



Back on the Bus

2024 Outlook for the Intercity Bus Industry in the United States

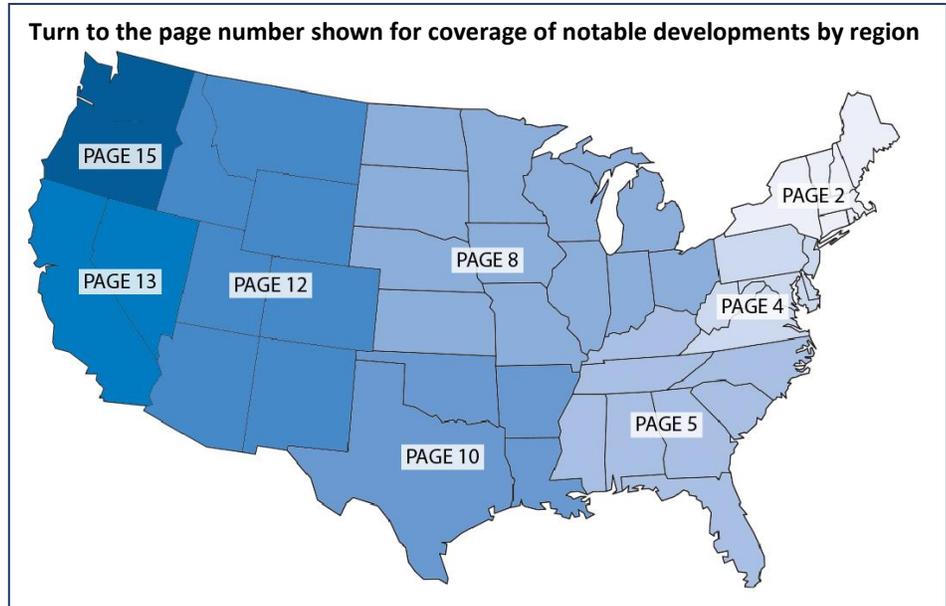
The Chaddick Institute's Annual *Intercity Bus Review* | February 6, 2024
 By Joseph P. Schwieterman, Blythe Chesney, and Akshara Das

**Includes 2023
 Year-in-Review**

Strategic shifts, the shuttering of stations, and more robust consumer demand markedly changed the intercity bus industry in 2023. FlixBus and Greyhound proceeded with their managerial and schedule integration and rolled out more connections between each other's services at a broad set of transfer points. Megabus and Trailways added large regional carriers to their platforms and increasingly marketed multi-leg trips like Greyhound's. First-class operator Vonlane remained bullish on the South, undertaking the largest expansion by a premium bus line since our first *Outlook* report 16 years ago.

At the same time, the image of legacy bus lines took a hit as bus station problems facing Greyhound and its partners continued. More downtown depots were closed, and services were relocated to curbside spots or modest facilities without much (or sometimes any) indoor seating. Perceptions grew that long-distance trips are unpredictable and physically demanding. However, traffic rose to roughly 85 - 90% of pre-pandemic levels, varying by region.

Back on the Bus highlights the notable developments of 2023, organized by geographic region and key nationwide trends. **We also provide predictions and insights on the status of intercity bus ridership nationally on page 16.** We exclude most activity by airport and campus shuttle operators and most rural bus lines from our review, focusing instead on more conventional offerings.



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Photo caption (above): A Greyhound coach at Myrtle Beach, NC in December 2023
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Our Projection: Full Traffic Recovery by 2026, Even as Station Woes Continue

Turn to page 16 for our **six prognostications for the industry**, including our predictions that i) traffic levels nationwide, excluding commuter routes, will fully return to pre-pandemic levels by 2026, up from around 85 – 90% of pre-pandemic levels today, ii) more high-profile station closings will occur, hurting disadvantaged groups, and iii) public policies will gradually swing in the industry’s favor. Even after this recovery, traffic levels will remain marginally below 2016 levels.

NEW ENGLAND & NEW YORK STATE

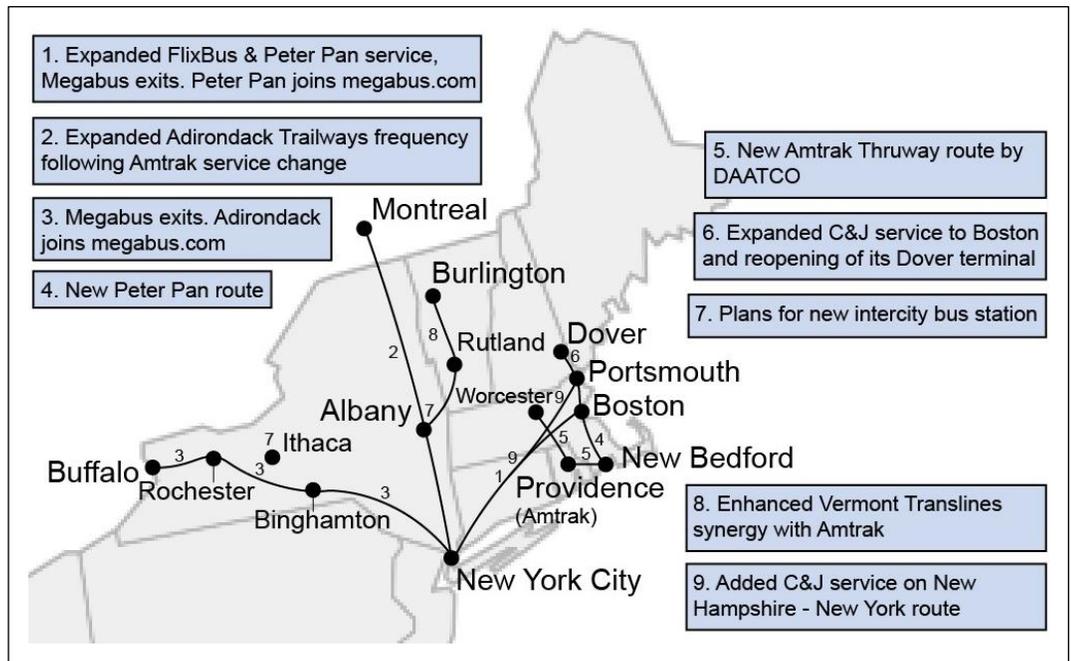
More than any other U.S. region, nearly all the most heavily traveled routes in New England and Upstate New York are highly competitive. Although the players differ by subregion, the price and schedule competition are fierce.

The visibility of megabus.com on the travel scene rose due to the partnerships created in late 2022 that added Trailways of New York (whose brands include **Adirondack Trailways**) and **Peter Pan** to this popular booking platform. Before this, Megabus had decided to discontinue its routes to Boston and Upstate New York. The current arrangement is in keeping with megabus.com’s policy to have its partners (in this case, Peter Pan and Adirondack) exclusive providers on their routes.¹

Boston – New York, until a few years ago, was a bewildering mix of lines. The corridor now has only five main players if you count Greyhound and FlixBus (which have the same owner) as one. **Greyhound-FlixBus**, on peak days, together, typically have 34 downtown-to-downtown departures each way, roughly two-thirds of which being Flixbus, while **Peter Pan**, which runs almost hourly, has a dozen (see our table on page 20). These brands also serve other points in the Boston region not included in the above counts. FlixBus shoulders a heavier traffic burden than Greyhound, partly due to having a prime loading spot outside Penn Station in New York.

After expanding last year, the third player, **OurBus** (a booking platform), has 4 - 5 trips on peak days, leaving from a point near the Prudential Building. It, too, has other direct services from Boston-area locations and

expands significantly during the busiest periods. The fourth, **Go Buses**, typically has two trips daily, primarily originating in Cambridge, MA. Finally, niche player **Coach Run** (a booking platform) has one or two trips on most days and is notable for having stops in both Midtown and Lower Manhattan.



Upstate New York is only slightly less competitive, despite **Megabus’s** recent withdrawal. Four lines, Adirondack, Coach USA’s ShortLine, FlixBus-Greyhound, and OurBus compete head-to-head between New York, Binghamton, and Ithaca.² Three of these—all except ShortLine—also connect New York to Rochester and Buffalo, but bargain hunters will also find that **Wanda Coach** offers several daily trips to these cities from the Chinatown neighborhood.³ Adirondack temporarily expanded service last year between New York and Montreal, QC, at certain times. The move came after Amtrak suspended its *Adirondack* train service north of Albany due to significant speed restrictions imposed by Canadian National.



Two passengers with backpacks prepare to board FlixBus at the New York stop next to Penn Station on October 1, 2023

C&J Bus Lines continues to reinvent itself for the post-pandemic market. The New Hampshire-based line has moved to a reservation-only model without a booking fee. To support the switch, it undertook a schedule expansion on its Seacoast, NH - Boston Logan and downtown Boston routes and is now running airport service half-hourly for parts of the day. C&J also [reopened](#) its Dover, NH, station, which had been shuttered since 2020. Like its Portsmouth terminal, the Dover facility has an attractive waiting room and free parking, which is a rarity for bus travel. Bucking the national trend, C&J opened a terminal in Seabrook, which has almost 800 parking spaces, a spacious passenger waiting area, and four covered bus slips, in 2021.

As they did before the pandemic, **C&J, Concord Coach**, and **Dartmouth Coach** serve different routes throughout the region. Concord and Dartmouth have a business class service to New York from Portland, ME, and Lebanon/Hanover, NH, respectively, whereas C&J has a premium service from Portsmouth and Dover to Manhattan. Each line offers at least one trip per day, with both C&J and Dartmouth having additional trips toward weekends. C&J has up to *three* trips on the busiest days, giving it considerably more service than before the pandemic. In addition, C&J is exploring a possible expansion to its New York service.

A new **Amtrak Thruway** service debuted in August between Worcester and New Bedford, MA, allowing transfers to Amtrak in Providence, RI. Operated by **DATTCO**, the three times daily services are designed for

connection times as short as 20 minutes. Separately, **Peter Pan** [launched](#) a New Bedford – Boston service, an intrastate route previously served by DATTCO.

