

# Motorcoach Census

A Study of the Size and Activity of the  
Motorcoach Industry in the United States and Canada in 2013



Prepared for the American Bus Association Foundation  
by John Dunham & Associates  
March 12, 2015

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# Executive Summary

*Motorcoach Census 2014* 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 2013. The study provides information on the scope and impact of the motorcoach industry that builds upon earlier census research.

In 2013, the motorcoach industry in the United States and Canada consisted of 3,801 companies that operated 36,903 motorcoaches. In the United States, 3,471 companies operated 32,811 motorcoaches and, in Canada, 330 companies operated 4,092 motorcoaches.

**Passenger Trips** – The motorcoach industry provided 605 million passenger trips in 2013. About 38.5% of these trips were provided by large companies that operated 100 or more motorcoaches, 23.0% by mid-size companies operating 25 to 99 motorcoaches and 38.5% by small companies operating fewer than 25 motorcoaches. The industry moved individual passengers a total of 63.1 billion miles in 2013.

**Services** – Motorcoach companies offer a diverse variety of services. About 98% of motorcoach companies provided charter service in 2013, 38% provided tour service, 13% provided sightseeing, 19% provided airport shuttle, 16% provided scheduled service, 7% provided special operations, and 5% provided commuter services. Charter service accounted for about 48.4% of motorcoach service mileage, followed by scheduled service (33.9%), commuter (6.0%), packaged tour (6.0%), airport service (2.3%), sightseeing (2.2%), and special operations (1.1%).

**Companies** – The majority (94%) of companies were small, and operated fewer than 25 motorcoaches. All told, these firms operated 19,285 motorcoaches, provided 232.8 million passenger trips, and accounted for 39% of motorcoach mileage. Mid-sized companies, those that operated 25 to 99 motorcoaches, ran 8,714 motorcoaches, provided 139.3 million passenger trips, and accounted for 25% of the industry's motorcoach mileage. Large companies that operated over 100 motorcoaches accounted for 24% of the industry's fleet, provided 39% of the industry's passenger trips, and 36% of the industry's motorcoach mileage.

**Employment** – The motorcoach industry provided jobs to 133,200 people in 2013; 71,900 full-time and 61,300 part-time. On average, a motorcoach company provided 35.0 jobs or 3.6 jobs per motorcoach. Small companies – those that operated fewer than 25 motorcoaches – provided for 55% of motorcoach industry jobs. Mid-sized companies – those that operated between 25 and 99 motorcoaches – provided for 21% of motorcoach industry jobs. Large companies – those that operated more than 100 motorcoaches – provided for 25% 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 2013, 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 37.6 passengers achieved 207.8 passenger miles per gallon of fuel in 2013.

**Motorcoach Use** – On average, a motorcoach provided 16,400 passenger trips in 2013, provided 1.7 million passenger miles, employed 3.6 people, used 8,200 gallons of fuel, and traveled 50,400 miles. About 56.6% of the

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<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 43.4% 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 2013**

*United States:*

Motorcoach carriers.....	3,471
Motorcoaches.....	32,811

*Canada:*

Motorcoach carriers.....	330
Motorcoaches.....	4,092

*Total:*

Motorcoach carriers.....	3,801
Motorcoaches.....	36,903

**2. Motorcoach Industry Activity in the United States and Canada in 2013**

Passenger trips.....	605.1 million
Passenger miles.....	63.1 billion
Miles traveled.....	1.86 billion
Service miles (miles with passengers).....	1.68 billion
Fuel consumed (gallons).....	303.6 million
Employment.....	133,200

**3. Motorcoach Operating Ratios for 2013**

Passenger trips per motorcoach.....	16,400
Passenger miles per motorcoach.....	1.7 million
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
Passenger miles per gallon of fuel.....	207.8
Employment per motorcoach.....	3.6

**4. Demographics of Motorcoach Passenger Trips**

Students.....	21.0%
Senior.....	28.3%
All other.....	50.7%

# 1. Introduction

*Motorcoach Census 2014* 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 2013. 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 just 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 407 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 407 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 2013. 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 2013

*Motorcoach Census 2014* reports estimates of the size and activity of the motorcoach transportation services industry in the United States and Canada in calendar year 2013. 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 2013, the motorcoach industry in the United States and Canada consisted of 3,801 carriers and 36,903 motorcoaches (Table 2-1). In the United States, 3,471 carriers operated 32,811 motorcoaches and, in Canada, 330 carriers operated 4,092 motorcoaches. The average carrier operated 9.7 motorcoaches.

**Table 2-1**

*Total Carriers and Motorcoaches in 2013 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	19	0.5%	8,904	24.1%	468.6	189	8,224	491
50 to 99	50	1.3%	3,359	9.1%	67.2	365	2,822	159
25 to 49	155	4.1%	5,355	14.5%	34.5	600	4,662	94
10 to 24	462	12.2%	7,023	19.0%	15.2	606	6,154	264
1 to 9	3,115	82.0%	12,262	33.2%	3.9	1,320	10,467	475
Industry Total	3,801	100.0%	36,903	100.0%	9.7	3,079	32,329	1,483

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

### Passenger Trips

The motorcoach industry in the United States and Canada provided 605 million passenger trips in 2013 (Table 2-2). The average carrier provided 159,200 passenger trips and an average motorcoach provided 16,400 passenger trips.

**Table 2-2**

*Motorcoach Passenger Trips in 2013 by Fleet Size*

Motorcoach Fleet Size	Passenger Trips		Average Passenger Trips per:	
	Total	Percent	Motorcoach	Carrier
100 or more	233,017,000	38.5%	26,200	12,264,100
50 to 99	56,827,000	9.4%	16,900	1,136,500
25 to 49	82,452,000	13.6%	15,400	531,900
10 to 24	100,457,000	16.6%	14,300	217,400
1 to 9	132,331,000	21.9%	10,800	42,500
Industry Total	605,084,000	100.0%	16,400	159,200

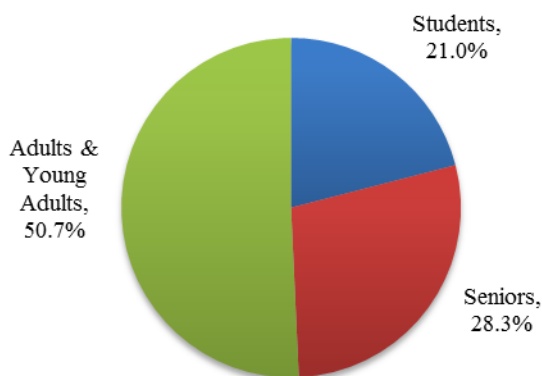
Note: Percentages may not sum to 100% because of rounding.

