

# Motorcoach Census 2011

A Benchmarking Study of the Size and Activity of the  
Motorcoach Industry in the United States and Canada in 2010



Prepared for the American Bus Association Foundation  
by John Dunham & Associates

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**February 27, 2014**

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# Note on Restatement

This Census was first released on June 18, 2012 and presented data on the industry in 2010. It was the first full census report conducted since 2008, when data for 2007 were collected. The 2011 Census (containing industry data for 2010) was designed to mirror the data collection and modeling efforts used in prior studies. Prior year data, methodologies, and model details were unavailable. JDA recreated the models, survey instruments and company contact lists in a manner consistent with prior research. In the initial report JDA estimated 4,478 motorcoach carriers in the United States and Canada in 2010 (see Table 1-1).

**Table 1-1**  
*Initial Snapshot of the Motorcoach Industry in 2010*

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<b>Fleet Size</b>	<b>Total Carriers</b>
1 to 9	3,711
10 to 24	459
25 to 49	210
50 to 99	67
Over 100	31
Total	4,478

This figure was consistent with prior research conducted by the National Transportation Safety Board. In the October 12, 2011 NTSB report, *Report on Curbside Motorcoach Safety*, researchers at the NTSB estimated that there were 4,172 carriers in the motorcoach industry in the United States; whereas JDA estimated the size of the US industry at 4,088 carriers (this along with 390 Canadian carriers equals the 4,478 number in Table 1). Based on this figure, and including carriers in Canada, the initial estimates appeared to be reasonable, and the resulting coach, passenger count and passenger mile figures calculated in the 2011 Census report appeared to track with those calculated by the prior consulting firm.

**Table 1-2**  
*Re-estimated Snapshot of the Motorcoach Industry in 2010*

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<b>Fleet Size</b>	<b>Total Carriers</b>
1 to 9	3,310
10 to 24	476
25 to 49	156
50 to 99	49
Over 100	20
Total	4,011

Since the 2011 report was issued, JDA has been able to conduct a much more extensive review of the industry, including contacting nearly 5,000 companies to determine if they fit the industry definition and to verify ownership structure. Critical to our revision was determining the number of active motorcoach carriers by adjusting for companies that were not operating in 2010, companies that were subsidiaries of other companies, and companies that merged with other companies prior to 2010. This means that the actual number of carriers operating in 2010 was likely 10 percent lower than the figure reported in the originally published 2011 Census (See Table 1-2).

Because of this finding, the American Bus Association Foundation and JDA decided that the initial 2011 Census report should be revised to reflect a more accurate picture of the motorcoach travel industry. This revision also enables us to establish a consistent methodology moving forward and ensure that we are able to trend the industry in future versions of the Motorcoach Census.

Since neither the ABAF nor JDA have access to the prior consulting firm's models, earlier Census reports cannot be adjusted. Therefore, the 2011 Census figures should not be compared with those from earlier years.

Please refer to the Methodology section of this report to review our complete data set and response rates for Motorcoach Census 2011.

# Executive Summary

*Motorcoach Census 2011* is a benchmarking 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 2010. The study provides information on the scope and impact of the motorcoach industry that builds upon earlier census research.

In 2010, the motorcoach industry in the United States and Canada consisted of 4,011 companies that operated 40,709 motorcoaches. In the United States, 3,672 companies operated 36,888 motorcoaches and, in Canada, 339 companies operated 3,821 motorcoaches.

**Passenger Trips** – The motorcoach industry provided about 601 million passenger trips in 2010. About 24% of these trips were provided by large companies that operated 100 or more motorcoaches, 31% by mid-size companies operating 25 to 99 motorcoaches and 45% by small companies operating fewer than 25 motorcoaches. The industry moved individual passengers a total of 69.3 billion miles in 2010.

**Services** – Motorcoach companies offer a diverse variety of services. About 95% of motorcoach companies provided charter service in 2010, 52% provided tour service, 30% provided sightseeing, 29% provided airport shuttle, 20% provided scheduled service, 19% provided special operations, and 13% provided commuter services. Charter service accounted for about 46% of motorcoach service mileage, followed by scheduled service (29%), commuter (10%), packaged tour service (8%), airport service (4%), sightseeing (2%), and special operations (1%).

