

# 2024


# Economic Impact of Motorcoach Travel in New York

Conducted by:



Prepared for:



A white motorcoach is driving on a multi-lane highway. The sky is blue with scattered white clouds. The road has a guardrail on the right side. The text "Total Motorcoach Economic Impacts" is overlaid in white, bold font. A blue horizontal line is positioned above the word "Total".

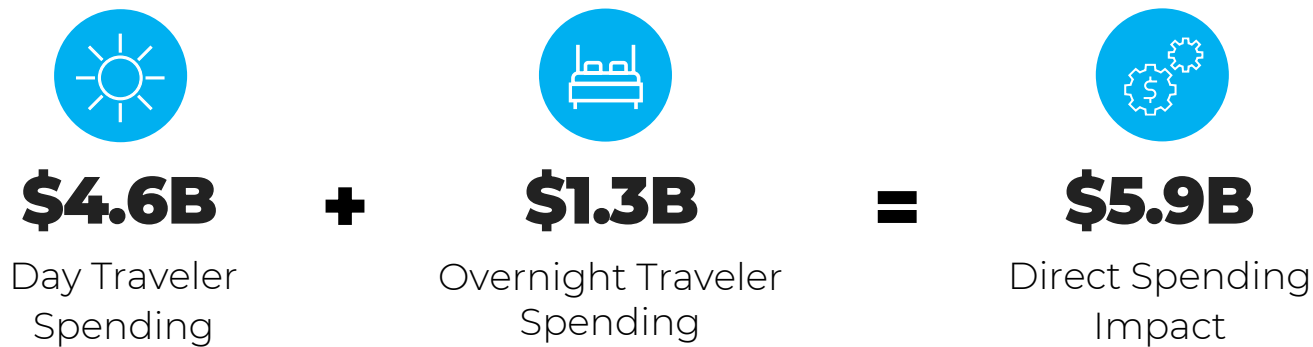
# Total Motorcoach Economic Impacts

# Key Findings

## Direct Spending Impacts

On behalf of the American Bus Association, Tourism Economics conducted a detailed economic impact analysis that quantifies the important role of motorcoach travel. Motorcoach services refer to all forms of transportation using motorcoaches, divided into two distinct categories. The first is group travel, which involves people traveling together on private charters, group tours, and sightseeing excursions. The second is scheduled service, a type of public transportation that operates on published timetables along specific routes, providing intercity and airport-to-city transportation.

Motorcoach travel in New York recorded an estimated 3.1 billion passenger miles in 2024, supporting significant economic impacts in the state. Direct spending by motorcoach travelers amounted to \$5.9 billion in 2024, including spending on motorcoach transportation as well as a range of goods and services, such as accommodations and food and beverages.

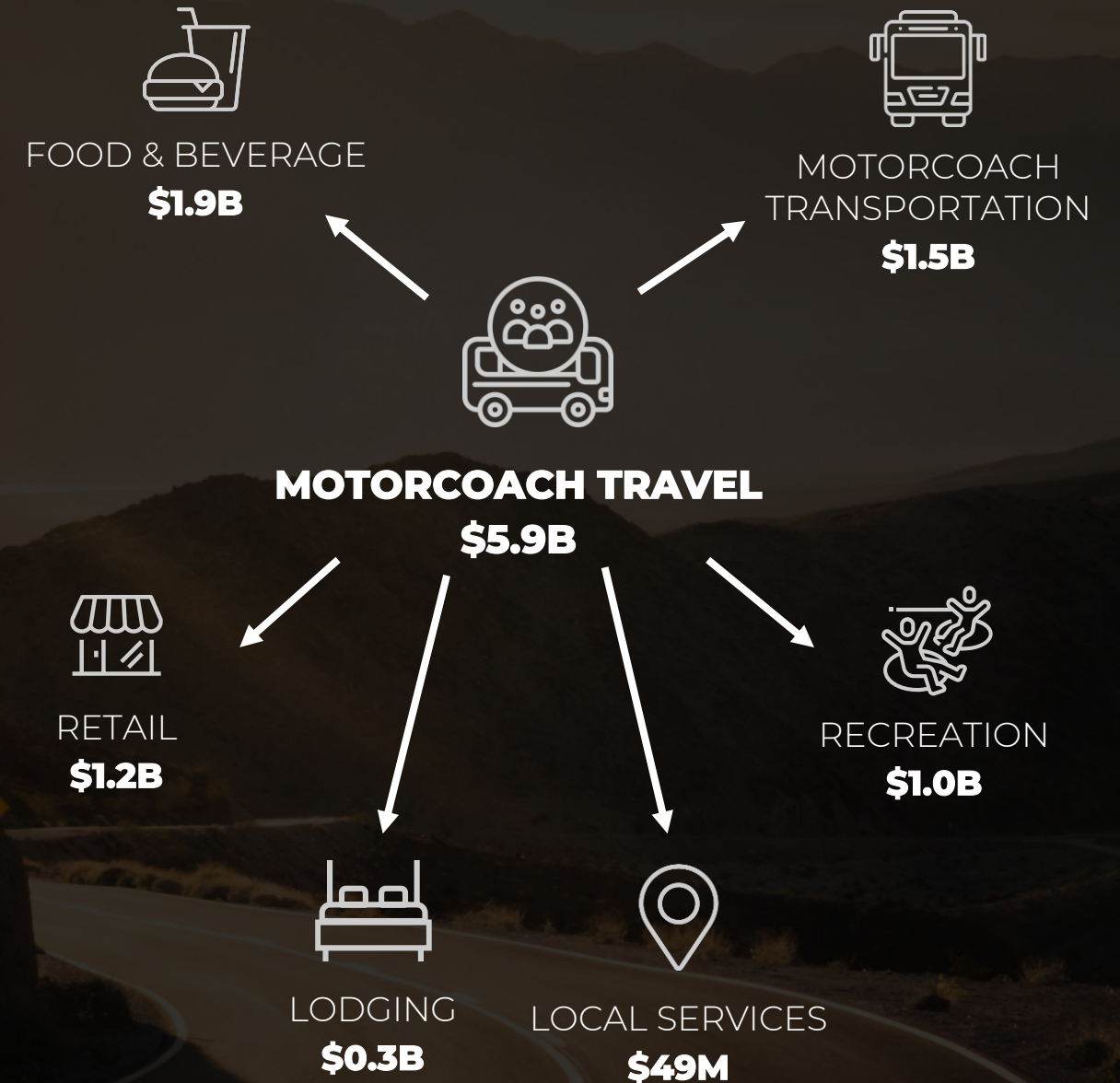


## Total Economic Impact

The sector's direct spending impact of \$5.9 billion generated a total economic impact of \$12.7 billion in the New York economy, which supported 59,189 part-time and full-time jobs and generated \$2.5 billion in taxes.



## MOTORCOACH TRAVEL DIRECT ECONOMIC FOOTPRINT ON NEW YORK



Source: Tourism Economics  
Note: totals may not sum due to rounding.

