

METRO[®] MAGAZINE



A BOBIT PUBLICATION • SERVING BUS AND RAIL TRANSIT & MOTORCOACH OPERATIONS SINCE 1904

2008 FACT BOOK

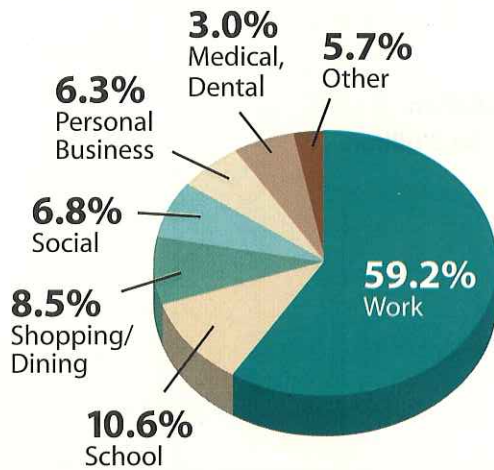
- 9 Pages of Industry Statistics
- Manufacturer Directories
- 253 Industry Contacts
- 305 Cross-Referenced Suppliers

#BXNHZT ***CR LOT 0060A**C-029 00035
 #57352018 CH HT 0703 21 02447
 MADISON KAMP GENERAL MANAGER
 MADISON METRO
 1101 E WASHINGTON AVE
 MADISON WI 53703-3052

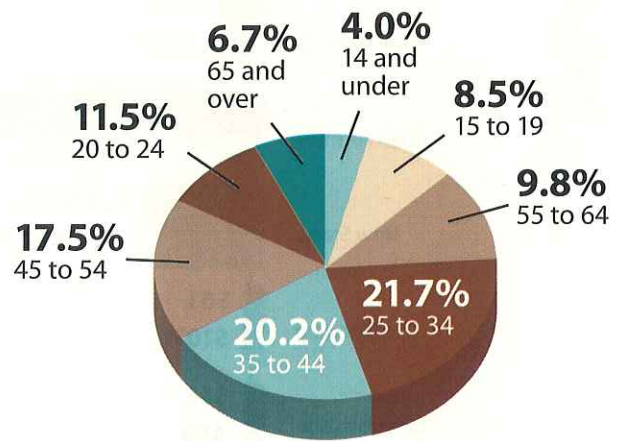
- Transportation Glossary
- 105 Consultant Listings
- Editorial Index

