



**AMERICAN BUS ASSOCIATION**

**www.buses.org**

## 2025 Motorcoach Census

This worksheet is intended to assist your team in filling out the correct answers before taking the survey. Do NOT send this worksheet in to ABA; it is for your internal use. Only the information that is submitted to the official survey will be used. Take the survey here: <https://emea.focusvision.com/survey/selfserve/2eb6/250102#?>

### **Introduction**

The Motorcoach Census is a study commissioned by the American Bus Association Foundation (ABAF) to measure the size and activity of the motorcoach transportation service industry in the United States and Canada in 2024. This information is a vital resource for both market analysis and public policy advocacy. All respondents will receive access to the results of the research. All responses will remain confidential and only be reported in aggregate.

### **Definition of the Motorcoach Industry**

For this research, the Motorcoach Industry is defined as:

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

Thank you for your participation in this important research. Please share any questions or feedback with [ofahmy@oxfordeconomics.com](mailto:ofahmy@oxfordeconomics.com). Aggregated and finalized research will be released through the ABA in the spring of 2025.

1. Are you a motorcoach operator?
  - a. Yes
  - b. No
  
2. What types of services does your company offer?
  - a. Charter
  - b. Packaged Tours
  - c. Fixed Route/Scheduled: Urban (5307)
  - d. Fixed Route/Scheduled: Rural (5311 (f))
  - e. Fixed Route/Scheduled: All Other
  - f. Sightseeing
  - g. Commuter
  - h. Special Services/Shuttle

3. How many motorcoaches does your company operate?

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4. How many licensed motorcoach drivers does your firm employ (full-time and part-time)?

Full-time	
Part-time	

5. How many motorcoaches to you expect to acquire in 2025?

.....

6. What will be the means of acquiring the new motorcoaches?
  - a. New Purchase
  - b. New Lease
  - c. Used Purchase
  - d. Used Lease

7. How many motorcoaches to you expect to eliminate in 2025?

.....

8. What will be the means of eliminating motorcoaches?
- a. Selling coaches
  - b. Decommissioning
  - c. Trading-in to manufacturer

9. Do you track fuel usage in liters or gallons?
- a. Liters
  - b. Gallons

10. How many liters of fuel did you use in 2019 and 2024?

2019	
2024	

11. How many gallons of fuel did you use in 2019 and 2024?

2019	
2024	

12. The utilization rate is calculated as the number of vehicles used on revenue-earning service at a particular time (usually peak periods) as a percentage of the number of buses which are available for service at that time (i.e. excluding those undergoing maintenance or repair or not available for other reasons).

What was the average utilization rate by type of service in 2024?

Charter	
Packaged Tours	
Fixed Route/Scheduled: Urban (5307)	
Fixed Route/Scheduled: Rural (5311 (f))	
Fixed Route/Scheduled: All Other	
Sightseeing	
Commuter	
Special Services/Shuttle	

13. Charter days are calculated as the number of days the bus is being utilized.

What was the average number of charter days by type of service in 2024?

Charter	
Packaged Tours	
Fixed Route/Scheduled: Urban (5307)	

Fixed Route/Scheduled: Rural (5311 (f))	
Fixed Route/Scheduled: All Other	
Sightseeing	
Commuter	
Special Services/Shuttle	

14. How many passengers did you carry in total in 2019 and 2024?

2019	
2024	

15. How many miles did your coaches travel in total in 2019 and 2024?

2019	
2024	

16. What was your total revenue (including subsidies) in 2024?

.....

17. What was the percentage of your revenue in 2024 by type of service?  
(Total must add to 100%)

Charter	
Packaged Tours	
Fixed Route/Scheduled: Urban (5307)	
Fixed Route/Scheduled: Rural (5311 (f))	
Fixed Route/Scheduled: All Other	
Sightseeing	
Commuter	
Special Services/Shuttle	

18. What was the percentage of your passengers in 2024 by type of service?  
(Total must add to 100%)

Charter	
Packaged Tours	
Fixed Route/Scheduled: Urban (5307)	

Fixed Route/Scheduled: Rural (5311 (f))	
Fixed Route/Scheduled: All Other	
Sightseeing	
Commuter	
Special Services/Shuttle	

