Selected recent statistics on

bus and coach

transport in Europe

A study by NEA Transport Research and Training, commissioned by the IRU

Geneva, June 2006

Union Internationale des Transports Routiers

SELECTED ROAD TRANSPORT DATA

A study to update road transport statistics in Europe

Final report on passenger transport

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1 INTRODUCTION

1.1 Objective of the study

The International Road Transport Union has asked NEA Transport research and training to update a number of tables and figures in the 1999 IRU/NEI report on productivity in road transport. Beyond updating statistical information on the road transport of goods, as presented in the IRU/NEI 1999 study, NEA has been requested to add, to the extent possible and depending on the information available, similar information on passenger road transport by bus and coach (scheduled and unscheduled).

This report contains the results for passenger road transport.

1.2 Methodology

Notwithstanding the fact of the increasingly integrating EU road transport market, timely, business friendly and comparable transport statistics at European level are not easy to collect, especially for road passenger transport. The obligation for EU Member States to collect statistics on the road transport of goods is covered by EU Directives, for road passenger transport however, such an EU obligation does not exist.
Furthermore, statistics on other related issues like size distribution of companies, profitability, bankruptcy and other indicators of the performance of the sector are missing on a European level.
Therefore in this study data is collected by surveys among IRU Member associations and national Ministries of Transport from ECMT member countries.

As far as bus and coach transport is concerned, additional data was collected by a short survey among participants of the 4th European Bus & Coach Forum, Kortrijk, Belgium, on the 21st of October 2005, and by desk research. Sources checked include other NEA reports and studies, EUROSTAT, ACEA, ECMT, Central Statistical Bureau NL and ERF.
Where relevant and available, information on bus and coach transport in the US and Canada has been added in order to make a comparison between Europe and North America[1].

This report contains the results of the study for passenger road transport. In the tables and graphs a distinction has been made as much as possible between EU15 (the “old EU” countries), EU8 (the new Member States with the exception of Malta and Cyprus), and Non-EU countries (such as BG, RO, RUS, UA, SCG).

[1] The data covering North America (US + Canada) has been taken from the study “Motorcoach Census 2000” by R.L. Banks & Associates for the American Bus Association.

1.3 Questionnaire response

Table 1.3.1 shows the response of the survey among IRU Member Associations. Not all questionnaires returned were complete.

Table 1.3.1: *Survey response IRU members*

Goods transport		Passenger transport	
1	BE	1	BE
2	BG	2	BG
3	CZ	3	CZ
4	DE	4	DE
5	ES	5	HU
6	HU	6	LT
7	LT	7	MK
8	NL	8	RO
9	PL	9	TR
10	RO	10	UK
11	RUS	11	FIN
12	SE	12	AT
13	UK	13	CH
14	SCG	14	FR
15	UA	15	NL

Table 1.3.2 shows the response of the survey among Ministries of Transport in ECMT Member States received in time.

Table 1.3.2: *Survey response ECMT Member States*

Goods and passenger transport	
1	ES
2	NL
3	SK
4	EST
5	HR
6	IS
7	LV
8	DE
9	UA
10	SE
11	LT

2 PASSENGER ROAD TRANSPORT

2.1 Introduction

Statistics on passenger road transport on a European level are rare. The main reason for this is that, contrary to the road transport of goods, there is no EU Directive that imposes an obligation on EU Member States to collect this data and submit the results to the European Commission. As a result passenger road transport seems statistically speaking almost non-existent.

In the Netherlands, where the Central Statistical Bureau stopped collecting data on road passenger transport by bus and coach in 1998, the association "Koninklijk Nederlands Vervoer" (KNV) took the initiative to fill the "data-gap" on passenger road transport. KNV started in 2003 with a survey among its members, and has since been regularly publishing information on Dutch passenger road transport. Similar initiatives, although in somewhat different forms, have been taken by other bus and coach associations in Europe. In annex 1 a description of the Dutch system is presented, an example of the survey sent out to members of KNV is shown, and some statistical results of this KNV initiative are presented.

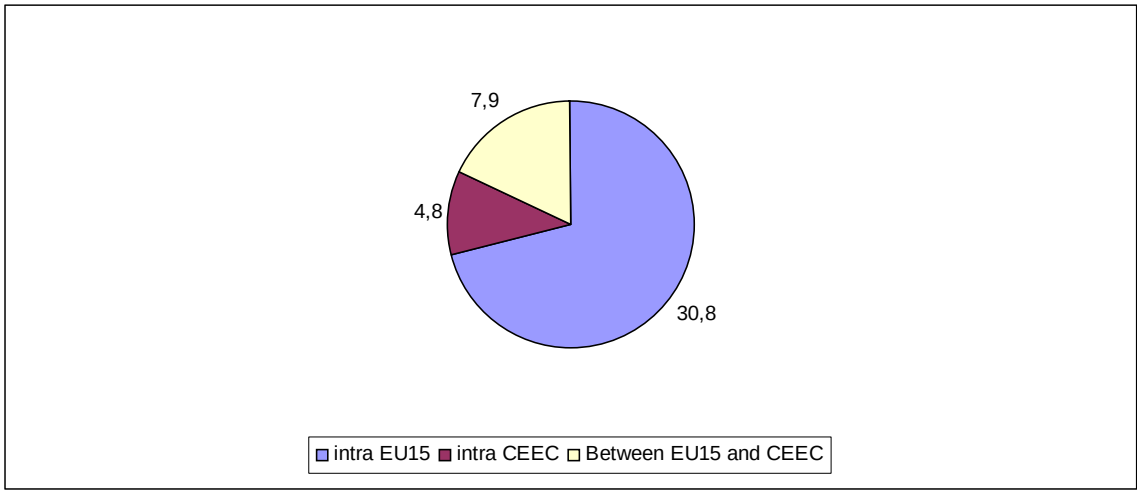
For this study, an attempt was made to collect data using questionnaires sent to IRU member associations and national Ministries of Transport of ECMT Member States. Both scheduled and unscheduled bus and coach transport have been covered. Where relevant and available, information on bus and coach transport in the US and Canada has been added in order to make a comparison between Europe and North America[2].

2.2 Volume of international passenger transport by road

Figure 2.2.1 and figure 2.2.2 give an impression of the volume of passenger transport in terms of passenger kilometres and number of passengers. This information was derived from the NEA TEN-STAC study carried out for DG-TREN in 2004/2005.

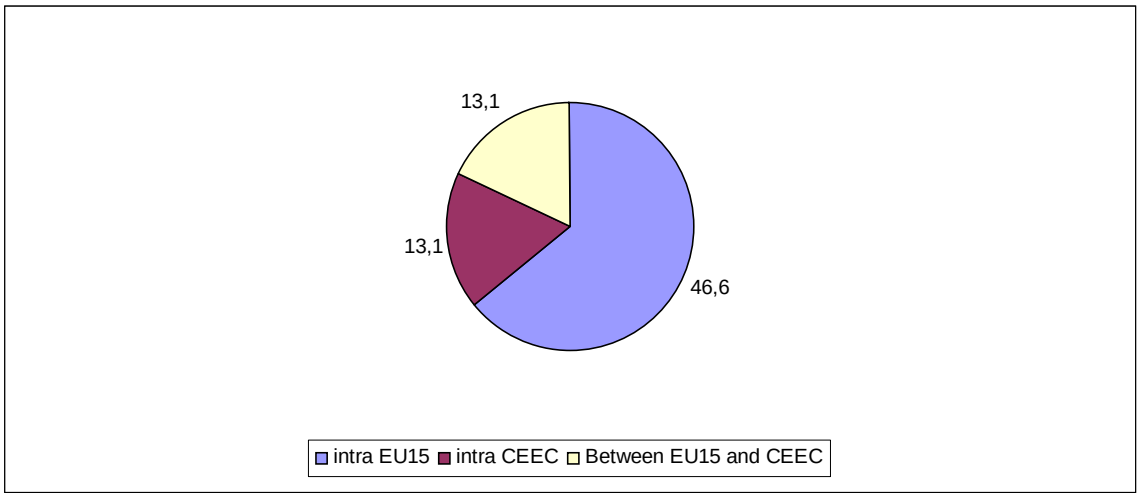
[2] The data covering North America (US + Canada) has been taken from the study "Motorcoach Census 2000" by R.L. Banks & Associates for the American Bus Association.

Figure 2.2.1 *Volume of international passenger transport by bus and coach (billion passenger kilometres), 2005*



CEEC: EST, LV, LT, PL, CZ, H, SK, SLO, BG, RO
Source: TEN-STAC study results

Figure 2.2.2 *Volume of international passenger transport by bus and coach (number of passengers, millions), 2005*



Source: TEN-STAC study results

Notwithstanding the fact that because of the lack of data on passenger transport much of the results of the TEN-STAC study, and therefore also the data used for the two figures, were compiled using computer models. The figures show that within the EU15 46.6 million passengers used bus and coach transport for international trips, amounting to 30.8 billion passenger kilometres. In total 72.8 million passengers accounted for 43,5 billion passenger kilometres.