The largest carriers (100 or more motorcoaches) provided 233 million passenger trips and accounted for 38.5% of passenger trips in 2013, which, on average, amounts to 12.3 million passenger trips per carrier. Motorcoaches operated by large carriers provided an average of 26,200 passenger trips per motorcoach in 2013.

Small carriers with fewer than 25 motorcoaches provided 38.5% of industry passenger trips, which is, on average, 65,100 passenger trips per carrier and 12,100 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 49.3% of the passenger trips provided by the motorcoach industry in 2013.<sup>2</sup>

**Figure 2-1**  
*Passenger Trips by Type of Passenger, 2013*



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 63.1 billion passenger miles in 2013 (Table 2-3). On average, each carrier generated 16.6 million passenger miles and each motorcoach generated 1.7 million passenger miles.

**Table 2-3**  
*Motorcoach Passenger Miles in 2013 by Fleet Size*

Motorcoach Fleet Size	Passengers Miles		Average Passenger Miles per:	
	Number	Percent	Motorcoach	Carrier
100 or more	23,572,234,000	37.4%	2,647,000	1,240,644,000
50 to 99	5,200,776,000	8.2%	1,548,000	104,016,000
25 to 49	8,875,499,000	14.1%	1,657,000	57,261,000
10 to 24	10,643,816,000	16.9%	1,516,000	23,039,000
1 to 9	14,800,227,000	23.5%	1,207,000	4,751,000
Industry Total	63,092,552,000	100.0%	1,710,000	16,599,000

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

The largest carriers (100 or more motorcoaches) accounted for about 37.4% of industry passenger miles. On average, a large carrier accounted for 1.2 billion passenger miles, or 2.6 million passenger miles per motorcoach; the largest of any fleet-size category.

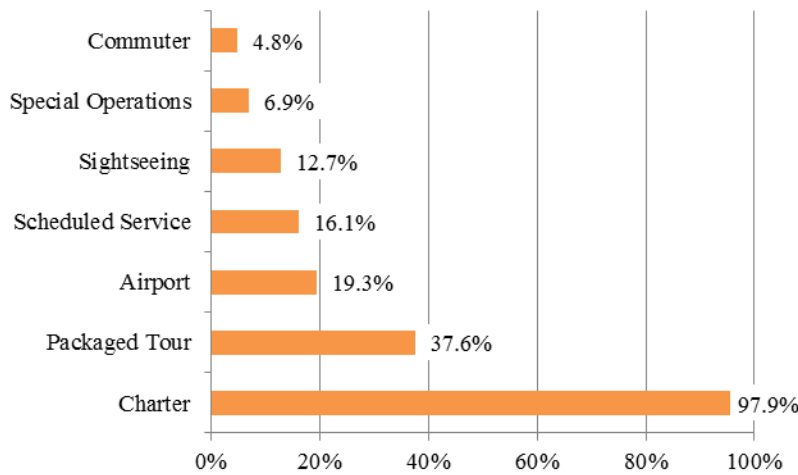
<sup>2</sup> Students are defined as those 18 years of age and younger. Young adults are defined as those of 19 to 30 years of age. Adults are defined as those of 31 to 54 years of age.

The smallest carriers, those with a fleet size of fewer than 25 motorcoaches, operated the smallest average number (1.3 million) of passenger miles per motorcoach. They averaged 7.1 million passenger miles per carrier for a total of 25.4 billion passenger miles, or 40.3% of industry passenger miles.

## Services Provided

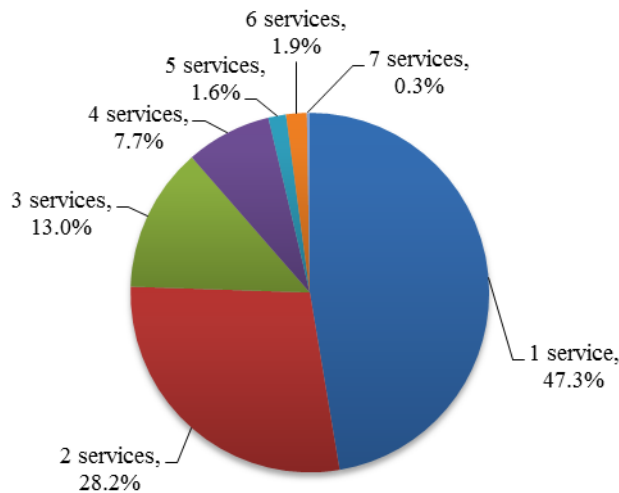
The services offered by the motorcoach industry are diverse. Many carriers offered multiple types of service. Nearly all carriers (97.9%) provided charter service in 2013, followed by tour (37.5%), airport shuttle (19.1%), scheduled service (15.7%), sightseeing (12.8%), special operations (6.9%), and commuter service (4.8%).

**Figure 2-2**  
*Percentage of Carriers Providing Types of Service in 2013*



In 2013, 52.7% of carriers provided more than one service. Approximately (47.3%) carriers had mileage in 2013 for just one service, 28.2% offered two services, 13.0% offered three services, 7.7% offered four services, 1.6% offered five services, 1.9% offered six services, and 0.3% offered all seven services.

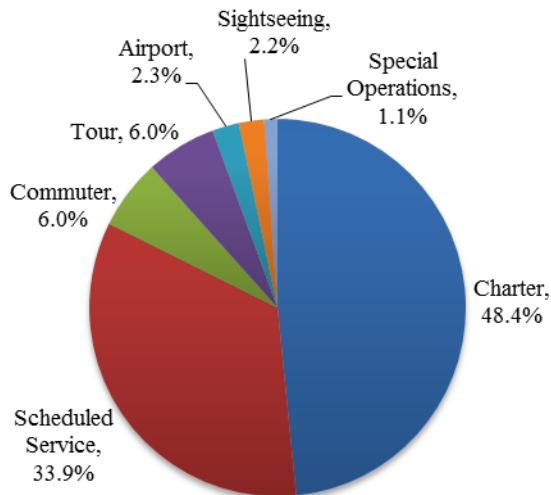
**Figure 2-3**  
*Percentage of Carriers by Number of Services Provided in 2013*



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

Of the service miles driven by motorcoach companies in 2013, 82.3% were dedicated to charter and scheduled services. Charter service accounted for 48.4% of the service miles traveled and scheduled route service accounted for 33.9%, followed by commuter (6.0%), packaged tour (6.0%), airport service (2.3%), sightseeing (2.2%) and special operations (1.1%).

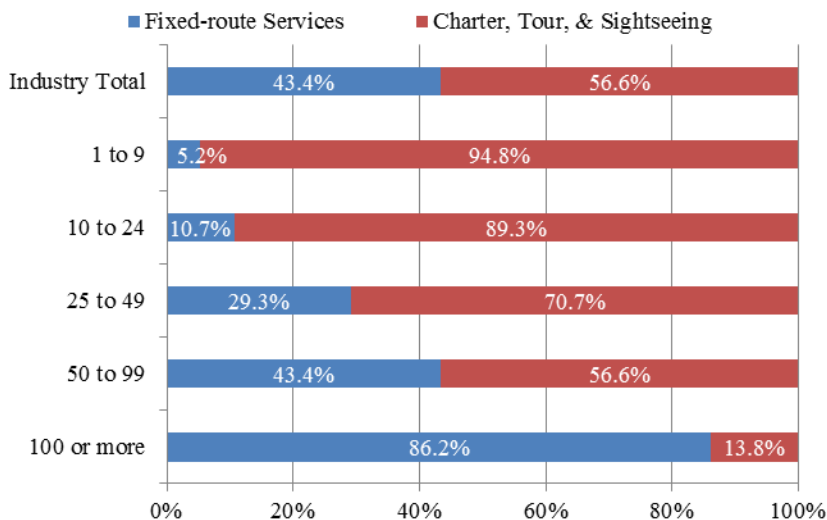
**Figure 2-4**  
*Percentage of Motorcoach Service Mileage in 2013 by Type of Service*



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

About 56.6% of motorcoach service mileage was accounted for by charter, tour, and sightseeing services, and 43.4% 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 5.2% of mileage for the smallest carriers to 86.2% for the largest carriers.

**Figure 2-5**  
*Motorcoach Service Mileage in 2013 by Type of Service and Fleet Size*



## Vehicle Mileage

Industry motorcoaches traveled 1.86 billion miles in 2013, averaging 489,500 miles per carrier and 50,400 miles per motorcoach. The largest carriers with over 100 motorcoaches averaged 75,500 miles per motorcoach, while the smallest carriers – those with fewer than 10 motorcoaches – averaged 36,000 miles per motorcoach. Service mileage (miles traveled with passengers) accounted for 1.68 billion (90.1%) of the 1.86 billion total miles that motorcoach vehicles traveled in 2013.

**Table 2-4**  
*Motorcoach Vehicle Mileage in 2013 by Fleet Size*

Motorcoach Fleet Size	Vehicle Mileage		Average Vehicle Mileage per:	
	Number	Percent	Motorcoach	Carrier
100 or more	671,809,000	36.1%	75,500	35,358,400
50 to 99	177,506,000	9.5%	52,800	3,550,100
25 to 49	282,594,000	15.2%	52,800	1,823,200
10 to 24	287,131,000	15.4%	40,900	621,500
1 to 9	441,670,000	23.7%	36,000	141,800
Industry Total	1,860,710,000	100.0%	50,400	489,500

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

## Fuel Consumption

Industry motorcoaches consumed 303.6 million gallons of fuel in 2013. Each carrier, on average, consumed 79,900 gallons of fuel, or 8,200 gallons per motorcoach. Motorcoach fuel efficiency averaged 6.1 miles per gallon. With this fuel efficiency, a motorcoach carrying the industry average of 37.6 passengers achieved 207.8 passenger miles per gallon in 2013.

**Table 2-5**  
*Motorcoach Fuel Consumption in 2013 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	99,943,000	32.9%	11,200	5,260,200	6.7
50-99	31,207,000	10.3%	9,300	624,100	5.7
25 to 49	48,275,000	15.9%	9,000	311,500	5.9
10 to 24	49,032,000	16.1%	7,000	106,100	5.9
1 to 9	75,172,000	24.8%	6,100	24,100	5.9
Industry Total	303,629,000	100.0%	8,200	79,900	6.1

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

## Employment

The motorcoach industry in the United States and Canada employed 133,200 people in 2013, averaging 35 employees per carrier and 3.6 employees per motorcoach (Table 2-6). The largest carriers with over 100

motorcoaches averaged 1,742 employees per carrier and 3.7 employees per motorcoach, while the smallest carriers with fewer than 10 motorcoaches averaged 17 employees per company and 4.2 employees per motorcoach.<sup>3</sup>

**Table 2-6**  
*Motorcoach Carrier Employment in 2013 by Fleet Size*

Motorcoach Fleet Size	Employment		Average Employment per:	
	Total	Percent	Motorcoach	Carrier
100 or more	33,100	24.8%	3.7	1,742
50 to 99	9,600	7.2%	2.9	192
25 to 49	17,900	13.4%	3.3	115
10 to 24	21,200	15.9%	3.0	46
1 to 9	51,400	38.6%	4.2	17
Industry Total	133,200	100.0%	3.6	35

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

Of the 133,200 people employed by the motorcoach industry in 2013, 71,900 (54.0%) were full-time and 61,300 (46.0%) 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 (76.4%) than the smallest carriers with fewer than 10 motorcoaches (41.6%).

**Table 2-7**  
*Full- and Part-time Employment in 2013 by Fleet Size*

Motorcoach Fleet Size	Full-time Employees	Part-Time Employees	Percent Full-time	Percent Part-time
100 or more	25,300	7,800	76.4%	23.6%
50 to 99	5,400	4,200	56.3%	43.8%
25 to 49	9,800	8,100	54.7%	45.3%
10 to 24	10,000	11,200	47.2%	52.8%
1 to 9	21,400	30,000	41.6%	58.4%
Industry Total	71,900	61,300	54.0%	46.0%

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

## Student Motorcoach Tourism

The motorcoach industry provided 87.7 million tourism passenger trips to students in 2013. Students accounted for 23.5% 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 1.1 motorcoach tourism passenger trips in 2013.<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 (23.5 percent) are higher than student shares of passenger trips by type (21.0 percent) because the latter also includes fixed route services.

<sup>5</sup> Ibid.

# 3. Motorcoach Carrier Characteristics

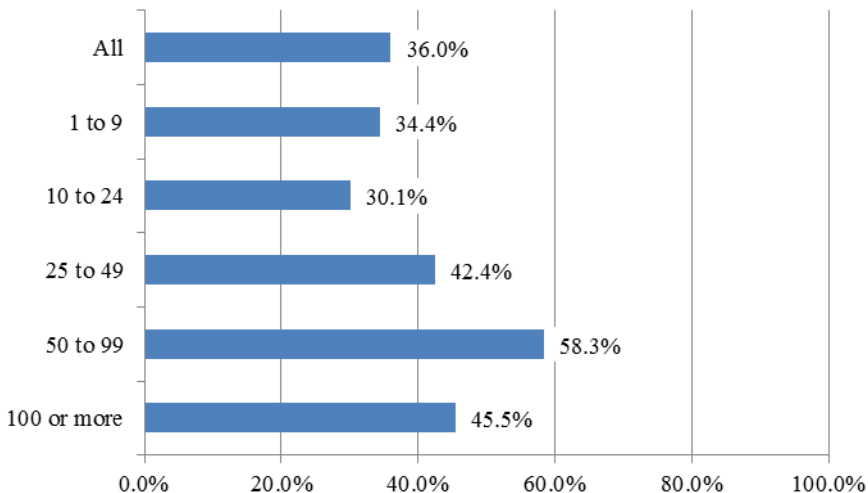
The *Motorcoach Census 2014* survey of motorcoach carriers in the United States and Canada collected additional information on the operating characteristics of the carriers. This chapter presents summary statistics on this information. Included are industry estimates relating to competition from transit 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 2013, 36.0% of motorcoach carriers in the United States experienced competition from transit agencies. Of the largest carriers (100 or more motorcoaches), 45.5% encountered competition from transit agencies in 2013. Of the smallest carriers, 34.4% competed with transit agencies for business. More than two in five motorcoaches (39.6%) were operated by carriers that experienced competition from transit agencies in 2013.

**Figure 3-1**

*Percentage of Carriers that Have Competed with Transit Agencies for Business*



## Age of Motorcoaches

In 2013, the average manufacture year of motorcoaches operated by carriers in the United States and Canada was 2004, while the median manufacture year was 2003. 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 2004 and the average motorcoach operated by carriers with between 25 and 49 motorcoaches was manufactured in 2005. 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 2006.

## How Motorcoaches Were Acquired

In 2013, 5.8% of motorcoach carriers operated only leased motorcoaches in their fleet, while 74.9% only operated purchased motorcoaches, and 19.3% 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	10.0%	60.0%	30.0%
50 to 99	8.3%	70.8%	20.8%
25 to 49	5.9%	61.8%	32.4%
10 to 24	4.3%	72.8%	22.8%
1 to 9	6.0%	78.5%	15.5%
Industry Total	5.8%	74.9%	19.3%

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

Survey results indicate that 87.2% of the motorcoaches in the industry were purchased (Table 3-2). Large companies with over 100 motorcoaches owned 87.1% of their vehicles, while small companies with fewer than 10 motorcoaches owned 87.0% of their vehicles.

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

Motorcoach Fleet Size	Leased	Purchased
100 or more	12.9%	87.1%
50 to 99	13.2%	86.8%
25 to 49	13.1%	86.9%
10 to 24	11.6%	88.4%
1 to 9	13.0%	87.0%
Industry Total	12.8%	87.2%

## How Fuel Was Purchased

Of respondents to the survey, 58.8% of carriers in the United States and Canada purchased fuel for their motorcoaches only at retail in 2013, while very few (7.5%) bought only at wholesale, and 33.7% 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, 77.5% purchased fuel only at retail versus 8.3% for the 50 to 99 motorcoach fleet-size category. Of the carriers with over 100 motorcoaches that responded to the survey, 66.7% 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	0.0%	33.3%	66.7%
50 to 99	8.3%	16.7%	75.0%
25 to 49	12.5%	12.5%	75.0%
10 to 24	47.7%	2.3%	50.0%
1 to 9	77.5%	6.8%	15.8%
Industry Total	58.8%	7.5%	33.7%

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



Even though 58.8% of motorcoach carriers reported buying fuel only at retail, 51.7% of motorcoach fuel was actually purchased at wholesale in 2013 (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 (15.7%) at wholesale, and the largest carriers with over 100 motorcoaches purchased 72.6% 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	27.4%	72.6%
50-99	31.5%	68.5%
25-49	35.0%	65.0%
10-24	59.4%	40.6%
Fewer than 10	84.3%	15.7%
Industry Total	48.3%	51.7%

## 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 2.8% of reporting carriers were founded before 1920 and 8.1% of carriers were founded before 1940. More than half of all carriers (54.2%) were founded in or after 1990 and three in every ten (30.0%) carriers were founded in or after 2000. The average founding year of reporting carriers is 1984 and the median founding year of reporting carriers is 1991. By decade, most carriers were founded in between 2000 and 2009 (25.2%), closely followed by the 1990s (24.2%) and the 1980s (18.4%).

**Table 3-5**

*Percentages of Motorcoach Carriers by Year Founded*

<b>Year Founded</b>	<b>Percent of Carriers</b>
Pre-1920	2.8%
1920-1939	5.3%
1940-1959	8.6%
1960-1979	10.8%
1980s	18.4%
1990s	24.2%
2000-Present	30.0%

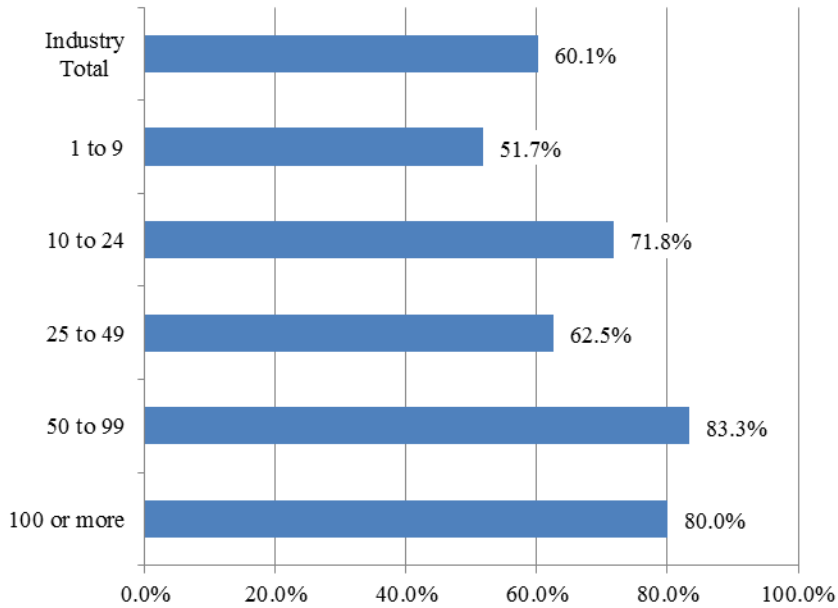
Note: Percentages may not sum to 100% because of rounding.

