Motorcoach Top 50
Diversify to Boost Business

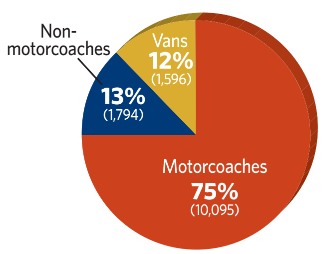
Once again, Dallas-based Coach America rolls in at the top in *METRO*'s annual motorcoach survey. Despite the lagging economy, two-thirds of carriers reported a substantial increase in business.

>BY NICOLE SCHLOSSER, Associate Editor

THE MAJORITY OF OPERATORS SURVEYED REPORTED that business was up in 2008. Thirty-three out of 50 carriers shared this news, with the average spike hovering around 10 percent. For the six operators who saw business decrease, that dip averaged approximately 12 percent.

Part of what boosted business for many operators may be attributed to widely-reported efforts to procure government and school contracts, at 40 percent and 36 percent respectively. Less than 20 percent sought out co-ops with other providers, down slightly from last year's 28 percent, and only 12 percent diversified with limousine or paratransit service.

Total Fleet Size — 13,485



This year, there are 11,889 motorcoaches and buses represented in our listing. Motorcoaches made up the largest section with a 75 percent share.

Some other services that carriers cited that they have offered to drum up additional business were, "airport shared rides, professional sports team transportation, public-private partnerships, transit charters, and diversification into tour and travel."

Belt-tightening tactics included rate increases at 68 percent, with fuel surcharges coming in a close second at 54 percent. Very few carriers resorted to staff downsizing, at only 12 percent, down from 21 percent last year. Conservation emerged among a small section of surveyed carriers as a solution for dealing with the economic downturn. Four percent listed these budget-cutting actions: "reducing horsepower and top speed, controlling purchases and expenses, taking measures on unnecessary bus moves and idling, selling excess equipment and coaching drivers to use less fuel."

Word-of-mouth surpassed all other marketing methods listed by reporting coach operators, at 62 percent. Internet use showed up a very distant second with 30 percent. Significantly less energy is being devoted to print ads, at just 18 percent, and even less to radio and TV ads, with only 12 percent reporting using this method to reach potential customers. Four operators responded that they include face-to-face contact in their marketing, including outside sales contacts and personal visits.

Driver recruitment and retention remains the top hurdle for 40 percent of respondents. However, this number is down 20 percent from last year; this may be a result of the higher incidence of unemployment pushing more workers into the field seeking driving positions, as was noted by one survey respondent. The economy, as expected, came in as the second greatest challenge, at 20 percent.

Other challenges cited were meeting growing customer demand for "new onboard entertainment equipment, larger buses" ; and concern over being able to meet the upcoming emissions standards as well as new regulations, such as, "the continual threat of seat belts, hours of service changes, etc." Sixty percent of carriers listed their main source of competition as local operators, while other competitors ranged from a nearby transit operation to curbside operators.

RANKING BREAKDOWN

A total of 13,485 vehicles, excluding vans (1,596) made up this year's list. Motorcoaches totaled 10,095, 75 percent, while non-motorcoach buses came in at 1,794, or 13 percent. The average fleet size for operators is 270, with a median of 113. Thirty-six of the surveyed carriers plan to purchase new vehicles in the coming year. Altogether, operators say they anticipate buying 548 new and 115 used vehicles in 2009, slightly up from last year.

Three major players, once again, dominated the list in fleet totals. **Coach America** held strong again this year as the largest fleet, with a total of 2,023 vehicles in 2008, a small bump up from their 2007 total. Again, coming in second, was **Coach USA**, reporting a total of 1,800 vehicles. **Greyhound Lines** held onto the spot for third-largest fleet in our survey, at 1,332 vehicles. The total fleet size for these operators comprised a considerable 45 percent of the Top 50 fleet total. A few small shifts and some new additions, including San Diego-based **Sundiego Charter Co.**, **Birnie Bus Service** in Rome, N.Y., and Staunton, Va.-based **Quick's Bus Company** changed the make-up of the list.