The data covering North America (US + Canada) shows that in 1999 about 860 million passengers were transported by bus and coach.

2.3 Modal split and competition in passenger transport

Despite the lack of complete and up-to-date passenger transport statistics table 2.3.1 shows the modal split in passenger transport over a number of years. Passenger car transport is the dominant mode with a market share in 2002 of 82.5%, followed by bus and coach transport (9.5%) and railways (6.8%).

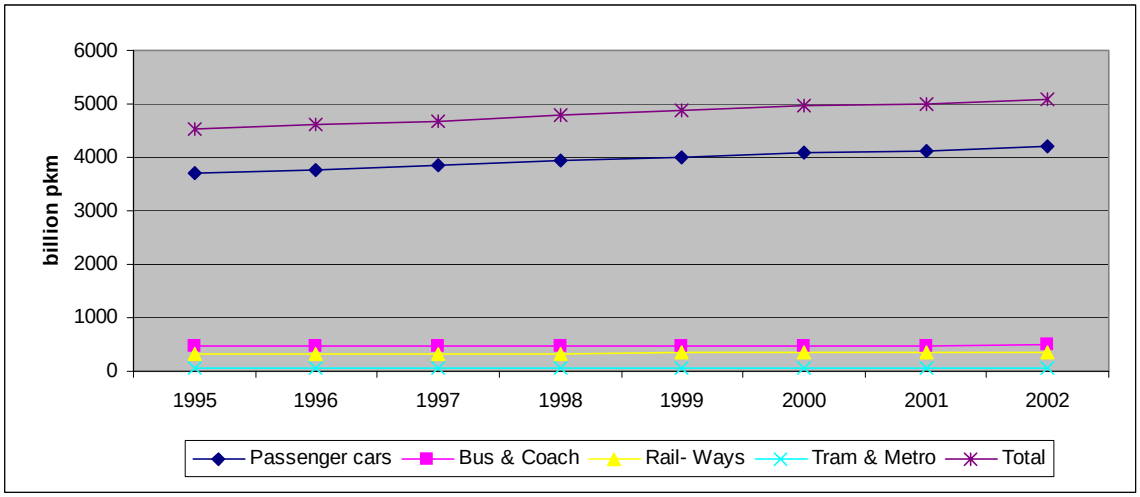
Table 2.3.1: *Transport of passengers per mode in EU25, billion pkm*

	Passenger cars	Share %	Bus & Coach	Share %	Rail-Ways	Share %	Tram & Metro	Share %	Total
1995	3703	82	462	10	319	7	51	1	4535
1996	3774	82	467	10	325	7	52	1	4618
1997	3844	82	467	10	327	7	52	1	4690
1998	3932	82	474	10	329	7	53	1	4788
1999	4009	82	476	10	339	7	55	1	4879
2000	4074	82	480	10	346	7	56	1	4956
2001	4118	82	483	10	348	7	57	1	5006
2002	4203	83	486	10	346	7	57	1	5092
95-02	+14%		+5%		+9%		+13%		+12%
P.a.	+1.8%		+0.7%		+1.2%		+1.7%		+1.7%

Source: European Commission, ERF

The table shows that in the period 1995 to 2002 the number of passengers using bus and coach transport showed lower growth rates than the other modes of transport. Especially transport by private car and transport by train and metro showed strong growth figures. Figure 2.3.2 shows the information in a graph.

Table 2.3.2: *Transport of passengers per mode in EU25, billion pkm*



Competition

To get an impression of the current competitiveness of the different modes in passenger transport, a small number of European bus and coach operators, mostly offering scheduled services, were asked to indicate the competitive strength of other modes of transport compared to their own sector. Each competitive mode was rated on a scale of 1 (no competition) to 10 (extremely strong competition). Table 2.3.3 gives an overview of the results.

***Table 2.3.3**: Rating of competitive strength of other modes*

Competitor	Rating
Private cars	6.50
Railways	6.00
Low cost airlines	8.25
Coach operators from EU15 countries	5.25
Coach operators from EU10 countries	5.00
Coach operators from Non-EU countries	3.25

The table shows that low cost airlines are considered the most important competitor in bus and coach transport. This could be related to existing distortions of competition between modes in terms of VAT, mineral oil taxation and various kinds of subsidies[3]. Competition from other bus and coach transport operators in the EU25 is not seen as a big problem, and competition from Non-EU countries seems almost lacking.

2.4 Size distribution in European bus and coach transport

Table 2.4.1 shows the questionnaire results regarding size distribution in domestic scheduled and unscheduled bus and coach transport in selected European countries. Unfortunately not all returned questionnaires gave adequate information on size distribution, and not all countries responded. However, the table seems to give at least some indication of size distribution in European bus and coach transport.

[3] For example, long-distance coach operators pay duty on the fuel used in their vehicles and VAT on turnover, whereas airlines pay neither. Private coach operators also compete against directly subsidized state-owned railways and indirectly subsidized low-cost airlines.

Table 2.4.1 *Size distribution in scheduled and unscheduled domestic bus and coach transport, number of companies per size category[4], 2004*

	Size categories on basis of number of busses/coaches								
	1 vehicle	**%**	**2-10 vehicles**	**%**	**11-50 vehicles**	**%**	**>50 vehicles**	**%**	**Total nr of companies**
LT	64	32	88	44	47	24	0	0	199
ES	720	17	2461	60	826	20	108	3	4115
SK	489	62	272	34	26	3	4	1	791
LV	46	42	24	22	31	28	9	8	110
MK	53	56	38	40	3	3	0	0	94
LU	0	0	10	34	16	55	3	10	29
TR	0	0	333	55	249	41	21	3	603
BE	86	19	296	65	73	16	0	0	455
D	0	0	12012	73	3654	22	809	5	16475
RO	993	40	1263	51	207	8	19	1	2482
UK	566	10	3584	64	1236	22	242	4	5628
HU	131	30	227	51	44	10	42	9	444
CZ	1083	36	1795	59	132	4	33	1	3043
Total	4231	12	22403	65	6544	19	1290	4	34468
Average		26		50		20		4	

Source: questionnaire among IRU member associations and national ministries of transport

Overall some 26% of the companies have only one bus or coach, 50% of the companies have 2 to 10 vehicles, 20% has 11 to 50 vehicles and 4% has more than 50 vehicles.

Table 2.4.2 shows some results regarding size distribution in international scheduled and unscheduled bus and coach transport.

Table 2.4.2 *Size distribution in scheduled and unscheduled international bus and coach transport, 2004*

	Size categories on the basis of number of busses/coaches								
	1 vehicle	**%**	**2-10 vehicles**	**%**	**11-50 vehicles**	**%**	**>50 vehicles**	**%**	**Total nr of companies**
LT	132	45	147	50	13	4	1	0	293
ES	253	17	895	60	298	20	45	3	1.491
UA	44	31	96	69	0	0	0	0	140
SK	426	60	254	36	24	3	2	0	706
HR	129	36	200	56	25	7	4	1	358
LV	104	50	97	46	9	4	0	0	210
MK	22	17	60	47	45	35	0	0	127
LU	4	17	15	65	4	17	0	0	23
TR	0	0	107	79	28	21	1	1	136

[4] AFTRI, the French association reported 1359 enterprises without a vehicle, 57 enterprises with 1 to 10 vehicles, 210 enterprises with 11-50 vehicles and 1724 enterprises with more than 50 vehicles. This structure differs greatly from the information of the other countries.

