



Includes 2022  
Year-in-Review

# New Destinations:

## 2023 Outlook for the Intercity Bus Industry in the United States

The Chaddick Institute's Annual *Intercity Bus Review* | February 7, 2023  
By Joseph P. Schwieterman, Abby Mader, and Allison Woodward

Attend our free webinar on this study on February 23, 2023, at 2 pm CT. See page 24

A series of initiatives by intercity bus lines in 2022 surprised observers and are imbuing optimism about scheduled long-distance bus travel. The past year's developments, ranging from the rollout of first-class and sleeperbus service to new partnerships to expanded schedules and reservation options, are accelerating the transformation of an industry that many regarded as stodgy and stuck in a bygone era just a few years ago. The industry is becoming more data-driven and open to experimentation.

Yet, the excitement generated by these developments is tempered by the realization that serious problems persist. Chronic driver and mechanic shortages, the shuttering of traditional bus terminals, the increasing average age of motor coaches, unpleasant customer experiences due to the conditions around curbside pick-up spots and in terminals, and unruly passengers continue to hurt the industry. The intercity bus industry continues to be overlooked in many discussions about the U.S. intercity travel market despite handling a greater modal share than passenger rail and a sizable share compared to air travel on many routes under 250 miles.

*New Destinations* highlights the notable developments of 2022, organized by geographic region and key nationwide trends, each with a prediction.

**We also provide insights on the status of the intercity bus ridership nationally on page 20.** We exclude from our review moves to restore schedules dropped during the pandemic, most activity by airport and campus shuttle operators, and efforts by rural bus lines to shift from regularly scheduled service to variable-route or demand-responsive services. The study focuses instead primarily on conventional city-to-city offerings.

### Interested in a Particular Region?

Refer to our geography sections:

- New England & New York State, page 2
- Mid-Atlantic States, page 4
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Photo caption (above): A FlixBus service on Chicago's Canal Street, October 2022.

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JOSEPH  
SCHWIETERMAN,  
PHD



ABBY  
MADER



ALLISON  
WOODWARD

## Our Prediction about Accelerated Integration of FlixBus and Greyhound

Greyhound and FlixBus will be sold on a new reservation platform developed by FlixBus for travel starting February 22, 2023. The platform introduces **reserved seating** and other conveniences to Greyhound passengers. We expect connections between the two brands' buses to increasingly be offered to travelers on a single ticket. See page 19 for our five prognostications for the rest of 2023 and beyond.

## NEW ENGLAND & NEW YORK STATE

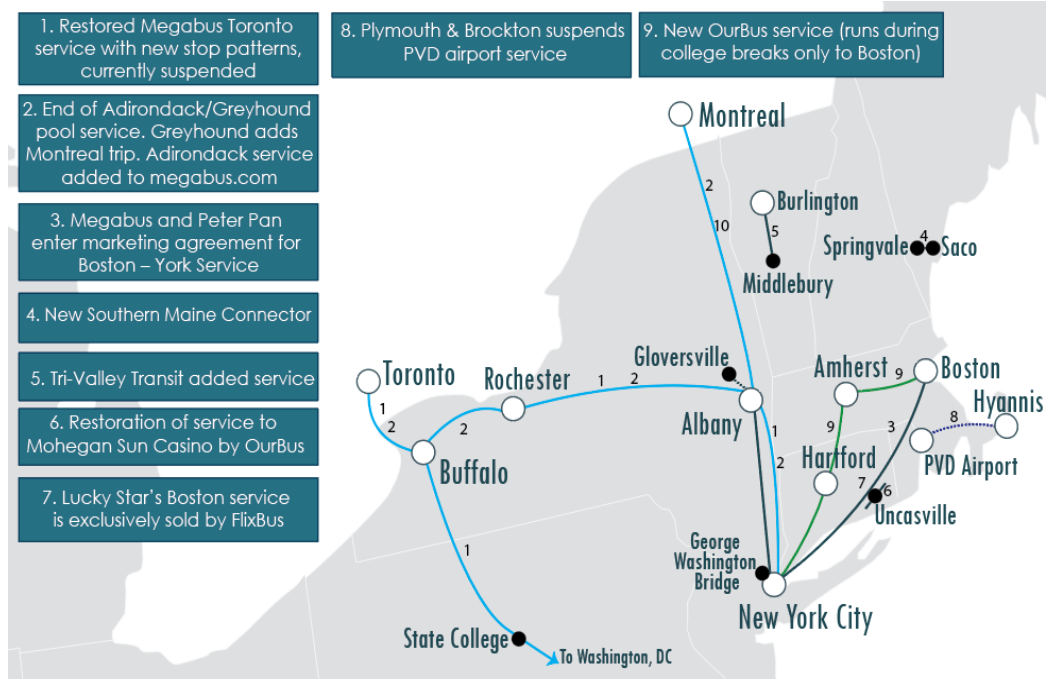
This region's activity has centered on service launches in major corridors and competitive moves by Adirondack Trailways and Greyhound due to the cancellation of their longstanding "Operating Pool" agreement. FlixBus, Megabus, and Peter Pan each made notable moves in Boston. All three business-class services linking New York City to northern New England, by **Concord Coach**, **C&J**, and **Dartmouth Coach**, are back, as depicted on our [Interactive Map of Premium Bus Services](#).

The cancellation of the longstanding **Greyhound and Adirondack Trailways** Operating Pool, announced by Greyhound in May, changed this region's bus-travel landscape. The pool included joint ticketing and revenue-sharing arrangements for services linking New York City to

Upstate New York, southern Canada, and other points. It was designed to reduce schedule duplication and allow ticketed passengers to switch between carriers (usually for a fee) as their plans change.<sup>1</sup> While announcing the termination, Greyhound noted that it would expand service between New York, Albany, Buffalo, and Montreal. By autumn, it was

running four New York – Montreal buses daily, one more than in 2021. A similar operating pool between Greyhound and Peter Pan ended in 2017.

After the Pool was annulled, Greyhound ceased providing arrangements for brands affiliated with Trailways of New York, including Adirondack and New York Trailways, to use its **Albany Bus Terminal**. Trailways and **Peter Pan Bus Lines** moved to a new location with a modular waiting room roughly two blocks away while maintaining existing schedules. Another surprise came in November, when **Trailways of New York announced an agreement with Megabus** that puts much of its network, including its New York state and southern Canada services, on the megabus.com platform. Separately, Adirondack Trailways dropped its service from Albany to Gloversville, NY, an apparent victim of the decline in traditional office commuting. At roughly the same time, discussions about [whether Albany](#)



[needs a new](#) consolidated bus and transit station captured headlines.

Meanwhile, Megabus’s moves in this region make clear that, despite its withdrawal from the Midwest and Arizona, California, and Nevada, it will vigorously [defend its market share](#) in this part of the country. Megabus restored almost all its services from before the pandemic and was particularly aggressive last year on the Boston – New York route. On peak days, Megabus typically offered six trips in each direction, mainly using double-deck coaches configured with 81 seats, more than 50% more than single-deck coaches. Then, in the year’s final days, Megabus [announced a partnership](#) with **Peter Pan Bus Lines**, putting that carrier’s service in this corridor on megabus.com while working with it to provide additional service during peak periods. Following the agreement, Megabus began selling Peter Pan trips on its website and ended its own service on the route. On peak days, Peter Pan now runs ten trips in each direction.

**FlixBus** expanded its Boston – New York service by forging a partnership with **Lucky Star**, a pioneer of the “Chinatown bus movement” of the late 1990s.<sup>2</sup> In November, Lucky Star services became exclusively available on flixbus.com. The niche provider offers five to seven round trips daily between New York’s

Chinatown neighborhood and South Station. Pricing appears more dynamic than before, with higher



A New York-bound Peter Pan coach is in Silver Spring, MD on January 9, 2023. At the route’s terminus, transfers can be made to New England.

fares on peak dates.

Also in Boston, **FlixBus** [assumed operation](#) in May of the pair of former BoltBus gates at **South Station Bus Terminal** while continuing its less-frequent service to New York in the same metropolitan region from Brookline and Cambridge, MA. These gates came to FlixBus as part of its parent’s Greyhound acquisition in 2021. FlixBus also leased space at a parking lot a few minutes south of the station and moved some arrivals and departures there. Its latest schedules, however, show all boarding and alighting at the South Station gates. As a result, travelers can now ride from this prime location to Providence, RI, Hartford and New Haven, CT, and New York and make connections to many other points.

The competition from the Northeast region to southern Canada has intensified as well. After the reopening of the Canadian-US border, **Megabus** [relaunched service](#) between Toronto, ON, and New York and Washington, DC. The New York route competed head-to-head with Adirondack, Greyhound, FlixBus, and an OurBus connecting service.<sup>3</sup> Among the minor changes, Megabus rerouted one of its two daily Toronto - New York

A collection of logos for bus carriers. From top to bottom: OurBus (green leaf logo), Greyhound (white cheetah logo on a dark blue background), Plymouth &amp; Brockton (orange 'pb' logo), Peter Pan (green stylized logo with a panther head), FlixBus (white text on a green rectangular background), and megabus.com (blue text). Below the logos is the text: "Carriers making notable moves in New England and New York State in 2022 (partial representation)."

buses via Albany, NY. On the Washington (via Philadelphia) route, Megabus added stops at State College and Harrisburg, PA. The New York route has since been suspended, possibly due to a desire only to sell Adirondack services on megabus.com, while the Washington route, also suspended, may be a seasonal offering. **FlixBus** also expanded in southern Canada last year by adding a Windsor – Toronto, ON service and other new services.