Profile of Public Transportation Passengers

Trip Purpose of Transit Passengers



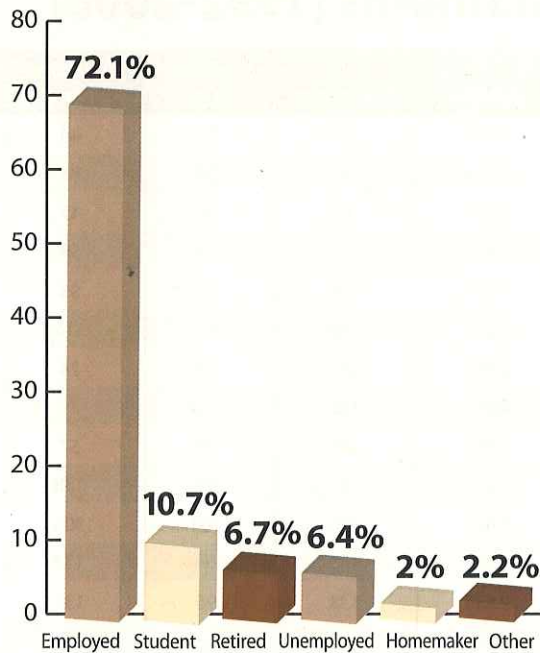
Age of Transit Passengers



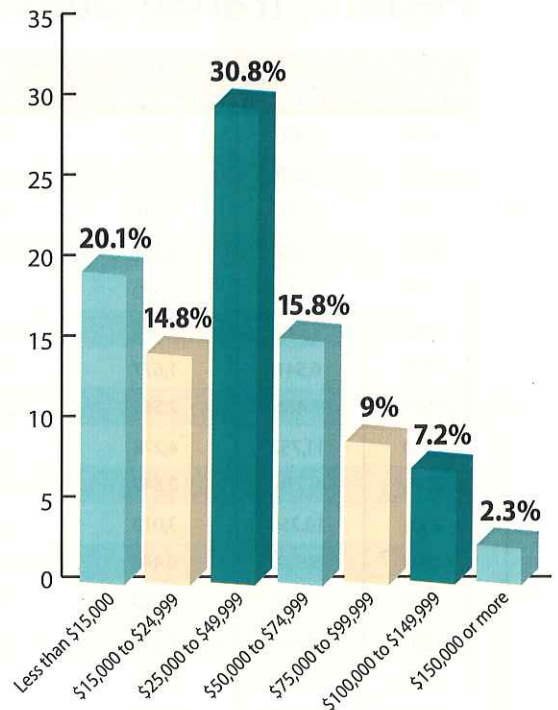
With the majority of riders falling between 20 and 64 years of age, these numbers reflect the most common reasons riders use transit: trips to work and school.

Source: APTA

Primary Occupation of Transit Passengers



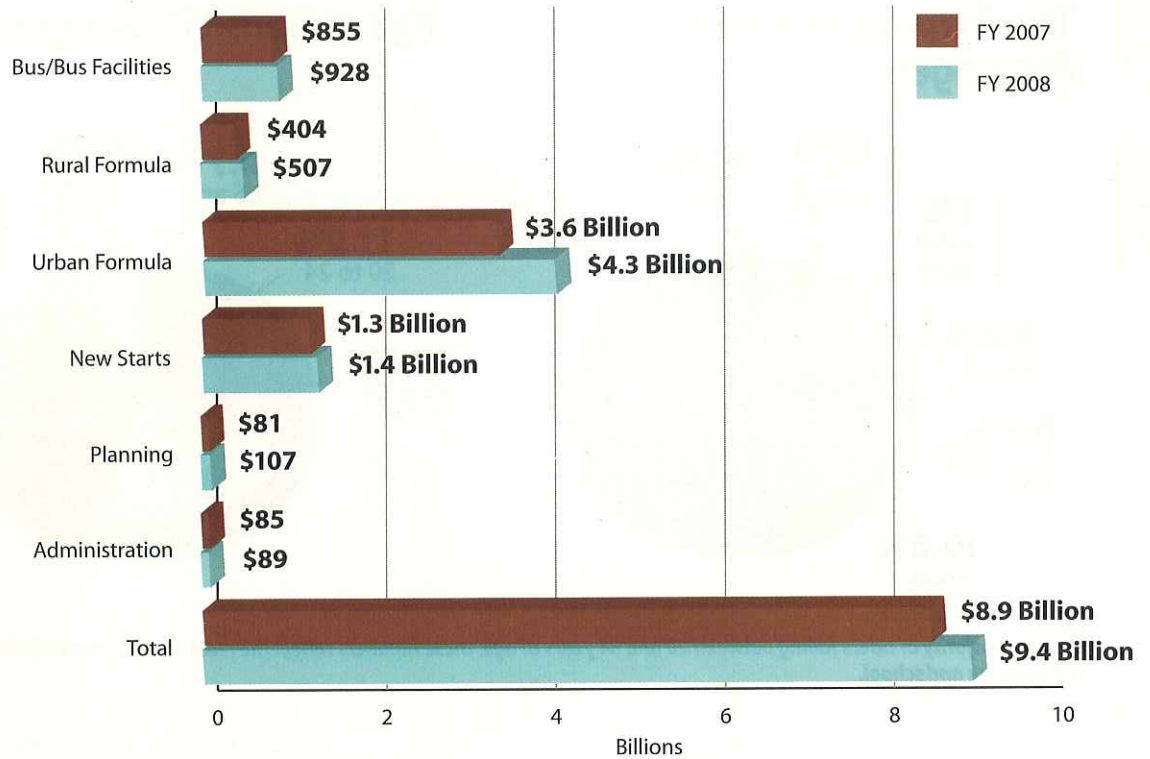
Household Income of Transit Passengers



According to data collected by APTA, the average transit rider is employed and earns between \$15,000 and \$75,000 per year. Second-most common riders are students and retirees.

Source: APTA

FTA budget allocations (two-year comparison)



The \$9.4 billion total is a \$547 million markup or 6% above the \$8.9 billion requested for FY '07. Numbers in selected spending categories are in millions unless specified.

