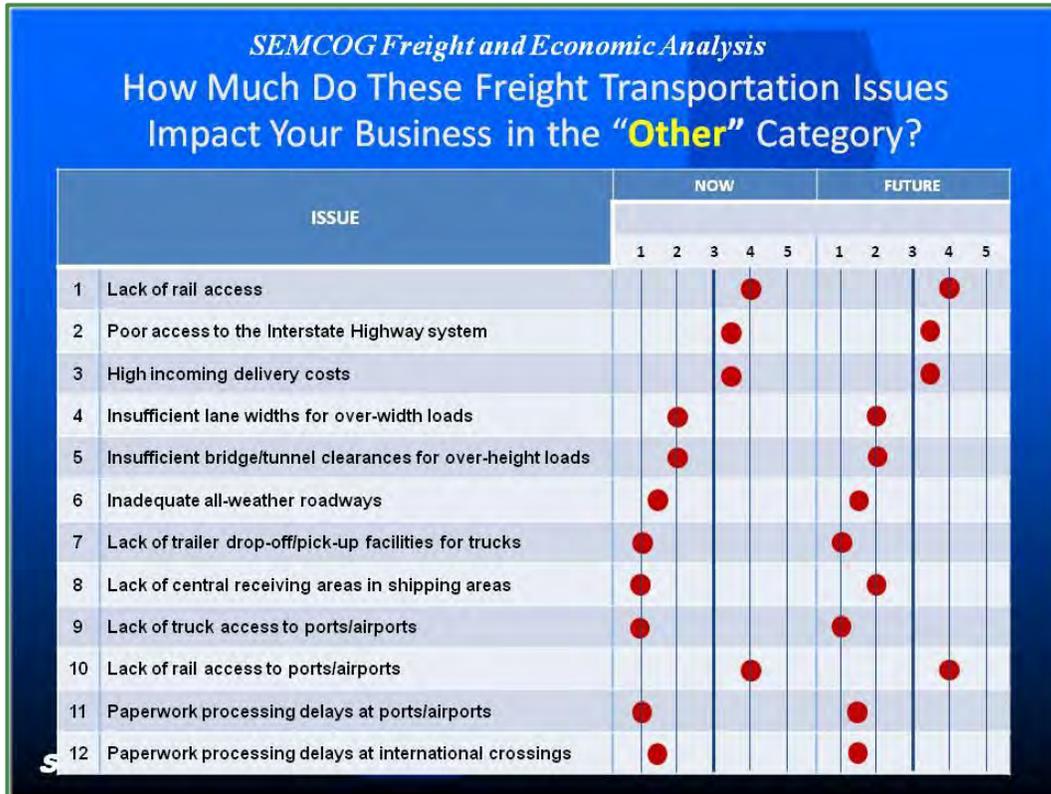


Table B-9F



The survey respondents were asked to identify transportation bottlenecks/choke points in Southeast Michigan or in nearby areas in Michigan, Ohio, or Ontario. About half of those surveyed responded (24 of 47). Figure B-2 displays the results. The majority of locations cited are in the regional core (between I-94 and the Detroit River, from the area of I-75 at I-94 downriver to Ecorse), several of which were noted more than once. Highway-related issues are mentioned most but rail choke points are also very prevalent in the responses. Examples include:

- Highway
 - Condition of Roads
 - Detroit River Crossings
 - Congestion at freeway interchanges (e.g. I-275/I-696/I-96 and I-94/I-96)
 - Congestion on freeway corridors
 - Local access from business location to freeway interchange
- Rail
 - The Livernois-Junction Yard area and the rail connections to it such as at:
 - ✓ Delray Junction Area
 - ✓ Vickers Interlocker
 - Sibley Road/Pennsylvania Road Area