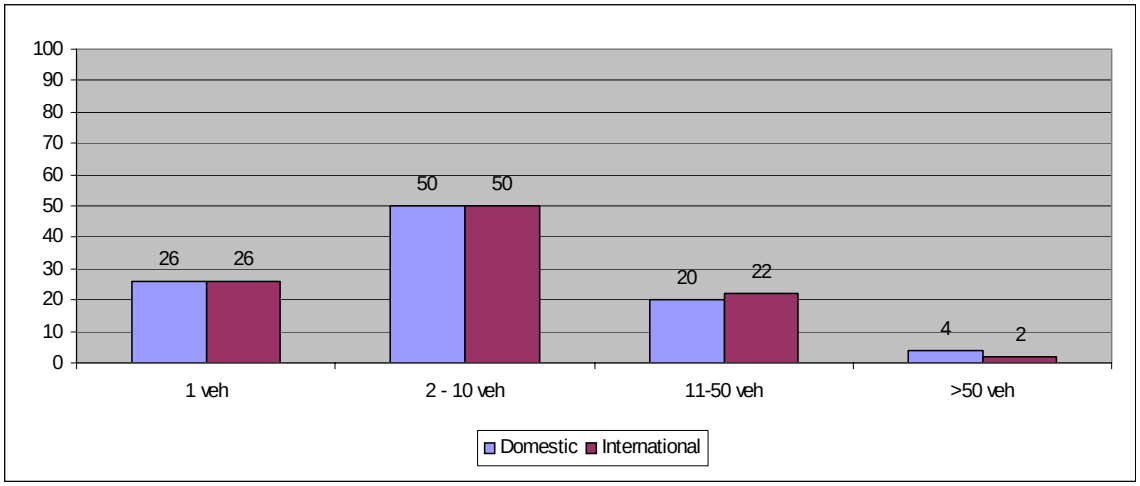
RO	895	41	1.098	51	161	7	18	1	2.172
UK	188	7	1.389	54	806	31	180	7	2.563
BG	0	0	63	10	572	90	0	0	635
HU	0	0	97	30	190	58	39	12	326
CZ	902	43	1.120	53	77	4	21	1	2.120
Total	3.099	27	5.638	50	2.252	20	311	3	11.300
Av.		26		50		22		2	

Source: questionnaire among IRU member associations and national ministries of transport

Despite the fact that not all countries reported data on size distribution, the table gives a good indication of the industry structure. Overall some 26% of the companies have only one bus or coach, 50% of the companies have 2 to 10 vehicles, 22% has 11 to 50 vehicles and 2% has more than 50 vehicles. The size distribution is quite similar to the size distribution in domestic transport.

Figure 2.4.3 shows the percentage share of the different size categories in scheduled and unscheduled domestic and international bus and coach transport.

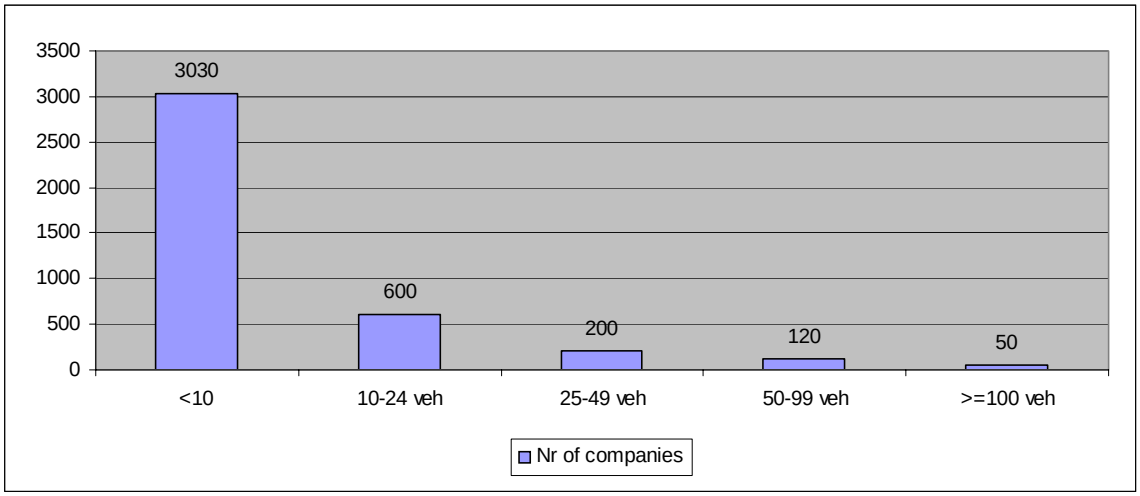
Figure 2.4.3 *Average size distribution of companies, active in scheduled and unscheduled domestic and international bus and coach transport, 2004*



Source: questionnaire among IRU member associations and national ministries of transport

Figure 2.4.4 shows size distribution in North America (US + Canada). It is estimated that in total around 4,000 companies are active in the commercial transport of passenger operated motor coaches, defined as a vehicle with a minimal length of 35 feet and a minimum carrying capacity of 30 passengers. The figure shows that most companies have less than 10 buses. It was estimated that about two thirds of the companies with less than 10 buses have only one to four buses. The figure shows that, as in Europe, the industry is dominated by relatively small operators.

Figure 2.4.4 *Size distribution in motor coach transport in North America (US + Canada), 1999*



2.5 Cost comparison EU8 / EU15 / CEE passenger transport

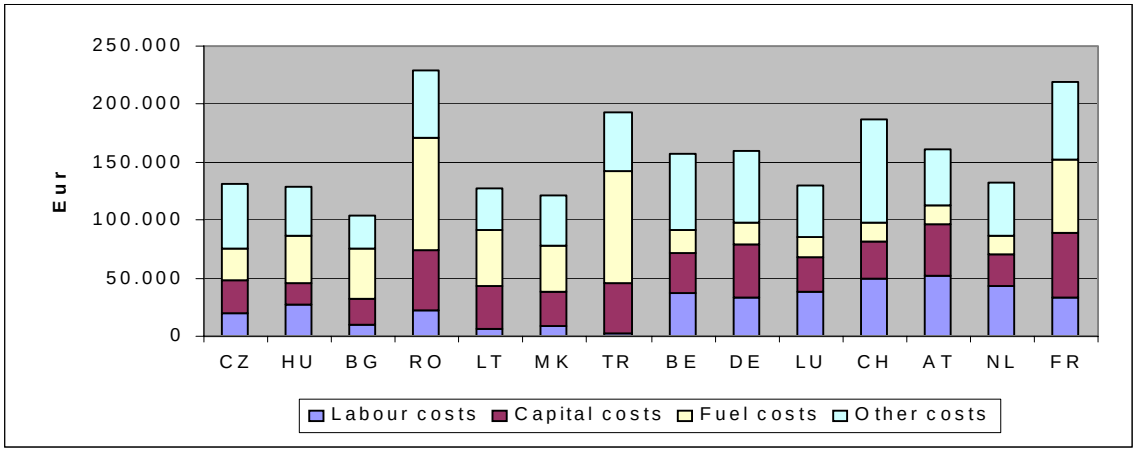
Figure 2.5.1 shows total costs and cost structures in international road bus and coach transport. This information was collected by sending a questionnaire to IRU member associations. In some cases missing data was estimated. Furthermore, in a number of cases the information was checked and sometimes adapted on the basis of additional information obtained from participants of the 4th European Bus & Coach Forum Kortrijk[5].

The results are presented using four cost categories:

- Labour costs (driver wages including social costs and reimbursed expenses)
- Capital costs (costs of depreciation and interest costs of vehicles)
- Fuel costs (including excise duties)
- Other costs (insurance, vehicle tax, repair and maintenance, tyres, overhead)

[5] Interviews were carried out with bus and coach operators, who took part in the 4th European Bus & Coach Forum (Kortrijk, Belgium, on the 21st of October 2005), devoted to international regular services in Europe. Therefore, most of the operators' answers reflected the situation in scheduled bus and coach transport.

Figure 2.5.1: *Total costs and cost structures in international bus and coach transport, scheduled and unscheduled, 2004*



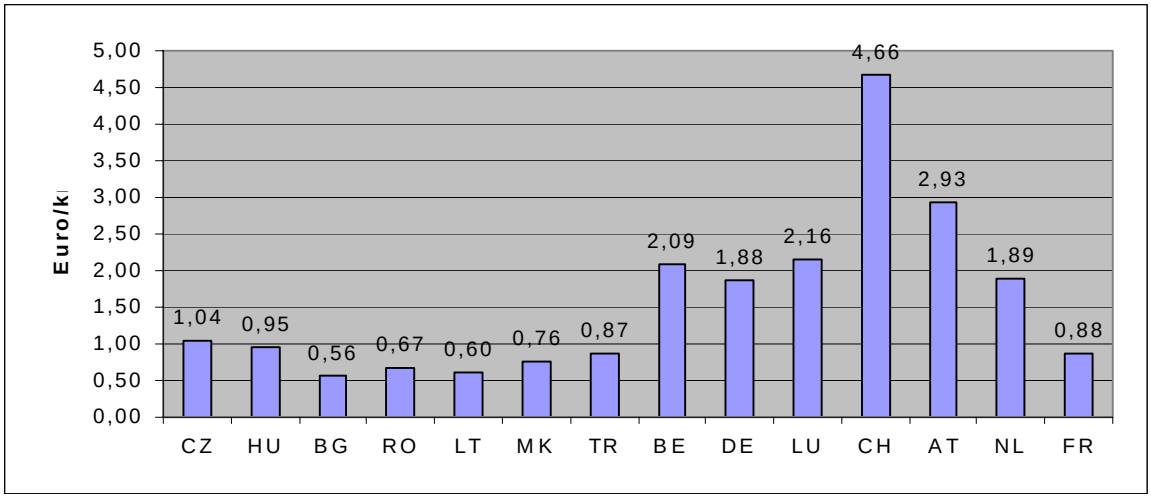
Source: Questionnaire filled in by IRU members associations

Since the total yearly costs depend strongly on the number of kilometres, table 2.5.2 shows the reported yearly kilometres while the figure 2.5.3 shows the costs per kilometre.

