



Indiana Intercity Bus Needs Assessment and Service Evaluation 2021



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Chapter 1 The 2021 INDOT Intercity Bus Needs Assessment and Service Evaluation Update

Executive Summary

This intercity bus study has been prepared as an update to the 2017 INDOT Intercity Bus Needs Assessment and Service Evaluation (“2017 Study”). The 2017 Study found that the availability of intercity bus service in the State had greatly increased over the nine years since a previous study, and this 2021 update confirms that Indiana is better served by intercity bus than it was in 2017. The increase of six additional routes, along with four additional stops for a total of 51, is attributable to INDOT’s use of Federal Section 5311(f) funds to support intercity bus routes that connect to the State’s intercity bus network, along with the proliferation of the low-cost “curbside” carriers. The Indianapolis Bus Station is the largest and most utilized transfer location in the state, served by seven intercity bus carriers and twelve route options.

INDOT dedicates all of its apportionment of Section 5311(f) funds for the operation of 10 intercity bus routes, an increase of two routes since the 2017 Study, with one additional subsidized route operated by both Barons Bus and Miller Transportation. While the volume of service has increased over the past four years, ridership has sharply declined due to the impact of the COVID-19 pandemic.

The study determined through a transit propensity analysis that the state is well served geographically, with 84 percent of the population living within 25 miles of an intercity bus station/stop, while 46 percent reside within 10 miles. The areas of the state with the greatest population residing farther than 25 miles from an intercity bus station/stop are located:

- ◆ North/northwest of Lafayette near Rensselaer along I-65
- ◆ East of US 41 between Vincennes and Evansville
- ◆ West of Indianapolis and north of Terre Haute between I-70 and I-74

The study concluded that the demographic segments of the state that have the greatest likelihood of using intercity bus services—minority population, zero vehicle households, and population below poverty—are well served by intercity bus. A similar conclusion was made for Indiana’s major intercity bus trip generators that includes colleges and universities, correctional institutions, medical facilities, commercial airports, and military bases, with only 18 percent of 305 major trip generators located greater than 25 miles from an intercity bus station/stop.

The study further concluded that coming into the pandemic the state’s Section 5311(f)-supported routes were generally performing well. However, the pandemic has devastated the intercity bus industry, with ridership on these and nonsubsidized routes falling as much as 80 percent. A most important recommendation of the study is for INDOT to continue use of the Section 5311(f) apportionment to maintain intercity bus service coverage and for the carriers to use marketing as a valuable tool in restoring intercity bus ridership to its pre-COVID levels. INDOT has indicated its intention to emphasize marketing in its use of Section 5311/5311(f) funds.

FTA requires a consultation process with the state’s intercity bus carriers before a state can certify that there are no or limited unmet rural intercity needs. Although INDOT uses the entirety of its 15

percent for intercity bus operations, which negates the requirement for the consultation process. INDOT has thus exceeded the guideline by including consultation as a task in this study.

Chapter 2 Introduction

Purpose of Study

The Indiana Department of Transportation (INDOT), Office of Transit, has undertaken this study as an update of the 2017 INDOT Intercity Bus Needs Assessment and Service Evaluation. While the 2021 study will again assess the need for intercity bus service in Indiana and gaps in service, and evaluate the effectiveness of the State's Section 5311(f)-supported intercity bus service, the study will also focus on marketing strategies to aid the intercity bus carriers in their efforts to restore ridership that has been severely impacted by the COVID-19 pandemic. The information obtained through this study will be used to determine how INDOT can best disburse its annual FTA Section 5311(f) apportionment.

As the designated agency responsible for the administration of the Section 5311 program (49 U.S.C. 5311 Nonurbanized Area Formula Program), INDOT is required to spend 15 percent of its annual Section 5311 apportionment to carry out a program to develop and support intercity bus transportation, unless the Governor certifies that the intercity bus service needs of the state are being adequately met. This determination must include consultation with the state's intercity bus providers. This study will incorporate this consultative process, along with a broad-based public outreach effort, to recommend how best to use Section 5311(f) funds. The assessment of intercity bus needs may be made relative to other rural transportation needs in the state.

Study Methodology

To accomplish the objectives of the study, the consultant team used a detailed methodology that included the following tasks:

- ◆ Inventory Indiana's intercity bus routes and stop locations, including service frequency;
- ◆ Analyze route coverage and service gaps;
- ◆ Determine changes in the level of intercity bus service since the 2017 Study;
- ◆ Evaluate the COVID-19 impact on the state's intercity bus service;
- ◆ Obtain feedback through surveys and interviews of the state's intercity bus carriers, urban and rural public transportation providers, and urban and regional planning organizations;
- ◆ Assess the performance of INDOT's Section 5311(f)-supported routes;
- ◆ Conduct consultative process with intercity bus operators and other public transportation providers;
- ◆ Recommend investments to meet the state's intercity bus needs, with an emphasis on marketing strategies; and
- ◆ Provide conclusions and recommendations to improve the provision of intercity bus service in the state and for the future utilization of the INDOT Section 5311(f) apportionment.

Intercity Bus Service

FTA has defined intercity bus service as:

Regularly scheduled bus service for the general public which operates with limited stops over fixed routes connecting two or more urban areas not in close proximity, which has the capacity for transporting baggage carried by passengers, and which makes meaningful connections with scheduled intercity bus service to more distant points, if such service is available. Package express service may also be included, if incidental to passenger transportation. Intercity service is not limited by the size of the vehicle used or by the identity of the carrier.

Note in this case, “urban areas” means a place with greater than 2,500 population; it is not an urbanized area. “Meaningful” connection means that a timed connection exists between the public transit service and scheduled intercity bus service.

FTA provides the following characteristics of intercity bus service:

- ◆ Regularly scheduled bus service;
- ◆ Available to the general public;
- ◆ Makes limited stops;
- ◆ Operates on fixed routes;
- ◆ Connects two or more urban areas not in close proximity;
- ◆ Makes meaningful connections (if available);
- ◆ Predominantly passenger service (any package/goods service incidental);
- ◆ Not a commuter service; and
- ◆ Not air, water or rail service (bus only).

Additionally, the U.S. General Accounting Office (GAO) has defined intercity bus service as regular route service that meets the following criteria:

- ◆ Operates between two or more cities, towns, or isolated clusters;
- ◆ Operates on a fixed schedule;
- ◆ Carries the general public and is not subject to preconditions for passage; and
- ◆ Does not operate wholly within urbanized areas.

While intercity bus service is used by a cross-section of the population, Report 79 of the Transit Cooperative Research Program (TCRP), ***Effective Approaches to Meeting Rural Intercity Bus Transportation Needs***, described the following population characteristics of individuals more likely to use intercity bus services:

- ◆ *Youth (18-24 years old)*. Often these are enlisted military personnel or college students with limited budgets, no access to an automobile, and living or stationed far from home;
- ◆ *Elderly (60 and above)*. Frequently, older adults have a diminished ability or desire to drive and may be more likely to need to visit distant medical facilities on a regular basis;
- ◆ *Persons living below the poverty level*. Persons who are less likely to own a car, or if they do, the car may not be suitable for long trips;
- ◆ *Persons over 16 with a disability*. A group that may be reliant on accessible local transit services and, therefore, may also consider public transit options to make a long trip; and

- ◆ *Auto-less households.* Persons who must rely on alternative means of transportation.

FTA Intercity Bus Program History

A November 2019 National Rural Transit Assistance Program (RTAP) Intercity Transportation Technical Brief addressed the history of FTA's Intercity Bus Program and its impact on intercity bus transportation in this country. The technical brief noted that the passage of the Bus Regulatory Reform Act of 1982 initiated the decline of the intercity bus industry. Upon passage, intercity bus carriers were then allowed to start or abandon routes without any repercussions. This resulted in the country's intercity bus carriers eliminating much of the rural bus service that had previously been cross-subsidized by profits from charters and interstate bus routes between larger cities. The late 1980s saw the intercity bus industry beginning to work with Section 5311 supported rural operators under the Greyhound Rural Connection Program to replace some of the lost service through connections with local rural public transit providers.

Federal financial assistance for rural intercity bus service began in 1991 when FTA's Section 18(i) intercity bus set-aside was created as part of the Intermodal Surface Transportation Efficiency Act (ISTEA). In 1994 the Section 18(i) program was codified as Section 5311(f). National RTAP has noted that the use of the Section 5311(f) rural intercity bus program greatly increased after the FTA issued guidance in 2006 allowing the value of connecting unsubsidized intercity bus service to be used as in-kind match for operating assistance projects. Advocates for the program contended that long distance corridor investments made by private carriers, such as Greyhound, should offset the match requirement. It should be noted that while Greyhound was instrumental in the creation of the in-kind match program and has by far been the most prolific provider of the matching mileage, all intercity bus carriers are eligible participants.

This pilot project was made statutory as part of the 2012 reauthorization bill "Moving Ahead for Progress in the 21st Century" (MAP-21). As of 2019, 29 states were using this method to fund rural intercity bus projects, and another four were in the implementation planning process. Over 600 communities are receiving intercity bus service under the Section 5311(f) program, a direct benefit from the in-kind match provision.

It is important to note that a traditional Section 5311(f) grant typically covers one-half of the operating deficit of the provider. However, when utilizing the in-kind match provision, the Section 5311(f) participation is 100 percent of the operating deficit, therefore, double what it would be for a traditional operating grant. Below is an illustration of a Section 5311(f) intercity bus project budget utilizing the in-kind match provision.

Total Operating Expense of Subsidized Route	\$500,000
Less Fare Box Revenue	\$150,000
Net Operating Cost (before in-kind match)	\$350,000
Cost of Unsubsidized Connecting Service* (in kind match)	\$350,000
Total Net Project Cost (including in-kind match)	\$700,000
Requested Grant Amount (50% of Net Project Cost including in-kind match)	\$350,000

*Available in-kind match from the unsubsidized miles may be calculated at a higher amount than will be used as in-kind match.

An intercity bus stop analysis published in 2017 by the Small Urban and Rural Livability Center found that nationally, the majority of intercity bus stops are located in rural areas, with 28 of the 48 contiguous U.S. states having 80 percent of their intercity bus stops located in rural areas.

Section 5311(f) Intercity Bus Program

The FTA Section 5311(f) Intercity Bus Program, a subsection of the Section 5311 Nonurbanized Area Rural Program, is the primary federal program for supporting intercity bus services. This program was created to address rural route abandonment by intercity carriers and the special transportation needs of isolated rural areas. Section 5311 funds are apportioned to the states based on the nonurbanized population in each state. Section 5311(f) requires that 15 percent of a state's annual Section 5311 apportionment be used to support intercity bus service unless the governor certifies, following consultation with affected intercity bus providers, that all rural intercity bus needs have been adequately met. The statutory provision for the Governor's certification implies that a statewide assessment of current intercity bus service and existing needs has been conducted. The legislative history indicates that the assessment of intercity bus needs may be made "relative to other rural needs in the state." Further, a state utilizing the Governor's certification must demonstrate that the assessment of intercity bus needs was performed no more than four years prior to the date of the certification. This Intercity Bus Needs Assessment and Service Evaluation Study will meet this requirement.

States are allowed to submit a partial certification if less than 15 percent is needed to provide intercity bus service. All unexpended Section 5311(f) funds revert to the Section 5311 program to support other rural transit projects. A project amount of approximately \$2.78 million is available to Indiana for the Section 5311(f) Intercity Bus Program in FFY 2021. For 2021, INDOT utilized CARES Act stimulus funds to supplement the available Section 5311(f) funds.

Status of National Intercity Bus Industry

Nationally, the intercity bus industry finds itself in a very precarious situation. In 2020, the decline of the intercity bus industry as a result of COVID-19 was dramatic and the post-pandemic recovery remains uncertain due to the weakened financial condition of most intercity bus carriers. The DePaul University Report, ***On the Brink: 2021 Outlook for the Intercity Bus Industry in the United States***, describes an industry that is hoping for the best but preparing for the worse. ***On the Brink*** states that intercity bus travel ended 2020 at around 16 percent of the previous year in the Northeast and at a 24–35 percent of the previous year in other parts of the country. The Coronavirus Economic Relief for Transportation Services Act, enacted in late December 2020, provided some temporary relief for the ailing intercity bus industry, but the amount of financial support set aside for the intercity bus industry is rather meager.

Further, ***On the Brink*** notes that as a result of schedule cuts before and during the pandemic, the duration of trips on the national intercity bus network has lengthened by more than an hour between 2016 and 2021. However, intercity buses remain the least expensive travel option on the vast majority of the country's major routes. The budget stretching benefits of bus travel are greatest for those buying tickets only a few days before departure, particularly during holiday periods.

The Chaddick Institute for Metropolitan Development at DePaul University issued an ***Intercity Bus E-News Update*** in May 2021 indicating that intercity bus fares continued to fall for tickets purchased 10 days in advance, even as more carriers rolled out expanded schedules. The report notes that it anticipated that an increase in demand due to summer travel, rising gasoline prices, and supply constraints would give a boost to scheduled intercity bus travel during the summer of 2021. Intercity bus bookings were expected to accelerate in July and rise further prior to Labor Day, when universities reopen for the fall, more people return to downtown offices and jobs, and higher numbers of young people are vaccinated. Recent history tells us that this prognosis was much too optimistic.

Another update was issued by the Chaddick Institute in mid-June 2021 noting that reports were indicating that intercity bus demand was finally firming up. However, signals show that the industry is in for a long recovery. Reports suggest that passenger boardings on some carriers are around 45–50 percent of pre-pandemic levels, but they remain even less in some regions of the country.

On October 26, 2021, speaking at the 2021 National Conference on Rural Public and Intercity Bus Transportation, Dr. Joseph Schwieterman of DePaul University noted that to date, intercity bus travel had recovered to 60–65 percent of the pre-pandemic level. This recovery can be attributed to increased business travel, higher fuel prices, and increases in Amtrak and airline fares.

The status of Indiana's intercity bus service reflects that of the nation. Collected data, surveys, and follow-up conversations with the state's carriers confirmed the difficult situation experienced by the industry in the state. For example, ridership on Barons' Section 5311(f) supported routes decreased by approximately 58 percent from 2019 to 2020. For the same period, Miller's subsidized Indiana routes saw about a 72 percent drop in ridership.

Chapter 3 Inventory of Existing Intercity Bus Service

The 2017 Study found that the following intercity bus carriers operated some level of service in Indiana:

- ◆ Barons Bus Lines;
- ◆ Burlington Trailways;
- ◆ Greyhound Lines;
- ◆ Indian Trails;
- ◆ Megabus (Coach USA)*
- ◆ Miller Transportation

In 2017 Greyhound, once the dominant carrier in Indiana, operated four routes in the state, followed by Barons with three Section 5311(f)-supported routes and one each for Burlington, Indian Trails, and Megabus, none of which were funded with Section 5311(f) funds. By 2017, Miller had become the state's largest provider of intercity bus service, with eight routes across the state, five of which were Section 5311(f) supported.

In 2021 the following carriers operate intercity bus routes with stops in Indiana:

- ◆ Barons Bus Lines;
- ◆ Burlington Trailways;
- ◆ D&J Bus*
- ◆ FlixBus*
- ◆ Greyhound Lines;
- ◆ Indian Trails;
- ◆ Megabus (Coach USA)
- ◆ Miller Transportation
- ◆ Wanda Coach*

Research determined that there are two categories of intercity bus carriers operating in Indiana:

- ◆ Traditional intercity bus—Barons Bus Lines, Burlington Trailways, Greyhound Lines, Indian Trails, and Miller Transportation (Hoosier Ride)
- ◆ Long distance “curbside” intercity bus—D&J Bus, FlixBus, Megabus, and Wanda Coach

There have been some changes in the number of intercity bus carriers serving the state since 2017. In addition to the six carriers operating in 2017, research found that D&J Bus, FlixBus, and Wanda Coach are also providing limited fixed route intercity bus service in Indiana. These carriers provide non-traditional “curbside” low-cost express intercity bus service, such as the service provided by Megabus. Additional information regarding service provided by these carriers and others operating in the state can be found later in this chapter.

* Low-cost “curbside” carrier

Today, these nine intercity bus carriers operate a total of 24 routes in Indiana. This represents an increase of six routes from the number operated in 2017.

The research also found that there are surrounding state intercity bus programs that cross into Indiana. For example, the Rides Mass Transit District out of Harrisburg, Illinois provides Section 5311(f)-supported intercity feeder service to the cities of Evansville, Terre Haute, and Vincennes in Indiana for connection to intercity bus routes.

Below is a description by carrier of the current level of intercity bus service in the state and how the service has changed over the four years since the previous study. Table 1, Indiana Intercity Bus Stops by Carrier, indicates communities across the state with intercity bus service, the carriers serving these communities, and the level of service provided. There are 51 communities in Indiana that have an intercity bus station or stop, an increase from 47 served communities in 2017.

The net four additional stops result from adding the Evansville Airport as a Miller stop, along with new stops in the communities of Angola, LaGrange, Middlebury, Shipshewana, and Spiceland. Miller has discontinued service to Princeton and Washington on its Indianapolis to Nashville route. The Indianapolis Bus Station is the primary transfer location in the state for intercity bus routes, with the station served by seven carriers and twelve routes.

It is important to note that while every effort has been made to ensure the accuracy of this information, due to COVID-19, intercity bus service is subject to change. Stops by the curbside carriers may change at any time without notice.

Table 1: Indiana Intercity Bus Stops by Carrier, 2021

Carrier	Route	Daily routes	5311(f) Status	Indiana Stops
Barons Bus Lines	Liberty – Fort Wayne	1	Subsidized	Liberty, Richmond, Greenfield, Indianapolis, Marion, Fort Wayne
Barons Bus Lines	Fort Wayne – Gary	1	Subsidized	Fort Wayne, Ligonier, Goshen, Wakarusa, South Bend, Rolling Prairie, Gary
Barons Bus Lines	Richmond, IN – Gary	1	Subsidized	Richmond, Portland, Berne, Decatur, Fort Wayne, New Paris, Nappanee, La Porte, Michigan City, Burns Harbor, Gary
Barons Bus Lines	Angola – Gary	1	Subsidized	Angola, LaGrange, Shipshewana, Middlebury, South Bend, Burns Harbor, Gary
Burlington Trailways	Indianapolis – Davenport	2	Unsubsidized	Indianapolis
D&J Bus	Chicago – New York	2	Unsubsidized	Gary, South Bend
FlixBus	Chicago – Columbus, OH	1	Unsubsidized	Indianapolis, Lafayette
Greyhound Lines	Chicago – Detroit	3	Unsubsidized	Gary, South Bend
Greyhound Lines	St. Louis – Columbus	4/3	Unsubsidized	Terre Haute, Indianapolis
Greyhound Lines	Chicago – Cincinnati	5/2	Unsubsidized	Gary, Lafayette, Indianapolis

Carrier	Route	Daily routes	5311(f) Status	Indiana Stops
Greyhound Lines	St. Louis – Nashville	2	Unsubsidized	Evansville
Indian Trails	Chicago – Benton Harbor	2	Unsubsidized	Gary
Megabus	Chicago – Indianapolis	1	Unsubsidized	Indianapolis
Miller Transportation	Louisville – Evansville	1	Subsidized	Corydon, Dale, Evansville/Airport
Miller Transportation	Indianapolis – Elkhart	1	Subsidized	Indianapolis, Kokomo, Peru, Rochester, Plymouth, South Bend, Elkhart
Miller Transportation	Indianapolis – Evansville	1	Subsidized	Indianapolis, Martinsville, Bloomington, Spencer, Terre Haute, Vincennes, Evansville
Miller Transportation	Indianapolis – Auburn	1	Subsidized	Indianapolis/Airport, Pendleton, Anderson, Ball State University, Muncie, Huntington, Fort Wayne, Auburn
Miller Transportation	Louisville – Indianapolis	1	Subsidized	Paoli, Orleans, Bedford, Bloomington, Martinsville, Indianapolis
Miller Transportation	Fort Wayne – Gary	1	Subsidized	Fort Wayne, Warsaw, Merrillville, Gary
Miller Transportation	Indianapolis – Bloomington	1	Unsubsidized	Indianapolis/Airport, Bloomington
Miller Transportation	Indianapolis – Chicago	1	Unsubsidized	Indianapolis, Lafayette, Merrillville, Gary, Hammond
Miller Transportation	Chicago – Columbus, OH	1	Unsubsidized	Gary, South Bend, Elkhart, Fort Wayne, Richmond
Wanda Coach	Indianapolis/Spiceland – New York	1	Unsubsidized	Indianapolis, Spiceland
Wanda Coach	Greenfield/Richmond – Philadelphia	1	Unsubsidized	Greenfield, Richmond

Below is a description by carrier of the current level of intercity bus service in the state and how the service has changed over the four years since the previous study. The carrier information is divided into two sections; one for the traditional intercity bus carriers, and a second for the long distance “curbside” intercity bus carriers. Table 2 depicts the Indiana communities that serve as intercity bus stops and the carriers serving the communities, including Amtrak.

Table 2: Indiana Communities with Intercity Bus Stop

Community	Intercity Bus Carrier (Including Amtrak)						
Anderson	MT						
Angola	BB						
Bedford	MT						
Berne	BB						
Bloomington	MT						
Burns Harbor	BB						
Connersville	AT						
Corydon	MT						
Crawfordsville	AT						
Dale	MT						
Decatur	BB						
Dyer	AT						
Elkhart	MT	AT					
Evansville	GL	MT					
Evansville Airport	GL	MT					
Fort Wayne	BB	MT					
Gary	BB	GL	IT	MT	DJ		
Goshen	BB						
Greenfield	BB	WC					
Hammond-Whiting	MT	AT					
Indianapolis	BB	BT	GL	MT	WC	FB	AT
Indianapolis Airport	BB	BT	GL	MT			
Kokomo	MT						
Lafayette	GL	MT	FB	AT			
LaGrange	BB						
LaPorte	BB						
Liberty	BB						
Ligonier	BB						
Marion	BB						
Martinsville	MT						
Merrillville	MT						
Michigan City	BB	AT					
Middlebury	BB						
Muncie	MT						
Muncie-Ball State University	MT						
Nappanee	BB						
New Paris	BB						
Orleans	MT						
Paoli	MT						
Pendleton	MT						
Peru	MT						
Plymouth	MT						
Portland	BB						
Princeton	MT						
Rensselaer	AT						
Richmond	BB	MT	WC				
Rochester	MT						
Rolling Prairie	BB						

Community	Intercity Bus Carrier (Including Amtrak)						
Shipshewana	BB						
South Bend	BB	GL	MT	DJ	AT		
Spencer	MT						
Spiceland	WC						
Terre Haute	GL	MT					
Vincennes	MT						
Wakarusa	BB						
Warsaw	MT						
Washington	MT						
Waterloo	AT						

Carrier Code:

Barons – BB
 Burlington – BT
 FB – FlixBus
 Greyhound – GL
 Indian Trails – IT
 Miller – MT
 D&J Bus – DJ
 Megabus – MB
 Wanda Bus – WA
 Amtrak – AT



Stops added since 2017



Stops terminated since 2017

Traditional Intercity Bus Carriers

Barons Bus Lines

Barons Bus Lines, with its headquarters in Cleveland, OH, provides two major types of intercity bus services: public intercity bus transportation, and bus charters/rentals, with their core business function being its rural intercity bus operations. The carrier's intercity bus operations travel around 8,000 miles daily, totaling over 2.9 million intercity bus miles annually. Barons serves nine states and over 97 communities. The carrier operates a fleet of 51 luxury Motor Coach Industries (MCI) buses. All buses are model year 2017 or newer, and offer electronic driver logs, seatbelts, wifi, power outlets, and restrooms on all buses.

Barons provides daily intercity bus transportation to 24 locations in Indiana. It accounts for over 45 percent of the total intercity network in the state and over 50 percent of Indiana's intercity stop locations. The company is currently operating four Section 5311(f)-supported intercity bus routes within Indiana, accounting for over an estimated 50,000 passengers annually pre-COVID. Only three

Indiana routes were operated by the carrier at the time of the previous study. The Angola – Gary route, also a Section 5311(f) funded route with stops in LaGrange, Shipshewana, Middlebury, South Bend, and Burns Harbor, was initiated in August 2019. Barons does not operate any routes in Indiana that are not supported with FTA Section 5311(f) funds. The four Indiana routes operated by Barons and their respective published schedules are:

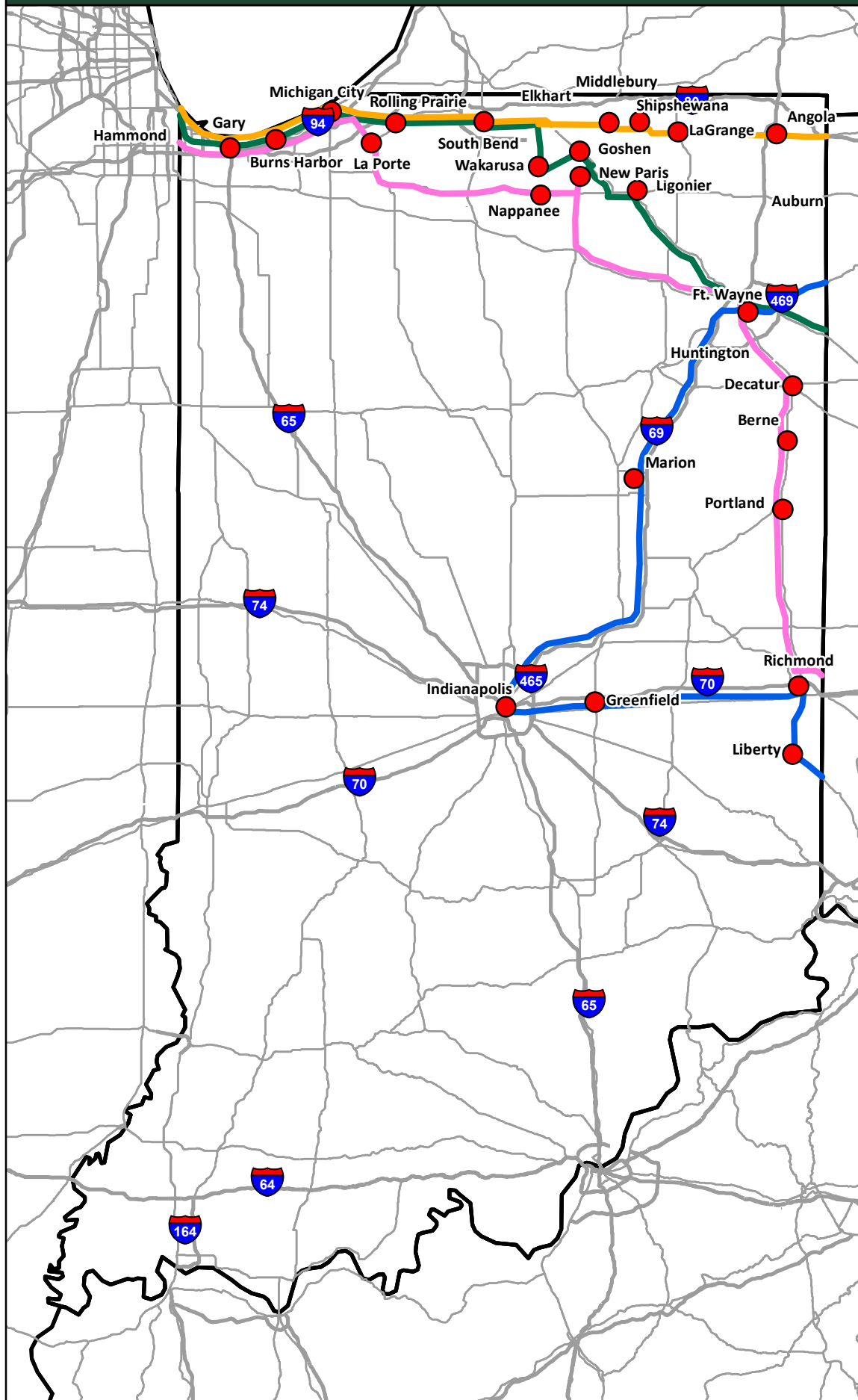
- ◆ Liberty – Fort Wayne via Richmond, Greenfield, Indianapolis and Marion – schedules 0014/0015
- ◆ Fort Wayne – Gary via Ligonier, Goshen, Wakarusa, South Bend and Rolling Prairie – schedules 0021/0022
- ◆ Richmond, IN – Gary via Portland, Berne, Decatur, Fort Wayne, New Paris, Nappanee, LaPorte, Michigan City, and Burns Harbor – schedules 0023/0024
- ◆ Angola – Gary via LaGrange, Shipshewana, Middlebury, South Bend, and Burns Harbor – schedules 0025/0026

Exhibit 1 displays the Indiana routes and stops operated by Barons. These routes had continued growing ridership prior to the COVID-19 pandemic. Barons also works closely with the Departments of Transportation in West Virginia and Ohio, participating in both states' intercity bus programs and receiving Section 5311(f) funding. The carrier has expanded operations in these states, and significantly increased intercity bus service within these corridors.

Barons Bus currently uses the Transcor Ticketing Solution for online ticket sales. As the replacement for the MAX ticketing system, the company has experienced positive operating results with Transcor. The Transcor online portal is fully integrated with the intercity bus network. Transcor allows for more accurate passengers counts, as all tickets are tracked into one system.

The carrier currently offers interlining services with Greyhound and operates out of the Greyhound terminals in Indianapolis, South Bend, Gary, and Ft. Wayne. Barons offers over 200 meaningful connections daily to the national intercity bus network. The Barons' Indiana service is addressed further in the Existing Section 5311(f)-supported Service section of the study.

