

# Global Bus and Coach Survey 2022

What are the needs of bus operators?

What are upcoming trends?

How are operators reacting to the current bus ecosystem?

Study based on responses from bus operators in 28 countries from the **Intercity, Airport, and Charter** segments.

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Thanks for helping to share:



# Executive Summary

## The global bus and coach market is changing faster than ever

The bus market is experiencing **titanic changes and opportunity** at a very fast rate, while the vertical had been severely influenced by the COVID-19 pandemic.

A traditional offline business model is still dominant worldwide, while at the same time new digital operators, platforms, and technology providers have entered the market and are beginning to disrupt traditional operations and capture market share.

At the same time, new business models are entering the market, which blur the segments of intercity bus, charter, and on-demand solutions. These new models are creating new offers and flexibility for consumers and are attacking already existing price levels.

Consumer behavior changed immensely in the past two years, shifting a >85% offline market much more quickly to online as would have been expected in a non-COVID 2019. This shift requires comfort and transparency from all parties involved.

Leading cities and governments (partly) are pushing towards more sustainable modes of mobility, forgoing private car and or flight. This helps to grow the bus market even more.

## Key Results

### Distribution

Operators have a clear desire to push their own branded channels. With a 5,6 out of 6, each brand's individual company websites rank number 1 in sales channel importance, while other online channels averaged 3 to 4 out of 6. The top ranked goals in marketing were to strengthen their own brand and make customers loyal. From booking and advertising partners, they expect supporting brand shows a benefit beyond price.

### Pricing Strategy

Dynamic pricing is seen as important now and also a key need in the future (4,4 out of 6 now, rising to 5,4 in 3 years). This is important in this survey as most companies differentiate less on price but more on other benefits such as service, brand, and ease of use. Only about a third use tools for forecasting or market research on routes or competition benchmarking.

### Technology Investment

Only half of companies surveyed plan to invest in their tools, which is on equal footing for the network/inventory management, demand/price planning, and e-commerce/marketing solutions

### Ancillary Revenue

Today ancillary has a medium level of relevance in general and across all areas. Better seats and loyalty schemes have been dominant. While averages are small, selected players see high priority.

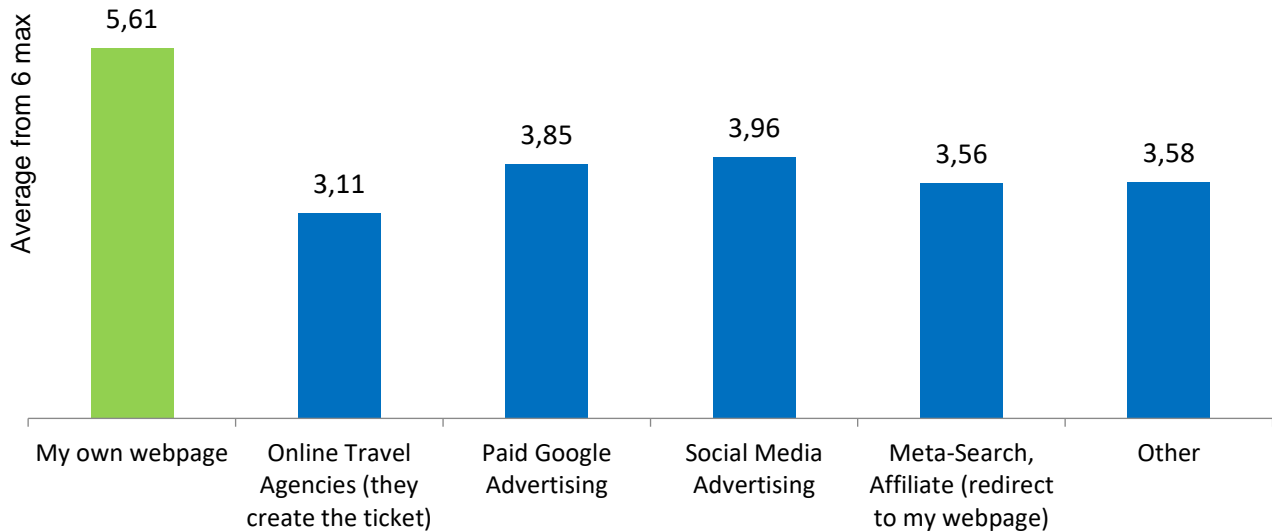
### Future Business Segments

Grouped demand solutions for major events are seen most relevant within three (3) years. Such solutions for final vacation destination, (sub-) urban are seen at medium importance. Same for capillarity of networks or intermodal connections to other modes of travel.