**Companies** – The majority (94%) of motorcoach operators were small and operated fewer than 25 motorcoaches. All told, these firms operated 21,900 motorcoaches, provided 270.3 million passenger trips, and accounted for 41% of motorcoach mileage. Mid-sized companies, those that operated 25 to 99 motorcoaches, ran 9,400 motorcoaches, provided 184.5 million passenger trips, and accounted for 27% of the industry's motorcoach mileage. Large companies that operated over 100 motorcoaches accounted for over 23% of the industry's fleet, provided 24% of the industry's passenger trips, and 33% of the industry's motorcoach mileage.

**Employment** – The motorcoach industry provided jobs to 140,700 people in 2010; 72,300 full-time and 68,400 part-time. On average, a motorcoach company provided 35.1 jobs or 3.5 jobs per motorcoach. Over half (54%) of the jobs were with small companies that operated less than 25 motorcoaches, 18% were with mid-sized companies that operated 25 to 99 motorcoaches, and 28% were with large companies that operated 100 or more motorcoaches.

**Fuel Efficiency** – Considering the amount of passengers served per bus, motorcoaches move people with remarkable fuel efficiency. In 2010, 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 34.2 passengers achieved 207.0 passenger miles per gallon of fuel in 2010.

**Motorcoach Use** – On average, a motorcoach provided 14,800 passenger trips in 2010, moved individual passengers a total of 1.7 million miles, employed 3.5 people, used 8,700 gallons of fuel, and traveled 52,800 miles. About 56% of the average coach's service mileage was for charter, tour, and sightseeing services and 44% 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 2011*

**1. Size of the Motorcoach Industry in the United States and Canada in 2010**

*United States:*

Motorcoach carriers..... 3,672  
 Motorcoaches..... 36,888

*Canada:*

Motorcoach carriers..... 339  
 Motorcoaches..... 3,821

*Total:*

Motorcoach carriers..... 4,011  
 Motorcoaches..... 40,709

**2. Motorcoach Industry Activity in the United States and Canada in 2010**

Passenger trips.....601.3 million  
 Passenger miles......69.3 billion  
 Miles traveled..... 2.15 billion  
 Service miles (miles with passengers)..... 2.03 billion  
 Fuel consumed (gallons)......354.6 million  
 Employment.....140,700

**3. Motorcoach Operating Ratios for 2010**

Passenger trips per motorcoach..... 14,800  
 Passenger miles per motorcoach..... 1.7 million  
 Miles traveled per motorcoach..... 52,800  
 Service miles traveled per motorcoach..... 49,800  
 Passengers per service mile..... 34.2  
 Miles per gallon of fuel..... 6.1  
 Passenger miles per gallon of fuel.....207.0  
 Employment per motorcoach..... 3.5

**4. Demographics of Motorcoach Passenger Trips**

Students..... 25.6%  
 Senior..... 23.4%  
 All other..... 51.0%



# 1. Introduction

*Motorcoach Census 2011* is a benchmarking 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 2010. 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. Records of nearly 9,000 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 from December 2011 through February 2012. A total of 335 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, Prevost Car, and Daimler Commercial Buses North America. We acknowledge and thank them for their support. We are particularly grateful to the 335 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 2010. 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 2010

*Motorcoach Census 2011* reports estimates of the size and activity of the motorcoach transportation services industry in the United States and Canada in calendar year 2010. 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 2010, the motorcoach industry in the United States and Canada consisted of 4,011 carriers and 40,709 motorcoaches (Table 2-1). In the United States, 3,672 carriers operated 36,888 motorcoaches and, in Canada, 339 carriers operated 3,821 motorcoaches. The average carrier operated 10 motorcoaches.

**Table 2-1**

*Total Carriers and Motorcoaches in 2010 by Fleet Size*

Motorcoach Fleet Size	Carriers		Motorcoaches		Average Number of Motorcoaches
	Number	Percent	Number	Percent	
100 or more	20	0.5%	9,360	23.0%	468
50-99	49	1.2%	3,386	8.3%	69
25-49	156	3.9%	6,053	14.9%	39
10-24	476	11.9%	8,140	20.0%	17
Less than 10	3,310	82.5%	13,770	33.8%	4
Industry Total	4,011	100.0%	40,709	100.0%	10

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

### Passenger Trips

The motorcoach industry in the United States and Canada provided 601 million passenger trips in 2010 (Table 2-2). In 2010, the average carrier provided 150,000 passenger trips and an average motorcoach provided 14,800 passenger trips.

