

Motorcoach Census

A Study of the Size and Activity of the
Motorcoach Industry in the United States and Canada in 2017



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Prepared for the American Bus Association Foundation
by John Dunham & Associates
June 5, 2019

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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 2017. The study provides information on the scope and impact of the motorcoach industry that builds upon earlier census research.

In 2017, the motorcoach industry in the United States and Canada consisted of 3,196 companies that operated 37,264 motorcoaches. In the United States, 2,963 companies operated 32,920 motorcoaches, and in Canada 233 companies operated 4,344 motorcoaches.

Passenger Trips – The motorcoach industry provided 574.6 million passenger trips in 2017. About 69.3% of these trips were provided by large companies that operated 100 or more motorcoaches, 15.3% by mid-size companies operating 25 to 99 motorcoaches and 15.5% by small companies operating fewer than 25 motorcoaches. The industry moved individual passengers a total of 64.3 billion miles in 2017.

Services – Motorcoach companies offer a diverse variety of services. About 96.0% of motorcoach companies provided charter service in 2017, 34.8% provided tour service, 20.3% provided sightseeing, 22.3% provided scheduled service, and 10.1% provided commuter services.

Companies – The majority (94%) of companies were small, and operated fewer than 25 motorcoaches. All told, these firms operated 21,875 motorcoaches, provided 88.8 million passenger trips, and accounted for 47.4% of motorcoach mileage. Mid-sized companies, those that operated 25 to 99 motorcoaches, ran 6,604 motorcoaches, provided 87.6 million passenger trips, and accounted for 26.8% of the industry’s motorcoach mileage. Large companies that operated over 100 motorcoaches accounted for 24% of the industry’s fleet, provided 69.3% of the industry’s passenger trips, and 25.8% of the industry’s motorcoach mileage.

Employment – The motorcoach industry provided jobs to 98,500 people in 2017. On average, a motorcoach company provided 31 jobs or 2.6 jobs per motorcoach. Small companies – those that operated fewer than 25 motorcoaches – provided for 44.8% of motorcoach industry jobs. Mid-sized companies – those that operated between 25 and 99 motorcoaches – provided for 16.2% of motorcoach industry jobs. Large companies – those that operated more than 100 motorcoaches – provided for 38.9% of motorcoach industry jobs.¹

Fuel Efficiency – Considering the amount of passengers served per bus, motorcoaches move people with remarkable fuel efficiency. In 2017, the average fuel efficiency of a motorcoach was 6.4 miles per gallon of fuel. With this fuel efficiency, a motorcoach carrying the industry average of 43.7 passengers achieved 280.1 passenger miles per gallon of fuel in 2017.

Motorcoach Use – On average, a motorcoach provided 15,418 passenger trips in 2017, provided 1.7 million passenger miles, employed 2.6 people, used 6,160 gallons of fuel, and traveled 39,506 miles. 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 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 scheduled and commuter services, which are essential components of the passenger transportation systems in both the United States and Canada.

¹ This figure may differ from that provided by the “The Economic Impact of the Motorcoach and Group Travel Industry” due to differences in the types of service modeled in the two analyses.
See: “The Economic Impact of the Motorcoach and Group Travel Industry,” John Dunham & Associates, 2018. Available at: <https://www.buses.org/aba-foundation/research-summary/economic-impact/motorcoach-economic-impact-study>

Selected Results of *Motorcoach Census*

1. Size of the Motorcoach Industry in the United States and Canada in 2017

United States:

Motorcoach carriers..... 2,963
Motorcoaches 32,920

Canada:

Motorcoach carriers..... 233
Motorcoaches 4,344

Total:

Motorcoach carriers..... 3,196
Motorcoaches 37,264

2. Motorcoach Industry Activity in the United States and Canada in 2017

Passenger trips..... 574.6 million
Passenger miles 64.3 billion
Miles traveled..... 1.5 billion
Fuel consumed (gallons)..... 229.6 million
Employment 98,500

3. Motorcoach Operating Ratios for 2017

Passenger trips per motorcoach 15,418
Passenger miles per motorcoach..... 1.7 million
Miles traveled per motorcoach 39,506
Miles per gallon of fuel 6.4
Passenger miles per gallon of fuel 280.1
Employment per motorcoach 2.6

1. Introduction

Motorcoach Census 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 2017.

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, Infogroup LLC, 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 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. We acknowledge and thank them for their support. We are particularly grateful to the 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 2017. 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.

Overall, the analysis is based on data that are statistically significant to the 95 percent level; however, individual size and service breaks are statistically significant only at the 90 percent level. This is the first time that *Motorcoach Census* has had this degree of statistical accuracy. This should be considered when analyzing changes from year to year, as they are likely quite variable.

Any errors in the aggregation and presentation are our own.

