



Routes to Recovery

Includes 2021
Year-in-Review

2022 Outlook for the Intercity Bus Industry in the United States

The Chaddick Institute's Annual *Intercity Bus Review* | February 24, 2022
By Joseph P. Schwieterman, Abby Mader, and Allison Woodward

The competitive mix of the U.S. intercity bus industry at the start of 2022 was dramatically different from that of early 2020, when the COVID-19 pandemic plunged the sector into crisis and raised questions about the survivability of numerous prominent lines. Greyhound-owned BoltBus, LuxBus, and several other familiar carriers succumbed, while federal support for commercial bus lines proved slow to materialize. When more financial assistance arrived, the amount paled in comparison to that provided to air, public transit, and intercity rail operators. All the while, chronic driver and mechanic shortages continued to impair operations.

Routes to Recovery shows that the past calendar year was nonetheless a dynamic time for scheduled long-distance bus travel—and one that ended with both positive indications of a promising future and perplexing questions about future directions. The analysis provided below builds [on our policy brief](#), *The Intercity Bus Bounceback: 4th Quarter Trends Bring Optimism to a Struggling Sector*, released last month, showcasing key developments for 2021, including:

- FlixBus's heavily publicized purchase of Greyhound Lines
- The reinstating of interline routes was annulled during the pandemic
- Optimism stems from the November passage of the Bipartisan Infrastructure Bill.

[The brief](#) cautions that most charter, tour, and commuter-bus operators have yet to see a significant recovery, and because of that many such companies remain on a financial precipice.

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Photo caption (above): A BESTBUS DEPARTURE IN MIDTOWN MANHATTAN, JUNE 2021
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AFTER TWO YEARS OF THE PANDEMIC, HOW'S THE BUS INDUSTRY DOING?

The intercity bus industry has rebounded more slowly from **the depths of the COVID-19 pandemic** than Amtrak and commercial airlines for a variety of reasons, including traveler apprehension about contracting the virus on bus trips, which tend to be longer in duration than other forms of travel on the same route, and anxiety about conditions in urban bus terminals. Personal auto traffic continued to rise during the pandemic and, along with home delivery service traffic, has added to congestion in some metropolitan areas and intercity arterials. Furthermore, a **lag in federal funding** was compounded by the limited amount of assistance eventually provided. Although Washington's help kept many bus lines afloat, carriers that had traditionally operated without public subsidy received only modest support relative to that for other modes. Our analysis, drawing upon Transcor Data Service data, showed that in late 2020, passenger traffic remained at just 45% of pre-pandemic levels, and was a mere 25% - 35% in the Northeast and California.

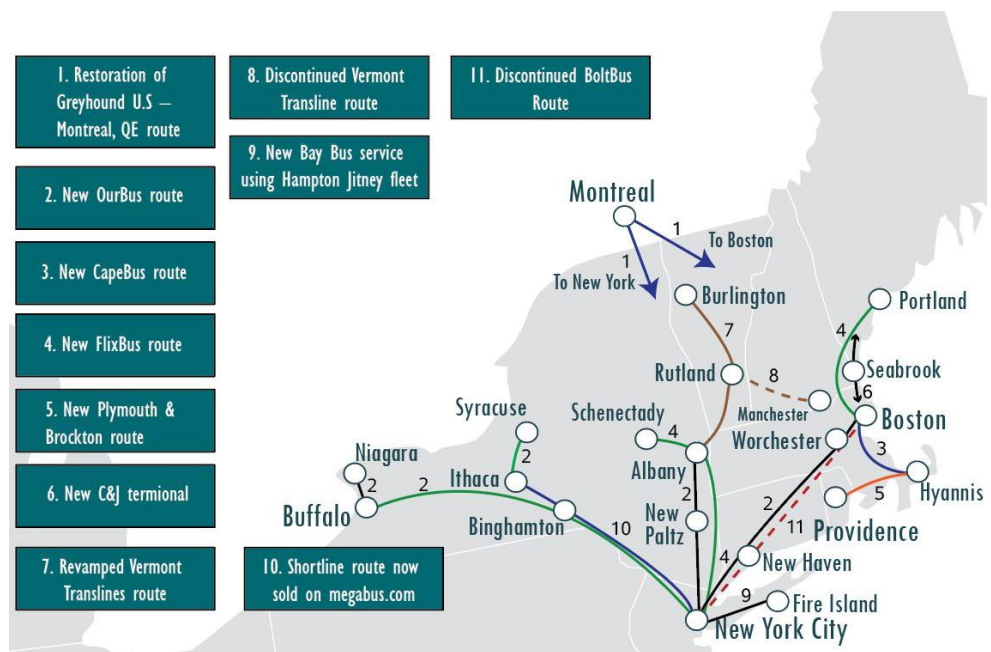
Thankfully, a strong recovery took root last autumn, pushing nationwide traffic up to perhaps 60 - 65% of pre-pandemic levels by Thanksgiving. The Omicron variant sent the recovery into reverse during the second week of December 2021, although the extent of the decline has not been publicly reported. Based on our discussions with industry leaders, however, traffic is growing again, and we believe mid-size to large bus lines on non-commuter routes **are now carrying perhaps 60 – 70% of pre-pandemic passenger volumes**, albeit during a traditionally slow travel period. Approximately 70 – 75% of the bus-miles that were on the road before the pandemic appear to be back. (There is much regional variation and uncertainty about prevailing service levels). BoltBus and at least a dozen smaller scheduled operators have not returned to the roads. We **anticipate a sustained recovery**, mirroring autumn, through the summer, pushing traffic to levels detailed on page 16, a trend supported by the **rise in gasoline costs** and the initiatives outlined below. Of course, these projections assume no major shifts in the direction of the pandemic.

The following sections provide a more micro-level assessment of notable competitive moves in different regions of the US Mainland, starting in the East and moving to the West, followed by conclusions and prognostications.

NEW ENGLAND & NEW YORK STATE

The intercity-bus landscape of this region changed in 2021 due to notable shifts on rural routes and new services aimed at pandemic-weary travelers headed to beach resorts. On major city-to-city routes, however, the changes were less dramatic than in other parts of the country. The level of competition on the Boston – New York route is now largely the same as it was before the pandemic, with most established lines, save for BoltBus, which was permanently suspended in August

Figure 1: Notable New Routes of New England and New York State



2021, once again offering extensive schedules. Even without **BoltBus**, Boston – New York remains a competitive hotbed. Seven companies, **GoBuses**, **FlixBus**, **Greyhound Lines**, **Lucky Star**, **Megabus**,

OurBus, and **Peter Pan** currently offer multiple daily schedules between these cities or nearby suburbs while, **C&J Bus Lines**, **Concord Coach** and **Dartmouth Coach** link northern New England to New York, allowing customers to bypass Boston.

On September 8th, **Greyhound** [resumed transborder service](#) from Boston and New York to Montreal, QC, and from Buffalo to Toronto, ON. These routes have historically been major revenue generators for the legacy line, with the New York – Montreal running in partnership with Adirondack Trailways. Greyhound notably restarted service to Canada sooner than Amtrak, which had yet to resume operations across the border (or even announce a definitive date for doing so), in part due to uncertainty over policy, especially with regard to the Canadian government.

In May, **Plymouth & Brockton (P&T)** reinstated its service between Boston and Hyannis, MA, and other Cape Cod points. The carrier, part of The Cape’s transportation scene for more than 135 years, also [launched](#) between Hyannis and TF Green Airport in metropolitan Providence, RI. This new four-times daily service offers a lower-cost alternative to its Boston’s Logan Airport service. During peak times, the Boston route sees buses every 30 minutes, and it was further enhanced by the addition of midday express service between Logan, Hyannis, and other peninsular points in August.



