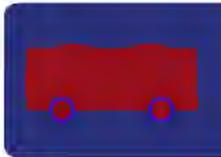


MAKING CONNECTIONS

2020 Outlook for the Intercity Bus Industry in the United States

BY JOSEPH P. SCHWIETERMAN & BRIAN ANTOLIN | JANUARY 30, 2020





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*For the first time in history, the intercity bus industry rolled into a new year having three carriers with extensive networks throughout both the eastern and western halves of the U.S. mainland.¹ Each of the three are at a strategic crossroad: Flixbus is promoting a bevy of new services, Greyhound's parent is evaluating options to sell the carrier, and Megabus has new ownership. Premium operators are simultaneously making impressive gains, although two pioneering lines have ceased operations. **Part I** of this report explores industry trends, while **Part II** reviews notable service additions and reductions by region in 2019. **Part III** looks to the future.*

I. SHORT-TERM OUTLOOK FOR THE INTERCITY BUS INDUSTRY

Four trends herald the major changes underway in scheduled intercity bus travel.

DEVELOPMENT I: FirstGroup's plan to sell Greyhound Lines, announced in May, comes at a time of considerable demand variability. Revenues rose last spring and summer due to a surge in immigrant riders but subsided during autumn.

Scotland-based FirstGroup formally announced its intention to sell the Greyhound operation in late May to "unlock value" in the legacy brand and allow it to focus more intensively on its contract and school services. This intent to sell may have been partially induced by external factors related to instability in the U.K. rail market. In [FirstGroup's May earnings report](#), challenges from low oil prices and increased competition from low-cost airlines were cited. Yet, the company also noted that Greyhound's hiring of a new chief commercial officer with air travel experience and the adoption of an

airline-style revenue management system is bolstering the financial outlook.

Despite this, the parent considers margins too thin to retain the Greyhound unit. Operating profits dropped from \$32.8 million in 2018 to \$14.2 million this fiscal year, which ended in March 2019. Revenues fell 7%, in part due to wholesale service elimination in western Canada.² The operating margin fell from 3.6% to 1.7%.



In spring, Greyhound benefited across the southwestern United States due to rising immigrant ridership, a development discussed on page 15. A [New York Times](#) feature in May reported the fact that this region had grown to account for 11% of Greyhound's total revenue.

INTERESTED IN A PARTICULAR REGION?

Please refer to our geographic sections:

- New England, page 6
- Mid-Atlantic, page 7
- Southeast, page 10
- Midwest, page 11
- Central and Mountain, page 13
- Southwest & California, page 15
- Pacific Northwest, page 18

PLUS, CHECK OUT OUR SPECIAL SECTIONS ON

A. New Flixbus and OurBus Routes

B. Groups Assisting Immigrants Traveling by Bus from the Border Region

With the subsequent decline in immigrant ridership, schedules largely returned to normal.

[Financial results](#) for the six months ending in September 2019, show an uptick in both profits, from £10.2 to £13.5 million, and adjusted operating margin, from 3.0% to 4.0%. In December, however, [FirstGroup booked a charge](#) (a move related to a reduction in asset value) on Greyhound, in part due to ebbing immigrant ridership



Newly installed departure board at Greyhound's station in Chicago, Illinois.

At more than fifty of its stations, Greyhound rolled out new LCD arrival and departure monitors giving passengers an experience more closely resembling airports. Information on the monitors is also fed to its BusTracker app and website. Passengers previously had to settle for static signs and PA announcements to find out where and when to board their bus.

Another notable move (see page 8) was to finally make the entire Greyhound-operated network 100% reservation based. This ended the practice of routinely handling standby travelers on some of its routes.

DEVELOPMENT II: FlixBus, the Germany-based juggernaut now dominant in Western Europe and rapidly expanding in other parts of the world, is building a U.S. network of considerable size and scope. Recent expansion has brought it to the Northeast, Southeast, Pacific Northwest, and Texas. The carrier's business model and network strategies, however, differ from its competitors.

For the first time, the country has three carriers with extensive networks throughout both the eastern and western halves of the mainland, with the others being Greyhound (including its many affiliates on greyhound.com) and Megabus (and other Coach USA units).³ FlixBus now serves 22 states, whereas Greyhound and Megabus serve 32 and 43, respectively.⁴ Each also serves the District of Columbia and at least 9 of the country's 10 largest metropolitan areas.

FlixBus added new routes on an aggressive schedule last year, reminiscent of the dramatic BoltBus/Megabus expansion from 2008 to 2011. Its route system resembles a "U" shaped by the Pacific coast, southern United States, and Atlantic coast regions. Among the most notable gaps: the northern portion of the U.S. mainland between Salt Lake City and Columbus, OH (see Figure 1).

FlixBus has a distinctive business model: it partners with established and often smaller charter and tour bus companies, which assume responsibility for service planning, equipment ownership and operation, most business development activity, and customer care. Drawing up on its sophisticated website, global brand awareness, distribution capabilities, and advertising savvy, FlixBus handles marketing, pricing, and ticket sales. Although this asset-light approach is not unique in the United States (numerous brands, primarily in the east, use a similar model), FlixBus' platform is considered a frontrunner.

The onboard experience being delivered is similar to that on other city-to-city carriers such as BoltBus and Megabus, as FlixBus avoids on-board frills and amenities that drive up costs. A notable difference in orientation, however, is its emphasis on giving customers a greater variety of stop options, including airports, college campuses, and busy commercial and cultural gathering places. FlixBus makes multiple stops in many cities (Dallas, for example, has four⁵) and metropolitan regions (greater Los Angeles has eleven⁶) as well as having numerous rural stops. Other operators, including OurBus and Megabus, have used variations of this strategy on some routes. FlixBus, however, is the first curbside operator of the Internet age to do this on a large scale.

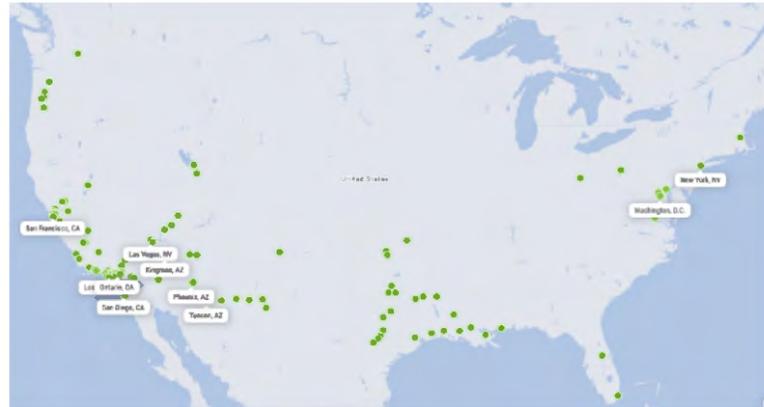


FlixBus primarily uses single-deckers for its U.S. operation. One exception: Los Angeles – San Francisco

Added stops, of course, result in longer trips, which is a notable downside. Recognizing this, FlixBus has developed a hybrid approach that involves overlapping local, express, and intra-regional routes. It melds point-to-point express service with more locally oriented runs. Its many stops are easy to locate using its online search tools. **Greyhound** has a hybrid express/local model on some routes in which high levels of frequency are offered. Unlike Greyhound, FlixBus does not emphasize connections at central hubs, changes schedules frequently (sometimes weekly) and primarily uses curbside locations and stops near expressways that allow quick pickups and drop-

offs. The carrier does little interlining and steers bookings to its website and app.

Figure 1: Locations served by FlixBus



A FlixBus map showing many of the 188 locations it serves. The configuration of cities along corridors shows the availability of multiple pickup and drop-off locations.

The carrier’s rapid expansion and the comments made in the media suggest that it is having success reaching those who would otherwise travel by car. However, its rapid growth carries substantial risk. Rising to a position of dominance and maintaining unified standards will be very difficult in a country as large and diverse as the United States. A table of routes and stops appears on page 22 in our special section, “2019 Juggernauts,” which also summarizes **OurBus’s** growth.

DEVELOPMENT III: Stagecoach’s Megabus unit and the rest of the Scotland-based company’s U.S. operations were formally acquired by California-based Variant Equity. In June, the carrier rolled out a Partners Program that lays groundwork for more contracting with other bus lines on the megabus.com platform.

Ownership of Megabus (megabus.com) and other Stagecoach units in North America quietly [passed to Variant](#) in April 2019. In June, Megabus moved toward a more integrated business model for its intercity network by

rolling out the Megabus [Megabus Partners Program](#). Essentially an “open call” to charter bus operators, it offers companies who directly provide scheduled services sold under the megabus.com umbrella access to extensive marketing, distribution and service-management support. While most of the Megabus network is still operated by divisions



A Megabus double-decker on the Las Vegas Strip. The carrier typically offers five trips in each direction daily on Los Angeles – Las Vegas route, now operated by Windstar.

of Coach USA, the move allows for Megabus to expand without the costs associated with directly operating buses.

Even before the unveiling of the program, Megabus had several contractual arrangements of this type. These include: **Concord Coach**, which operates in New England under its own brand while selling tickets on megabus.com; **Dattco**, which operates between Boston and Burlington, VT, using the Megabus brand name, and **Windstar**, which operates between Chicago and Omaha, NE, under its own brand name while selling tickets on megabus.com. Following the announcement, Windstar assumed operation of Megabus’ Los Angeles-Las Vegas route under its own brand while **Empire Coach Lines** assumed operation of its entire Florida operations as well its Megabus’ Orlando – Atlanta, GA routes.

Megabus also began serving several new locations during the year and, in doing so, continued to strengthen its established network

rather than adding entirely new routes. Stops were added in Bloomington, IL, Fort Myers, FL, and Valdosta, GA, as well as at Dulles International Airport, all discussed below.

DEVELOPMENT IV: Intercity bus lines and booking platforms are using “first and last mile” strategies to help customers more easily access services. Some strategies involve simple discounts but others fully integrate “on-demand” taxi and rideshare services into booking platforms.

Several partnerships involving bus companies involve relatively conventional methods of making travel to stops cheaper and easier. **Greyhound** works with SpotHero to allow customers to reserve parking at discounted rates near its stations and stops while **Megabus** has a similar deal with Parking Panda. **Vonlane**, the Texas-based premium operator, has all of its stops at major hotels with on-site car-rental options.⁷ SilverCar by Audi has concierge-style vehicle service for Vonlane customers in Dallas.

