

# Motorcoach Census

A Study of the Size and Activity of the  
Motorcoach Industry in the United States and Canada in 2014



Prepared for the American Bus Association Foundation  
by John Dunham & Associates  
February 11, 2016

# **Motorcoach Census**

## **A Study of the Size and Activity of the Motorcoach Industry in the United States and Canada in 2014**

**February 11, 2016**

# Contents

<b>Executive Summary</b>	<b>5</b>
Selected Results	6
<b>1. Introduction</b>	<b>7</b>
Definition of the Motorcoach Industry	7
Definition of a Motorcoach	7
Data Sources	7
Disclaimers	8
<b>2. Size and Activity of the Motorcoach Industry in 2014</b>	<b>9</b>
Size of the Motorcoach Industry	9
Passenger Trips	9
Passenger Miles	10
Services Provided	11
Vehicle Mileage	13
Fuel Consumption	13
Employment	13
Student Motorcoach Tourism	14
<b>3. Motorcoach Carrier Characteristics</b>	<b>15</b>
Competition from Transit Agencies	15
Age of Motorcoaches	15
How Motorcoaches Were Acquired	15
How Fuel Was Purchased	16
Founding Year of Carrier	17
Other Revenue-Generating Passenger Vehicles	17
<b>4. Motorcoach Industry Trends</b>	<b>19</b>
<b>Appendix A. Study Methodology</b>	<b>23</b>

## Tables

2-1. Total Carriers and Motorcoaches in 2014 by Fleet Size	9
2-2. Motorcoach Passenger Trips in 2014 by Fleet Size	9
2-3. Motorcoach Passenger Miles in 2014 by Fleet Size	10
2-4. Motorcoach Vehicle Mileage in 2014 by Fleet Size	13
2-5. Motorcoach Fuel Consumption in 2014 by Fleet Size	13
2-6. Motorcoach Carrier Employment in 2014 by Fleet Size	14
2-7. Full- and Part-time Employment in 2014 by Fleet Size	14
3-1. How Carriers Acquired Motorcoaches, Percentage of Carriers	16
3-2. Percentages of Motorcoaches Leased Versus Purchased	16
3-3. How Carriers Purchased Fuel for Motorcoaches, Percentage of Carriers	16
3-4. Percentages of Motorcoach Fuel Gallons Purchased at Retail or Wholesale	17
3-5. Percentages of Motorcoach Carriers by Year Founded	17
4.1. Overview of the Motorcoach Industry, 2011-2013	19
A-1. The Motorcoach Industry by Size of Fleet – U.S. and Canada – 2011-2013	24
A-2. Sample Sizes Realized from Returns to the Survey of Motorcoach Carriers	25

## Figures

2-1. Passenger Trips by Type of Passenger, 2014	10
2-2. Percentage of Carriers Providing Types of Service in 2014	11
2-3. Percentage of Carriers by Number of Services Provided in 2014	11
2-4. Percentage of Motorcoach Service Mileage in 2014 by Type of Service	12
2-5. Motorcoach Service Mileage in 2014 by Type of Service and Fleet Size	12
3-1. Percentage of Carriers that Have Competed with Transit Agencies for Business	15
3-2. Percentage of Reporting Carriers Operating Other Vehicles by Fleet Size, 2014	18
3-3. Percentage of Reporting Carriers Operating Other Vehicles by Type, 2014	18
4-1. Passenger Trips over Three Years	20
4-2. Mileage over Three Years	20
4-3. Fuel Consumed Over Three Years	21
4-4. Passenger Miles per Gallon of Fuel over Three Years	21
4-5. Passenger Trips per Motorcoach over Three Years	22
4-6. Average Passenger Load Over Three Years	22

# Executive Summary

*Motorcoach Census* is a study commissioned by the American Bus Association Foundation (ABAF) to measure the size and activity of the motorcoach transportation service industry in the United States and Canada in 2014. The study provides information on the scope and impact of the motorcoach industry that builds upon earlier census research.

In 2014, the motorcoach industry in the United States and Canada consisted of 3,628 companies that operated 36,520 motorcoaches. In the United States, 3,330 companies operated 32,825 motorcoaches and, in Canada, 298 companies operated 3,695 motorcoaches.

**Passenger Trips** – The motorcoach industry provided 604 million passenger trips in 2014. About 34.8% of these trips were provided by large companies that operated 100 or more motorcoaches, 22.9% by mid-size companies operating 25 to 99 motorcoaches and 42.3% by small companies operating fewer than 25 motorcoaches. The industry moved individual passengers a total of 61.8 billion miles in 2014.

**Services** – Motorcoach companies offer a diverse variety of services. About 96% of motorcoach companies provided charter service in 2014, 40% provided tour service, 20% provided sightseeing, 24% provided airport shuttle, 16% provided scheduled service, 13% provided special operations, and 8% provided commuter services. Charter service accounted for about 47.5% of motorcoach service mileage, followed by scheduled service (32.3%), commuter (4.6%), packaged tour (6.6%), airport service (3.7%), sightseeing (3.5%), and special operations (1.8%).

**Companies** – The majority (94%) of companies were small, and operated fewer than 25 motorcoaches. All told, these firms operated 19,066 motorcoaches, provided 255.2 million passenger trips, and accounted for 46% of motorcoach mileage. Mid-sized companies, those that operated 25 to 99 motorcoaches, ran 8,655 motorcoaches, provided 138.5 million passenger trips, and accounted for 24% of the industry’s motorcoach mileage. Large companies that operated over 100 motorcoaches accounted for 24% of the industry’s fleet, provided 35% of the industry’s passenger trips, and 31% of the industry’s motorcoach mileage.

**Employment** – The motorcoach industry provided jobs to 128,300 people in 2014; 71,900 full-time and 56,400 part-time. On average, a motorcoach company provided 35.4 jobs or 3.5 jobs per motorcoach. Small companies – those that operated fewer than 25 motorcoaches – provided for 60% of motorcoach industry jobs. Mid-sized companies – those that operated between 25 and 99 motorcoaches – provided for 18% of motorcoach industry jobs. Large companies – those that operated more than 100 motorcoaches – provided for 22% of motorcoach industry jobs.<sup>1</sup>

**Fuel Efficiency** – Considering the amount of passengers served per bus, motorcoaches move people with remarkable fuel efficiency. In 2014, the average fuel efficiency of a motorcoach was 6.1 miles per gallon of fuel. With this fuel efficiency, a motorcoach carrying the industry average of 35.3 passengers achieved 199.4 passenger miles per gallon of fuel in 2014.

**Motorcoach Use** – On average, a motorcoach provided 16,500 passenger trips in 2014, provided 1.7 million passenger miles, employed 3.5 people, used 8,500 gallons of fuel, and traveled 51,700 miles. About 57.6% of the

---

<sup>1</sup> This figure may differ from that provided by the “American Bus Association Foundation Economic Impact of the Motorcoach Tour and Travel Industry” due to differences in the types of service modeled in the two analyses. See: “The American Bus Association Economic Impact Study,” John Dunham & Associates, 2014. Available at: <http://www.buses.org/ABA-Foundation/Research/Economic-Impact>

average coach's service mileage was for charter, tour, and sightseeing services and 42.4% was for fixed-route services (airport shuttle, commuter, scheduled, and special operations).

The study reveals the scope and impact of the motorcoach transportation industry in the United States and Canada. It shows an industry that serves a broad range of customers, from students to seniors, and that moves people with great fuel efficiency. It shows an industry that provides charter, tour, and sightseeing services, which are of vital importance to the travel and leisure industries, and intercity and commuter services, which are essential components of the passenger transportation systems in both the United States and Canada.