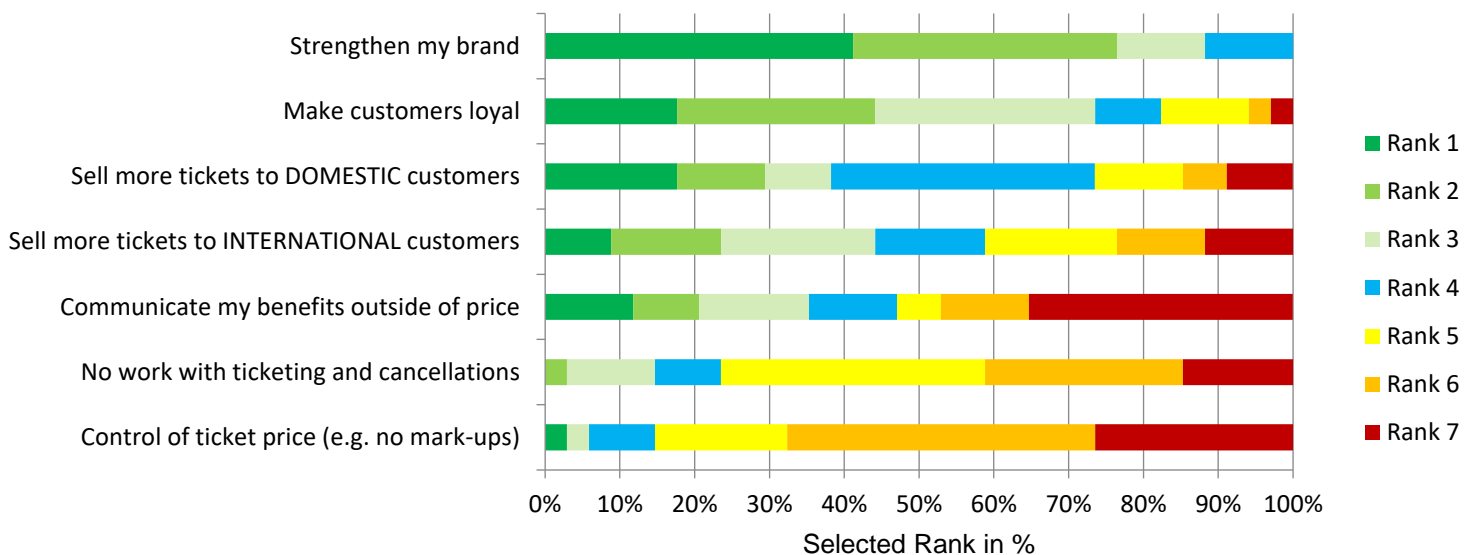
# Distribution – Brand and Customer Loyalty is Key

## How important are the following sales channels to your business?



While all typical online sales channel have a medium relevance. Individual webpages dominate.