Source: FTA

Federal transit bus commitments (1992-2006)

| FY | TOTAL | 35' & 40' Standard | 30' or less | Vans | Articulated | Trolley Style | Intercity Commuter | Other |
|--------------|----------------|--------------------|---------------|---------------|--------------|---------------|--------------------|--------------|
| 1992 | 3,070 | 1,728 | 573 | 705 | 5 | 11 | 40 | 8 |
| 1993 | 5,239 | 2,628 | 1,173 | 1,114 | 145 | 94 | 85 | 0 |
| 1994 | 5,545 | 3,138 | 960 | 1,333 | 38 | 29 | 47 | 0 |
| 1995 | 6,357 | 3,257 | 1,393 | 1,484 | 97 | 36 | 90 | 0 |
| 1996 | 5,152 | 2,532 | 933 | 1,363 | 23 | 27 | 95 | 179 |
| 1997 | 7,021 | 1,880 | 1,702 | 2,886 | 172 | 67 | 115 | 199 |
| 1998 | 6,541 | 1,677 | 2,080 | 2,504 | 189 | 54 | 24 | 13 |
| 1999 | 8,486 | 2,566 | 2,318 | 2,873 | 338 | 159 | 59 | 173 |
| 2000 | 11,752 | 4,278 | 3,050 | 3,901 | 246 | 138 | 57 | 82 |
| 2001 | 9,276 | 2,847 | 2,812 | 3,218 | 137 | 84 | 138 | 40 |
| 2002 | 10,259 | 3,018 | 2,869 | 3,681 | 175 | 104 | 305 | 107 |
| 2003 | 8,952 | 2,448 | 2,840 | 3,226 | 175 | 64 | 132 | 67 |
| 2004 | 7,333 | 1,319 | 2,666 | 2,833 | 138 | 96 | 135 | 146 |
| 2005 | 8,755 | 2,251 | 2,863 | 3,218 | 62 | 64 | 7 | 290 |
| 2006 | 9,439 | 2,792 | 3,172 | 3,045 | 114 | 85 | 24 | 207 |
| TOTAL | 113,177 | 45,403 | 31,404 | 37,384 | 2,054 | 1,112 | 1,353 | 1,511 |

The number of vehicles the federal government has subsidized. The total number of vehicles has risen 7% comparing 2005 to 2006.

Source: FTA

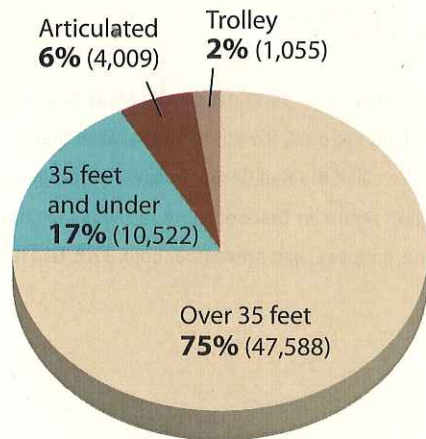
Top 100 Transit Bus Fleets

| '07 | '06 | Agency | 35 ft. and under | Over 35 ft. | Artic. | Trolley | 2007 Total | 2006 +/- |
|-----|-----|--|------------------|-------------|--------|---------|------------|----------|
| 1 | 1 | MTA New York City Transit New York City | 0 | 3,968 | 629 | 0 | 4,597 | 77 |
| 2 | 2 | New Jersey Transit Corp. Newark, N.J. | 119 | 2,871 | 85 | 0 | 3,075 | 67 |
| 3 | 3 | Metropolitan Transportation Authority Los Angeles | 5 | 2,392 | 289 | 0 | 2,686 | -2 |
| 4 | 4 | Chicago Transit Authority Chicago | 43 | 1,931 | 226 | 0 | 2,200 | -127 |
| 5 | 5 | Toronto Transit Commission Toronto | 0 | 1,599 | 0 | 0 | 1,599 | -62 |
| 6 | 7 | Montreal Urban Transit * Montreal | 2 | 1,573 | 0 | 0 | 1,575 | 12 |
| 7 | 6 | Pace Suburban Bus Arlington Heights, Ill. | 1,114 | 450 | 0 | 7 | 1,571 | -16 |
| 8 | 8 | Washington Metropolitan Area Transit Authority Washington, D.C. | 128 | 1,310 | 61 | 0 | 1,499 | 14 |
| 9 | 10 | Southeastern Pennsylvania Transportation Authority Philadelphia | 113 | 1,103 | 155 | 0 | 1,371 | -3 |
| 10 | - | MTA Bus Company New York City <small>*Denotes 2006 numbers.</small> | 0 | 1,324 | 0 | 0 | 1,324 | - |

