



# MOTORCOACH CENSUS 2025

MAY 2026



American  
Bus Association  
*100 Years*



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Foundation



TOURISM  
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# Buses Mo





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# RESEARCH OVERVIEW

The Bus 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 2025.

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 industry is defined as:

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

- Includes motorcoach transportation companies that are 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 own use, such as businesses that operate motorcoaches to shuttle their employees.





## DEFINITION OF A MOTORCOACH

For this study, a bus, 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, namely “a bus characterized by an elevated passenger deck located over a baggage compartment” (49-CFR-47.3). 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 288 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 2025. 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 2025 MOTORCOACH CENSUS

In 2025, the motorcoach industry in the United States and Canada comprised 1,891 companies that operated 50,968 motorcoaches. In the United States, 1,769 companies operated 49,543 motorcoaches; in Canada, 122 companies operated 1,425 motorcoaches.

### SERVICES

Motorcoach companies offer a wide range of services. In 2025, 86.9% of motorcoach companies provided charter service, 31.0% provided tour service, 27.6% provided sightseeing, 14.8% provided urban scheduled service, 12.5% provided commuter services, and 11.8% provided rural scheduled service.

### COMPANIES

Most companies (87.3%) were small and operated fewer than 25 motorcoaches. These firms operated 17,373 motorcoaches and accounted for 35.5% of motorcoach passenger mileage. Mid-sized companies that operated 25 to 99 motorcoaches ran 7,694 motorcoaches, accounting for 26.8% of the industry's motorcoach passenger mileage. Large companies that operated over 100 motorcoaches accounted for 50.8% of the industry's fleet and 37.7% of the industry's motorcoach passenger mileage.

### EMPLOYMENT

The motorcoach industry provided jobs to 77,176 people in 2025. On average, a motorcoach company provided 41 jobs or 1.5 jobs per motorcoach. Small companies that operated fewer than 25 motorcoaches accounted for 33.0% of motorcoach industry jobs. Mid-sized companies – those that operated between 25 and 99 motorcoaches – accounted for 19.1% of motorcoach industry jobs. Large companies that operated more than 100 motorcoaches provided for 47.8% of motorcoach industry jobs.

### MOTORCOACH USE

On average, a motorcoach provided 0.9 million passenger miles, employed 1.5 people and traveled 40,297 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.

The industry is consolidating, but getting stronger. Fewer operators are running larger fleets, activity is growing quickly, and motorcoaches are being used more intensively – all while operators are improving efficiency and scaling with relatively lean staffing.



SELECTED RESULTS OF THE BUS CENSUS				
Size of the Motorcoach Industry in the United States and Canada	2023	2024	2025	2024-2025% Change
US Carriers	1,859	1,829	1,769	-3.3%
US Motorcoaches	46,751	47,348	49,543	4.6%
Canada Carriers	125	130	122	-6.2%
Canada Motorcoaches	1,195	1,319	1,425	8.0%
Total Carriers	1,984	1,959	1,891	-3.5%
Total Motorcoaches	47,946	48,667	50,968	4.7%
Motorcoach Industry Activity in the United States and Canada				
Passenger Miles	38.0 billion	40.3 billion	43.9 billion	8.9%
Miles Traveled	1.6 billion	1.7 billion	2.1 billion	18.2%
Employment	76,949	74,399	77,176	3.7%
Motorcoach Operating Ratios				
Passenger miles per motorcoach	0.8 million	0.8 million	0.9 million	4.0%
Miles traveled per motorcoach	33,976	35,692	40,297	12.9%
Employment per motorcoach	1.6	1.5	1.5	-0.9%

# SIZE AND ACTIVITY OF THE INDUSTRY

## IN 2025

The Bus Census reports estimates of the size and activity of the motorcoach transportation services industry in the United States and Canada in the calendar year 2025. 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 2025, the motorcoach industry in the United States and Canada comprised 1,891 carriers and 50,968 motorcoaches. In the United States, 1,769 carriers operated 49,543 motorcoaches; in Canada, 122 carriers operated 1,425 motorcoaches. The average carrier operated 27 motorcoaches.



