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The Canadian passenger bus and urban transit industries, 2003 (preliminary) and 2002 (final)

Highlights

In 2003, just under 1500 companies in Canada were engaged in providing passenger bus and urban transit services for revenue. The number of companies dropped by 13% between 2002 and 2003, continuing the trend in industry consolidation.

Total revenue for the five bus industries (urban transit, interurban and rural, school bus, charter and other transit/shuttle), was $7.344 billion, an increase of 7.9% over 2002. Total expenditures were $6.447 billion, an increase of 3.8% over 2002. Net income in 2003 was $897 million, 51% higher than the previous year. Most of the increase in net income was attributable to increases in both operating and capital subsidies, decreases in interest payments and increases in operating margins.

The urban transit industry accounted for about two-thirds ($4.970 billion) of total revenues. School bus was next at $1.469 billion.

Approximately 90,000[1] people were employed by bus and urban transit companies in Canada (part-time staff have been converted into the full-time equivalents). This represents a decrease of 0.8% from 2002. The average expenditure for all employees, regardless of specific occupation, was about $42,500, an increase of 6.7%.

Human resource expenditures accounted for 62% of total operating expenses, fuel 9%, and vehicle maintenance 8%. These proportions remained virtually unchanged from 2002. The remaining 21% covered all other operating expenses such as license fees and permits, lease payments, taxes, utilities and insurance.

Capital investment in 2003 rose to $1.244 billion, a 6.3% increase from 2002. Just under half ($544 million) was spent on the acquisition of urban transit buses and other rolling stock. The school bus industry invested $111, million most of which was used to buy buses and other rolling stock. The interurban and rural bus industry invested just over $47 million on all capital expenditures, up from $42 million the year before.

1. Statistics Canada received corrected employment information that has resulted in a revision of employment estimates dating back to 2001. The tables in this Service Bulletin provide the updated figures.

May 2005

Statistics Canada Statistique Canada

Canada

How the information is presented

Statistics Canada uses the North American Industrial Classification System (NAICS)[2] to classify all companies operating in Canada. For the passenger bus and urban transit, there are five industries as follows:

485110 - Urban transit systems

485210 - Interurban and rural bus transportation (major activity is scheduled intercity services)

485410 - School and employee bus transportation

485510 - Charter bus industry

485990 - Other transit and ground passenger transportation (i.e. companies whose major business activity is the provision of shuttle services).

There are some urban transit, school bus and passenger bus operations that generate economic activity but are not included in one of the five NAICS categories.[3] To provide data users with a more complete picture of passenger bus and urban transit activities, each table presents information that includes the five NAICS industries as well as other activity that has been identified and for which data could be collected for operations that are outside of the five NAICS industries. There is no duplication of activity across groups e.g. urban transit operations in the "Other" category are not duplicated in the urban transit NAICS.

Companies offering bus and urban transit services

In 2003, just under 1500 companies in Canada were engaged in providing passenger bus and urban transit services for revenue. The number of companies dropped by 13% between 2002 and 2003, a continuation of several years of merger and acquisition activity across all the bus industries. Between 2001 and 2002, the number of companies decreased by about 5%.

Financial performance

Table 1 provides a financial overview of 2002, 2003 and the percentage change between the two years. Detailed estimates by industry for 2003 are presented in Table 2.

2. The North American Industry Classification System (NAICS) is an industry classification system developed by the statistical agencies of Canada, Mexico and the United States. Created against the background of the North American Free Trade Agreement, it is designed to provide common definitions of the industrial structure of the three countries and a common statistical framework to facilitate the analysis of the three economies. Companies are classified into one NAICS on the basis of which category represents the major business activity of that company.

3. Companies with bus or urban transit activities are not classified into one of the above five NAICS for two basic reasons: 1) Some cities do not separate transit budgets from city budgets. As a result, the financial data are captured in various Municipality NAICS categories rather than in the urban transit NAICS. 2) Companies that generate most of their revenues by providing sightseeing services are classified within a NAICS category that includes more than bus operations (e.g. horse drawn carriages, tourist rail operations, etc.). Thus, sightseeing bus operations are not included in any of the five bus NAICS.

Table 1: Overview of the Passenger Bus and Urban Transit Industries by Industry (NAICS)