Topping the list once again was New York City Transit with 4,597 buses; a slight increase of 77 buses compared to 2006, while New Jersey Transit is the agency in the top five other than NYCT to grow its fleet. Use of alternative-fueled vehicles grew 31% from 10,147 buses in 2006 to 13,339 in 2007. Transit agencies plan on purchasing 5,782 buses in 2008, a 10% increase from 2006's numbers.

Source: METRO Magazine

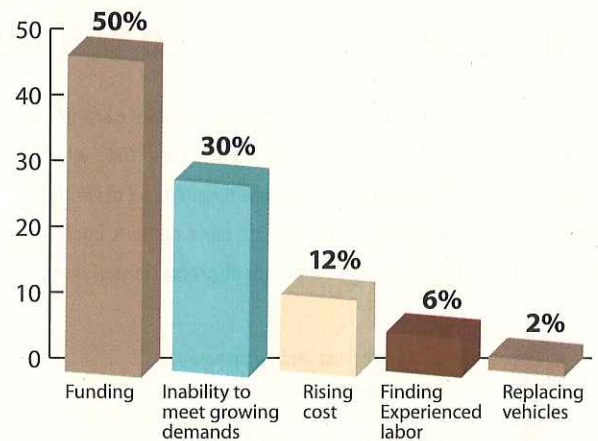
Fleet mix



With being green becoming both a national and international phenomenon, the number in vehicles listed (63,174) rose 4%, or 2,775 buses, over 2006.

Source: METRO Magazine

Transit agencies' top concern



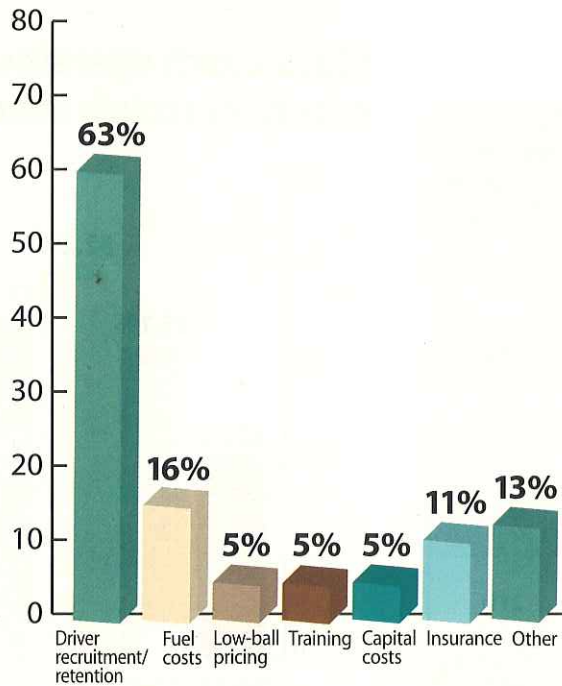
More than half of the transit agencies who responded say that funding is their top concern, followed by the inability to meet growing demands (30%) and rising costs (12%). (Note: Because some agencies had multiple answers, percentages are based on top answer supplied.)

