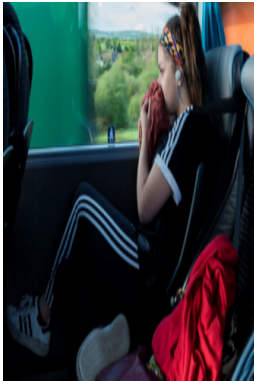


## 1. Projects



# The "Macron buses," a low-cost mode of transportation put to the test of sustainability and desirability

Finished research  
Begin: October 2018  
End: August 2019

Facilitating travel for all while simultaneously limiting CO<sup>2</sup> emissions: that was the goal of Macron's 2015 law liberalizing the market of intercity buses. But what has actually come of it? This research explores how this new market evolved within the transportation system and seeks to understand who the users of the Macron buses really are - what are their motives, their practices, their representations and their experiences. The goal: identifying the extent to which this low-cost transportation can be a part of the transition towards sustainable and desired lifestyles.

### Research participants

- Sylvie Fol
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## I. The research

In 2015, the Law on Growth, Activity and Equality of Economic Opportunities (the so-called "Macron Act") was adopted, allowing France to develop a private market for long-distance intercity passenger transport. This new transportation offer by private operators was announced as being inclusive and

sustainable. It was indeed supposed to improve the mobility of working-class people and inhabitants of areas with poor rail network services, as well as generally offering an alternative mode of transport to individual cars. Four years on, how has the system fared with regards to these goals? Has this new mobility offer found its users? How is it used? Can it be an offer that is both economically viable, socially desirable and environmentally sustainable?

To answer these questions, the Mobile Lives Forum launched a research project with a group of Master's students from Université Paris 1 Panthéon-Sorbonne. After reviewing the existing literature, the students conducted a quantitative and qualitative survey to study how these buses meet the passengers' expectations and fit into their travel practices.

The students chose to focus on three routes corresponding to three major French geographical areas, so as to cover a wide variety of lines and serviced cities, all the while including trips that are competing to various degrees with existing passenger train routes. Each route was taken twice, and a classic three-phase research method was implemented: observation, questionnaires and interviews.

During the observation phase, carried out in stations and on buses, researchers systematically recorded the number of passengers, the buses' level of cleanliness, comfort, etc. Then, during each trip, questionnaires were handed out to passengers, asking them about their identity, their representations with regards to buses and their mobility practices. At a rate of about 20 questionnaires per bus, a total of 674 were collected. In addition to the questionnaires, 46 semi-structured interviews were conducted with passengers who appeared to be most interested. These interviews, which lasted between 15 minutes and 2 hours, provided a qualitative understanding of the physical and social trajectories of these travelers. Six more informal interviews with bus drivers were conducted.

To quantitatively analyze the identity of the travelers who responded to the questionnaires, the students conducted a Multiple Correspondence Analysis (MCA). Finally, summary sheets with a homogeneous format were written to process the qualitative data obtained by the interviews.

## **II. The results**

### **1. The bus, a service that has found its place in France's way of life**

#### **• A useful mobility offer**

##### **An offer that gradually interconnects the country**

When this market was opened, operators concentrated on populated and attractive territories: at the end of 2015, 44% of services concerned large and medium-sized cities (regional or departmental prefecture) and tourist areas. They then quickly opened many services in smaller towns and promoted cross-city routes

#### **Notes**

1 in 2018, small towns represented more than half the locations served by buses, compared to only 20% at the start. This bus offer thereby complemented the rail network in certain territories.

The sharp rise (+72%) in the use of sub-regional routes between 2016 and 2017 led operators to develop routes of under 100 kilometers: in 2018, they accounted for 34% of journeys, compared to only 14% at the start. Among these short journeys, airports are a growing destination: in 2017, they accounted for a quarter of the intended small-distance trips reported to ARAFER <sup>2</sup>. For these routes which are relatively poorly serviced by public transport, the buses not only fill a need from users, they also offer the added practicality of not having to leave a car at the airport.

#### **A low-cost offer that is chosen mainly for its price**

As this bus market is meant to offer “accessible transport to all,” <sup>3</sup> low prices are central to its existence. In fact, cost is the first factor of choice for almost 75% of respondents. As a result, many users are willing to compromise in order to travel cheaply: 80% of them plan to continue using buses provided the prices remain stable, and 9 out of 10 passengers are strongly opposed to any upgrade in comfort levels for this reason.

