

# Motorcoach Census Update 2006



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## Study Summary

*Motorcoach Census Update 2006* is a study commissioned by the American Bus Association (ABA) to update three 2004 industry statistics in *Motorcoach Census 2005*:<sup>1</sup> (1) number of motorcoaches operated, (2) motorcoach mileage, and (3) number of passenger trips. The 2005 study found that in 2004 the motorcoach industry in the United States and Canada operated 38,490 motorcoaches, drove motorcoaches 2.380 billion miles, and provided 595 million passenger trips. In this 2006 update study, we estimated that in 2005

- the number of motorcoaches operated was up 1.5% to 39,068,
- motorcoach mileage was up 2.3% to 2.444 billion miles, and
- motorcoach passenger trips was up 6.1% to 631 million passenger trips.

Because the percentage increase in passenger trips was greater than the percentage increases in the number of motorcoaches and motorcoach mileage, carriers have achieved better utilization of their motorcoaches as indicated by two measures. First, average annual passenger trips per motorcoach increased from 15,459 in 2004 to 16,151 in 2005, an increase of 4.5%. Second, average annual mileage per motorcoach increased slightly from 62,094 in 2004 to 62,558 in 2005, an increase of 0.7%.

## Study Methodology

We based the estimates in part on data collected in a survey of motorcoach carriers that was conducted in July and August of 2006. Survey questionnaires were distributed to about two thousand motorcoach carriers by e-mail or fax, resulting in usable returns from 205 carriers that operated 8,564 motorcoaches in 2005. Thirteen responses had information about motorcoach activity in Canada.

The survey questionnaire asked carriers for their motorcoach fleet size, motorcoach mileage, and number of passenger trips for the years 2004 and 2005.

We acknowledge and thank the United Motorcoach Association, Trailways, International Motorcoach Group, and Motor Coach Canada for their crucial support in conducting the survey.

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<sup>1</sup> Nathan Associates Inc. *Motorcoach Census 2005*. Arlington, Virginia. *Motorcoach Census* is a comprehensive benchmarking study of the motorcoach industry in the United States and Canada that ABA conducts every five years.

Our 2005 estimates were derived from 2004 industry totals from *Motorcoach Census 2005* (Table 1) and average 2005 percentage changes calculated from the survey returns (Table 2).

**Table 1**  
*2004 Industry Totals from Motorcoach Census 2005*

Motorcoach Fleet Size	Motorcoaches	Mileage (millions)	Passenger Trips (millions)
100 or more	9,781	819	202
50-99	5,348	304	78
25-49	5,108	318	98
10-24	9,474	511	119
Less than 10	8,779	438	98
Industry total	38,490	2,390	595

**Table 2**  
*2005 Percentage Changes Calculated from Survey Returns*

Motorcoach Fleet Size	Motorcoaches	Mileage	Passenger Trips
100 or more	a	a	a
50-99	-6.2%	-3.6%	-6.1%
25-49	1.2%	6.6%	7.4%
10-24	3.1%	6.8%	9.9%
Less than 10	9.3%	9.0%	13.5%

For each industry characteristic, we calculated 2005 totals for each fleet-size category by multiplying the 2004 totals by the 2005 percentage changes.

For the largest fleet-size category (100 or more motorcoaches), because the operating characteristics of scheduled intercity carriers were different from the other carriers in the category, preliminary 2005 totals were calculated excluding these carriers, then the 2005 survey data of the scheduled intercity carriers were added to the preliminary totals to calculate the fleet-size category totals.

The fleet-size totals are presented in Table 3. We calculated an 2005 industry total for a characteristic by summing its fleet-size category totals.

**Table 3**  
*2005 Industry Totals for Motorcoaches, Mileage and Passenger Trips*

<b>Motorcoach Fleet Size</b>	<b>Motorcoaches</b>	<b>Mileage (millions)</b>	<b>Passenger Trips (millions)</b>
100 or more	9,520	789	211
50-99	5,016	293	73
25-49	5,169	339	105
10-24	9,768	546	131
Less than 10	9,595	477	111
Industry total	39,068	2,444	631