### TOTAL CARRIERS AND MOTORCOACHES IN 2025 BY FLEET SIZE

Motorcoach Fleet Size	Carriers		Motorcoaches		Average Number of Motorcoaches
	Number	Percent	Motorcoach	Carrier	
1-9 buses	1,320	69.8%	10,717	21.0%	8
10-24 buses	331	17.5%	6,655	13.1%	20
25-49 buses	98	5.2%	3,594	7.1%	37
50-99 buses	52	2.7%	4,101	8.0%	79
100+ buses	90	4.8%	25,901	50.8%	288
<b>Industry Total</b>	<b>1,891</b>	<b>100.0%</b>	<b>50,968</b>	<b>100.0%</b>	<b>27</b>

## PASSENGER MILES

A passenger mile is defined as one person transported one mile. In 2025, the motorcoach industry in the United States and Canada provided 43.9 billion passenger miles, an 8.9% increase from 2024, reflecting continued recovery in travel demand and expanded service activity across the industry. On average, each carrier generated 23.2 million passenger miles, and each motorcoach generated 0.9 million passenger miles.

The largest carriers (100 or more motorcoaches) accounted for 37.7% of industry passenger miles.

On average, a large carrier accounted for 184 million passenger miles or 0.6 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 6.1 million passenger miles per carrier for 8.0 billion or 18.3% of industry passenger miles.

### MOTORCOACH PASSENGER MILES IN 2025 BY FLEET SIZE

Motorcoach Fleet Size	Passenger Miles		Average Passenger Miles per:	
	Number	Percent	Motorcoach	Carrier
1-9 buses	8,049,420,000	18.3%	751,058	6,098,045
10-24 buses	7,535,228,000	17.2%	1,132,231	22,765,039
25-49 buses	6,013,401,000	13.7%	1,673,389	61,361,235
50-99 buses	5,737,978,000	13.1%	1,399,263	110,345,731
100+ buses	16,567,795,000	37.7%	639,656	184,086,611
<b>Industry Total</b>	<b>43,903,822,000</b>	<b>100.0%</b>	<b>861,400</b>	<b>23,217,251</b>

## PASSENGER BOARDINGS

Passenger boardings in 2025 highlight the central role of motorcoach operators in the movement of travelers across the United States and Canada. Fleets operating 25–49 motorcoaches accounted for the largest share of total boardings (30.6%), closely followed by carriers in the 50–99-bus category (29.1%). These operators combine substantial fleet capacity with high vehicle utilization, enabling them to serve a broad mix of services.

Carriers operating 100 or more motorcoaches generated 22.5% of all boardings, reflecting the scale and network reach of a relatively small number of very large firms. Operators with 10–24 buses contributed 15.8% of total boardings, while the smallest carriers—those with 1–9 buses—accounted for 2.1%, consistent with their focus on limited, often seasonal operations. Overall, the industry recorded 346.3 million passenger boardings in 2025, illustrating both the diversity of operator sizes and the heavy concentration of passenger activity among fleets.

### MOTORCOACH PASSENGER BOARDINGS IN 2025 BY FLEET SIZE

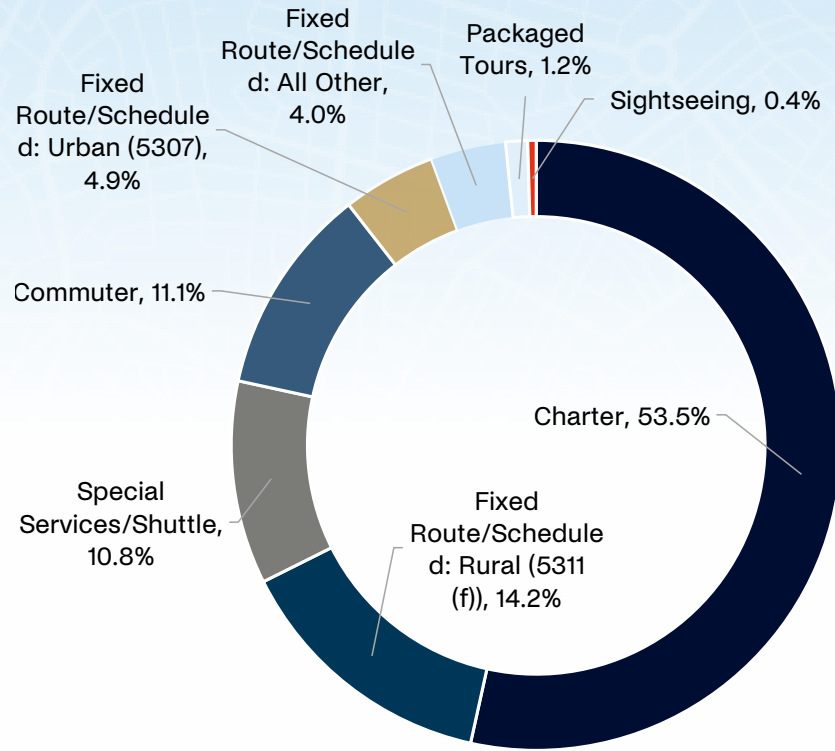
Motorcoach Fleet Size	Passenger Boardings	
	Number	Percent
1-9 buses	7,187,568	2.1%
10-24 buses	54,879,882	15.8%
25-49 buses	105,819,978	30.6%
50-99 buses	100,660,639	29.1%
100+ buses	77,755,807	22.5%
<b>Industry Total</b>	<b>346,303,874</b>	<b>100.0%</b>

