



MOTORCOACH CENSUS 2024

A STUDY OF THE SIZE AND ACTIVITY OF THE
MOTORCOACH INDUSTRY IN THE UNITED
STATES AND CANADA

AUGUST 2024

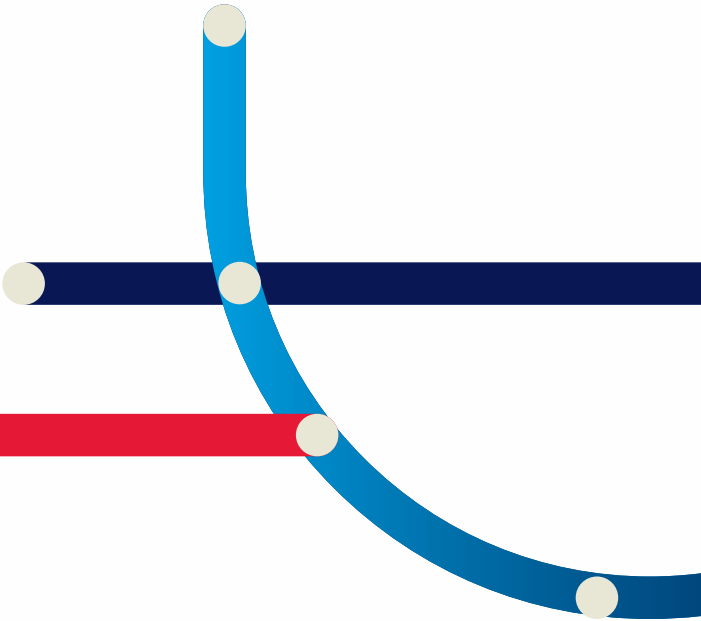






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RESEARCH OVERVIEW

The 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 the calendar year 2023.

Industry size is measured by the number of motorcoach carriers and the number of motorcoaches they operate. Activity is measured by the number of passenger miles driven, services provided, motorcoach miles traveled, and employment.

Definition of the Motorcoach Industry

For this research, the Motorcoach Industry is defined as:

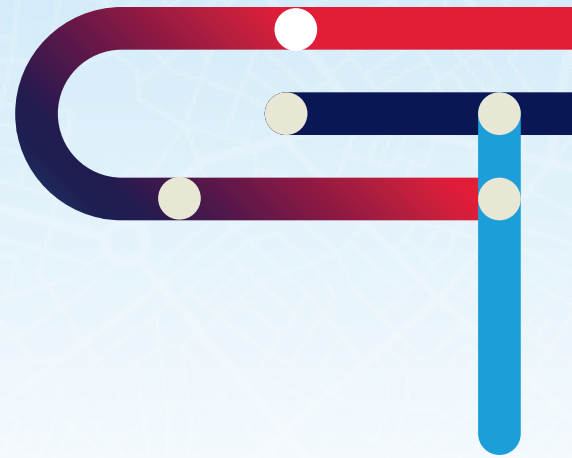
Private-sector organizations that lease/own and operate motorcoaches and offer motorcoach transportation services to the public, including private and public sector organizations, on a contract basis.

- This includes motorcoach transportation companies hired on a contract basis by state or city transit authorities to transport commuters.
- Excludes governments, transit agencies, or other public-sector organizations that lease/own and operate motorcoaches and offer transportation services to the public.
- Excludes private-and public-sector organizations that lease/own and operate motorcoaches for their 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 30 feet in length. This definition closely matches the definition of an OTRB written into U.S. law: “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

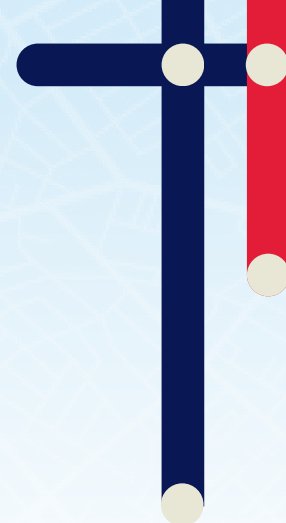
Several sources of information were used to construct estimates of industry size and activity for this study. Names of potential motorcoach carriers were assembled using information from the American Bus Association Foundation, Dun and Bradstreet, the U.S. Department of Transportation, and Motor Coach Canada. Information about the potential motorcoach carriers and the motorcoaches that they operated was collected through a survey. The survey questionnaire was distributed to motorcoach carriers. A total of 291 usable survey responses from motorcoach carriers were returned to Tourism Economics.

This report presents industry estimates of size and activity in Section 2 and other statistics on motorcoach carrier characteristics in Section 3 for the motorcoach transportation services industry in the United States and Canada in 2023. The appendix describes the study methodology.

Disclaimers

Tourism Economics prepared this analysis based on individual company responses to a survey. Our role was to aggregate the data to present an overview of the motorcoach industry in the United States and Canada while maintaining the confidentiality of the individual respondent's information.

Any errors in the aggregation and presentation are our own.



KEY FINDINGS

SELECTED RESULTS FROM THE 2023 MOTORCOACH CENSUS

In 2023, the motorcoach industry in the United States and Canada comprised 1,984 companies that operated 47,946 motorcoaches. In the United States, 1,859 companies operated 46,751 motorcoaches; in Canada, 125 companies operated 1,195 motorcoaches.

Services

Motorcoach companies offer a wide range of services. In 2023, about 90.0% of motorcoach companies provided charter service, 31.6% provided tour service, 26.5% provided sightseeing, 11.7% provided urban scheduled service, 13.1% provided rural scheduled service, and 11.3% provided commuter services.

Companies

Most companies (89.6%) were small and operated fewer than 25 motorcoaches. These firms operated 12,483 motorcoaches and accounted for 37.0% of motorcoach mileage. Mid-sized companies that operated 25 to 99 motorcoaches ran 7,017 motorcoaches, accounting for 25.6% of the industry's motorcoach mileage. Large companies that operated over 100 motorcoaches accounted for 59.3% of the industry's fleet and 37.4% of the industry's motorcoach mileage.