In July, **Hampton Jitney** in New York launched a program with Via rideshare in which customers, after making a reservation, receive a discount code for Via’s shared-ride shuttle service between Hampton’s Airport Connection bus stop and LaGuardia or John F. Kennedy airports.⁸ Customers can redeem the discount to or from the airport. The company also offers 5% discounts for Via trips involving its Manhattan stops. **Megabus** and **Red Coach**, meanwhile, offer introductory discounts for Uber, while **Vonlane** also offers them for both Lyft and Uber.⁹

A handful of companies have taken the additional step of **integrating on-demand service** into their booking platforms and taken on the responsibility of facilitating connections.

Salt Lake Express/St. George Express, which serves Idaho, Montana, Nevada, and Utah, stands out for its “Door-to-Door” program.

Launched in 2011, this allows for passengers in Logan and St. George, UT, and Rexburg, ID (at certain times)¹⁰ to be picked up and dropped off anywhere in designated zip codes near these bus stops. Once a customer opts in and provides pick-up or drop-off address, a connecting shuttle or taxi is arranged to meet them—a service reportedly used by about 10% of customers.¹¹

In October and November 2019, **OurBus** piloted free shared taxi rides to and from its Ithaca, NY stops. Customers who entered their desired address and luggage requirements during booking were grouped and assigned to specific taxis. Customers were alerted about their ride through “push notifications” sent by OurBus. More than 300 rides were reportedly handled in this way, and the program will be rolled out as a paid service in multiple cities in spring 2020.¹²

Many bus lines and booking platforms are providing online travel resources to help with trip planning. Providing “transit feed” in the required GTFS format for Google Maps allows intercity bus schedules to be included when building detailed itineraries involving public transit. One limitation: schedule information appears exactly as uploaded and does not reflect last-minute changes, delays, and other contingencies. Although travelers can’t yet buy tickets for combined intercity bus/transit journeys with one click, Google Maps lists each carrier’s contact information, providing, in effect, free advertising.

More than two dozen carriers make GTFS data available, which requires staff time but has no direct cost. Among them are **Greyhound**, **Peter Pan**, **Megabus**, **FlixBus**, and **RedCoach** as well as many smaller and state-supported carriers, some of which are listed in the endnote section.¹³ This information supports the federal

[Intercity City Bus Atlas](#) project, which seeks to eventually have the preponderance of the county’s intercity routes displayed on its interactive national map.¹⁴

Third-party booking platforms use schedule data to build complex itineraries and summarize travel options. Boston-based **Wanderu** has a full suite of Google Map features to help users plan their itinerary. Its geo-location feature gives those who enters specific addresses myriad options with varying transfer points, cost and travel time. Wanderu also lists connections between different modes in some city pairs and offers Google Maps directions when it is necessary to make transfers. **Busbud** has several integrative features as well. Simpler in design, **Gotobus** offers driving directions and parking information while **iLikeBus** offers a

general area map. The information provided is usually based on algorithms that, while still imperfect, are being gradually improved.¹⁵

Sophisticated platforms like Wanderu’s also help consumers quickly find less-than-daily services that “pop up” at peak times. **Wanderu** [made headlines](#) in autumn by signing a deal with

Kayak.com that allows consumers to simultaneously evaluate air, bus, and train options.

II. NOTABLE NEW SERVICE

Nearly all regions of the United States received at least some new service in 2019. The frequency of services described in this section refers to the number of trips *in each direction*.



NEW ENGLAND

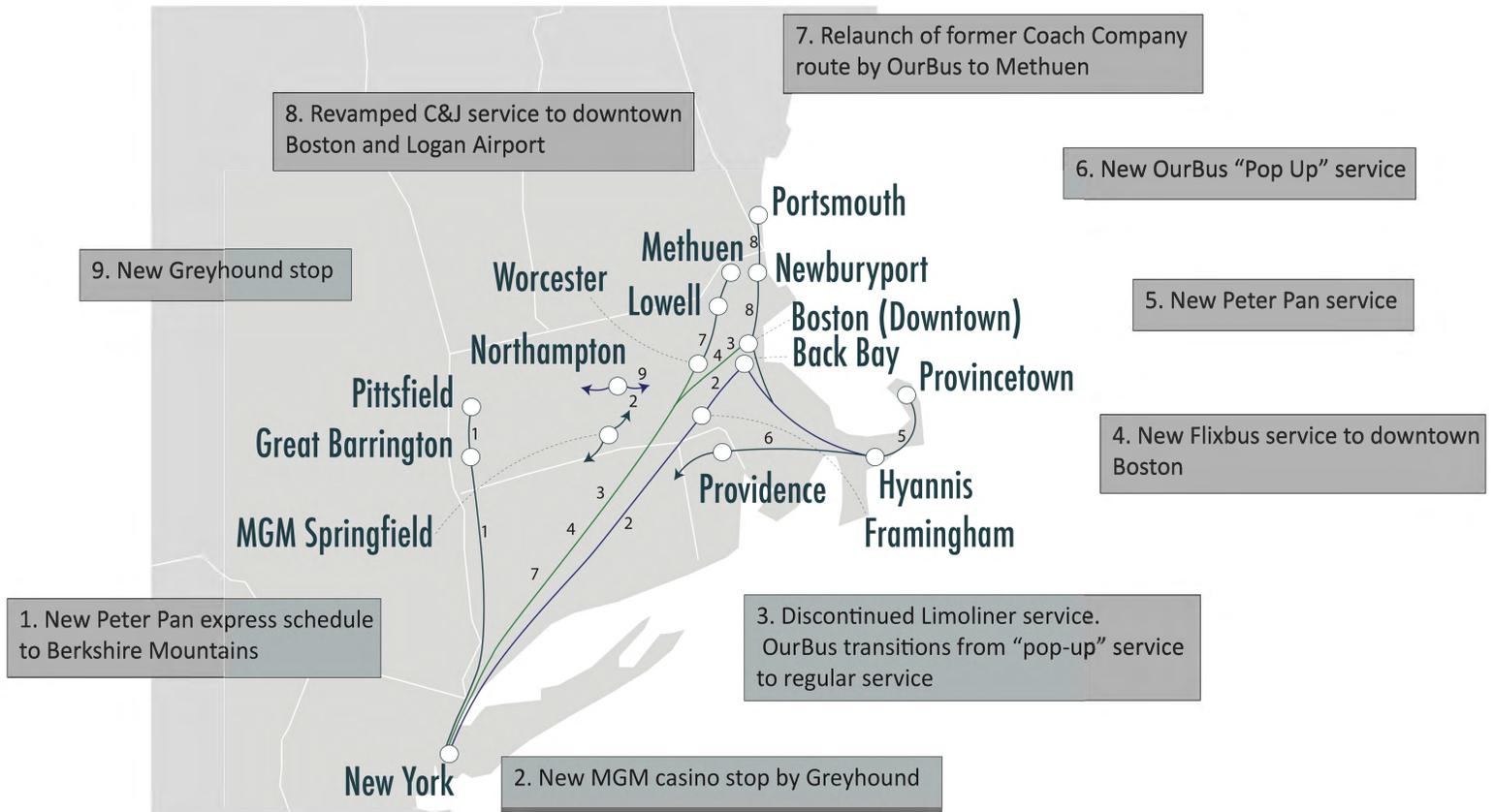
Peter Pan launched a service through Cape Cod connecting Hyannis and Provincetown, MA. The service was made possible by a federal subsidy previously given to long-time motor coach operator **Plymouth Brockton Street Railway Co.**, with whom it now competes.¹⁶

OurBus' service in this region is no longer mostly limited to pop-up operations during holiday and college breaks. In February, it relaunched a direct New York–metropolitan Boston route formerly operated by **Coach Company**, now one of its partners, serving Worcester, Methuen and Lowell, MA. In June, it added a New York–Boston Back Bay route, followed by a college-oriented pop-up route between Long Island and Boston around Thanksgiving.

Another pop-up, connecting Hyannis, MA, Providence, RI, and New York operated during holiday breaks late in the year. **Greyhound's** service to several casino resorts evolved or expanded. In March, it began stopping at the MGM Casino in Springfield MA, on selected buses from Albany, NY, Boston, and New York that already stopped at Springfield Union Station. Greyhound reintroduced Northampton, MA, as a stop on New York–Springfield, MA–White River Junction, VT, route, with one daily trip in each direction.

Peter Pan streamlined its schedule between New York and the Berkshire Mountain region, which typically has a pair of daily trips. In September, it cut running times by 30-45 minutes by adopting an express schedule from the Port Authority Terminal to Great Barrington, MA, resulting in the elimination of numerous stops including Sheffield, MA, and Canaan, Winsted, and Torrington, CT.

Figure 2: Notable New Routes of New England



Concord Coach, while most widely known for its frequent service between New Hampshire and Boston, is experiencing much growth in Maine. In 2018, the carrier [handled 640,000 passengers](#) at 17 locations in the state, 50% more than 10 years before. Its executive-style “Plus Service” from Portland, ME to New York is featured in our *2019 Outlook report*.¹⁷

C&J, known for its extensive New Hampshire and Massachusetts seacoast offerings, rolled out a new service pattern for many Boston trips in June. Its new schedule splits Logan International Airport and South Station service into separate routes, which saves passengers traveling to the station from Portsmouth, NH, and Newburyport, MA, 25 minutes at mid-day and on weekends. To make this possible, frequency to South Station was halved from hourly to bi-hourly, except weekday rush hours, while Logan International Airport service remains largely hourly.

Boston-based Chinatown operator **Coach Run** added several stops to its New York–Boston route, including Cambridge and Newton, MA. Coach Run continues to have a presence in tourist-oriented markets in Florida and the Los Angeles–Las Vegas route as well as the Mid-Atlantic (see below).

In September, **FlixBus** entered the fray by launching a New York–Boston route on an every-two-hours schedule. For a brief period, certain buses continued to Tufts University in Medford, MA.

Limoliner, a prominent Boston–New York luxury operation that had received much favorable publicity for having an on board attendant serving beverages and meals and spacious 2 x 1 seating, [ceased operation](#). The carrier, having started in 2003, was among the first with business-class-style bus service in Northeast corridor. As recently as 2018, it experimented with seasonal routes to ski resorts and summer service to New Bedford, MA, and connections to the ferry to Martha’s Vineyard. LimoLiner

suffered from heavy competition that included eight bus lines and Amtrak.¹⁸

MID-ATLANTIC REGION

The densely populated Mid-Atlantic regions was a hotbed of activity during 2019.