Industry Code Description	Number of companies	Total Revenues	Total Expenses	Net Income
		$'000		
2003				
Bus industries				
Urban Transit	86	4,969,698	4,194,598	775,100
Interurban and Rural Bus	31	473,202	469,227	3,974
School and Employee Bus	973	1,468,696	1,356,705	111,991
Charter Bus	137	263,350	259,690	3,660
Other Transit and Ground Passenger	230	169,112	167,021	2,090
Sub Total	**1,457**	**7,344,057**	**6,447,242**	**896,816**
Bus activity in non bus industries				
Sightseeing	29	16,292	16,235	57
Other	11	132,080	154,993	(22,913)
Sub Total	**40**	**148,372**	**171,229**	**(22,856)**
Grand Total	**1,497**	**7,492,430**	**6,618,470**	**873,959**
2002				
Bus industries				
Urban Transit	96	4,461,864	3,946,912	514,952
Interurban and Rural Bus	41	481,229	465,628	15,601
School and Employee Bus	1,151	1,481,669	1,436,857	44,812
Charter Bus	137	235,015	216,877	18,138
Other Transit and Ground Passenger	250	149,219	146,554	2,665
Sub Total	**1,675**	**6,808,996**	**6,212,828**	**596,168**
Bus activity in non bus industries				
Sightseeing	24	14,540	14,649	(109)
Other	16	181,763	151,992	29,771
Sub Total	**40**	**196,303**	**166,641**	**29,662**
Grand Total	**1,715**	**7,005,299**	**6,379,469**	**625,830**
% Change 2003- 2002				
Urban Transit	-10.4%	11.4%	6.3%	50.9%
Interurban and Rural Bus	-24.4%	-1.7%	0.8%	-74.5%
School and Employee Bus	-15.4%	-0.9%	-5.6%	149.9%
Charter Bus	-0.2%	12.1%	19.7%	-79.8%
Other Transit and Ground Passenger	-8.1%	13.3%	14.0%	-21.6%
Sub Total	**-13.0%**	**7.9%**	**3.8%**	**50.4%**
Sightseeing	20.8%	12.1%	10.8%	-152.3%
Other	-31.3%	-27.3%	2.0%	-177.0%
Sub Total	**0.0%**	**-24.4%**	**2.8%**	**-177.1%**
Grand Total	**-12.7%**	**7.0%**	**3.7%**	**39.6%**

Table 2: Revenue and Expenses - 2003

	Bus industries						Bus activity in non bus industries			
	Urban Transit	Interurban and rural	School and employee	Charter Bus	Other transit-shuttle	**Sub Total**	Sight-seeing	Other	**Sub Total**	**Grand Total**
Estimate of the number of companies operating in Canada	86	31	973	137	230	**1,457**	29	11	40	**1,497**
				$'000				$'000		
Revenue										
Urban transit services	1,966,895	x	9,882	x	x	**2,003,354**	-	26,623	**26,623**	**2,029,977**
Commuter services	x	x	1,685	-	895	**203,862**	-	x	**x**	**233,930**
Urban transit services for persons with disabilities or seniors	10,490	x	25,478	-	13,521	**51,260**	-	x	**x**	**53,181**
Scheduled intercity services	x	285,371	28,708	4,215	x	**319,091**	-	-	**-**	**319,091**
School bus services	3,044	1,182	1,217,425	8,184	2,359	**1,232,193**	524	-	**524**	**1,232,717**
School bus charter services	x	1,589	83,127	x	x	**88,688**	x	-	**-**	**88,699**
Motor coach charter services	x	40,541	62,458	221,584	x	**326,762**	1,840	x	**x**	**328,604**
Local sightseeing services	68	x	x	x	89	**13,293**	13,825	x	**x**	**27,126**
Shuttle services	x	x	6,158	2,476	97,187	**107,696**	x	-	**x**	**107,706**
Bus parcel express	x	98,803	x	x	x	**100,762**	-	-	**-**	**100,762**
Other passenger bus services	4,797	2,230	12,418	14,792	x	**34,913**	x	-	**x**	**34,974**
Other operating revenues	104,450	3,497	4,338	1,978	x	**114,711**	x	445	**x**	**115,177**
Operating subsidies	1,769,968	x	15	-	44,213	**1,815,796**	-	x	**x**	**1,879,864**
Total Operating Revenue	**4,063,688**	**471,035**	**1,453,648**	**260,989**	**163,019**	**6,412,379**	**16,292**	**123,136**	**139,428**	**6,551,807**
Capital subsidies	877,834	x	-	-	x	**884,935**	-	x	**x**	**893,682**
Other non-operating revenues	28,176	x	15,048	2,361	x	**46,743**	-	x	**x**	**46,940**
Total Non-Operating Revenue	**906,010**	**2,167**	**15,048**	**2,361**	**6,092**	**931,678**	**-**	**8,944**	**8,944**	**940,622**
Total Revenue	**4,969,698**	**473,202**	**1,468,696**	**263,350**	**169,112**	**7,344,057**	**16,292**	**132,080**	**148,372**	**7,492,429**
Expenses										
Human resource expenses	2,758,651	201,385	679,458	87,553	115,164	**3,842,210**	5,322	85,573	**90,895**	**3,933,105**
Vehicle energy expenses	292,548	37,368	158,028	32,346	12,158	**532,449**	1,795	12,780	**14,576**	**547,024**
Vehicle maintenance expenses	299,096	38,072	119,249	29,867	10,340	**496,624**	2,796	17,153	**19,949**	**516,573**
Other operating expenses	697,192	182,641	329,707	94,350	27,061	**1,330,951**	5,679	36,058	**41,737**	**1,372,688**
Total operating expenses	**4,047,487**	**459,465**	**1,286,442**	**244,116**	**164,724**	**6,202,233**	**15,593**	**151,564**	**167,157**	**6,369,390**
Interest and other	147,111	9,762	70,263	15,574	2,298	**245,008**	642	3,429	**4,072**	**249,080**
Total expenses	**4,194,598**	**469,227**	**1,356,705**	**259,690**	**167,021**	**6,447,242**	**16,235**	**154,993**	**171,229**	**6,618,470**
Net income	**775,100**	**3,975**	**111,991**	**3,660**	**2,091**	**896,816**	**57**	**(22,913)**	**(22,857)**	**873,959**