Exhibit 1: Barons Bus Routes



INDOT Intercity Bus Assessment 2021



Legend

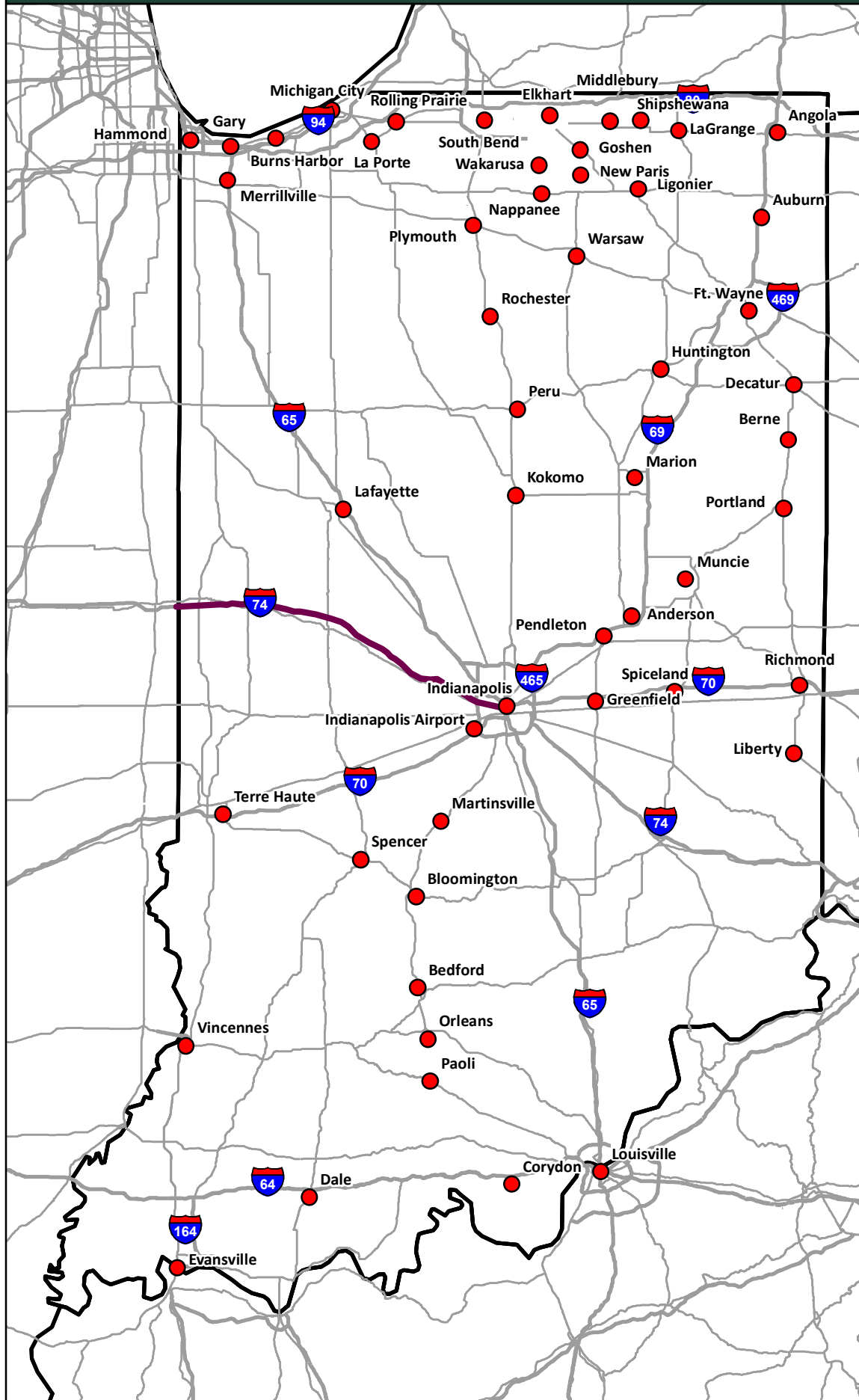
Route

- Liberty to Ft. Wayne
- Ft. Wayne to Gary
- Angola to Gary
- Richmond to Gary

Burlington Trailways

Burlington Trailways, with its home in Burlington, Iowa, continues to operate the same route between Champaign, IL and Indianapolis via I-74 that it has operated for many years (see Exhibit 2). There are two daily trips in each direction, with one extending to Denver and the other ending in Davenport. Indianapolis is the easternmost scheduled route service stop for Burlington Trailways. Burlington Trailways is a bridge carrier, meaning that they rely on connections at the end of routes. These meaningful connections allow passengers to travel nationwide. In Indianapolis, Burlington connects with Greyhound, Miller Transportation, and Barons Bus. As noted in the 2017 Study, service to Crawfordsville has been terminated, resulting in Indianapolis being the only Indiana stop on the route. Burlington uses the Indianapolis Greyhound Station. Indianapolis continues to have four stops, with two in each direction along the route. – schedule 7097

Exhibit 2: Burlington Trailways Routes



INDOT Intercity Bus Assessment 2021



Legend

- Intercity Stops
- Burlington
- Trailways Non-Subsidized
- States

Greyhound Lines

Greyhound, with its headquarters in Dallas, is the only intercity bus carrier in the country whose network offers service across the nation. Today, Greyhound Lines, Inc. operates 123 routes serving over 2,400 destinations across the United States.[†] As was the case in 2017, today the carrier operates four routes through Indiana serving the cities of Evansville, Gary, Indianapolis, Lafayette, South Bend and Terre Haute (see Exhibit 3). As a result of the pandemic, Greyhound has indicated that no communities across the nation have been abandoned, but several stops have been converted to unmanned "estops" where tickets must be purchased online and some schedules have been reduced.

Greyhound buses also stop at stations belonging to partner bus companies. At most of these locations, representatives are able to sell tickets for Greyhound routes. Greyhound has a standardized interline (thru ticketing/passenger sharing) agreement with dozens of transit operators around the nation; however, none of these are in Indiana. The carrier's schedule tables can be found in Russell's Official National Motor Coach Guide, on the North America Bus Table (NABT) at nabtguide.com and at Greyhound's website. In the 2017 Study, Greyhound indicated that they were planning to cease publishing in Russell's Guide, but this practice continues today.

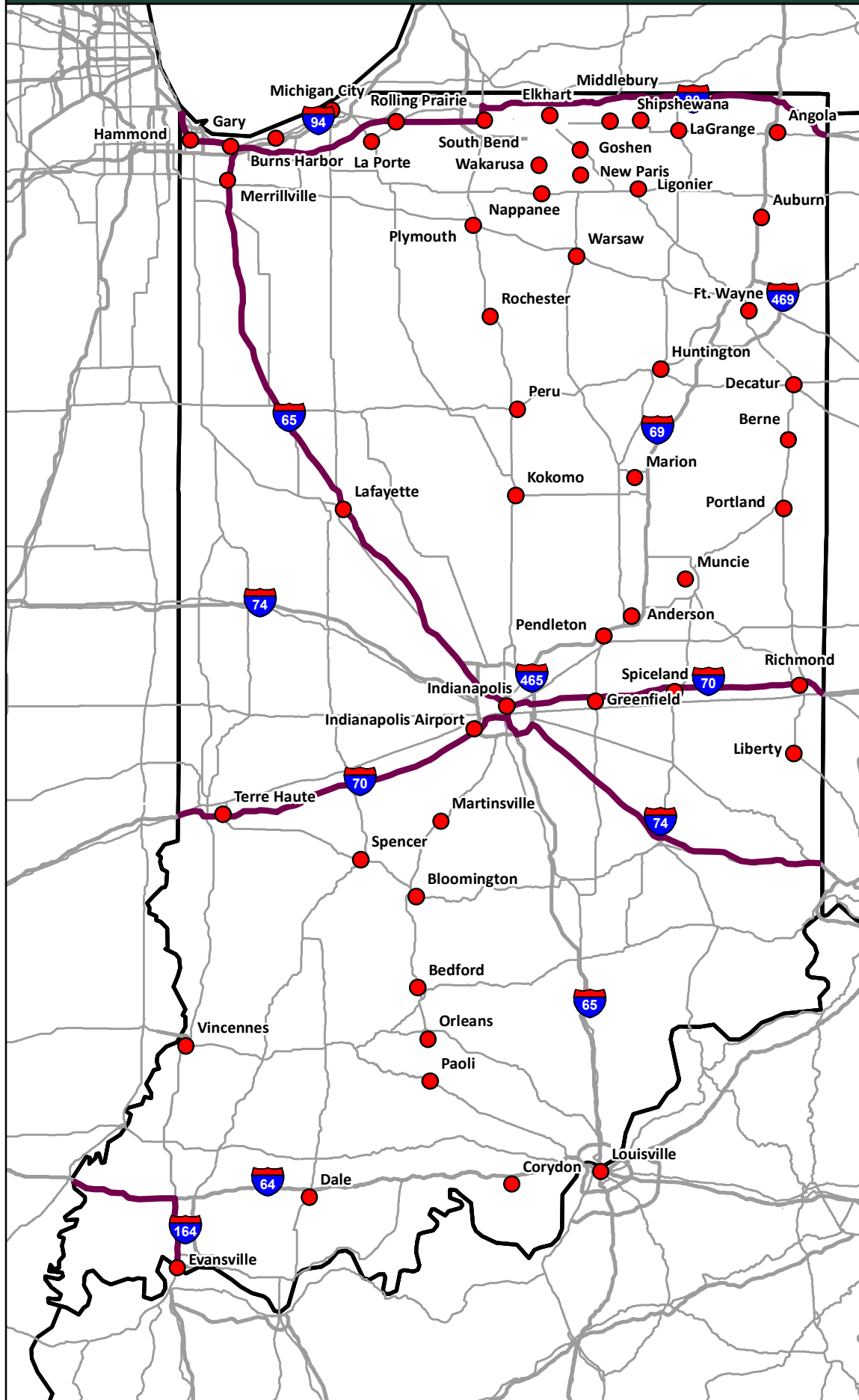
It is important to note that on October 21, 2021, it was announced that Greyhound had been purchased by FlixBus, a German-owned intercity bus operator. Greyhound had been a subsidiary of FirstGroup PLC, the British transit operator, since 2007. Only time will determine the impact of this business transaction on the country's, and more particular Indiana's, intercity bus network.

The four Greyhound routes serving Indiana are:

- ◆ Pittsburgh – Chicago via South Bend and Gary – schedule 200
- ◆ Pittsburgh – St. Louis via Indianapolis and Terre Haute – schedule 202
- ◆ Chicago – Louisville via Gary, Lafayette, and Indianapolis – schedule 238
- ◆ St. Louis – Nashville via Evansville – schedule 280

[†] Wikipedia

Exhibit 3: Greyhound Routes



INDOT Intercity Bus Assessment 2021



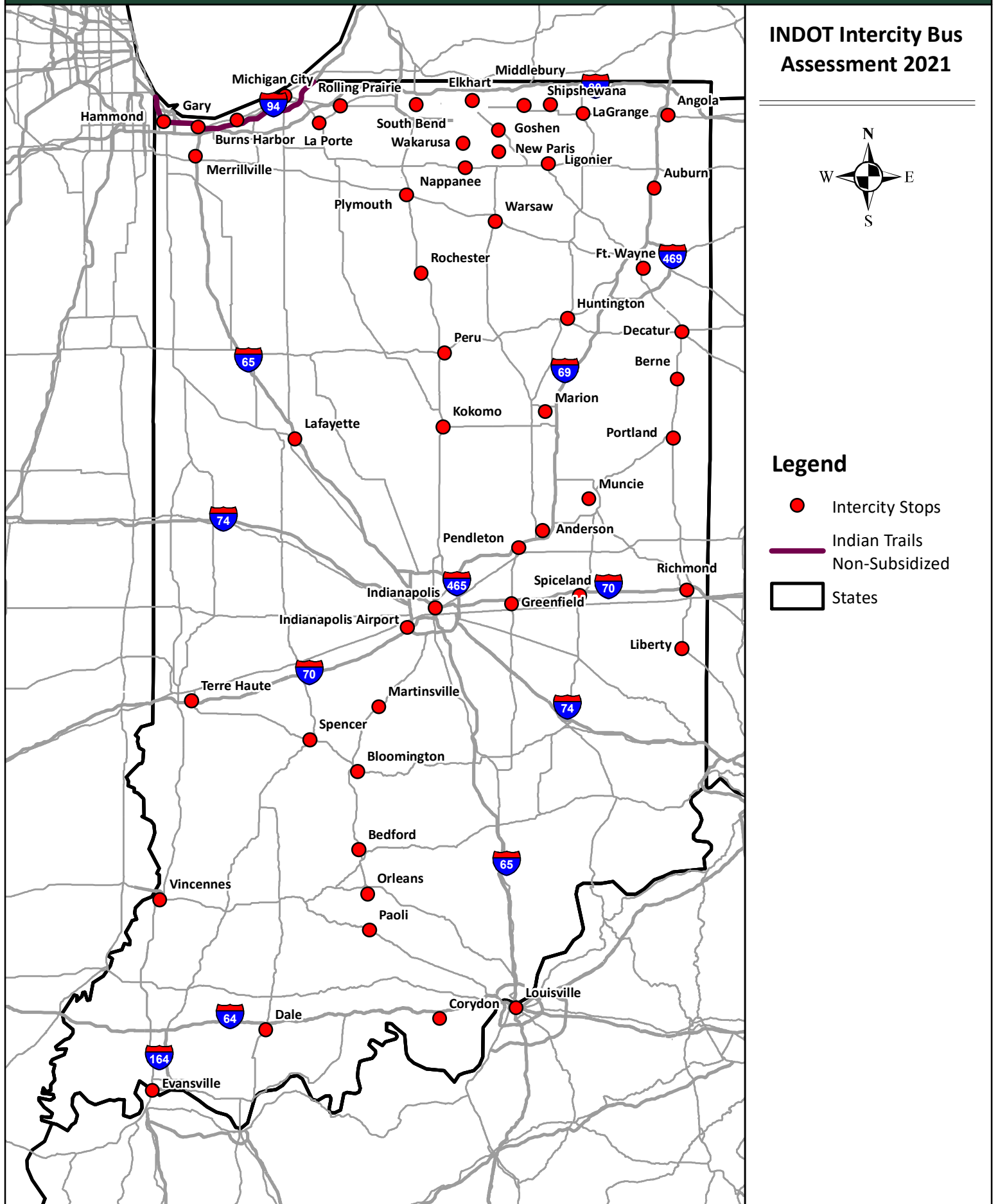
Legend

- Intercity Stops
- Greyhound Non-Subsidized
- ▭ States

Indian Trails

Indian Trails operates out of Owosso, Michigan. The company operates primarily in Michigan, with service into Chicago and Milwaukee and very limited Indiana service. The service through Indiana is part of the company's extensive Chicago to Michigan schedule, with a stop in Gary. Indian Trails currently operates along the I-90/I-94 corridor between Chicago and Bay City, Michigan, including two stops in Gary in each direction (see Exhibit 4). The Indiana stops and level of service has not changed since the 2017 Study. - schedules 1482/1486

Exhibit 4: Indian Trails Routes



Miller Transportation

Miller Transportation, Inc. has its corporate headquarters in Louisville, Kentucky and is Indiana's largest operator of fixed route, scheduled intercity bus service. In 2019, Miller operated approximately 1,382,620 miles in Indiana, serving 32 communities directly and others through interline agreements with their partnering carriers. The company provides fixed route service directly to communities in Illinois, Indiana, Kentucky, Michigan, Ohio, Tennessee, and West Virginia. In fiscal year 2019, Miller transported roughly 195,000 passengers in fixed route service and operated more than 3,000,000 miles over its network. Regionally, Miller and its subsidiaries own or lease and operate a total of approximately 30 terminals and three maintenance facilities.

It should be noted that Miller was the first intercity bus carrier in the country to successfully implement and partner with Greyhound for the In-Kind Match program. In 2010, Hoosier Ride, a public-private partnership between Greyhound Lines, INDOT, and Miller Transportation, was successfully launched with Section 5311(f) support. Hoosier Ride operates as a subsidiary of Miller. Today, Miller Transportation operates more than 650,000 miles annually in subsidized service for the state of Indiana, over 113,000 miles annually in subsidized service for the Commonwealth of Kentucky, and more than 102,000 miles annually in subsidized service for the state of Michigan.

As noted below, Miller's Indiana service consists of six Section 5311(f)-supported routes, along with three routes that are not supported with FTA funds (see Exhibit 5). These routes have stops in 32 communities in the state. The Richmond to Gary route with stops in Richmond, Fort Wayne, Warsaw, Merrillville, and Gary was added as a Section 5311(f) funded route in 2017, having been operated previously without Section 5311(f) funding. Miller's Indiana routes with their respective schedules are:

Miller Section 5311(f) Funded Routes

- ◆ Louisville – Evansville via Corydon, Dale, Evansville Airport and Evansville. – schedules 0361, 0364
- ◆ Indianapolis – Elkhart via Kokomo, Peru, Rochester, Plymouth, South Bend and Elkhart. – schedules 0354, 0355
- ◆ Indianapolis – Evansville via Martinsville, Bloomington, Spencer, Terre Haute, Vincennes and Evansville. – schedules 0367, 3661
- ◆ Indianapolis – Muncie via Pendleton, Anderson, Muncie, Huntington, Fort Wayne and Auburn. – schedules 0009, 0010, 0011, 0012
- ◆ Louisville – Indianapolis via Paoli, Orleans, Bedford, Bloomington, Martinsville and Indianapolis. – schedules 0358, 0359
- ◆ Fort Wayne – Gary via Warsaw, Merrillville and Gary. – schedules 0350, 0353

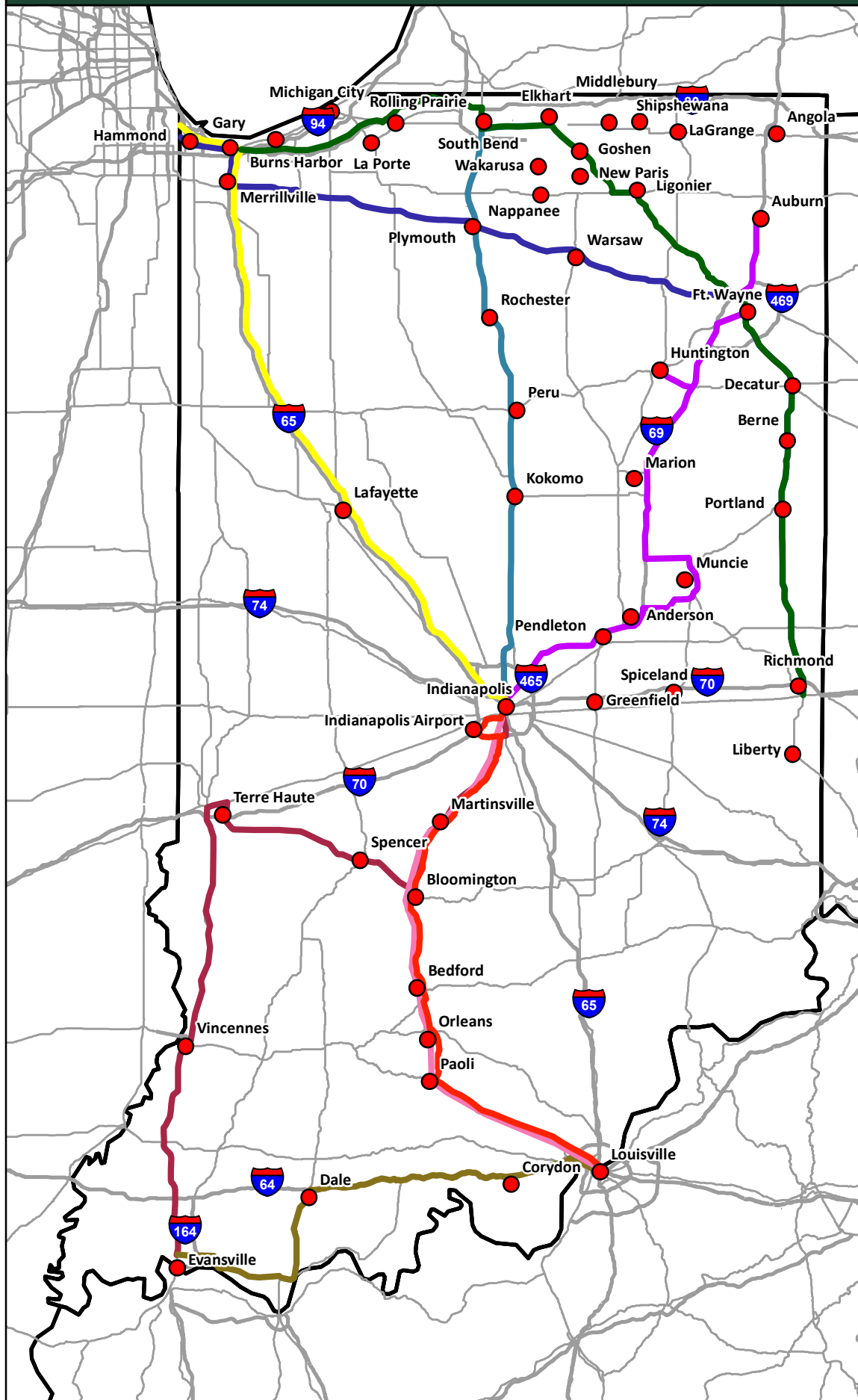
Miller Unsubsidized Indiana Routes

- ◆ Indianapolis – Chicago via Lafayette, Merrillville, Gary, and Hammond. – schedules 0358, 0359, 0373
- ◆ Chicago – Columbus, Ohio via Gary, South Bend, Elkhart, Fort Wayne, and Richmond. – schedules 0351, 0352
- ◆ Indianapolis – Louisville via Indianapolis Airport and Bloomington. Schedule 0375

Note that the Indianapolis to Muncie route began operating past Muncie to Detroit in October 2021 with the reopening of the Canada-U.S. border. With the closing of the U.S.-Canada border due to the pandemic, the service was previously ending in Port Huron, Michigan.

Additional information regarding the Section 5311(f)-funded routes operated by Barons and Miller is provided later in the Existing Section 5311(f)-Supported Service portion of this study. The Chicago to Columbus, OH and Indianapolis to Louisville routes that are operated by Miller independent of Section 5311(f) support, and were operated at the time of the 2017 Study. The Indianapolis to Chicago route serving Lafayette, Merrillville, Gary, and Hammond has been added since that time. The Chicago to Columbus, Ohio route has added stops in Gary and Elkhart, while the Indianapolis to Louisville route has been modified to remove stops in Hammond, Lafayette, and Bedford while adding stops at the Indianapolis Airport and Bloomington.

Exhibit 5: Miller Transportation Routes



INDOT Intercity Bus Assessment 2021



Legend

- Intercity Stops
- Miller Non-Subsidized**
 - Chicago - Columbus (OH)
 - Indianapolis - Chicago
 - Indianapolis - Louisville
- Miller Subsidized**
 - Evansville - Louisville
 - Fort Wayne - Gary
 - Indianapolis - Elkhart
 - Indianapolis - Evansville
 - Indianapolis - Muncie
 - Louisville - Indianapolis
- States

Lakefront Trailways

Due to Lakefront Trailways having once served Indiana and its connecting service with other Indiana intercity bus carriers, it is worthy to note that in July 2020, Coach USA, Lakefront's parent company, announced that it was ceasing Lakefront's operations due to the COVID-19 pandemic. Coach USA noted that it planned to close the Lakefront operations on or about September 16, 2021, with more than 320 employees being permanently laid off. Lakefront was Ohio's largest intercity bus company.

As an example of COVID-19's impact on the nation's intercity bus service, Coach USA, one of the country's largest bus companies, has laid off almost 3,000 of its 5,000 employees across 35 states and the remaining have taken a 40 percent pay cut.

Long Distance "Curbside" Intercity Bus Carriers

Curbside intercity bus carriers are distinct from the traditional intercity services described above, primarily because of their curbside boarding on city streets rather than at bus terminals and they charge much lower fares relative to the traditional intercity bus companies. Over the past several years, the ridership on these carriers have continued to increase and service has expanded, forming a network of curbside bus routes concentrated on the East Coast and expanding nationwide.

Over the years, there have been several high-profile accidents involving these low-cost curbside carriers, which has resulted in raised concerns as to the safety of these carriers as opposed to the traditional intercity bus carriers (articles cited below). The Federal Motor Carrier Safety Administration (FMCSA) compiled a database of the safety of these carriers as compared to all other carriers. However, due to the unreliability of the data, the data analysis was not considered credible, and conclusions could not be drawn regarding the safety of these carriers without more evidence. Another concern is that these carriers often unexpectedly change names, contract services, and close to reopen as a different company, possibly to avoid regulations. This increases the difficulty of maintaining accurate safety records.

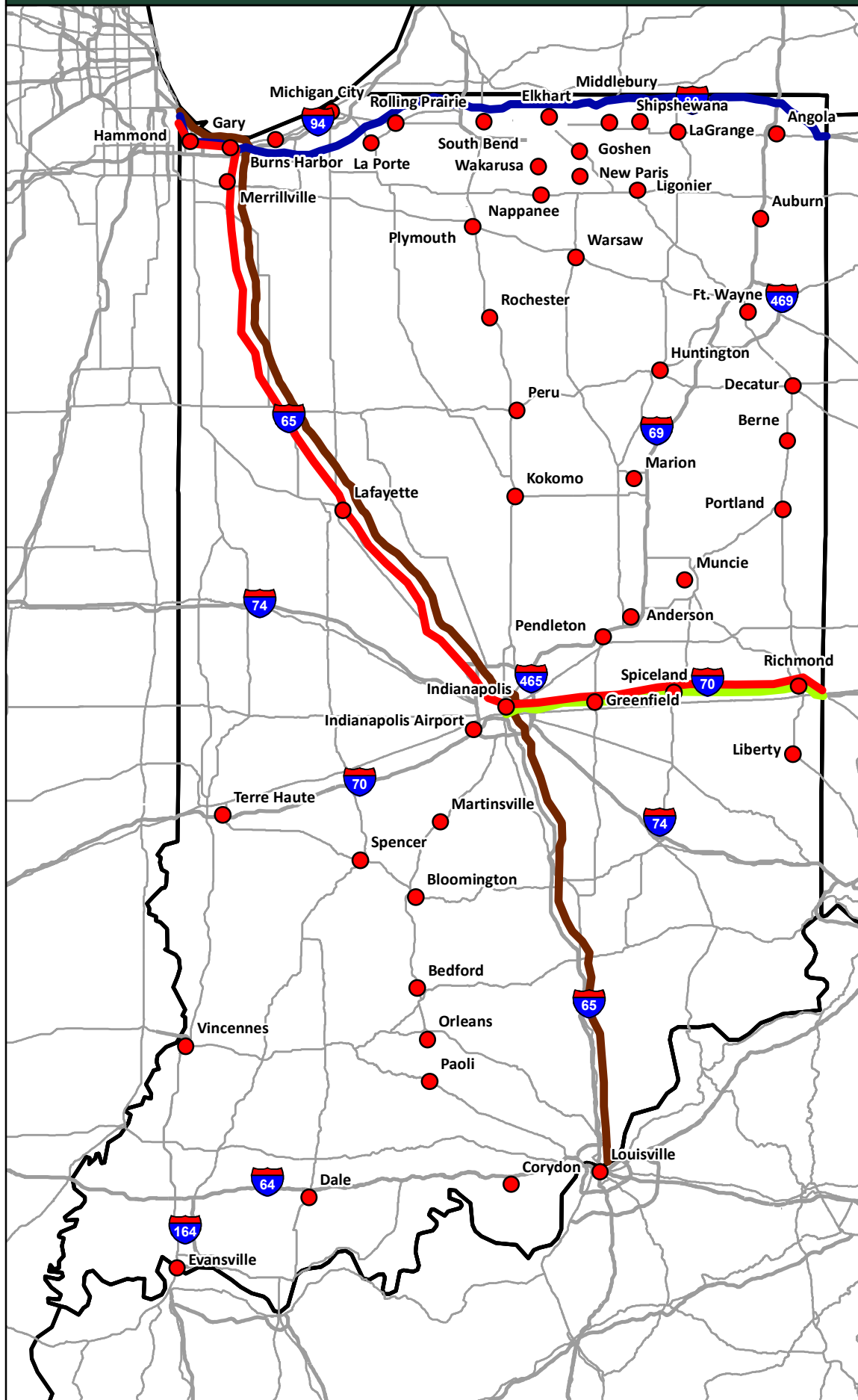
- ◆ Grynbaum, Michael M. (October 31, 2011). ["High Fatality Rate Found for Low-Cost Buses."](#) ***The New York Times***.
- ◆ Kille, Leighton Walter (February 27, 2013). ["National Transportation Safety Board: Report on Curbside Motorcoach Safety."](#) ***Journalist's Resource***.

New York City serves as the primary east coast hub for intercity curbside bus services, which started in 1998. In general, they operate independently and do not interline or participate in the National Bus Traffic Association. Curbside carriers typically sell tickets online, operate express services with limited stops, offer low fares (sometimes selling a few seats on each departure at very low prices), and often offer amenities such as on-board wifi.

Megabus, a Coach USA-owned company, is the most well-known of the curbside carriers. Greyhound competes with its curbside version called Boltbus in the northeast and northwest parts of the country, with no Indiana operation. D&J Bus, FlixBus, and Wanda Coach are curbside carriers that operate in Indiana in addition to Megabus. Exhibit 6 depicts the routes operated by these curbside intercity bus operators.

Note that these small curbside carriers come in and out of the market routinely, so it is possible that there may be other such carriers operating in Indiana that the study's research did not uncover.

Exhibit 6: Curbisde Intercity Bus Routes



INDOT Intercity Bus Assessment 2021



Legend

- Intercity Stops
- FlixBus
- Wanda Coach
- D&J Routes
- Megabus
- States

D&J Bus

D&J Bus, founded in 2009 and operating out of Bryans Road, Maryland, is one of a growing list of long-distance intercity bus carriers with cheap fares that board curbside. The lowest fares are offered to those who book early, so the less popular schedules tend to be less expensive. D&J operates a few routes primarily between Chicago and New York, with two routes stopping in Gary and South Bend.

FlixBus

FlixBus, founded in 2011, is a German company that offers intercity bus service in Europe and the United States. FlixBus is the US operations of FlixBus, as noted previously, the recent buyer of Greyhound. The FlixBus business model dictates that the company does not own any buses and does not employ drivers; its services run in cooperation with regional bus companies, primarily small and medium sized bus operators, to serve major intercity bus network lines. Local partners are responsible for the day-to-day running of routes, while FlixBus is responsible for permits, network planning, marketing, pricing, quality management and customer service and retains 25–30 percent of the ticket price, remitting the remainder to its operating partners. FlixBus initiated its U.S. service in May 2018, with midwest routes starting in July 2021. The carrier operates a number of long-distance routes, with stops in Indianapolis and Lafayette, and connections available to several U.S. cities.