Furthermore, P&B gained regulatory approval to carry passengers between Woods Hole to the above two airports as well as downtown Boston. The [August launch](#) of this service was followed by the October addition of a



Megabus double-decker approaches its curbside zone on Manhattan’s East Side in January 2022.

[West Bridgewater, MA](#), stop in metropolitan Boston. Peter Pan has long been the dominant player in the Boston - Woods Hole route. P&B service is scaled seasonally, but as the carrier grows, it is increasingly becoming a multi-purpose transportation provider throughout Cape Cod. P&B now handles a significant share of traffic bound for the popular Buzzards Bay and Martha’s Vineyard regions, although its route to Provincetown, MA, a resort near the tip of the cape, is gone, having fallen victim to the loss of state funding (local public bus service remains serving Provincetown, by connection).

A new player on this same peninsula, **CapeBus**, the intercity bus unit of charter operator **A Yankee Line**, began a Boston – Hyannis service in June, giving customers [multiple daily options](#) in each direction with stops at Sagamore and Barnstable. Its partnership with Greyhound allows for ticketing on the national carrier’s online platform. CapeBus’s service, provided using its parent company’s charter fleet, is a premium offering, with leather seats and other amenities.

C&J Bus Lines has ramped up its service linking Northern New England and New York and has [opened a new state-of-the-art](#) terminal and parking facility in Seabrook, NH. The spacious facility, christened in June, sees departures to Boston’s South Station, Logan, and New York, and it replaces a park & ride in Newburyport, MA, owned by the state. In September, C&J reintroduced express service to South Station from Dover, Portsmouth, and Seabrook, NH.



A passenger talks with an agent at the Greyhound’s attractive and back-lit ticket office at the Port Authority Bus Terminal in New York

In June, **Bay Bus** began a service catering to the large LGBTQ+ community that heads to Long Island’s Fire Island during the summer. Though an independent brand, service is provided using Hampton Jitney’s charter coaches. Passengers could choose among several trips weekly runs from Midtown Manhattan to Fire Island Pines and Cherry Grove Ferries. Bay Bus proved to be a popular alternative to the often-crowded **Long Island Rail Road** trains.

FlixBus made several significant moves involving New York state, including the [launch of a daily round trip](#) connecting New York City to Albany, Schenectady, and Utica, NY in November. This gives college students and residents a “one-seat” trip on FlixBus comparable to that of Amtrak’s Empire Service. FlixBus’s partnership with Vermont TransLines, meanwhile, allows New Yorkers to buy through tickets to Rutland and Burlington, VT. This route involves a transfer at Albany-

Rensselaer, analogous to Amtrak Thruway bus connections at that same station, which in late 2022 will be supplemented by an extension of Amtrak’s New York and Albany train service from Rutland to Burlington).

In June, FlixBus [lengthened its New York – Boston route](#) to Portsmouth, NH and Portland, ME. By early 2022, however, this service had been annulled, apparently due to the seasonal downturn in demand and the continuing pandemic. Another partnership, between FlixBus and Gotham-based **OvrRide**, a travel broker specializing in tours and activities, allows FlixBus to “[cross-sell](#)” seats on its partner’s coach service from Midtown Manhattan to Rockaway Beach in Queens. This gives FlixBus’s customers one-seat rides from Midtown to the popular coastal destination during the summer season, compared to the multi-seat rides often required for those taking public transportation. Meanwhile, **Hampton Jitney** is maintaining and vigorously

promoting its Ambassador Class to The Hamptons. Ridership appears to have been strengthened by the continuing concerns about overcrowding on the Long Island Rail Road.



Coach USA's ShortLine unit began selling weekend and college break service between New York and Hamilton, Colgate, Norwich, and Cortland and other upstate New York points on megabus.com. Its daily New York - Binghamton - Ithaca service is also now on the platform.

OurBus [launched](#) an additional frequency between New York, Buffalo and Niagara Falls, NY in May, running via Binghamton, Corning, Elmira, and Geneseo. The carrier also debuted its Ithaca – Syracuse Airport, NY service in April. In September, ahead of the U.S./Canada border's reopening, OurBus began a Toronto-Buffalo service with connections to its Buffalo - New York route. That same month, the carrier [began service](#) between Albany and New York via New Paltz and the Woodbury premium outlet mall. Finally, in October, OurBus started service between New York and Boston via Worcester, MA, also stopping in Bridgeport and New Haven, CT. These moves significantly increased OurBus's presence throughout the Northeast region, which primarily involved building a wider route network rather than adding frequencies to existing routes.

Traditional and long-standing Northeastern carriers such as **Peter Pan**, **Adirondack Trailways** (and affiliated **New York Trailways** and **Pine Hill Trailways**), and **Martz Trailways**, have withstood the pandemic, but seen much

of their regular daily commutation markets hit by reduced travel and working from home. However, their intercity corridor, university, and recreation-destination services are rebounding, and continue to offer multiple daily (even hourly) departures between key points throughout the region. The Trailways carriers are refining the Trailways.com platform, and in the case of Adirondack, share the Greyhound.com platform for some routes, as well

MID-ATLANTIC STATES

Bus service on the busy New York – Washington route rebounded sharply in late 2021 but remains highly fragmented compared to service on the New England routes. As we have noted in [past reports](#), the pandemic hit bus travel in this region harder than in most other areas. Despite this, by the end of the year, more than 15 bus lines were again carrying passengers between New York and Washington. All but two offered several departures per day. Two, Tripper and Vamoose, had both regular and business-class options. Ten carriers operate from Midtown Manhattan, with the rest from New York's Canal Street area (Chinatown). (See map in appendix). Four of these carriers, FlixBus, Greyhound, Megabus, and Peter Pan, rank among the largest intercity bus providers in the United States.

Among the rest is a startup, **The Jet**, which gained heavy publicity when it launched its twice- daily [premium service between New York's Hudson Yards](#) and Washington DC's Metro Center in November. With just 14 seats (in a 2-1 seating configuration) on its full-size coaches, and an on-board attendant serving light snacks and alcoholic and non-alcoholic beverages, The Jet offers even more spaciousness than **Texas's Vonlane** and is comparable to the now-defunct **Limoliner**, which once linked central Manhattan and Boston. Yet, unlike other first and business class offerings, The Jet offers the ["HoverSeat"](#), a custom designed seat equipped with Bose suspension technology, which is said to "block 90% of the bus ride's bumps and movements." Coupled with a stepped-up air filtration system (reportedly like those

used in ambulances), and enhanced WiFi, much like that used by tech companies in their employee shuttles, The Jet seeks to add a new level of comfort to the ground-



A Peter Pan express departure for the Port Authority Bus Terminal is boarding at Philadelphia in June 2021

travel experience. Fares are typically between \$99 and \$149, less than half the cost of walk-up airlines and Amtrak’s Acela fares (although, service does not operate on mid-weekdays).

Peter Pan Bus Lines started [service to Greenbelt, MD](#), a suburb of Washington, filling a void left by the demise of BoltBus, which had been a major player in the New York – Washington corridor. Several Peter Pan buses call at Greenbelt daily, but passengers headed for New York must connect in Baltimore. [Also, in Baltimore](#), plans are afoot to preserve a classic Greyhound station at 601 N. Howard Street that was designed by William Strudwick Arrasmith in the Streamline Moderne style. The station was replaced by a newer station south of downtown that opened in 2016. The best-known Arrasmith station still being used for bus travel is the Cleveland Greyhound Station, which remains a busy Greyhound hub.

