

NEW DIRECTIONS

2019 Outlook for the Intercity Bus Industry in the United States

BY BRIAN ANTOLIN, JOSEPH P. SCHWIETERMAN & MATTHEW JACQUES | FEBRUARY 5, 2019



Includes 2018
Year in Review





THE STUDY TEAM

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The intercity bus industry rolled into 2019 with a bevy of new premium-service offerings, more dynamic scheduling to meet fluctuations in demand, and new pickup and drop-off locations that bring bus travel closer to the customer. Several major developments—Flixbus’ launch in the Southwest, Greyhound’s rollout of e-ticketing, and ambitious moves by smaller carriers—have quickened the pace of competition. **Part I** of this report explores industry trends, while **Part II** reviews notable service additions and subtractions in 2018. **Part III** looks to the future.

I. SHORT-TERM OUTLOOK FOR THE INTERCITY BUS INDUSTRY

Six trends herald the evident changes underway in scheduled intercity bus travel.

TREND 1:

A strong economy helped strengthen demand for scheduled coach travel in major corridors, but low fuel prices nationwide remain a mixed blessing. Uncertainty over demand contributed to Stagecoach’s decision to sell its Megabus unit to a venture capital firm.

A robust national economy has helped stimulate demand, particularly in the Northeast, which, along with the Southwest, is one of the country’s hottest intercity bus markets. The three biggest players—BoltBus, Greyhound, and Megabus—all expanded in the region, and many niche operators also grew. Six bus lines introduced or expanded business- or first-class service in the Northeast over the course of 2018.

The sector is also becoming more effective at simplifying the ticketing and boarding process. Megabus continues to offer reserved seating nationwide, available at a modest fee. In September, Greyhound rolled out e-ticketing nationwide through its app, which has made the use of electronic tickets on smartphones and other personal devices much more prevalent. Additionally, funding shortfalls for Amtrak and

political and institutional barriers are preventing partnerships between states and Amtrak from being expanded. This has made intercity bus service of greater interest to state governments, which, as noted below, continue to invest in promotional strategies and services.

The rise in oil prices through July, pushing rates to \$71/barrel (for West Texas Intermediate crude) generated optimism that high gasoline prices would stimulate demand nationwide through the year’s end. The reason: high fuel prices tend to hurt driving and air travel much more than bus travel, which burns far less fuel per passenger-mile. However, the year-end collapse to around \$51/barrel left gasoline prices barely changed from a year before. Motorists are now paying as little as \$2/gallon to fill up in some parts of the country.

A return of cheap gas has put a drag on demand, particularly outside the Northeast, where demand appears largely impervious to gasoline prices and congestion issues and tolls hinder auto travel.¹ Major bus lines cut fares to avoid losing traffic to auto and airline competition, hurting their financial performance.

INTERESTED IN A PARTICULAR REGION?

Please refer to our geographic sections:

- New England, page 5
- Mid-Atlantic, page 7
- Midwest, page 12
- Southeast, page 13
- Central, Mountain & Pacific Northwest, 14
- California & Southwest, page 16

PLUS, CHECK OUT OUR SPECIAL SECTION ON PREMIUM & FIRST CLASS SERVICES

See page 20 for a map and summary of these operators or visit our [Interactive Map](#).

FirstGroup [reported a moderate reduction](#) in earnings for **Greyhound** during the 2018 fiscal year, which ended in March. Low fuel prices for most of the year kept fares low, limiting [revenue growth to 1.7%](#) although Greyhound Express' "like for like" revenues were up an impressive 7.7%. In the [six months that followed](#), ending in September, performance inched downward: North American revenues as a whole dropped 1.6%. Greyhound Express' "like for like" revenues again rose, by 2.7%, an amount roughly equal to inflation, but revenues on other Greyhound routes fell by 0.7%. The company reports: "Short haul journeys continue to outperform long haul, where there is more intense competition from the ultra-low cost airlines".² Greyhound's revenues were also affected by its complete withdrawal [from the western provinces of Canada](#), easily the biggest bus-travel story last year in this neighboring country.

Stagecoach, owner of **megabus.com** and **Coach USA**, [reported a 3.2% drop](#) in its North American revenues, which include its charter and school bus service, for the six months between April and October 2018. This included a 1.7% drop in "like for like" revenue for megabus.com (Megabus), and revenues for other scheduled service on the continent dropped by an equal amount. As noted below, some of the revenue decline was likely attributable to competition from new bus lines, particularly in the Northeast and Southwest. Although rising support from government authorities offset part of the decline, the results point to the difficulties posed by lower fuel prices for major bus lines.

Disappointing revenues appeared to be the major reason Stagecoach [agreed to sell](#) all of its North American operations, including its megabus.com unit in December for \$271 million to Variant, a California private equity firm. As noted in previous *Outlook* reports, Stagecoach has been a major player in the long-distance bus market since rolling out the megabus.com brand here in 2006.

TREND 2:

Technology platforms are giving smaller charter companies and regional players a greater ability to compete with well-established operators in some of the country's most heavily traveled corridors.

Smaller intercity bus lines are more aggressively using dynamic pricing and flexible scheduling, allowing them to capture market share in major markets dominated by much larger carriers. In some instances, smaller carriers offer service only a few days a week, and sometimes only during peak seasons. Several are using "crowdsourcing" techniques, a term derived from the propensity to draw from the "wisdom of the crowd" to determine where and when to add service. This often involves experimentation with "pop up" service (i.e., services offered only for brief intervals) to gain insight into customer demand.

We have described in previous reports the exponential growth of **Rally** and **Skeddadle**, made possible by crowdsourcing innovations allowing travelers to, in effect, schedule a charter bus that is advertised to wide audiences to help fill seats.³ These services have become particularly popular for special events such as concerts, public demonstrations, and rallies.

Providers of *regularly scheduled* service are now borrowing a page from the same playbook. In the Northeast, **OurBus** has added routes in which service is available only on days of the week where demand is strongest, and regularly changes its schedule in response to real-time data. **Flixbus** is doing this in the Southwest, a topic discussed in Section 3 below. Such strategy is a dramatic change from days when carriers printed schedules in the *Russell's Motor Coach Guide* and were remiss to change them.

TREND 3:

Scheduled bus operators are increasingly emphasizing service linking *metropolitan regions* rather than just city centers. A related trend is added service to/from airports and train stations, with the goal of providing passengers greater connecting opportunities.

For many years, city-to-city express carriers such as BoltBus, GoBuses, and Megabus focused primarily on linking densely populated city centers. As competition intensifies on these routes, however, emphasis is rapidly shifting toward networks offering an entire spectrum of stops within large metropolitan regions, including urban neighborhoods, residential suburbs, and shopping malls. Carriers are turning away from nonstop service between cities in favor of multi-stop services. This strategy, of course, is not without risk, as additional stops add to travel times.

Flixbus offers the most dramatic example of this, having rolled out service to an array of locations in Arizona, California, and Nevada (see Section 3), with some schedules having more than a dozen stops. **Greyhound's** expanding service from Upper Manhattan's George Washington Bridge station⁴ and **OurBus'** Florida and Mid-Atlantic expansions also allow customers to choose among a variety of stops.



Trailways of New York launched Line, a premium service operated to the Catskills last summer season and, after a hiatus in autumn, relaunched it this month.

Carriers are also simultaneously placing greater emphasis on air and rail connections. Flixbus has made Sky Harbor Airport its primary stop in Phoenix, affording its customer not only flight connections, but ground transportation options as well. **Megabus** began selling certain Coach USA airport shuttle services on its website last year, while **RedCoach** in Florida is building an entire network emphasizing trips to airports. **Trailways of New York** has strengthened its partnership with Amtrak and is even selling bus-train transfers on routes well served by its buses.

TREND 4:

New services operated from locations on or near college campuses, including “pop-up” services operating only during college breaks, remain a major area of growth.

Although college students have long been a mainstay for the intercity bus industry, carriers are increasingly re-orienting their networks to make university campuses focal points of operations. **Megabus** aggressively employed this strategy last year, adding service to Charlottesville, VA, and expanding it to Annapolis, MD, Newark, DE, and Gainesville, FL—all with stops near major campuses. **OurBus** and **Red Coach** also moved sharply in this direction.

Notable Players Active in Linking Metropolitan Regions Rather than only City Centers



Notable Players Active in Stratifying Service Levels



The on-demand mobility provider **Rally** (previously known as RallyBus) made its scheduled-service debut in partnership with **Starr Tours**. By leveraging its technological capabilities and Starr’s client roster, it introduced several pop-up routes over Thanksgiving linking the Penn State University--College Station and the University of Maryland--College Park campuses to the Philadelphia and Central/Southern New Jersey areas. We expect more campus-oriented service by on-demand providers to come.

One consequence of the growing popularity of bus stops close to college campuses is the closing or gradual decline of downtown bus depots. Ithaca’s West End Bus Terminal, for example, closed last year, while the number of campus-oriented curbside services has grown sharply. In response, the municipal government proposed a \$20 fee for all intercity buses departing from on-street locations. After considerable “pushback”, [the city settled on a \\$5 fee](#). Nonetheless, if such fees spread it could be a drag on profitability.⁵ Various types of curbsides fees are already in place in New York, Philadelphia, and Washington.