Top 10 Motorcoach Operators for 2007

| Ranking 2007 | Ranking 2006 | Company | Total Buses and Coaches | Motorcoaches | Non-Motorcoach Buses | Total 40-Foot Buses and Coaches | Total Shorter Than 40 Ft. | Total Longer Than 40 Ft. | Plus/Minus 2005 | Vans |
|--------------|--------------|---|-------------------------|--------------|----------------------|---------------------------------|---------------------------|--------------------------|-----------------|------|
| 1 | 2 | Coach USA Paramus, N.J. | 2,000 | 1,775 | 225 | 205 | 345 | 1,450 | +553 | 0 |
| 2 | 1 | Greyhound Lines Inc. Dallas | 1,630 | 1,630 | 0 | n/a | 0 | n/a | -336 | 0 |
| 3 | 3 | CUSA LLC Dallas | 1,340 | 1,080 | 260 | n/a | n/a | n/a | +2 | 660 |
| 4 | 5 | Pacific Western Transportation Ltd. Toronto | 639 | 549 | 90 | 144 | 343 | 152 | +106 | 72 |
| 5 | 4 | Academy Bus LLC Hoboken, N.J. | 626 | 626 | 0 | 386 | 34 | 206 | -13 | 9 |
| 6 | 6 | American Coach Lines Lake Worth, Fla. | 558 | 441 | 117 | 114 | 127 | 317 | +28 | 29 |
| 7 | ~ | Greyhound Canada Calgary, Alberta | 389 | 389 | 0 | n/a | n/a | n/a | ~ | 0 |
| 8 | 8 | Holland America Line Inc. Seattle | 354 | 354 | 0 | 238 | 23 | 93 | +17 | 32 |
| 9 | 9 | Peter Pan Bus Lines Inc. Springfield, Mass. | 308 | 288 | 20 | 45 | 22 | 241 | -2 | 15 |
| 10 | 7 | Roberts Hawaii Tours Honolulu | 264 | 190 | 74 | 105 | 74 | 85 | -117 | 87 |

Source: METRO Magazine

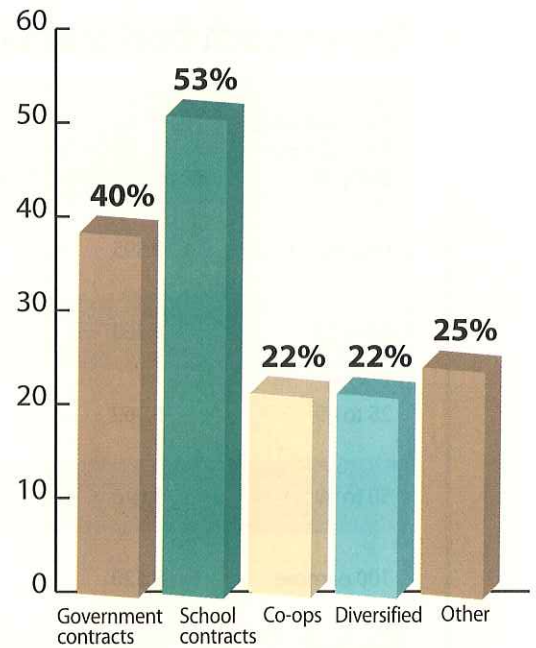
What is your operation's greatest challenge?



Driver recruitment and retention continues to be the greatest challenge for 63% of operators. "Other" challenges included expansion constraints and providing on-time service during peak congestion.