## Please rank - Which factors influence your decision most to prioritize an online sales channel?



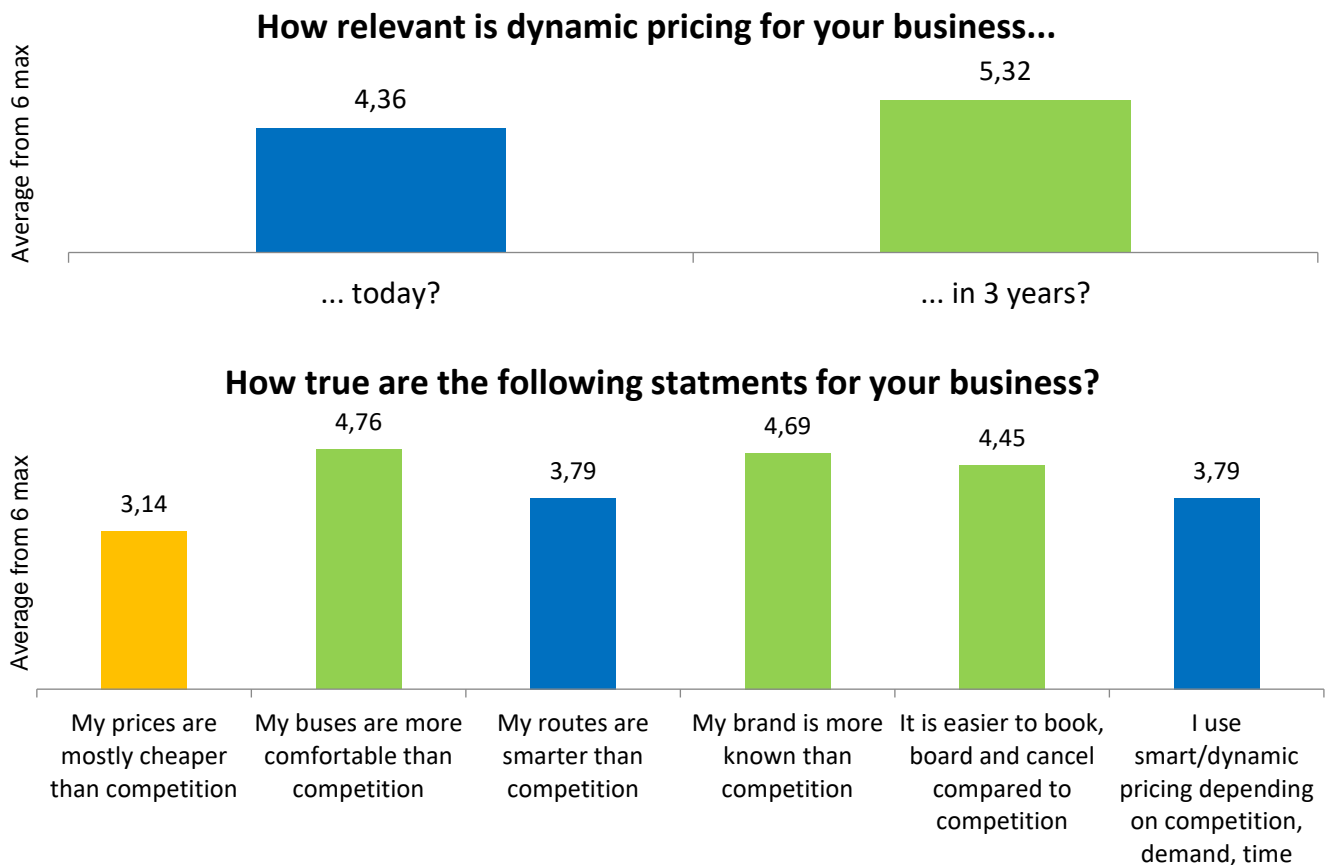
Operators are clearly search to strengthen their brand and make customers loyal. Price control and taking less effort in managing customers have little impact for priorities. The importance of international customers is similar to domestic and depends on the country.

### CheckMyBus Comment:

The preference selected by operators is logical. Our data also shows that operators who successfully create loyalty and brand stickiness in a market grow faster. Looking at shares in third party distribution, however the preferences are not always reflected by operator set-up



# Dynamic Pricing Is the Way to Go



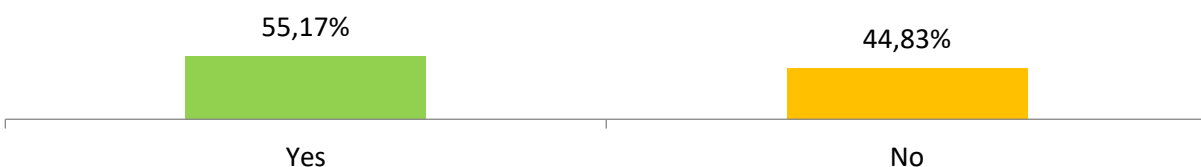
## CheckMyBus Comment:

Based on our data we have seen that for operators who use dynamic pricing, average prices deviate a lot from the cheapest prices. With this strategy, margins remain high, and more tickets are sold.

