

Motorcoach Census 2012

A Study of the Size and Activity of the
Motorcoach Industry in the United States and Canada in 2011



Prepared for the American Bus Association Foundation
by John Dunham & Associates
February 27, 2014

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Executive Summary

Motorcoach Census 2012 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 2011. The study provides information on the scope and impact of the motorcoach industry that builds upon earlier census research.

In 2011, the motorcoach industry in the United States and Canada consisted of 3,984 companies that operated 40,141 motorcoaches. In the United States, 3,648 companies operated 36,017 motorcoaches and, in Canada, 336 companies operated 4,124 motorcoaches.

Passenger Trips – The motorcoach industry provided 627 million passenger trips in 2011. About 34% of these trips were provided by large companies that operated 100 or more motorcoaches, 24% by mid-size companies operating 25 to 99 motorcoaches and 42% by small companies operating fewer than 25 motorcoaches. The industry moved individual passengers a total of 76.2 billion miles in 2011.

Services – Motorcoach companies offer a diverse variety of services. About 98% of motorcoach companies provided charter service in 2011, 44% provided tour service, 21% provided sightseeing, 25% provided airport shuttle, 22% provided scheduled service, 14% provided special operations, and 10% provided commuter services. Charter service accounted for about 48% of motorcoach service mileage, followed by scheduled service (31%), packaged tour (6%), commuter (5%), airport service (5%), sightseeing (3%), and special operations (3%).

Companies – The majority (94%) of companies were small, and operated fewer than 25 motorcoaches. All told, these firms operated 21,664 motorcoaches, provided 266 million passenger trips, and accounted for 43% of motorcoach mileage. Mid-sized companies, those that operated 25 to 99 motorcoaches, ran 9,295 motorcoaches, provided 149 million passenger trips, and accounted for 23% of the industry’s motorcoach mileage. Large companies that operated over 100 motorcoaches accounted for 23% of the industry’s fleet, provided 34% of the industry’s passenger trips, and 34% of the industry’s motorcoach mileage.

Employment – The motorcoach industry provided jobs to 135,000 people in 2011; 72,000 full-time and 63,300 part-time. On average, a motorcoach company provided 34 jobs or 3.4 jobs per motorcoach. Small companies – those that operated fewer than 25 motorcoaches – provided for 54% of motorcoach industry jobs. Mid-sized companies – those that operated between 25 and 99 motorcoaches – provided for 19% of motorcoach industry jobs. Large companies – those that operated more than 100 motorcoaches – provided for 28% of motorcoach industry jobs.¹

Fuel Efficiency – Considering the amount of passengers served per bus, motorcoaches move people with remarkable fuel efficiency. In 2011, the average fuel efficiency of a motorcoach was 6.3 miles per gallon of fuel. With this fuel efficiency, a motorcoach carrying the industry average of 37.8 passengers achieved 220.8 passenger miles per gallon of fuel in 2011.

Motorcoach Use – On average, a motorcoach provided 15,600 passenger trips in 2011, provided 1.9 million passenger miles, employed 3.4 people, used 8,600 gallons of fuel, and traveled 54,100 miles. About 57% of the

¹ 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, 2012. Available at: <http://www.buses.org/ABA-Foundation/Research/Economic-Impact>

average coach's service mileage was for charter, tour, and sightseeing services and 43% 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 2012

1. Size of the Motorcoach Industry in the United States and Canada in 2011

United States:

Motorcoach carriers.....	3,648
Motorcoaches.....	36,017

Canada:

Motorcoach carriers.....	336
Motorcoaches.....	4,124

Total:

Motorcoach carriers.....	3,984
Motorcoaches.....	40,141

2. Motorcoach Industry Activity in the United States and Canada in 2011

Passenger trips.....	627 million
Passenger miles.....	76.2 billion
Miles traveled.....	2.17 billion
Service miles (miles with passengers).....	2.02 billion
Fuel consumed (gallons).....	345 million
Employment.....	135,100

3. Motorcoach Operating Ratios for 2011

Passenger trips per motorcoach.....	15,600
Passenger miles per motorcoach.....	1.9 million
Miles traveled per motorcoach.....	54,100
Service miles traveled per motorcoach.....	50,200
Passengers per service mile.....	37.8
Miles per gallon of fuel.....	6.3
Passenger miles per gallon of fuel.....	220.8
Employment per motorcoach.....	3.4

4. Demographics of Motorcoach Passenger Trips

Students.....	25.2%
Senior.....	26.2%
All other.....	48.5%

1. Introduction

Motorcoach Census 2012 is a study commissioned by the American Bus Association Foundation to measure the size and activity of the motorcoach transportation service industry in the United States and Canada in calendar year 2011. 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 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 March 2013 through October 2013. A total of 299 usable survey responses from motorcoach carriers were returned to John Dunham & Associates.