**Table 2-2**

*Motorcoach Passenger Trips in 2010 by Fleet Size*

Motorcoach Fleet Size	Passenger Trips		Average Passenger Trips per:	
	Total	Percent	Motorcoach	Carrier
100 or more	146,400,000	24.3%	15,600	7,319,000
50-99	61,900,000	10.3%	18,300	1,262,000
25-49	122,700,000	20.4%	20,300	787,000
10-24	135,000,000	22.4%	16,600	284,000
Less than 10	135,400,000	22.5%	9,800	41,000
Industry Total	601,300,000	100.0%	14,800	150,000

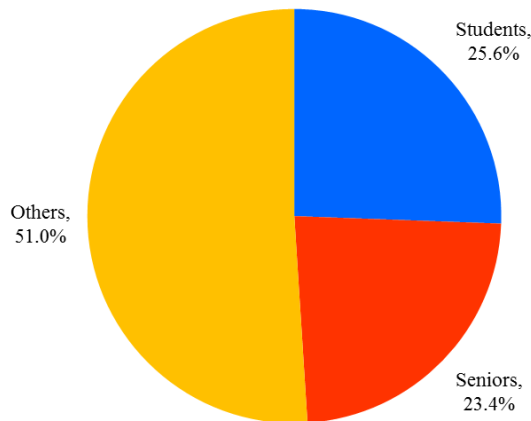
Note: Percentages may not sum to 100% because of rounding.

Almost 24% of passenger trips in 2010 were provided by the largest carriers, which accounted for 146 million passenger trips or, on average, over 7.3 million passenger trips per carrier. These carriers had an average of 15,600 passenger trips per motorcoach in 2010.

Small carriers with less than 25 motorcoaches provided 45% of industry passenger trips, which is, on average, 71,000 passenger trips per carrier and 12,000 passenger trips per motorcoach.

The motorcoach industry serves a wide and diverse customer base, but especially students and senior citizens (people 55 years or older). About 49% of the passenger trips provided by the motorcoach industry in 2010 were taken by students and seniors.<sup>1</sup>

**Figure 2-1**  
*Passenger Trips by Type of Passenger, 2010*



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 accounted for 69.3 billion passenger miles in 2010 (Table 2-3). On average, each carrier generated 17.3 million passenger miles and each motorcoach generated 1.7 million passenger miles.

**Table 2-3**  
*Motorcoach Passenger Miles in 2010 by Fleet Size*

Motorcoach Fleet Size	Passengers Miles		Average Passenger Miles per:	
	Number	Percent	Motorcoach	Carrier
100 or more	24,013,000,000	34.6%	2,600,000	1,200,700,000
50-99	6,745,000,000	9.7%	2,000,000	137,700,000
25-49	12,147,000,000	17.5%	2,000,000	77,900,000
10-24	11,514,000,000	16.6%	1,400,000	24,200,000
Less than 10	14,913,000,000	21.5%	1,100,000	4,500,000
Industry Total	76,069,000,000	100.0%	1,700,000	17,300,000

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

The largest carriers accounted for about 34.6% of industry passenger miles. On average, the largest carriers transported had 1.2 billion passenger miles per carrier and 2.6 million passenger miles per motorcoach; the largest of any fleet-size category.

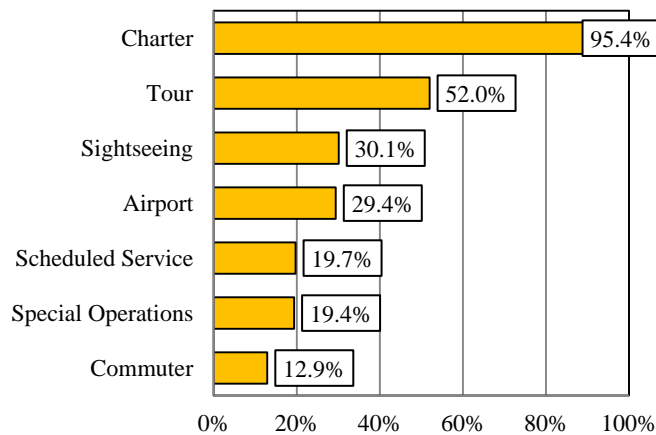
<sup>1</sup> Students are defined as those 18 years of age and younger. Young adults are defined as those of 19 to 30 years of age. Adults are defined as those of 31 to 54 years of age.