Employment

The motorcoach industry provided jobs to 76,949 people in 2023. On average, a motorcoach company provided 39 jobs or 1.6 jobs per motorcoach. Small companies that operated fewer than 25 motorcoaches accounted for 29.0% of motorcoach industry jobs. Mid-sized companies – those that operated between 25 and 99 motorcoaches – provided for 18.7% of motorcoach industry jobs. Large companies that operated more

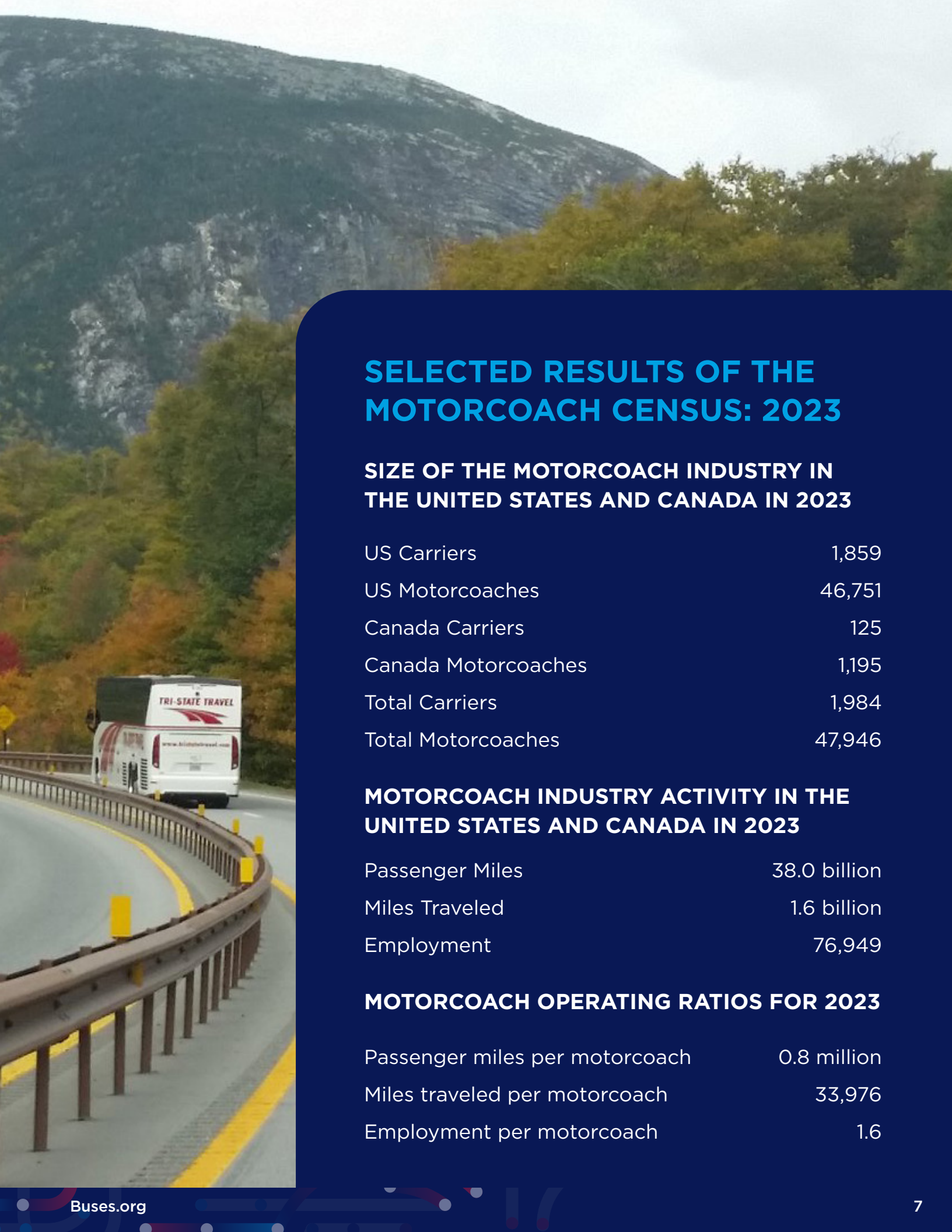
than 100 motorcoaches provided for 52.3% of motorcoach industry jobs.

Motorcoach Use

On average, a motorcoach provided 0.8 million passenger miles, employed 1.6 people and traveled 33,976 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 and moves people with great fuel efficiency. It shows an industry that provides charter, tour, and sightseeing services, which are vital 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 THE MOTORCOACH CENSUS: 2023

SIZE OF THE MOTORCOACH INDUSTRY IN THE UNITED STATES AND CANADA IN 2023

US Carriers	1,859
US Motorcoaches	46,751
Canada Carriers	125
Canada Motorcoaches	1,195
Total Carriers	1,984
Total Motorcoaches	47,946

MOTORCOACH INDUSTRY ACTIVITY IN THE UNITED STATES AND CANADA IN 2023

Passenger Miles	38.0 billion
Miles Traveled	1.6 billion
Employment	76,949

MOTORCOACH OPERATING RATIOS FOR 2023

Passenger miles per motorcoach	0.8 million
Miles traveled per motorcoach	33,976
Employment per motorcoach	1.6

SIZE AND ACTIVITY OF THE INDUSTRY

DETAILED RESULTS FROM THE 2023 MOTORCOACH CENSUS

The Motorcoach Census reports estimates of the size and activity of the motorcoach transportation services industry in the United States and Canada in the calendar year 2023. Industry size is measured by the number of motorcoach carriers and the number of motorcoaches they operate. Activity is measured by the number of passenger miles traveled, services provided, motorcoach miles traveled, and employment.