Vermont Translines’s ridership was 25% higher last year than in 2022. Since restructuring its network in 2021, the provider has focused on twice-daily Albany, NY – Rutland, VT – Burlington, VT, service operated with state support and designed to connect with **Amtrak** and other bus services at Albany. Translines fills gaps in train schedules, allows travelers to reach Burlington and New York several hours earlier than train-only options, and has different intermediate stops. Due to added bus/rail synergy, traffic has grown despite Amtrak extending the *Ethan Allen Express*, a train originating in New York, from Rutland to Burlington in 2022. More than a third of Translines customers make train connections. Bus-only trips can now also be booked on [amtrak.com](#).



Post-pandemic interest in intercity bus services was evident at a June event hosted by the New York City Bar Association and the **Bus4NYC Coalition**. The gathering attracted stakeholders from the American Bus Association and United Motorcoach Association to public transportation leaders. Among the identified challenges facing New York were:

- barriers to electrification due to the high cost of electric coaches, which can be nearly as expensive as new diesel coaches,
- proposed congestion fees, and
- the city’s unique bus-stop permit program.

However, the prospect of exempting private motorcoaches from proposed congestion fees imposed on vehicles entering and leaving Manhattan remains murky, regardless of whether they are on regular routes or in tour/charter service. [One recent proposal](#) calls for motorcoaches to pay \$24-36 once each day they enter the central business district, with credits on specific routes and fees varying by time of day, with commuter buses exempt.

Stops & Stations. The municipal government has purchased the **Albany (NY) Greyhound Station** for redevelopment into a large parking deck. This structure will have a ground-floor intermodal facility that will apparently be available to intercity bus lines. [Critics](#) have panned the current 1970s-era station for its bunker-like appearance. Several years ago, Adirondack and Peter Pan moved from that station to a similarly modest facility nearby. Whether all intercity bus services will eventually be consolidated into the new intermodal facility remains to be seen. Rail connections require a local bus or taxi ride over the Hudson River, although some carriers make stops at Amtrak’s Rensselaer Station,

This month brought [news](#) that the megaproject was moving forward, and a draft environmental impact statement was filed.

The existing Port Authority Terminal now has three attractive ticket offices, those of Peter Pan, Adirondack Trailways, and Greyhound, in its intercity bus area. Competition between these bus lines has increased since the discontinuation of “Pool Agreements” several years ago, which included the coordination of schedules in the Northeast. These tidy facilities are separated from busy pedestrian corridors and waiting areas, but long lines can form during busy periods. The lower-level intercity bus areas remain adequate but unappealing.

MID-ATLANTIC, INCLUDING VIRGINIA

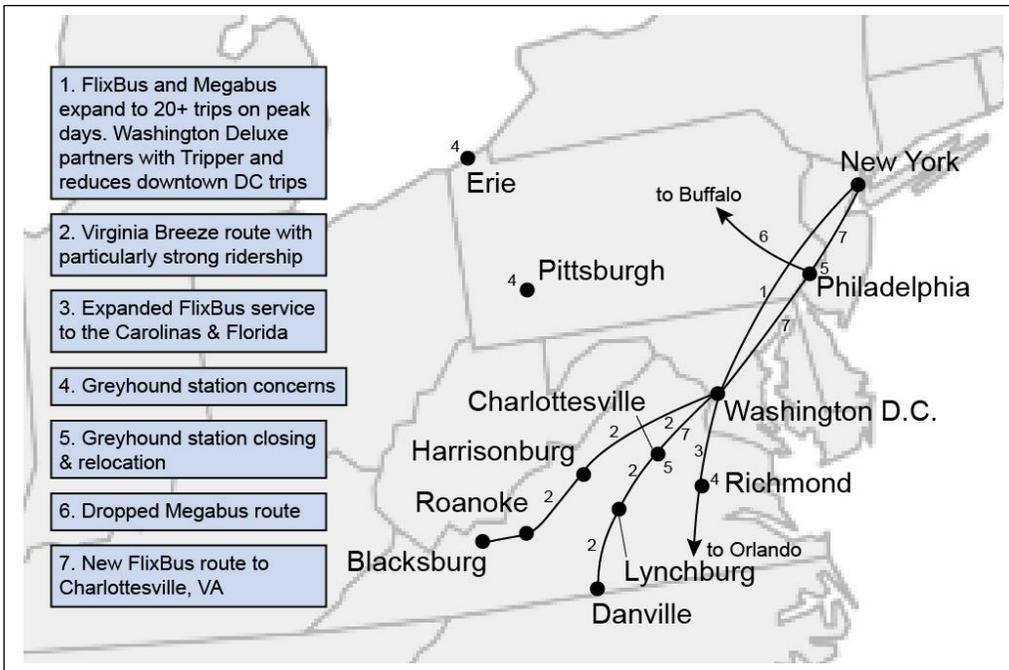
Last year brought relatively few service rollouts in the Mid-Atlantic region, partially due to the slower-than-average traffic recovery in the Northeast Corridor (NEC). Our conversations with the industry indicate that traffic in the NEC is perhaps 75% (or perhaps a little less) of pre-pandemic levels, excluding commuter routes. Travelers nonetheless have myriad options between the New York

and Washington, DC, areas—one of America’s largest intercity bus markets. **BestBus, FlixBus, Go Buses, Greyhound, Megabus, OurBus, Peter Pan, Washington Deluxe, and Vamoose** are all significant players. Each has extensive offerings from Midtown Manhattan. FlixBus and Megabus each offer 20+ trips in each direction on most days, and Greyhound offers 14 (see table on page 21).

The newest provider, **The Jet**, provides first-class service with an onboard attendant. Its service remained steady last year, with two daily trips each way except Tuesday from the Hudson Yards

area of Manhattan. Lower-cost bus service from New York’s Chinatown is even more extensive than a year ago. (See the map on page 25 of our [2023 Outlook](#) report.)

Wanda Coach offers a particularly large number of trips from Chinatown.⁵ FlixBus has become a significant player



Ithaca, NY, is moving ahead with plans to build a new intercity bus station. The municipality’s past policies have generated much pushback by private bus companies.⁴

New York’s Port Authority Bus Terminal is still slated for a comprehensive redesign, but this remains years away.

in Chinatown because of its partnerships with several bus lines that have long focused on this neighborhood. Among FlixBus's newer offerings is direct service from New York to Charlottesville, VA, via Washington, DC, which may be seasonal, as it is now absent from schedules.

The **New York – Philadelphia** route, despite heavy competition from **Amtrak**, also has abundant service. FlixBus typically has 17 daily trips each way during the present slow season, followed by Greyhound (16) and **Peter Pan** (11), while several lines have less frequent service. More trips are offered at peak times.

Megabus's direct service from Washington, DC, to Buffalo, NY, via Philadelphia vanished by early last year, although numerous other routes to these cities can still be found on megabus.com. As a result of the change, travelers from Philadelphia and points south lack direct bus (or train) service to Buffalo, and must transfer in Midtown Manhattan, adding several hours to the trip.

The Commonwealth of Virginia's **Virginia Breeze Bus Lines** continues to enjoy success. The state's Department of Rail and Public Transit (DRPT) [reports that ridership](#) hit an all-



A BestBus coach for Washington, operated by DC Trails, at a Manhattan curb at 34th Street & 9th Avenue in October 2023.

time high in November when there were 7,800 trips, 19% more than the previous year. Traffic on the newest route, the Highlands Rhythm, which links Washington, DC, to Bristol, rose 27%, and on the **Capital Connector**, connecting the nation's capital to Richmond and Danville, VA, it rose 25%. DRPT is studying a possible new route

focusing on the Interstate 64 corridor between the Tidewater region and Staunton. It is also examining the feasibility of installing bus shelters, lighting, and benches at specific rural stops. Due to rising ticket revenue, the total cost of operating the state's intercity bus program has decreased.

Stops & Stations. The closing of **Philadelphia Greyhound Station** at 10th & Filbert, used by Greyhound, **Peter Pan**, and other lines, was one of the biggest stories of 2023. The station had long been at risk due to interest in a new professional basketball stadium on the site, but its demise came more quickly than many expected. The station had a central location, diagonal bus parking, and room for indoor passenger queues.

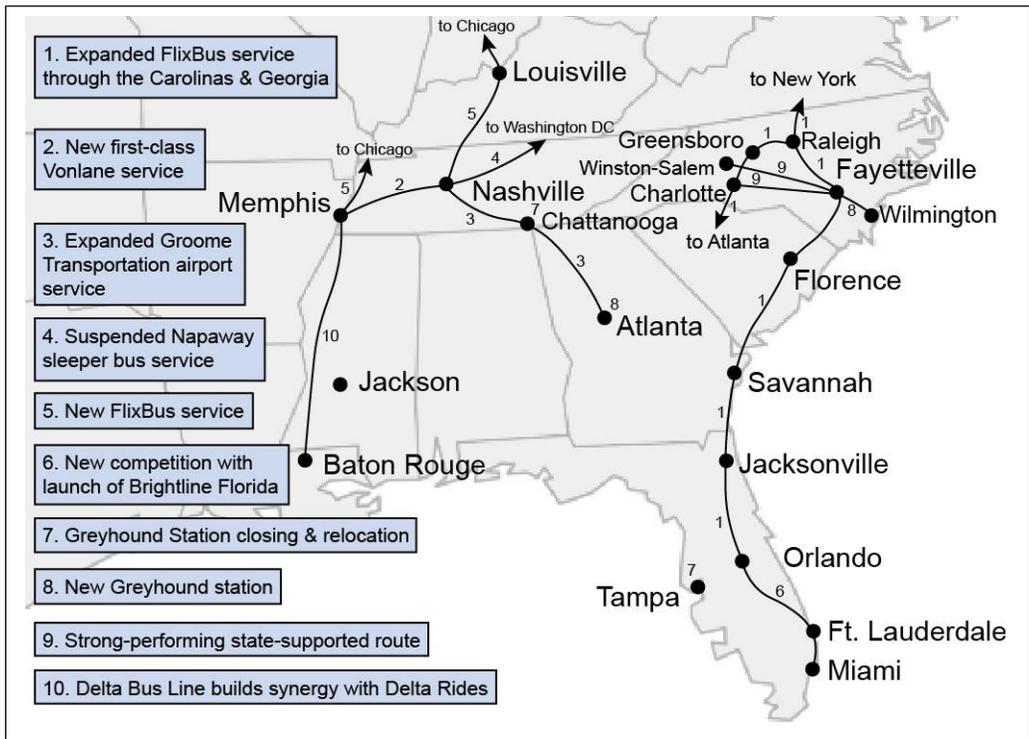
Greyhound and other bus lines initially moved curbside to a nearby spot on Market Street with a small indoor space and ticket counter. Many bus passengers were required to wait outside on crowded sidewalk areas without protective cover, and complaints ensued. Parked coaches also created issues for a bus lane used by local transit buses. In December, bus lines, including **FlixBus** and **Megabus**, which did not use the old station, moved to curbside spots at Spring Garden and Front Street, adjacent to a rail transit stop. The new location is less congested and has a small indoor space and restrooms. However, it is seen as only an interim location.