The smallest carriers, those with a fleet size of fewer than 10 motorcoaches, operated the smallest average number (1.1 million) of passenger miles per motorcoach. They had, on average, 4.5 million passenger miles per carrier for a total of 14.9 billion passenger miles, or 21.5% of industry passenger miles.

## Services Provided

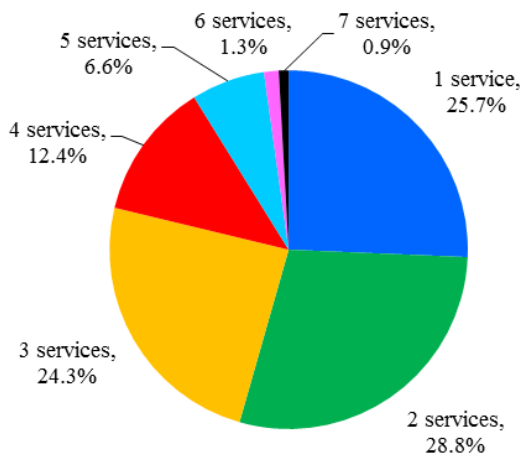
The services offered by the motorcoach industry are diverse. Nearly all carriers (95.4%) provided charter service in 2010, followed by tour (52.0%) sightseeing (30.1%), airport shuttle (29.4%) scheduled service (19.7%), special operations (19.4%), and commuter service (12.9%).

**Figure 2-2**  
*Percentage of Carriers Providing Types of Service in 2010*



Almost three in four (74.3%) carriers provided more than one service in 2010. More than one in four (25.7%) carriers had mileage in 2010 for just one service, 28.8% offered two services, 24.3% offered three services, 12.4% offered four services, 6.6% offered five services, 1.3% offered six services, and 0.9% offered all seven services.

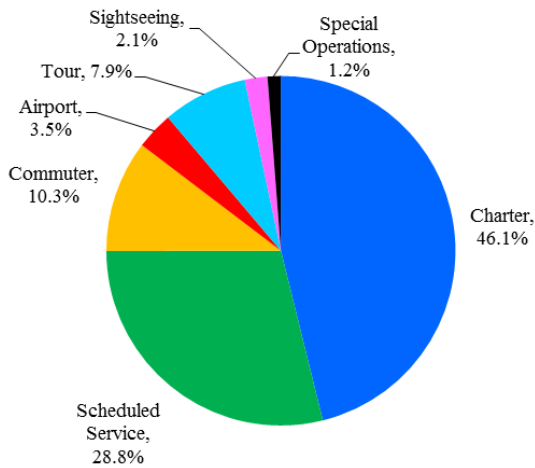
**Figure 2-3**  
*Percentage of Carriers by Number of Services Provided in 2010*



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

Three out of four (75.0%) service miles driven by motorcoaches in 2010 were dedicated to charter and scheduled services. In terms of service miles traveled, charter service ranked first and scheduled service second. Charter service accounted for 46.1% of the service miles traveled and scheduled route service accounted for 28.8%, followed by commuter (10.3%), tour (7.9%), airport service (3.5%), sightseeing (2.1%) and special operations (1.2%).

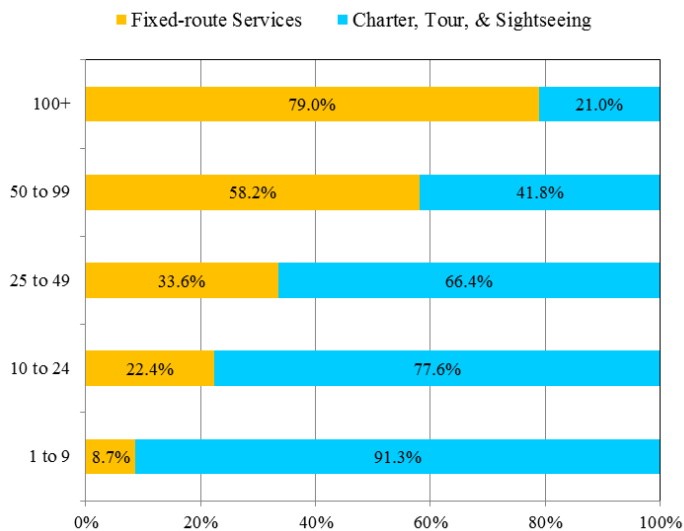
**Figure 2-4**  
*Percentage of Motorcoach Service Mileage in 2010 by Type of Service*



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

About 56.1% of motorcoach service mileage was accounted for by charter, tour, and sightseeing services, and 43.9% of mileage was produced 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 8.7% of mileage for the smallest carriers to 79.0% for the largest carriers.