Table 2.5.2 *Yearly kilometres in international bus and coach transport, scheduled and unscheduled, 2004*

	CZ	HU	BG	RO	LT	MK	TR	BE	DE	LU	CH	AT	NL	FR
Km/year x 1000	126	135	185	343	210	160	222	75	85	60	40	55	70	250

Figure 2.5.3: *Cost per kilometre in international bus and coach transport, scheduled and unscheduled, 2004*



The reported yearly kilometres in passenger coach transport show much more variation between countries than for instance in the road transport of goods. The relatively high total costs of Romania are directly related to the large number of kilometres reported, while the high costs of Switzerland are directly related to the relatively low number of kilometres.
Overall, costs in the EU15 countries seem quite high compared to costs in the CEE countries. The relatively high costs of drivers are the main cause.

The study covering North America (US + Canada) indicates an average number of yearly kilometres of about 50,300. The next table gives an overview of the main findings of the study in North America.

Figure 2.5.4 *Main findings study on motor coach transport North America (US + Canada), 1999*

Motor coaches operated	Nr of carriers	Motor coaches	Passengers (millions)	Kilometres (millions)	Litres (millions)	Employment (thousands)
100 or more	50	11,200	485	1,267	701	39
50-99	120	7,500	136	663	359	25
25-49	200	6,400	59	662	349	19
10-24	600	9,100	86	829	405	41
Less than 10	3,000	10,000	97	848	455	66
Industry totals	4,000	44,200	863	4,269	2,269	190

2.6 Profitability

Through the survey, IRU Member associations were asked about profitability in international bus and coach transport with a possible distinction between scheduled and unscheduled transport. The results were quite disappointing, indicating that most of the associations do not have information about the profitability of their members.
The response received seems to indicate that bus and coach transport is quite profitable in Non-EU countries like Bulgaria, Romania, Turkey and Russia. Reported figures by associations vary from 7% to 20% profits as a percentage of turnover. In the EU25 profit levels seem much lower. The few received quotes vary between 0% and 5%. The relatively high reported profitability in Non-EU countries could be related to the fact that the figures include scheduled bus and coach transport. As a matter of fact, the average profitability of the bus and coach sector in the US ranges between 1% and 2%[6].

[6] Source: Presentation of the American Bus Association at the IRU CTP meeting, Dubai, March 13th 2006.

In general profitability in the sector, at least in Western Europe, is problematic. The main reason for this is relatively easy access to the profession and to the market, which drives firms to expand fleets immediately when they see a market upturn. Such an expansion of fleets then contributes to overcapacity, leading to a drop in price levels.
Furthermore, though large firms do have economies of scale, they lack flexibility regarding the utilisation of their fleets, and a negative development in one or two market segments could easily put large firms in trouble. Smaller firms are more flexible, and are able to switch between different markets segments better.
Recent years have also brought fierce competition for Western European companies from CEE firms in the market segment of international European roundtrips.

Additional to the update of the NEI figures, minor research was also carried out regarding profitability and bankruptcies in other sectors compared to goods and passenger road transport. Because of the availability of data the research was focused on the Netherlands.

Table 2.6.1: *Profitability in other industries, profit as a percentage of total turnover, 2003*

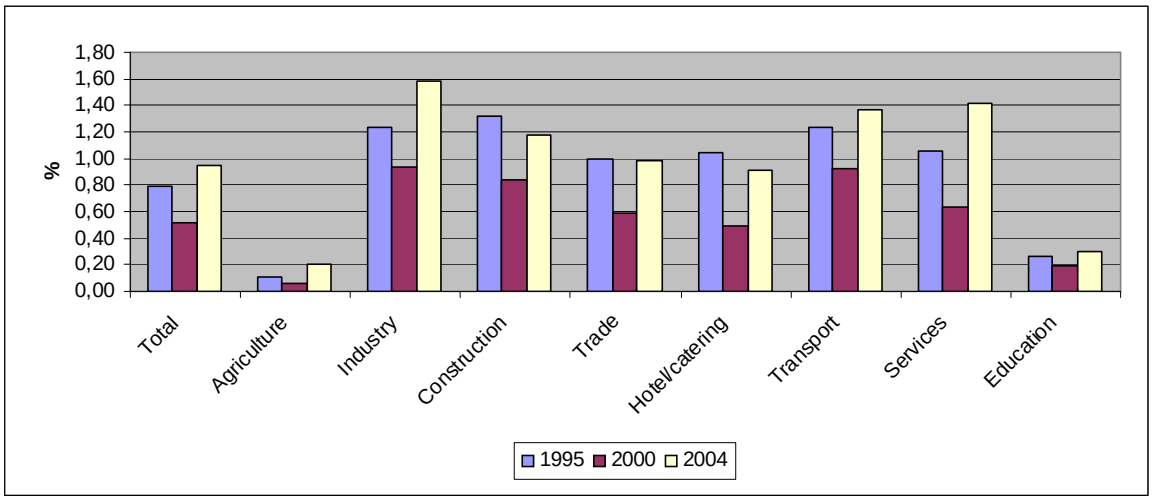
Manufacturing, office machines	-3,17		Manufacturing, paper etc	5,05		Manufacturing, chemical products	7,28
Manufacturing, transport equipment	1,36		Manufacturing, cars.	5,10		Architecture, engineering	7,51
Travel agencies	1,70		Retails, books	5,18		Hotels etc	7,84
Import passenger cars	1,73		Employment agencies	5,28		ICT	8,20
Fuel service stations	1,75		Local express / mail services	5,38		Retail, car parts	8,27
Air transport	2,02		Manufacturing, textiles	5,63		Other business services	9,24
Car dealers	2,61		Retail, furniture	5,77		Restaurants	9,92
Retail, household appliances	2,95		**Trams, buses & coaches**	**5,98**		**Taxi companies**	**10,35**
Super markets	3,11		Retail, other	6,04		Advertising agencies	11,69
Retail, food	4,00		Retail, cosmetics	6,09		Market survey	14,51
Sea transport	4,42		Construction / installation	6,19		Textile cleaning	17,07
Freight forwarding.	4,70		Retail, non-food	6,69		Accountancy	17,28
Manufacturing, metal	4,71		Retail, clothing	6,71		Telecommunication	18,62
Manufacturing, food	4,77		Manufacturing, furniture	6,71		Airports and related	18,75
The road transport of goods hire & reward	**4,90**		Warehousing	7,08		Inland waterways	19,59

NB. NEA calculations for the road transport of goods show a profitability in 2003 in the Dutch domestic road transport of goods for hire and reward of – 0.5%, and in the Dutch international road transport of goods for hire and reward of -2.0%. The difference is caused by a different methodology (calculation of costs of equity, calculation of costs of personnel not included on the pay-list, recalculation of reward for entrepreneurship), and caused by the fact that the official CBS figures include only larger companies.

2.7 Bankruptcy

Short research was carried out on bankruptcy rates in the sector (goods & passenger) in the Netherlands. Figure 2.7.1 shows the number of bankruptcies as a percentage of the total number of companies active in the corresponding sector.

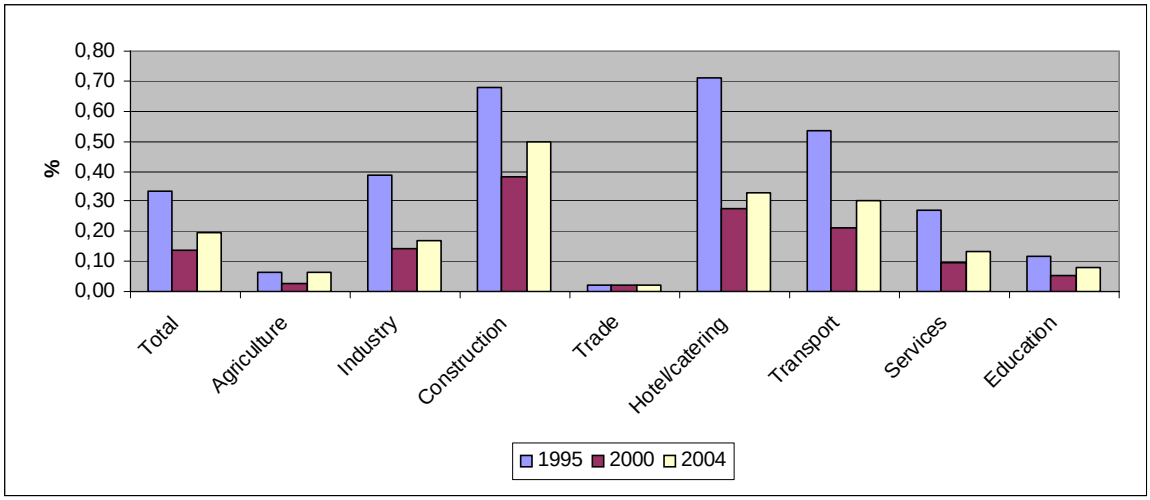
Figure 2.7.1 *Bankruptcies as a % of the total number of companies active in a sector, NL*



Source: CBS

Figure 2.7.1 shows that the number of bankruptcies in transport as a percentage of the total number of companies active in the sector is higher than the average, but in 2004 this figure was higher for the sectors Industry and Services.