X= 1) confidential to meet secrecy requirements of the Statistics Act;
2) suppressed because of high sampling variability.

Total revenues in 2003 including subsidies for the five passenger bus and urban transit industries were $7.344 billion, an increase of 7.9% from 2002. Total expenditures were 3.8% higher in 2003 compared to 2002, at $6.447 billion.

Net income rose by 51% between 2002 and 2003, from $596.2 million to $896.8 million. Four factors lead to this significant increase. Almost half (45%) of the increase was attributable to an increase in non-operating revenues. This was primarily a result of an increase in capital subsidies in the urban transit industry, which rose to almost $900 million in 2003 from about $700 million in 2002. A second contributing factor was declining interest rate payments. Third, there was an increase in operating margins. Net operating income grew to $210 million from $132 million in 2003. Finally, there was a significant increase in operating subsidies (primarily for urban transit operators), which rose almost $300 million, a 20% increase.

In 2003, there were some shifts in revenues and expenditures between the 5 bus and urban transit industries, as well as the other 2 groupings. These shifts were a result of mergers, acquisitions and offloading some bus activities from one company to another.

In terms of gross revenue, the largest of the five industries was urban transit, which generated revenues (including subsidies) of $4.97 billion, an increase of 11.4%. Expenditures in this industry grew to $4.19 billion in 2003 from $3.95 billion, a 6% increase.

Urban transit accounted for about two-thirds of total revenues generated by all the bus industries. It also expended the same proportion.

Between 2002 and 2003, there was a 10% increase ($384 million) in operating revenues in the urban transit industry. Revenues from the provision of core urban transit services rose $83 million, and commuter service operations increased by $13 million. However, the most significant change was the increase in both operating and capital subsidies, which rose by $300 million and $188 million respectively, whereas non-operating revenue fell by $64 million.

Expenditures in the urban transit industry on overall basis increased by almost $250 million (6%). The majority of this increase was related to human resource expenses, which grew by $192 million (7%). Fuel expenditures increased by 6% to $293 million. Maintenance expenses grew by 15% to reach $299 million.

Net income in the school bus industry rose from $45 million in 2002 to $112 million in 2003. Companies in this industry grossed $13 million less in 2003 than 2002, but they reduced costs by more than $80 million, attributable in part to a decrease in interest payments from $158 million in 2002 to $70 million in 2003.

Carriers in the Interurban and Rural industry (i.e. companies that generate most of their revenues form the provision of scheduled intercity line operations) experienced a decrease of $5 million in gross revenue, with a resulting $11.6 million decrease in net income. Operating revenues dropped by just over $9 million while operating costs increased by $17 million. Some of these changes were a result of mergers, acquisitions and offloading between the 5 bus industries. For example, although revenues obtained from the provision of charter operations by school bus companies decreased by almost $10 million, these revenues were gained in the charter bus industry. At the same time, operating margins in the charter bus industry fell in 2003 from $24.6 million in 2002 to $16.9 million in 2003, with the result that net income was only $3.7 million.

The overall impact of changes can be seen more clearly by comparing 2002 and 2003 Text Table 1, which includes all activities across Canada.

