

American Bus Association

2026 Bus Census

Introduction

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 2025. 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

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.

Definition of the 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.

Thank you for your participation in this important research. Please share any questions or feedback with ofahmy@oxfordeconomics.com. Aggregated and finalized research will be released through the ABA in the spring of 2026.

(All questions except Q1 and Q34 should be optional)

1. Are you a motorcoach operator?

- a. Yes
- b. No

(Single select MCQ; if Yes, proceed to Q2, if No, end survey)

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

(Multi select MCQ; answers determine the options in answer tables for questions 10, 18, and 20-22)

3. How many motorcoaches does your company operate?

.....

(Open-ended numeric answer)

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

Full-time	
Part-time	

(Open-ended numeric answer)

5. How many non-driver staff (e.g. dispatchers, mechanics, admin) does your firm employ?

Full-time	
Part-time	

(Open-ended numeric answer)

6. What was your total payroll expenditure in 2025 (including benefits)?

.....

(Open-ended numeric answer)

7. Do you track fuel usage in liters or gallons?

- a. Liters
- b. Gallons

(Single select MCQ; if a, go to 8, if b, go to 9)

8. How many liters of fuel did you use in 2025?

(Open-ended numeric answer)

9. How many gallons of fuel did you use in 2025?

(Open-ended numeric answer)

10. Load factor is calculated as the percentage of available seats that were occupied by paying passengers.

What was your average seat occupancy rate (load factor) by type of service in 2025?

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

(Open-ended numeric answer; maximum 100%)

11. How many passengers did you carry in total in 2025?

(Open-ended numeric answer)

12. How many miles did your coaches travel in total in 2025?

(Open-ended numeric answer)

13. What was your total revenue (including subsidies) in 2025?

.....

☐ Cannot disclose

(Open-ended numeric answer)

14. Did your company receive any public subsidies, grants, or government financial assistance during the reporting year?

☐ Yes

☐ No

(Single select MCQ; if Yes, proceed to Q15, if No, proceed to Q16)

15. Please specify the total amount received:

.....

☐ Cannot disclose

(Open-ended numeric answer)

(Open-ended numeric answer)

16. What was the percentage of your revenue in 2025 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	

(Show error message if total does not add up to 100%)

17. What was your total operating cost in 2025?

.....

☐ Cannot disclose

(Open-ended numeric answer)

18. Please estimate the percentage breakdown of your 2025 operating costs by category:
(Total must add to 100%)

Driver and staff wages	
Fuel	
Maintenance and repairs	
Insurance	
Licensing and regulatory compliance	
Vehicle depreciation	
Leasing or financing costs	
Marketing and sales	
Other (please specify)	

(Show error message if total does not add up to 100%)

19. What was your total capital expenditure in 2025 (e.g. vehicle purchases, facility upgrades)?

.....

☐ Cannot disclose

(Open-ended numeric answer)

20. What was the percentage of your passengers in 2025 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	

(Show error message if total does not add up to 100%)

21. 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	

(Show error message if total does not add up to 100%)

22. How many day and overnight trips/itineraries did you operate in 2025 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		

(Open-ended numeric answer)

23. Where do you operate?
- United States
 - Canada
 - Both

(Single select MCQ; if answer is “a” or “c”, proceed to Q28, if “b”, proceed to Q33)

24. 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

(Multi select MCQ; answer determines following questions: if “a”, go to 25, if “b”, go to 26, if “c”, go to 27, if “d”, go to 28)

25. What was the number of passengers you carried in each state in 2025?

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	

(Open-ended numeric answer)

26. What was the number of seats occupied in each state in 2025?

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	

(Open-ended numeric answer)

27. What was the number of trips/itineraries in each state in 2025?

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	

(Open-ended numeric answer)

28. What was your mileage in each state in 2025?

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	

(Open-ended numeric answer)

29. 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

(Multi select MCQ; answer determines following questions: if “a”, go to 30, if “b”, go to 31, if “c”, go to 32, if “d”, go to 33)

30. What was the number of passengers you carried in each province in 2025?

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

(Open-ended numeric answer)

31. What was the number of seats occupied in each province in 2025?

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

(Open-ended numeric answer)

32. What was the number of trips/itineraries in each province in 2025?

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

(Open-ended numeric answer)

33. What was your mileage in each province in 2025?

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

(Open-ended numeric answer)

34. Please provide your contact details below:

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