# Summary Impacts

## Direct Impacts

Motorcoach travel produced nearly \$5.9 billion in business sales, generated more than \$2.0 billion in wages and salaries, and supported over 34,200 jobs, contributing to almost \$1.4 billion in taxes.

## Total Impacts

When considering the total impact, including indirect and induced effects, business sales surged above \$12.7 billion, wages and salaries neared \$4.4 billion, and job creation approached 59,200. Total tax revenue tallied more than \$2.5 billion, demonstrating a significantly broader economic footprint.

## Summary Impacts (2024)

\$ millions, jobs

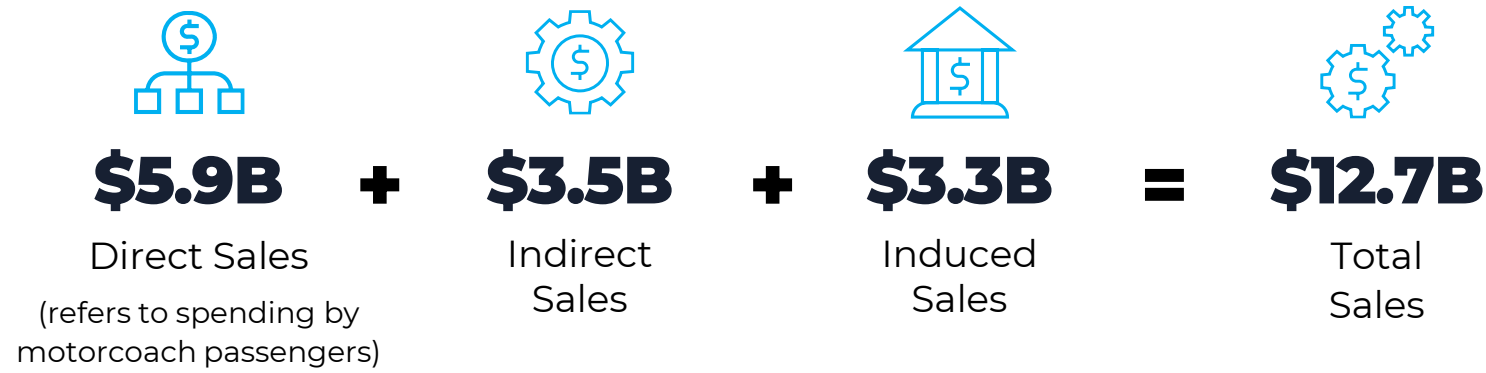
	Direct Impacts	Total Impacts
Business Sales	\$5,895	\$12,705
Wages and Salaries	\$2,035	\$4,377
Jobs	34,266	59,189
Total Taxes	\$1,397	\$2,518
State and Local	\$910	\$1,466
Federal	\$487	\$1,051

Source: Tourism Economics



# Business Sales Impacts

Motorcoach travel contributed a direct impact of \$5.9 billion in 2024. This direct impact generated \$6.8 billion in indirect and induced impacts, resulting in a total economic impact of \$12.7 billion in the New York economy.



## Business Sales Impacts by Industry (2024)

\$ millions

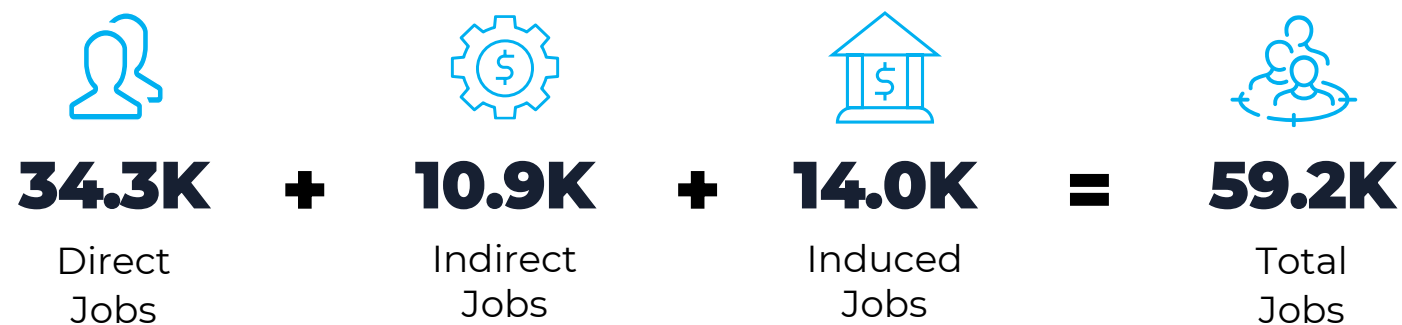
	Direct Business Sales	Indirect Business Sales	Induced Business Sales	Total Business Sales
<b>Total</b>	<b>\$5,895</b>	<b>\$3,495</b>	<b>\$3,315</b>	<b>\$12,705</b>
Finance, Insurance, and Real Estate		\$1,400	\$1,053	\$2,454
Food and Beverage	\$1,919	\$46	\$199	\$2,164
Transportation	\$1,508	\$137	\$114	\$1,759
Retail Trade	\$1,179	\$22	\$247	\$1,448
Recreation and Entertainment	\$954	\$149	\$63	\$1,166
Business Services		\$764	\$298	\$1,062
Education and Health Care		\$12	\$646	\$657
Personal Services		\$367	\$146	\$513
Communications		\$209	\$202	\$411
Wholesale Trade		\$193	\$161	\$355
Lodging	\$334	\$2	\$8	\$343
Construction and Utilities		\$103	\$80	\$183
Manufacturing		\$66	\$55	\$121
Government		\$20	\$35	\$54
Agriculture, Fishing, Mining		\$7	\$7	\$13

Source: Tourism Economics

The total economic impact of **\$12.7 billion** accrued to industries across the economy.

# Employment Impacts

Motorcoach travel sustained 34,266 direct jobs in 2024, with an additional 24,923 jobs supported from the indirect and induced impacts of motorcoach travel activity. The total employment impact reached 59,189 jobs, equivalent to 0.45% of total employment. Motorcoach travel spending supported the largest number of jobs in the food and beverage industry (16,707).



