

# Perceptions of Global Trade

September, 2011

# Agenda

➔ Background, Objectives, and Methodology

Detailed Findings

Executive Summary

Implications

Backup

# Background

- Perceptions of global trade are evolving due to:
  - ✓ the recently enacted National Export Initiative
  - ✓ changes in the global business economy, and
  - ✓ increased attention from government, third-party organizations, the business community, and media
- UPS seeks further insight on the issue and would like to determine U.S. Small and Medium businesses' (SMBs') current opinion of international trade. In addition, the company wants to further secure its position as a thought leader and expert resource on global trade and logistics
- To this end, UPS Public Relations commissioned the inaugural Perceptions of Global Trade survey for 2011\*, focusing on SMBs

\*The results in this report are for Public Relations purposes only and should be viewed with caution for other marketing purposes

# Business Issues

- Sustain the new UPS brand platform on logistics and global competitiveness, and differentiate the company as a global leader in this area
- Formulate and communicate UPS's POV on global trade, and enable the company to effectively contribute to national and global dialogue, thought leadership and third-party engagement
- Secure positive media coverage that reinforces UPS's key messages related to how global trade and logistics can help U.S. companies expand and compete
- Build new relationships with third-party experts and potential customers, positioning UPS as a partner for global Small and Medium businesses
  - ✓ Facilitate a tighter bond, interactive relationships, and higher loyalty among this vital audience

# Research Objectives

- Measure perceptions of global trade among U.S. Small and Medium businesses
- Identify the issues U.S. SMBs face that are barriers to global trade
  - ✓ What are the obstacles, and is exporting viewed as critical for future growth?
- Gauge how much trade U.S. Small and Medium businesses conduct both domestically and/or internationally
- Examine the differences in perception of global trade between SMBs that do not conduct global trade and those that do
- Obtain insight into whether Small and Medium businesses plan on increasing their export activities in the coming year

# Methodology

## Sample Frame

### U.S. Businesses

U.S. Small and Medium businesses engaged in selling domestically / internationally

## Screeners

n=3,352

## Completes

1,082 Completes

Small businesses - n=982

Medium businesses - n= 100

### Screeners

- Over 18 years old
- Company based in the U.S.
- Involved in strategic decision making
- Holds high-level title
- At least share in shipping/logistics decisions
- <500 full and part-time employees

- ✓ Online survey conducted from 8/11-8/19/11
- ✓ Sample Source: TNS Occupation and Industry Panel
- ✓ UPS was not identified as the sponsor of the research

# Analytic Notes

- **Audience Definitions:**

- ✓ **Total Respondents** (n=1,000): Total Rep Completes (Representation based on U.S. Census Bureau Business & Industry – company’s employee size)
  - ✓ **Small businesses** (n=982): 1-99 employees
  - ✓ **Medium businesses** (n=100 → includes augment): 100-499 employees
  - ✓ **Global Shippers** (n=245): Company has customers outside of U.S.
  - ✓ **Domestic Shippers** (n=755): Company does not have customers outside of U.S.
    - **Domestic Intenders** (n=26): Company does not have customers outside of U.S., but intends to within the next 12 months
    - **Domestic Non-Intenders** (n=729): Company does not have customers outside of U.S. and does not intend to within the next 12 months
  - ✓ **Industries**: Auto / Industrial / Manufacturing (n=41), Healthcare (n=53), High Tech / Electronics (n=39), Professional Services (n=295), Retail (n=126), & Other Industries (n=465)
- Where appropriate, statistical tests have been conducted between groups and circles are used to identify groups that are significantly higher than the comparison point at the 90% confidence level.
  - The minimum sample size recommended for analysis is n=50. Base sizes below n=50 are footnoted and should be interpreted with caution.

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# A quarter of U.S. SMBs currently ship to other countries, and only a few domestic-only shippers intend to export within the next year.

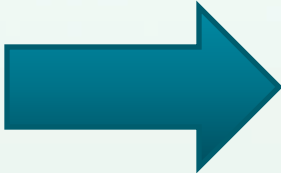
**Customer Base**  
Total Respondents (n=1,000)



Medium businesses, 48%  
(Small businesses, 24%)

The composition of the Global Shippers group has significantly more Medium businesses than the Domestic Shippers

Small businesses, 76%  
(Medium businesses, 52%)

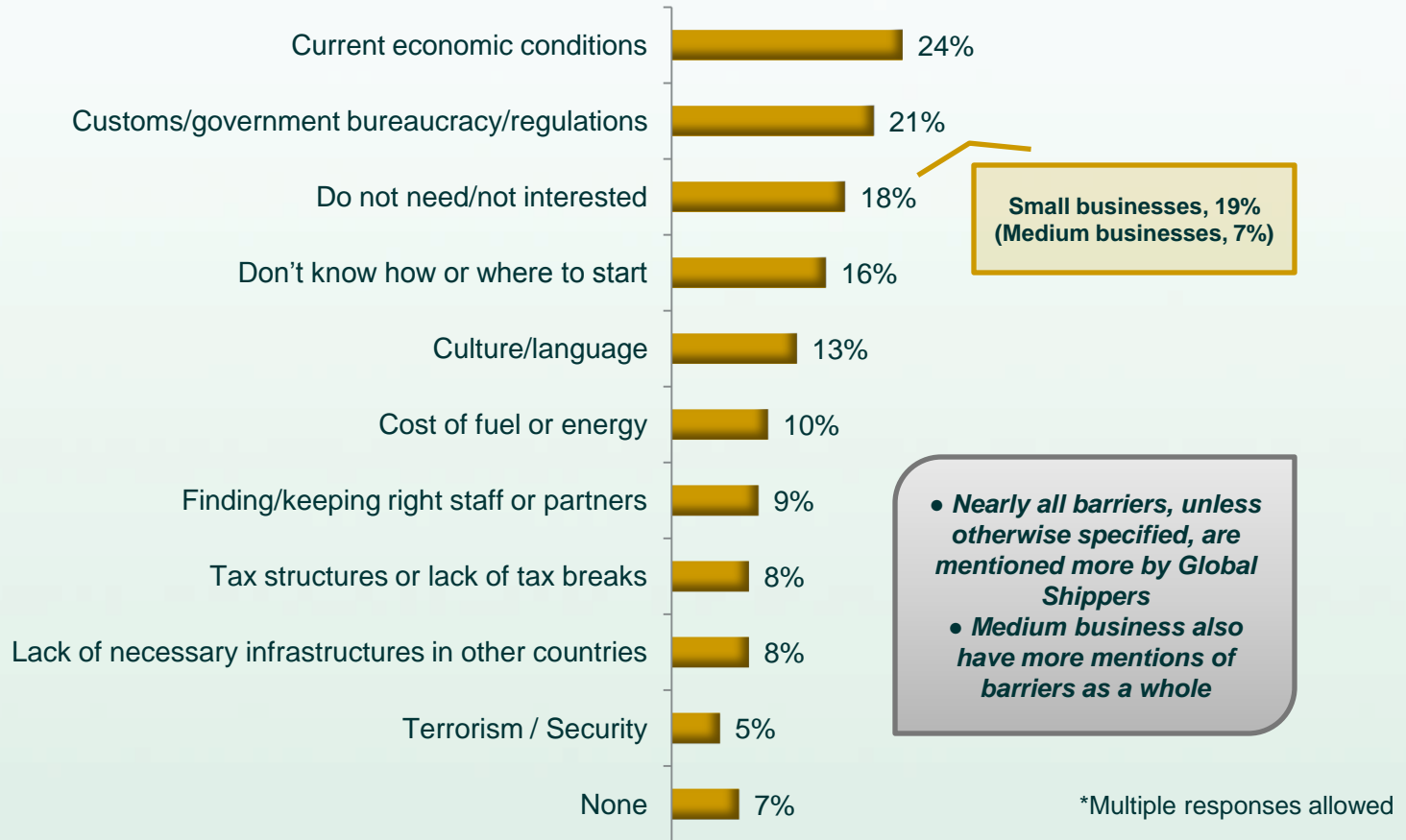


Only 3% of Domestic Shippers intend on exporting to other countries over the next year. Intenders are typically larger companies – similar to the current Global Shippers

S7. Does your company have customers outside the United States? Base: Total Respondents  
Q1. In the next 12 months, does your company intend to export to other countries? Base: Domestic Shippers  
Note: Domestic Intenders group is not analyzed due to the small base size (n=26)

# Overall, economic conditions and government intervention are the leading barriers to exporting.

## Barriers to Expanding / Beginning Exporting\* Total Respondents (n=1,000)



Q4. Which of the following are barriers for your company (to expand exporting / to start exporting) to other countries? Base: Total Respondents  
Note: Only mentions 5% and higher displayed

# SMBs that ship globally state 'costs' as their biggest barrier to expanding exportation to other countries...

## Barriers to Exporting Expansion – Global Shippers\*



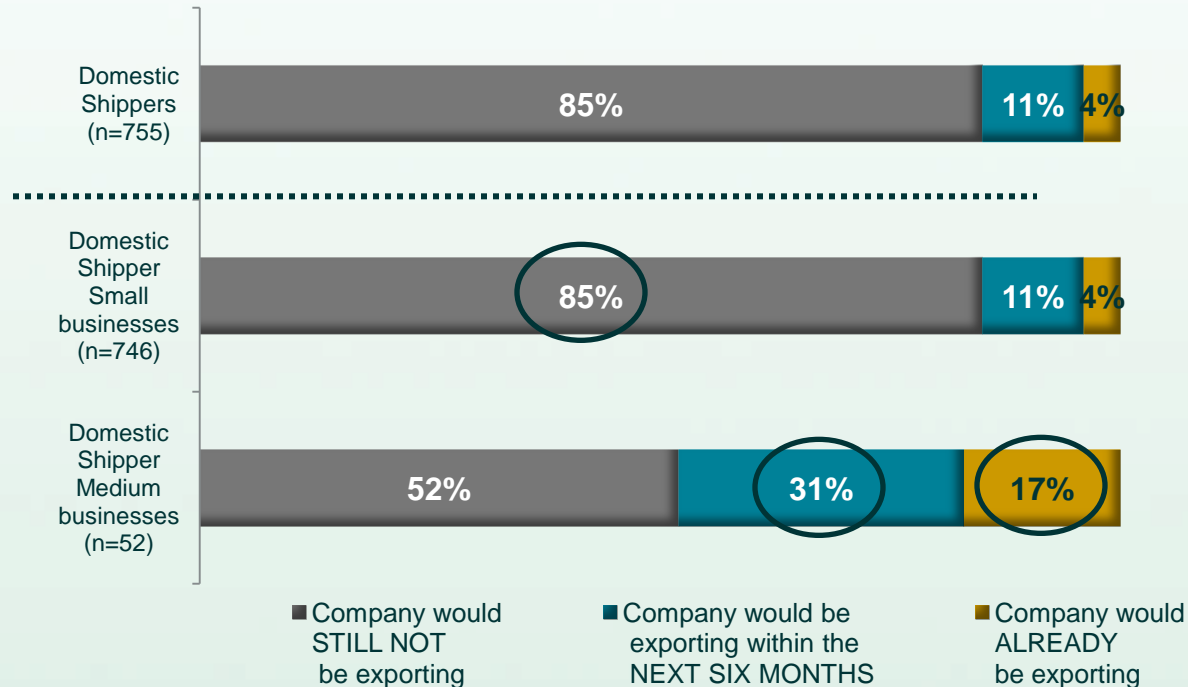
\* Notes on how to interpret word clouds in back-up section (p.40)

Q3. What is the largest barrier for your company (to expand exporting / to start exporting) to other countries (open-end)? Base: Global Shippers (n=245)

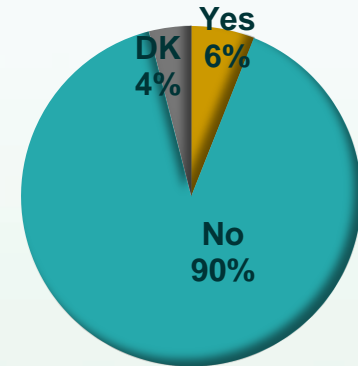


# Medium businesses are more likely to export if their main barriers were removed, and are more likely to feel competitive pressure to do so.