### Selected Results of *Motorcoach Census*

**1. Size of the Motorcoach Industry in the United States and Canada in 2014**

*United States:*

Motorcoach carriers.....	3,330
Motorcoaches.....	32,825

*Canada:*

Motorcoach carriers.....	298
Motorcoaches.....	3,695

*Total:*

Motorcoach carriers.....	3,628
Motorcoaches.....	36,520

**2. Motorcoach Industry Activity in the United States and Canada in 2014**

Passenger trips.....	603.9 million
Passenger miles.....	61.8 billion
Miles traveled.....	1.89 billion
Service miles (miles with passengers).....	1.75 billion
Fuel consumed (gallons).....	310.1 million
Employment.....	128,300

**3. Motorcoach Operating Ratios for 2014**

Passenger trips per motorcoach.....	16,500
Passenger miles per motorcoach.....	1.7 million
Miles traveled per motorcoach.....	51,700
Service miles traveled per motorcoach.....	47,900
Passengers per service mile.....	35.3
Miles per gallon of fuel.....	6.1
Passenger miles per gallon of fuel.....	199.4
Employment per motorcoach.....	3.5

**4. Demographics of Motorcoach Passenger Trips**

Students.....	22.0%
Senior.....	26.6%
All other.....	51.3%

# 1. Introduction

*Motorcoach Census 2015* is a study commissioned by the American Bus Association Foundation to measure the size and activity of the motorcoach transportation service industry in the United States and Canada in calendar year 2014. Industry size is measured by the number of motorcoach carriers and the number of motorcoaches they operated. Activity is measured by the number of passenger trips provided, passenger miles, services provided, motorcoach miles traveled, fuel consumed, and employment.

## Definition of the Motorcoach Industry

The industry consists of private-sector organizations that lease/own and operate motorcoaches and offer motorcoach transportation services to the public, including to private and public sector organizations on a contract basis. The industry includes motorcoach transportation companies that are hired on a contract basis by state or city transit authorities to transport commuters. The industry excludes governments, transit agencies or other public-sector organizations that lease/own and operate motorcoaches and offer transportation services to the public. The industry also excludes private- and public-sector organizations that lease/own and operate motorcoaches for their own use, such as businesses that operate motorcoaches to shuttle their employees.

## Definition of a Motorcoach

For this study, a motorcoach, or over-the-road bus (OTRB), is defined as a vehicle designed for long-distance transportation of passengers, characterized by integral construction with an elevated passenger deck located over a baggage compartment. It is at least 35 feet in length with a capacity of more than 30 passengers. This definition closely matches the definition of an OTRB written into U.S. law, namely “a bus characterized by an elevated passenger deck located over a baggage compartment” (Section 3038 of Public Law 105-178, 49 USC 5310 note). This definition of a motorcoach excludes the typical city transit bus and city sightseeing buses, such as double-decker buses and trolleys.

## Data Sources

Several sources of information were used to construct the estimates of industry size and activity in this study. Names of potential motorcoach carriers were assembled using information from prior censuses, the American Bus Association Foundation, Dun & Bradstreet Inc., the U.S. Department of Transportation, and the United Motorcoach Association. Information about the potential motorcoach carriers and the motorcoaches they operated was collected through a survey. The survey questionnaire was distributed to the potential motorcoach carriers. A total of 381 usable survey responses from motorcoach carriers were returned to John Dunham & Associates.

John Dunham & Associates research efforts were supported by a number of industry groups, companies, and organizations, including the United Motorcoach Association, Motor Coach Canada, Trailways Transportation System, International Motorcoach Group, Ontario Motor Coach Association, the Quebec Bus Owners Association, ABC Companies, Motor Coach Industries, and Prevost Car. We acknowledge and thank them for their support. We are particularly grateful to the 381 motorcoach carriers that took the time to provide information about their firms on a confidential basis; their assistance was crucial to the completion of this study.

This report presents industry estimates of size and activity in Chapter 2 and other statistics on motorcoach carrier characteristics in Chapter 3 for the motorcoach transportation services industry in the United States and Canada in 2014. Appendix A describes the study methodology.

## **Disclaimers**

This analysis was prepared by John Dunham & Associates based on individual company responses to a survey. Our role was to aggregate the data in order to present an overview of the motorcoach industry in the United States and Canada while maintaining the confidentiality of the individual respondent's information. All estimates are based solely on those provided to us by the companies.

Any errors in the aggregation and presentation are our own.



## 2. Size and Activity of the Motorcoach Industry in 2014

*Motorcoach Census* reports estimates of the size and activity of the motorcoach transportation services industry in the United States and Canada in calendar year 2014. Industry size is measured by the number of motorcoach carriers and the number of motorcoaches they operated. Activity is measured by the number of passenger trips provided, passenger miles, services provided, motorcoach miles traveled, fuel consumed, and employment.

### Size of the Motorcoach Industry

In 2014, the motorcoach industry in the United States and Canada consisted of 3,628 carriers and 36,520 motorcoaches (Table 2-1). In the United States, 3,330 carriers operated 32,825 motorcoaches and, in Canada, 298 carriers operated 3,695 motorcoaches. The average carrier operated 10.1 motorcoaches.

**Table 2-1**  
*Total Carriers and Motorcoaches in 2014 by Fleet Size*

Motorcoach Fleet Size	Carriers		Motorcoaches		Average Number of Motorcoaches	Motorcoaches by Capacity (Passengers)		
	Number	Percent	Number	Percent		30 to 46	47 to 57	Over 58
100 or more	23	0.6%	8,799	24.1%	382.6	244	7,891	664
50 to 99	50	1.4%	3,278	9.0%	65.6	284	2,936	57
25 to 49	155	4.3%	5,378	14.7%	34.7	564	4,521	293
10 to 24	439	12.1%	6,724	18.4%	15.3	739	5,693	291
1 to 9	2,961	81.6%	12,342	33.8%	4.2	1,820	10,234	289
<b>Industry Total</b>	<b>3,628</b>	<b>100.0%</b>	<b>36,520</b>	<b>100.0%</b>	<b>10.1</b>	<b>3,652</b>	<b>31,274</b>	<b>1,594</b>

Note: Percentages may not sum to 100% because of rounding.

### Passenger Trips

The motorcoach industry in the United States and Canada provided 604 million passenger trips in 2014 (Table 2-2). The average carrier provided 166,500 passenger trips and an average motorcoach provided 16,500 passenger trips.

**Table 2-2**  
*Motorcoach Passenger Trips in 2014 by Fleet Size*

Motorcoach Fleet Size	Passenger Trips		Average Passenger Trips per:	
	Total	Percent	Motorcoach	Carrier
100 or more	210,249,600	34.8%	23,900	9,141,300
50 to 99	50,116,300	8.3%	15,300	1,002,300
25 to 49	88,391,200	14.6%	16,400	570,300
10 to 24	95,087,100	15.7%	14,100	216,600
1 to 9	160,073,800	26.5%	13,000	54,100
<b>Industry Total</b>	<b>603,918,000</b>	<b>100.0%</b>	<b>16,500</b>	<b>166,500</b>

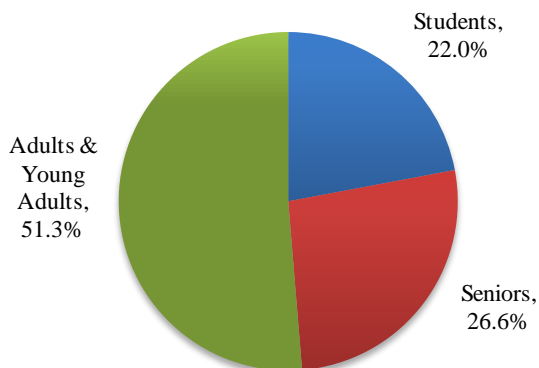
Note: Percentages may not sum to 100% because of rounding.

The largest carriers (100 or more motorcoaches) provided 210 million passenger trips and accounted for 34.8% of passenger trips in 2014, which, on average, amounts to 9.1 million passenger trips per carrier. Motorcoaches operated by large carriers provided an average of 23,900 passenger trips per motorcoach in 2014.

Small carriers with fewer than 25 motorcoaches provided 42.3% of industry passenger trips, which is, on average, 75,000 passenger trips per carrier and 13,400 passenger trips per motorcoach.

The motorcoach industry serves a wide and diverse customer base and is especially vital for students and senior citizens (people 55 years or older). Students and seniors accounted for 48.7% of the passenger trips provided by the motorcoach industry in 2014.<sup>2</sup>

**Figure 2-1**  
*Passenger Trips by Type of Passenger, 2014*



Note: Percentages may not sum to 100% because of rounding.

## Passenger Miles

A passenger mile is defined as one person transported one mile. The motorcoach industry in the United States and Canada provided 61.8 billion passenger miles in 2014 (Table 2-3). On average, each carrier generated 17.0 million passenger miles and each motorcoach generated 1.7 million passenger miles.