## Employment Impacts by Industry (2024)

Jobs

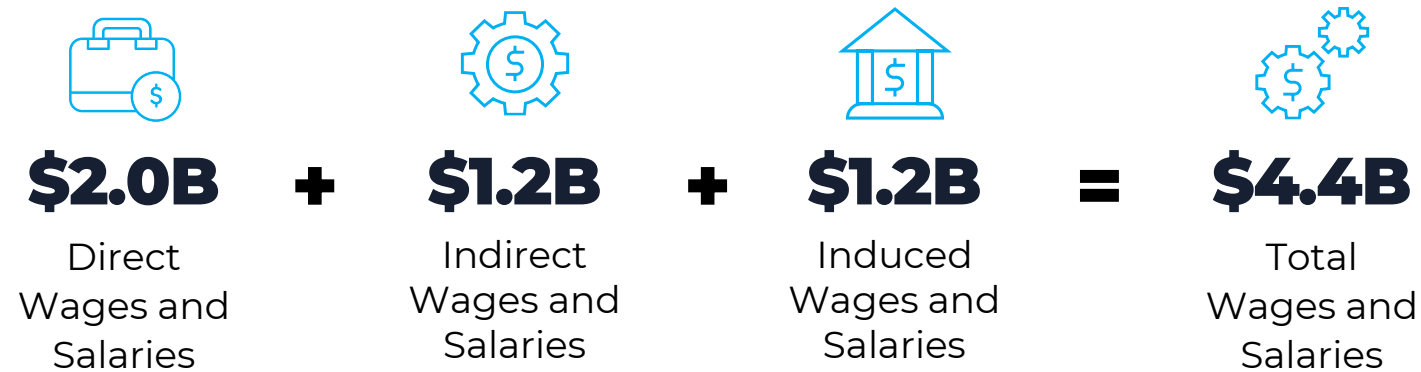
	Direct Jobs	Indirect Jobs	Induced Jobs	Total Jobs
<b>Total</b>	<b>34,266</b>	<b>10,916</b>	<b>14,007</b>	<b>59,189</b>
Food and Beverage	14,772	388	1,547	16,707
Retail Trade	9,259	150	1,681	11,089
Recreation and Entertainment	5,677	727	415	6,819
Transportation	2,980	900	724	4,604
Finance, Insurance, and Real Estate		2,804	1,670	4,474
Education and Health Care		99	4,273	4,372
Business Services		2,977	1,265	4,242
Personal Services		1,841	1,360	3,200
Lodging	1,578	7	34	1,619
Wholesale Trade		392	342	734
Communications		230	267	497
Construction and Utilities		136	147	283
Manufacturing		139	103	243
Government		80	130	210
Agriculture, Fishing, Mining		48	50	98

Source: Tourism Economics

The motorcoach travel economy supports **1 in 223 of all jobs** in New York, including over **16,700 jobs** in the food and beverage industry.

# Wages and Salaries Impacts

Motorcoach travel generated \$2.0 billion in direct wages and salaries and a total of \$4.4 billion, including indirect and induced impacts.



## Wage and Salary Impacts by Industry (2024)

\$ millions

	Direct Wages & Salaries	Indirect Wages & Salaries	Induced Wages & Salaries	Total Wages & Salaries
<b>Total</b>	<b>\$2,035</b>	<b>\$1,163</b>	<b>\$1,179</b>	<b>\$4,377</b>
Food and Beverage	\$632	\$19	\$68	\$719
Retail Trade	\$530	\$9	\$98	\$637
Business Services		\$410	\$155	\$566
Recreation and Entertainment	\$454	\$78	\$30	\$562
Finance, Insurance, and Real Estate		\$309	\$173	\$482
Education and Health Care		\$6	\$375	\$382
Transportation	\$277	\$46	\$43	\$367
Personal Services		\$129	\$86	\$215
Lodging	\$141	\$1	\$3	\$145
Communications		\$58	\$52	\$110
Wholesale Trade		\$48	\$44	\$91
Construction and Utilities		\$23	\$20	\$43
Government		\$11	\$19	\$30
Manufacturing		\$13	\$9	\$22
Agriculture, Fishing, Mining		\$3	\$3	\$6

Source: Tourism Economics



Motorcoach travel spending drives income across industries, including **eight industries with more than \$200 million** in total wages and salaries.

# Tax Impacts

Motorcoach traveler spending, visitor-supported jobs, and business sales generated over \$2.5 billion in total government revenues. State and local taxes alone tallied nearly \$1.5 billion in 2024.

Each household in New York would need to be taxed an additional \$322 to replace the motorcoach travel-generated taxes received by state and local governments in 2024.

## Tax Impacts (2024)

\$ millions

	2024
<b>Total Tax Revenue</b>	<b>\$2,518</b>
<b>Federal</b>	<b>\$1,051</b>
Personal income	\$465
Corporate	\$119
Indirect business	\$32
Social insurance	\$435
<b>State and Local</b>	<b>\$1,466</b>
Sales	\$648
Bed tax	\$48
Personal income	\$186
Corporate	\$140
Social insurance	\$8
Excise and fees	\$53
Property	\$383

Source: Tourism Economics

Note: totals may not sum due to rounding.



# Geographical Distribution of Motorcoach Operations

## Motorcoach Operations in the State of New York

To provide a comprehensive understanding of the motorcoach industry's footprint within the State of New York, this section identifies where direct group travel spending primarily takes place, highlighting key operational hubs and areas with higher concentrations of service providers.

Specifically, the top three congressional districts with the highest concentration of operations are:

- New York's Twelfth Congressional District
- New York's Fifth Congressional District
- New York's Tenth Congressional District

Understanding these locations offers valuable insights into the industry's infrastructure, facilitating strategic planning for both operators and stakeholders interested in the state's motorcoach sector.

## Fuel Usage

The analysis reveals that the motorcoach industry, supporting group travel across New York, collectively consumed an estimated 25 million gallons of fuel in 2024. This figure accounts for the operational demands of the 1,876 motorcoaches in service in New York, reflecting the miles traveled to facilitate charter, packaged tours, and sightseeing excursions.





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# Group Travel Economic Impacts

# Key Findings

## Direct Spending Impacts

On behalf of the American Bus Association, Tourism Economics conducted a detailed economic impact analysis that quantifies the important role of motorcoach group travel. Motorcoach group travel represents people traveling aboard motorcoaches as organized groups, including charter, group tour and sightseeing activities, and the associated spending. It excludes scheduled service and commuter travel.

Motorcoach group travel in the State of New York recorded an estimated 1.2 billion passenger miles in 2024, supporting significant economic impacts nationally. Direct spending by motorcoach group travelers amounted to \$3.4 billion in 2024, including spending on motorcoach transportation as well as a range of goods and services, such as accommodations and food and beverages.



