the 411
All things you need to know about today’s chauffeured and motorcoach industries.

Survey Details
Your Operations

Latest Vendor Lists

Word To You:
New Terms Of The Limo Trade

2015-2016 FACT BOOK & INDUSTRY GUIDE

1. FirstGroup America, Inc.
2. Royal Hyway Group
3. 360 Fleet Services LLC
4. Academy
5. Pacific Western Group
6. Royal Hyway Group
7. Royal Hyway, Inc.
8. Peter Pan Bus Lines Inc.
9. Mears Motor Coach
10. Martz

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LCT/NLA SHOW EAST
NOV. 8-10, 2015
SEE PAGE 62 FOR DETAILS
Industry Maintains MOMENTUM

After a comeback year, most signs are holding steady or looking slightly up despite the onslaught from transportation network companies.

By Martin Romjue and Tom Halligan, LCT editors
Survey compiled and produced by Rachel Miller, Bobit Business Media

If the number of survey respondents could speak to the health of an industry, then this year’s results should signal strength.

The annual LCT Fact Book operator survey drew more than 460 respondents — the most since before the Great Recession — yielding a margin of error of ±4.3% and a 99% confidence level.

Of course, in the age of digital media — crammed e-mail boxes, relentless e-promos and blasts, and distracted attention spans — getting a survey done becomes all the more challenging. Once again, we took what we learned from previous surveys and further recalibrated, rephrased and revamped the questions and answer options to cut the time needed to fill it out.

Numbers and statistics can be sliced and diced many ways. These pages sum up straightforward results based on survey participation.

Overall, the number of limousine operators held steady, year over year, due to two reasons we have observed anecdotally and heard from informed sources:

1. The number of new limousine companies entering the industry has been growing, but
2. The number of mergers and acquisitions among established companies has risen as well [See p. 112].

Meanwhile, the number of motorcoach operators stands about even as well, according to the American Bus Association, whose figures we cited.

When compiling the limo company total, LCT counts single owner/operators only, not the number of limousine companies, or DBAs (Doing Business As). One operator, for example, could own three separately branded and named transportation services. We count that operator as ONE, not THREE, which is more accurate from many standpoints, including vendor/suppliers. That single operator likely makes purchasing decisions for all three companies.

Most respondents, 55%, were small fleet operators (1-10 vehicles); followed by medium-size fleets, 32%, (11-50 vehicles); and large fleets, 13%, (51-plus vehicles).

One last caveat to remember: This annual survey, more than any other, was taken in the age of TNCs, apps, and explosion in part-time independent drivers for TNCs. The fact that the chauffeured transportation industry has held its own so far while adapting to major competitive shifts should be encouraging.

An industry focused on superior service quality, sound business integrity, industry involvement, technology adoption, and regulatory respect will propel operators forward.

— Martin@lctmag.com

2014 GROSS LIMOUSINE INDUSTRY ESTIMATED REVENUE

$3.3 BILLION

UP 11.5% FROM 2013
2 NUMBER OF OPERATORS

8,305 limo/chauffeured operators
Source: List Strategies Inc.

3,801 motorcoach/charter & tour operators
Source: American Bus Association

2015

12,106

3 NUMBER OF CHAUFFEURED VEHICLES IN SERVICE:

108,000

Average chauffeured fleet size:

2010 2011 2012 2013 2014

16 17 18 24 25 23

Median figure was 9 vehicles
Median figure was 10 vehicles
Median figure is 10 vehicles

4 2014 VEHICLE FLEET SALES

Sedans/CUVs: 4,608
SUVs: 677
Large Vans: 827
Stretch Limos/All Buses: 4,340

Motorcoach/Charter & Tour Industry Estimated Revenue:

$2.59 Billion

Sources: Statista.com

5 PROFIT MARGINS

The average operator/limousine company gross profit margin in 2014 was 20.7%, up from an average of 18.7% in 2013, an average of 16.7% in 2012 and 10% in 2011.