Size of the Motorcoach Industry

In 2023, the motorcoach industry in the United States and Canada comprised 1,984 carriers and 47,946 motorcoaches. In the United States, 1,859 carriers operated 46,751 motorcoaches; in Canada, 125 carriers operated 1,195 motorcoaches. The average carrier operated 24 motorcoaches.



TOTAL CARRIERS AND MOTORCOACHES IN 2023 BY FLEET SIZE

Motorcoach Fleet Size	Carriers		Motorcoaches		Average Number of Motorcoaches
	Number	Percent	Motorcoach	Carrier	
1-9 buses	1,513	76.2%	7,485	15.6%	5
10-24 buses	265	13.4%	4,998	10.4%	19
25-49 buses	89	4.5%	3,816	8.0%	43
50-99 buses	37	1.9%	3,202	6.7%	86
100+ buses	80	4.0%	28,446	59.3%	356
Industry Total	1,984	100.0%	47,946	100.0%	24

Passenger Miles

A passenger mile is defined as one person transported one mile. In 2023, the motorcoach industry in the United States and Canada provided 38.0 billion passenger miles. On average, each carrier generated 19.2 million passenger miles, and each motorcoach generated 0.8 million passenger miles.

The largest carriers (100 or more motorcoaches) accounted for 37.4% of industry passenger miles.

On average, a large carrier accounted for 177 million passenger miles or 0.5 million passenger miles per motorcoach.

The most minor carriers, those with fleets of fewer than 10 motorcoaches, operated the smallest average number of passenger miles per motorcoach. They averaged 5.1 million passenger miles per carrier for 7.8 billion or 20.4% of industry passenger miles.

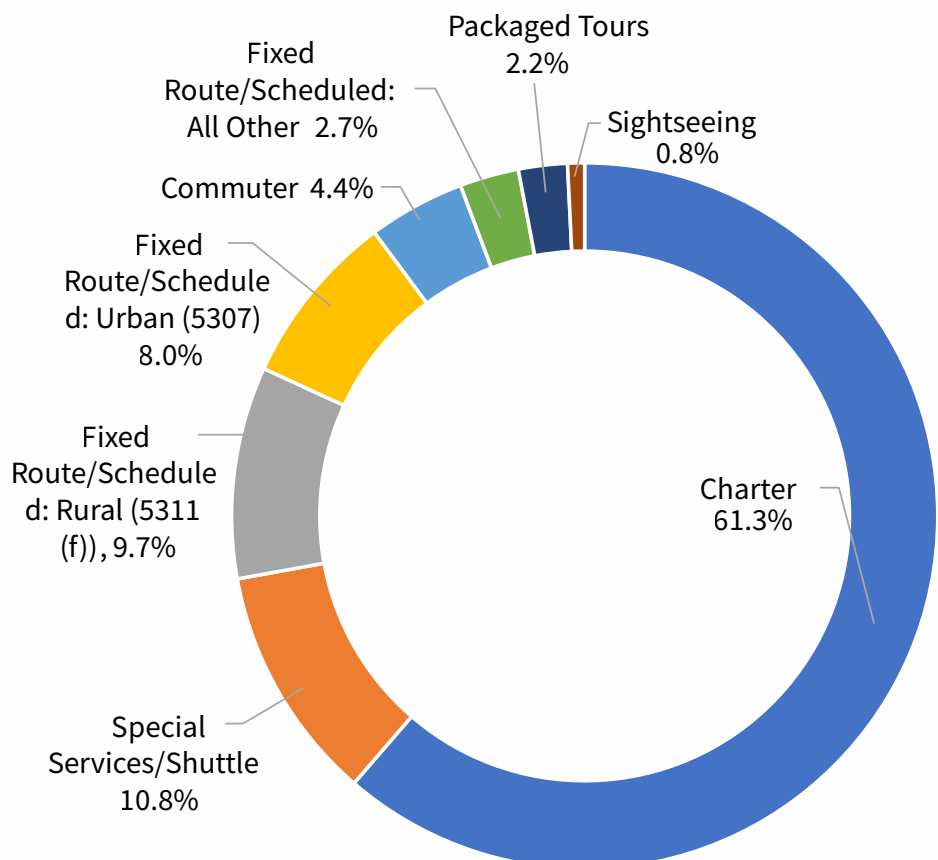
MOTORCOACH PASSENGER MILES IN 2023 BY FLEET SIZE

Motorcoach Fleet Size	Passenger Miles		Average Passenger Miles per:	
	Number	Percent	Motorcoach	Carrier
1-9 buses	7,764,420,758	20.4%	1,037,365	5,133,195
10-24 buses	6,316,011,993	16.6%	1,263,749	23,829,074
25-49 buses	4,938,836,445	13.0%	1,294,343	55,288,704
50-99 buses	4,786,872,247	12.6%	1,495,189	128,836,287
100+ buses	14,199,154,780	37.4%	499,159	177,489,435
Industry Total	38,005,296,223	100.0%	792,669	19,154,659