TREND 5:
State-supported services – one of the primary growth drivers in the industry over the past five years – are growing more sophisticated through strategic partnerships and sustained federal funding.

The Federal Transit Administration’s [“5311” program](#), which offers subsidies for service to places with populations under 50,000, is on the upswing. Funding is set to grow to \$591 million in the 2019 fiscal year, up from \$577 million in 2018. State governments have rolled out new services on more than a dozen routes with these funds and other public dollars in recent years. A variety of technical tools, including creative arrangements for states to provide “in kind” (rather than monetary) matching funds, are allowing for expansion.

The gradual expansion of Bustang in Colorado stands out in this regard, setting an example that other states will likely emulate. Several new Bustang routes added last year were made possible in part by a partnership forged with an airport shuttle operator. Greyhound is also expanding its collaborations with state government.

Nevertheless, several route cutbacks last year that are described below suggest that the passenger demand on rural routes has plateaued and in some cases is trending downward, apparently due to rideshare competition, lower fuel prices, and increased car ownership.

TREND 6:

The push to stratify service by offering both economy and premium options continues. In 2018, six carriers rolled out expanded premium offerings in the Northeast, while two others expanded them in other parts of the country.



Concord Coach Plus, featuring 2 + 1 seating, enhanced entertainment options, and onboard snacks and beverages.

The rollout of premium services, i.e. services with amenities unavailable on conventional bus lines, continues. **BestBus** and **Washington Deluxe** both introduced new premium brands in the Northeast Corridor last year, following earlier moves by **Limoliner**, **Tripper**, and **Vamoose**. On the popular weekend routes linking New York to Catskill Mountain resorts, **Catskill Carriage** and **Trailways of New York** launched seasonal higher-end brands. In New England, **Concord Coach** added a trip on its existing “Plus” brand. Please refer to page 20 for more information on these services.

II. NOTABLE NEW SERVICE

Nearly all regions of the United States received at least some new service in 2018.

NEW ENGLAND

This part of the country was a hot-bed of activity. **CoachRun** expanded significantly in the New York – Boston corridor to capture more of the tourism market, boosting its daily offerings to a pair of trips in each direction. CoachRun, part of Boston-based Sunshine Travel, carves a niche in this highly competitive route by leveraging Sunshine’s network of travel affiliates and

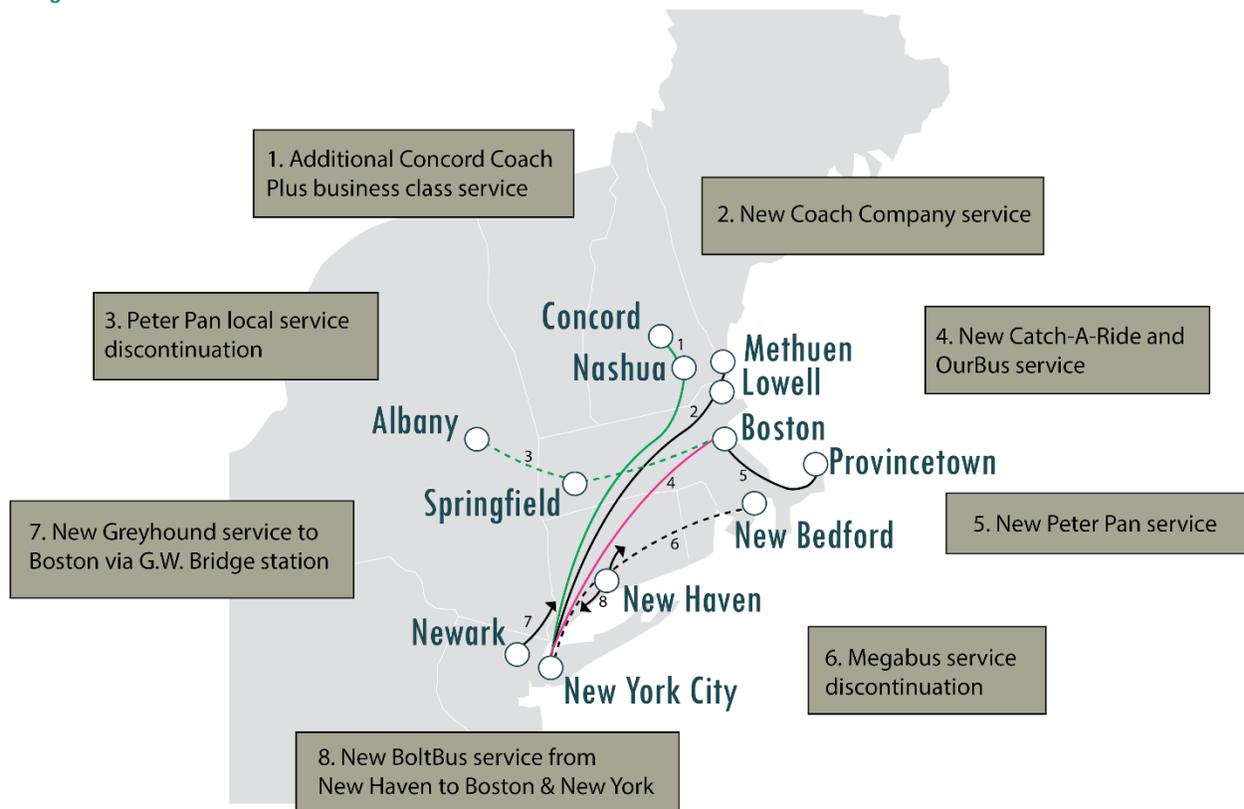
agents, who publicize its service and issue tickets to international travelers. At the route’s southern end, the company added several stops last summer, enabling customers to board in The Bronx, Chinatown, and Flushing, and at New York’s three major airports, Kennedy, LaGuardia and Newark, although service from certain places requires a Bronx transfer. At the north end, it operates from Boston’s Chinatown as well as Framingham and Quincy. As noted later in this section, CoachRun also entered the Florida and Las Vegas markets.

Catch a Ride launched its own New York and Boston service: weekly shuttles catering to those in New York’s outer boroughs who otherwise would have to travel to Manhattan to catch a bus to Massachusetts. Originally rolled out in 2017 as a holiday pop-up operation, the service consists of one trip in each direction on Fridays and Sundays, connecting Brooklyn and The Bronx with the Back Bay in Boston.

The Coach Company, a family owned transportation company in New Hampshire known for its regional charter, Boston commuter, and Foxwoods Casino services, also entered the crowded New York – metropolitan Boston market. Its twice-daily service launched in July linked Lowell and Methuen, MA to the Port Authority Bus Terminal, making it part of a movement among New England carriers to offer direct service from smaller points to Manhattan. This month, however, service ceased, and the carrier’s future plans are unclear.

Concord Coach made a similar move, adding a trip to its “Plus” brand between Concord and Nashua, NH and New York. Featuring a 2x1 seating layout, and onboard snacks and drinks, this business-class offering allows travelers to avoid the hassle of flying. The new roundtrip runs Fridays and Sundays, departing from New Hampshire in late morning with an evening return, increasing Concord’s Manhattan service to four trips each way on Fridays and Sundays (two operate to Portland, ME, and two to the

Figure 1. Notable New Routes in the Northeast



New Hampshire points).

Another premium operator, **Limoliner**, meanwhile, added service from New York to New Bedford, MA, with an outbound trip on Friday and a Sunday return. This is available during the summer months only.⁶

BoltBus established New Haven, CT as a stop on its New York – Boston route. Boltbus immediately became a New Haven powerhouse, offering up to seven trips in each direction daily.⁷ In the process, it became the first city-to-city express carrier to offer *nonstop* service between the Connecticut city and Boston. When it launched the service, it faced competition from Peter Pan, Greyhound, Megabus, and GoBuses (operating via either Providence, RI or Hartford, CT). By October, only Greyhound remained.

Peter Pan [added a route](#) linking Boston to Hyannis and Provincetown.⁸ Along with other intercity bus lines as well as Pioneer Valley

Transit, it moved operations into the renovated Union Station in Springfield, MA. In conjunction with new state-funded rail service to Hartford and New Haven, these services greatly increase the station’s importance as a connecting hub. In September, however, Peter Pan [discontinued local service](#) between Albany, NY and this Massachusetts city that had been funded through the MassDOT BusPlus program, a service that included stops in Deerfield, Troy, and other points. Earlier in the year, the carrier had trimmed its service to a single daily round trip. Peter Pan and Greyhound still operate express service in the corridor.

Megabus.com (Megabus) made targeted cutbacks, ending, for example, its New Bedford, MA - New York (via Providence and New Haven) service in July. Passenger volumes apparently dropped as a result of GoBuses launching service to downtown Providence, as well as continuing competition from Peter Pan. In September, Megabus ended its New Haven - Boston (via

Hartford) service, a move apparently stemming from the entry of BoltBus, which offered greater frequencies and generally lower prices.

MID-ATLANTIC REGION

Activity in the Mid-Atlantic region was dominated by new niche services.