## Action If Main Barriers to Exporting Were Removed Domestic Shippers (n=755)



## Exporting Necessary to Stay Competitive? Domestic Shippers (n=755)

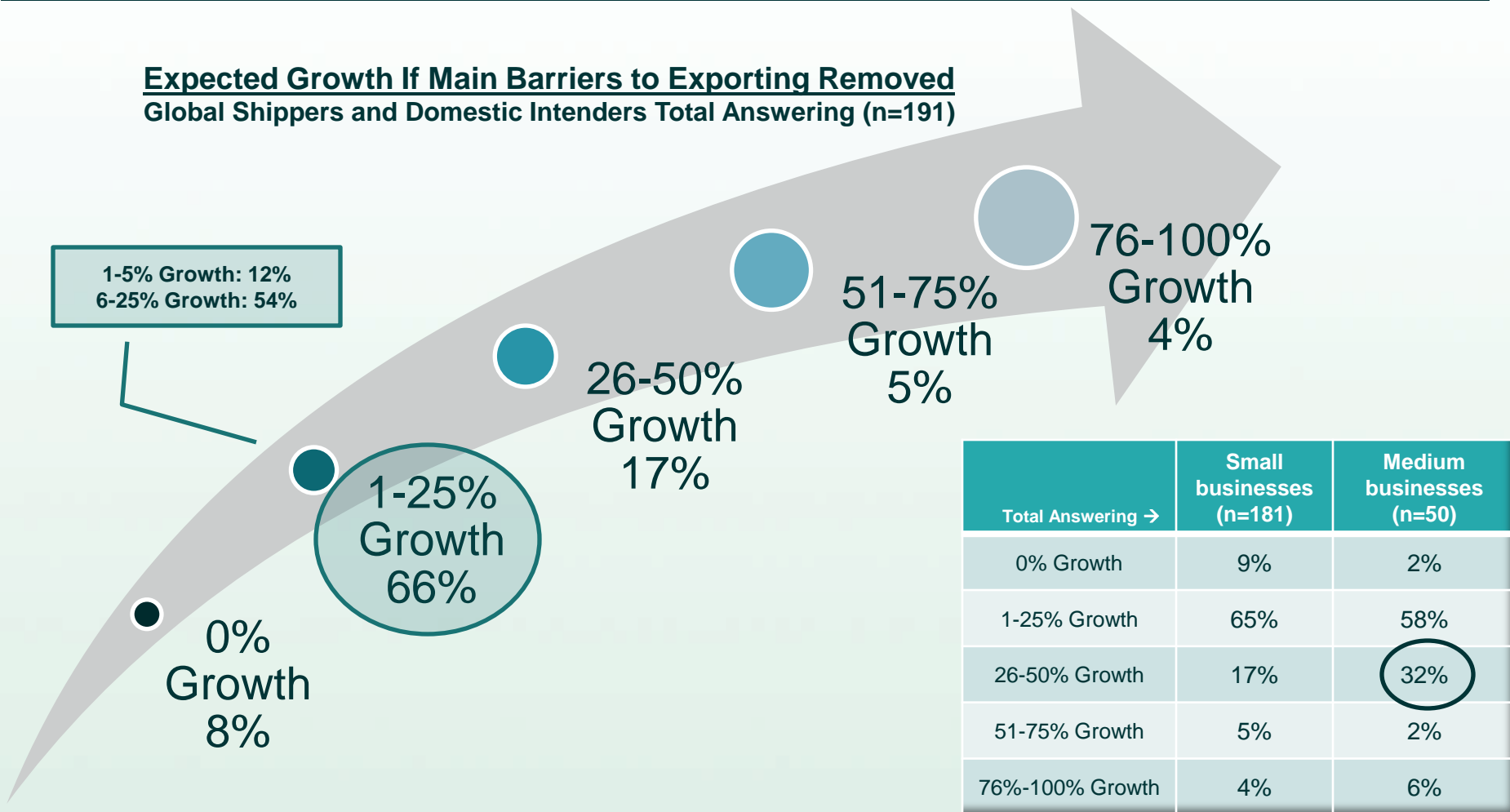


Medium businesses are more likely to feel they need to export to stay competitive (35%) (Small businesses, 6%)

Q2. Do you feel your company needs to export to other countries to stay competitive in today's marketplace? Base: Domestic Shippers  
 Q7. If the main barriers to exporting for your company were removed, you company would... Base: Domestic Shippers  
 Circles indicate significantly higher than corresponding group at the 90% confidence interval

# Most global shippers and domestic intenders expect low to modest growth (1% - 25%) with exporting barriers removed; Medium businesses expect more growth than Small businesses.

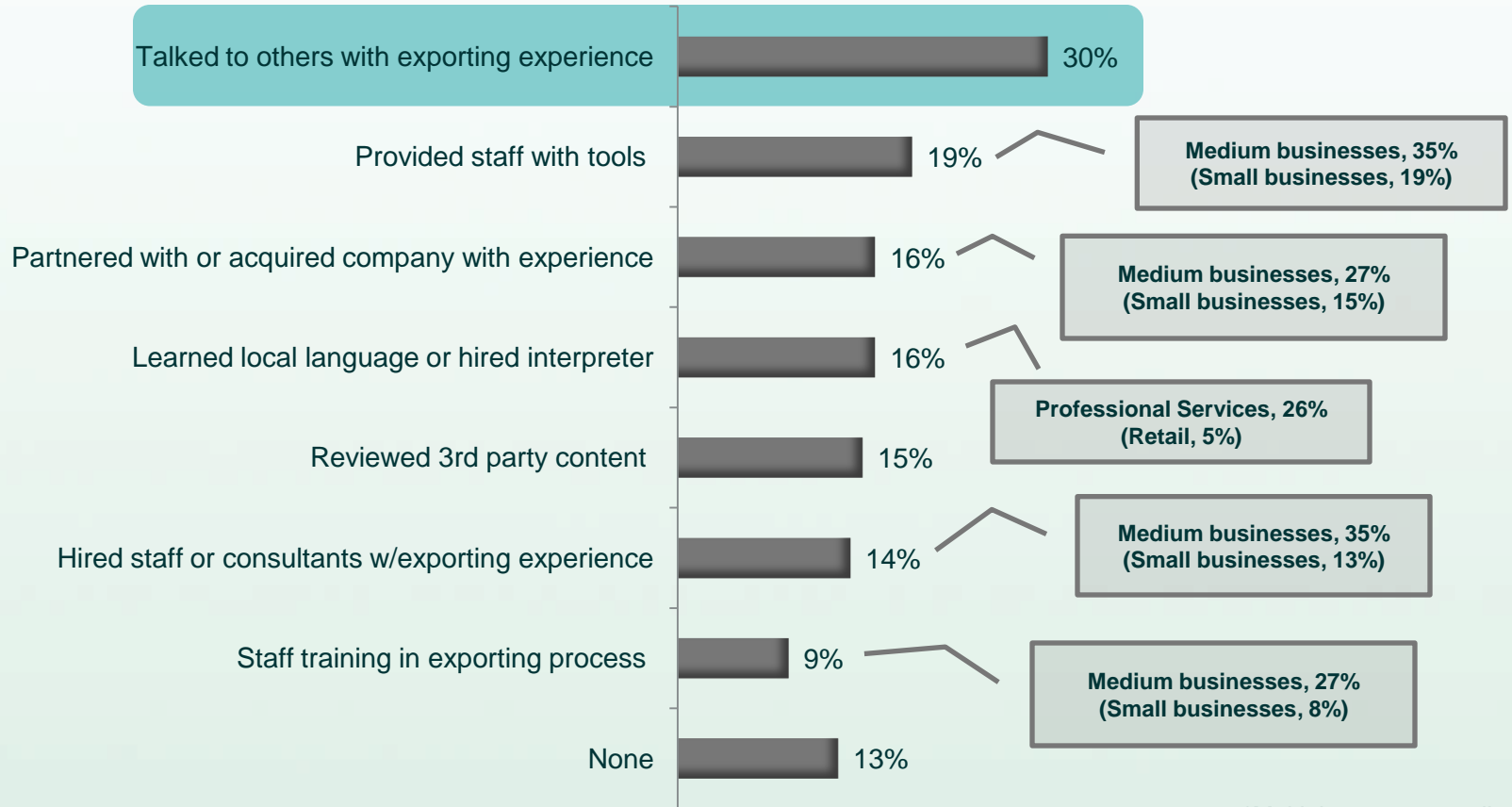
## Expected Growth If Main Barriers to Exporting Removed Global Shippers and Domestic Intenders Total Answering (n=191)



Q8. What percentage would you expect your business to grow if the main barriers to increasing exporting for your company were removed? Base: Global Shippers and Domestic Intenders – Total Answering (n=191) / Small businesses Total Answering (n=181) / Medium businesses Total Answering (n=50)  
Circles indicate significantly higher than corresponding group at the 90% confidence interval

# Current exporters employed a variety of strategies to overcome barriers; seeking advice from others with relevant experience is a key strategy.