John Dunham & Associates research efforts were supported by a number of industry groups, companies, and organizations, including the United Motorcoach Association, Motor Coach Canada, Trailways Transportation System, International Motorcoach Group, Ontario Motor Coach Association, the Quebec Bus Owners Association, ABC Companies, Motor Coach Industries, and Prevost Car. We acknowledge and thank them for their support. We are particularly grateful to the 299 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 2011. 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 2011

Motorcoach Census 2012 reports estimates of the size and activity of the motorcoach transportation services industry in the United States and Canada in calendar year 2011. 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 2011, the motorcoach industry in the United States and Canada consisted of 3,984 carriers and 40,141 motorcoaches (Table 2-1). In the United States, 3,648 carriers operated 36,017 motorcoaches and, in Canada, 336 carriers operated 4,124 motorcoaches. The average carrier operated ten motorcoaches.

Table 2-1

Total Carriers and Motorcoaches in 2011 by Fleet Size

Motorcoach Fleet Size	Carriers		Motorcoaches		Average Number of Motorcoaches	Motorcoaches by Capacity (Passengers)		
	Number	Percent	Number	Percent		30 to 46	47 to 57	Over 58
100 or more	20	0.5%	9,182	22.9%	459	153	8,680	348
50 to 99	49	1.2%	3,242	8.1%	66	198	2,939	110
25 to 49	156	3.9%	6,053	15.1%	39	958	4,788	307
10 to 24	473	11.9%	7,994	19.9%	17	624	7,165	206
1 to 9	3,286	82.5%	13,670	34.1%	4	1,903	11,286	481
Industry Total	3,984	100.0%	40,141	100.0%	10	3,831	34,858	1,452

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

Passenger Trips

The motorcoach industry in the United States and Canada provided 627 million passenger trips in 2011 (Table 2-2). The average carrier provided 157,000 passenger trips and an average motorcoach provided 15,600 passenger trips.

Table 2-2

Motorcoach Passenger Trips in 2011 by Fleet Size

Motorcoach Fleet Size	Passenger Trips		Average Passenger Trips per:	
	Total	Percent	Motorcoach	Carrier
100 or more	211,565,000	33.7%	23,000	10,578,000
50 to 99	67,606,000	10.8%	20,900	1,380,000
25 to 49	81,393,000	13.0%	13,400	522,000
10 to 24	110,640,000	17.6%	13,800	234,000
1 to 9	155,786,000	24.8%	11,400	47,000
Industry Total	626,989,000	100.0%	15,600	157,000

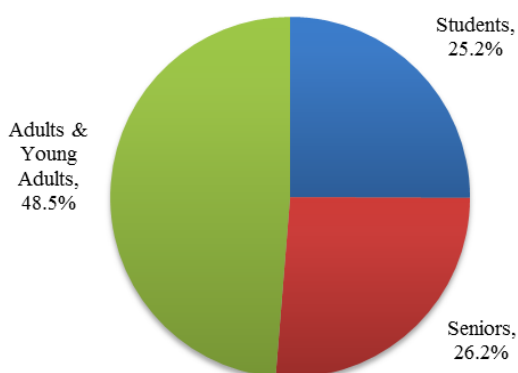
Note: Percentages may not sum to 100% because of rounding.

The largest carriers (100 or more motorcoaches) provided 212 million passenger trips and accounted for 33.7% of passenger trips in 2011, which, on average, amounts to 10.6 million passenger trips per carrier. Motorcoaches operated by large carriers provided an average of 23,000 passenger trips per motorcoach in 2011.

Small carriers with fewer than 25 motorcoaches provided 42.5% of industry passenger trips, which is, on average, 70,900 passenger trips per carrier and 12,300 passenger trips per motorcoach.

The motorcoach industry serves a wide and diverse customer base and is especially vital for students and senior citizens (people 55 years or older).² Students and seniors accounted for 51% of the passenger trips provided by the motorcoach industry in 2011.

Figure 2-1
Passenger Trips by Type of Passenger, 2011



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

Passenger Miles

A passenger mile is defined as one person transported one mile. The motorcoach industry in the United States and Canada provided 76.2 billion passenger miles in 2011 (Table 2-3). On average, each carrier generated 19.1 million passenger miles and each motorcoach generated 1.9 million passenger miles.

