

## MCAA 2010 Industry Survey

### I. GENERAL OPERATIONS

#### 1. How is your business doing today compared to a year ago?

Much worse	2	2%
Worse	17	14%
About the same/flat	36	31%
Better	45	38%
Much Better	18	15%
<b>Total</b>	<b>118</b>	<b>100%</b>

#### 2. What are your Approximate Yearly Sales?

Under \$1,000,000	16	14%
\$1,000,000 - \$5,000,000	56	47%
\$5,000,000 - \$10,000,000	22	19%
\$10,000,000 - \$25,000,000	15	13%
\$25,000,000 - \$50,000,000	4	3%
\$50,000,000 - 100,000,000	2	2%
Over \$100,000,000	3	3%
<b>Total</b>	<b>118</b>	<b>100%</b>

#### 3. How many years has your company been in business?

0 to 5	9	8%
5 to 10	17	14%
10 to 15	19	16%
15 to 20	11	9%
20+	63	53%
<b>Total</b>	<b>119</b>	<b>100%</b>

**4. Is your company a member of the Messenger Courier Association of America (MCAA)?**

Yes	116	100%
No	0	0%
<b>Total</b>	<b>116</b>	<b>100%</b>

**5. Are you a member of a state courier association?**

Yes	46	40%
No, my state doesn't have one	59	51%
No, my state has one but I have not joined	11	9%
<b>Total</b>	<b>116</b>	<b>100%</b>

**6. Is the ability to utilize independent contractors important to your business model?**

Yes	98	84%
No	19	16%
<b>Total</b>	<b>117</b>	<b>100%</b>

**7. Are you politically active on behalf of your business?**

Yes	73	63%
No	43	37%
<b>Total</b>	<b>116</b>	<b>100%</b>

**8. Do you offer national/regional service through a network of agents?**

Yes	67	57%
No	51	43%
<b>Total</b>	<b>118</b>	<b>100%</b>

**9. What kind of couriers do you use?**

Independent Contractors	56	47%
Employees	16	13%
Mix of both	47	39%
<b>Total</b>	<b>119</b>	<b>100%</b>

**10. What is the average number of drivers you employ or contract with on a regular basis?**

0 - 10	9	8%
25 - Oct	20	17%
25 - 75	33	28%
75 - 100	17	14%
100 - 125	9	8%
125 - 150	7	6%
150-200	4	3%
200+	19	16%
<b>Total</b>	<b>118</b>	<b>100%</b>

**11. Is your company a TSA regulated Indirect Air Carrier (IAC) license holder?**

Yes	45	39%
No	70	61%
<b>Total</b>	<b>115</b>	<b>100%</b>

**12. Do you carry (tender?) IAC regulated packages as an IAC agent?**

Yes	79	68%
No	38	32%
<b>Total</b>	<b>117</b>	<b>100%</b>

**13. How are you currently advertising for drivers?**

CourierBoard	34	30%
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Craigslist	71	62%
Other internet job site	27	23%
Newspaper	39	34%
Referral	49	43%
Other, please specify	11	10%

**14. What do you see as the key factors for growing your business over the next 12 months?**

New Service Offerings	53	45%
Revival of the economy	71	60%
Geographic expansion	33	28%
Additional resources into sales	49	42%
Acquisition	32	27%

**15. Over the past 2 years my company's delivery mix has:**

Mostly remained the same	56	47%
Seen an increase in larger freight deliveries	49	42%
Seen a decrease in larger freight deliveries	14	12%

## II. HISTORICAL PAYROLL AND DRIVER COMMISSIONS

**16. What has been the average percentage payout to your independent contractor drivers?**

40 - 50%	12	11%
50 - 60%	67	64%
60 - 70%	21	20%
70%+	5	5%
<b>Total</b>	<b>105</b>	<b>100%</b>

**17. What has been the average starting per hour rate for an employee driver?**

\$7 - 10	16	19%
\$10 - 15	62	73%
\$15 - 20	7	8%
\$20+	0	0%
<b>Total</b>	<b>85</b>	<b>100%</b>

**18. What has been the starting average pay rate for a new dispatcher?**

Under \$25,000	11	10%
\$25,000 - 30,000	40	36%
\$30,000 - 35,000	36	32%
Above \$35,000	25	22%
<b>Total</b>	<b>112</b>	<b>100%</b>

**19. What has been the starting hourly pay for a new CSR?**

Under \$10	9	9%
\$10 - 15	80	77%
\$15 - 20	13	12%
\$20 - 25	0	0%
Above \$25	2	2%
<b>Total</b>	<b>104</b>	<b>100%</b>