Momentum grew to replace or improve the massive **Port Authority Bus Terminal** in Midtown Manhattan. The Port Authority of New York and New Jersey, its owner, has narrowed the [list of viable options](#) from 13 to just 3: i) fully rebuilding at the current terminal; ii) creating a new terminal on the lower level of the nearby Jacob Javits Center on 11th Avenue; and iii) pursuing a mix of the first two options with bus facilities at both locations.

During a 120-day [public outreach period](#), the agency held many public hearings to solicit input. The final option has yet to be announced. Around \$3.5 billion has been set aside for the project, although the [total cost](#) remains unknown. Work is projected to be undertaken through 2030. Different strategies will be needed to alleviate severe traffic bottlenecks affecting bus movements in the area.¹⁹

Many new services emerged through the region. [Greyhound added a once-daily service](#) linking State College and Harrisburg, PA, to Washington, D.C. This trip, running via Baltimore, complements its existing service linking Harrisburg to the nation’s capital. In April, BoltBus [added Wilmington, DE](#), to its Philadelphia–Baltimore–Washington route, with two to four trips Thursday through Monday. In April, Greyhound converted its entire Atlantic City operation, including service from New York, Philadelphia, Baltimore and Washington, from

Interested in Flixbus or Ourbus? Turn to page 20-21 for a more complete list of route additions and changes. Turn to page 27 a list of pop-up services during holiday breaks.

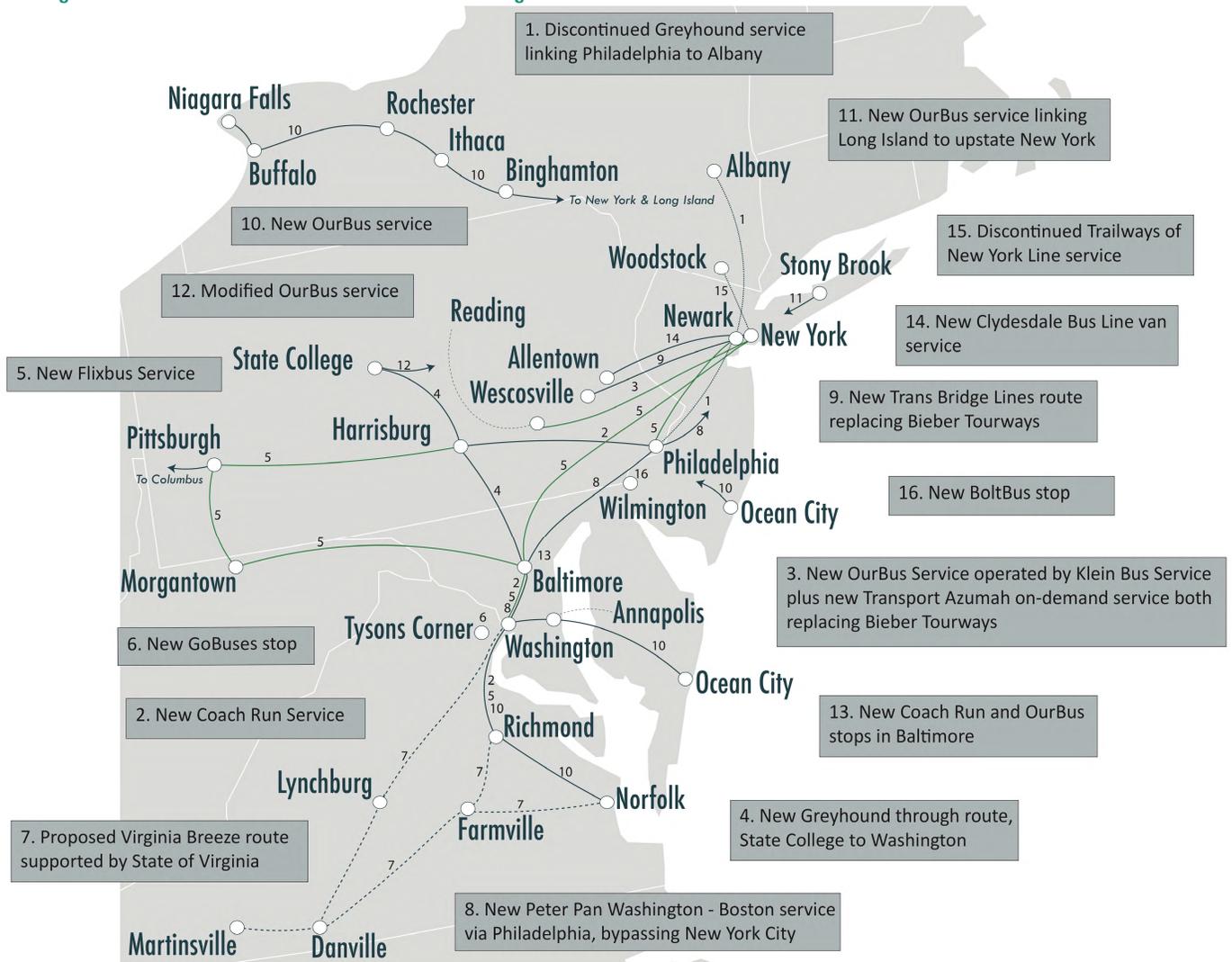
open ticketing to reserved seating. This ended its longstanding policy allowing casino passengers to get on any bus to or from the casino of their choice without a formal reservation. With the change, the entire Greyhound-operated route network is 100% reservation based, with changes involving a \$20 fee. A new requirement that tickets be purchased at least 20 minutes before departure further indicates that the carrier is shying away from handling “turn up and go” business.²⁰

In September, Greyhound discontinued its [short-lived through service](#) between Albany, NY, and Philadelphia, a once-daily offering via New York’s George Washington Bridge Bus Station and Newark, NJ.

GoBuses added a pair of stops in Washington, D.C. In February, it made Tysons Corner, VA, a stop on its Manassas and Vienna, VA, to Midtown Manhattan route, with two to five buses stopping in each direction daily.²¹ In April, GoBuses added Greenbelt, MD, to its Alexandria, VA–Washington–New York route, with two to three trips available on select days.²² Last summer, the company quietly eliminated its stop in Mount Holly, NJ.

Peter Pan has stepped up head-to-head competition with **Greyhound**, a pattern becoming more pronounced since the two carriers terminated their “pool service” agreement in 2017. That agreement, forged in 1998, allowed for schedule coordination and revenue sharing among these historic lines. In

Figure 3: Notable New Routes of Mid-Atlantic Region





Fast-growing OurBus uses a mix of stop locations, including the Port Authority Bus Terminal, Washington, DC's Union Station Bus Terminal, and curbside stops.

May 2019, Peter Pan launched service connecting Philadelphia, Baltimore, and Washington initially limited to Thursday through Monday.²³ In doing so, it revives a route that had been launched in early 1990s, well before the agreement was forged. In July, Peter Pan added a through bus linking Boston and Washington, DC, that bypassed New York, running with Friday and Sunday service.²⁴ That service also serves Philadelphia and Baltimore.

OurBus continues its emphasis on upstate New York, using Ithaca, home to Cornell University and Ithaca College, as a flexible hub. January brought the addition of a weekend-only connection between various Long Island points and Binghamton and Ithaca, a service oriented toward university students. In March, its New York-Syracuse service was extended and made a daily offering to Rochester, Buffalo, and Niagara Falls. In September, a weekend-only direct service began between Long Island and Ithaca (via Binghamton).

On the busy New York–Washington corridor, **OurBus** made several enhancements, starting with the January addition of a pair of Baltimore stops on existing routes and a new

Washington–Norfolk, VA service, via Richmond and Williamsburg, VA, the northern end of which was later extended to New York. A shuttle route also began, allowing Brooklyn and Staten Island passengers to reach Washington, DC, by making a transfer in Hamilton, NJ.

A variety of niche-oriented services launched or were modified. OurBus's State College, PA, service ended in March but relaunched it on a limited basis in October. In May, it began seasonal service from Washington to Ocean City, MD via Annapolis. That same month, a cross-selling agreement with **Executive Coach** involving the latter's day-trip service from Lancaster, PA, to Ocean City, NJ, took effect. A university-oriented weekend service linking Princeton, NJ, to Washington, D.C., running via Philadelphia and Baltimore, also began. Late in the year, other OurBus pop-up routes were established over university breaks linking New York and Washington to various state colleges.

Niche operator **Coach Run** continues to expand rapidly in different parts of country, echoing FlixBus and OurBus but on a much smaller scale.²⁵ In 2019, it entered the New York–Washington–Richmond market with stops in Baltimore and College Park, MD. Three trips are made on some days. The company also assumed operation of East West Bus, connecting New York, Atlanta, and various destinations along the I-95 and I-85 corridors in Maryland, Virginia, North Carolina, South Carolina, and Georgia.

Bieber Tourways of Pennsylvania abruptly shut down operations last February after months of uncertainty about its future in Berks and Lehigh counties in Pennsylvania. The company defaulted on its obligations as a result of mounting debts, increasing liabilities and reduced ridership. Prior to its shutdown, the company had been evicted from the Port Authority Bus Terminal for falling delinquent in

rent payments. After this, it operated from a variety of temporary locations, including curbside stops in Manhattan and a New Jersey ferry terminal.

Following Bieber's collapse, several operators jumped in to help fill the void. **Klein Bus Service** partnered with OurBus to begin linking Douglassville, Reading, and Hellertown, PA to Midtown Manhattan. The two to three daily trips also stop in Kutztown and Wescosville, PA. **Trans Bridge Lines** began multiple daily trips from Wescosville and Hellertown to the Port Authority Terminal. This service dates to 2018, before Bieber's shutdown.

Transport Azumah rolled out on-demand van service between Reading and Kutztown, PA, to New York. **Clydesdale Bus Lines** began a similar on-demand service using vans from Allentown–Bethlehem to Philadelphia. **Martz Trailways** remains a major player on this route.²⁶

Several other new services were tried but soon annulled. **A1 Limousine** partnered with OurBus to launch weekday service linking Allentown to Philadelphia in February 2019, only to discontinue it the following month. **Trans Bridge Lines** launched weekday Allentown–Bethlehem–Philadelphia service in March 2019 but discontinued it in June.