# SIZE AND ACTIVITY

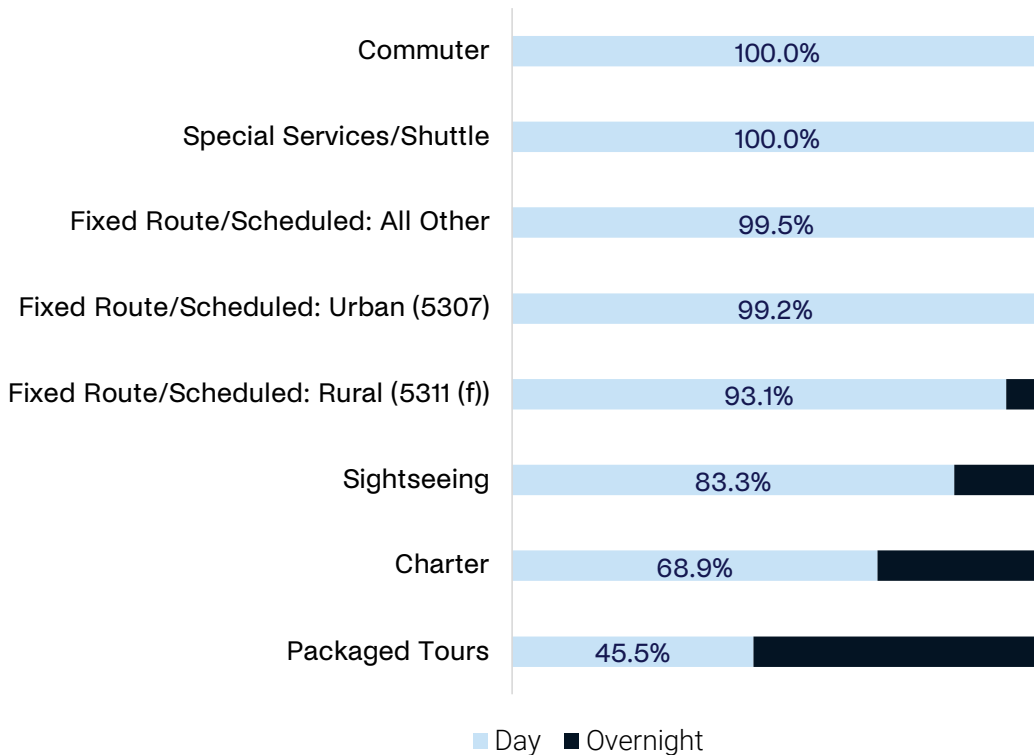
## TRIP TYPES

Charter trips constituted 53.5% of all trips in 2025, with the majority (68.9%) being day trips. Slightly more than one in 10 trips (14.2%) was a rural scheduled trip, and almost all (93.1%) of these trips were day trips.

The highest percentage of overnight trips was for packaged tours, with 54.5% being overnight. Packaged tours constituted 1.2% of all trips.



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



## EMPLOYMENT

In the United States and Canada, the motorcoach industry employed 77,176 individuals in 2025 (a 3.7% increase from 2024), averaging 41 employees per carrier and 1.5 employees per motorcoach. The largest carriers with over 100 motorcoaches averaged 410 employees per carrier and 1.4 employees per motorcoach. Minor carriers with fewer than 10 motorcoaches averaged 12 employees per company and 1.5 employees per motorcoach.

