

# PRESS RELEASE

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## Improving the quality of service at coach stations is crucial to the development of long-distance coach services

In its new [report on the coach services market in 2023](#), the French Transport Regulatory Authority (ART) observes that the long-distance coach market is well above its pre-crisis level, thanks to international passengers.

### **COACH STATIONS THAT ARE ESSENTIAL TO THE SMOOTH RUNNING OF THE MARKET BUT OFFER INADEQUATE QUALITY OF SERVICE**

The coach stations most frequently used by long-distance coaches or liberalised coach services (such as Flixbus or BlaBlaCar Bus) are mostly city-centre coach stations, well connected and often backed by a train station.

With more than 4 million passengers and almost 500 destinations served, the Paris-Bercy coach station is still the busiest in France and the one offering the most destinations in 2023, followed by Lyon, Toulouse, Grenoble and Lille. Identifying viable alternatives to its announced closure<sup>1</sup> appears therefore to be essential for the smooth operation of the long-distance coach market.

Although coach stations essentially meet the main expectations of their users, half of the ten busiest French stations are far from having all the services or facilities that could reasonably be

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<sup>1</sup> A study led by the French Transport Regulatory Authority (ART) is currently underway on this subject, in association with all stakeholders ·

expected of a major coach station (waiting room for passengers, rest room for drivers, etc.). Improving the quality of service in coach stations is therefore a major challenge for the development of the sector.

### **PASSENGER NUMBER AT THE HIGHEST THANKS TO INTERNATIONAL PASSENGERS**

While the offer has increased over the year, it remains below pre-crisis levels (8 % fewer departures), even though kilometres covered by long-distance coaches are almost back to 2019 levels.

On the other hand, while domestic passenger number is stagnating compared to 2019, international passenger number is up sharply (by over 50 %): thanks to this dynamic, total passenger number is well above pre-crisis levels.

The rate of delays of more than 15 minutes increases by one point over the year to reach 21.5 % of coaches that travelled in 2023, a higher rate than for high-speed and Intercités trains (which stand at 11 % and 19 % respectively at the same 15-minute threshold in 2023).

### **REVENUE PER KILOMETRE ON THE RISE, WELL BEYOND INFLATION**

The sector's turnover is set to reach a record level of over €154 million, up by around 20 % on 2019, thanks to two factors. On the one hand, at an average of over 62 % in 2023, the occupancy rate for long-distance coaches remains very high throughout the year. On the other hand, in continuity with the high level observed in the 2<sup>nd</sup> half of 2022, the average revenue per passenger is growing faster than inflation and stands at more than 6 euros per 100 km in 2023.

In the last quarter of 2023, domestic routes in competition - i.e. operated by both operators at the same time - account for 69 % of departures and 93 % of passengers carried. This competitive intensity, which is comparable to that observed in 2018, just before the emergence of the duopoly, has not, however, resulted in fare moderation, with the gap between the average revenue on routes with competition and that on routes without competition (which is higher) narrowing.

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

- The report "[Rapport annuel sur le marché du transport par autocar et sur les gares routières en France en 2023](#)"

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### **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 ART'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 29 December 2023 by Thierry Guimbaud.