Trailways of New York's premium LINE service, launched in 2018, abruptly ended following the winter ski season in March. This premium weekend-oriented offering featured snacks served by an on-board attendant.

Further south, in Virginia, **Megabus** added in May a Dulles International Airport stop on its popular **Virginia Breeze**, a branded service operating with state financial support between Blacksburg, VA, and Washington via Christiansburg, VA. Significant expansion to this state-supported system is in the works. Virginia's transportation department aims to replicate the Breeze's success, exemplified by a 28% ridership [increase](#) in the third quarter of

2019 over the second quarter of 2018 and an impressive 79% farebox recovery.

In December, the department announced its intention to launch a pair of new Virginia Breeze routes in 2020. The first would cover the roughly 250-mile distance between Danville, VA, and Washington, with likely stops in Lynchburg, Charlottesville, and other points. The second, shorter at 190 miles, would link Martinsville and Richmond with possible stops at Danville, South Boston, Farmville, and other locations in southern Virginia.



Passengers board a RedCoach business-class coach at the carrier's terminal on McCoy Road in Orlando.

SOUTHEAST REGION

Florida-based **RedCoach**, one of the country's largest premium operators, continues to spread its reach in the Southeast. Last spring, it added a route to Atlanta from its busy Orlando hub. This interstate addition was followed in autumn by Jacksonville, FL, which is served both from Atlanta and Orlando/Tampa. In November, it introduced a new level of service called **RedCoach Express**.²⁷ Aimed at budget-conscious leisure travelers and students, this consists of up to four schedules in each direction between Orlando and Tampa, with two stops in each city, including Tampa's University of South Florida.

Figure 4: Notable New Routes of the Southeast

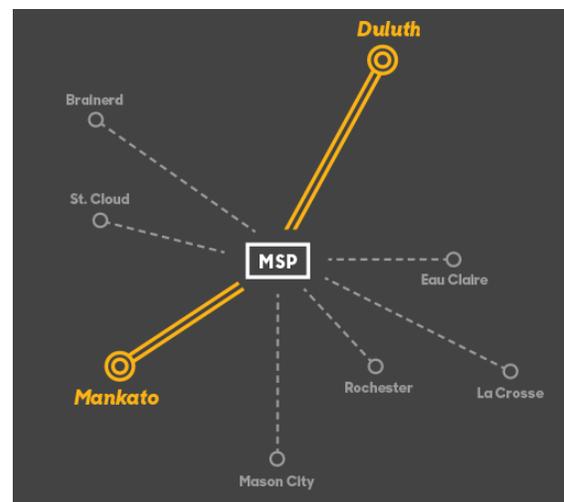


FlixBus made its Southwest debut in November with the launch of Miami–Ft. Lauderdale–Orlando service, an express service subsequently enhanced with local buses making stops in West Palm Beach and Port Saint Lucie. In December, it started Orlando–Gainesville—Tallahassee service, a route paralleling Greyhound and RedCoach all the way to the capital city as well as Megabus to Gainesville. That same month, it began a route connecting Auburn, Montgomery, Mobile, AL with New Orleans. The company commenced Atlanta – Orlando service, via Macon, GA, and Gainesville FL, near the start of 2020.

Megabus [added frequency](#) to the Orlando–Miami route, including an overnight run, and also began making stops at Valdosta, GA, on its Atlanta–Orlando route (via Gainesville) and at Fort Myers on its Miami–Orlando (via Tampa) route. **Greyhound** made only minor service adjustments, including the elimination of stops in Athens, AL, and Athens and Brandon, FL.²⁸

MIDWEST REGION

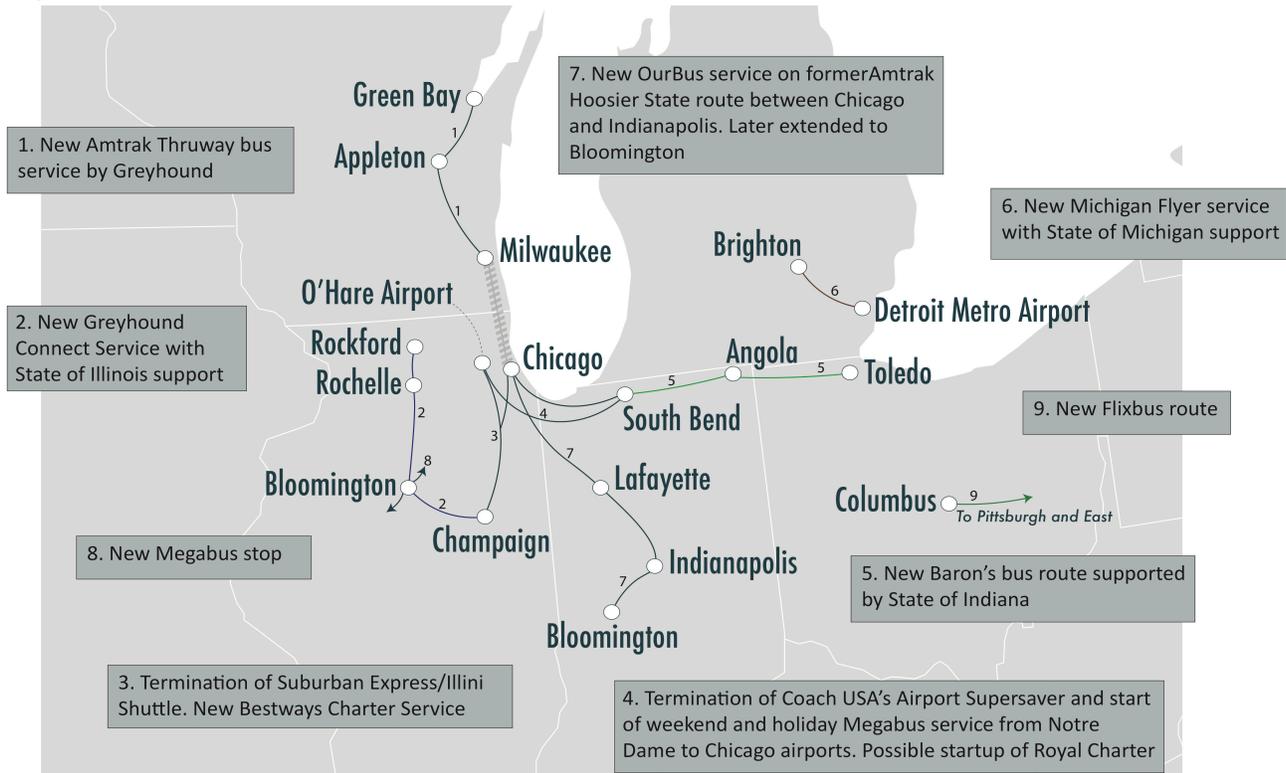
An important development in the Upper Midwest was the June 2019 launch of **Landline**, a nonstop shuttle operator connecting airports at Mankato and Duluth with Minneapolis–St. Paul International Airport. The Minnesota company caters to both point-to-point travelers and those connecting to flights at MSP airport. Ticketed passengers enjoy the benefits of lounges resembling airport gates and free coffee and snacks.



A Landline route map showing the carrier’s routes from Duluth and Mankato to Minneapolis – St. Paul International Airport.

In September, Landline [announced](#) a ticketing arrangement with **Sun Country Airlines**, a low-cost airline operating a large hub in Minneapolis–St. Paul. Passengers can now purchase interline tickets that involve bus-air connections and bus-to-plane checked baggage while also having assurances that they will be reticketed if they miss their connections.

Figure 5: Notable New Routes of the Central and Lower Midwest



Although other bus lines have experimented with such interlining, Landline is pushing this concept to a new level. Landline has notable similarities to **United Airlines' "United Bus"** linking the Allentown and Newark airports. One difference: United Bus is only sold through the airline and not-available for passengers not making flight connections. Landline has made known its plans to expand.

Greyhound [added](#) a Rockford–Champaign, IL, route supported by the federal 5311f program catering to workers in the expanding logistics business in northern Illinois. This service makes stops in Rochelle, Oglesby and Bloomington–Normal, IL. Greyhound also added a new twice-daily **Amtrak Thruway** bus service between Milwaukee and Green Bay, WI. The service, running via Appleton, allows for timed transfers (as short as five minutes) with Amtrak's *Hiawatha Service* to and from Chicago.

OurBus tested Chicago–Indianapolis service prior to the cancellation of Amtrak's *Hoosier*

State train on July 1. The company launched trial morning northbound and evening southbound departures before making the service permanent in autumn. Greyhound, Megabus, and **Miller Transportation** also serve the route. The service has since been expanded to several trips on weekends, with select runs continuing to Indiana University in Bloomington, which previously lacked regular one-seat rides to Chicago.

Barons Bus added a [new daily service](#) between Chicago and Toledo, OH, with State of Indiana financial support. Stops include Angola, LaGrange, and Middlebury, IN, which are all new to Barons.

Jefferson Lines, which celebrated its 100th anniversary in 2019, [moved its Fargo, ND, stop](#) to the city's downtown after a 10-year absence. Fargo's Ground Transportation Center includes a full-service ticketing facility and offers connections to Amtrak and transit buses.

Megabus reinstated a Bloomington-Normal, IL, stop on the Chicago–St. Louis–Memphis route. In Chicago, extensive real-estate development, showcased by the autumn [reopening](#) of the Main Post Office building as an office complex, has made Megabus’ curbside spot on West Polk Street west of Canal Street more vibrant (and less desolate) than before.

In a surprise move, **Coach USA** [discontinued](#) its long-running **Airport SuperSaver** linking South Bend and several points in Northwest Indiana with Chicago’s O’Hare and Midway airports. The carrier blamed Uber’s growing prevalence for traffic declines. To partially fill the void, Coach USA began weekend Megabus service from Notre Dame University to these airports. **Royal Excursion** is [considering](#) restoring other parts of the service.

Indian Trails [enhanced](#) its **Michigan Flyer** service to Detroit Metropolitan Airport by adding a Brighton, MI, stop with arrangements for long-term parking. Operated with state financial support, up to 14 buses make the stop in each direction daily.