A major revamp of **Washington Union Station** is afoot and could create problems for intercity bus riders. Currently, bus lines have a dedicated floor on a parking deck above the station's train platforms. The number of bus bays and parking spaces for motorcoaches could be sharply reduced as part of an effort to reduce the number of parking spots, thus impairing peak-period service.

Greyhound stations in other cities also face challenges. The **Richmond (VA) Greyhound Station** appears destined to be closed to make room for a residential building. The **Erie, PA**, station became unstaffed last year, while **Pittsburgh's** station was the scene of several high-profile crime incidents.

THE SOUTH

The South, especially Florida, is recovering faster than most other regions, according to industry leaders with whom we have spoken. **RedCoach's** traffic in Florida now exceeds pre-pandemic levels and is as much as 25%



options except for Greyhound and Hispanic operator Tornado Bus. Vonlane offers meals and beverages served by an onboard attendant, mirroring the Atlanta-Nashville service the group launched in 2022. Perhaps in response, **Groome Transportation** expanded its ATL–BNA Airport Shuttle, which links airports in Atlanta and Nashville. Running via Chattanooga and operated using passenger vans, the 253-mile shuttle runs 12 – 13 trips each way daily.

FlixBus has built an extensive network in the Southeast through its operating partner, Eagle Bus. It now has direct service from New York to

Atlanta and New York to Orlando, FL, via Washington, DC, Richmond, VA, and Raleigh, NC. These lengthy routes expand connections to several dozen other routes and have a pickup option in New York’s Chinatown

greater at certain times. The group is considering extending its network, which now runs as far north as Tallahassee, to Atlanta, GA. **FlixBus** appears to be seeing the benefits of a significant expansion of its Miami – Tallahassee service (via both Orlando and Tampa) made in 2022.

On the busy Orlando – Fort Lauderdale – Miami, FL, corridor, the competition facing **Greyhound**, FlixBus, **Megabus**, **Jet Set Express** (which emphasizes hotel pickup), and Red Coach intensified last autumn when **Brightline Florida** opened its Orlando extension. From endpoint to endpoint, Brightline’s 16 daily trains in each direction are about an hour faster than express buses. Brightline’s typical “walk-up” fare at \$119 in economy class is roughly twice the bus fare, so the most price-sensitive travelers will likely stick with buses. RedCoach, which offers business- and first-class service, closely monitors Brightline’s fares and service.

In other parts of the South, several niche-oriented carriers made significant moves. Luxury provider **Vonlane** entered the Memphis – Nashville, TN, route, which previously lacked scheduled ground



A FlixBus will soon board at the designated curbside location in Tampa, FL in December 2023.

neighborhood. Also, FlixBus began service from Chicago to Memphis and Nashville, TN, last year as discussed in the next section, while Megabus [dropped its Memphis service](#), once provided over several routes.

Strong demand for luxury charters and a shortfall of premium coaches prompted **Napaway** to temporarily shift assets away from its scheduled luxury “sleeper bus” service. Napaway CEO Daniel Aranov has noted that the company uses the coaches previously part of its Nashville - Washington service for luxury charters, for which demand is strong. Napaway plans to resume scheduled line-run service in the not-so-distant future.

Traffic on the bus routes supported by North Carolina’s transportation department is growing. The state has expanded the number of daily roundtrips in the system from 9 to 12 since 2021. Two new federally subsidized routes are part of the mix. Bus miles of service have expanded by 50%, and ridership on existing routes has increased by 37% over the past year, according to state officials. **Mid-State Express**, a service operated by Sunway Charters that links Winston-Salem and Fayetteville, with stops in Lexington and High Point, is among the state’s relatively new offerings. Its Charlotte to Wilmington (via Fayetteville) run is its best-performing subsidized route in terms of ridership, cost per trip, and subsidy per trip.

Delta Bus Lines, which links Memphis and Baton Rouge, LA, is benefiting from [Delta Rides](#), a rural mobility collaboration. Delta Rides serves 22 counties in Mississippi and is part of **Connect MS**, a state-funded initiative to provide reliable transportation to Mississippians with limited options.⁶ Delta Rides brings many riders to Delta Bus stations in Clarksdale, Cleveland, Greenville, and Natchez and serves as a ticket agency for the carrier, which is a Greyhound interline partner. The collaboration is notable for not shutting down during the pandemic (partially to serve those with dialysis appointments) and was

a presenter at a recent **Rural Transportation Assistance Program** conference.

Stops and Stations. Among the most positive stories from 2023 was the **new Atlanta Greyhound Station**. Opened in phases, it boasts natural light from its large windows, a food stand with a grill, spacious restrooms, and a digital departure board. Airport-style seating with power outlets, USB chargers, armrests with cupholders, and cushioning add to passenger comfort. Used by Greyhound, FlixBus, and Southeast Stages, the station is a prototype for other cities. The station has adjacent rapid transit connections to downtown Atlanta and Atlanta Hartsfield International Airport. FlixBus also has a downtown stop in the city.

FlixBus’s relocation to **Greensboro, NC’s** Gayland Depot, which Amtrak and Greyhound use, is another success story. Less favorably, Greyhound temporarily withdrew from Jackson, MS, due to problems at **Jackson Union Station**. This briefly made Jackson the largest metro area on the U.S. mainland not served by the National Interline Bus Network, a system allowing for “through ticketing” between several dozen lines. By late 2023, however, the problem was resolved, and Greyhound returned. The **Chattanooga (TN) Greyhound Station** closed in autumn, and the stop was moved to a service station in Wildwood, GA, 10 miles from the city center.

The closing of the **Louisville (KY) Greyhound Station** and relocation of service to 1211 W Broadway proved less problematic. Despite being outside of downtown, the new facility shows the potential for moving stations to mini-

malls with indoor waiting rooms and ticketing and using the parking lot for staging. This arrangement, while far from perfect, is convenient and orderly.

Bus stations in North Carolina remain a challenge. Intercity bus and Amtrak stations in both **Raleigh** and **Charlotte** remain a significant distance apart, although planning is underway to eventually bring them into close proximity. **Charlotte’s Greyhound Station** is a temporary structure on the city’s future Gateway Center



Finishing touches are being made at the Atlanta Greyhound Station in May 2023. The station’s construction was facilitated by the State of Georgia.

site, which is the planned terminus of **NC by Train** Amtrak service. However, plans for creating an intercity bus facility at Gateway Center are murky. The more immediate concern is finding another interim location to allow Gateway’s construction to begin. A proposal to move operations to a parking deck in University City, an outlying neighborhood, has reportedly raised neighborhood concerns.

THE MIDWEST

Services in the lower Midwest remain in flux, mainly due to significant moves by FlixBus and legacy bus lines. More than most regions, **Greyhound** and **FlixBus** tend to overlap. In some cases, this is apparently due to a desire to preserve Greyhound’s connections with interline partners (which are especially critical in Chicago, Indianapolis, and Milwaukee) while allowing FlixBus to attract new customers, including college students, who seek options besides Greyhound.

Last year, FlixBus added a Chicago – East Lansing, MI, route, restoring direct trips in the college-focused corridor for the first time since **Megabus’s** withdrawal years ago. FlixBus schedules are essentially the opposite of Amtrak’s

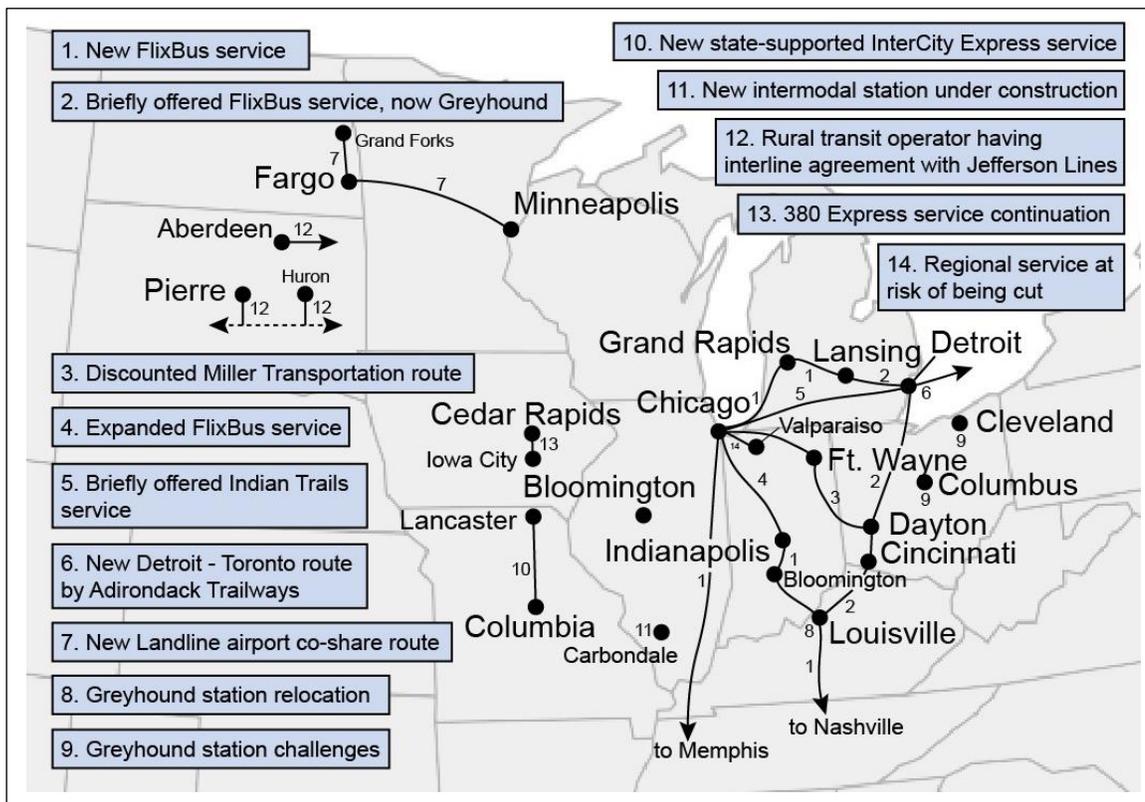
Blue Water service, giving Michigan State University students an attractive evening option to the Windy City.