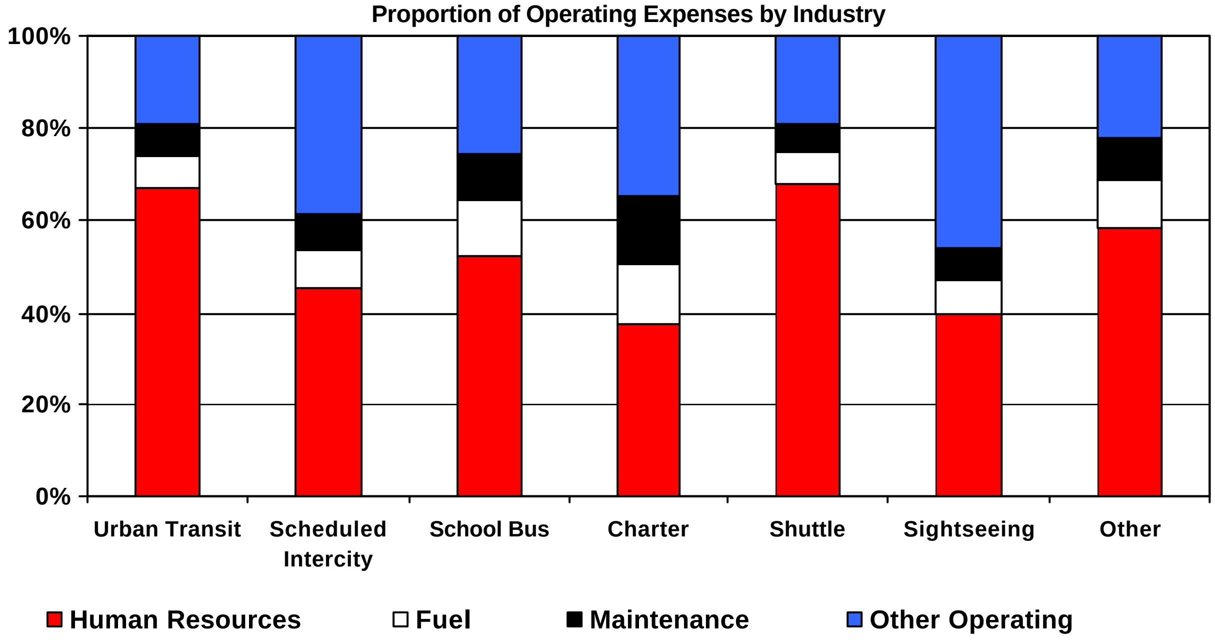
Comparison of 2002 and 2003 Revenues and Expenditures ($000) Based on all Activity in Canada

Revenues	**2002**	**2003**	**Difference**	**% Change**
Urban transit services	1,935,523	2,029,977	94,454	4.9%
Commuter services	227,277	233,930	6,653	2.9%
Urban transit services for persons with disabilities or seniors	x	x	x	x
Scheduled intercity services	328,891	319,091	-9,800	-3.0%
School bus services	1,220,253	1,232,717	12,463	1.0%
School bus charter services	75,826	88,699	12,873	17.0%
Motor coach charter services	321,285	328,605	7,319	2.3%
Local sightseeing services	25,528	27,126	1,598	6.3%
Shuttle services	82,996	107,706	24,710	29.8%
Bus parcel express	100,489	100,762	273	0.3%
Other passenger bus services	44,702	34,974	-9,729	-21.8%
Other operating revenues	133,948	115,177	-18,486	-13.8%
Operating subsidies	1,582,009	1,879,864	297,855	18.8%
Total Operating Revenue	**6,149,883**	**6,551,808**	**401,924**	**6.5%**
Capital subsidies	751,304	893,682	142,378	19.0%
Other non-operating revenues	104,072	46,940	-57,132	-54.9%
Total Non-Operating Revenue	**855,376**	**940,622**	**85,246**	**10.0%**
Total Revenue	**7,005,260**	**7,492,430**	**487,455**	**7.0%**
Expenses				
Human resource expenses	3,712,157	3,933,105	220,948	6.0%
Vehicle energy expenses	512,806	547,024	34,219	6.7%
Vehicle maintenance expenses	479,124	516,573	37,449	7.8%
Other operating expenses	1,340,593	1,372,688	32,095	2.4%
Total operating expenses	**6,044,680**	**6,369,390**	**324,711**	**5.4%**
Interest and other	334,790	249,080	-85,710	-25.6%
Total expenses	**6,379,469**	**6,618,470**	**239,001**	**3.7%**
Net income	**625,830**	**873,959**	**248,129**	**40.2%**

Between 2002 and 2003, there was little difference in how the companies spent their operating funds. Human resources accounted for 62% of operating expenses in 2003, and 2002. Fuel accounted for 9% in 2003, an increase of one percentage point over 2002. Maintenance and other operating costs remained at 8% and 22% respectively over the 2 years.

There were, however, differences between industries. Nevertheless, the proportions remained essentially the same between 2002 and 2003. Operating expenses, broken down by human resources, fuel, maintenance and other and other operating expenses are shown in Figure 1. Human resources accounted for about two-thirds of operating expenses in both the urban transit and shuttle industries, while the charter bus industry spent less than 40% on human resources. Fuel expenses varied between 7% for the urban transit, shuttle and sightseeing industries, rising to 12% and 13% for the school bus and charter bus industries. Maintenance accounted for 7% of urban transit rising to 15% for charter.

Figure 1
Proportion of Operating Expenses by Industry



Capital investment

Capital investment in 2003 amounted to $1.24 billion (see Table 3), an increase of 6.4% over 2002. The urban transit industry accounted for 86% of this total, up from 82% in 2002. This industry invested $544 million on buses and other rolling stock, up 21% from $450 million in 2002. This reflects the increase in capital subsidies. The School Bus industry invested $111 million in 2003, down from the $157 million invested in 2002. Most of the capital expenditures in the school bus industry were for the acquisition of buses and other rolling stock. Scheduled intercity carriers invested $47 million in 2003, up from $42 million in 2002.