## Strategies to Overcome Barriers to Exporting\* Global Shippers (n=245)

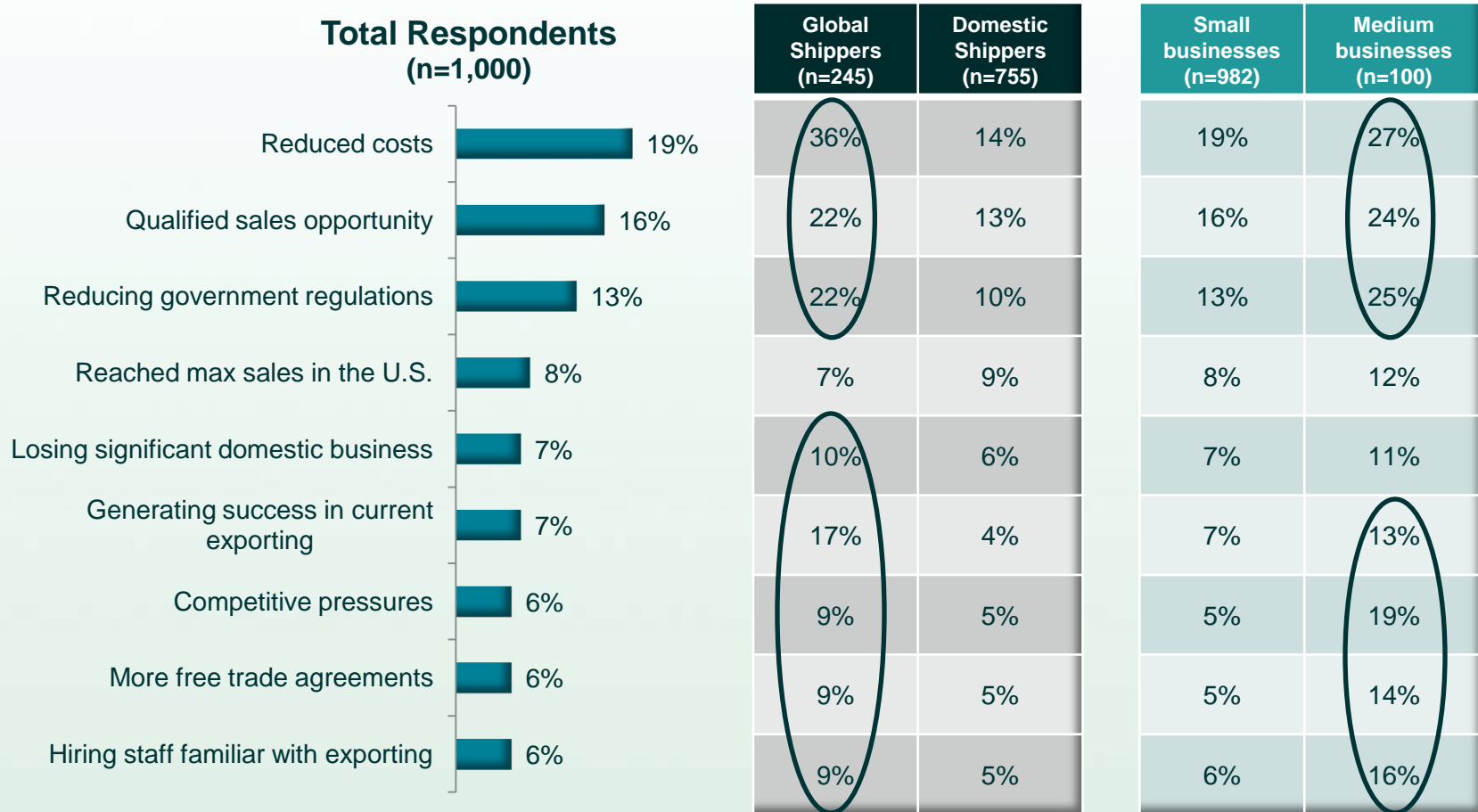


\*Multiple responses allowed

Q6. Please select from the list below, how has your company overcome barriers to exporting? Base: Global Shippers  
Note: Only mentions 4% and higher displayed

# Reducing costs, sales opportunities, and reducing government regulations are key drivers for SMBs to become more export focused, especially amongst current exporters and Medium businesses.

## What it Would Take to Become More Export Focused\*



Q9. What would it take for your company to become more export focused? Base: Total Respondents

Note: Only responses 5% and higher displayed

Circles indicate significantly higher than corresponding group at the 90% confidence interval

\*Multiple responses allowed

# Forming relationships with business partners in other countries and improved economic conditions are the most needed changes for Domestic shippers to begin exporting

## Changes Needed to Begin Exporting\*

Domestic Shippers (n=755)

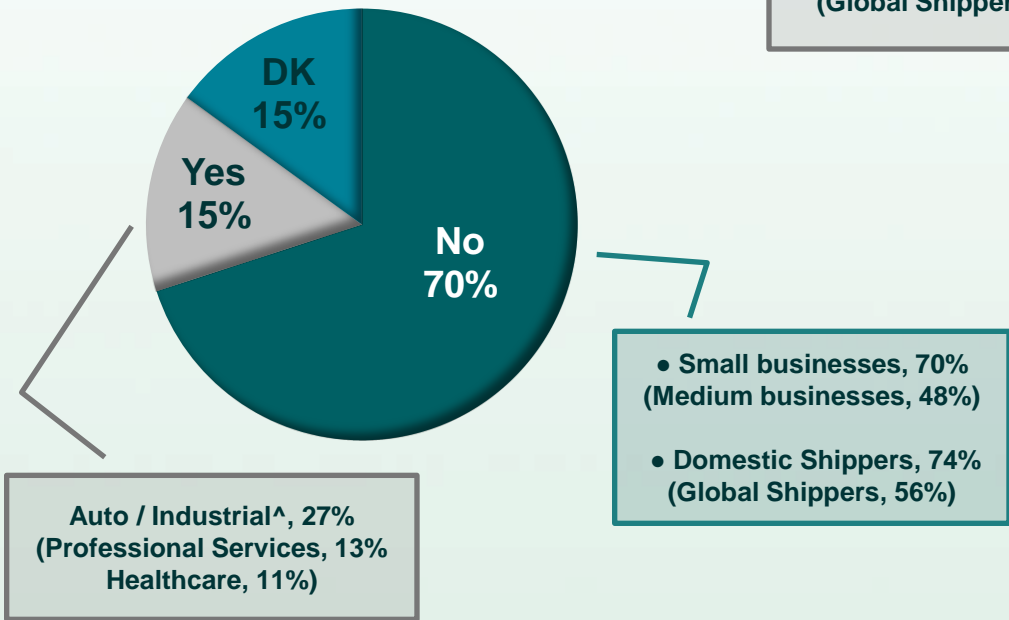


Q23. What types of internal or external changes would need to take place to sell to overseas customers? Base: Domestic Shippers

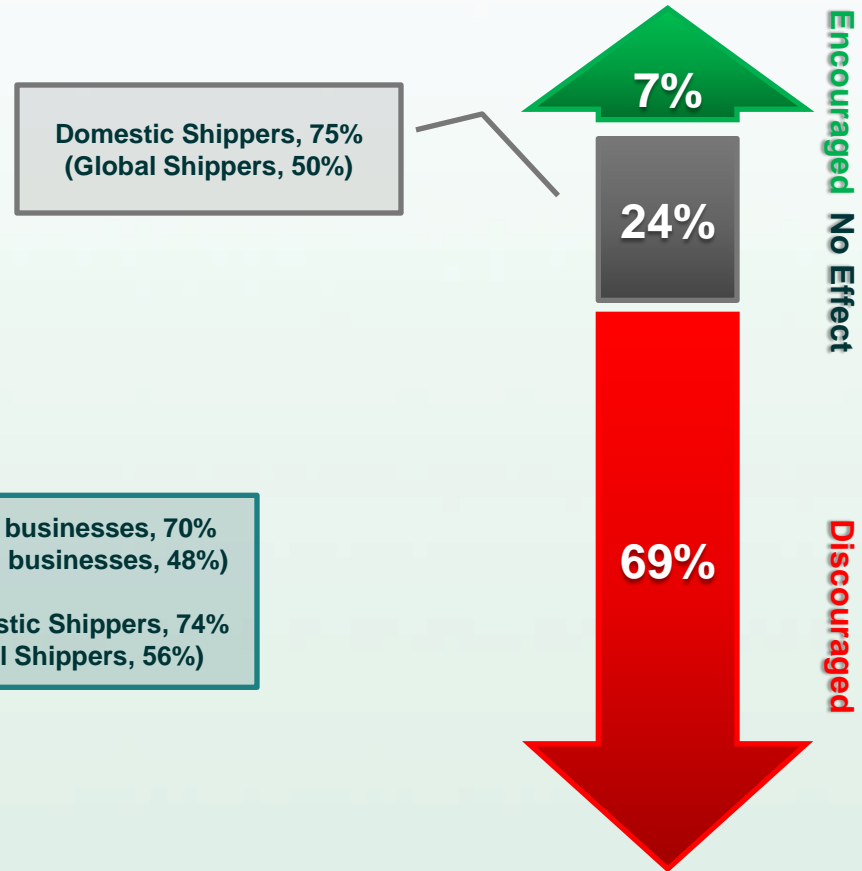
\*Multiple responses allowed

# The economy has discouraged most businesses from exporting, but SMB exporting decisions are less influenced by currency valuations.

**Currency Valuations Influence on Exporting**  
Total Respondents (n=1,000)



**Impact of Economic Downturn**  
Total Respondents (n=1,000)



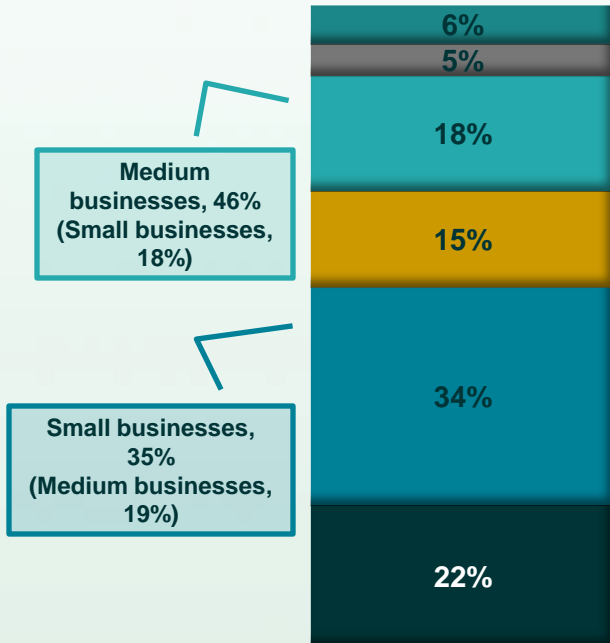
^ Caution: Small sample size

Q15. Do real or perceived manipulations of currency valuations influence your business' willingness (to increase exporting to / to begin exporting to) other countries? Base: Total Respondents

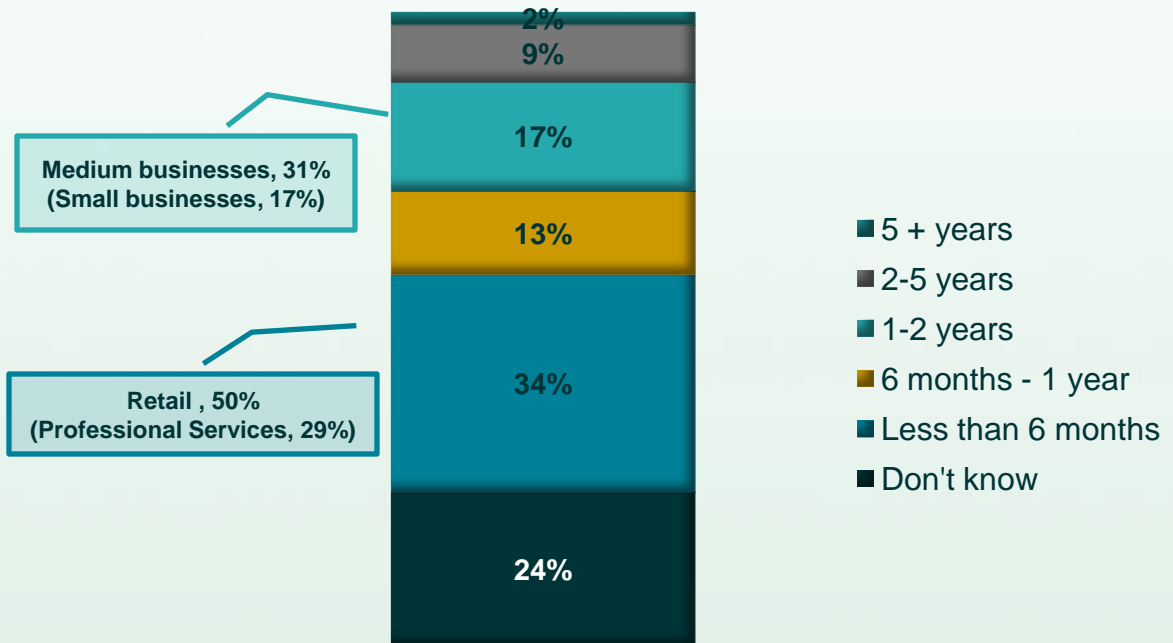
Q19. How has the economic downturn affected your decision to export goods to other countries? Base: Total Respondents

For approximately two-thirds of SMBs, the time to begin exporting and see a return is relatively short – less than two years.