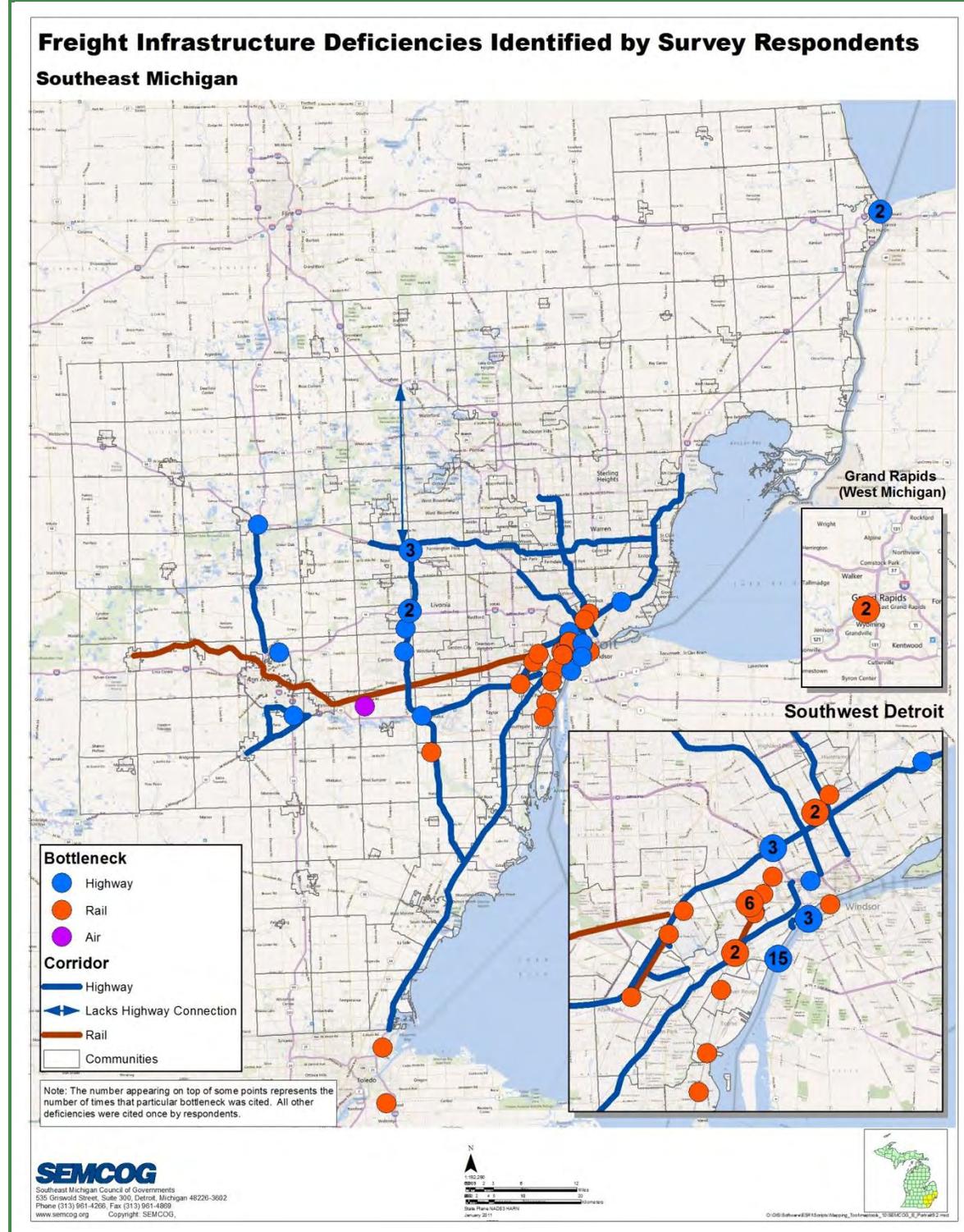
The most frequently-mentioned bottlenecks/choke points are the Ambassador Bridge for highway and the Livernois-Junction Yard area for rail. SEMCOG and the Michigan Department of Transportation (MDOT) are aware of these particular bottlenecks and have proposed relief through the New International Trade Crossing and the Detroit Intermodal Freight Terminal project, respectively. One airport issue was cited -- the runway length at Willow Run Airport being long enough to handle fully-loaded large aircraft.

Figure B-2 below shows the location of all freight infrastructure deficiencies cited by respondents, with numbers indicating the times a particular bottleneck was named. This map is not intended to show current transportation plans and projects. Many locations on the map are priorities in current transportation plans; others, such as a proposed freeway extension of M-5 in western Oakland County, have been specifically studied and turned down as an active option in the regional transportation plan. Other less expansive infrastructure and operational changes could still be considered to address freight mobility concerns in these areas.

When non-infrastructure issues were cited by the respondents, the most frequently mentioned are labor shortages (truck drivers), cost (particularly the price of fuel), and government regulations (from hours of service for trucking to complications in licensing/permitting).