Table 3: Capital Expenditures

	Bus industries						Bus activity in non bus industries			
	Urban Transit	Interurban and rural	School and employee	Charter Bus	Other transit-shuttle	**Sub Total**	Sight-seeing	Other	**Sub Total**	**Grand Total**
2003	$'000						$'000			
Purchase of buses and other rolling stock	543,919	38,232	104,575	10,847	3,675	**701,247**	-	1,315	**1,315**	**702,563**
Other capital expenditures	523,305	8,957	6,891	186	254	**539,594**	3	1,405	**1,408**	**541,002**
Total	1,067,224	47,189	111,466	11,034	3,929	**1,240,842**	3	2,720	**2,723**	**1,243,565**
2002										
Purchase of buses and other rolling stock	449,628	30,837	152,210	6,176	5,373	**644,224**	154	16,276	**16,430**	**660,653**
Other capital expenditures	505,172	11,594	4,575	155	127	**521,623**	49	5	**54**	**521,677**
Total	954,800	42,431	156,785	6,331	5,500	**1,165,847**	203	16,281	**16,484**	**1,182,330**
% Change 2003- 2002										
Purchase of buses and other rolling stock	21.0%	24.0%	-31.3%	75.6%	-31.6%	**8.9%**	-100.0%	-91.9%	**-92.0%**	**6.3%**
Other capital expenditures	3.6%	-22.7%	50.6%	20.2%	100.6%	**3.4%**	-94.2%	27646.9%	**2500.1%**	**3.7%**
Total	11.8%	11.2%	-28.9%	74.3%	-28.6%	**6.4%**	-98.6%	-83.3%	**-83.5%**	**5.2%**

Employment

The urban transit and passenger bus industries employed the equivalent of 90,000 people in 2003 across Canada. The urban transit industry was by far the largest employer, providing 47% of the jobs in the entire sector (see Table 4).

Table 4: Employment and Compensation

	Bus industries						Bus activity in non bus industries			
	Urban Transit	Interurban and rural	School and employee	Charter Bus	Other transit-shuttle	**Sub Total**	Sight seeing	Other	**Sub Total**	**Grand Total**
2003	Number of Full Time Equivalent Employees									
Drivers	24,513	3,035	31,404	2,514	2,449	**63,914**	207	1,006	**1,213**	65,127
Mechanics	4,852	439	1,337	143	42	**6,813**	7	83	**90**	6,903
Other employees	13,033	1,958	3,129	478	579	**19,178**	65	1,196	**1,261**	20,438
Total employees	**42,399**	**5,432**	**35,870**	**3,135**	**3,070**	**89,905**	**279**	**2,285**	**2,564**	**92,469**
				$'000				$'000		
Total compensation	2,758,651	201,385	679,458	87,553	115,164	3,842,210	5,322	85,573	**90,895**	3,933,105
Average expenditure per employee	$65,065	$37,073	$18,942	$27,931	$37,518	$42,736	$19,096	$37,444	$35,449	$42,534
2002	Number of Full Time Equivalent Employees									
Drivers	24,397	2,838	32,244	2,342	2,472	64,293	214	1,003	**1,216**	65,509
Mechanics	4,540	322	1,517	117	69	6,565	7	110	**118**	6,683
Other employees	13,035	1,783	3,843	450	633	19,744	56	1,167	**1,223**	20,968
Total employees	**41,972**	**4,943**	**37,604**	**2,909**	**3,175**	**90,603**	**277**	**2,280**	**2,557**	**93,160**
Total compensation	2,566,816	199,928	676,765	78,287	97,750	**3,619,545**	5,701	86,912	**92,612**	**3,712,157**
Average expenditure per employee	$61,155	$40,446	$17,997	$26,913	$30,792	$39,950	$20,561	$38,118	$36,215	$39,847
% Change 2003 - 2002										
Drivers	0.5%	6.9%	-2.6%	7.4%	-1.0%	-0.6%	-3.2%	0.4%	-0.3%	-0.6%
Mechanics	6.9%	36.4%	-11.9%	21.9%	-39.3%	3.8%	-4.9%	-24.5%	-23.3%	3.3%
Other employees	0.0%	9.8%	-18.6%	6.1%	-8.5%	-2.9%	15.5%	2.5%	3.1%	-2.5%
Total employees	**1.0%**	**9.9%**	**-4.6%**	**7.8%**	**-3.3%**	**-0.8%**	**0.5%**	**0.2%**	**0.3%**	**-0.7%**
Total compensation	7.5%	0.7%	0.4%	11.8%	17.8%	6.2%	-6.6%	-1.5%	-1.9%	6.0%
Average expenditure per employee	6.4%	-8.3%	5.3%	3.8%	21.8%	7.0%	-7.1%	-1.8%	-2.1%	6.7%

In 2003, part time staff worked about 5 million hours, most of which occurred in the school bus industry, which accounted for 67% of total part time hours. The next largest part time employer was the urban transit industry which accounted for 27% of total part time hours.

