

# PRESS RELEASE

Paris, June 27<sup>th</sup>, 2023

## In 2022, the Macron coach market accentuates its post-Covid recovery, without returning to its 2019 level

*In its new report on the coach transport market in 2022, the French Transport Regulatory Authority (ART) notes that the number of passengers using liberalised coach services (LCS or "Macron" coaches) has not returned to its highest level since liberalisation (more than 10 million passengers transported in 2019). It has also noted a rise in fares, despite the positive effects on prices of the competition between the two operators, Flixbus and BlaBlaCar, and with high-speed trains services (HST). Finally, the ART's action has led to a 10% decrease in fares for access to stations and road facilities.*

**WITH LESS THAN 10 MILLION TRAVELLERS IN 2022, PASSENGER NUMBERS WILL ONLY RETURN TO THEIR 2018 LEVEL**

**The effects of the post-Covid recovery are only enabling the sector to return to the 2017 level of supply and the 2018 level of ridership.** Although up 77% year-on-year, by 2022 coach.km traffic is struggling to return to pre-crisis levels. The more dynamic recovery in demand means that by 2022 liberalised coach services will be carrying *\*between 7.8 and 9.3 million passengers\**<sup>1</sup>, an increase of more than 90% over one year, but still not enough to catch up with pre-crisis levels<sup>2</sup>.

**In economic terms, the timid recovery of supply, combined with dynamic demand, is boosting the occupancy rate to a level higher than before the crisis.**

**Average revenue per passenger per 100 km is also rising:** it stands at €5.8 in 2022, against €4.6 in 2019 and €4.8 in 2021.

<sup>1</sup> Data covered by business secrecy is blacked out in the form of ranges identified by asterisks.

<sup>2</sup> *\*Between 4 and 4.8 million passengers\** in 2021 and *\*between 10.3 and 11.3 million passengers\** in 2019.

## **COMPETITION BETWEEN COACHES AND WITH HIGH-SPEED TRAINS SERVICES MEANS LOWER AVERAGE PRICES FOR "MACRON" COACHES**

**For routes in competition with high-speed train services, operators' average revenue per 100 km is around €1.2 lower than for other routes; it is also €0.8 lower for routes in competition between coaches.** These positive effects of competition benefit almost 90% of passengers on the "Macron" coaches, who have an alternative transport offer by coach or train. The weight of these competing routes in the offer of the two national operators also shows a marked upturn in 2022 (+4 points for FlixBus and +11 points for BlaBlaCar).

## **IN 2022, THE REGULATORY ACTION OF ART LED TO A 10.3% DECREASE IN THE AVERAGE FARE FOR ACCESS TO STATIONS AND ROAD FACILITIES**

**The "Macron" coaches operated 279 road passenger transport facilities, around a quarter of which were subject to charges.**

**The tariff for access to these facilities is €5.21 per coach, 10.3% lower than in 2021.** This decrease is due in particular to ART's action, which led the operators of the Montpellier-Sabines and Paris-Beauvais airport coach terminals to lower their access charges by respectively 50% and 60%.

**The regulatory strategy adopted in 2020, which aims to focus ART's controls on the most frequently used facilities, has been reinforced by the results obtained:** at 31 December 2022, 82% of the regulated facilities had compliant access rules (tariffs in particular) (an increase of 3 points over one year).

### **For further details (in French)**

- [« Bilan de l'activité du transport libéralisé par autocar en 2022 » report](#)
- [Press release](#)
- [The Open Data dataset](#)

### **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 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.