BoltBus added service on the heavily traveled Philadelphia – Baltimore – Washington routes, offering up to four schedules in each direction and putting it in direct competition with Greyhound (its parent) as well as Amtrak, Megabus, and Yep Tour (a Chinatown carrier). Last year, also added DuPont Circle to select Washington – New York schedules, providing an alternative to existing BestBus and Washington Deluxe services from this D.C. neighborhood. Although schedules vary, two midweek trips and five weekend trips in each direction generally call on this location. In April, the company quietly ended service to Richmond, VA from New York and Washington. Unlike Greyhound, which operates from a downtown Richmond terminal, BoltBus had used a curbside stop at Virginia Commonwealth University.

Greyhound experimented with several “through” schedules linking both [Atlantic City and Philadelphia to Boston](#) over the summer, with each operating on Fridays and Sundays via New York. However, these direct schedules were discontinued after Labor Day, leaving only connecting service. Whether these trips will return next year remains unclear. In the fall, Greyhound launched a once-daily direct service from Newark, NJ to Boston, a five-day-a-week offering with stops at the George Washington Bridge Bus Station in upper Manhattan. (See last year’s report for a discussion of the bridge station). The carrier also expanded its presence at this station by introducing a [direct route to Albany, NY](#). Trips on this route originate in Philadelphia and include a stop in Newark. However, one of the two daily round trips on this route was eliminated in October.

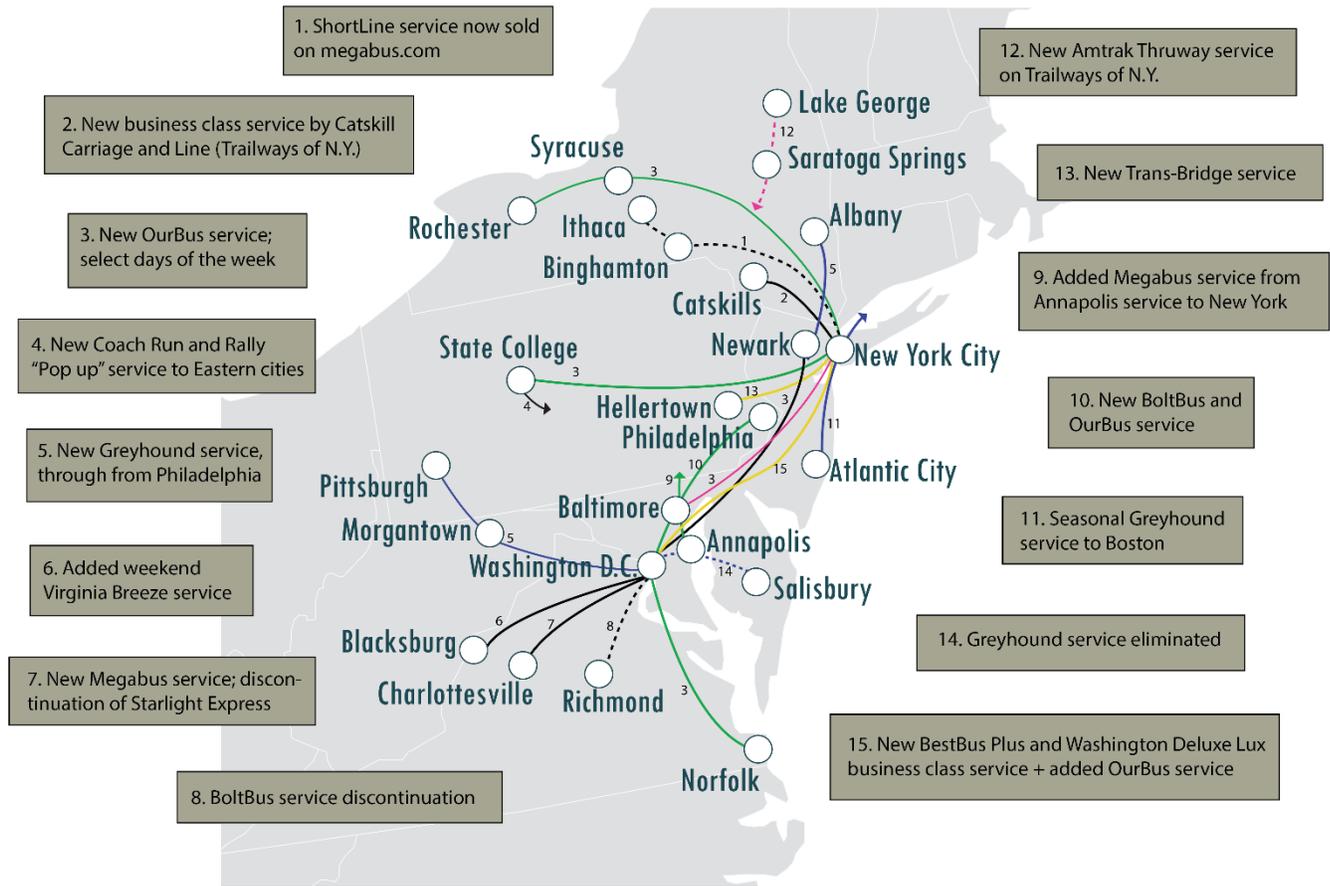
Greyhound’s longstanding [service connecting Washington with Maryland’s Eastern Shore](#) is no longer, having ended last February. This single round trip, which operated six days a week via Annapolis, served both Easton and Salisbury, MD, and was dropped in favor of a Baltimore-based schedule with a similar frequency that extends to Norfolk, VA. **Megabus.com** added to its website ticketing capability for the Ithaca – New York service provided by Shortline/Coach USA. This sister company operates the popular **Ithaca Platinum** service, which runs on an express schedule. Most non-holiday or college break period trips operate via Binghamton.

Megabus.com relaunched its Cleveland – New York route in July, a little more than one year after suspending this service, offering one daily bus in each direction from Thursday to Sunday. Unlike the earlier service, which it operated directly, the new service is operated by Coach USA affiliates Lakefront Lines and Community Coach using single deck coaches. Another difference: it uses the Port Authority Bus Terminal rather than Megabus’ curbside stop in west Manhattan, and skips the State College, PA stop the earlier service made.

In response to increased demand, megabus.com expanded its Annapolis, MD – New York service, which operates via Baltimore’s White Marsh Mall, in September. This boosts service from two to five trips in each direction on most days. Buses arrive and depart from the Truman park-and-ride lot just outside of the state capital’s downtown.

New campus-oriented megabus.com offerings also included the reinstatement of service to

Figure 2. Notable New Routes in the MidAtlantic



Newark, DE, which is once again an intermediate stop on select New York – Washington schedules. One or two buses stop daily at a park-and-ride facility near the University of Delaware campus. The carrier also added a roundtrip at the start of the new academic year between Albany and New York (both home to SUNY campuses), and another on the Washington – Pittsburgh route, which has a stop in Morgantown, WV, the home of West Virginia University, on Fridays and Sundays.

In October, megabus.com launched service between Washington and Charlottesville, VA, home of the University of Virginia. (This is the only service megabus.com launched last year that had not been previously served by the carrier or a Coach USA affiliate). The two daily schedules in each direction offer connections to New York and other cities in Virginia. This route

complements the **Virginia Breeze**, a multi-stop state-supported route launched in 2017 linking Blacksburg and Washington. Due to the popularity of this branded service, a new weekend Breeze trip was added to the schedule in November.⁹

Bieber Tourways of Pennsylvania suffered a series of high-profile disruptions that resulted in its network shrinking by more than half during 2018. The carrier annulled its direct route between York, Lancaster, Philadelphia, and New York in April. Bieber had created this consolidated service (which had previously been operated as two separate routes by now defunct Capital Trailways) to create operational synergies.¹⁰ In August, however, Bieber was evicted from the Port Authority Bus Terminal due to a payment dispute related to gate and terminal-access fees. This created an

opportunity for **Trans-Bridge Lines**, another intercity operator serving this part of Pennsylvania, to assume operation of Bieber's Lehigh Valley services to/from the terminal. Trans-Bridge commenced a limited schedule serving Hellertown (a community just south of Bethlehem) and its Wescosville, PA park-and-ride, both in Lehigh County. Eight trips operate in each direction on weekdays, and four on weekends.

As this transition was occurring, Bieber attempted to operate from a curbside stop in Manhattan, only to be routinely fined by the New York police due its failure to obtain permission to use city bus stops. This forced the company to suspend single-seat rides to Manhattan and instead partner with New York Waterway, a trans-Hudson ferry operator, to allow transfers to and from ferries at Weehawken, NJ. This inconvenience increased travel times, thereby suppressing demand and prompting Bieber to reduce its schedule frequency. The problem was temporarily resolved in November when the City of New York approved a new curbside bus stop, one block south of the Port Authority Bus Terminal, for a trial period that has now been renewed.

Catskill Carriage, a seasonal shuttle and special-events company, [launched a service](#) to the Catskills Mountains area during Memorial Day weekend. This service, notable for having an onboard attendant and "artisanal" snacks and beverages, makes a northbound trip from Manhattan to Monticello, Livingston Manor, and Roscoe, NY on Friday evenings and a return trip on Sundays, but only during the summer season. The operation was inspired by other premium operators, such as **Hampton Jitney**, serving the New York region.