## Other Revenue-Generating Passenger Vehicles

Of the survey respondents, 60.1% of the carriers reported operating other revenue-generating passenger vehicles in addition to their motorcoaches. Of the survey respondents operating 100 or more motorcoaches, 80.0% operated other passenger vehicles, while 51.7% 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, 2013*

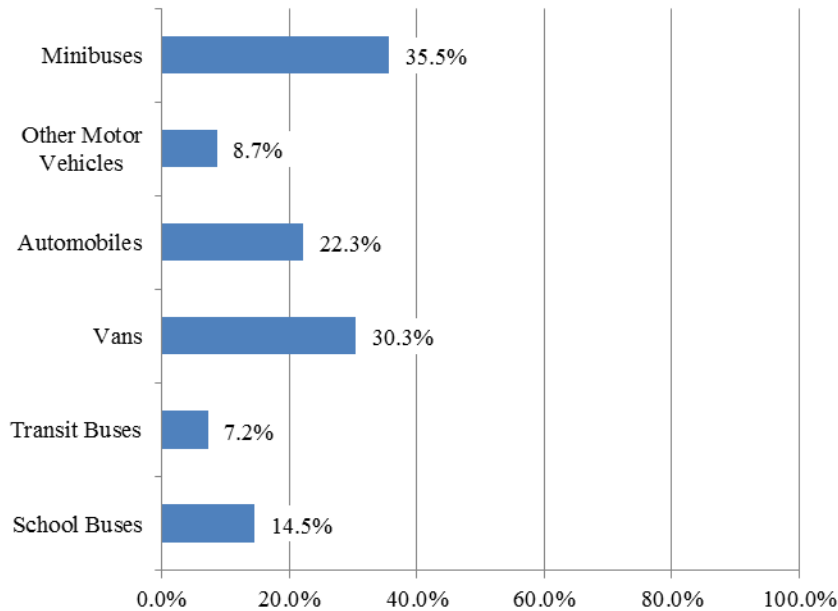
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Of all reporting motorcoach companies, 35.5% operated mini-buses, while 14.5% operated school buses, 7.2% operated transit buses, 30.3% operated vans, 22.3% operated automobiles, and 8.7% operated other motor vehicles.

**Figure 3-3**  
*Percentage of Reporting Carriers Operating Other Vehicles by Type, 2013*

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Sixty percent of companies that operated 100 or more motorcoaches reported operating automobiles, and sixty percent reported operating vans. Half of these large companies operated minibuses. Large companies with more than 100 motorcoaches were the most likely to operate transit buses or school buses. Three in ten large companies operated school buses, and three in ten operated transit buses.

Half of motorcoach companies operating between 50 and 99 motorcoaches reported operating vans, and half reported operating minibuses. Three out of eight operated automobiles, more than one in five operated school buses, and just over one in five reported operating transit buses.

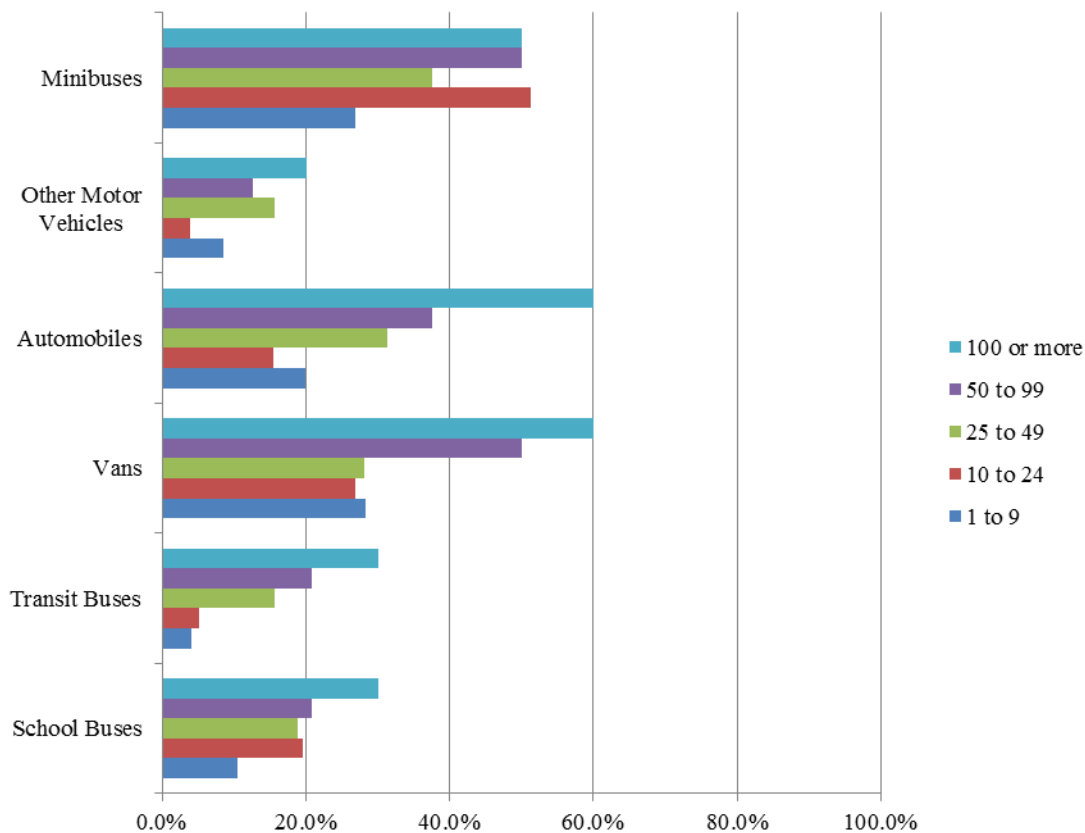
Companies that operated between 25 and 49 motorcoaches were most likely to operate minibuses. Three in eight companies with this fleet size reported operating minibuses. They were least likely to operate transit buses – fewer than one of every six companies with this fleet size reported operating transit buses.