**20. What has been the starting hourly compensation for clerical help?**

\$7 - 10	22	20%
\$10 - 15	78	72%
\$15 - 20	7	6%
\$20 - 25	2	2%
\$25+	0	0%
<b>Total</b>	<b>109</b>	<b>100%</b>

**III. TYPES OF EQUIPMENT UTILIZED BY YOUR BUSINESS**

**21. Does your company own or routinely contract the following types of vehicles?**

Cargo Vans	111	95%
Cars	98	84%
Hi-Cubes	51	44%
Straight Trucks	96	82%
Tractor Trailers	27	23%
Pickup Trucks	46	39%
Covered Pickup Trucks	60	51%

**22. What cell carrier do you utilize?**

Sprint Nextel	72	63%
AT&T	32	28%
Verizon	27	24%
T-Mobile	14	12%

**23. What types of communications equipment do you utilize?**

Cell phones	98	84%
Blackberries	49	42%
Palm devices	12	10%
Windows mobile	22	19%
Other, please specify	18	15%

**24. Does this communications equipment do any of the following?**

Scanning	39	37%
Sig Capture	31	29%
Two way communication	93	88%
Mobile data transfer	69	65%
RFID	4	4%
GPS Services	72	68%

**25. Are communications systems intergraded into your business system?**

Yes - real-time	88	75%
Yes - batch	4	3%
No	25	21%
<b>Total</b>	<b>117</b>	<b>100%</b>

**26. What is your total investment in communication equipment?**

under \$10,000	48	42%
\$10-20,000	21	18%
\$20 — 30,000	8	7%
Above \$30,000	38	33%
<b>Total</b>	<b>115</b>	<b>100%</b>

**27. What is your average cost per unit?**

Under \$20	15	14%
\$20-40	21	19%
\$40-60	31	29%
\$60-100	12	11%
Over \$100	29	27%
<b>Total</b>	<b>108</b>	<b>100%</b>

**28. What dispatch software does your company use?**

AirClic	1	1%
Complete Innovations	7	6%
CXT	19	17%
Datatrac	16	14%
Digital Dispatch Systems Inc.	0	0%
e-Courier	5	4%
ESRI	0	0%
Penguin Blue	0	0%
Xcelerator	19	17%
in-house	16	14%
Other, please specify	29	26%
<b>Total</b>	<b>112</b>	<b>100%</b>

**29. Where is your data/server hosted?**

Onsite	73	63%
Offsite	43	37%
<b>Total</b>	<b>116</b>	<b>100%</b>

**30. Do you accept orders over the internet in the following manner?**

Direct internet order entry	94	93%
EDI	37	37%
Capturing from customer websites (ie 3PLs)	24	24%

**31. Does your company own any delivery vehicles?**

Yes	81	68%
No	38	32%
<b>Total</b>	<b>119</b>	<b>100%</b>

**IV. SERVICES**

**32. What types of services does your company offer?**

Courier/Messenger	114	97%
Cross Dock	65	55%
Distribution	90	76%
Expedited Freight	84	71%
Inventory Management	56	47%
Line Haul	51	43%
Next Flight Services	66	56%
On Demand	110	93%
Pick & Pack	49	42%

Route Work	109	92%
Scheduled	105	89%
Warehousing	82	69%
Pool Distribution	23	19%
Last Mile Distribution	57	48%
Record Retention/Archiving	15	13%
Dangerous Goods/ HazMat	25	21%
Distribution - Pharma	50	42%
Distribution - Medical	52	44%
Distribution - Industrial Supplies	39	33%
Distribution - Office supplies	46	39%
Distribution - Other	32	27%
Medical - Blood	70	59%
Medical - Cord Blood	46	39%
Medical - Specimen	78	66%
Medical - Organ Transport	47	40%
Medical - Supplies	74	63%
Medical - Med Surge	43	36%
Home Delivery - White Glove	39	33%
Home Delivery - Tech Assist	25	21%
Home Delivery - Threshold	41	35%

**33. Please indicate the industries you support**

Banking	75	66%
Medical	94	82%
Pharma	74	65%
3PLs	65	57%
Government	50	44%
High-Tech	66	58%
Other, please specify	25	22%

**35. Do you plan on becoming a Cargo security screening agent?**

Yes	21	18%
No	93	82%
Total	114	100%

**36. Do you do work for 3PLs?**

Yes	82	72%
No	32	28%
Total	114	100%

**37. If yes, are your systems integrated with theirs?**

Yes	39	41%
No	56	59%

Total	95	100%
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<b>38. What do you consider the number one benefit of MCAA for your company?</b>		
Networking	43	36%
Education	20	17%
Additional Business	9	8%
Government Compliance Guidance	7	6%
Legislative/Regulatory Lobbying	36	31%
MCAA does not benefit my company	3	3%
<b>Total</b>	<b>118</b>	<b>100%</b>