OurBus started a New York-Atlantic City service in April, helping to bring together independently owned bus lines and organizing them into a more cohesive and accessible network. Generally, its service

has multiple departures in each direction daily, and connects New York with Galloway, NJ, and the three Atlantic City casinos. OurBus also started an Atlantic City - Philadelphia-Washington service in August, which was paused in October. In the same month, yet another was route debuted, linking Baltimore to New York via Christiana, DE, a town near Wilmington. Christiana previously lacked any long-distance bus service. OurBus’ Christiana Mall bus stop is just a short distance from historic Clemente’s Rest (aka State Road DE), previously a rest stop for buses between the Northeast and southern points on both the mainland and Delmarva Peninsula.

Rapid Overland Express relaunched its [premium express service between Virginia Beach and Pentagon City, VA](#), in July, once again with an onboard attendant. The

Pentagon City terminus allows for convenient connections to Washington, DC via the Metro, cabs, and rideshares. Passengers travel in the comfort of deluxe coaches with 22 seats and enjoy catered meals during breakfast and lunch, served by an attendant. “ROX”

Figure 2: Notable New Routes of the Mid-Atlantic Region



offered four trips weekly after restarting service (which debuted in 2020) and, while apparently briefly running daily, is back to four times weekly. [Another route](#), connecting Virginia Beach with Charlottesville, VA, was introduced in September but was suspended after the autumn season.

In July, [FlixBus partnered with mobility startup](#) Revel to

As part of the [continued expansion](#) of **Virginia Breeze**, a service funded by Virginia’s transportation department, the “Highlands Rhythm” took to the roads in November. The once-daily roundtrip links Bristol, VA and Washington, DC with stops at Wytheville, Christiansburg, Harrisonburg, Dulles International Airport, and other points. As with the Breeze’s three other routes, customers can buy tickets on the [megabus.com](#) platform. Through ticketing is available to Baltimore, Philadelphia, and New York for those making transfers in the nation’s capital.

Another subsidized service, **Mountain Lines Transportation Authority’s** rural [route from Montgomery to Fayetteville, WV](#), began in October. Among the dozens of rural offerings available before the pandemic in this region, most have returned to the road, abetted by the relatively strong federal support for rural service provided by public-transit operators. (Check the Chaddick website in April for our brief on the country’s expansive rural-route network.)

In its planning, **Amtrak** appears to be taking a more aggressive stance to build out its network with connecting Amtrak Thruway bus services in the mid-Atlantic states than in other regions.

Figure 3: Notable New Routes of the South and Florida



give those using both services in the Northeast Corridor special discounts. The partnership, promoted as an opportunity to foster first- and last-mile connections using Revel’s mopeds, e-bikes, and buses, is one of the first efforts we have identified that involves intercity buses and a micro-mobility startup. More conventionally, FlixBus also partnered with **Wanda Coach**, a prominent local New York carrier that leaves from Canal Street (Chinatown), to offer a one seat ride between New York and Atlanta. This nocturnally timed service also serves popular North Carolina destinations, including Durham, Greensboro, and Charlotte, as well as Greenville, SC. One round trip operates daily in each direction. *Please refer to Appendix A for an analysis and map of bus routes from the Canal Street area in New York.*

SOUTH AND SOUTHEAST

Initiatives in the South and Southwest were less comprehensive than in most other regions, partly due to the tendency for the pandemic-related traffic drop to be smaller than in other parts of the country, which helped sustain service. The now-defunct BoltBus never served this region, and most other providers, including Greyhound, RedCoach, and **Southeast Trailways**, had extensive offerings through most of the year.

In July, [FlixBus launched service](#), from Jacksonville, FL, on its Orlando to Atlanta line, which also serves Daytona Beach, FL and Macon, GA. However, as of early this

year, Jacksonville service had been suspended, possibly to return during peak season.

Jet Set Express, which sells tickets on the gotobus.com, has become a more prominent player in the Miami – Orlando market, expanding to three daily roundtrips on some days. From its southern terminus at Miami International Airport, it makes numerous stops at area hotels, a strategy that is particularly common among bus lines in Florida and Nevada. It competes with **Greyhound**, **FlixBus**, **Megabus**, and **RedCoach**, all of which have extensive service on the route as well.



A Greyhound bus on the Chicago – Indianapolis route is at Lafayette, IN, in September 2021, a service with newly added stops in nearby Rensselaer and Valparaiso, IN.

Starting in 2023, when **Brightline Florida** begins carrying passengers between downtown Miami and Orlando International Airport, these bus lines could have a formidable new competitor in their midst, although Brightline fares will be much higher.

Capitalizing on the dramatic increase in travel demand to warm-weather spots throughout the pandemic, in May FlixBus opened [a line connecting Key West](#) to Miami International Airport including stops in Marathon, Islamorada, and Homestead, FL. As of early this year, a pair of roundtrips are operated daily, except Tuesday, in each direction. One daily schedule between Miami and Key West is similar to that of Greyhound.

Several historical efforts centering around Greyhound are taking place in the South. The rehabilitation of Jackson, MS's former Greyhound Station has brought [much praise to](#) Jackson County, which oversaw the

Art Moderne depot's rehab. Birmingham, AL's former Greyhound Station, last used by the carrier in 2017, has been meticulously restored and may soon find a new tenant. Montgomery, AL's Freedom Rides Museum [has restored](#) a vintage Greyhound bus (a GMC model) that was in service at the time of the Freedom Rides in 1961. The Freedom Riders of the era tested a Supreme Court ruling that segregation in interstate bus and rail travel was unconstitutional. The operational Greyhound station site in Louisville, KY, however, appears [poised for demolition](#) because of the land's real-estate potential.

MIDWEST AND CENTRAL

Much of the activity in the Midwest and North Central regions during 2021 centered around state-supported services and the robust FlixBus expansion. The latter's growth partially filled the void left by cutbacks by Megabus, which is presently limited to the Chicago – Madison, WI - Twin Cities route in these regions.

Wisconsin Coach Lines, a unit of Coach USA, assumed the operation of two former Jefferson Lines routes long provided with state financial support. The carrier also began selling seats on these routes using the megabus.com platform. [The first route connects](#) Milwaukee to La Crosse, WI, running via Baraboo and Sparta. The second links St. Paul, MN to Milwaukee, running via Eau Claire, Chippewa Falls, Wausau, Green Bay, and Sheboygan. Another service, linking the University of Wisconsin-Whitewater to Milwaukee, via Waukesha, and Brookfield, was similarly added to megabus.com. Each route consists of one daily roundtrip.

As a result of the public financial support, it now receives for the former Jefferson routes, **Megabus** modified its Chicago - Twin Cities service. Its buses, previously running via Milwaukee, now take a more southerly route via Rockford, IL and Janesville and Madison, WI. Operations are handled by Coach USA's Van Galder subsidiary, which has long had the lion's share of the Chicago – Madison market. In early 2022, Megabus's Twin Cities buses made two roundtrips daily,

Figure 4: Notable New Routes of the Midwest and Central U.S.



Friday and Sunday only, a less intensive schedule than before the pandemic.