#### **But also a flexible, convenient, relatively comfortable and easy to use transport option**

In addition to servicing many destinations, Macron buses are a particularly flexible transport mode, offering a variety of schedules and online booking methods that appeal to many users: 29% of them report that schedules are among their first factors for choosing the bus. Secondly, many also appreciate their practicality and relatively comfortable service (onboard Wi-Fi, convenient pick-up and drop-off points, etc.): for almost a quarter of users, comfort appears as the second criterion for choosing the bus. Indeed, even if the quality of service does not match the standard available on trains, for the vast majority of users, it's good enough given the price.

Finally, as they connect many points with direct routes, buses meet a demand from users for simplicity, especially retirees who may find trains hard to navigate (searching for the right platform, the right car, the right connections which are sometimes hard to find, etc.) ; buses are often less numerous than trains at stations and at stops, making them easier to find.

For all these reasons, buses have won over many users, even beyond the categories of people that the law was intended for.

#### **• Beyond the young and the poorest, there are diverse profiles and uses**

##### **Unexpected profiles compared to what was intended in the law**

The law's expectation was that the bus market would meet the demand of “younger users as well as those who are most sensitive to the cost of transport.” <sup>4</sup>

Indeed, on the one hand, users aged under-26 are over-represented among bus users (51%), while low income or otherwise precarious workers who are potentially among the “most sensitive to the cost of transport” are relatively numerous too (18%). But on the other, beyond these expected profiles, there is a non-negligible amount of graduates (24% having at least a Master's degree, and more excluding students) and even some executive level workers (10%). Moreover, while these buses were also

supposed to benefit pensioners, who have greater time flexibility and a limited budget, their numbers are relatively small (9%).

The study identified 5 categories of users with very different profiles:

- High school students (9.4%): Mostly minors and still living with their parents, they travel mainly for recreational purposes. For them, buses are an affordable mode of transportation for their first independent trip.
- Students (36.6%): They are very mobile, poorly motorized, they have time flexibility and a limited transport-budget that leads them to choose buses or ridesharing, which are more affordable than trains. They travel by bus for their studies, to visit their loved ones and to make regular trips between a place of study and a family home.
- Low-income workers (17.6%): This group is made up of people with little mobility, who are poorly motorized and have a limited travel-budget. Nearly half of the respondents in this group are foreign. They use the bus mainly to visit their loved ones.
- Workers with a university degree (27.7%): Aged between 25 and 55, they have a university degree, are employed and paid a salary, which means their travel budget is relatively big. They alternate between using the buses for professional and recreational purposes. Because their budget allows them to choose other modes of transport, the price is less important to them than to other categories of users; they also choose the bus for reasons of practicality (for example, to get to an airport without having to leave a car on site) or flexibility.
- Pensioners (8.7%): Comprised of people over the age of 55, this group is characterized by occasional bus use, even though most of them own a motor vehicle. They appreciate buses because they're easy to use and friendly, and they use them mainly to visit family, but also for leisure.

#### **Mainly recreational uses**

The majority of bus users travel for recreational purposes, i.e. to see relatives (68%) and for leisure-related activities (29%). Trips motivated by a person's job (7%) or studies (12%) are less common.<sup>5</sup> Differences can be observed depending on user categories. Most students travel for recreational purposes, while workers with a university degree are more likely than others to use the bus for professional reasons (16%). As for low-income workers, they travel mainly to visit their relatives (65%) – the same as with pensioners (64%).

#### **• An offer that facilitates user mobility and meets aspirations**

Just as the 2015 law anticipated, these buses have a double impact: they “facilitate the development of accessible transport” and “promote mobility.”<sup>6</sup> Low prices allow many users to travel by reducing the financial constraints that would otherwise restrict their ability to travel. More than 65% of users say that these buses make it easier for them to get around, and the interviews that were held confirm that low prices enable users with a limited travel-budget to be mobile. From this point of view, buses are an inclusive and accessible option for a majority of French people.

Additionally, it provides users who are already highly mobile with even more options, as evidenced by the interviewed students. This bus option has thus led to an increase in travel; 40% of users say they travel more often since using this service.

For most users, this change in mobility practices meets their aspirations; indeed, for 56% of them, the possibility of moving more easily thanks to the bus is considered a gain in terms of freedom.