**Length of Time to Sell Overseas Once  
Exporting Decision Made**  
Global Shippers (n=245)



**Length of Time for Financial  
Return After Exporting**  
Global Shippers (n=245)

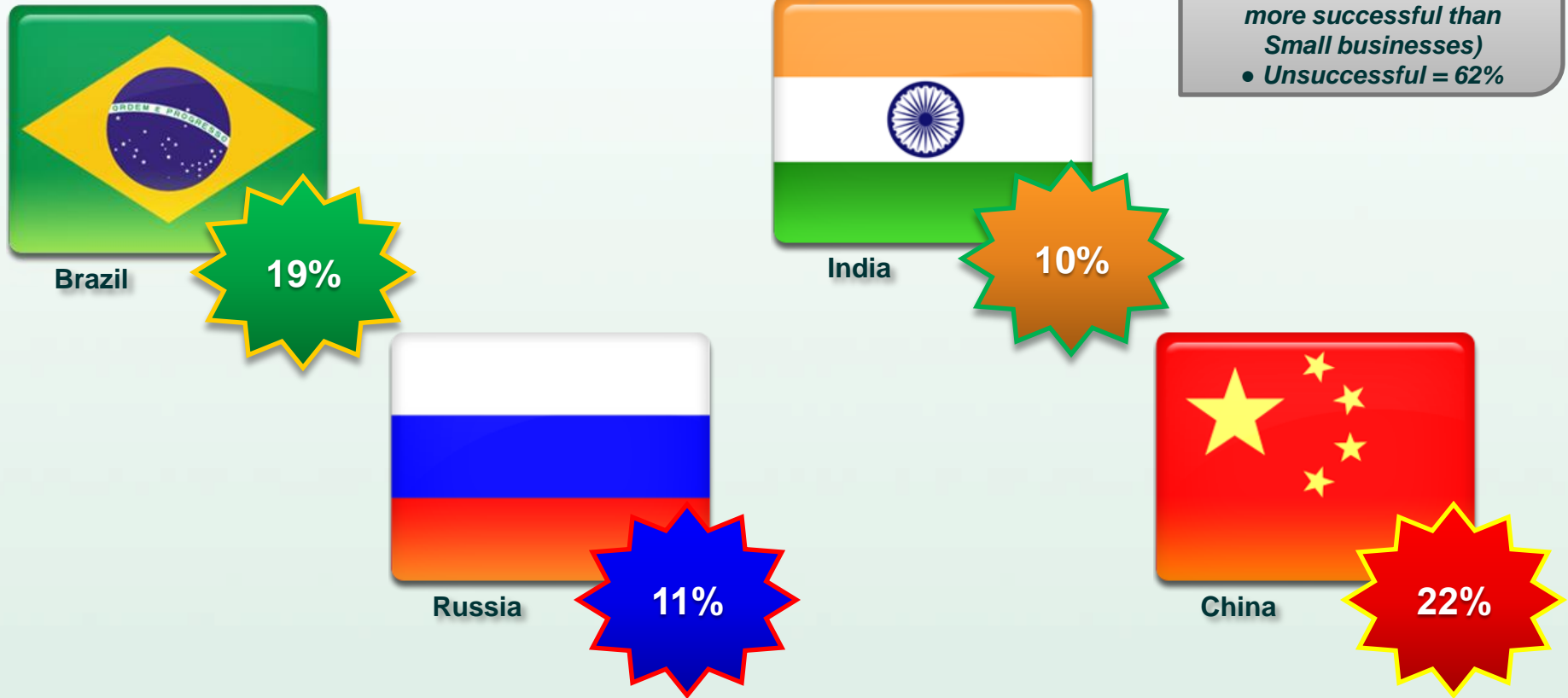


- 5 + years
- 2-5 years
- 1-2 years
- 6 months - 1 year
- Less than 6 months
- Don't know

Q29. How long did it take your company to sell overseas once you decided to begin exporting? Base: Global Shippers  
 Q30. How long did it take you to see a financial return on selling overseas? Base: Global Shippers

Nearly two-thirds of SMBs that ship globally have not had success exporting to the BRIC countries in the past ten years. SMBs have had the most success exporting to China and Brazil.

**BRIC Countries Successfully Exported to in Past 10 yrs\***  
Global Shippers (n=245)



Q13. Which of the following BRIC countries have you successfully exported to in the past 10 years? Base: Global Shippers

\*Multiple responses allowed

# Canada, China, Mexico, and the UK are both currently key markets for SMBs and the countries they intend on exporting to over the next two years.

## Top 6 Key Countries for Your Business\*

Total Respondents (n=1,000)

Canada  
23%



**Auto/Industrial<sup>^</sup>, 34%**  
**Retail, 34%**  
(Professional Services, 23%  
Healthcare 11%)

UK  
19%



**Global Shippers, 35%**  
(Domestic Shippers, 14%)  
**Retail, 30%**  
(All other Industries 15-21%)

Mexico  
13%



**Medium businesses, 21%**  
(Small businesses, 13%)  
**Auto/Industrial<sup>^</sup>, 29%**  
(All other Industries 6-14%)

China  
11%



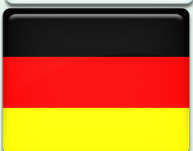
**Medium businesses, 28%**  
(Small businesses, 10%)  
**Auto/Industrial<sup>^</sup>, 17%**  
**High Tech<sup>^</sup>, 21%**

Japan  
8%



**Retail, 14%**  
**High Tech<sup>^</sup>, 13%**  
(Healthcare, 2%)

Germany  
8%



**Global Shippers, 16%**  
(Domestic Shippers, 5%)  
**Retail, 13%**  
(Other Industries, 6%)

<sup>^</sup> Caution: Small sample size \*Multiple responses allowed

## Top 5 Countries Intend to

### Export to next 2 years\*

Global Shippers & Domestic Intenders (n=271)

UK  
24%



**Retail, 39%**  
(Other Industries, 18%)

Canada  
20%



**Small businesses, 21%**  
(Medium businesses, 11%)

China  
13%



**Medium businesses, 37%**  
(Small businesses, 11%)

Mexico  
10%



**Medium businesses, 16%**  
(Small business, 9%)

Australia  
9%



**Retail, 18%**  
(Professional Services, 6%)

Q11. Please list up to three countries you see as the key international markets for your business? Base: Total Respondents

Q12. Please list up to three countries you intend to (increase exporting to / begin exporting to) within the next two years? Base: Global Shippers and Domestic Intenders

Despite their exposure over the last ten years, BRIC countries are still perceived as emerging markets. Mexico makes it into the top 5, but the UK, Japan, Argentina, and France exceed the other MIST countries.

**New Emerging Markets for Exports\***  
Global Shippers (n=245)



China



Brazil



India



Russia



Mexico



UK



Japan



Argentina



France



Brazil

**BRIC**

17%



Russia

9%



India

16%



China

24%



Mexico

**MIST**

7%



Indonesia

1%



South Korea

2%



Turkey

1%

- Top 5 countries among Domestic: China (14%), Canada (7%), Brazil (6%), India (6%), and Mexico (6%) – 60% DK
- The top Continent mentioned in total – Asia
- Global Shippers named Asia, Europe, and South America more than Domestic Shippers who mentioned more North American countries

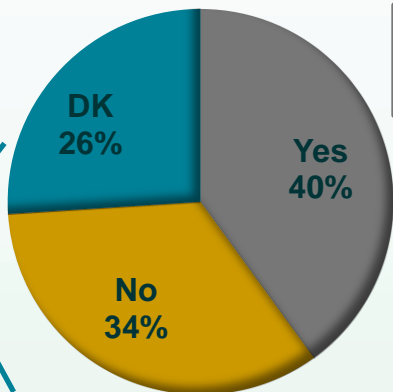
Q14. Please list up to three countries you see as the next new emerging markets to export to? Base: Global Shippers

\*Multiple responses allowed

# Asked directly, SMBs are split on whether the government should assist with trade, yet changes in government policy are among the top strategies SMBs believe will help them increase exports.

## Should Gov't Help Trade

Total Respondents (n=1,000)



Global Shippers, 48%  
(Domestic Shippers, 37%)

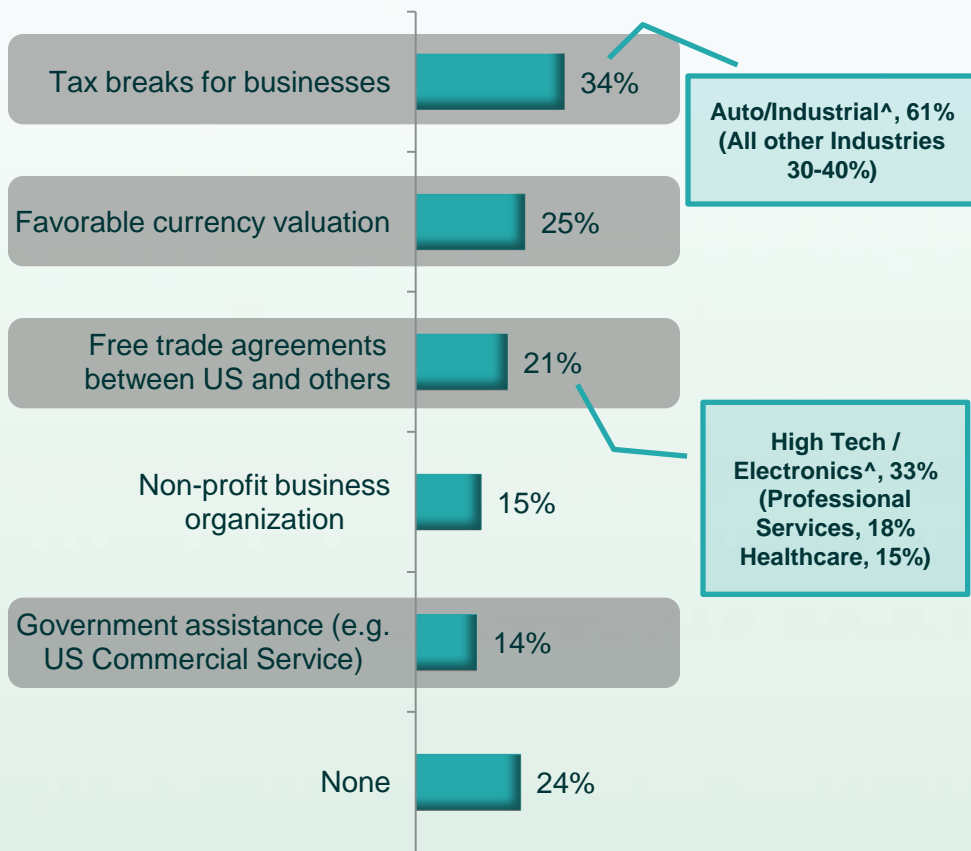
Small businesses, 26%  
(Medium businesses, 18%)