Except for Minnesota and Wisconsin services, **Megabus** no longer has any routes to or from Chicago. This has created new opportunities for other lines. **Burlington Trailways**, for examples, continues to offer extensive service between Chicago, Des Moines, and Omaha, seemingly benefiting from the absence of Megabus/Windstar service and a return to classroom learning at college campuses along this route. **Barons Bus** and **Miller Transportation** are situated to handle a larger share of the Chicago – Cincinnati route, which has witnessed the withdrawal of Megabus as well as the elimination of Greyhound express service. All the remaining services on this route, however, involve

multi-stop trips, making travel times substantially longer than as recently as 2019. Consumer options are further limited by Amtrak trains running only tri-weekly on this route and on a schedule far removed from prime market demand hours

In July, **FlixBus** [relaunched](#) service to Columbus, OH, which it had briefly served in late 2019 and early 2020. Its previous route to the Ohio capital, suspended during the pandemic, ran from Washington, DC via Pittsburgh, PA. The new route connects the “Cap City” to Chicago and features stops in metropolitan Dayton, OH, and Indianapolis, IN. Student-oriented stops at Columbus’s Ohio State University and Lafayette, IN (home of Purdue University) were later added. Generally, the bus runs

four days per week, Thursday - Sunday westbound and Friday-Monday eastbound.

Gradually, over the course of 2021, Chicago—the largest U.S. city not served by FlixBus at the start of the year—emerged as a bona-fide FlixBus hub. The company also debuted service from Chicago to Milwaukee, WI, in July,



A Burlington Trailways coach from Moline, IL is unloading in Indianapolis, IN in August 2021

and the following month, it started running [between Chicago and Minneapolis](#), by way of Hudson, Eau Claire, Madison, and Janesville, WI. The Twin Cities service was later expanded to incorporate trips via Milwaukee, Waukesha, and Wisconsin Dells, WI. Minneapolis-bound buses generally operate four times weekly, Friday - Monday westbound and Thursday - Sunday eastbound. In August, FlixBus [launched a route](#) from Chicago to Ann Arbor and Detroit, filling a void left by the loss of Megabus service. A single roundtrip runs four times weekly, Friday – Monday, and now includes a Kalamazoo, MI stop.

In early 2021, **Greyhound** began operating one of its Kansas City - St Louis, MO buses via Jefferson City, which also makes stops in Warrensburg, Sedalia, Columbia, Fulton, and Wentzville, MO. The carrier continues to operate on a more direct (and faster) route via Columbia, a prominent university community, skipping Jefferson City and several other intermediate points.

Michigan Flyer, a pilot program between the Regional Transit Authority of Southeast Michigan and Ann Arbor’s regional transportation agency, [relaunched](#) service between East Lansing, Brighton, Ann Arbor and Detroit Metro Airport in April. The new schedule encompasses 12 roundtrips daily, seven days a week. [Michigan Flyer](#)

differs from most other transit-oriented services by requiring that passengers make reservations online or pay with a credit card on the bus, with no cash accepted (for the airport trips). Also in Michigan, **Indian Trails** continues to offer extensive connecting service with Amtrak trains at Kalamazoo and other points.

In addition, public agencies reinstated the cleverly named [D2A² service](#) between downtown Detroit and Ann Arbor in October, which, like the East Lansing service, is operated by Indian Trails.

At Minneapolis-St. Paul International Airport (MSP), **Landline** expanded its offerings with Sun Country Airlines through [the rollout of Landline Select](#) in March. Landline Select features [door-to-door service](#) that involves sedans or SUVs that can hold up to four passengers. This service complements the carrier’s more traditional offerings by using full-sized coaches running between MSP and Duluth, Mankato, Rochester, and Brainerd, MN, as well as La Crosse and Eau Claire, WI.

Yet another service option, *Landline Express*, is available between St. Cloud Airport and MSP using vans that have space for nine. More newsworthy Landline initiatives involving flight connections at Denver are described in the Mountain States section.

Minneapolis-based **Jefferson Lines** has been named the North Star State’s Gold Best Transportation Company by the Star Tribune’s 2021 Minnesota’s Best contest. President and CEO, [Steve Woelfel](#), noted: “Following a year of unprecedented challenges faced by our industry, we are incredibly heartened to have this response from our passengers and hometown state.” Jefferson is part of a national network of bus lines with interline agreements that connect points on its 14-state network to thousands of destinations across the country.

TEXAS

Among the most notable developments from 2021 in the Texas and South-Central regions were **RedCoach’s** heavily publicized launch of premium service and the heavy traffic from the Texas/Mexico border region throughout much of the year.

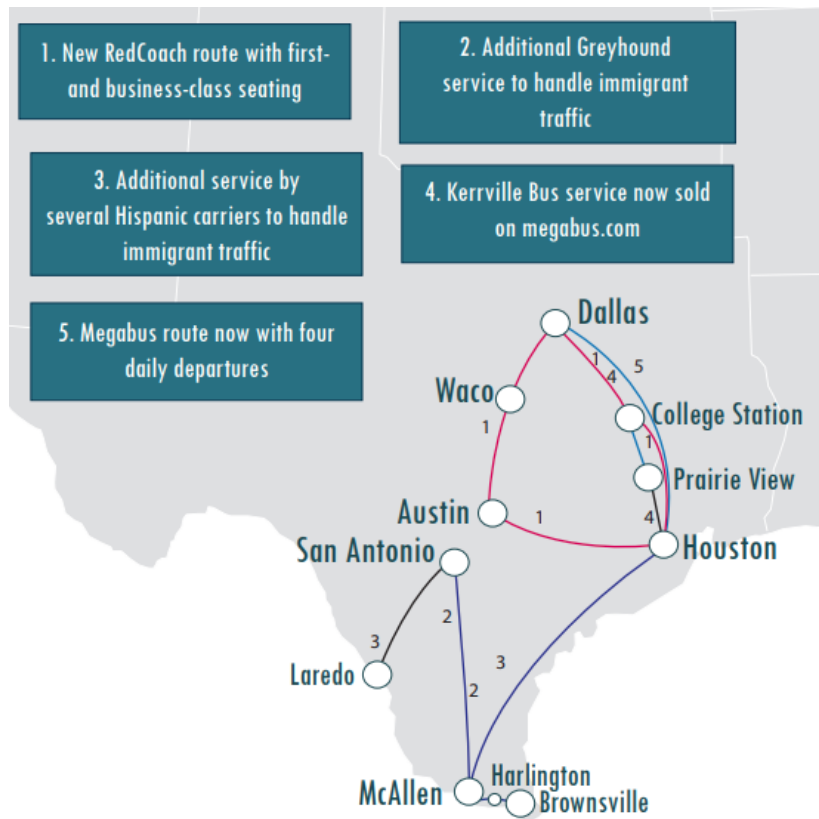
On October 15th, Florida-based **RedCoach** added first- and business-class service in the Texas Triangle, linking Austin, Dallas, and Houston, with en-route stops in Waco and College Station. RedCoach’s first-class coaches have just 27 seats, and its business-class coaches have 38, giving customers more space than the 50+ seats offered by many conventional services. Its custom seating offers “additional comfort with spacious legroom and bed-like seats that recline up to 140 degrees” (i.e., 50 degrees from a vertical position). Complementary snacks are also provided onboard. Buses operate from a curbside location next to the Hutchison Convention Center in downtown Dallas. RedCoach continues to also have a sizeable Florida operation.

Demand for bus travel was strong throughout the year due to the [nearly continuous reports](#) that emerged last summer that buses were leaving the U.S./Mexico border packed with immigrants. Reminiscent of 2019, Greyhound (partially through its Valley Transit affiliate) added service on several routes, including the routes from Brownsville and McAllen, TX to both San Antonio and Houston. Greyhound, **Tornado Bus**, **El Expreso**, and **Autobuses Americanos** “ramped up” their service to meet the urgent needs of those needing transportation, although Greyhound’s request



Passengers congregate at a Tornado Bus Bay at Brownsville, TX in August 2021—a location less than a mile from the U.S./Mexico border.