Coach operator **Plymouth and Brockton Street Railway** had in 2021 expanded beyond its core Cape Cod – metropolitan Boston routes by adding a new service linking Hyannis and Woods Hole. MA to Providence’s **TF Green International Airport**. Last summer, however, that service was abruptly [canceled](#) for undisclosed reasons. Driver shortages and the Rhode Island airport’s limited flight options compared to Boston Logan International Airport—a major destination for P&B riders—may be to blame.

In June, **OurBus** [restarted its service](#) linking Connecticut’s Mohegan Sun Casino to both Boston and New York. This is noteworthy considering that Mohegan Sun, once abuzz with casino and intercity buses, saw essentially all of its scheduled coach service suspended during the pandemic. OurBus [made one stop](#) in each direction, five times weekly, on a New York - Boston trip. This has been suspended for the season, with its possible resumption this March.<sup>4</sup>



Virginia Breeze bus on the Valley Line is at West Falls Church, VA on January 9, 2023. Riders can monitor their trip on Megabus Bus Tracker.

**OurBus** experimented last year with a connecting service linking Albany, NY, to Philadelphia and Washington, DC, by adding a stop to an Albany-New York trip at **George Washington Bridge Bus Station**. At the “GWB,” riders could make transfers to reach numerous Northeast Corridor points and Upstate New York four days a week. Finally, **OurBus** [expanded services](#) linking Amherst and Northampton, MA, to New York, previously available only during college breaks. The once-a-day service is now year-round, Thursday - Monday, and runs via Holyoke, CT.

Far fewer changes occurred on rural and seasonal leisure routes than in 2021. [A pilot](#) of the **Southern Maine Connector**, a local Saco – Springvale, ME, service offered by several local organizations to expand healthcare access, launched last year. Also, Vermont’s Tri-Valley Transit, a rural transit operator, [increased](#) Burlington – Middlebury, VT service. **Vermont Translines** continues its twice-daily Albany – Burlington service despite the launch of Amtrak’s new *Vermont* service.

Among the most notable developments regarding bus stations was Greyhound’s relocation from its longtime Erie, PA station. The massively complex project to build a new Port Authority Bus Terminal (with a separate wing for intercity trips) is progressing, though most construction is still years away. A rearrangement of the formerly mostly intercity-bus area on the lower level (south) has resulted in most of this area’s gates being used for commuter service. As long-range moves forward, traveler concerns about the current terminal’s physical upkeep and personal safety persist.

## MID-ATLANTIC STATES

The most notable shifts in this region during 2022 were a bevy of local-route changes in Pennsylvania and new options for New Jersey travelers. Relatively little happened on the busy New York – metropolitan Washington routes. All major bus lines serving that route before the pandemic, except BoltBus, are back, although service remains less

frequent in numerous cases. (Please see our special [2020 report](#) on the evolution of New York – Washington service over the past few decades.) Furthermore, as depicted on our [interactive map](#), all of the most well-known businesses- and first-class services are back, including **BestBus Prime**, **Vamoose Gold**, **Washington Deluxe Lux**, and a newer offering by **The Jet**.

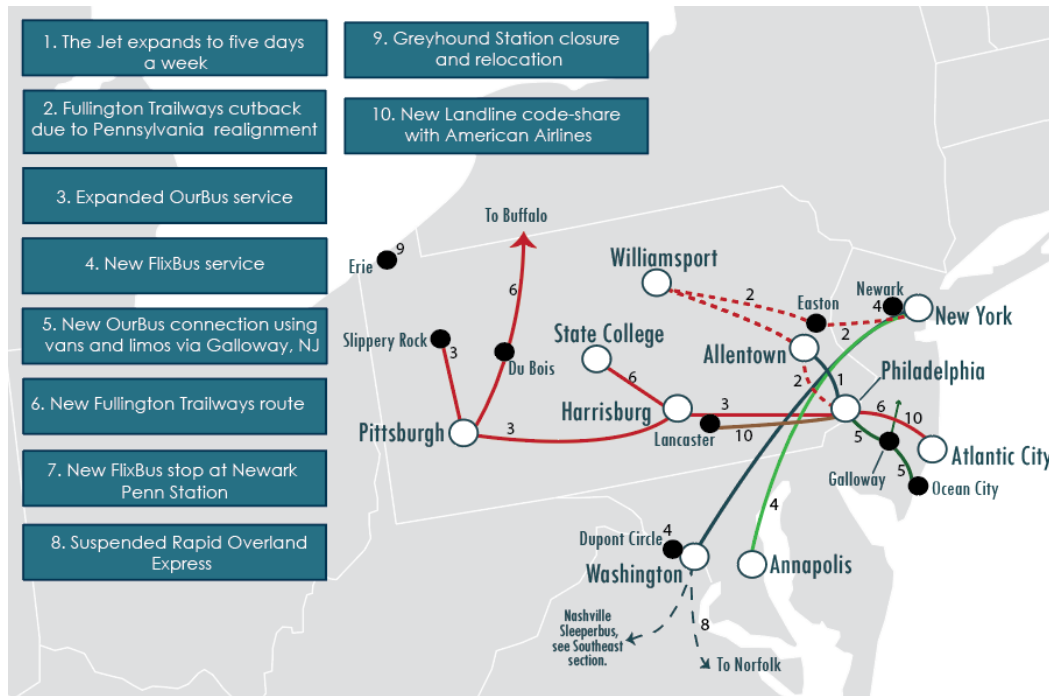
**FlixBus** made several notable moves last year, including [adding](#) New Jersey’s Newark Penn Station stops to specific New York - Washington - Richmond, VA trips. This station, a central hub for transit lines, provides a convenient alternative to FlixBus’s service from Midtown Manhattan. FlixBus also began using Greyhound’s dedicated gates at Washington Union Station, giving shelter and new amenities for passengers. For roughly a week in August, FlixBus offered trips on a battery-powered J4500 Charge coach between Philadelphia and

Washington, demonstrating the potential of emission-free bus travel. This 139-mile route didn’t present the "range anxiety" that might be prevalent using electric buses, which generally have a 200 – 240-mile range, on New York – Washington trips.

Apparently, in response to **Megabus’** pre-pandemic withdrawal from Annapolis, MD, **FlixBus** [launched service](#) from the colonial city’s downtown to Midtown Manhattan in early 2022. This service originally ran via Newark, DE, but by the end of the year, it was via Baltimore. FlixBus also [launched](#) a Washington Foggy Bottom service in early 2022 that was later suspended. Direct Foggy Bottom - Midtown Manhattan service hadn’t [previously been](#)

[available](#) since **Washington Deluxe** offered it in the early 2000s.

A realignment of state-subsidized routes made by Pennsylvania’s transportation department eliminated several local routes operated by **Fullington Trailways**, including ones from Williamsport and Easton, PA, to New York and Williamsport - Allentown – Philadelphia, PA. More favorably, **Megabus** began selling **Fullington’s** state-supported services on megabus.com in September,



adding nearly two dozen more destinations to its platform and continuing Megabus’s push to bring more state-funded services into its fold. In addition, Fullington, which is once again fully family-owned, began a new daily Buffalo, NY – Pittsburgh via DuBois service.<sup>5</sup> Separately, OurBus [launched](#) an intrastate State College – Harrisburg - King of Prussia - Philadelphia service, closing a gap resulting from the state realignment that is particularly beneficial to Philadelphia travelers, offering stops at both Center City and its international airport. Service continues eastward to Atlantic City, NJ, during the summer.

**The Jet**, a first-class bus service between New York and Washington, DC, that launched in 2021 has expanded from four to five days weekly, typically with two trips in each direction. The Jet’s spacious coaches are configured to 1x1 seating and have computer-aided motion-canceling “hoverseats” that allow for a smoother ride than conventional offerings. Fares are typically around \$99 - \$149 each way. A service attendant and a wet toilet are available.



A FlixBus service for Midtown Manhattan l s curbside in Washington’s DC Dupont Circle neighborhood on January 9, 2023.

**Landline** formed a partnership with **American Airlines** that spawned a “code-share” service between Philadelphia International Airport and regional airports in Allentown, PA, and Atlantic City, NJ. This service, launched in June, boasts through-ticketing and baggage service on buses bearing the airline’s familiar blue livery. Allentown has “airside” arrivals and departures (behind security) and groundside ones at Atlantic City. American Airlines has bona fide flights from Allentown, allowing passengers on some itineraries to depart on a flight and return by bus. In mid-August, Landline added a route from Lancaster, PA, to Philadelphia.