## **2. What is the sustainability of this mode of transport in terms of social, economic and environmental issues?**

####• The other side of the low-cost system

### **An offer that is partly constrained**

The choice of traveling by bus is not disconnected from what other modes of transport are available and their respective pros and cons. 52% of users report that if they had the opportunity, they would have taken the train instead. Buses therefore seem to have been chosen by default, instead of another faster but less affordable mode of transport. Indeed, bus journey times are much longer than those of trains: for example, a Paris-Rennes journey takes about 5 hours by bus, compared to 1 hour and 30 minutes by train. In addition, the level of comfort in buses is often lower: the spacing between seats is tighter, the Wi-Fi doesn't always work, nor do the toilets... As for the bus stations and bus stops, the quality of amenities and equipment is much poorer than at railway stations: stops are often limited to a simple sign, they are sometimes difficult to spot, basic services (wind-shelters, toilets) are often non-existent... Buses therefore look like another travel class to those already available, perpetuating a highly segmented transport system that doesn't allow everyone to benefit from the same level of service.

### **UA system that doesn't benefit everyone: people living in scarcely populated areas are kept away**

Moreover, despite a strong presence across the country, not everyone has easy access to these bus lines. 69% of bus users are city dwellers living in major or medium-sized cities. And despite the demands made by some MPs during the parliamentary debates surrounding the law in 2015, individuals living in sparsely populated areas have not really benefited from this new travel option. Indeed, the network of routes is driven by profitability goals and is therefore often at the expense of areas where demand is considered insufficient.

####• An economic model that seems to be a source of instability

### **Towards the end of competition and rising prices?**

The liberalization of bus transportation has created a very competitive market between operators, which in the first years allowed for very low prices. But while there were 5 operators competing for the market in 2015, within less than a year (July 2016), there were only 3 main operators left. And with Flexibus buying out Eurolines/Isilines in April 2019, there are now only 2 companies left on the market, Flexibus and Ouibus, which will become BlaBlaabus following the sale by the SNCF of its subsidiary BlaBlaCar. Competition is therefore progressively weakening, which could eventually lead to a monopoly. In this context, we can wonder whether prices will really remain low, which is the main factor enabling this whole system to work.

### **A platform system that puts subcontractors under pressure but that isn't always cost-effective**

These companies now function with a platform model through which they manage the marketing, communications and distribution together, piling pressure on their subcontractors: companies that buy the vehicles and incur part of the operational risk, often to the detriment of their employees' working conditions. Some of the drivers in this study criticize the fact that they have difficult schedules, excess working hours that cause fatigue and put their passengers at risk, and low wages, amongst other issues. The drivers' working conditions vary however depending on the subcontracting companies that employ them.

Despite this distribution of tasks, it seems that Flixbus and Blablacar are still not profitable as bus transport services and the continuation of this activity depend on investments that are now made at a loss. All this raises issues relating to the system's stability and the conditions under which it could sustain itself in the long run while maintaining cheap prices.

### **A potential source of instability for local public administrations**

Furthermore, unlike trains, buses use an existing infrastructure that is maintained by local public administrations. Given the cost of infrastructure maintenance <sup>7</sup>, it's worth questioning whether the low cost offered by these companies really corresponds to the true cost of this mode of transport. To compensate the loss in public money, one option would be to tax these buses, which would undoubtedly lead to an increase in the price of trips.

The loss for local public administrations may even get worse with the development of routes under 100km, that could destabilize the publicly contracted transport system. Currently, according to ARAFER, there is no real alternative to the TER (local regional trains) because of the ability of AOTs (French transport organization authorities) to seize the authority if a competing connection is made that could damage the economic balance of the existing public service. But the recent development of many medium-distance connections makes us wonder what consequences that may have on public services. We can imagine a competition between a service that is subsidized by the government, which means public money, and a service financed by private investors that uses public infrastructures.

#####• What does the future hold for a low-cost mobility system given the current environmental issues?

Buses are a more sustainable form of public transport than individual cars. It is therefore positive to note that 16.8% of users report driving their cars less often since these buses were introduced. However, this declared modal shift needs to be put into context, as according to the research, buses claim twice as many of their passengers from train users as they do from motorists: in fact, 34.6% of users indicate that using buses has led them to take the train less often. In addition, the modal shift of people opting for the bus instead of their car seems to have decreased between 2016 and 2017, whereas the modal shift coming from trains seems to have increased. <sup>8</sup>

### **CO<sub>2</sub>/km emissions per passenger for different modes of transport:**

- 213g CO<sub>2</sub>/km per passenger for a car with a lone driver.
- 71g CO<sub>2</sub>/km per passenger for a car with 3 people.
- 30g CO<sub>2</sub>/km per passenger in a bus which is 60% full (average by the students and figure by ARAFER).
- 18g CO<sub>2</sub>/km per passenger per km in a full bus.
- 7g CO<sub>2</sub>/km per passenger on a full train.