Note: All figures include only vehicles built/sold to the limousine industry. Funeral and private vehicles excluded from totals.

Total Limo/Bus Production

<table>
<thead>
<tr>
<th>YEAR</th>
<th>QUAN.</th>
</tr>
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<tbody>
<tr>
<td>1982</td>
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<td>1983</td>
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<td>2011</td>
<td>716</td>
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<tr>
<td>2012</td>
<td>1996</td>
</tr>
<tr>
<td>2013</td>
<td>4850</td>
</tr>
<tr>
<td>2014</td>
<td>5167*</td>
</tr>
</tbody>
</table>

(*stretches, buses, vans)
Operator Survey Results

The 2015 survey focuses on the operational and business details of chauffeured transportation companies. All statistics are based on the 460-plus operators who responded to the detailed survey. On certain questions, responses that were considered anomalies or outliers were not included in final calculations to avoid exaggerated totals.

Compiled by Tom Halligan and Martin Romjue, LCT editors

CHAUSSIZED FLEETS

Small fleet operators (1-10 vehicles) .................. 55%
Medium fleet operators (11-50 vehicles) ........... 32%
Large fleet operators (51+ vehicles) ................. 13%

What % of your fleet vehicles are bought new vs. bought pre-owned?
New: 46%
Pre-owned/used: 54%

Have you ever bought a fleet vehicle through Limoforsale.com online trading website?
Yes: 11%
No: 89%

Vehicle Purchasing
When factoring in chauffeured transportation companies of all sizes, the typical limousine operator plans to buy an average of three sedans, two SUVs, one stretch limousine, one van, and one shuttle/mini-bus in 2015.

Fleet Vehicles

Based on all operator responses, below are figures for:
1. Average number of vehicles in a fleet: 23
2. Median number of vehicles in a fleet: 10
3. Average hourly base rate (all vehicles): $80.80

<table>
<thead>
<tr>
<th>Vehicle Type</th>
<th>Fleet No.</th>
<th>Rate</th>
<th>Planned 2015 Vehicle Purchase</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sedans/Crossovers</td>
<td>7</td>
<td>$59.43</td>
<td>2</td>
</tr>
<tr>
<td>SUVs</td>
<td>4</td>
<td>$79.82</td>
<td>1</td>
</tr>
<tr>
<td>Stretch limousines</td>
<td>3</td>
<td>$91.70</td>
<td>1</td>
</tr>
<tr>
<td>Vans</td>
<td>2</td>
<td>$72.99</td>
<td>2</td>
</tr>
<tr>
<td>Shuttles/mini-buses</td>
<td>3</td>
<td>$91.51</td>
<td>1</td>
</tr>
<tr>
<td>Limo/party buses</td>
<td>1</td>
<td>$108.53</td>
<td>N/A</td>
</tr>
<tr>
<td>Motorcoaches</td>
<td>3</td>
<td>$61.63</td>
<td>1</td>
</tr>
</tbody>
</table>

 Runs/Reservations

These charts show the average number of runs/reservations per month based on fleet sizes.

Where Do Operators Get Reservations From?

<table>
<thead>
<tr>
<th>Source</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phone-ins</td>
<td>90%</td>
</tr>
<tr>
<td>Company website</td>
<td>84%</td>
</tr>
<tr>
<td>Third-party limo websites/lead referral services</td>
<td>43%</td>
</tr>
<tr>
<td>Regional/local travel/tourism sources (CVBs/Chambers)</td>
<td>37%</td>
</tr>
<tr>
<td>Industry association directories</td>
<td>35%</td>
</tr>
<tr>
<td>Specialty websites (weddings, proms, special events)</td>
<td>29%</td>
</tr>
<tr>
<td>Travel booking websites</td>
<td>26%</td>
</tr>
</tbody>
</table>