Megabus

Megabus, introduced in 2006, was the first non-traditional “curbside” intercity bus carrier. The Chicago-based carrier is a subsidiary of Coach USA and operates in the east, southeast, south central, and midwestern portions of the country. Their service model of long-distance trips and low fares has resulted in Megabus becoming a major competitor to the traditional carriers in certain regions across the country.

As was the case in 2017, Megabus serves only Indianapolis in the state, with service available to Atlanta, Chattanooga, Chicago, Cincinnati, Louisville, and Nashville. There continue to be six schedules available daily to and from Indianapolis, Chicago, and Cincinnati, but only two daily schedules from Indianapolis to the other cities.

Wanda Coach

Wanda Coach provides intercity bus service primarily between New York and Atlanta with stops in North Carolina, South Carolina, and Virginia. The carrier currently provides service from Indiana to New York City and Philadelphia. The carrier is based out of New York City.

Amtrak Passenger Train Service

Indiana is served by four Amtrak routes; Capitol Limited, Cardinal, Lake Shore Limited, and Wolverine. *The Hoosier State* was an INDOT-supported [Amtrak](#) passenger train that provided service between Chicago and Indianapolis with stops in Crawfordsville, Dyer, Lafayette and Rensselaer. Under a 2008 federal law, services such as the Hoosier State train require state sponsorship. Indiana became responsible for funding *The Hoosier State* beginning on October 1, 2013. It was suspended indefinitely on June 30, 2019, after funding for the train was not written into Indiana's 2019 state budget plan.

However, *The Cardinal* continues to provide service thrice-weekly between Chicago and Indianapolis, serving the same communities as *The Hoosier State*, plus Connersville.

In addition to *The Cardinal*, the *Capital Limited* runs daily between Chicago and Washington, DC with stops in South Bend and Elkhart. The *Lake Shore Limited* operates daily between Chicago and New York, with stops in South Bend, Elkhart and Waterloo. The *Wolverine*, one of Michigan's state-supported routes, has stops in Hammond/Whiting and Michigan City on its route from Chicago to Detroit/Pontiac.

Table 3 depicts the Indiana communities with an Amtrak station/stop and the name of the train(s) serving each community. Table 4 illustrates Indiana's Amtrak stations/stops and the number of boardings and alightings for fiscal years 2018 and 2019. These are the same Amtrak stations/stops that operated at the time of the 2017 Study.

Table 3: Indiana Amtrak Service

Amtrak Stations/Stops	Service Trains
Connersville	Cardinal
Crawfordsville	Cardinal
Dyer	Cardinal
Elkhart	Capital Limited, Lake Shore Limited
Hammond - Whiting	Wolverine
Indianapolis	Cardinal
Lafayette	Cardinal
Michigan City	Wolverine
Rensselaer	Cardinal
South Bend	Capitol Limited, Lake Shore Limited
Waterloo	Capital Limited, Lake Shore Limited

Table 4: Amtrak Indiana Boardings & Alightings by Stop

City	Boardings & Alightings	
	2018	2019
Connersville	448	607
Crawfordsville	4,988	5,716
Dyer	2,991	3,198
Elkhart	20,631	21,875
Hammond-Whiting	5,167	5,848
Indianapolis	24,937	29,431
Lafayette	13,307	16,997
Michigan City	2,662	2,720
Rensselaer	1,754	1,816
South Bend	19,931	21,260
Waterloo	20,995	21,866
Total Indiana Station Usage	117,811	131,334

It is interesting to note that the 2021 DePaul University study concluded that Amtrak was proving to be a particularly vigorous competitor to intercity bus lines during early 2021. The study found that

individuals booking trips 10 days in advance will find fares on Amtrak below those for bus travel on about a third of the routes evaluated. This vigorous fare discounting is partially in response to Amtrak's diminished schedule frequency in many corridors.

While fiscal year 2020 ridership is not yet available by state, Amtrak reports that the pandemic took a major toll on ridership across its national network. During fiscal year 2020, Amtrak customers took 16.8 million trips, a year-over-year decrease of 15.2 million passengers. McKinsey & Company, a global management consulting firm, projects that Amtrak will recover to 78 percent of pre-pandemic ridership in 2022 and up to 90 percent by 2023.

It should be noted that INDOT has provided more than \$1 million in financial assistance for capital improvements to the historic Amtrak Beech Grove maintenance facility, Amtrak's largest heavy maintenance facility located in Beech Grove, southeast of Indianapolis. This funding helped Amtrak renovate buildings used to expand repair services and secure jobs of Beech Grove and Indianapolis area residents.

Amtrak Thruway Motorcoach Service

Amtrak Thruway Motorcoach is Amtrak's system of Amtrak-owned intercity coaches, locally contracted transit buses, through-ticketed local bus routes, and taxi services. They connect areas not served by Amtrak train routes or stations which are disconnected temporarily due to service delays or track maintenance issues to Amtrak train stations. Amtrak most commonly contracts the service with Greyhound.

Passengers may purchase both train and Thruway Motorcoach tickets together from Amtrak for the length of a passenger's journey, and the connections are timed for guaranteed transfers between the two services. In addition to providing connecting service to unserved areas, some Thruway Motorcoaches are operated to provide additional service along well-established, high ridership passenger rail corridors. Amtrak also sets up Thruway Motorcoach service for situations when there are disruptions to normal rail service.

As was the case in the 2017 Study, there are two Amtrak Thruway Motorcoach routes in Indiana. One route operates as a through-ticketed Greyhound route between Chicago and Louisville with connections to Amtrak stops in Dyer, Rensselaer, Lafayette, and Indianapolis. The second route operates as a through-ticketed Burlington Trailways route between Davenport, Iowa and Indianapolis with a stop in Crawfordsville. Amtrak's Indiana routes, stops, and Thruway Motorcoach services are illustrated in Exhibit 7.

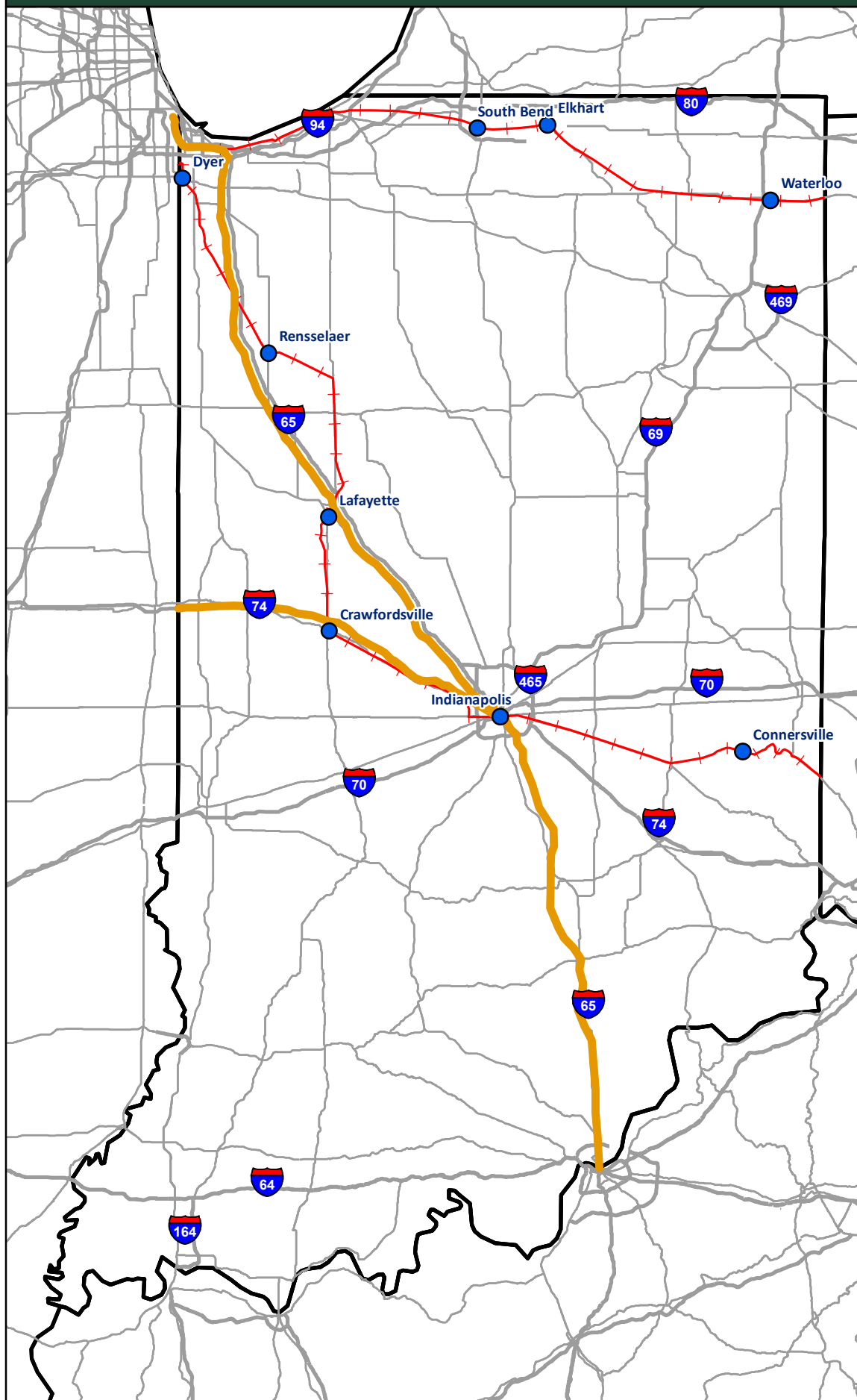
Barons has direct connections with Amtrak in West Virginia and has contemplated connecting with their Indiana routes, but Amtrak's limited schedule times have not allowed this connection to happen. Barons operates out of the Greyhound/Amtrak terminal in Indianapolis, South Bend (airport), Toledo, Ohio, and Ann Arbor, Michigan. In Chicago, Barons uses the Greyhound station that is only one-half mile from the Amtrak terminal. The adjustment of schedules by either Barons or Amtrak could result in these Indiana connections becoming a reality.

Miller has direct connections with Amtrak throughout Michigan including Detroit and operates out of the Amtrak Station in Port Huron. The carrier has indicated that they are working with Amtrak to operate service between Niles and South Bend and will possibly be entering a partnership with

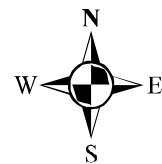
Greyhound and Amtrak to operate service in the Amtrak station in Lafayette and Elkhart. Miller noted that it serves as a thruway carrier between Louisville-Chicago as an alternative when Greyhound's vehicle is at capacity.

Additionally, the South Shore Line is an electrically powered interurban commuter rail line operated by the Northern Indiana Commuter Transportation District (NICTD) between downtown Chicago and the South Bend International Airport, with stops in Gary and Michigan City. The name refers to both the physical line and the service operated over that route. Passenger operation on this line was assumed by the NICTD in 1989. The South Shore Line is one of the last surviving interurban trains in the United States. South Shore Line operates are 20 trains eastbound and 16 trains westbound.

Exhibit 7: Amtrak Routes



INDOT Intercity Bus Assessment 2021



Legend

- Amtrak Stops
- Amtrak Thruway
- Amtrak Routes
- States

Chapter 4 INDOT Section 5311(f) Program

INDOT Intercity Bus Program

INDOT has continued its practice of expending all of its approximately \$2.78 million annual Section 5311(f) apportionment on intercity bus service operating costs, with no funds used for carrier capital expenses. The INDOT Section 5311(f) Intercity Bus Program Application Package states: “Given the limited amount of Section 5311(f) funding available, capital funding for vehicles or facilities would not go far and would have only an indirect impact on the goal of better meeting the state’s intercity bus service needs.” The highest priority of INDOT’s intercity bus program is the preservation of cost-effective existing intercity bus services, with the next priority being the development of new intercity services, or feeder service to existing intercity routes from areas that do not currently have intercity connections.

At the time of the 2017 Study, INDOT contracted with Barons Bus Lines, Miller Transportation, Inc., and the City of Marion for the provision of the Section 5311(f)-supported service. Now only Barons and Miller receive Section 5311(f) funding from INDOT, with the City of Marion last receiving the funding in 2018 for a user-side subsidy intercity bus service. The City of Marion received approximately \$8,000 annually in Section 5311(f) funds as reimbursement for the user-side subsidies and \$9,600 for the marketing and administration of the service. Barons and Miller have routinely responded to INDOT’s solicitation of intercity bus applications and have subsequently submitted applications that meet FTA and INDOT requirements. All Section 5311(f) grants are annual over a calendar year.

It is important to note that INDOT administers its intercity bus program differently than many states by soliciting intercity bus program grant applications rather than using a competitive RFP process. This results in the carriers being subrecipients rather than third-party contractors. This affects the federal guidelines that the carriers must follow, particularly in the program management, financial management, procurement, and charter and school bus categories. The carriers apply for funding for the routes and schedules they wish to operate, rather than responding to an RFP or grant solicitation in which the state designates particular corridors or services. The grants are annual for a calendar year.

The INDOT Section 5311/5339 State Management Plan notes that federal guidelines require the state to advertise the availability of Section 5311(f) funds, review potential projects for compliance with federal and state criteria and fund projects that are viable. The State Management Plan explains that INDOT undertakes extensive efforts to promote the availability of funding offered through the Section 5311(f) program. It states that INDOT will solicit projects in the spring by written notification and posting notices in local newspapers around the state. Each fall, INDOT provides the opportunity for public comment regarding the unused intercity funds by publishing a public notice in all major newspapers in Indiana and notifying via mail intercity bus carriers providing service in Indiana. The public comment period is 14 days. If no written or verbal comments are received in response to these notices, a letter from the Governor to the FTA Regional Administrator certifies that the intercity bus service needs of Indiana are being adequately met, and any unused funds are transferred to program

reserve. The State Management Plan further indicates that charter and tour services are not eligible for Section 5311(f) assistance in accordance with federal regulation 49 CFR Part 604.

The 2017 Study noted that both Barons and Miller were receiving Section 5311(f) funds to operate a redundant Richmond to Gary route with different stops. The Barons route had stops in Berne, Fort Wayne, Nappanee and Michigan City, while the Miller Richmond-to-Gary route had stops in Fort Wayne and Warsaw. The route was the worst-performing route for each carrier, particularly Barons, due to the fact that the two carriers were splitting the market along the route. The 2017 Study called for INDOT to consult with both carriers to determine the most cost-effective option to continue the route.

Today, Barons continues to operate their Richmond-to-Gary route with additional stops in Portland, Decatur, New Paris, LaPorte, and Burns Harbor. Miller operates an unsubsidized route between Chicago and Columbus, Ohio, with stops in Gary, South Bend, Elkhart, Fort Wayne, and Richmond. The subsidized Fort Wayne-to-Gary route stops in Warsaw and Merrillville, with no Richmond service. Under the current operating scenario, Fort Wayne is the only duplicated stop [excepting the shared terminus of Gary] between the two carriers on their respective Richmond-to-Gary and Fort Wayne-to-Gary routes.

This route duplication had been possible because INDOT allowed carriers to apply for funding to operate an already-subsidized route at the time. While this policy could lead to more cost-effective service, it is important to not use Section 5311(f) funds to operate duplicated service, regardless of route subsidies. INDOT no longer funds route duplication, as evidenced its rejection of Barons' 2021 request to fund an Indianapolis-to-Louisville route along I-65 due to Miller also operating an Indianapolis to Louisville route.

Surrounding States' Intercity Bus Programs

The purpose of this section is to provide an overview of the intercity bus programs managed by surrounding state DOTs to illustrate the different approaches to administering the Section 5311(f) program. Summaries are provided for the intercity bus programs managed by the State DOTs of Illinois, Kentucky, Michigan, New York, Ohio, Pennsylvania, and West Virginia.

Illinois DOT (IDOT)

IDOT does not contract directly with the intercity bus carriers. IDOT has three active intercity bus projects. Two Section 5311 subrecipients, one in the southern part of the state and another in the central and southeast sections of the state, operate their own intercity bus service, while a Section 5311 subrecipient in the northern portion of the state contracts with Greyhound to operate a route.

IDOT had annually submitted a Governor's Certification that all intercity bus needs in the state were being met, and used the Section 5311(f) funds for other rural transportation needs in the state. At FTA's encouragement to use all of its large amount of remaining Section 5311(f) funds for rural intercity service, IDOT decided to embark on a three-year special intercity bus program initiative, resulting in some new routes, bus procurements, and upgraded capital projects, ultimately expending its entire 15% apportionment. One of the new subsidized routes was operated by Greyhound

Kentucky DOT (KYDOT)

In its effort to promote coordination and to prevent duplication of services, the Kentucky Transportation Cabinet (KYTC) does not contract directly with for-profit intercity bus companies, consistent with both ODOT and IDOT practices. The intercity bus company must apply and be funded through an existing Section 5311 public transit operator. KYDOT has structured their intercity bus program so that KYDOT is the entity that holds the Section 5311(f) funded carriers accountable, thus removing much of the responsibility from the Section 5311 subrecipient serving as a pass-through.

Michigan DOT (MDOT)

MDOT provides the annual intercity bus application instruction packet to intercity bus providers operating in the state. This gives the providers an opportunity to review Section 5311(f) program information and application requirements on an annual basis. MDOT funds intercity bus carriers directly, not requiring the use of a pass-through agency. OPT has one full-time employee assigned to provide technical assistance to intercity bus carriers.

If MDOT determines all intercity needs have been met or it does not have sufficient state match for the 5311(f) funds, a letter is sent to the Michigan intercity carriers and public transit agencies requesting intercity projects and if needed, local match. This consultation process is in addition to consultation through the annual application process and routine communications with the intercity carriers operating in Michigan. Eligible uses of the state administered Section 5311(f) funds include, but are not limited to: facility improvements for intercity bus use, intercity bus shelters, signage, vehicles, or vehicle related equipment such as wheelchair lifts for use in intercity service, and operating assistance.

New York State DOT (NYSDOT)

Since 1974, the State of New York has continued to support the State's private, for-profit intercity bus service with State Operating Assistance Program (STOA) funds administered by NYSDOT. NYSDOT has achieved the program's first priority, to preserve intercity bus service in rural areas, through the provision of operating assistance, and met a secondary goal of expanding rural intercity bus service in the State. For Section 5311(f) funding only, private intercity bus operators are eligible subrecipients and contract directly with NYSDOT. Together, the STOA and Section 5311(f) programs annually support 98 routes in the state. NYSDOT solicits intercity bus projects every two years within the general Section 5311 application process.

Ohio DOT (ODOT)

ODOT is quite unique as one of the few state DOTs that does not fund intercity bus carriers directly. State regulations limits ODOT's authority to "issue grants from any public transportation grant appropriation to county transit boards, regional transit authorities, regional transit commissions, counties, municipal corporations, and private nonprofit organizations that operate or will operate a public transportation system." Private intercity bus operators are not recognized as being an eligible direct grant recipient, although they are eligible recipients via a pass-through from an eligible subrecipient. Subsequently, it is the responsibility of the Section 5311 subrecipient to administer the contract with the intercity bus carrier, including oversight of operations.

ODOT's Rural Intercity Bus Program, known as GoBus, consists of intercity bus routes operated by Barons Bus and Miller Transportation. Section 5311(f) funds are provided to the carriers by a pass-through agreement with a community action program. This has resulted in some contentious issues with this contractual relationship. The pass-through agency receives approximately \$400,000 in Section 5311(f) funds annually to administer the program and market the service. ODOT annually utilizes all of its Section 5311(f) set aside.

Pennsylvania DOT (PennDOT)

Priorities of the state's intercity bus program are the continuation of existing services that would otherwise be threatened with discontinuance or a major reduction in service frequency, especially in areas with no other intercity bus service. Proposals for new services would include increasing the level of service in a corridor or to test new markets.

The state's intercity bus program has been structured around the state legislation that has provided state funding for 25 percent of the net deficit, matched by 25 percent to be provided by the carrier, and 50 percent from the Section 5311(f) program. Funding is provided as an annual grant to the carriers, who apply for the funding for the routes they seek to operate under the FTA subsidy. The carriers define the service network and establish the fares. The grants cover the state fiscal year and are renewed annually. There is no RFP process or procurement for service. The state provides a manual to the carriers detailing the financial requirements and reporting for the Section 5311(f) grant. Some carriers have dropped out of the program due to the local match requirement, with Greyhound and Fullington being the two remaining Section 5311(f) program participants.

West Virginia DOT (WVDOT)

Annually, WVDOT sends a notice to Barons, Greyhound, American Bus Association (ABA), and United Bus Operators of America (UBOA), and posts a notice on its website that applications for Section 5311(f) funds are being accepted. The DOT coordinates its intercity bus efforts with the adjacent states of Ohio, Maryland, Pennsylvania, and Virginia to ensure that Section 5311(f) funds are used effectively to serve the region.

Barons, as the subrecipient of the state's Section 5311(f) funds, works with Greyhound to develop the schedules and to identify available in-kind match that can be used as the local share. In its application to WVDOT, Barons describes the feeder and connecting service, identifies the locations served by each, and provides the cost of the connecting service which is used as in-kind.

Periodically, the DOT surveys the contiguous states of Ohio, Pennsylvania, Virginia, Maryland, and Kentucky regarding possible multi-state intercity bus projects. Several of the state's Section 5311 subrecipients provide meaningful feeder service connections to the state's intercity bus network. However, it is the state's policy to not classify the service as intercity bus.

<h4>Existing Section 5311(f)-Supported Service</h4>

Below is a description of the Section 5311(f)-funded services that are currently operated in Indiana. Notably, without the stops along Section 5311(f)-funded routes, only about 70 percent of the state's population would reside within 25 miles of a station or stop, and just 37 percent within 10 miles. The

same calculation when including all intercity bus stops in the state is 84 percent and 46 percent of Indiana's population residing within 25 miles and 10 miles respectively. This demonstrates the impact of the subsidized routes. An evaluation of the efficiency and effectiveness of these services based on specific performance measures is included later in this study. Population figures in the study come from the 2019 American Community Survey (ACS) 5-Year Estimates.

Barons Bus Lines

As previously noted, Barons operates four intercity routes with Section 5311(f) assistance, providing daily transportation service to 24 locations within Indiana. The routes include:

- ◆ Liberty - Fort Wayne via Richmond, Greenfield, Indianapolis and Marion
- ◆ Fort Wayne – Gary via Ligonier, Goshen, Wakarusa, South Bend and Rolling Prairie
- ◆ Richmond, IN - Gary via Portland, Berne, Decatur, Fort Wayne, New Paris, Nappanee, LaPorte, Michigan City, and Burns Harbor
- ◆ Angola – Gary via LaGrange, Shipshewana, Middlebury, South Bend, and Burns Harbor

These routes provide service to 20 rural locations in the state plus 4 urban areas, covering over 590,000 annual miles. A map of Barons-operated Indiana routes was provided previously in the study in Exhibit 1. More than 100 meaningful connections are provided to the ICB network. Note that a meaningful connection is any connection that is made within 2.5 hours of a bus arrival and the following bus departure. The Section 5311(f)-supported service provides over 50,000 annual trips during normal operating periods.

Table 5 depicts the ridership on these subsidized routes for the 2017–2020 period. Barons accounts for service to about 47 percent of Indiana's intercity bus stop locations. Below is a brief description of each Barons' Section 5311(f)-supported routes. For FY 2020, Barons received \$3,105,825 in FTA Section 5311(f) assistance. The carrier also received \$2,662,263 in CARES Act funds from INDOT.

Liberty to Fort Wayne

This Barons route provides daily service to Liberty, Richmond, Greenfield, Indianapolis, Marion, and Fort Wayne. These are the same stops that were served in 2017. The route extends to Cincinnati and Detroit to allow for enhanced connectivity to the intercity bus network. The route offers a total of 44 meaningful connections to the intercity bus network. Based on reported 2019 ridership, this route has approximately 22,000 annual passengers when not impacted by the pandemic.

Fort Wayne to Gary

This route offers daily service to Fort Wayne, Ligonier, Goshen, Wakarusa, South Bend, Rolling Prairie, and Gary. The route extends to Columbus, Ohio and Chicago to provide riders access to travel options well beyond the Barons operating area. The route, which Barons has operated for over four years, offers a total of 35 meaningful connections to the intercity bus network. This route served approximately 12,000 annual passengers in 2019.

This route receives Section 5311(f) funding from both INDOT and Ohio DOT. Between Columbus, Ohio and the Ohio-Indiana state line, the service is subsidized by Ohio DOT, and is marketed as GoBus Route E. The same bus continues on to Chicago, with INDOT subsidizing the Indiana segment of the service. The remaining portion of the route from the Indiana-Illinois state line to Chicago is unsubsidized. For obvious reasons, it is important that all segments of this route continue to be

operated by the same carrier. It would not be practical for either state to fund the route if a significant portion is not funded with Section 5311(f) funds.

Richmond to Gary

This route offers daily service to Richmond, Portland, Berne, Decatur, Fort Wayne, New Paris, Nappanee, La Porte, Michigan City, Burns Harbor, and Gary. At the time of the 2017 Study, this route had served Wakarusa, which is now served by Barons' Fort Wayne-to-Gary route. The route extends to Columbus, Ohio and Chicago to allow for enhanced connectivity to the intercity bus network. The route provides 32 meaningful connections to the intercity bus network. Annual ridership on this route is approximately 12,800, as evidenced in 2019.

Angola to Gary

Barons initiated the Angola-to-Gary route in August 2019. The carrier operates this route daily offering service to Angola, LaGrange, Shipshewana, Middlebury, South Bend, Burns Harbor, and Gary. The route provides connections beyond the route by extension to Chicago and Cleveland. The route also provides 31 meaningful connections to the national intercity bus network. Approximately 2,000 passengers rode this route for its five months of operation in 2019. Barons anticipates the route will transport approximately 6,000 passengers once the service has recovered from the pandemic. If the schedule allows in the future, Barons Bus would consider expanding to destinations, possibly to Elkhart and Hammond schedule permitting.

As noted above, Barons proposed to INDOT the funding of a new route in 2021 from Indianapolis to Louisville, serving the communities of Franklin, Edinburgh, Columbus, Seymour, and Scottsburg. INDOT denied the funding due to the route's similarity to Miller's Louisville-to-Indianapolis route via Paoli, Orleans, Bedford, Bloomington, and Martinsville. The needs assessment of this study determined that these communities are in need of intercity bus service.

Barons' Section 5311(f)-supported services offer meaningful connections to the following Indiana public transportation providers:

- ◆ Citilink (Fort Wayne)
- ◆ Franklin County Public Transportation
- ◆ Go Express (Bloomington/Indianapolis)
- ◆ INDYGO (Indianapolis)
- ◆ Marion Transit (City of Marion)
- ◆ Roseview Transit (Richmond)
- ◆ Union County Transit
- ◆ Noble County Transit
- ◆ Interurban Trolley (Elkhart County)
- ◆ TRANSPO (South Bend)
- ◆ GPTC (Gary Public Transportation Corp)
- ◆ TransPorte (La Porte)
- ◆ Rose View Transit
- ◆ MCT (Michigan City)
- ◆ NICTD (*Northern Indiana Commuter Transportation District*)

- ◆ STAR Transportation (Fort Wayne)
- ◆ LCAT (LaGrange County Area Transit)

Table 5: Barons Ridership by Route

Route	2017	2018	2019	2020
Liberty – Fort Wayne	22,039	23,288	22,056	13,312
Fort Wayne – Gary	13,657	13,197	12,032	7,495
Richmond – Gary	14,261	14,136	12,818	7,208
Angola – Gary [‡]			2,093	2,914
Total	49,957	50,621	48,999	30,929

The Barons 2021 Section 5311(f) application noted that “The ability to purchase tickets thru multiple outlets, is essential when appealing to the general public. Each customer is unique and offering a wide variety of ticketing options is important to appeal to a wider demographic. Passengers will be able to purchase tickets for our services 8 different ways.”

- ◆ Over the internet
- ◆ Over the phone
- ◆ From Barons Bus ticketing agents
- ◆ Paying cash to the driver
- ◆ Purchasing direct thru any 7-11 Store
- ◆ From any ticketing agent across the country
- ◆ Different online vendors (examples Bus Bud and Wanderu)
- ◆ Kiosks (in near future)

Barons ticket pricing is a mileage-based pricing index as shown in Table 6. There are discounts for advance purchases, groups, students, families, seniors, military personnel, and veterans. Examples of the mileage-based pricing would be \$20 for a ticket from Indianapolis to Fort Wayne or \$15 from Marion to Indianapolis.

Table 7 is a copy of the Barons Bus Quarterly Operating Data Report dated January 20, 2020 that includes the year-end totals for subsidized routes for 2019.

Table 6: Barons Bus Mileage-Based Pricing Index:

Mileage	Cost Per One Way Ticket
0-25	\$5
26-50	\$10
51-100	\$15
101-150	\$20
151-200	\$25

[‡] Angola – Gary route started August 2019

Table 7: Barons Bus Quarterly Operating Data Report, 2019 Year End Totals Dated January 20, 2020

Data Item	Annual Total
Passenger Boardings	48,999
Total Vehicle Miles	640,137
Total Revenue Miles	584,551
Revenue Vehicle Hours	14,702
Gallons of Fuel Used	94,138
Number of Road Calls	1
Passenger Revenue	\$843,402
Total Operating Expense	\$3,167,178

Barons indicated in their 2021 Section 5311(f) application that all vehicles assigned to the Section 5311(f)-supported service are 2015 models or newer, and are equipped with seatbelts, ADA accessibility equipment, wifi, power outlets, electronic driver logs, GPS tracking, and video recording equipment. Barons offers interlining services with Greyhound and operates out of Greyhound facilities in Indianapolis, South Bend, Gary, and Fort Wayne. The Saucon GPS tracking and E-logging system allows Barons to monitor the buses at all times. The system is able to provide an alert to any malfunctions in the vehicle, including loss of tire air pressure, and enables messages to be sent to the driver.