2. Size and Activity of the Motorcoach Industry in 2017

Motorcoach Census reports estimates of the size and activity of the motorcoach transportation services industry in the United States and Canada in calendar year 2017. 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 2017, the motorcoach industry in the United States and Canada consisted of 3,196 carriers and 37,264 motorcoaches (Table 2-1). In the United States, 2,963 carriers operated 32,920 motorcoaches and, in Canada, 233 carriers operated 4,344 motorcoaches. The average carrier operated 12 motorcoaches.

Table 2-1
Total Carriers and Motorcoaches in 2017 by Fleet Size

Motorcoach Fleet Size	Carriers		Motorcoaches		Average Number of Motorcoaches	Motorcoaches by Capacity (Passengers)	
	Number	Percent	Number	Percent		30 to 45	Over 46
100 or more	20	1%	8,785	24%	439	1,353	6,168
50 to 99	66	2%	3,626	10%	55	270	3,079
25 to 49	104	3%	2,979	8%	29	230	2,160
10 to 24	385	12%	5,594	15%	15	500	4,559
1 to 9	2,621	82%	16,280	44%	6	4,864	9,426
Industry Total	3,196	100%	37,264	100%	12	7,217	25,391

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

Since JDA began conducting the Census, the number of companies has fallen considerably. This year, we estimate that total US companies have fallen by 27 and Canadian companies actually increased by 35 mostly due to better data sourcing.² At the same time, the number of coaches in the overall market has been fairly consistent. There were a total of 39,607 motorcoaches operating in 2012, and 37,264 operating in 2017, a change of 5.9% over the course of 5 years.

Passenger Trips

The motorcoach industry in the United States and Canada provided 574.6 million passenger trips in 2017 (Table 2-2). The average carrier provided 179,772 passenger trips and an average motorcoach provided 15,418 passenger trips.

The largest carriers (100 or more motorcoaches) provided 398.1 million passenger trips and accounted for 69.3% of passenger trips in 2017, which, on average, amounts to 19.9 million passenger trips per carrier. Motorcoaches operated by large carriers provided an average of 45,314 passenger trips per motorcoach in 2017. The smallest carriers with fewer than 10 motorcoaches provided 9.6% of industry passenger trips, which is, on average, 21,018 passenger trips per carrier and 3,384 passenger trips per motorcoach.

² Note that the change in Canadian data are in line with overall changes in motorcoach numbers as reported by Statistics Canada.

Table 2-2*Motorcoach Passenger Trips in 2017 by Fleet Size*

Motorcoach Fleet Size	Passenger Trips		Average Passenger Trips per:	
	Total	Percent	Motorcoach	Carrier
100 or more	398,085,000	69.3%	45,314	19,904,251
50 to 99	31,373,100	5.5%	8,653	475,349
25 to 49	56,269,900	9.8%	18,891	541,057
10 to 24	33,736,400	5.9%	6,031	87,627
1 to 9	55,087,900	9.6%	3,384	21,018
Industry Total	574,552,300	100.0%	15,418	179,772

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 64.3 billion passenger miles in 2017 (Table 2-3). On average, each carrier generated 20.1 million passenger miles and each motorcoach generated 1.7 million passenger miles.

Table 2-3*Motorcoach Passenger Miles in 2017 by Fleet Size*

Motorcoach Fleet Size	Passengers Miles		Average Passenger Miles per:	
	Number	Percent	Motorcoach	Carrier
100 or more	16,590,252,300	25.8%	1,888,449	829,512,617
50 to 99	10,923,029,600	17.0%	3,012,780	165,500,448
25 to 49	6,301,556,400	9.8%	2,115,610	60,591,889
10 to 24	13,806,568,500	21.5%	2,467,985	35,861,217
1 to 9	16,677,533,100	25.9%	1,024,391	6,363,042
Industry Total	64,298,939,900	100.0%	1,725,498	20,118,567

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

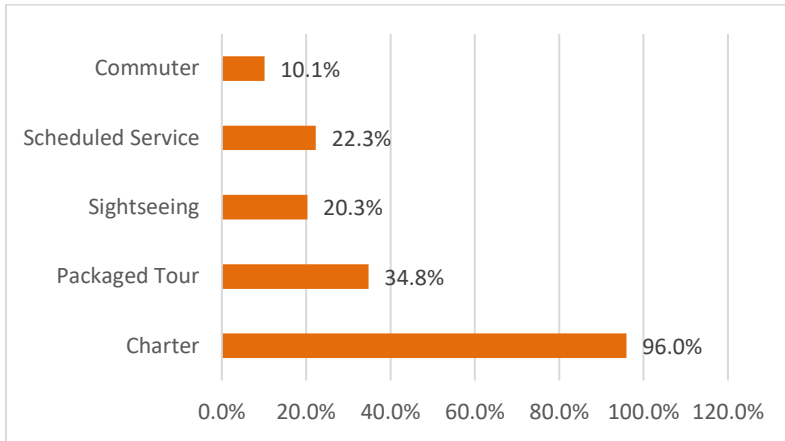
The largest carriers (100 or more motorcoaches) accounted for about 25.8% of industry passenger miles. On average, a large carrier accounted for 829.5 million passenger miles, or 1.9 million passenger miles per motorcoach; the largest of any fleet-size category.