FlixBus also briefly offered a service along the busy I-75 route from Cincinnati to Detroit, part of a multi-stop service linking Louisville, KY, to East Lansing. Although this route was soon suspended, FlixBus added a new Chicago – Louisville route via Indianapolis at roughly the same time.

Such moves are part of a gradual process that resulted in FlixBus-Greyhound becoming dominant on the **Chicago – Indianapolis corridor**. In 2019, Amtrak reduced its frequency from daily to tri-weekly, followed by **Megabus’s** exit in 2020. **OurBus** (a booking platform) and FlixBus filled the void, giving travelers no fewer than four bus travel options as recently as early last year. However, two of these, **Miller Transportation** and OurBus, had exited by last summer, with OurBus citing traffic drops stemming from a switch to a new curbside spot in Chicago under an expressway viaduct. The relocation was prompted by construction at its old spot near Chicago Union Station. This left FlixBus-Greyhound and tri-weekly trains as the only scheduled ground travel option in this heavily traveled corridor.

Amid the change, FlixBus gradually beefed up its service and, after adding the new Chicago – Bloomington, IN

route, extended it to Louisville, KY, and then farther south to Nashville, TN. Louisville and Nashville travelers previously had no scheduled options from Chicago (and most other major cities) other than Greyhound and commercial air service.⁷ Each city lost Amtrak service years ago. The FlixBus service is operated by Miller Transportation, which, perhaps in response to the need to make equipment available for its





Passengers at the Columbus Bus Station, a replacement facility outside of downtown, prepare to board a Greyhound destined for New York.

partner, discontinued Chicago – Fort Wayne, IN – Dayton, OH, service last year, leaving that route to **Barons Bus**. FlixBus also added Chicago – Memphis, TN trips last year.

Another notable story is an airport shuttle service operated by **Indian Trails Bus Lines** from downtown Detroit, MI, to Detroit Metro Airport, slated to begin in March. [The shuttle](#), reportedly to consist of 16 roundtrips a day and made possible by state financial support, will be similar to the popular **Michigan Flyer** service between the Detroit airport, Ann Arbor, and Lansing operated by Indian Trails. Partially due to the lack of a brick-and-mortar station in the Windy City for bus lines not affiliated with Greyhound, Indian Trails dropped the Chicago – Detroit service it had launched in early 2023. This route allowed connections to a new **Adirondack Trailway** Detroit – Toronto service, also added last year. Adirondack and Indian Trails briefly had Chicago – Toronto through-ticketing options sold on megabus.com that required a transfer in the Motor City. Amtrak and VIA Rail Canada are exploring reviving service on the route.⁸

Landline, the coach line that “code shares” with several airlines, [launched service](#) from Minneapolis-St. Paul International Airport (MSP) to Fargo and Grand Forks, ND, in cooperation with Sun Country Airlines last year. Passengers can book trips between these new points and dozens of airports on the Sun Country website. Landline dropped its more established MSP – Mankato, MN, service. See

our [2023 Outlook](#) report for more on recent Landline expansions.

A regional service linking Valparaiso, IN, to Chicago, **ChicaGO Dash**, could be [scaled down](#) or discontinued due to a funding gap facing Valparaiso’s transit agency. The 41-mile service encompasses five roundtrips on weekdays, mostly provided using full-size coaches, which compensates for the lack of commuter rail service, which has long since been discontinued.

Missouri’s state-supported **Intercity Express** network, operated by OATS Transit, gained a [new intrastate service](#) line last year, a weekday offering from Lancaster to Columbia, MO, via Kirksville and Moberly. **South Dakota’s** transportation department is exploring possible expansions to that state’s rural network. Several local operators, including **Peoples Transit**, based in Huron, SD, and providers serving Aberdeen and Pierre, have interline agreements with **Jefferson Lines**. These agreements show the potential for local lines and large commercial carriers to team up to enable “through ticketing” to several thousand destinations.⁹

Iowa’s **380 Express**, a publicly supported service linking Cedar Rapids to Iowa City, created to support travel during a major I-380 reconstruction project, received accolades last year. It handles around 70,000 passengers annually, including many healthcare workers. [An effort](#) is underway to continue the route after the reconstruction.



A Greyhound for St. Louis boarding at Indianapolis Greyhound Station in early 2023. This municipally owned station also serves as the city’s Amtrak depot.

The development of Illinois's bus network continues to lag behind other Great Lakes states. Both Bloomington-Normal and Peoria lack direct bus service to downtown Chicago, while Decatur lacks any intercity bus service mainly due to the difficulty of finding a station for Greyhound. Express bus service between Chicago and St. Louis, MO, is also lacking. Stiffening competition from **Amtrak's** five daily trains between these major cities, four of which began operating at a maximum speed of 110 mph last year, is partially to blame.

Stops and Stations. Concern is mounting that the **Chicago Greyhound Station** could be shuttered in late 2024 to make way for a residential redevelopment. The station's heavy traffic volume and lack of a viable alternative would make this [a severe blow](#) to the industry. Our review indicates that the station sees 78 daily arrivals and departures combined, boosted by FlixBus's relocation to the station last spring. Previously, FlixBus used a curb near Chicago Union Station.

Columbus, OH's bus station drama continues. The Columbus Greyhound Station had become a political football before its closure in early 2022, when, due to a push to redevelop the site, **Greyhound** and **Barons Bus** moved to a Central Ohio Transit Authority transit facility. However, moving again to a revamped former service station outside of downtown soon became necessary. A stipulation that bus lines spend a substantial sum for security reportedly was a major obstacle to their ability to remain downtown. The municipal government is now seeking to have the privately run replacement station near the city's western edge declared a public nuisance and closed. Forcing the station to close would significantly disrupt bus travel throughout Ohio, including the state's **GoBus** network, which uses it as a hub.

The **Cleveland Greyhound Station** at 1465 Chester Avenue is also at risk. A private developer is eyeing the site for a residential high-rise. The Ohio station's closing would affect passengers and spell the loss of a historical landmark, as it is one of only a few classic big-city Greyhound stations built after World War II still in use. Noted station architect William S. Arrasmith designed the Streamline Moderne depot.

In **Cincinnati**, Barons and Greyhound continue to use a modular facility separated from downtown due to the 2022 closing of the city's downtown station, but several improvements have recently been made. In **Des Moines, IA**, Burlington Trailways and Jefferson Lines moved to a new station following the city government's acquisition and demolition of the previous station through eminent domain. Jefferson is also exploring options for a new Fargo, ND, station due to its inability to continue using the transit center it has long served.

More favorably, **Carbondale, IL**, is building a new multi-modal station to be used by Greyhound, Amtrak, and **Rides MTD**, a prominent rural provider in Downstate Illinois. Greyhound's recent relocation to a downtown

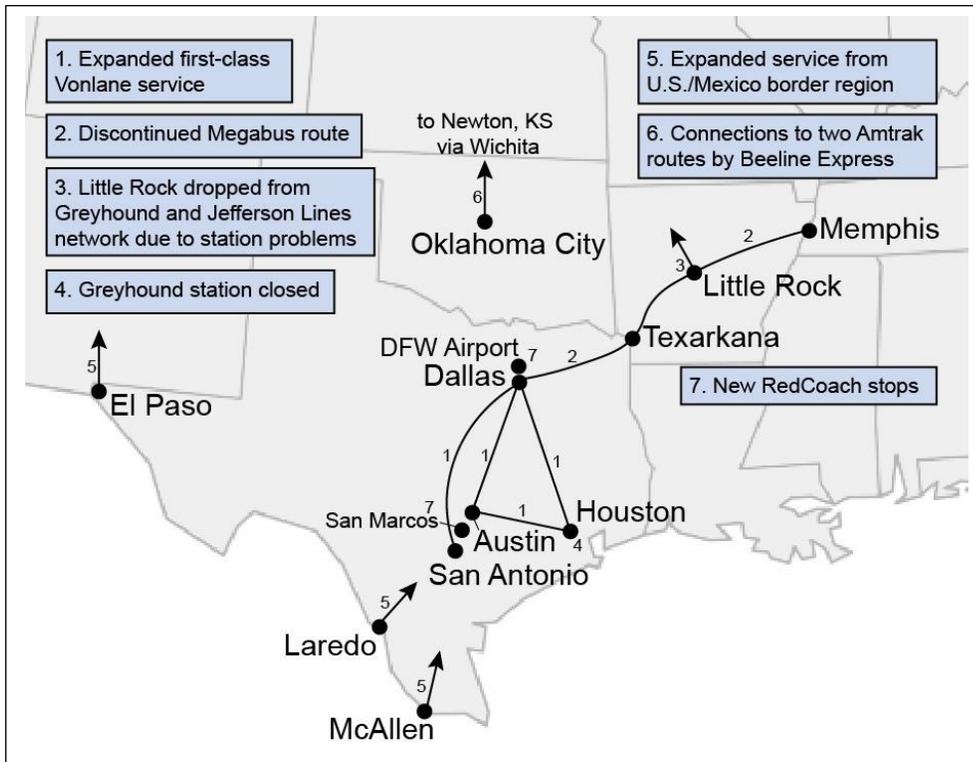


The onboard attendant for the first-class service provider Vonlane assists passengers in Austin, TX, heading for Houston.

transit facility in **Springfield, IL**, located next to the city's future Amtrak station, appears to have gone smoothly. The **Detroit Greyhound station**, while at risk, seems safe from closing, at least for the time being.