Figure 5: Notable New Routes of the Texas



for federal aid to handle the traffic more effectively amid concerns over the spread of the coronavirus fell on deaf ears.

Nearly half the travelers were reportedly in family groups. Catholic Charities has been particularly active in buying tickets for travelers in McAllen. Last autumn, we released [this seven-minute podcast](#) that describes the high-quality stations shared by bus lines, including **Greyhound**, **Tornado Bus**, and **El Expreso**, in Brownsville and McAllen, both of which have airport-style ticket counters and spacious, high-ceilinged waiting rooms. It also describes the rather spartan station in **Harlingen, TX** that is slated to be replaced with a much larger station. Greyhound also has routes to central Texas from **Laredo**, another major gateway, which is dominated by Hispanic-oriented bus lines.

Vonlane is back running first-class buses on its entire Texas Triangle service as well as its newer Dallas –

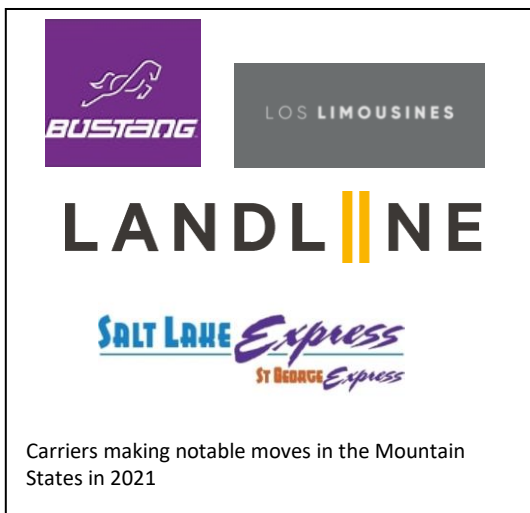


A RedCoach business-class bus for Austin awaits its evening departure from Dallas, TX on January 10, 2022

Oklahoma City route. Coach USA’s **Kerrville Bus** added service during weekends and college breaks between Dallas and Texas A&M, Prairie View A&M University, Texas State, and the University of Texas – Austin, as well as Houston on the megabus.com platform. The proposed high-speed railroad between the Dallas area and Houston (Texas Central), meanwhile, remains mired in local opposition.

MOUNTAIN STATES

The big stories in the Mountain region in 2021 were new intrastate services in Utah, the continuing expansion of Colorado’s Bustang network, and new air/bus connecting services at Denver’s international airport.



Bustang, the branded intercity bus route funded by Colorado transportation department, continues to

expand, having [launched a new](#) “Bustang Outrider” route between Grand Junction’s airport and Telluride in September. The schedule is designed to support local passengers leaving Grand Junction and seeking to return home in the same day. The new schedule includes stops at Montrose and Ouray, places also served by Bustang’s Grand Junction – Durango buses. Bustang Outrider routes generally serve more outlying destinations than the core Bustang routes, which primarily emanate from Denver Union Station, the carrier’s principal hub. Another prominent Bustang move was the [increase in frequency of its West Line](#), linking Denver to Grand Junction. This additional daily round trip enhances service at a variety of stops, including the Vail ski resort. **Greyhound** discontinued its Denver – Craig, CO service but has interline ticketing to Craig on greyhound.com by way of Bustang connectivity.

Hispanic-oriented coach operator **Los Angeles – El Paso Limousine**, which now markets itself as “Los Limousine”, has expanded its El Paso – Albuquerque – Denver service. The carrier continues its longstanding service from El Paso to Phoenix, with continuing service to Las Vegas, NV, and connection service to southern California. It has its own station in El Paso, equipped with a spacious waiting room and covered bus bays, only a few blocks from Greyhound and Tornado Bus stations, which too have large waiting rooms and staffed ticket counters.

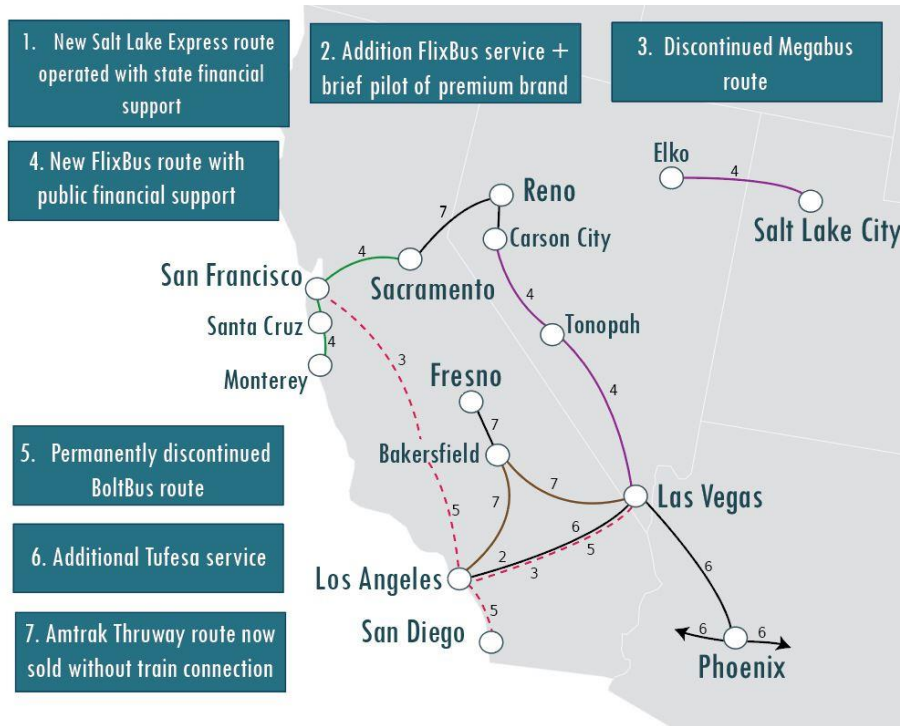
Landline, a carrier specializing in ground-air connections that was described in the Midwest section, forged a partnership with **United Airlines** to allow through-ticketing at Denver International Airport (DIA). The service includes [four daily buses](#) in each direction from DIA to the regional airport in Fort Collins, CO, and a daily roundtrip from Breckenridge, CO. Like Landline’s Sun Country Airlines partnership at the Minneapolis-St. Paul airport, customers can search for and book tickets that involve connections between Landline coaches and United flights on the airline’s website and other airline-ticketing platforms.

An important aspect of the Landline/United partnership is protected flight connections, so if a bus or flight is late, resulting in a missed connection, the passenger will be accommodated in the same way as those missing

flight connections. Passengers board coaches leaving DIA from a gate behind (air-side) security, much like those catching other flights, whereas those arriving at DIA are dropped off on the ground-side and must pass

that run twice daily. The first extends from Vernal to Salt Lake City with stops in Roosevelt, Duchesne, Heber City, and Park City, while the latter links Blanding to the capital city via Monticello, Moab, Green River, and Price.

Figure 8: Notable New Routes of the Southwest



FlixBus [relaunched its southwestern corridor](#) service connecting El Paso with Los Angeles, CA via Phoenix, AZ. However, the pattern of stops has changed to include East El Paso, the University of Arizona in Tucson, and the University of California - Riverside.