Trailways of New York made a similar move to capture leisure and investment traffic to the Catskills. This parent company of Adirondack, Pine Hill, and New York Trailways launched **Line** in July, which was aimed at a different customer than its conventional services and features an

onboard attendant and snacks and beverages. Before the trial serviced ended in September, a Friday northbound trip and a Sunday return was made between New York and various resort towns, including Hunter and Windham, NY. This month, the northbound service was reinstated.

In August 2018, Amtrak and Trailways of New York [entered into a partnership to create several new Amtrak Thruway routes](#) serving upstate New York destinations, including Ithaca and Lake George. Amtrak offers interline ticketing and connections to and from Trailways buses at Saratoga Springs and other points. Unlike some other Thruway routes, however, buses will not be rebranded in the Amtrak Thruway livery and the bus schedules do not yet appear in Amtrak timetables

Following its purchase of the **BestBus** brand, Virginia-based **DC Trails** introduced **BestBus Prime**, a new premium service, on both its routes in August. One round trip links Springfield, VA, DuPont Circle, and Washington Union Station to New York, while the other links Manassas, VA and Fairfax, VA to Manhattan, but has limited weekly frequencies, varying by season. These services boast 2 x 1 seating that is similar to Vamoose Gold and Tripper Elite and feature more legroom and entertainment options.

Washington Deluxe joined this crowded field in the New York – Washington market by rolling out Lux Bus Executive Travel in October. Lux features larger seats with extra legroom on a 2 x 1 configuration as well as enhanced onboard entertainment. It consists of round trips between DuPont Circle, Washington Union Station, and Manhattan, Thursdays through Sundays.

Starlight Express, after linking Charlottesville, VA with New York City for more than a decade, [made its final trip](#) in October in the wake of Megabus' new service to the university town from Washington. Starlight was created to fill a mobility gap and helped pioneer the delivery of premium express service with snacks and extra

legroom. However, after an ownership change, the premium service gave way to a more conventional service with a stop at Tysons, VA.

GoBuses made several changes on its New York – Washington corridor, starting with the March addition of a stop in a park-and-ride location in Mount Holly, NJ. This park-and-ride is owned by its parent, Academy Bus, which uses it for its commuter routes to and from New York. This stop makes GoBuses the first city-to-city express carrier to link southern New Jersey to the nation’s capital. The carrier later scaled back its New York – Washington service to Friday – Sunday only, although its other services to the capital region (such as its trips between New York and Manassas and Fairfax, VA) were unaffected. In October, GoBuses added a stop in Washington’s Eastern Market, a location no other intercity carrier serves. Up to four buses (which also stop at L’Enfant Plaza and Alexandria) operate to and from the market.

Coach Run and Rally, meanwhile, tested pop-up routes from State College Pennsylvania aimed at attracting Penn State University students during holiday breaks.¹¹

The Expansion of OurBus

Perhaps the biggest story in this region from 2018 was the dramatic expansion of OurBus, which uses an innovative tech platform to offer both intercity and regional services. Having progressed from its modest beginnings as a crowdsourced commuter platform, the company has become a sizeable force in scheduled intercity travel. By developing a bevy of new routes, OurBus is among only a handful of brands with a presence on both sides of the Mississippi.

OurBus differs from many other scheduled bus services in its scheduling flexibility. With a data-driven platform, its services are usually available only on the days when there is enough demand to cover costs, allowing for a stronger match between bus seats and passenger demand. The company typically enters markets after testing “pop-up” services over holiday weekends to not only assess customer interest, but also to test the viability of its partnerships with bus operators. Based on our rudimentary calculations, more than 70% of its pop-up services offered in 2018 were followed by regularly operated routes.

OurBus’s new service in the Mid-Atlantic region is described on the next page, while its growth in Florida and Texas is described later in this section.

SPOTLIGHT ON: OURBUS EXPANSION

OurBus expanded on an ambitious timetable in the Mid-Atlantic region. Please refer to pages 13 and 14 for its expansion in other parts of the country.

Revamped New York Service. In April, OurBus launched service between Syracuse and NYC, with one trip in each direction on weekends, linking the Syracuse University campus and Manhattan. Additional schedules were added during holidays and college breaks, most with an intermediate stop in Binghamton. This route was briefly extended west to Rochester and now consists of a daily service New York–Syracuse service.

Northeast Corridor Service. In April, OurBus launched



once-daily service between Philadelphia’s University City and Washington Union Stations, which evolved into an Ithaca–Washington, DC service, via Philadelphia. One roundtrip is offered Friday through Sunday, with additional trips around holidays and college breaks, operated by **Chariots for Hire**.

The company launched a standalone route between Newark, NJ and Washington DC in May. Consisting of one or two weekend-only trips in each direction with added schedules around the holidays, the service allows travelers to avoid Lincoln Tunnel traffic into NYC. The current iteration offers a daily round trip with stops in Clifton, Newark, New Brunswick and Hamilton, NJ and is operated by **Panorama Tours**.

In May, the company launched service between the Port Authority Bus Terminal and Boston’s Back Bay as a partnership with **Martz Trailways**. The one daily roundtrip had a stop in White Plains, NY. OurBus,

however, abruptly ended the service the following month, citing operational challenges.

Ourbus also added service between York and Lancaster, PA and New York in response to Bieber’s discontinuation of services in the Lancaster area in April, partnering with **Executive Coach**. It also continued rolling out stops at suburban locations on or near the New York – Washington corridor, including Tysons, VA, and Bethesda and Rockville, MD, which it added in November following “pop-up” services to test their viability. Service to these points consists of one trip in each direction on weekends. **Chariots for Hire** is the operator of record.

Similarly, the company launched service from metropolitan Baltimore to New York City in December with stops in Towson (catering to the largely untapped college market at Towson University) and White Marsh. The one daily trip in each direction is operated by **Eyre Bus**. The carrier also added Newark, DE to its New York-Washington route in August, coinciding with the start of the new University of Delaware academic year, and experimented with a stop at the Neshaminy Mall in Bensalem, PA.

Central and Western Pennsylvania Service. The company briefly offered a Pittsburgh-Washington service in December. This service, consisting of one express trip on weekends, operated by **Eyre Bus**, was withdrawn near the start of 2019.¹²

OurBus partnered with **Fullington Trailways** to offer direct service between State College, PA and New York City. This new offering complements Fullington’s existing service to the Penn State community during the academic year. Schedules operate Friday through Sunday and use Fullington’s terminal on campus and an outdoor stop at the Port Authority Bus Terminal.

Norfolk Service: A weekend service linking Washington DC and Norfolk launches in mid-January 2019, following a successful test over Thanksgiving. The route is oriented toward university campuses in Richmond, Williamsburg, and Norfolk but also has stops in Springfield and Fredericksburg, VA. The service is operated by **Gold Line**, a division of Martz.

MIDWEST REGION

The Midwest saw less activity in 2018 than in previous years.

Greyhound discontinued [the northern leg of a through schedule](#) between Chicago and Green Bay, WI in October. The Milwaukee – Green Bay segment had only one trip in each direction, but passengers could make myriad connections in Chicago and Milwaukee. Lamers Bus, Indian Trails, and Jefferson Lines continue to serve this intrastate leg. In January 2019, Greyhound added a new state-subsidized route linking Chicago to Normal and Danville, IL.

Megabus.com added to its website online ticketing capability for **Wisconsin Coach Lines** (a Coach USA affiliate) service linking Janesville and Whitewater, WI to downtown Milwaukee and Mitchell Airport. Known as the “Milwaukee-Janesville Loop,” the once-a-day route also serves Muskego and East Troy. The carrier also added **Tri-State Limo/Supersaver**, the airport shuttle operator, to its website. Its service connects South Bend, IN with Chicago’s airports, and has stops in Michigan City, IN, Crestwood, IL, and other points.

Figure 3. Notable New Routes Across the U.S.



SOUTHEAST REGION

New services within Florida dominated the news in the Southeast.

CoachRun, in addition to its Northeast expansion, entered the Sunshine State in December with a Miami – Orlando service that includes stops in the Miami Beach area, the Miami and Fort Lauderdale airports, and Kissimmee. Service consists of two daily schedules in each direction.

GoBuses expanded its Miami – Key West route in January by adding schedules linking Miami and Fort Lauderdale airports to the Keys. However, this proved to be short-lived, as all of its Florida service ended in March.

RedCoach, the premium Florida-based bus line, made college campuses its focus. In February, [it added service](#) linking Miami to Orlando’s University of Central Florida campus, with one southbound schedule on Fridays and one northbound on Sundays, each making stops that include West Palm Beach and Fort Lauderdale. In October, [RedCoach also began serving](#) Florida Gulf Coast University in Ft. Myers, with one each of Business Class and First Class service in each

direction daily. The schedules connect the university with Miami, Tampa, and Tallahassee, and replace a stop that had been made in Naples.

OurBus introduced service in the Miami – Tampa corridor in May. With stops in Fort Lauderdale, Fort Myers, and Sarasota, it aims to attract traffic from established carriers such as Greyhound, Megabus, Florida Shuttle, and RedCoach. Originally a daily service, the schedule was later reduced to four days a week. **Martz First Class Coach** is the operator of record.