**Table 2-3**  
*Motorcoach Passenger Miles in 2014 by Fleet Size*

Motorcoach Fleet Size	Passengers Miles		Average Passenger Miles per:	
	Number	Percent	Motorcoach	Carrier
100 or more	19,278,131,000	31.2%	2,191,000	838,180,000
50 to 99	6,096,157,000	9.9%	1,860,000	121,923,000
25 to 49	8,287,168,000	13.4%	1,541,000	53,466,000
10 to 24	10,382,014,000	16.8%	1,544,000	23,649,000
1 to 9	17,785,348,000	28.8%	1,441,000	6,007,000
<b>Industry Total</b>	<b>61,828,818,000</b>	<b>100.0%</b>	<b>1,693,000</b>	<b>17,042,000</b>

Note: Percentages may not sum to 100% because of rounding.

The largest carriers (100 or more motorcoaches) accounted for about 31.2% of industry passenger miles. On average, a large carrier accounted for 838.2 million passenger miles, or 2.2 million passenger miles per motorcoach; the largest of any fleet-size category.

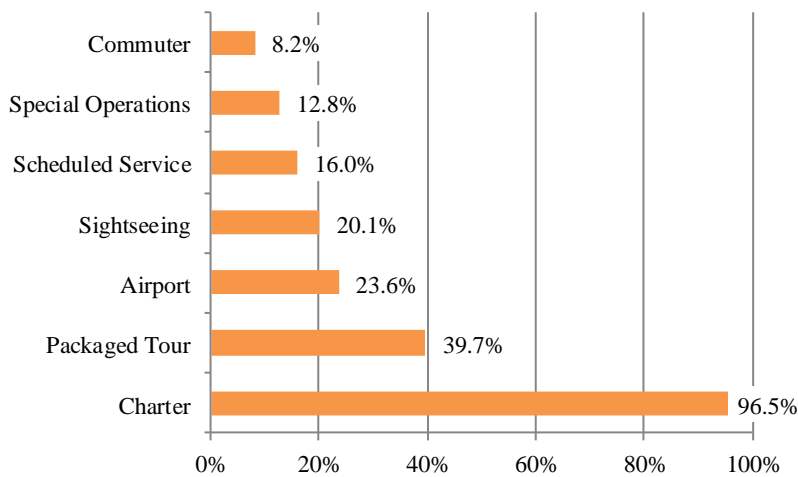
<sup>2</sup> Students are defined as those 18 years of age and younger. Young adults are defined as those of 19 to 30 years of age. Adults are defined as those of 31 to 54 years of age.

The smallest carriers, those with a fleet size of fewer than 25 motorcoaches, operated the smallest average number (1.5 million) of passenger miles per motorcoach. They averaged 8.3 million passenger miles per carrier for a total of 28.2 billion passenger miles, or 45.6% of industry passenger miles.

## Services Provided

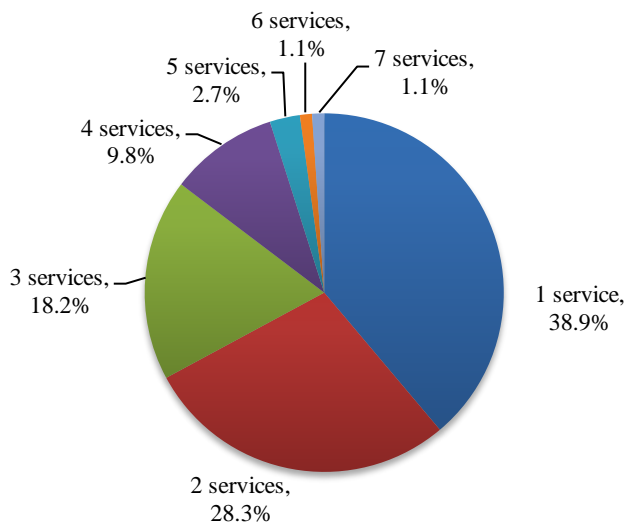
The services offered by the motorcoach industry are diverse. Many carriers offered multiple types of service. Nearly all carriers (96.5%) provided charter service in 2014, followed by tour (39.7%), airport shuttle (23.6%), scheduled service (16.0%), sightseeing (20.1%), special operations (12.8%), and commuter service (8.2%).

**Figure 2-2**  
*Percentage of Carriers Providing Types of Service in 2014*



In 2014, 61.1% of carriers provided more than one service. Approximately (38.9%) carriers had mileage in 2014 for just one service, 28.3% offered two services, 18.2% offered three services, 9.8% offered four services, 2.7% offered five services, 1.1% offered six services, and 1.1% offered all seven services.

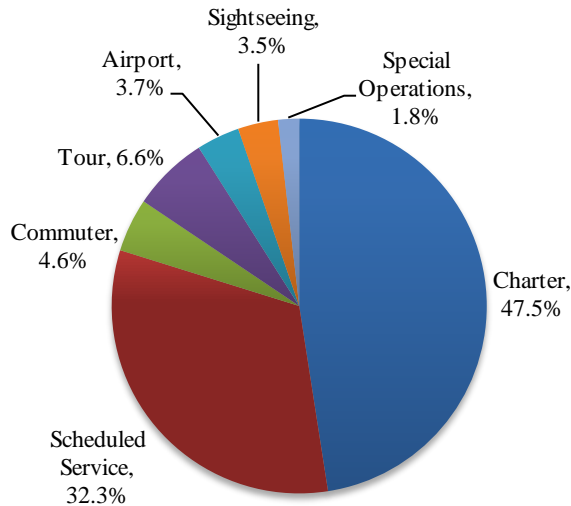
**Figure 2-3**  
*Percentage of Carriers by Number of Services Provided in 2014*



Note: Percentages may not sum to 100% because of rounding.

Of the service miles driven by motorcoach companies in 2014, 79.8% were dedicated to charter and scheduled services. Charter service accounted for 47.5% of the service miles traveled and scheduled route service accounted for 32.3%, followed by commuter (4.6%), packaged tour (6.6%), airport service (3.7%), sightseeing (3.5%), and special operations (1.8%).

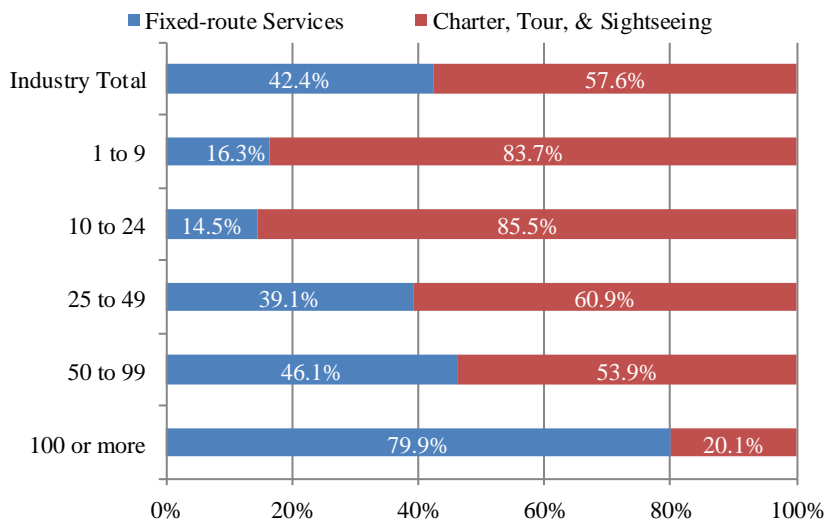
**Figure 2-4**  
*Percentage of Motorcoach Service Mileage in 2014 by Type of Service*



Note: Percentages may not sum to 100% because of rounding.

About 57.6% of motorcoach service mileage was accounted for by charter, tour, and sightseeing services, and 42.4% of mileage was accounted for by fixed-route services (airport shuttle, commuter, scheduled, and special operations). Fixed-route services' share of motorcoach service mileage increases with fleet-size category, accounting for only 16.3% of mileage for the smallest carriers to 79.9% for the largest carriers.

**Figure 2-5**  
*Motorcoach Service Mileage in 2014 by Type of Service and Fleet Size*



## Vehicle Mileage

Industry motorcoaches traveled 1.89 billion miles in 2014, averaging 520,400 miles per carrier and 51,700 miles per motorcoach. The largest carriers with over 100 motorcoaches averaged 65,900 miles per motorcoach, while the smallest carriers – those with fewer than 10 motorcoaches – averaged 43,600 miles per motorcoach. Service mileage (miles traveled with passengers) accounted for 1.75 billion (92.7%) of the 1.89 billion total miles that motorcoach vehicles traveled in 2014.