TEXAS & SOUTH CENTRAL

For many bus travelers in this county, it is the best or worst of times. In the Texas Triangle, competition between **FlixBus-Greyhound**, **Megabus**, **RedCoach**, **Tornado Bus**, and **Vonlane** gives consumers bountiful options, with Tornado's fleet including double-deckers.



Vonlane's Dallas stop is adjacent to Love Field, a Southwest Airlines hub, allowing for convenient transfers to flights. Company founder and CEO Alex Danza indicated in a [news release](#) that “[t]his is a big milestone for us at Vonlane because it will exceed our prepandemic service offerings.” Vonlane provides onboard meal and beverage service and has other first-class features. Fares typically range from \$94 - \$119, more than twice that of conventional buses.

In other parts of the region, though, bus travelers have fewer options or, in some cases, none. **Megabus** recently

withdrew from the Dallas – Little Rock, AR – Memphis, TN route, which had been part of its system for years. Greyhound and Jefferson Lines have suspended service to Little Rock due to their inability to find a station, a problem described in detail below. Megabus and Vonlane have not served Oklahoma City since before the pandemic, making the city almost entirely dependent on Greyhound and its interline partners.

Fortunately, one of Greyhound's partners, **Beeline Express**, is attracting new riders due to its well-timed connections with Amtrak. One of its two routes connects Oklahoma City and Newton, KS, which are stops for **Amtrak's Heartland Flyer** and **Southwest Chief**.

Heavy traffic originating along the **U.S./Mexico border** region, particularly in South Texas, is helping sustain high-frequency bus service. **Greyhound** has seven trips, and **Tornado Bus** has six from Laredo to San Antonio, TX, on busy days. These carriers have almost as many McAllen – Houston, TX trips (see table on page 21). The heavily publicized motor coaches carrying migrants to Northern cities have been almost exclusively charter runs. McAllen schedules show several FlixBus and Greyhound routes with identical arriving and departure times, which could

See page 21 for a summary of their Dallas – Houston schedule frequency. Megabus no longer has service during certain off-peak times, but the brand ramps up on busy ones.¹⁰ However, service degradation has become a theme in other parts of the region.

In the Texas Triangle, **RedCoach** significantly expanded last year by rolling out premium economy service, which complements the business- and first-class service launched in 2021. RedCoach also added several new stops, including Dallas-Fort Worth International Airport, San Marcos, and, in the Houston area, Cypress and The Woodlands, all of which strengthen its regional offerings. The group reports that bookings have picked up considerably since last year.

Luxury bus company **Vonlane**, which likens itself to a “private jet on wheels,” attracted headlines for its ambitious expansion. The premium operators added 60 weekly departures to its Texas Triangle service in September, giving it 8 – 9 daily trips in each direction on the Austin – Dallas, Austin – Houston, and Dallas – Houston routes. Vonlane offers by far the greatest schedule frequency of any premium service (defined as a service having either a first- and business-class seating configuration or enhanced onboard services) in the United States. It also offers less frequent nonstop Dallas–San Antonio service, launched in early 2023.



Passengers at Austin, TX, board a RedCoach to Austin in September, 2023. RedCoach offers both business-class and first-class buses.

be a cross-selling arrangement.¹¹

Stations and Stops. Little Rock, AR, like Philadelphia, has become a “poster child” for the bus-station woes now facing the industry. Greyhound’s North Little Rock station, its primary stop in that metro region, was shuttered last year. Since then, the Little Rock government has taken a hostile stance toward the resumption of intercity bus service and has derailed attempts to find a new station. We have been told that the government even changed its zoning ordinance to preclude bus stations from being created anywhere in the city.

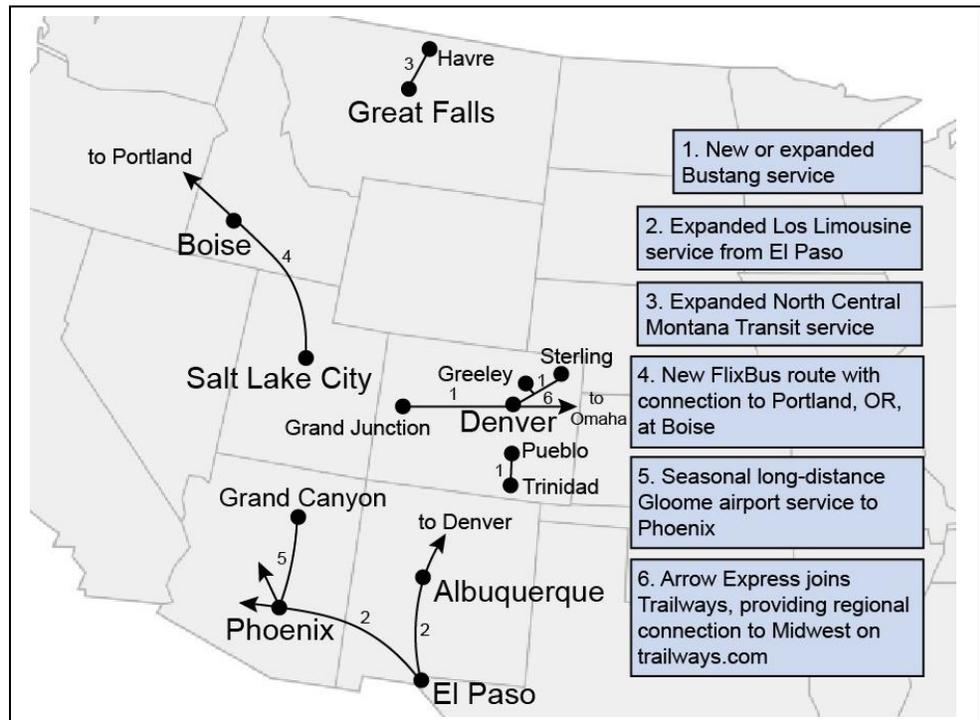
The **Houston Greyhound Station**, a busy downtown hub for migrants and other travelers for decades, has also been closed. Operations have [been moved](#) to a location roughly six miles from downtown, next to Magnolia Park Transit Center. **Dallas’s** iconic Greyhound Station reportedly will be closed this autumn, with no clear alternative publicly identified. This has raised much [local concern](#).

MOUNTAIN REGIONS

Bus travel options in the Mountain regions are expanding despite a lack of heavily publicized rollouts last year. Among the most significant stories is the 25% growth in ridership on the **Bustang** family of services from 2022 to 2023. This state-operated network in Colorado encompasses i) express services along Colorado's Front Range and the Interstate 70 Corridor between Denver and Grand Junction, ii) the rural-focused **Outrider**, iii) the express shuttle **Pegasus**, and iv) seasonal services such as **Snowstang** and **Bustang to Estes** (Park).

Bustang Outrider has expanded significantly over the past 15 months, with new routes added from Sterling to Denver and Greeley in late 2022, followed by Trinidad - Pueblo service last May. This year, passenger access to Bustang in northern Colorado will be expanded with the opening of three transit hubs along I-25 in the communities of Loveland, Berthoud, and Firestone.

The region also saw more expansion by **Los Angeles – El Paso Limo**, a Hispanic-oriented line now commonly called “**Limousine Express**” or “**Los Limousines.**” The carrier currently has five daily trips between El Paso and Albuquerque, NM, among them a third-daily El Paso – Denver trip, added in 2022 and catering heavily to



migrants. Traffic to the Mile High City appears to be strong. The City of Denver reportedly purchased transportation and food for 6,939 migrants to reach their city from January through September last year, costing about \$3 million.¹² However, the share of these trips on regularly scheduled services such as Limousine Express is unclear.

FlixBus launched Boise – Salt Lake City service last year, a service scheduled nocturnally in the eastbound direction, complementing **Salt Lake Express’s** daytime offering. This replaces a Greyhound line dropped in 2022. The new route facilitates connections from the Pacific Northwest to Utah, described in greater detail in the Pacific Northwest section.

A new morning schedule option from Denver to the Midwest emerged on the trailways.com booking site after **Arrow Express** joined the Trailways network last year. Arrow connects the Mile High City to Omaha, NE, allowing transfers to Burlington Trailways, which has an overnight service on this route.

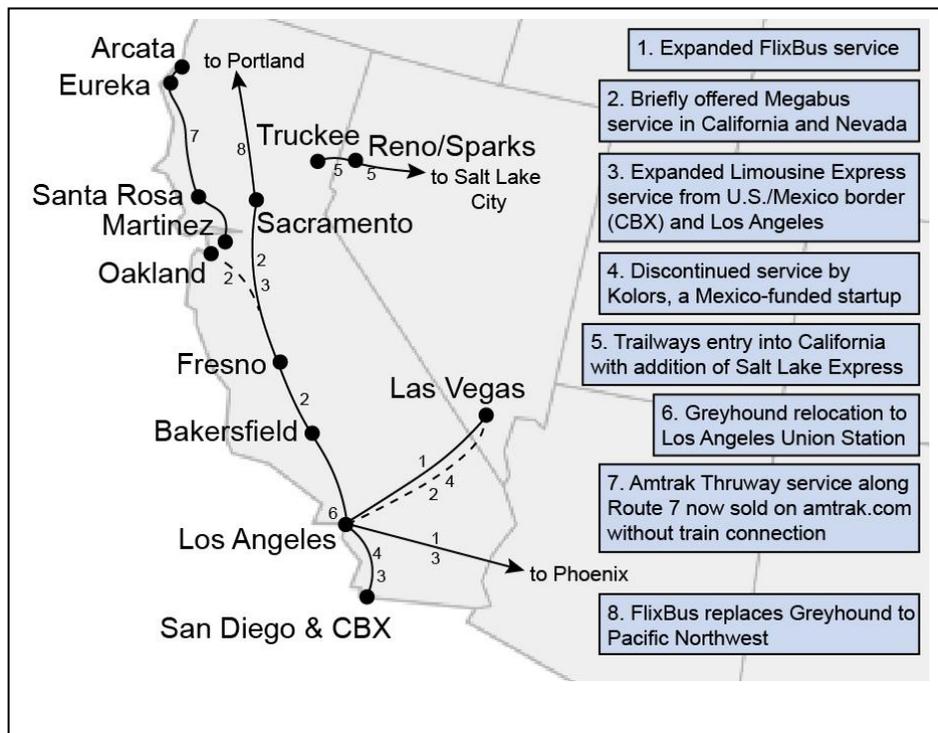
North Central Montana Transit, a rural operation based in Havre, MT, has seen its ridership surpass pre-pandemic levels and is expanding its fleet. The agency is also [exploring](#) added Havre – Great Falls service and studying a southward extension to Helena.