The smallest carriers, those with a fleet size of fewer than 10 motorcoaches, operated the smallest average number (16.7 billion) of passenger miles per motorcoach. They averaged 6.4 million passenger miles per carrier for a total of 16.7 billion passenger miles, or 25.9% of industry passenger miles.

Services Provided

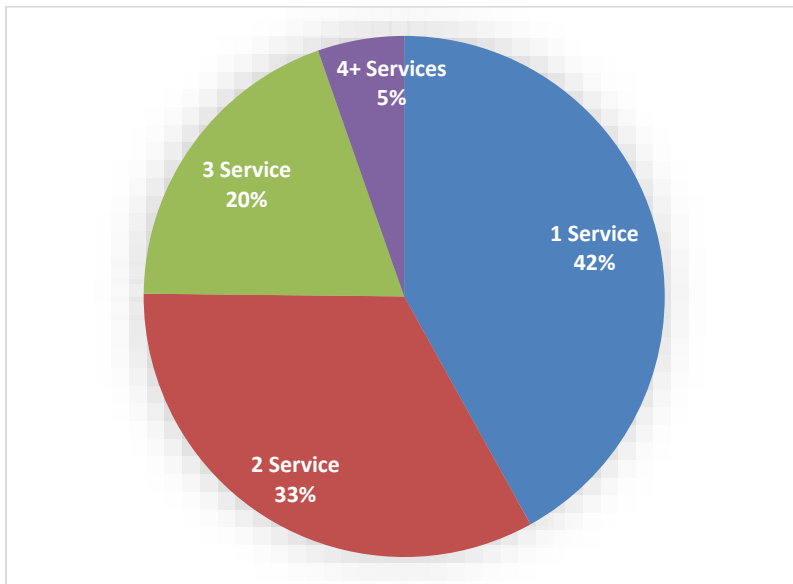
The services offered by the motorcoach industry are diverse. Many carriers offered multiple types of service. Nearly all carriers (96.9) provided charter service in 2017, followed by tour (35.2), scheduled service (22.5), sightseeing (20.5), and commuter service (10.2).

Figure 2-1
Percentage of Carriers Providing Types of Service in 2017



In 2017, 58.1 of carriers provided more than one service. Approximately (41.9) carriers had mileage in 2017 for just one service, 33.2 offered two services, 19.5 offered three services, 4.4 offered four services, and 1.0 offered five or more services.

Figure 2-2
Percentage of Carriers by Number of Services Provided in 2017



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

Vehicle Mileage

Industry motorcoaches traveled 1.5 billion miles in 2017, averaging 460,618 miles per carrier and 39,506 miles per motorcoach. The largest carriers with over 100 motorcoaches averaged 43,236 miles per motorcoach, while the smallest carriers – those with fewer than 10 motorcoaches – averaged 23,454 miles per motorcoach.

Table 2-4*Motorcoach Vehicle Mileage in 2017 by Fleet Size*

Motorcoach Fleet Size	Vehicle Mileage		Average Vehicle Mileage per:	
	Number	Percent	Motorcoach	Carrier
100 or more	379,836,600	25.8%	43,236	18,991,828
50 to 99	250,084,600	17.0%	68,978	3,789,160
25 to 49	144,275,200	9.8%	48,437	1,387,261
10 to 24	316,103,700	21.5%	56,505	821,048
1 to 9	381,834,900	25.9%	23,454	145,683
Industry Total	1,472,135,000	100.0%	39,506	460,618

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

Fuel Consumption

Industry motorcoaches consumed 229.6 million gallons of fuel in 2017. Each carrier, on average, consumed 71,824 gallons of fuel, or 6,160 gallons per motorcoach. Motorcoach fuel efficiency averaged 6.4 miles per gallon. With this fuel efficiency, a motorcoach carrying the industry average of 43.7 passengers achieved 280.1 passenger miles per gallon in 2017.

