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Rapid Growth of Intercity Coach Services

Traditionally, state-owned railway systems in Europe were protected from competition by regulations that prevented coach operators from establishing rival services.

The role of coach companies was confined to providing feeder routes to and from railheads or operating in more sparsely-populated areas not served by the railways. In fact, even some of those operations were owned and controlled by railways.

Where intercity coach services were permitted, they were often controlled by a system of regulation, establishing routes, fares and frequencies, and approved by the railway companies. They often had the right to object to any proposed new service that they thought would abstract passengers from them.

The first major change occurred in the United Kingdom when long distance services, over a minimum 50km, were de-regulated from the autumn of 1981. That led to a dramatic improvement in the standards of coaches, with the introduction of features like air conditioning, reclining seats, double glazing, air suspension, higher power and an altogether more pleasant travel experience.

On most routes, coaches were not as fast, point-to-point, as trains, but they offered a guaranteed seat and knowledge that luggage was safely secured in lockers under the vehicle’s floor. On quite a number of cross-country routes away from the main railway lines, coaches provided fast services without the inconvenience of changing trains in mid-journey.

Intercity coach travel appealed strongly to passengers who were more concerned about price and security of luggage than overall journey time! The Nordic countries were quick to embrace intercity coach travel and Spain soon followed. In that latter country, franchises were awarded on a route-by-route basis, often with contracts of sufficient duration to justify investment in new coaches. In Spain, many excellent high speed rail routes radiate from Madrid, but cross-country travel requires coaches.

A few years ago, the European Union decided that intercity express coach services should be established throughout the EU, offering competition to the rail networks. Germany started to open up in 2013 and France finally passed the necessary legislation at the end of July 2015. The result has been strong demand for intercity coach services, particularly in Germany and into neighbouring countries.

Two main types of operations have emerged. The first is where the entire operation is owned by the operator, including all the coaches. The largest and best example is megabus.com, owned by Stagecoach Group of the United Kingdom. Megabus.com runs services not only in the UK but Belgium, France, Germany, Italy, Netherlands and Spain. Megabus.com also has an extensive network in the United States. Most of their vehicles are very high capacity, mainly over-deck or double-deck, enabling the maximum number of passengers to be carried on each route. Separately, Souter investments, owned by the founding family of Stagecoach, has established similar operations in Poland, Finland (majority shareholding), Estonia and New Zealand.

The other main type of operation is typified by National Express of the United Kingdom. While they own some coaches, their main responsibility is to establish networks, schedules, fares and booking systems. Many of their services are provided by contractors whose vehicles are in National Express colours and to their specifications.

They are paid an agreed rate per mile with National Express taking the risk on the number of passengers per journey. That has also proved to be a very successful model.

The German market is an unusual challenge. The country has no single dominant city hub like London, Paris or Madrid. Some operators tried to get going on individual routes, but lacked recognition from the travelling public and withdrew after losses.

Deutsche Post and ADAC combined to run a small network, but the latter soon withdrew. The two largest, Meinfernbus and Flixbus, soon combined, but they used the National Express model of hiring vehicles from established coach companies. Although they have tried to standardise on high specification vehicles, including double-deck Setra coaches, they lack flexibility in operation and cannot achieve very high vehicle utilisation of competitors like megabus.com. One great benefit of the latter is that they use only a very small number of vehicle types, so their drivers rapidly acquired familiarity and confidence with each type of vehicle in the fleet.

Intercity express coach services initially appealed to people who were primarily cost-conscious. The coaches have developed dramatically and more modern models now offer facilities such as free WiFi and sockets for recharging computers and mobile phones. Therefore, they are now attracting business travellers, who can work on board without the hassle of driving.

In the United States, megabus.com has found that on journeys of up to 400 miles, from city centre to city centre, coaches are competitive with aircraft. By the time passengers travel to an airport, check in; go though security procedures, wait to board an aircraft, then travel from the destination airport to the city centre, there is little difference in time.

Long distance coach travel is already well-established in other parts of the world. It is a major business in Mexico and much of South America. The Indian market is growing rapidly following the development of major inter-city highways. It is popular in China where levels of car ownership are still very low. Another strong market is Turkey where the rail network is sparse, but coaches are fighting competition from low-cost internal airlines.

Intercity coach travel looks like having a very bright future.

Megabus Sleeper Coach

Megabus.com

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National Express Coach

Polski Bus