

MOTORCOACH industry by the numbers

Datapoints showing how
motorcoaches benefit America

Prepared in conjunction with



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Federal fuel tax exemption for motorcoaches

Congress wisely chose many years ago to fully exempt fuel used in motorcoaches, municipal transit and school buses from federal fuel tax to encourage greater use of mass transportation. As a result of subsequent fuel tax increases, motorcoaches now pay 7.4 cents of the 24.4 cents per gallon Federal fuel tax. Motorcoaches reduce congestion, alleviate roadway wear, reduce pollution, conserve fuel, and provide access to travel and tourism venues. The rationale for the Federal motorcoach fuel tax exemption is even more compelling today and the exemption should be fully restored as originally envisioned by Congress. If Congress chooses to increase the federal fuel tax, absent a return to zero for motorcoaches, the industry seeks exemption from any increase. If Congress chooses to ultimately transition to a vehicle mile traveled (VMT) tax, motorcoaches should have full parity with municipal transit

- **Motorcoaches reduce highway congestion:** One motorcoach carries an average of 36 people who may well choose to travel by personal automobile. If all travelers on motorcoaches took personal autos instead of a motorcoaches, the result could add over 65 billion miles of personal auto travel on already congested highways throughout the country. Motorcoach operations save travelers \$544.43 million annually by alleviating congestion on local roads, city streets and major arteries by removing cars from travel lanes and adding productivity to the workforce.
- **Motorcoaches generate much less wear on roads than long-haul trucks:** The average gross vehicle weight of a fully loaded motorcoach is 50,000 pounds as opposed to 80,000 for a semi-trailer. By replacing personal vehicles on the roads, each motorcoach reduces the wear on roads by 94,000 pounds.
- **Motorcoaches reduce pollution:** Nationwide, motorcoaches have the lowest carbon footprint of 12 different forms of passenger transportation, including all types of automobiles, rail and jets. The carbon footprint for motorcoaches is .17 pounds of CO2 per passenger mile. (Union of Concerned Scientists report: Getting There Greener: The Guide to Your Lower-Carbon Vacation"). Moreover, motorcoaches are constantly moving to cleaner diesel vehicles through millions of dollars spent on retrofits and replacement of older buses. Motorcoaches are the industry fuel conservation leader achieving 240 passenger miles per gallon of fuel (commuter rail 90, transit bus 70, hybrid cars 50 and automobiles 28). (Updated Comparison of Energy Use and CO2 Emissions from Different Transportation Modes, M.J. Bradley and Associates, March 2014)
- **Motorcoaches save fuel:** Motorcoaches are the most fuel-efficient transportation mode in the United States when measured in terms of passenger miles per gallon of fuel. By replacing 36 individual vehicles, each motorcoach saves about 87,652 gallons of gas annually. Altogether, our country saves over 2.5 billion gallons of fuel every year through motorcoaches. Motorcoaches move people with little fuel. The average fuel efficiency of a motorcoach is 6.1 miles per gallon of fuel. With this fuel efficiency, a motorcoach carrying the industry average of 36 passengers achieved 240 passenger miles per gallon of fuel.
- **Motorcoaches provide access to travel and tourism venues and contribute to the national economy:**
 - Motorcoach traveler and tourist demand generates more than \$88.74 billion annually in total direct economic impact.
 - The motorcoach and group travel industry generates a total of \$33.6 billion in tax revenue, \$20.2 billion in Federal taxes and \$13.4 billion in State taxes.
 - The demand for goods and services created by motorcoach travel, combined with new motorcoach sales and industry equipment purchases, generates employment for 1,144,697 people.
 - The motorcoach industry makes 258,286,600 passenger trips annually with little to no public subsidy.
 - The motorcoach industry is made up of nearly 3,628 businesses, nearly 80 percent of which operate fewer than 10 vehicles.
 - The total industry fleet of 36,520 vehicles provides charter, tour, sightseeing, airport shuttle, commuter, and scheduled services.
- **Motorcoaches are SAFE:** In 2017 there were 37,133 fatalities annually on our Nation's highways while motorcoaches accounted for an average of 20 or less fatalities annually, second only to school buses.
- The Federal motorcoach fuel tax exemption value is estimated at \$64 million annually, a small sum compared to the financial, environmental and social impact rendered by motorcoaches.