Ranking 2009	Ranking 2008	Company Name Location	Total Buses and Coaches	Motorcoaches	Non-Motorcoach Buses	Total 40-Foot Buses and Coaches	Total Shorter Than 40 Ft.	Total Longer Than 40 Ft.	Plus/Minus 2008	Vans
1	1	**Coach America** Dallas	2,023	1,634	389	120	350	N/A	58	1,004
2	2	**Coach USA** Paramus, N.J.	1,800	1,550	250	23	42	1485	150	15
3	3	**Greyhound Lines** Dallas	1,332	1,332	0	0	0	0	66	0
4	4	**Pacific Western Transportation Ltd.** Toronto	669	579	90	149	10	420	30	80
5	5	**Academy Express LLC** Hoboken, N.J.	626	623	3	350	29	244	13	7
6	6	**Greyhound Canada** Calgary, Alberta	466	466	0	0	0	0	30	0
7	8	**Holland America Line Inc.** Seattle	420	324	96	285	39	96	76	51
8	7	**Coach Canada** Peterborough, Ontario	365	220	145	90	30	245	-35	20
9	10	**Peter Pan Bus Lines** Springfield, Mass.	272	241	31	16	31	225	-2	0
10	11	**Martz Group** Wilkes-Barre, Pa.	250	246	4	0	4	246	-21	1
11	9	**Robert's Hawaii** Honolulu	228	141	87	32	102	94	-61	76
12	13	**Mears Transportation** Orlando, Fla.	201	201	0	6	0	177	-10	80
13	14	**Arrow Stage Lines** Omaha, Neb.	192	177	15	17	0	177	5	16
14	17	**MTR Western** Seattle	167	167	0	7	9	151	22	0
15	16	**Dattco Inc.** New Britain, Conn.	159	79	80	32	52	75	12	4
16	15	**Polynesian Adventure Tours** Honolulu	156	110	46	39	46	61	-9	11
17	19	**Paul Revere Transportation LLC** Chelsea, Mass.	143	19	124	85	40	17	20	44
18	-	**Adirondack Transit Lines** Hurley, N.Y.	125	125	0	31	0	94	N/A	0
18 (tie)	12	**Princess Tours** Seattle	125	105	20	54	8	51	-107	83
20	18	**Krapf Coaches Inc.** West Chester, Pa.	121	19	102	13	100	8	-4	3
21	21	**Le Bus** Salt Lake City	119	114	5	54	6	54	3	4
22	22	**Compass Transportation** San Francisco	116	60	56	60	103	16	5	3
23	28	**Gray Line Tours of Nashville** Nashville, Tenn.	109	83	26	0	26	57	35	0
24	23	**Charter Bus Lines of B.C.** Vancouver, B.C.	105	94	11	49	4	43	7	1
25	25	**Capital/Colonial Trailways** Montgomery, Ala.	94	94	0	25	4	65	4	0

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25 (tie)	-	**El Camino Trailways** South San Francisco, Calif.	92	46	46	15	16	16	74	0
27	24	**All Aboard America** Mesa, Ariz.	92	92	0	14	15	63	-3	5
28	31	**Lakeland Bus Lines** Dover, N.J.	73	72	1	5	1	67	1	0
29	28	**Trans-Bridge Lines Inc.** Bethlehem, Pa.	72	72	0	10	4	62	-2	1
30	32	**Carl R. Bieber Tourways** Kutztown, Pa.	71	63	8	23	7	41	1	2
31	30	**Abbott Trailways** Roanoke, Va.	70	63	7	10	7	53	-3	1
31 (tie)	-	**Birnie Bus Service Inc.** Rome, N.Y.	70	23	47	6	53	17	N/A	47
33	34	**Holiday Companies LLC** Randleman, N.C.	68	62	6	5	6	57	5	1
34	37	**Vandalia Bus Lines** Caseyville, Ill.	67	56	11	21	11	35	7	2
35	33	**Red Carpet Charters** Oklahoma City	65	65	0	0	2	63	-	0
36	-	**American Consolidated Transportation Companies Inc.** Elk Grove Village, Ill.	62	52	10	113	9	1	N/A	3
36 (tie)	35	**Premier Coach Company Inc.** Colchester, Vt.	62	60	2	6	5	49	1	2
38	38	**Peoria Charter Coach Co.** Peoria, Ill.	59	59	0	10	0	49	-	0
39	-	**Colonial Coach Lines** Mt. Prospect, Ill.	58	48	10	22	8	26	N/A	2
40	39	**Starline Luxury Coaches** Seattle	56	22	34	3	37	16	2	2
41	44	**Fullington Auto Bus Co.** Clearfield, Pa.	52	51	1	26	10	25	3	5
42	40	**Plymouth & Brockton Street Railway Co.** Plymouth, Mass.	50	42	8	22	8	20	-3	0
42 (tie)	-	**Quick's Bus Co.** Staunton, Va.	50	50	0	35	0	15	N/A	1
42 (tie)	-	**Sundiego Charter Co.** San Diego	50	50	0	6	0	44	N/A	0
45	42	**Ramblin Express Inc.** Colorado Springs, Colo.	49	31	18	2	18	29	-1	6
46	44	**Annett Bus Lines** Sebring, Fla.	46	46	0	17	0	29	-3	0
46 (tie)	46	**Gold Coast Tours** Brea, Calif.	46	44	2	16	1	27	-2	2
48	48	**Eyre Bus, Tour & Travel** Glenelg, Md.	45	45	0	14	4	27	2	2
49	48	**International Stage Lines** Richmond, B.C.	43	40	3	22	3	15	-	0
50	35	**James River Bus Lines** Richmond, Va.	38	38	0	25	22	13	-23	9