Major national carriers also took action in the Southeast. **Megabus.com** added frequency between Gainesville (home of the University of Florida) and Orlando. **Greyhound**, in cooperation with Alabama’s transportation department, initiated a new [route between Birmingham and Florence](#) in May with stops in Athens, Huntsville, and Cullman; one daily round trip is offered. The carrier also added local New Orleans – Lafayette – Ruston, LA service.¹³ In North Carolina, work commenced on the \$20 million state-of-the-art [Raleigh Union Bus Station](#), slated for completion in 2022.

Figure 4. Notable New Routes in Florida



CENTRAL, MOUNTAIN, AND PACIFIC NORTHWEST REGIONS

Most of the activity in the Central, Mountain, and Pacific Northwest regions revolved around intrastate Texas and rural-service initiatives.

Vonlane, the premium operator in Texas that seeks to attract those who would otherwise fly, added a new [Fort Worth - Houston](#) service in November. The latter consists of up to four schedules in each direction and complements the company's existing Dallas – Houston service as well as its other routes in the “Texas Triangle”, all of which offer meals and drinks served by an onboard attendant. The company's emphasis on weekday business traffic rather than individualized personal business trips, which tend to be oriented towards weekends, makes its operating model quite different than most other carriers.

Elsewhere in Texas, and following a successful pop-up operation over Thanksgiving, **OurBus** launched Dallas – Austin and Dallas – Houston routes. These services, which operate from downtown Dallas and Houston and Austin's University of Texas campus, put OurBus in competition with Greyhound, megabus.com, Vonlane, and several Hispanic oriented carriers, including Tornado Bus. Each service operated by **AJL International** is generally limited to one round trip that runs on weekends.

Last January, **Greyhound** announced it was ending its Spokane – Missoula route, its last direct link between Montana and its national network. In response, **Jefferson Lines** [picked up one of the two daily schedules](#) and also extended the eastern end of the route to Billings, which had been cut by Greyhound in 2017. That leg also serves Bozeman, Butte, and Kellogg, MT. Jefferson reinstated the second former Greyhound schedule in May.

Bustang, the carrier created by and receiving financial support from Colorado's transportation department, enjoyed robust expansion. In July,

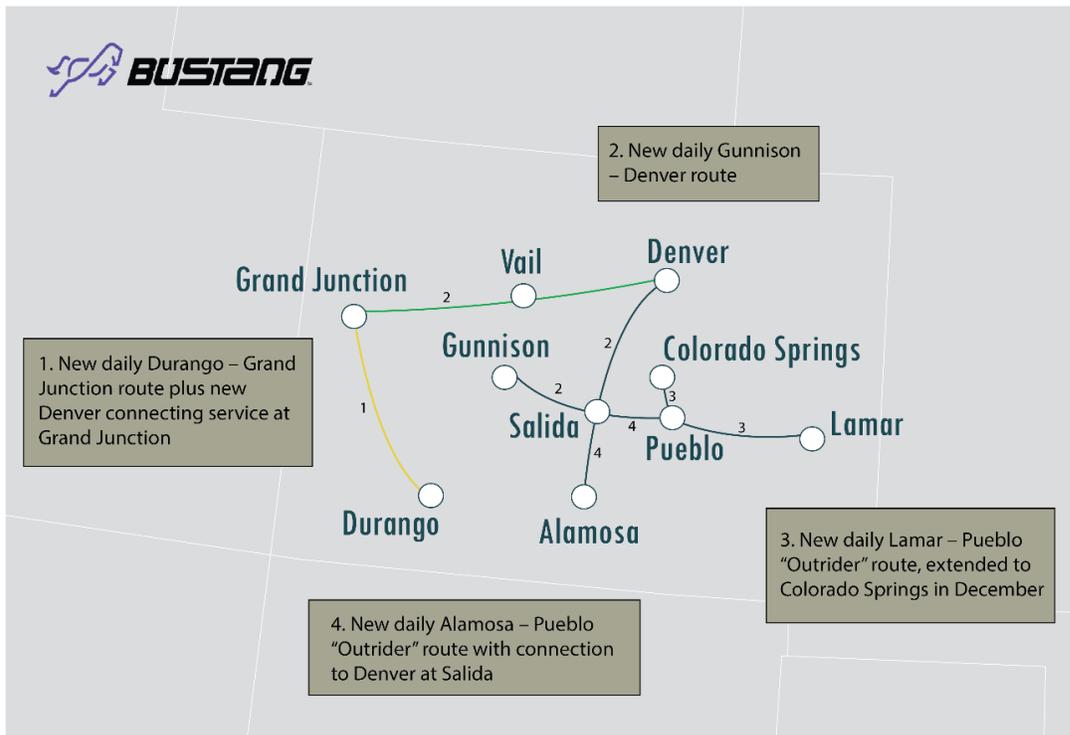
the department reported that the network had grown over 300% since its launch in 2015, and that both ridership and revenue were well above original projections. Funded in part by federal intercity bus grants, the carrier put great emphasis on expanding its Outrider brand last year, a rural regional network designed to both service local traffic and offer well-timed connections to Denver. The program offers partners new 38-passenger motor coaches purchased by the state government, and provides extensive marketing, scheduling, and distribution support. In exchange, several existing operations were rebranded as **Bustang Outrider**.

Most of its 2018 growth came from partnerships with local transit entities and private partners. In January, the first Outrider route was introduced, [connecting Lamar and Pueblo](#), operating weekdays and replacing a regional operation by Pueblo SDRA that used 12-seat vehicles. The route was extended in December to Colorado Springs, providing a connection to Denver.

A route [between Alamosa and Pueblo](#) was launched in May, creating new connections between these points. This service, also operated by the Pueblo SDRA, consists of one trip in each direction and offers a well-timed connection in Salida to a third new route, Gunnison – Denver, which also runs once daily and is operated by Alpine Express, a local airport shuttle and transport firm.

Finally, in June Bustang added a new route along the state's Western Slope region [connecting Durango and Grand Junction](#), operating daily via the resort town of Telluride. It connects with [a new mainline Bustang trip](#) added between Grand Junction and Denver that was made possible by extending an existing service westward from Glenwood Springs. The service is operated by SoCoCaa, an organization that formerly offered portions of this route under the **Road Runner**

Figure 5. Notable New Routes in Colorado



Express name. Bustang’s mainline routes, meanwhile, are operated by **ACE Express Coaches**. By serving many different types of travelers, including tourists and local residents, and by offering connections to Greyhound and other carriers at Denver Union Station and elsewhere, Bustang is a success story that will continue to attract attention. Its route map is reminiscent of the region’s erstwhile narrow-gauge railroad passenger network.¹⁴

On the Great Plains, **Beeline Express** [launched a new once-a-day service](#) between Wichita, KS and Joplin, MO in cooperation with Kansas’ transportation department, replacing an existing service between Wichita and Garden City, KS. The route has stops at El Dorado, Fort Scott, and other points, and offers connections with Greyhound and Jefferson Lines. Beeline Express division of Village Tours. **Greyhound** added also a state-subsidized service, a daily Kansas City, MO – Salinas, KS roundtrip as well as a new

Greyhound, in coordination with the State of Washington, assumed operation of the [state-](#)

[subsidized Dungeness Line](#) route in July, a branded service linking Seattle and Port Angeles with stops in Port Townsend, Discovery Bay, Sequim, and other points. With two daily schedules in each direction, this service links these peninsular locations with ferry services (this is one of the few Greyhound routes in which the coach itself is put on a ferry), Amtrak, and the national bus network.

Greyhound’s service [connecting Salt Lake City, UT with Reno, NV ended](#) in February. This operation was the western segment of a longer route that extended east to Denver, CO. Although the cutback leaves Salt Lake City with only two westward bus connections (one to Boise, ID/Portland, OR, and another to Las Vegas), Greyhound filled the void by forging an interline agreement allowing its customers to make transfers to the *California Zephyr*, the Amtrak train that follows a nearly parallel route. Another casualty last year was the state-subsidized [Island Express](#) between Houston and Galveston.

CALIFORNIA AND THE SOUTHWEST

The long-awaited introduction of **Flixbus** to the United States came on May 31. This carrier's spectacular growth across the Atlantic, achieved in part by acquiring existing services, such as the Deutsche Bahn bus subsidiary in Germany, has catapulted it to continental Europe's largest operator within less than five years of its launch. This ensured that much publicity would surround its U.S. arrival.