Landline expanded yet again last fall by taking over operations of the **United Airlines** shuttle between the Allentown Airport and Newark Liberty International Airport. This service, created several decades ago and dubbed “UA Bus Service,” has in

the past been provided using vans and offered airside (behind security) pick-up in Newark. There is groundside pickup in Allentown and drop-off in Newark, requiring flyers to go through security once they arrive.

**OurBus** introduced a novel system of first- and last-mile connections to the Jersey Shore during Memorial Day weekend. Passengers on coaches running between both New York and Philadelphia to Atlantic City can make timed connections at Galloway, NJ, to reach Wildwood, Ocean City, and other New Jersey locales. Transfers are made to car and limousine services that are locally operated with connections guaranteed by OurBus. Initially a weekend-only service, it has now been expanded to daily, with some locations being served year-round. Also, **OurBus** has enhanced a holiday-only route connecting the college town of Slippery Rock in northwest Pennsylvania to Pittsburgh, Harrisburg, Philadelphia, and New York into a year-round service. Available four times weekly, the service caters heavily to students while providing added frequency between Pennsylvania’s two largest cities and Midtown Manhattan.

The bus service network **near Canal Street (Chinatown)** remains robust. As of January 2023, it encompassed 14 ethnic-oriented carriers and 8,222 miles of routes, with a total of 93 stop locations, our

Carriers making notable moves in the MidAtlantic region in 2022

estimates suggest. Routes extend north to Buffalo, west to Indianapolis, IN, and south to Tampa, FL. Only 5% of stops are traditional bus terminals, while more than 60% are at retail stores or restaurants. Fares from New York tend to be lower than on conventional bus lines, with a median price difference of 38.7%. Check out our map and [informational poster](#) on this dynamic network in the Appendix.

**Virginia Breeze**, the intercity bus line supported by the Virginia Department of Transportation, remains a success story. All four of its routes [set ridership records](#) in October, carrying a combined 6,705 passengers, with service on most routes being one daily roundtrip. **Piedmont Express**, which links Danville, VA, to the nation’s capital, handled [1,887](#), an average of 63 per day, despite having only been in operation since 2020. The outlook is murkier for **Rapid Overland Express**, a business-class service between Norfolk, VA, and metropolitan Washington, DC, that was suspended during the pandemic and has yet to resume.



The Vonlane team during the first week of operation in Nashville, TN

## SOUTH AND SOUTHEAST

This region’s activities generated headlines due to the rollout of premium amenities and schedule options unavailable before the pandemic, a process fueled by the Sunbelt’s growing population. Another noteworthy development is mounting competition in Florida, which is now heavily served by four major lines: Flixbus, Greyhound, Megabus, and RedCoach.

**FlixBus** [launched service](#) to Tallahassee in July over two routes from Miami. One route generally runs six days per week via Ft. Lauderdale, Orlando, and Gainesville, FL, while the other runs five days per week via Sarasota, Tampa, and Gainesville. The Miami stop is at the city’s international airport, while Tallahassee’s is on the campus of Florida State University. FlixBus [also added](#) a Miami - Key West route via Key Largo last year.



A Southeast Stages coach has arrived in Atlanta, GA on December 31, 2022. The carrier’s service has been added to megabus.com.

**RedCoach**, the premium bus line known for its business- and first-class services from Miami to Tallahassee, also has separate routes via Orlando and Tampa. RedCoach notes that traffic is approaching pre-pandemic levels and it added Naples and Sarasota stops to its Tampa route last year.

**Vonlane** launched first-class Atlanta, GA - Nashville, TN service in early November, its first route east of the Mississippi River. Generally, there are three trips on weekdays in each direction and two on weekends, with fares around \$99 each way. An onboard attendant serves complimentary snacks, beverages, and meals on longer trips. Seats are wider than those on first-class flights, have leg rests, and generously recline. Neck pillows, sleeping eye masks, toiletries, laptop and phone chargers, and noise-canceling headphones



are available to borrow. Vonlane’s Atlanta stop is at the Grand Hyatt Atlanta in Buckhead, near the Buckhead rail rapid-transit station.



Travelers retrieve luggage from a sedan at Florida’s Tampa Greyhound Station FL on December 30, 2022.

One of the biggest stories in U.S. bus travel last year was **Napaway’s** launch of a Nashville - Washington DC “sleeperbus” in June. Travelers are provided “Butterfly Suites” that can be converted from a workspace with a desk to a 6.5-foot-long lie-flat bed. Pillows, blankets, a travel kit, and other amenities are provided to each. Its luxury coach, equipped with 18 suites, is generally operated once weekly in each direction, making late-evening departures and morning arrivals, but is twice weekly at certain times. Two drivers cover different portions of the 670+-mile route. Priced starting at \$125 each way, a **Napaway** trip is far less expensive than \$300+ “walk-up” airfares but comparable to a discounted advance-purchased ticket.



The late-in-the-year addition of a stop in Knoxville, TN, brought Napaway to a city that has long suffered from non-competitive air service. **CEO Daniel Aronov** described to our report-writing team how the patented suites, designed by Butterfly Flexible Seating Solutions, create exciting opportunities for luxury charters in which passengers want to sleep or rest. Extensive analysis led Aronov to choose the Tennessee route among dozens of possibilities, and



Atlanta's new Greyhound Bus facility being built with financial support from the state government.

expansion could be forthcoming.

A [new publicly funded bus service](#), **Mid-State Express**, has launched in North Carolina, connecting Winston-Salem to Fayetteville with stops in High Point, Lexington, and Asheboro. Operated by **Sunway Charters**, the service is made possible by financial support from the state's transportation department and is designed to connect with both **Amtrak** and local transit providers. Mid-State Express runs twice daily in each direction and, for some travelers, eliminates the need to make transfers with Greyhound.

**Southeast Stages**, a mainstay between Atlanta, GA, and Columbia, SC, Raleigh, NC, and other destinations in this region, has [a new marketing arrangement](#) with Megabus that puts its services on megabus.com. This brings to the booking platform new schedule options between Atlanta and 16 cities

and between Raleigh and eight cities. Southeast Stages, founded in 1933 and based in Atlanta, is a family-owned line that retains its distinctive branding.

An attractive new station **for Greyhound** is being constructed in Atlanta, GA, with financial support from Georgia's state government. This architecturally striking station, with eight bus bays, is adjacent to the legacy line's modular facility, which is both aging and undersized. Expected to open this year, it features a high ceiling, large windows, and proximity to rapid transit. It is expected to become a consolidated facility used by most of Atlanta's intercity operators. Less favorably, new reports indicate that Greyhound could be forced to relocate from its longstanding depots in Louisville, KY, and Nashville, TN because these sites are slated for redevelopment (see discussion on page 19).

**Groome Transportation** has [stepped up its shuttle services](#) linking Chattanooga, TN's East Ridge, to major airports in Atlanta and Nashville. It also added Montgomery, AL –

Atlanta airport service. Each route is more than 125 miles long, exemplifying how long-distance airport services are increasingly juxtaposed with conventional intercity bus routes. Finally, a new service called [Atlanta Beach Bus Express](#) linked its namesake city to Panama City, FL, during the summer season last year.

## MIDWEST AND CENTRAL

Activity in the Midwest was comparatively light in 2022, and service levels on many routes remain below pre-pandemic levels. **Flixbus** has partially filled a void left by **Megabus's** gradual dismantlement of its Chicago hub over the past seven years. In 2022, Megabus eliminated the last



Greyhound pauses at its Springfield, IL station, several months prior to the company's relocation to a downtown transit terminal.

of this service in this region by cutting its Chicago – Minneapolis/St. Paul route.

FlixBus expanded from Chicago last year, launching a service to Bloomington via Indianapolis that runs four days per week. Its Chicago - Detroit service runs five days per week, while its Twin Cities route via Madison, WI, runs daily except Wednesday.

FlixBus's longest route, its 450+-mile Columbus, OH - Chicago – Milwaukee, WI service, runs five days and is novel for being a “through” service that allows passengers to avoid transfers in the Windy City, a rarity by bus or train. Flixbus added a stop in April at Milwaukee's General Mitchell International Airport to expand these offerings, allowing for “one-seat” rides between the airport and Dayton, Indianapolis, and Columbus —while



avoiding airport security. Short-hop Chicago - Milwaukee passengers will usually find FlixBus's fares well below Amtrak's, although train service is faster and remains much more frequent, which appears to have slowed the recovery of bus service on the route.

FlixBus is also experimenting with other new stops, including Lafayette, IN, which was added last year to cater to Purdue University students, and Kalamazoo, MI, which was added to the Detroit schedule last year but soon suspended. Kalamazoo has long been an important point on the **Indian Trails** system, which continues to offer **Amtrak Thruway Bus** connections from that city.

Despite FlixBus's expansion, travel options on other busy corridors from Chicago remain modest against the backdrop of pre-pandemic service levels and comparably sized corridors in other regions.



A driver readies a coach for an afternoon departure at Detroit Greyhound Station in February 2023.