Table 2-3
Motorcoach Passenger Miles in 2011 by Fleet Size

Motorcoach Fleet Size	Passengers Miles		Average Passenger Miles per:	
	Number	Percent	Motorcoach	Carrier
100 or more	28,333,068,000	37.2%	3,086,000	1,416,653,000
50 to 99	6,328,530,000	8.3%	1,952,000	129,154,000
25 to 49	9,184,776,000	12.1%	1,517,000	58,877,000
10 to 24	9,951,913,000	13.1%	1,245,000	21,040,000
1 to 9	22,366,827,000	29.4%	1,636,000	6,807,000
Industry Total	76,165,114,000	100.0%	1,897,000	19,118,000

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

The largest carriers (100 or more motorcoaches) accounted for about 37.2% of industry passenger miles. On average, a large carrier accounted for 1.4 billion passenger miles, or 3.1 million passenger miles per motorcoach; the largest of any fleet-size category.

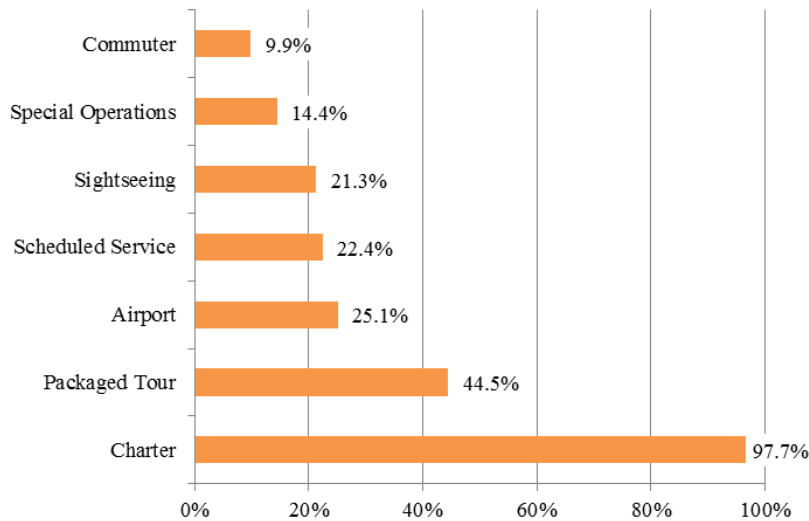
The smallest carriers, those with a fleet size of fewer than 25 motorcoaches, operated the smallest average number (1.5 million) of passenger miles per motorcoach. They averaged 8.6 million passenger miles per carrier for a total of 32.3 billion passenger miles, or 42.4% of industry passenger miles.

² 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.

Services Provided

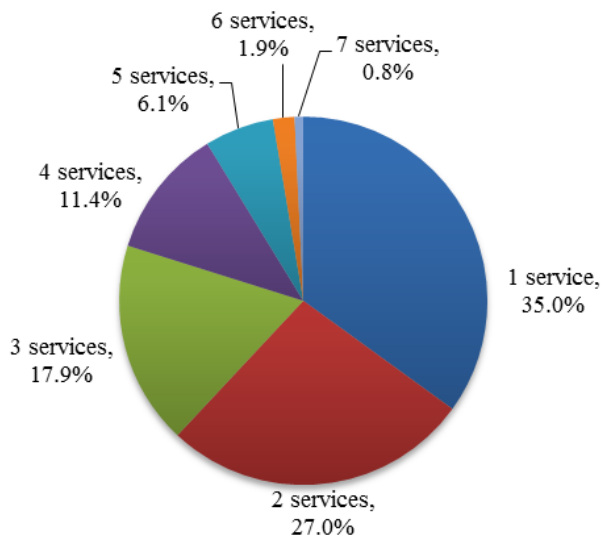
The services offered by the motorcoach industry are diverse. Many carriers offered multiple types of service. Nearly all carriers (97.7%) provided charter service in 2011, followed by tour (44.5%), airport shuttle (25.1%), scheduled service (22.4%), sightseeing (21.3%), special operations (14.4%), and commuter service (9.9%).

Figure 2-2
Percentage of Carriers Providing Types of Service in 2011



In 2011, 65% of carriers provided more than one service. More than one in three (35.0%) carriers had mileage in 2011 for just one service, 27.0% offered two services, 17.9% offered three services, 11.4% offered four services, 6.1% offered five services, 1.9% offered six services, and 0.8% offered all seven services.

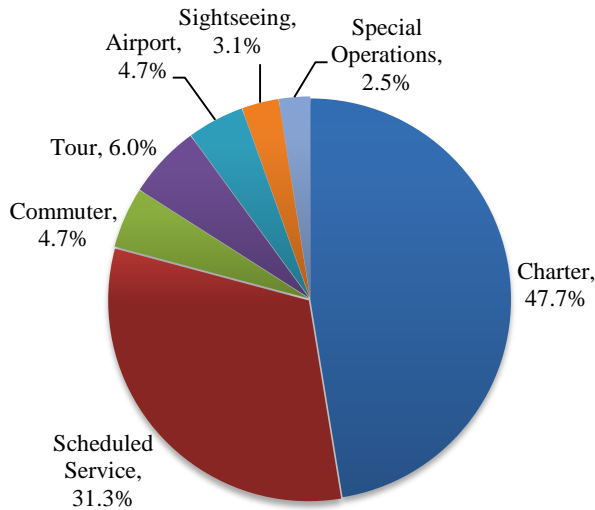
Figure 2-3
Percentage of Carriers by Number of Services Provided in 2011



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

Nearly four out of five, or 79.0% of service miles driven by motorcoaches in 2011 were dedicated to charter and scheduled services. Charter service accounted for 47.7% of the service miles traveled and scheduled route service accounted for 31.3%, followed by packaged tour (6.0%), commuter (4.7%), airport service (4.7%), sightseeing (3.1%) and special operations (2.5%).