GROSS REVENUES

2014 Company Gross Revenues (all respondents)

<table>
<thead>
<tr>
<th>Revenue Range</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>$300,000 or less</td>
<td>44%</td>
</tr>
<tr>
<td>$301,000 - $600,000</td>
<td>15%</td>
</tr>
<tr>
<td>$601,000 - $1 million</td>
<td>12%</td>
</tr>
<tr>
<td>$1.1 million - $5 million</td>
<td>18%</td>
</tr>
<tr>
<td>$5.1 million - $10 million</td>
<td>5%</td>
</tr>
<tr>
<td>Over $10 million</td>
<td>6%</td>
</tr>
</tbody>
</table>

Small Operators 2014 Gross Revenues

<table>
<thead>
<tr>
<th>Revenue Range</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>$300,000 or less</td>
<td>73%</td>
</tr>
<tr>
<td>$301,000 - $600,000</td>
<td>19%</td>
</tr>
<tr>
<td>$601,000 - $1 million</td>
<td>8%</td>
</tr>
<tr>
<td>$1.1 million - $5 million</td>
<td>0%</td>
</tr>
<tr>
<td>$5.1 million - $10 million</td>
<td>0%</td>
</tr>
</tbody>
</table>

Medium Operators 2014 Gross Revenues

<table>
<thead>
<tr>
<th>Revenue Range</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>$300,000 or less</td>
<td>6%</td>
</tr>
<tr>
<td>$301,000 - $600,000</td>
<td>14%</td>
</tr>
<tr>
<td>$601,000 - $1 million</td>
<td>24%</td>
</tr>
<tr>
<td>$1.1 million - $5 million</td>
<td>49%</td>
</tr>
<tr>
<td>$5.1 million - $10 million</td>
<td>7%</td>
</tr>
</tbody>
</table>

Large Operators 2014 Gross Revenues

<table>
<thead>
<tr>
<th>Revenue Range</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>$300,000 or less</td>
<td>0%</td>
</tr>
<tr>
<td>$301,000 - $600,000</td>
<td>0%</td>
</tr>
<tr>
<td>$601,000 - $1 million</td>
<td>0%</td>
</tr>
<tr>
<td>$1.1 million - $5 million</td>
<td>20%</td>
</tr>
<tr>
<td>$5.1 million - $10 million</td>
<td>24%</td>
</tr>
<tr>
<td>Over $10 million</td>
<td>56%</td>
</tr>
</tbody>
</table>
Online Sources
An average of 35% of all limousine service reservations come from Internet/online sources, such as websites, mobile apps and social media sites.

2014 Gross Revenue Changes
Increased: 66% of operators
Decreased: 15% of operators
Stayed Flat: 19% of operators

The average percent revenue increase from 2014 to 2015 among those respondents reporting an increase was 22.15%.
The average percent revenue decrease from 2014 to 2015 among those respondents reporting a decrease was 20.23%.
The median gross profit margin (before taxes) for limousine operators in 2014 was 16%. The average was 20.7%.

FARM-IN/FARM-OUTS
What percentage of your gross corporate revenue comes from affiliated partners (farm-ins)?

16%

EXPENSES
Q: What percentages of your total gross revenues are devoted to the following business expenses?

Small Operators (1-10 vehicles)
- Payments: 17%
- Labor/wages/benefits: 23%
- Facilities mortgage or rent: 7%
- Technology/Systems: 5%
- Vehicle insurance: 15%
- Vehicle maintenance: 11%
- Fuel: 16%
- Marketing/advertising/PR: 6%

Medium Operators (11-50 vehicles)
- Payments: 14%
- Labor/wages/benefits: 31%
- Facilities mortgage or rent: 8%
- Technology/Systems: 5%
- Vehicle insurance: 13%
- Vehicle maintenance: 9%
- Fuel: 13%
- Marketing/advertising/PR: 7%

Large Operators (51+ vehicles)
- Payments: 18%
- Labor/wages/benefits: 38%
- Facilities mortgage or rent: 7%
- Technology/Systems: 5%
- Vehicle insurance: 9%
- Vehicle maintenance: 9%
- Fuel: 10%
- Marketing/advertising/PR: 6%

STAFFING
The survey looked at key positions in a chauffeured transportation company: chauffeurs, dispatchers/reservationists, sales/marketing, and mechanics.