Figure B-2

Freight Infrastructure Deficiencies Identified by Survey Respondents



In regards to the regulatory environment, the principal concern is with Customs processing at the U.S.-Canadian border. For many smaller and medium freight motor carriers, the Free and Secure Trade program (FAST), which is designed to securely expedite freight clearance across the U.S.-Canadian border, does not solve the problem because it neither addresses the issue queue times that precede FAST designated customs booths at the border crossings nor truck driver turnover rates. Other regulatory concerns are the processes for gaining a permit for oversized/overweight loads at federal, state, and local levels. The redundancy is a cost issue for the freight industry. A recent tightening of the national hours-of-service rules is also a major concern to the motor carrier shipping business, limiting the delivery range a driver can reliably reach in one day. Finally, conversations with those in the waterborne transportation industry indicate that Michigan's ballast water law has shifted Michigan-bound international shipments to neighboring states with less restrictive laws.

Appendix B-1 FREIGHT INDUSTRY SURVEY FORM



Southeast Michigan Council of Governments Survey

Please contact Trevor Brydon of the Southeast Michigan Council of Governments (e-mail: Brydon@semcog.org; phone: 313.324.3336) with questions or to verify the authenticity of this survey.

Purpose:

Freight transportation is essential to our economic competitiveness. Please help us make wise investment decisions by completing this survey.

It should take 15 to 20 minutes to answer 20 questions. A member of the study's team is available to offer assistance by sending an email to _____.

When you have completed the survey, please e-mail it to _____ or go to <https://www.surveymonkey.com/s/3GBFNZK> to complete the survey on-line. Your response will be held confidential. *Thank you!*



Sponsored by:

Southeast Michigan Council of Governments (SEMCOG)

Conducted by:

SEMCOG and its consultant, The Corradino Group of Michigan (Corradino)

1. The following is the information we have on file about your company. Please correct any errors.

Company name: _____

Site address: _____

County: _____

This identifying information is for use in tabulating and accumulating responses for a report, which will not permit identification of your company.

2. Primary Product Shipment Destination(s).

a. Is your PRIMARY distribution site located in the SEMCOG area? Yes No

If not, where is your PRIMARY site located? _____

b. What factors influenced your decision to locate at the primary site? _____

c. What transportation factors influenced your decision to pick this location? _____



3. How many sites are operated by your business in the study area (see map above)?
Please identify the following for each site and indicate in the right-most column the primary site if it is in the SEMCOG area.

| Site | Address | No. of Employees | No. of Trucks Based at Site | No. of Rail Cars Handled at Site on Typical Day | Hours of Operation | Is this the PRIMARY SITE in the SEMCOG Area? |
|----------------|--------------------------|------------------|-----------------------------|---|--------------------|--|
| <i>Example</i> | | | | | | |
| Site B | XYZ Road, Defiance, Ohio | 400 | 42 | NA | 6 a.m. - 6 p.m. | |
| | | | | | | |
| | | | | | | |
| | | | | | | |

4. What is the MAIN focus of your business?

| | |
|---|-------------------------|
| <input type="checkbox"/> Logistics Service Provider | • What service? _____ |
| <input type="checkbox"/> Manufacturer | • Automotive _____ |
| | • Other _____ (specify) |
| <input type="checkbox"/> Retail Operator | |
| <input type="checkbox"/> Warehouse Distributor | |
| <input type="checkbox"/> Other _____ | (specify) |

5. What are the basic operational characteristics of your business?

a. What types of facilities do you operate? Please check ALL that apply.

Warehouse(s) Distribution Other (specify) _____

Break bulk and/or reconsolidation Local consolidation/deconsolidation Not applicable (skip to Question 6)

b. About how many square feet of warehousing space does your business have available in the SEMCOG area?