Average expenditure (i.e. including wages, salaries, benefits driver related costs, training, etc.). in 2003, for each full time equivalent position was slightly over $42,000 up from $40,000 in 2002.

The fleet

The for-hire bus and urban transit fleet in Canada as defined by the five NAICS industries comprised almost 57,000 vehicles with 62% of these in the School and Employee Bus industry. The distribution by vehicle type and industry is shown in Table 5.

Table 5: Revenue Equipment Operated

	Bus industries						Bus activity in non bus industries			
	Urban Transit	Interurban and rural	School and employee	Charter Bus	Other tran-sit-shuttle	**Sub Total**	Sight-seeing	Other	**Sub Total**	**Grand Total**
	number									
2003										
Motor coaches	328	1,300	913	1,266	441	4,248	87	4	**91**	**4,339**
School buses	36	77	32,370	578	414	33,474	21	-	**21**	**33,495**
Urban transit buses	12,288	107	104	84	72	12,655	-	423	**423**	**13,078**
All other rolling stock	3,146	86	2,187	272	870	6,561	64	452	**516**	**7,077**
Total	**15,798**	**1,570**	**35,573**	**2,200**	**1,797**	**56,938**	**172**	**879**	**1,051**	**57,989**
2002										
Motor coaches	262	1,350	1,047	1,321	370	4,350	59	3	**62**	**4,412**
School buses	63	100	29,890	743	491	31,288	21	-	**21**	**31,309**
Urban transit buses	11,874	52	290	148	205	12,568	-	432	**432**	**13,000**
All other rolling stock	3,393	219	2,955	217	759	7,543	72	212	**284**	**7,827**
Total	**15,592**	**1,721**	**34,182**	**2,429**	**1,825**	**55,749**	**152**	**647**	**799**	**56,548**
% Change 2003 - 2002										
Motor coaches	25.2%	-3.7%	-12.9%	-4.2%	19.3%	-2.4%	47.5%	33.3%	46.8%	-1.7%
School buses	-42.9%	-23.0%	8.3%	-22.3%	-15.8%	7.0%	0.0%		0.0%	7.0%
Urban transit buses	3.5%	105.8%	-64.2%	-43.1%	-64.8%	0.7%		-2.1%	-2.1%	0.6%
All other rolling stock	-7.3%	-60.7%	-26.0%	25.4%	14.6%	-13.0%	-11.1%	113.2%	81.7%	-9.6%
Total	**1.3%**	**-8.8%**	**4.1%**	**-9.4%**	**-1.5%**	**2.1%**	**13.2%**	**35.9%**	**31.5%**	**2.5%**

As discussed earlier, there were shifts in activity (and, therefore, rolling stock) between NAICS industries. This accounts for what appears to be significant changes in the fleet.

Fuel consumption

Table 6 presents information on the amount of fuel reported used in 2003 compared to 2002. Diesel fuel is the single most important fuel used by the industry with electricity also very important in urban transit operations such as subways, streetcars and trains.

Table 6: Fuel Consumption

		Bus industries						Bus activity in non bus industries			
		Urban Transit	Interurban and rural	School and employee	Charter Bus	Other transit-shuttle	**Sub Total**	Sight-seeing	Other	**Sub Total**	**Grand Total**
2003											
Diesel	'000 L	390,919	61,356	247,884	48,208	14,159	762,526	2,501	19,576	**22,077**	**784,603**
Gasoline	'000 L	1,879	41	5,016	110	1,742	8,788	2	-	**2**	**8,790**
Propane	'000 L	772	-	1,809	-	3,932	6,514	-	-	**-**	**6,514**
Natural gas	'000 L	16,579	-	-	-	-	16,579	-	-	**-**	**16,579**
Electricity	'000 KW	781,755	-	-	-	-	781,755	-	22,505	**22,505**	**804,260**
2002											
Diesel	'000 L	387,135	61,474	217,991	41,770	12,624	720,994	1,417	24,011	**25,429**	**746,423**
Gasoline	'000 L	1,659	142	5,780	722	1,844	10,146	201	-	**201**	**10,347**
Propane	'000 L	-	15	5,383	-	4,944	10,343	-	-	**-**	**10,343**
Natural gas	'000 L	15,826	-	-	-	395	16,221	-	-	**-**	**16,221**
Electricity	'000 KW	756,583	-	-	10	-	756,593	-	22,563	**22,563**	**779,156**
% Change 2003 - 2002											
Diesel		2.2%	-0.2%	13.7%	15.4%	12.2%	6.4%	76.5%	-18.5%	-13.2%	**5.8%**
Gasoline		13.3%	-71.3%	-13.2%	-84.7%	-5.5%	-13.4%	-99.0%	…	-99.0%	**-15.0%**
Propane		…	-100.0%	-66.4%	…	-20.5%	-37.0%	…	…	…	**-37.0%**
Natural gas		-37.3%	…	…	…	-100.0%	-38.9%	…	…	…	**-38.9%**
Electricity		3.3%	…	…	-100.0%	…	3.3%	…	-0.3%	-0.3%	**3.2%**

Diesel fuel consumption increased by 6% over 2002, and electricity by 3.2%.