Full Time
- Chauffeurs: 18
- Dispatchers/Reservationists: 4
- Sales/Marketing: 2
- Mechanics: 2

Part Time
- Chauffeurs: 11
- Dispatchers/Reservationists: 2
- Sales/Marketing: 0
- Mechanics: 1

Hourly Wages
- Chauffeurs: $15.80
- Dispatchers/Reservationists: $12.54
- Sales/Marketing: $11.99
- Mechanics: $15.52

RATES
Service Tiers
36% of all operators now offer different tiers of chauffeured/fleet service based on price.

Surge Pricing
- 11% of operators adjust rates/prices all the time
- 24% of operators adjust rates/prices at select hours or peak time periods
- 64% never adjust rates/prices

FARM-IN/FARM-OUTS
What percentage of your business is farm-out to affiliates?

19%
Employed Chauffeurs & Independent Contractors
Q: Of your chauffeurs, what percentage are employees vs. independent contractors?

65% Employees
35% Contractors

Q: Which of these positions do you plan to add in 2015?

CHAUFFEURS
90%
SALES
35%
RESERVATIONISTS
48%

Q: Do you allow your chauffeurs to participate in on-demand reservations (such as Uber or a TNC)?

YES 10%
NO 90%

Q: Does your company have its own-branded mobile app?
Yes .................................................. 19%
No ................................................... 81%

Q: Does your app enable on demand/real-time reservations?
Yes .................................................. 68%
No ................................................... 32%

Q: Does your app enable future/planned reservations?
Yes .................................................. 91%
No ................................................... 9%

Q: Does your app provide real-time trip information/updates to clients?
Yes .................................................. 77%
No ................................................... 23%

Q: Does your company belong to an integrated app network via an industry technology vendor, such as Limo Anywhere?
Yes .................................................. 34%
No ................................................... 66%

Q: Do you offer reservationists sales commission/bonus?

YES 37%
NO 63%

Q: What percentage OR dollar amount of sales commission/bonus do you offer reservationists.

Average 8%
Median 5%

Q: Do you answer phones live 24/7?

20% - NO
80% - YES

Q: What technology products/services do you use?
Chauffeur communication via smartphones ........... 85%

IPads/tablets for customer name greetings ........... 58%
GPS fleet tracking software ........................... 49%

Internet cloud data storage ............................. 40%
Mobile booking apps .................................... 31%

Online chauffeur/driver training ......................... 28%

Fleet maintenance software ............................. 29%

Vehicle camera and/or data recorders ............... 24%

Q: What technology products/services do you use?

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Q: How much business has your company lost, or not, because of Uber and/or TNCs?
None, TNCs do not affect our market/client base .... 53%
None, because we do business with TNCs ............ 2%
10% or less ........................................... 26%
11% to 20% ........................................... 9%
More than 20% ...................................... 9%

TECHNOLOGY

Ever-changing mobile- and Internet-based technologies reshape many of the questions asked on this survey from year to year. Technology, particularly mobile app-based rideshare services and a trend toward on-demand reservations, have emerged as the primary industry technology challenges for 2015.

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NO 90%

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Yes .................................................. 77%
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Yes .................................................. 34%
No ................................................... 66%

2015-2016 LCT FACT BOOK: INDUSTRY SURVEY

© LCT MAGAZINE 2015
**SOCIAL MEDIA USAGE**

Q: If you have a Facebook page for your operation, how often do you post to it?
- At least once every day or more: 14%
- Once every few days: 19%
- Once a week: 15%
- About once a month: 25%
- Never: 13%
- Our operation does not have a Facebook page: 14%

Q: If you have a Twitter page for your operation, how often do you post to it?
- At least once every day or more: 10%
- Once every few days: 8%
- Once a week: 8%
- About once a month: 16%
- Never: 22%
- Our operation does not have a Twitter page: 36%