**Table 2-4**  
*Motorcoach Vehicle Mileage in 2014 by Fleet Size*

Motorcoach Fleet Size	Vehicle Mileage		Average Vehicle Mileage per:	
	Number	Percent	Motorcoach	Carrier
100 or more	579,928,600	30.7%	65,900	25,214,300
50 to 99	174,840,300	9.3%	53,300	3,496,800
25 to 49	274,092,400	14.5%	51,000	1,768,300
10 to 24	321,603,600	17.0%	47,800	732,600
1 to 9	537,713,100	28.5%	43,600	181,600
<b>Industry Total</b>	<b>1,888,178,000</b>	<b>100.0%</b>	<b>51,700</b>	<b>520,400</b>

Note: Percentages may not sum to 100% because of rounding.

## Fuel Consumption

Industry motorcoaches consumed 310.1 million gallons of fuel in 2014. Each carrier, on average, consumed 85,500 gallons of fuel, or 8,500 gallons per motorcoach. Motorcoach fuel efficiency averaged 6.1 miles per gallon. With this fuel efficiency, a motorcoach carrying the industry average of 35.3 passengers achieved 199.4 passenger miles per gallon in 2014.

**Table 2-5**  
*Motorcoach Fuel Consumption in 2014 by Fleet Size*

Motorcoach Fleet Size	Gallons of Fuel Consumed		Average Gallons of Fuel Consumed Per:		Miles Per Gallon
	Gallons	Percent	Motorcoach	Carrier	
100 or more	96,383,500	31.1%	11,000	4,190,600	6.0
50-99	32,183,000	10.4%	9,800	643,700	5.4
25 to 49	45,502,200	14.7%	8,500	293,600	6.0
10 to 24	55,443,200	17.9%	8,200	126,300	5.8
1 to 9	80,567,700	26.0%	6,500	27,200	6.7
<b>Industry Total</b>	<b>310,079,600</b>	<b>100.0%</b>	<b>8,500</b>	<b>85,500</b>	<b>6.1</b>

Note: Percentages may not sum to 100% because of rounding.

## Employment

The motorcoach industry in the United States and Canada employed 128,300 people in 2014, averaging 35 employees per carrier and 3.5 employees per motorcoach (Table 2-6). The largest carriers with over 100

motorcoaches averaged 1,217 employees per carrier and 3.2 employees per motorcoach, while the smallest carriers with fewer than 10 motorcoaches averaged 19 employees per company and 4.6 employees per motorcoach.<sup>3</sup>

**Table 2-6**  
*Motorcoach Carrier Employment in 2014 by Fleet Size*

Motorcoach Fleet Size	Employment		Average Employment per:	
	Total	Percent	Motorcoach	Carrier
100 or more	28,000	21.8%	3.2	1,217
50 to 99	8,600	6.7%	2.6	172
25 to 49	14,600	11.4%	2.7	94
10 to 24	20,400	15.9%	3.0	46
1 to 9	56,700	44.2%	4.6	19
<b>Industry Total</b>	<b>128,300</b>	<b>100.0%</b>	<b>3.5</b>	<b>35</b>

Note: Percentages may not sum to 100% because of rounding.

Of the 128,300 people employed by the motorcoach industry in 2014, 71,900 (56.0%) were full-time and 56,400 (44.0%) were part-time (Table 2-7). On a percentage basis, the largest carriers (100 or more motorcoaches) employed more people on a full-time basis (86.8%) than the smallest carriers with fewer than 10 motorcoaches (44.1%).

**Table 2-7**  
*Full- and Part-time Employment in 2014 by Fleet Size*

Motorcoach Fleet Size	Full-time Employees	Part-Time Employees	Percent Full-time	Percent Part-time
100 or more	24,300	3,700	86.8%	13.2%
50 to 99	4,900	3,700	57.0%	43.0%
25 to 49	8,900	5,700	61.0%	39.0%
10 to 24	8,800	11,600	43.1%	56.9%
1 to 9	25,000	31,700	44.1%	55.9%
<b>Industry Total</b>	<b>71,900</b>	<b>56,400</b>	<b>56.0%</b>	<b>44.0%</b>

Note: Percentages may not sum to 100% because of rounding.

## Student Motorcoach Tourism

The motorcoach industry provided 92.2 million tourism passenger trips to students in 2014. Students accounted for 24.4% of all tourism passenger trips.<sup>4</sup> The motorcoach industry served student passengers at a price point which allows students in the United States and Canada to visit important historical and cultural sites that might have been out of reach without an affordable and reliable transportation option. In fact, a student in the United States and Canada took, on average, about 1.6 motorcoach tourism passenger trips in 2014.<sup>5</sup>

<sup>3</sup> This figure may differ from that provided by the “American Bus Association Foundation Economic Impact of the Motorcoach Tour and Travel Industry” due to differences in the types of service modeled in the two analyses.

See: “The American Bus Association Economic Impact Study,” John Dunham & Associates, 2014. Available at: <http://www.buses.org/ABA-Foundation/Research/Economic-Impact>

<sup>4</sup> Passenger trips estimate includes charter, tour, and sightseeing operations. Students are defined as 18 years of age and under. Student shares of tourism passenger trips (24.4 percent) are higher than student shares of passenger trips by type (23.4 percent) because the latter also includes fixed route services.

<sup>5</sup> Ibid.

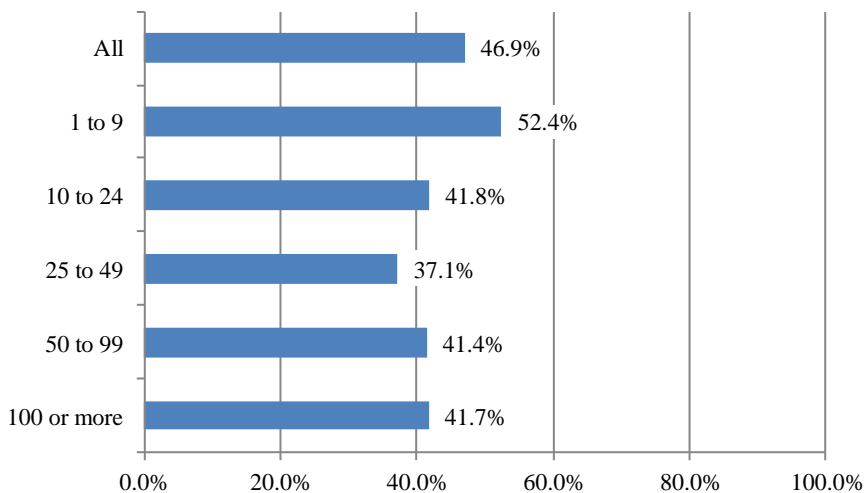
# 3. Motorcoach Carrier Characteristics

The *Motorcoach Census* survey of motorcoach carriers in the United States and Canada collected additional information on the operating characteristics of the carriers. This chapter presents summary statistics on this information. Included are industry estimates relating to competition from transit agencies, the average age of motorcoaches, and on how carriers acquired motorcoaches and fuel. Finally, summary statistics are presented on the data reported by carriers about their founding year and their other revenue-generating vehicles.

## Competition from Transit Agencies

In 2014, 46.9% of motorcoach carriers in the United States experienced competition from transit agencies. Of the largest carriers (100 or more motorcoaches), 41.7% encountered competition from transit agencies in 2014. Of the smallest carriers, 52.4% competed with transit agencies for business. More than two in five motorcoaches (44.6%) were operated by carriers that experienced competition from transit agencies in 2014.

**Figure 3-1**  
*Percentage of Carriers that Have Competed with Transit Agencies for Business*



## Age of Motorcoaches

In 2014, the average manufacture year of motorcoaches operated by carriers in the United States and Canada was 2005, and the median manufacture year was also 2005. The average motorcoach operated by the smallest carriers, those with fewer than 10 motorcoaches, was manufactured in 2002. The average motorcoach for carriers with between 10 and 24 motorcoaches was manufactured in 2006 and the average motorcoach operated by carriers with between 25 and 49 motorcoaches was manufactured in 2006. The average motorcoach for companies with between 50 and 99 motorcoaches was manufactured in 2006 and the average motorcoach for companies with over 100 motorcoaches was manufactured in 2007.