### MOTORCOACH CARRIER EMPLOYMENT IN 2025 BY FLEET SIZE

Motorcoach Fleet Size	Employment				Average Employment Mileage per:	
	Total	Full-time	Part-time	Percent	Motorcoach	Carrier
1-9 buses	15,816	7,110	8,707	20.5%	1.5	12
10-24 buses	9,675	4,015	5,660	12.5%	1.5	29
25-49 buses	9,251	4,457	4,794	12.0%	2.6	94
50-99 buses	5,508	3,190	2,318	7.1%	1.3	106
100+ buses	36,925	21,119	15,806	47.8%	1.4	410
<b>Industry Total</b>	<b>77,176</b>	<b>39,890</b>	<b>37,286</b>	<b>100.0%</b>	<b>1.5</b>	<b>41</b>

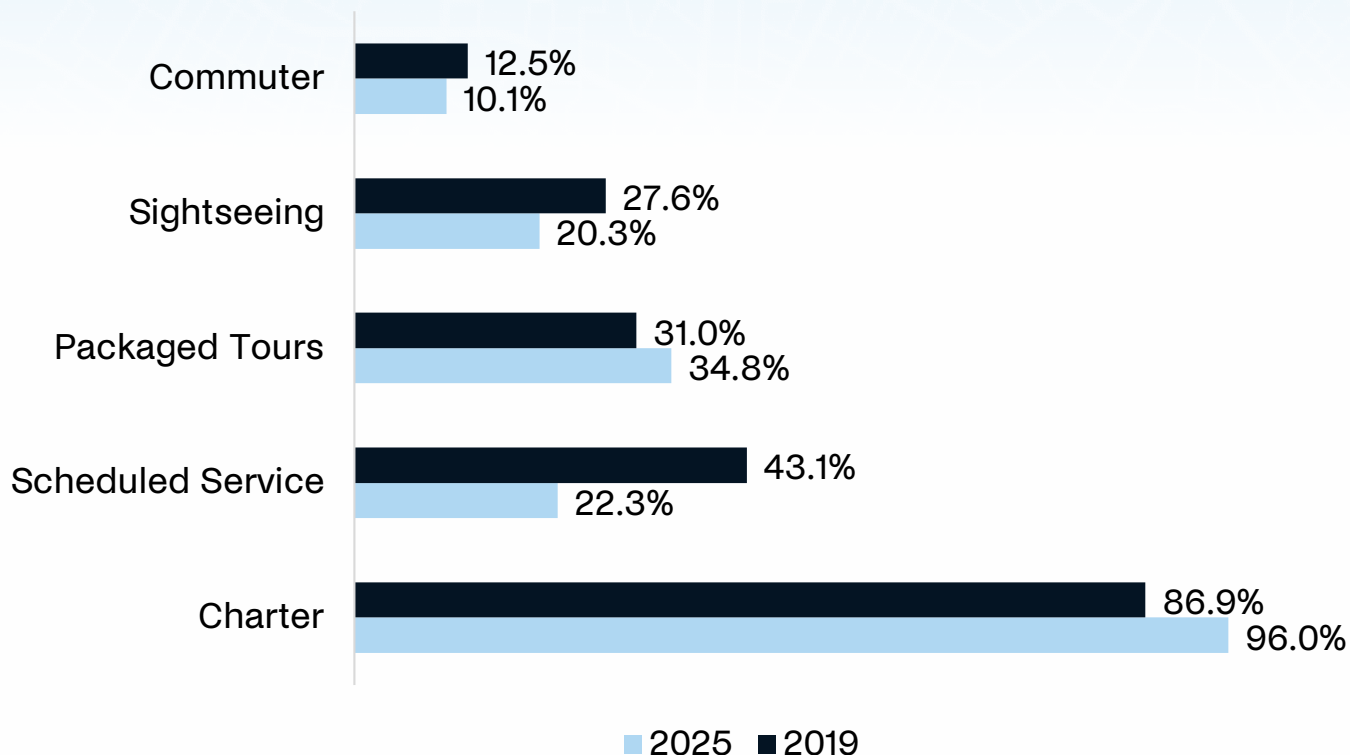


# SIZE AND ACTIVITY

## SERVICES PROVIDED

The motorcoach industry offers diverse services. Many carriers offer multiple types of service. According to the survey, almost nine in 10 carriers (86.9%) offered charter services, more than four in 10 offered special services (43.1%), almost a third offered packaged tours (31.0%), and slightly more than a quarter offered sightseeing tours (27.6%).