Q: How do you delegate social media management for your business?
- Owner/operator also manages social media when has the time: 54%
- An office staff member manages social media along with primary, non-marketing related job duty: 25%
- An in-house employee is devoted entirely to social and digital media: 11%
- An outside firm is contracted: 10%

Q: Which of these phrases best describes your company social media strategy?
- Actively trying to establish new business leads: 18%
- Treating social media as an extension of branding: 29%
- Social media avenues are mainly for fielding customer feedback: 7%
- A tool for customer retention tools using promotional offers and deals: 2%
- A consistent blend of all of the above: 44%

Q: In general, how satisfied are you with the outcome of your work/professional social media activities?
- Very satisfied: 18%
- Somewhat satisfied: 35%
- Neither satisfied nor dissatisfied: 30%
- Somewhat dissatisfied: 9%
- Very dissatisfied: 9%

Q: Which do you value more about social media, the sending/sharing of information or receiving/viewing of information?
- Sending/Sharing: 17%
- Receiving/Viewing: 15%
- Value both equally: 68%

Q: Do you use any social media monitoring or measurement tools?
- Yes: 36%
- No: 64%

Q: Please select the **TOP 3** primary sources you use to advertise your business.
- Online directories/services: 54%
- Social Media: 52%
- Community Involvement: 46%
- Google Searches (Paid): 38%
- Print Newspapers/Magazines: 29%
- E-Promos: 14%
- Direct Mail: 14%
- Radio: 11%
- Television: 3%
### Industry Challenges

**Q:** What are the TOP 5 industry- or business-related challenges concerning you?

<table>
<thead>
<tr>
<th>Challenge</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Insurance rates</td>
<td>65%</td>
</tr>
<tr>
<td>Transportation regulations (fed/state/local)</td>
<td>56%</td>
</tr>
<tr>
<td>Fuel costs</td>
<td>50%</td>
</tr>
<tr>
<td>TNCs (Uber/mobile app companies)</td>
<td>44%</td>
</tr>
<tr>
<td>Sedan vehicle choices</td>
<td>42%</td>
</tr>
<tr>
<td>Rates/pricing pressures</td>
<td>42%</td>
</tr>
<tr>
<td>Airport rules/fees</td>
<td>35%</td>
</tr>
<tr>
<td>Wage/labor rules re: chauffeurs/drivers</td>
<td>30%</td>
</tr>
<tr>
<td>Limousine/vehicle safety</td>
<td>20%</td>
</tr>
<tr>
<td>Service commoditization</td>
<td>14%</td>
</tr>
<tr>
<td>Other</td>
<td>11%</td>
</tr>
<tr>
<td>Employee/chauffeur lawsuits</td>
<td>9%</td>
</tr>
</tbody>
</table>

### About Operators

**State Shares Of Limo Operators**

- **California:** 16%
- **Texas:** 6%
- **New York:** 6%
- **Florida:** 5%
- **New Jersey:** 5%
- **All Others:** 62%
Motorcoach Industry Facts & Figures

The motorcoach sector for ground transportation has seen numbers decrease slightly for total service providing companies, but the number of motorcoaches on the road has increased. Larger operators appear to be investing in more equipment. Here are some highlights of the latest data and statistics on the motorcoach/charter and tour industry:

Compiled by Tim Crowley, LCT senior editor

GENERAL STATISTICS

No. of motorcoach companies in the U.S. and Canada: 3,801

No. of motorcoaches in use by companies in the U.S. and Canada: 36,903

No. of passenger trips in 2013: 605.1 million

No. of total miles: 1.86 billion

Service miles (miles with passengers): 1.68 billion

Fuel consumed (gallons): 303.6 million

Passenger trips per motorcoach: 16,400

Miles traveled per motorcoach: 50,400

Service miles traveled per motorcoach: 45,400

Passengers per service mile: 37.6

Miles per gallon of fuel: 6.1

Percentage of U.S. and Canada motorcoach carriers that have experienced competition from transit agencies: 36%