## How Motorcoaches Were Acquired

In 2014, 2.9% of motorcoach carriers operated only leased motorcoaches in their fleet, while 76.6% only operated purchased motorcoaches, and 20.5% operated a mix of both (Table 3-1).

**Table 3-1**  
*How Carriers Acquired Motorcoaches, Percentage of Carriers*

Motorcoach Fleet Size	Leased Only	Purchased Only	Both
100 or more	0.0%	57.1%	42.9%
50 to 99	6.9%	55.2%	37.9%
25 to 49	2.8%	69.4%	27.8%
10 to 24	1.1%	71.0%	28.0%
1 to 9	3.4%	84.8%	11.8%
<b>Industry Total</b>	<b>2.9%</b>	<b>76.6%</b>	<b>20.5%</b>

Note: Percentages may not sum to 100% because of rounding.

Survey results indicate that 90.4% of the motorcoaches in the industry were purchased (Table 3-2). Large companies with over 100 motorcoaches owned 92.4% of their vehicles, while small companies with fewer than 10 motorcoaches owned 91.8% of their vehicles.

**Table 3-2**  
*Percentages of Motorcoaches Leased Versus Purchased*

Motorcoach Fleet Size	Leased	Purchased
100 or more	7.6%	92.4%
50 to 99	14.0%	86.0%
25 to 49	11.3%	88.7%
10 to 24	11.2%	88.8%
1 to 9	8.2%	91.8%
<b>Industry Total</b>	<b>9.6%</b>	<b>90.4%</b>

## How Fuel Was Purchased

Of respondents to the survey, 55.2% of carriers in the United States and Canada purchased fuel for their motorcoaches only at retail in 2014, while very few (7.1%) bought only at wholesale, and 37.6% purchased fuel both at retail and at wholesale (Table 3-3). On a percentage basis, more small carriers purchased fuel only at retail than larger carriers. Of the smallest carriers with fewer than 10 motorcoaches, 79.1% purchased fuel only at retail versus 25.0% for the 50 to 99 motorcoach fleet-size category. Of the carriers with over 100 motorcoaches that responded to the survey, 64.3% reported purchasing fuel both at retail and at wholesale.

**Table 3-3**  
*How Carriers Purchased Fuel for Motorcoaches, Percentage of Carriers*

Motorcoach Fleet Size	Retail Only	Wholesale Only	Both
100 or more	21.4%	14.3%	64.3%
50 to 99	25.0%	3.6%	71.4%
25 to 49	8.8%	17.6%	73.5%
10 to 24	35.9%	5.4%	58.7%
1 to 9	79.1%	6.1%	14.8%
<b>Industry Total</b>	<b>55.2%</b>	<b>7.1%</b>	<b>37.6%</b>

Note: Percentages may not sum to 100% because of rounding.



Even though 55.2% of motorcoach carriers reported buying fuel only at retail, 47.2% of motorcoach fuel was actually purchased at wholesale in 2014 (Table 3-4). This was due to the fact that carriers with over 25 motorcoaches reported buying much more fuel at wholesale than at retail. The smallest carriers with fewer than 10 motorcoaches purchased the smallest percentage of fuel (15.9%) at wholesale, and the largest carriers with over 100 motorcoaches purchased 55.4% of fuel at wholesale.

**Table 3-4**  
*Percentages of Motorcoach Fuel Gallons Purchased at Retail or Wholesale*

<b>Motorcoach Fleet Size</b>	<b>Retail Gallons</b>	<b>Wholesale Gallons</b>
100 or more	44.6%	55.4%
50-99	40.2%	59.8%
25-49	29.6%	70.4%
10-24	47.7%	52.3%
Fewer than 10	84.1%	15.9%
<b>Industry Total</b>	<b>52.8%</b>	<b>47.2%</b>

## Founding Year of Carrier

The motorcoach industry in the United States and Canada is made up of a mix of old and new companies. About 3.2% of reporting carriers were founded before 1920 and 9.3% of carriers were founded before 1940. More than half of all carriers (52.4%) were founded in or after 1990 and three in every ten (30.9%) carriers were founded in or after 2000. The average founding year of reporting carriers is 1983 and the median founding year of reporting carriers is 1991. By decade, most carriers were founded in between 2000 and 2009 (24.7%), closely followed by the 1990s (21.5%) and the 1980s (16.0%).

**Table 3-5**  
*Percentages of Motorcoach Carriers by Year Founded*

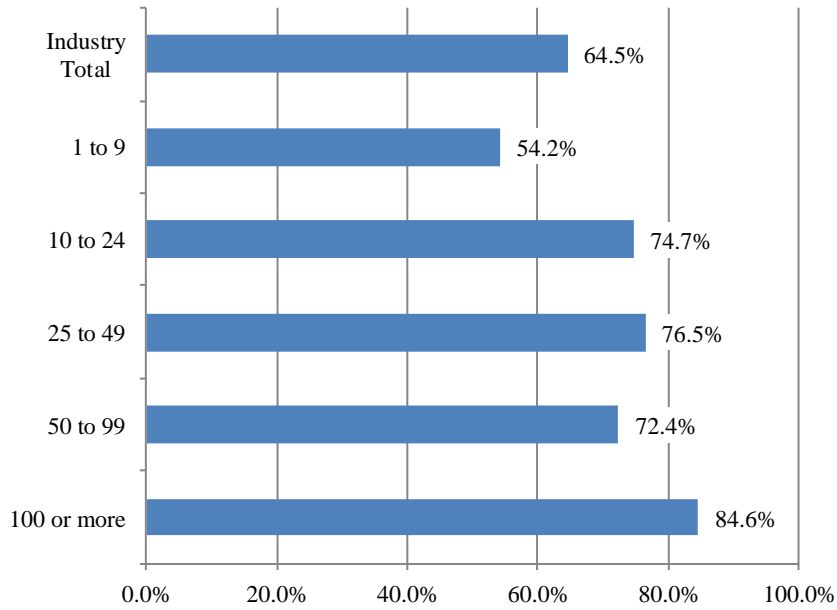
<b>Year Founded</b>	<b>Percent of Carriers</b>
Pre-1920	3.2%
1920-1939	6.1%
1940-1959	9.0%
1960-1979	13.3%
1980s	16.0%
1990s	21.5%
2000-Present	30.9%

Note: Percentages may not sum to 100% because of rounding.

## Other Revenue-Generating Passenger Vehicles

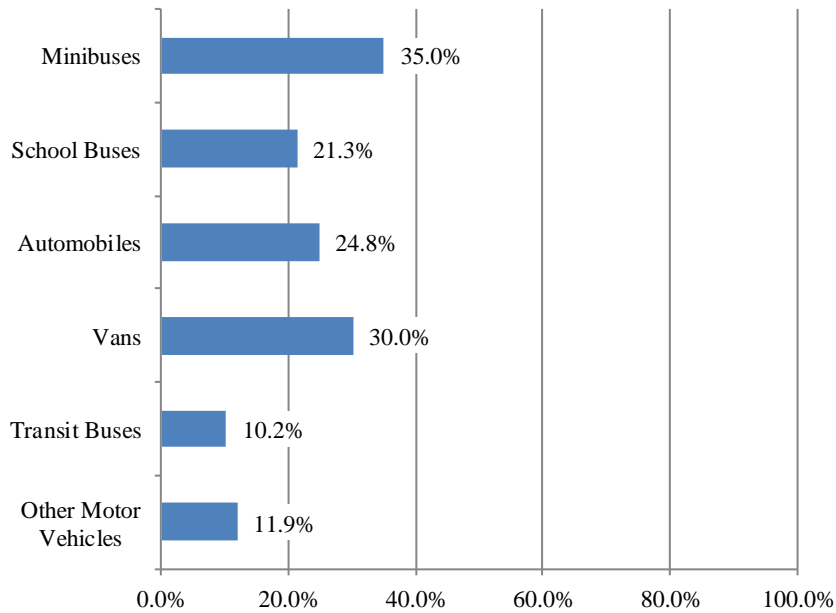
Of the survey respondents, 64.5% of the carriers reported operating other revenue-generating passenger vehicles in addition to their motorcoaches. Of the survey respondents operating 100 or more motorcoaches, 84.6% operated other passenger vehicles, while 54.2% of the smallest fleet-size category respondents – carriers operating fewer than 10 motorcoaches – reported operating other vehicles.