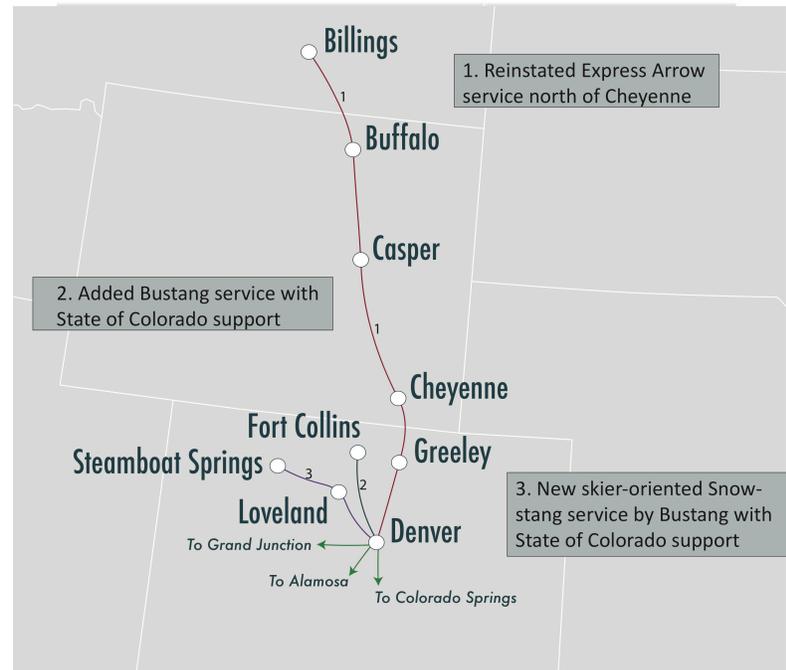
Suburban Express, operator of Illini Shuttle linking Champaign to metropolitan Chicago, [shut down](#) in May. The campus-oriented operator had been embroiled in controversy due to its treatment of passengers. **Peoria Charter** is absorbing some of the traffic and **Bestway Charter** has [launched](#) peak-day service to fill the void.

CENTRAL AND MOUNTAIN REGION

The expansion of **Bustang** remains a Colorado success story, showing the potential of creating integrated networks supported by state and federal agencies. Managed by the state’s Department of Transportation, [Bustang served 21,184 passengers](#) monthly in January 2019, up from around 17,500 the previous year, and has continued to grow since then. (The dramatic expansion that occurred in 2018 is reviewed in

our [2019 Outlook](#)). The program helps ease traffic congestion on roads leading to resorts and constitutes one of the most notable statewide initiatives to coordinate and support intercity bus service with both tourism and economic development in mind.

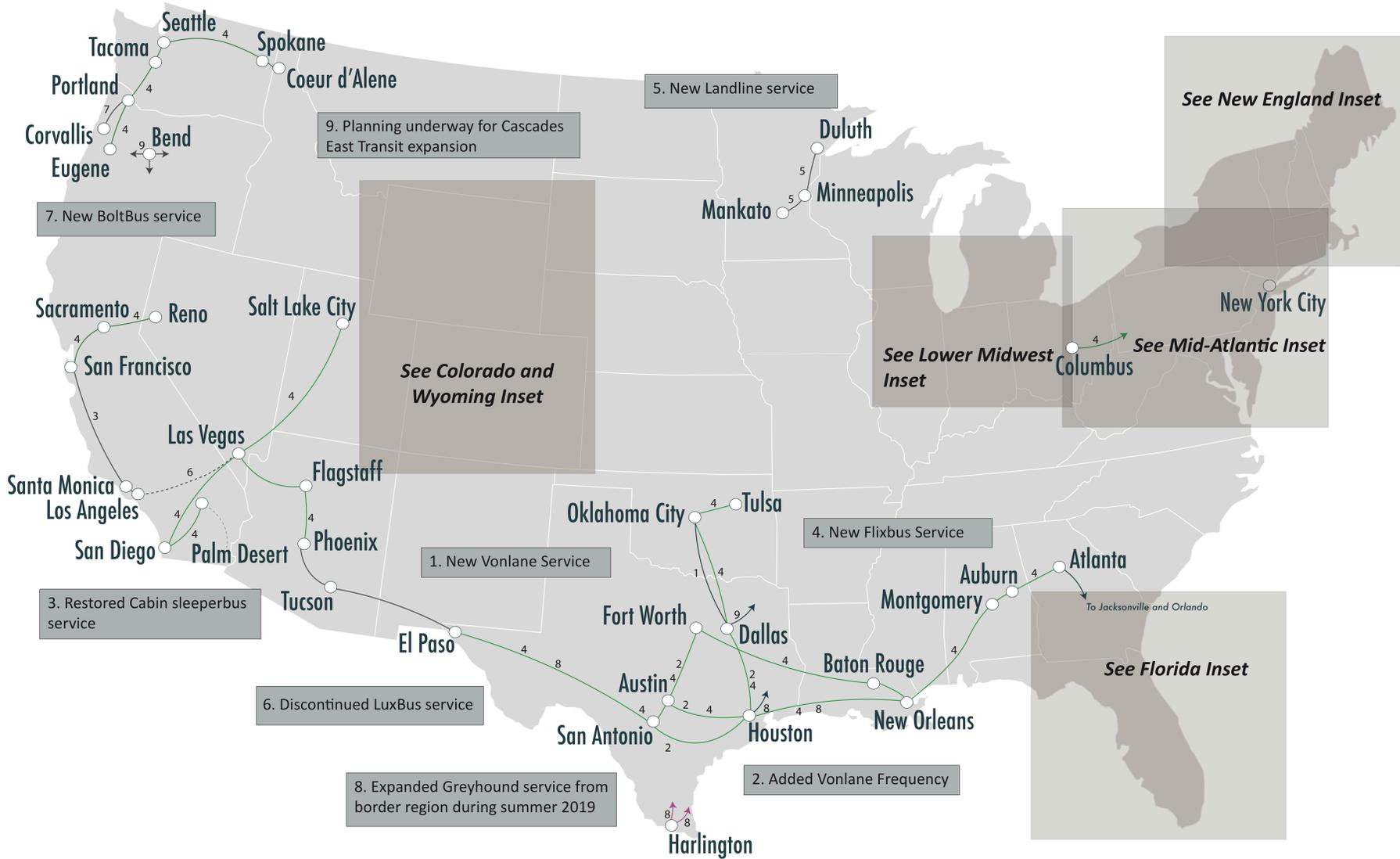
Figure 6: Notable New the Mountain Region



In early 2019, Bustang added a sixth weekday Denver–Ft. Collins trip,²⁹ while December saw the introduction of **Snowstang**, a direct service from Denver Union Station to the Loveland Ski Area, Arapahoe Basin and Steamboat Resort/Howelsen Hill. This service is available on weekends and select holidays. The schedule allows Arapahoe Basin and Loveland Ski Area skiers to make day trips. The fare (\$25 roundtrip) includes guaranteed seating for those buying on-line or using mobile tickets.

Express Arrow returned to the Denver–Billings, MT, route, having [restored](#) its Cheyenne, WY–Billings segment in April. Buses operate four days a week between Denver and Cheyenne and continue on to Billings on Tuesdays and Thursdays.

Figure 7: Notable New Routes of the United States



FlixBus entered Texas and the Gulf Coast region in March, starting with both local and express service in the Texas Triangle, with Austin, Dallas, Fort Worth, Houston, and San Antonio as focal points. By offering multiple stops in larger cities, FlixBus has positioned itself as an effective competitor to Hispanic operator **Tornado Bus**, which offers more pickup and drop-off points than does Greyhound and Megabus, which tend to run express.

A route connecting San Antonio and Houston to Baton Rouge and New Orleans was also introduced, along with a service linking Dallas and these same Louisiana cities (with a stop in Shreveport.) The latter service is a notable addition as a one seat ride is not available on Greyhound or Megabus, both requiring connections. In November, the Houston–Dallas route was extended to Oklahoma City and Tulsa.

Vonlane, the premium provider operating 22-seat buses boasting meal service and a liquor license, continued to expand to and from major Texas cities. In late August, it expanded its busiest routes. Vonlane’s Austin–Dallas service now runs every two hours, while its Dallas–Houston and Houston–Austin service has grown to six and eight trips daily, respectively. A notable aspect of Vonlane’s expansion is that it remains heavily oriented toward weekday travel, a testament to its ability to attract business travelers who would otherwise fly. Many other premium bus lines are busiest on weekends.

Interested in Premium and First-Class Bus Lines? Click [here](#) for our Interactive map or refer the Special [Section](#) in our 2019 Outlook on page 20

Southwest Airlines’ announcement to end its Dallas–Oklahoma City flights prompted Vonlane to [begin](#) offering four daily trips in

January 2020 between these cities, marking its first expansion outside of Texas. Fares are generally \$99 each way, more than twice the typical Greyhound fare but far less than walkup airfares.

Greyhound dramatically expanded service to support immigrant travelers, a move discussed in the following section. It ended service to Mesquite, Wharton, and Wharton, TX, and Emporia, KS.³⁰ **OurBus** discontinued its Austin–Dallas and Dallas–Houston service in July, marking its Texas exit.

SOUTHWEST REGION AND CALIFORNIA

The influx of people crossing the border from Mexico into the United States in early to mid-2019 presented both challenges and opportunities for **Greyhound**. To handle the surge from the border region, the company dramatically expanded operations in the Southwest, Texas, and other parts of the country.³¹

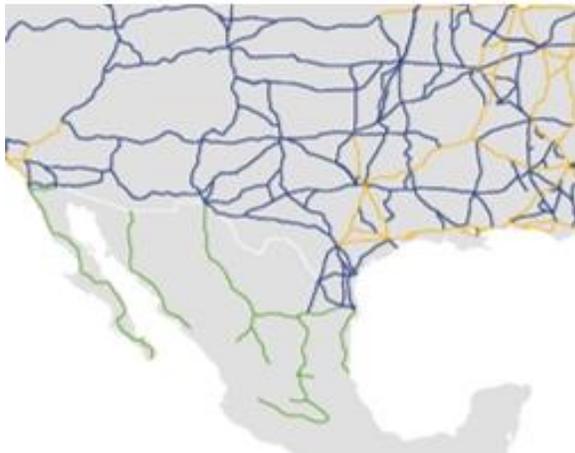
Service on Greyhound’s Southwestern corridor linking El Paso, TX, Phoenix and Los Angeles grew sharply. According to our estimates, the peak of capacity expansion was reached during summer 2019, when the number of schedules operated on this core route was 60% higher than during the previous summer. The estimate does not include the many extra sections that were operated to meet the demand. Other existing routes receiving boosts in service included those linking Dallas to both Atlanta and Detroit, El Paso to both Houston and Nashville, and Houston to Miami.