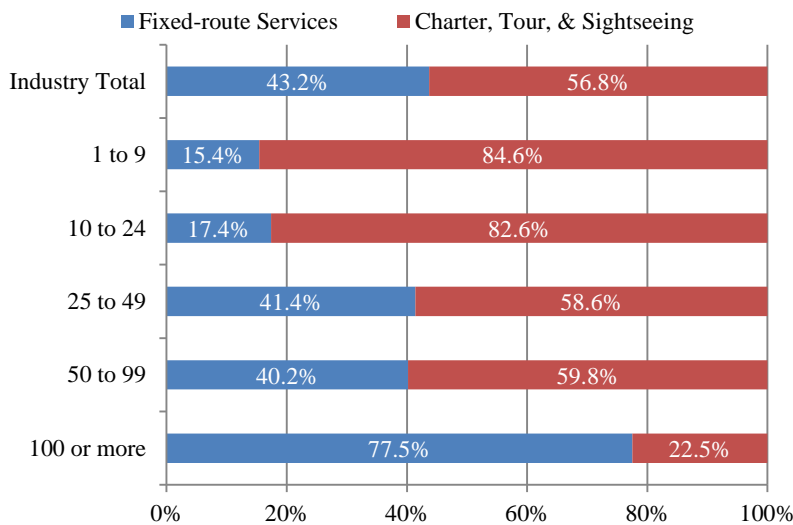
Figure 2-4
Percentage of Motorcoach Service Mileage in 2011 by Type of Service



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

About 56.8% of motorcoach service mileage was accounted for by charter, tour, and sightseeing services, and 43.2% of mileage was accounted for by fixed route services (airport shuttle, commuter, scheduled, and special operations). Fixed-route services' share of motorcoach service mileage increases with fleet-size category, accounting for only 15.4% of mileage for the smallest carriers to 77.5% for the largest carriers.

Figure 2-5
Motorcoach Service Mileage in 2011 by Type of Service and Fleet Size



Vehicle Mileage

Industry motorcoaches traveled 2.17 billion miles in 2011, averaging 545,000 miles per carrier and 54,100 miles per motorcoach. The largest carriers with over 100 motorcoaches averaged 79,900 miles per motorcoach, while the smallest carriers; those with fewer than 10 motorcoaches, averaged 43,900 miles per motorcoach. Service mileage (miles traveled with passengers) accounted for 2.02 billion (92.8%) of the 2.17 billion total miles that motorcoach vehicles traveled in 2011.

Table 2-4
Motorcoach Vehicle Mileage in 2011 by Fleet Size

Motorcoach Fleet Size	Vehicle Mileage		Average Vehicle Mileage per:	
	Number	Percent	Motorcoach	Carrier
100 or more	733,662,000	33.8%	79,900	36,683,000
50 to 99	178,345,000	8.2%	55,000	3,640,000
25 to 49	316,660,000	14.6%	52,300	2,030,000
10 to 24	342,142,000	15.8%	42,800	723,000
1 to 9	600,262,000	27.6%	43,900	184,000
Industry Total	2,171,071,000	100.0%	54,100	545,000

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

Fuel Consumption

Just fewer than 345 million gallons of fuel were consumed by industry motorcoaches in 2011. Each carrier, on average, consumed 87,000 gallons of fuel, or 8,600 gallons per motorcoach. Motorcoach fuel efficiency averaged 6.3 miles per gallon. With this fuel efficiency, a motorcoach carrying the industry average of 37.8 passengers achieved 220.8 passenger miles per gallon in 2011.