Trip Types

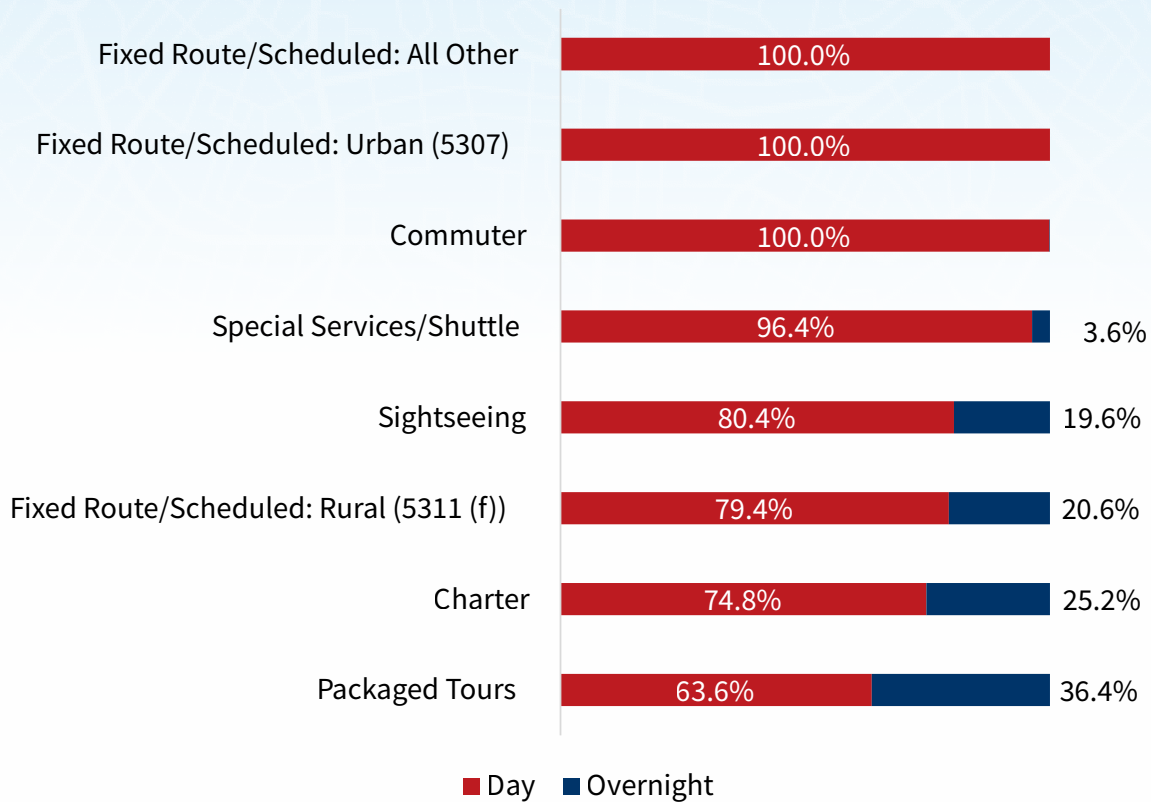
Charter trips constituted 61.3% of all trips in 2023, with the majority (74.8%) being day trips. Slightly more than one in 10 trips (10.8%) was a special services/shuttle trip, and almost all (96.4%) of these trips were day trips.

The highest percentage of overnight trips was for packaged tours, with 36.4% being overnight. Packaged tours constituted 2.2% of all trips.



SIZE AND ACTIVITY

MOTORCOACH TRIPS BY DETAILED TYPE OF SERVICE (PERCENT OF TRIPS)



Average Utilization Rate

Motorcoach utilization was highest for charter service at 66.0%. Among motorcoach carriers, it was highest for the smallest companies, at 70.4%. The utilization rate is lowest for packaged tours, with only a 20.7% utilization rate, however, it is most efficient for larger companies, at 53.5% for companies with 100 motorcoaches or more.

MOTORCOACH CARRIER UTILIZATION RATE IN 2023

Motorcoach Fleet Size	Charter	Packaged Tours	Fixed Route/Scheduled: Urban (5307)	Fixed Route/Scheduled: Rural (5311 (f))
1-9 buses	70.4%	22.6%	45.0%	51.8%
10-24 buses	64.1%	17.5%	62.3%	71.0%
25-49 buses	65.9%	12.7%	23.0%	7.5%
50-99 buses	59.4%	5.0%	38.0%	29.1%
100+ buses	48.8%	53.5%	65.0%	90.0%
Industry Total	66.0%	20.7%	48.6%	41.1%



	BY FLEET SIZE AND TYPE OF SERVICE			
	Fixed Route/ Scheduled: All Other	Sightseeing	Commuter	Special Services/ Shuttle
	44.0%	16.4%	22.0%	19.6%
	17.5%	26.7%	75.0%	26.1%
	3.0%	10.0%	20.0%	25.0%
	70.4%	44.0%	51.5%	51.3%
	80.0%	70.0%	65.0%	43.3%
	46.2%	23.0%	50.3%	26.1%



SIZE AND ACTIVITY

Employment

In the United States and Canada, the motorcoach industry employed 76,949 individuals in 2023, averaging 39 employees per carrier and 1.6 employees per motorcoach. The largest carriers with over 100 motorcoaches averaged 503 employees per carrier and 1.4 employees per motorcoach. Minor carriers with fewer than 10 motorcoaches averaged 10 employees per company and 1.9 employees per motorcoach.

MOTORCOACH CARRIER EMPLOYMENT IN 2023 BY FLEET SIZE

Motorcoach Fleet Size	Employment				Average Employment Mileage per:	
	Total	Full-time	Part-time	Percent	Motorcoach	Carrier
1-9 buses	14,423	4,769	9,654	18.7%	1.9	10
10-24 buses	7,879	3,781	4,098	10.2%	1.6	30
25-49 buses	10,719	7,750	2,969	13.9%	2.8	120
50-99 buses	3,662	1,992	1,670	4.8%	1.1	99
100+ buses	40,266	21,451	18,815	52.3%	1.4	503
Industry Total	76,949	39,743	37,205	100.0%	1.6	39



SIZE AND ACTIVITY

Future Plans

The 2023 Census asked companies to indicate if they would be acquiring or retiring coaches in 2024, and the means they would be using to acquire or eliminate.

PLANNED MOTORCOACH ACQUISITIONS BY FLEET SIZE (PERCENT OF COMPANIES)					
Motorcoach Fleet Size	Plans to Acquire	New Purchase	New Lease	Used Purchase	Used Lease
1-9 buses	30.4%	16.1%	0.9%	29.5%	6.3%
10-24 buses	34.2%	59.5%	8.1%	24.3%	0.0%
25-49 buses	16.5%	54.1%	13.5%	24.3%	2.7%
50-99 buses	13.3%	62.1%	3.4%	10.3%	0.0%
100+ buses	5.7%	50.0%	18.8%	18.8%	6.3%
Industry Total	54.3%	37.1%	5.5%	22.7%	3.1%

Over half of responding carriers indicated they would acquire motorcoaches in 2024, with more than a third purchasing new coaches and slightly less than a quarter purchasing used coaches. According to the survey results, leases seem to be an uncommon means of acquisition for carriers.