THE SOUTHWEST

In **Arizona, California, and Nevada**, the gap left by the shutdown of BoltBus and the gradual withdrawal of Megabus has been partially filled by FlixBus and Hispanic lines. By the end of the calendar year, Megabus had suspended its operations on the Sacramento - San Francisco and Los Angeles - Las Vegas routes, leaving it completely absent from all points west of Texas. At least for now, Megabus appears intent on focusing on the eastern and central parts of the country.

through security.

New routes and partnerships have put **Salt Lake Express** on a rapid growth trajectory, giving the Utah based carrier a network much larger than before the pandemic. Abetted by rapid population growth in cities along its routes, accelerated by the pandemic, the company [beginning a daily](#) Jackson, WY - Salt Lake City service, with a stop in Swan Valley, ID, in July. This service involves a timed transfer at Idaho Falls, ID, one of its principal connecting points. Passengers can connect to buses bound for both Salt Lake City's downtown and its international airport. Reservations and ticketing are available on the carrier's website and, more recently, on [flixbus.com](#) because of the new partnership we discuss in the Southwest section.

Salt Lake Express also added, in cooperation with the state of Utah, a [pair of new route Utah](#) in November

Vegas routes, leaving it completely absent from all points west of Texas. At least for now, Megabus appears intent on focusing on the eastern and central parts of the country.

Greyhound, FlixBus, and various Hispanic operators, particularly **Tufesa**, are now dominant on certain major routes, including Los Angeles – Las Vegas, NV, and Los Angeles - Phoenix, AZ. Fewer smaller non-Hispanic-oriented carriers, however, operate in this region than just a few years ago. Customer choice is particularly limited on the Los Angeles – San Francisco route. In sharp contrast to the New York – Washington corridor, in which we identified 15 operators in late 2021, just two, FlixBus and Greyhound, sell tickets on major booking sites between California's largest cities. The distance and topography of this route makes it difficult for coach markets, even though continued delay and

controversy will likely keep the high-speed rail competition at bay for another decade

On the Los Angeles – Las Vegas route, choices are also less extensive than a few years ago due to the recent absence of BoltBus, LuxBus, and Megabus. However, Tufesa has grown to offer four trips in each direction on busy days. The Hispanic-oriented operator also offers a wider array of services between Los Angeles and California’s Central Valley than a few years ago, as well as more service from Phoenix, which is a hub. Transborder operators in this region appear to have an edge over those elsewhere. Delays facing buses crossing the U.S.-Mexico border in southern Arizona, for example, have reportedly been far less severe than in southern Texas.

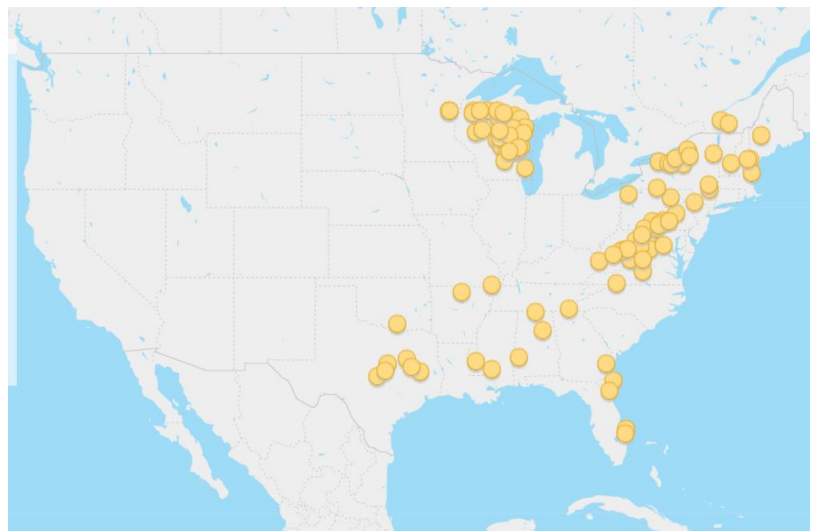
In late May and early June, FlixBus tested a premium service on the Los Angeles to Las Vegas route marketed as “FlixPlus” that features extra legroom and complimentary snack and beverage service served by an attendant. Priced at \$59.99, the service allowed customers to choose among two stops on each end, Los Angeles Union Station and Hollywood in Southern California and the Tropicana casino and Fashion Show Mall in Las Vegas. This service partially filled a void left by the shutdown of LuxBus, which was long a major premium-service category on this route. It is unclear if FlixPlus will resume this service. In April, FlixBus began having its conventional buses on the Los Angeles – Las Vegas route stop at Palmdale, CA.

A daily Salt Lake Express service connecting Reno to central Las Vegas and the gaming center’s international airport is being offered in collaboration with Nevada’s transportation department. Buses stop in Sparks, Tonopah, Beatty, Pahrump, and several other destinations. Those using this intrastate service, established in May, can buy tickets either on the carrier’s website or at flixbus.com. The latter option was made possible by a FlixBus partnership forged in May that prompted FlixBus to add a new Los Angeles – Las Vegas trip to its schedule, facilitating connections from

southern California. The Reno – Las Vegas service fills a prominent gap in the national intercity bus network. Several Nevada-based carriers have taken off—and then dropped—service over the past decade, including the now-defunct Silver State Trailways.

Amtrak began selling tickets for passengers on many of its Thruway buses in California who are not making bus-train connections. Amtrak.com’s “Bus-only” ticketing capability gives the railroad added marketing flexibility and creates new opportunities for it to concurrently offer bus and train service on. Bus-only ticketing was made possible by state legislation passed in 2019. Years ago, major bus lines fought Amtrak over selling bus-only tickets due to concerns of facing subsidized competition.

Figure 7: Cities served by Megabus and megabus.com



The map of stops on megabus.com from February 11, 2022, shows its extensive East and South network and its withdrawal from the West.

The California Amtrak Thruway bus network is the most extensive in the nation and is largely the result of California Department of Transportation (Caltrans).

THE PACIFIC NORTHWEST

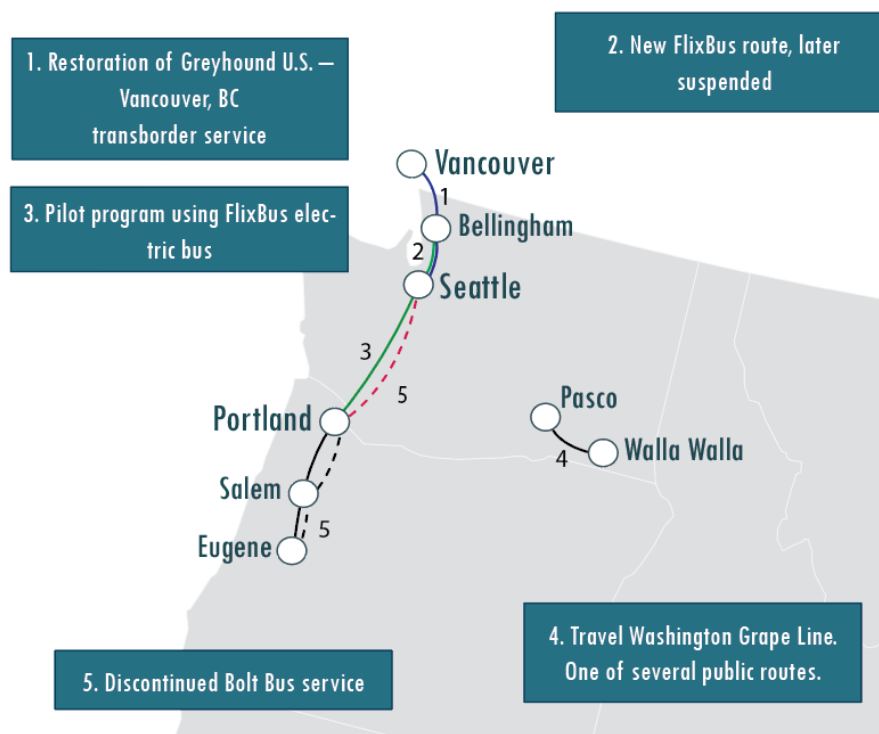
BoltBus had been the dominant player on the Eugene (OR) - Portland- Seattle route since 2013. Its demise dramatically altered the competitive landscape in this busy corridor. BoltBus’s dominance had been abetted by the absence of both Megabus, which has never

served this region, and ethnically oriented bus lines, which tend not to operate north of California, as well as capacity constraints on Amtrak services. FlixBus started their Portland – Seattle service in 2019 and expanded this corridor north of Seattle last year.