While the 2017 intercity bus study indicated a slight increase in ridership over the 2014 to 2016 period, it appears that ridership peaked in 2016 and then began to level out through 2018. While Barons' Angola-to-Gary route became subsidized 2019, ridership on the remaining three routes declined modestly in 2019, from a high of 50,621 riders in 2018 to 46,906 in 2019. Due to COVID-19, 2020 ridership dropped precipitously as anticipated and by all accounts has continued to suffer in 2021. Barons continues to primarily use ridership and on-time performance as measures of success of its intercity bus services.

Miller Transportation – d/b/a Hoosier Ride

Miller Transportation currently operates the following six routes in Indiana under the Section 5311(f) program:

- ◆ Louisville-Evansville via Corydon, Dale, and Evansville/Airport
- ◆ Indianapolis-Elkhart via Kokomo, Peru, Rochester, Plymouth, and South Bend
- ◆ Indianapolis-Evansville via Martinsville, Bloomington, Spencer, Terre Haute, and Vincennes
- ◆ Indianapolis-Muncie via Pendleton, Anderson, Muncie, Huntington, Fort Wayne and Auburn
- ◆ Louisville-Indianapolis via Paoli, Orleans, Bedford, Bloomington, and Martinsville
- ◆ Fort Wayne - Gary via Warsaw and Merrillville

These routes currently provide service to 27 rural locations in the state plus four urban areas, covering over 745,000 annual miles. The Section 5311(f)-supported service was estimated to provide over 45,000 annual trips in 2021. 10 indicates the ridership on the subsidized Miller routes for the

past four years. The carrier accounts for service to nearly 61 percent of Indiana’s intercity bus stop locations. The map of Miller’s Indiana routes can be found in Exhibit 5.

Miller’s Passenger Call Center, located at the corporate headquarters in Louisville, provides information coverage for the nationwide intercity bus network, including interline service information for Miller and all its interline partners. The carrier utilizes the TRIPS ticketing system. This nationwide point-of-sales electronic ticketing and information system provides real-time, on-line fare and schedule information and ticketing for both Miller and a significant portion of the interline carriers. TRIPS also handles ticketing for personal care assistants for passengers with disabilities.

Miller has indicated that they are in the process of working with other carriers to modernize the ticketing system. The National Bus Ticketing System (NBTS) is a web-based, easy to use ticketing system that has replaced the MAXX ticketing system. Ticket agents will have access to the reservation-based system for seat availability on each Miller schedule, and may print tickets and travel itineraries on regular printer paper. Multiple interline trip tickets will still be reconciled through the National Bus Traffic Association (NBTA).

All Miller motorcoaches, including any Section 5311(f)-funded equipment, are equipped by with the latest technological equipment including wifi, two-way phones for instant direct connection, and global positioning systems, providing real-time vehicle tracking data and reporting. For the benefit of the customers, Miller is implementing a web and mobile-based bus tracker system, allowing customers to track buses and schedules for better planning and communications.

In their 2021 INDOT Section 5311(f) application, Miller indicated that their pricing structure is based on \$0.17 per revenue mile, which the carrier notes is on par with peer intercity bus carriers offering similar service. There are discounts for multi-ride tickets (frequent riders), i.e., 10 percent for 10 rides, 20 percent for 20 rides, and 25 percent for 40-ride purchases. There is also a 25 percent discount on walk-up tickets for students and seniors 65 and over, as well as persons with disabilities. Miller’s mileage-based fare structure is depicted in 8 below.

Table 9 is a copy of the Miller Bus Quarterly Operating Data Report dated January 20, 2020 that includes the year-end totals for subsidized routes for 2019.

Table 8: Miller Interlining Mileage-Based Fare Structure

Mileage	Cost Per One-Way Ticket
0-10	\$12
11-20	\$13
21-30	\$15
31 - 40	\$17
41 - 50	\$19
51 - 60	\$22
61 - 70	\$25
71 - 80	\$27
81 - 90	\$31
91 - 100	\$35

Table 9: Miller Transportation Quarterly Operating Data Report, February 3, 2020, 2019 Year End Totals

Data Item	Annual Total
Passenger Boardings	37,827
Total Vehicle Miles	684,500
Total Revenue Miles	655,540
Revenue Vehicle Hours	14,842
Gallons of Fuel Used	136,899
Number of Road Calls	64
Passenger Revenue	\$990,291
Total Operating Expense	\$2,601,101

Ridership on Miller’s Indiana routes for the 2017 to 2020 period is depicted in Table 10. The previous study noted that ridership on the Miller routes had declined substantially from 2015 to 2016, but 2017 saw the carrier’s ridership grow to well beyond the previous 2015 level to over 54,500 passengers. Total passengers remained level through 2018, but declined by over 9,600 riders in 2019. Consistent with the national trend due to the pandemic, Miller’s 2020 ridership dropped by 42 percent and has continued to decline in 2021.

Table 10: Miller Ridership by Route

Route	2017	2018	2019	2020
Louisville - Evansville	10,261	7,159	7,494	4,160
Indianapolis - Elkhart	8,632	8,980	6,473	3,871
Indianapolis - Evansville	11,510	12,685	10,184	6,216
Indianapolis - Muncie	4,148	5,010	3,391	1,628
Louisville - Indianapolis	15,465	15,770	12,939	7,607
Fort Wayne - Gary	4,608	4,339	3,856	2,326
Total	54,624	53,943	44,337	25,808

Louisville to Evansville

This southern Indiana route serves Corydon, Dale, Evansville Airport, and Evansville, with extended service to Memphis. The route traverses about 88,000 annual miles in Indiana. A total of 50 connections are available along the route. The route provided approximately 7,500 passenger trip in 2019.

Indianapolis to Elkhart

This Miller route offers daily service to Indianapolis, Kokomo, Peru, Rochester, Plymouth, South Bend and Elkhart, with extended service to Detroit. The route, consuming over 121,000 annual miles in Indiana, provides for approximately 85 possible connections (round trip) to the country’s intercity bus network. Based on reported 2019 ridership, the route provides approximately 6,500 passenger trips per year.

Indianapolis to Evansville

Daily service is provided on this route that serves Indianapolis, Martinsville, Bloomington, Spencer, Terre Haute, Vincennes, and Evansville. Since the 2017 Study, the communities of Princeton and Washington lost service on this route. The service operates along a route of 156 miles through Indiana, consuming over 166,000 annual miles and providing 48 connections to destinations across the country. Approximately 10,200 passengers are transported on this route annually when not impacted by the pandemic.

Indianapolis to Muncie

This daily route serves Indianapolis, Indianapolis International Airport, Pendleton, Anderson, Ball State University, Muncie, Huntington, Fort Wayne, and Auburn. Huntington and Auburn are added stops since the 2017 Study. The route operates over 215,000 annual Indiana and offers over 140 connections at stops along the route. Annual ridership on the route totaled about 3,400 passengers in 2019.

Louisville to Indianapolis

This route, which provides over 104,000 miles of service annually in the state, serves Paoli, Orleans, Bedford, Bloomington, Martinsville, and Indianapolis. Paoli and Orleans are added stops since 2017; Hammond, Lafayette and Merrillville have since lost service along the route. There are approximately 100 connections available along the route to the intercity bus network. The route produced about 13,000 riders in 2019.

Fort Wayne to Gary

Miller operates this daily route that serves the Indiana communities of Richmond, Fort Wayne, Warsaw, Merrillville, and Gary. Merrillville and Warsaw are added stops on this route since the previous study, while Elkhart and South Bend have lost service. This route was operated unsubsidized until 2017, when Miller began to receive Section 5311(f) funds to operate the route. The route covers over 164,000 annual miles in the state, providing approximately 100 connections to the national network. Approximately 3,900 passenger trips were provided on this route in 2019.

Miller's Section 5311(f)-supported services offer meaningful connections to the following Indiana public transportation providers:

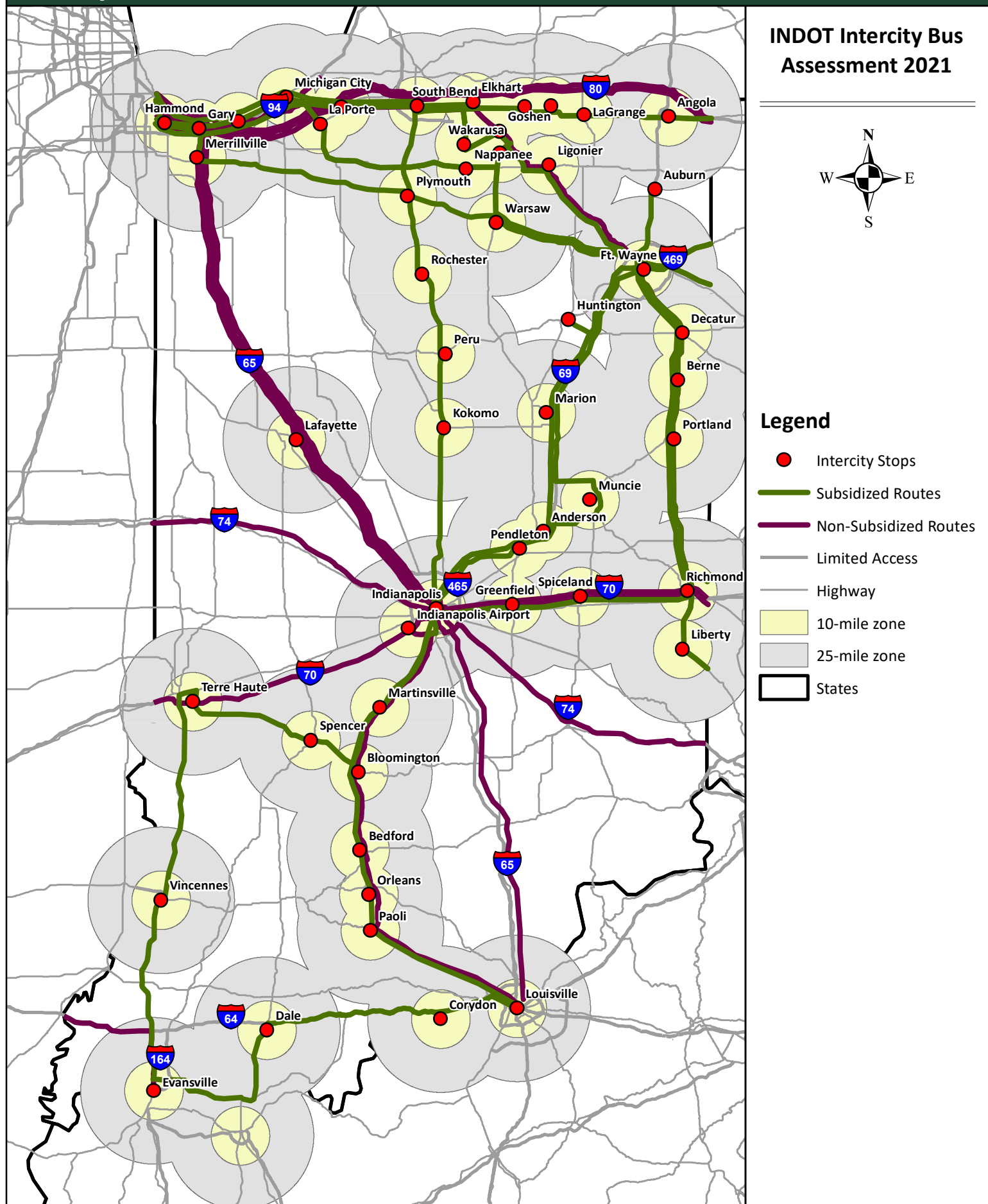
- ◆ Metropolitan Evansville Transit (Evansville)
- ◆ Bloomington Transit (Bloomington)
- ◆ Terre Haute Transit (Terre Haute)
- ◆ Citilink (Fort Wayne)
- ◆ CityBus (Lafayette)
- ◆ Transpo (South Bend)
- ◆ Roseview Transit (Richmond)
- ◆ MITS (Muncie)
- ◆ City of Anderson Transit (Anderson)
- ◆ VanGo (Vincennes)
- ◆ TASC (Bedford)
- ◆ Orange County Transit (Orleans, Paoli)

- ◆ Interurban Trolley (Elkhart)
- ◆ Gary Public Transit (Gary, Hammond)
- ◆ IndyGo (Indianapolis)
- ◆ TRAM (Anderson, Pendleton)
- ◆ Morgan County CONNECT (Martinsville)

The data analysis of areas and population served by Indiana's intercity bus network determined that the state is well served with 46 percent of the population residing within ten miles of an intercity bus stop. The percentage increases to nearly 84 percent when a 25-mile radius is used for the coverage analysis.

The Section 5311(f)-supported services play a pivotal role in the intercity bus coverage. Without the Barons and Miller Section 5311(f)-supported service, the state's population within 25 miles of existing stops is nearly 61 percent, and the population within 10 miles of existing stops is about 33 percent.

Exhibit 8: Existing Intercity Bus Routes & Stops



CARES Act Financial Assistance

Congress enacted, and the President signed on March 27, 2020 the Coronavirus Aid, Relief, and Economic Security (CARES) Act into law. The CARES Act provided \$25 billion in funding for FTA transit programs to assist public transportation agencies in responding to the public health emergency presented by COVID-19. This funding is split between administering the program, Section 5307, and Section 5311. Beginning January 20, 2020, all activities normally eligible under the Section 5307 and 5311 programs became eligible for CARES Act funding, including planning, capital, and operating expenses. All projects funded by the CARES Act are eligible for 100 percent federal share.

FTA apportioned \$93.5 million in Section 5311 CARES Act funds to INDOT, including \$14,023,650 for the Section 5311(f) Intercity Bus Program. The Section 5311 intercity bus requirements apply to the CARES Act funds, in that states must use 15 percent of the funding for intercity bus unless the Governor certifies that the state's intercity bus needs are adequately met. Table 11 below indicates the total CARES Act funds received by Barons, Miller, Greyhound, and Burlington Trailways from the funds allocated to INDOT. INDOT also used CARES Act funds for 2021 intercity bus operating contracts.

Table 11: CARES Act Funds Received from INDOT Allocation

Operator	Funding
Barons	\$1,873,263
Miller	\$2,289,544
Greyhound	\$3,737,835
Burlington	\$424,971
Total	\$8,325,613

Chapter 5 Consultation and Stakeholder Input

Overview

States intending to submit a complete or partial governor's certification must undertake a consultation process at least every four years with the state's intercity bus providers prior to issuing the certification. While Indiana has continually obligated the required 15 percent and has not sought to submit a full or partial governor's certification, INDOT has included a consultation process as one element of this update of its intercity bus study in order to ensure that the program is addressing unmet intercity bus needs and has received input from various stakeholder groups.

FTA has adopted the definition of "consultation" as "one party confers with another identified party in accordance with an established process and, before taking action(s), considers that party's views and periodically informs that party about action(s) taken." While FTA provides discretion to the states to determine the process for meeting this consultation requirement, the state's intercity consultation process should include the following elements as identified in FTA Circular 9040.1G:

- ◆ Identification of intercity bus providers in the state;
- ◆ An opportunity for intercity bus providers to submit proposals for funding as part of the state's distribution of its annual Section 5311(f) apportionment; and
- ◆ A direct correlation between the results of the consultation process and a determination that the state's intercity service needs are adequately being met.

To carry out the consultation process, FTA recommends the following activities:

- ◆ Inform intercity bus carriers of the state's rural planning process and encourage their participation in that process, and when a state is considering possible certification, provide an opportunity to submit comments and/or request a public meeting to identify unmet needs and discuss proposals for meeting those needs;
- ◆ Include intercity providers' participation in scheduled meetings, such as state agency transit meetings and public transit conferences;
- ◆ Meet with individual intercity providers periodically;
- ◆ Notify providers either through direct mail or advertise in various locations around the state of availability of funds for the current year's intercity bus program;
- ◆ Inform intercity bus providers about the development of the locally developed, coordinated public transit-human services transportation plans and encourage their participation; and
- ◆ Solicit comments through direct mail and advertise in newspapers in various locations around the state of the state's intent to submit a "Governor's certification" to FTA unless intercity bus needs are identified.

An important element of this study's assessment of intercity bus needs and determination of the most advantageous use of INDOT's Section 5311(f) allocation is receiving input from its stakeholders. Survey instruments were developed for three distinct stakeholder groups: intercity bus carriers operating in the state, the state's public transportation providers, and general stakeholders including

local and regional planners, economic development representatives, and local government officials. The survey instruments can be found in Appendix A of this study.

The surveys were offered through SurveyMonkey, an online survey provider. Stakeholders were provided approximately three weeks to submit their survey responses. This section contains the results from the three surveys.

Four (4) responses were received from intercity bus carriers: Barons Bus, Burlington Trailways, Greyhound, and Miller Transportation. The state's public transit providers returned 39 survey responses, while 17 completed surveys were returned from general stakeholders. The relatively poor response from the general stakeholders is likely due to their disconnection from intercity bus service.

Consistent with the survey responses from the 2017 Study, respondents confused intercity bus service with fixed route public transportation provided within an urban area, such as Indianapolis or Bloomington. Some responses indicated that stakeholders are not aware of intercity bus service currently operating in their area of the state.

Intercity Bus Carriers

Barons Bus, Burlington Trailways, Greyhound, and Miller Transportation, Inc. responded to the survey.

How information is disseminated to riders is important part of intercity bus service. Respondents were asked how they inform the public of their intercity bus services. *Miller Transportation* has a website, posts their schedules at bus stations, and offers print media when requested. *Burlington Trailways* posts information to its website and social media accounts. They also engage with the public through telephone assistance, and can be send information via email or physical mail. *Barons Bus* also has a website, and uses brochures, posted schedules, and local media. It uses its social media platforms to provide information to public. *Greyhound's* brand recognition results in several million visitors to their website each month, where all relevant rider information can be found. Along with their own website, *Barons Bus* uses Greyhound, Wanderu, BusBud, and Google Maps for their schedules.

When asked how COVID-19 has impacted their service, none of the respondents indicated any route terminations, temporary or permanent, related to COVID-19. The decline in ridership and subsequent drop in revenue resulted in Greyhound reducing frequencies on many routes. One carrier suggested that more intense marketing will need to take place once the pandemic subsides. Passengers will need to feel comfortable and safe while riding all forms of transit in order to use the services again.

Intercity bus carriers were asked to describe any other services they operate, such as connections with airports or Amtrak stations in Indiana. *Miller Transportation* offers services to airports in Evansville and Indianapolis while also offering thruway service (in cooperation with Greyhound) to Lafayette, South Bend, Elkhart, and Fort Wayne. *Burlington Trailways* provides charter services to the Indianapolis Amtrak station, as needed.

Intercity bus carriers were then asked to describe their connections with local public transportation providers in Indiana. *Miller Transportation* partners with transit agencies to sell tickets and operates out of transit centers in Bloomington, Columbus, Indiana(2021), Evansville, Fort Wayne, Gary,

Lafayette, Muncie, South Bend, and Terre Haute. *Barons Bus* stops at least two transit centers: Fort Wayne and South Bend. *Burlington Trailways* noted that Indianapolis is their eastern most scheduled route service stop. *Burlington Trailways* is a bridge carrier; meaning that they rely on meaningful connections at the end of routes. These meaningful connections allow passengers to travel nationwide. In Indianapolis, for example, Burlington connects with Greyhound, Miller Transportation, and Barons Bus.

Burlington Trailways identified the staffing shortage at the Indianapolis station as a deficiency in their connection with public transportation providers in Indiana. Greyhound noted that the carrier has a standardized interline (thru ticketing/passenger sharing) agreement with dozens of transit operators around the nation, however *there are no such agreements in Indiana*. *Greyhound* indicated that where possible, the carrier would support better coordination between transit and intercity bus, including formal interline arrangements. *Greyhound* would be interested in coordinating/interlining with transit agencies that have existing fixed route services, serving rural communities that the company currently does not serve.

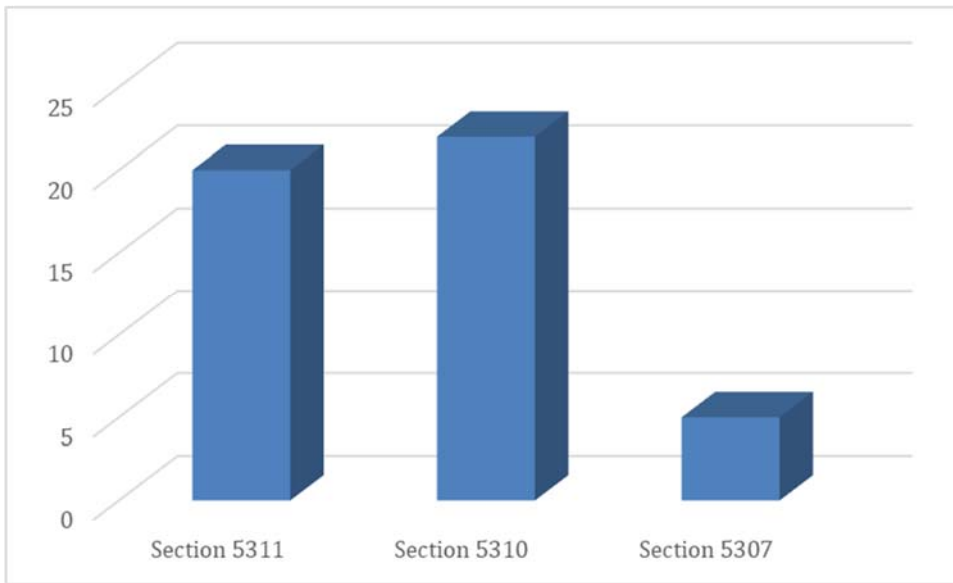
The carriers were asked to identify specific areas or corridors in Indiana by route origin/destination pairs where there is a need for service or improvement to existing intercity bus service. Below are the carriers' responses:

- ◆ Columbus, Indiana to Indianapolis
- ◆ Northwestern Indiana to the Chicago airports
- ◆ Logansport, Indiana to Indianapolis-Chicago
- ◆ Indianapolis to Southern Indiana into Louisville
- ◆ College Connector: Bloomington-Indianapolis to Lafayette to South Bend
- ◆ Chicago to Indianapolis along Northwest border
- ◆ Indianapolis to Louisville, making stop along 65 or thru 421
- ◆ Indianapolis-Lafayette-Rensselaer-Dyer-Chicago
- ◆ Indianapolis-Kokomo-Logansport-Valparaiso-Chicago
- ◆ Evansville-Oakland City-Washington-Montgomery-Indianapolis

Public Transportation Providers

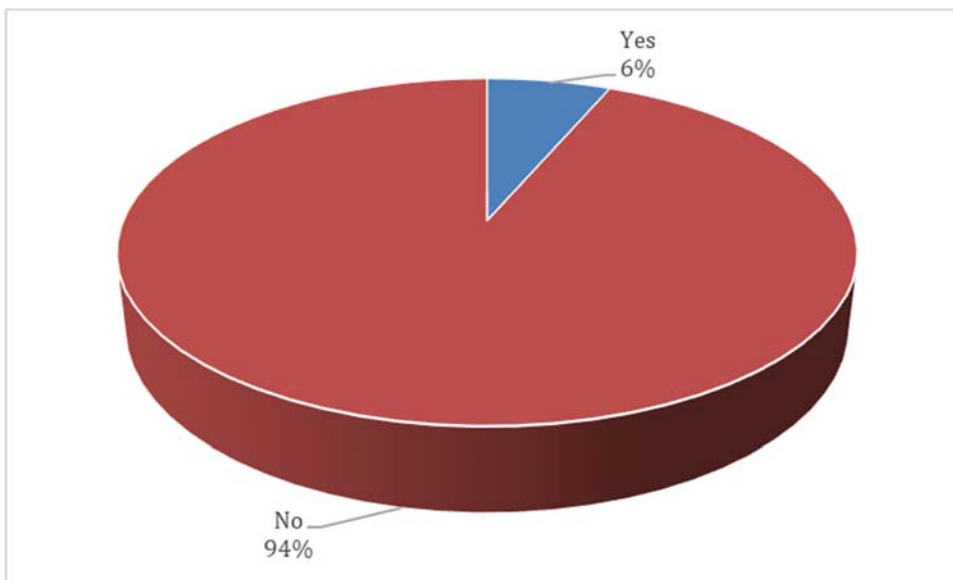
The public transportation providers survey was sent to 155 different contacts. Thirty-nine (39) providers responded, 20 of which receive Section 5311 funding, 22 receive Section 5310 funding, and five receive Section 5307 funding.

Exhibit 9: Responding Public Transportation Providers, by Funding



Public transportation providers were asked if their public transportation and/or intercity bus service was in threat of being terminated due to lack of ridership. **Only 6 percent or two respondents indicated they thought their service could be terminated.** One indicated they had no public transportation in their county and the other indicated their intercity stop may be terminated.

Exhibit 10: Percent of Respondents Believing Service Could Be Terminated



In order to allow connections between local public transportation and intercity bus service, respondents were asked to indicate any intermodal facilities that were needed. The METS pickup point at Posey and Vanderburgh County line, Lawrenceburg, Batesville, Greensburg, Madison, and the I-69 and SR 18 interchange were locations mentioned by respondents.

Public transportation providers were then asked to prioritize their greatest unmet public transportation needs in their area.

Priority 1

- ◆ Capacity
- ◆ Increased hours of service for all transportation modes
- ◆ Non-Medicaid intercity services mainly from Area 7 to Indianapolis.
- ◆ Sunday service
- ◆ Medical transport non-Medicare and Medicare
- ◆ Bartholomew County — a rural transportation provider
- ◆ Stretcher services other than ambulance service
- ◆ Bus stops
- ◆ Services after daytime routes for local transit services for those who work or want to be out during later afternoon/evening
- ◆ NOT ENOUGH MONEY
- ◆ Airport service to Chicago
- ◆ Adults 18-59
- ◆ Transportation to work
- ◆ Southeast Indiana to Northern Kentucky
- ◆ Public transportation availability on evenings and weekends
- ◆ Additional routes
- ◆ Early morning transportation
- ◆ Weekend service
- ◆ Weekend service and 24-hour service
- ◆ Grant County IN

Priority 2

- ◆ Hours of service
- ◆ Increase frequency on fixed and deviated fixed routes
- ◆ Improved frequency
- ◆ Bus and or taxi service
- ◆ Fixed routes
- ◆ NOT ENOUGH DRIVERS
- ◆ Transportation to college
- ◆ Southeast Indiana to Cincinnati
- ◆ Additional availability from county to county
- ◆ More buses
- ◆ Weekend transportation
- ◆ Evening service

Priority 3

- ◆ Availability of drivers
- ◆ Employment connectors to industrial parks

- ◆ Expanded geographic coverage
- ◆ Southeast Indiana to Indianapolis
- ◆ Regularly scheduled routes (most are pre-arranged trips)
- ◆ Evening transportation
- ◆ More frequent service

Priorities 4-10

- ◆ Connect with Columbus Transit/Bartholomew County
- ◆ Southeast Indiana to Louisville
- ◆ Weekend services
- ◆ Evening services

Respondents were asked to identify county/regional entities that would benefit from being included in the discussion of intercity bus service in their area.

- ◆ A local TAC has been coordinated with other agencies needing transit services. This committee includes other social service agencies, city and county government officials, agency board members, etc. (Wells County)
- ◆ Adams County
- ◆ Allen County
- ◆ Anderson-Muncie Public Transportation Coalition
- ◆ Bartholomew County
- ◆ BATS (Boone Area Transit System)
- ◆ Blackford County
- ◆ Boone Economic Development Corporation
- ◆ Our local chambers (Boone County)
- ◆ CIRT (Central Indiana Regional Transportation Authority)
- ◆ City of Dale
- ◆ City of Muncie
- ◆ City of Plymouth
- ◆ City of Rockport
- ◆ Rockport Housing Authority
- ◆ City of Santa Claus
- ◆ Clay County
- ◆ Dearborn County
- ◆ Decatur County
- ◆ Local government authorities (DeKalb County)
- ◆ Dekalb County
- ◆ Delaware county
- ◆ Elkhart
- ◆ FSSA (Family and Social Services Administration)
- ◆ IndyGo
- ◆ Jefferson County
- ◆ LaGrange County

- ◆ Life Streams
- ◆ MACOG (Michiana Area Council of Governments)
- ◆ Marion VA hospital
- ◆ Marshall County Commissioners
- ◆ Marshall County Stellar Initiative Committee
- ◆ MCEDC (Marshall County Economic Development Corporation)
- ◆ METS (Metropolitan Evansville Transit System)
- ◆ Monroe County
- ◆ Noble County
- ◆ Northwest Indiana
- ◆ Parke County
- ◆ Posey County
- ◆ Putnam County
- ◆ Ripley County
- ◆ Spencer County Chamber of Commerce
- ◆ St. Joseph COA
- ◆ St. Joseph County
- ◆ Steuben County
- ◆ Sullivan County
- ◆ Vanderburgh County
- ◆ Vermillion County
- ◆ Vigo County

The final question asked to public transportation providers was to provide any other comments as it relates to public transportation and intercity bus in their area.

- ◆ The primary driving force to a feeder service is demand. Our county does not have a demand for transportation to other areas except for medical trips. We provide medical trips to other counties, within a 50-mile radius of our county on Tuesdays and Thursdays. (Wells County)
- ◆ Before the pandemic we averaged 40–45 trip denials per month (now down to about 5). Fixed route services and feeder service would help increase availability & lower costs, if and when demand increases back to normal. (Marshall County Council on Aging)
- ◆ A Barons Bus stop is across the street but we have no idea where they go, etc. Nobody has ever talked to us about their service. (LaGrange County Council on Aging)
- ◆ We would love to have public transportation (Adams County)

Feeder Service

While thirty-six of the 39 respondents indicated that they do not operate intercity or feeder services, the following three agencies noted that they do provide such services:

- ◆ Muncie Indiana Transit System
- ◆ Bloomington Public Transportation Corp
- ◆ City of Valparaiso

All of the providers who indicated they have feeder service provide fixed/flex route service to their transit center or station that is also the location of an intercity bus stop. One of the providers, Valparaiso, also provides feeder service to Dune Park train station. The main purpose for these feeder trips were education, work, and shopping.

The three providers with feeder routes were then asked how COVID-19 has impacted this service. Reduced service, major loss in ridership, and loss of fare revenue were all cited.