PLANNED MOTORCOACH ELIMINATIONS BY FLEET SIZE (PERCENT OF COMPANIES)				
Motorcoach Fleet Size	Plans to Eliminate	Selling coaches	Decommissioning	Trading-in to manufacturer
1-9 buses	25.7%	15.2%	7.1%	3.6%
10-24 buses	36.2%	37.8%	5.4%	14.9%
25-49 buses	18.1%	43.2%	8.1%	13.5%
50-99 buses	12.4%	27.6%	13.8%	13.8%
100+ buses	7.6%	37.5%	6.3%	18.8%
Industry Total	36.1%	25.8%	6.9%	9.3%

Slightly more than a third of responding carriers indicated they would be eliminating motorcoaches in 2024, with the most common acquisition method being selling motorcoaches.

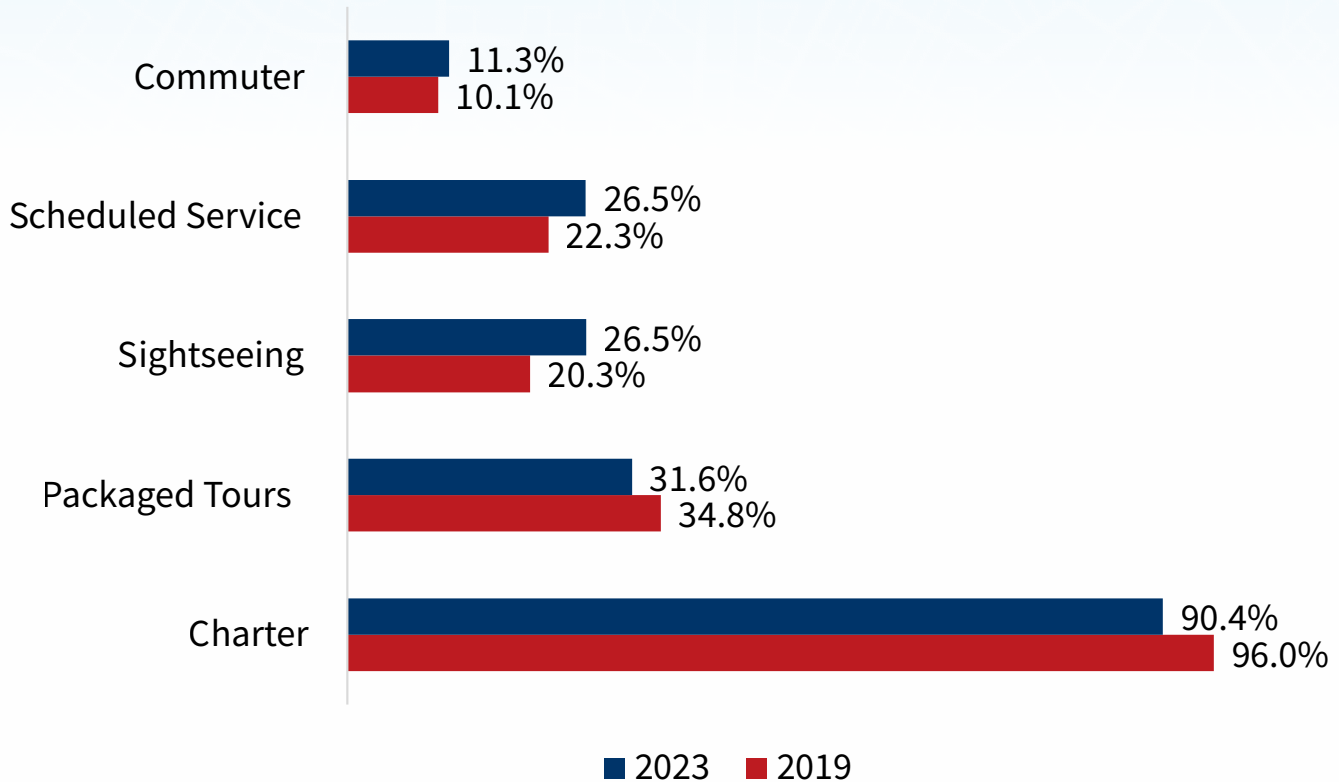


SIZE AND ACTIVITY

Services Provided

The motorcoach industry offers diverse services. Many carriers offer multiple types of service. According to the survey, nine in 10 carriers (90.4%) offered charter services, around four in 10 offered special services (39.5%), almost a third offered packaged tours (31.6%), and slightly more than a quarter offered sightseeing tours (26.5%).

MOTORCOACH TRIP TYPES BY SERVICE AND FLEET SIZE



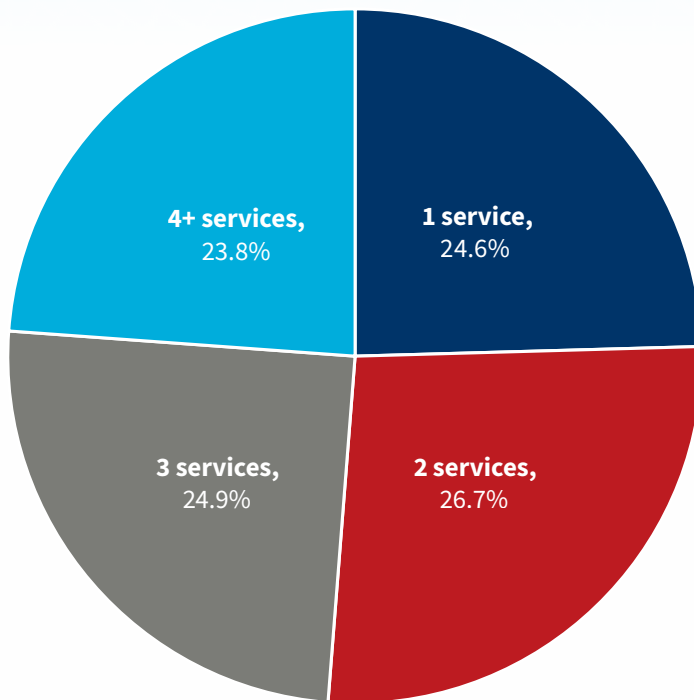
Comparing results to 2019, the data suggests that charter services—while being offered by most carriers—are becoming a less important part of the industry than in the past, as are packaged tours. Meanwhile, there seems to be an increase in demand for sightseeing, scheduled service, and commuter service.