Several *new direct routes* also emerged, including Harlingen, TX–Richmond, VA and El Paso–San Diego. The expansion began in March but was gradually scaled back to pre-surge levels starting in August.³²

Cabin, the “moving hotel” with pod-style flat

beds introduced in California three years ago, relaunched in September as **Cabin G2**. The service operates overnight between Santa Monica and San Francisco. Cabin had suspended service for more than a year after its pilot to develop and install new proprietary “Cabin Cloud” technology. The founders [consider](#) Cabin Cloud “the first-ever active suspension system designed specifically for passenger sleep – making the bumpiest highway roads feel like a smoother train ride.” Sensors, electric motors, and control algorithms respond to road conditions to provide a better sleep experience. Service is presently limited to once or twice a week, generally on weekends, with prices starting at \$119 each way.

Greyhound’s San Diego to San Bernardino, CA, schedules were extended in July to Las Vegas, providing a direct one-seat ride to and from the gaming capital. The carrier listed its station in Portland, OR [for sale](#) due to development pressure in the area.



Map showing the extensive network of bus routes in the U.S. – Mexico border region.

PACIFIC NORTHWEST

LuxBus, a longstanding Los Angeles–Las Vegas luxury line that boasted an onboard attendant, [has ended scheduled service](#). The company faced increased competition from FlixBus and other carriers as well as a decline in

international travelers traveling to Los Angeles from the gaming center. LuxBus continues to operate charters.

State of Oregon continues providing extensive financial support to expand its intercity network, in part by supplementing funds from the Federal Transit Administration’s 5311f program. In July, the state [announced \\$1.3 million](#) in 5311f funds to sustain and expand service in the state as well as commission a planning feasibility study for service from Klamath Falls to Redmond, a distance of 154 miles. Results [publicized in September](#) indicate that bus ridership in Central Oregon provided by **Cascades East Transit** has more than doubled since 2014, reaching more than 674,000 annually, in part due to new service offerings, including three new routes to Bend.

Boltbus [enhanced](#) its Pacific Northwest network by adding both stops and routes. In March, it added Tacoma and Everett, WA, to select schedules operating between Portland, Seattle and Vancouver, WA. BoltBus also extended several trips operating between Vancouver, BC and Seattle to Tacoma. In October, it launched a college-oriented service [connecting Corvallis and Salem, OR, to Portland](#), which operates twice daily on Fridays and Sundays.

In November, **FlixBus** launched Seattle–Portland–Eugene, OR, service as well as a lengthy Portland–Seattle–Spokane–Coeur D’Alene, ID route via Ellensburg, WA, both having have express and local schedules. Although Greyhound serves Seattle–Spokane twice daily and Portland–Spokane once daily, FlixBus’ Spokane route provides one-seat rides between numerous points in which connections were previously required. It also introduces a direct link from Seattle to Coeur D’Alene, a major leisure destination.

FlixBus’ entry into the Pacific Northwest for the first time creates competition for **BoltBus** from another major “curbside carrier” in this region. FlixBus’ launch in this region is also the first to

use a single bus-operator partner (in this case **MTR Western**) to support operations.

III. CONCLUSIONS & PROJECTIONS

Significant increases in seat capacity on the U.S. the intercity bus system reflects not only growth by Flixbus and OurBus but also expansion by conventional and specialty lines. The growth has been more appreciably on routes between major cities separated by 100 to 400 miles. Meanwhile, new business models are being refined, including premium services aimed at travelers weary of the airports and “branded” state-supported networks.

Among the developments to watch in 2020 are:

- **A competitive landscape increasingly shaped by three large networks.** Greyhound, including its many affiliates selling interline tickets on greyhound.com; Megabus, and other Coach USA units; and Flixbus. Each uses different distribution methods and have divergent strengths and weaknesses. OurBus and other fast-growing independent carriers will add to the competitive mix.
- **FirstGroup finding a suitable buyer for Greyhound.** The sale could bring renewed opportunity to improve the legacy brand’s marketing prowess and to strengthen greyhound.com.
- **Further expansion by Flixbus, making it more prevalent from coast to coast.** The carrier’s entry into more Midwestern and Southeastern cities appears on the horizon. The enormity of the U.S. market, however, makes it unlikely the carrier can grow to dominate in a manner similar to that in Europe for the foreseeable future. Maintaining service standards while growing so rapidly will be a challenge.

- **Continuing pressure to innovate due to rising automobile ownership.** Such pressure will be particularly sharp in rural regions, where ridership appears flat and rising traffic congestion is not a major hindrance to driving. Persistently low gasoline prices will add to the pressure. At the same time, growing concern about climate change could heighten interest in and policy supportive of bus travel.
- **More state governments working to create branded networks analogous to Colorado’s Bustang and the Virginia Breeze.** The evidence is compelling that these systems can be both cost effective and attractive to broad demographic segments.
- **On the most heavily service routes, particularly in the Northeast Corridor, the number of service providers available today may prove to be unsustainable.** The multiplicity of options on some routes (10 providers, for example, serve the New York – Washington market), offer consumers a wide choice of departure times and pickup and drop-off locations but creates a fragility that may result in service rationalization.³³

These developments and others, including more extensive push for “last-mile/first-mile” solutions, make the next several years an important time for scheduled intercity service. ■

SPECIAL SECTION A: 2019's Juggernauts: FlixBus and OurBus

FlixBus added many routes over the course of the year, which appear below (Table 1). Note that some routes are dynamic and almost continuously evolve. All of these routes are operated by contract carriers.

Table 1: Notable Expansion by FlixBus in 2019

Route (with month service started)	Additional Stops
Berkeley–San Francisco–Las Vegas (<i>Dec., '18</i>)	San Jose, Bakersfield, Fresno, Las Vegas Strip
Dallas–Baton Rouge (LSU)–New Orleans (<i>March</i>)	Dallas Love Field, Tyler, Longview, Shreveport, Alexandria
San Antonio–Houston–New Orleans (<i>March</i>)	Houston Hobby Airport, Beaumont, Lake Charles, Lafayette, New Orleans (Univ. of New Orleans)
Fort Worth–Dallas–Austin–San Antonio (<i>March</i>)	San Antonio La Cantera, Austin Airport, South Waco, Dallas Deep Ellum, Dallas Love Field
San Antonio–Houston–Baton Rouge (LSU) –New Orleans (<i>March</i>)	Houston Hobby Airport, Beaumont, Lake Charles, Lafayette, New Orleans (Univ. of New Orleans)
Fort Worth–Dallas–Houston (<i>March</i>)	Houston Hobby Airport, Dallas Market Center, Dallas Love Field
Salt Lake City–Provo–Las Vegas (<i>April</i>)	Las Vegas Strip, Mesquite, St. George, Cedar City (Southern Utah Univ.), Cedar City, South Jordan
New York–Washington–Rockville/Richmond (<i>April</i>)	New York Chinatown
San Francisco–Sacramento–Reno (<i>May</i>)	Stonestown, San Francisco-Berkeley (UC Berkeley), Davis, Midtown Sacramento, East Sacramento
San Ysidro–San Diego–Los Angeles/Montclair (<i>May</i>)	Seaport Village, San Diego Old Town, San Diego Balboa Park, La Jolla, Anaheim, Oceanside, Los Angeles (USC), Los Angeles (UCLA)
Las Vegas–Phoenix (Airport)–Tucson–El Paso (<i>May</i>)	Los Angeles (USC), Montclair, Riverside, Ehrenberg, Tempe-Univ. of Arizona, Lordsburg, Deming, Las Cruces
Austin–San Antonio–Houston–Pasadena (TX) (<i>June</i>)	San Antonio Pearl District, South Austin/The Domain
San Luis Obispo–Los Angeles (UCLA)–San Diego Old Town (<i>August</i>)	La Jolla, Anaheim, Ventura, Santa Barbara
New York–Boston (<i>September</i>)	Boston/Medford (Tufts Univ.)
New York–Philadelphia (<i>November</i>)	
Philadelphia–Washington (<i>November</i>)	
Washington–Pittsburgh–Columbus (OH) (<i>November</i>)	Morgantown (West Virginia Univ.)
Miami–Orlando (<i>November</i>)	Fort Lauderdale, West Palm Beach, Port St. Lucie
Seattle–Portland–Eugene (<i>November</i>)	Tacoma, Olympia, Albany, Corvallis (Univ. of Oregon)
Portland–Seattle–Spokane–Coeur D'Alene (<i>November</i>)	Snoqualmie Pass, WA (Summit), Ellensburg (Central Washington Univ.)
Tulsa–Oklahoma–Dallas–Houston– Hobby Airport (<i>November</i>)	Dallas Bishop Arts, Dallas Love Field, Denton, Thackerville (Winstar Casino), Norman (Univ. of Oklahoma), Stillwater (Okla. State Univ.)
Anaheim–Los Angeles–Palm Desert (<i>November</i>)	Riverside, Palm Springs
Tucson–Phoenix (Airport)–Flagstaff–Las Vegas Strip (<i>November</i>)	Tempe (Arizona State Univ.), North Phoenix, Sedona, Williams, Kingman, Henderson, Downtown Las Vegas
Boston–New York –Philadelphia–Washington (<i>December</i>)	
Orlando–Tallahassee (<i>December</i>)	Gainesville (Univ. of Florida), Tallahassee (Florida State Univ.)
Atlanta–Montgomery–New Orleans (<i>December</i>)	Auburn (Auburn Univ.), Montgomery (Troy Univ.), Mobile
San Diego (SDSU)–Riverside, Las Vegas (<i>December</i>)	San Diego Old Town, Escondido, San Bernardino, Barstow, Las Vegas Strip
Santa Monica–Los Angeles–San Diego (<i>December</i>)	La Jolla (UCSD), Long Beach, Redondo Beach, Los Angeles (UCLA)
San Francisco–Yosemite Valley (<i>December</i>)	

OurBus focused its expansion primarily on New England and the Mid-Atlantic regions. The following list (Table 2) highlights notable additions and subtractions involving regularly scheduled routes. Various pop-up services, many of which were offered during breaks on college campuses, are shown in the endnote section on page 27.³⁴