Table 2-5
Motorcoach Fuel Consumption in 2011 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	112,435,000	32.5%	12,200	5,622,000	6.5
50-99	29,808,000	8.6%	9,200	608,000	6.0
25 to 49	48,098,000	13.9%	7,900	308,000	6.6
10 to 24	58,299,000	16.8%	7,300	123,000	5.9
1 to 9	96,338,000	27.9%	7,000	29,000	6.2
Industry Total	344,977,000	100.0%	8,600	87,000	6.3

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

Employment

The motorcoach industry in the United States and Canada employed 135,100 people in 2011, averaging 34 employees per carrier and 3.4 employees per motorcoach (Table 2-6). The largest carriers with over 100

motorcoaches averaged 1,900 employees per carrier and 4.1 employees per motorcoach, while the smallest carriers with fewer than 10 motorcoaches averaged 15 employees per company and 3.6 employees per motorcoach.³

Table 2-6
Motorcoach Carrier Employment in 2011 by Fleet Size

Motorcoach Fleet Size	Employment		Average Employment per:	
	Total	Percent	Motorcoach	Carrier
100 or more	37,800	27.9%	4.1	1,888
50 to 99	8,700	6.4%	2.7	177
25 to 49	16,400	17.3%	2.7	105
10 to 24	23,400	17.3%	2.9	50
1 to 9	48,900	36.2%	3.6	15
Industry Total	135,100	100.0%	3.4	34

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

Of the 135,100 people employed by the motorcoach industry in 2011, 72,500 (54.0%) were full-time and 62,700 (46.0%) were part-time (Table 2-7). On a percentage basis, the largest carriers (100 or more motorcoaches) employed more people on a full-time basis (69.2%) than the smallest carriers with fewer than 10 motorcoaches (40.3%).

Table 2-7
Full- and Part-time Employment in 2011 by Fleet Size

Motorcoach Fleet Size	Full-time Employees	Part-Time Employees	Percent Full-time
100 or more	26,100	11,600	69.2%
50 to 99	5,200	3,400	60.6%
25 to 49	9,500	6,900	57.9%
10 to 24	11,900	11,500	50.8%
1 to 9	19,700	29,200	40.3%
Industry Total	72,500	62,700	53.6%

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

Student Motorcoach Tourism

The motorcoach industry provided 121.4 million tourism passenger trips to students in 2011. Students accounted for 29.4% of all tourism passenger trips.⁴ 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 1.5 motorcoach tourism passenger trips in 2011.⁵

³ 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, 2012. Available at: <http://www.buses.org/ABA-Foundation/Research/Economic-Impact>

⁴ 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 (29.4 percent) are higher than student shares of passenger trips by type (25.2 percent) because the latter also includes fixed route services.

⁵ Ibid.

3. Motorcoach Carrier Characteristics

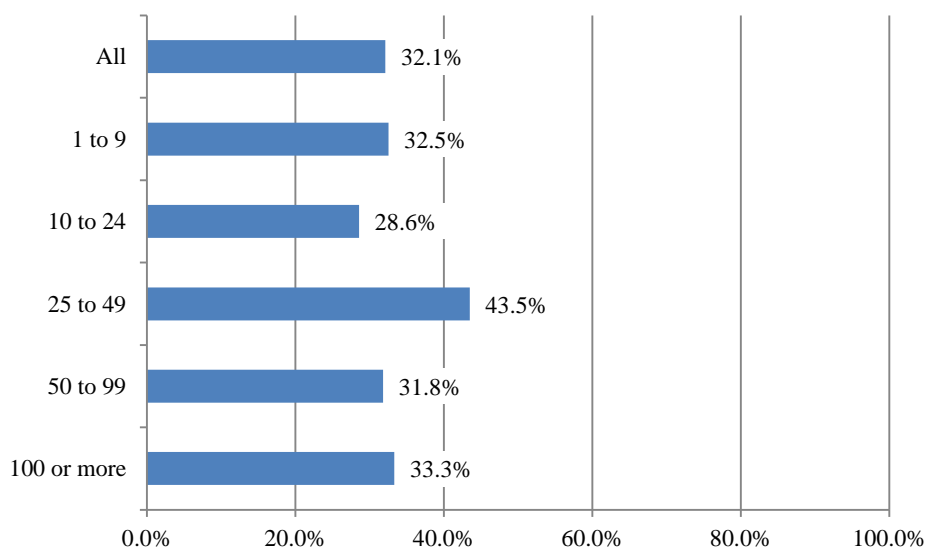
The *Motorcoach Census 2011* survey of motorcoach carriers in the United States and Canada collected additional information on the operating characteristics of the carriers. This chapter presents summary statistics on this information. Included are industry estimates relating to competition from transit 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

Fewer than one in three (32.1%) of the motorcoach carriers in the United States have experienced competition from transit agencies. Of the largest carriers (100 or more motorcoaches), one in three (33.3%) have encountered competition from transit agencies. Nearly one in three (32.5 %) of the smallest carriers have competed with transit agencies for business. More than one in three motorcoaches (35.5%) 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 2011, the average and median motorcoach operated by carriers in the United States and Canada was manufactured in 2003. The average motorcoach operated by the smallest carriers, those with fewer than 10 motorcoaches, was manufactured in 2001. The average motorcoach for carriers with between 10 and 49 motorcoaches was manufactured in 2003, and the average motorcoach operated by carriers with over 50 motorcoaches was manufactured in 2005.