### MOTORCOACH TRIP TYPES BY SERVICE AND FLEET SIZE



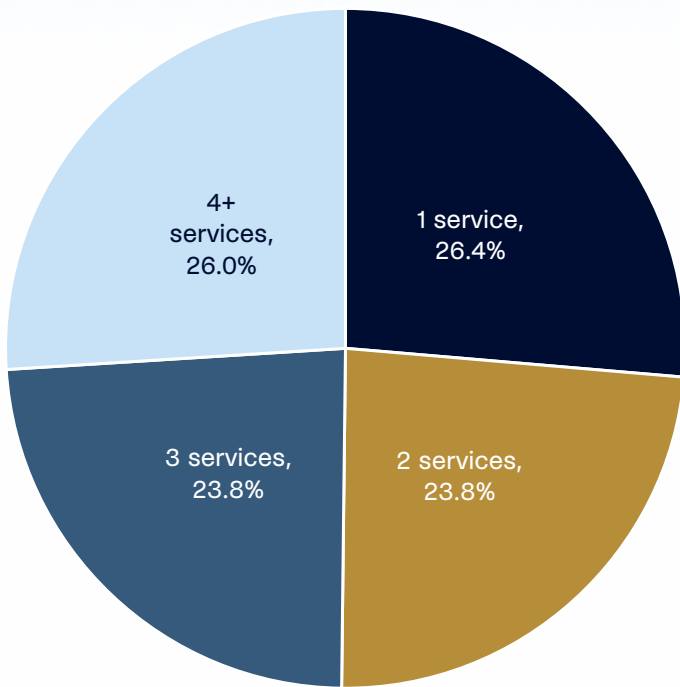
Comparing results to 2019, the data suggests that charter services—while being offered by most carriers—are becoming a less important part of the industry than in the past, as are packaged tours. Meanwhile, there seems to be an increase in demand for sightseeing and scheduled service.

### MOTORCOACH TRIP TYPES BY SERVICE AND FLEET SIZE

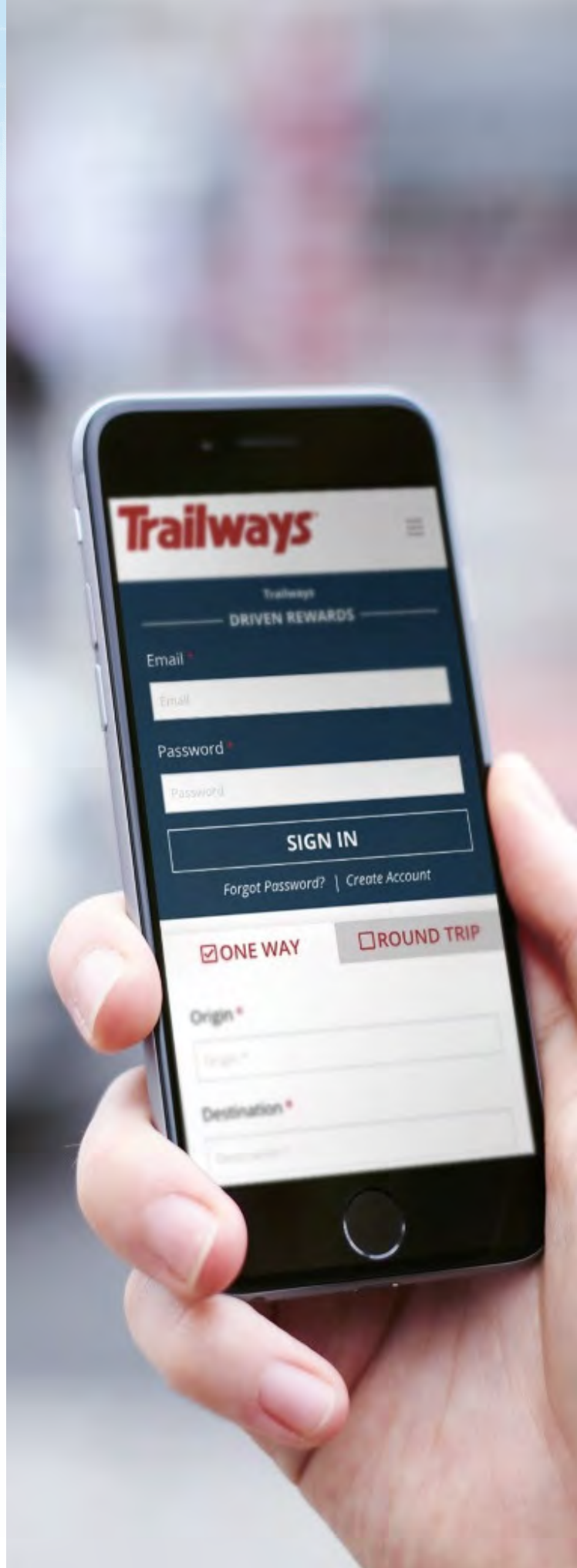
Motorcoach Fleet Size	Charter	Packaged Tours	Fixed Route/ Scheduled: Urban (5307)	Fixed Route/ Scheduled: Rural (5311 (f))	Fixed Route/ Scheduled: All Other
1-9 buses	96.6%	39.1%	12.6%	9.2%	11.5%
10-24 buses	100.0%	34.2%	5.5%	1.4%	5.5%
25-49 buses	86.7%	31.1%	24.4%	6.7%	15.6%
50-99 buses	93.9%	30.3%	27.3%	42.4%	42.4%
100+ buses	100.0%	29.0%	29.0%	29.0%	45.2%
<b>Industry Total</b>	<b>86.9%</b>	<b>31.0%</b>	<b>14.8%</b>	<b>11.8%</b>	<b>16.5%</b>