CALIFORNIA & NEVADA

The flurry of competition that seemed poised to reshape bus travel in the Southwest last summer gradually faded. Still, competition remains intense on many major routes, with FlixBus and several lines catering to Spanish-speaking travelers vying for a more significant market share.

The competitive surge began in 2022 with the debut of **Kolors**, a line backed by Mexican venture capital, creating a San Diego, CA – Los Angeles, CA – Las Vegas, NV route. Then, **Megabus** relaunched in the region last spring, running from Los Angeles to San Francisco, Sacramento, CA, and Las Vegas using single-level coaches.

Yet, Kolors had halted service by the middle of last year.



In autumn, Megabus followed suit, perhaps due to strong demand for charter services and problems with the L.A. terminus, which was a considerable distance from downtown. These withdrawals come on the heels of pandemic-era service suspensions by BoltBus and various “mom-and-pop” offerings from Asian neighborhoods. These cuts left FlixBus-Greyhound, Amtrak Thruway service, and several Hispanic-oriented operators as the leading players in the region.

During this period, FlixBus expanded on numerous routes. Among these was Las Vegas – Los Angeles, which benefitted from its convenient pickup and drop-off spot in the gaming center, using a curb next to the posh Fashion Show mall. FlixBus now often runs six trips on that route during off-peak season and apparently more at peak times, roughly the same number as Greyhound. Some schedules on this route were given staggered stops to speed up journeys. The competition it faces has increasingly centered on two prominent lines oriented toward Spanish-speaking travelers:

- **Limousine Express**, which often runs three times daily from Los Angeles to Phoenix, AZ, and El Paso, TX, and a once-daily to Las Vegas, and
- **Tufesa**, whose service from Los Angeles is the mirror image of Limousine Express, consisting of three trips to Las Vegas and one to Phoenix.

Both Hispanic-focused lines offer reserved seating and have attractive downtown pick-up spots in Los Angeles, with Limousine Express having its own station at 6th & Wall streets. Tufesa has a storefront station at 615 Maple Avenue. **Las Vegas Shuttle**, meanwhile, runs a frequent van service to the gaming center. None of these competitors, however, connects Los Angeles to the San Francisco-Oakland area, a route dominated by FlixBus-Greyhound, which ran a combined eight daily trips through much of January, although Tufesa does have a daily bus to San Jose, CA.

Limousine Express is focusing on building an extensive shuttle system from **Cross Border Xpress (CBX)**, a [relatively new bus station](#) near San Diego along the U.S./Mexico border. The line has 11 daily trips from CBX to Los Angeles, where connections can be made to its previously mentioned routes and Sacramento. CBX serves as a remote terminal for Tijuana International Airport, with parking and rental car facilities. It is linked to the airport by a footbridge that traverses the international border and has its own border checkpoint. This one-of-a-kind arrangement offers a convenient means of catching flights to points in Mexico.

Amtrak Thruway has become a more significant force on California's travel scene. Customers using amtrak.com can now purchase bus-only tickets on at least six routes, including routes where train service is available. Among the most notable [recent additions](#) is **Route 7**, which links Martinez to Arcata via Santa Rosa. Also, **Trailways** now has a foothold in California in the form of Truckee service due to SLE's addition to trailways.com.

Stops and Stations. Greyhound's Los Angeles operations were moved from its longstanding depot on 7th Street to **Los Angeles Union Station (LAUS)**. This puts LAUS among a growing number of terminals that have Amtrak, commuter trains, transit buses, metro rail, and Greyhound practically side by side. The mixing of commuters and long-distance travelers creates a dynamic atmosphere in the below-ground concourse that contrasts sharply with the dreariness of some older traditional bus stations. **Greyhound** and FlixBus have a staffed ticket window, and

the bus platforms are part of the station's Patsaouras Transit Plaza. The loading area is lined with palm trees, providing shade and attractive mosaic pavers. Nonetheless, there is little indoor seating near the bus platforms or a digital departure board. Another issue is that some FlixBus departures do not use the facility; instead, they use a nearby stop outside station grounds, apparently due to bus-bay capacity limitations.

The **LAX Flyaway** service provides frequent bus service to the Los Angeles International Airport from the LAUS bus area. Amtrak and Metrolink provide moderately frequent



A Greyhound at Los Angeles Union Station in August 2023. The carrier had moved from its longstanding depot on 7th Street only a few months before.

service to the Hollywood-Burbank Airport.

Las Vegas's South Strip Transfer Terminal, while not in a walkable area, has expanded in importance since the 2019 closing of the city's downtown Greyhound station. Its ample seating, high ceilings, uplifting design, and constant security presence exemplify the City of Las Vegas's commitment to bus travel. That commitment is critical to Nevada's publicly supported intercity network, including Salt Lake Express's relatively new Las Vegas – Reno route, launched in 2021, filling a void in that corridor.

Salt Lake Express has a novel schedule pattern at the Las Vegas terminal, allowing it to “double” as an airport-oriented service and traditional bus line. Coaches from Harry Reid Las Vegas International Airport for both Reno and Utah also call on the nearby South Strip Transfer Terminal. Passengers with tickets originating on

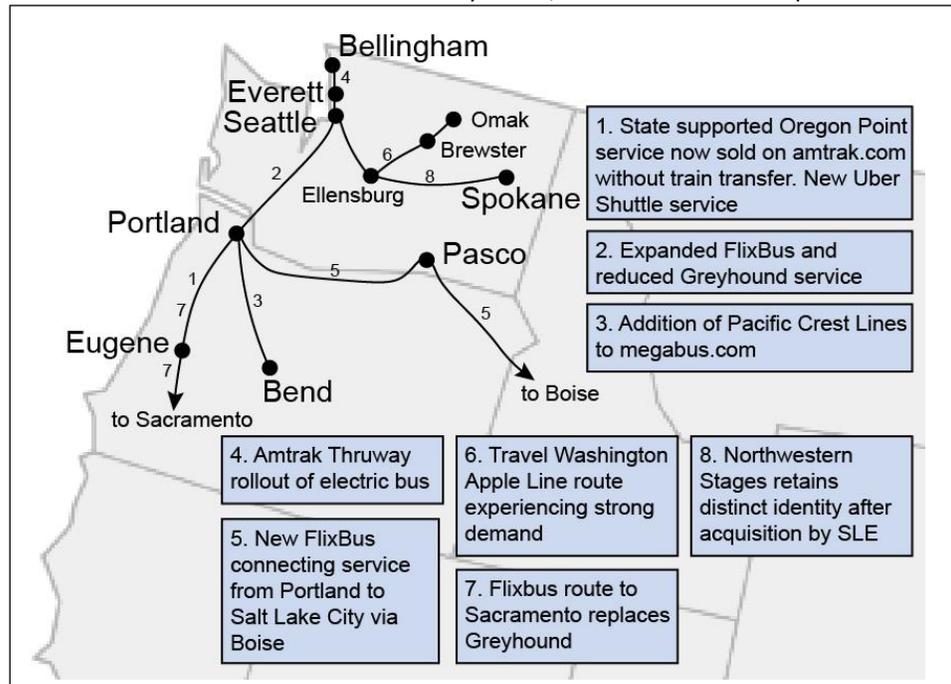
Greyhound and other SLE routes can board here, which multiplies literary options in a way barely noticed by many airport riders.

particularly strong. On the busy Portland – Seattle corridor, options remain limited to FlixBus-Greyhound, which offers seven trips on

THE PACIFIC NORTHWEST

More than any other region, the Pacific Northwest shows the potential of integrating local bus services provided by public agencies with national bus and rail providers. Travelers can book trips from places on Oregon’s **Point** network, which is operated with state financial support, to points throughout the country on amtrak.com. On the Portland – Eugene leg of **Amtrak’s Cascades Corridor**, a customer can select either a train or a Point bus service on that website, even if not connecting to or from a train. Buses and trains are attractively spaced throughout the day to maximize traveler convenience.

An impressive degree of integration exists in Washington state. All four of its state-supported **Travel Washington** intercity bus routes, the Apple, Gold, Grape, and Dungeness lines, are set up for interline ticketing with Greyhound. Tickets can also be purchased on Amtrak’s website with or without train connections. **Greyhound** operates the Dungeness line under contract with the state. Traffic has returned to 80 – 90% of pre-pandemic levels, with the Apple Line linking Omak to Ellensburg



many busy weekdays. Amtrak’s expansion from four to six daily trains last year will likely create headwinds for the expansion of the bus service.

To complement its expanding Cascade Corridor train service, Amtrak launched its **first electric vehicle motorcoach** service with support from the State of Washington. The electric coach replaces a diesel-powered coach operating between Seattle and Bellingham, making stops in Everett and Mount Vernon. The coach, owned and operated by **MTRWestern**, can travel nearly 200 miles roundtrip on a charge (which somewhat limits its utility on many corridor trips). It is part of an Amtrak Thruway service allowing transfers at Seattle’s King Street Station. The rollout ends a lull in using electric coaches for scheduled intercity service.