Between the Windy City and Cleveland, OH, Louisville, KY, St. Louis, MO, and Toledo, OH—once Megabus strongholds—direct express service is limited to Greyhound. Amtrak trains provide service on all but the Louisville route (which **Miller Transportation** serves with a less direct route), but the on-time performance of trains has recently

lagged. Between Chicago and Cincinnati, neither express bus service nor daytime train service is available. On the Chicago – St. Louis route, there is only Amtrak and Greyhound, with the latter having reduced direct service to two trips daily, one of which arrives at St. Louis well after midnight. On that route last year, **Greyhound began using** a transit center in Springfield, IL, allowing it to close its dedicated bus station on the periphery of that city. Conversely, service on the Chicago – Indianapolis route remains expansive and highly competitive. This route is extensively served by **FlixBus, Greyhound, OurBus, and Miller Transportation (Hoosier Ride)**, the latter of which, like **Barons Bus Lines**, is a Greyhound interline partner having routes fanning out into rural Indiana and Ohio, some operated with state financial support. OurBus launched service to Indianapolis following the 2019 demise of Amtrak's *Hoosier State* and recently expanded its peak-day service to two

roundtrips. Identifying all the options, however, requires visiting more than one website, and station and curbside facilities remain an issue. Last year, passengers expressed growing dissatisfaction with the condition of the city-run bus facility at Indianapolis Union Station, but improvements appear to be coming. In Chicago, FlixBus may need to make adjustments later this year when the curbside location it uses near Chicago Union Station becomes unavailable due to construction.

Other notable Midwest enhancements include Chicago – Fort Wayne, IN, which now sees four daily buses by **Barons** and **Miller**, filling a void left by Amtrak's absence. Also, **Tornado Bus** has launched a Chicago – Grand Rapids via Holland, MI route.

In the upper **Midwest**, the big story of 2022 was **Landline**, which continues to have a significant “code-share” operation at Minneapolis-St. Paul International Airport with **Sun Country Airlines**. Unlike Landline's services for other airlines at

Philadelphia and Denver, its routes to Duluth and Mankato, MN, launched in 2019, have Landline rather than airline insignia and can be booked by travelers not catching designated flights. In December, Landline [created new services](#) from the Minneapolis airport to **Rochester, MN**, home to the Mayo Clinic, and Fargo, ND, which launched last month. The Rochester route runs twice daily and is only available to passengers of Sun Country, which is absorbing the costs for the first six months. **Groome Transportation**, meanwhile, began a conventional airport shuttle service last year on the Duluth route that competes with Landline.

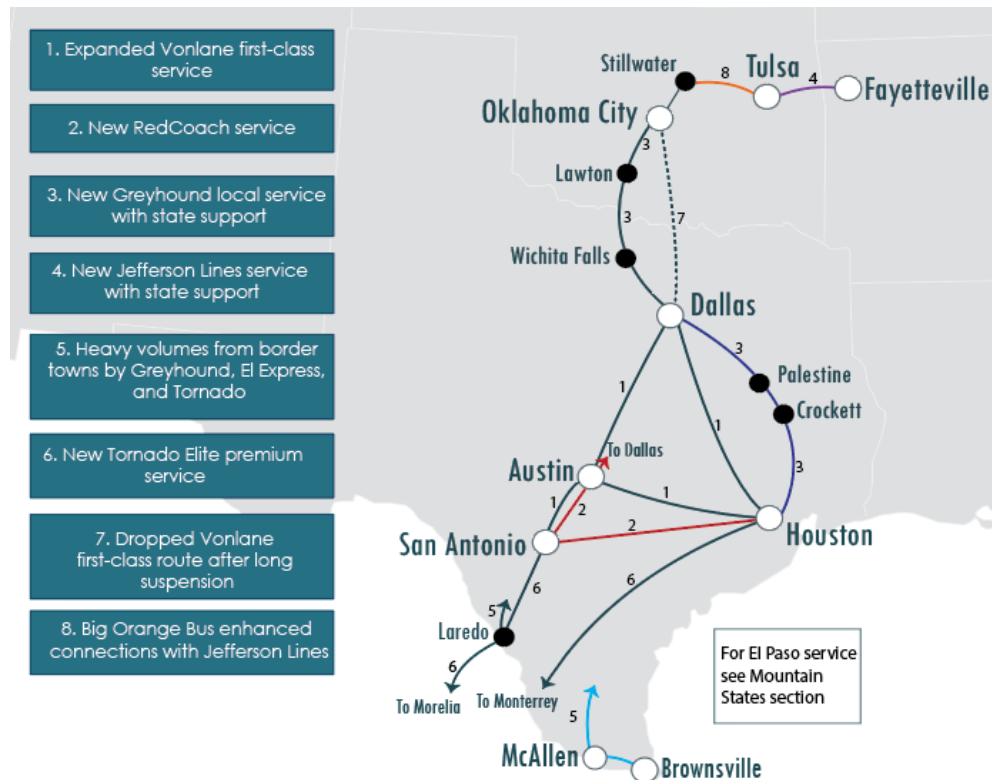
**Badger Bus** is running double-decker coaches with 81 seats on some Madison, WI – Milwaukee trips. Using such high-capacity equipment attests to the strength of the market linking Milwaukee to the University of Wisconsin-Madison campus and state capital, which is also served by **FlixBus** and Coach USA’s **Wisconsin Coach Lines** but will require extensive investment before becoming an Amtrak train route.<sup>6</sup> As noted in last year’s report, Wisconsin Coach Lines now operates a

comprehensive system of state-supported local routes in the state. **Jefferson Lines** held a demonstration of battery-power motor coaches in Minneapolis in August. The rollout included a 52-passenger Van Hool vehicle with a 250-mile range on a “Zero Emission Tour.”

The **Cincinnati Greyhound Station** has been shuttered to make room for the development spurred

by the adjacent Hard Rock Casino. **Greyhound and Barons Bus** have moved to a temporary, more outlying location on Galbraith Road near Interstate 75. The now-closed depot was located downtown, close to the city’s transit hubs, and was notable for having bus bays on two sides. There is hope that a new Cincinnati station with an indoor waiting area will be built on the new site.

**Jefferson Lines** has forged an [interline agreement](#) with **Standing Rock Public Transit** that allows its passengers to book travel to numerous municipal and tribal points in the Dakotas, including Gettysburg, McLaughlin, Mobridge, SD, and Fort Yates, ND. Jefferson also [received a Business Traveler’s Favorite](#) Award last year from **wanderu.com** for exemplary service. Finally, Jefferson and **Burlington Trailways** were each [awarded funds](#) from the State of Iowa to support their rural services.



## TEXAS AND OKLAHOMA

Texas has emerged as a testbed for premium service, with three companies, **RedCoach**, **Tornado**, and **Vonlane**, making notable moves in 2022. This trio competes with the value-priced national brands FlixBus, Greyhound, and Megabus, as well as the Hispanic-oriented lines **El Expresso** and **Tornado Bus**, which are under common ownership. Each of the above eight lines also has extensive Lone Star State networks.

Texas also stands out because of its intensive activity in **the U.S./Mexico border region**. Prominent border towns, most notably Brownsville, El Paso, Laredo, and McAllen, TX, each reportedly saw traffic expand in the latter part of the year. However, the extent of this expansion is difficult to quantify due to the lack of published information. On a

typical day, travelers can travel from McAllen to Houston or San Antonio on Greyhound, El Expresso, Tornado Bus, and numerous other Hispanic operators that don't appear on major reservation sites. Travelers from Laredo can choose from several providers. Extra sections are sometimes operated to meet the demand.

El Expresso and Tornado's services should not be confused with the modest offerings provided by some bus lines across the Mexico border. Tornado Bus boasts **double-decker Volvo buses** on many routes. In November, it took the surprising step of launching **Tornado Elite**, a premium service for those traveling in the U.S./Mexico border region using the double-deckers. Its enhanced economy seats have seatback screens, foot and leg rests, and generously

recline. Each coach has two restrooms. Tornado Elite is available on the Dallas – San Antonio – Guadalajara, MX route. This YouTube video [touts](#) Elite's amenities.

**Tornado Bus** is reportedly seeing a surge in traffic from El Paso, TX, due to a rise in crossings along the U.S./Mexico border. Even so, the role of scheduled bus lines in relieving the humanitarian issues at the border is attracting far less attention than in 2021. Meanwhile, chartered motor coaches carrying immigrants, which have operated as far north as

Chicago and New York, have commanded much press coverage. For recent coverage on demand for Tornado Bus service in El Paso, click [here](#).

Elsewhere in Texas, first-class operator **Vonlane**, which has onboard attendants serving snacks and drinks, has

expanded in the Texas Triangle. The carrier added two departures in each direction on peak travel days on its busiest routes. Vonlane now offers eight peak-day departures from Dallas to Austin and Houston and six from Austin to Houston. It also offers a pair of trips in each direction between Fort Worth and both Austin and Houston. Vonlane no longer offers Oklahoma City service, suspended during the pandemic.