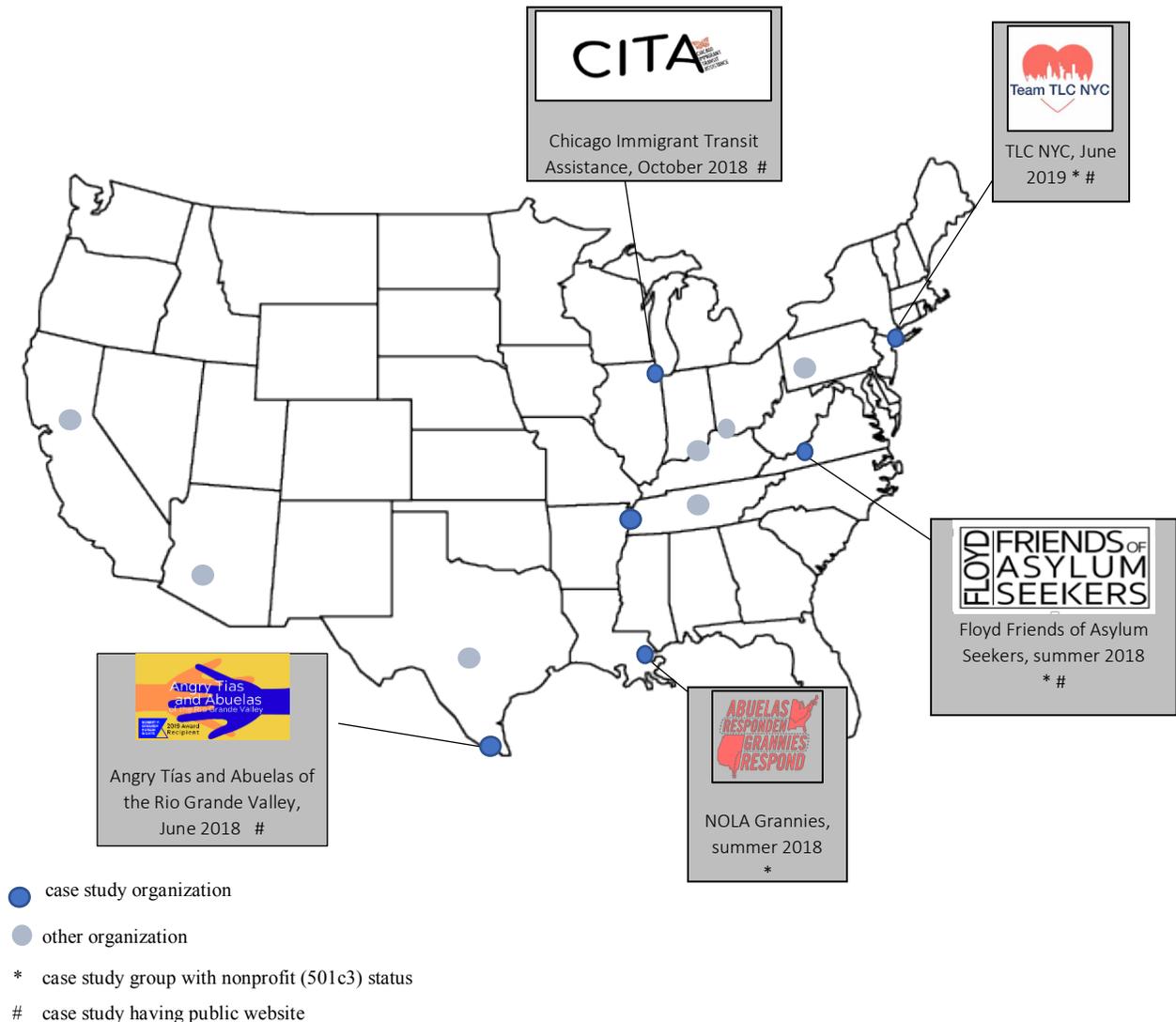
Table 2: Notable Route Changes by OurBus in 2019

Corridors with Primary Endpoints/Stops And Launch Month	Notes & Intermediate Stops
Services Added or Modified	
New York–Washington (MD & VA) <i>(January)</i>	Existing route. Added two stops in metropolitan Baltimore (Towson and White Marsh Mall).
Stony Brook–New York–Binghamton–Ithaca <i>(January)</i>	College-oriented route primarily operating on Fridays and Sundays. Intermediate stops include Melville, Manhasset, Queens. Stony Brook added in September to replace original stops in Islandia and Calverton.
New York–Washington–Norfolk <i>(January)</i>	Washington–Norfolk via Richmond and Williamsburg route launched in January. Extended north to New York in March.
New York–Lehigh Valley/Berks County <i>(February)</i>	New route connecting most locations formerly served by Bieber Bus. Stops include Douglassville, Reading, Kutztown, Wescosville and Hellertown.
New York–Worcester–Lowell–Methuen <i>(February)</i>	Relaunch of former Coach Company-operated route connecting northwest metropolitan Boston under OurBus umbrella with new stop in Worcester, MA.
New York–Rochester–Buffalo–Niagara Falls <i>(March)</i>	Extension of New York–Binghamton–Syracuse service to western New York. Additional stop in Geneva, NY, later added.
Brooklyn–Washington connection <i>(March)</i>	New shuttle service feeding passengers to existing NJ-DC route at Hamilton, NJ. Operates via Staten Island. Discontinued January 2020.
New York–State College, PA <i>(March)</i>	Daily service discontinued, with a limited college-oriented operation resuming in October with stops in Bloomsburg, PA, and Clifton, NJ.
Washington–Annapolis–Ocean City, MD <i>(May)</i>	New seasonal leisure route connecting Washington with Ocean City beach and tourist region.
Lancaster, PA–Ocean City, NJ <i>(June)</i>	New seasonal leisure route connecting Pennsylvania Dutch country with the South Jersey Shore, in agreement with route operator Executive Coach.
New York–Boston <i>(March)</i>	Express service to Boston Back Bay.
Indianapolis–Chicago <i>(July)</i>	New route added in response to the discontinuation of Amtrak’s <i>Hoosier State</i> . Stops include Zionsville and Lafayette.
Stony Brook–New York–Binghamton–Ithaca <i>(September)</i>	New college-oriented route primarily operating on Fridays and Sundays. Intermediate stops include Melville, Manhasset, Queens, Binghamton, and Ithaca.
Princeton–Philadelphia–Washington <i>(September)</i>	New college-oriented route primarily operating on Fridays and Sundays. Intermediary stops include Baltimore White Marsh.
Routes Discontinued in 2019 or Added and Discontinued in Same Year	
Houston–Dallas and Austin–Dallas <i>(July)</i>	Service discontinued
New York–Woodbury Commons, NY <i>(November)</i>	Added direct shopper shuttle service operating between New York and Woodbury Commons Premium Outlets in competition with Coach USA and several other operators. Service discontinued in January 2020.

SPECIAL SECTION: The Network of Organizations Providing Assistance to Asylum Seekers Traveling by Bus

A notable development last year was the surge in intercity bus travel by asylum seekers traveling with limited resources. This section summarizes some of the grassroots and volunteer-driven efforts that emerged or expanded to support these travelers. Some organizations publicized their offering by word of mouth, without a formal strategy or plan, while others had more sophisticated strategies. Although soliciting and cultivating volunteer engagement was generally not a problem, attracting Spanish speaking volunteers was and remains an issue. Bus companies do not receive public financial assistance specifically for serving these travelers but have taken notable steps to support them by expanding schedules and providing informal assistance.

Figure 8: Notable Groups Created Primarily to Serve Immigrants Traveling on Greyhound
With Founding Year and Legal Status



Our findings show groups have emerged in at least a dozen cities with the primary goal of serving these asylum seekers. We feature five of the most notable groups below. Other cities with organized movements include Cincinnati, OH, Louisville, KY, Memphis, TN, Nashville, TN; Pittsburgh, PA, Sacramento, CA, and San Antonio, TX.

Chicago, IL. Chicago Immigrant Transit Assistance (CITA), inspired by the volunteers in Memphis (Mariposas Collective), started its operation in Chicago in December 2018, collecting backpacks and coats to provide to asylum seekers, and working towards forming a group of volunteers. CITA opted not to apply for formal nonprofit status, although it had a semi-structured board and a fairly well-defined leadership. GoFundMe has helped pay for a storage unit near the station for supplies given out to asylum seekers at Chicago's Greyhound station, as well as to finance other activities, such as buying meals for travelers at the station or paying the \$20 fee for changing bus tickets. CITA is now starting a new chapter as a program under the umbrella of the Interfaith Community for Detained Immigrants (ICDI), an organization that has been servicing asylum seekers in Chicago for more than ten years.

Floyd, VA. Floyd Friends of Asylum Seekers provides a "warm welcome" to asylum seekers during brief bus stops in this community. It collects, prepares and distributes hot meals as well as passes out supply kits and clothing to asylum seekers. They currently have more than 500 volunteers. This group is unusual for having emerged in a community that is not a major Greyhound transfer point. Although the group formed in Floyd, volunteers travel an hour and twenty minutes to the nearest Greyhound station.

McAllen, TX. The Angry Tias and Abuelas (AT&A) of the Rio Grande Valley provides assistance to asylum seekers that arrive at the Catholic Charities (CC) shelter across the street from the central bus station in McAllen, TX. They work closely with Catholic Charities, which receives asylum seekers who have been released from short-term immigration detention. At the shelter, CC provides asylum seekers with food, clothing, and help purchasing bus tickets. AT&A volunteers provide US maps and explain the bus stops, bus changes, and their immigration documents, and accompany them to the bus station. AT&A volunteers also regularly cross the border into Mexico to supply the makeshift camps forming along the border. They have set up informal "stores" run by asylum seekers that distribute toilet paper, over-the-counter meds, toothbrushes, toothpaste and other goods, all for free. During Christmas holidays, volunteers provided gifts for children and teenagers.