MOTORCOACH TRIP TYPES BY SERVICE AND FLEET SIZE

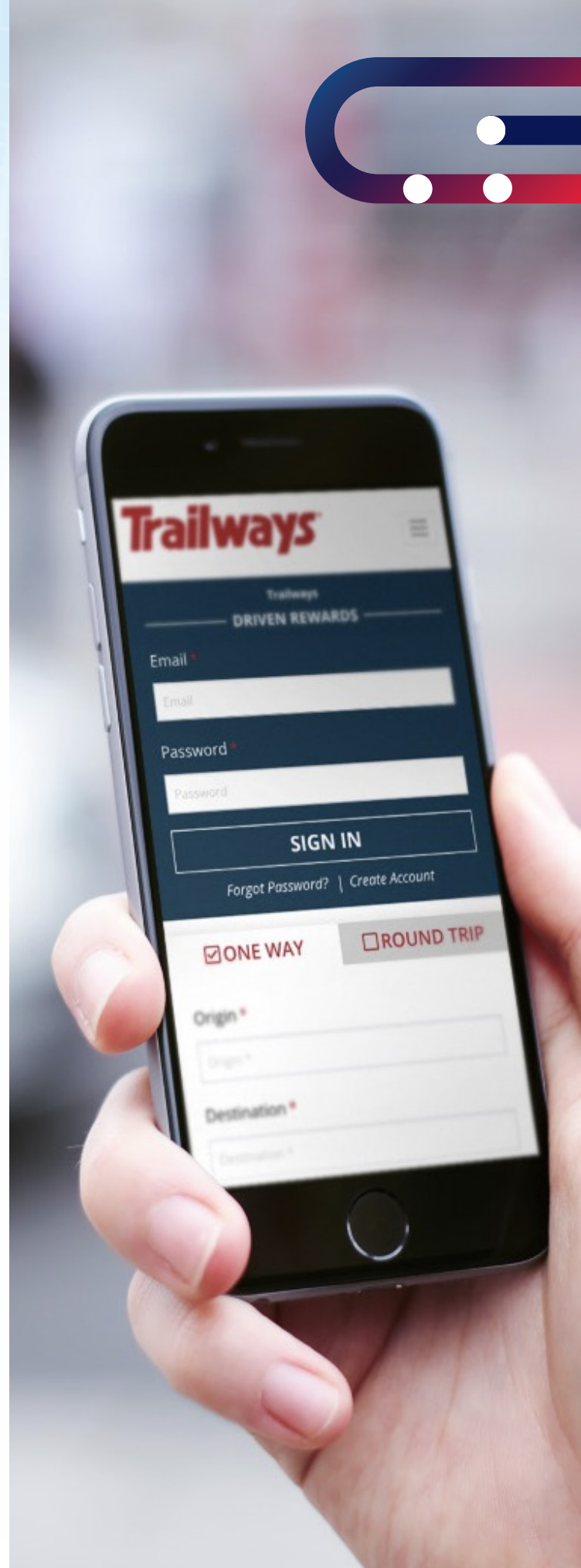
Motorcoach Fleet Size	Charter	Packaged Tours	Fixed Route/ Scheduled: Urban (5307)	Fixed Route/ Scheduled: Rural (5311 (f))	Fixed Route/ Scheduled: All Other
1-9 buses	97.3%	39.3%	4.5%	6.3%	9.8%
10-24 buses	98.6%	29.7%	9.5%	6.8%	9.5%
25-49 buses	97.3%	37.8%	16.2%	16.2%	18.9%
50-99 buses	100.0%	17.2%	27.6%	44.8%	48.3%
100+ buses	100.0%	43.8%	50.0%	43.8%	25.0%
Industry Total	90.4%	31.6%	11.7%	13.1%	14.8%

In 2023, 75.4% of carriers provided more than one service. Approximately one in four (24.6%) carriers had mileage in 2023 for just one service, 26.7% offered two services, 24.9% provided three services, and 23.8% offered four or more services.

PERCENTAGE OF CARRIERS BY NUMBER OF SERVICES PROVIDED IN 2023



	Sightseeing	Commuter	Special Services/ Shuttle
	31.3%	5.4%	34.8%
	25.7%	12.2%	44.6%
	24.3%	13.5%	43.2%
	27.6%	17.2%	55.2%
	37.5%	50.0%	68.8%
	26.5%	11.3%	39.5%





Motorcoach Fleet Size	Charter	Packaged Tours	Fixed Route/ Scheduled: Urban (5307)	
1-9 buses	27.2%	7.4%	16.5%	
10-24 buses	31.7%	10.2%	21.0%	
25-49 buses	37.4%	3.0%	20.6%	
50-99 buses	28.7%	2.2%	4.3%	
100+ buses	51.9%	0.0%	39.8%	
Industry Total	30.4%	7.5%	16.0%	

SIZE AND ACTIVITY

Vehicle Mileage

Industry motorcoaches traveled 1.6 billion miles in 2023, averaging 821,013 miles per carrier and 33,976 miles per motorcoach. The largest carriers with over 100 motorcoaches averaged 25,920 miles per motorcoach, while minor carriers with fewer than ten motorcoaches averaged 15,326 miles per motorcoach.