**RedCoach**, which made its first foray outside of the Southeast in late 2021 by introducing first- and business-class service between Austin, Dallas, and Houston, TX. Both this carrier and Vonlane added San Antonio service in recent months. Efforts for



Dallas Greyhound Station, shown in early 2022, is a stop on the carrier's new Oklahoma City – Houston service, which also serves numerous smaller cities.

high-speed rail service continue but remain years away.<sup>7</sup>

In September, Greyhound launched a local route connecting Oklahoma City to Houston via Dallas. This route has numerous other stops, including Chickasha and Lawton, OK, Archer City, Milbank, and Palestine, TX, that otherwise lack attractive mobility options. Operated with financial support from the State of Texas, it follows a less direct route than express services to close gaps in the bus service.



A Bustang coach, on a Denver - Fort Collin, CO run, pauses at Loveland in August 2022. This stop is at a local park-and-ride transit facility.

With the assistance of the Oklahoma state government, Jefferson Lines has launched a service between Fayetteville, AR, and Tulsa that caters to students and staff at an Oklahoma State University campus in the latter city. This is also designed to facilitate connections with the Big Orange Bus, a campus-oriented line linking OSU’s main campus to the Tulsa campus.

## MOUNTAIN

This region saw much more expansion with Bustang, Colorado’s primary provider of intrastate long-distance bus service, and another round of initiatives by Salt Lake Express in Idaho and Utah that build upon similar moves in 2021.

Colorado doubled down on long-distance bus travel by investing heavily in Bustang, a unit of the state’s transportation department. Not only was regular Bustang service added, but Bustang Outrider, which involves smaller buses with around 35 seats, and Bustang Pegasus, which includes vans, grew as well. Outrider’s primary objective is to enhance travel between rural communities and the state’s larger cities and towns with convenient connections and consistent fares. Unlike some rural transit operators, Bustang tends to focus on inter-urban needs.

At the start of last summer, Bustang ran four daily round trips on its West Line from Denver, with one running to Grand Junction, the line’s terminus. Traffic on this busy “I-70” corridor service had reached 136% of pre-pandemic levels by last March. Since then, it has added two more round trips to Grand Junction, and in 2023, it reportedly will expand to 9–10 daily trips, all to Grand Junction. By 2024, there will be 13-15 daily. The state has allocated \$30 million for the pilot, which includes the cost of purchasing more buses and covering the operating expenses of Bustang’s private contractors.

In the South and North Lines linking Denver to Colorado Springs and Fort Collins, respectively—



A Landline coach with the United Airlines livery at Northern Colorado Regional Airport will soon depart for Denver’s airport.



services that tend to be more commuter-focused—traffic is still down considerably, but a gradual recovery is reportedly afoot. Bustang added two more trips in each direction on these routes on weekdays, from six to eight round trips, late last year, while keeping weekend trips at two. This year, the number will grow to 10 roundtrips on weekdays and four on weekends, with several more roundtrips added in 2024.


In November, the state launched a new Bustang Outrider service between Sterling and other points in northeastern Colorado and the populous Front Range region. The new offering, which runs weekdays only, has two variants, one running to Denver and another to Greeley, CO, each operating on alternate days, with Fort Morgan and Wiggins among the regular stops on both routes, with other stops being made on request.

**Bustang** travelers had fare-free transit connections on local public transit services in August **and half-price fares** on intercity trips that month, made



possible by a state government appropriation. All but a few of the state’s public bus operators participated, with the exceptions mostly involving agencies’ concerns that the lack of drivers would hamper their ability to meet the demand.

Also in the Centennial State, **Landline** expanded its “code-share” service with **United Airlines**, including through-ticketing, airline-style boarding passes, and checked baggage. One Landline route links Denver International Airport to the Northern Colorado Regional Airport in the Fort Collins/Loveland area, which is currently bereft of scheduled flights. In late 2022, the service was expanded from four to five daily trips and made available to those who were not catching

United flights. This route, at just 58 miles, is too short for scheduled air service, making this motor coach offering more about convenience than eliminating flights. Passengers pass through security after arriving at DIA, but on the return journey, they board the coach airside (i.e., behind security) at a gate in the regional concourse that mirrors those for

# LANDLINE

Carriers making notable moves in the Mountain States in 2021

flights. A similar wintertime service continues between DIA and the Breckenridge, CO, ski resort.

Farther west, **Salt Lake Express** has launched a direct Boise - Salt Lake City route, eliminating the need for transfers at Pocatello, ID. The service replaces a newly discontinued Greyhound route and includes stops in Twin Falls, ID, Brigham City, UT, and Ogden, UT. The move marks a continuation of Salt Lake Express’s robust expansion, as exemplified by several other recent additions of state-supported services noted in our *2022 Outlook* report. In 2022, Salt Lake Express also added a local route to Reno, which we describe in the next section.

Salt Lake Express has also made several significant corporate moves while maintaining its partnership with FlixBus. Last year, it acquired

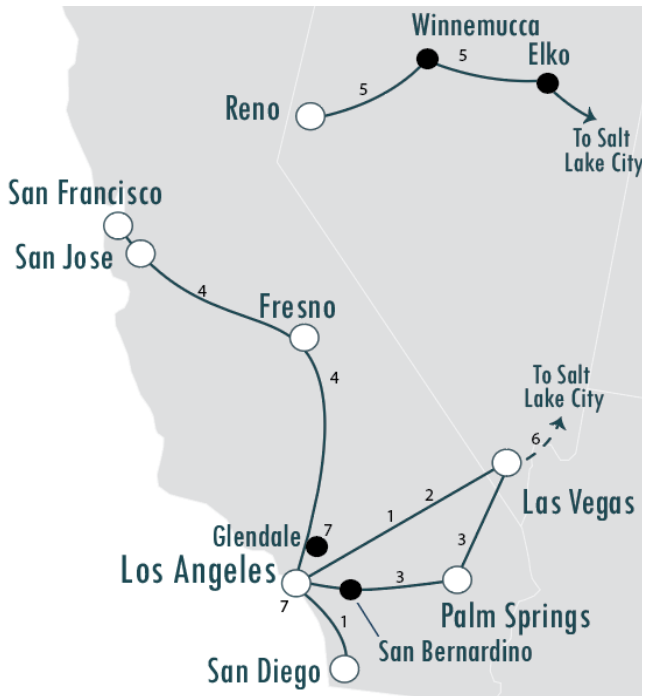
**Northwest Trailways**, a significant development we discuss in the Pacific Northwest section. Its role has been boosted by **Greyhound’s** elimination of the Salt Lake City - Las Vegas, NV service, a route that ran via Provo and St. George, UT, last year. Greyhound’s withdrawal may stem from FlixBus’s decision to put Salt Lake Express services on this route on both [flixbus.com](https://www.flixbus.com) and [greyhound.com](https://www.greyhound.com).

In 2024, daylight luxury train service **American Rocky Mountaineer** expects to add a Colorado – Provo – Las Vegas service to its existing Denver – Moab UT offering. It is unclear whether the “scenic motorcoach sightseeing transfer” between Moab and Salt Lake City will continue after this.

**El Paso - Los Angeles Limousine**, a prominent

Hispanic line referred to as “Limousine Express,” added a third daily trip between the Texas border town and Denver, CO, via Albuquerque, NM. Traffic is apparently brisk, considering that it only added its second departure on this route in 2021. The service is likely a response to the surge in border crossings in this region, with El Paso acting as a significant

1. New Kolors service
2. New LuxExpress service
3. Addition of Palm Springs to LA – Las Vegas route
4. FlixBus frequency now five buses daily
5. New Salt Lake Express route with state financial support
6. Dropped Greyhound route. Salt Lake Express service added to [greyhound.com](https://www.greyhound.com)
7. Greyhound station closure and relocation



gateway to inland and northern cities.

## THE SOUTHWEST

Much of the activity in this region centered on Las Vegas, NV, which has seen tourism almost entirely bounce back from the pandemic. Several new players have entered the busy Los Angeles–Las Vegas corridor. Meanwhile, the Los Angeles – San Francisco Bay Area route continues to lack significant competitive entry. FlixBus and Greyhound remain dominant, despite this being one of the country’s busiest corridors.

A notable development for Las Vegas is the debut of **Kolors**, which bills itself as a “smart bus platform.” The Mexico City-based company launched its San Diego, CA—Los Angeles—Las Vegas service in



December, typically with two trips in each direction. Riders are promised a “premium economy travel experience” differentiated from competitors with shopping centers and hotels as bus stops rather than terminals or curbs. Like FlixBus (prior to its parent’s purchase of Greyhound) and OurBus, Kolors does not own or operate buses and instead partners with local bus companies. Over the past year, Kolor has reportedly raised more than \$20 million in investment and expanded its market share on several intra-Mexico routes. We expect more announcements from Kolor in the coming months.

Another hotel-oriented service, **LuxXpress**, has also entered the downtown Los Angeles - Las Vegas fray while making stops at Anaheim, CA, and several other points. Its Mercedes Sprinter vans make the trip in 4.5 to 5 hours, twice daily in each direction. LuxXpress is part of a growing set of hybrid lines, like **Groome Transportation**, that possesses some of the qualities of an airport shuttle, with some stops at hotels, but also has broad appeal to non-flyers. Fares are typically around \$65, often above a conventional bus ticket.