Even so, passengers using major booking websites will find few, if any, bus lines except FlixBus and Greyhound offering service between Oregon and Washington’s largest cities. Competition from Amtrak stiffened in November, when the passenger railroad resumed its use

In the bus market, however, expanded service north of Seattle was a hallmark of late 2021. **Greyhound Lines resumed transborder service** from Seattle to Vancouver, BC on September 8, 2021. The national line’s service to this Canadian city includes a through bus from Los Angeles, making it one of the longest routes in its system. In May, FlixBus **extended its Portland – Seattle route** to Bellingham, WA, with buses running Fridays and Sundays, and making stops at Everett and Bellingham’s Western Washington University campus. The service was suspended in early 2022, most likely due to the Omicron outbreak.

Figure 9: Notable New Routes of the Pacific Northwest.



FlixBus, along with operating partner MTR Western, **ran a pilot involving battery-electric buses** connecting Seattle and Eugene in November. The pilot was made possible by a state-government grant application the company submitted to help shoulder the cost of procurement and its accompanying infrastructure. Although electric buses may take a few more years to become more cost-effective on intercity routes, the pilot showed the technology is rapidly improving.

The state of Washington, like Oregon, continues to boast one of the most extensive networks of branded state-supported services in the country. Its **Travel**

of the Port Defiance Bypass route for the first time since its deadly derailment in 2017. Its travel times between Portland and Seattle dropped by around 10 minutes in the process, which was somewhat less than some anticipated, but the bypass route allows for greater reliability and could allow for more time reductions in the future. Amtrak’s renewed strength will pose challenges to bus lines but is heavily dependent on state government participation. As indicated earlier, Amtrak service to Canada (Vancouver, BC in this corridor) has not yet resumed.

Washington service includes the aptly named **Grape Line**, which runs between Walla Walla and Pasco and connects with other bus lines and Amtrak.

The **Dungeness Line** operates on the Olympic Peninsula, linking Port Angeles, Port Townsend, Seattle, and Sea-Tac International Airport, which has connections to Greyhound, Amtrak, and Victoria, BC-bound ferries. The **Apple Line** follows a 160-mile route through Omak, Ellensburg, and Wenatchee, offering connections to Amtrak and other bus lines, while the **Gold Line** runs twice daily between Kettle Falls and Spokane, with a stop at Spokane’s international airport. All **have been funded through 2022**, with the Apple Line through 2024.

The intercity bus industry's physical presence of service in Portland diminished with the 2019 closure of the 1980s-vintage modern Greyhound Terminal. This coincided with an era of some retrenchment of service, and Greyhound now splits its Portland service between a ticketing location and a curbside bus stop, both within a few blocks of the now-abandoned terminal, as well as Portland Union (Amtrak) Station. The shuttered terminal is being used to serve the homeless. A significant homeless encampment, including temporary mini-houses, has emerged near bus-loading areas.

SUMMARY & PROGNOSTICATIONS

High-profile service rollouts and new partnerships forged point to continuing innovation and entrepreneurship in the U.S. intercity bus industry--despite the hardship brought by the pandemic. The industry continues to face customer concerns about less-than-pleasing travel experiences, exacerbated by chronic driver and mechanic shortages, unruly passengers unwilling to wear masks, and aging terminals and equipment. Despite these challenges, the industry appears destined for a continued recovery. The demand for bus travel is gathering momentum, even as the commuter, tour, and charter sectors lag. It remains unclear, though, whether traffic several years from now will be above, below, or roughly equal to pre-pandemic levels.

We make several prognostications:

Prediction 1. Passenger traffic on intercity buses will only slightly lag that predicted for Amtrak. We expect bus traffic will reach 80% of pre-pandemic levels in 2023, spurred by

the recent surge in gasoline costs. Many intercity bus services outside the Northeastern states tend to serve a similar market segment as Amtrak, with traffic dominated by travelers on personal (non-business) trips. McKinsey & Co. [forecasts](#) that "non-business" traffic on the passenger railroad will sharply rebound. The most likely scenario they predict is for traffic to be 78% of pre-pandemic levels in 2022 and then 90% and 105% in 2023 and 2024, respectively. Of course, the recovery for bus travel may be slower, due in part to rising car ownership and usage, the demographic segments it serves, and a reduction in schedule options on some routes. Even so, based on our discussions with industry officials, we predict:



A battery powered FlixBus coach at a charging station appearing on [flixbus.com's webpage](https://www.flixbus.com), accessed on February 23, 2022

- *Traffic during the busy summer months of 2022 will hit 75% of pre-pandemic levels, close to the 78% [McKinsey estimate for Amtrak](#) for calendar year 2022. Traffic growth will be stimulated by the recent sharp rise in gasoline costs now facing motorists.*
- *Bus traffic during the calendar year 2023 will reach 80% of pre-pandemic levels, which, while below the 90% forecasted for Amtrak, is quite favorable compared to current levels. We expect traffic to reach 85 - 90% of pre-pandemic levels in 2024.*

- *Forecasting the recovery of the commuter- and tour- bus segments will require consideration of many unknowable factors. As such, we refrain from making any prediction for those sectors.*

Prediction 2. Emerging business and first-class services will continue to be bright spots for a struggling industry. Services debuting in 2021 by Landline, RedCoach, ROX, and The Jet indicate that travelers are ready for specialized services giving them a more enhanced travel experience than is available on conventional buses or commercial flights. Most premium services operating prior to the pandemic

are back on the roads, and more new offerings seem destined to emerge by year's end. At present, however, there are no regular premium services in California, the Midwest, the Pacific Northwest or on the Boston – New York route, suggesting ample room for expansion.

Prediction 3. FlixBus will move to more closely integrate its expanding U.S. network with that of its Greyhound unit.

We expect FlixBus and Greyhound to remain separate entities for the foreseeable future, despite now having a common owner (FlixBus). Each will continue to have a distinct transportation role, separate ticketing platforms, and interline partners. It nonetheless appears probable that FlixBus will take steps to leverage Greyhound's vast network to provide the customers of both lines with enhanced schedule options. Such alignment could involve coordinating schedules and stop locations on busy corridors to reduce overlap, shorten connecting times, and help reaccommodate passengers who miss their connections. To boost frequency and facilitate transfers, some buses could begin making stops at both the Greyhound station and the FlixBus stop.

Over the longer term, FlixBus will be confronted with strategic decisions about whether to use the Greyhound acquisition to boost specific market segments or work toward more holistic industry enhancement. This will depend on its program for capital investment – whether it uses its capital to bolster Greyhound's fleet and facilities or directs it elsewhere. These decisions may hinge on how contractual arrangements for the operation and maintenance of FlixBus routes evolve.