MOTORCOACH VEHICLE MILEAGE IN 2023 BY FLEET SIZE

Motorcoach Fleet Size	Vehicle Miles		Average Vehicle Miles per:	
	Number	Percent	Motorcoach	Carrier
1-9 buses	114,712,448	7.0%	15,326	75,838
10-24 buses	328,159,924	20.1%	65,660	1,238,083
25-49 buses	229,688,250	14.1%	60,195	2,571,287
50-99 buses	219,099,784	13.5%	68,436	5,896,962
100+ buses	737,334,273	45.3%	25,920	9,216,678
Industry Total	1,628,994,679	100.0%	33,976	821,013

Revenues

In 2023, respondent carriers to the Motorcoach Census reported that, on average, 30.4% of their revenues were from charter services. This was followed by 16.0% from urban scheduled services and 14.8% from rural scheduled services.

PERCENTAGE OF REVENUES BY TYPE OF SERVICE PROVIDED IN 2023

Fixed Route/ Scheduled: Rural (5311 (f))	Fixed Route/ Scheduled: All Other	Sightseeing	Commuter	Special Services/ Shuttle
17.8%	17.7%	2.6%	4.5%	6.2%
9.4%	2.0%	8.0%	11.2%	6.7%
12.3%	3.7%	1.4%	13.7%	8.0%
21.4%	20.3%	8.3%	7.6%	7.2%
1.9%	2.9%	0.0%	2.4%	1.0%
14.8%	14.0%	3.8%	6.9%	6.6%

SIZE AND ACTIVITY

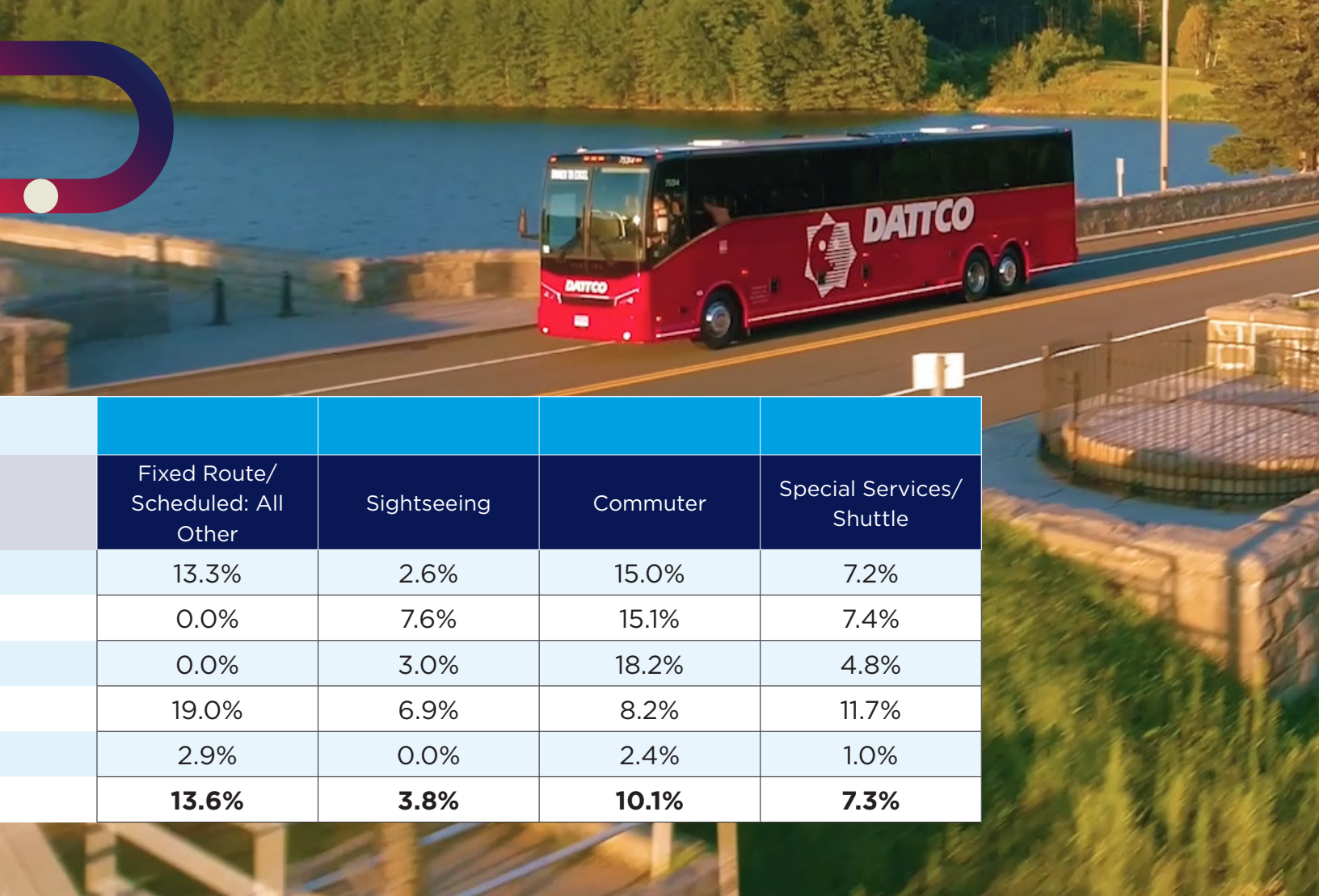
Passengers

In 2023, respondent carriers to the Motorcoach Census reported that, on average, 29.3% of their passengers were for charter services. This was followed by 14.6% for urban scheduled services and an equal percentage (14.6%) for rural scheduled services.