MOTORCOACHES: CHAMPIONS OF SAFETY & EFFICIENCY

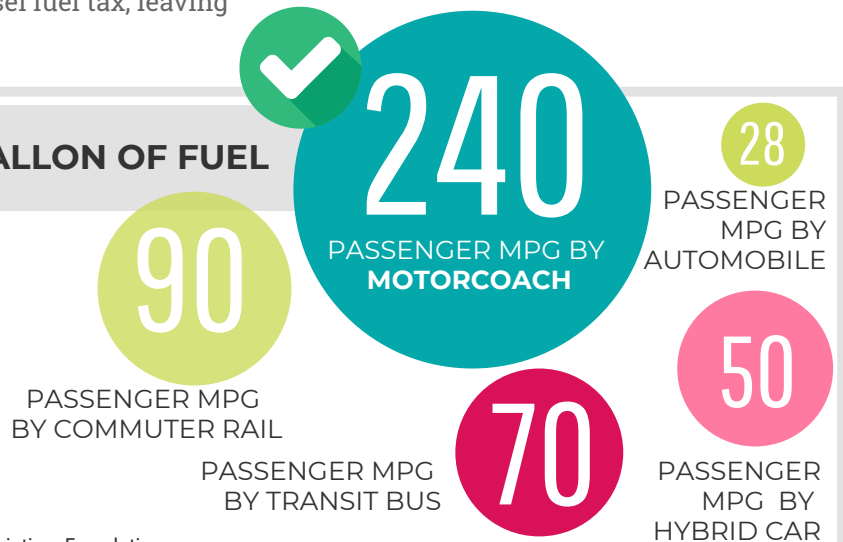
To encourage greater use of mass transportation, Congress wisely chose to exempt fuel used in motorcoaches from the federal excise tax. Today, the law provides a 17 cent per gallon exemption from the current 24.4 cent per gallon Federal diesel fuel tax, leaving motorcoaches to pay 7.4 cents per gallon.

BUS PASSENGERS GO FARTHEST ON A GALLON OF FUEL

Motorcoaches are the industry fuel conservation leader achieving 240 passenger miles per gallon of fuel! *

Nationwide, motorcoaches have the lowest carbon footprint among 12 different forms of transportation, including all types of automobiles, rail and jets. The "carbon footprint" for motorcoaches is .17 pounds of CO2 per passenger mile.

* 2015 Motorcoach Census, John Dunham & Associates for the American Bus Association Foundation



MORE MOTORCOACHES, MORE JOBS

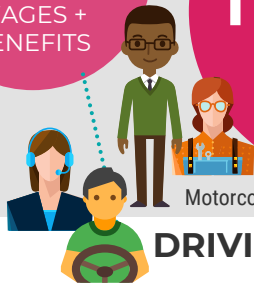
\$54,310
AVG DRIVER
WAGES +
BENEFITS

112,702
SKILLED
JOBS

For every motorcoach on the road, 3.5 jobs are created. 34,885 motorcoaches in operation in the U.S. today are driving local economies by supporting 12,702 good, skilled jobs. The average wage and benefits package for a driver is \$54,310.

FUN FACT: Most carriers, 81%, operate small fleets of 1-9 motorcoaches. These small businesses bring jobs, prosperity, and transportation options to communities.

2015 Motorcoach Census, John Dunham & Associates for the American Bus Association Foundation

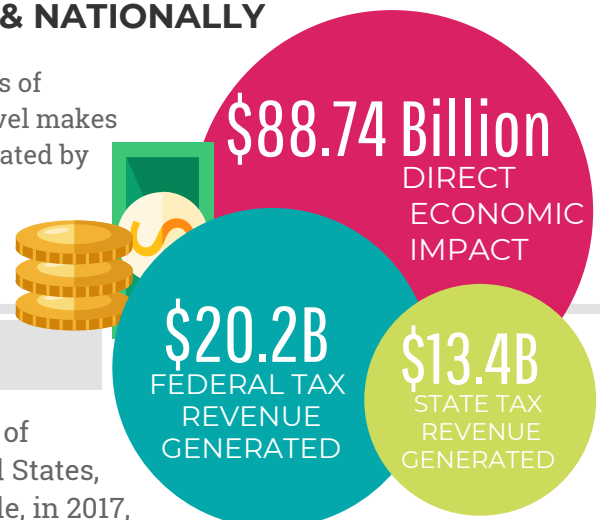


Motorcoach Impact Study, American Bus Association Foundation

DRIVING THE U.S. ECONOMY, LOCALLY & NATIONALLY

Motorcoaches provide access to travel and tourism venues and contribute tens of billions of dollars to national and local economies. Motorcoach and group travel makes a \$88.74 billion direct economic impact. Demand for goods and services generated by motorcoach travel, combined with new coach sales and industry equipment purchases, generates employment for 1,144,697 people.

Motorcoach Impact Study, American Bus Association Foundation



37,133

TOTAL US TRAFFIC FATALITIES ON HIGHWAYS

U.S. Department of Transportation, NHTSA, 2017 Roadway Fatalities

MOTORCOACHES ARE SAFE

Motorcoach travel is a very safe mode of highway transportation in the United States, according to a DOT report. For example, in 2017, there were 37,133 fatalities on the nation's highways. Motorcoaches accounted for an average of 18, roughly one-half of one percent.