Another notable Las Vegas development involves **FlixBus**, which began offering a direct connection between Coachella Valley and the gaming center in August, from Friday through Monday, by making Palm Springs a stop on its Los Angeles – Las Vegas route. Eliminating the need for transfers shortens the trip by as much as four hours and allows for “one-seat rides” to Victorville, Riverside, and San Bernardino, CA. However, a tradeoff is the additional time for passengers not using the new stop.

**FlixBus** and **Greyhound**—remarkably--remain the only options on prominent reservation sites between the metropolitan Los Angeles and San Francisco regions. The distance, topography, and diverse

origins and destinations in the Bay Area and the Los Angeles Basin (which, combined, have eight major airports) make it hard for bus providers to serve any submarket with high frequency. Attempts at overnight sleeper services seem to have vanished a few years ago with the demise of **Cabin**. While there are multiple train departures, most require transfers to or from a bus in Bakersfield. High-speed rail, meanwhile, remains controversial, with construction progressing but limited to the Central Valley area.

On this 380+ mile route, FlixBus now has more trips than Greyhound, with five daily trips each way this April compared to Greyhound’s four. Smaller Hispanic operators also offer service but do not use major reservation platforms.



A promotional image appearing on the Kolors Bus web page (kolors.com) that promotes its Los Angeles - Las Vegas service

A big story in Southern California was Greyhound vacating the longstanding **Los Angeles Greyhound Station** on 7th St. in October in favor of a facility at that city’s Union Station. Once one of the busiest stations on its system, the facility’s condition had declined, becoming oversized due to Greyhound’s gradual service reductions. It became harder to maintain and less of a revenue generator due to the shifting center of gravity of central Los Angeles. Even so, the shuttered depot is perhaps the most notable Greyhound station to be closed since the carrier exited its relatively new (by bus industry standards) Portland (OR) Greyhound Station in 2019. A significant benefit of the Los Angeles Union Station (LUS) location is its greater synergy with the region’s vast public transit system. Another benefit of the new station location, which is in the Patsaouris bus area, is the service amenities and rail and bus connections. However, reports have been made that LUS’s historic and comfortable waiting room is closed to bus passengers. Greyhound also relocated last year from its

traditional Glendale, CA station for a spot at the community's intermodal center, which is also served by rail.

The shuttering of these facilities is part of a series of station closing that has dramatically changed the West Coast's conventional bus network (see discussion on page 19). In 2021, Greyhound moved out of its longtime station in Bakersville, CA, which was [demolished last year](#), in favor of an intermodal facility. Greyhound operates from the Transbay Terminal in San Francisco.

**Salt Lake Express** added, with financial support from the state of Nevada, a local Reno – Salt Lake City via Elko route last year, building on last year's Silver State expansion. Greyhound exited this route several years ago when it dropped Salt Lake City – San Francisco-area service in favor of offering connections to Amtrak's **California Zephyr**.

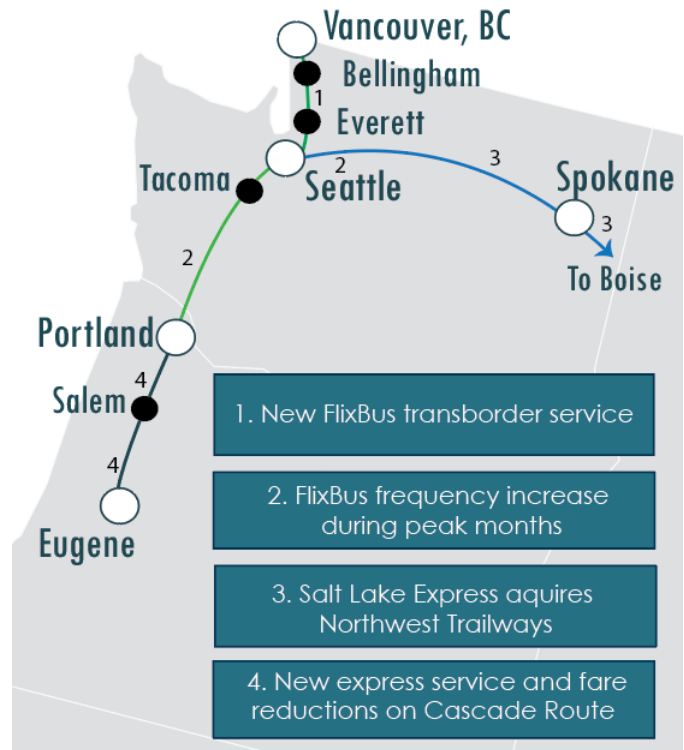
The Golden State remains a national leader in the push to have rural bus-service providers accept contactless payment, including credit cards, and make digital schedules (GTFS feed) available to support trip planning. The California Integrated Travel Project is leading this effort.

## THE PACIFIC NORTHWEST

Moves by FlixBus were among the Pacific Northwest's most prominent stories last year. However, an enhancement to the region's expansive network of state-supported bus services also warrants mention.

FlixBus [began its long-anticipated cross-border](#) service between Seattle and Vancouver, BC, in June. Passengers were transported on a fully electric Van Hool TDX25E over the 143-mile route for several days in June. Three or four trips generally run in each direction, with selected runs [extending south](#) to Portland, OR. FlixBus has also expanded its Seattle – Portland service to five trips daily during peak months, one more than Amtrak currently offers.

**Northwest Stage Lines**, a fixture in the Boise, ID – Spokane, WA – Seattle corridor, was acquired by Salt Lake Express in October, adding more than 25 destinations to the **Salt Lake Express** (SLE) system. The acquisition has the potential to create a



continuous single-carrier service between Salt Lake City and the Pacific Northwest. Northwest Stages, a Trailways affiliate and longtime Greyhound interline partner is now being sold on its new owner's platform under the SLE name.

Last year, Oregon's transportation department [began experimenting](#) with reduced fares and new schedules on the Cascade Route bus line linking Eugene and Portland. Four trips are generally made daily in each direction. Fares were cut roughly 15%, bringing down the cost of a Eugene – Portland trip to \$19, and new express schedules were also introduced.

## TRENDS & PROGNASTICATIONS

The developments of 2022 set the stage for these five conclusions and prognostications:

**Prediction 1: FlixBus and Greyhound will continue their push to assimilate their networks, made possible by a new reservation platform and more technology-sharing. The integration will allow travelers to make connections between each other’s buses on a single ticket and bring more stations and stops into closer proximity, with particular emphasis on public transit hubs. The transition will require devoting much attention to customer care.**

The expectations we expressed in our *2022 Outlook* report that FlixBus and Greyhound would keep separate stations and distribution channels for several years on account of their differing branding, marketing practices, and customer bases were off the mark. By summer, many FlixBus routes throughout the West Coast, particularly those involving Los Angeles and the Pacific Northwest, were being sold on [greyhound.com](https://www.greyhound.com). Adding FlixBus



The ticket window at the Tampa Greyhound Station in late 2022. Non-transportation entities now own many Greyhound stations.

routes to [greyhound.com](https://www.greyhound.com) accelerated in autumn until most of its North American network was on that platform. The integration appears motivated by a desire to build synergy and give [greyhound.com](https://www.greyhound.com) users new travel options, which in many instances include more desirable boarding locations in downtown areas of cities than Greyhound. Early this year, Greyhound routes were added to [flixbus.com](https://www.flixbus.com).

Also significant is FlixBus’s creation of a new reservation platform for FlixBus, Greyhound, and Greyhound’s many interline partners. This will replace the TRIPS system, which has long been a Greyhound mainstay. This new system, which is “live” for travel starting on February 22, 2023, enhances the ability of Greyhound and other carriers to manage their seat inventory and offer conveniences previously available only to FlixBus riders. For Greyhound customers, this includes:

- **Having all seats be reserved**, with priority seats available for a small fee and other seats automatically generated, much like an airline.
- **Providing an option to travel “neighbor free”** (next to an empty seat) for a fee.
- **Providing an option to pay a modest fee for carbon-emission** offsets,
- An **easier process to change** your ticket, and
- New and more **restrictive baggage rules**, which appear to be partly intended to speed up station stops

We also expect much of FlixBus’s technical capabilities, such as its online tools to assist customers and its passenger-management systems, to be increasingly used for Greyhound.

In addition, **we expect connections between Greyhound and FlixBus to be increasingly sold as a single “through ticket,”** which will multiply the number of schedule options provided on some routes. Merging the FlixBus and Greyhound systems in this way will require devoting much attention to customer care and dealing with their differing



To review our Interactive Map of Premium Service, [click here](#)

service standards. Training Greyhound drivers to gently but firmly enforce the reserved seat policy will require effort and persistence.