**Figure 3-2**  
*Percentage of Reporting Carriers Operating Other Vehicles by Fleet Size, 2014*



Of all reporting motorcoach companies, 35.0% also operated mini-buses, while 21.3% operated school buses, 10.2% operated transit buses, 30.0% operated vans, 24.8% operated automobiles, and 11.9% operated other motor vehicles.

**Figure 3-3**  
*Percentage of Reporting Carriers Operating Other Vehicles by Type, 2014*



## 4. Motorcoach Industry Trends

A comparison of the Motorcoach Censuses conducted over the past three years reveals an industry that experienced some decline in total companies, passenger trips, mileage, and fuel consumed.

In the United States and Canada, total companies declined from 3,801 to 3,628, due to mergers, companies going out of business, and companies discontinuing motorcoach service. From 2013 to 2014, passenger trips declined by 0.2%, fuel consumed increased by 2.1%, and miles traveled increased by 1.5%.

The demographics of passengers changed slightly over the three years. Seniors decreased as a percentage of ridership from 28.3% in 2013 to 26.6% in 2014, and students increased as a percentage of ridership, from 21.0% in 2013 to 22.0% in 2014.

**Table 4-1**

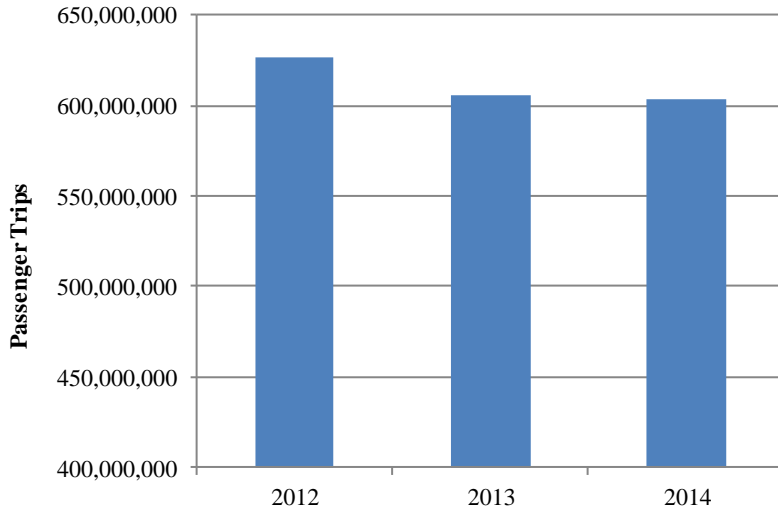
*Overview of the Motorcoach Industry, 2012-2014*

	2012	2013	% change	2014	% change
<b>Overview</b>					
US Carriers	3,648	3,471	-4.9%	3,330	-4.1%
US Motorcoaches	36,017	32,811	-8.9%	32,825	0.0%
Canada Carriers	336	330	-1.8%	298	-9.7%
Canada Motorcoaches	4,124	4,092	-0.8%	3,695	-9.7%
Total Carriers	3,954	3,801	-4.6%	3,628	-4.6%
Total Motorcoaches	40,141	36,903	-8.1%	36,520	-1.0%
<b>Industry Activity</b>					
Passenger Trips	626,988,900	605,084,000	-3.5%	603,918,000	-0.2%
Passenger Miles	76,165,113,600	63,092,552,000	-17.2%	61,828,818,000	-2.0%
Miles Traveled	2,171,071,300	1,860,710,000	-14.3%	1,888,178,000	1.5%
Service miles	2,015,081,800	1,676,709,000	-16.8%	1,750,041,000	4.4%
Fuel consumed (gallons)	344,977,400	303,629,000	12.0%	310,079,600	2.1%
Employment	135,100	133,200	-1.4%	128,300	-3.7%
<b>Operating Ratios</b>					
passenger trips per motorcoach	15,600	16,400	5.1%	16,500	0.6%
passenger miles per motorcoach	1,897,400	1,710,000	-9.9%	1,693,000	-1.0%
miles traveled per motorcoach	54,100	50,400	-6.8%	51,700	2.6%
service miles traveled per motorcoach	50,200	45,400	-9.6%	47,900	5.5%
passengers per service mile	37.8	37.6	-0.4%	35.3	-6.1%
miles per gallon of fuel	6.3	6.1	-2.6%	6.1	-0.6%
passenger miles per gallon of fuel	220.8	207.8	-5.9%	199.4	-4.0%
employment per motorcoach	3.4	3.6	7.2%	3.5	-2.7%
<b>Demographics</b>					
Students	25.2%	21.0%	-16.7%	22.0%	5.0%
Senior	26.2%	28.3%	7.9%	26.6%	-5.9%
All Other	48.5%	50.7%	4.5%	51.3%	1.2%
<b>Average Passenger Loads</b>					
Charter Average Passengers	41.6	40.9	-1.6%	38.7	-5.3%
Packaged Tour Average Passengers	41.1	37.0	-10.0%	35.4	-4.5%
Sightseeing Average Passengers	39.6	37.2	-6.2%	34.6	-7.0%
Fixed-Route Average Passengers	34.5	35.2	1.9%	32.6	-7.2%

Passenger trips decreased from 627 million to 605 million in 2013, or 3.5%, and decreased from 605 million to 604 million in 2014, or 0.2%.

**Figure 4-1**

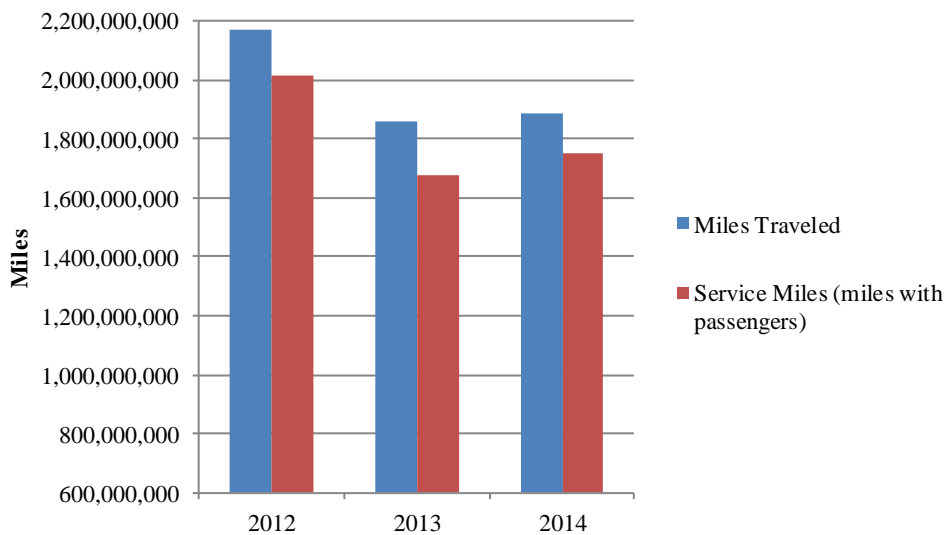
*Passenger Trips over Three Years*



Service miles decreased from 2.015 billion to 1.677 billion in 2012, or 16.8%, and increased from 1.677 billion to 1.750 billion in 2013, or 4.4%.<sup>6</sup>

**Figure 4-2**

*Mileage over Three Years*



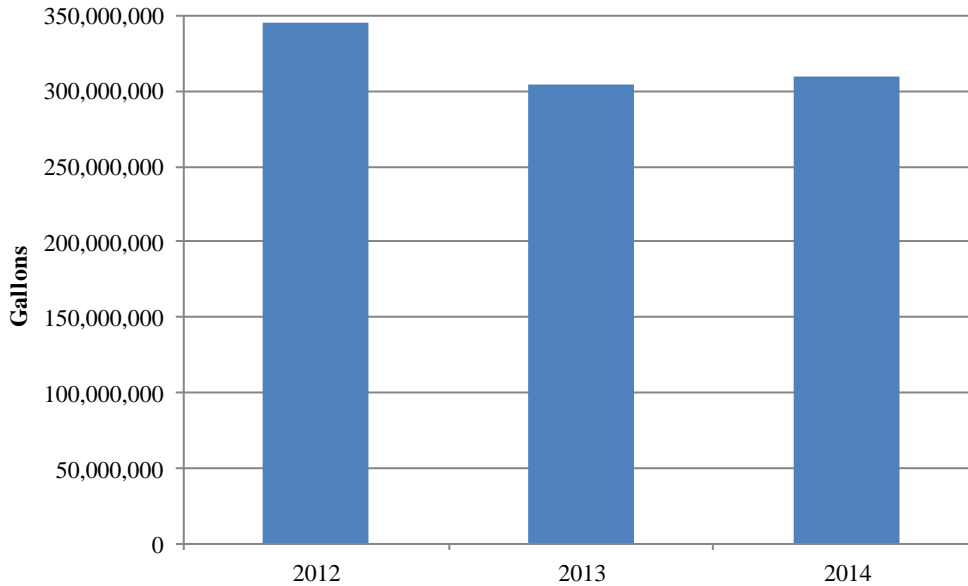
Fuel consumed decreased from 345.0 million gallons in 2012 to 303.6 million gallons in 2013, or 12.0%, and increased from 303.6 million gallons in 2013 to 310.1 million gallons in 2014, or 2.1%.