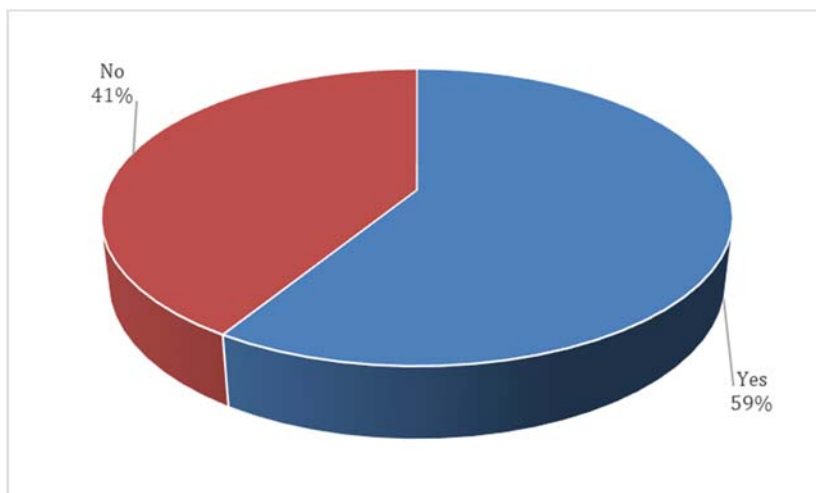
Only one of the operators of feeder service indicated the unmet demand for intercity service. The City of Valparaiso reported the need for connections with other cities, townships, and hospitals within Porter County.

The three providers of feeder service mentioned the following destination pairs that would benefit from improvement in service: Bloomington to Indianapolis, Bloomington to Evansville, Bloomington to Evansville, and Valparaiso to Chicago.

General Stakeholders

Approximately 59 percent of those responding to the general stakeholder survey indicated that there are intercity bus needs in their area that are not being met.

Exhibit 11: Respondents Indicating Unmet Intercity Bus Needs



Those who responded yes were then asked to identify their top three areas of need by origin and destination pair. Despite an effort to define intercity bus service in the survey instrument, it appears that stakeholders might not have a full understanding intercity bus service and possibly not aware of its availability based on identified areas of need.

- ◆ Greyhound in Seymour & return in the same day
- ◆ Gary-Valparaiso
- ◆ Greencastle to Plainfield for workforce commuting
- ◆ Muncie-Indianapolis

- ◆ Huntingburg-Jasper-Loogootee-Crane
- ◆ Speedway to/from Indianapolis
- ◆ Bloomington to Spencer
- ◆ Downtown Batesville to Kroger across I-74
- ◆ Seymour to Columbus
- ◆ Gary-Michigan City
- ◆ Greencastle to Indianapolis Airport for DePauw University students
- ◆ Tell City-Jasper
- ◆ Bloomington to Crane Defense Facility @ various gates
- ◆ Seymour to Indianapolis
- ◆ Michigan City-Valparaiso
- ◆ Greencastle to downtown Indianapolis for workforce commuting
- ◆ Evansville-Huntingburg-Jasper-French Lick
- ◆ Bloomington to Indianapolis

After indicating needs for intercity service in their area, respondents were then asked to prioritize a list of unmet public transportation needs in their area.

Priority 1

- ◆ There is no bus service in the county (Seymour)
- ◆ Lack of connectivity across our entire region (NIRPC)
- ◆ Workforce commuting within Putnam County (Greencastle)
- ◆ Small town no bus service needed (Corydon)
- ◆ Jasper/Evansville (Jasper)
- ◆ We now pay much greater income taxes for IndyGo Red Line Services, but get no benefit (Speedway)
- ◆ Fast service between Evansville, Newburgh, Posey, and other points in Warrick Counties (Vanderburgh County)
- ◆ Rural public transit access to Bloomington for those who are transit dependent (Bloomington-Monroe County MPO)
- ◆ Downtown to Kroger located across I-74 (Batesville)
- ◆ Last mile transportation after the Southlake Extension is complete (Munster)

Priority 2

- ◆ Infrequency of service (NIRPC)
- ◆ Workforce commuting to Hendricks and Marion Counties. In 2018, 1,471 residents commuted to Hendrick; 1,967 to Marion (Greencastle)
- ◆ Southern Indiana Transit carries passengers needing help such as the disabled (Corydon)
- ◆ Jasper/Bloomington (Jasper)
- ◆ We get no site-to-site service within our town, only to/from Indianapolis (Speedway)
- ◆ Safety funds for all transit operators given the COVID-19 pandemic (Bloomington-Monroe MPO)
- ◆ Bus service to local manufacturing workplaces (Batesville)

Priority 3

- ◆ Need for consolidation of duplicate demand-response systems (NIRPC)
- ◆ Flag stop along I-70 in Cloverdale for intercity routes (Greencastle)
- ◆ Jasper/Indianapolis (Jasper)
- ◆ Transit operating/capital assistance given the COVID-19 pandemic (Bloomington-Monroe MPO)

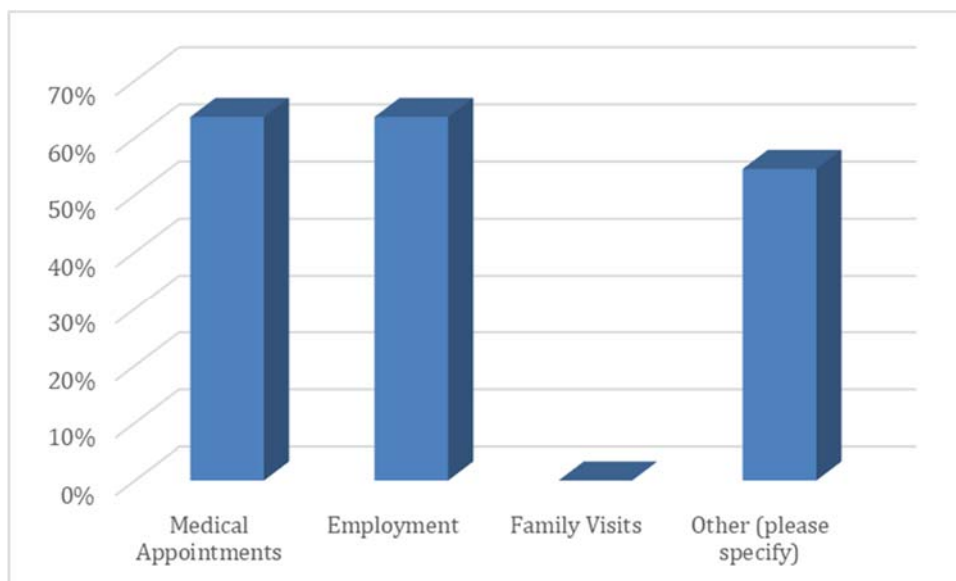
Priorities 4–6

- ◆ Need for last-mile connection to commuter rail stations (NIRPC)
- ◆ Scarcity of local funding to match federal dollars (NIRPC)
- ◆ Distrust among operators (NIRPC)
- ◆ Jasper/Vincennes (Jasper)
- ◆ Bloomington/Louisville (Jasper)
- ◆ Evansville/Cincinnati (Jasper)
- ◆ Shelter/location access needs given a comprehensive Transit Stop Inventory Assessment conducted for INDOT (Bloomington-Monroe MPO)

Eighty-six (86) percent of general stakeholder respondents stated they did not see a need for intermodal passenger facilities in their area. Fourteen (14) percent (two respondents) stated they did see a need, with NIRPC stating they would need facilities around the rail stations, while the City of Greencastle stated they would need a parking lot or drop off location.

General stakeholders were asked to pick which trip purpose are most intercity passengers taking in their area. Respondents chose ‘medical’ and ‘employment’ at 64 percent each while ‘other’ was chosen 55 percent. Those who chose ‘other’ listed shopping, education, and entertainment.

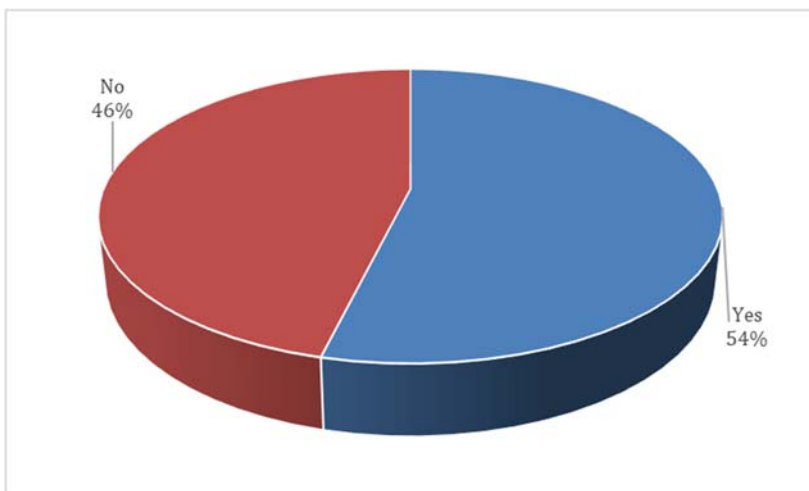
Exhibit 12: Percent of Respondents Indicating Trip Purpose



The survey asked respondents to indicate the value of intercity bus service operating in their area, and for those areas without intercity bus service, the perceived value of such service if it was initiated. The survey provided options of 'not important,' 'somewhat important,' 'important,' and 'very important'. Responses indicated an average response of 'somewhat important' for both categories.

The survey then asked if respondents would support the use of federal funds and state dollars to fund the operating of intercity bus service in their area. Fifty-four (54) percent said they would, while 46 percent said they would not support funding of intercity bus service in their area.

Exhibit 13: Respondents Supporting Use of Federal and State Funds



The last question allowed respondents to expand on any other comments as it related to intercity bus needs in their area.

- ◆ Our region attempted to create a regional bus authority in 2000–2012. It folded primarily due to lack of local funding support. This is the major nut to crack in providing intercity operability: how do you share costs across the entire service area, and obtain the local funding to begin with? (NIRPC)
- ◆ There is a need by DePauw University, especially students; however, that need is somewhat seasonal in that it would be tied to various breaks in the academic calendar. As noted above, there is both an opportunity and need for workforce commuting. (Greencastle)
- ◆ Small town that does have a bus service for people needing to get to Dr's and other services at no cost or very little cost. (Corydon)
- ◆ Rural community economic centers, retail, restaurants, entertainment, parks (Jasper)
- ◆ We would prefer to implement our own local (within our own town) shuttle service with the taxes paid instead of giving them to IndyGo and getting only pick up/drop off service on infrequent bus lines. (Speedway)

Chapter 6 Data Analysis

This chapter serves as an analysis of Indiana demographic data and how it impacts the demand for intercity bus transportation in the state. The analysis addresses to what extent the Indiana's existing network meets the demand for intercity bus travel. It identifies the more transit-dependent segments of the population and determines the areas of greatest need for intercity bus travel based on the density and percentage of these population groups. This analysis also identifies of the major intercity bus trip generators and the evaluation of intercity bus service coverage with respect to these trip generators. According to research conducted by the Transit Cooperative Research Program (TCRP), these major trip generators include colleges and universities, correctional institutions, medical facilities, commercial airports, and military bases. Potential origin areas of high need and potential destinations are mapped with existing intercity bus network, with the analysis determining key intercity connections and gaps in service.

Included in this analysis are mapped visuals of areas and populations that are beyond both a 10-mile and 25-mile radius of an intercity bus station or stop. Based on work by the Bureau of Transportation Statistics and the Office of U.S. Secretary of Transportation, a reasonable coverage radius around an intercity bus station is defined as 25 miles. This is the commonly used standard in the intercity bus industry. The 10-mile radius raises the bar while providing another level to measure the coverage of the state's intercity bus network.

In 2017, there were 18 intercity bus routes operating in the state: four by Greyhound, one by Burlington Trailways, one by Indian Trails, one by Megabus, three by Barons, and eight by Miller. Eight of these routes were subsidized. These 18 routes served 46 communities across the state. There were two additional stops in Indianapolis and Muncie, at the Indianapolis International Airport and Ball State University, respectively, for a total of 48 stops in 2017.

Today, there are a total of 24 intercity bus routes operating in the state: four by Greyhound, one by Burlington Trailways, one by Indian Trails, one by Megabus, four by Barons, nine by Miller, one by D&J Bus, one by FlixBus, and two by Wanda Coach. Ten of these routes are subsidized with Section 5311(f) funds. These 24 routes serve the cities/towns noted in Table 12, which also indicates the carrier(s) serving those cities/towns. Amtrak stops are also listed on the table.

Note that there is an additional stop by Miller at the Evansville Airport. Owensboro, Princeton, and Washington are the only stations or stops operating in 2017 that are not served now. These were previously stops on Miller routes. However, there have been added stops since the last study in Angola, LaGrange, Middlebury, and Shipshewana, which are served by Barons, and Spiceland which is served by Wanda Coach. With a net increase of five routes and four additional served stations or stops, Indiana has realized an unanticipated increase in intercity bus service since 2017.

In 2009, there were 48 cities in the state with a population of over 10,000 persons without ICB service. The number of cities in this category had been reduced to 25 by 2017. In 2021, Indiana has 78 cities whose population exceeds 10,000, but only 13 are beyond 25 miles from an intercity bus station/home. This is a good example of how Section 5311(f) assistance has positively impacted the state's intercity bus coverage.

The availability of Section 5311(f) funds has led to the increased level of intercity bus service in the state, as represented by the funds being used to support Barons Bus' four routes and the six routes operated by Miller. Both Barons Bus and Miller take advantage of the in-kind local match provision in the Section 5311(f) program. This local match provision incentivizes the carriers to provide additional intercity bus service. It should be noted that Miller has continued to operate three unsubsidized routes in Indiana.

Table 12: Indiana Cities with Intercity Bus Station/Stop

CITY/TOWN	CARRIER(S)
Anderson	Miller
Angola	Barons
Bedford	Miller
Berne	Barons
Bloomington	Miller
Burns Harbor	Barons
Corydon	Miller
Dale	Miller
Decatur	Barons
Elkhart	Miller
Evansville	Greyhound, Miller
Evansville Airport	Miller
Fort Wayne	Barons, Miller
Gary	Barons, Greyhound, Indian Trails, Miller, D&J
Goshen	Barons
Greenfield	Barons, Wanda Coach
Hammond	Miller
Indianapolis	Barons, Burlington Trailways, Greyhound, Megabus, Miller, Wanda Coach, FlixBus
Indianapolis Airport	Barons, FlixBus, Greyhound, Miller
Kokomo	Miller
LaGrange	Barons
La Porte	Barons
Lafayette	Greyhound, Miller, FlixBus
Liberty	Barons
Ligonier	Barons
Marion	Barons
Martinsville	Miller
Merrillville	Miller
Michigan City	Barons
Middlebury	Barons
Muncie	Miller
Ball State University	Miller
Nappanee	Barons
New Paris	Barons
Orleans	Miller
Paoli	Miller
Pendleton	Miller
Peru	Miller
Plymouth	Miller

CITY/TOWN	CARRIER(S)
Portland	Barons
Richmond	Barons, Miller, Wanda Coach
Rochester	Miller
Rolling Prairie	Barons
Shipshewana	Barons
South Bend	Barons, Greyhound, Miller, D&J
Spencer	Miller
Spiceland	Wanda Coach
Terre Haute	Greyhound, Miller
Vincennes	Miller
Wakarusa	Barons
Warsaw	Miller

Identification of Intercity Bus Corridors and Populations Served

There are segments of the population that are more likely to be more dependent on intercity bus service. There are also segments of the population that have been traditionally underserved by transportation systems. Certain population segments may be more dependent due to characteristics such as income, age, and households without an automobile. The need for any type of transit service, including intercity bus service, depends upon the size and distribution of an area's population and on the demographic and economic characteristics of that population. These demographic and economic characteristics are estimated by the U.S. Census Bureau's American Community Survey program.

- ◆ Young adults (persons 18 to 34): enlisted military personnel, college students, and other young adults often do not have access to an automobile. **Research suggests that individuals in this age range make up the bulk of intercity bus ridership.**
- ◆ Elderly (persons 65 and above): advancing age can mean diminished ability or desire to drive (particularly on a long trip) and a need for access to medical facilities on a regular basis.
- ◆ Persons living below poverty: persons that typically lack the economic means to own or operate a vehicle, or a vehicle perceived as capable of a long trip.
- ◆ Auto-less households: persons without access to a car must rely on alternative transportation.

The 2019 Indiana population estimates indicate that 16.1 percent of the population is age 65 or above, while 11.9 percent live in poverty, and 9.7 percent below the age of 65 are disabled. These are the segments of the population for which public transportation and intercity bus service are of such importance.

Exhibit 14 is a map depicting the state's population. For the entire state, 84 percent of the population lives within 25 miles of an intercity bus station or stop, while 46 percent of the population resides within 10 miles of a station or stop. The 2017 Study found that 87 percent of the Indiana population was residing within 25 miles of a stop.

The largest concentration of population greater than 25 miles from an intercity bus station or stop is located east and west of I-65 between Indianapolis and Louisville. The areas north and south of

Lafayette and south of Vincennes along US 41 also have many people residing more than 25 miles from an intercity bus station or stop. In the larger urban areas, there is often a significant volume of population residing greater than 10 but less than 25 miles from an intercity bus station or stop.

Exhibit 14: High Total Population Block Groups

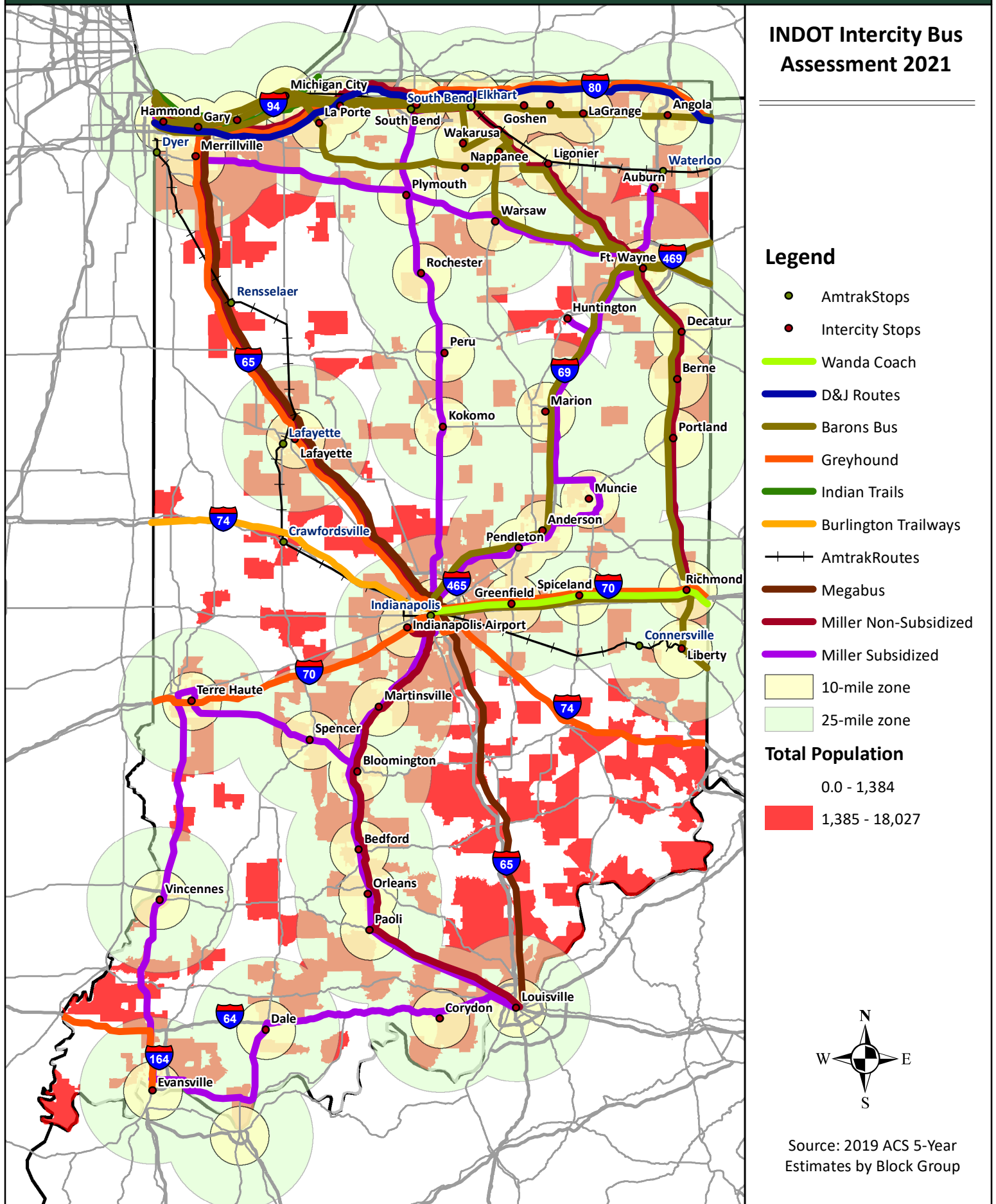


Exhibit 15 illustrates the areas of Indiana with the highest percentage of minority population. Minority populations, which the American Public Transportation Association (APTA) estimate to be 60 percent of the country's public transportation ridership, have been underserved by transportation systems in the U.S. for decades, so it is important to ensure these populations get equitable access. With the exception of the areas north of Lafayette and south of Indianapolis along I-65, the higher concentrations of minority population are located in or near urban areas and within 10 miles of an intercity bus station or stop.

Exhibit 16 depicts the areas of the state with higher percentages of households living below the poverty level. This demographic characteristic mirrors the state population as a whole. The largest concentration of households below the poverty level that are greater than 25 miles from an intercity bus station or stop is located east and west of I-65 between Indianapolis and Louisville and north of Indianapolis to just south of Merrillville. Most of the larger urban areas have a concentration of persons living below the poverty level that are greater than 10 miles but less than 25 miles from an intercity bus station or stop.

Exhibit 17 illustrates the areas of Indiana that have the largest concentration of households without an automobile. The areas along I-65 west of Lafayette down to Terre Haute and east of Vincennes have the largest concentration of such households living greater than 25 miles from an intercity bus station/stop.

Exhibit 15: High Percentage of Minority Population

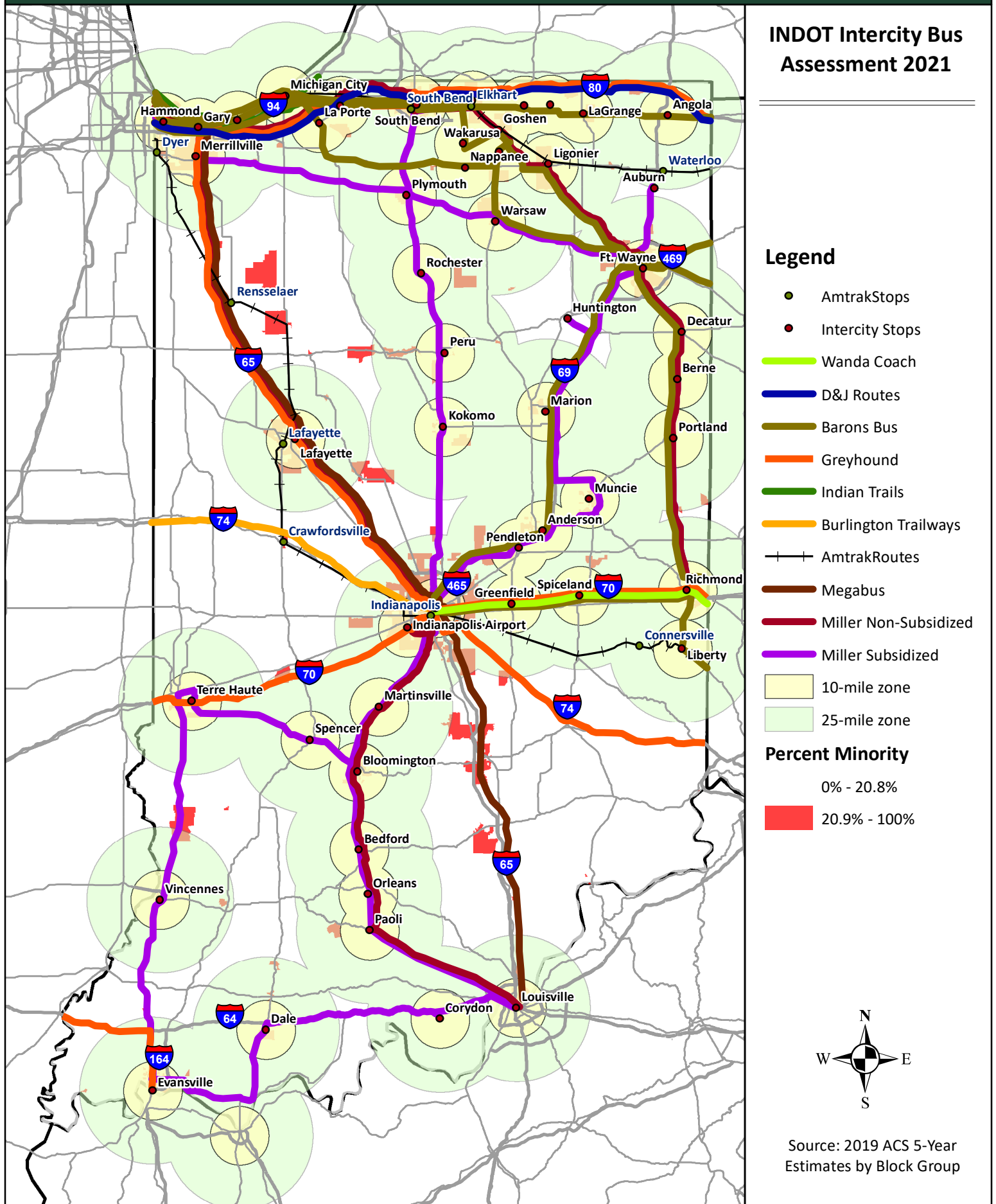


Exhibit 16: High Percentages of Households Below Poverty

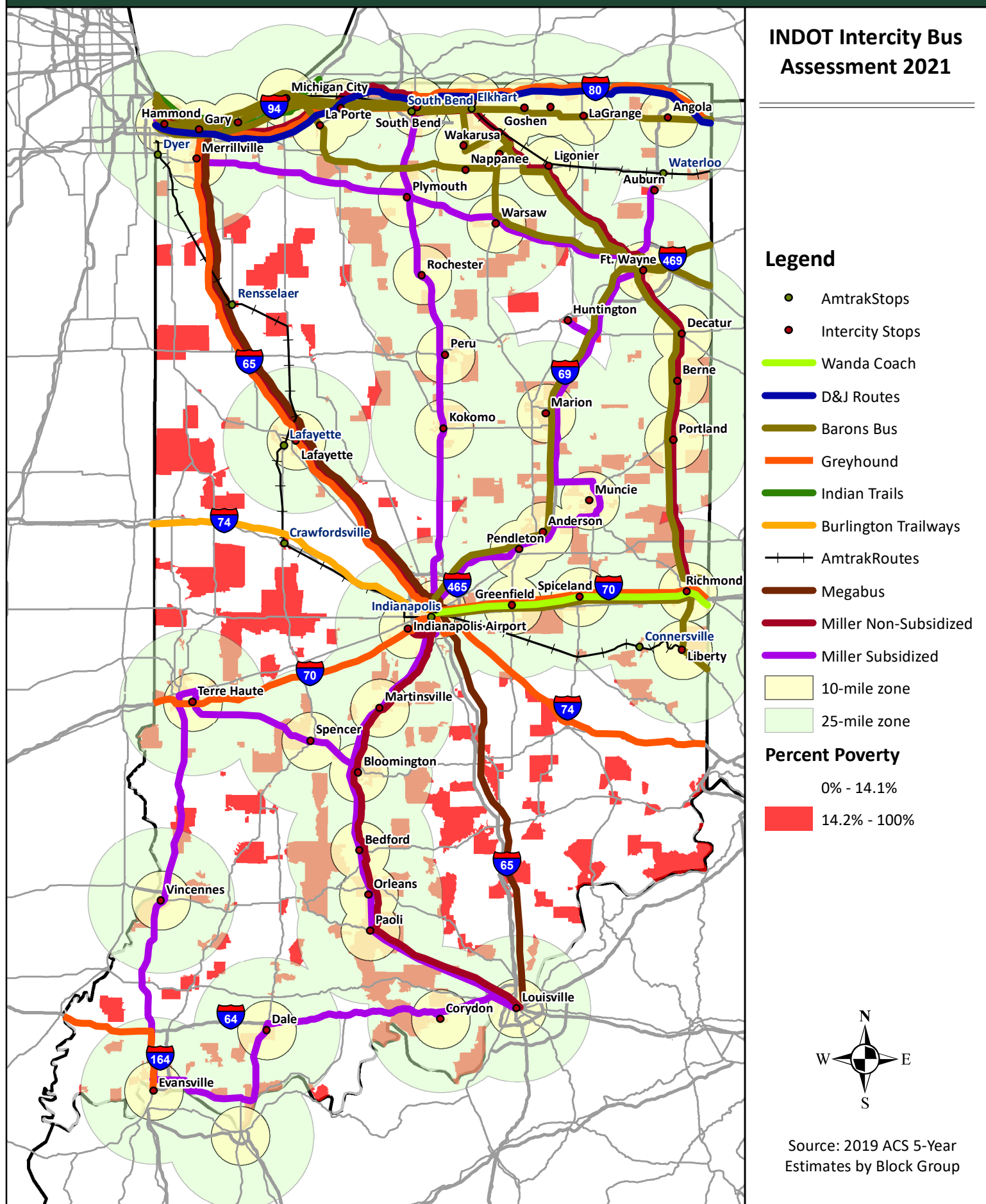
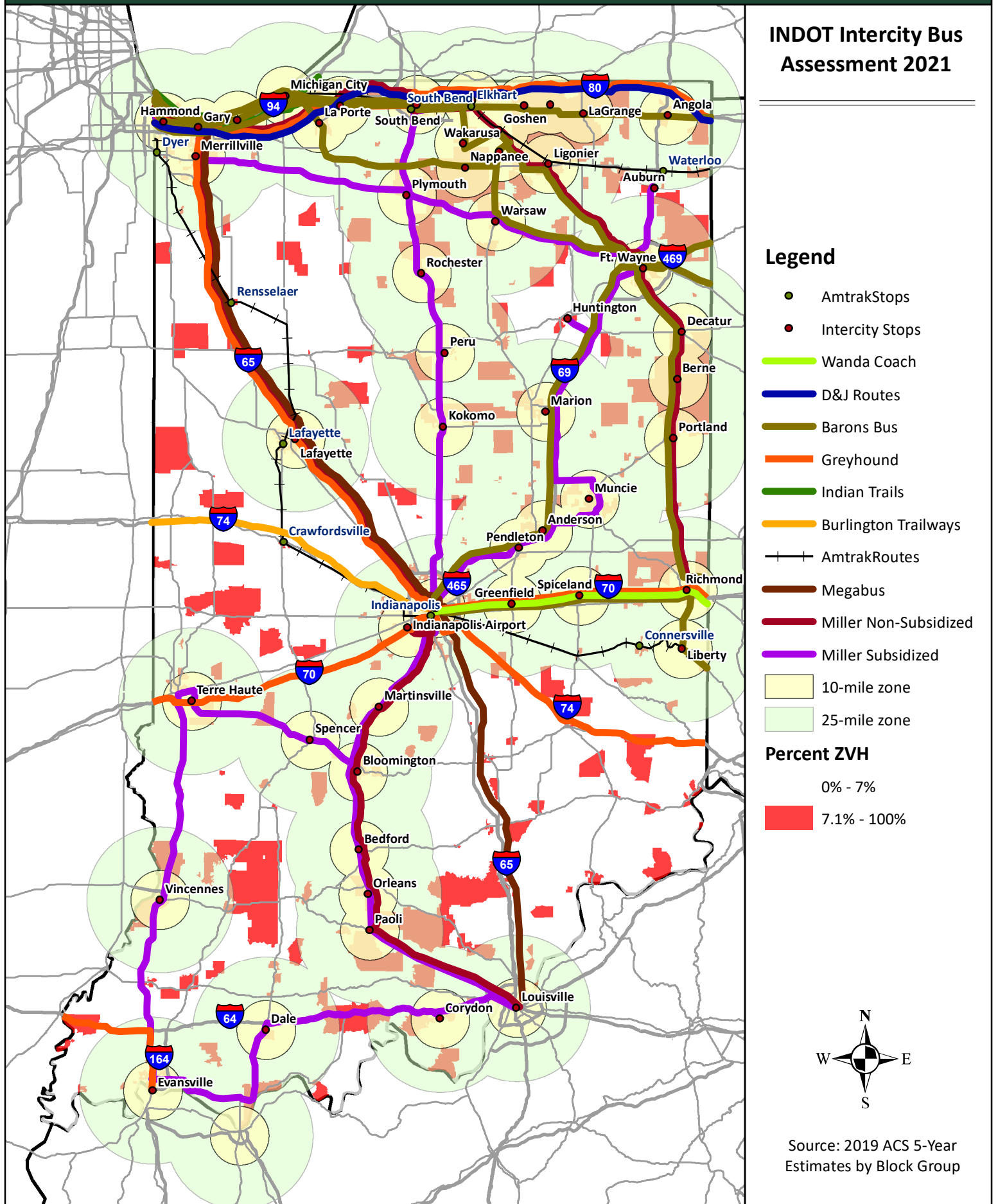


Exhibit 17: High Percentages of Zero Vehicle Households



Identify Population Proximity to Intercity Bus Stations/Stops

Analysis of the Indiana intercity bus network from a spatial perspective indicates that overall, there is good coverage across the state. With the exception of Columbus and Franklin, all of the state's 45 most populous cities are within 25 miles of an intercity bus station or stop. There are 11 of these 45 cities that are greater than 10 miles from an intercity bus station or stop. However, only 25 of 78 Indiana cities with over 10,000 population have an intercity bus station or stop in their municipality. Approximately 84 percent of the state's population is within 25 miles, and 63 percent within 10 miles from an intercity bus station or stop. Table 13 exhibits the Indiana cities with a population of at least 10,000 that have no intercity bus station/stop and are greater than 25 miles and 10 miles from an intercity bus station/stop. As previously noted, the population figures come from the 2019 American Community Survey (ACS) 5-Year Estimates.