In 2025, 73.6% of carriers provided more than one service. Slightly more than a quarter of carriers (26.4%) had mileage in 2025 for just one service, 23.8% offered two services, 23.8% provided three services, and 26.0% offered four or more services.

**PERCENTAGE OF CARRIERS BY NUMBER OF SERVICES PROVIDED IN 2025**



	Sightseeing	Commuter	Special Services/ Shuttle
	36.8%	4.6%	42.5%
	39.7%	5.5%	45.2%
	17.8%	26.7%	42.2%
	18.2%	18.2%	48.5%
	22.6%	35.5%	67.7%
	<b>27.6%</b>	<b>12.5%</b>	<b>42.4%</b>



# SIZE AND ACTIVITY

## VEHICLE MILEAGE

Industry motorcoaches traveled 2.1 billion miles in 2025 (an 18.2% increase from 2024), averaging 1.1 million miles per carrier and 40,297 miles per motorcoach. This growth outpaced passenger demand, suggesting increased service frequency and expansion in scheduled and shuttle operations.

MOTORCOACH VEHICLE MILEAGE IN 2025 BY FLEET SIZE				
Motorcoach Fleet Size	Vehicle Miles		Average Vehicle Miles per:	
	Number	Percent	Motorcoach	Carrier
1-9 buses	37,824,209	1.8%	3,529	28,655
10-24 buses	143,133,629	7.0%	21,507	432,428
25-49 buses	192,492,336	9.4%	53,566	1,964,208
50-99 buses	436,088,308	21.2%	106,344	8,386,314
100+ buses	1,244,302,973	60.6%	48,041	13,825,589
<b>Industry Total</b>	<b>2,053,841,455</b>	<b>100.0%</b>	<b>40,297</b>	<b>1,086,114</b>

The largest carriers with over 100 motorcoaches averaged 48,041 miles per motorcoach, while minor carriers with fewer than ten motorcoaches averaged 3,529 miles per motorcoach.

## REVENUES

In 2025, respondent carriers to the Bus Census reported that, on average, 24.0% of their revenues were from charter services. This was followed by 20.7% from urban scheduled services and 15.2% from other scheduled services.