Amid the transition, Greyhound’s expansive interline agreements, which offer “through” ticketing with several dozen other carriers, are poised to continue. However, some notable details, such as whether (or how soon) these partners will offer reserved seating, remain to be seen. Over time, it is possible that the expectations of interline partners will change, considering FlixBus’s emphasis on presenting a strong and consistent brand image to consumers.

The integration will also emphasize using common stations and curbside stops. FlixBus now uses Greyhound’s dedicated gates at Washington Union Station, for example. When Greyhound relocates a station, it often moves to the same location as FlixBus. Watch for further development in our forthcoming *Intercity Bus E-News* reports.

**Prediction 2: Over the next 18 months, premium bus services will spread to regions lacking such service, including Arizona, the Heartland, and the Pacific Northwest. This expansion, in some cases, will be spurred by the growing popularity of long-distance airport shuttle services,**

**which give travelers a taste of the conveniences of ground-travel options while sidestepping the hassle of flying.**

The rapid expansion of the business- and first-class services is among the most heavily publicized trends in intercity bus travel. On our **Interactive Map of Premium Bus Services**, we showcase ten brands that operate in this sector. [Click here to see the map](#) and some of the notable features of their routes. We define premium services as those providing more spacious seating than regular buses, onboard food or beverage service, service attendants, and through-baggage service with commercial airlines. A provider must meet one or more of these criteria to achieve quality. By mid-2024, we expect the availability of premium service to spread more broadly throughout the country.

**Prediction 3: Greyhound will relocate— involuntarily in some cases—from several more prominent stations by late 2023, creating a worsening predicament for the interline bus network. Municipal officials dealing with the consequences will face pressure to intervene and turn to state and federal agencies to assist in finding safe and comfortable places for passengers to wait.**

Gradually over the past several decades, many bus lines have moved from traditional bus stations to intermodal transportation centers, Amtrak stations, convenience stores, transit hubs, curbside spots, or in rare instances, airports. The loss of amenities has been problematic for those making transfers late at night or early in the morning, with lengthy layovers, or during inclement weather. The burden is particularly felt by disadvantaged groups who depend heavily on bus travel. When indoor waiting facilities become unavailable, bus lines are sometimes forced to discontinue selling tickets that

require transfers at those points, which diminishes the scope and quality of the national bus network.

The problem of finding or maintaining stations is rapidly intensifying. In 2022, Greyhound relocated from its longstanding stations in Charlottesville, VA; Cincinnati, OH; Erie, PA; Jackson, MS; Knoxville, TN; Los Angeles, CA; and North Little Rock, AK. While

owned by FirstGroup, Greyhound’s previous owner after that bus company was sold to FlixBus in late 2019. In 2022, FirstGroup acted on its desire to divest itself of its North American assets by selling many stations to other parties. This sale has caused the timetable for the redevelopment of the properties for other uses to accelerate significantly.



A driver assists travelers bound for Orlando at FlixBus’s curbside spot in Tampa, FL on December 30, 2022. A Tallahassee service became available from this location earlier in the year.

some relocations, such as in Los Angeles, brought these buses to a more centralized and desirable location, others placed the new stops far from city centers. In [Charlottesville](#), [Jackson](#), Knoxville, and North Little Rock, the relocations sparked a public outcry due to the loss of indoor waiting rooms and the unappealing nature of the new locations. Recently, there have been reports that Greyhound stations in Cleveland, OH; Houston, TX; Kansas City, MO; Louisville, KY; and Nashville, TN, are at risk.

The growing difficulty of providing passengers with indoor waiting areas and other needed amenities has been magnified by the fact that ownership of many stations now rests with real estate firms. Most privately run Greyhound stations continued to be

The problem is being exacerbated by what some regard as a loophole in federal regulation requiring government units to provide “reasonable access” to intercity bus lines at public-transit facilities. These transit hubs are often well-maintained and centrally located and have security protocols to keep passengers safe. Many have heated and air-conditioned waiting areas. The regulation does not, however, stipulate the fees governmental units charge for the use of these facilities. The monetary payments local governments demand from privately run bus lines to move into and use these hubs are often prohibitive. Some officials justify their demands out of a desire to

refrain from subsidizing a private business. As the crisis escalates, many connecting points are being lost.

At a minimum, bus lines will need to educate travelers about the absence of amenities, particularly indoor waiting areas, on trips involving transfers—and be transparent about this when displaying search results. Even then, invariably, the loss of these waiting areas will create serious difficulties for some, particularly travelers with only modest financial resources, including immigrants.

These concerns are being magnified by concerns about passenger safety and the need for orderliness at many curbside stops. Some are marred by litter,

graffiti, deteriorating sidewalks, and long distances from retail businesses. Numerous stops and brick-and-mortar stations suffer from the homeless epidemic and, as one consultant noted, “from the unspoken feeling by some in political circles that only ‘those people’ ride intercity buses and they are not *our* constituents.”<sup>8</sup>

Unfortunately, the problems this creates have yet to attract much attention from local policymakers, some of whom have done little to help travelers on intercity buses in the past. However, we expect municipal and state governments to face growing pressure to find long-term solutions. More cities will be provided the impetus to follow the example of Boston, MA, Denver, CO, Raleigh, NC, and Washington, DC, by creating consolidated and centrally located facilities that handle most local arrivals and departures.

**Prediction 4: Intercity bus ridership will reach 80-85% of pre-pandemic levels by late 2023. Although the recovery will be nearly complete in the Sunbelt, sluggish demand in slow-growing regions, including the Midwest and Northeast, could trigger service cuts on secondary routes, putting pressure on state governments to intervene. Driver shortages could thwart the recovery.**

The void in publicly available data on intercity bus ridership makes forecasting difficult. To fill the gap, we reached out to industry officials to gain insights on ridership status. The results suggest that, in the Sunbelt, including Arizona, Florida, the Deep South, and Texas, traffic has fully (or almost entirely) recovered. Passenger boardings at the U.S.-Mexico border seem to be above pre-pandemic levels.

Passenger traffic appears to be around 75% of pre-pandemic volumes in the Great Plains and the Midwest. In California, New England, the Mid-Atlantic region, and the Pacific Northwest, traffic is



Passengers disembark at Chicago Greyhound station on a chilly February 2023 evening. A Burlington Trailways coach is in the distance.

perhaps around 65-75%. (The above estimates do not include commuter services, some of which are below 50%.)

The recovery is slowed by the difficulty of restoring all the services cut during the pandemic due to labor and equipment shortages. **More favorably, however, there are more paying customers per coach departure on many routes than before the pandemic** due to the demand for seats outpacing the supply, resulting in many peak-period departures being sold out. The speed of the recovery depends on the industry’s ability to resolve driver shortages, improve perceptions of service quality and personal safety, and adjust the ever-changing expectations of post-pandemic travelers.

These issues and regional differences aside, we expect traffic in the lower 48 states to reach around 80-85% of pre-pandemic levels by late 2023. This goal may prove unattainable if severe driver shortages persist through summer. The “new normal” will likely result in permanent service cutbacks on numerous marginal routes as equipment ages and operating costs escalate.

**Prediction 5. How bus lines use prominent reservation platforms will continue to change in frenetic ways in response to new marketing alliances and a desire to expand customer awareness. The changes will create consumer confusion in the near term but spread awareness of bus-travel options over the long term.**

Unlike nearly all airlines and Amtrak services, it can be difficult for consumers to assess all the available bus services on a route, even with a well-planned search. Indeed, customers taking the time to review three or four different websites may miss certain bus-travel options and need clarification on the different portrayals of the same options on multiple websites.

More favorably, the preponderance of bus tickets is sold on a handful of reservation platforms. This includes greyhound.com, flixbus.com, and megabus.com, which are managed by business units affiliated with Greyhound Lines, FlixBus, and Megabus/Coach USA, respectively, and booking aggregator sites, such as **busbud.com** and **wanderu.com**, and **llikebus.com**. The latter three platforms and others serve roles in bus travel akin to Expedia's in air travel. All use sophisticated marketing strategies and have extensive customer databases.

How bus lines use these platforms evolved rapidly in 2022. These changes make clear that reservation platforms have become a competitive battleground. Until recently, intercity bus lines tended to appear on only one of the above three platforms managed by bus companies. This changed in 2022 when FlixBus gradually put most of its North American service on greyhound.com, in addition to having it on flixbus.com. Then, last month, Greyhound was added to flixbus.com. **Adirondack Trailways**,

**Fullington Trailways**, **Miller Transportation**, and **Southwest Stages**, all past or present Greyhound interline partners, forged relationships with **Coach USA** to have their services on **megabus.com**. However, the latter two continue also to be sold on greyhound.com. The megabus.com platform is experiencing a revival as bus lines seek to tap into Megabus' wide brand recognition and vast customer database.

Meanwhile, "booking aggregator" platforms are releasing new features and continue to be vital for service providers not sold on any of the above three bus-line affiliated sites. **OurBus**, **GoBuses**, **Tornado**, **Vamoose**, and **Washington Deluxe** are among the many brands that use aggregator platforms but do



A RedCoach bus at the carrier's Orlando, FL, station depicts a passenger doing work *en route*.

not appear on any of the three carrier-managed sites. We expect more lines to appear on these sites in the months ahead.