The higher populated areas within the state that are greater than 25 miles from an intercity bus station or stop are located along I-65 both south and north of Indianapolis, along I-74 east and west of Indianapolis, and the area between Vincennes and Evansville in southwest Indiana. These areas should be considered for Section 5311(f) assistance.

There are several cities that are greater than 25 miles from an intercity bus station or stop that are located along existing intercity bus routes, but currently the existing services do not make a stop at these locations. Columbus, Franklin, and Seymour are located on I-65 south of Indianapolis on an unsubsidized Miller route. Shelbyville is located on I-74 southeast of Indianapolis, and is along a Greyhound route. Lebanon is located on I-65 between Indianapolis and Lafayette, and is found along routes served by both Burlington and Greyhound. An option is to possibly provide compensation to a carrier for the incremental costs of stopping at this location if justified by the potential ridership. In other situations, it may be more practical to provide access to the intercity connection through local transit options.

It is important to note that while Indiana has a good network of intercity bus service, the review of schedules indicated the difficulty in making a same-day round-trip, particularly from the more rural areas of the State to the larger cities. There is a demand for these more regional type trips for shopping or medical trips, for example, but schedules typically do not allow time for these activities and returning to the trip origin on the same day. Intercity bus carriers must focus on national timetables for their long-haul routes, and as a result, shorter trips often take place at more inconvenient times of the day. Service is primarily scheduled to provide service from one urban area to another over lengthy routes, making it difficult to make a same-day trip unless route frequencies are greatly increased. While this is not as much of an issue in Indiana as in some other states, it is something that INDOT should consider when scheduling any new Section 5311(f)-supported routes.

Table 13: Indiana Cities Greater Than 10,000 Population with No Intercity Bus Station/Stop and Greater Than 25 Miles from a Station or Stop

City/Town	Population	Bus Station/Stop	> 25 miles From Station	> 10 miles From Station
Indianapolis	864,447	Yes	No	No
Fort Wayne	265,752	Yes	No	No
Evansville	118,588	Yes	No	No
South Bend	102,037	Yes	No	No
Carmel	97,464	No	No	Yes
Fishers	90,332	No	No	Yes
Bloomington	84,116	Yes	No	No
Hammond	76,547	Yes	No	No
Gary	76,010	Yes	No	No
Lafayette	72,581	Yes	No	No
Muncie	68,750	Yes	No	No
Noblesville	63,071	No	No	Yes
Terre Haute	60,673	Yes	No	No
Kokomo	58,145	Yes	No	No
Greenwood	57,764	No	No	Yes
Anderson	54,513	Yes	No	No
Elkhart	52,257	Yes	No	No
Mishawaka	49,245	No	No	No
Lawrence	48,699	No	No	Yes
West Lafayette	48,551	No	No	No
Columbus	48,150	No	Yes	Yes
Jeffersonville	47,673	No	No	No
Westfield	39,610	No	No	Yes
Portage	36,648	No	No	No
New Albany	36,647	No	No	No
Richmond	35,539	Yes	No	No
Merrillville	34,889	Yes	No	No
Goshen	34,108	Yes	No	No
Valparaiso	33,355	No	No	Yes
Plainfield	32,879	No	No	No
Michigan City	31,118	Yes	No	No
Granger	30,776	No	No	No
Crown Point	29,850	No	No	No
Schererville	28,590	No	No	No
East Chicago	28,201	No	No	No
Hobart	28,049	No	No	No
Marion	27,956	Yes	No	No
Zionsville	27,463	No	No	Yes
Brownsburg	26,046	No	No	Yes
Franklin	25,106	No	Yes	Yes
Munster	22,689	No	No	No
Highland	22,581	No	No	No
Greenfield	22,160	Yes	No	No
La Porte	21,577	Yes	No	No
Clarksville	21,548	No	No	No
Seymour	19,623	No	Yes	Yes
Shelbyville	18,951	No	Yes	Yes

City/Town	Population	Bus Station/Stop	> 25 miles From Station	> 10 miles From Station
Logansport	17,966	No	No	Yes
Avon	17,453	No	No	No
St. John	17,426	No	No	Yes
Vincennes	17,304	Yes	No	No
New Castle	17,287	No	No	No
Huntington	17,067	No	Yes	Yes
New Haven	16,279	No	No	No
Griffith	16,228	No	No	No
Crawfordsville	16,090	No	Yes	Yes
Dyer	15,953	No	No	Yes
Lebanon	15,932	No	Yes	Yes
Jasper	15,827	No	No	Yes
Frankfort	15,634	No	Yes	Yes
Warsaw	15,458	Yes	Yes	No
Beech Grove	14,990	No	No	No
Chesterton	14,119	No	No	No
Bedford	13,272	Yes	No	No
Connersville	13,165	No	No	Yes
Auburn	13,056	No	Yes	Yes
Cedar Lake	12,491	No	No	Yes
Washington	12,412	No	No	Yes
Speedway	12,266	No	No	No
Lake Station	12,002	No	No	No
Madison	11,813	No	Yes	Yes
Martinsville	11,635	Yes	No	No
Peru	11,584	Yes	No	No
Greensburg	11,228	No	Yes	Yes
Yorktown	11,143	No	No	No
Greencastle	10,296	No	Yes	Yes
Wabash	10,089	No	No	Yes
Plymouth	10,054	No	No	No

Chapter 7 Demand for Intercity Bus Service

This chapter evaluates Indiana’s overall intercity bus network to determine the extent the network meets the demand for service across the state. Included is an analysis of transit propensity using demographic factors that relate to the overall demand for public transportation. Also considered is the evaluation of intercity bus service coverage with respect to major trip generators for the intercity bus industry.

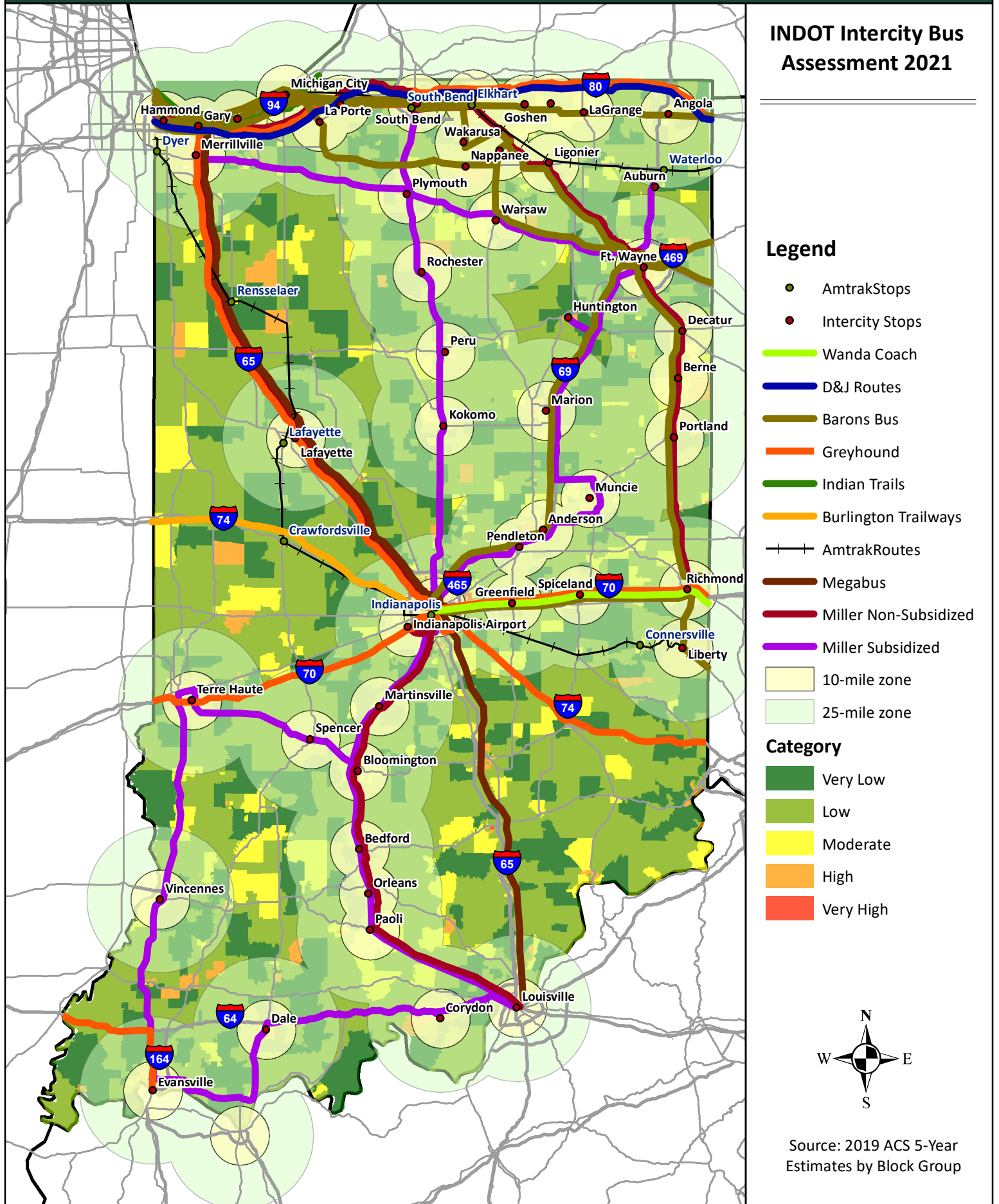
Identify Demographic Factors that Reflect Overall Need for ICB Services

A transit propensity analysis identifies areas where the demographics of location indicate a higher tendency to use transit than other areas. Transit propensity applies to traditional fixed route or demand response as well as intercity bus travel. Transportation services are typically prioritized in areas with greater population densities; however, it is also important to look at the percentage of transit-dependent populations as well.

Identifying areas of higher transit propensity is not necessarily the same as predicting transit ridership. A transit propensity analysis determines those areas with higher demand, but rural areas of the state may lack the density to support unsubsidized intercity bus service. Rural areas are often better served by Section 5311(f)-supported feeder routes that are typically provided by Section 5311-funded rural transit operators.

Exhibit 18 is a map depicting transit propensity across Indiana. Determination of transit propensity was accomplished by taking into consideration minority population, zero vehicle households, and households below poverty, which are population characteristics that reflect the likelihood of individuals using intercity bus services.

Exhibit 18: Transit Propensity



The transit propensity determination model calls for each block group to be assigned a score based on those three demographic factors of minority population, zero vehicle households, and households below poverty. For example, if a census block group had a high percentage for each population group, that block group received a score of 9. High percentages received a score of 3, average scored a 2, and low received a 1 for each factor. The total score for each block group was calculated to determine each block group's transit propensity score. A 'very low' score received a total of 3 points, 'low' 4-5 points, 'moderate' 6 points, 'high' 7-8 points, and 'very high' received a score of 9.

The intercity bus industry considers a reasonable coverage radius around an intercity bus station to be 25 miles. In addition, the total Indiana population living farther than 25 miles from an intercity bus station was calculated. **Approximately 689,945 persons in the state are outside the intercity bus service area.** This represents approximately 11 percent of the state's total population of 6,665,703, an improvement from the 12.6 percent found in the 2017 Study. This analysis indicates that from a population perspective, the state is well covered by intercity bus service.

Based on this spatial analysis, the census block groups in Indiana with the greatest demand for intercity bus service that are beyond 25 miles of an intercity bus station or stop are primarily located in three areas of the state:

- ◆ North/northwest of Lafayette near Rensselaer along I-65
- ◆ East of US 41 between Vincennes and Evansville
- ◆ West of Indianapolis and north of Terre Haute between I-70 and I-74

INDOT has indicated that a surplus of Section 5311 funds may enable INDOT to support intercity bus service expansion in some areas.

As was the case in 2017, there are no areas in Indiana with a very high transit propensity score outside of the 25-mile radius of an intercity bus station.

Intercity Bus Trip Generators

Research has concluded that colleges and universities, correctional institutions, medical facilities, commercial airports, and military bases represent the greatest generators of intercity bus service demand. While individual car ownership has had a major impact on the decline of intercity bus ridership, these institutions continue to generate the greatest number of intercity bus passengers. The preceding analysis of demographic factors addressed the potential **origin** for intercity bus trips, while this analysis of trip generators determines if the current intercity bus routes serve the places that are likely to be **destinations** for intercity bus ridership. Tables 14-18 include a list of these trip generators by category, indicating their proximity to an intercity bus stop. Exhibits 19-23 map the proximity of these major trip generators to an intercity bus station/stop. Following is a summary of the possible impact these trip generators may have on intercity bus demand.

Colleges/Universities

The extent to which colleges and university students may use intercity bus service as a means to make trips to and from home greatly depends on the distance from the student's home to the closest bus station and the distance from the college or university to the nearest bus station. While the

average distance from the home of the typical Indiana college student to the nearest bus station cannot be determined, the spatial relationship of the state's colleges and universities to intercity bus stations/stops can be determined. It is likely that the schools with the smallest enrollment will not generate enough demand to justify fixed schedule intercity bus service.

Table 14 lists the colleges and universities in Indiana and their proximity to the nearest bus station/stop. Exhibit 19 maps the location of the campuses. There are 52 four-year colleges spread over 64 campuses located throughout the state. The majority of Indiana's major colleges and universities are within ten miles of an intercity bus stop, with only eight noted below that are outside of a 25-mile radius of an intercity bus station/stop.

DePauw University and Oakland City have the largest enrollment of the colleges and universities that are greater than 25 miles from an intercity bus station/stop, with an enrollment of 2,315 and 2,350 respectively.

Rural Transit, a service of the Area 10 Agency on Aging, offers bus service in Lawrence, Monroe, Owen and Putnam counties, to anyone regardless of age or disability. This weekday service is an option for DePauw University (Putnam County) students.

- ◆ DePauw University
- ◆ Franklin College
- ◆ Hanover College
- ◆ Harrison College Columbus
- ◆ Huntington University
- ◆ Oakland City University
- ◆ Saint Joseph's College
- ◆ Wabash College

Table 14: Indiana Colleges and Universities

Map Reference	College	Location	Within 10 Miles	Within 25 Miles	Outside 25 Miles
1	Ancilla College	Plymouth		X	
2	Anderson University	Anderson	X	X	
3	Ball State University	Muncie	X	X	
4	Bethel College Mishawaka	Mishawaka	X	X	
5	Brown Mackie College Fort Wayne	Fort Wayne	X	X	
6	Brown Mackie College Michigan City	Michigan City	X	X	
7	Brown Mackie College South Bend	South Bend	X	X	
8	Butler University	Indianapolis	X	X	
9	Calumet College of Saint Joseph	Whiting	X	X	
10	Crossroads Bible College	Indianapolis	X	X	
11	DePauw University	Greencastle			X
12	Earlham College	Richmond	X	X	
13	Fortis College Indianapolis	Indianapolis		X	
14	Franklin College	Franklin			X

Map Reference	College	Location	Within 10 Miles	Within 25 Miles	Outside 25 Miles
15	Goshen College	Goshen	X	X	
16	Grace College and Theological Seminary	Winona Lake	X	X	
17	Hanover College	Hanover			X
18	Harrison College Anderson	Anderson	X	X	
19	Harrison College Columbus	Grove City			X
20	Harrison College Elkhart	Elkhart	X	X	
21	Harrison College Evansville	Evansville	X	X	
22	Harrison College Fort Wayne	Fort Wayne	X	X	
23	Harrison College Indianapolis East	Indianapolis	X	X	
24	Harrison College Lafayette	Lafayette	X	X	
25	Harrison College Northwest	Indianapolis		X	
26	Harrison College Terre Haute	Terre Haute	X	X	
27	Holy Cross College	Notre Dame	X	X	
28	Huntington University	Huntington			X
29	Indiana Institute of Technology	Fort Wayne	X	X	
30	Indiana State University	Terre Haute	X	X	
31	Indiana University Bloomington	Bloomington	X	X	
32	Indiana University East	Richmond	X	X	
33	Indiana University Kokomo	Kokomo	X	X	
34	Indiana University Northwest	Gary	X	X	
35	Indiana University Purdue University Fort Wayne	Fort Wayne	X	X	
36	Indiana University Purdue University Indianapolis	Indianapolis	X	X	
37	Indiana University South Bend	South Bend	X	X	
38	Indiana University Southeast	New Albany		X	
39	Indiana Wesleyan University	Marion	X	X	
40	International Business College	Fort Wayne	X	X	
41	International Business College Indianapolis	Indianapolis		X	
42	Manchester College	North Manchester		X	
43	Marian University	Indianapolis	X	X	
44	Martin University	Indianapolis	X	X	
45	MedTech College	Greenwood		X	
46	MedTech College Ft. Wayne Campus	Fort Wayne	X	X	
47	Oakland City University	Oakland City			X
48	Purdue University Northwest	Hammond	X	X	
49	Purdue University Main Campus	West Lafayette	X	X	
50	Rose Hulman Institute of Technology	Terre Haute	X	X	
51	Saint Joseph's College	Rensselaer			X
52	Saint Mary's College	Notre Dame	X	X	
53	Saint Mary of the Woods College	West Terre Haute	X	X	
54	Taylor University	Upland	X	X	
55	The Art Institute of Indianapolis	Indianapolis		X	
56	Trine University	Angola	X		
57	University of Evansville	Evansville	X	X	
58	University of Indianapolis	Indianapolis	X	X	
59	University of Notre Dame	Notre Dame	X	X	
















Map Reference	College	Location	Within 10 Miles	Within 25 Miles	Outside 25 Miles
60	University of Phoenix Indianapolis Campus	Indianapolis		X	
61	University of Saint Francis Fort Wayne	Fort Wayne	X	X	
62	University of Southern Indiana	Evansville	X	X	
63	Valparaiso University	Valparaiso		X	
64	Wabash College	Crawfordsville			X

Exhibit 19: Indiana Colleges and Universities



INDOT Intercity Bus Assessment 2021

Legend

-  Colleges
-  Amtrak Stops
-  Intercity Stops
-  Wanda Coach
-  D&J Routes
-  Barons Bus
-  Greyhound
-  Indian Trails
-  Burlington Trailways
-  Amtrak Routes
-  Megabus
-  Miller Non-Subsidized
-  Miller Subsidized
-  10-mile zone
-  25-mile zone



Correctional Facilities

Correctional facilities generate a relatively modest demand for intercity bus service from relatives who take the bus for visitation with inmates, service needed when inmates are released from the facilities, and prison employees.

Table 15 lists the correctional facilities in Indiana with their proximity to the nearest intercity bus station. Exhibit 20 includes a map showing the locations of 23 State and/or Federal correctional facilities in Indiana. Of these, six are beyond 25 miles of an intercity bus station/stop. These include:

- ◆ Edinburgh Correctional Facility
- ◆ Madison Correctional Facility (Female)
- ◆ Branchville Correctional Facility
- ◆ Putnamville Correctional Facility
- ◆ Rockville Correctional Facility (Female)
- ◆ Wabash Valley Correctional Facility

Table 15: Indiana Correctional Facilities

Map Reference	Facility	Location	Within 10 Miles	Within 25 Miles	Outside 25 Miles
1	Chain O'Lakes Correctional Facility	Albion		X	
2	Edinburgh Correctional Facility	Edinburgh			X
3	Madison Correctional Facility (Female)	Madison			X
4	South Bend Community Re-Entry Center	South Bend	X	X	
5	Heritage Trail Correctional Facility	Plainfield	X	X	
6	Branchville Correctional Facility	Branchville			X
7	Correctional Industrial Facility	Pendleton	X	X	
8	New Castle Correctional Facility	New Castle		X	
9	Plainfield Correctional Facility	Plainfield	X	X	
10	Putnamville Correctional Facility	Greencastle			X
11	Rockville Correctional Facility (Female)	Rockville			X
12	Westville Correctional Facility	Westville		X	
13	Miami Correctional Facility	Bunker Hill		X	
14	Wabash Valley Correctional Facility	Carlisle			X
15	Indiana State Prison	Michigan City	X	X	
16	Indiana Women's Prison	Indianapolis	X	X	
17	Pendleton Correctional Facility	Pendleton	X	X	
19	Reception Diagnostic Center (Male)	Plainfield	X	X	
20	Federal Correctional Institution, Terre Haute	Terre Haute	X	X	
21	LaPorte Juvenile Correctional Facility	LaPorte	X	X	
22	Logansport Juvenile Correctional Facility	Logansport		X	
23	Pendleton Juvenile Correctional Facility	Pendleton	X	X	

Exhibit 20: Indiana Correctional Facilities



INDOT Intercity Bus Assessment 2021

Legend

- ▲ Prisons
- Amtrak Stops
- Intercity Stops
- Wanda Coach
- D&J Routes
- Barons Bus
- Greyhound
- Indian Trails
- Burlington Trailways
- +— Amtrak Routes
- Megabus
- Miller Non-Subsidized
- Miller Subsidized
- 10-mile zone
- 25-mile zone



Military Bases

Military bases serve as a generator of intercity bus trips primarily due to many military personnel not having access to a private vehicle while living on base. In some areas they can be a significant contributor to ridership. There are 61 bases located in Indiana.

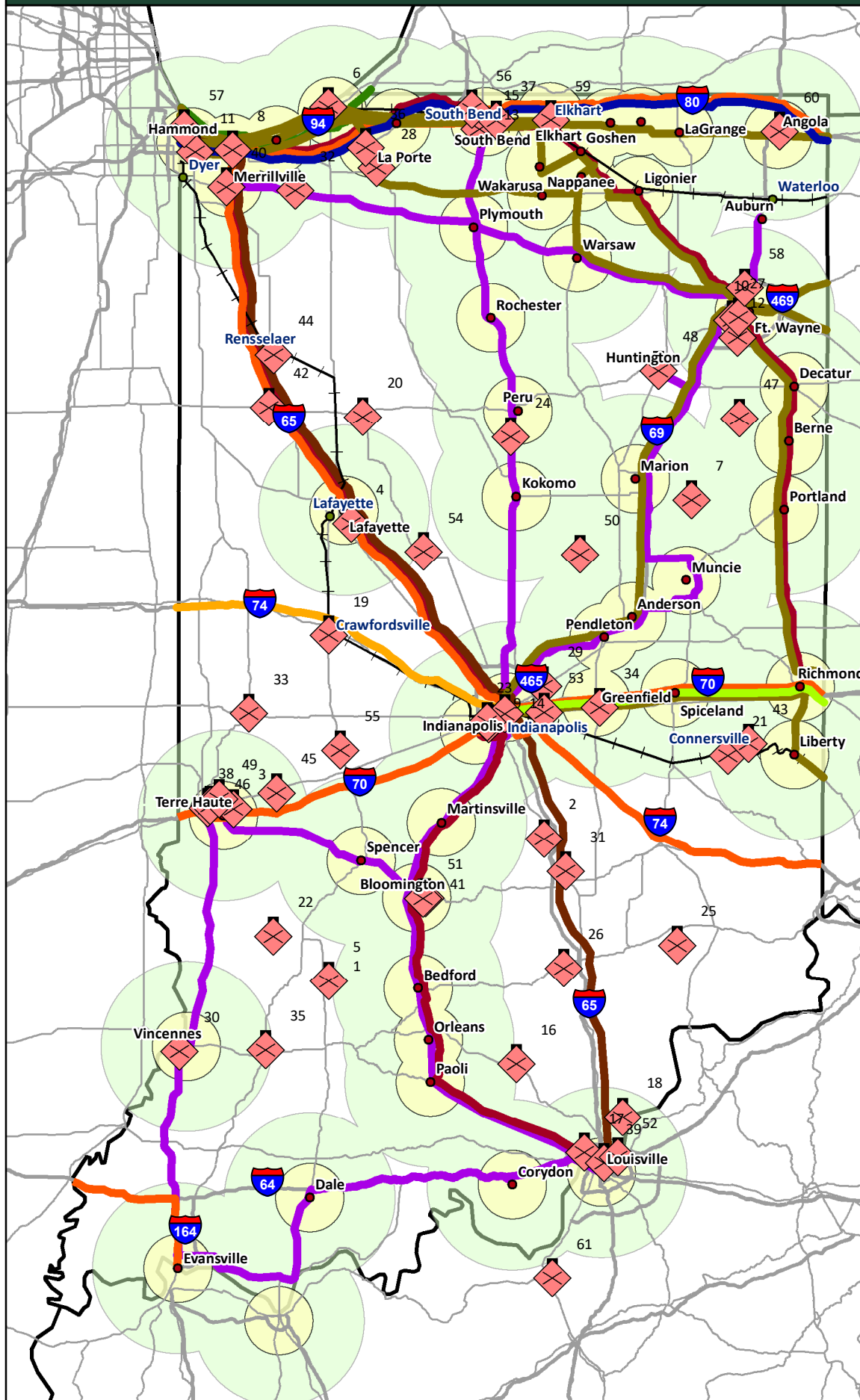
Table 16 lists the military bases/locations in Indiana. As shown, 17 bases/locations are located farther than 25 miles from an intercity bus stop. Exhibit 21 includes a map showing the location of these military bases.