Figure 2.7.2*: Bankruptcies of one-man businesses as a % of total companies active in the sector, NL*



Source: CBS

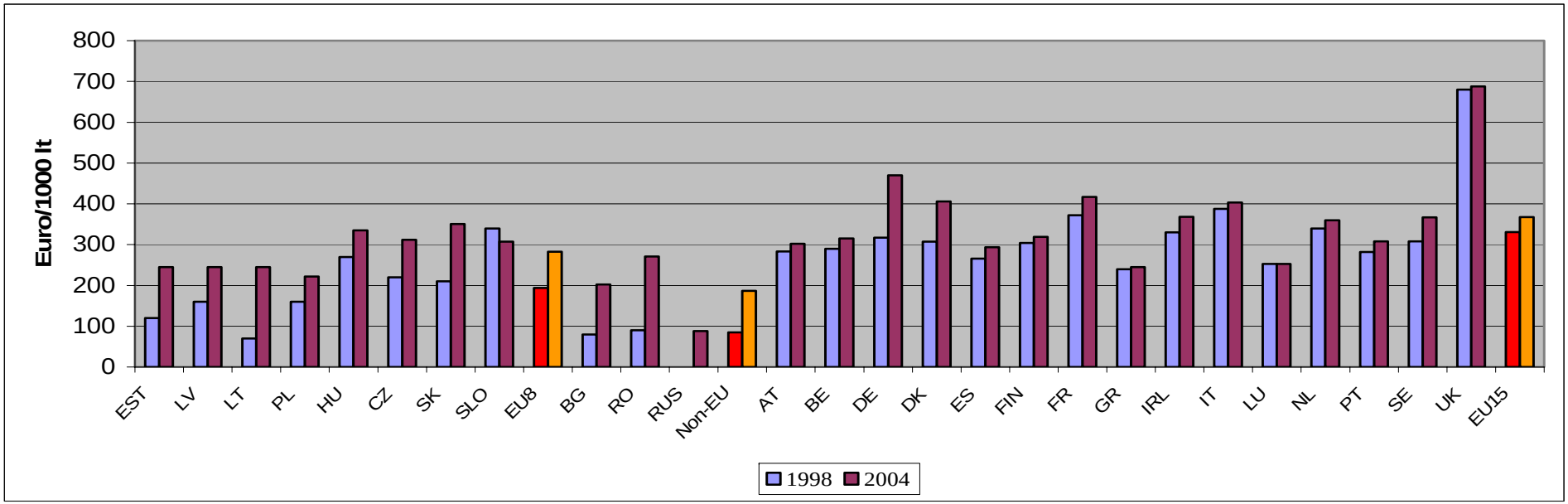
Figure 2.7.2 shows that the number of bankruptcies in transport as a percentage of the total number of companies active in the corresponding sector is relatively high, but lower than in the construction and the hotel/catering sector.

The comparison with other industries shows that profitability in transport is relatively low and bankruptcy relatively high, but the figures don't show that the economic situation in the sector is much worse than in other sectors.

2.8 Diesel fuel taxation levels

Figure 2.8.1 shows the excise duty on diesel in Euro/1000 litres taken from the NEI report 1998 (CEEC) supplemented with data on the EU15 countries on the basis of TLN reports in 1998, and data taken from ACEA showing the situation in May 2004. The figure shows diesel fuel taxation has been harmonised to some extent, with still higher rates in the EU15.

***Figure 2.8.1**:Excise duty on diesel, Euro/1000 litres, 1998 and 2004.*



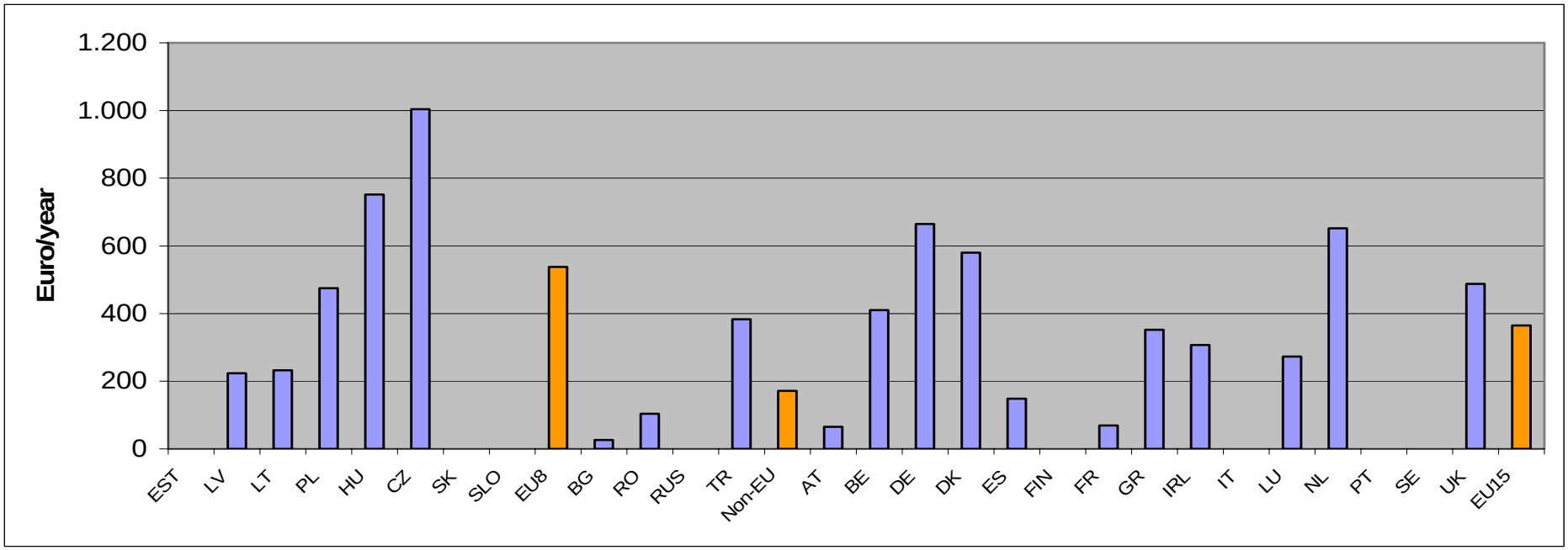
Source: NEI report, Questionnaire, ACEA

2.9 Annual taxation on coaches

Figure 2.8.1 shows annual taxation levels on coaches in 2004, taken from the questionnaire, and supplemented with data taken from ACEA[7] showing the situation in May 2004. The figure shows higher levels in the EU8 countries, and lower levels in Non-EU countries.

[7] ACEA = European Automobile Manufacturers Association

Figure 2.8.2: *Ownership taxation per year for a 12m coach, 2004*



Source: Data is derived from the questionnaire and the ACEA Tax Guide 2005.

2.10 Role of the coach in the economy: some additional facts & figures

2.10.1 Recent study of the of the American Bus Association (ABA) on the economic and social impact of bus and coach transport

The American Bus Association (ABA) has recently released a study[8] on the structure and the economic and social impacts of the bus & coach transportation service industry in the US. According to the study, the industry consists of nearly 4,000 mostly small businesses, three-fourths of which operate fewer than 10 vehicles. Nearly half (41%) operate fewer than five vehicles. Operating a total fleet of more than 44,000 vehicles, the industry provides charters, tours, sightseeing, airport shuttles, commuters, and scheduled services.

The study shows that the bus and coach industry in the US:

- Is the most fuel efficient: bus & coach fuel consumption per passenger miles is lowest - 0.0068 gallon per passenger mile in 2001, which was 76% lower than air carrier and passenger car fuel consumption — and declining. Energy intensity is lowest - 946 Btu per passenger mile in 2001, which was one-fourth of the energy intensity of air carriers and passenger cars.
- Is the safest mode of travel: Among all passenger transportation modes, the bus & coach fatality rate is lowest — 0.4 fatality per 100 million vehicle miles. For passenger cars the fatality rate is 3.5 times higher.
- Serves more residents than any other mode: For 14.4 million rural residents, buses and coaches are the only available mode of intercity commercial transportation service.
- Serves the public without any cost to taxpayers: Unlike the industries of its competing modes, the bus and coach industry has received virtually no federal subsidy after accounting for its federal cost responsibility and the user fee payments to the federal government by the industry and its passengers. Other modes received at least 14 times more subsidy per passenger mile.

2.10.2 Recent figures from Spain

Similar observations can also be found in a number of studies on the European bus and coach sector. A study executed for ASINTRA, the Spanish Federation of Bus and Coach Operators, shows that:

[8] Impact of Motorcoach Industry on Society and Environment, An Industry that binds the Nation together, Nathan Associates submitted to the American Bus Association, January 2006.

- in Spain about 60,000 buses and coaches transport around 1,200 million passengers per year;
- bus and coach transport is relatively safe with only 3 victims in 2004;
- bus and coach operators invest around Euro 330 million each year to renew their fleets.

2.10.3 IRU study of 2001 on the role of the coach in the economy: conclusions and recommendations

- **Role in the economy**

Coach travel and coach based tourism play an important role in the economy and in the transport of people in the European countries. Coach travel has a share of 15% to 25% of the total passenger trips in the modes of collective transport and a share of 1% to 2% of the total number of passenger trips. If the modal split is calculated in passengers' kilometres the transport share of the coach is much higher, because the average trip length in coach travel is much higher than the average trip length of the total of all modes. Coach based tourism has a share of 0.3% to almost 2% of the total Gross Domestic Product and a share of 0.4% to 0.8% of the total employment in the European countries.

- **Modal split: role in collective transport**

In all European countries the role of the collective transport of persons in total mobility has been decreasing over the past few decades under the influence of the rapid increase of private transport, especially by car. At present in most of the countries the growth of car transport has reached its limits because of the detrimental effects on the environment, on traffic congestion, on the use of space and on traffic safety. The increase of collective transport is one of the possible solutions for a sustainable growth of mobility. Coach travel can offer an important contribution to this sustainable growth because of the specific advantages of these modes with respect to the costs, the flexibility, environmental and traffic safety.

- **Incentives, Infrastructure and Innovation**

The flexibility of coach travel means that the coach can be introduced relatively short term for offering collective transport to and from newly built districts, industrial areas, tourist attractions, etc. The coach does not need specific and expensive infrastructure; the infrastructure for the modes by rail and by air requires a long construction period, gives more and more difficulties to fit in densely populated areas and makes the modes vulnerable to changes in traffic flows.

Coach travel can be relatively easily adjusted to changes and trends and can develop new transport products according to new demands of travellers. This is illustrated by the use of the coach for the different travel purposes, trip lengths and types of travel, over which the coach shows the most equal spreading of the passengers' trips in most countries.

The branches of the coach tour operators, the coach travel companies and the coach manufacturers are dynamic, competitive and highly market orientated. In combination with flexibility this leads to the fact that coach travel products show continuous innovation and improvements.

- **Market segments and target groups**

Coach travel can focus on various segments in the tourist market and on different target groups, e.g. groups with special interests, hobby clubs, professional clubs, young people, singles, senior citizens, disabled people. In coach travel tailor-made travel products can be created for each of these target groups, better than in any other mode of transport. The tour operator and the coach travel company have to create adequate travel products that appeal to the wishes of the different target groups.

- **Social factor**

The social factor is equally important. In recent years people have learned to revalue the aspects of the human contact in a group of people with similar interests. In coach travel the social factor can be seen to its full advantage, more so than in any other transport mode. Therefore the tour operator and the coach travel company have to be aware of the social aspects and they have to compose the groups in harmony with the expectations of the travellers with respect to the groups.

- **Seat utilisation**

In coach travel high seat utilisation degrees of the vehicles can be realised because the passengers make a reservation in advance, so that the transport company can make an optimal planning of the utilisation of the coaches. A high utilisation of the vehicles contributes to lowering traffic congestion and to lowering the environmental impact. In the various types of travel one coach equals 20 to 40 cars. Of all modes, the coach has the lowest impact on the environment. The high seat utilisation is also one of the reasons that coach transport can offer low prices for the traveller. Through this coach travel is relatively invulnerable for declines in the economic situation.

- **Management information**

The differences in the market shares of coach travel and coach based tourism between the European countries as shown in this report indicate that the entrepreneurs in these sectors could learn from colleagues in other countries. In different countries there are “examples of good practice” in various fields that can show elements to the entrepreneurs where they can realise improvements, e.g. in the fields of the introduction of new technologies, the development and marketing of new products, access to new markets, quality rating schemes for the coach product, quality labels for coach transport companies, co-operation or mergers with other companies in the same or in other markets, financial and economic policy, bench marking, etc.

- **The role of the government**

Government policy is also important. The role of coach travel in collective transport is often underestimated by national, regional and local governments. As mentioned before, relatively low shares of the coach are often related with government policy as far as this gives priority and/or support to scheduled services, especially by rail and by air. National and local governments usually focus on rail systems when they are trying to find solutions in collective transport. As a result there is a distortion of competition between the modes. In contrast to this the governments should create incentives to expand coach travel in favour of the environment, traffic congestion and traffic safety.

- **Market conditions**

The figures in this report show that coach travel contributes considerably to the economy and that it is an important factor in mobility and in tourism, despite the lack of government promotion and support. Therefore the assumption can be made that if coach travel would be operated under conditions comparable with rail and air transport the role of the coach in mobility and in the economy would be much higher. Aspects of more equal operating conditions are: creation of a level playing field on taxation; use of existing free lanes and construction of new free lanes for buses and coaches in areas of traffic congestion; creation of better access and parking facilities in cities; giving incentives and promotion of coach travel.

- **General recommendation**

The general recommendation can be made that coach travel must be rated at its true values. It will then appear that promotion and support of coach travel is remunerative from the points of view of economics, environment, mobility and traffic safety.

ANNEX 1

Statistics on coach transport in the Netherlands

Background

From the '50's the Central Bureau for Statistics (CBS) in the Netherlands collected and published rather detailed data on coach transport. Due to the need of cutting costs this registration was discontinued after 1998. As a result, after 1999 figures on coach transport did not appear anymore in articles and policy documents. It seemed as if coach transport was no longer a factor of relevance in transport and mobility policy.

The sector organisation KNV Busvervoer (Royal Dutch Coach Transport), being very unhappy with this situation, tried to persuade the CBS and the Ministry of Transport to resume registration of coach transport data, but these attempts were in vain. Therefore KNV decided to make a registration of its own. The consulting firm NEA Transport research and training was assigned to carry out the statistical work.

Objectives

KNV Busvervoer has two main objectives for having these statistics produced. In the first place the data can be used to inform the politicians, policy makers and the public about the importance and the role of coach transport in mobility and about the contributions coach transport can offer to solve traffic congestion and environmental problems. In the second place KNV wants to have insight and to inform her members about developments of the volume and the turnover of coach transport in total and per market segment. This is a useful complement to the information that KNV provides about cost developments and cost prices of coach transport. Mr. Jacques Stokman, secretary general of KNV Busvervoer, annually publishes an article in KNVs magazine "Nederlands Vervoer" (Dutch Transport) about the main outcome of the statistics.

Approach

A selection of data was made that on one hand is relevant for KNV to have insight in the structure and the developments of the sector and on the other hand is common to the sector, is well understood by all companies and is being administered by most companies. Explanations are given with regard to data that might be misunderstood. The enquiry form is shown in Annex 1. "Serviced trips of more than one day" are including lodging, meals and sightseeing trips. "Shuttle trips" are direct trips to the holiday destinations without stopping for lodging. The enquiry forms are sent to the companies in February of each year when most coach companies have the required data already available. Most forms are received (by mail, fax or email) within two months, with a reminder after one month. Active support is given by the major supplier of specialised software for coach companies (having over 90 clients) in which a specially

programmed module provides the required data directly and without any further effort. To stimulate the supply of information all participating coach companies receive a gift.

Response

The first statistics were produced in 2003, containing figures over the year 2002. In total 49 coach companies had provided their figures (about 11% of all licence holders), representing 952 coaches (about 19% of all coaches). In 2004 an equal number of 49 companies co-operated in the enquiry, representing 1092 coaches and in 2005 the increased number of 57 companies provided the data with a total of 1396 coaches. This response is high enough for sufficiently reliable results. However, it is important to ascertain that certain large companies participate each year and to check the total results with the results of the companies that participated in two successive years.

One problem of a low response is that data about market segments that are served by only a few coach companies, tend to be unreliable. An example is the figure of the turnover of international scheduled line services. In 2002 a few companies that had a substantial turnover in this market segment participated in the enquiries but in 2003 only one company with a low turnover participated and in 2002 no companies having a turnover from international coach lines participated To increase the reliability of the outcome and to prevent situations as mentioned for the international lines, KNV will try to increase the response in the coming years.

Calculation on national level

The total data of the enquiries have to be raised to the whole coach sector on a national level. This calculation is made on the basis of the number of coaches. One problem is that the registration of the number of coaches by the Ministry of Transport is not fully accurate and should be improved for this purpose.

