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# Public Transport: United States

September 2018



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# About This Report

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## Scope

This report forecasts to 2022 US public transport revenues in nominal US dollars. Total revenues are segmented by type in terms of:

- scheduled and chartered air
- taxicab and limousine, including ridesharing services or transportation network companies (TNCs)
- cruise and ferry
- sightseeing and charter bus
- mass transit, including commuter bus, commuter rail, light rail, mixed-mode, monorail, subway, and tramway (also referred to as trolley or streetcar)
- intercity rail (e.g., Amtrak)
- intercity and rural bus
- other passenger transport services such as employee, paratransit, school, senior, and shuttle

To illustrate historical trends, total revenues, the various segments, the number of firms and establishments, and employment are provided in annual series from 2007 to 2017.

The scope of this report includes the revenues of employer and nonemployer establishments. Revenues represent the transportation of passengers and their belongings; freight is excluded. Rental of light vehicles, bikes, or scooters is excluded from the scope of this report.

This report includes the results of a proprietary national online consumer survey of US adults (age 18+). This Freedonia Focus Reports National Survey has a sample size of approximately 2,000, screened for response quality, and representative of the US population on the demographic measures of age, gender, geographic region, race/ethnicity, household income, and the presence/absence of children in the household.

Key macroeconomic indicators are also provided with quantified trends. Other various topics, including profiles of pertinent leading suppliers, are covered in this report. A full outline of report items by page is available in the Table of Contents.

## Sources

*Public Transport: United States* (FF95059) represents the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources including:

- firms participating in the industry, and their suppliers and customers

## About This Report

- government/public agencies
- national, regional, and international non-governmental organizations
- trade associations and their publications
- the business and trade press
- indicator forecasts by The Freedonia Group
- the findings of other reports and studies by The Freedonia Group

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

## Industry Codes

Table 9 | NAICS & SIC Codes Related to Public Transport

| NAICS/SCIAN 2007                              |  | SIC                                |   |
|---|--|------------------------------------|---|
| North American Industry Classification System |  | Standard Industrial Classification |   |
| 481111  | Scheduled Passenger Air Transport                | 4011                               | Railroads, Line-Haul Operating                    |
| 481211  | Nonscheduled Chartered Passenger Air Transport   | 4111                               | Local and Suburban Transit                        |
| 482111  | Line-Haul Railroads                              | 4119                               | Local Passenger Transport, NEC                    |
| 483112  | Deep Sea Passenger Transport                     | 4121                               | Taxicabs  |
| 483114  | Coastal and Great Lakes Passenger Transport      | 4131                               | Intercity and Rural Bus Transport                 |
| 483212  | Inland Water Passenger Transport                 | 4141                               | Local Bus Charter Service                         |
| 485111  | Mixed Mode Transit Systems                       | 4142                               | Bus Charter Service, Except Local                 |
| 485112  | Commuter Rail Systems                            | 4151                               | School Buses                                      |
| 485113  | Bus and Other Motor Vehicle Transit Systems      | 4481                               | Deep Sea Transport of Passengers, Except by Ferry |
| 485119  | Other Urban Transit Systems                      | 4482                               | Ferries   |
| 485210  | Interurban and Rural Bus Transport               | 4489                               | Water Transport of Passengers, NEC                |
| 485310  | Taxi Service                                     | 4789                               | Transport Services, NEC                           |
| 485320  | Limousine Service                                | 4512                               | Air Transport, Scheduled                          |
| 485410  | School and Employee Bus Transport                | 4522                               | Air Transport, Nonscheduled                       |
| 485510  | Charter Bus Industry                             | 7999                               | Amusement and Recreation Services, NEC            |
| 485991  | Special Needs Transport                          |                                    |   |
| 485999  | All Other Transit and Ground Passenger Transport |                                    |   |
| 487110  | Scenic and Sightseeing Transport, Land           |                                    |   |
| 487210  | Scenic and Sightseeing Transport, Water          |                                    |   |
| 487990  | Scenic and Sightseeing Transport, Other          |                                    |   |

Source: US Census Bureau

# Freedonia Methodology

The Freedonia Group, a subsidiary of MarketResearch.com, has been in business for more than 30 years and in that time has developed a comprehensive approach to data analysis that takes into account the variety of industries covered and the evolving needs of our customers.

Every industry presents different challenges in market sizing and forecasting, and this requires flexibility in methodology and approach. Freedonia methodology integrates a variety of quantitative and qualitative techniques to present the best overall picture of a market's current position as well as its future outlook: When published data are available, we make sure they are correct and representative of reality. We understand that published data often have flaws either in scope or quality, and adjustments are made accordingly. Where no data are available, we use various methodologies to develop market sizing (both top-down and bottom-up) and then triangulate those results to come up with the most accurate data series possible. Regardless of approach, we also talk to industry participants to verify both historical perspective and future growth opportunities.

Methods used in the preparation of Freedonia market research include, but are not limited to, the following activities: comprehensive data mining and evaluation, primary research, consensus forecasting and analysis, ratio analysis using key indicators, regression analysis, end use growth indices and intensity factors, purchase power parity adjustments for global data, consumer and end user surveys, market share and corporate sales analysis, product lifespan analysis, product or market life cycle analysis, graphical data modeling, long-term historical trend analysis, bottom-up and top-down demand modeling, and comparative market size ranking.

Freedonia quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or  $r^2$ . The most stable data series relative to the trend carries an  $r^2$  value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

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## Resources

### The Freedonia Group

#### Freedonia Industry Studies

*Global Motorcycles*, May 2018

*Recreational Vehicles in the US*, April 2018

*Recreational Boating in the US*, March 2018

*North America Automotive Aftermarket*, November 2017

*Global Bus Market*, May 2017

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*Freight Services: United States*

*Gambling: United States*

*Lodging Services: United States*

*Medium- & Heavy-Duty Trucks & Buses: United States*

*Motor Vehicles: United States*

*Recreation: United States*

*Restaurants & Foodservice: United States*

*Transport Equipment: United States*

*Travel Services: United States*

*Water Transport Services: United States*

#### Freedonia Custom Research

### Trade Publications

*Aviation Week*

*Business Jet Traveler*

*Busworld*

*Luxury Coach & Transportation*

*Mass Transit*

*Progressive Railroading*

*School Bus Fleet*

*Travel Weekly*

### Agencies & Associations

Airlines for America

American Bus Association

American Public Transportation Association

## About This Report

Cruise Lines International Association  
International Air Transport Association  
International Maritime Organization  
National Association for Pupil Transportation  
National Business Aviation Association  
New York City Taxi & Limousine Commission  
Regional Airline Association  
Taxicab, Limousine & Paratransit Association  
United Nations  
    International Civil Aviation Organization  
United States Department of Commerce  
    Bureau of Economic Analysis  
    United States Census Bureau  
United States Department of Transportation  
    Bureau of Transportation Statistics  
    Federal Aviation Administration  
    Federal Highway Administration  
    Federal Railroad Administration  
United States Energy Information Administration