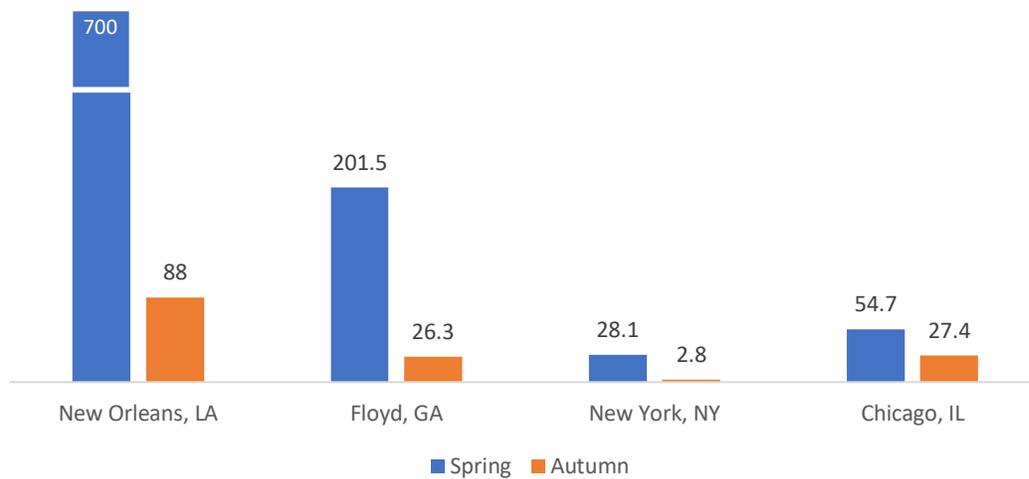
New Orleans, LA. NOLA Grannies serves those using Greyhound in New Orleans. It obtained 501(C)(3) status in 2019, and while it is an affiliate of the national Grannies Respond Group, it has its own board, management team, and is responsible for its own fundraising. On top of serving asylum seekers at the station, it supports several local grassroots organizations assisting asylum seekers and immigrants in the New Orleans area.

New York, NY. Team TLC NYC started after a concerned observer contacted a local advocate about the impending arrival of families to Port Authority Bus Terminal in New York City. Aware that a prior attempt made to organize volunteers in New York had failed, the leader set up an Amazon.com registry to help provide support. Soon, 30 boxes of supplies had arrived. Since then, Team TLC NYC has assisted asylum seekers at the Port Authority, as well as provided a support network and resources to asylum seekers staying in the NYC area.

Analysis. These and other groups bore a heavy burden during summer and early autumn, when volumes surged. As the number of asylum seekers decreased during fall, organizations increasingly looked to diversify their activities. Some organizations pushed to expand into housing, community building, and provision of services.

Our analysis of the approximate change in the number of individuals served is shown in Table 2. Please refer to the endnote section for details on how these rough estimates were made.³⁵

Figure 9: Number of Asylum Seekers and other Immigrants Served by Local Organizations Spring vs. Autumn 2019*



This table shows the heavy volumes of travelers served during Spring and the sharp drop by Autumn 2019. The New Orleans group served by far the heaviest volumes during both periods.

* Estimates are affected by different reporting periods for each group. New York’s initial period was early summer rather than spring, as noted in above.

The chart shows that Chicago has experienced the smallest proportional drop, with numbers cut approximately in half, while the other have seen drops around 70 to 80%. Chicago’s stability reflects its proximity to immigrant detention centers, which release asylum seekers that also use Greyhound to make their way to family members throughout the U.S. mainland. Despite the drop, all but the New York group continued to serve more than two dozen travelers per month. Interpreted broadly, these results show that local groups have served important roles meeting some of the needs of disadvantaged populations moving throughout the country.

This section co-authored by Sofia del Palacio Ugarte

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Coming soon: New study of the evolution of intercity bus service in the New York – Washington route, slated for March 2020 release.

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FOOTNOTES

¹ See Page 2 and Endnote 3 for a discussion of the criteria used to make this claim.

² Greyhound and subsidiary BoltBus continue to operate a route to Vancouver, BC from Seattle.

³ Being a "national carrier" is defined here as serving at least eight states on both the east and west sides of the Mississippi River. For many years, Continental Trailways and Greyhound were the only two carriers with sizeable operations in most major parts of the United States, easily meeting this criteria. Each had substantial networks throughout the east and west halves of the U.S. mainland. Greyhound purchased the Trailways operators in 1987, which left the country with just one national line. Megabus began U.S. service in 2006, thus becoming the second carrier to meet the criteria. BoltBus does not meet the eight-state criteria.

⁴ These estimates do not include service by Greyhound's interline partners, which reach all 48 states on the U.S. mainland.

⁵ The four Dallas-area stops are: Market Center, Bishop Arts, Deep Ellum and Love Field

⁶ The 11 Los Angeles-area stops are: Anaheim, Burbank, downtown Los Angeles, Long Beach, Montclair, Redondo Beach, Riverside, Rowland Heights, Santa Monica, University of Southern California, University of California Los Angeles (UCLA),

⁷ The arrangements involve Avis in Austin, Fort Worth and San Antonio, Hertz in Dallas, Fort Worth, Houston and San Antonio and Enterprise in Oklahoma City

⁸ PTSI Transportation has observed that airport passengers are typically reluctant to make transfers, and that other Long Island carriers have offered direct service to service, so the extent to which the Via connection is heavily used by customers remains to be seen.

⁹ The Uber offer generally involves a \$20 or \$25 discount off the passenger's first ride, while the Lyft discount involves a nominal discount over multiple rides.

¹⁰ This special service is only available in Rexford, ID, during the academic year of Brigham Young University-Idaho.

¹¹ Based on information provided by Salt Lake City Express.

¹² This information was provided by us directly by OurBus.

¹³ A partial list of carriers that submit GTFS data is provided below:

Examples of Carriers Submitting GTFS data for Google Maps and other Online Tools

Boston Express	FlixBus	Mountaineer Transit-Grey	Red Coach
Bustang	GoBus Ohio	Line	Salt Lake Express/St.
Dartmouth Coach	Greyhound	Peter Pan	George Express
Concord Coach	Jefferson Lines	Plymouth Brockton	Washington Deluxe
	Indian Trails		

¹⁴ A variety of websites have been created to simplify the process of finding bus routes as well as public transit connections. In addition to the aforementioned innovations by Wanderu and BusBud, the site rome2rio.com is a popular tool to compare options. The sitedougandadrienne.com is a good example of a website provide user-friendly transit schedule, although it does not include most intercity bus lines.

¹⁵ The information provided, while helpful to many, is based on algorithms rather than real-world travel experiences, making it more useful in some situations than others. The thank Mike Weinman for this observation.

¹⁶ For information on the new route and subsidies provided, click [here](#). PTSI Transportation notes that bus service has been provided since 1938 when rail passenger service was discontinued, and that local transit service is also provided between Hyannis and Provincetown.

¹⁷ The carrier's 2+1 seating on its "Plus Service to New York, similar to that offered by its affiliate, Dartmouth Coach, between Hanover, NH and NY, is proving to be a popular alternative to Amtrak (which requires a transfer between states in Boston), airline travel, and driving to New York. See page 20 of our [2019 Outlook report](#).

¹⁸ LimoLiner boasted a loyal clientele. The company was among the first to offer food service delivered at each seat for passengers, as well as reserved 2 x 1 seating. As recently as 2018, the company also experimented with seasonal operations to ski resorts during the winter and the New Bedford, MA ferry terminal to Martha's Vineyard

and Cape Cod in the summer. Citing financial difficulties as the reason for shutting down, the company faced a highly competitive marketplace with eight intercity bus services and Amtrak all competing for passengers.

¹⁹ Congestion on the Lincoln Tunnel and the I-495 connector, both burdened with the movements of deadhead equipment to and from midday storage in New Jersey, are among the notable problems. We thank PTSI Transportation for this observation.

²⁰ The 20-minute rule, which could affect walk-up traffic in certain heavily traveled corridors. We thank PTSI Transportation for these insights about this rule.

²¹ Details available on GoBuses Facebook Post – February, 2019

²² Details available on GoBuses Facebook Post – April 4, 2019

²³ Details available on Peter Pan Facebook Post, May 10, 2019^h

²⁴ Details available on Peter Pan Email Newsletter, July 26, 2019

²⁵ Coach Run now operates in New England, the Mid-Atlantic region (including upstate New York), the Southeast (e.g., Charlotte, NC – New York), and Florida (Orlando – Miami) as in on the Las Vegas, NV – Las Angeles corridor. Click here for a list of [stations](#).

²⁶ Martz Trailways continues to operate local service between Philadelphia, Quakertown and Allentown as part of its route to Wilkes Barre and Scranton, which also doubles as an Amtrak Thruway service. The Philadelphia – Allentown portion serves the territory once operated by the twice-hourly Liberty Bell Route of interurban electric railway Lehigh Valley Transit.

²⁷ Details available on RedCoach USA Facebook Page – November 14, 2019.

²⁸ Notices of Discontinues. Announcements about these discontinuances can be found on these four links. [Link 1](#), [Link 2](#), [Link 3](#), and [Link 4](#).

²⁹ For a discussion of new service, click [here](#). It is also noteworthy that the Colorado Front Range Passenger Rail Commission continues to study rail passenger service in the Fort Collins – Denver – Colorado Springs – Pueblo corridor, which could eventually supplement Bustang and Greyhound service in these corridors.

³⁰ See previous footnote entitled *Notices of Discontinuances* for informational links.

³¹ There is a long history of transportation companies catering to demand from the border region. Mike Weinman observed the Los Angeles – Texas corridor was important to travel by Latin-Americans even in the early days of Amtrak, when the Sunset Limited added or dropped up to a dozen coaches at El Paso to meet this demand.

³²For a summary of some of the service changes, see three Greyhound schedule links. [No. 21-19](#), [No. 20-19](#), and [No 27-19](#).

³³ The Chaddick Institute plays to release a review of the New York – Washington market this spring. Please email chaddick@depaul.edu to be notified about this forthcoming publication.

³⁴ OurBus offered a variety of “pop-up” operations over the course of the year. Shown below is a partial list.

Fall, Thanksgiving and Winter Break	Thanksgiving Holiday Express Service
New York-Cortland, NY New York-Oswego/Brockport, NY New York-Alfred, NY New York-Geneseo, NY	New York-Wilmington, DE-Norfolk, VA Ithaca to Syracuse International Airport Washington DC-Blacksburg, VA Washington DC-Durham, NC Pittsburgh-Washington, DC
Thanksgiving Break	Various Holiday Breaks
Long Island-Albany, NY Long Island-Boston	New York-Providence-Hyannis

³⁵ These results are provided only to provide general perspective, as the estimates may be sharply affected by the period in which service counts were made. New Orleans is based on April vs. October 2019, Floyd is based on April-May, 2019 vs. September-October, 2019, New York is based on 10 days in June and July, 2019, vs. October, 2019, while Chicago is based on May vs. October 2019. New York’s group had not yet been formed in spring 2019.