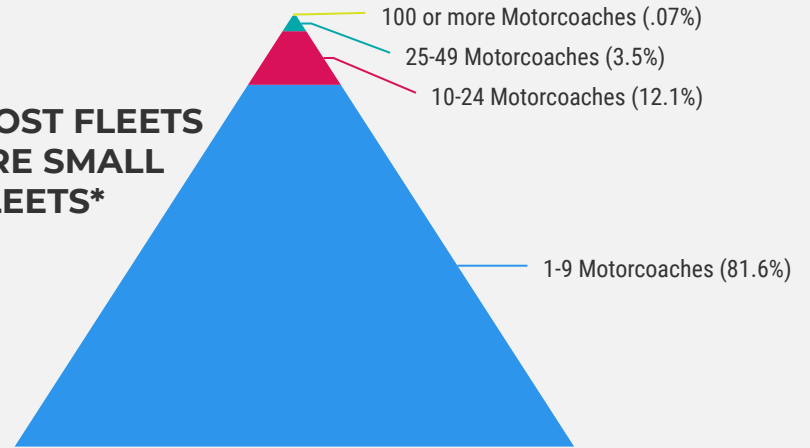
18 motorcoach occupants U.S. Department of Transportation, FMCSA, Analysis Division, 2007-2016

MOTORCOACH industry by the numbers

THE SCOPE OF THE INDUSTRY*

U.S. Motorcoach Carriers.....	2,990
Motorcoaches.....	34,885
Employment.....	112,702
Passenger Trips.....	596.4 million
Passenger Miles.....	69.6 billion
Miles Traveled.....	1.5 billion
Average carrier provided.....	182,711 passenger trips
Avg motorcoach provided.....	15,404 passenger trips

MOST FLEETS ARE SMALL FLEETS*



* 2015 Motorcoach Census, John Dunham & Associates for the American Bus Association Foundation

ENVIRONMENTALLY FRIENDLY



Clean machines! Thanks to EPA regulations, diesel engines manufactured today are cleaner than ever before. (U.S. Environmental Protection Agency)

Motorcoaches leave carbon in the dust!

A couple traveling on a motorcoach will generate nearly 50 percent less global warming pollutants than they would driving a hybrid car.

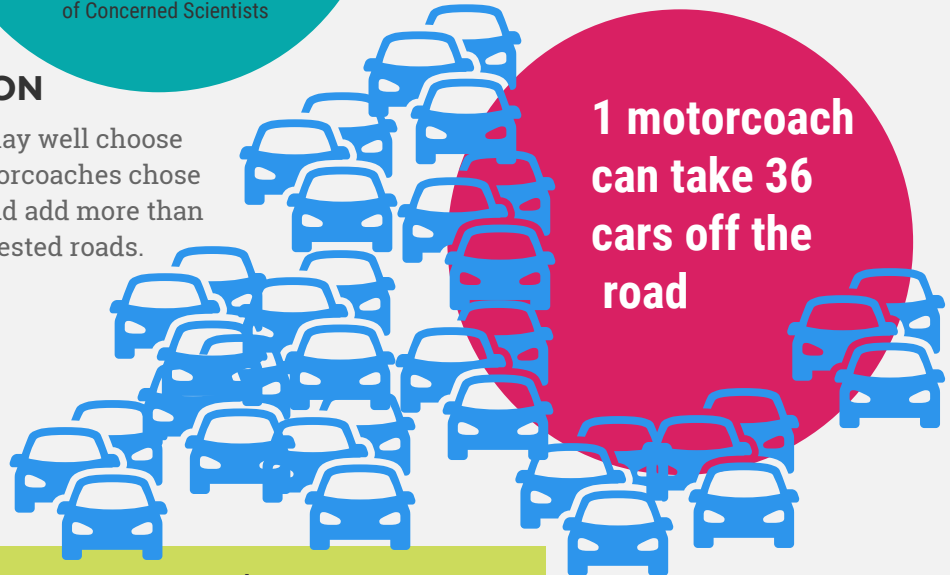
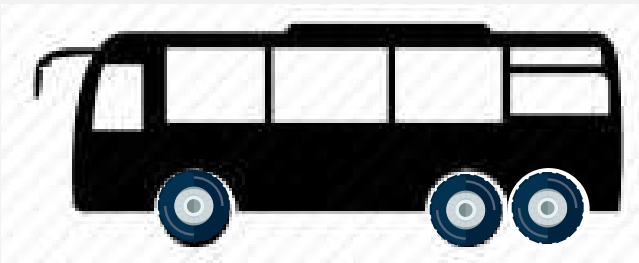
Getting There Greener: The Guide to Your Lower Carbon Vacation, Union of Concerned Scientists

CLEAN AND EFFICIENT

Cleaner diesel fuel, advanced engines, and effective emissions control technology make up a new generation of diesel. (<https://www.dieselforum.org>)

MOTORCOACHES REDUCE CONGESTION

One motorcoach carries an average of 36 people who may well choose to travel by personal automobile. If all travelers on motorcoaches chose personal autos instead of motorcoaches, the result could add more than 65 billion miles of personal auto travel on already congested roads.



FUN FACT: Motorcoach operators save travelers \$544 million annually by alleviating congestion on local roads, city streets, and major arteries by removing cars from travel lanes and adding productivity to the workforce.

2015 Motorcoach Census, John Dunham & Associates for the American Bus Association Foundation



The United Motorcoach Association is the nation's largest organization exclusively protecting and promoting the interests and welfare of privately-owned bus and motorcoach companies. Members include motorcoach owners and industry suppliers.

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