Another notable trend is **Greyhound’s gradual downsizing** in favor of channeling traffic to its service partners. The Oregon – Idaho – Utah market is a good example of this. In 2022, Greyhound eliminated its Portland, OR – Boise, ID – Salt Lake City route. **Salt Lake Express (SLE)** partially filled the void by launching over the segment east of the Idaho capital, and FlixBus closed the gap by launching between Portland and Boise. More recently, FlixBus launched its own Boise – Salt Lake City service, allowing for well-timed connections at the Idaho capital on trips from Oregon to Utah.



However, due to Greyhound’s cuts, Seattle residents must make 2 – 3 transfers to reach Utah. Although the effort to restore Amtrak’s *Pioneer* train could simplify the journey, that remains years away. Greyhound’s former service between Portland and Sacramento, CA, has also been



A line forms at FlixBus’s Las Vegas Strip boarding areas for a Los Angeles departure in August 2023. Several casinos tower in the distance.

reduced, with Flixbus’s once-daily offering being the only option available for the two brands during the slow season. The only scheduled ground competition is **Amtrak’s Coast Starlight**, which, like several Amtrak long-distance trains, has severely reduced capacity since the pandemic, and **Autobuses Fonteras Del Norte’s** once-daily service catering to Spanish-speaking passengers.

Northwest Stages, long a mainstay on the Seattle - Spokane - Boise ID route, remains a distinct brand well after being purchased by SLE in 2022. Separately, Oregon’s **Pacific Crest Lines**, which links Bend to Portland, Salem, Eugene, and other points in the state, began using the megabus.com platform. Also noteworthy is **Groome Transportation’s** cross-selling agreement with Uber to have Groome’s vans between Portland and Eugene, OR, sold under the **“Uber Shuttle”** label, which could be a sign of things to come.

TRENDS & PROGNASTICATIONS

The developments of 2023 set the stage for these five conclusions and prognostications:

Prediction 1: Passenger traffic, now at 85 – 90% of the pre-pandemic level, will fully recover by 2026. Driver shortages and other problems could slow the recovery, which will be uneven across regions, but the trends are favorable.

Our independent analysis and conversations with industry executives indicate that passenger boardings nationwide are around 85 – 90% of 2019 levels. Traffic has recovered to pre-pandemic levels on many rural and warm-weather routes, with many surpassing prior levels. The ridership bounce-back more closely resembles that of domestic airlines and Amtrak than commuter rail and rapid-transit services, and we expect total passenger boardings nationwide to reach 2019 levels in calendar year 2026.

At the same time, on secondary routes, or routes serving large downtown districts in which commercial activity has fallen dramatically since pre-pandemic times, passenger boardings remain well below 2019 levels. Traffic in the Northeast Corridor appears to be the weakest of all, even when commuter routes are excluded, being 25% (or more) below pre-pandemic levels. While several private transit operators in the Northeast have given up their fixed routes or fixed route contracts to concentrate on tours and charters, their rising visibility on prominent booking platforms is helping attract new riders.

Traffic is nonetheless on an upward trajectory almost everywhere, despite the amount of service provided by legacy bus lines, such as Greyhound, Trailways units, and interline partners, apparently still being around 15 – 20% below pre-pandemic levels. New partnerships are allowing services to be deployed more judiciously, enabling the traffic recovery to outpace the new service added, boosting passenger loads.

Our projection for a full recovery by 2026 hinges on the industry overcoming driver and equipment shortages. Recent months have brought good news about this. A full recovery may also require upward movement in the price of fuel, which drives up the cost of driving and flying to a greater extent than bus travel. Even if a full recovery occurs, traffic will remain marginally below what it was a decade ago.

Prediction 2: The serious problems stemming from the closing of traditional bus stations will worsen before they get better. The accumulating effects of the closings will hurt disadvantaged populations and further hamper the image of some bus lines and bus travel generally.

Station closings in Cincinnati and Columbus, OH; Chattanooga, TN; Houston, TX; Knoxville, TN; Little Rock, AR; Louisville, KY; Philadelphia, PA; and Tampa, FL, resulted in relocations to spaces with far fewer conveniences, public transit connections, and amenities. In most cases, municipal governments did little, and in some instances were openly hostile, to efforts to find a new location. This year brings fresh concerns that Chicago, IL; Cleveland, OH; Dallas and El Paso, TX; Kansas City, MO; Orlando, FL; and Richmond, VA, will be next.

Some of the threatened stations came into the fold of a private real estate holding company after Greyhound's



A Lamers Connect coach from Dubuque, IA boarding at Milwaukee Intermodal Station on November, 2023. The route is part of Wisconsin's expansive state-supported system.

sale to FlixBus. When FlixBus purchased the Greyhound bus operation in 2021, it did not acquire some privately owned stations. Many stations were later sold by the company that previously owned Greyhound to the real estate company. During this same period, "not in my backyard" opposition to bus stations grew.

The next 12 months will test the mettle of some bus lines and the passengers they serve. Not only will new problems emerge, but crowding and poor conditions at

some replacement stations and curbside spots will become more problematic as traffic rebounds and during weather events. Government agencies will feel pressure to put adequate station facilities on their agenda. They can learn much from the state agencies in Georgia and Michigan, which have made bus-station arrangements a focal point, or from the 15 metro areas that rank among the 25 largest in the U.S. that have taken steps to give privately run intercity bus lines the ability to use transit hubs, railroad stations, and other suitable locations. (See our summary of metro areas on page 8 of [this report](#)).

Prediction 3: Public policies will gradually swing in the industry's favor as the growing hardships facing disabled and lower-income travelers on long-distance trips and the success of state-supported bus systems reduce the indifference toward bus travel among many public agencies. Federal resources and new tools showcasing the importance of the U.S. intercity bus network will augment this trend.

The negative publicity generated by the shuttering of traditional Greyhound stations, the growing push for equitable (and eco-friendly) transportation, and the rising visibility of state-supported bus networks put intercity bus travel in the spotlight. Skepticism about whether intercity bus service should concern public agencies is diminishing as awareness grows of smartly branded intrastate networks, such as Bustang, GoBus, and Virginia Breeze. Moreover, federal funding through the 5311(b) program lowers the hurdles faced by states seeking to improve mobility in rural areas.

New information that helps advocates make the case that the bus network should be preserved is becoming available. Greyhound's surveys of riders show that more than half of trips involve visits to family and friends, with many trips having several purposes, and buses serve a wide range of income groups, including many moderate- and lower-income households. This data shows that the average trip length on Greyhound is more than 250 miles, and most trips involve travel in more than one state. For example, over eight months, travelers from Columbia, SC, traveled to more than 400 destinations, which indicates that passengers benefit from the extensive system of connections between lines.

Another significant development is Transcor Data Services' [Network Transportation Information](#) tool. This creates digital maps showing the routes and station stops for more than two dozen lines, including major brands such as FlixBus, Greyhound, and Megabus, and there are plans to add public transit routes. The tool helps planners evaluate the breadth of the country's bus network.

These developments, along with the advocacy efforts of the United Motorcoach Association, the American Bus Association, and the Bipartisan Infrastructure Bill, discussed below, hold promise for a more favorable era of public policy for intercity bus lines.

Prediction 4: Improvements to the FlixBus/Greyhound, Megabus, and Trailways booking platforms will help attract new traffic. More itinerary options, reserved seating, bus-tracker tools, and other conveniences are giving consumers better choices. Still, finding the best schedule option remains far more cumbersome than air or rail travel.

Many consumers feel overwhelmed at the prospect of searching among the dozens of bus lines that offer scheduled service to find the best options. New marketing alliances, however, have helped reduce the industry's level of fragmentation. Most significantly:

1) FlixBus and Greyhound have centralized their management and planning activities, and their respective services now appear on each other's websites (which are almost identical). The two brands also now universally offer connections between their services when operating from the same station. The relocation of FlixBus to Greyhound locations in many major cities, including Boston, Chicago, Houston, Indianapolis, and Washington, is helping this effort. FlixBus and Greyhound customer policies have also been standardized, each having, for example, reserved seats and common baggage rules.

2) Megabus's booking platform greatly expanded its offerings last year. The megabus.com route map stretches almost from coast to coast, save for a gap between Denver and Salt Lake City. Late last year,

Megabus began selling many more itineraries involving transfers between its buses. Passengers can now buy a New York – Miami ticket with a change of buses in Washington, DC, Atlanta, GA, and Orlando, FL. Although



In early 2023, a Tornado bus from Dallas, TX has arrived in Chicago. The line, which caters to Spanish-speaking travelers, has two daily trips on the route.

the options displayed with transfers are primarily limited to Megabus-branded services, itineraries involving transfers between it and its independent partners are likely around the corner.

3) Trailways added numerous lines to trailways.com and trailways.ca last year and has announced an alliance with FlixBus-Greyhound that puts each other's services onto their respective booking platforms. Travelers could again be able to buy tickets that involve, for example, transfers between Greyhound and Peter Pan. The alliance will likely create many new itinerary options, particularly in the Northeast.

Many advances in ticket technology have been made possible by the new **Multi-Modal Cloud** (MMC) system developed by TDS. Of course, offering new schedule options that require transfers necessitates that bus lines deal with late-arriving buses, cancellations, customer confusion, and other issues at transfer points. The ability of some lines to do this successfully is unclear, mainly due to the loss of so many traditional stations.

Metasearch travel websites, including [busbud.com](#) and [wanderu.com](#), are pivotal to making travelers aware of the new schedule options, allowing them to comparison

shop, and providing customer support. These sites serve a role in bus travel akin to that of Travelocity in air travel and car rental. Wanderu.com, which marked [its 10th anniversary](#) last year, has more than 500 partners worldwide that provide bus and train services.

Busbus.com specializes in intercity bus travel, partnering with several thousand bus companies across the globe.

Still, many travelers will need to check several websites before purchasing tickets; even then, some will doubt they have explored all the options. When booking trips involving several carriers, many will wonder if someone will help them if they miss their connecting bus. Rural and regional lines and small carriers catering to Spanish-speaking populations will remain particularly hard to find. This puts bus travel at a continuing disadvantage to driving and air and train service (for which nearly all domestic options are presented in one or two places). Fortunately, though, the gap is diminishing.