### Government Policy (net) – 56%

- Global Shippers, 75%  
(Domestic Shippers, 49%)
- Auto / Industrial<sup>^</sup>, 76%  
Retail, 67%  
(Professional Services, 54%  
Healthcare, 47%)

## Changes to Help Increase Exports\*

Total Respondents (n=1,000)



Auto/Industrial<sup>^</sup>, 61%  
(All other Industries 30-40%)

High Tech /  
Electronics<sup>^</sup>, 33%  
(Professional Services, 18%  
Healthcare, 15%)

Q25. Do you believe the government should be involved in helping companies facilitate trade? Base: Total Respondents

Q26. Which of the following would help you increase your exports? Base: Total Respondents

<sup>^</sup> Caution: Small sample size

\*Multiple responses allowed

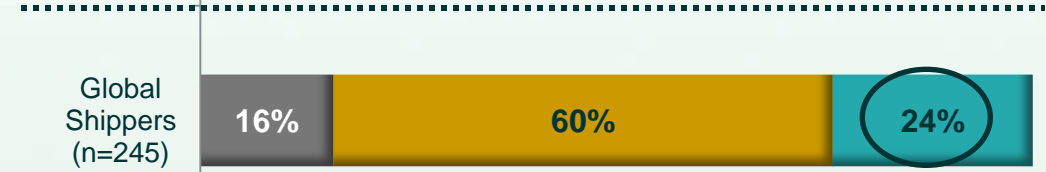
# Most SMBs do not feel affected by Free Trade Agreements; more global shippers perceive a benefit.

## Perception of Free Trade Agreements

Total Respondents (n=1,000)



**The Healthcare Industry feels the least affected by Free Trade Agreements, 83%**  
(Retail, 66% ; Auto / Industrial<sup>^</sup>, 56%)



14% Has already helped my business  
(Domestic Shippers, 3%)



■ Hurt / Potentially Hurt my Business    ■ No Affect on my Business    ■ Helped / Potentially Help my Business

Q24. Please indicate your view on how free trade agreements between the U.S. and other countries have affected or not affected your business. Free trade agreements have...  
Base: Total Respondents  
Circles indicate significantly higher than corresponding group at the 90% confidence interval      <sup>^</sup> Caution: Small sample size

The majority of global shippers warehouse all products within the U.S. and are unwilling to change. Medium businesses are more open to off-shore storage.

Just 10% of Global Shippers currently warehouse products offshore



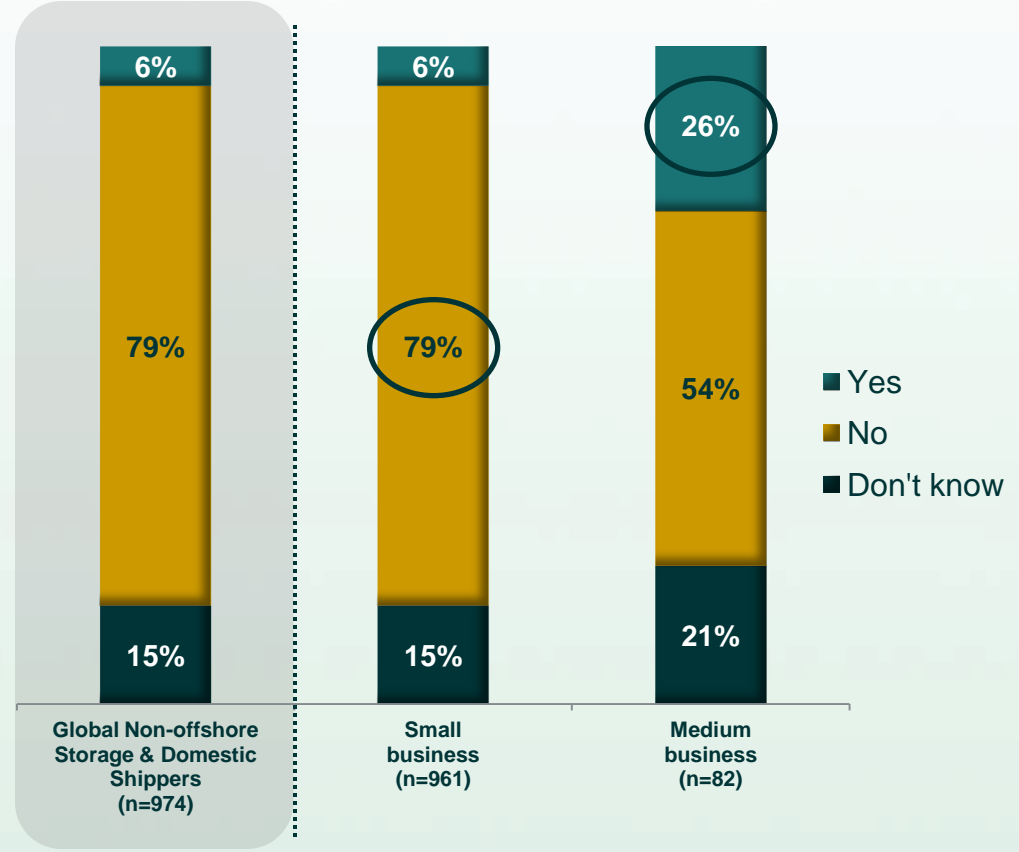
**Biggest Benefits to Off-shore Storage**  
Global Shippers who store products offshore (n=24\*)

TOP MENTIONS

Incentives from other countries to store goods

Enables quicker delivery of goods to global customers

**Willingness to Store Products Offshore<sup>^</sup>**  
Global Non-offshore Storage Shippers & Domestic Shippers



\* Caution: Small sample size, multiple responses allowed

<sup>^</sup>Circles indicate significantly higher than corresponding group at the 90% confidence interval

Q20. Do you currently warehouse any / all of your products offshore? Base: Global Shippers (n=245)

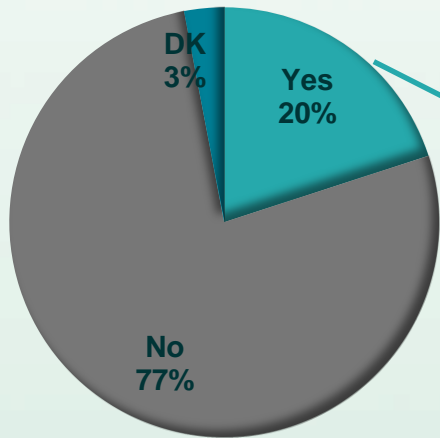
Q21. What are the biggest benefits to your company storing products at offshore locations? Base: Global Shippers who store products offs

Q22. Would you be willing to store your company's products offshore? Base: Global Non-offshore Storage Shippers & Domestic Shippers

# Medium businesses and global shippers are more apt to make purchases overseas

The Auto / Industrial<sup>^</sup>, High Tech Electronics<sup>^</sup>, and Retail Industries are more likely to make purchases from other countries

**Overseas Purchases**  
Total Respondents (n=1,000)



Domestic Shippers who purchase overseas

- Medium businesses, 40% (Small business, 20%)
- Global Shippers, 38% (Domestic Shippers, 14%)

**Reasons to Purchase Overseas but not Export\***  
Domestic Shippers who Purchase Overseas (n=106)



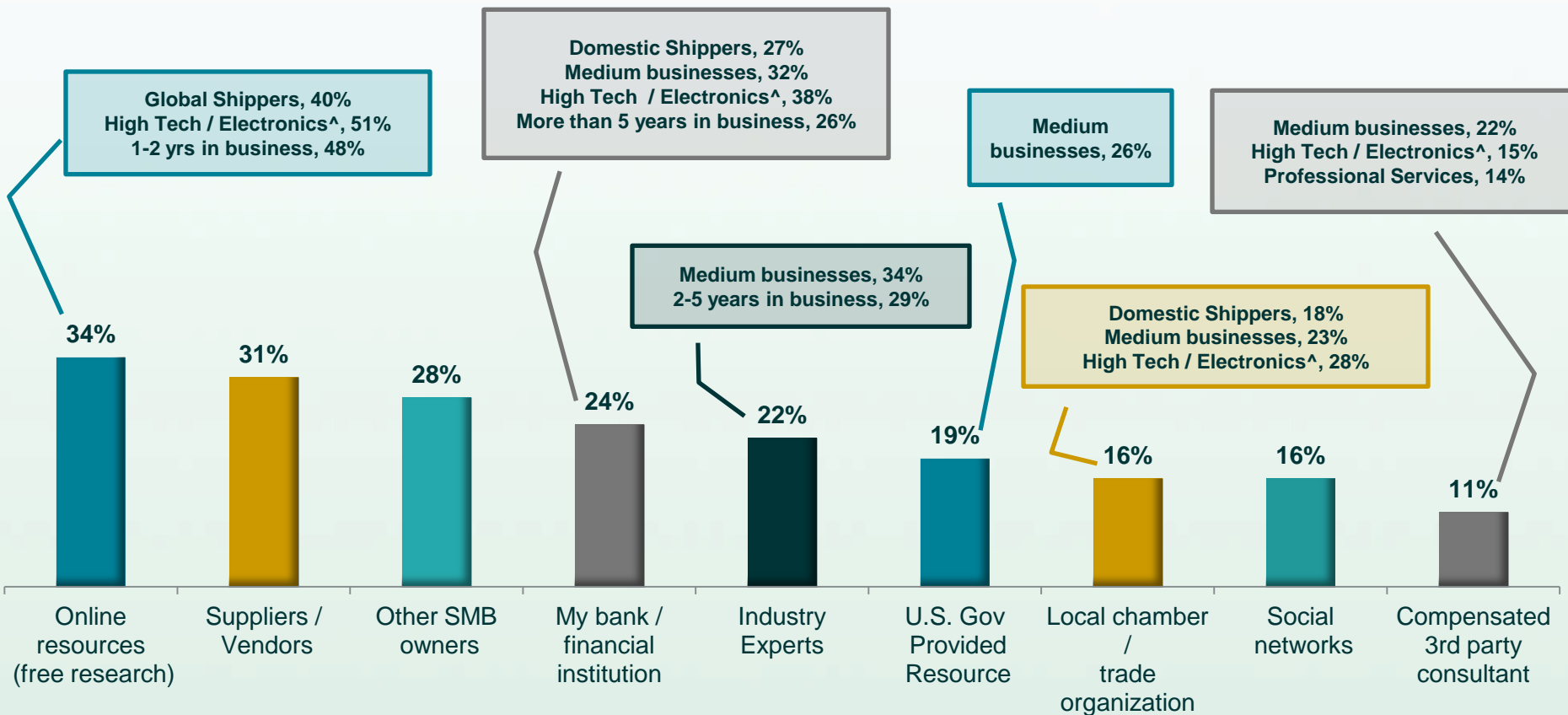
<sup>^</sup> Caution: Small sample size  
\*Multiple responses allowed

Q27. Does your company make purchases from businesses based in other countries? Base: Total Respondents  
Q28. Why is your company comfortable with importing from other countries but not exporting?  
Base: Domestic Shippers who purchase from other countries Note: Only mentions 5% and higher displayed

# One third of SMBs use free online research and supplier/vendor advice to support operational decisions

## Resources for Supporting Operational Decisions Total Respondents (n=1,000)

Do not use any resources 33%  
Domestic Shippers, 36%



Q10. Which of the following resources, if any, do you (currently rely on / know of) for supporting operational decisions your company makes?