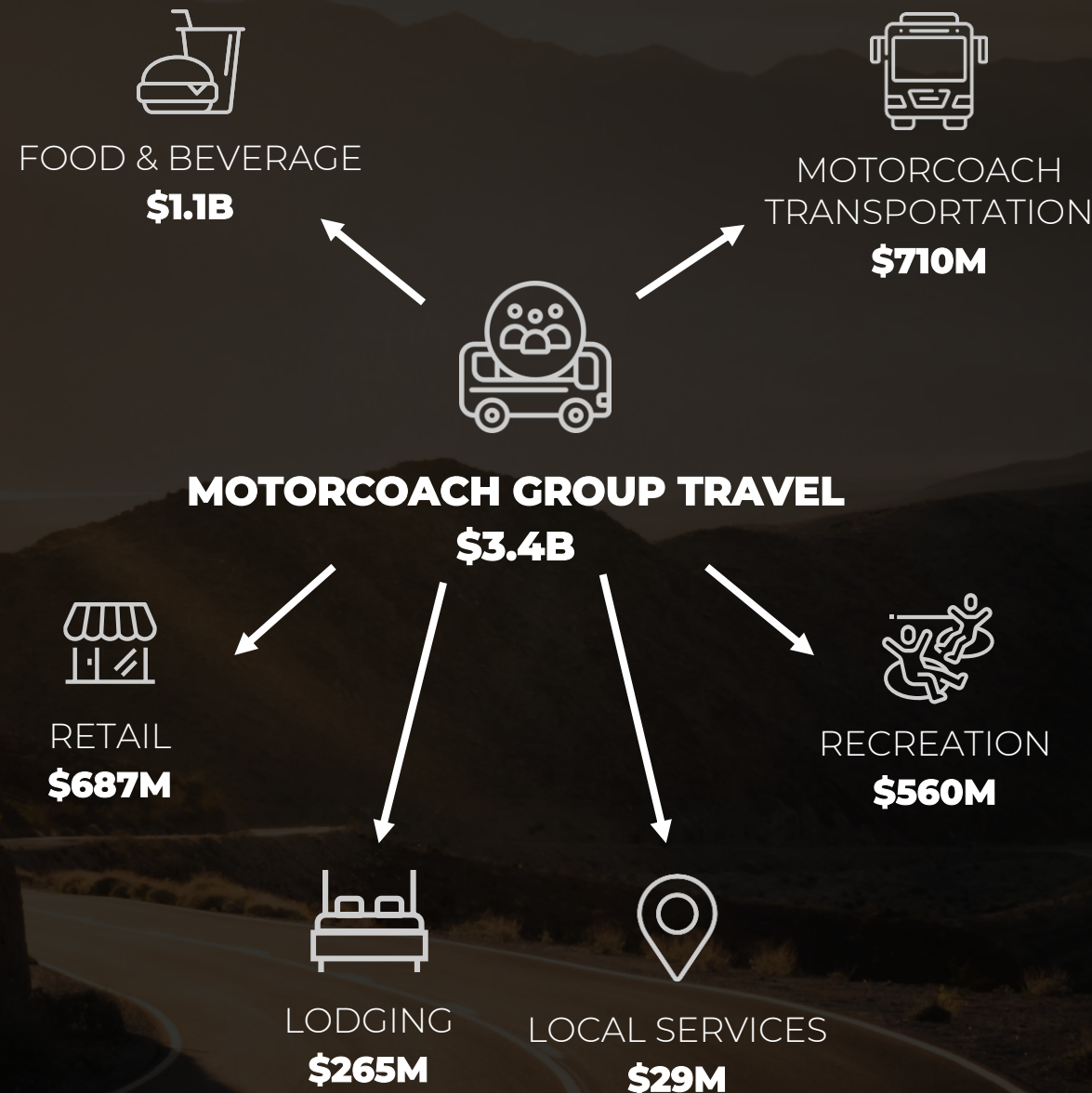
## Total Economic Impact

The sector's direct spending impact of \$3.4 billion generated a total economic impact of \$7.2 billion in the New York economy, which supported 34,486 part-time and full-time jobs and generated \$1.4 billion in taxes.



# MOTORCOACH GROUP TRAVEL

## DIRECT ECONOMIC FOOTPRINT ON NEW YORK



Source: Tourism Economics

Note: totals may not sum due to rounding.

# Summary Impacts

## Direct Impacts

Motorcoach group travel generated nearly \$3.4 billion in business sales, approached \$1.2 billion in wages and salaries, and supported almost 20,100 jobs, contributing to \$818 million in taxes.

## Total Impacts

When considering the total impact, including indirect and induced effects, business sales surged to more than \$7.2 billion, wages and salaries exceeded \$2.5 billion, and job creation neared 34,500 jobs. Total tax revenue topped \$1.4 billion, demonstrating a significantly broader economic footprint.

## Summary Impacts (2024)

\$ millions, jobs

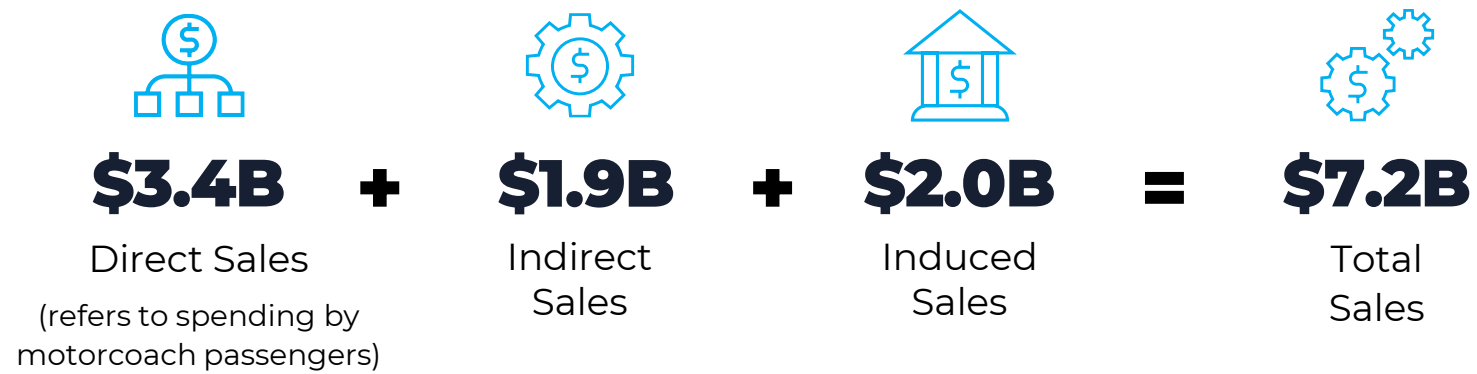
	Direct Impacts	Total Impacts
Business Sales	\$3,372	\$7,245
Wages and Salaries	\$1,197	\$2,539
Jobs	20,061	34,486
Total Taxes	\$818	\$1,446
State and Local	\$532	\$835
Federal	\$286	\$611

Source: Tourism Economics



# Business Sales Impacts

Motorcoach group travel contributed a direct impact of \$3.4 billion in 2024. This direct impact generated nearly \$3.9 billion in indirect and induced impacts, resulting in a total economic impact of \$7.2 billion in the New York economy.