19. What was the approximate percentage of miles/kilometers traveled by type of service?  
(Total must add to 100%)

Charter	
Packaged Tours	
Fixed Route/Scheduled: Urban (5307)	
Fixed Route/Scheduled: Rural (5311 (f))	
Fixed Route/Scheduled: All Other	
Sightseeing	
Commuter	
Special Services/Shuttle	

20. How many day and overnight trips/itineraries did you operate in 2024 by type of service?

	Day trips	Overnight trips
Charter		
Packaged Tours		
Fixed Route/Scheduled: Urban (5307)		
Fixed Route/Scheduled: Rural (5311 (f))		
Fixed Route/Scheduled: All Other		
Sightseeing		
Commuter		
Special Services/Shuttle		

21. Where do you operate?

- a. United States
- b. Canada
- c. Both

22. What data points by state are you able to provide?

- a. Number of passengers

- b. Number of seats
- c. Number of trips/itineraries
- d. Mileage

23. What was the number of passengers you carried in each state in 2024?

AK	
AL	
AR	
AZ	
CA	
CO	
CT	
DC	
DE	
FL	
GA	
IA	
ID	
IL	
IN	
KS	
KY	
LA	
MA	
MD	
ME	
MI	
MN	
MO	
MS	
MT	
NC	
ND	
NE	
NH	
NJ	
NM	
NV	
NY	
OH	
OK	
OR	
PA	

RI	
SC	
SD	
TN	
TX	
UT	
VA	
VI	
VT	
WA	
WI	
WV	
WY	

24. What was the number of seats occupied in each state in 2024?

AK	
AL	
AR	
AZ	
CA	
CO	
CT	
DC	
DE	
FL	
GA	
IA	
ID	
IL	
IN	
KS	
KY	
LA	
MA	
MD	
ME	
MI	
MN	
MO	
MS	
MT	
NC	
ND	
NE	

NH	
NJ	
NM	
NV	
NY	
OH	
OK	
OR	
PA	
RI	
SC	
SD	
TN	
TX	
UT	
VA	
VI	
VT	
WA	
WI	
WV	
WY	

25. What was the number of trips/itineraries in each state in 2024?

AK	
AL	
AR	
AZ	
CA	
CO	
CT	
DC	
DE	
FL	
GA	
IA	
ID	
IL	
IN	
KS	
KY	
LA	
MA	
MD	



ME	
MI	
MN	
MO	
MS	
MT	
NC	
ND	
NE	
NH	
NJ	
NM	
NV	
NY	
OH	
OK	
OR	
PA	
RI	
SC	
SD	
TN	
TX	
UT	
VA	
VI	
VT	
WA	
WI	
WV	
WY	

26. What was your mileage in each state in 2024?

AK	
AL	
AR	
AZ	
CA	
CO	
CT	
DC	
DE	
FL	
GA	

IA	
ID	
IL	
IN	
KS	
KY	
LA	
MA	
MD	
ME	
MI	
MN	
MO	
MS	
MT	
NC	
ND	
NE	
NH	
NJ	
NM	
NV	
NY	
OH	
OK	
OR	
PA	
RI	
SC	
SD	
TN	
TX	
UT	
VA	
VI	
VT	
WA	
WI	
WV	
WY	

27. What data points by province are you able to provide?

- a. Number of passengers
- b. Number of seats
- c. Number of trips/itineraries
- d. Mileage

28. What was the number of passengers you carried in each province in 2024?

AB	
BC	
MB	
NB	
NL	
NT	
NS	
NU	
ON	
PE	
QC	
SK	
YT	

29. What was the number of seats occupied in each province in 2024?

AB	
BC	
MB	
NB	
NL	
NT	
NS	
NU	
ON	
PE	
QC	
SK	
YT	

30. What was the number of trips/itineraries in each province in 2024?

AB	
BC	
MB	
NB	
NL	

NT	
NS	
NU	
ON	
PE	
QC	
SK	
YT	

31. What was your mileage in each province in 2024?

AB	
BC	
MB	
NB	
NL	
NT	
NS	
NU	
ON	
PE	
QC	
SK	
YT	

32. Please provide your contact details below:

- Name:
- Title:
- Organization:
- Email:
- Phone Number:
- Address: