



Stepping Up Service

2025 Outlook for the Intercity Bus Industry in the United States

The Chaddick Institute's Annual *Intercity Bus Review* | February 6, 2025

By Joseph P. Schwieterman and Zaria Bonds

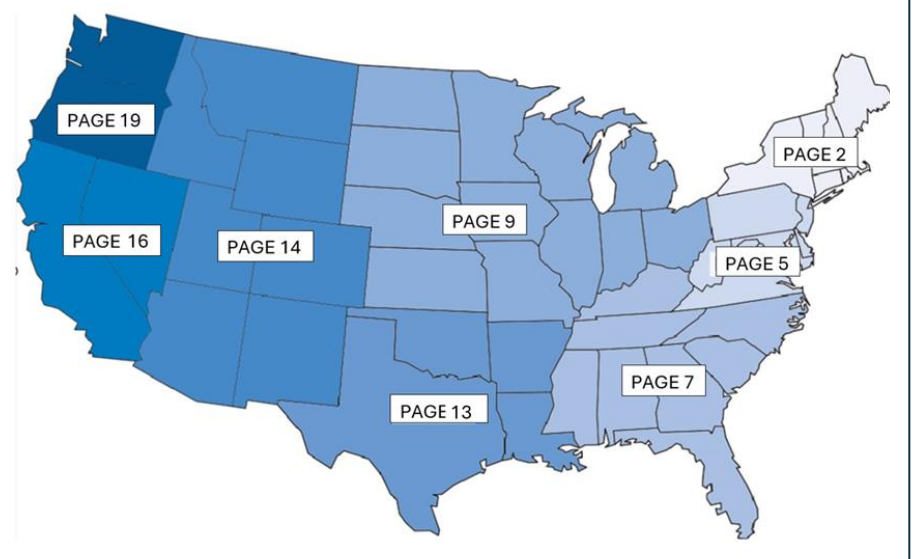
Last year, major bus lines briskly expanded on the country's busiest corridors and rolled out more technologically advanced coaches while putting less emphasis on thinly traveled routes. FlixBus grew sharply while prioritizing the densely traveled routes in the Northeast and warm-weather regions, giving it the most frequent service on many routes. Peter Pan, RedCoach, and Trailways carriers undertook sizeable expansions, some focusing on routes vacated by Megabus after Coach USA's bankruptcy.

Hispanic-focused lines grew to a dominant position on several major corridors in the Southwest. Meanwhile, numerous state bus systems set ridership records, with Colorado's Bustang a star performer.

Stepping Up Service highlights these and other notable developments of 2024 by region. **On page 20, we review the biggest trends and provide predictions.** We exclude most airport

and campus shuttles and rural lines from our review, focusing on more conventional offerings, both operating carriers and contracted offerings by booking platforms.

Turn to the page number for coverage of a geographic region



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Photo caption (above): FlixBus at San Jose, CA, January 2025

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How Many Buses Operate Between Cities? Why We Keep Track

This year's *Outlook* offers a more extensive look at service levels on major routes than our past reports. These estimates stem from our comprehensive review of January and February 2025 schedules summarized in our **U.S. Intercity Bus Schedule Frequency** report, [available here](#). Although our schedule review may not capture some nuances or the seasonal patterns of bus service, it provides a first-of-a-kind look at the industry's competitive landscape (at least since Russell's Guide offered this information on an industry-wide basis). We have worked to overcome the complications of making accurate measurements from online booking sites, such as when the same coach appears multiple times in search results due to different stop options. The figures presented reflect service *in each direction*. Due to schedules being dynamic, services may have recently changed.

NEW ENGLAND & NEW YORK STATE

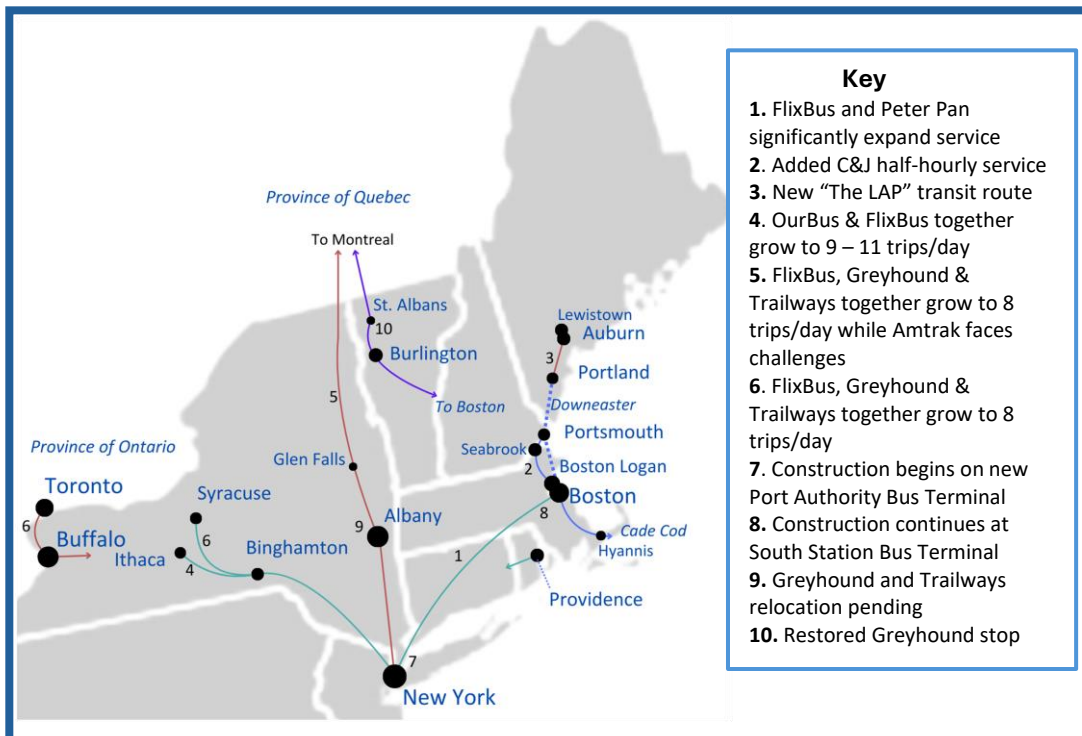
New England's intercity network grew stronger last year due to significant service expansion at two major hubs, Boston's South Station Bus Terminal and Boston Logan International Airport. Many buses serve both locations, which are only four miles apart, giving travelers a greater range of schedule options than most other metro areas. South Station's role greatly expanded after FlixBus consolidated activity there in 2023.

The hotly contested Boston – New York route is a case in point. The three largest providers use South Station Terminal. **FlixBus** and its sister company, **Greyhound**, which was acquired by FlixBus in 2021, have 27 and 14 trips in each direction, respectively, on busy days.

Our review shows that FlixBus has grown roughly 20% since early 2024. Its 27 trips are the most frequent on this route and the second highest frequency by any bus line on a US route over 200 miles, topped only by its 29 trips from New York to Washington, DC. Additionally, several schedules operate via a new route through Storrs, CT, home of the University of Connecticut.

Peter Pan grew sharply from around a dozen to 14–15 daily trips to New York and has routes from South Station Terminal in many directions. Having a smaller presence, **GoBuses** makes two trips from Cambridge, MA, and **OurBus** (a booking platform) makes a similar number on busy days, most originating in Boston's Back Bay area. Finally, niche player **Coach Run** often has a pair of trips from a curb on Huntington Avenue.

Cumulatively, these six providers offer 64 daily trips in each direction on busy days, totaling more than 3,200 daily seats. Based on our review, Boston – New York service increased around 20% from a year ago. Plus, there are nine separate trips daily on the Providence, RI, – New York route, where Peter Pan (5) is the frequency leader. All bus lines benefit from Amtrak's premium pricing,



which can push peak hour and weekend Boston – New York fares to more than \$175 (or more for Acela premium higher speed service), three or four times bus fares. South Station’s expanded role has been coupled with fewer curbside departures in the Boston area.

Boston Logan Airport, meanwhile, continues to have the most intercity bus departures of any U.S. airport. Its curbside stops at multiple terminals, each near baggage claim, give bus travel significant physical visibility among flyers leaving the terminals. **Concord Coach** and **Dartmouth Coach** (under common ownership), **Boston Express**, and **C&J** link the airport to Maine, New Hampshire, and Vermont, using full-size motorcoaches, each offering half-hourly service at certain times, with more trips also serving South Station.¹ C&J expanded its half-hourly offering to Seabrook and Portsmouth, NH, and added a 1 am trip from Logan last year. C&J is renovating the two New Hampshire terminals and will soon roll out a bus tracker.



A Peter Pan bus is boarding at Hyannis Transportation Center in July 2024. Plymouth & Brockton, local and regional transit, and the seasonal *Cape Flyer* train to and from Boston, also use the center.

Logan’s intercity bus lines face competition from Amtrak’s *Downeaster* between Boston and Brunswick, ME, offering five daily trips. Still, there is much bus-train synergy. Buses allow quick connections to Amtrak’s Northeast Corridors train at South Station. (The *Downeaster* does not allow this due to its use of Boston North Station). Plus, there are no outbound trains from Boston between 5:20 and 10:30 pm, making buses critical for those with specific schedule needs.

Synergy grew with last year’s launch of “**The LAP**,” a new intrastate bus route funded by the State of Maine linking Lewiston and Auburn with the Portland Transportation Center, a transfer point for *Downeaster* trains and buses to Boston and New York. LAP’s schedule shows 13 weekday trips in each direction and nine weekend trips over a 40-mile route. Concord Coach phased out its Lewiston service roughly the same time the new service started.

Peter Pan and **Plymouth & Brockton Bus Lines** link Logan to points in other directions, including Cape Cod and Falmouth, MA. Both have rebounded strongly from the pandemic. P&B boasts the most service from Logan to the Cape, but Peter Pan has more routes, including service to New Bedford and Springfield, MA. The state of Massachusetts, meanwhile, added several [new inter-regional](#) bus routes last year, including Greenfield – North Adams and Northfield – Pittsfield.

New England’s premium service has held steady, with Concord Coach, Dartmouth Coach, and C&J continuing business class services from New Hampshire and Maine cities to Midtown Manhattan. (Concord and Dartmouth use curbside stops in east Midtown and C&J uses the PABT.) These services, provided on coaches configured to 2x1 seating, bypass Boston and benefit from the absence of thorough train service from those states to New York.

Update New York and Canada. The competition on intrastate New York trips we observed last year has intensified. New York – Ithaca (Cornell University) service is particularly dynamic, with OurBus now having four to six trips on busy days and FlixBus five, with Trailways of New York (which includes Adirondack and New York Trailways²), ShortLine and Cornell’s [C2C](#) Shuttle also offering direct service. New York – Syracuse has even more service on busy days, divided between FlixBus (7), Greyhound (6), **Trailways of New York** lines (4), OurBus (1–2), and Amtrak (4).

Substantially lengthened schedules (and multiple service cancellations) on Amtrak’s *Adirondack* resulting from various rail-related restrictions provided an opening for more New York – Montreal, QC, bus service. **Trailway of New York**, **FlixBus**, and **Greyhound** cumulatively grew

to eight trips on busy days, an increase of several buses from two years ago. Many buses make the trip in around 9 hours and 15 minutes, about three hours faster than the train. As part of the Montreal expansion, Greyhound, after almost 30 years of absence, returned to St. Albans, VT, over a route originating in Boston.

These same three lines dominate the New York – Toronto, ON, route. Due to Trailways of New York’s



A C&J coach heads to Boston Logan Airport. Inset: A traveler on one of C&J’s premium coaches used on the New Hampshire – New York route.

expansion following Megabus’s withdrawal, each now has several daily trips. Within the Province of Ontario, OurBus launched the Ottawa – Toronto, ON, service, possibly spurred by Megabus’s cuts. Besides the above changes, however, relatively few significant schedule changes came to our attention. Yet, fleets are being upgraded. Peter Pan is expanding and modernizing its fleet and received an American Bus Association [Leadership in Sustainability Award](#), while Greyhound acquired 60 new buses, primarily for the Northeast (see page 21 for more on new motorcoach purchases).

New York’s on-again, off-again push for congestion pricing has ended with a mostly favorable outcome for intercity lines. Initially, fees as high as \$35 per bus trip were proposed, but after much pushback, regularly scheduled buses were exempt. After being postponed, the program was revived early this year with lower fees, with most scheduled buses still exempt.

The City of New York began [buying bus and plane tickets](#) to transport migrants *out of town*, often back to Texas,

in retaliation for the State of Texas’s practice of sending migrants to New York via charter bus. Around 4,500 tickets have reportedly been purchased for migrants to leave New York, in some cases to Chicago and Florida.

Station News. New England has largely avoided the problem facing other regions regarding closing traditional bus stations. However, the Greyhound Station in Albany, NY, has been sold for redevelopment, although it remains in use. Some regard its brutalist architecture as an eyesore. Adirondack uses a temporary terminal adjacent to the Greyhound terminal, but the city is reportedly examining alternatives for both. Additionally, South Station Bus Terminal is undergoing a major [improvement](#) linked to a new office building being built over railroad platforms. This will expand the terminal’s footprint by 50% and allow for improved transit connections at South Station. After some delays, completion is expected this year.

Concord, Dartmouth, and C&J continue to maintain and improve dedicated stations in the region, each with staffed ticket counters, long-term parking, vending, and spacious waiting areas. Hyannis’s state-run Transportation Center is a multimodal showpiece, serving local and regional transit, intercity buses, tour trains, and the seasonal *Cape Flyer* train to and from Boston. It is in walking distance of the ferry terminal serving Martha’s Vineyard and Nantucket.

The first phase of rebuilding New York’s Port Authority Bus Terminal is underway. This includes a deck-over of Dyer Avenue to enable bus service to continue during construction, though concerns about the effects of constrained station capacity during subsequent construction phases have been voiced. The expected completion date for the \$10 billion project remains unclear, but it is well into the future.

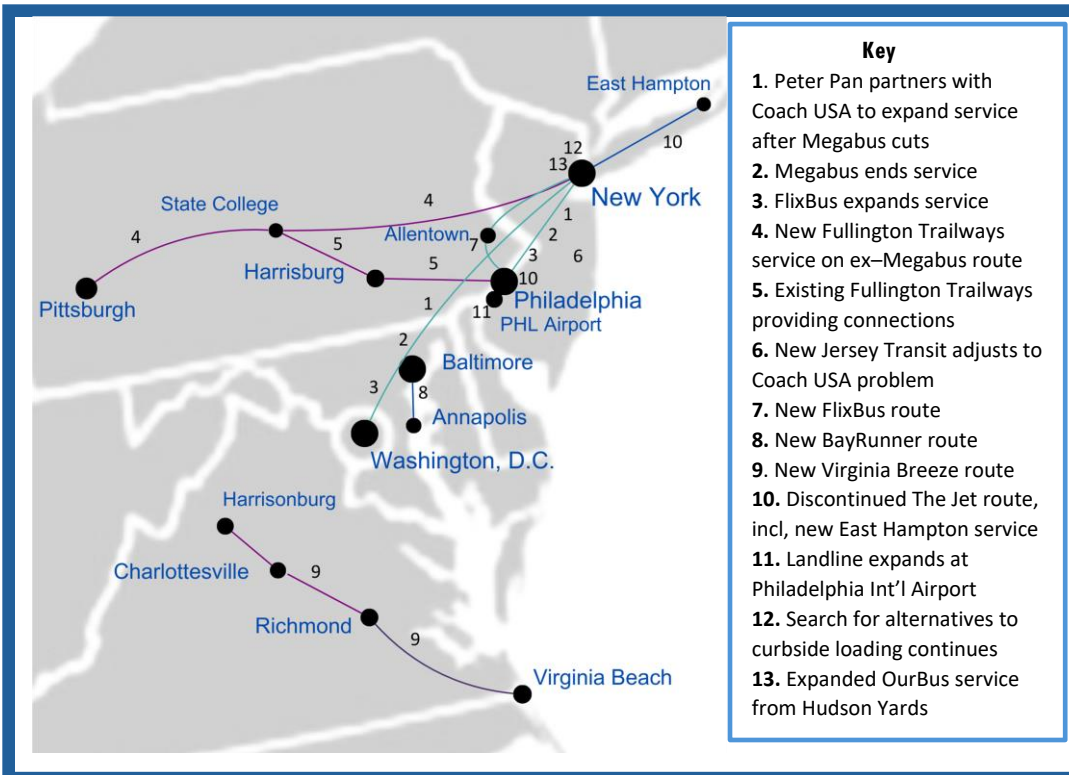
MID-ATLANTIC, INCLUDING VIRGINIA

Bus travel on the southern half of the “Acela Corridor” from New York to Washington, DC, had its biggest shakeup in years following last summer’s Coach USA bankruptcy. Megabus, a mainstay since 2008 with wide brand recognition, dropped its service roughly the same time as the filing. This reportedly resulted in Megabus Northeast LLC unit [laying off](#) 101 workers and selling its familiar fleet of double-deckers.

Competitors almost immediately filled the void. By late summer, **Peter Pan** had arranged with Coach USA to tap into the **Megabus** customer database and boost its schedule frequency. After reportedly hiring 75 new drivers and purchasing many new buses for the expansion, it increased its New York – Washington, DC, (NY – DC) service to around 23 trips in each direction on busy days, up from eight early last year, based on our review. Peter Pan now has more service than **Greyhound** (14) and trails only **FlixBus** (29) in peak-day

Philadelphia, Washington, DC, and other points from this West Side location. Smaller lines are also part of the NY – DC mix. Washington Deluxe, once a powerhouse, remains affiliated with Tripper Bus and has several daily trips to Dupont Circle but does not run during the midweek.

Total NY – DC trips, counting only services terminating within the municipal limits, diminished slightly because FlixBus and Peter Pan’s added trips were slightly less



than the dropped Megabus service. We estimate 76 buses run daily, down about five (6%) from last year.

The New York – Philadelphia (NY – PHL) route has followed a similar pattern as NY – DC. Based on our review, Peter Pan expanded from 11 to 16 trips on busy days, giving it roughly the same service as Greyhound (18) and leaving it behind only FlixBus (25), which was on the move,

service, the latter of which also grew, adding seven trips, a more than 25% year-over-year increase. Like Greyhound, Peter Pan links New York’s Port Authority Bus Terminal to Washington Union Station. The Massachusetts-based carrier sells tickets on megabus.com and trailways.com, strengthening the booking sites’ prominent roles in the Northeast.

OurBus (the booking platform) offers several trips on the NY – DC route on busy days. The company took advantage of Megabus’s exit from the New York Hudson Yards area by consolidating several New York–area services at the former BoltBus stop on 11th Avenue between W. 35th and W. 36th Streets, across from Javits Convention Center. Some of these services had previously used the more outlying George Washington Bridge Station. This gives OurBus more options to

adding seven to eight trips. **Panda Bus**, **Wanda Coach**, serving New York’s Chinatown, and OurBus often have three to six daily trips. This makes the route unique for *six* players with 3+ trips. Another beneficiary of Amtrak’s comparatively high fares and restrictions on changes after ticketing (and, to a lesser extent, the restrictions imposed by bus lines) has been the New Jersey Transit/SEPTA connecting local train service via Trenton.

Outside the Acela Corridor, **Fullington Trailways** launched service on the ex-Megabus route from New York to Pittsburgh, PA. Fullington, which had less overlap with Megabus, worked with Coach USA to create a service via State College, PA, home of Penn State University. The only other direct New York – Pittsburgh bus line with daily service is Greyhound, which has six trips on busy days.³ (FlixBus no longer serves the Steel City). Fullington also began running its

Philadelphia – Harrisburg – State College service more days a week, allowing efficient connections with Amtrak’s *Keystone Service* riders at Harrisburg and Pittsburgh goers at State College.⁴

Apart from these changes, the Mid-Atlantic’s intercity bus map mostly held steady. FlixBus launched New York – Allentown service, a route heavily served by **Trans-Bridge Lines**. The route was later extended to Philadelphia, Washington, DC, and Richmond, VA. This new once-daily service, which runs on the busiest days of the week, creates many connecting options with other FlixBus and Greyhound schedules.



Travelers scurry to board two Peter Pan coaches and a Greyhound at the Baltimore Bus Station, January 2025.

In Maryland, **BayRunner Shuttle**, known to many for its service between Maryland’s largest city and the eastern shore, launched a route from Baltimore and BWI Airport to Annapolis. BayRunner’s participation in the national interline bus network with Greyhound and other lines improves schedule options between many U.S. destinations and Annapolis.

The state-operated **Virginia Breeze Bus Lines** is set to launch [its fifth route](#), its first east-west offering this summer. The new *Tidewater Current* will connect Harrisonburg and Virginia Beach with stops in Norfolk, Newport News, Williamsburg, Richmond, and Charlottesville. Virginia Breeze, managed by the state’s transportation department, enjoyed a 10% ridership jump from early 2023 to early 2024 and recently began interline ticketing to North Carolina (see page 8).⁵

The Coach USA bankruptcy created many questions about longer-distance New Jersey Transit routes. However, after much uncertainty, most of the private company’s contracted services continued, although its North Jersey regional and commuter services have been slimmed substantially.

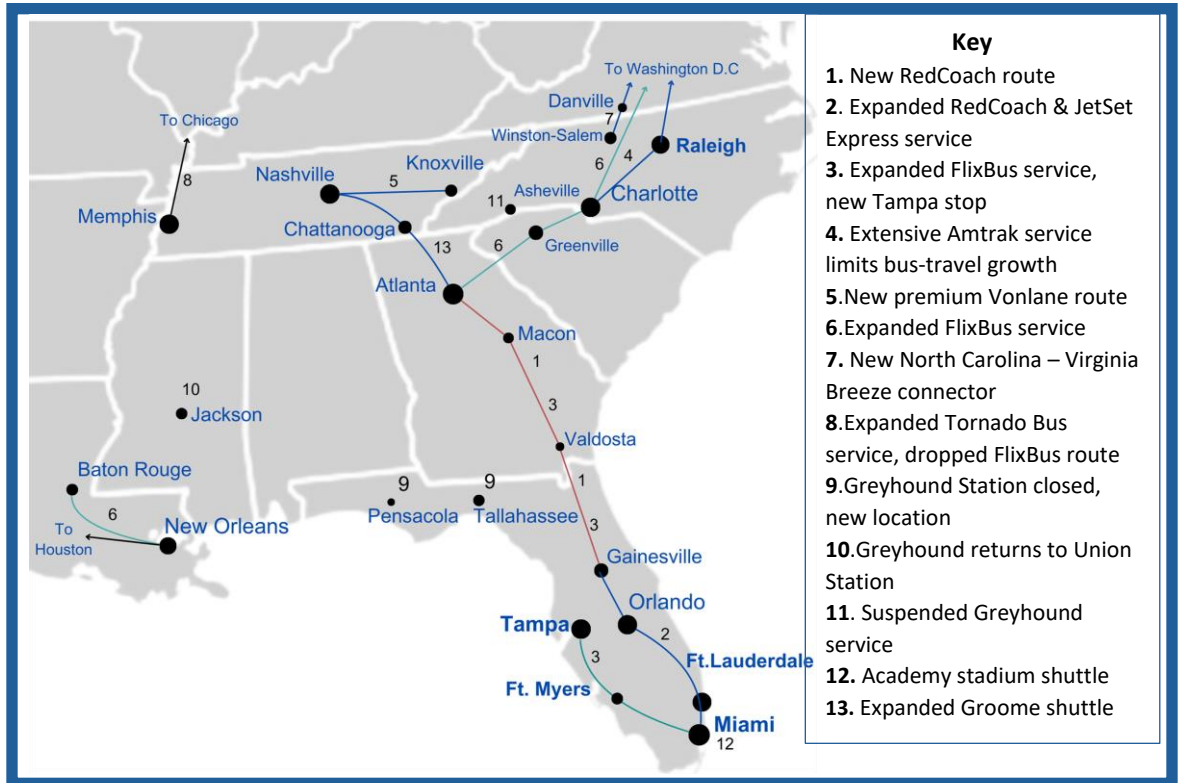
Premium and Airport Service. NY – DC has by far the most premium-service operators of any U.S., but by no means the greatest amount of services offered. **BestBus Prime**, **Tripper Bus Elite**, and **Vamoose Gold** offer more spacious seating than their traditional service, each with 2x1 seating and terminating in the metro Washington suburbs.

Earlier this month, however, **The Jet** was grounded. The twice-daily luxury service between curbside stops in Hudson Yards, Manhattan, and central Washington had recently expanded from four to five days a week. Fares were far above standard bus fares but well below walk-up airfares and most Amtrak fares. The service cancellation came as a surprise because The Jet branched out last year by introducing the *Hamptons Streamliner*. The ultra-premium service, linking Manhattan to Southampton, Bridgehampton, and East Hampton, was part of a partnership with Blade, a global urban air mobility platform with numerous helicopter and jet charter routes. The *Streamliner* ran during summer and offered limited competition to long-standing **Hampton Jitney Ambassador Class** service.

Philadelphia International Airport has become a national leader in bus-plane synergy due to **Landline’s** expanding partnership with American Airlines (see our feature on page 24). OurBus offered service from JFK International Airport to upstate New York universities at peak holiday times last year. Meanwhile, a sizeable network of passenger van services to and from New York airports has emerged (or re-emerged) over the past several years, some originating as far away as central Pennsylvania. These are part of a little-documented phenomenon of scheduled vehicles with fewer than 12 seats popping up in major markets. According to a [busbud.com blog](#), this is also a hot trend in Canada.⁶

Station News.

Philadelphia's struggle with curbside service on the 100 block of Spring Garden Street, used by Greyhound, FlixBus, Peter Pan, and (until recently) Megabus, persists. Philadelphia has extensively explored ways to move buses off-street since the Greyhound Station at 10th & Filbert closed in 2023. Ideas to retrofit parking garages and parking lots for bus service have not yet borne fruit.



Opposition from Chinatown businesses, however, has dimmed hopes of returning to Philadelphia's old station, which still stands. More favorably, Peter Pan attracts many passengers at the former Megabus curbside stop at Schuylkill Ave & Walnut Street near William Gray 30th St. Station. The station area also hosts Amtrak Thruway buses to Scranton and Lehigh Valley points and New Jersey Transit regional buses. Another recent enhancement is Greyhound and Peter Pan's storefront station with separate ticket windows and seating near their Spring Market curbside boarding spots.

In Washington, DC, concerns about the potential relocation or downsizing of the intercity bus terminal at Washington Union Station, which is housed in a parking deck, have diminished, at least temporarily.

THE SOUTH

Population and employment growth in the South are fueling more service expansion than in most other regions. Among the biggest stories from last year was additional FlixBus and RedCoach service on major routes. This more than offset the losses from the mid-year cessation of Megabus services on the most heavily traveled corridors.

Months before **Megabus's** exit, **RedCoach**, a premium brand, rolled out a pair of new daily Orlando – Atlanta business-class trips. This service stops in Gainesville, FL, and Macon and Valdosta, GA, and terminates at Atlanta's Civic Center Station transit hub, thus restoring a similar service briefly offered several years ago. According to our review, RedCoach's 446-mile Atlanta – Orlando and 491-mile Miami – Tallahassee, FL first-class overnight run the only premium "red eye" services in the U.S. Its biggest competition on both routes is from FlixBus and Greyhound, which together have eight Orlando – Atlanta trips on busy days.

The buildup of service on the 230-mile Miami – Orlando route is also impressive, with **FlixBus** continuing to have 13 trips on busy days and RedCoach growing to 7–8 daily, up one or two from a year ago. (See sidebar on page 2 for details on our schedule estimates from selected days). Greyhound remains steady at four, while niche player **JetSet Express** grew from two to three (this is its only route). The capacity loss from the end of twice-daily Megabus service has been fully offset, and there is little sign *Brightline Florida's* rail-service expansion will prompt service cuts, likely due to the roughly three-fold difference in fare and Brightline's capacity constraints (despite its hourly service) until its fleet grows.

Miami – Tampa service grew due to FlixBus's expansion. FlixBus has eight trips on busy days, while Greyhound and RedCoach each have two to three apiece. FlixBus appears to benefit from its recent relocation from a curbside stop at an expressway underpass to downtown Tampa's main transit center.



A RedCoach bus bound for Miami, configured to business class, sees heavy boardings its Orlando Station in October 2024

All of these providers operate from Miami International Airport (MIA), which boasts notable air-bus synergy, much like at Boston Logan. Amtrak, however, canceled its plans to originate its trains at MIA rail station despite substantial investment in this facility. RedCoach, which staggers first-class, business-class, and premium economy buses on busy routes, has a particularly strong airport presence by stopping at Fort Lauderdale/Hollywood International Airport and having a private terminal near Orlando International Airport's main terminal.⁷ The Orlando station is shared with a car rental service, which is a rarity for a dedicated bus station.

Expansions Outside of Florida. FlixBus placed significant emphasis on the Carolinas last year. On busy days, it has five Charlotte, NC, – Washington, DC, trips, with a significant competitor being **Wanda Coach's** three. Its Atlanta – Charlotte service encompasses six trips on busy days, with sister company Greyhound having a similar number. FlixBus's growth on these routes appears to have been partially spurred by Megabus cuts, but FlixBus's commitment to growing in the South, which has an expanding travel market, and Atlanta's

attractive new bus station shared with Greyhound and **Southeast Stages** also appear to be at play.

Competition from trains varies widely between routes. Raleigh, NC, – Washington, DC, service remains dominated by Greyhound's six trips on busy days. Most offer a several-hour time advantage over Amtrak trains.

However, that advantage will end when an abandoned rail route in Virginia is rebuilt for higher-speed running over the next several years.

Conversely, bus lines have shied away from the Raleigh – Charlotte corridor, where there is intense competition from the six daily *NC by Train* services. Riding these state-supported Amtrak trains usually costs \$50 or less, mainly negating the cost-saving benefits of taking the bus. Greyhound has 6 – 7 trips on busy days (one with state financial support), and FlixBus runs once, but several options are in the middle of the night, and there are large gaps at certain times. Rail travel, meanwhile, is setting ridership records.

However, **North Carolina** and **Virginia's** state-supported bus networks are enjoying much success and are regarded as national leaders in publicly financed intrastate bus travel (see our [2024 report](#)). Early this year, the states began offering interline connections between their systems for tickets purchased on megabus.com. This ambitious program allows for travel between North Carolina, Virginia, and Washington, DC on a single ticket. This program was made possible by a January launch of a twice-daily connecting route operated by Sunway Charters from Winston-Salem, NC to Danville, VA, the southernmost point on Virginia's system.⁸ Schedules allow for well-timed transfers at Danville.

The premium operator **Vonlane**, which has an onboard attendant on every trip, offered a periodic Nashville – Knoxville, TN, weekend service last autumn, primarily for University of Tennessee football games. Slated to become a regular service this year, this option complements Vonlane's relatively new routes linking Nashville to Atlanta, GA, and Memphis, TN. The Atlanta route competes with **Groome Transportation's** ever-expanding ATL–BNA Shuttle, which links the two airports with passenger vans 15+ times daily. To our knowledge, this is the highest frequency of any scheduled van service of a route more than 200 miles in the country. The shuttle may be a glimpse of things to

come. Lower-cost options on the three Nashville routes are mainly limited to Greyhound.

A rebound in Louisiana travel has spurred a Baton Rouge – New Orleans, LA, service revival. Greyhound offers seven trips on busy days, up one or two since last year. Combined with FlixBus’s 3 – 4, this gives travelers many options, all using New Orleans Union Station. Later this year, bus travelers arriving at this station can connect to a new twice-daily Amtrak service to Mobile, AL. Train service linking the station to Baton Rouge train service is under development.

In other news, FlixBus’s Memphis – Chicago service has been turned over to Greyhound (see the Midwest section). Greyhound, meanwhile, has suspended service to storm-ravaged Asheville, NC, which it had served from Knoxville, TN. High-profile shootings in the South, particularly in Jackson County, MS, and Memphis, TN, hurt the image of bus travel.

Academy Bus experimented with a new shuttle program for Hard Rock Stadium in Miami, FL, offered in partnership with Uber and Transportation Management Services. Ticket holders can book demand-responsive coach services to area locations after events.

Station News. In Virginia, Richmond’s municipal government approved expanding intercity bus service at a plaza next to Amtrak’s Main Street Station. This will allow the city to close the more traditional Greyhound Station on Arthur Ashe Boulevard. The older station remains in use, but a new location is imminent. The new plaza location, designed for motorcoaches, has been handling intercity buses for some time.

In Jackson, MS, Greyhound returned to the city’s Union Station after much wrangling. Knoxville continues to grapple with bus-stop issues several years after the 2022 shuttering of its bus station. Greyhound moved three times after this before settling into a local transit center, but local concerns continue.

After Chattanooga’s downtown terminal closed in 2023, Greyhound moved about 10 miles to an Exxon gas station in Wildwood, GA, which is still the Scenic City’s main stop. In Tallahassee, FL, Greyhound has moved



Van Galder, a Coach USA subsidiary, is about to depart Chicago Union Station for Madison, WI, in June 2024. Amtrak Thruway shares this bus-only lane.

from its longtime station to the C.K. Steele Bus Plaza. In Pensacola, FL, Greyhound has relocated from its dedicated station near Highway 29 to a Circle K gas station. Such moves to outlying gas stations, especially in prominent cities, may be expedient but risks accelerating the trivialization of the industry in the eyes of the political and decision-making community. Orlando’s Greyhound Station, used by its namesake and FlixBus, seems likely to remain a busy hub for some time despite the recent closing of stations in Jacksonville, Tallahassee, and Tampa.

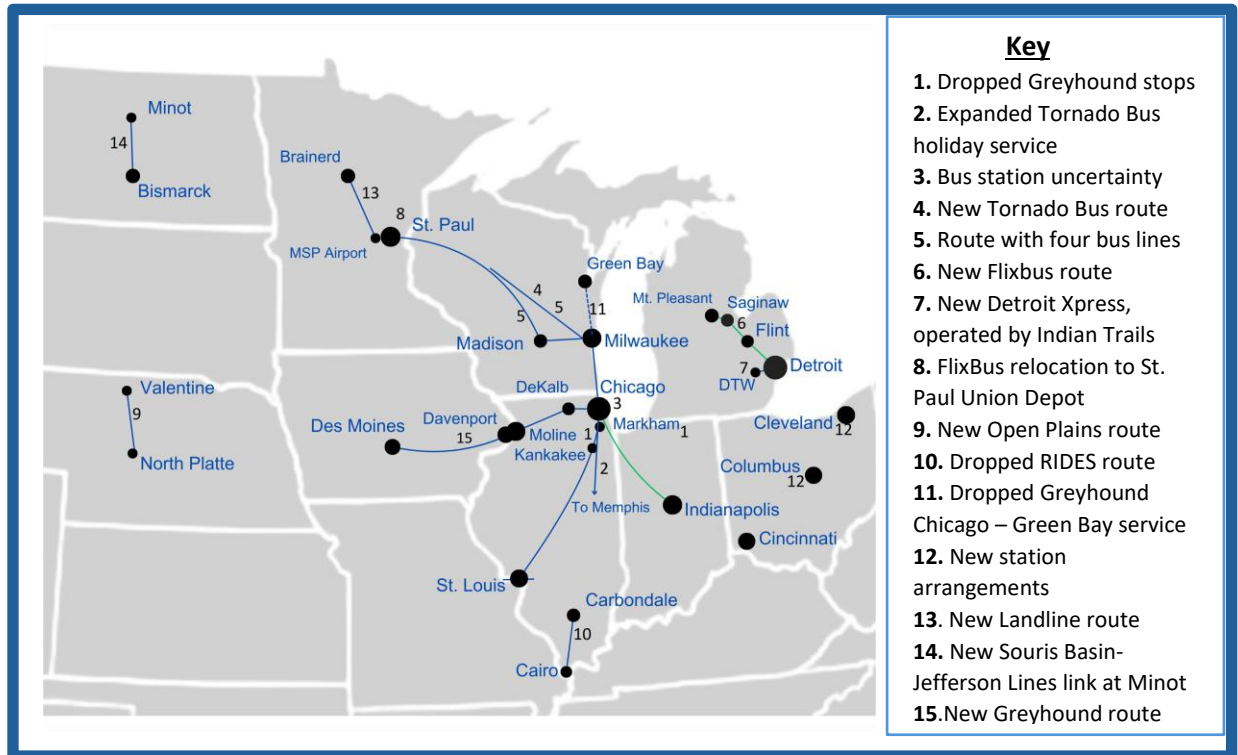
THE MIDWEST

The Midwest intercity bus map regions saw comparatively few changes last year. This was apparently due to the slower-than-normal bounce back of demand and challenging issues related to bus stops. However, favorable station-related developments were on the upswing in 2024’s closing months.

Heavy competition from Amtrak and, in some cases, budget airlines created strong headwinds for bus lines linking Chicago and Champaign, IL; St. Louis, MO; Detroit, MI; and Milwaukee, WI. Each route has three to seven daily trains, most operating with state financial support, allowing for inexpensive train travel even at peak times. Making matters worse for bus lines,

Amtrak’s travel times on the St. Louis route improved due to the added 110 mph mileage.

southbound departures in the early afternoon, resulting in much midday activity at its Chicago station.



Direct bus service from Chicago to Detroit—America’s third- and fourteenth-largest metro areas—remains limited to **FlixBus** and **Greyhound**, which together offer four trips on busy days, all but one Greyhound, the same as last year. The Chicago – St. Louis route continues to have just two, with Greyhound the only direct provider. This remains one of the most notable U.S. corridors in which FlixBus is absent. Greyhound runs via Champaign, which is slightly longer than a previously operated route via Bloomington. Still, one of Greyhound’s schedules quickened last year by eliminating service to Markham and Kankakee, IL, which were stops along the way. The exit from Markham ends more than a century of intercity service in Chicago’s southland.

FlixBus’s Chicago – Memphis, TN, route via Effingham, IL, launched in 2023, has ended, although Greyhound still serves it and has a daily service over a longer route via St. Louis. Tornado Bus, a significant competitor, boosted its Chicago – Texas service with stops in West Memphis from two to three daily on busy days during the Christmas rush. This briefly made the Memphis route a Midwestern rarity for having most of its service run by a Hispanic-focused line. Tornado clusters

Amtrak’s June launch of the *Borealis*, a second Chicago – Milwaukee – Twin Cities train, has surprising upsides for bus travel. The train, while attracting some former bus riders, gives those riding the Amtrak Thruway bus from Nashville, TN; Louisville, KY; and Indianapolis, IN, (operated by Greyhound) transfers in Chicago with several hours less wait time than the older *Empire Builder* connection. Similarly, eastbound travelers now have a St. Paul – Green Bay, WI, trip via a Milwaukee bus transfer that is several hours faster. (Coach USA has a direct and publicly funded St. Paul – Green Bay service via Wausau, WI). Bus services fill a lengthy schedule gap created by the lack of eastbound trains from St. Paul after 11:50 a.m.

The Twin Cities – Milwaukee route still has abundant bus-travel options despite the new train, with **FlixBus**, **Greyhound**, **Jefferson Lines**, and **Tornado** (a newcomer to the route) all offering direct service. Twin Cities – Madison, WI, service, unavailable on Amtrak, is another Midwestern rarity for having four lines: **Badger Bus**, FlixBus, Greyhound, and Jefferson, with Badger linking state-university campuses in Madison and Minneapolis. Less favorably, direct bus service between Chicago and Green Bay has ended due to a dropped Greyhound

route, which was likely spurred by stiff competition from Amtrak Thruway's train-bus connections at Milwaukee.

Amtrak's tri-weekly *Cardinal*, FlixBus, and Greyhound are the lone scheduled ground providers on the Chicago – Indianapolis route. The bus lines, however, now offer a dozen daily trips on busy days, a slight increase since last year. Chicago – Cleveland passengers have twice-daily train service, but at inconvenient hours, and three daily bus trips. Unfortunately, there are no eastbound buses or trains between 7 a.m. and 6 p.m., when many people want to travel.

Last year brought several surprising expansions, including FlixBus's new Detroit – Saginaw – Mt. Pleasant, MI, service, filling a gap in the Greyhound/FlixBus network in the central part of the Wolverine State. Greyhound returned to Des Moines, IA, by extending a Chicago – Quad Cities (Moline, IL) service provided with state support. Competition from trains between Chicago and Iowa is mostly limited to the *California Zephyr*, which does not serve Des Moines. There is no projected start date for Chicago – Quad Cities train service. On the other hand, Chicago – Rockford, IL service, a route that is still a Van Galder Bus Lines stronghold despite the bankruptcy of its Coach USA parent, could begin in two years.

St. Louis continues to be mid-America's primary hub for transcontinental trips, having two and three daily Greyhound runs to and from Los Angeles and New York, respectively, several offering well-timed transfers in Missouri City. However, the transcontinental market is not what it once was. Chicago's direct service to both coastal cities ended years ago.

Rural and Airport Services. Chicago O'Hare's Multimodal Terminal is seeing strong intercity bus ridership. The relatively new terminal on the airport's periphery, which is spacious but lacks seating, is linked by a people mover to O'Hare's terminals and rail rapid transit. **Van Galder Bus Lines** and **Wisconsin Coach Lines** offer extensive service to Madison, WI, and metro Milwaukee, respectively, while **Peoria Charter** offers extensive Champaign, IL, service. Other lines link the terminal to Indiana college campuses, and expanded commuter rail service to downtown Chicago could be coming.⁹ A significant downside of using the terminal is a \$54 tax on

full-size motorcoach departures imposed by the city's convention bureau.



A Greyhound bus for Chicago is boarding at Illinois Terminal in Champaign, IL. Amtrak's platforms are behind the coach.

Detroit Metro (DTW) now has a new motorcoach shuttle pilot, *Detroit Air Xpress*, launched with state financial support between downtown Detroit and the city's international airport. Operated 16 times daily by **Indian Trails**, the service pilot complements the state-funded Michigan Flyer service linking the airport to Ann Arbor, East Lansing, and other points.

Nebraska's **Open Plains Transit** launched a rural route linking Valentine and North Platte last year, [described as](#) "the first-ever north-south intercity bus route through Nebraska's midsection." The 130+ mile route, called the Red Line, runs twice weekly and is made possible by public financial support. Connections can be made to buses to Denver and other points, each at North Platte. Minot, ND's new transit center has become a pickup point for **Souris Basin Transportation** service to **Bismarck**, provided with 9 – 14 seat passenger vans. This arrangement has significantly [increased passenger traffic](#) making interline connections with Jefferson Lines at the state capital.

Other rural operators also made moves. Minnesota's transportation department launched a [pilot program](#) that puts the schedules of 13 rural providers and intercity bus companies onto the Transit App. They include Otter Express in Fergus Falls, Morris Transit, Minnesota River Valley Transit, and the public transit systems in Mankato and Rochester. Several other lines,

including transit agencies for Benzie County, MI, and Cedar Valley, NE, are part of the National Rural Transit Assistance Program's (RTAP's) Community Rides [Grant Program](#), which aims to improve mobility and add capacity. South Dakota's newly completed [Statewide Intercity Bus Study](#) offers a compelling ridership analysis and review of expansion opportunities.

Illinois's **Rides Mass Transit** ended its scheduled Carbondale – Cairo, IL, service, leaving Harrisburg without scheduled intercity service. However, the rural operator still offers extensive on-demand service.

Station News. The Midwest has been “ground zero” for prospective or actual bus station closings, with a half-dozen cities affected. Chicago's Intercity Bus (Greyhound) Station may be on borrowed time. In autumn, FlixBus announced a month-by-month lease extension to give it time to explore options in consultation with the city government, which previously did not appear to make saving it a priority. The station serves FlixBus, Greyhound, Barons Bus, and Burlington

previously not serving the city. Gary is a possible replacement hub for specific services if the Chicago station is lost, although it is questionable if this is an optimal location or facility for such a hub. Adding to Chicago's woes, Peoria Charter was required to move from its longstanding curbside home near Chicago Union Station to an unappealing Interstate 290 underpass several blocks away due to construction. It has appealed to local officials for a better location.

In November, **Barons Bus** and Greyhound will relocate from the historic Cleveland Greyhound Station to the Brookpark Transit Station on the City's Red Line transit route near the city's international airport. (Our review found that the property tax for the downtown station has exceeded \$98,000.) Barons is making preparations for the move to Brookpark.

In Columbus, lengthy legal proceedings between bus lines and the municipal government in response to neighborhood concerns about the city's primary bus station on the west side have ended. The facility, used

by **Barons Bus** and Greyhound, is an important hub for the state-funded **GoBus** system operated by Barons. The bus lines moved to this location at considerable expense in 2023 after they lost access to a downtown station. The agreement allows bus lines to continue using the new station for passenger transfers and ticketing. However, it shifts all originating and terminating traffic to curbside stops at Ohio State University, Columbus's International Airport, and a downtown curbside stop.

St. Paul Union Depot, beautifully refurbished several years ago, is seeing more passenger traffic due to FlixBus's relocation and Amtrak's new *Borealis*. The historic Twin Cities facility also

serves the *Empire Builder* and Coach USA, Greyhound, and Jefferson Lines as well as a light rail line connecting St. Paul with Minneapolis via the university district.



Burlington Trailways on the Indianapolis, IN, – Omaha, NE, route pauses at at Champaign, IL, in September 2024

Trailways and has around 76 daily movements (arrivals and departures combined).

Before the extension, Greyhound service was briefly expanded in Gary, IN, by adding stops on routes

TEXAS & SOUTH CENTRAL

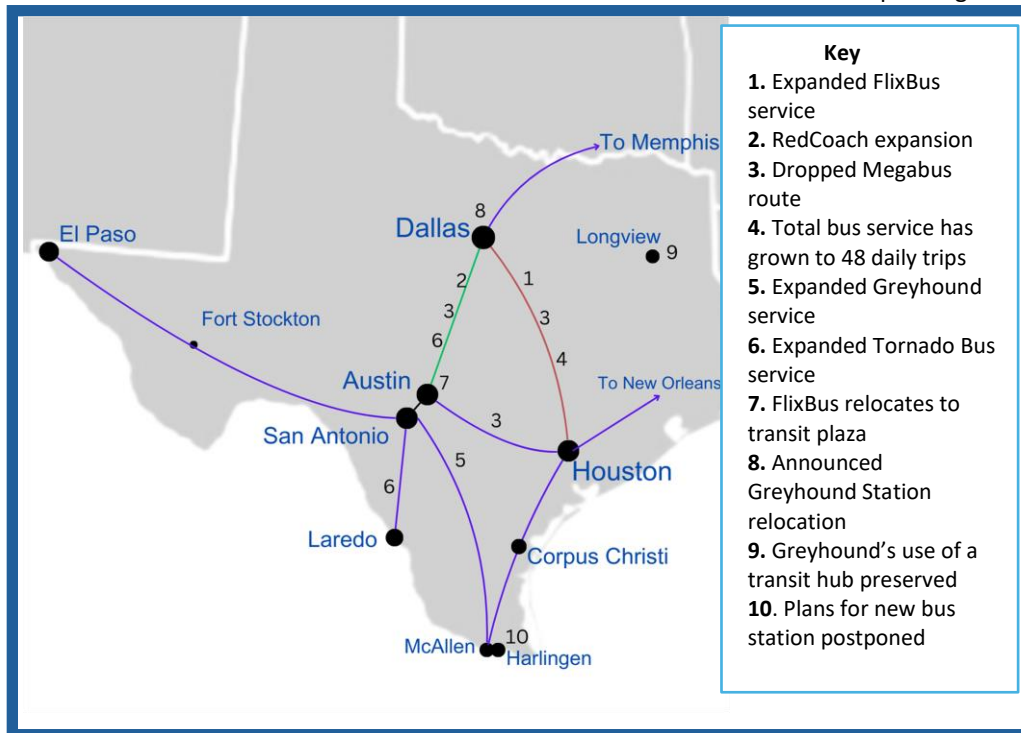
The Texas Triangle, famously giving birth to Southwest Airlines and ambitious proposals for high-speed rail, is now a hotbed for intercity bus expansion. Five major providers—**FlixBus**, **Greyhound**, **RedCoach**, **Tornado Bus** (including **El Espresso**, which has the same owner), and **Vonlane**—all have extensive offerings. Their expansion has far more than offset the modest reductions from last summer’s loss of Megabus service, which, based on our review, had been mostly reduced to Friday–Sunday during its waning months.

A traveler on the Austin – Dallas route can now choose between 42 daily bus trips and one Amtrak train on busy days. FlixBus, Tornado, and Vonlane all have 10–11 buses, while Greyhound has eight and RedCoach a pair. FlixBus mushroomed from a handful of buses daily in late 2023 to its present 10-11. The Hispanic-oriented Tornado, meanwhile, increasingly caters to all travelers. Its schedules, however, tend to be tightly clustered due

Luxury provider Vonlane is in a category of its own, setting prices far above conventional bus fares, even for off-peak trips booked far in advance. Vonlane caters to premium travelers and stands alone for having nonstop Dallas – San Antonio service rather than extending Austin buses to the “Alamo City”, as other lines do. One-way fares are typically around \$125, comparable to advance-purchase airfares but more than twice that of Greyhound.

Vonlane’s onboard attendants serve meals and beverages and make digital tablets and noise-canceling headphones available for free use, thus billing itself as “Elevated Regional Bus Transportation for Discerning Travelers.” Its Dallas stop is at a Hilton Hotel next to Love Field, a Southwest Airlines hub; the hotel has a free airport shuttle. Vonlane made headlines in 2023 by adding 60 weekly Texas Triangle departures, creating a shuttle-type service on all three sides; we found that this was followed by modest growth last year.

Dallas – Austin passenger demand is bolstered by heavy



university-related travel and Austin’s status as the state capital. Dallas – Houston service is less extensive. Still, FlixBus and RedCoach each expanded last year by roughly one bus daily to eight and five trips, respectively, and Vonlane generally has nine. Greyhound (7) and Tornado (2) are also in the mix, while the launch of rail service, while proposed, appears years away (see endnotes¹⁰)

Houston – New Orleans service is less dynamic, but here, too, there has

to being part of longer routes to the U.S./Mexico border, leaving significant gaps throughout the day. RedCoach, having only launched its Texas service in 2019, has been experimenting with new stop locations, and its buses now have three different configurations: first, business, and premium economy.

been a FlixBus expansion, giving it five trips on busy days (but only half that during midweek). A handful of Greyhound runs and Amtrak’s tri-weekly *Sunset Limited* are the only other prominent ground options. Only Greyhound and the *Sunset* cover the sparsely populated stretch from San Antonio to El Paso, TX.

The U.S./Mexico Border Region. Last year, a frenzy of migrant activity, now subject to a new political direction, spurred bus service expansion at the border region. Nonprofit agencies (and some Texas public agencies) have bought many tickets (and chartered many coaches) for asylum seekers from the area to other parts of the country, with Chicago and New York being favorite destinations. Although some nonprofits increasingly turn to air travel, bus service grew markedly.



McAllen, TX, a busy border town, has four to five Greyhound trips on busy days to Houston and San Antonio combined, a roughly one-trip increase from what was observed last year. (These counts include trips by Greyhound's Valley Transit subsidiary). Tornado Bus has two to three trips on these routes, the same as last year. However, measuring Tornado's service levels is challenging due to its practice of adding extra sections when needed. On the Laredo – San Antonio route, Tornado grew sharply, adding two to three daily trips, based on our review, while Greyhound held steady, although Greyhound still has the most departures (7) compared to Tornado's (5).

As a result of these additions, there are now 30 daily buses from these two border towns to Houston and San Antonio on busy days, several more than last year. This does not include less prominent Hispanic-focused lines that do not appear on major booking platforms.

Station News. **Dallas Greyhound Station** is slated to close this year. Greyhound and FlixBus will move to a new facility at Bachman Lake Station, a busy rapid-transit hub near Dallas Love Field, eight miles northwest of the city center. This station has extensive light rail and bus service. A benevolent investor is allowing bus lines to remain at the existing downtown station for the time being to allow for an orderly transition. The new location is set up for off-street boarding and alighting, although the amount of indoor waiting space available to bus passengers is unclear. Dallas sees around 65 daily bus movements.

Since Houston's downtown Greyhound Station closed in 2023, Greyhound has operated from a smaller and more outlying facility in the city's Magnolia Park area. This

Passengers heading to Houston tote their baggage at the Fort Worth Transportation Center, a facility shared with Amtrak, Trinity Rail Express to Dallas, TexRail to DFW Airport, and public transit.

facility is near transit and has indoor waiting and off-street loading but has generated neighborhood concerns. Riders at Longview, TX, reap the benefits of a local initiative that preserved Greyhound's use of a transit hub shared with Amtrak.¹¹ However, in Harlingen, TX, plans for new bus terminals have been tabled.

Little Rock, AK, remains the largest U.S. metro region missing from the interline bus network, stemming from Greyhound's problems with stop arrangements. (Fortunately, Tornado Bus still serves the Arkansas city). In Austin, FlixBus has moved to the South Congress Transit Center in the south part of the city. This reflects the growing movement to shift intercity bus activity to a local transit hub.

MOUNTAIN REGION

Last year's biggest story in this part of the country was a major expansion by Colorado's state-operated **Bustang**, which now crisscrosses the Centennial State at high frequency. Bustang, a national leader in publicly supported intercity bus service, more than tripled service on its West Line between Denver Union Station's bus concourse and Vail and Grand Junction last year. This service skyrocketed from four to 15 trips daily, the greatest frequency by one company on any long-distance route that did not involve California or the Northeast. On the North Line, between Denver and Fort Collins, and the South Line, between Denver and Colorado Springs, service doubled from six to 12 weekday trips. Similarly, weekend service on both these routes grew from two to six.

Bustang’s operator, **ACE Express Coaches**, part of **All Aboard America Holdings**, [announced](#) that it had hired 50 employees while the state procured 25 new motorcoaches to facilitate this expansion. In addition to mainline Bustang service, the Bustang Outrider, Pegasus, and Snowstang remain part of the mix, running with vans and other smaller vehicles on some routes.

Bustang recently launched Denver International Airport (DIA) service and added a second Denver – Crested Butte daily trip. It handled 290,700 passengers during the 12 months ending in June 2024 and is projected to hit 325,600 this year, the 10th anniversary of its operations.

This expansion creates lower-cost alternatives to Colorado's massive but pricier van system operated by **Epic Mountain Express** and **CO West Transportation**. These and other scheduled van operators, mainstays at Colorado ski resorts, run primarily to and from DIA. Most have added service with the strong rebound of leisure travel. Colorado now has the distinction of having (based on our review) the country’s largest scheduled long-distance van system and its largest state-supported intercity bus provider. In addition, Landline expanded its United Airlines partnership at DIA by expanding its Fort Collins service (see page 21).

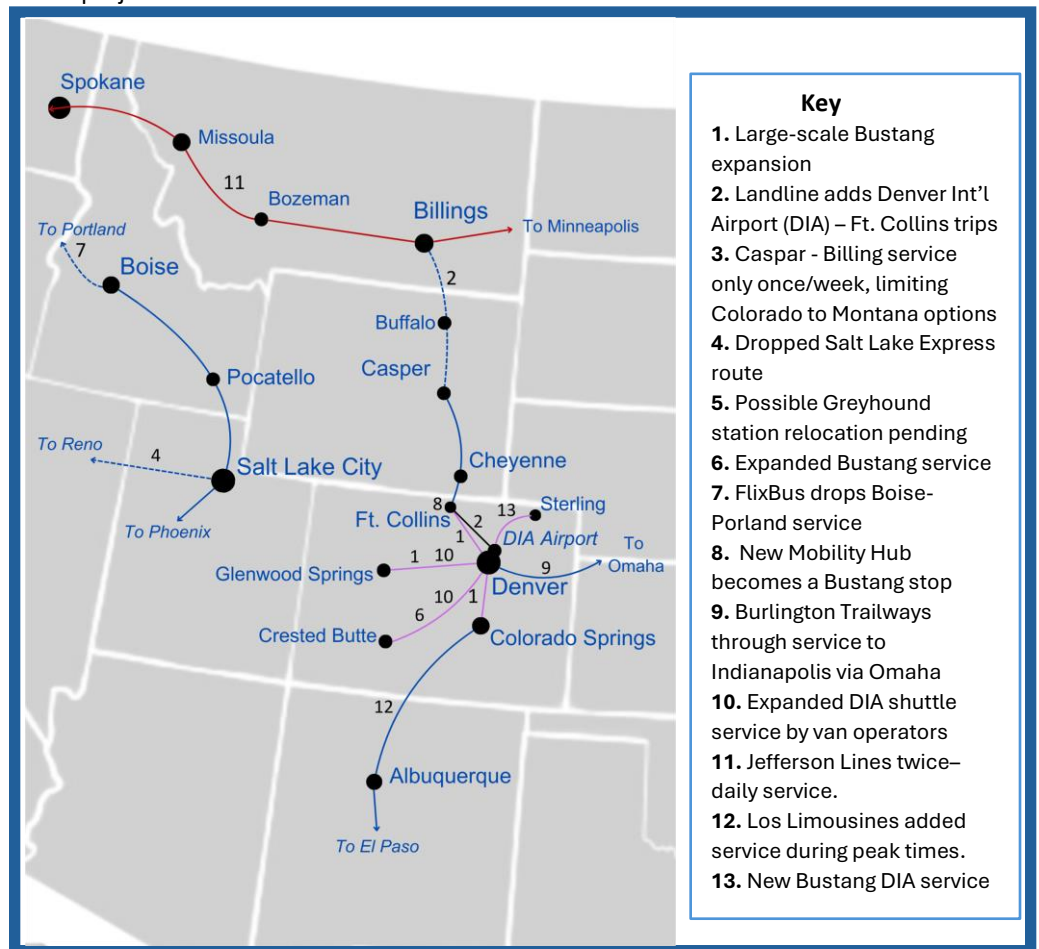
Among the bright spots for long-distance service are the following:

- **Billings and Bozeman, MT, – Spokane, WA**, continues to have two Jefferson Lines trips on most days.
- **Denver – Albuquerque – El Paso** remains robust, holding steady at three to four daily trips, including three on the busiest days by Hispanic-focused **Los Limousine**.
- **Denver – Omaha** is served by both **ArrowExpress** and **Burlington Trailways**. Burlington’s bus continues to

Indianapolis, IN, creating many connections to other routes in the Great Plains and the Midwest.

- **El Paso – Phoenix, AZ**, has numerous options due to the sizeable presence of Hispanic-focused **Los Limousine** and **Tufesa**. On busy days, these lines together have four trips, augmenting **Greyhound’s** five. The ethnic-focused lines offer significantly faster service than Greyhound and Amtrak’s *Sunset Limited*, which serves Phoenix from nearby Maricopa, AZ.

Unfortunately, these routes are outliers. The Mountain



States saw far fewer interstate enhancements than most other parts of the country last year. Seemingly important routes from Denver to Kansas City, MO, Houston, TX, and Salt Lake City, UT, have only a once-daily Greyhound run. This is despite the City of Denver’s program to buy bus tickets to bring migrants to their city. (After the city reportedly purchased many tickets to allow some to continue their journey to join families elsewhere, Utah has resisted their arrival.¹²) Moreover, troublesome gaps have also emerged. Non-circuitous bus trips from Denver to Montana and North Dakota are

no longer possible from Friday to Sunday due to a drop in Caspar, WY – Billings service to once per week.¹³

West of the Rockies. **Salt Lake Express** (SLE) continues to have both Salt Lake City International Airport (SLC) and the city’s downtown on most schedules. This arrangement gives customers several options akin to that in Boston. SLE also stands out for its long-haul service from the airport, which extends to Great Falls, MT, Boise, ID, and Las Vegas, NV. Many longer routes, including those to the above cities, involve well-timed transfers at connecting points. With state financial support, SLE also operates numerous intrastate services, including intrastate routes to Moab and Vernal.

This subregion has also seen troubling gaps emerge. SLE’s direct Salt Lake City – Reno, NV, service ended last year (see discussion on page 20). Moreover, traveling from Utah’s largest city to Phoenix, AZ on a single ticket requires a roundabout J-shaped journey through southern California with several transfers. Furthermore, **FlixBus** dropped its Boise – Portland service, meaning that Utah – Pacific Northwest travelers must travel via Spokane and make several transfers. (See discussion in the next section).

Station News. According to a media report, Greyhound may need to find an alternative to the bus concourse in Denver Union Station for its Mile High City service due to capacity demands and social issues. Bustang has begun using a new “Mobility Hub” on I-25 near Longmont and Loveland. The center-loading hub allows buses to make stops without time-consuming diversions from the expressway and is designed to reduce traffic congestion and pollution. It was installed as part of the I-25 North Express Lanes Project.

CALIFORNIA & NEVADA

California and the Southwest’s service has ebbed and flowed unpredictably in recent years. Several carriers, including Kolors, Megabus, and relatively obscure ethnic-focused lines, have come and gone. Earning a profit on some longer routes has proven difficult or impossible due to air and rail competition and vast distances without large intermediate

stops. Cabin, the overnight sleeper bus between Los Angeles and San Francisco went out of business about five years ago.

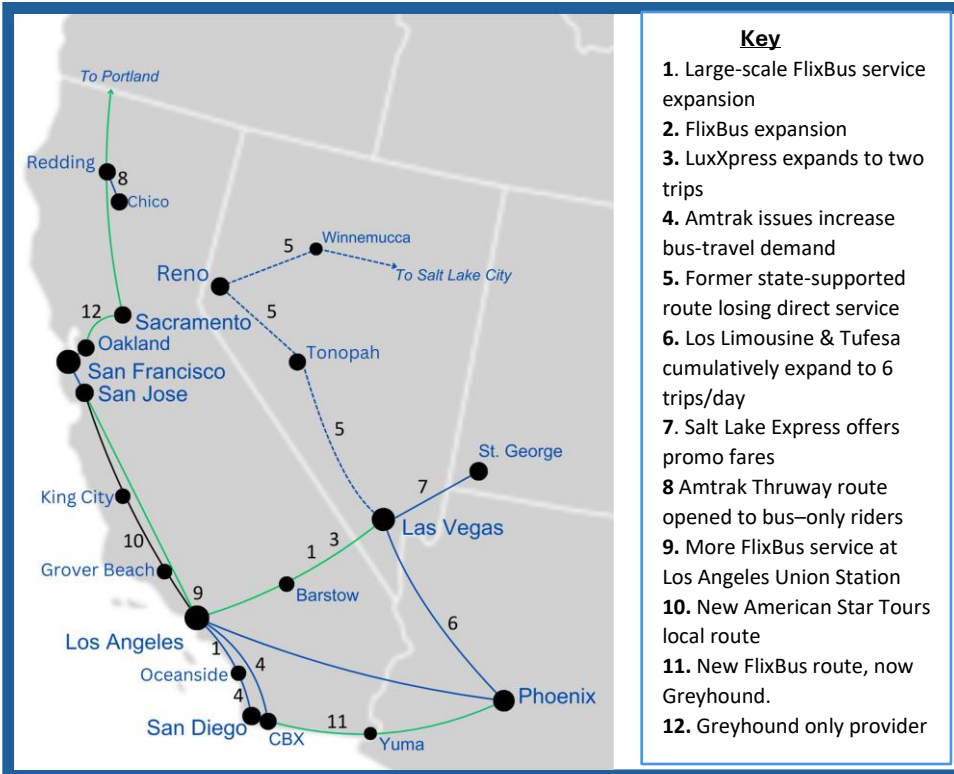
Overall, however, the good news far outweighed the bad last year. FlixBus, Greyhound, and several Hispanic operators have dominant positions, with Flix making particularly bold moves. Although many lines in the Hispanic category are niche players, relying primarily on Facebook sites and informal methods for promotion, Limousine Express and Tufesa stand out for their size and sophistication. Each has bilingual websites, well-functioning apps, and reserved seating, making them attractive to those who might otherwise use conventional lines.

Among the biggest stories was **FlixBus’s** added Las Vegas – Los Angeles (LA) service, which has grown from around five to 10 trips on busy days, based on our review. Several buses are tightly clustered, indicating demand exceeding one bus’s capacity, and have alternating intermediate stops. Some continue past Los Angeles Union Station (LAUS) to Santa Monica and other metro LA locations, creating through-service options. FlixBus’s departures from the heart of the Las Vegas Strip are supplemented by Greyhound’s six trips to the South Strip Transit Center, totaling 17 daily trips to LAUS



A FlixBus from Los Angeles pauses at San Jose’s Diredon Station (seen in the background). The location allows for convenient connection to Caltrain and light rail.

by the two lines. This amounts to more than 850 seats in each direction daily.



Sacramento. After reaching San Francisco, most buses continue to Oakland. This route remains among the most prominent in the U.S. with no bus service options besides FlixBus and Greyhound. However, a new company, **American Star Tours**, created by a former FlixBus executive, launched a daily San Jose – LA service last year that is sold on the two larger lines’ booking sites.¹⁴ The service follows a coastal route with numerous stops, including King City and Grover Beach, CA, which otherwise lack connections to the national network. The company is an Amtrak Thruway provider and set up for interline ticketing with Greyhound.

Niche provider **Las Vegas Shuttle**, which often uses vans, generally runs three to five times daily, with added service to San Diego. Also using vans, LuxXpress added a second daily trip only on peak days. Motorcoach operators **Los Limousines** and **Tufesa** typically operate three to four times. Although Amtrak’s *Desert Wind* has not been part of the mix since 1997, fast rail service on *Brightline West* is planned to be available by 2028, although some believe that 2030 or later may be more realistic. The railroad had a heavily publicized groundbreaking for its Las Vegas terminal last year, about a mile from the South Strip Center. It will operate as far west as Rancho Cucamonga, CA, where connections to LA and other points can be made.

FlixBus’s rollout of Phoenix – San Diego service last year allows customers to avoid transfers in LA. This once-daily route, more than 360 miles long, fills a gap in the U.S. ground network and runs via El Centro, CA, and Yuma, AZ. This service appears to have recently been turned over to Greyhound.

On the massive LA – San Francisco route, FlixBus and Greyhound together have seven buses daily on busy days, roughly the same as last year. Four are FlixBus. Most stop at San Jose’s Diridon station, where transfers

can be made to Caltrain’s newly electrified rail service, ACE commuter rail to Stockton, and Amtrak trains to

Other LA – Bay Area ground options are mainly limited to Amtrak’s *Coast Starlight* and Amtrak Thruway bus-train connections via Bakersfield or Santa Barbara/Santa Luis Obispo, each more than three hours slower than direct buses. Tufesa serves this corridor, too, but like America Star Tours, it terminates in San Jose.

Extensive LA – San Francisco air service is also available, while high-speed rail service is about a decade away if deadlines are met and political opposition doesn’t hamper construction. The future could also bring Dreamstar, a rail startup hoping to launch overnight sleeping car service, emulating the former Southern Pacific *Lark*, but it has no defined starting date.

Intercity bus service is lagging on the Capitol Corridor between the Bay Area and Sacramento, where low-cost rail service is abundant. FlixBus has withdrawn from this route, and Greyhound, the lone provider, has just three daily trips, despite covering the Oakland – Sacramento leg in about the same time as Amtrak trains. Serving downtown San Francisco gives the bus one advantage over the train, but the Bay Area’s frightful traffic is a drawback.

Another surprising development is FlixBus’s significant expansion service on the LA – San Diego corridor. This route has long posed difficulties for bus lines due to the popularity of Amtrak’s *Pacific Surfliner*, which runs frequently and is attractively priced. Years ago, competition from the *Surfliner* compelled **BoltBus** and **Megabus** to drop this route long before suspending other California routes. FlixBus, however, appears to be successfully capitalizing on reliability issues facing Amtrak and parallel regional commuter rail services) due to dangerous mudslides and ocean incursions. The problems have spurred a rash of cancellations and bus substitutions. Based on our review, FlixBus has grown to 11 trips on busy days, significantly more than in early 2024, while Greyhound has another four.¹⁵

Only FlixBus and Greyhound offer downtown LA – San Diego bus service on major booking sites, but Limousine Express still runs an 11-times-daily service from LA to Cross Border Express, a bus station along the U.S./Mexico border within walking distance from an airport on the Mexico side. Shuttle provider reLAXsan runs motorcoaches between San Diego and Los Angeles International at much higher prices.

Changes Not Involving California’s Largest Cities. Bus riders have less to celebrate on routes that do not involve the Golden State’s largest cities. Direct Salt Lake City – Reno, NV, service, provided by **Salt Lake Express** with State of Nevada support, ended last year. Amtrak’s *California Zephyr* covers the route but has an overnight schedule. Another bus line will reportedly pick up the route, but no details are announced. Direct Las Vegas – Reno service, which had a similar operating arrangement, has also ended. This leaves no scheduled ground options between Nevada’s largest cities and ends access to the national bus network for Beatty and Tonopah, NV.

Las Vegas – Phoenix, AZ, is now an outlier for having more service by a Hispanic-focused than conventional line. Tufesa has three trips on busy days, while FlixBus has two. Greyhound’s withdrawal, sometime after the



A Tufesa coach in San Jose is preparing for a Los Angeles departure. The Hispanic-focused line’s storefront station is just out of view, at left.

start of 2023, requires those traveling from Salt Lake to Phoenix on a single ticket to go via metro LA.

Last autumn, Salt Lake Express began offering a \$30 one-way fare promotion on its heavily used St. George, UT, – Las Vegas McCarran International Airport service. Service has now grown to 10 trips each way on many days of the week. SLE has an interline agreement with Greyhound and has been a mainstay on this route since acquiring the St. George Express several years ago.