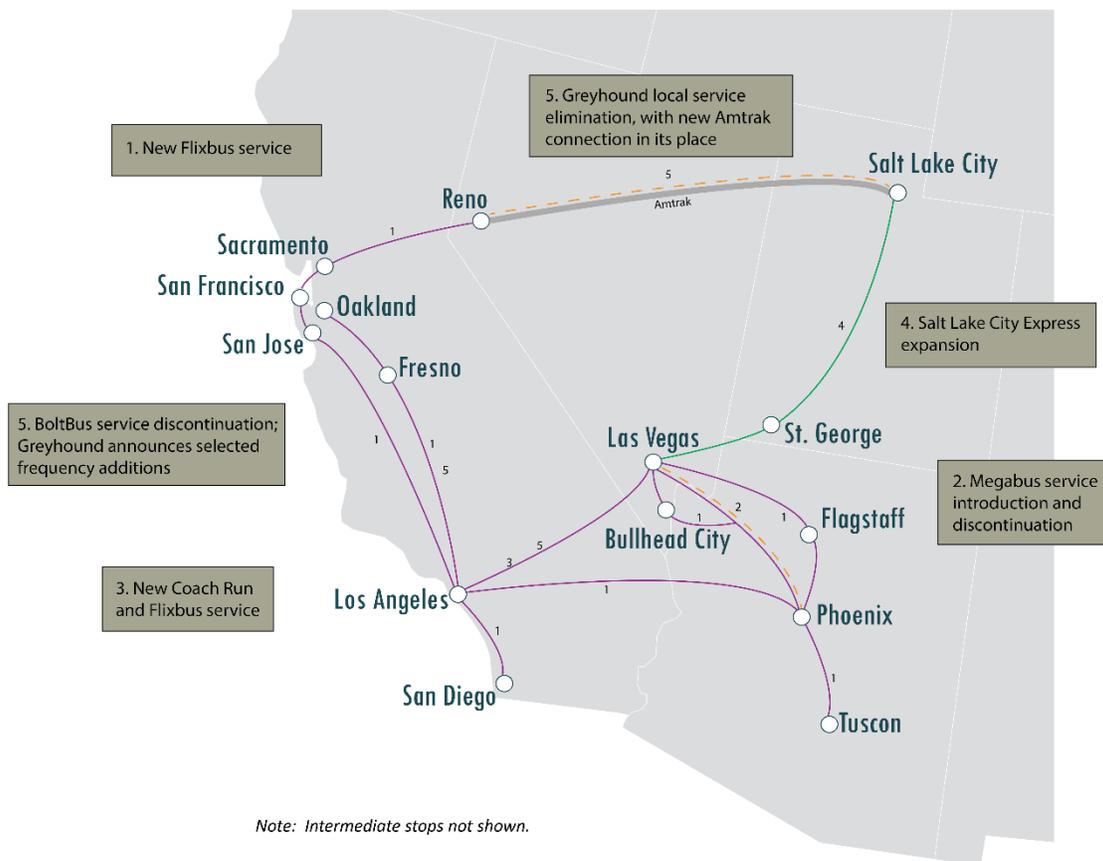
Flixbus has a distinctive business model: the company partners with established bus companies instead of owning and operating buses, allowing it to focus on service planning, business development, and customer care. Although this asset-light approach is not unique in the United States (numerous brands, primarily in the east, use a similar model), Flixbus' technology platform sets it apart. With a sophisticated website, global brand awareness

distribution capabilities, and advertising savvy, Flixbus assumes responsibility for marketing, pricing, and ticket sales, while leaving operators to do what many are best-suited to do: manage their bus operations.

Flixbus' launch in May centered on four routes: Los Angeles – Las Vegas, Los Angeles – Phoenix, Los Angeles – San Diego, and Tucson – Phoenix – Las Vegas (see sidebar). Connections between its buses can be made at a variety of points, including Palm Springs and Yuma, CA. San Diego – Las Vegas and Los Angeles – San Francisco Bay routes followed a few months later, which put Fremont, Fresno, Bakersfield, Salinas, and many other California cities on its map. The launch of Reno service extended its footprint in Sacramento and northern Nevada.

This pattern of service rollouts differs sharply from that of BoltBus and Megabus a decade ago for three reasons.

Figure 6. Notable New Routes in the Southwest and California



1. *Flixbus schedules typically involve several stops in a metropolitan area rather than primarily serving the downtown market.* Many of its Los Angeles services, for example, include stops at the University of Southern California, the University of California Los Angeles, and Union Station, as well as in Anaheim, Burbank, Santa Monica, and Ontario.

2. *The company has oriented its services heavily toward leisure travelers and tourists.* A case in point: its primary stop in Las Vegas is at Caesars Palace's charter-bus parking lot, adjacent to the Forum Shops, one of the busiest shopping malls in the country.

3. *Flixbus aggressively adjusts frequency to meet demand. Although it offers daily service on some routes, service on others is available only on selected days.* As a result, the competition facing existing carriers varies sharply by corridor.

Flixbus has not formally disclosed its passenger traffic or profitability. Nevertheless, several details are known:

- Flixbus [reported](#) to Bloomberg that its rollout has been successful, with load factors averaging 60% to 75% on its core routes. To date, the carrier has relied entirely on single-deck buses.
- The carrier reported to this same outlet that it is planning to enter the Northeast and Texas markets in 2019, and that it is also eyeing the Midwest (Chicago), Florida, and the Pacific Northwest for eventual expansion.
- No public comments have apparently been made about whether it will expand frequency beyond particular days of the week like weekends, which now dominate its schedule.

To counter Flixbus' entry into the Phoenix – Las Vegas corridor, **megabus.com** partnered with Windstar Lines to relaunch daily service between these cities in May using Windstar-

branded buses. Originally launched in 2007, the first iteration of its Phoenix – Las Vegas service was annulled when the company ended all West Coast operations the following year. The second iteration was dropped in November, when Megabus canceled both of its daily schedules in each direction, apparently due to weak demand.

Adding to the Las Vegas mix, **Coach Run** began offering in late 2018 a daily service (since reduced to four days a week) between Los Angeles and the Las Vegas Strip, with stops at Rosemead and Rowland Heights, CA and numerous casinos.

In the midst of this surge in competition, **BoltBus** quietly ended all of its California-based services, including its service linking Los Angeles to both the Bay Area and Las Vegas in October.¹⁵ Upon terminating these services, Greyhound announced additional frequencies and new stops at Los Angeles Union Station and Las Vegas' South Strip Transit Center.

Elsewhere, **Salt Lake City Express** has enjoyed rapid growth between its Utah hub and St. George and Las Vegas since purchasing both Aztec Shuttle and St. George Express in 2016. This carrier, having routes extending from Montana to Nevada, reported to the Chaddick Institute that its system-wide traffic rose from about 285,000 passengers in 2017 to well over 300,000 last year.¹⁶



Salt Lake City Express is benefitting from significant traffic growth in the Las Vegas market. Photo from saltlakecityexpress.com

SPOTLIGHT ON: FLIXBUS

Flixbus made its market on the Southwest region by rolling out a wide range of services in 2018.

State of California – Las Vegas. Los Angeles-Las Vegas, among its busiest routes, is a daily service with up to seven departures in each direction. Flixbus competes with six prominent carriers: Megabus and Greyhound (which serve the general market), CoachRun and Las Vegas Express (oriented toward casino goers), LuxBus (oriented to leisure travelers willing to pay a premium), and Tufesa (oriented towards the Hispanic market). To differentiate its service, Flixbus serves locations unavailable on other carriers. Several trips originate in Santa Monica, Burbank (weekends only), and Anaheim, with Ontario, Victorville, and Barstow among the intermediate stops.

FlixBus also offers direct and daily service between San Diego and Las Vegas (via Escondido, Anaheim, and San Bernardino). It rolled out a daily overnight round trip in December between the San Francisco Bay Area and Las Vegas (via Fresno and Bakersfield, CA). All are operated by **Tourcoach**, USA Coach Services, and Transportation Charter Services.

Bay Area-Metro Los Angeles. Up to seven buses operate between San Francisco, San Jose, and downtown Los Angeles in each direction. On this route, the carrier competes heavily with Greyhound, Hoang Express (a service aimed at Asian travelers), and Megabus. Rather than focus on travel between the downtown districts, however, Flixbus offers a wide range of pickup and drop-off choices, with select trips making stops in Anaheim, Richmond, and Vallejo. Certain trips also link Reno and Sacramento to Los Angeles. FlixBus partners with **Amador Stage Lines**, **Classic Charter**, and **Tourcoach** to operate this service.

San Diego-Los Angeles. On this heavily traveled route, in which Amtrak is dominant, Flixbus also offers up to seven trips in each direction daily, with several trips continuing to Burbank and Las Vegas.¹⁷ Buses make three stops in San Diego: one at the Old Town Historical District (near downtown), another at Mission Valley, and a third at suburban La Jolla, which allows passengers to avoid traveling to a central terminal, as is often necessary on Greyhound. The majority of these trips are operated by **Tourcoach**.



Photo: Flickr/Joe Wilcox

Tucson/Phoenix – Los Angeles. Flixbus offers up to four schedules in each direction daily, in direct competition with TAP Royal, El Paso Limo, Greyhound, and Tufesa. On peak days, up to three buses stop each way in Palm Springs. All buses stop at the Phoenix Sky Harbor Airport, allowing for a wide range of shuttle bus and public transit connections. On the route's west end, select schedules start and end in Anaheim and Burbank. The company partners with **American Explorer Motorcoach**, **Pacific Coachways**, and **Gray Line Arizona** to provide this service.

Tucson/Phoenix – Las Vegas. This route, served with up to three schedules in each direction, caters heavily to tourists and students at the University of Arizona and the University of Las Vegas, and has a variety of intermediate stops, including Bullhead City and Tempe. This gives Flixbus the only direct service between Tucson and the Nevada city.

A spinoff route, Tucson/Phoenix – Flagstaff, which is a standalone service available on selected days, is aimed primarily at college students and leisure travelers. This offers faster trips than Greyhound, which requires passengers to make connections in Phoenix. Flixbus partners with **Arrow Stage Lines** to provide both services.