\*Multiple responses allowed

Base: Total Respondents

^ Caution: Small sample size

Note: Call-outs are for significance over corresponding group(s)

# Old-fashioned word-of-mouth is the top resource for finding a successful exporting lead, followed by the SMBs' company Website.

## Channels that Provide Exporting Leads\* Total Respondents (n=1,000)

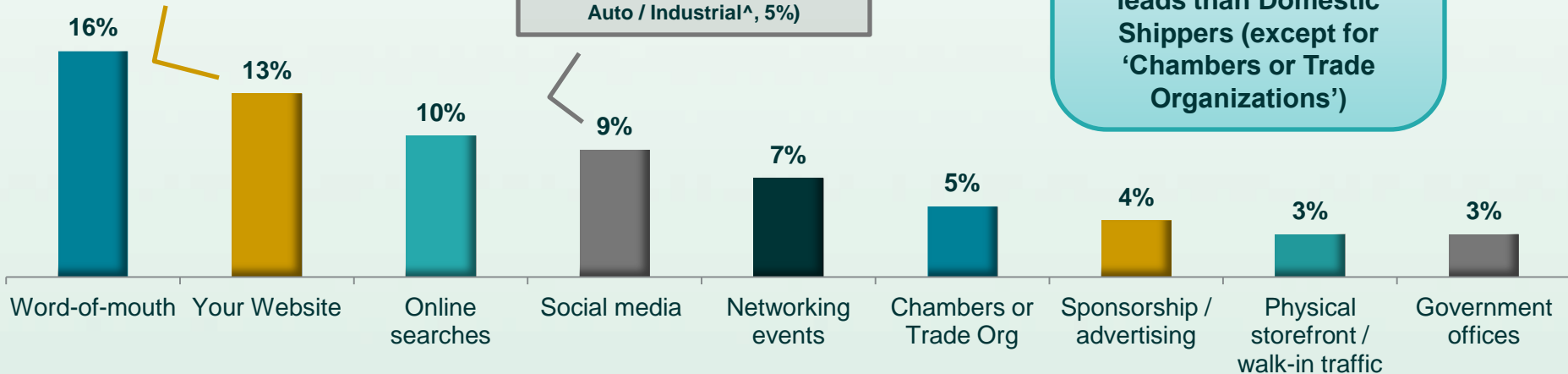
None 67%  
Domestic Shippers, 80%  
(Global Shippers, 27%)

Besides 'Word-of-mouth',  
Medium business are more  
likely to have leads from all of  
these channels

Retail, 29%  
(Professional Services, 10%  
Healthcare, 9%  
Auto / Industrial^, 7%)

High Tech / Electronics^, 21%  
(Professional Services, 10%  
Auto / Industrial^, 5%)

Global Shippers are  
using all of the following  
channels more  
frequently to find  
successful exporting  
leads than Domestic  
Shippers (except for  
'Chambers or Trade  
Organizations')



Q31. In the last 12 months, please indicate if any of the following channels have provided a successful exporting lead?  
Base: Total Respondents

\* Caution: Small sample size  
\*Multiple responses allowed

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# Executive Summary

## Current Global Trade Activity and Perceptions

- Three quarters of SMBs have yet to engage in global trade, representing an untapped market for shippers and other companies involved in exporting.
  - ✓ More Medium than Small businesses are involved in global trade
- A variety of barriers to exporting or expanding global trade exist:
  - ✓ Overall, economic conditions and government policies are the primary barriers to exporting.
  - ✓ Many domestic-only shippers – especially Small businesses – have not yet recognized the need to export. Accordingly, Small businesses do not feel competitive pressure to begin exporting, as many Medium businesses do.
  - ✓ Companies already involved in global trade cite cost as the key barrier to expansion

## The Future of Global Trade

- If the main perceived barriers among current domestic-only shippers were removed, it would have a significant impact for Medium businesses – nearly half would already be exporting or doing so within the next six months.
  - ✓ For Small businesses, removing barriers will have little impact – 85% say they still would not be exporting.

# Executive Summary (Continued)

## The Future of Global Trade (Continued)

- Overall, SMBs expect that removing their main exporting barriers will have only a small impact on the growth of their business – just over half expect about 6%-25% growth.
  - ✓ Medium businesses are more optimistic on their growth prospects, with nearly one-third expecting growth of 26%-50%, while only 17% of Small businesses expect this growth rate.
- Reducing costs, identifying sales opportunities and reducing regulation are most important for companies to be more export focused.
  - ✓ Also, SMBs not currently involved in global trade believe partnerships with companies in other countries are needed to sell to overseas customers.

## Experience of Current Exporters

- Current global exporters have employed a range of strategies to overcome barriers; simply talking to others with experience in this area is the most widely used approach.
- For approximately two-thirds of SMBs currently exporting, the time from decision to actually exporting and seeing a return is less than two years.

# Executive Summary (Continued)

## Export Target Countries

- U.S. North American neighbors – Canada and Mexico – are among the top international markets for U.S. firms, now and in the near future.
- The U.K. has been and will continue to be a top export market; China is the only BRIC nation among the top international markets for U.S. SMBs.
  - ✓ 22% of U.S. exporting SMBs have successfully exported to China in the past 10 years; 19% have done so to Brazil.
  - ✓ Going forward, Australia appears to be increasing in importance in the near term, with Brazil and India emerging as well.

# Executive Summary (Continued)

## Governmental Intervention in Global Trade

- Not unlike the political divide in the U.S. on the role of government in general, SMBs are split over whether government should help facilitate trade – 40% say “yes”, 60% indicate “no” or “don’t know”.
- The perception of the impact of Free Trade Agreements is generally neutral; that is, most SMBs do not believe these agreements have affected their businesses. Importantly, however, a quarter of current exporters believe they have helped their business.

## Resources

- SMBs today utilize a wide variety of resources to help run their businesses
  - ✓ Online resources (free information), suppliers/vendors and other SMB owners are the top resources for operational decision-making.
  - ✓ For identifying exporting leads, word-of mouth and SMBs’ own websites are the leading tools.

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# Implications

- Global trade development should focus on Medium businesses. Most Small businesses do not appear ready to engage in exporting.
- In general, Medium businesses should respond positively to removed or reduced barriers to global trade
- Government policy is key to global trade development:
  - ✓ Businesses would be encouraged by reduced regulations
  - ✓ Free Trade Agreements should continue to be considered by governments as a way to encourage global trade, as they have had a positive business impact for some SMBs.
- Priority strategies to help SMBs start or expand their global trade activities include:
  - ✓ Helping current exporters better manage their exporting costs to encourage expansion
  - ✓ Assisting SMBs with identifying sales opportunities
  - ✓ Helping SMBs identify suitable global partners
- The target country landscape is unclear, with both developed and emerging countries representing future opportunities. The top export markets appear to be Canada, Mexico, U.K., Australia, China, India and Brazil.
- Significant investment in developing global trade should be made after global economic conditions improve. It is likely that most companies will wait until they believe the economy is improving before starting or expanding their exporting activity.

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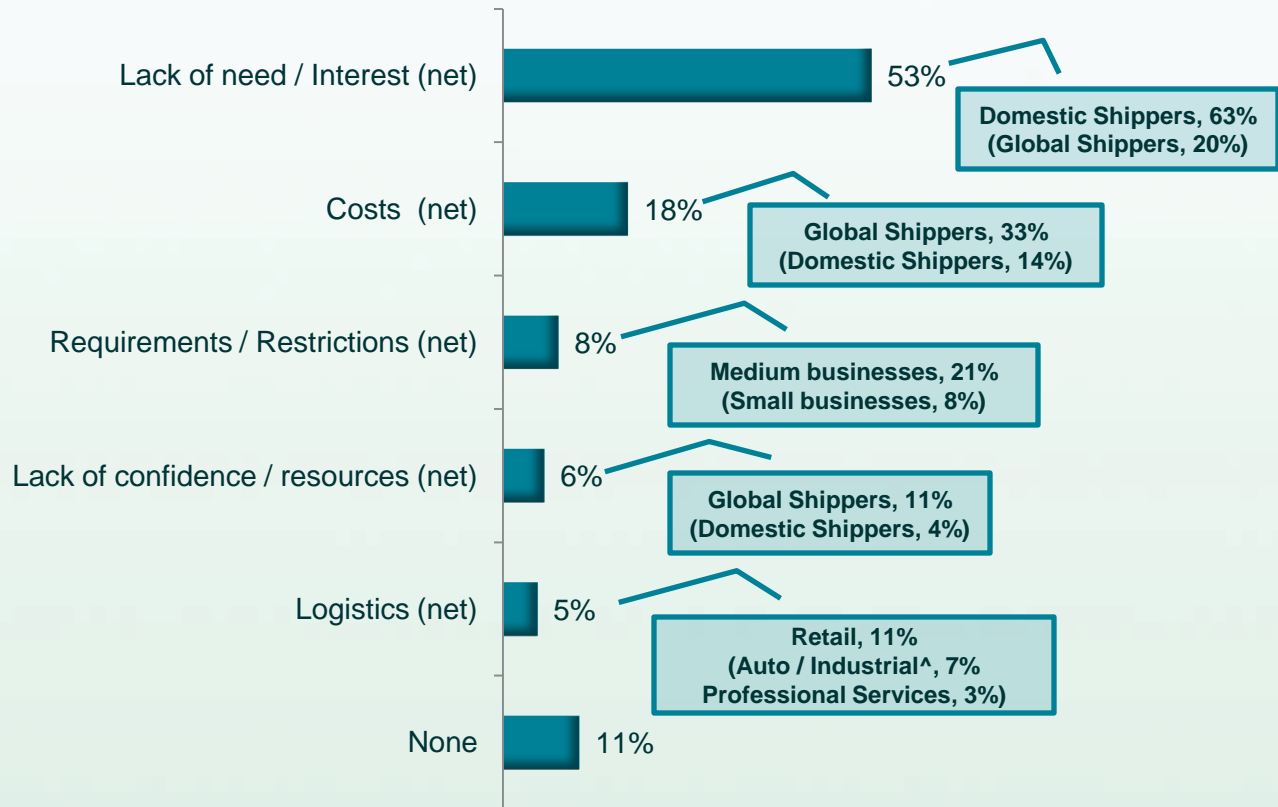
Backup

# How to interpret word clouds

- Word clouds are generated from respondent's verbatim answers to open-ended questions
- The bigger the word within the cloud, the higher frequency of mention
  - Color, direction, and position have no relevance (only for aesthetics)
- Word clouds located on slides: 11, 12, & 25
- Source: [wordle.net](http://wordle.net)

# Domestic shippers and Small businesses have not yet recognized the need to export, while cost issues prevent current exporter expansion.

