

**Intercity Rail & Bus  
Travel Work Session:  
Finding Friendly  
Solutions for Intercity  
Bus**

October 18, 2023



# Overview of ABA & NBTA

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## ABA

- 3000 members
- Bus Operators, Tour Operators, Travel Industry, Associates
- Synergy point for travel planners, bus operators and government affairs expertise

## NBTA

- 85 Members
- Intercity Bus Operators, Small Transit Operators, Ticketing Vendors/Consultants
- Clearinghouse for shared ticket revenue - \$130 million/year
- Ultimate synergy point for intercity bus coordination

# An Overview of Private Motorcoach Services

*(by percentage of companies)*

- **Contract Commuter – 7%**

- **Scheduled Service – 19%**

- **Airport Shuttle – 21%**

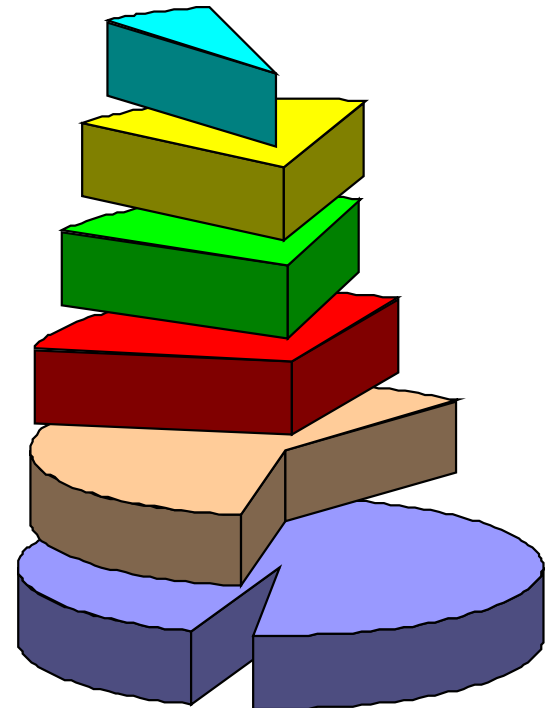
- **Sightseeing – 29%**

- **Tours – 59%**

- **Charters – 96%**

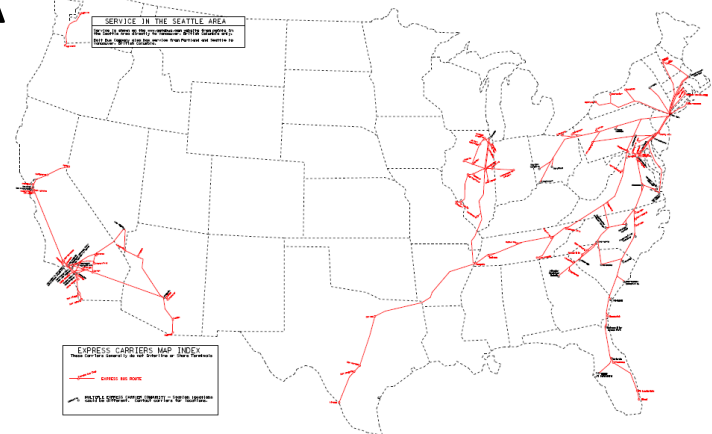
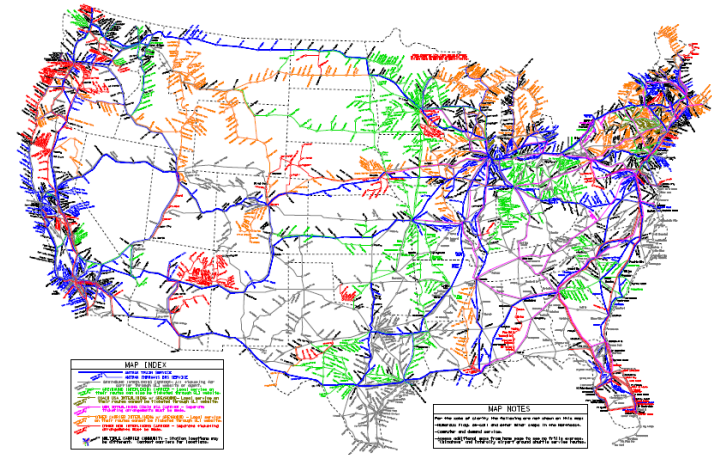
## Other Industry Statistics