None (skip to Question 6) 25,000 to 49,999 100,000 to 199,999 500,000 to 749,999

Less than 10,000 50,000 to 74,999 200,000 to 299,999 750,000 and over

10,000 to 24,999 75,000 to 99,999 300,000 to 499,999

c. Is warehouse space leased or owned? _____

d. What percentage of the space is utilized on average over a year's time? _____%

e. What kinds of products are handled? Please check ALL that apply.

| Description | Description |
|---|--|
| <input type="checkbox"/> Apparel/Related Products | <input type="checkbox"/> Miscellaneous Manufactured Products |
| <input type="checkbox"/> Auto Products | <input type="checkbox"/> Freight -- All Kinds |
| <input type="checkbox"/> Beer/Alcohol | <input type="checkbox"/> Non-Electrical Machinery |
| <input type="checkbox"/> Chemicals or Allied Products | <input type="checkbox"/> Nonmetallic Minerals |
| <input type="checkbox"/> Clay, Concrete, Glass or Stone | <input type="checkbox"/> Ordnance or Accessories |
| <input type="checkbox"/> Coal, Petroleum, Gas | <input type="checkbox"/> Petroleum or Coal Products |
| <input type="checkbox"/> Electrical Equipment | <input type="checkbox"/> Primary Metal Products |
| <input type="checkbox"/> Equipment | <input type="checkbox"/> Printed Matter |
| <input type="checkbox"/> Defense/Military Products | <input type="checkbox"/> Pulp, Paper, Allied Products |
| <input type="checkbox"/> Fabricated Metal Products | <input type="checkbox"/> Refrigerated Products |
| <input type="checkbox"/> Farm Products | <input type="checkbox"/> Renewable Energy |
| <input type="checkbox"/> Food or Kindred Products | <input type="checkbox"/> Rubber or Plastic Products |
| <input type="checkbox"/> Forest Products | <input type="checkbox"/> Shoes |
| <input type="checkbox"/> Fresh Fish/Marine Products | <input type="checkbox"/> Soft Drinks/Juices/Nonalcoholic Beverages |
| <input type="checkbox"/> Furniture or Fixtures | <input type="checkbox"/> Textile Mill Products |
| <input type="checkbox"/> Instruments, Photo/Optical | <input type="checkbox"/> Tile |
| <input type="checkbox"/> Leather or Leather Products | <input type="checkbox"/> Tobacco Products |
| <input type="checkbox"/> Lumber or Wood Products | <input type="checkbox"/> Transportation Equipment |
| <input type="checkbox"/> Medical Equipment | <input type="checkbox"/> Waste or Scrap Materials |
| <input type="checkbox"/> Metallic Ores | <input type="checkbox"/> Other (specify) _____ |

f. What types of shipments are handled by your warehouse and shipping facilities during normal business activity? Please check ALL that apply.

| Description | Description |
|--|--|
| <input type="checkbox"/> Air freight consolidations | <input type="checkbox"/> Parcels |
| <input type="checkbox"/> Bulk commodity shipments in rail cars | <input type="checkbox"/> Rail |
| <input type="checkbox"/> Hazardous materials | <input type="checkbox"/> Shipping containers |
| <input type="checkbox"/> Intermodal | <input type="checkbox"/> Truckload (TL) |
| <input type="checkbox"/> Less-than-truckload (LTL) | <input type="checkbox"/> Waste materials |
| <input type="checkbox"/> Mail | <input type="checkbox"/> Other (specify) _____ |



6. Please indicate destinations and origins of your product shipments.

a. What percentage of your products is shipped to each of the following regions (see map above)?

| Region | % |
|----------------------------------|-------------|
| Within SEMCOG Area | |
| Inside Michigan | |
| Midwestern U.S. Outside MI. | |
| Northeastern U.S. | |
| Southern U.S. | |
| Western U.S. (includes Alaska) | |
| Canada | |
| Mexico | |
| Other (_____) name location | |
| Other (_____) name location | |
| TOTAL | 100% |

b. What percentage of your input is received from each of the following regions (see map above)?

| Region | % |
|----------------------------------|-------------|
| Within SEMCOG Area | |
| Inside Michigan | |
| Midwestern U.S. Outside MI. | |
| Northeastern U.S. | |
| Southern U.S. | |
| Western U.S. (includes Alaska) | |
| Canada | |
| Mexico | |
| Other (_____) name location | |
| Other (_____) name location | |
| TOTAL | 100% |

7. Please tell us about the accessibility of your PRIMARY site if it is located in the SEMCOG area, as indicated in the response to Question 2a. If your PRIMARY site is not located in the SEMCOG area, please skip to Question 10.