Table 16: Indiana Military Bases or Locations

Map Reference	Facility	Location	Within 10 Miles	Within 25 Miles	Outside 25 Miles
1	Naval Surface Warfare Center - Crane Division	Crane			X
2	Indiana National Guard	Edinburgh			X
3	Indiana National Guard	Terre Haute	X	X	
4	Indiana Army National Guard	Lafayette	X	X	
5	Crane Army Ammunition Activity	Crane			X
6	Indiana Army National Guard	Michigan City	X	X	
7	Indiana National Guard	Hartford City	X	X	
8	Indiana National Guard	Gary	X	X	
9	Indiana National Guard	Indianapolis	X	X	
10	US Army Department	Fort Wayne	X	X	
11	Indiana Army National Guard	Hammond	X	X	
12	Indiana National Guard	Fort Wayne	X	X	
13	US Marine Corps Reserve	South Bend	X	X	
14	US Marine Corps	Indianapolis	X	X	
15	State of Indiana Army National Guard	South Bend	X	X	
16	Salem Armory	Salem			X
17	US Army	New Albany		X	
18	US Army	Charlestown		X	
19	National Guard Recruiting	Crawfordsville			X
20	Indiana National Guard	Monticello			X
21	Grissom Aeroplex	Bunker Hill		X	
22	Indiana National Guard	Linton			X
23	Indiana Army National Guard	Indianapolis	X	X	
24	US Marine Reserve Center	Peru	X	X	
25	Indiana National Guard	Holton			X
26	Indiana National Guard	Seymour			X
27	US Army Reserve	Fort Wayne	X	X	
28	US Army Reserve	Kingsbury	X	X	
29	US Army Reserve	Indianapolis		X	
30	Indiana Army National Guard	Vincennes	X	X	
31	Indiana National Guard	Columbus			X
32	Indiana National Guard	Valparaiso		X	
33	Indiana National Guard	Rockville			X
34	Indiana National Guard	Greenfield	X	X	
35	Indiana National Guard	Washington		X	
36	Indiana National Guard	La Porte	X	X	

Map Reference	Facility	Location	Within 10 Miles	Within 25 Miles	Outside 25 Miles
37	Indiana Army National Guard	Mishawaka	X	X	
38	US Defense Department	Terre Haute	X	X	
39	US Army Department	Jeffersonville	X	X	
40	US Army Reserve	Merrillville	X	X	
41	Indiana Army National Guard	Bloomington	X	X	
42	Indiana National Guard	Remington			X
43	Indiana National Guard	Connersville		X	
44	Indiana National Guard	Rensselaer			X
45	National Guard Armory	Brazil		X	
46	Indiana National Guard	Terre Haute	X	X	
47	Indiana National Guard	Bluffton		X	
48	Indiana National Guard	Huntington			X
49	Indiana National Guard	Terre Haute	X	X	
50	Indiana National Guard	Elwood		X	
51	US Army Reserve Center	Bloomington	X	X	
52	US Coast Guard-Auxiliary	Jeffersonville	X	X	
53	Air Force Reserve	Indianapolis		X	
54	Indiana National Guard	Frankfort			X
55	Indiana National Guard	Greencastle			X
56	US Army Reserve	South Bend	X	X	
57	US Defense Logistics Agency	Hammond	X	X	
58	US Military Department	Fort Wayne	X	X	
59	Elkhart Civil Air Patrol	Elkhart	X	X	
60	National Guard Armory	Angola	X	X	
61	US Army Department	Fort Knox			X

Exhibit 21: Indiana Military Bases



INDOT Intercity Bus Assessment 2021

Legend

- Military Bases
- Amtrak Stops
- Intercity Stops
- Wanda Coach
- D&J Routes
- Barons Bus
- Greyhound
- Indian Trails
- Burlington Trailways
- Amtrak Routes
- Megabus
- Miller Non-Subsidized
- Miller Subsidized
- 10-mile zone
- 25-mile zone



Medical Facilities

Medical facilities generate a relatively small number of intercity bus trips, particularly those with a small number of patient beds. Notably, such trips may require that a connection be made between the intercity bus station and the hospital via local transit or taxi service.

There are 151 identified major medical facilities that are located throughout the state. Of these, 81 are located within 10 miles of an intercity bus station, with only 23 being located farther than 25 miles from a stop.

Table 17 lists these medical facilities and their proximity to intercity bus stations, while Exhibit 22 includes a map of these locations.

Table 17: Indiana Medical Facilities

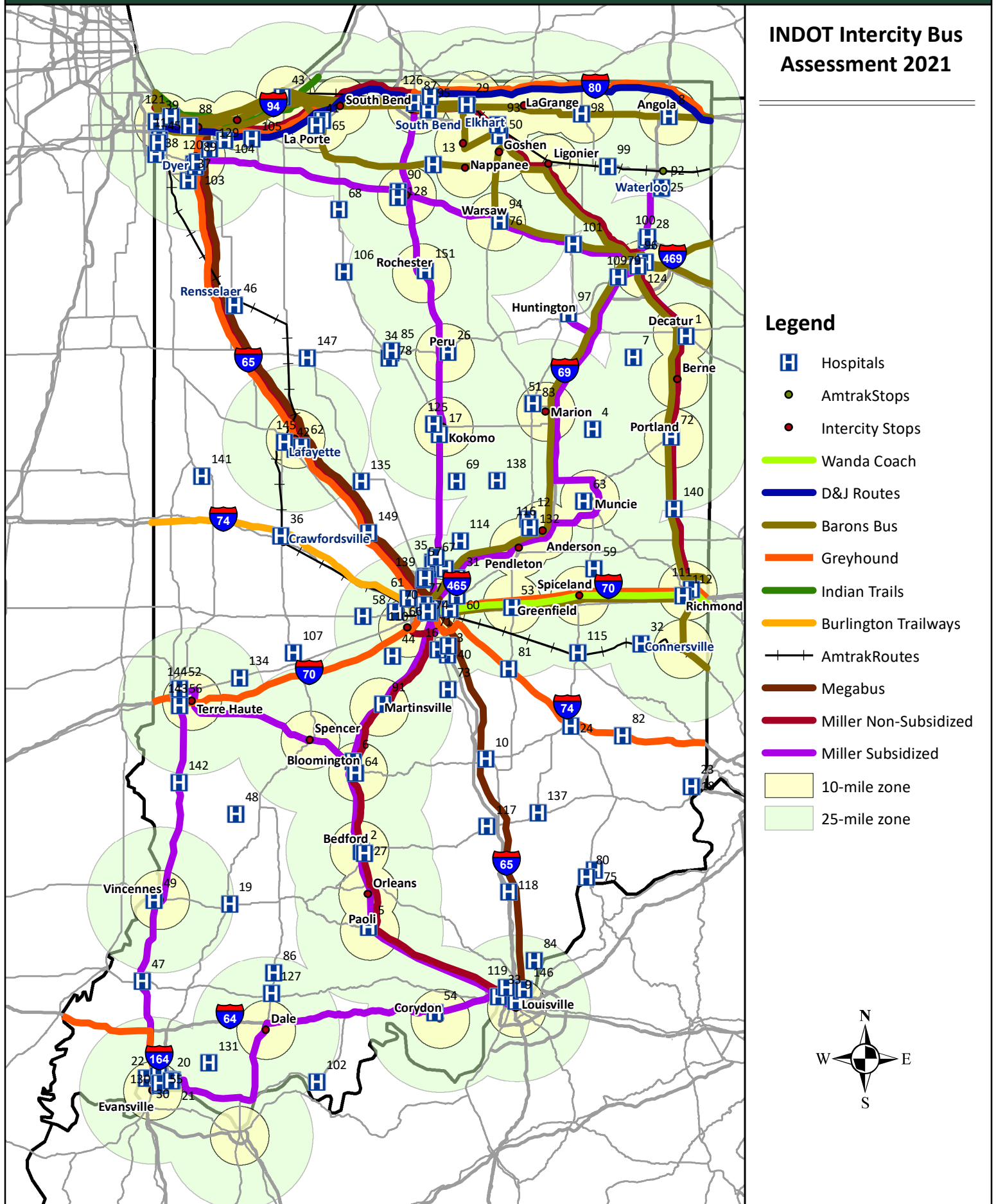
Map Reference	Facility	Location	Within 10 Miles	Within 25 Miles	Outside 25 Miles
1	Adams Memorial Hospital	Decatur	X	X	
2	Bedford Regional Medical Center	Bedford	X	X	
3	BHC Valle Vista Hospital	Greenwood		X	
4	Blackford Community Hospital	Hartford City		X	
5	Bloomington Hospital of Orange County	Paoli	X	X	
6	Bloomington Meadows Hospital	Bloomington	X	X	
7	Bluffton Regional Medical Center	Bluffton		X	
8	Cameron Memorial Community Hospital	Angola	X	X	
9	Clark Memorial Hospital	Jeffersonville	X	X	
10	Columbus Regional Health	Columbus			X
11	Community Hospital	Munster	X	X	
12	Community Hospital of Anderson and Madison County	Anderson	X	X	
13	Community Hospital of Bremen	Bremen		X	
14	Community Hospital East	Indianapolis	X	X	
15	Community Hospital North	Indianapolis		X	
16	Community Hospital South	Indianapolis		X	
17	Community Howard Regional Health	Kokomo	X	X	
18	Community Mental Health Center	Lawrenceburg			X
19	Daviess Community Hospital	Washington		X	
20	Deaconess Cross Pointe Center	Evansville	X	X	
21	Deaconess Gateway Hospital	Newburgh	X	X	
22	Deaconess Hospital	Evansville	X	X	
23	Dearborn County Hospital	Lawrenceburg			X
24	Decatur County Memorial Hospital	Greensburg			X
25	DeKalb Memorial Hospital	Auburn		X	
26	Dukes Memorial Hospital	Peru	X	X	
27	Dunn Memorial Hospital	Bedford	X	X	
28	Dupont Hospital	Fort Wayne	X	X	
29	Elkhart General Hospital	Elkhart	X	X	
30	Evansville Psychiatric Children's Center	Evansville	X	X	
31	Fairbanks Hospital	Indianapolis		X	
32	Fayette Memorial Hospital Association	Connersville		X	

Map Reference	Facility	Location	Within 10 Miles	Within 25 Miles	Outside 25 Miles
33	Floyd Memorial Hospital and Health Services	New Albany	X	X	
34	Four County Counseling Center	Logansport		X	
35	Franciscan Health Carmel	Carmel		X	
36	Franciscan Health Crawfordsville	Crawfordsville			X
37	Franciscan Health Crown Point	Crown Point	X	X	
38	Franciscan Health Dyer	Dyer		X	
39	Franciscan Health Hammond	Hammond	X	X	
40	Franciscan Health Indianapolis	Indianapolis		X	
41	Franciscan Beacon Hospital	LaPorte	X	X	
42	Franciscan Health Lafayette East	Lafayette	X	X	
43	Franciscan Health Michigan City	Michigan City	X	X	
44	Franciscan Health Mooresville	Mooresville		X	
45	Franciscan Health Munster	Munster	X	X	
46	Franciscan Health Rensselaer	Rensselaer			X
47	Gibson General Hospital	Princeton			X
48	Greene County General Hospital	Linton			X
49	Good Samaritan Hospital	Vincennes	X	X	
50	Goshen General Hospital	Goshen	X	X	
51	Grant-Blackford Mental Health	Marion	X	X	
52	Hamilton Center	Terre Haute	X	X	
53	Hancock Regional Hospital	Greenfield	X	X	
54	Harrison County Hospital	Corydon	X	X	
55	HealthSouth Deaconess Rehabilitation Hospital	Evansville	X	X	
56	HealthSouth Hospital of Terre Haute	Terre Haute	X	X	
57	Heart Center of Indiana	Indianapolis		X	
58	Hendricks Regional Health	Danville		X	
59	Henry County Memorial Hospital	New Castle		X	
60	Indiana Heart Hospital	Indianapolis	X	X	
61	Indiana Orthopedic Hospital	Indianapolis	X	X	
62	Indiana University Health Arnett Hospital	Lafayette	X	X	
63	Indiana University Health Ball Memorial Hospital	Muncie	X	X	
64	Indiana University Health Bloomington Hospital	Bloomington	X	X	
65	Indiana University Health La Porte Hospital	La Porte	X	X	
66	Indiana University Health Methodist Hospital	Indianapolis	X	X	
67	Indiana University Health North Hospital	Carmel		X	
68	Indiana University Health Starke Hospital	Knox		X	
69	Indiana University Health Tipton Hospital	Tipton		X	
70	Indiana University Health West Hospital	Avon	X	X	
71	Indiana University Health University Hospital	Indianapolis	X	X	
72	Jay County Hospital	Portland	X	X	
73	Johnson Memorial Hospital	Franklin		X	
74	Kindred Hospital	Indianapolis	X	X	

Map Reference	Facility	Location	Within 10 Miles	Within 25 Miles	Outside 25 Miles
75	King's Daughters Hospital and Health Services	Madison			X
76	Kosciusko Community Hospital	Warsaw	X	X	
77	Larue D. Carter Memorial Hospital	Indianapolis	X	X	
78	Logansport State Hospital	Logansport		X	
79	Lutheran Hospital of Indiana	Fort Wayne	X	X	
80	Madison State Hospital	Madison			X
81	Major Hospital	Shelbyville		X	
82	Margaret Mary Community Hospital	Batesville			X
83	Marion General Hospital	Marion	X	X	
84	Medical Center of Southern Indiana	Charlestown		X	
85	Memorial Hospital	Logansport		X	
86	Memorial Hospital and Health Care Center	Jasper		X	
87	Memorial Hospital of South Bend	South Bend	X	X	
88	Methodist Hospitals-Gary	Gary	X	X	
89	Methodist Hospitals-Merrillville	Merrillville	X	X	
90	Michiana Behavioral Health Center	Plymouth	X	X	
91	Morgan Hospital & Medical Center	Martinsville	X	X	
92	Northeastern Center	Auburn		X	
93	Oaklawn Psychiatric Center	Goshen	X	X	
94	Otis R. Bowen Center for Human Services	Warsaw	X	X	
95	Our Lady of Peace Hospital	Mishawaka	X	X	
96	Parkview Hospital Randallia	Fort Wayne	X	X	
97	Parkview Huntington Hospital	Huntington			X
98	Parkview LaGrange Hospital	LaGrange	X	X	
99	Parkview Noble Hospital	Kendallville		X	
100	Parkview Regional Medical Center	Fort Wayne		X	
101	Parkview Whitley Hospital	Columbia City			X
102	Perry County Memorial Hospital	Tell City		X	
103	Pinnacle Hospital	Crown Point	X	X	
104	Portage Hospital	Portage	X	X	
105	Porter Regional Hospital	Valparaiso	X	X	
106	Pulaski Memorial Hospital	Winamac			X
107	Putnam County Hospital	Greencastle			X
108	Regency Hospital of Northwest Indiana	East Chicago	X	X	
109	Rehabilitation Hospital of Fort Wayne	Fort Wayne	X	X	
110	Rehabilitation Hospital of Indiana	Indianapolis	X	X	
111	Reid Hospital and Health Care Services	Richmond	X	X	
112	Richmond State Hospital	Richmond	X	X	
113	Riley Hospital for Children	Indianapolis	X	X	
114	Riverview Hospital	Noblesville		X	
115	Rush Memorial Hospital	Rushville		X	
116	Saint John's Health System	Anderson	X	X	
117	Schneck Medical Center	Seymour			X
118	Scott County Memorial Hospital	Scottsburg			X
119	Southern Indiana Rehabilitation Hospital	New Albany	X	X	
120	Southlake Center for Mental Health	Merrillville	X	X	
121	St. Catherine Hospital	East Chicago	X	X	
122	St. Elizabeth Ann Seton Hospital of Carmel	Carmel		X	

Map Reference	Facility	Location	Within 10 Miles	Within 25 Miles	Outside 25 Miles
123	St. Elizabeth Ann Seton Hospital of Indianapolis	Indianapolis		X	
124	St. Joseph Hospital	Fort Wayne	X	X	
125	St. Joseph Hospital and Health Center	Kokomo	X	X	
126	St. Joseph Regional Medical Center	Mishawaka	X	X	
127	St. Joseph's Hospital of Huntingburg	Huntingburg		X	
128	St. Joseph's Regional Medical Center	Plymouth	X	X	
129	St. Mary Medical Center	Hobart	X	X	
130	St. Mary's Hospital and Medical Center	Evansville	X	X	
131	St. Mary's Warrick Hospital	Boonville		X	
132	St. Vincent Anderson Regional Hospital	Anderson	X	X	
133	St. Vincent Carmel Hospital	Carmel		X	
134	St. Vincent Clay Hospital	Brazil		X	
135	St. Vincent Frankfort Hospital	Frankfort			X
136	St. Vincent Hospital and Health Services	Indianapolis		X	
137	St. Vincent Jennings Hospital	North Vernon			X
138	St. Vincent Mercy Hospital	Elwood		X	
139	St. Vincent Pediatric Rehabilitation Center	Indianapolis		X	
140	St. Vincent Randolph Hospital	Winchester		X	
141	St. Vincent Williamsport Hospital	Williamsport			X
142	Sullivan County Community Hospital	Sullivan			X
143	Terre Haute Regional Hospital	Terre Haute	X	X	
144	Union Hospital	Terre Haute	X	X	
145	Wabash Valley Hospital	West Lafayette	X	X	
146	Wellstone Regional Hospital	Jeffersonville	X	X	
147	White County Memorial Hospital	Monticello			X
148	Sidney & Lois Eskenazi Hospital	Indianapolis	X	X	
149	Witham Health Services	Lebanon			X
150	Women's Hospital	Newburgh	X	X	
151	Woodlawn Hospital	Rochester	X	X	

Exhibit 22: Indiana Medical Facilities



Commercial Airports

Airport service can be directly to the airport terminal or to a transfer center enabling passengers to reach the airport with a single transfer. There are six commercial airports in Indiana, all of which are located within ten miles of an intercity bus station.

A list of the airports and their locations is shown in Table 18. Exhibit 23 is a map of all commercial airports in Indiana showing their proximity to intercity bus stations.

Table 18: Indiana Commercial Airports

Map Reference	Facility	Location	Within 10 Miles
1	Evansville Regional Airport	Evansville	X
2	Fort Wayne International Airport	Fort Wayne	X
3	Indianapolis International Airport	Indianapolis	X
4	South Bend International Airport	South Bend	X
5	Gary/Chicago International Airport	Gary	X
6	Indianapolis Regional Airport	Greenfield	X

Exhibit 23: Indiana Commercial Airports



INDOT Intercity Bus Assessment 2021

Legend

- Airports
- Amtrak Stops
- Intercity Stops
- Wanda Coach
- D&J Routes
- Barons Bus
- Greyhound
- Indian Trails
- Burlington Trailways
- Megabus
- Miller Non-Subsidized
- Miller Subsidized
- 10-mile zone
- 25-mile zone



Summary

Generally, the designated major contributors to intercity bus ridership are well positioned relative to their proximity to intercity bus stations or stops. Of 305 trip generators recognized in this study, only 54 (17.7 percent) are located greater than 25 miles from an intercity bus station or stop. The notable exceptions are medical facilities, due to the number of small facilities in the rural areas of the state, and military bases. The state's rural transit agencies help alleviate intercity bus needs to medical facilities in these areas through their volume of out-of-county medical trips.

Chapter 8 Evaluation of Section 5311(f)-Funded Routes

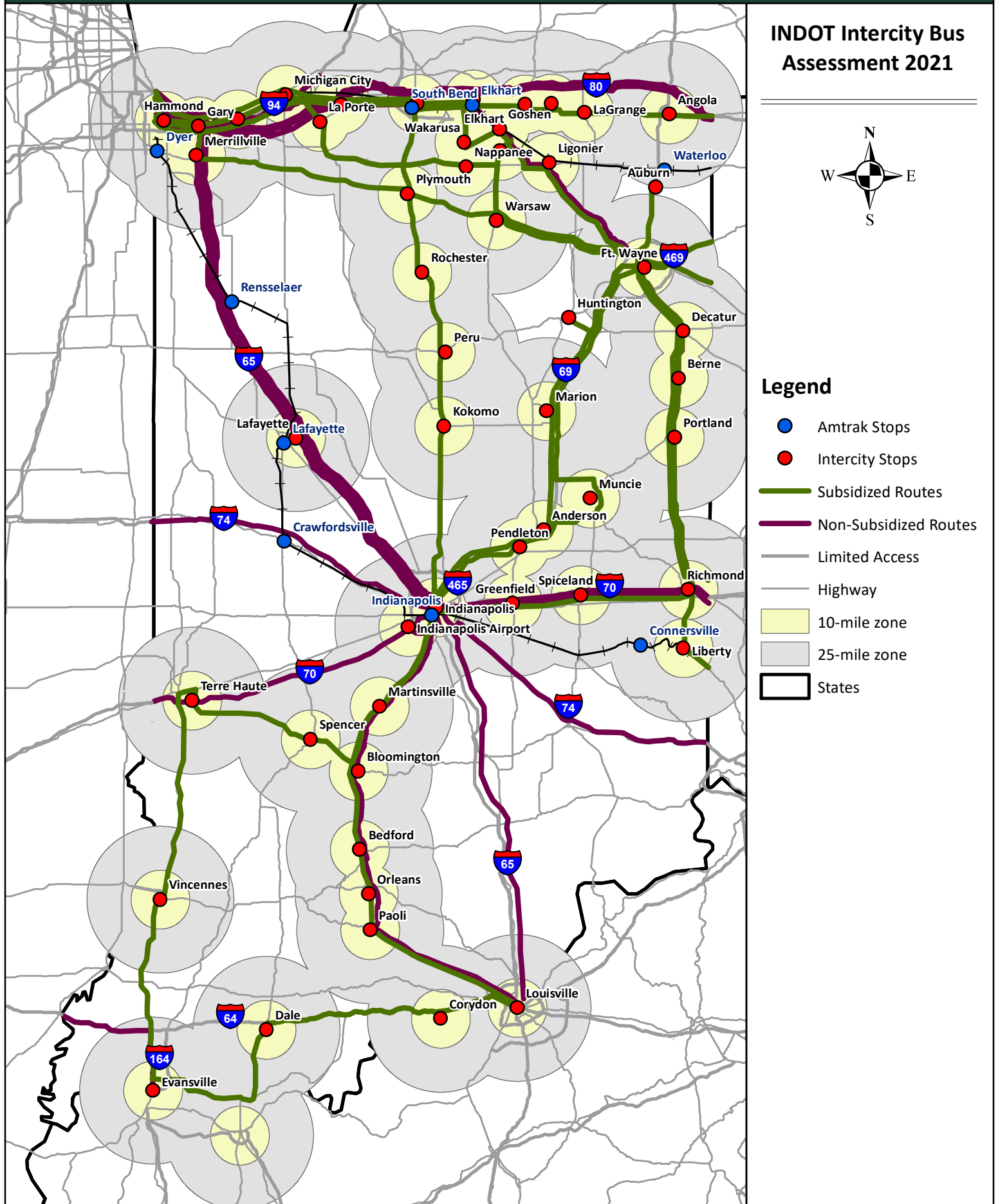
As noted in Chapter 3 of the study, there are ten Indiana intercity bus routes that are funded through the Section 5311(f) program: four operated by Barons and six by Miller. This is an increase of two subsidized routes from the number operated at the time of the 2017 Study. At that time, Barons operated three Section 5311(f)-funded routes, and Miller operated five. The additional Barons route is Angola to Gary via LaGrange, Shipshewana, Middlebury, South Bend, and Burns Harbor that the carrier began operating as a subsidized route in August 2019. Miller's additional route between Columbus, Ohio and Chicago via Richmond, Fort Wayne, Warsaw, Merrillville and Gary, initially operated as a non-subsidized route, became subsidized in 2017.

While Indiana is well served by the existing intercity bus network, there are some additional intercity bus needs in the state as previously discussed in Chapters 6 and 7. As projects may be developed in the future to address these needs through the Section 5311(f) grant solicitation process, the state's Section 5311(f) apportionment will continue to be divided among more projects for funding. Therefore, due to the possibility of future new intercity bus projects and more limited funds to meet these needs, it is imperative that current subsidized routes are evaluated for efficiency and effectiveness, while also providing performance measures for any future projects.

As previously noted, the data analysis of areas and population served by Indiana's intercity bus network determined that the state is well served with 46 percent of the population residing within ten miles of an intercity bus stop, while the percentage increases to 84 percent with a 25-mile radius is used to analyze the level of coverage.

The Section 5311(f)-supported services play a pivotal role in the intercity bus coverage. Without the Barons and Miller Section 5311(f)-supported service, the state's population within 25 miles of existing stops is 70 percent, and the population within 10 miles of existing stops is 37 percent of the population. Exhibit 24 is a map indicating the 10-mile and 25-mile radius for Section 5311(f)-funded routes and non-subsidized routes.

Exhibit 24: Existing Intercity Bus Routes & Stops



An evaluation of the intercity bus population coverage in the state indicates that there is relatively little overlap between the Section 5311(f)-supported routes and the non-subsidized routes in the state. The limited overlap is attributable to the low-cost curbside carriers using the same corridors as the traditional carriers. INDOT has wisely utilized Section 5311(f) to fill the gaps where the intercity bus carriers had failed to provide service.

Performance Measures for Subsidized Intercity Bus Services

INDOT has yet to establish performance measures to assess the Section 5311(f)-funded routes. Barons and Miller, the operators of the state's Section 5311(f)-supported services, provide limited performance measures in evaluating their services. However, each carrier routinely collects data that would be required to maintain typical performance measures as called for in this study. RLS research has found that other surrounding states routinely collect data to enable the evaluation of the Section 5311(f)-funded service.

For example, Hocking-Athens-Perry Community Action Programs (HAPCAP) has been selected to serve as the administrator of the Ohio DOT intercity bus program's GoBus service. The KFH Group, Inc. prepared **2019 Ohio Intercity Bus Study** included information regarding HAPCAP's collection of detailed data on Barons-operated GoBus ridership, which is summarized by route, schedule, and stop on a monthly and annual basis. The study noted that this data is developed from very detailed ridership data on boardings and alightings by stop by trip. This data is collected by Barons and made available to HAPCAP and ODOT. This same data and reporting procedure could—and should—be adopted by INDOT to ensure that there is an established periodic review of the performance of the state's Section 5311(f)-supported routes.

Intercity bus performance standards are typically based on revenue miles as opposed to revenue hours, which are more associated with urban transit operations. This is due to carriers operating at more consistent speeds and intercity bus costs are likely to be driven by miles rather than service hours.

Consistent with the 2017 Study, both Barons and Miller consolidated all reporting, with no detailed information for each subsidized route. **RLS strongly recommends that INDOT consider requiring Quarterly Operating Data Reports and Quarterly Operating Financial Status Reports for each Section 5311(f)-funded route, not a consolidated report.** Further, INDOT is advised to require the subsidized carriers to report for each stop on the Section 5311(f) supported routes. This procedure, if enacted, will enable INDOT to evaluate each route independently, by stop, on a quarterly basis for efficiency and effectiveness. For this study, Barons and Miller submitted ridership, cost, and revenue data to enable the computation of the various performance measures. Data was also derived from the year-end totals included in the fourth quarter **2019 Quarterly Operating Data** reports.

The following performance measures were calculated using this data:

- ◆ Farebox recovery ratio, or the percentage of fully allocated operating costs covered by fares;
- ◆ Boardings per trip, the total passengers divided by number of vehicle trips;

- ◆ Cost per rider, the total costs divided by number of passengers;
- ◆ Subsidy per rider, the total operating costs, less fare revenue, divided by number of passenger boardings; and
- ◆ Revenue per mile, the total farebox revenue divided by revenue miles.

Farebox Recovery Ratio

Farebox recovery ratio is the ratio of fare revenue collected to total operating costs. A high ratio indicates a need for the intercity bus services and passenger's willingness to pay for the service. Farebox recovery also, to some extent, reflects the carrier's ability to minimize operating costs. It also reflects the degree to which providers are minimizing operating costs.

Routes with farebox ratios falling below their classification threshold, as noted above, should be evaluated resulting in remedies for improvement. Routes that continue to experience farebox recovery at levels below these thresholds following the introduction of improvement actions, should be considered for elimination by INDOT.

Routes perform at different levels of success for various reasons, but primarily due to the population density through which the route travels. Typically routes that originate or terminate in a larger urban area, such as Indianapolis, should be expected to have higher farebox revenue as compared to routes that operate entirely in less densely populated rural areas. Most states establish a tiered approach for the farebox recovery ratio anticipated from different Section 5311(f)-funded routes. It is recommended that INDOT use the following farebox recovery ratio threshold for Section 5311(f)-supported routes:

- ◆ Minimum of 30 percent for routes with one end serving Indianapolis
- ◆ Minimum of 20 percent for all other routes
- ◆ Minimum of 10 percent for feeder services

2019 Results

As seen in Table 19, for 2019 Barons farebox recovery ranged from 12 percent to 34 percent, with an average of 27 percent. Barons' most productive route is Liberty to Fort Wayne, with a farebox recovery of 34 percent. This is consistent with the 2016 results from the 2017 Study. Fort Wayne to Gary, the only Barons' route with an Indianapolis stop, recovers 23 percent from the farebox, down from 28 percent in 2016. As expected with a new route, the Angola-Gary route recovered only 12 percent from the farebox in 2019. New routes typically take at least two years to achieve their potential ridership. INDOT should continue to monitor this route for its productivity and consider additional marketing activities as needed.

In 2019, Miller routes produced a farebox recovery of 10 percent to 73 percent, resulting in an average per route of 40 percent. At a 73 percent recovery ratio, the carrier's Louisville-Indianapolis route was the greatest fare producer, closely followed by Louisville-Evansville at 69 percent. The carrier's farebox recovery declines substantially for the remaining four routes, to a low of 10 percent for the Indianapolis-Muncie route. [The carrier attributes this significant fare production disparity among routes to the inconsistency of Greyhound schedules into and out of Indianapolis and a less than adequate marketing effort. With a farebox recovery of only 10 percent, Miller should consider

additional marketing efforts for the Indianapolis-Muncie route, with INDOT closely monitoring the route's future productivity.