Motorcoach Fleet Size	Charter	Packaged Tours	Fixed Route/ Scheduled: Urban (5307)
1-9 buses	22.5%	14.8%	10.5%
10-24 buses	25.7%	8.4%	26.0%
25-49 buses	22.2%	6.1%	30.5%
50-99 buses	30.7%	8.3%	22.8%
100+ buses	29.5%	0.0%	31.6%
<b>Industry Total</b>	<b>24.0%</b>	<b>10.1%</b>	<b>20.7%</b>

## FUEL CONSUMPTION

Fuel consumption in the motorcoach industry is driven primarily by large fleets operating high-frequency scheduled and commuter services. Fleets with 100 or more motorcoaches account for more than 60 percent of total fuel use due to their extensive daily operations, while small charter-oriented fleets consume relatively little fuel despite their large number of operators.

FUEL CONSUMPTION BY FLEET SIZE IN 2025		
Motorcoach Fleet Size	Number	Percent
1-9 buses	5,819,109	1.6%
10-24 buses	23,086,069	6.3%
25-49 buses	32,082,056	8.8%
50-99 buses	76,506,721	21.0%
100+ buses	226,236,904	62.2%
<b>Industry Total</b>	<b>363,730,859</b>	<b>100.0%</b>



PERCENTAGE OF REVENUES BY TYPE OF SERVICE PROVIDED IN 2025				
Fixed Route/ Scheduled: Rural (5311 (f))	Fixed Route/ Scheduled: All Other	Sightseeing	Commuter	Special Services/ Shuttle
14.0%	20.4%	5.9%	0.0%	11.8%
19.6%	3.2%	4.5%	7.8%	4.7%
0.0%	23.7%	1.0%	9.4%	7.0%
9.5%	17.1%	2.6%	2.9%	6.2%
0.0%	36.4%	0.0%	0.0%	2.4%
<b>11.5%</b>	<b>15.2%</b>	<b>4.5%</b>	<b>7.0%</b>	<b>7.0%</b>