Demographics of Motorcoach Passenger Trips

Students: 21%
Seniors: 28%
Adults and young adults: 51%

Percentage of Motorcoach Service Mileage in 2013 by Type of Service

1. Charter: 48%
2. Scheduled service: 34%
3. Commuter: 6%
4. Tour: 6%
5. Airport: 2%
6. Sightseeing: 2%
7. Special operations: 1%

Breakdown of Motorcoach Carriers by Fleet Size in U.S. and Canada

<table>
<thead>
<tr>
<th>Fleet Size</th>
<th>Total Carriers</th>
</tr>
</thead>
<tbody>
<tr>
<td>100 or more</td>
<td>19</td>
</tr>
<tr>
<td>50 to 99</td>
<td>50</td>
</tr>
<tr>
<td>25 to 49</td>
<td>155</td>
</tr>
<tr>
<td>10 to 24</td>
<td>462</td>
</tr>
<tr>
<td>1 to 9</td>
<td>3,115</td>
</tr>
<tr>
<td>Total</td>
<td>3,801</td>
</tr>
</tbody>
</table>

Percentage of Motorcoaches Leased vs. Purchased

<table>
<thead>
<tr>
<th>Motorcoach Fleet Size</th>
<th>Leased</th>
<th>Purchased</th>
</tr>
</thead>
<tbody>
<tr>
<td>100 or more</td>
<td>13%</td>
<td>87%</td>
</tr>
<tr>
<td>50 to 99</td>
<td>13%</td>
<td>87%</td>
</tr>
<tr>
<td>25 to 49</td>
<td>13%</td>
<td>87%</td>
</tr>
<tr>
<td>10 to 24</td>
<td>12%</td>
<td>88%</td>
</tr>
<tr>
<td>1 to 9</td>
<td>14%</td>
<td>87%</td>
</tr>
<tr>
<td>Industry Total</td>
<td>13%</td>
<td>87%</td>
</tr>
</tbody>
</table>

Percentages of Motorcoach Carriers by Year Founded

Year Founded

- 1920-1929: 9%
- 1930-1939: 11%
- 1940-1949: 18%
- 1950-1959: 24%
- 1960-1969: 30%
- 1970-1979: 35%
- 1980s: 40%
- 1990s: 45%
- 2000-Present: 50%
MOTORCOACH EMPLOYMENT
The motorcoach industry provided jobs to 133,200 people in 2013. On average, the motorcoach industry provides 3.6 jobs per motorcoach.

Motorcoach Vehicle Mileage in 2013 by Fleet Size

Motorcoach Fuel Efficiency
Motorcoaches are one of the most environmentally efficient means of traveling, with the highest average passenger miles per gallon, and the lowest CO₂ emissions per passenger mile. Take a look at how motorcoaches stack up against other forms of group transportation.

Top Motorcoach Fleets (total buses and coaches)
1. FirstGroup America / Cincinnati (12,500)
2. Coach USA Inc. / Paramus, N.J. and Coach Canada / Peterborough, Ontario (2,450)
3. Evergreen Trails DBA Horizon Coach Lines Dallas (1,039)
4. Academy Bus Companies Hoboken, N.J. (1,039)
5. Pacific Western Group of Companies Calgary, AB (821)
6. All Aboard America Holdings New Orleans, La. (449)
7. Easton Coach Co. / Easton, Pa. (365)
8. Royal Hyway Tours Inc. Fairbanks, Alaska (327)
9. Kings Highway / Wolfforth, Texas (321)

Source: Metro Magazine Top 50 Motorcoach Fleets


Motorcoach Fuel Efficiency
Motorcoaches are one of the most environmentally efficient means of traveling, with the highest average passenger miles per gallon, and the lowest CO₂ emissions per passenger mile. Take a look at how motorcoaches stack up against other forms of group transportation.