<sup>6</sup> A passenger mile equals one passenger traveling for one mile, and a passenger trip measures one passenger going on a one-way trip. Thus, passenger trips can increase as passenger miles decrease due to a decrease in miles traveled and an increase in average passenger load.

**Figure 4-3**

*Fuel Consumed Over Three Years*

---

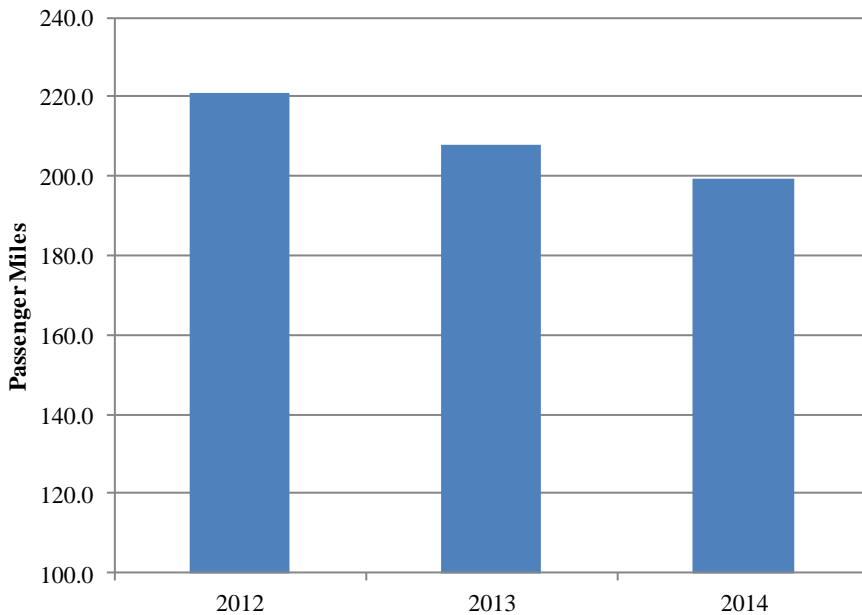


Passenger miles per gallon of fuel decreased from 220.8 to 207.8 in 2013, or 5.9%, and decreased from 207.8 to 199.4 in 2014, or 4.0%.

**Figure 4-4**

*Passenger Miles per Gallon of Fuel over Three Years*

---

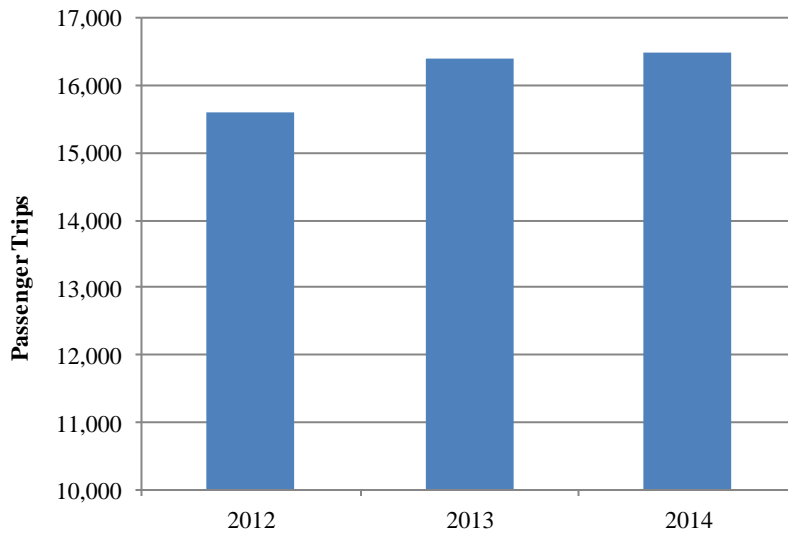


From 2012 to 2013, passenger trips per motorcoach increased from 15,600 to 16,400, or 5.1%. Passenger trips per motorcoach also increased in 2013 to 2014, from 16,400 to 16,500, or 0.6%.

**Figure 4-5**

*Passenger Trips per Motorcoach over Three Years*

---

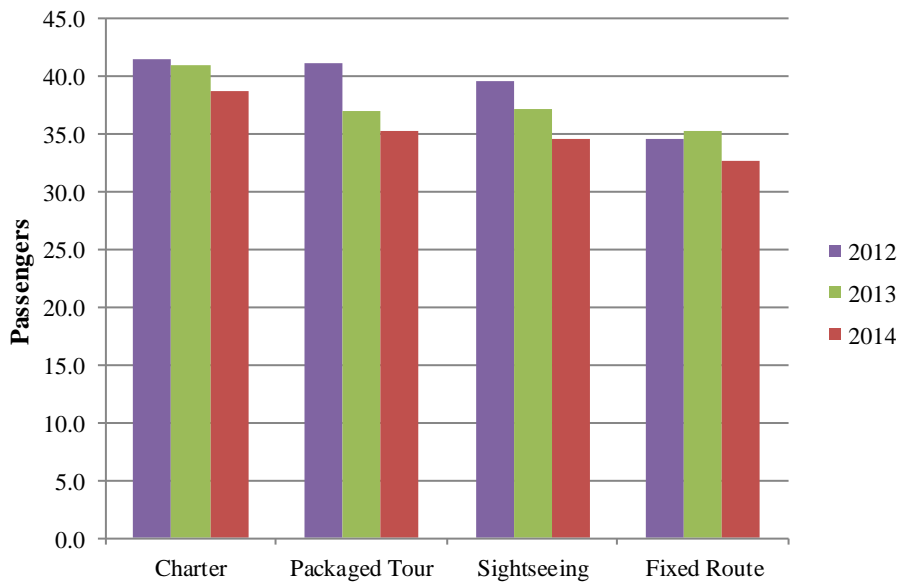


The industry witnessed decreases in average passenger load across all four types of service. Average charter load decreased slightly, from 40.9 in 2013 to 38.7 in 2014, or 5.3%. Fixed-route service saw the largest decrease in 2014, as average passenger load decreased from 35.2 in 2013 to 32.6, or 7.2%.

**Figure 4-6**

*Average Passenger Load Over Three Years*

---



# Appendix A. Study Methodology

The American Bus Association Foundation commissioned the *Motorcoach Census* to measure the size and activity of the motorcoach transportation service industry in the United States and Canada. The study estimates and reports total industry size and activity for the year 2014. This appendix describes the data sources and methodologies used in the study. The appendix describes the target population, the survey frame, the survey data collection and processing, the estimation of industry size, and the estimation of industry activity.

## Target Population

The target population of the study is the motorcoach transportation service industry in the United States and Canada in 2014.

The industry consists of private-sector organizations that lease/own and operate motorcoaches and offer motorcoach transportation services to the public, including to private and public sector organizations on a contract basis. The industry includes, for example, motorcoach transportation companies that are hired on a contract basis by state or city transit authorities to transport commuters. The industry excludes governments, transit agencies or other public-sector organizations that lease/own and operate motorcoaches and offer motorcoach transportation services to the public. The industry also excludes private and public-sector organizations that lease/own and operate motorcoaches just for their own use, such as businesses that operate motorcoaches to shuttle their employees.