| | | | |
|--|------------------------------|-----------------------------|-------------------------------------|
| a. Do you have access to a rail siding at your primary site? | <input type="checkbox"/> Yes | <input type="checkbox"/> No | |
| b. Do you have access to truck loading/unloading docks at your primary site? | <input type="checkbox"/> Yes | <input type="checkbox"/> No | |
| c. Is warehousing usually done at this site? | <input type="checkbox"/> Yes | <input type="checkbox"/> No | |
| d. Would better rail service possibly benefit this site? | <input type="checkbox"/> Yes | <input type="checkbox"/> No | <input type="checkbox"/> Don't Know |
| e. Would your site benefit from improved highway access? | <input type="checkbox"/> Yes | <input type="checkbox"/> No | <input type="checkbox"/> Don't Know |
| If "yes" to e., what is your suggested improvement? | | | |
| _____ | | | |
| _____ | | | |
| _____ | | | |
| _____ | | | |
| _____ | | | |
| _____ | | | |

8. Please tell us about the highway transportation characteristics of your business.

| | |
|----|---|
| a. | On an average day, how many loaded highway vehicles does your business place in service, if your PRIMARY site is located in the SEMCOG area? |
| | <input type="checkbox"/> Does not apply (skip to Question 9) <input type="checkbox"/> Fewer than 10 <input type="checkbox"/> 50 to 99 <input type="checkbox"/> 10 to 24 <input type="checkbox"/> 100 to 199 <input type="checkbox"/> 25 to 49 <input type="checkbox"/> 200+ |
| b. | Who operates the vehicles? Check all that apply. |
| | <input type="checkbox"/> Our own drivers <input type="checkbox"/> Common Carrier <input type="checkbox"/> Contract Carrier <input type="checkbox"/> Private Fleet <input type="checkbox"/> Renter <input type="checkbox"/> Other (specify) _____ |
| c. | What types of trucks are used by your business? Check all that apply. |
| | <input type="checkbox"/> Delivery vans <input type="checkbox"/> Flatbeds <input type="checkbox"/> Reefers <input type="checkbox"/> Vans <input type="checkbox"/> Hoppers <input type="checkbox"/> Tanks <input type="checkbox"/> Autoracks <input type="checkbox"/> Container <input type="checkbox"/> Other (specify) _____ <input type="checkbox"/> Straight trucks <input type="checkbox"/> Tractors and semi-trailers |
| d. | On average, how many miles does your typical vehicle travel? |
| | Daily _____ Annually _____ |

9. Please tell us about the rail characteristics of your business.

| | | | |
|----|--|---|--|
| a. | On an average day, how many loaded rail vehicles does your business place in service, if the PRIMARY site is located in the SEMCOG area? | | |
| | <input type="checkbox"/> Does not apply (skip to Question 10) | <input type="checkbox"/> Fewer than 10 | <input type="checkbox"/> 50 to 99 |
| | | <input type="checkbox"/> 10 to 24 | <input type="checkbox"/> 100 to 199 |
| | | <input type="checkbox"/> 25 to 49 | <input type="checkbox"/> 200+ |
| b. | Who operates the vehicles? Check ALL that apply. | | |
| | <input type="checkbox"/> Our business | <input type="checkbox"/> Contract Carrier | <input type="checkbox"/> Other (specify) _____ |
| c. | What types of rail vehicles are used by your business? Check all that apply. | | |
| | <input type="checkbox"/> Flatbeds | <input type="checkbox"/> Hoppers | <input type="checkbox"/> Containers |
| | <input type="checkbox"/> Tankers | | |
| d. | On average, how many rail-car miles does your typical rail vehicle as listed above travel? | | |
| | Daily _____ Annually _____ | | |

10. We would like to understand how to help your business grow.

| | |
|----|--|
| a. | What determines the competitiveness of businesses in your industry? |
| | _____ |
| | _____ |
| b. | What is the primary impediment to growth of your business (e.g., freight access, skilled labor pool, market access)? |
| | _____ |
| | _____ |
| c. | Do you have long-range plans for growth in your business to include increased shipping requirements? |
| | <input type="checkbox"/> Yes <input type="checkbox"/> No If you answered NO, skip to Question #11. If yes, please continue to 10d and 10e. |
| d. | What percent growth do you anticipate in the next 5 years? _____ % |
| e. | What percent growth do you anticipate in the 5- to 20-year period? _____ % |

11. Please indicate on a scale from 1 (None), to 5 (Plenty) with a circle how much these freight transportation issues impact your business.