How Motorcoaches Were Acquired

In 2011, 7.4% of motorcoach carriers operated only leased motorcoaches in their fleet, while 68.6% only operated purchased motorcoaches, and 24.1% operated a mix of both (Table 3-1).

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

Motorcoach Fleet Size	Leased Only	Purchased Only	Both	Total
100 or more	0.0%	69.2%	30.8%	100.0%
50 to 99	0.0%	50.0%	50.0%	100.0%
25 to 49	6.1%	63.6%	30.3%	100.0%
10 to 24	1.4%	78.1%	20.5%	100.0%
1 to 9	12.5%	68.4%	19.1%	100.0%
Industry Total	7.4%	68.6%	24.1%	100.0%

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

More than eight in ten (85.5%) of the motorcoaches in the industry were purchased (Table 3-2). Large companies with over 100 motorcoaches owned 93.5% of their vehicles, while small companies with fewer than 10 motorcoaches owned 78.3% of their vehicles.

Table 3-2
Percentages of Motorcoaches Leased Versus Purchased

Motorcoach Fleet Size	Leased	Purchased	Total
100 or more	6.5%	93.5%	100.0%
50 to 99	21.2%	78.8%	100.0%
25 to 49	13.7%	86.3%	100.0%
10 to 24	9.0%	91.0%	100.0%
1 to 9	21.7%	78.3%	100.0%
Industry Total	14.5%	85.5%	100.0%

How Fuel Was Purchased

Over half (53.1%) of carriers in the United States and Canada purchased fuel for their motorcoaches only at retail in 2011, while very few (5.8%) bought only at wholesale, and 41.2% 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 81.5% of the smallest carriers with fewer than 10 motorcoaches purchased fuel only at retail versus 8.0% for the 50-99 motorcoaches fleet-size category. Of the carriers with over 100 motorcoaches that responded to the survey, 83.3% 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	8.3%	8.3%	83.3%	100.0%
50 to 99	8.0%	12.0%	80.0%	100.0%
25 to 49	25.0%	6.3%	68.8%	100.0%
10 to 24	35.2%	5.6%	59.1%	100.0%
1 to 9	81.5%	4.4%	14.1%	100.0%
Industry Total	53.1%	5.8%	41.2%	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, 52.3% of motorcoach fuel was actually purchased at wholesale in 2011 (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 (14.5%) at wholesale, and the largest carriers with over 100 motorcoaches purchased 79.2% of fuel at wholesale.

Table 3-4
Percentages of Motorcoach Fuel Gallons Purchased at Retail or Wholesale

Motorcoach Fleet Size	Retail Gallons	Wholesale Gallons	Total
100 or more	20.8%	79.2%	100.0%
50-99	32.2%	67.8%	100.0%
25-49	41.2%	58.8%	100.0%
10-24	50.5%	49.5%	100.0%
Fewer than 10	85.5%	14.5%	100.0%
Industry Total	47.7%	52.3%	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 3.8% of reporting carriers were founded before 1920 and 11.4% of carriers were founded before 1940. More than one in two carriers (52.6%) were founded in or after 1990, and three in every ten (29.4%) carriers were founded in or after 2000. The average founding year of reporting carriers is 1982, and the median founding year of reporting carriers is 1991. By decade, most carriers were founded in between 2000 and 2009 (24.6%), closely followed by the 1990s (23.2%) and the 1980s (17.6%).

Table 3-5
Percentages of Motorcoach Carriers by Year Founded

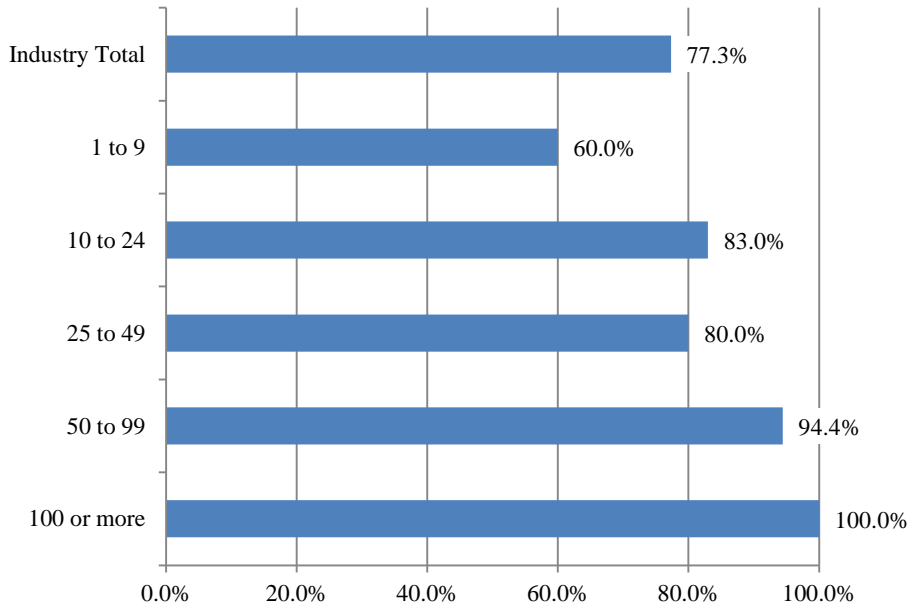
Year Founded	Percent of Carriers
Pre-1920	3.8%
1920-1939	7.6%
1940-1959	9.0%
1960-1979	9.3%
1980s	17.6%
1990s	23.2%
2000-Present	29.4%