Meanwhile, of all reporting companies with a fleet size of 10 to 24, slightly more than one in two reported operating minibuses. Just over one quarter of these companies operated vans, and just under 20% operated school buses.

Companies that operated nine or fewer motorcoaches were most likely to also operate vans (30%), and just over 25% reported operating minibuses. These companies were the least likely to operate transit buses of all the fleet size categories – just one in 25 companies reported operating transit buses in addition to traditional motorcoaches.

**Figure 3-4**

*Percentage of Reporting Carriers Operating Other Vehicles by Type by Fleet Size, 2013*



## 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 3,623 to 3,471, due to mergers, companies going out of business, and companies discontinuing motorcoach service. From 2012 to 2013, passenger trips declined by 5.1%, fuel consumed declined by 10.7%, and miles traveled declined by 10.4%.

The demographics of passengers changed slightly over the three years. Seniors increased as a percentage of ridership from 26.1% in 2012 to 28.3% in 2013. As a percentage of ridership, students fell slightly, from 24.1% in 2012 to 21.0% in 2013.

**Table 4-1**

*Overview of the Motorcoach Industry, 2011-2013*

	2011	2012	% change	2013	% change
<b>Overview</b>					
US Carriers	3,648	3,623	-0.7%	3,471	-4.2%
US Motorcoaches	36,017	35,354	-1.8%	32,811	-7.2%
Canada Carriers	336	331	-1.5%	330	-0.3%
Canada Motorcoaches	4,124	4,253	3.1%	4,092	-3.8%
Total Carriers	3,984	3,954	-0.8%	3,801	-3.9%
Total Motorcoaches	40,141	39,607	-1.3%	36,903	-6.8%
<b>Industry Activity</b>					
Passenger Trips	626,989,000	637,442,000	1.7%	605,084,000	-5.1%
Passenger Miles	76,165,114,000	75,748,927,000	-0.5%	63,092,552,000	-16.7%
Miles Traveled	2,171,071,000	2,077,293,000	-4.3%	1,860,710,000	-10.4%
Service miles	2,015,082,000	1,926,818,000	-4.4%	1,676,709,000	-13.0%
Fuel consumed (gallons)	344,977,000	340,150,000	-1.4%	303,629,000	-10.7%
Employment	135,100	132,900	-1.7%	133,200	0.3%
<b>Operating Ratios</b>					
passenger trips per motorcoach	15,600	16,100	3.0%	16,400	1.9%
passenger miles per motorcoach	1,897,400	1,912,500	0.8%	1,710,000	-10.6%
miles traveled per motorcoach	54,100	52,400	-3.0%	50,400	-3.9%
service miles traveled per motorcoach	50,200	48,600	-3.1%	45,400	-6.7%
passengers per service mile	37.8	39.3	4.0%	37.6	-4.3%
miles per gallon of fuel	6.3	6.1	-3.0%	6.1	0.3%
passenger miles per gallon of fuel	220.8	222.7	0.9%	207.8	-6.7%
employment per motorcoach	3.4	3.4	-0.3%	3.6	7.6%
<b>Demographics</b>					
Students	25.2%	24.1%	-4.4%	21.0%	-12.8%
Senior	26.2%	26.1%	-0.7%	28.3%	8.6%
All Other	48.5%	49.9%	2.9%	50.7%	1.6%
<b>Average Passenger Loads</b>					
Charter Average Passengers	41.6	42.3	1.8%	40.9	-3.4%
Packaged Tour Average Passengers	41.1	41.3	0.4%	37.0	-10.3%
Sightseeing Average Passengers	39.6	40.1	1.1%	37.2	-7.3%
Fixed-Route Average Passengers	34.5	36.9	6.9%	35.2	-4.6%

The total number of motorcoach carriers in the United States declined from 3,954 in 2012 to 3,801 in 2013 – a decrease of 3.9%. Of the companies that went out of business, merged with other companies, or were acquired by larger companies, 143, or 95%, operated fewer than 10 motorcoaches.

**Table 4-2**

*The Motorcoach Industry by Size of Fleet – U.S. and Canada – 2011-2013*

Fleet Size	Total Carriers		
	2011	2012	2013
1 to 9	3,286	3,260	3,115
10 to 24	473	469	462
25 to 49	156	156	155
50 to 99	49	49	50
100 or more	20	20	19
Total	3,984	3,954	3,801

From 2012 to 2013, the industry decreased in size by 153 companies. Of the decline, 71.2% was due to companies going out of business, 18.3% was due to companies discontinuing motorcoach service, and 10.5% was due to mergers and acquisitions in the industry.

**Table 4-3**

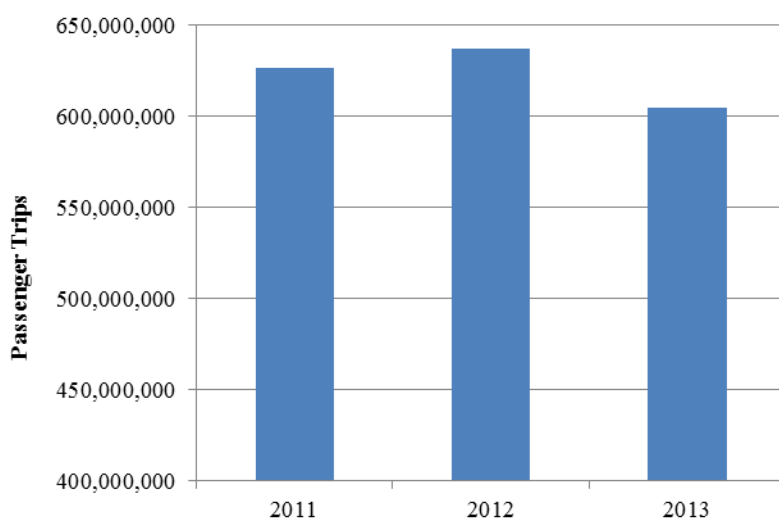
*Decreases in Total Companies in the Motorcoach Industry from 2012 to 2013 – U.S. and Canada*

	Decline from 2012	Percent
Discontinued Motorcoach Service	28	18.3%
Out of Business	109	71.2%
Sold or Merged	16	10.5%
Total Change	153	100.0%

Passenger trips increased from 627 million to 637 million in 2012, or 1.7% percent, and decreased from 637 million to 605 million in 2013, or 5.1%. The decrease in passenger trips can partially be explained by a decrease in average passenger load (see Figure 4-5).

