

Paris, 6 January 2017

Liberalised bus services has created a new demand for transport in France (Arafer survey)

According to initial public data from surveys carried out by the Rail & road regulatory body, Arafer, late 2016, 17% of "Macron buses" passengers would not have travelled in the absence of this new mode of transport, liberalised since summer 2015. An estimated 900,000 additional trips in one year. More than 40% of bus passengers have turned away from the car, including carpooling. 37% prefer bus to train (of which 24% to TGV), mainly for financial reasons.

What motivates the choice of bus travellers since the liberalisation of this mode of transport in August 2015? In order to shed light on the profile and behaviour of these new passengers, Arafer carried out field surveys between October and December 2016 ¹.

Today, it publishes the first key lessons learned from these surveys of 1,500 people who have travelled onboard "Macron buses".

- **Who travels by bus?** A customer base with modest incomes, young, of which 19% are students. The bus attracts relatively few retirees: 17% whereas they represent 28% of the French population over 18 years old. Bus customers travel mostly alone, several times a year to the same destination, for a private reason (visit family/friends).
- **Distribution network:** 97% of bus tickets sales is done on the internet. As soon as the market was liberalised, the operators chose to develop commercially thanks to the digital platforms.
- **The provision of "Macron buses" creates demand:** 17% of "Macron bus" users would not have travelled if this new mode of transport had not existed. This represents nearly 900,000 trips in one year, compared to the 5.2 million passengers carried from 30 September 2015 to 30 September 2016. ([latest quarterly report based on Arafer data collection –in French](#)). By way of comparison, the rate of induction of new traffic was 10% in Germany in 2015 (2 years after the liberalisation of the market outside the Rhine).
- **Liberalisation has the effect of significantly increasing the modal share of the bus services** on long distance journeys (of more than 100 km), from 2.4% in 2015 to 3.8% in 2016.

¹ 1476 people that had travelled on a "Macron bus" line were interviewed between October and December 2016: 452 by telephone, 689 by internet, 335 in the bus station. The base of answers provided by respondents of the 3 surveys was adjusted for the volume of traffic observed in the 3rd quarter of 2016 by type of link (radial/transversal) and distance category.

- **Switch from car to bus:** 25% of the travellers surveyed would have chosen carpooling (35% for 18-24 year olds) and 19% would have taken their private car if "Macron buses" did not exist. In total, 44% turned away from car use, including carpooling. This switch from the car to the bus is close to 60% for transversal connections of between 100 and 250 km.
 - **The rate of switching from TGV to bus is higher on journeys of more than 250 km:** overall, 37% of the respondents turned away from the train, of which 24% from the TGV (29% for journeys of more than 250 km), mainly because of the price effect.
 - **Bus services competes with the TGV on radial routes,** and the car on transversal routes: 31% of passengers switch from TGV to bus on the radial links, where the TGV well-established, compared with 16% on cross-connections, where there is little TGV. Conversely, the switch of car to bus is much stronger on the transverse routes (34%) than on the radial routes (7%).
 - **Price:** 80% of respondents consider the bus cheaper than the train, 63% consider it cheaper than carpooling.
 - **Services:** 62% find the bus more convenient than carpooling for luggage, 40% feel it is more comfortable and 47% safer than carpooling. On the other hand, the criterion of timetables is clearly not to the advantage of the bus, with it being less flexible than carpooling.
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- [Read the full results of the Arafer survey \(in French\)](#)
 - [Press release in French](#)

About Arafer

Since 2010, the French railway sector has had an independent regulatory body which accompanies its gradual opening to competition. The "Macron" Act of 6 August 2015 extends the powers of the regulator to road activities: coach transport and motorways.

On 15 October 2015, the rail regulatory body became the rail and road regulatory body (Arafer). Its mission is to contribute to the efficient operation of the public service and competitive activities for the benefit of rail and road transport customers. Its public opinions and decisions are adopted by a group composed of seven independent members chosen due to their expertise in railway, road, legal or economic matters or because of their expertise in competition matters and has been chaired since August 2016 by Bernard Roman.