Revenue by Geographic region

Prior to 2001, geographic information published by Statistics Canada in Catalogue *53-215 Passenger Bus and Urban Transit Statistics* by province and territory was based on the location of the head office of the company rather than where the activity took place. With the redesign of the survey commencing in 2001, respondents are asked to provide the breakdown of revenue and expenditure data where the activity took place. Tables 7, 8 and 9 present revenue and expenditure data by region.

Table 7: Total Revenue by Province and Territory

	Urban Transit industries	Other Bus industries	Non bus industries
	$'000		
2003			
Newfoundland	12,029	23,018	78
Prince Edward Island	-	870	2,379
Nova Scotia	35,936	30,961	1,858
New Brunswick	13,298	13,994	-
Quebec	1,154,075	673,695	78,726
Ontario	2,445,289	942,296	2,007
Manitoba	119,124	47,692	-
Saskatchewan	x	66,769	-
Alberta	519,731	364,741	428
British Columbia	634,543	201,302	60,029
Yukon, Northwest Territories & Nunavut	x	5,440	-
Grand Total	**4,972,613**	**2,374,045**	**147,519**
2002			
Newfoundland	5,489	23,888	72
Prince Edward Island	-	663	3,085
Nova Scotia	30,732	28,724	1,911
New Brunswick	12,518	11,961	-
Quebec	1,107,042	705,474	111,599
Ontario	2,189,215	938,789	3,275
Manitoba	103,200	47,888	-
Saskatchewan	x	62,638	-
Alberta	400,939	318,200	415
British Columbia	576,069	202,353	73,401
Yukon, Northwest Territories & Nunavut	x	4,402	2,546
Grand Total	**4,462,231**	**2,346,764**	**196,304**
% Change 2003 - 2002			
Newfoundland	119.1%	-3.6%	7.9%
Prince Edward Island	…	31.1%	-22.9%
Nova Scotia	16.9%	7.8%	-2.7%
New Brunswick	6.2%	17.0%	…
Quebec	4.2%	-4.5%	-29.5%
Ontario	11.7%	0.4%	-38.7%
Manitoba	15.4%	-0.4%	…
Saskatchewan	x	6.6%	…
Alberta	29.6%	14.6%	3.2%
British Columbia	10.2%	-0.5%	-18.2%
Yukon, Northwest Territories & Nunavut	x	23.6%	-100.0%
Grand Total	**11.4%**	**1.2%**	**-24.9%**

Table 8 Revenue by Region - 2003

	Canada	Atlantic	Quebec	Ontario	Prairies [1]	B.C.
	$'000					
Revenue						
Urban transit services	2,029,977	34,044	503,859	988,651	221,337	282,085
Commuter services	233,930	422	36,409	188,101	541	8,457
Urban transit services for persons with disabilities/seniors	53,181	371	12,989	27,245	6,352	6,224
Scheduled intercity services	319,091	14,124	54,473	111,425	77,219	61,850
School bus services	1,232,717	35,804	428,170	528,740	211,878	28,124
School bus charter services	88,699	419	25,827	50,078	9,746	2,629
Motor coach charter services	328,605	12,031	81,372	85,497	95,307	54,398
Local sightseeing services	27,126	2,679	2,102	4,314	330	17,701
Shuttle services	107,706	1,128	8,679	82,980	11,658	3,261
Bus parcel express	100,762	3,575	6,322	7,884	54,813	28,168
Other passenger bus services	34,974	1,121	7,469	18,709	7,130	543
Other operating revenues	115,462	3,117	38,102	58,187	8,223	7,832
Operating subsidies	1,879,864	24,002	616,666	601,473	252,983	384,741
Total Operating Revenue	**6,551,808**	**132,552**	**1,822,439**	**2,753,284**	**957,518**	**886,014**
Capital subsidies	893,682	1,861	63,939	618,124	204,700	5,058
Other non-operating revenues	46,940	8	20,243	14,432	6,948	5,309
Total Non-Operating Revenue	**940,622**	**1,869**	**84,181**	**632,556**	**211,648**	**10,367**
Total Revenue	**7,492,430**	**134,421**	**1,906,620**	**3,385,841**	**1,169,166**	**896,381**

[1] Yukon, N.W.T. & Nunavut are combined with the Prairies.