- 2,500 companies
- 30,000 coaches
- 530 million passenger trips
- Employs about 115,000 people
- \$ 112.7 billion in total economic activity



# A Closer Look at Scheduled Service

- Intercity Scheduled Service
  - Network
    - Nationwide shared ticketing (interlining)
    - Terminals
    - Curbsides
  - Express (Point-to-Point)
    - Focused in Northeast, Midwest, Southwest, FL/GA/NC/TN/VA
    - Terminals
    - Curbsides
- Commuter Service
  - Suburbs to City Centers
  - AM/PM Peak Service
- Casino Service



# The Motorcoach: The Great Connector

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- **The only mode that connects to all other major transportation modes:**
  - **Intercity Train: Amtrak, Thruway**
  - **Regional Train: VRE/MARC**
  - **Local Train: WMATA**
  - **Transit: Commuter Bus, Park & Rides**
  - **Local Shuttle: Downtown Hubs, Cruise Ships**
  - **Plane: Connections from Newark, DOD Military Bus, Shuttles**
  - **Sightseeing: Hop On & Hop Off, DC Circulator**
  - **Charter Bus**

# Curbside Intercity Services

- **Positives**

- Responsive to consumer travel patterns.
  - Southwest Airlines model
- Low cost with limited overhead.
  - No terminal rental or departure fees
- Affordable fares.
- Guaranteed seating.
- Updated passenger amenities.
  - Wi-fi, satellite radio, videos, restrooms, etc.
- Close stop proximity to intermodal connections.
- Viral marketing streams.
- Advanced capacity management, ticketing systems.

# Curbside Intercity Services

## • Negatives

- Difficult to differentiate carriers, Competitive Space
- Quality of services.
  - Shortcuts: safety, maintenance, speeding.
  - Resulting in horror stories
- Limited exposure to rest of industry.
  - More independent operators, out of the mainstream
  - Don't often belong to associations (ABA, NBTA, etc.)
  - Of 26 companies shutdown on May 31, no ABA members.
- Limited coordination and integration into local/regional transportation planning.



# Industry Opportunities

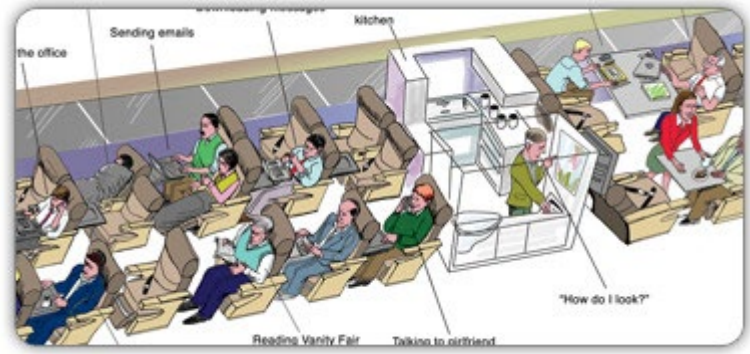
- Potential driver of economic development
  - Intercity bus passengers spend 4-5 days in a location. 75% buy round-trip tickets.
  - Intercity travelers spend \$92/day
  - Union Station (DC) receives \$33 million/year in retail spending from intercity/tour bus passengers.
- Shift in public perception.
- Environmental solution. Sustainable transportation opportunity.
- Traffic/congestion mitigation.



# Profile of a Curbside Passenger

- Curbside intercity bus riders tend to be younger, 73% under 35 years old.
  - 18 to 25 year olds make up about 48% of the passengers
  - 26 to 35 year olds make up about 25% of the passengers
- Tech Savvy
  - Online ticketing only options
- Traveling for leisure.
- Most curbside operations originate in college towns and connect to urban centers.

# More Growth Coming from Industry Leaders



# **Feedback – We Need It!**

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**How Can You Be More Intercity Bus Friendly?**

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