



Winter E-News Brief

Transportation professionals,

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



#1. Amazon Air flew high on Cyber Monday

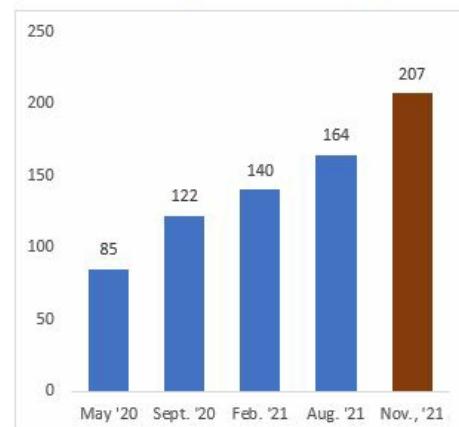
Amazon Air, the cargo airline of Amazon, enjoyed robust expansion while fulfilling a massive number of online orders on Cyber Monday^[1]. Our analysis shows that:

- Amazon Air operated 209 flights on Cyber Monday and 207 on Tuesday, November 30, a 26% increase since similar days of the week [in late August 2021](#), based on our enumeration.
- Amazon Air operated 140% more flights than it did when we first evaluated its network in May 2020.
- The airline's fleet grew from an estimated 73 to 81 planes since late August, an 11% increase. Although the fleet still consists primarily of Boeing freighters, it now flies three ATR-72s.
- The [Cincinnati-Northern Kentucky Int'l Airport](#) (CVG) superhub grew to 30 flights per day, not including extensive activity under the livery of ABX and ATI airlines, in which Amazon has an equity stake. For our analysis, click [here](#).
- Flights on intra-European routes increased markedly, from 8 to 18.5 daily



An Amazon Boeing 767-300ER departs from Ontario International Airport on July 10, 2021 (Peiwen Chen)

Amazon Air: Average Number of Daily Flights



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

#2. Intercity Buses Rolling to Recovery

Scheduled long-distance bus lines, such as **FlixBus**, **Greyhound**, **Jefferson Lines**, **Megabus**, and **Peter Pan**, enjoyed rebounding traffic during the Thanksgiving holiday, even as driver shortages persist. Although we do not yet have detailed estimates of bookings, passenger levels appear to have exceeded 70% of pre-pandemic levels on numerous routes, with many routes, such as Chicago – Indianapolis, having “sold out” before the holiday. FlixBus’ heavily publicized [purchase of](#) Greyhound Lines in October is generating excitement. Outside of California and the Northeast, [the recovery](#) appears to be strongest.



Several bus lines also made headlines:

- [“The Jet,”](#) a new luxury bus line with just 14 seats per bus, launched New York – Washington service.
- [Virginia Breeze](#), operated with support from the Virginia Department of Rail and Public Transportation, launched a Bristol, VA to Washington, DC route.
- [RedCoach](#), known for intra-Florida business-class service, has launched routes in Texas.
- [FlixBus](#) has announced it will roll out electric buses on a Pacific Northwest route in 2022, the first use of this technology on a US intercity bus corridor.



Check out our recent fare analysis and intercity bus e-newsletters [here](#), and watch your inbox for our 2022 [Outlook for the Intercity Bus Industry](#) report in mid-January.

#3 Startup Airlines Gaining Altitude



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

service available on many thinly traveled routes. [Our analysis](#) indicates that more than 95% of these routes link airports that previously lacked nonstop service.

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



Plus, rail-passenger operators are looking to expand. [Amtrak](#) is well-positioned with the recent passage of the federal infrastructure bill, and the privately operated [Brightline](#) resumed intra-Florida operations and is slated to launch Miami – Orlando trips in 2023.

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

Safe travels everyone. We welcome you to [our holiday reception](#) at Chicago's Exchequer Pub next Wednesday at 5:15 pm.

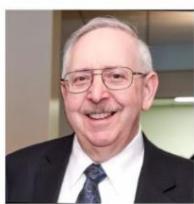
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Join us in St. Louis in April at the [2022 Transportation Research Forum conference](#)

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



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



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