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

Other Revenue-Generating Passenger Vehicles

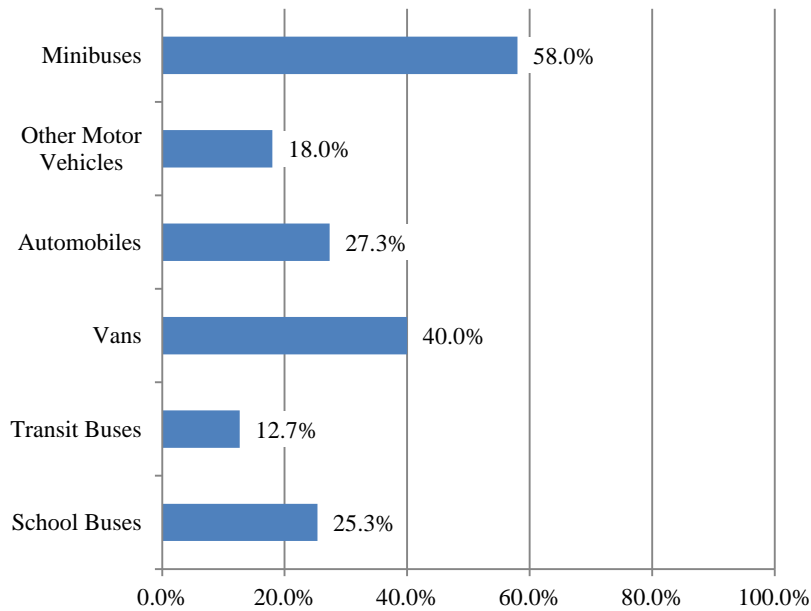
Nearly four out of five (77.3%) of the carriers reported operating other revenue-generating passenger vehicles in addition to their motorcoaches. The largest fleet-size category, carriers operating 100 or more motorcoaches, all operated other passenger vehicles, while six out of ten (60.0%) of the smallest 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, 2011



Almost six in ten reporting carriers (58.0%) operated mini-buses, while 25.3% operated school buses, 12.7% operated transit buses, 40.0% operated vans, 27.3% operated automobiles, and 18.0% operated other motor vehicles.

Figure 3-3
Percentage of Reporting Carriers Operating Other Vehicles by Type, 2011



Appendix A. Study Methodology

The American Bus Association Foundation commissioned *Motorcoach Census 2012* 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 2011. 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 2011.

The industry consists of private-sector organizations that lease/own and operate motorcoaches and offer motorcoach transportation services to the public, including to private and public sector organizations on a contract basis. The industry includes, for example, motorcoach transportation companies that are hired on a contract basis by state or city transit authorities to transport commuters on motorcoaches. The industry excludes, however, governments, transit agencies or other public-sector organizations that lease/own and operate motorcoaches and offer motorcoach transportation services to the public. The industry also excludes private and public sector organizations that lease/own and operate motorcoaches just for their own use, such as businesses that operate motorcoaches to shuttle their employees.

Motorcoach transportation services include motorcoach charter services, tour and sightseeing services using motorcoaches, and motorcoach passenger transportation over regular routes and on regular schedules, such as airport shuttle services, commuter transportation services, and scheduled intercity and rural transportation services. The seven types of motorcoach transportation service that were used in this study are defined below:

- **Charter** – A preformed group (organization, association, tour company, shuttle service, church, school, etc.) who hires a motorcoach for exclusive use under a fixed contract.
- **Packaged/Retail Tour** – A planned or prearranged trip offered for sale by a motorcoach transportation company (including a tour company that leases/owns and operates motorcoaches) at fixed price to leisure travelers. Price usually includes lodging, meals, sightseeing, and transportation.
- **Sightseeing** – A service offered by motorcoach or tour companies to view points of interest within a specified area.
- **Airport Shuttle** – A private motorcoach service usually operating on a fixed route to transport passengers to and from airports.
- **Commuter** – A fixed-route bus service, characterized by service predominantly in one direction during peak periods, limited stops, use of multi-ride tickets, and routes of extended length, usually between the central business district and outlying suburbs.
- **Scheduled** – A specified, ticketed, predetermined regular-route service between cities or terminals.
- **Special Operations** – Published, regular-route service to special events, such as fairs, sporting events, or service for employees to work sites.