Our survey shows operators share the importance of dynamic pricing. However, there is little use of tools to support this strategy in the market and limited desire as well to invest.

I currently use tools for ...	
Network Planning tools	46,43%
Demand forecasting on by price and by time	35,71%
No specific tools	35,71%
Price benchmarking vs competition by route	32,14%
Market Research Data to understand demand and price levels on new routes	28,57%
Complex revenue management tools with highly dynamic pricing	10,71%

## Do you plan to invest more in solutions for demand planning / dynamic pricing?

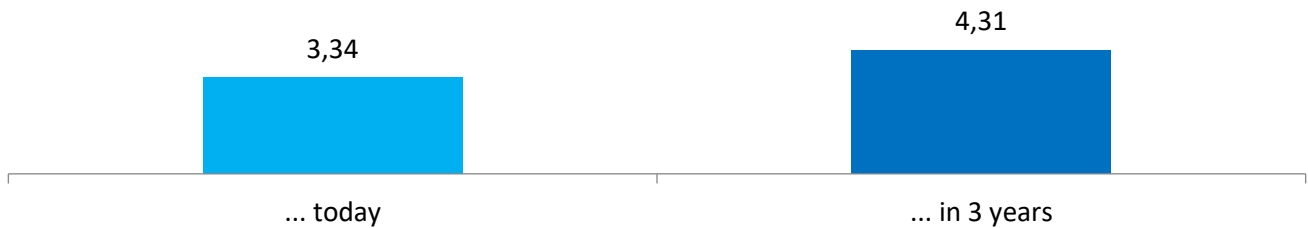


If investment planned preferred more simple solutions for price benchmarking and demand forecasting not the complete Yield Management package

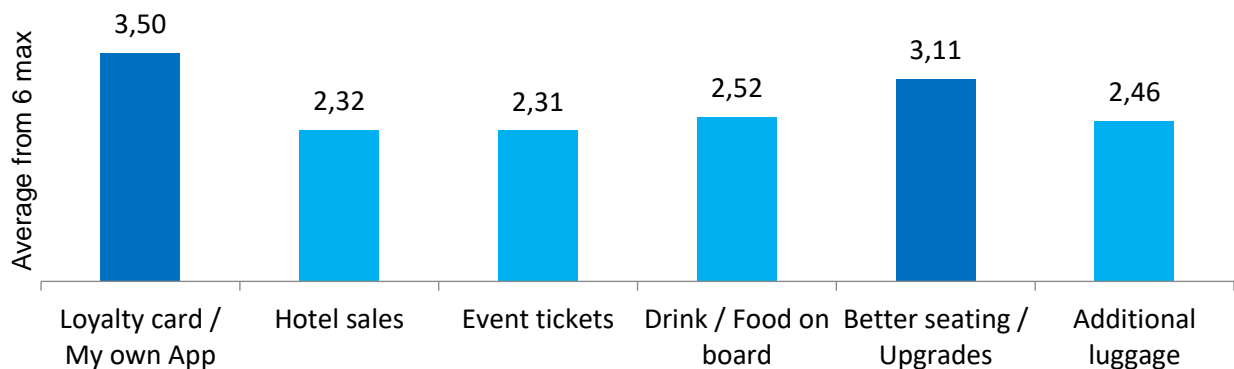


# Ancillary Revenue: A Missed Opportunity?

How relevant is ancillary revenue for your business...