Results

In Annex 2 the results of the years 2002 – 2004 are presented. The table shows the transport quantities (number of coaches, kilometres, passenger kilometres), the turnover and a few indicators. The figures show an increase of the number of coaches and a decrease of the kilometres driven. Therefore the utilisation per coach (indicator 3) has decreased over these three years. However, the number of passenger kilometres shows only a small decrease. The average revenues per coach, per vehicle kilometre and per passenger kilometre have decreased under the influence of competition and decline of the economy. The percentage of coach companies that has acquired the Quality label for coach companies has increased strongly from the start of this label and is now at a high level.

Example of questionnaire used by KNV

1. Data of demand and supply	**Quantity**	
1a. Number of coaches in your company, average over 2004	……	
1b1. Number of kilometres driven in total by the coaches sub. 1a.	……..……....	
1b2. - of which: kilometres driven within the Netherlands	……	
1b3. - of which: kilometres driven abroad	……	
1c. Passengers average per coach	……	
or: Total passengers kilometres	……	
1d. Total litres of fuel tanked by the coaches	……	
2. Possession of Quality label Coach company	❑ Yes (please ❑ No mark)	
3. Turnover per category of transport (market segment)	**Amounts x € 1,- “)**	**% “)**
3A. Turnover of regulated transport		
3A.1 Transport of pupils and students to/from school	…….	……..
3A.2 Transport of workers to/from work	….……	……..
3A.3 Use of coaches for domestic scheduled line services	……..…	……..
3A.4 Total regulated transport	…….	……..
3B. Turnover of unregulated (tourist) transport		
3BI Turnover of day trips		
3BI.1 Rent of coaches to clubs, schools, companies, etc.	……..	…….
3BI.2 Rent of coaches for incoming tourism	……..…….	…….
3BI.3 Self-organised day trips	……..……	……..
3BI.4 Total day trips	……..	……..
3BII Turnover of serviced trips of more than one day (st>1day), shuttle trips, international scheduled services, incoming tourism		
3BII.1 Rent of coaches for “st>1day” to clubs, etc..	….……	……..
3BII.2 Rent of coaches for “st>1day” to tour operators	……..……	…….
3BII.3 Rent of coaches for shuttle trips to tour operators	……..……	…….
3BII.4 Rent of coaches for international scheduled line services	……..……	…….
3BII.5 Rent of coaches for incoming tourism to tour operators	……..…	…….
3BII.6 Self-organised “st>1day”, shuttle services, etc.	…….	…….
3BII.7 Total “st>1day”, shuttles, intern. lines, incoming tourism	…….	…….
3C. Turnover of the total company		
3C.1 Coach transport with own coaches	……..…	…….
3C.2 Coach transport with hired coaches	……..…	…….
3C.3 Total coach transport	……..…	……..
3C.4 Other activities	……..…	……..
3C.5 Total company	…….	100

‘) financial year 2004 or in case of a broken financial year, 2003/2004

“) you can also mention only the percentages of the turnover of the total company sub 3C.5.

EXPLANATION OF THE DATA

1.a. Number of coaches in your company, average over 2004

Coaches that have been in the company during only a part of the year are calculated for this part (e.g. a coach from the 1st of April to the 31st of December is 9/12 = 0.75 coach)

1b2. + 1b3. Kilometres driven in total by the coaches sub. 1a. in the Netherlands/ abroad

The kilometres of international transport have to be divided in a part that is driven within the Netherlands and a part that is driven abroad. This is of course dependent of the place where the trip starts and the place where the border is crossed. If this exact data is not available, a reasonable estimation can be made.

1c. Passengers average per coach/ total passenger kilometres

One or both data can be filled in. Passenger kilometres are calculated as the average number of passengers per coach multiplied with the number of kilometres driven. Some computer programmes supply the number of passenger kilometres directly.

1d Total litres of fuel tanked by the coaches

The total number of litres of fuel with the own fuel station as well as with fuel stations of third parties.

3. Turnover per category of transport (market segment)

The turnover is excluding VAT.

3A. + 3.B Turnover of regulated and unregulated transport

The turnover of coach transport is limited to the revenues of the coach, the driver(s) and tour leader (if any). The turnover is therefore excluding possible revenues of packages, entrance fees, sales on board, etc.

3B.II.4 Rent of coaches for international scheduled line services

Although international scheduled line services can be considered to be regulated transport, they are incorporated in unregulated transport in harmony with the collective labour conditions.

3C.1+2 Coach transport with own/ hired coaches

“Rented coaches” refers to coaches that are hired on an incidental basis from other companies. “Own coaches” refers to coaches that are fully owned but also coaches that are leased from a lease company and coaches that are hired for a certain period (e.g. during a seasonal period).

3C.3 Total coach transport

Total coach transport equals the total of 3A.4+3BI.4+3BII.7 as well as the total of 3C.1+3C.2. This means that the turnovers 3A en 3B don’t have to be divided into own and hired coaches.

Some results of the statistics of KNV Busvervoer

	2004	2003	2002
1a. Number of coaches	5.189	4.745	4.497
1b1. Total number of kilometres driven (x 1 million)	321,9	326,7	331,0
1b2. of which: within the Netherlands (x 1 million)	194,0	198,0	206,5
1b3 .of which: abroad (x 1 million)	127,9	128,7	124,5
1c. Passengers average per coach	37,80	37,38	37,11
1d. Litres of fuel tanked by coaches (x 1 million)	89,7	n.a.	n.a.
2 Share of companies with Quality label	0,81	0,82	0,63
3. Turnover per category of transport	**x € 1 million**	**x € 1 million**	**x € 1 million**
3A. Turnover of regulated transport	**103,8**	**130,3**	**138,1**
3A.1 Transport of pupils and students	19,0	23,1	41,1
3A.2 Transport of workers	48,3	63,9	58,0
3A.3 Domestic scheduled line services	36,5	43,3	39,0
3B. Turnover of unregulated transport	**410,4**	**433,7**	**396,4**
3BI Day trips	***189,9***	***197,9***	***200,8***
3BI.1 Rent to clubs, schools, companies,etc.	159,5	159,3	175,3
3BI.2 Rent for incoming tourism	7,7	10,2	14,4
3BI.3 Self-organised day trips	22,7	28,4	11,1
3BII Serviced trips >1 day, shuttle trips,etc	***220,5***	***235,8***	***195,6***
3BII.1 Rent for serviced trips>1day to clubs, etc.	77,8	63,1	48,9
3BII.2 Rent for serviced trips>1day to tour operators	81,1	93,1	41,0
3BII.3 Rent for shuttle trips to tour operators	23,0	29,6	28,4
3BII.4 Rent for internat. scheduled line services	0,2	0	7,6
3BII.5 Rent for incoming tourism to tour operators	7,9	7,0	10,1
3BII.6 Self-organised serviced trips>1day, etc.	30,5	43,0	59,6
3C.3 Total turnover coach transport	**514,2**	**564,0**	**534,5**
3C.1 Coach transport own coaches	488,0	522,6	519,4
3C.2 Coach transport hired coaches	26,2	41,4	15,1
Indicators:			
1.Turover own coach transport p. coach p. year (x € 1)	94.052	110.117	115.493
2.Total passengers kilometres (pkm) (x 1 billion)	12,16	12,21	12,28
3. Kilometres per coach per year	62.067	68.848	73.601
4.Turnover of own coach transport p. kilometre (x € 1)	1,516	1,599	1,569
5.Turnover of own coach transport per pkm (x € 1)	0,040	0,043	0,042
6. Kilometres per litre of fuel	3,590	n.a.	n.a.