Motorcoach Fleet Size | Passenger Miles per Gallon | CO₂ Released per Passenger Mile
--- | --- | ---
Motorcoach | 240 | 43
Heavy Rail | 191 | 127
Trolley Bus | 107 | 228
Van Pool | 106 | 97
Light Rail | 92 | 264
Commuter Rail | 90 | 183
InterCity Rail (Amtrak) | 85 | 147
Transit Bus | 71 | 136
Car Pool (2+ person) | 56 | 184
Domestic Air Travel | 56 | 188

*CO₂ is measured in grams per passenger mile • based on infographic: http://www.buses.org/files/Foundation/ABAF-Fuel-&-CO2-Comparison-2014.pdf • Source: Updated Comparison of Energy Use & CO₂ Emissions From Different Transportation Modes, M.J. Bradley & Associates, LLC
Going Beyond The Survey

The chauffeured transportation industry is closely linked with many other economic sectors it depends on for business.

Compiled by Tim Crowley and Tom Halligan

LCT checked in with multiple transportation, business travel, convention and hospitality related sources to provide supplementary statistics of interest to chauffeured transportation operators.

Expected Overall Business Travel Spending in the U.S. in 2015

$310.2 BILLION

Source: Global Business Travel Association

Top 10 Meeting / Convention Cities in U.S.

1. Chicago
2. Orlando
3. Las Vegas
4. Atlanta
5. San Diego
6. New York
7. Dallas
8. Washington, D.C.
9. New Orleans
10. Nashville

Source: Cvent (2014 rankings)

Projected 2015 total person-trip volume

490.4 MILLION TRIPS

Source: Global Business Travel Association

TOP 10

U.S. Convention Center Visits

1. McCormick Place, Chicago
2. Las Vegas Convention Center
3. Washington, D.C. Convention Center
4. Orange County Convention Center (FL)
5. Georgia World Congress Center, Atlanta
6. Dallas Convention Center
7. The Moscone Center, San Francisco
8. Nashville Convention Center
9. San Diego Convention Center

Source: Meeting Source.com

5 BEST Convention Centers in the World

1. Orange County Convention Center, Florida
2. Adelaide Convention Center, Australia
3. Vancouver Convention Center, Canada
4. The Hong Kong Convention and Exhibition Center, Hong Kong
5. Dubai International Convention and Exhibition Center, Dubai

Source: World Luxury Tourism

TOP 10

U.S. Meeting Hotels

1. ARIA Resort & Casino – Las Vegas, NV
2. Gaylord Opryland Resort & Convention Center – Nashville, TN
3. The Venetian and Palazzo Resort, Hotel & Casinos – Las Vegas, NV
4. Omni Nashville Hotel – Nashville, TN
5. Hyatt Regency Chicago – Chicago, IL
6. Hilton San Diego Bayfront – San Diego, CA
7. Gaylord Texan Resort & Convention Center – Grapevine, TX
8. Hilton Anatole – Dallas, TX
9. Fontainebleau – Miami Beach, FL
10. The Cosmopolitan of Las Vegas, Autograph Collection – Las Vegas, NV

Source: Cvent

TOP 10

Best Places to Start a Business in 2015

1. Boulder, CO
2. Wilmington, NC
3. Bridgeport-Norwalk-Stamford area, CT
4. Evansville, IN
5. Portland, ME
6. Cedar Rapids, IA
7. Beaumont-Port Arthur, TX
8. Green Bay, WI
9. Fort Wayne, IN
10. Peoria, IL

Source: Forbes
**TOP 10 Countries Visiting The U.S.**
1. Canada
2. Mexico
3. United Kingdom
4. Japan
5. Brazil
6. Germany
7. China
8. France
9. South Korea
10. Australia

Source: US Office of Travel and Tourism Industries

**The U.S. Department of Commerce** forecasts that international tourism to the U.S. is expected to grow to **88.3 Million** annual visitors by 2019, a **27%** increase and more than **18 Million** more visitors than arrived in the U.S. in 2013.