Table 19: Evaluation of Section 5311(f)-Funded Routes Based on 2019 Data

Carrier/Route	Total Boardings	Total Cost	Total Revenue	Net Cost	Farebox Recovery Ratio	Boardings per Trip	Cost Per Rider	Subsidy per Rider	Revenue per Mile
Barons Bus									
Liberty – Fort Wayne	22,056	\$1,104,245	\$376,041	\$728,204	34%	30.21	\$50.06	\$33.01	\$2.04
Fort Wayne – Gary	12,032	\$737,158	\$167,736	\$569,422	23%	16.48	\$61.26	\$47.32	\$1.10
Richmond – Gary	12,818	\$1,052,874	\$266,812	\$786,062	25%	17.56	\$82.14	\$61.32	\$1.36
Angola – Gary*	2,093	\$272,901	\$32,813	\$240,088	12%	6.84	\$130.38	\$114.70	\$0.63
Total/Average	48,999	\$3,167,178	\$843,402	\$2,323,776	27%	19.63	\$64.63	\$47.42	\$1.44
Miller Transportation									
Louisville – Evansville	7,494	\$338,428	\$233,490	\$104,938	69%	10.26	\$45.15	\$14.00	\$2.62
Indianapolis – Elkhart	6,473	\$485,450	\$190,549	\$294,901	39%	12.30	75.00	\$45.56	\$1.49
Indianapolis – Evansville	10,184	\$651,890	\$236,620	\$415,270	36%	13.95	\$64.01	\$40.78	\$1.38
Indianapolis - Muncie	3,391	\$399,456	\$38,562	\$360,894	10%	2.32	\$117.80	\$106.43	\$0.37
Louisville - Indianapolis	12,939	\$463,258	\$337,472	\$125,786	73%	17.72	\$35.80	\$9.72	\$2.77
Fort Wayne - Gary	3,856	\$492,385	\$97,117	\$395,268	20%	5.28	\$38.05	\$102.51	\$0.75
Total/Average	44,337	\$2,830,867	\$1,133,810	\$1,697,057	40%	8.68	\$63.85	\$38.28	\$1.52

* Barons' Angola – Gary route started August 2019

Boardings Per Trip

Route productivity can be measured by boardings per trip, which is calculated by dividing the total annual passengers by the total annual trips for each Section 5311(f) route. Consistent with farebox

recovery, tiers of service should be considered. For example, ridership should be higher on those routes that serve large urban areas such as Indianapolis, as opposed to more rural routes. **The following thresholds are recommended: a minimum of 10 boardings per trip for routes with one end serving Indianapolis; and a minimum of 3 boardings per trip for all other routes, including feeder services.**

For those routes operating for at least two years and with a low volume of boardings per trip, it is recommended that INDOT evaluate and consider service modifications. INDOT should expect Section 5311(f)-supported routes to achieve half of the minimum thresholds in their initial year of operation.

2019 Results

Consistent with the results noted from the previous study, with the exception of the new Angola-Gary route, Barons' routes are performing very well from a boardings-per-trip perspective. At a rate of 30 boardings per trip, the Liberty-Fort Wayne route is by far the most productive. For the remaining routes, with the exception of the new Angola-Gary route, all are well above the 10 boardings per trip rate, resulting in an average of nearly 20 boardings per trip.

While Miller routes performed very well on average from the farebox, average boardings per trip of 8.68 is not as impressive, but still well above the 3 boardings per trip rate. Indianapolis-Muncie is the only route stopping in Indianapolis that does not meet the 10 boardings per trip threshold. Again, this is likely attributable to the inconsistent Greyhound scheduling in and out of Indianapolis and insufficient marketing.

Cost Per Rider

The extent to which the intercity bus carrier has minimized costs as well as generated ridership can be measured by the cost per rider. This performance measure is calculated by dividing total route costs by the number of riders. Following two years of operation, the cost per rider **should not exceed \$60.**

2019 Results

Barons' Liberty-Fort Wayne route falls under the \$60 cost per rider threshold at approximately \$50, and Fort Wayne-Gary only exceeds the threshold by \$1 at about \$61 per rider. Again, the new Angola-Gary route well exceeds the \$60 benchmark and should be closely monitored. The average cost per rider of nearly \$65 is beyond the suggested maximum per route.

Three of Miller's six subsidized routes fall well below the \$60 cost per rider threshold, and the Indianapolis-Evansville route just exceeds it at a cost of \$64 per rider. Again, Indianapolis-Muncie is the route with the greatest concern at a rate of nearly \$118 per rider. This route's productivity should be of concern for both the carrier and INDOT.

Subsidy Per Rider

Subsidy per rider is calculated by total route operating costs less fare revenue divided by number of riders. Subsidy is defined as the total amount of funds that is needed to fill the gap between the total cost of service, minus collected revenue, regardless of the source of the subsidizing funds. Subsidy per rider should take into consideration the typical long-distance nature of an intercity trip. However, routes with very high costs/subsidy per rider should be evaluated to see if those trips could be

provided by a less costly mode, or whether that amount of Section 5311(f) funds should be spent on that service or expended on another route. Subsidy per passenger **should not exceed \$50 per passenger.**

2019 results

The Barons Liberty-Fort Wayne and Fort Wayne-Gary routes are performing well under this performance measurement, with both under the \$50 subsidy per passenger. Consistent with other performance measures, the new Angola-Gary route subsidy per rider of nearly \$115 is over double the suggested threshold of \$50 per passenger. The carrier's average of approximately \$47 is below the suggested threshold.

Miller routes average a subsidy per rider of approximately \$38, well below the \$50 per passenger threshold. Louisville-Evansville and Louisville-Indianapolis performs particularly well in this category with \$14 and about \$10 respectively. Indianapolis-Elkhart and Indianapolis-Evansville also do well, with each performing below the \$50 per passenger level. Indianapolis-Muncie and Fort Wayne-Gary both well exceed the suggested threshold at approximately \$106 and \$102.50 respectively.

Revenue Per Mile

Total farebox revenue divided by revenue miles, that is, the miles a vehicle actually travels while in revenue service. This measurement reflects the effectiveness of the route from a revenue perspective and is a commonly-used performance measure in the transit industry. **Intercity bus routes should achieve a minimum revenue per mile of \$0.50 per mile if serving Indianapolis, or a minimum of \$0.40 per mile for other routes.**

2019 results

All Barons' routes produced revenue above the \$0.50 per mile rate, with the Liberty-Fort Wayne route far outperforming the carrier's other routes at a rate of \$2.04 per mile. Consistent with all performance measures, the new Angola-Gary route substantially underperformed the other routes.

Miller routes, with the exception of the Indianapolis-Muncie route, had 2019 revenue per mile rates well above the \$0.50 threshold. The Louisville-Evansville and Louisville-Indianapolis routes substantially outperformed the routes at revenue per mile rates of \$2.62 and \$2.77 respectively.

On-Time Performance

Due to its emphasis of high-performance standards for its intercity bus program, INDOT has determined that on-time performance should be utilized as a future measurement of performance quality for the Section 5311(f) funded routes. Research has found that there is little guidance by the intercity bus industry regarding a reasonable on-time performance measurement. Based on knowledge of the industry and the transit industry in particular, the performance measurement goal will be 80 percent on-time stops, with on-time defined as 10 minutes before or after the designated stop time.

Cost Per Mile Analysis: Barons and Miller

INDOT requires applicants for Section 5311(f) funding to provide a Cost Per Mile Identification, which includes the operating, administrative, and capital expenses. The sum identifies the cost per mile charged by each carrier. The cost per mile for the Section 5311(f)-supported routes provided by Barons and Miller varies considerably by carrier.

For its four Section 5311(f)-funded routes, Barons' 2021 application included cost per mile rates of \$4.00, \$3.75, \$3.80, and \$3.70 for the Liberty-Fort Wayne, Fort Wayne-Gary, and Richmond-Gary, and Angola-Gary routes respectively. All Barons' expenses are under the operating category, with no administration or capital expenses noted. In its Section 5311(f) application, Barons notes that operating experience allows them to uncover correct charges for interlining tickets, agency set-up, tolls and utilization of equipment that will vary by route. Barons' total expenses are calculated into either fixed or variable costs and then are separated by route.

Miller cites a cost per mile rate of \$3.80 for all its Section 5311(f)-supported routes, the same rate used by the carrier at the time of the previous study. The carrier's wages and salaries are more than double of that charged by Barons. Miller includes no expenses under the "other" line item; instead, it includes expenses under both administration and capital expense categories that Barons had included under "other" in their 2021 application. Miller's administration and capital categories of their cost per mile rate total \$1.87, considerably more than the "other" line item in Barons' application.

Based on the consultant's research of cost per mile rates for other intercity bus carriers, it is believed that while Barons' rate is higher than the Miller rate, the cost per mile rates for both Barons and Miller are reasonable. As was noted in the 2017 Study, in an effort to ensure that intercity bus services supported with Section 5311(f) funding are provided as cost efficiently as possible, INDOT may want to consider employing a bid procedure for its Section 5311(f)-supported routes rather than the current procedure of soliciting applications from the carriers for the intercity bus routes they would like to operate with Section 5311(f) assistance. Both carriers consistently use the cost per mile determination included in their respective applications for the claims calculation of their reimbursements under their Section 5311(f) grants.

Marketing Initiatives

Due to the dramatic impact of COVID-19 on Indiana's intercity bus carriers, marketing of these services has likely never been more important as the industry tries to recover from the pandemic. It is for this reason, and the desire of INDOT to maximize ridership on its Section 5311(f)-funded routes, that INDOT included the determination of marketing strategies and investments in the study methodology. There are two target groups of intercity bus industry customers where marketing should be focused: retaining riders who already use the intercity bus network and attracting new riders from the transit dependent population which primarily consists of the elderly, persons with disabilities, low-income individuals, and those individuals without access to a vehicle.

One of the major obstacles to overcome through the marketing of intercity bus service is public awareness of the mode. Surveys, along with intercity bus experience, reveal that the awareness of intercity bus service in most communities is lacking. Those aware of its existence likely do not know

the extent of the intercity bus network, how to access the service, or the nearest intercity bus stop. The solution is to market intercity bus as a viable transportation option, particularly to groups that are considered more easily reachable, such as college students and the elderly.

Marketing is an eligible expense under the Section 5311(f) program, with up to 80 percent federal share and 20 percent non-federal match. INDOT recognized the imminent need to market Section 5311(f)-supported services, and in 2021 provided a supplement of \$200,000 to both Barons and Miller to be used for marketing efforts. INDOT requires a marketing plan as an element of its Section 5311(f) application. Further, INDOT requires Section 5311(f) applicants to include in the project budget an amount not to exceed ten percent of the total project budget for marketing expenses.

INDOT requires that the service be marketed locally. It requires the funded service, schedules, and other applicable information should be placed in local, regional and national information sources, such as ***Russell's Official National Motor Coach Guide***. Informational materials about the service must be accessible on the operator's website.

Based on input from Indiana's intercity bus carriers, research of intercity bus marketing efforts in other states, and the consultant's knowledge of the intercity bus industry, it is recommended that INDOT and the state's carriers consider utilizing the following marketing activities to stimulate ridership.

- ◆ INDOT should require a route-specific marketing plan from each Section 5311(f)-funded carrier in the submitted funding applications.
- ◆ New technological platforms, particularly app-based sectors, should be monitored for use by the carriers.
- ◆ The INDOT website, and possibly additional state government websites, could be used to publicize intercity bus services.
- ◆ Develop and distribute marketing materials and service information at public agencies (service centers, resource centers, human service agencies, etc.).
- ◆ Use Section 5311(f) funds to support a marketing campaign that could include ads on TV, radio, online, or print media such as newspapers, with increased placement volume during high traffic travel seasons.
- ◆ Participate in local community events and parades.
- ◆ Develop marketing agreements with INDOT Section 5311 subrecipients for intercity bus service in their respective service areas.
- ◆ Market directly to specific populations such as college students, their parents, and the elderly. This could include having a representative(s) at special functions to enhance a carrier's marketing presence in the area.
- ◆ Carriers should work with community colleges and other colleges and universities to have intercity bus carrier links on their respective websites.
- ◆ Promote Google Transit, the Russell's Guide trip planner, and intercity bus carrier websites as trip planning tools.
- ◆ Include intercity bus in Indiana's 211 system.
- ◆ Install bus station directional signs across the state to serve as both a navigational and awareness tool.
- ◆ Encourage carriers to advertise on their vehicles through designed wrapping techniques.

- ◆ Encourage carriers to enhance their respective websites to create new riders through web searches and to enhance their Search Engine Optimization/Search Engine Marketing (SEO/SEM) ratings.
- ◆ Encourage carriers to invest in pay-per-click (PPC) advertising that will appeal to key demographic markets.
- ◆ Carriers could coordinate with Amtrak to list their respective services on Amtrak's website.
- ◆ Publish press releases and consistently push news outlets for coverage when opportunities arise.
- ◆ Encourage carriers to develop their own mobile app as a marketing tool for selling tickets, track when and where a bus will arrive, bringing up customer information, and finding special promotions.
- ◆ Use social media platforms such as Facebook, Twitter, , Instagram, etc. Social media is an inexpensive way to increase brand awareness and keep marketing costs low.
- ◆ Consider advertising through local sports teams and at sporting venues.

A successful marketing campaign will require a cooperative effort between INDOT, the state's public transportation providers, and particularly the intercity bus carriers. Such a partnership can be productive for all involved parties. The marketing approach can and should go beyond the intercity bus industry. A statewide marketing initiative can show potential riders how to access public transportation at all levels and modes.

Miller has successfully branded its Indiana service as the very recognizable *Hoosier Ride*. It is suggested that as part of its marketing campaign that INDOT initiate a strategy to brand the State's intercity bus service to give it an identity in the eyes of the public. For example, the Ohio Department of Transportation has developed GO Bus as the brand for its intercity bus services using Section 5311(f) funds. The 2019 Ohio Intercity Bus Study notes that the GO Bus program has been quite successful, including wrapped buses, wifi and power outlets on all buses, well-marked stop and terminal locations, a supporting website with connecting services, a simplified and promoted fare structure, extensive local promotion at stop locations in its service area, and support coordination with local transit systems and agencies. Due to the multimodal nature of intercity bus and public transportation in general, a collaborative marketing effort could go beyond the intercity bus industry to include other public transportation modes.

Chapter 9 Conclusions, Observations, and Recommendations

INDOT ICB Study Conclusions and Observations

- ◆ The intercity bus industry has been impacted greatly by the COVID-19 pandemic, with most carriers experiencing at least 60–80 percent loss of revenue, but there are signs of recovery.
- ◆ Prior to COVID-19, ridership on the Section 5311(f)-funded routes had remained at a sustained level.
- ◆ There are additional bus companies, all low-cost curbside carriers, serving Indiana since the 2017 Study.
- ◆ Indiana has a high level of intercity bus service with the combination of Section 5311(f)-funded routes as well as the market-driven routes that operate without subsidy.
- ◆ The state’s carriers currently operate 24 routes as compared to the 18 operated in 2017.
- ◆ A total of 51 communities in Indiana have an intercity bus station or stop, an increase from 47 served communities in 2017.
- ◆ With a net increase of six routes and four additional served stations or stops, Indiana has realized an unanticipated increase in intercity bus service since 2017.
- ◆ Subsidized intercity bus routes connect with a significant number of public transportation systems in the state.
- ◆ There are new stops at the Evansville Airport and in the communities of Angola, LaGrange, Middlebury, Shipshewana, and Spiceland, while Miller has discontinued service to Princeton and Washington on its Indianapolis to Nashville route.
- ◆ Barons has added their Angola-Gary route since the 2017 Study, while Miller operates one additional subsidized route.
- ◆ While not serving Indiana, it is noteworthy that Lakefront Trailways, once a major intercity bus carrier in the Midwest, ceased operations in September 2021.
- ◆ All public outreach stakeholder groups indicated the need for additional intercity bus service in Indiana.
- ◆ While INDOT utilizes all of its 15 percent Section 5311(f) apportionment for intercity bus services, the Office of Transit has indicated that there is a surplus of Section 5311 funds that could be used for intercity bus projects if needed.
- ◆ The City of Marion no longer receives Section 5311(f) funding for its user-side subsidy intercity bus service, having last received the subsidy in 2018.
- ◆ In 2019, Amtrak terminated its Hoosier State train, but continues to operate the Cardinal, which provides service thrice-weekly between Chicago and Indianapolis, serving the same communities as the Hoosier State, plus Connersville.
- ◆ In 2009, there were 48 cities in the state with a population of over 10,000 that were greater than 25 miles from an intercity bus station or stop. The number has been reduced to 13 cities in 2021.
- ◆ The state continues to be well served geographically, with 84 percent of the population living within 25 miles of an intercity bus station or stop, while 46 percent reside within 10 miles.

- ◆ The higher populated areas within the state that are greater than 25 miles from an intercity bus station or stop are located along I-65 both south and north of Indianapolis, along I-74 east and west of Indianapolis, and the area between Vincennes and Evansville in southwest Indiana.
- ◆ **It is difficult to make a same-day round trip in the state on intercity bus, particularly from the more rural areas to the larger cities.**
- ◆ The designated major contributors to intercity bus ridership are well served by the intercity bus network, with only about 18 percent of 305 major trip generators located greater than 25 miles from an intercity bus station or stop.
- ◆ **There is relatively little overlap between the Section 5311(f)-supported routes and the non-subsidized routes in the state.**
- ◆ The subsidized carriers do not submit route-specific quarterly financial and operating reports to INDOT.
- ◆ INDOT does not have performance measures to periodically assess the Section 5311(f)-funded routes.
- ◆ The Section 5311(f) funded routes are generally performing well, with the Barons' Angola-Gary route and Miller's Indianapolis-Muncie route being the least productive of the state's ten subsidized routes.
- ◆ While the state's level of intercity bus service is high, there is a lack of awareness of the availability of the services, signaling the need for enhanced intercity bus marketing efforts.

Recommendations to Improve Indiana's Intercity Bus Services

The following recommendations to enhance Indiana's intercity bus service are derived from the research and observations associated with the study, and input from the state's intercity bus carriers and public transportation providers.

- ◆ Maintain the service coverage of the state's current intercity bus network, unless route performance and/or service demand calls for changes.
 - INDOT should continue to support the Section 5311(f)-funded routes. Routes should be allowed sufficient time to recover from the pandemic before any changes are initiated.
 - Carriers should submit Section 5311(f) applications that reflect route modifications to enhance ridership and performance and for route additions to meet gaps in the intercity bus network.
- ◆ Marketing and informational efforts must be enhanced to inform the public of the availability of intercity bus services in an effort to increase service usage.
 - Recommended marketing initiatives found in the Marketing Initiative heading.
- ◆ Support improved service quality, including safety and security.
 - INDOT should consider utilizing a modest amount of Section 5311/Section 5311(f) funds to support the intercity bus infrastructure and improve the comfort and safety

- of intercity bus stops. This could mean adding shelters or benches at stops that are not open at all departure times or those that lack passenger seating.
- Provide real-time bus information through cooperation with the intercity bus carriers.
 - INDOT should promote trip planning tools through cooperation with carriers.
 - Install security cameras at bus stops to improve passenger safety.
- ◆ Consideration should be made to a modest level of intercity bus service expansion, with priority given to the following routes or services:
- Evansville – Oakland City - Vincennes – Washington – Montgomery – Bloomington – Indianapolis
 - Indianapolis – Lafayette – Rensselaer – Dyer – Chicago
 - Add new stops along existing intercity bus routes as warranted
 - Encourage the state’s rural public transportation providers to provide feeder connections to existing stops on the intercity bus network
- ◆ Section 5311(f)-funded operators should submit route specific quarterly financial and operating reports to INDOT, with a year-end report that includes boardings and alightings for each stop on the route and performance data for each route.



Appendix A: Survey Instruments



Prepared for the Indiana
Department of
Transportation, Office of
Transit



Intercity Bus Needs Assessment and Service Evaluation Update General Stakeholders Survey

The Indiana Department of Transportation (INDOT) is conducting a study to update the 2017 Intercity Bus Needs Assessment and Service Evaluation. The updated study will determine the level of intercity bus demand in the State of Indiana, evaluate service gaps, analyze the productivity of the routes supported with Section 5311(f) funds, and determine the impact of COVID-19 on the State's intercity bus service. This information will be used to determine how INDOT can best utilize its annual apportionment of Federal Section 5311(f) Intercity Bus Program funds.

Intercity bus service is defined as:

"Regularly scheduled bus service for the general public which operates with limited stops over fixed routes connecting two or more urban areas not in close proximity, which has the capacity for transporting baggage carried by passengers, and which makes meaningful connections with scheduled intercity bus service to more distant points, if such service is available."
Greyhound is an example of a provider of intercity bus service.

Feeder service is defined as:

"Public transportation service that is designed to pick up passengers in a certain locality, and transport them to a transfer point where they can connect with an intercity bus to extend their trip to another stop on the connecting service."

To assist in the planning process, you are requested to complete this brief survey. INDOT is surveying intercity bus carriers, public transportation providers, transportation planners, and city/county officials, throughout the state to obtain wide input on potential needs. For more information please contact:

Charles Glover, Senior Associate
RLS & Associates, Inc.
Tel.: 919-971-5668/Email: cglover@rlsandassoc.com

Please Complete Survey By November 24, 2020

1. Contact Information

Name & Title

Agency

Address

Address 2

City/Town

State/Province

ZIP/Postal Code

Email Address

Phone Number

2. Agency Website

3. Do you think there are currently intercity bus service (as defined above) needs in your area that are not being met?

☐ Yes

☐ No



Intercity Bus Needs Assessment and Service Evaluation Update General Stakeholders Survey

4. If "yes," please identify three top areas of need by origin/destination pairs.

1

2

3



Intercity Bus Needs Assessment and Service Evaluation Update General Stakeholders Survey

Intercity bus service is defined as:

"Regularly scheduled bus service for the general public which operates with limited stops over fixed routes connecting two or more urban areas not in close proximity, which has the capacity for transporting baggage carried by passengers, and which makes meaningful connections with scheduled intercity bus service to more distant points, if such service is available." Greyhound is an example of a provider of intercity bus service.

Feeder service is defined as:

"Public transportation service that is designed to pick up passengers in a certain locality, and transport them to a transfer point where they can connect with an intercity bus to extend their trip to another stop on the connecting service."

5. Including the need for intercity bus services (as defined above), what are the greatest unmet public transportation needs in your rural/regional area? (please prioritize)

1	<input type="text"/>
2	<input type="text"/>
3	<input type="text"/>
4	<input type="text"/>
5	<input type="text"/>
6	<input type="text"/>

6. Do you presently have a need in your area for intermodal passenger facilities that would provide connections between local public transportation and intercity bus services?

- ☐ Yes
- ☐ No

If "yes," please explain

7. Are there other intercity bus facility-related needs in your area?

☐ Yes

☐ No

If "yes," please explain



Intercity Bus Needs Assessment and Service Evaluation Update General Stakeholders Survey

8. For what purpose are most intercity bus trips in your area made? Check all that are appropriate:

- ☐ Medical Appointments
- ☐ Employment
- ☐ Family Visits
- ☐ Other (please specify)

9. If your area has intercity bus service, on a scale of 1-4, with "1" representing no importance and "4" representing a high degree of importance, please rank the value of intercity bus service in your area. (Indicate one)

Not important	Somewhat Important	Important	Very Important
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

10. If your area does not have intercity bus service, on a scale of 1-4, with "1" representing no importance and "4" representing a high degree of importance, of what value do you think it would have for your community: (Indicate one)

Not important	Somewhat Important	Important	Very Important
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

11. Would you support the use of Federal and state dollars to fund the operation of intercity bus services in your area?

- ☐ Yes
- ☐ No

12. Please describe any intercity bus needs that you have not addressed in an earlier question and/or provide any additional comments you may have.



INDOT Intercity Bus Needs Assessment and Service Evaluation Intercity Bus Carriers Survey

The Indiana Department of Transportation (INDOT) is conducting a study to update the 2017 Intercity Bus Needs Assessment and Service Evaluation. The updated study will determine the level of intercity bus demand in the State of Indiana, evaluate service gaps, analyze the productivity of the routes supported with Section 5311(f) funds, and determine the impact of COVID-19 on the State's intercity bus service. This information will be used to determine how INDOT can best utilize its annual apportionment of Federal Section 5311(f) Intercity Bus Program funds.

To assist in the planning process, you are requested to complete this brief survey. INDOT is also surveying transportation planners, city/county officials, and public transportation providers throughout the State to obtain wide input on potential needs.

For more information please contact:

Charles Glover, RLS & Associates, Inc., Tel.: 919-971-5668, Email: cglover@rlsandassoc.com

Please Complete Survey By November 24, 2020

1. Contact Information

Name & Title

Company

Address

Address 2

City/Town

State/Province

ZIP/Postal Code

Email Address

Phone Number

2. Company Website

3. Please list all intercity bus stations/stops in Indiana to which you currently provide service:

1

2

3

4

5

6

7

8

9

10

4. If you provide service to more than 10 stations/stops, please list the remaining locations below

5. Please attach timetables for the intercity bus service provided in Indiana.

PDF, DOC/DOCX, PNG, JPG/JPEG, and GIF's are allowable uploaded formats

Choose File

Choose File

No file chosen

6. Please list the Indiana stations/stops that you have terminated, either temporarily or permanently, as a result of COVID-19.

1

2

3

4

5

6

7

8

9

10

7. Please provide ridership and revenue by route and by month for all of 2019 and 2020 as available, for each Indiana route. (can be attached to survey response in PDF format)

Choose File

Choose File

No file chosen

8. Please provide any additional information regarding the impact of COVID-19 on your Indiana service.



INDOT Intercity Bus Needs Assessment and Service Evaluation Intercity Bus Carriers Survey

9. Please describe any other services you operate, such as connections to airports or Amtrak stations, in Indiana.

10. Please describe the sources used to inform the public of the availability of intercity bus services, such as brochures, website, posted schedules, local media, etc.

11. Please describe your service connections with local public transportation providers in Indiana?

12. Do you feel there are deficiencies in any of the connections with local public transportation providers?

☐ Yes

☐ No

If yes, please explain



INDOT Intercity Bus Needs Assessment and Service Evaluation Intercity Bus Carriers Survey

13. Please describe specific areas or corridors in Indiana where there is a need for intercity bus service? This could include areas void of service or corridors where additional schedules are needed.

14. Is there a demand for intercity bus service to destinations that are not currently served?

☐ Yes

☐ No



INDOT Intercity Bus Needs Assessment and Service Evaluation Intercity Bus Carriers Survey

15. If you answered yes to question 14, please identify route(s) by origin/destination pairs that could benefit most from the provision or improvement of services.



INDOT Intercity Bus Needs Assessment and Service Evaluation Intercity Bus Carriers Survey

16. Is there demand for feeder services to existing intercity bus stations/stops?

☐ Yes

☐ No



INDOT Intercity Bus Needs Assessment and Service Evaluation
Intercity Bus Carriers Survey

17. If you answered yes to question 16, please identify the feeder route(s) by origin/destination pairs.



INDOT Intercity Bus Needs Assessment and Service Evaluation Intercity Bus Carriers Survey

18. Do you receive federal and/or state transit funds to support any of these routes?

☐ Yes

☐ No

If "yes," identify the funded routes.

19. Do you presently have a need in your area for intermodal passenger facilities that could allow connections between local public transportation and intercity bus services?

☐ Yes

☐ No

If yes please explain:

20. Please provide any additional comments you have regarding intercity bus service in Indiana that has not been addressed by an earlier survey response:



Intercity Bus Needs Assessment and Service Evaluation Update Public Transportation Providers Survey

The Indiana Department of Transportation (INDOT) is conducting a study to update the 2017 Intercity Bus Needs Assessment and Service Evaluation. The updated study will determine the level of intercity bus demand in the State of Indiana, evaluate service gaps, analyze the productivity of the routes supported with Section 5311(f) funds, and determine the impact of COVID-19 on the State's intercity bus service. This information will be used to determine how INDOT can best utilize its annual apportionment of Federal Section 5311(f) Intercity Bus Program funds.

Intercity bus service is defined as:

"Regularly scheduled bus service for the general public which operates with limited stops over fixed routes connecting two or more urban areas not in close proximity, which has the capacity for transporting baggage carried by passengers, and which makes meaningful connections with scheduled intercity bus service to more distant points, if such service is available."
Greyhound is an example of a provider of intercity bus service.

Feeder service is defined as:

"Public transportation service that is designed to pick up passengers in a certain locality, and transport them to a transfer point where they can connect with an intercity bus to extend their trip to another stop on the connecting service."

To assist in the planning process, you are requested to complete this brief survey. INDOT is surveying intercity bus carriers, transportation planners, and city/county officials, throughout the state to obtain wide input on potential needs. For more information please contact:

Charles Glover, Senior Associate
RLS & Associates, Inc.
Tel.: 919-971-5668/Email: cglover@rlsandassoc.com

Please Complete Survey By November 24, 2020

1. Contact Information

Name & Title

Agency

Address

Address 2

City/Town

State/Province

ZIP/Postal Code

Email Address

Phone Number

2. Agency Website

3. Please check each FTA funding program that currently funds your agency.

☐ Section 5311

☐ Section 5310

☐ Section 5307

4. Please list all counties in which your public transportation services are provided.

5. Do you currently have route(s) that can be considered intercity feeder service (as defined above)?

☐ Yes

☐ No



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6. Please list the cities/stops served by your feeder services (as defined above) where you connect with intercity bus routes.

1	<input type="text"/>
2	<input type="text"/>
3	<input type="text"/>
4	<input type="text"/>
5	<input type="text"/>
6	<input type="text"/>
7	<input type="text"/>
8	<input type="text"/>
9	<input type="text"/>
10	<input type="text"/>

7. Has COVID-19 impacted this service in any way?

☐ Yes

☐ No

If "yes," please explain this service impact, including financial impact.

8. What do you view as the primary purposes of the passenger trips in your feeder service?

9. What is the average monthly ridership on your feeder service (as defined above)?

10. What is the general age and employment status of your passengers on these services?

☐ Employed

☐ Unemployed

Average Age

11. Is there a demand for intercity bus service to destinations that you do not currently serve or expansion of current service?

☐ Yes

☐ No

If "Yes," what are these destinations and/or service expansion needs?

12. Please identify route(s) by origin/destination pairs that could benefit most from the provision or improvement of services (e.g., new routes, increased frequency of service on existing runs, evening or weekend service)

13. Does your feeder service connect with private intercity bus service on either/both ends of the route?

☐ Yes

☐ No

If yes, please explain the connections:

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Intercity Bus Needs Assessment and Service Evaluation Update Public Transportation Providers Survey

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14. Are there existing intercity and public transportation services in your area that may be terminated due to lack of ridership?

☐ Yes

☐ No

If yes, what are these services?

15. Identify any intermodal passenger facilities that are needed in your area that could allow connections between local public transportation and intercity bus?

16. Including the need for intercity bus services (as defined above), what are the greatest unmet public transportation needs in your rural/regional area? (please prioritize)

1

2

3

4

5

6

7

8

9

10

17. What county/regional entities could benefit from being included in the discussion of intercity bus services in your area?

1

2

3

4

5

6

18. Please describe any intercity bus/feeder service needs that you have not addressed in an earlier question.