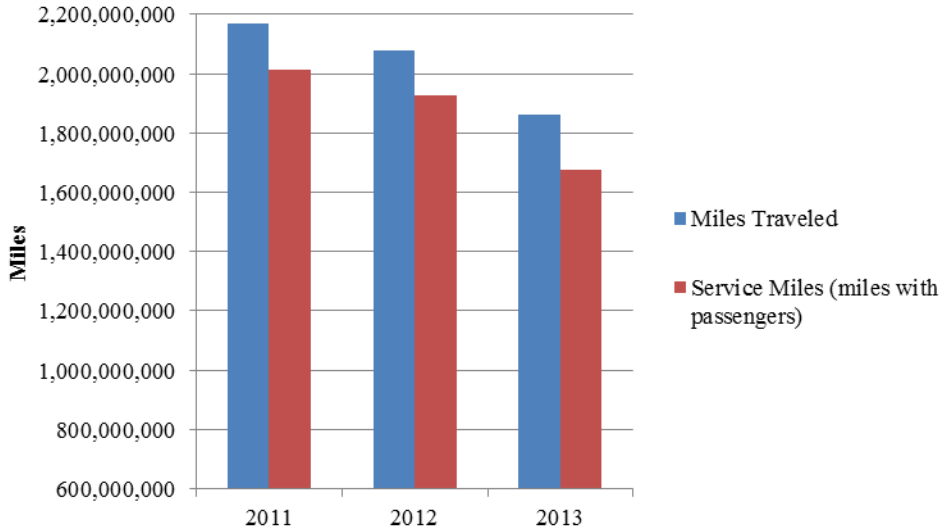
**Figure 4-1**

*Passenger Trips over Three Years*



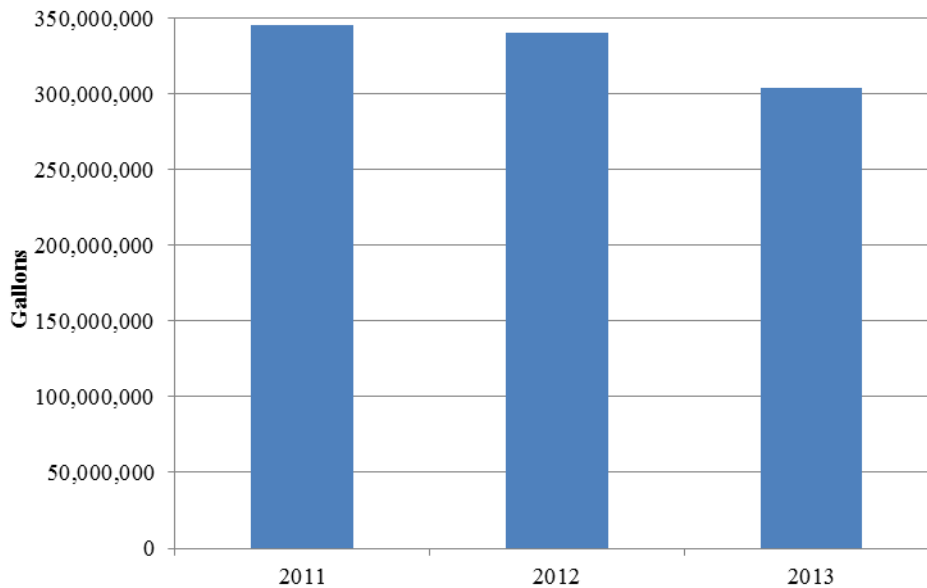
Service miles decreased from 2.015 billion to 1.927 billion in 2012, or 4.4%, and from 1.927 billion to 1.677 billion in 2013, or 13.0%.<sup>6</sup>

**Figure 4-2**  
*Mileage over Three Years*



Fuel consumption declined in conjunction with the slight decline in service miles. Fuel consumption decreased from 345.0 million gallons in 2011 to 340.2 million gallons in 2012, or 1.4% percent, and from 340.2 million gallons in 2012 to 303.6 million gallons in 2013, or 10.7%.

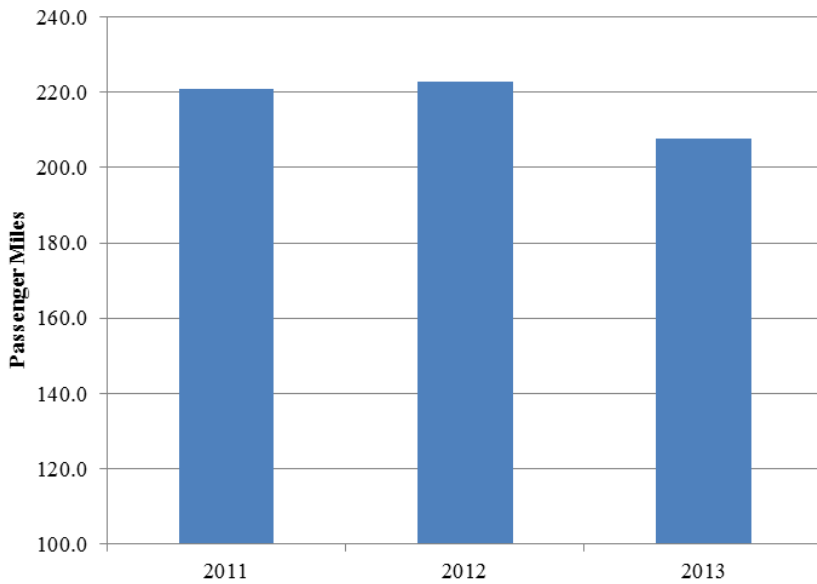
**Figure 4-3**  
*Fuel Consumed Over Three Years*



<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.