ANNEX 2 DATA SOURCE OF TABLES AND GRAPHS

Figure 2.5.1: *Total costs and cost structures in international bus and coach transport, scheduled and unscheduled, 2004*

	Labour costs	Capital costs	Fuel costs	Other costs	Total
CZ	19.700	28.463	27.846	54.783	130.792
HU	27.362	17.980	41.310	41.691	128.343
BG	10.000	22.557	42.994	28.263	103.814
RO	21.801	52.577	96.726	58.381	229.485
LT	6.660	37.022	48.216	35.101	126.999
MK	8.200	30.492	39.514	43.306	121.512
TR	2.500	43.582	96.154	50.271	192.507
BE	37.600	33.773	20.475	64.757	156.605
DE	32.900	46.297	18.275	62.327	159.798
LU	38.691	28.812	17.280	44.794	129.577
CH	49.500	31.726	16.800	88.568	186.594
AT	52.500	44.238	16.035	48.449	161.222
NL	43.625	26.590	16.817	45.597	132.628
FR	33.000	55.733	63.750	66.433	218.916

Figure 2.8.1*: Excise duty on diesel, Euro/1000 litres, 1998 and 2004.*

Country	Euro		Country	Euro	
	1998	2004		1998	2004
EST	120	245	AT	283	302
LV	160	245	BE	290	315
LT	70	245	DE	317	470
PL	160	222	DK	307	406
HU	270	335	ES	266	294
CZ	220	312	FIN	304	319
SK	210	351	FR	372	417
SLO	340	307	GR	240	245
EU8	194	283	IRL	330	368
BG	80	202	IT	388	403
RO	90	271	LU	253	253
RUS		88	NL	340	360
Non-EU	85	187	PT	282	308
			SE	308	367
			UK	680	688
			EU15	331	368

Figure 2.8.2: *Ownership taxation per year for a 12m coach, 2004*

Country	Euro		Country	Euro
EST			AT	65
LV	224		BE	410
LT	232		DE	665
PL	475		DK	580
HU	752		ES	148
CZ	1.004		FIN	
SK			FR	69
SLO			GR	352
EU8	537		IRL	307
BG	26		IT	
RO	104		LU	273
RUS			NL	652
TR	383		PT	
Non-EU	171		SE	
			UK	488
			EU15	364

ANNEX 3 Questionnaires

IRU QUESTIONNAIRE "UPDATING ROAD TRANSPORT DATA"

PASSENGER TRANSPORT

1 Objective of this IRU/NEA questionnaire is to update information on European road **passenger** transport companies, especially information on costs, cost structures, productivity and the size distribution of these companies.
The questions refer to domestic (interurban) and international scheduled and unscheduled commercial transport. It does not cover own account and urban public transport carried out by private or state/municipality owned companies.

2 All questions refer to the year **2004**. If your information is from earlier years, please fill in the tables and indicate the year the information refers to.

3 IRU and NEA realise that some questions are difficult to answer, especially questions about costs. A practical approach would be to send the tables on average number of kilometres, profitability and costs to a selected sample of your members (a few small o, middle sized and larger companies) in order to receive an appropriate average estimated value.

Respondents are kindly asked to fill in the questionnaire and send it back to NEA BEFORE APRIL 30th 2005, preferably using email. The email address is : kwe@nea.nl. Alternatively, fax or send in by mail to the fax number / post address mentioned below.

For further information please contact:

- NEA Transport research and training, Mr Klaas Westerkamp, P.O.Box 1969, 2280 DZ Rijswijk, the Netherlands, tel +31 70 3988412, fax +31 70 3988426, email kwe@nea.nl
- IRU, Mr Oleg Kamberski (tel +32 2 743 25 80, fax +32 2 743 25 99, email oleg.kamberski@iru.org).

1. Contact details.

Name responding person	
Association name	
Email address	
Country	

2. Size distribution of road passenger transport companies (commercial, domestic)

a Please indicate per size category the number of companies active in domestic transport.

b If you have information according to other size categories, please make an estimate according to the size categories in the table.

Size category(number of coaches)	Number of companies active in domestic scheduled/interurban and unscheduled/tourist passenger transport		
	Scheduled (interurban) transport	Unscheduled (tourist) transport	Both
1			
2 – 10			
11 – 50			
> 50			
Total			

3. Size distribution of road passenger transport companies (commercial, international)

a Please indicate per size category the number of companies active in international transport, or at least the breakdown in % and the total number of companies.

b If you have information according to other size categories, please make an estimate according to the size categories in the table.

Size category(number of coaches)	Number of companies active in international passenger transport		
	International Regular line services (scheduled)	International Tourist Transport (unscheduled)	Both
1			
2 – 10			
11 – 50			
> 50			
Total			

4. Diesel fuel taxation in local currency and EURO

The diesel fuel taxation per litre is	Local currency	
	EURO	
Please indicate the date to which your answer refers	Date (dd/mm/yyyy)	

5. Vehicle taxation per vehicle per year in local currency and EURO (average 12 metre coach)

Annual vehicle tax 12 metre coach	Local currency	
	EURO	
Please indicate the date to which your answer refers	Date (dd/mm/yyyy)	

6. Average number of kilometres per vehicle per year in international transport

	Scheduled (regular lines)	Unscheduled (tourists)
What is the average number of kilometres per year of a 12 metre coach used in international transport?		

7. Average profitability in international road passenger transport

Please indicate an estimate of the profitability (total revenue minus total costs as a percentage of total costs). Example: if total revenue would be 110 and total cost 100, the profitability would be (110-100)/100 = 0.1 = 10%

	Scheduled (regular lines)	Unscheduled (tourists)
We estimate the average profitability in international road passenger transport at (%)		

8. Number of bankruptcies in road passenger transport

Please indicate, and preferably per size category, the number of companies that went bankrupt during the last year, or if you only have information from previous years the number of bankruptcies and the corresponding year. If you don't have these figures per size category, please indicate the total.

Size category (number of coaches)	Number of companies that went bankrupt
1	
2 – 10	
11 – 50	
> 50	
Total	

10. Data cost calculation

Please fill in the next table on the basis of a 12 metre coach, being most used in international passenger transport (scheduled and unscheduled). Try to fill in average values for your country. If need be, please fill in separate tables for scheduled and unscheduled services.

Coach Data	EURO
New value coach	
Residual value	
Nr of years in use	
Price per tyre (average)	
Total km per tyre (average)	
Insurance costs per year	
Repair & Maintenance costs per year	
Costs per year vignette, road user charges, road tolls	
Fuel use per 100 km	
Average fuel price per litre	
Yearly kilometres	
Other costs per year (excluding indirect costs)	
General Data	**EURO**
Interest rate	
Overhead as a % of total costs (or fill in an amount below)	
Overhead, amount per year	
Driver data	
Number of drivers	
Driver cost data	**EURO**
Driver costs per year (wages, taxes, social charges, excl daily subsistence allowance)	
Total daily subsistence allowance per year	
Other driver costs per year	

PLEASE SEND THE QUESTIONNAIRE VIA EMAIL TO kwe@nea.nl
OR
FAX THE QUESTIONNAIRE TO +31 70 3988426

Questionnaire ECMT

QUESTIONNAIRE ON ROAD GOODS AND PASSENGER TRANSPORT STATISTICS

Objective of this IRU questionnaire is to update information on European road **passenger** and **goods** transport companies with data preferably from **2004**.

Regarding passenger transport, the questions refer to domestic (interurban) and international scheduled and unscheduled commercial transport. It does not cover own account and urban public transport carried out by private or state/municipality owned companies.

In goods transport data should cover *both hire & reward and own-account* transport operators.

Respondents are kindly asked to fill in the questionnaire and send it back to NEA BEFORE 10th December 2005, by fax, by mail (to the fax number / post address mentioned below) or using email (kwe@nea.nl).

For further information, please contact:

- **NEA Transport research and training, Mr Klaas Westerkamp, P.O.Box 1969, 2280 DZ Rijswijk, The Netherlands, tel +31 70 3988412, fax +31 70 3988426, email kwe@nea.nl**
- IRU, Mr Oleg Kamberski (tel +32 2 743 25 80, fax +32 2 743 25 99, email oleg.kamberski@iru.org) – passenger transport by road
- IRU, Mr Peter Krausz (tel +41 22 918 27 00, fax +41 22 918 27 41, email peter.krausz@iru.org) – goods transport by road

1. Contact details.

Name of responding person	
Email address	
Country	

2. Size distribution of transport companies (domestic)

Size category (number of vehicles)	Number of companies active in domestic scheduled/interurban and unscheduled/tourist passenger transport	Number of companies active in domestic goods transport		
		Hire& reward	Own-account	Both
1				
2 – 10				
11 – 50				
> 50				
Total				

3. Size distribution of transport companies (international)

Size category (number of vehicles)	Number of companies active in international scheduled/interurban and unscheduled/tourist passenger transport	Number of companies active in international goods[9] transport		
		Hire& reward	Own-account	Both
1				
2 – 10				
11 – 50				
> 50				
Total				

4. Vehicle taxation per vehicle per year in local currency and EURO (average)

Annual vehicle tax 12 metre **coach**	Local currency	
	EURO	
Annual vehicle tax 40-tons road train (**tractor and semi-trailer)**	Local currency	
	EURO	
Please indicate the date to which your answer refers	Date (dd/mm/yyyy)	

[9] In case licences are issued separately for domestic and international transport

5. Modal shares – Passenger Transport (in % of number of passengers carried)

Passenger Transport Mode	Share (in %)	
	Domestic	International
Bus and coach		
Private car		
Railways		
Air transport		

6. Modal shares – Goods Transport (in % of number of tonnes carried)

Goods Transport Mode	Share (in %)	
	Domestic	International
Truck		
Railways		
Inland waterway		
Pipeline		
Air transport		

PLEASE FAX THE QUESTIONNAIRE TO +31 70 3988426 OR SEND THE QUESTIONNAIRE VIA EMAIL TO kwe@nea.nl

Working together for a better future

IRU

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