III. CONCLUSIONS & PROJECTIONS

America's intercity bus industry is pivoting, giving it a much different character than the frenetic years between 2006 and 2013, when BoltBus, Greyhound Express, and megabus.com bullishly expanded service between the downtowns of major cities. A new breed of operator, including Flixbus and OurBus, is putting greater emphasis on stops dispersed throughout metropolitan regions while limiting service on some routes to particular days of the week. These fast-growing carriers, borrowing a page from the playbook of Allegiant Airlines and Sun Country Airlines, adhere to the belief that services can prosper without schedule dominance and seven-days-a-week operations.

Among the developments to watch in 2019 are:

- **Possible changes at megabus.com stemming from Stagecoach's sale of the carrier** to Variantt. FirstGroup may also be eyeing changes to Greyhound.
- **More premium services being rolled out**, including the possible expansion of Vonlane outside of Texas.
- **Continuing challenges presented by persistently low gasoline prices**, particularly outside the Northeast Corridor.
- **Ongoing issues at the Port Authority Bus Terminal** in New York, which could cause market shifts in coming years.
- **Expansion of Flixbus into the Northeast and Texas**, and the response of existing carriers to this feisty new competitor.

These developments and others, including more extensive use of crowdsourcing, will make the remainder of this decade a fast-paced time for providers of scheduled intercity service.

To reach the study team, please email chaddick@depaul.edu or call 312.362.5732.

Additional Chaddick Institute publications, including past annual reviews of intercity bus travel, can be found at las.depaul.edu/Chaddick.

SPECIAL SECTION: PREMIUM SERVICES

The Chaddick Institute is monitoring the expansion of premium-class bus lines providing scheduled service in the United States. These services are attracting new demographic and socioeconomic segments to motor coach travel, including travelers otherwise likely to fly.

Since the start of 2018, the number of distinct “brands” offering this service has grown to 17 with the addition to four new services: Best Bus Prime, Catskill Carriage, Line by Trailways of New York, and Washington Deluxe’s Lux Bus Executive Travel. One existing carrier previously offering scheduled-service, Royal Traveler, still operates but has evolved into a charter-only operation. Catskill Carriage and Line provide service during the summer season only.



Attendant serving refreshments on the Boston - New York LimoLiner. (LimoLiner photo)

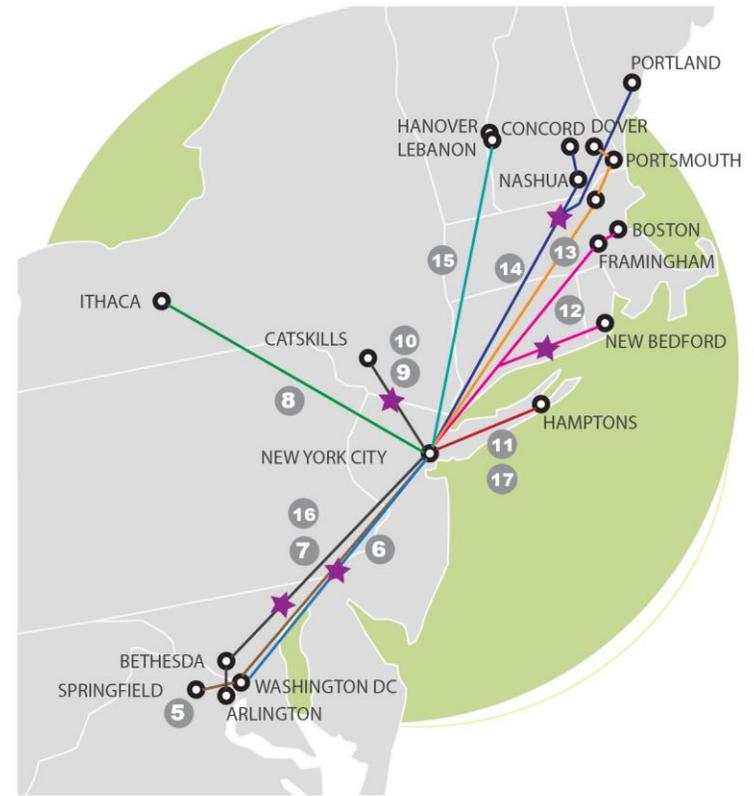
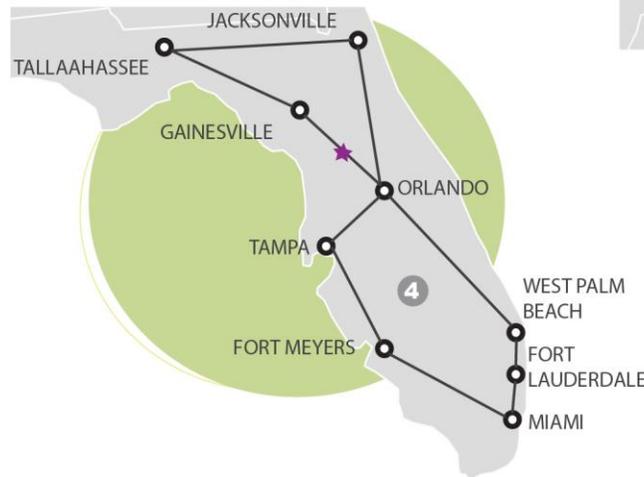
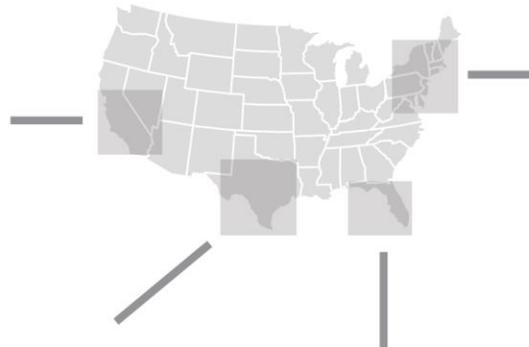
Like airlines and Amtrak, the definition of terms such as “premium”, “first class”, “business class”, and “deluxe” differ between carriers. Most of the carriers (see Table A1 below) utilize a 2 x 1 seating formation (one seat and two seats on opposite sides of the aisle) rather than the 2 x 2 seating on conventional bus services. As noted on the table and the accompanying map on page 22, Vonlane, which operates intrastate routes in Texas, is the largest of these carriers, and is among several other operators that feature an onboard attendant and tables available for business meetings. These services have similarities to the Trailways’ Golden Eagle service of the 1960s, which featured motor coaches with small galleys and hostess service, and Pacific Western’s popular Red Arrow service in Canada.¹⁸ Please [click here](#) or visit the Chaddick Institute website for our *interactive map* featuring these carriers.

Table A1
Business- and First-Class Bus Services of the United States

	<i>Route & Weekday frequency in each direction</i>	<i>Seating (Configuration, Reserved Seating, Vehicle Capacity)</i>	<i>Notable Amenities</i>	<i>Recent Expansion</i>
Best Bus Prime 	NY– Washington, D.C. & Springfield, VA and NY – Manassas & Vienna, VA	2 x 1	Entertainment streaming	Launched 2018
C&J First Class 	New York – Tewksbury, MA, Portsmouth & Dover, NH	2 x 1	Entertainment streaming, snacks and beverages	Launched 2013
Cabin (Sleeper Bus) 	Los Angeles – San Francisco	Private sleeping cabins, spacious lounge	On-board attendant, fully-stocked bathroom	Launched 2017, currently upgrading fleet for 2019 re-launch

Catskill Carriage 	New York – Catskill resorts, one roundtrip weekly during summer	2 x 2	“artisanal” snacks & beverages, on-board attendant	Launched 2018
Concord Coach Plus 	New York – Concord & Nashua, NH New York – Portland, ME	2 x 1 Reserved seating	Entertainment streaming, complimentary snacks and beverages	Launched 2015, Expanded 2018
Campus-to-Campus 	New York – Ithaca, NY (Cornell University)	2 x 2 Table seating for 4	Snacks & beverages, loyalty program, “C2C” gift certificates	Since at least 2010
Dartmouth Coach 	New York – Lebanon & Hanover, NH	2 x 1	Entertainment streaming, snacks & beverages	Expanded in 2015
Hampton Jitney Ambassador 	New York – Hamptons & Montauk New York – North Fork (Long Island)	2 x 1 Reserved seating Total: 30	Snacks & beverages, on-board attendant	Since at least 2012.
Hampton Luxury Liner VIP Diplomat 	New York – Hamptons & Montauk New York – North Fork (Long Island)	2 x 1 Total 27	Snacks and beverages, on-board attendant	VIP Diplomat launched in summer 2018
LimoLiner 	New York – Boston and & New Bedford (Friday & Sunday, summer only)	2 x 1 Table seating for 2 or 4 Reserved seating Total: 28	Snacks & beverages, on-board attendant, personal hot towels	Launched to New Bedford in 2018
Line by Trailways of New York 	New York – Catskill resorts (New York state).	2 x 2	Snacks & beverages, on-board attendant, mobile ticketing	Launched summer 2018
Lux Bus 	Anaheim, CA – Las Vegas	2 x 2 Reserved but open seating Total: 48	Snacks & beverages, on-board attendant, entertainment streaming	Since at least 2012
Red Coach - First Class 	Intrastate Florida, from Miami, Orlando, Tallahassee, and Tampa	2 x 1 Reserved seating Total: 27 (business class: 38)	140-degree recline, entertainment streaming	Added Ft. Myers in 2018
Tripper Bus Elite 	New York – Bethesda, MD/Arlington VA	2 x 1 seating Total: 34	Entertainment streaming	Launched 2017
Vamoose Gold 	New York – Bethesda, MD & Arlington, VA	2 x 1 seating Total: 34	Entertainment streaming, loyalty program	Since at least 2011.
Vonlane 	Intrastate Texas, linking Austin, Dallas, Ft. Worth, San Antonio & Houston	2 x 1 Table seating for 2 or 4 Reserved seating Total: 22	Liquor license, snacks & beverages, on-board attendant, meals on certain trips	Austin – San Antonio and Ft. Worth – Houston in 2018
Washington Deluxe Lux Bus 	New York – Washington, D.C.	2 x 1 Total: 34	Loyalty program, Entertainment streaming	Launched 2018