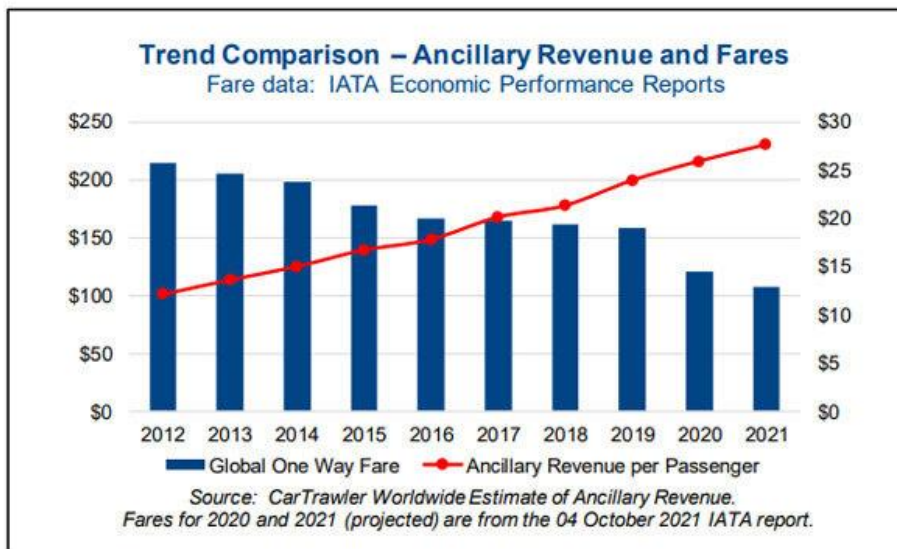


How relevant will the following areas become for you?



## Comparing Ancillary Revenue in Flight

Ancillary revenue has become key in flight. Its share grew by a factor of 5. In US/CA, ancillary revenue already takes 37,5% of revenue in average and beyond 50% for some low-cost carriers in Europe. (Source: Cartrawler / IATA)



## CheckMyBus Comment:

Operators see growing relevance for ancillary revenue in bus in three years but today see only medium priority. With brand in focus the loyalty/App is seen key. The rest fall below average.

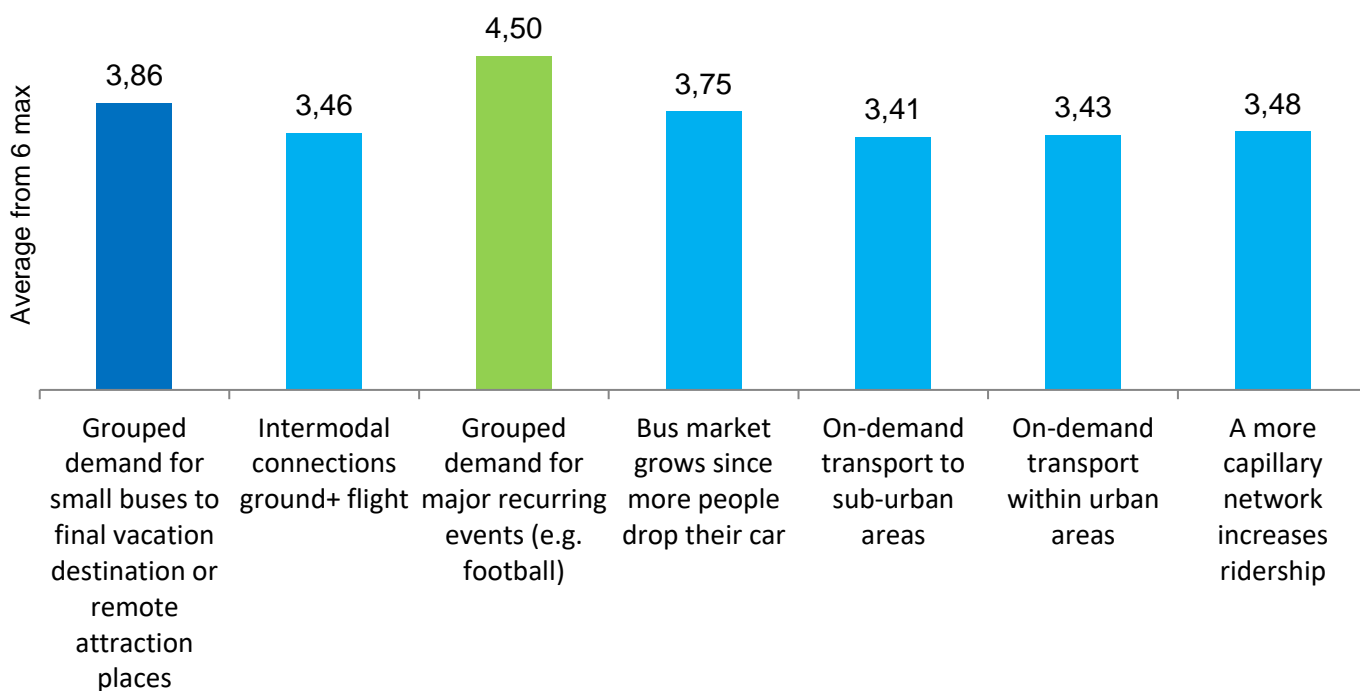
We already see several bus operators smartly embed seating and luggage into their sales process.