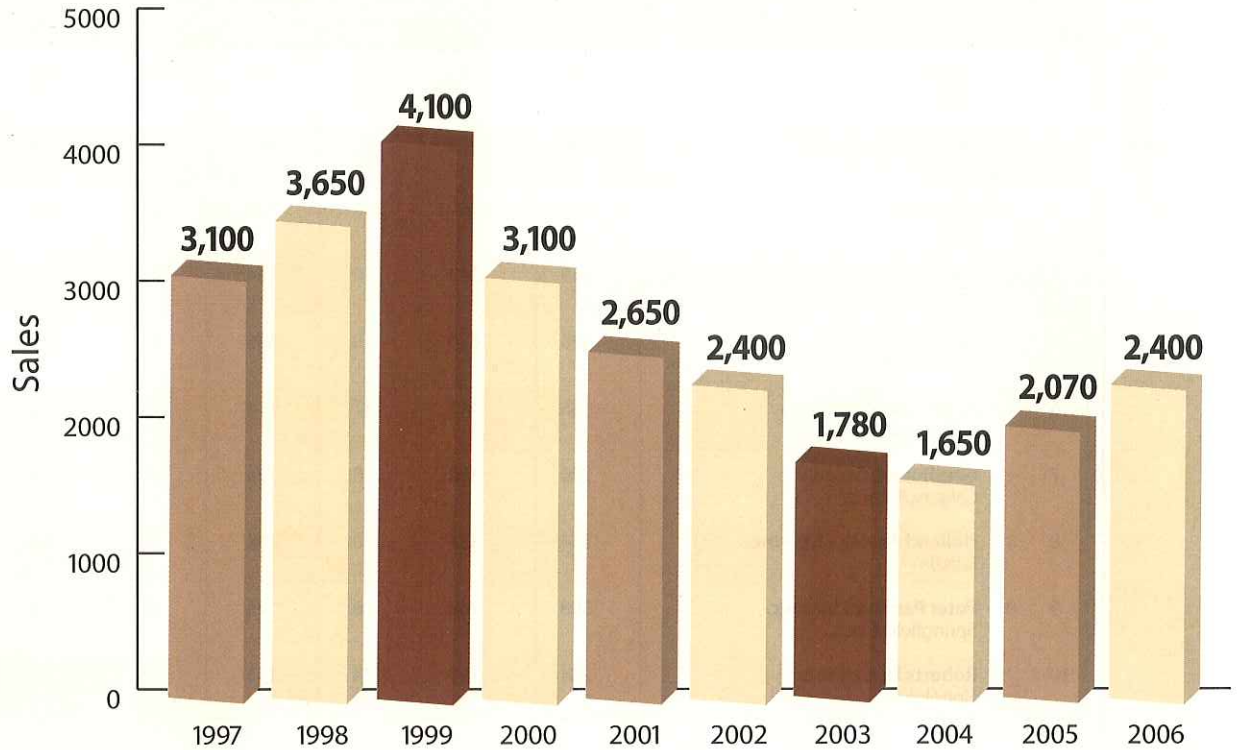
Source: METRO Magazine

What actions have you taken to increase revenue?



More than half of respondents have taken on school contracts as a way to boost business, with 22% diversifying into limo or paratransit service.

Motorcoach sales continue upswing



Motorcoach sales in the U.S. and Canada jumped by 330 units in 2006, an increase of 15.9%.

Source: METRO Magazine

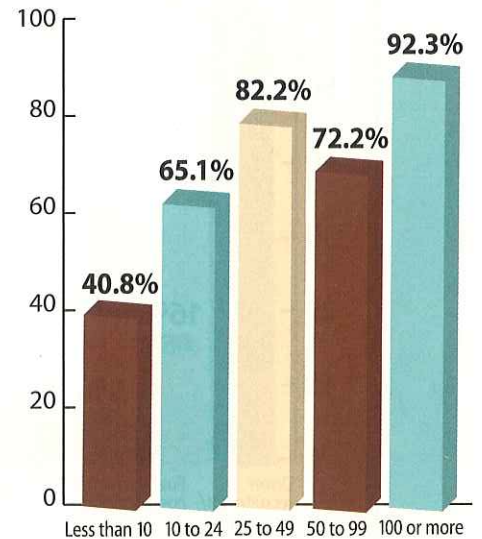
Motorcoach fleet statistics

| Motorcoach fleet size per company | Motorcoaches | Mileage (millions) | Passenger trips (millions) |
|-----------------------------------|---------------|--------------------|----------------------------|
| Less than 10 | 9,595 | 477 | 111 |
| 10 to 24 | 9,768 | 546 | 131 |
| 25 to 49 | 5,169 | 339 | 105 |
| 50 to 99 | 5,016 | 293 | 73 |
| 100 or more | 9,520 | 789 | 211 |
| Totals | 39,068 | 2,444 | 631 |

A recent industry survey indicated that nearly 40,000 coaches were operated in 2004, providing more than 630 million passenger trips.

Source: American Bus Association

Motorcoach operators with non-motorcoach vehicles



In a 2005 study, about half (48.2%) of the respondents reported operating other revenue-generating passenger vehicles in addition to their motorcoaches.

Source: American Bus Association

2007 Bus Rapid Transit Data

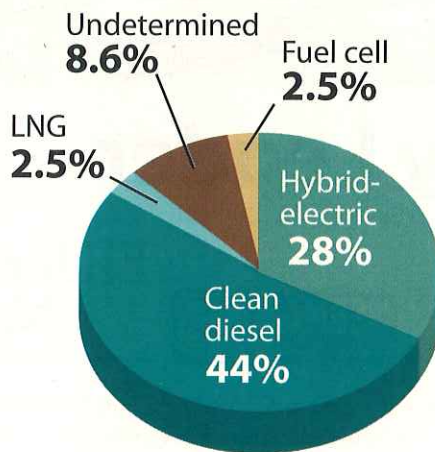
BRT projects in 25 major North American cities