**Figure 2-5**  
*Motorcoach Service Mileage in 2010 by Type of Service and Fleet Size*



## Vehicle Mileage

Industry motorcoaches traveled 2.15 billion miles in 2010, averaging 536,000 miles per carrier and 52,800 miles per motorcoach. The largest carriers with over 100 motorcoaches averaged 75,000 miles per motorcoach, while the smallest carriers; those with fewer than 10 motorcoaches, averaged 34,000 miles per motorcoach. Service mileage (miles traveled with passengers) accounted for 2.03 billion (94.5%) of the 2.15 billion total miles that motorcoach vehicles traveled in 2010.

**Table 2-4**  
*Motorcoach Vehicle Mileage in 2010 by Fleet Size*

Motorcoach Fleet Size	Vehicle Mileage		Average Vehicle Mileage per:	
	Number	Percent	Motorcoach	Carrier
100 or more	703,600,000	32.8%	75,200	35,179,000
50-99	219,100,000	10.2%	64,700	4,471,000
25-49	353,600,000	16.5%	54,600	2,267,000
10-24	401,800,000	18.7%	49,300	844,000
Less than 10	470,200,000	21.9%	34,200	142,000
Industry Total	2,148,300,000	100.0%	52,800	536,000

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

## Fuel Consumption

Almost 355 million gallons of fuel were consumed by industry motorcoaches in 2010. Each carrier, on average, consumed 88,000 gallons of fuel, or 8,700 gallons per motorcoach. Motorcoach fuel efficiency averaged 6.1 miles per gallon. With this fuel efficiency, a motorcoach carrying the industry average of 34.5 passengers achieved 207.0 passenger miles per gallon in 2010.

**Table 2-5**  
*Motorcoach Fuel Consumption in 2010 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	114,700,000	32.3%	12,300	5,734,000	6.1
50-99	37,200,000	10.5%	11,000	759,000	5.9
25-49	58,300,000	16.4%	9,600	374,000	6.1
10-24	65,500,000	18.5%	8,000	138,000	6.1
Less than 10	78,900,000	22.3%	5,700	24,000	6.0
Industry Total	354,600,000	100.0%	8,700	88,000	6.1

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

## Employment

The motorcoach industry in the United States and Canada employed 140,700 people in 2010, averaging 35.1 employees per carrier and 3.5 employees per motorcoach (Table 2-6). The largest carriers with over 100

motorcoaches averaged 1,972 employees per carrier and 4.2 employees per motorcoach, while the smallest carriers with fewer than 10 motorcoaches averaged 15 employees per company and 3.5 employees per motorcoach.<sup>2</sup>

**Table 2-6**  
*Motorcoach Carrier Employment in 2010 by Fleet Size*

Motorcoach Fleet Size	Employment		Average Employment per:	
	Total	Percent	Motorcoach	Carrier
100 or more	39,400	28.0%	4.2	1,972
50-99	9,400	6.7%	2.8	192
25-49	16,600	11.8%	2.7	106
10-24	26,900	19.1%	3.3	57
Less than 10	48,400	34.4%	3.5	15
Industry Total	140,700	100.0%	3.5	35

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

Of the 140,700 people employed by the motorcoach industry in 2010, 72,300 (51.4%) were full-time and 68,400 (48.6%) were part-time (Table 2-7). On a percentage basis, the largest carriers employed more people on a full-time basis than the smallest carriers; over six in ten (64.4%) of the largest carriers' employees were full-time, compared to fewer than four in ten (37.2%) for the smallest carriers.

**Table 2-7**  
*Full- and Part-time Employment in 2010 by Fleet Size*

Motorcoach Fleet Size	Full-time Employees	Part-Time Employees	Percent Full-time
100 or more	25,400	14,000	64.4%
50-99	5,900	3,500	62.5%
25-49	9,800	6,700	59.3%
10-24	13,200	13,700	49.0%
Less than 10	18,000	30,400	37.2%
Industry Total	72,300	68,400	51.4%

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

## Student Motorcoach Tourism

The motorcoach industry in the United States and Canada provided 95.8 million tourism passenger trips to student tour groups in calendar year 2010, and students accounted for 30.1% of all motorcoach tourism passenger trips provided in calendar year 2010.<sup>3</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 1.2 motorcoach tourism passenger trips in calendar year 2010.<sup>4</sup>

2 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, 2010. Available at: <http://www.buses.org/ABA-Foundation/Research/Economic-Impact>

3 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 (30.1 percent) are higher than student shares of passenger trips by type (25.6 percent) because the latter also includes fixed route services.

4 Ibid.



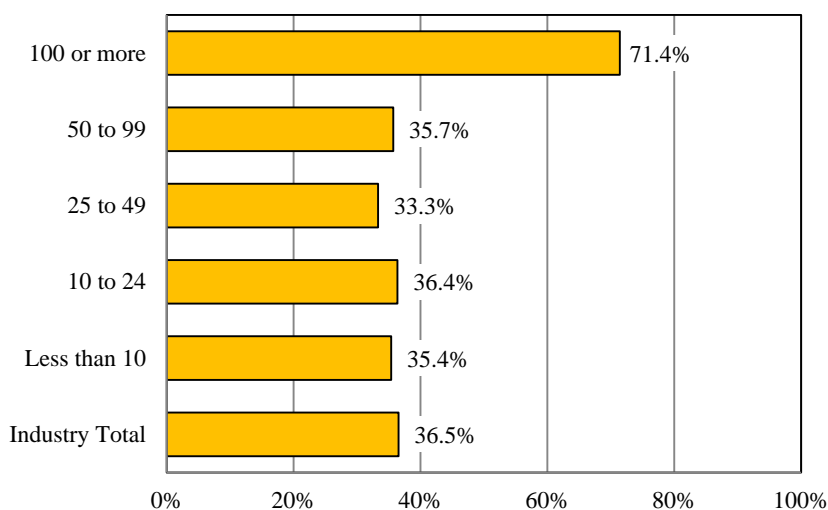
### 3. Motorcoach Carrier Characteristics

The *Motorcoach Census 2011* 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

Almost four in ten (36.5%) motorcoach carriers in the United States have experienced competition from transit agencies. More than seven in ten (71.4%) of the largest carriers have encountered competition from transit agencies. More than one in three (35.4%) of the smallest carriers have competed with transit agencies for business. More than four in ten motorcoaches (41.9%) are operated by carriers that have experienced competition from transit agencies.

**Figure 3-1**  
*Percentage of Carriers that Have Competed with Transit Agencies for Business*



#### Age of Motorcoaches

In 2010, the average motorcoach operated by carriers in the United States and Canada was 9 years old (manufactured in 2001), and the median motorcoach was 8 years old (manufactured in 2002). Among the fleet-size categories, the smallest carriers, those with less than 10 motorcoaches, had the oldest motorcoach fleet with an average age of ten years (manufactured in 2000). The average motorcoach for carriers with between 10 and 49 motorcoaches was 7 years old (manufactured in 2003), and the average motorcoach for carriers with over 50 motorcoaches was 6 years old (manufactured in 2004).

#### How Motorcoaches Were Acquired

In 2010, 4.9% of motorcoach carriers operated only leased motorcoaches in their fleet, while 72.0% only operated purchased motorcoaches, and 23.1% operated a mix of both (Table 3-1). Smaller carriers were more likely to have only purchased motorcoaches in their fleet.

**Table 3-1**  
*How Carriers Acquired Motorcoaches, Percentage of Carriers*

Motorcoach Fleet Size	Leased Only	Purchased Only	Both	Total
100 or more	0.0%	28.6%	71.4%	100.0%
50-99	0.0%	42.9%	57.1%	100.0%
25-49	2.9%	62.9%	34.3%	100.0%
10-24	2.8%	73.2%	23.9%	100.0%
Less than 10	6.6%	79.6%	13.9%	100.0%
Industry Total	4.9%	72.0%	23.1%	100.0%

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

Meanwhile, more than eight in ten (83.9%) of the motorcoaches in the industry were purchased (Table 3-2). Smaller companies, with less than 25 motorcoaches, reported having a smaller proportion of leased vehicles (12.3%) than large companies with greater than 49 motorcoaches (20.4%).