## Business Sales Impacts by Industry (2024)

\$ millions

	Direct Business Sales	Indirect Business Sales	Induced Business Sales	Total Business Sales
<b>Total</b>	<b>\$3,372</b>	<b>\$1,880</b>	<b>\$1,993</b>	<b>\$7,245</b>
Finance, Insurance, and Real Estate		\$700	\$634	\$1,334
Food and Beverage	\$1,120	\$30	\$120	\$1,271
Transportation	\$740	\$71	\$69	\$880
Retail Trade	\$687	\$14	\$148	\$850
Recreation and Entertainment	\$560	\$94	\$38	\$691
Business Services		\$438	\$179	\$617
Education and Health Care		\$7	\$388	\$395
Lodging	\$265	\$1	\$5	\$271
Communications		\$133	\$122	\$255
Personal Services		\$163	\$88	\$251
Wholesale Trade		\$104	\$97	\$201
Construction and Utilities		\$66	\$48	\$115
Manufacturing		\$42	\$33	\$75
Government		\$13	\$21	\$33
Agriculture, Fishing, Mining		\$4	\$4	\$8

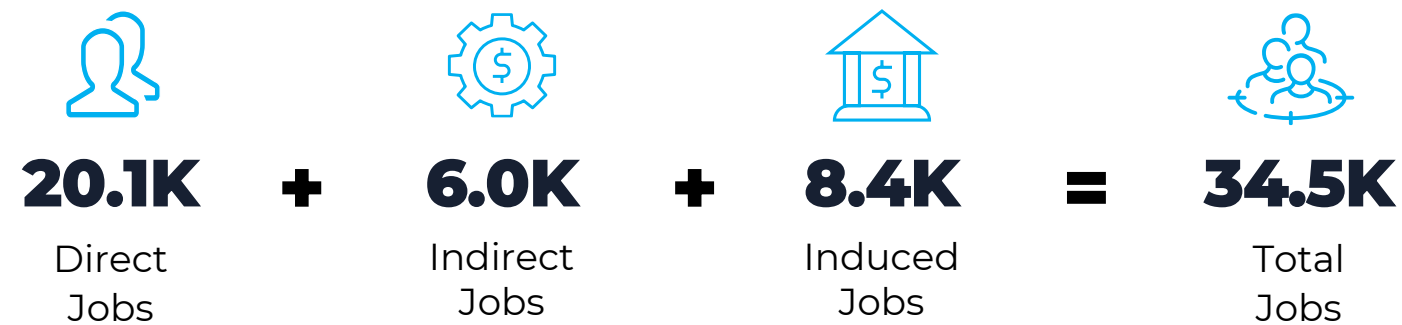
Source: Tourism Economics

Note: totals may not sum due to rounding.

The total economic impact of **\$7.2 billion** accrued to industries across the economy.

# Employment Impacts

Motorcoach group travel sustained 20,061 direct jobs in 2024, with an additional 14,425 jobs supported from the indirect and induced impacts of group travel activity. The total employment impact reached 34,486 jobs, equivalent to 0.26% of employment in New York. Motorcoach group travel spending supported the largest number of jobs in the food and beverage industry (9,801).



## Employment Impacts by Industry (2024)

Jobs

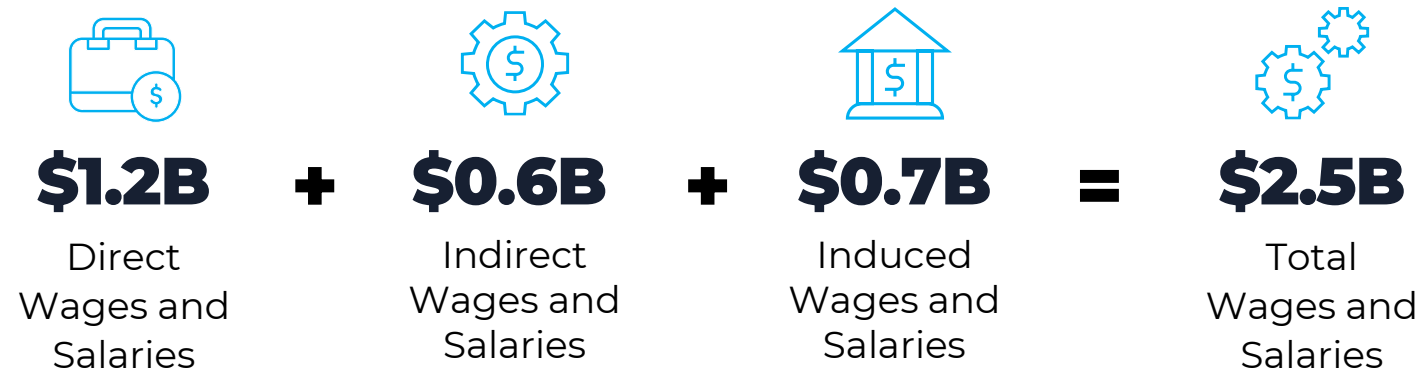
	Direct Jobs	Indirect Jobs	Induced Jobs	Total Jobs
<b>Total</b>	<b>20,061</b>	<b>6,005</b>	<b>8,420</b>	<b>34,486</b>
Food and Beverage	8,615	257	930	9,801
Retail Trade	5,388	94	1,010	6,492
Recreation and Entertainment	3,324	450	249	4,024
Education and Health Care		61	2,568	2,630
Finance, Insurance, and Real Estate		1,482	1,004	2,486
Business Services		1,722	760	2,483
Transportation	1,483	491	435	2,409
Personal Services		825	817	1,642
Lodging	1,251	4	21	1,276
Wholesale Trade		220	206	425
Communications		144	160	305
Construction and Utilities		88	88	176
Manufacturing		87	62	149
Government		50	78	129
Agriculture, Fishing, Mining		30	30	60

Source: Tourism Economics

The motorcoach group travel economy supports **1 in 382 of all jobs** in the State of New York, including **9,801 jobs** in the food and beverage industry.

# Wages and Salaries Impacts

Motorcoach group travel generated \$1.2 billion in direct wages and salaries and a total of \$2.5 billion, including indirect and induced impacts.



## Wage and Salary Impacts by Industry (2024)

\$ millions

	Direct Wages & Salaries	Indirect Wages & Salaries	Induced Wages & Salaries	Total Wages & Salaries
<b>Total</b>	<b>\$1,197</b>	<b>\$633</b>	<b>\$709</b>	<b>\$2,539</b>
Food and Beverage	\$369	\$13	\$41	\$422
Retail Trade	\$309	\$5	\$59	\$373
Recreation and Entertainment	\$266	\$49	\$18	\$333
Business Services		\$234	\$93	\$327
Finance, Insurance, and Real Estate		\$148	\$104	\$252
Education and Health Care		\$4	\$226	\$230
Transportation	\$141	\$26	\$26	\$193
Lodging	\$112	\$0	\$2	\$114
Personal Services		\$60	\$52	\$111
Communications		\$37	\$31	\$68
Wholesale Trade		\$27	\$26	\$53
Construction and Utilities		\$15	\$12	\$27
Government		\$7	\$11	\$18
Manufacturing		\$8	\$6	\$14
Agriculture, Fishing, Mining		\$2	\$2	\$4

Source: Tourism Economics



Motorcoach group travel spending drives income across industries, including **nine industries with more than \$100 million** in total wages and salaries.

# Tax Impacts

Motorcoach group traveler spending, visitor-supported jobs, and business sales generated more than \$1.4 billion in total government revenues. State and local taxes alone tallied \$835 million in 2024.

Each household in the State of New York would need to be taxed an additional \$185 to replace the motorcoach group travel-generated taxes received by state and local governments in 2024.