| City | Project | Capital cost | No. of vehicles | Year of start | Propulsion |
|------------------------------|---------------------------------|-----------------|-----------------|---------------|--|
| 1. Albany, N.Y. | NYS BRT | \$16.3 million | 12 | 2008 | Hybrid-electric |
| 2. Atlanta | I-75 Northwest Corridor | \$740 million | 54 | 2015 | Clean diesel |
| 3. Boston | Silver Line Phase 2 | \$601 million | 32 | 2004 | Clean diesel, dual mode trolley |
| 4. Chicago | PARTNER-Pace Suburban Bus | n/a | n/a | 2010 | Clean diesel |
| 5. Cleveland | Euclid Avenue Corridor | \$168 million | 20 | 2008 | Hybrid-electric |
| 6. Eugene, Ore. | Franklin EmX | \$23 million | 5 | 2006 | Hybrid-electric |
| 7. Hartford, Conn. | New Britain-Hartford Busway | \$458 million | 30 | 2012 | Hybrid-electric, clean diesel, fuel cell |
| 8. Indianapolis | DiRecTionS | \$850 million | n/a | 2012 | To be determined |
| 9. Kansas City, Mo. | MAX Main Street BRT | \$21 million | 13 | 2005 | Clean diesel |
| 10. Las Vegas | Metropolitan Area Express (MAX) | \$20.3 million | 10 | 2004 | Hybrid-electric |
| 11. Los Angeles | Metro Orange Line | \$350 million | 30 | 2005 | CNG |
| 12. Mexico City | Metrobus | \$30 million | 90 | 2005 | Clean diesel |
| 13. Miami | South Miami-Dade Busway | \$130 million | 41 | 2007 | CNG |
| 14. Minneapolis | Northwest Corridor | \$20 million | 12 | 2007 | Hybrid-electric |
| 15. Oakland/Berkeley, Calif. | East Bay BRT | \$250 million | 30 | 2010 | Clean diesel |
| 16. Orlando, Fla. | FlexBus | \$3.9 million | 22 | 2009 | To be determined |
| 17. Orange, Calif. | OCTA BRT Program | \$128.5 million | 78 | 2008 | CNG |
| 18. Pittsburgh | West Busway | \$275 million | n/a | 2000 | Clean diesel |
| 19. Provo, Utah | Provo-Orem BRT | \$80 million | 15 | 2011 | Hybrid-electric |
| 20. Reno, Nev. | South Virginia Street Corridor | \$21 million | 10 | 2008 | To be determined |
| 21. San Bernardino, Calif. | SbX | \$163 million | 23 | 2010 | Hybrid-electric |
| 22. San Juan, Puerto Rico | Rio Hondo Corridor | \$65 million | n/a | 2003 | Clean diesel |
| 23. Santa Monica, Calif. | Rapid Blue | \$7 million | 10 | 2005 | LNG |
| 24. Vancouver, B.C. | #98 B-Line | \$52 million | 25 | 2001 | Clean diesel |
| 25. West Covina, Calif. | Silver Streak | \$31.5 million | 30 | 2007 | CNG |

Based on the results of METRO's 2007 BRT 25 survey, data shows wide range of flexibility in types of systems offered.

Source: METRO Magazine

Powering BRT

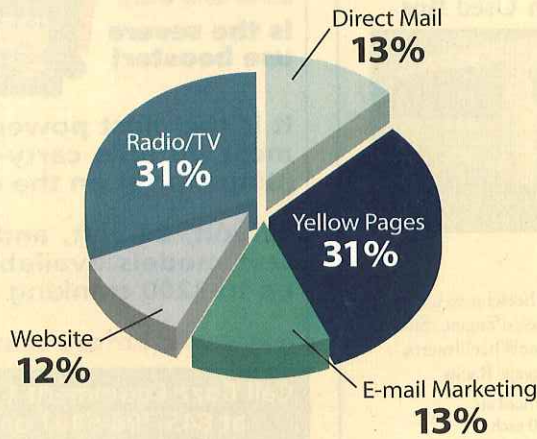


Among all survey respondents, more projects are using or plan to use clean diesel fuel than any other type of propulsion system. Hybrid-electric systems are second-most chosen, with nearly one-third of projects utilizing this technology.