Table 9: Expenses by Region

	Canada	Atlantic	Quebec	Ontario	Prairies [1]	B.C.
2003	$'000					
Expenses						
Human resource expenses	3,933,105	77,210	1,105,192	1,724,506	544,108	482,089
Vehicle energy expenses	547,024	13,557	138,539	247,021	88,507	59,401
Vehicle maintenance expenses	516,573	15,745	111,855	236,221	83,984	68,767
Other operating expenses	899,628	16,233	230,384	344,913	187,620	120,480
Sub Total	**5,896,331**	**122,744**	**1,585,970**	**2,552,661**	**904,219**	**730,737**
Depreciation	473,060	…	…	…	…	…
Total operating expenses	**6,369,390**	…	…	…	…	…
Interest and other	249,080	…	…	…	…	…
Total expenses	**6,618,470**	…	…	…	…	…
2002						
Human resource expenses	3,712,157	68,631	1,046,283	1,633,814	508,739	454,691
Vehicle energy expenses	512,806	12,447	134,675	233,814	77,596	54,273
Vehicle maintenance expenses	479,124	13,083	119,126	222,266	68,316	56,333
Other operating expenses	852,099	18,513	232,698	325,907	156,711	118,270
Sub Total	**5,556,186**	**112,674**	**1,532,782**	**2,415,801**	**811,362**	**683,567**
Depreciation	488,494	…	…	…	…	…
Total operating expenses	**6,044,680**	…	…	…	…	…
Interest and other	334,790	…	…	…	…	…
Total expenses	**6,379,469**	…	…	…	…	…
% Change 2003 - 2002						
Human resource expenses	6.0%	12.5%	5.6%	5.6%	7.0%	6.0%
Vehicle energy expenses	6.7%	8.9%	2.9%	5.6%	14.1%	9.4%
Vehicle maintenance expenses	7.8%	20.4%	-6.1%	6.3%	22.9%	22.1%
Other operating expenses	5.6%	-12.3%	-1.0%	5.8%	19.7%	1.9%
Sub Total	**6.1%**	**8.9%**	**3.5%**	**5.7%**	**11.4%**	**6.9%**
Depreciation	-3.2%					
Total operating expenses	**5.4%**					
Interest and other	-25.6%					
Total expenses	**3.7%**					

1. Yukon, N.W.T. & Nunavut are combined with the Prairies.

The data provided in Table 8 are at the most detailed level possible while maintaining confidentiality as required by the Statistics Act. The regions of “Atlantic” and “Prairies” were chosen as a result of the confidentiality of the provincial data. The data are estimates based on information provided by respondents. A cost accounting methodology to provide the estimates (i.e. an actual invoice by invoice analysis by geographic region) was not conducted. This may account for some of the variation on a year to year basis.

Ontario accounted for a significant portion (45%) of all revenues grossed in Canada, at $3.4 billion, with Quebec next at $1.9 billion (25%).

Operating expenditures in Ontario amounted to $2.6 billion (43% of the Canadian total), followed by Quebec at $1.6 billion (27%).

The change in net income between 2002 and 2003, explained by four factors previously described, resulted in changes in provincial/territorial distributions of revenue and expenditure. These were primarily non-operating revenues but they have affected the distribution on a year to year basis.

Passenger trips

In 2003, the total number of scheduled intercity passenger trips reported totalled 13.976 million, 7.4% lower than the 15.098 million the previous year.

There were 1.656 billion urban transit and commuter passenger trips made in 2003 by bus, subway, streetcar, and commuter train, an increase of 2% over the 1.626 billion passenger trips made in 2002.

Maintenance cost by vehicle type

Maintenance cost per kilometre by vehicle type are presented in Table 10. Information is presented for three aggregate bus types: motor coaches, school buses and urban transit buses. Within each of these three bus types, there are different vehicle lengths, model types and passenger capacities. However, the data presented in the table represent an aggregate average regardless of model variations.

Maintenance expenditures include vehicle parts, shop supplies, tires, tubes, and purchased repairs. Labour costs that are incurred directly by the respondent are excluded, although labour expenses may be included when the company purchases repairs from another company.

Urban transit buses cost more per kilometre to maintain that the other 2 groups. This is primarily a result of significant stop and go urban driving, which is hard on consumable parts such as brakes. Motor coaches tend to do more highway driving, with less stop and go traffic. However, these vehicles often contain technologically advanced equipment which may cost more to maintain than other bus types. Depending on the route, some school buses may also exhibit a significant degree of stop and go driving, especially during the collection and drop off of students, but the design of these buses may contribute to the lower maintenance costs when compared to the other bus types.

Table 10: Maintenance cost per km

Maintenance Cost Cents per km	**2001**	**2002**	**2003**
Motor coaches	0.22	0.24	0.25
School buses	0.13	0.15	0.14
Urban transit buses	0.29	0.30	0.29

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