## Barriers to Expanding / Beginning Exporting – In their own words Total Respondents (n=1,000)

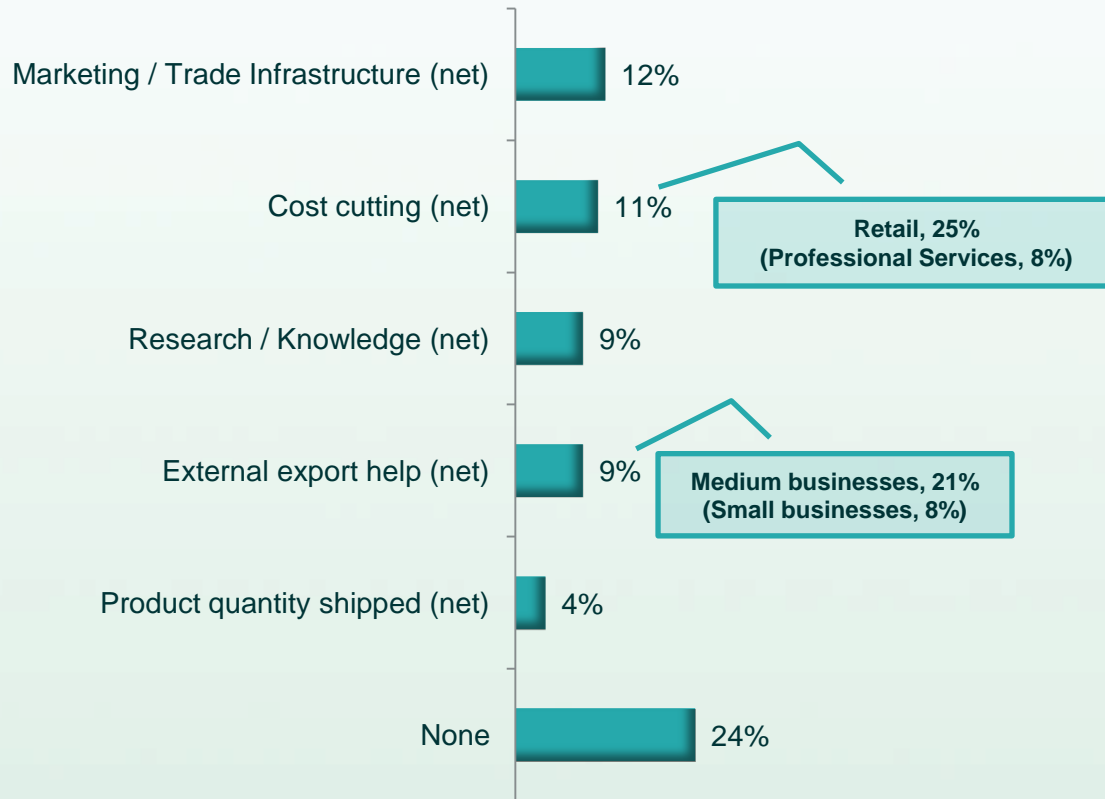


<sup>^</sup> Caution: Small sample size

Q3. What is the largest barrier for your company (to expand exporting / to start exporting) to other countries (open-end)? Base: Total Respondents  
Note: Only mentions 5% and higher displayed

# Infrastructure and cost cutting (especially amongst the Retail Industry) are top strategies for overcoming global exportation barriers.

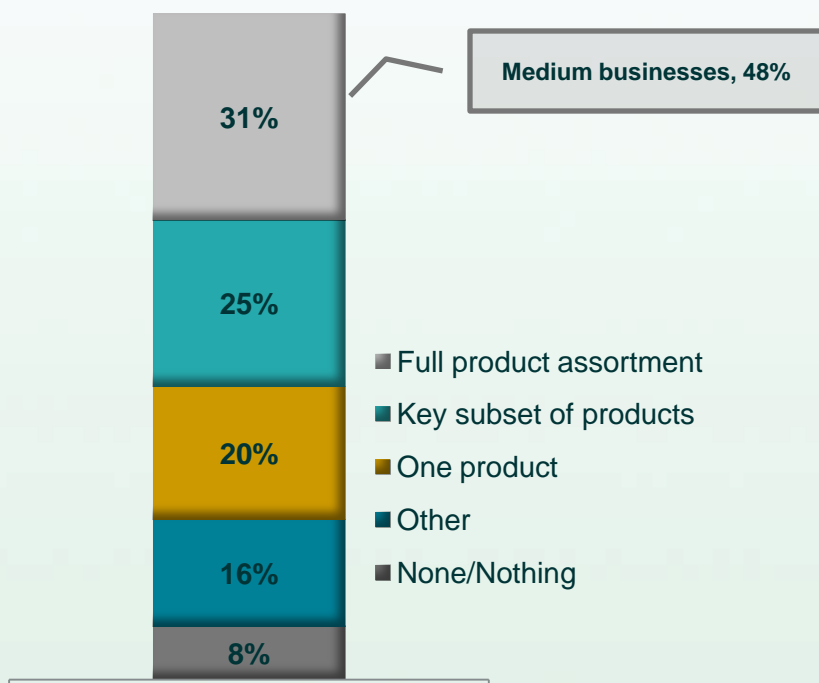
## Strategies to Overcome Barriers to Exporting – In their own words Global Shippers (n=245)



Q5. What's the best strategy your company has used to overcome exporting barriers (open-end)? Base: Global Shippers  
Note: Only mentions 4% and higher displayed

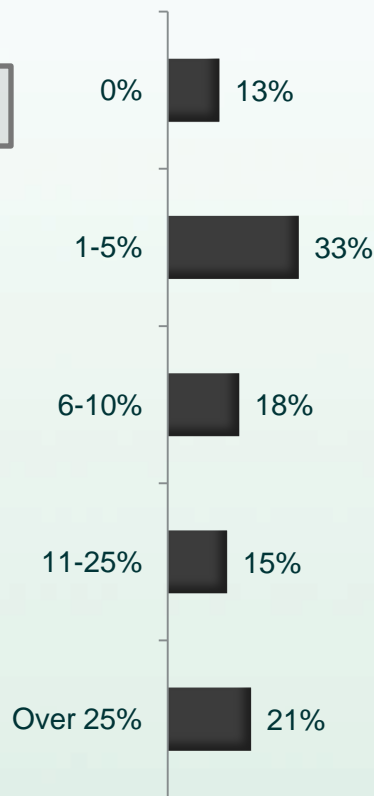
# Medium businesses are more likely to export a full product assortment and have more percentage revenue coming from exporting

**What your Company Exports**  
Global Shippers (n=245)



**Total Annual Revenue – from Exporting**

**Global Shippers (n=245)**



	Small businesses (n=236)	Medium businesses (n=48)
0%	13%	4%
1-5%	34%	15%
6-10%	17%	17%
11-25%	16%	24%
Over 25%	20%	40%

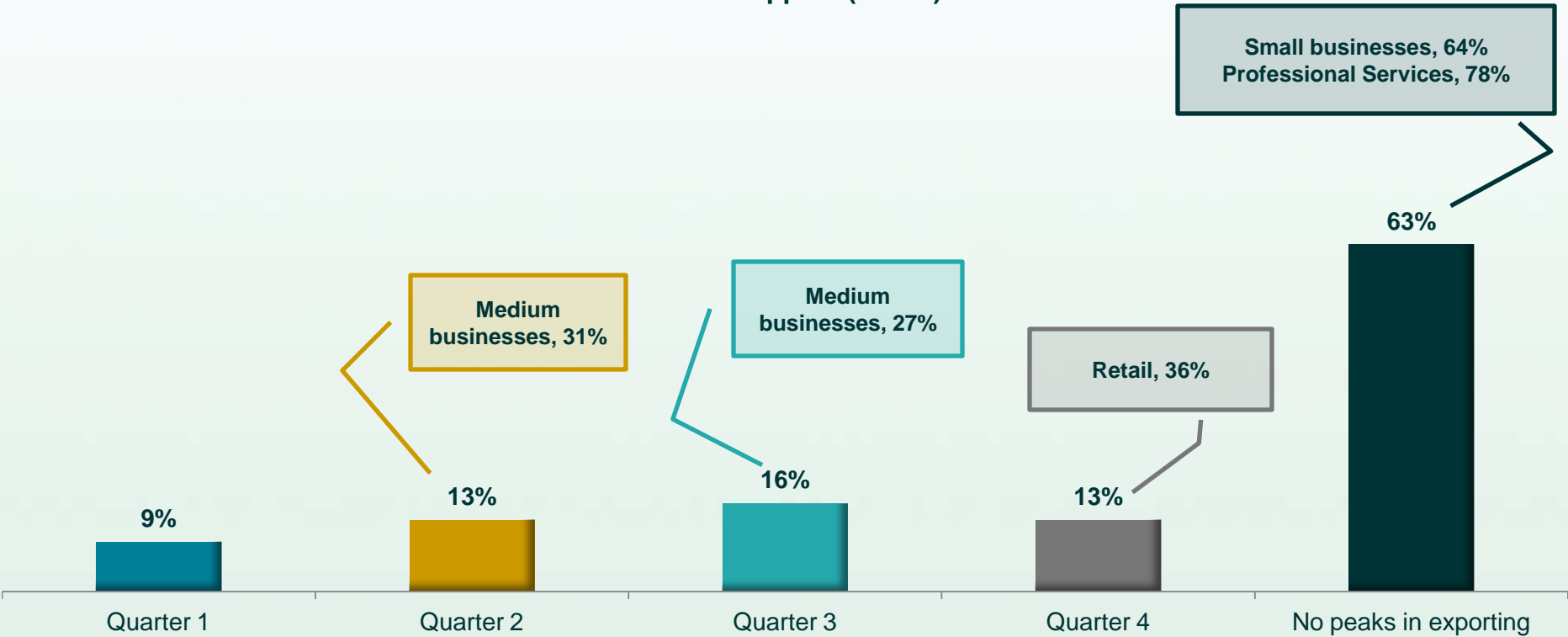
D1. Of all the goods that your company produces, what does your company export? Base: Global Shippers

D2. How much of your total annual revenue comes from exporting? Base: Global Shippers

Circles indicate significantly higher than corresponding group at the 90% confidence interval / Note: Call-outs are for significance over corresponding group(s)

**Small and Professional Service companies are less likely to experience peaks in exporting. The majority of the peaks experienced in Q4 are from Retail companies.**