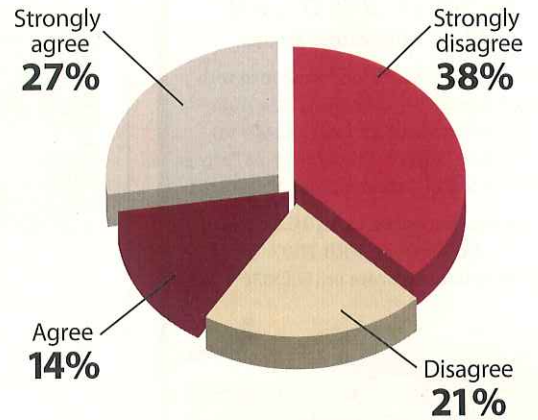
Source: METRO Magazine

Pieces of Pie

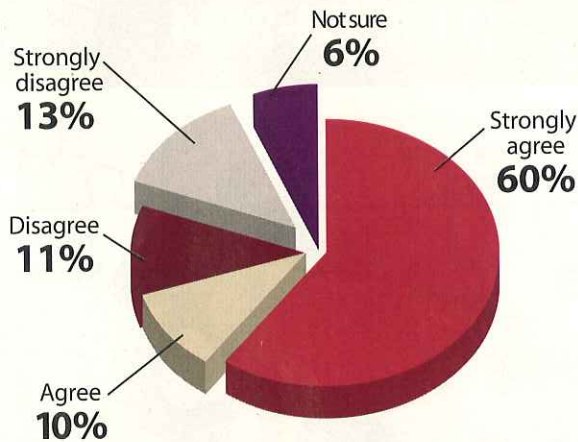
What is your primary method of advertising for your coach operation?



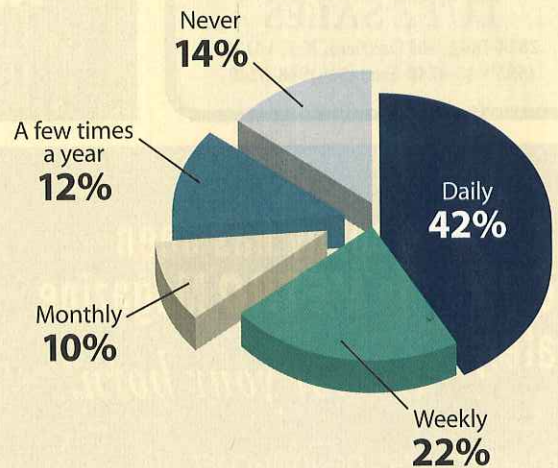
More transit systems should look at privatizing part or all of their fixed-route bus service.



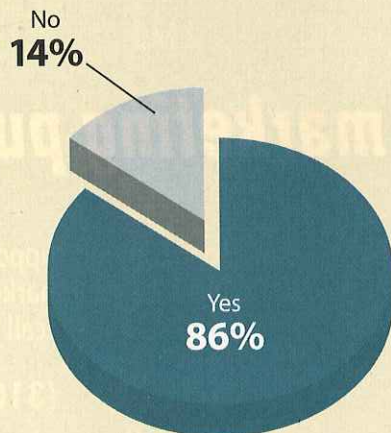
All new motorcoaches should be equipped with seatbelts for passengers.



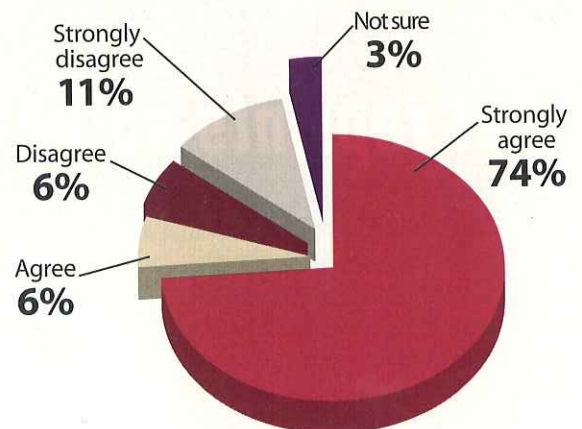
How often do you ride your system?



Do you have a policy prohibiting drivers from using cell phones while operating a bus?



Eliminating fares on public transportation is a feasible idea?



Source: metro-magazine.com