Taking (low-cost) airlines as a comparison, it is likely ancillary revenue will become key to retain margin at competitive pricing



# New Business & Technology Invest

**New business - How relevant are the following areas become within the next three years?**

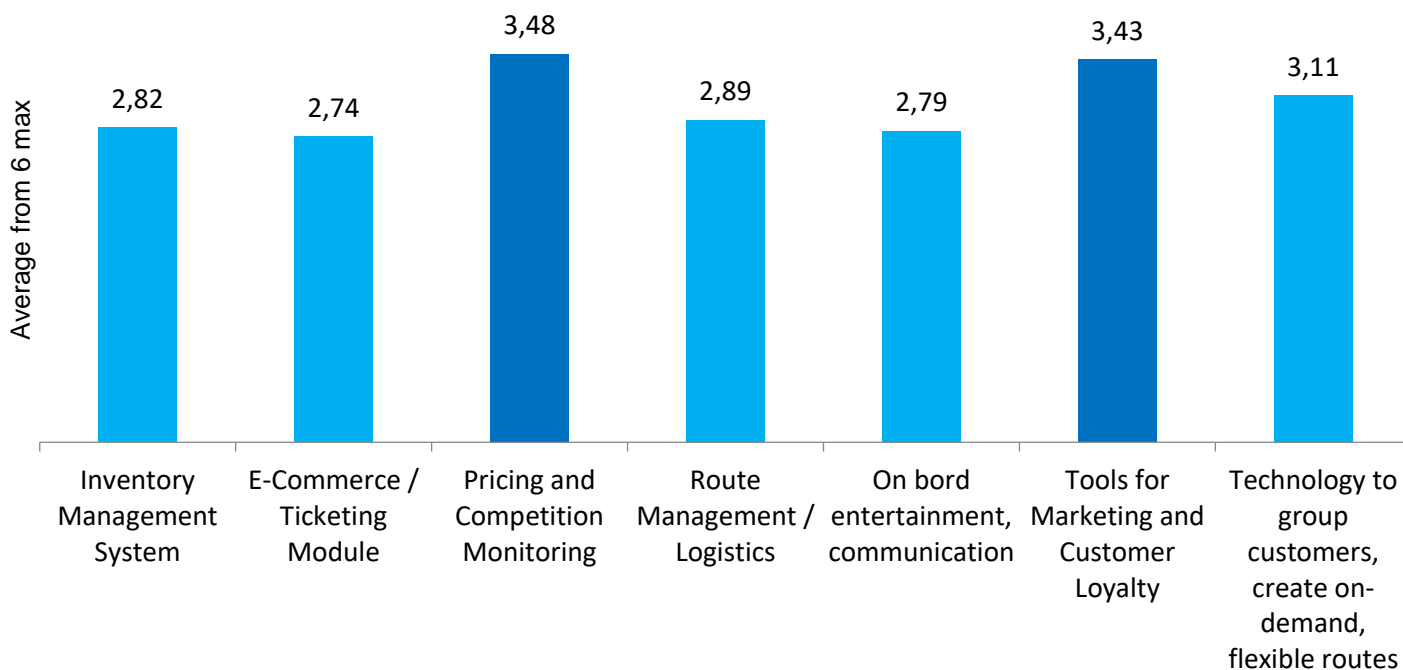


## CheckMyBus Comment:

The flexible grouping of demand is identified as the most important segment of new business, led by transportation to specific events. There have been significant market investments for the urban and sub-urban space which has not been reflected here.

Investments in technology are focusing on price and loyalty. Overall investment in systems has a below average priority. This also accounts for grouping technology, which supports the above trend.