Prediction 4. More services coordinated between Amtrak and intercity bus lines will emerge.

The Amtrak Thruway bus system is positioned for dramatic expansion as federal and state agencies work to enhance the country's rail-passenger network. Intercity bus service is a cost-effective and flexible tool that can make the country's rail system more versatile and attractive. It can be used to build

momentum for corridor enhancement while rail projects that take years to complete are underway. In this regard, more states will likely be given latitude, as has occurred in California, to market bus service on the Amtrak platform, even for passengers who are not making bus or train connections. Some of the corridors identified for new Amtrak service will likely start with modest schedule frequency to not dramatically alter the modal split of passenger trips.

Prediction 5. Station improvements and congestion relief efforts will be spurred by the Bipartisan Infrastructure Bill and will help improve the image of intercity bus travel, though the benefits may not be realized until 2023 or later.

The enormous size and scope of the Bill are poised to bring benefits to the sector, particularly through improvements to intermodal stations shared by bus and train lines; an accelerated push for tolling on expressways rebuilt with federal funds; and projects to relieve choke points on the urban highway. Another likely result of this legislation is accelerated rollout of electric buses.

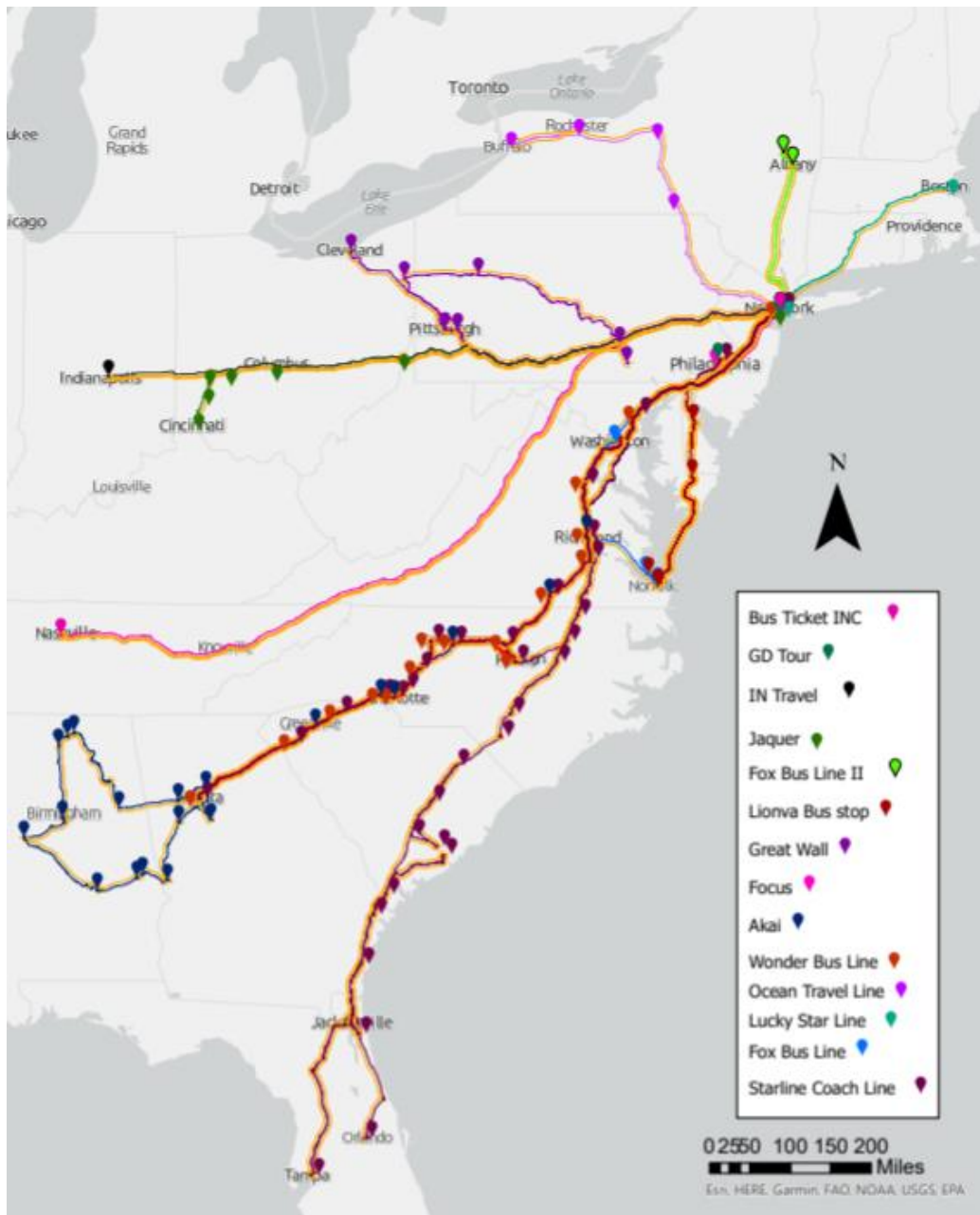
Prediction 5. The industry's reorganization and new technological adoptions, already gathering momentum before the pandemic, will accelerate because of two years of public health distress and consequent restrictions.

To an outside observer, the industry may appear as it was before the pandemic, but in fact many operations are running less frequently, sometimes less than daily. In addition, an increasing share of routes are operated through contractual agreements in which the ticket seller is not the operator. The positive and negative implications of this are not yet fully apparent. As bus lines struggle to adopt "the new normal", more disruption and strategic shifting seems inevitable, including retrenchment by some established lines and re-branding. At the same time, the push for the "decarbonization" of travel could swing public policies in the industry's favor. ■

APPENDIX: CARRIERS OPERATING FROM THE VICINITY OF NEW YORK'S CANAL STREET (CHINATOWN), JANUARY 2022

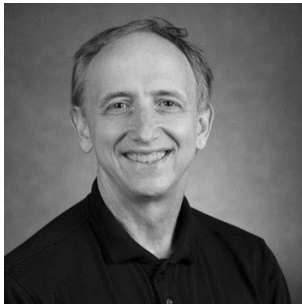
An extensive network of bus lines once again operates from the vicinity of Canal Street within or near New York's Chinatown neighborhood, providing vigorous competition to carriers operating from Midtown Manhattan. The map shows carriers operating from this neighborhood that sell their tickets on gotobus.com, ilikebus.com, or busbuster.com. Some market their services under different names on different websites. Please check the Chaddick Institute website in April 2022 for additional analysis of this largely unpublicized sector.

Figure 10: Carriers and routes from the vicinity of Canal Street (Chinatown) in New York



Map by Borja Gonzalez Morgado, Chaddick Institute

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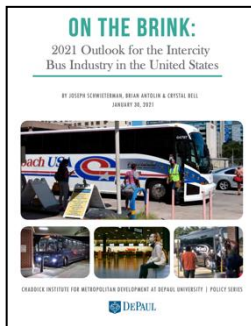
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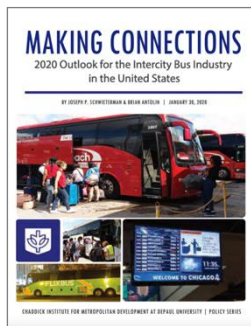
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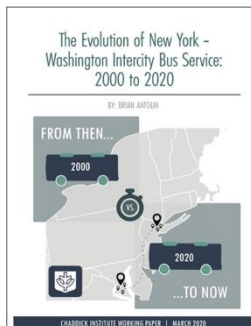
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