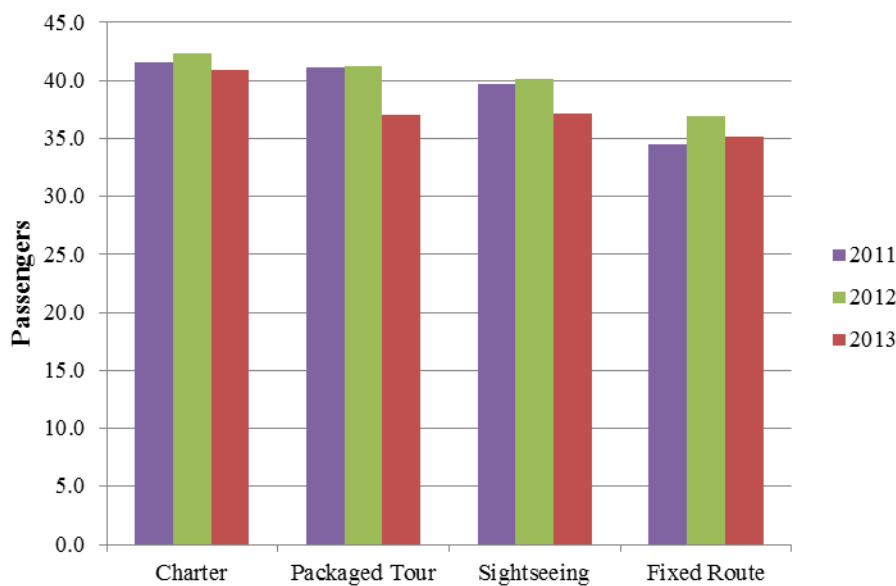
Passenger miles per gallon of fuel increased from 220.8 to 222.7 in 2012 – an increase of 0.9%. From 2012 to 2013, passenger miles decreased from 222.7 to 207.8 in 2012 – a decrease of 6.7%. The decline can be partially explained by a decrease in average passenger load (see Figure 4-5).

**Figure 4-4**  
*Passenger Miles per Gallon of Fuel over Three Years*



Decreases in passenger miles per gallon can be partially explained by decreases in average passenger load across all four types of service. Average charter load decreased slightly, from 42.3 in 2012 to 40.9 in 2013, or 3.4%. Fixed-route service saw the largest decrease in 2013, as average passenger load decreased from 36.9 in 2012 to 35.2, or 4.6%.

**Figure 4-5**  
*Average Passenger Load Over Three Years*



Despite the decreases in several metrics as explained in Figures 4-1 through 4-5, passenger trips per motorcoach increased in 2012 and 2013. From 2011 to 2012, passenger trips per motorcoach increased from 15,600 to 16,100, or 3.2%. Passenger trips per motorcoach also increased in 2012 to 2013, from 16,100 to 16,400, or 1.9%.

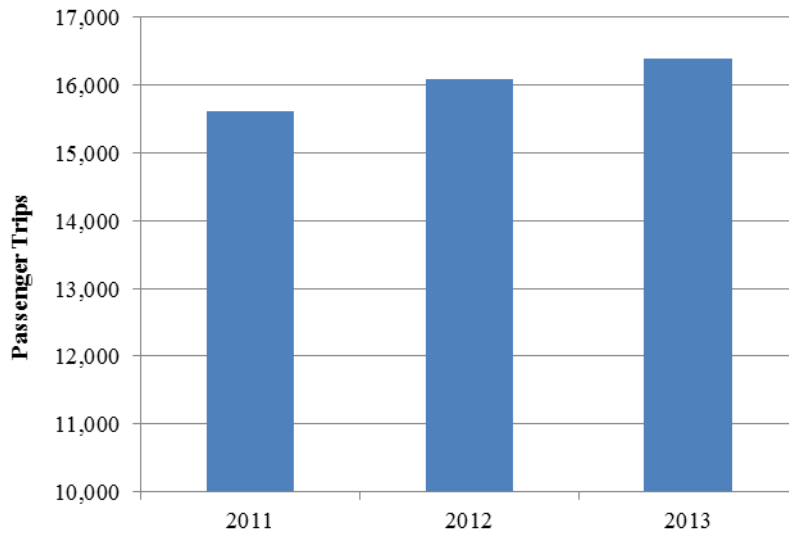
The simultaneous increase in passenger trips per motorcoach, and decrease in total industry passenger trips, can be explained by an increase in overall motorcoach trips. In other words, even though the average motorcoach load may have decreased from 2012 to 2013, the average motorcoach completed more trips in 2013 with this reduced load.

An increase in the number of trips per coach could be the result of motorcoach companies increasing logistical efficiency in order to increase the productivity of their motorcoach fleets.

**Figure 4-6**

*Passenger Trips per Motorcoach over Three Years*

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# Appendix A. Study Methodology

The American Bus Association Foundation (ABAF) commissioned *Motorcoach Census 2014* 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 2013. 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 was the motorcoach transportation service industry in the United States and Canada in 2013.

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 on motorcoaches. The industry excludes, however, 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 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 (JDA) 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, doing business as 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 motorcoaches 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 over 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 and bad 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 2013, there were 3,471 companies operating in the United States and 330 operating in Canada, for a total of 3,801 companies. This is 3.9% fewer companies than in 2012.

## Survey Data Collection and Processing

Survey questionnaires with cover letters from 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 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 for 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. The final survey database contained usable responses from 407 motorcoach carriers. Table A-3 presents the sample sizes realized from the returns to the *Motorcoach Census 2014* survey of motorcoach carriers.

**Table A-1***Sample Sizes Realized from Returns to the Survey of Motorcoach Carriers for Data Items Applicable to All Carriers*

	Motorcoach Fleet Size					Total
	1 to 9	10 to 24	25 to 49	50 to 49	100 or More	
<i>Number of carriers reporting information</i>						
Total reporting	236	97	34	27	13	407
Employment	215	93	33	21	10	372
Motorcoaches	236	97	34	27	13	407
Fuel	185	63	30	21	9	308
Mileage	185	73	30	21	9	318
Mileage by Service	225	84	33	24	11	377
Passengers by Service	215	83	33	25	11	367
Year Founded	231	97	33	23	11	384
Leased/Purchased Motorcoaches	233	92	34	24	10	383
Wholesale/Retail Gasoline	222	86	32	24	9	364
Other Vehicles	201	78	32	24	10	335
Passenger Demographics	184	67	26	15	8	292

Overall, the margin of error for the survey is 4.59% at a 95% confidence interval.

### **Estimating the Size of the Motorcoach Industry in 2013**

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 1,129 companies. The 1,129 companies identified by JDA operated 18,829 motorcoaches in 2013. JDA also identified and targeted the largest companies to verify the exact number of companies (19) that operated over 100 motorcoaches in 2013. JDA kept the number of companies with over 100 motorcoaches constant at 19 and estimated the distribution of the remaining companies in accordance with the observed results.

### **Estimating Motorcoach Industry Activity in 2013**

To estimate a population total for the activity of the motorcoach industry, JDA calculated sample totals for the types of activity measured (passenger trips, mileage, fuel consumed, and employment). Then, JDA 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.