## Tax Impacts (2024)

\$ millions

	2024
<b>Total Tax Revenue</b>	<b>\$1,446</b>
<b>Federal</b>	<b>\$611</b>
Personal income	\$271
Corporate	\$67
Indirect business	\$18
Social insurance	\$255
<b>State and Local</b>	<b>\$835</b>
Sales	\$350
Bed tax	\$39
Personal income	\$108
Corporate	\$77
Social insurance	\$4
Excise and fees	\$31
Property	\$227

Source: Tourism Economics

Note: totals may not sum due to rounding.



A blue bus is driving on a road, with a car visible in the distance. The bus is the central focus of the image, and the text is overlaid on it.

# Scheduled Service Economics Impacts

# Key Findings

## Direct Spending Impacts

On behalf of the American Bus Association, Tourism Economics conducted a detailed economic impact analysis that quantifies the important role of motorcoach scheduled service. Motorcoach scheduled service represents people traveling along fixed routes with predetermined stops and timetables, such as intercity and airport transportation. This excludes private charter, group tour, or sightseeing activities.

Motorcoach scheduled service in New York recorded an estimated 1.9 billion passenger miles in the U.S. in 2024, supporting significant economic impacts nationally. Direct spending by motorcoach scheduled service travelers amounted to \$2.5 billion in 2024, including spending on motorcoach transportation as well as a range of goods and services, such as accommodations and food and beverages.



## Total Economic Impact

The sector's direct spending impact of \$2.5 billion generated a total economic impact of \$5.5 billion in the New York economy, which supported 24,704 part-time and full-time jobs and generated \$1.1 billion in taxes.

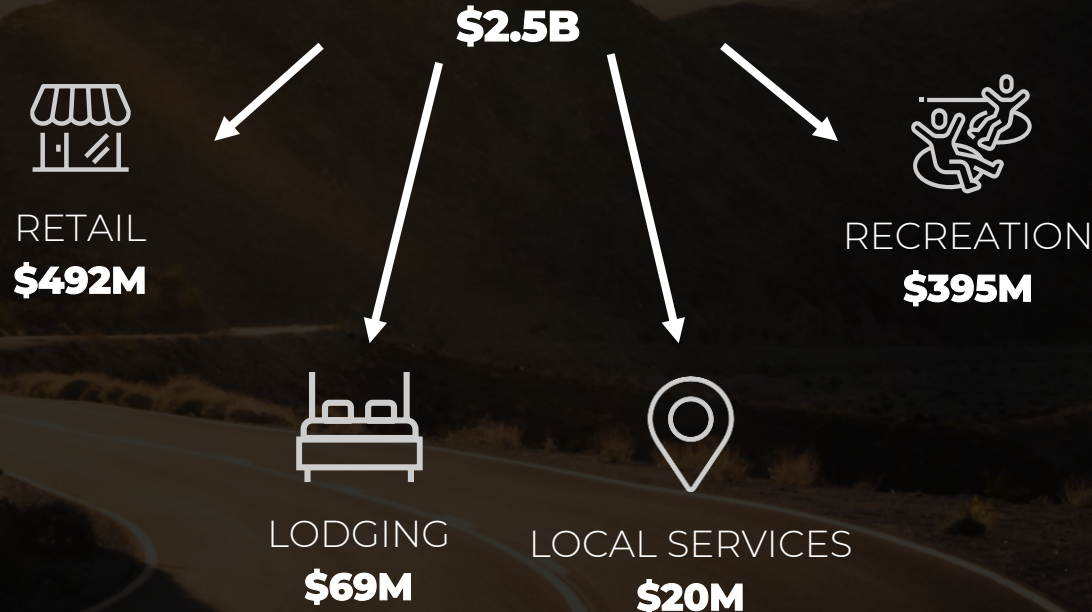


# MOTORCOACH SCHEDULED SERVICE

## DIRECT ECONOMIC FOOTPRINT ON NEW YORK



## MOTORCOACH SCHEDULED SERVICE



Source: Tourism Economics  
Note: totals may not sum due to rounding.

# Summary Impacts

## Direct Impacts

Motorcoach scheduled service generated more than \$2.5 billion in business sales, \$838 million in wages and salaries, and supported over 14,200 jobs, contributing to \$578 million in taxes.

## Total Impacts

When considering the total impact, including indirect and induced effects, business sales surged to nearly \$5.5 billion, wages and salaries exceeded \$1.8 billion, and job creation topped 24,700. Total tax revenue amounted to almost \$1.1 billion, demonstrating a significantly broader economic footprint.

## Summary Impacts (2024)

\$ millions, jobs

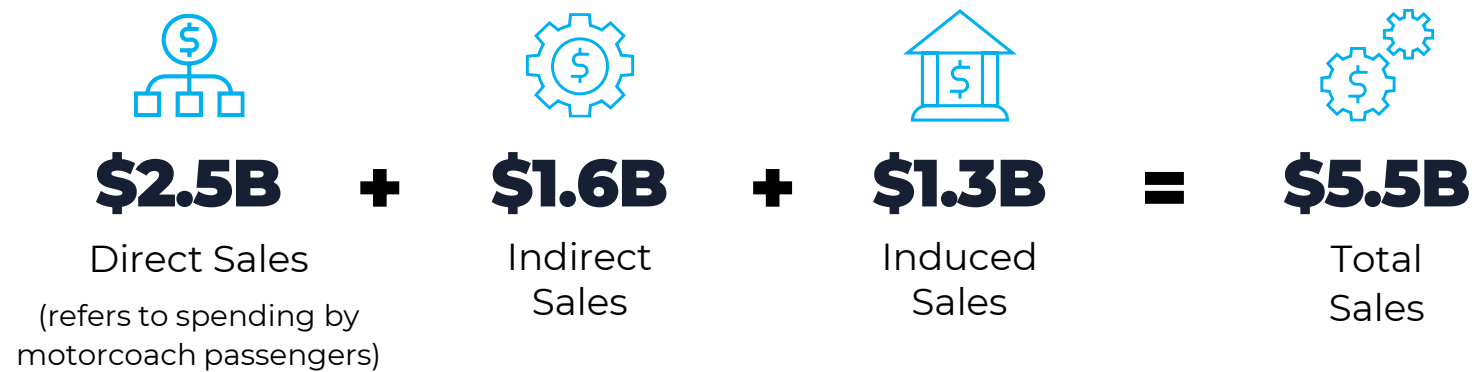
	Direct Impacts	Total Impacts
Business Sales	\$2,523	\$5,460
Wages and Salaries	\$838	\$1,838
Jobs	14,205	24,704
Total Taxes	\$578	\$1,072
State and Local	\$378	\$631
Federal	\$201	\$441

Source: Tourism Economics



# Business Sales Impacts

Motorcoach scheduled service contributed a direct impact of more than \$2.5 billion in 2024. This direct impact generated over \$2.9 billion in indirect and induced impacts, resulting in a total economic impact of nearly \$5.5 billion in the U.S. economy.