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

Motorcoach Fleet Size	Leased	Purchased	Total
100 or more	18.2%	81.8%	100.0%
50-99	26.5%	73.5%	100.0%
25-49	20.8%	79.2%	100.0%
10-24	9.8%	90.2%	100.0%
Less than 10	13.8%	86.2%	100.0%
Industry Total	16.1%	83.9%	100.0%

## How Fuel Was Purchased

Over half (53.8%) of carriers in the United States and Canada purchased fuel for their motorcoaches only at retail in 2010, while less than one in twenty (4.2%) bought only at wholesale, and 42.0% 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. Almost 79% of the smallest carriers, for example, purchased fuel only at retail versus only 14% for the 50-99 motorcoaches fleet-size category. About 88% of the carriers with over 100 motorcoaches that responded to the survey 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	Total
100 or more	0.0%	12.5%	87.5%	100.0%
50-99	14.3%	21.4%	64.3%	100.0%
25-49	17.1%	2.9%	80.0%	100.0%
10-24	34.8%	4.5%	60.6%	100.0%
Less than 10	78.8%	2.2%	19.0%	100.0%
Industry Total	53.8%	4.2%	42.0%	100.0%

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

Even though a majority of motorcoach carriers reported buying fuel only at retail, 57.4% of motorcoach fuel was actually purchased at wholesale in 2010 (Table 3-4). This was due to the fact 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 (16.9%) at wholesale, and the largest carriers with over 100 motorcoaches purchased 78.6% 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>	<b>Total</b>
100 or more	21.4%	78.6%	100.0%
50-99	30.6%	69.4%	100.0%
25-49	31.4%	68.6%	100.0%
10-24	47.9%	52.1%	100.0%
Less than 10	83.1%	16.9%	100.0%
Industry Total	42.6%	57.4%	100.0%

## Founding Year of Carrier

The motorcoach industry in the United State and Canada is made up of a healthy mix of old and new companies. About 3.1% of reporting carriers were founded before 1920 and 9.0% of carriers were founded before 1940. About one out of every three (34.3%) carriers was founded after 1995, and about one in every ten (10.2%) carriers was founded after 2005. The average founding year of reporting carriers is 1981, and the median founding year of reporting carriers is 1989. By decade, almost one quarter of the carriers were founded in the 1990s (24.4%), closely followed by 2000-2009 (23.8%) and the 1980s (17.9%).

**Table 3-5**

*Percentages of Motorcoach Carriers by Year Founded*

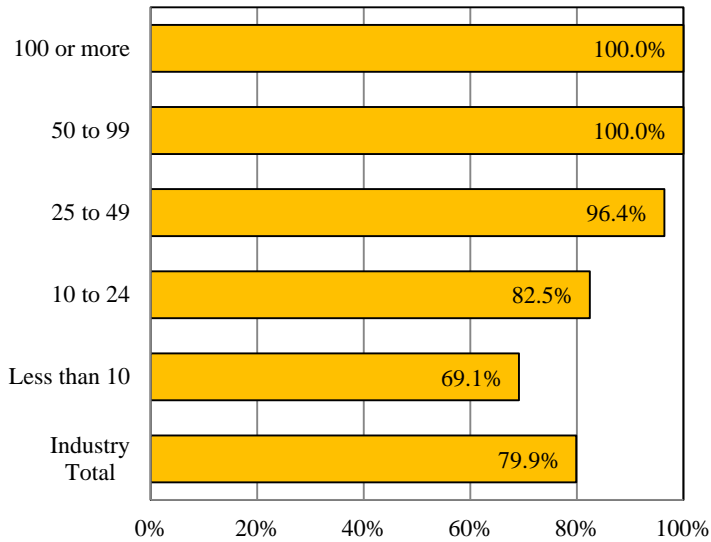
<b>Year Founded</b>	<b>Percent of Carriers</b>
Pre-1920	3.1%
1920-1939	5.9%
1940-1959	10.8%
1960-1979	13.6%
1980s	17.9%
1990s	24.4%
2000-Present	24.4%