Motorcoach transportation services include motorcoach charter services, tour and sightseeing services using motorcoaches, and motorcoach passenger transportation over regular routes and on regular schedules, such as airport shuttle services, commuter transportation services, and scheduled intercity and rural transportation services. The seven types of motorcoach transportation service that were used in this study are defined below:

- **Charter** – A preformed group (organization, association, tour company, shuttle service, church, school, etc.) who hires a motorcoach for exclusive use under a fixed contract.
- **Packaged/Retail Tour** – A planned or prearranged trip offered for sale by a motorcoach transportation company (including a tour company that leases/owns and operates motorcoaches) at a fixed price to leisure travelers. Price usually includes lodging, meals, sightseeing, and transportation.
- **Sightseeing** – A service offered by motorcoach or tour companies to view points of interest within a specified area.
- **Airport Shuttle** – A private motorcoach service usually operating on a fixed-route to transport passengers to and from airports.
- **Commuter** – A fixed-route bus service, characterized by service predominantly in one direction during peak periods, limited stops, use of multi-ride tickets, and routes of extended length, usually between the central business district and outlying suburbs.
- **Scheduled** – A specified, ticketed, predetermined regular-route service between cities or terminals.
- **Special Operations** – Published, regular-route service to special events, such as fairs, sporting events, or service for employees to work sites.

A motorcoach, or over-the-road bus (OTRB), is defined for this study as a vehicle designed for long-distance transportation of passengers, characterized by integral construction with an elevated passenger deck located over a baggage compartment. It is at least 35 feet in length with a capacity of more than 30 passengers. This definition closely matches the definition of an OTRB written into U.S. law, namely “a bus characterized by an elevated passenger deck located over a baggage compartment” (Section 3038 of Public Law 105-178, 49 USC 5310 note).

This definition of a motorcoach excludes the typical city transit bus, which is designed for urban and suburban routes, and city sightseeing buses, such as double-decker buses and trolleys.

## Survey Frame

In November 2011, John Dunham & Associates assembled a list (i.e., survey frame) of carriers in the United States and Canada that potentially offer motorcoach transportation services to the public. The list was developed using information from the following sources:

- Prior motorcoach census research
- American Bus Association Foundation
- Dun & Bradstreet Inc.
- U.S. Department of Transportation
- United Motorcoach Association

Potential carriers were identified by name, trade name, mailing address, contact name, phone number, e-mail address, and fax number.

Outside of the *Motorcoach Census* no comprehensive source of company information on motorcoach operators is publicly available. Data sources often contradict each other, and most listings are either out of date or inaccurate. Companies that operate motor coaches are often combined with transit service providers, companies that operate school buses or firms that use smaller passenger vans. In conducting surveys for the *Motorcoach Census* over the past four years, JDA has had direct contact with more than 4,800 potential carriers. Throughout the survey process, JDA identified companies that were no longer in business, did not operate motorcoaches as defined for the purposes of this study, or had disconnected phone numbers or outdated addresses. JDA will continue to refine the numbers for future Motorcoach Censuses.

While there have been adjustments to JDA’s earlier estimates, the total number of motorcoach operators has also decreased, and by directly contacting companies JDA was able to determine a number of companies had gone out of business, merged with other companies, or been acquired by larger companies. JDA estimates that, in 2014, there were 3,330 companies operating in the United States and 298 operating in Canada, for a total of 3,628 companies. This is 4.6% fewer companies than in 2013.

**Table A-1**  
*The Motorcoach Industry by Size of Fleet – U.S. and Canada – 2012-2014*

Fleet Size	Total Carriers		
	2012	2013	2014
1 to 9	3,260	3,115	2,961
10 to 24	469	462	439
25 to 49	156	155	155
50 to 99	49	50	50
100 or more	20	19	23
<b>Total</b>	<b>3,954</b>	<b>3,801</b>	<b>3,628</b>

The motorcoach industry experienced a decline in the size of companies due to mergers and acquisitions, companies going out of business, and companies discontinuing motorcoach service. From 2013 to 2014, the industry decreased in size by 173 companies. Of the decline, 77.1% was due to companies going out of business, 14.6% was due to companies discontinuing motorcoach service, and 8.3% was due to mergers and acquisitions in the industry.

**Table A-2**



*Decreases in Total Companies in the Motorcoach Industry from 2013 to 2014 – U.S. and Canada*

	<b>Decline from 2013</b>	<b>Percent</b>
Discontinued Motorcoach Service	25	14.6%
Out of Business	133	77.1%
Sold or Merged	14	8.3%
<b>Total Change</b>	<b>173</b>	<b>100.0%</b>

### Survey Data Collection and Processing

Survey questionnaires with cover letters from John Dunham & Associates (JDA) and business-reply envelopes were mailed with first-class postage to potential carriers. The potential carriers were given the option of completing the survey online, by e-mail, or over the phone. JDA and the American Bus Association Foundation (ABAF) made follow-up solicitations to potential carriers by both e-mail and phone. The ABAF sent notices several times to its members by e-mail encouraging them to participate in the survey.

Submitted electronic and paper questionnaires were reviewed for completeness and validity. Additional contact was made selectively to resolve unclear responses and to prompt response to questions left unanswered. JDA consolidated the information from all surveys collected into one database. The data were tabulated and evaluated for inconsistencies, irregularities, and respondent-specific values that were significantly different from average reported values. Survey respondents were contacted to clarify anomalous answers. The final survey database contained usable responses from 381 motorcoach carriers. Table A-3 presents the sample sizes realized from the returns to the *Motorcoach Census* survey of motorcoach carriers.

**Table A-3**

*Sample Sizes Realized from Returns to the Survey of Motorcoach Carriers for Data Items Applicable to All Carriers*

	<b>Motorcoach Fleet Size</b>					<b>Total</b>
	<b>1 to 9</b>	<b>10 to 24</b>	<b>25 to 49</b>	<b>50 to 49</b>	<b>100 or More</b>	
<i>Number of carriers reporting information</i>						
<b>Total reporting</b>	<b>205</b>	<b>95</b>	<b>36</b>	<b>29</b>	<b>16</b>	<b>381</b>
Employment	189	93	36	29	14	361
Motorcoaches	205	95	36	29	16	381
Fuel	150	82	28	21	14	295
Mileage	162	84	28	22	14	310
Mileage by Service	196	94	35	29	14	368
Passengers by Service	188	90	34	26	14	352
Year Founded	203	94	35	29	14	361
Leased/Purchased Motorcoaches	204	93	36	29	14	362
Wholesale/Retail Gasoline	196	92	34	28	14	350
Other Vehicles	176	91	34	29	13	330
Passenger Demographics	176	78	28	20	9	302

Overall, the margin of error for the survey is 4.75% at a 95% confidence interval.

## **Estimating the Size of the Motorcoach Industry in 2014**

Throughout the survey process, JDA identified companies that were no longer in business, did not operate motorcoaches, or had disconnected phone numbers and bad addresses. JDA assumed that the companies with bad addresses and/or disconnected phone numbers were out of business and did not count them as motorcoach operators.

### **The Motorcoach Industry by Size of Fleet**

In order to determine the size of the motorcoach industry by fleet size, JDA relied upon survey collection efforts. Even in the case of a motorcoach operator that did not wish to complete the survey, JDA attempted to verify the total motorcoaches operated by the company. As a result, JDA verified the number of motorcoaches operated by 1,161 companies. The 1,161 companies identified by JDA operated 20,117 motorcoaches in 2014, or 55.1% of the of the total industry fleet in Canada and the United States. JDA also identified and targeted the largest companies to verify the exact number of companies (23) that operated over 100 motorcoaches in 2014. JDA kept the number of companies with over 100 motorcoaches constant at 23 and estimated the distribution of the remaining companies in accordance with the observed results.

### **Estimating Motorcoach Industry Activity in 2014**

To estimate a population total for the activity of the motorcoach industry, John Dunham & Associates calculated sample totals for the types of activity measured (passenger trips, mileage, fuel consumed, and employment). Then, John Dunham estimated the total motorcoaches in each fleet size category using the mean motorcoaches operated in each fleet size category of the sample population. Third, the sample totals were multiplied by weights to calculate population totals for each fleet size category. Each fleet size category was weighted by the estimated population total of motorcoaches in the category divided by the sample total of motorcoaches in the category. After weighting all of the sample totals by fleet size, the population totals for each fleet size were summed to calculate an industry total.