## Business Sales Impacts by Industry (2024)

\$ millions

	Direct Business Sales	Indirect Business Sales	Induced Business Sales	Total Business Sales
<b>Total</b>	<b>\$2,523</b>	<b>\$1,615</b>	<b>\$1,322</b>	<b>\$5,460</b>
Finance, Insurance, and Real Estate		\$700	\$420	\$1,120
Food and Beverage	\$798	\$15	\$79	\$893
Transportation	\$768	\$66	\$46	\$880
Retail Trade	\$492	\$8	\$99	\$599
Recreation and Entertainment	\$395	\$56	\$25	\$475
Business Services		\$326	\$119	\$445
Personal Services		\$204	\$58	\$263
Education and Health Care		\$4	\$257	\$262
Communications		\$76	\$81	\$156
Wholesale Trade		\$90	\$64	\$154
Lodging	\$69	\$1	\$3	\$73
Construction and Utilities		\$36	\$32	\$68
Manufacturing		\$24	\$22	\$46
Government		\$7	\$14	\$21
Agriculture, Fishing, Mining		\$2	\$3	\$5

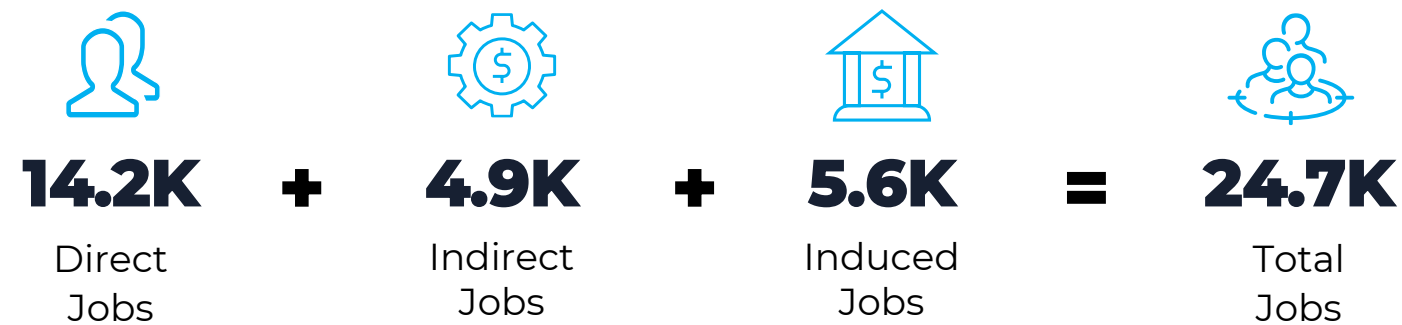
Source: Tourism Economics

Note: totals may not sum due to rounding.

The total economic impact of **\$5.5 billion** accrued to industries across the economy.

# Employment Impacts

Motorcoach scheduled service sustained 14,205 direct jobs in 2024, with an additional 10,498 jobs supported from the indirect and induced impacts of scheduled travel activity. The total employment impact reached 24,704 jobs, equivalent to 0.19% of total employment. Motorcoach scheduled service spending supported the largest number of jobs in the food and beverage industry (6,906).



## Employment Impacts by Industry (2024)

Jobs

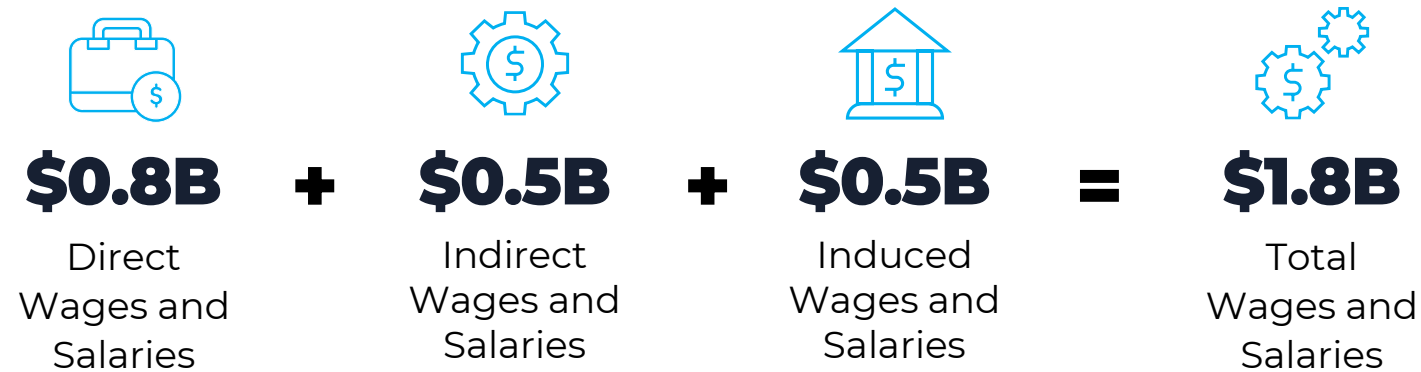
	Direct Jobs	Indirect Jobs	Induced Jobs	Total Jobs
<b>Total</b>	<b>14,205</b>	<b>4,911</b>	<b>5,587</b>	<b>24,704</b>
Food and Beverage	6,158	131	617	6,906
Retail Trade	3,871	55	670	4,596
Recreation and Entertainment	2,352	277	165	2,795
Transportation	1,498	409	289	2,195
Finance, Insurance, and Real Estate		1,322	666	1,988
Business Services		1,255	505	1,759
Education and Health Care		38	1,704	1,742
Personal Services		1,016	542	1,558
Lodging	327	3	14	344
Wholesale Trade		173	136	309
Communications		85	107	192
Construction and Utilities		48	59	106
Manufacturing		52	41	93
Government		30	52	82
Agriculture, Fishing, Mining		18	20	38

Source: Tourism Economics

The motorcoach scheduled service economy supports **1 in 533 of all jobs** in New York, including over **6,900 jobs** in the food and beverage industry.

# Wages and Salaries Impacts

Motorcoach scheduled service generated \$838 million in direct wages and salaries and a total of more than \$1.8 billion, including indirect and induced impacts.



## Wage and Salary Impacts by Industry (2024)

\$ millions

	Direct Wages & Salaries	Indirect Wages & Salaries	Induced Wages & Salaries	Total Wages & Salaries
<b>Total</b>	<b>\$838</b>	<b>\$530</b>	<b>\$470</b>	<b>\$1,838</b>
Food and Beverage	\$263	\$6	\$27	\$297
Retail Trade	\$221	\$3	\$39	\$264
Business Services		\$176	\$62	\$238
Finance, Insurance, and Real Estate		\$161	\$69	\$230
Recreation and Entertainment	\$188	\$29	\$12	\$229
Transportation	\$136	\$21	\$17	\$174
Education and Health Care		\$2	\$150	\$152
Personal Services		\$69	\$34	\$104
Communications		\$21	\$21	\$42
Wholesale Trade		\$21	\$17	\$38
Lodging	\$29	\$0	\$1	\$31
Construction and Utilities		\$8	\$8	\$16
Government		\$4	\$7	\$12
Manufacturing		\$5	\$4	\$8
Agriculture, Fishing, Mining		\$1	\$1	\$3

Source: Tourism Economics



Motorcoach scheduled service spending drives income across industries, including **eight industries with more than \$100 million** in total wages and salaries.