BUSINESS AND FIRST-CLASS BUS SERVICES OF THE UNITED STATES

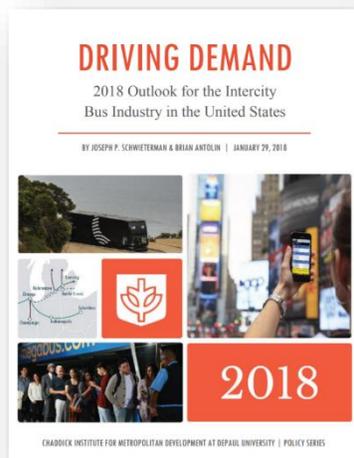


BUS SERVICES

- 1 CABIN
- 2 LUX BUS
- 3 VONLANE
- 4 RED COACH
- 5 BESTBUS PRIME
- 6 WASHINGTON DELUXE LUX BUS
- 7 TRIPPER BUS ELITE
- 8 CAMPUS TO CAMPUS (C2C) SHUTTLE
- 9 CATSKILL CARRIAGE
- 10 LINE BY TRAILWAYS
- 11 HAMPTON JITNEY AMBASSADOR
- 12 LIMOLINER
- 13 C&J FIRST CLASS
- 14 CONCORD COACH PLUS
- 15 DARTMOUTH COACH
- 16 VAMOOSE
- 17 HAMPTON LUXURY LINER
- ★ NEW OR EXPANDED SERVICE IN 2018



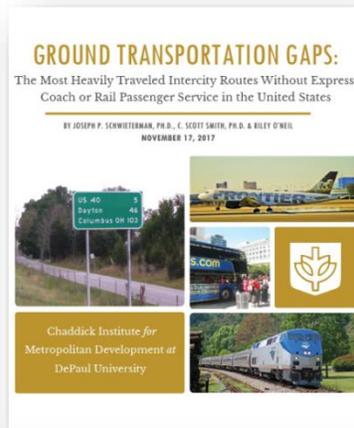
NOTABLE RELATED STUDIES BY THE CHADDICK INSTITUTE



Driving Demand: 2018 Outlook for the Intercity Bus Industry in the United States

January 29, 2018

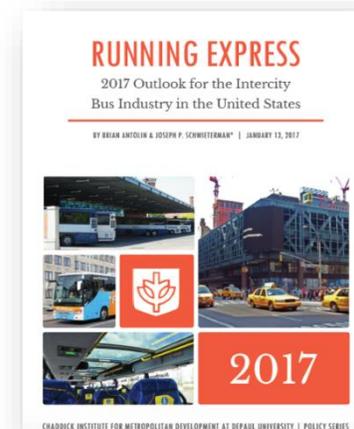
Our analysis of major travel corridors in which travelers do not have access to express coach lines, such as BoltBus, Go Buses, and Megabus, or passenger railroads, making it difficult to avoid flying or driving. [Full report here.](#)



Ground Transportation Gaps: The Most Heavily Traveled Intercity Routes Without Express Coach or Rail Passenger Service in the U.S.

November 17, 2017

Our analysis of major travel corridors in which travelers do not have access to express coach lines, such as BoltBus, Go Buses, and Megabus, or passenger railroads, making it difficult to avoid flying or driving. [Full report here.](#)



Running Express: 2017 Outlook for the Intercity Bus Industry in the United States

January 13, 2017

A complete review of major initiatives by the intercity bus industry in the 2016 calendar year, organized by region. [Full report here.](#)

AUTHOR INFORMATION



Brian Antolin is an entrepreneur, consultant, and researcher following his childhood love for travel and transportation. As a respected thought leader in public transportation, Brian's research and commentary has been cited in numerous national publications including the *Boston Globe*, *Philadelphia Inquirer*, *New York Times*, and regional affiliates of National Public Radio. Prior to launching his tour and transportation company, CoTo Travel, Brian worked for BoltBus, a division of Greyhound Lines, Inc., in various operations and management positions.



Joseph P. Schwieterman, Ph.D., a professor of Public Service Management and director of the Chaddick Institute for Metropolitan Development at DePaul University, is a nationally known authority on transportation and urban economics. He has testified three times on transportation issues before subcommittees of the U.S. Congress. Schwieterman holds a Ph.D. in public policy from the University of Chicago and is president of the Chicago chapter of the Transportation Research Forum. He is widely published on intercity bus and rail travel.



Matthew Jacques is currently pursuing his Master's in Public Administration at DePaul's School of Public Service, and he is passionate about strengthening the dialogue between citizens and government, infrastructure planning, social service delivery, and community development. After earning a Bachelor's degree from the University of North Carolina at Chapel Hill, he studied acting in New York and launched and managed multiple B2C businesses, focusing on improving firms' social benefits and community outreach.

The Chaddick Institute, which promotes effective planning and transportation, does not receive financial support from intercity bus lines or suppliers of bus operators.

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FOOTNOTES

¹ Congestion in the New York area is being affected by the rebuilding of the Lincoln Tunnel approach highway (I-495), which connects the Tunnel to the New Jersey Turnpike. [This project](#) is expected to take years and cause major congestion in and out of Manhattan.

² This quote is from Page 6 of the press release announcing Greyhound's six-month earnings through September 30, 2018, which is available at <https://www.firstgroupplc.com/~media/Files/F/FirstGroup-Plc/press-release/pr-13-11-2018.pdf>

³ Please refer to our past *Outlook* reports for information about these services, available [here](#) on the Chaddick Institute website at las.depaul.edu.

⁴ The Greyhound service between the George Washington Bridge Station and Newark, NJ provides rail and bus connections to a wide variety of destinations. New Jersey Transit once operated a service from the Bridge station to Newark International Airport; that service, however, is no longer available.

⁵ For information about this new fee, click [here](#) for an article on [Ithaca.com](http://www.ithaca.com) or visit www.ithaca.com/news/ithaca/common-council-approves-permit-fee-for-intercity-buses/article_638db448-e38a-11e8-aad9-6770e8c3f823.html

⁶ Limoliner launched a peak day leisure service between New York and New Bedford, MA, in the Summer, running Fridays to New Bedford and Sundays to New York.

⁷ This service gives New Haven, Yale University's hometown, its first nonstop service to the Hub City by a city-to-city express operator

⁸ This service competes with the long-established Plymouth & Brockton service between these points.

⁹ For a summary of the favorable ridership trends on the *Virginia Breeze* during its first year of operation, please click [here](#). The new schedule is a Friday eastbound trip and a Sunday westbound trip.

¹⁰ The end of this service followed numerous attempts to bolster ridership and revenue, including the combination of two separate routes (NY-Lancaster/York via King of Prussia and Philadelphia-Pottstown) and a cross selling agreement with Amtrak as a Thruway service along selected city pairs.

¹¹ More details on these campus-oriented services are provided on page 4.

¹² OurBus' stop in Pittsburgh is located at Carnegie Mellon University

¹³ Greyhound increased New Orleans – Lafayette frequency, which now encompasses up four trips daily. This new service includes a New Orleans – Lafayette – Ruston, LA trip, which was added to the schedule in July 2018 and makes a variety of local stops.

¹⁴ The route network that Bustang has develop closely mirrors the narrow gauge network once operated by the Denver Rio Grande & Western Railroad. We thank Michael R. Wienman of PTSI Transportation for this insight.

¹⁵ The services paralleled rival Megabus, having a stop at Los Angeles Union Station, three stops in the Bay Area (San Jose, San Francisco, and Oakland), and intermediate stops that included Barstow, Hollywood, and Fresno, CA.

¹⁶ Kathy Pope at Salt Lake City Express reported to the Chaddick Institute that, since the company purchased Aztec Shuttle (a service linking St. George, Utah, to Salt Lake City), it has experienced 535% growth on that route. Since purchasing St. George Express that year (a service linking St. George and Las Vegas), it has experienced 415% growth on that route.

¹⁷ This was originally offered as part of a "through" service to Arizona. However, Flixbus restructured it as standalone route as well as one with through service to Las Vegas.

¹⁸ The Red Arrow service, which features reserved seating and galleys with snacks and beverages, is available on several routes in western Canada, including Calgary – Edmonton.