**Peaks in Exporting\***  
Global Shippers (n=245)

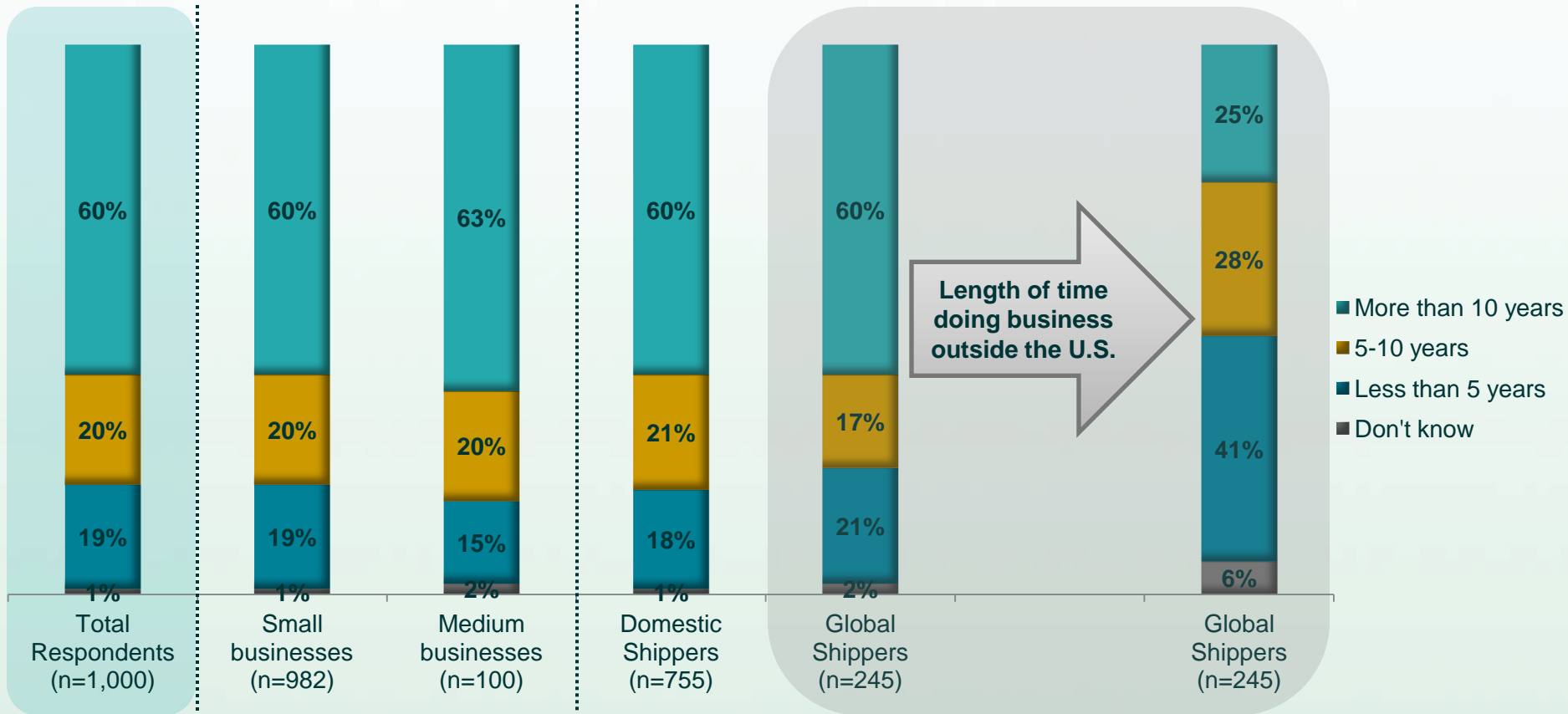


D3. Please select the timeframe that your company sees a peak in exporting? Base: Global Shippers  
Note: Call-outs are for significance over corresponding group(s)

\*Multiple responses allowed

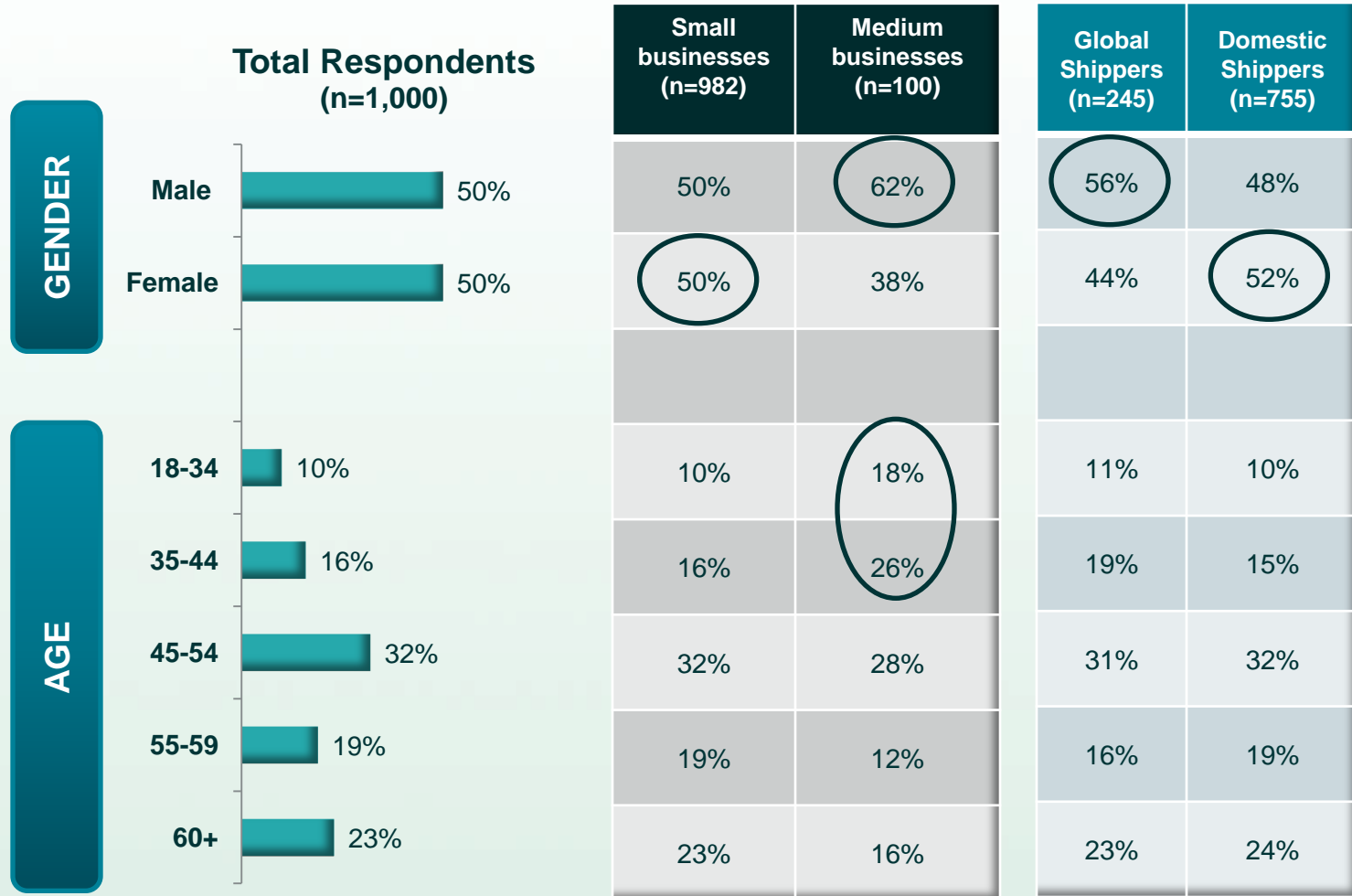
# The majority of domestic and global companies have been in business more than 10 years

## Length of Time in Business



D4. How long has your company been in business? Base: Total Respondents  
 D5. How long have you been doing business outside of the U.S.? Base: Global Shippers  
 Circles indicate significantly higher than corresponding group at the 90% confidence interval

# Medium businesses are represented more by younger males



D6. What is your gender? Base: Total Respondents

D7. Which of the following ranges best describes your age? Base: Total Respondents

Circles indicate significantly higher than corresponding group at the 90% confidence interval

# Small businesses are more likely to have been represented by Owners/ Partners/ Founders and make shipping/logistics decisions alone, compared to Medium businesses.

## Job Title

Total Respondents  
(n=1,000)

	Small businesses (n=982)	Medium businesses (n=100)
Owner /Partner /Founder	78%	24%
CEO/CFO/COO	6%	19%
SVP / President / VP	4%	10%
Department Head / Director / Executive	6%	29%
General Manager / Controller	7%	18%

Owner /Partner /Founder 77%

CEO/CFO/COO 6%

SVP / President / VP 4%

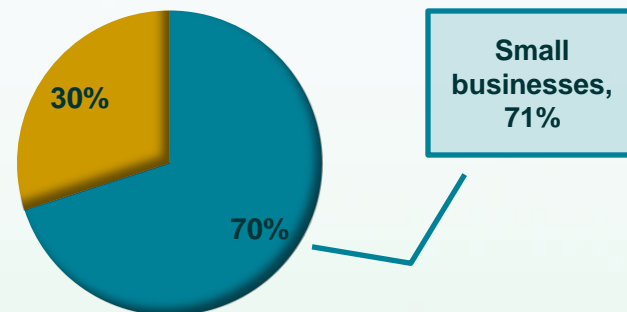
Department Head / Director / Executive 6%

General Manager / Controller 7%

Global Shippers, 9%

## Role in Shipping & Logistics

Total Respondents (n=1,000)



- Make shipping/logistics decisions ALONE
- SHARE shipping/logistics decisions

S3. What is your job title? Base: Total Respondents

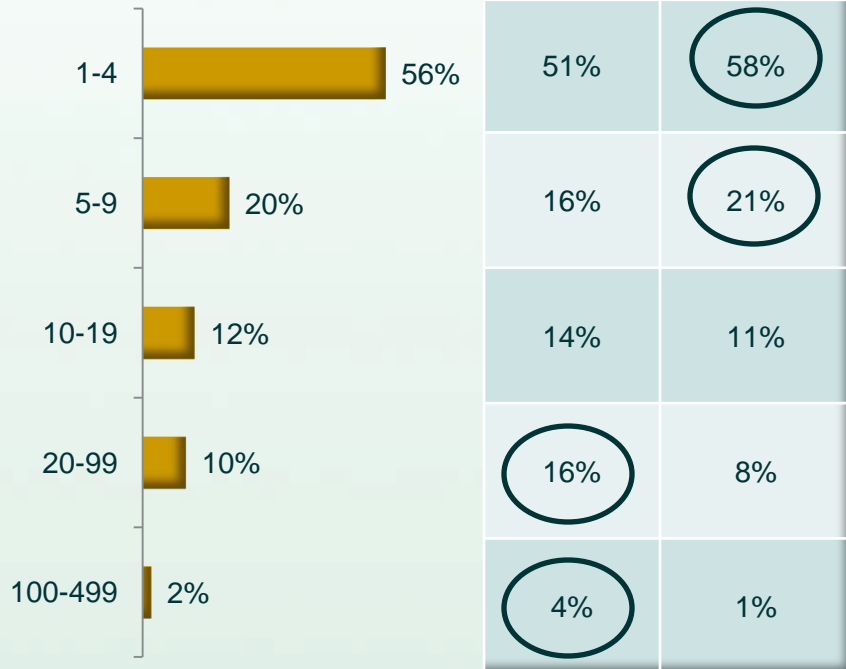
S4. Which of the following best describes your role in shipping and logistics decisions made by your company? Base: Total Respondents

Note: Call-outs are for significance over corresponding group(s)

# Global and Auto/Industrial/Manufacturing companies are more likely to have 20+ employees

## Number of Employees

### Total Respondents (n=1,000)



Auto / Industrial / Manufacturing (n=41^)	Health-care (n=53)	High tech / Electronics (n=39^)	Professional Services (n=295)	Retail (n=126)	Other (n=465)
A	B	C	D	E	F
17%	45% A	44% A	67% ABCF	62% ABC	54% A
22%	23%	23%	17%	17%	21%
27% DEF	21% D	13%	9%	13%	12%
22% BDE	8%	10%	7%	7%	12% D
12% EF	3%	10% EF	0%	1%	1%

^ Caution: Small sample size

S5. Approximately how many full and part-time employees work for your company in total at all locations including yourself? Base: Total Respondents

S6. Which, if any, of the following are considered your company's primary industry? Base: Total Respondents