Source: US Department of Commerce

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**Five States with HIGHEST Sales Tax**
Criteria: state tax + average of local taxes
1. Tennessee: 9.45%
2. Arkansas: 9.26%
3. Alabama: 8.91%
4. Louisiana: 8.91%
5. Washington: 8.89%

Source: Tax Foundation (as of 4-8-2015)

**Five States with NO sales tax**
1. Delaware: none
2. Montana: none
3. New Hampshire: none
4. Oregon: none
5. Alaska: none

Source: Tax Foundation (as of 1.1-2015)

**States with HIGHEST personal income tax rates**
1. California: 13.3%
2. Hawaii: 11%
3. Minnesota: 9.85%
4. Oregon: 9.9%
5. Iowa: 8.98%

Source: Tax Foundation (4-15-2015)

**States with NO personal income tax**
1. Alaska
2. Florida
3. Nevada
4. New Hampshire (taxes only dividend and interest income)
5. South Dakota
6. Tennessee (taxes only dividend and interest income)
7. Texas
8. Washington
9. Wyoming

Source: Tax Foundation (as of 2014)

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**Ground Transportation Employment by Occupation**
Bus drivers, school ................................................... 196,520
Taxi drivers and chauffeurs ........................................ 78,910
Bus drivers, transit and intercity ................................ 65,110
Dispatchers, except police, fire, and ambulance .......... 17,620
Bus and truck mechanics and diesel engine specialists ........................................................ 12,510


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**$35.6 BILLION**
Expected U.S. Outbound Travel Spending in 2015

Source: Global Business Travel Association

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**Expected U.S. Outbound Travel Spending in 2015**

Source: Global Business Travel Association

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**TOP 10 Countries Visiting The U.S.**
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Source: Tax Foundation (as of 4-8-2015)
Regular Grade Gasoline Prices at Retail Outlets By Region
MAY 4, 2015

Note: Includes taxes
Source: US Energy Information Administration, EIA-878 Motor Gasoline Price Survey

Average Cost of Fuel Per Gallon
In the U.S. By Year
2014: $3.36  2000: $1.48
2013: $3.59  1995: $1.11
2012: $3.62  1990: $1.30
2009: $2.35
Source: US Energy Information Administration

TOP 10 Countries Americans Travel To The Most
1. Mexico
2. Canada
3. U.K.
4. Dominican Republic
5. France
6. Italy
7. Germany
8. Jamaica
9. China
10. Spain
Source: U.S. National Travel and Tourism Office

TOP 10 most expensive U.S. business travel cities in 2014
1. San Francisco
2. New York
3. Boston, MA
4. Washington, DC
5. Los Angeles, CA
6. White Plains, NY
7. Honolulu, HI
8. Miami, FL
9. Seattle, WA
10. Newark, NJ
Source: 2014 Corporate Travel Index by Business Travel News

TOP 10 Most Luxurious Hotel Chains
1. Four Seasons Hotels and Resorts
2. Mandarin Oriental
3. Oberoi Hotels and Resorts
4. Peninsula Hotels
5. Shangri-La Hotels
6. Fairmount Hotels and resorts
7. Ritz-Carlton
8. Park Hyatt
9. JW Marriott
10. Couples Resorts
Source: USA Today

TOP 10 Busiest Airports: Passenger Traffic
1. Atlanta Hartsfield-Jackson: 96.1 million
2. Beijing: 86.1 million
3. London Heathrow: 73.4 million
4. Tokyo Haneda: 72.8 million
5. Los Angeles International: 70.6 million
6. Dubai International: 70.4 million
7. Chicago O’Hare: 70 million
8. Paris Charles de Gaulle: 63.8 million
9. Dallas/Fort Worth: 63.5 million
10. Hong Kong International: 63.1 million
Source: Airports Council International, 2014

Uber at a Glance
• In December 2014, Uber had in the U.S. 162,037*active drivers on its platform (*completed at least four or more trips)
• On average, Uber drivers make $19 per hour
• 14% of Uber drivers are women
Source: In the Driver’s Seat: A Closer Look At The Uber Partner Experience, Jan. 2015. LCT

2.69
PER GALLON
Average Cost of Gasoline in the U.S. as of May 11, 2015
Source: U.S. Energy Information Administration

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