A motorcoach, or over-the-road bus (OTRB), is defined for this study as a vehicle designed for long-distance transportation of passengers, characterized by integral construction with an elevated passenger deck located over a baggage compartment. It is at least 35 feet in length with a capacity of more than 30 passengers. This definition

closely matches the definition of an OTRB written into U.S. law, namely “a bus characterized by an elevated passenger deck located over a baggage compartment” (Section 3038 of Public Law 105-178, 49 USC 5310 note). This definition of a motorcoach excludes the typical city transit bus, which is designed for urban and suburban routes, and city sightseeing buses, such as double-decker buses and trolleys.

Survey Frame

In November 2011, John Dunham & Associates assembled a list (i.e., survey frame) of carriers in the United States and Canada that potentially offer motorcoach transportation services to the public. The list was developed using information from the following sources:

- Prior motorcoach census research
- American Bus Association Foundation
- Dun & Bradstreet Inc.
- U.S. Department of Transportation
- United Motorcoach Association

Potential carriers were identified by name, doing business as name, mailing address, contact name, phone number, e-mail address, and fax number.

Outside of the *Motorcoach Census* no comprehensive source of company information on motorcoach operators is publicly available. Data sources often contradict each other, and most listings are either out of date or inaccurate. Companies that operate motor coaches are often combined with transit service providers, companies that operate school buses or firms that use smaller passenger vans. In conducting surveys for the *Motorcoach Census* over the past three years, JDA has had direct contact with over 4,800 separate carriers. Throughout the survey process, JDA identified companies that were no longer in business, did not operate motorcoaches as defined for the purposes of this study, or had disconnected phone numbers and bad addresses. JDA will continue to refine the numbers for future Motorcoach Censuses.

While there have been adjustments to JDA’s earlier estimates, the total number of motorcoach operators has also decreased over the past couple of years, and by directly contacting companies JDA was able to determine a number of companies had gone out of business, merged with other companies, or been acquired by larger companies. JDA estimates that, in 2011, there were 3,648 companies operating in the United States and 336 operating in Canada, for a total of 3,984 companies. This is 0.7% fewer companies than in 2010.

Table A-1

The Motorcoach Industry by Size of Fleet – U.S. and Canada – 2010 and 2011

Fleet Size	Total Carriers	
	2010	2011
1 to 9	3,310	3,286
10 to 24	476	473
25 to 49	156	156
50 to 99	49	49
100 or more	20	20
Total	4,011	3,984

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 in March 2012. 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. Survey respondents were contacted to clarify anomalous answers. The final survey database contained usable responses from 299 motorcoach carriers. Table A-2 presents the sample sizes realized from the returns to the *Motorcoach Census 2012* survey of motorcoach carriers.

Table A-2

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

	Motorcoach Fleet Size					Total
	1 to 9	10 to 24	25 to 49	50 to 49	100 or More	
<i>Number of carriers reporting information</i>						
Total reporting	151	74	34	27	13	299
Employment	137	73	34	26	13	283
Motorcoaches	151	74	34	27	13	299
Fuel	136	73	33	26	13	281
Mileage	98	62	26	23	10	219
Mileage by Service	124	67	32	24	13	260
Passengers by Service	98	60	26	24	11	219
Year Founded	139	68	32	26	12	265
Leased/Purchased Motorcoaches	136	73	33	26	13	268
Wholesale/Retail Gasoline	135	71	32	25	12	263
Other Vehicles	45	47	25	18	12	135
Passenger Demographics	85	58	23	19	7	185

Overall, the margin of error for the survey is 5.5% at a 95% confidence interval.

Estimating the Size of the Motorcoach Industry in 2011

Throughout the survey process, JDA identified companies that were no longer in business, did not operate motorcoaches, or had disconnected phone numbers and bad addresses. JDA assumed that the companies with bad addresses and/or disconnected phone numbers were out of business and did not count them as motorcoach operators.

The Motorcoach Industry by Size of Fleet

In order to determine the size of the motorcoach industry by fleet size, JDA relied upon survey collection efforts. Even in the case of a motorcoach operator that did not wish to complete the survey, JDA attempted to verify the

total motorcoaches operated by the company. As a result, JDA verified the number of motorcoaches operated by 1,019 companies. JDA also identified and targeted the largest companies to verify the exact number of companies (20) that operated over 100 motorcoaches in 2011. 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.

Estimating Motorcoach Industry Activity in 2011

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.