

## Marktanalyse des Fernbuslinienverkehrs 2014

### Summary

In the context of the liberalisation of the coach transport market, the existing services of national long-distance bus lines were significantly extended since the beginning of 2013 with new lines from the current providers as well as from additional market participants. Initiated by the new opportunities resulting from the liberalisation of the market, market participants have succeeded in developing a comprehensive long-distance bus network across Germany in a very short period of time and have made the national long-distance bus services well-known to a wide range of users.

Liberalisation

Today, the range of national long-distance bus transport is largely concentrated on a few operating companies. On the one hand, this concerns the established operating companies Berlin Linien Bus GmbH and Deutsche Touring GmbH. On the other hand, there are many new market participants, including the young competitors DeinBus.de GmbH, Flixbus GmbH and MFB MeinFernbus GmbH. As an additional market participant Deutsche Post Mobility GmbH with ADAC Postbus also entered the coach transport market. With IC Bus, Deutsche Bahn AG is represented with a new service on the market as well. Due to the involvement of its subsidiaries in Berlin Linien Bus GmbH, Deutsche Bahn AG is among the established market participants. While Megabus, a British operating company, actually shows interest in participating in the German coach transport market, the National Express Germany GmbH abandoned its services of City2City.

Operating  
companies

All these operating companies offer a long-distance bus network within Germany together with a number of medium-sized bus companies. The cooperation between operators and bus companies is based on different business models, which is reflected in the share of the risks covered by the bus companies. The offers provided by individual medium-sized bus companies, who mainly operate as a niche supplier of individual lines, are comparatively low. This also includes the providers of airport shuttle services established before the liberalisation.

Business  
models

The operating companies, which are often supported by financially strong corporations or investors, are exposed to high competitive pressure. The competition, which market participants increasingly describe as “extreme” is mainly reflected by low fares and the pace of newly added routes and stops are added to the existing networks. At the current stage it can be observed an extension of services abroad as well as the establishment of night and express lines. The services of domestic long-distance bus transport currently

Market trends  
today...

consist of 240 routes with 7,088 trips per week. There are also approximately 30 routes for airport shuttle services. The long-distance bus services are mainly concerned with inter-city links but services in tourist regions are included as well.

From the perspective of the market participants, the expansion of routes and connections will continue until at least the turn of 2014/2015. After which only a few individual new lines will be anticipated before a final stage can be reached within one or two years. Perspectively, the market participants interviewed by the Federal Office expect that an oligopoly with two to four providers will emerge on the supplier side. Currently the beginning of the first stage of market consolidation seems to be emerging. With City2City, the first major operating company withdraws from the market in October 2014.

...and in the future

According to the preliminary results of the Federal Statistical Office, the long-distance bus services in 2013 were used by 8.2 million passengers. This was an increase of almost 180% compared to 2012. For long-term projections, a transport volume of 25 million passenger journeys is predicted in 2030.

Volumes and projections

The number of passengers or the utilisation of vehicles in service is now influenced by a variety of factors. Operating companies offer a high number of inexpensive deals through various marketing channels that appeal to different user groups. Due to the existing remuneration agreement the majority of bus companies can offer their own services cost-covering not later than the introductory period. However, for a large part of the operating companies and the autonomously providing bus companies, the current offer regularly constitutes a subsidised business.

Cost effectiveness

The rapid growth of the long-distance bus segment is due to a substantial proportion of the new opportunities that open up for quick marketing via social media or networks. In addition, the operating companies take advantage of a variety of other opportunities to market its own offers. The fact that the needs of all potential user groups can be met is especially important for the general success.

Social media

Today's user groups of long-distance bus lines in particular include price-conscious travellers under the age of 35 (with a high percentage of women), who predominantly travel alone and for private purposes. In addition to a high proportion of students, there is also an increasing proportion of older costumers.

User groups

Due to the cheap fares, long-distance buses have so far competed with personal motorised transport, particularly with providers of car sharing services. In consequence of growing publicity and persistently low prices, however, an increasing proportion of customers of rail transport services opt for long-distance bus services. Another large proportion of passengers had not demanded national long-distance journeys before the market liberalisation.

Customer base

The newly created competition as part of the liberalisation of the coach transport market is especially experienced by long-distance rail transport. Private providers of long-distance rail services as well as Deutsche Bahn AG are responding to this by adjusting the price structure and termination of services.

Competition for rail transport

In order to satisfy the demand for drivers operating long-distance bus services, numerous new employees with predominantly fixed-term contracts were hired. This will be enhanced by the employment of temporary workers. The availability of the drivers seems to be dependent on the respective amount of the remuneration based on collective agreements as well as on numerous other factors such as the attractiveness of the lines or the working conditions in the company.

Coach drivers

On the one hand, long-distance bus drivers have to meet the general legal conditions in their daily work. On the other hand, they also have to represent the operator organisations. Thus, the drivers are in a constant area of conflict between the requirements and wishes of the employers and customers. Depending on the individual operating conditions, this has the potential risk of health problems.

Requirements

In addition to the police and the occupational health and safety authorities, the Federal Office for Goods Transport is responsible for monitoring the compliance with driver regulations if they are carried out as part of roadside inspections. The complaint quota for the inspections of driver regulations carried out by the Federal Office in the first half of 2014 amounted to 8.79%.

Roadside inspections

While the general trends, such as the demographic change and the use of environmentally friendly mobility services, point towards further growth of the sector, the market participants also identify numerous factors that could slow down further development, such as the situation at the bus stops.

Trends

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