# Tax Impacts

Motorcoach scheduled service spending, visitor-supported jobs, and business sales generated nearly \$1.1 billion in total government revenues. State and local taxes alone tallied \$631 million in 2024.

Each household in New York would need to be taxed an additional \$137 to replace the motorcoach scheduled service-generated taxes received by state and local governments in 2024.

## Tax Impacts (2024)

\$ millions

	2024
<b>Total Tax Revenue</b>	<b>\$1,072</b>
<b>Federal</b>	<b>\$441</b>
Personal income	\$194
Corporate	\$52
Indirect business	\$14
Social insurance	\$180
<b>State and Local</b>	<b>\$631</b>
Sales	\$299
Bed tax	\$9
Personal income	\$78
Corporate	\$64
Social insurance	\$3
Excise and fees	\$22
Property	\$157

Source: Tourism Economics

Note: totals may not sum due to rounding.



# APPENDIX



# Economic Impact Methodology

Our analysis of the motorcoach travel impact begins with direct passenger spending and operator spending/expenditures and analyzes the downstream effects of this spending on the broader economy. To determine total economic impact, we input direct spending into a model of the state economy, constructed using an IMPLAN input-output (I-O) model. The model traces the full extent of industry impacts as dollars flow through the local economy. The state results are part of broader national research.

The study defines motorcoach group travel as the activity of transporting motorcoach charter, sightseeing, and packaged tour passengers, and the additional spending by these passengers during their trip, such as on accommodations, food and beverages, and entertainment. Motorcoach scheduled service, by contrast, refers to regularly scheduled intercity or commuter routes that operate on fixed timetables and serve passengers traveling between cities or regions. This study measures the motorcoach and other jobs in the economy supported by passenger spending, as well as wages and salaries, taxes, and total business sales.

I-O models represent a profile of an economy by measuring the relationships among industries and consumers, quantifying three levels of impact:

- 1. Direct impacts:** Motorcoach group traveler spending creates direct economic value within a discrete group of sectors (such as recreation and transportation). This supports a relative proportion of spending, jobs, wages, and taxes within each sector.
- 2. Indirect impacts:** Each directly affected sector also purchases goods and services as inputs (e.g., food wholesalers, utilities) into production. These impacts are called indirect impacts or supply-chain effects.
- 3. Induced impacts:** Lastly, the induced impact is generated when employees whose wages are generated either directly or indirectly by visitor spending spend those wages in the local economy. This is called the induced impact or income effect.

The Tourism Economics model calculates these three levels of impact—direct, indirect, and induced—for a broad set of indicators, including:

- Spending
- Wages and Salaries
- Employment
- Federal Taxes
- State Taxes
- Local Taxes

# Economic Impact Framework



# Glossary of Terms

## Glossary – Spending Definitions

Term	Description
<i>Motorcoach group transportation</i>	<i>Includes people traveling aboard motorcoaches as organized groups, including charter, group tour and sightseeing activities, and the associated spending. It excludes scheduled service and commuter travel.</i>
<i>Motorcoach scheduled transportation</i>	<i>Includes people traveling aboard regularly scheduled intercity or commuter motorcoach services that run on fixed routes and timetables, and the associated spending.</i>
<i>Lodging</i>	<i>All accommodation businesses, including hotels, B&amp;Bs, campgrounds, and short-term rentals. This includes food, entertainment, and other services provided by these establishments.</i>
<i>Food and beverage</i>	<i>Includes all visitor spending on food &amp; beverages, including at restaurants, bars, grocery stores and other food providers.</i>
<i>Recreation</i>	<i>Includes visitors spending within the arts, entertainment and recreation sector.</i>
<i>Retail</i>	<i>Includes visitor spending in all retail sub-sectors within the local economy, excluding grocery stores.</i>
<i>Local transport</i>	<i>Ride share, taxis, limos, trains, rental cars, buses, and gasoline purchases.</i>

## Glossary – Economic Impact Definitions

Term	Description
<i>Direct Impact</i>	<i>Impacts (business sales, jobs, income, and taxes) related to businesses where motorcoach group travelers spend dollars (e.g., recreation, transportation, lodging).</i>
<i>Indirect Impact</i>	<i>Impacts created from the purchase of goods and services as inputs (e.g., food wholesalers, utilities, business services) into production by the directly affected sectors (i.e., business-to-business purchases).</i>
<i>Induced Impact</i>	<i>Impacts created from spending in the local economy by employees whose wages are generated either directly or indirectly by motorcoach group traveler activity.</i>
<i>Total Impact</i>	
<i>Employment</i>	<i>Employment is measured by the Bureau of Economic Analysis (BEA) definition, and captures full-time and part-time jobs, which includes salary and wage employees and proprietors.</i>
<i>Wages and Salaries</i>	<i>Labor income (wages, salaries, proprietor income and benefits) supported by visitor spending.</i>
<i>Local Taxes</i>	<i>City and county taxes generated by visitor spending. Includes any local sales, income, bed, usage fees, licenses and other revenue streams to local governmental authorities.</i>
<i>State Taxes</i>	<i>State tax revenues generated by visitor spending. Includes sales, income, corporate, usage fees and other assessments of state governments.</i>

## About the Research Team

This extensive research, undertaken to provide a thorough understanding of the motorcoach industry's economic footprint, was commissioned by the American Bus Association Foundation and carried out by Tourism Economics, a division of Oxford Economics.

Oxford Economics was founded in 1981 as a commercial venture with Oxford University's business college to provide economic forecasting and modelling to UK companies and financial institutions expanding abroad. Since then, we have become one of the world's foremost independent global advisory firms, providing reports, forecasts and analytical tools on 200 countries, 100 industrial sectors and over 3,000 cities. Our best-of-class global economic and industry models and analytical tools give us an unparalleled ability to forecast external market trends and assess their economic, social and business impact.

Oxford Economics is an adviser to corporate, financial and government decision-makers and thought leaders. Our worldwide client base comprises over 2,000 international organizations, including leading multinational companies and financial institutions; key government bodies and trade associations; and top universities, consultancies, and think tanks.

This study was conducted by the Tourism Economics group within Oxford Economics. Tourism Economics combines an understanding of traveler dynamics with rigorous economics in order to answer the most important questions facing destinations, investors, and strategic planners. By combining quantitative methods with industry knowledge, Tourism Economics designs custom market strategies, destination recovery plans, forecasting models, policy analysis, and economic impact studies.

Oxford Economics employs more than 600 full-time staff, including 350+ professional economists and analysts. Headquartered in Oxford, England, with regional centers in London, New York, and Singapore, Oxford Economics has offices across the globe in Belfast, Chicago, Dubai, Miami, Milan, Paris, Philadelphia, San Francisco, and Washington DC.



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For more information, questions on the report or other general inquiries, please reach out to the team at [admin@tourismeconomics.com](mailto:admin@tourismeconomics.com).