In more rural areas, **Amtrak Thruway’s** Chico – Reading bus service has been opened to travelers who are not making train connections, following a statewide trend. Eastern **Sierra Transit Authority**, whose routes include Lone Pine, CA, – Reno, participated in RTAP’s Community Rides program to improve access to critical services.

Station News. FlixBus expansion has allowed LAUS to blossom as an intercity bus hub. FlixBus has gradually relocated its LA service to the facility alongside Greyhound, although it still maintains a nearby stop on Cesar E. Chavez Ave. It and Greyhound have around 44 daily bus movements at the terminal, up considerably from a year ago. This provides convenient connections to Amtrak, Metrolink regional trains, and local and regional transit, although most seating for bus passengers is some distance away.

Negative publicity from crime in and around bus stations brought notoriety to the sector in 2024. A court case in Sacramento over a shooting several years earlier generated a barrage of news coverage. The Bakersfield case involves a shooting that dates back to 2020. There is no easy solution to this problem, which mirrors the issues facing urban metro systems nationwide.

THE PACIFIC NORTHWEST

The Pacific Northwest’s biggest intercity bus story is heightened rail-bus synergy on Amtrak’s *Cascades* route facilitated by expanded Amtrak Thruway bus service. This greatly enhanced ground travel options but has brought added competition to conventional bus offerings.

Competition on the Portland, OR – Seattle, WA, route has been particularly intense for conventional bus lines since two more Amtrak trains began running between these cities in late 2023, pushing the daily total to seven. This came on the heels of Amtrak’s 2021 return to the Port Defiance Bypass route near Tacoma, WA, which it had stopped using after a devastating derailment. The Bypass enhances train reliability and slightly reduces travel times.

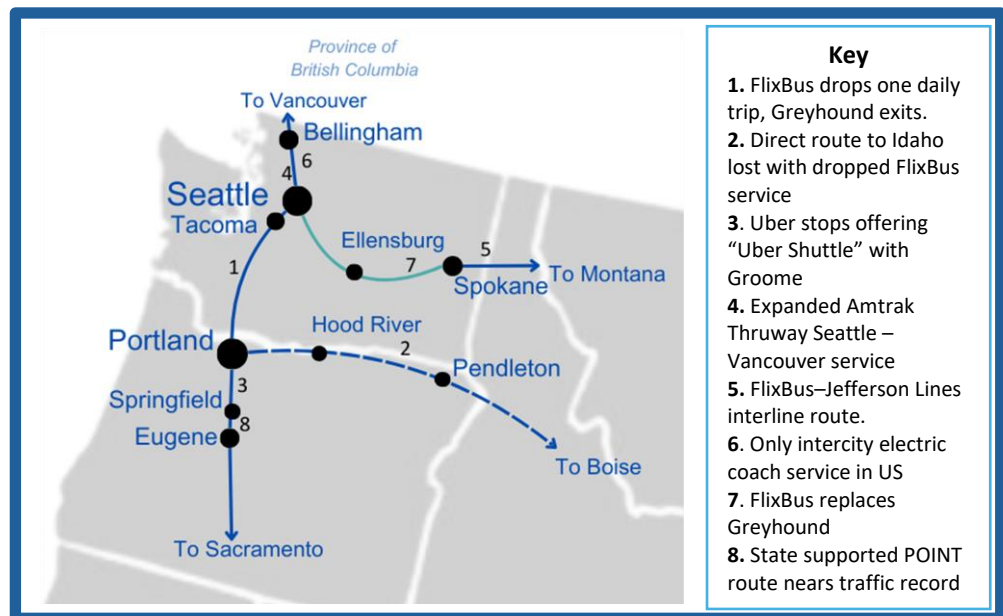
These improvements appear to have thwarted bus service expansion. **Greyhound** ended its daily trip on the route last year, leaving this corridor to sister company **FlixBus**, which generally has 4 trips on busy days. Based on our review, the two companies make one or two fewer trips in total than early last year.

Oregon and Washington State continue to be trendsetters in bus-rail integration. **Amtrak Thruway** bus service for the Seattle – Vancouver, BC, route grew from two to four in late 2023, supplementing the two daily trains. This gives travelers attractively spaced options on amtrak.com. Despite this, Flixbus matches Thruway’s frequency, having four trips on busy days,

while Quick Shuttle, a local operator, provides two daily round trips in winter and four in summer. All make intermediate stops, including Bellingham, WA, whose Amtrak Thruway route remains the only known electric bus service using a full-size motorcoach on the U.S. intercity bus network.¹⁶

Oregon continues to adeptly integrate bus and rail service on the *Cascade* corridor’s southern end. Public funding for the **Oregon POINT** bus service strategically fills gaps in Portland – Eugene, OR, schedules, creating ten daily options. This route accounts for about 70% of POINT ridership and has seen dramatic increases in bus ridership, now approaching record levels. Other routes have seen a mix of ridership increases, decreases, and steady traffic.

On busy days, FlixBus has three Portland—Eugene trips,



while Uber appears to have quietly dropped its “Uber Shuttle” between Eugene and Portland’s international airport. The Groome airport van service used for this has stopped serving Eugene. It is unclear whether a new era of rideshare/airport shuttle cooperation will unfold as we once projected.

Seattle – Spokane service has five daily buses on busy days, divided between FlixBus (which replaced Greyhound on this route last year) and **Northwest Stages** (a unit of Salt Lake Express). Likely due to Greyhound’s withdrawal from major routes in this region, FlixBus’s operator (MTR Western) continues to interline with Jefferson Lines at Spokane. This allows for “through ticketing” from the Pacific Northwest to

northern Idaho, Montana, North Dakota, and other areas not served by FlixBus–Greyhound. Interline agreements between FlixBus and other longstanding Greyhound partners are less extensive in certain parts of the country.

Service levels are often light outside of these busy corridors. FlixBus restored a second daily Portland, OR, – Sacramento, CA, trip during the peak season but reverted to one during slower times. FlixBus dropped its relatively new Portland – Boise, ID, service early this year. This eliminates several notable connections with POINT routes. Travelers from the Pacific Northwest heading to Colorado and Utah must now generally travel via Spokane and make several transfers. Amtrak service ended decades ago, making this a notable ground-transportation gap.

Washington State remains a national leader in state-supported bus travel, particularly for its four branded *Travel Washington* routes. Late last year, the state completed [a plan](#) that makes the case for large-scale service expansion. North of the border, [in Alberta, Canada](#), FlixBus added the Edmonton – Calgary and Calgary – Lethbridge routes, both with two daily trips, with added service on the Edmonton route at certain times. Keolis’ 2024 purchase of Pacific Western Transportation, which includes Red Arrow services and other western Canadian operations, may herald changes in Canadian intercity bus service.

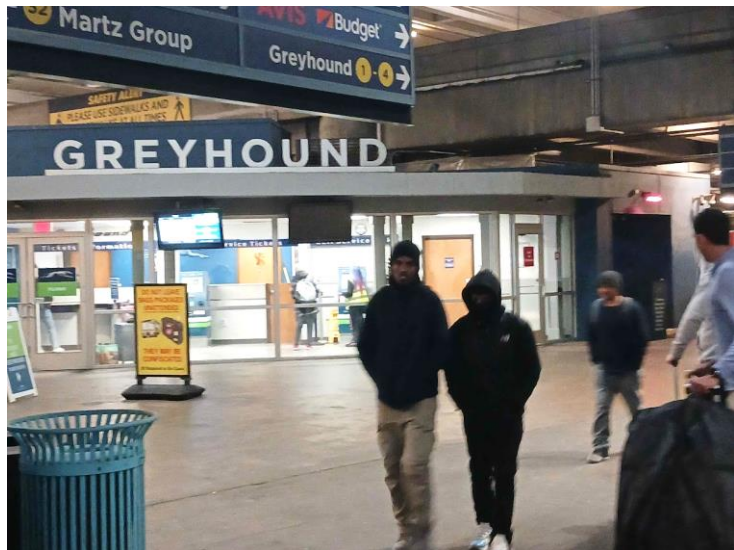
TRENDS & PROGNOSTICATIONS

We offer several predictions for the next 12 months and beyond.

Prediction 1: Intercity bus ridership will grow 4% in 2025, a rate substantially above the projected 2.4–2.8% growth of domestic auto and air travel by the U.S. Travel Association. Service expansions in the Sunbelt and Southwest lay the groundwork for a particularly strong year in these warm-weather areas. Traffic will be flatter in the Midwest, Mountain States, and Pacific Northwest.

Based on our conversations with industry leaders, review of company announcements, and schedule

analysis, we expect passenger traffic to stay on an upward trajectory into 2026. These gains follow the tumultuous period when driver and equipment shortages constrained growth. Reduced Greyhound mileage was a particularly significant drag on ridership.



Several passengers walk in front of Greyhound’s ticketing office at Washington Union Station’s intercity bus facility.

Thankfully, the mood has shifted, and the headwinds have eased. Many customers have become reacquainted with bus travel, and technological issues at some online booking platforms are in the past. Peter Pan’s bold moves on Megabus’s cuts in the Northeast stand out, as does FlixBus’s bullishness in the Northeast and warm-weather regions. RedCoach, the Trailways carriers, Peter Pan, and Hispanic-focused carriers were on the move, while several state-supported networks set ridership records.

FlixBus has grown to have far more traffic than any other U.S. brand, and according to *DW News*, it is now the largest bus company in the world. This report shows that FlixBus has heavily directed its U.S. efforts toward major markets rather than thinly traveled routes or adding services to more metro areas surrounded by areas with low population density. Positioning Greyhound to support the vast national network of connecting services and FlixBus as a point-to-point provider appears to reflect a general strategy to leverage the two brands’ strengths to a maximum extent. However, there is also much synergy between the two lines due to their itineraries involving transfers between them at connecting points across the U.S.

Apparently, due to this strategic direction, FlixBus does not yet serve Denver, CO, Kansas City, MO, or Salt Lake City, UT, which have few other major cities within 300 miles. It prefers, at least for the moment, to leave them to Greyhound. The company plans to expand into Mexico this year while also growing in Canada.¹⁷

The bounce-back across the country has been distressingly uneven. Many rural and secondary routes have had a slower recovery, particularly in the Midwest, Mountain States, and Pacific Northwest. The experience of passengers on trips requiring transfers has diminished on many routes due to the loss of traditional stations.

Taken as a whole, however, we believe the build-up of service by prominent brands on major corridors last year bodes well. Traffic appears to have been well above 2019 levels in the South, the Southwest, and Texas. Although we lack the data to compare national ridership with pre-pandemic levels for the entire country, we expect the recovery to resemble that of Amtrak more closely than urban public transit. We anticipate the growth in bus ridership to reach 4%, well above the U.S. Travel Association's [domestic growth forecast](#) of 2.8% for air travel, 2.4% for highway travel, and 2.6% for all trips combined.¹⁸

Prediction 2: State-supported bus networks, already a dynamic part of the country's intercity bus system, will see more expansion. These networks are less vulnerable to the impending "fiscal cliff" than public transit systems and are laying the groundwork for service additions.

State governmental planning support, funding, and procurement for intrastate bus service are pervasive and positive forces in bus travel. These services attract many passengers who might otherwise avoid scheduled motorcoach travel. Significant federal funds, such as those through the USDOT's 5311f program to serve cities with populations below 50,000, support these efforts. Federal funding allocations in FY 2024 are just under \$141 million, according to KFH Group. KFH is leading work on a study of the state role with regard to intercity bus under a project for the Transit Cooperative Research Program.

