Autorité de Régulation des Transports

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République Française

Communiqué DE PRESSE

Paris, 28th September 2022

The "Macron" liberalised coach market grew in the first half of 2022, but did not reach its 2019 level

The first half of 2022 was a continuation of the second half of 2021, marking the recovery of the sector since the pandemic. Operators estimated that ridership in the third quarter of 2022 could return to its 2019 level, but the lack of drivers could hamper the future market growth.

IN THE FIRST HALF OF 2022, COACH TRAFFIC ON BOTH SUPPLY AND DEMAND SIDES REMAINED AT THE SAME LEVEL AS THE PREVIOUS SIX-MONTH PERIOD, SHOWING A STRONG INCREASE

With 162 French cities connected and 612 daily departures at the end of the second quarter of 2022, coach service supply increased significantly compared to the first half of 2021 but was still lower by around 20% than in 2019.

More than 3.3 million passengers were transported in the first half of 2022, reducing the gap with the same period in 2019 to about 30% (compared to more than 75% in the first half of 2021).

The average occupancy rate was high, returning to the high level observed in 2019. The level of competition between the two main operators regained what had been recorded before the pandemic, being even higher than the degree observed since the emergence of the FlixBus-BlaBlaCar duopoly.

RECORD REVENUE OF €5.5 PER 100 PASSENGER-KM IN THE SECOND QUARTER

According to the operators, this strong increase in revenue could be the result of higher demand but also higher production costs (fuel, labour, etc.). As a consequence, total revenue rose sharply in the second quarter of 2022 to approach[1] its level in the same period in 2019.

IN THE THIRD QUARTER OF 2022, THE NUMBER OF PASSENGERS COULD REACH THE SAME LEVEL AS IN 2019

Operators seem optimistic about the third quarter of 2022. The Authority's monitoring tends to confirm that the coach service supply in the third quarter of 2022 would continue to grow, although without reaching the level of 2019. Operators are also worried about the driver shortage which could hinder the future market growth.

For further detail:

- Open-access coach market analysis – First half of 2022 edition (in French)
- Press release in French

[1] Between €28 and €32 million.

About the French Transport Regulatory Authority (ART)

Since 2010, the French railway sector has had an independent authority to accompany its gradual opening to competition: the Autorité de régulation des activités ferroviaires (Araf). Law 2015-990 of 6 August 2015 on growth, activity and equal economic opportunity extended the regulator's powers to road activities - coach transport and motorways.

On 15 October 2015, Araf became the Autorité de régulation des activités ferroviaires et routières (Arafer), with the mission to contribute to the proper functioning of public service and competitive activities for the benefit of rail and road transport customers.

With competence for the regulation of airport charges since 1 October 2019, Arafer became the Transport Regulatory Authority (ART) on that date. Lastly, Law No. 2019-1428 of 24 December 2019 -mobility act- extended the Authority's powers and missions to the opening up of mobility and ticketing data, as well as to the regulation of infrastructure manager activities and security activities carried out by RATP in Île-de-France.

Its opinions and decisions are adopted by a college of five[2] independent members chosen for their economic, legal or technical skills in the field of digital services or transport, or for their expertise in competition matters. It is chaired since 4th August 2022 by Philippe Richert, Vice-President and Acting President.

[2] Law No. 2019-1428 of 24 December 2019 on the orientation of mobilities established a transformation of the governance of the Authority's college, which will gradually become five permanent members (the current temporary member will end his term of office and will not be replaced).