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

## Other Revenue-Generating Passenger Vehicles

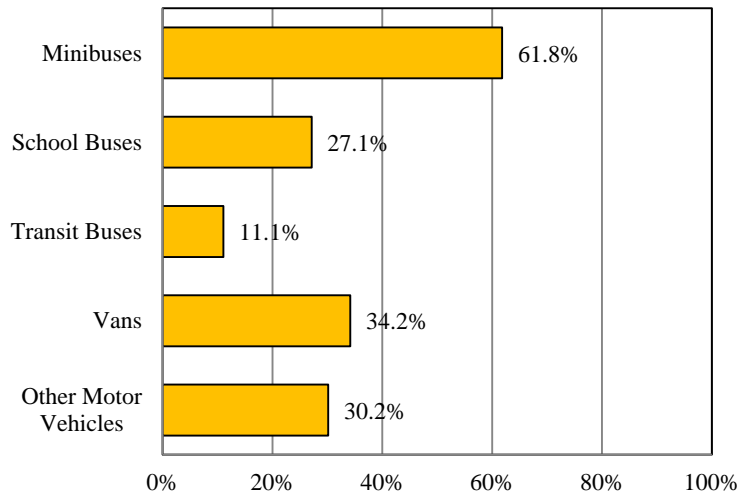
Four out of five (79.9%) of the carriers reported operating other revenue-generating passenger vehicles in addition to their motorcoaches. The largest fleet-size category, carriers operating 100 or more motorcoaches, all operated other passenger vehicles, while over half (69.1%) of the smallest fleet-size category, carriers operating fewer than 10 motorcoaches, reported operating other vehicles.

**Figure 3-2**  
*Percentage of Reporting Carriers Operating Other Vehicles by Fleet Size, 2010*



About six in ten reporting carriers (61.8%) operated mini-buses, while 27.1% operated school buses; 11.1% operated transit buses; 34.2% operated vans; and 30.2% of operators reported owning other types of revenue-generating passenger vehicles.

**Figure 3-3**  
*Percentage of Reporting Carriers Operating Other Vehicles by Type, 2010*



# Appendix A. Study Methodology

The American Bus Association Foundation commissioned *Motorcoach Census 2011* 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 2010. 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 2010. 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

John Dunham & Associates assembled a list (i.e., survey frame) of potential motorcoach carriers in the United States and Canada or, in other words, a list of businesses that potentially offer motorcoach transportation services to the public. The list was developed using information from prior motorcoach census research, the American Bus Association Foundation, Dun & Bradstreet Inc., the U.S. Department of Transportation, and the 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.

## Survey Data Collection and Processing

Survey questionnaires with cover letters from John Dunham & Associates (JDA) and business-reply envelopes were mailed with first-class postage to the 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 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 and survey respondents were contacted to clarify anomalous answers. The final survey database contained usable responses from 335 motorcoach carriers. Table A-1 presents the sample sizes realized from the returns to the *Motorcoach Census 2011* survey of motorcoach carriers. The survey is statistically significant with a margin of error of +/- 5.1 percent.

**Table A-1**

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

	Motorcoach Fleet Size				
	Less than 10	10 to 24	25 to 49	Over 50	Total
<i>Number of carriers reporting information</i>					
Total reporting	185	86	38	26	335
Employment	146	81	37	24	288
Motorcoaches	146	81	37	24	288
Fuel	136	75	35	22	268
Mileage	140	74	34	22	270
Mileage by Service	142	74	33	22	271
Passengers by Service	149	75	36	23	283
Year Founded	148	79	36	24	287
Leased/Purchased Motorcoaches	137	71	35	21	264
Wholesale/Retail Gasoline	137	66	35	22	260
Other Vehicles	91	56	28	20	195
Passenger Demographics	133	68	33	18	252

## Estimating the Size of the Motorcoach Industry in 2010

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. JDA was able to verify the number of motorcoaches operated by 1,019 companies, including the number of motorcoaches operated by the 335 companies who responded to the survey. JDA also identified and targeted the largest companies to verify the exact number of companies (20) that operated over 100 motorcoaches in 2010. JDA kept the number of companies with over 100 motorcoaches constant at 20 and estimated the distribution of the remaining companies in accordance with the observed results.

**Table A-2**

*Re-estimated Snapshot of the Motorcoach Industry in 2010*

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<b>Fleet Size</b>	<b>Total Carriers</b>
1 to 9	3,310
10 to 24	476
25 to 49	156
50 to 99	49
Over 100	20
Total	4,011

### Estimating Motorcoach Industry Activity in 2010

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.