Fortunately, the impending "fiscal cliff," which will create great hardship in urban transit networks due to

the end of pandemic-era federal funds, will be less severe for intrastate bus systems. Several systems, including Colorado's Bustang and Virginia Breeze, have appreciably expanded service, which appears here to stay. Many other states, including South Dakota and Washington, are also eyeing expansion.

Prediction 3: New equipment purchases raise the prospect that the industry can bolster its image at a time when customer expectations about travel experiences are growing.

Supply chain problems and uncertainty about the post-pandemic travel market prompted many lines to postpone purchasing new motorcoaches from 2020 to 2023. The average age of buses grew sharply, particularly at Greyhound.



On a chilly January 2025 day, travelers for New York formed a queue at Peter Pan's boarding area in Washington Union Station.

Fortunately, the tide has turned. The American Bus Association's *2024 Motorcoach Builders Survey*, issued in late 2024, indicates that new motorcoach sales for the fourth quarter were up 15.1% over the same quarter in 2023. While sales remain below pre-pandemic levels, they are trending in the right direction.

Several examples of fleet upgrades stand out:

- Greyhound introduced 60 new coaches, which is the most significant move by FlixBus (Greyhound's owner) to modernize the legacy carrier's fleet since it acquired it in 2021.

- Trailways’s shareholders across the country acquired 30 new motorcoaches in 2024.
- Massachusetts-based Peter Pan took delivery of 15 new coaches in autumn as part of a 45-bus order to support expansion and purchased eight in November.
- Minnesota-based Jefferson Lines took delivery of four new coaches last autumn and expects eight more soon.
- New Hampshire-based C&J Bus Lines took delivery of seven new motorcoaches.



Passengers wait at the Milwaukee Intermodal Terminal in front of the Greyhound ticket counter in November 2024.

California’s emissions rules, however, create serious concerns for some bus lines. [ABA warns](#) that the state’s environmental board’s ambitious electric vehicle mandate “threatens to push many small operators out of business.” Overall, however, fleet upgrades are a bright spot for the industry.

Prediction 4: The share of bus trips comprised of journeys under 300 miles will grow due to intense competition from private vehicles, air travel, car rentals, and concerns about the unpredictability of longer bus trips.

Both favorable and unfavorable trends affect the direction of long-distance bus traffic. The expanding national travel market is among the most positive trends. Plus, large numbers of immigrants and other foreign-born residents need and greatly value bus

travel, as made evident by Hispanic-oriented lines’ impressive growth last year.

Further, airlines are grappling with plane shortages, partly due to slow production lines at Airbus and Boeing, which will likely push airfares upwards. Air traffic, airport-related delays, and the rising stress of flying have prompted many to shift from short-hop air trips to highway modes. More funds are flowing to rural bus routes and intrastate bus systems.

However, there are also *unfavorable* trends, such as the growing adeptness of travelers to avoid lengthy and tedious bus trips. Air travel is expanding, particularly for trips over 500 miles. Steeply discounted basic economy fares and affordable one-way fares make it more difficult for bus lines to attract customers on trips where air service is pervasive. While crowded and stressful, airports are usually safe and generally have far more pleasing architectural designs and attractive dining and retail, which are absent from most bus stations. Many bus services have been shifted to stations without much indoor seating.

Similarly, enhanced automobile and light-truck features make longer driving trips more comfortable, even as congestion worsens. Although car ownership rates haven’t changed much since 2019, rising fuel efficiency and improved navigation make long driving more practical. One-way car rental, once a last-resort option, is now mainstream.

Overall, we expect trips *under* 300 miles to see sustained growth through 2026 and longer trips to hold steady or modestly decline. Amtrak faces challenges as traffic on the Northeast Corridor and state-supported routes has grown faster than long-distance trains over the past several years. Some differences were due to Amtrak’s railcar shortages and other unusual factors. The weakness in long-haul traffic creates risks that service cuts will hurt vulnerable segments.

Prediction 5: The prospect of reduced privately provided bus service outside of major corridors, when concern about inequities in transportation access is growing, will push policymakers to be more responsive to the national bus network’s

needs. Arrangements allowing bus lines to use local transit centers are proving favorable, and state government familiarity with the industry's needs is growing.

Interline agreements and workable connections between dozens of lines support the national bus network. It allows tens of millions of residents who cannot drive, cannot afford other forms of travel, or live in places without air and rail service to travel to their desired destinations with a single itinerary. This network has suffered in recent years due to the loss of stations and service reductions among participating bus lines.¹⁹

The loss of traditional downtown Greyhound stations in Houston, TX; Philadelphia, PA; Portland, OR; Richmond VA; several Ohio cities; and elsewhere has commanded policymaker attention. Fortunately, the indifference of municipal governments and transit agencies has

diminished (at least somewhat), thanks in part to the hard work of industry officials and advocates. Greyhound's relocations or planned relocations to transit centers in Cleveland, OH; Dallas, TX; and Richmond, VA, are good examples of the benefits of public-sector collaboration. Not all governments are cooperative, but attitudes are changing.

These developments are occurring as concerns about transportation equity grow. Such concerns fuel federal and state interest in intercity bus travel, making this long-overlooked mode of travel more prominent in important planning efforts. ■

The Chaddick Institute will host a free webinar on this report's findings on Thursday, February 27, 2025, at noon CT. [Click here for details.](#)



Boarding will soon begin for a Plymouth & Brockton coach at Hyannis Transportation Center in summer 2024. A Peter Pan coach from Boston is parked several bays away.

Appendix

LANDLINE'S EXPANDING MOTORCOACH SERVICE REPLACING REGIONAL FLIGHTS

Landline specializes in offering motorcoach service to replace regional flights. It typically uses full-size motorcoaches configured with 2x1 seating, with some bearing its livery and, in other cases, emblazoned with airline insignia. Customers receive airline-style boarding passes on their phones and generally have baggage claim to their destination. Service is usually available to both those making flight connections and local riders.

Such intensive bus-air integration follows much earlier European development (see discussion in endnotes).²⁰

The Minnesota-based company's first partnership was with Sun Country Airlines at **Minneapolis–St. Paul International Airport** (MSP) in 2019. Landline now links MSP to airports in Duluth, Fargo, and Mankato, MN, and last year added Brainerd, MN.

The ground operators' American Airlines partnership at **Philadelphia International Airport** is its largest. Elaborate procedures for this service, which can be used nationwide, emerged after a six-month pilot program launched in 2020. Motorcoach users board and alight behind security. Atlantic City and Allentown, PA, services have grown from two to five and six trips daily, respectively, and the company recently added Wilmington, DE, and Scranton, PA, routes. This gives Landline around 38 daily "flights" (19 motorcoach roundtrips) at Philadelphia. Between June 2022 and July



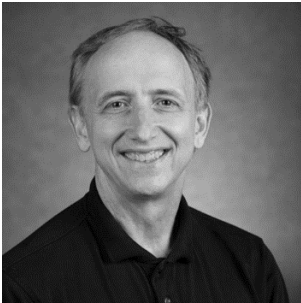
A Landline coach operated for United Airlines at Northern Colorado Regional Airport in Fort Collins, CO will soon depart for Denver International Airport.

2024, it served around 185,000 passengers.²¹

A third partnership with United Airlines at **Denver International Airport** (DIA) encompasses routes to Northern Colorado Regional Airport in Fort Collins and Breckenridge, CO. Last year, Fort Collins' service grew to eight weekday trips and was supplemented with several new stops near that city. Initially available only to those making United flight connections, these services are now open to all. Buses depart "airside" at a DIA gate resembling the ones used for regional flights and arrive groundside at this hub airport (bus passengers pass through security after arriving at DIA).

Landline forged yet another partnership last year with Air Canada to provide services from the **Toronto International Airport** instead of flights, with service to Hamilton and Kitchener, ON.

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The Chaddick Institute team took and provided all of the photos in this report except the C&J photos on page 4.

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Notes

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- ¹ Boston Express is commuter-focused and operates with state-government financial support. Having extensive airport service is a rarity among bus lines in this category.
- ² New York Trailways consists of Adirondack Transit Lines, New York Trailways, and Pine Hill-Kingston Transit, all of which are commonly owned and operated as members of the Trailways group.
- ³ A small bus line, Agee Bus, sold on gotobus.com, also provides New York – Pittsburgh service, originating in New York’s Chinatown. However, it is limited to certain days of the week. In early February 2024, it ran only on Saturdays.
- ⁴ Despite the transfer, such customer-friendly scheduling makes the Philadelphia – Pittsburgh service no more than a half-hour longer than Amtrak’s Pennsylvanian.
- ⁵ For details of the ridership growth, refer to the *Virginia Mercury* article [here](#).
- ⁶ We thank George Kaufer for bringing this network of vans to our attention.
- ⁷ The practice of staggered service classes gives rise to unresolved pan-industry thoughts about the definition and value of classes of service. Several carriers in the New York – Washington, DC corridor have buses configured differently for this purpose, whereas The Jet and Vonlane offer only first-class service.
- ⁸ The new interline service links all North Carolina routes operated by Sunway Charter to Virginia Breeze. For details, click [here](#). Other NC routes, operated by Greyhound, already have interline connections with services outside the state.
- ⁹ The Multimodal Terminal is adjacent to the commuter rail station, which offers infrequent service to Chicago Union Station. However, during the 2024 political convention in Chicago, Metra offered hourly rail shuttles to Chicago Union Station. The terminal is also well connected to the North Shore suburbs by a new Pace Suburban Bus bus-rapid-transit line.
- ¹⁰ Proposals have emerged for both conventional Amtrak and high-speed rail (by Texas Central) on the Dallas – Houston route. Conventional service was once hotly contested between two railroads, with four-hour timings on the fastest trains.
- ¹¹ For details of the Longview initiative, refer to this *Texas Tribune* [here](#).
- ¹² For details of the Denver program, refer to the *Colorado Newsline* article [here](#).
- ¹³ ArrowExpress also operates a Denver – Caspar – Buffalo, WY service that also allows for connections to Montana and North Dakota. However, it runs only Monday through Thursday.
- ¹⁴ For details of American Star Tours, refer to this *Bus & Motorcoach News* article [here](#).
- ¹⁵ Measuring service levels on the Los Angeles – San Diego route for FlixBus is difficult due to complex stop patterns on both ends of the route and their dynamic nature. Our figures are estimates. Regarding Amtrak, current plans are to relocate the railroad inland, but once approved, this will be a multi-year project.
- ¹⁶ The Amtrak Thruway service, supported by the State of Washington, links Seattle to Bellingham. [Click here](#) for details. A smaller electric bus has reportedly been used for Amtrak Thruway’s service from San Jose to Monterey, CA, but this covers a shorter distance.
- ¹⁷ For details of FlixBus’s planned Mexico expansion, please refer to this *Bus and Motorcoach News* article [here](#).
- ¹⁸ For additional details of this U.S. Travel Association forecast, which was released on January 9, 2025, [click here](#).
- ¹⁹ The rollout of multi-leg trips involving connections between FlixBus and Greyhound in 2022–23 was a major step forward for the network. Another available development is that carriers not part of Greyhound’s interline network, including various Trailways units, are also working to make multi-carrier itineraries more practical. Plus, more rural transit lines are connected to the network, some with through ticketing to nearby and distant cities.
- ²⁰ For example, Iberia’s Bus & Fly program has allowed itineraries with flights and buses to be booked for over a decade. Bus & Fly links 20 locations in Spain, including Alicante, Toledo, and San Sebastian, to Madrid International Airport. This allows travelers to incorporate bus service into flight itineraries and disallows bus trips that do not involve flight connections. Similarly, the Netherlands’ KLM Bus connects Amsterdam Schiphol to Nijmegen, Arnhem, and Maastricht. However, neither Bus & Fly nor KLM Bus operates from behind security checkpoints.
- ²¹ The traffic statistics presented are from a City of Philadelphia presentation at a Transportation Research Forum webinar in early 2024, with details on file from the authors.