Although less prominent on the national travel scene, rural and tribal operators that have in the past mainly relied on cash payments, prepaid fare cards, and printed schedules will gravitate toward online booking platforms. **The Rural Transit Assistance Program (RTAP)** is helping many create the digital (GTFS) schedule feeds needed to enhance their visibility among travelers.

These noteworthy changes set the stage for a time of significant disruption. In addition to the above

prognostications, we expect the **Bipartisan Infrastructure Bill** passed in 2021 to increasingly benefit the industry, thanks to the intensive advocacy work of industry trade groups such as the **American Bus Association** and the **United Motorcoach Association**. In addition, although 2022 saw relatively few rollouts of the new **Amtrak Thruway Bus** service, the network is poised to grow. However, the extent to which rail passenger improvement hurts intercity bus travel is hard to

predict, considering that bus and train services tend to be complementary in some cases but not in others. ■

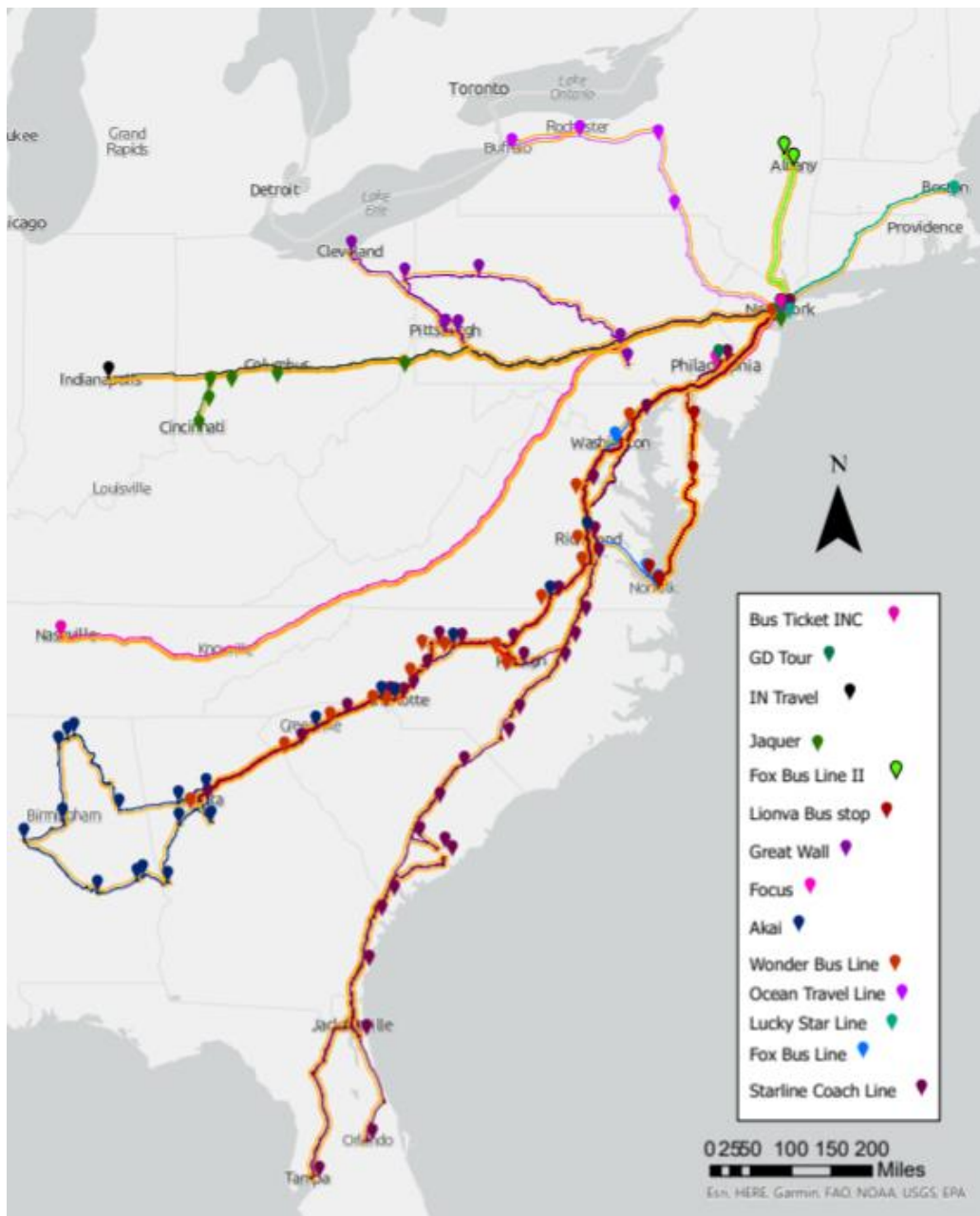
The study team invites readers to a free webinar on this study on Thursday, February 23, 2023, from 2 – 2:50 pm CT. [Click here to register.](#)



## APPENDIX: CARRIERS OPERATING FROM THE VICINITY OF NEW YORK'S CANAL STREET (CHINATOWN), JANUARY 2023

An extensive network of bus lines once again operates from the vicinity of Canal Street within or near New York's Chinatown neighborhood, providing a wide array of neighborhood-based services from Midtown Manhattan. The map shows carriers operating from this neighborhood that sells their tickets on gotobus.com, ilikebus.com, or busbuster.com. Some market their services under different names on different websites. One notable change since early 2022 is a shift in Lucky Star's reservation platform to flixbus.com.

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



Map by Borja Gonzalez Morgado, Chaddick Institute

## AUTHOR INFORMATION



**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 Transportation Research Forum. He is widely published on intercity bus and rail travel.



**ABBY MADER** is the program manager for the Chaddick Institute and a graduate student in the Sustainable Urban Development program at DePaul University. Before her time at DePaul, Abby obtained her bachelor's degree in Environmental Science from the University of Wisconsin at Green Bay. Abby is the principal cartographer for this *Outlook* report, edits the bus-travel [E-News](#) releases, and is keeper of the Chaddick Institute's Intercity Bus Listserv.



**ALLISON WOODWARD** is a research associate at the Chaddick Institute and a graduate student in the International Public Service program at DePaul University. She earned her bachelor's degree in Public Policy and Communications from Auburn University. Before joining the university, Allison served in the peace corps in the West African country of Benin. Allison helped write this *Outlook* report and oversaw the research of carriers providing service from the vicinity of Canal Street in New York.

**ASSISTING CONTRIBUTORS: MICHAEL R. WEINMAN AND PATRICIA CHEMKA SPERANZA OF PTSI TRANSPORTATION**  
**TECHNICAL CONTRIBUTOR: BRIAN ANTOLIN, COTO TRAVEL**

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*The Chaddick Institute team took and provided all photos in this report.*

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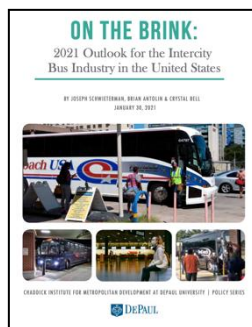
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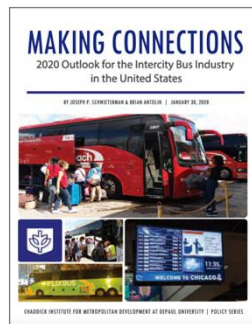
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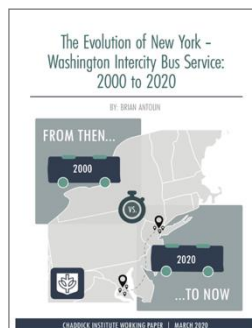
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<sup>1</sup> The practice of allowing passengers to freely switch between carriers without a fee after a ticket was purchased appears not to have been common in recent years.

<sup>2</sup> Lucky Star is among the brands that was cleared to resume operations after the Federal crackdown of some lines offering service from the Chinatown area in 2012. The resumption is discussed in this Boston Globe article [here](#).

<sup>3</sup> Certain OurBus options notes that trips on that brand may involve a minibus transfer at Buffalo, NY. OurBus Toronto – New York service also is shown on schedules as terminating at George Washington Bridge station.

<sup>4</sup> The announcement of the winter suspension and March restoration was posted at this link by Mehagan Sun: [Domestic Line Run Buses | Getting Here | Mohegan Sun](#)

<sup>5</sup> For details on its renewed status as fully family owned line, visit [About Us - Fullington Trailways \(fullingtours.com\)](#)

<sup>6</sup> The effort to provide Milwaukee - Madison rail passenger service continues. State government policies have the prospect that rail service will start prior to 2028 unlikely, although there is a discussion about service starting closer to 2030. For a discussion, click [here](#).

<sup>7</sup> The long-promised Texas Central high speed rail line between Dallas and Houston has been delayed by management changes, but won a substantial court battle in 2022 to allow it to proceed. Its opening is probably at least a decade away. Amtrak has also depicted this corridor in its expansion plans

<sup>8</sup> We thank Michael Weinman of PTSI Transportation for this insight.