# SIZE AND ACTIVITY

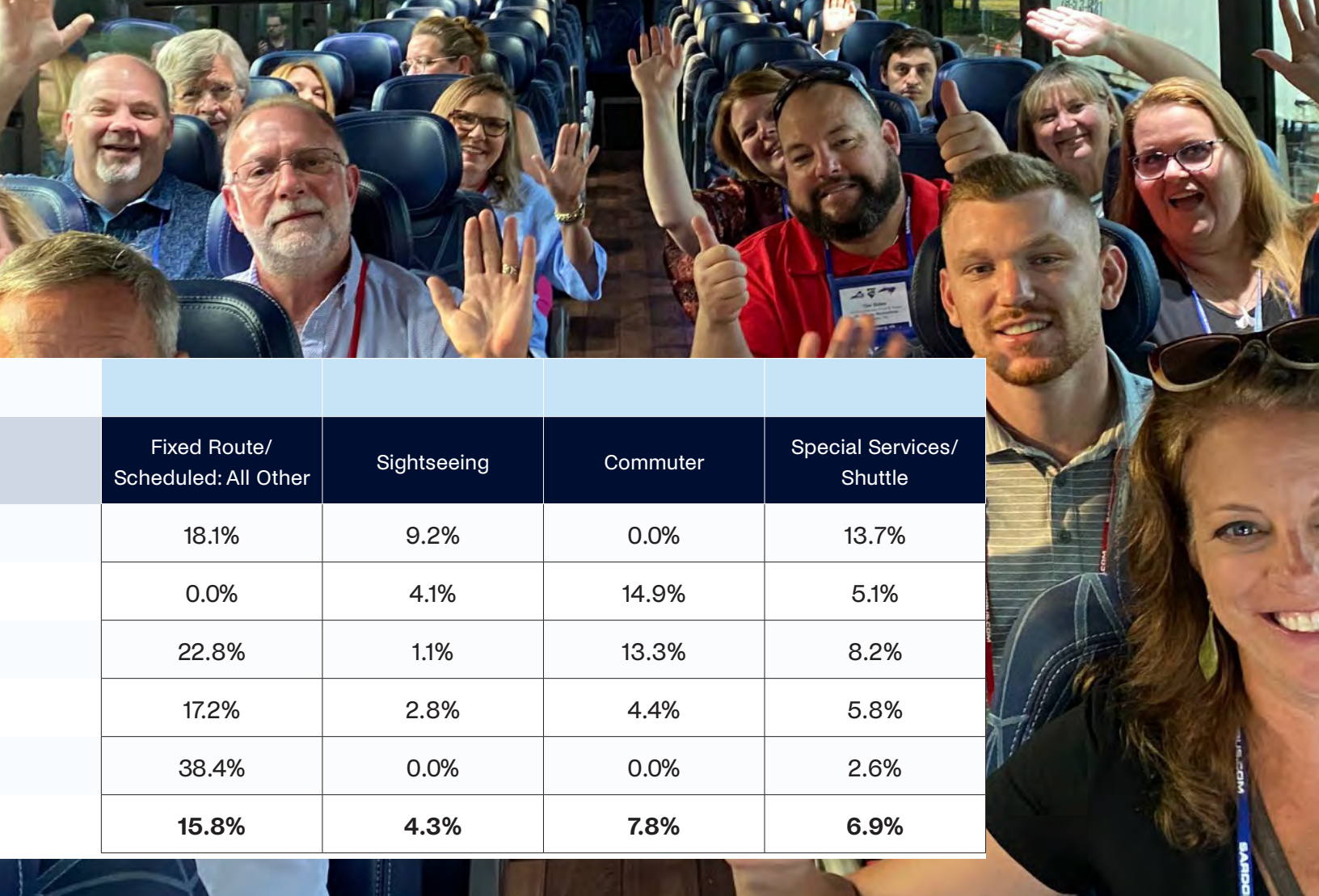
## PASSENGERS

In 2025, respondent carriers to the Bus Census reported that, on average, 24.8% of their passengers were for charter services. This was followed by 19.7% for urban scheduled services and 15.8% for other scheduled services.

PERCENTAGE OF PASSENGERS BY TYPE OF SERVICE PROVIDED IN 2025				
Motorcoach Fleet Size	Charter	Packaged Tours	Fixed Route/ Scheduled: Urban (5307)	Fixed Route/ Scheduled: Rural (5311 (f))
1-9 buses	30.5%	21.7%	6.8%	0.0%
10-24 buses	39.7%	8.9%	0.0%	27.3%
25-49 buses	17.8%	5.6%	31.2%	0.0%
50-99 buses	30.0%	10.4%	21.4%	8.1%
100+ buses	25.7%	0.0%	33.3%	0.0%
<b>Industry Total</b>	<b>24.8%</b>	<b>9.7%</b>	<b>19.7%</b>	<b>11.1%</b>



Motorcoach Fleet Size	Charter	Packaged Tours	Fixed Route/ Scheduled: Urban (5307)
1-9 buses	22.3%	12.6%	14.1%
10-24 buses	46.4%	7.2%	0.0%
25-49 buses	16.9%	5.1%	27.0%
50-99 buses	26.7%	10.6%	21.1%
100+ buses	25.7%	0.0%	33.3%
<b>Industry Total</b>	<b>22.7%</b>	<b>7.4%</b>	<b>22.2%</b>



	Fixed Route/ Scheduled: All Other	Sightseeing	Commuter	Special Services/ Shuttle
	18.1%	9.2%	0.0%	13.7%
	0.0%	4.1%	14.9%	5.1%
	22.8%	1.1%	13.3%	8.2%
	17.2%	2.8%	4.4%	5.8%
	38.4%	0.0%	0.0%	2.6%
	<b>15.8%</b>	<b>4.3%</b>	<b>7.8%</b>	<b>6.9%</b>

### MILEAGE

In 2025, respondent carriers to the Bus Census reported that, on average, 22.7% of their mileage was from providing charter services. This was followed by 22.2% from urban scheduled services and 17.8% from other scheduled services.

PERCENTAGE OF PASSENGERS BY TYPE OF SERVICE PROVIDED IN 2025				
Fixed Route/ Scheduled: Rural (5311 (f))	Fixed Route/ Scheduled: All Other	Sightseeing	Commuter	Special Services/ Shuttle
14.1%	23.6%	6.3%	0.0%	7.0%
27.1%	0.0%	2.3%	13.5%	3.6%
0.0%	23.5%	1.3%	20.2%	6.0%
11.2%	17.8%	1.5%	7.4%	3.8%
0.0%	38.4%	0.0%	0.0%	2.6%
<b>12.5%</b>	<b>17.8%</b>	<b>3.3%</b>	<b>9.7%</b>	<b>4.4%</b>

# APPENDIX:

## STUDY METHODOLOGY

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The American Bus Association Foundation commissioned the Bus 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 2025. 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 2025. 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 288 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.



685

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