Table 2-5*Motorcoach Fuel Consumption in 2017 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	65,481,500	28.5%	7,454	3,274,075	5.8
50-99	40,767,400	17.8%	11,244	617,687	6.1
25 to 49	24,265,500	10.6%	8,147	233,322	5.9
10 to 24	41,643,900	18.1%	7,444	108,166	7.6
1 to 9	57,391,800	25.0%	3,525	21,897	6.7
Industry Total	229,550,100	100.0%	6,160	71,824	6.4

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

Employment

The motorcoach industry in the United States and Canada employed 98,500 people in 2017, averaging 31 employees per carrier and 2.6 employees per motorcoach (Table 2-6). The largest carriers with over 100 motorcoaches averaged 1,918 employees per carrier and 4.4 employees per motorcoach, while the smallest carriers with fewer than 10 motorcoaches averaged 11 employees per company and 1.8 employees per motorcoach.³

³ This figure may differ from that provided by the “The Economic Impact of the Motorcoach and Group Travel Industry” due to differences in the types of service modeled in the two analyses.
See: “The Economic Impact of the Motorcoach and Group Travel Industry,” John Dunham & Associates, 2018. Available at: <https://www.buses.org/aba-foundation/research-summary/economic-impact/motorcoach-economic-impact-study>

Table 2-6*Motorcoach Carrier Employment in 2017 by Fleet Size*

Motorcoach Fleet Size	Employment		Average Employment per:	
	Total	Percent	Motorcoach	Carrier
100 or more	38,400	38.9%	4.4	1,918
50 to 99	8,100	8.2%	2.2	122
25 to 49	7,900	8.0%	2.7	76
10 to 24	14,100	14.4%	2.5	37
1 to 9	30,000	30.5%	1.8	11
Industry Total	98,500	100.0%	2.6	31

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

3. 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 rose slightly from 3,188 to 3,196, due mainly to improved data. From 2015 to 2017, passenger trips declined by 3.7%, reported fuel consumed declined by 38.6%, and miles traveled declined by 25.0%. Note that survey data are not adjusted and major shifts can occur due to the low level of statistical significance in prior years. Data were collected in 2016; however, the participation rate was too small to produce meaningful statistics.

Table 3-1
Overview of the Motorcoach Industry, 2015-2017

	2015	2017	% change
Overview			
US Carriers	2,990	2,963	-0.90%
US Motorcoaches	34,885	32,920	-5.63%
Canada Carriers	274	233	-14.96%
Canada Motorcoaches	3,835	4,344	13.27%
Total Carriers	3,264	3,196	-2.08%
Total Motorcoaches	38,720	37,264	-3.76%
Industry Activity			
Passenger Trips	596,444,300	574,552,300	-3.67%
Passenger Miles	69,637,520,400	64,298,939,900	-7.67%
Miles Traveled	1,963,813,700	1,472,135,000	-25.04%
Fuel consumed (gallons)	374,075,800	229,550,100	-38.64%
Employment	112,702	98,500	-12.60%
Operating Ratios			
passenger trips per motorcoach	15,404	15,418	0.09%
passenger miles per motorcoach	1,798,487	1,725,498	-4.06%
miles traveled per motorcoach	38,385	39,506	2.92%
miles per gallon of fuel	4.0	6.4	60.00%
passenger miles per gallon of fuel	186	280.1	50.59%
employment per motorcoach	2.9	2.6	-10.34%
Average Passenger Loads			
Charter Average Passengers	38	38	0.00%
Packaged Tour Average Passengers	39	29	-25.64%
Sightseeing Average Passengers	34	34	0.00%
Fixed-Route Average Passengers	36	45	25.00%

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 2017. 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 2017.

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.
- **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.

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

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
- Infogroup LLC
- U.S. Department of Transportation

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 2017, there were 2,963 companies operating in the United States and 233 operating in Canada, for a total of 3,196 companies. This is 8 more companies than were reported in in 2016.

Table A-1

The Motorcoach Industry by Size of Fleet – U.S. and Canada – 2015-2017

Fleet Size	Total Carriers			Responses	2017	
	2015	2016	2017		Significance Level	Confidence Interval
1 to 9	2,665	2,612	2,621	106	10%	+/-6.26
10 to 24	395	381	385	88	10%	+/-6.17
25 to 49	113	110	104	51	10%	+/-6.61
50 to 99	69	61	66	38	10%	+/-7.01
100 or more	22	24	20	16	10%	+/-7.55
Total	3,264	3,188	3,196	299	5%	+/-5.40

The motorcoach industry experienced a decline in the number of companies due to mergers and acquisitions, companies going out of business, and companies discontinuing motorcoach service. From 2015 to 2017, the industry decreased in size by 68 companies.

Survey Data Collection and Processing

Online survey questionnaires with cover letters from the ABA were sent electronically 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 motorcoach carriers. Table A-3 presents the sample sizes realized from the returns to the *Motorcoach Census* survey of motorcoach carriers.

Estimating the Size of the Motorcoach Industry in 2017

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. In all, JDA identified a total of 3,189 motorcoach companies operating in the United States and Canada (not including subsidiaries of larger entities). These companies operated throughout a total of 4,650 separate facilities.

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 all but 31 of the companies, either through Infogroup data, FMCSA data, survey response, phone calls, or company websites.

Estimating Motorcoach Industry Activity in 2017

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.