PERCENTAGE OF PASSENGERS BY TYPE OF SERVICE PROVIDED IN 2023

Motorcoach Fleet Size	Charter	Packaged Tours	Fixed Route/ Scheduled: Urban (5307)	Fixed Route/ Scheduled: Rural (5311 (f))
1-9 buses	24.2%	7.3%	14.1%	16.4%
10-24 buses	32.3%	5.3%	19.5%	12.9%
25-49 buses	37.6%	2.7%	21.0%	12.8%
50-99 buses	27.4%	2.1%	4.8%	19.8%
100+ buses	51.9%	0.0%	39.8%	1.9%
Industry Total	29.3%	6.7%	14.6%	14.6%

Motorcoach Fleet Size	Charter	Packaged Tours	Fixed Route/ Scheduled: Urban (5307)
1-9 buses	33.8%	8.2%	0.0%
10-24 buses	26.9%	6.3%	14.6%
25-49 buses	31.0%	1.9%	19.5%
50-99 buses	28.4%	2.2%	4.9%
100+ buses	49.0%	0.0%	41.7%
Industry Total	29.2%	6.0%	15.2%



	Fixed Route/ Scheduled: All Other	Sightseeing	Commuter	Special Services/ Shuttle
	13.3%	2.6%	15.0%	7.2%
	0.0%	7.6%	15.1%	7.4%
	0.0%	3.0%	18.2%	4.8%
	19.0%	6.9%	8.2%	11.7%
	2.9%	0.0%	2.4%	1.0%
	13.6%	3.8%	10.1%	7.3%

Mileage

In 2023, respondent carriers to the Motorcoach Census reported that, on average, 29.2% of their mileage was from providing charter services. This was followed by 17.6% from rural scheduled services and 15.2% from urban scheduled services.

PERCENTAGE OF PASSENGERS BY TYPE OF SERVICE PROVIDED IN 2023					
	Fixed Route/ Scheduled: Rural (5311 (f))	Fixed Route/ Scheduled: All Other	Sightseeing	Commuter	Special Services/ Shuttle
	25.7%	18.4%	3.1%	6.0%	4.8%
	16.1%	0.7%	11.7%	14.4%	9.3%
	15.1%	0.0%	2.2%	23.9%	6.5%
	25.2%	22.6%	0.5%	6.8%	9.5%
	1.9%	1.9%	0.0%	3.4%	1.9%
	17.6%	12.9%	3.3%	9.0%	7.0%

APPENDIX:

STUDY METHODOLOGY

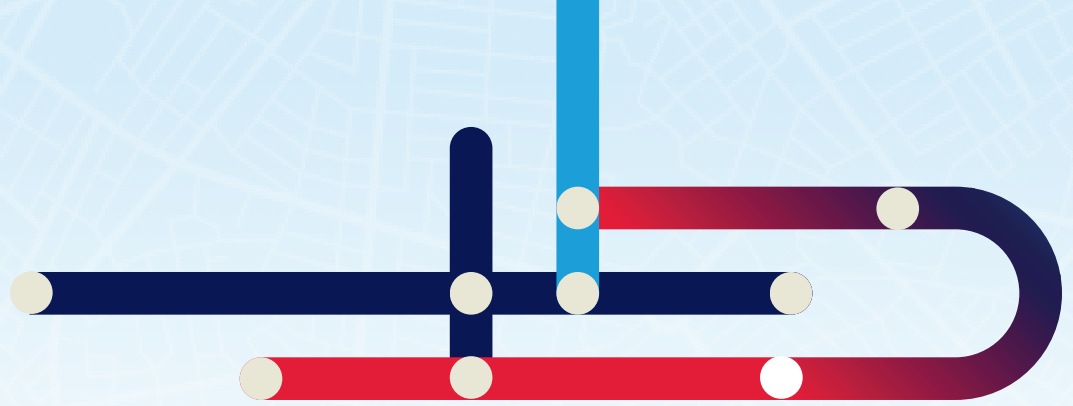
The American Bus Association Foundation commissioned the Motorcoach Census to measure the size and activity of the motorcoach transportation service industry in the United States and Canada. The study estimates and reports the total industry size and activity for 2023. This appendix describes the data sources and methodologies used in the study. The appendix describes the target population, the survey frame, the survey data collection and processing, the industry size estimation, and the industry activity estimation.

Target Population

The study's target population is the motorcoach transportation service industry in the United States and Canada in 2023. The sector consists of private-sector organizations that lease/own and operate motorcoaches and offer motorcoach transportation services to the public, including 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 solely for their 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 services used in this study are defined here:

- **Charter**
A preformed group (organization, association, tour company, shuttle service, church, school, etc.) that 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. The price usually includes lodging, meals, sightseeing, and transportation.
- **Sightseeing**
A service motorcoach or tour company offers to carry passengers to 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.
- **Airport Shuttle**
A private motorcoach service usually operating on a fixed route to transport passengers to and from airports.
- **Special Operations**
Published, regular-route service to special events, such as fairs and sporting events, or service for employees to work sites.



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 30 feet in length. This definition closely matches the definition of an OTRB written into U.S. law: “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.

Survey Frame

Tourism Economics 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:

- American Bus Association Foundation
- Dun and Bradstreet
- U.S. Department of Transportation
- Motor Coach Canada

Survey Data Collection and Processing

Online survey questionnaires with cover letters from the ABA were sent electronically to potential carriers and Tourism Economics sent weekly reminders to carriers during the four-week survey period. The ABA sent notices several times to its members by e-mail encouraging them to participate in the survey.

Submitted electronic questionnaires were reviewed for completeness and validity. The data were tabulated and evaluated for duplicates, inconsistencies, irregularities, and respondent-specific values significantly different from average

reported values. The final survey database contained usable responses from 291 motorcoach carriers.

Estimation Approach

Tourism Economics calculated sample totals for the types of activity measured (e.g., mileage, passengers, and employment) to estimate the total population for the motorcoach industry activity. Then, the total number of motorcoaches in each fleet size category was estimated 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 divided by the sample total in the category. After weighing the sample totals by fleet size, the population totals for each fleet size were summed to calculate an industry total.





RESEARCH

ABOUT THE TEAM



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