| a. Issue | | b. Is this now a problem for your firm? | c. How important will this issue be in the future? |
|----------|---|---|--|
| 1 | EXAMPLE Lack of rail access | 1 2 3 4 5 | 1 2 3 4 5 |
| 1 | Lack of rail access | 1 2 3 4 5 | 1 2 3 4 5 |
| 2 | Poor access to the Interstate Highway system | 1 2 3 4 5 | 1 2 3 4 5 |
| 3 | High incoming delivery costs | 1 2 3 4 5 | 1 2 3 4 5 |
| 4 | Insufficient lane widths for over-width loads | 1 2 3 4 5 | 1 2 3 4 5 |
| 5 | Insufficient bridge/tunnel clearances for over-height loads | 1 2 3 4 5 | 1 2 3 4 5 |
| 6 | Inadequate all-weather roadways | 1 2 3 4 5 | 1 2 3 4 5 |
| 7 | Lack of trailer drop-off/pick-up facilities for trucks | 1 2 3 4 5 | 1 2 3 4 5 |
| 8 | Lack of central receiving areas in shipping areas | 1 2 3 4 5 | 1 2 3 4 5 |
| 9 | Lack of truck access to ports/airports | 1 2 3 4 5 | 1 2 3 4 5 |
| 10 | Lack of rail access to ports/airports | 1 2 3 4 5 | 1 2 3 4 5 |
| 11 | Paperwork processing delays at ports/airports | 1 2 3 4 5 | 1 2 3 4 5 |
| 12 | Paperwork processing delays at international crossings | 1 2 3 4 5 | 1 2 3 4 5 |
| 13 | Other (specify below) _____ | 1 2 3 4 5 | 1 2 3 4 5 |

11a. Other freight transportation issues:

11b. Of the above, which is the PRIMARY issue impacting your business?

_____ (specify)

11c. Why?

| |
|------------------|
| Please elaborate |
| |
| |
| |

11d. In what way(s) would your business benefit if your PRIMARY issue were addressed?

| |
|------------------|
| Please elaborate |
| |
| |
| |

12. Are the existing intermodal terminals and inland ports sufficient to attract businesses specializing in the movement of goods, warehousing, and logistics functions?

| |
|--|
| Yes ____ No ____ No Opinion ____ Please elaborate below: |
| |
| |
| |

13. How do you assess the relationship between freight transportation facilities/policies and job creation?

| |
|--|
| Good ____ Neutral ____ Poor ____ No Opinion ____ |
| Please elaborate below: |
| |
| |

14. How do you assess the match between Southeast Michigan's existing freight transportation infrastructure and the needs of the SEMCOG area's industries?

| |
|--|
| Good ____ Neutral ____ Poor ____ No Opinion ____ |
| Please elaborate below: |
| |
| |

15. How would changes in the Michigan and Southeast Michigan regional economies affect the demand for freight transportation?

| |
|------------------|
| Please elaborate |
| |
| |

16. Please list, in priority order, where transportation bottlenecks or choke points exist in Southeast Michigan or in nearby areas in Michigan, Ohio, or Ontario.

| | | |
|----|----|----|
| 1. | 4. | 7. |
| 2. | 5. | 8. |
| 3. | 6. | 9. |

- 16a. Where, in priority order, do you anticipate bottlenecks or choke points to form in future years?

| | | |
|----|----|----|
| 1. | 4. | 7. |
| 2. | 5. | 8. |
| 3. | 6. | 9. |

17. What single change to freight infrastructure do you see as the most vital to your industry?

| |
|------------------|
| Please elaborate |
| |
| |

18. How do you assess the public sector's (governments at local, state, and federal levels) willingness/ability to support freight transportation system development?

| | | | |
|------------|---------------|------------|------------------------|
| Good _____ | Neutral _____ | Poor _____ | Please elaborate below |
| | | | |
| | | | |

19. How do you assess the private sector's willingness/ability to support freight transportation system development?

| | | | |
|-----------|--------------|-----------|------------------------|
| Good ____ | Neutral ____ | Poor ____ | Please elaborate below |
| | | | |
| | | | |
| | | | |

20. Do you have other ideas or solutions that should be considered or investigated further?

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

Thank you for your responses which will be reported in aggregate, so individual responses will be held confidential. Please email the survey to _____ or complete it online at <https://www.surveymonkey.com/s/3GBFNZK>.

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