Moreover, while the environmental impact of buses is hard to establish precisely, this transport option seems to be particularly problematic insofar as it is part of a system that promotes mobility and therefore increases the total number of trips. Macron's law explicitly promotes "greater mobility." Consequently, as

noted above, more than 40% of users report traveling more since using the bus. This increased mobility also seems to bring about easier access to airports. Consequently, the results of the research force us to question the development of multimodal low-cost transport chains combining buses and airplanes, thus promoting an extremely problematic mode of transport from an environmental point of view.

Finally, in a context of resource depletion and climate change, is cheap oil-based mobility really a solution for the future?

## CONCLUSION

Macron buses respond to a demand from users who aspire to travel more easily and cheaply. In today's society, where mobility is valued and certain modes of transport are difficult to afford, this low-cost mobility service has a real purpose; it functions as a complementary transport offer to the existing options and mainly benefits young and low-income people.

However, what is the future of a mobility system that relies on an unstable economic model that leads to greater low-cost carbon-emitting mobilities, in a climate context that is forcing us to become aware of the costs of mobility and to reconsider the place we give to travel in our lifestyles?

Rather than enabling city dwellers, who are already the most mobile, to enjoy an even greater mobility for mainly recreational purposes, the goal of these buses could be redefined at least in part as an alternative to individual cars in scarcely populated areas. This could be implemented with the help of public subsidies, which would liberate these bus services from having to meet profitability targets and shift the focus to servicing neglected territories.

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### The case of Spain: a contractual system worth imitating?

In Spain, buses have historically occupied a particularly important place in the supply of intercity transport for travelers. According to Eurostat, the modal share of passenger-kilometers for buses averaged 13% between 1990 and 2016, compared to 7% in Germany and 6% in France and the United Kingdom.

This transport offer is structured around a system of monopoly concessions to private operators, granted for a journey or a group of journeys by the State or by the regional authorities. These contracts define the itinerary of the routes, the location of stops, the frequency of journeys, the maximum level of prices... The system's performance and profitability rests on the fact that any given concession contains both highly profitable and less profitable routes, allowing it to service the entire country. For companies, the monopolistic situation they enjoy allows them to secure the profitability of their activities. Furthermore, since concessions generally have a minimum duration of 10 years, operators also have time to turn a profit on all the necessary investments they have to make.

This example shows that it is possible to develop an efficient intercity bus passenger network by using private operators and still relying on the State's control of the market.

Source: Modal distribution of passenger transport, Eurostat, consulted on 9/01/2019.

### III. To go further (in French only)

Students Synthesis

Mobile Lives Forum's Synthesis

Report. Tome 1

Report. Tome 2

Appendices

Interviews

1 A cross-city route is a connection linking two regional cities, as opposed to a radial route (Paris-Region).

2 The Autorité de Régulation des Activités Ferroviaires et Routières (ARAFER) is a french government agency which regulates rail and road transport.

3 Act No. 2015-990 of August 6, 2015 Law on Growth, Activity and Equality of Economic Opportunities, Explanatory Statement, General Orientation.

4 Act No. 2015-990 of August 6, 2015 Law on Growth, Activity and Equality of Economic Opportunities, Explanatory Statement, Title I, Chapter I.

5 Respondents were given the opportunity to report several reasons for their trip.

6 Act No. 2015-990 of August 6, 2015 Law on Growth, Activity and Equality of Economic Opportunities, Explanatory Statement, General Orientation.

7 In 2016, the use of road infrastructures by buses represented an estimated public cost of 15,6 million euros, including 11,7 million paid for by the State and 3,9 million by the departments, according to a study by Bruno Cordier (ADETEC), "Dépenses publiques occasionnées par les services librement organisés d'autocar (« cars Macron »)" ("Public expenditure caused by the freely organized bus services - "Macron buses"), Association Qualité Mobilité, December 2018.

8 According to a study by Bruno Cordier (ADETEC), "Dépenses publiques occasionnées par les services librement organisés d'autocar (« cars Macron »)" ("Public expenditure caused by the freely organized bus services - "Macron buses"), Association Qualité Mobilité, December 2018.

#### **Mobility**

For the Mobile Lives Forum, mobility is understood as the process of how individuals travel across distances in order to deploy through time and space the activities that make up their lifestyles. These travel practices are embedded in socio-technical systems, produced by transport and communication industries and techniques, and by normative discourses on these practices, with considerable social, environmental and spatial impacts.

En savoir plus x

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## Lifestyles

- Alternative mobilities
- Diversity of lifestyles
- Leisure & tourism
- Work

## Policies

- Public transport

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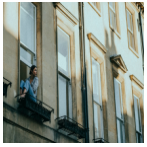
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