

Winter E-News Brief

Transportation professionals,

If you've been in the skies, on the rails, or on the roads lately, you've probably noticed that it is a frenetic time for domestic transportation. The long-awaited recovery in intercity travel is in full bloom, even as the pandemic brings more disruption and labor shortages continue. Here are some highlights of three notable trends the Chaddick research team has been exploring:



#1. Amazon Air flew high on Cyber Monday

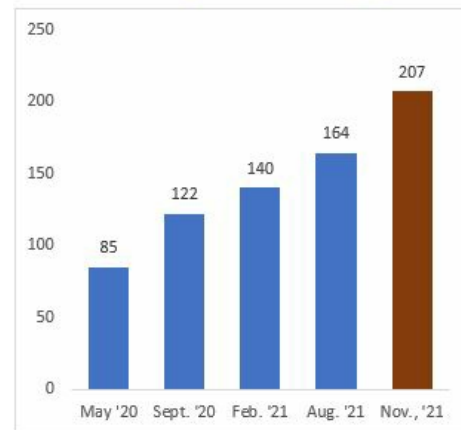
Amazon Air, the cargo airline of Amazon, enjoyed robust expansion while fulfilling a massive number of online orders on Cyber Monday^[1]. [Our analysis](#) shows that:



An Amazon Boeing 767-323 (ER) departs from Ontario International Airport on July 10, 2021 (Peiwen Chen)

- Amazon Air operated 209 flights on Cyber Monday and 206 on Tuesday, November 30, a **26% increase** since similar days of the week [in late August 2021](#), based on our enumeration.
- Amazon Air operated **140% more** flights than it did when we first evaluated its network in **May 2020**.
- The **airline's fleet** grew from an estimated 73 to 81 planes since late August, an 11% increase. Although the fleet still consists primarily of Boeing freighters, it now flies three ATR-72s, turboprops used primarily from Ft. Worth Alliance Airport.
- The **Cincinnati-Northern Kentucky Int'l Airport (CVG) superhub** grew to 30 flights per day, not including extensive flight activity under the livery of ABX and ATI airlines, in which Amazon has an equity stake. For our past analysis of its hub strategies, click [here](#).
- Flights on **intra-European routes increased markedly**, from 8 to 18.5 daily, due to the addition of a 4th and 5th Boeing 737 operated by ASL Airlines.

Amazon Air: Average Number of Daily Flights



As these results show, late 2021 is shaping up to be a remarkable period for Amazon and other online retailers. Look for Professor Schwieterman's presentation on cargo airports at the Transportation Research Board conference in January.

#2. Intercity Buses Rolling to Recovery

Scheduled long-distance bus lines, such as Flixbus, Greyhound, Jefferson Lines, Megabus, and Peter Pan, enjoyed rebounding traffic during the Thanksgiving holiday, even as driver shortages persist. Although we do not yet have detailed estimates of bookings, passenger levels appear to have exceeded 75% of pre-pandemic levels



on numerous routes, with many routes, such as Chicago – Indianapolis, having “sold out” before the holiday. Flixbus' heavily publicized [purchase of](#) Greyhound Lines in October is generating excitement. Outside of California and the Northeast, [the recovery](#) appears to be strongest, even as driver shortages persist. A new luxury line, “[The Jet](#),” with just 14 seats per bus, launched New York – Washington service. Check out our recent fare analysis and intercity bus e-newsletters [here](#), and watch your inbox for our 2022 [Outlook for the Intercity Bus Industry](#) report in mid-January.

#3 Startup Airlines Gaining Altitude



A flurry of startup activity is reshaping the air-travel landscape, particularly at smaller and mid-sized airports. The creation of [Breeze Airways](#) by longtime airline executive David Neeleman, as well as [Avelo Airlines](#) and [Aha! Airlines](#), all of which began flying in 2021, make low-cost

nonstop service available on many thinly traveled routes. Our analysis indicates that more than 95% of these routes link airports that previously lacked nonstop service, and that these airlines tend to offer lower fares. The startup airlines **had the lowest fares, based on one-way December or January travel, in 93% of the routes** we sampled. In most instances in which other airlines had lower fares, those fares required passengers to make connections rather than having nonstop flights. Last week, news broke that yet another new airline, Airbahn, will launch on the West Coast in 2022. Our only regret, as Illinoisans, is that [rumors that](#) Breeze would serve [Chicago-Gary International Airport](#) proved false. Check out the route maps for [Breeze](#), [Avelo](#), and [Aha!](#), which show that most of the new service is in the coastal regions and South. Be on the lookout for further Chaddick analysis.

Breeze Airways Route Map



Plus, rail-passenger operators are looking to expand. **Amtrak** is well-positioned with the recent passage of the federal infrastructure bill, and the privately operated **Brightline** resumed intra-Florida operations a few days ago and is slated to launch Miami – Orlando service in 2023.

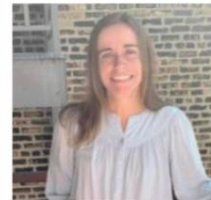
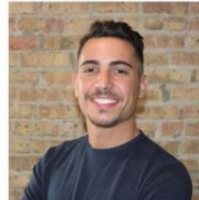
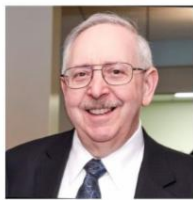
This winter will almost certainly bring more expansion—and surprises. Our team thanks **Alice and Stephen Rudolph** for making a generous gift to support our aviation research and our graduate student team **Abby Mader, Borja Gonzales Morgado, and Allison Woodward**. Safe travels everyone!

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[i] For a discussion of our methodology, which uses estimates based on publicly available data, see our [August Brief](#).



Amtrak's Sunset Limited is boarding at El Paso in September 2021



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