Prediction 5. Increases in fares will outpace inflation in the next several years, improving profit margins. Rising load factors and the strong demand for travel this past holiday season indicate that carriers will have more pricing power than in the past.

Average prices (in 2023 dollars) fell from \$77.08 in 2017 to averaging just \$54.12 during the pandemic in 2020 before recovering to \$73.47 last autumn for reservations made more than a month in advance. This finding is based on a sample of 320 routes we have been monitoring, involving distances of 80 – 450 miles.¹³ Most require transfers at intermediate hubs and lack much bus or rail competition.¹⁴ Our interview with industry officials corroborates these findings, who note that the revenue recovery has outpaced ridership recovery due to increasing ticket prices.

Since early autumn, significant increases in fares have become more common. We found that at the height of the Christmas travel season, fares were 15% higher on average than during a slow period in September.¹⁵ Bus lines are becoming more aggressive, with fares for last-

minute buyers comparable to airfares bought well in advance. The ability of bus lines to increase fares during peak time is abetted by the problems airlines have adding flights in proportion to the growth in customer demand.¹⁶

A pattern has also emerged among some lines to raise fares while meeting the needs of price-sensitive customers by having periodic sales promoted via texts or emails. Salt Lake Express's online promotions offering discounts of up to 30% may be a glimpse of things to come.

Despite the recent increases, most bus fares are well below Amtrak's and less than half the cost of flying for bookings a few days before departure. We remain skeptical that pricing power will continue unabated. Pricing market thresholds, inflation perceptions (and realities), and state-supported rail pricing could all impact the pricing power of bus lines, at least in specific situations.



Passengers at Milwaukee Intermodal Station board a bus for Chicago in September 2023.

Prediction 6. Cooperation between Amtrak (and its state supporters) and intercity bus lines enters a new and more exciting phase as carriers and policymakers harness the benefits of further integrating these modes. Such integration will be enhanced by the Bipartisan Infrastructure Bill, which will encourage state

and local governments to plan for better bus and train services in tandem.

In the recent past, the *competition* between bus lines and Amtrak has been a far more significant force than *cooperation* between them. Bus lines in Amtrak corridors with four or more daily trains, comfortable stations, and attractive fares have faced solid headwinds to expansion. Chicago, IL – Milwaukee, WI, Raleigh – Charlotte, NC, Portland, OR – Seattle, WA, and intra-California routes are cases in point. In each case, bus options are primarily limited to FlixBus-Greyhound. In the Northeast Corridor, intercity bus services thrive despite abundant train service, in part due to the enormity of the market and the tendency for Amtrak fares to be set far higher there than elsewhere.¹⁷

However, the symbiosis between bus and train services is poised to grow as more governments tear down the barriers between them. In California, Oregon, Pennsylvania, Washington, Vermont, Wisconsin, and other states, bus services are listed alongside trains on

amtrak.com. The Bipartisan Infrastructure Bill will encourage more integration of lines. Although that legislation will spur numerous competing train services, investments in terminals, public transit systems, and supplemental bus service make it a “net plus” for intercity bus lines. This and the growing state-government emphasis on publicly supported bus service, stimulated by federal (5311b program) funds, sets the stage for new strategies integrating bus and rail offerings.

These trends suggest 2024 will be an exciting year for the bus industry. Yet, it will also be harrowing due to escalating bus station problems as millions more travel by bus.

The study team invites readers to sign up for *free Intercity Bus E-News*, which is prepared bi-monthly by emailing chaddick@depaul.edu. [Click here](#) for info on a webinar on February 22, 2024.

Appendix: Schedule Frequency, Major US Routes, Off-Peak Season

This table shows the daily schedule frequency in early 2023 for some of the routes mentioned in this report. Service to certain outlying points of the metropolitan regions is not included. Some lines dramatically expand service during busy periods in a manner not captured and may add trips to meet demand. Totals may also be affected by sold-out buses that disappear from schedules.

Daily Frequency between Metropolitan Regions

Route	Bus line or brand	Friday, Jan. 5	Saturday, Jan. 6	Monday, Jan. 8	Monday, Jan. 22	Friday, Feb. 23
Major Intercity Corridors						
Boston - New York	FlixBus	22	21	21	22	22
	Greyhound	10	10	9	9	9
	Peter Pan	12	9	8	8	12
	OurBus	4	3	2	2	5
	Go Buses	2	2	2	2	2
	Coach Run	2	2	2	2	2
	New York- Washington, DC	FlixBus	21	21	23	19
<i>(Several lines not serving points within Washington city limits excluded)</i>	Greyhound	14	13	14	14	14
	Peter Pan	8	6	5	5	8
	Megabus	22	24	15	12	18
	OurBus	5	3	4	4	NYP
	Washington Deluxe	5	2	5	5	NYP
	Wanda Coach	6	5	5	5	6
	BestBus	4	2	4	4	5
Los Angeles - Las Vegas	FlixBus	4	4	4	4	4
	Greyhound	6	6	6	6	6
	Tufesa	3	3	3	3	NYP
	Las Vegas Shuttle	4	3	4	3	3
	Limousine Express	1	1	1	1	1
	Dallas - Houston	FlixBus	7	6	5	5
	Greyhound	7	7	7	7	7
	Red Coach	4	3	3	3	4
	Megabus	4	2	0	0	4
	Los Angeles - Oakland	FlixBus	5	5	2	4
	Greyhound	3	3	3	3	3
Indianapolis - Chicago	Greyhound	6	6	6	6	6
	Flixbus	4	4	4	4	4
Chicago - Detroit	Greyhound	3	3	3	3	3
	Flixbus	1	1	1	1	1
Portland- Seattle	FlixBus	6	7	7	6	6
Texas/Mexico Border Routes						
Laredo, TX - San Antonio	Greyhound	7	7	7	7	7
	Tornado Bus	4	3	3	6	6
Laredo, TX - Houston	Greyhound	3	3	3	3	3
	Tornado Bus	3	2	4	3	3
McAllen, TX - San Antonio	Greyhound	6	6	5	5	5
	Tornado Bus	1	1	1	1	1
McAllen, TX - Houston	Greyhound	4	4	4	4	4
	Tornado Bus	2	2	2	2	2

NYP = Full schedule not yet posted. Note: FlixBus and OurBus are booking platforms. Reflects schedules on 1/3/23

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

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ENDNOTES

- ¹ Megabus has a stated policy, noted in *Megabus: 9 things to Demand from your Transportation Partner*, that “At Megabus. Your routes will be exclusive on our platform. If a customer is looking for a trip from point A to point B in your areas on megabus.com, they will only see your scheduled route. If there is an opportunity to add a similar route, we will give you a right of first refusal.”
- ² An OurBus option is available on the New York – Albany, NY, route but apparently only on select days, based on a review of schedules on its booking platform.
- ³ Wanda Coach appears to be a booking platform rather than a carrier with operating authority. For a summary of routes from New York’s Chinatown neighborhood, see our *2022 Outlook* report, available [here](#).
- ⁴ Ithaca’s policies generated a lawsuit, as described in an Ithaca Journal article published in 2019: <https://www.ithacajournal.com/story/news/local/2019/04/03/city-ithaca-named-federal-lawsuit-over-intercity-bus-permits-and-fees/3340301002/>
- ⁵ See footnote 3.
- ⁶ The authors thank Doris Green, Regional Mobility Manager, Delta Rides, for this information. Additional information on Delta Rides is [here](#). Ms. Green can be reached at 662-846-6161.
- ⁷ Amtrak exited Louisville in 2003 and Nashville in 1979, with Megabus exiting those settings just before the pandemic.
- ⁸ Amtrak and VIA Rail Canada are exploring reviving Chicago – Toronto rail service in this corridor, occasioned by the recent merger of Canadian Pacific and Kansas City Southern railroads, which may permit revived passenger use of the Detroit – Windsor tunnel. We thank Mike Weinman at PTSI Transportation for this insight.
- ⁹ For a discussion of the state’s plans, please refer to this Vermillion Plain Talk article from November 3, 2023. https://www.plaintalk.net/local_news/article_fc797a18-79bf-11ee-b873-9bfb426ef23c.html
- ¹⁰. Our schedule analysis indicates that Megabus will not be operating on certain off-peak days during January, which tends to be a lightly traveled month. See Appendix.
- ¹¹ Our schedule analysis indicates that FlixBus and Greyhound advertise identical arrival and departure times and have identical prices on several routes from Laredo and McAllen during January 2024 on the greyhound.com website. This pattern suggests that travelers booking a FlixBus option could travel on a Greyhound coach.
- ¹². For a discussion of the Denver program, please refer to this Colorado Sun article from September 21, 2023. https://www.bing.com/search?q=denver+purchased+tickets+for+6%2C739&cvid=1400bc5b78aa42f8a65246aef9bb531&gs_lcrp=EgZjaHJv bWUyBggAEEUYOTIGCAEQABhAMgYIAhAAGEAyBggDEAAYQDIGCAQQABhAMgYIBRAAGEAyBggGEAAYQDIGCACQABhAMgYICBAAGEAyBwgJ EEUY_FXSAQg1NTU3ajBqOagCALACAA&FORM=ANAB01&PC=U531
- ¹³ Please email the study team to receive our research poster summarizing these findings, which were presented at the 2024 Transportation Research Board Annual Meeting.
- ¹⁴ In nominal terms (unadjusted for inflation), fares rose from \$64.16 to \$73.72 over the six years. Fares bottomed out during the pandemic year 2020, averaging just \$54.12.
- ¹⁵ Our analysis considers only fares for the fastest available schedule options on a particular travel date, which is only one aspect of pricing.
- ¹⁶ For example, a typical one-way fare from Los Angeles to San Francisco is around \$114. Traveling from a south Texas border town to Boston could cost more than \$500.
- ¹⁷ Bus lines compensate for longer travel times with lower fares and many big-city pickup and drop-off options (see our 2019 analysis [here](#)). Yet, there are few corridors outside the NEC and California in which high-frequency Amtrak service is pervasive, which creates openings for bus service.

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