**How urgent do you need to buy, replace or update the following systems?**



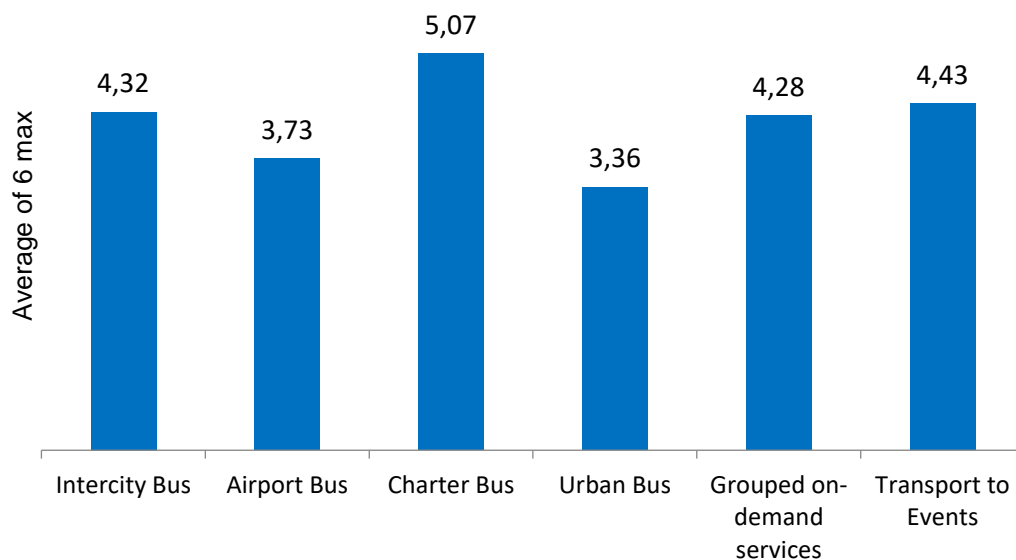
# About the participants

## Countries of Participants

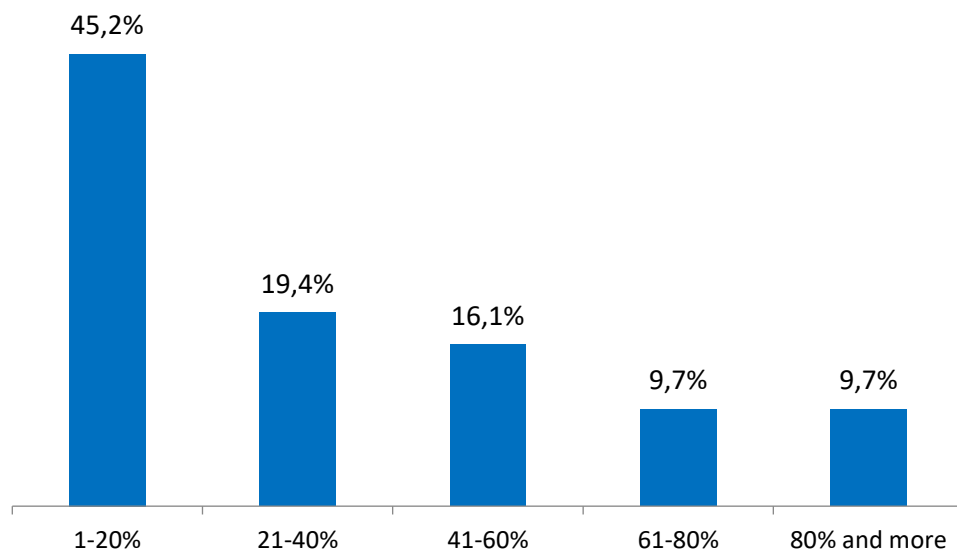
Argentina  
Belgium  
Bolivia  
Botswana  
Brazil  
Canada  
Cyprus  
Finland  
France  
**Germany**  
Greece  
Ireland  
Latvia  
Malta  
Mexico  
Mozambique  
Namibia  
Norway  
Portugal  
Slovakia  
**South Africa**  
**Spain**  
Sweden  
Switzerland  
Turkey  
**United Kingdom**  
**USA**  
Vietnam

„Bold“ countries with sur-proportional amount of returns

## How important are the following segments to your business?



## What is the share of online tickets sold in your company?



Note: The questionnaire was anonymous, so we are unable to look into individual data except where participants provided their email address voluntarily at the conclusion of the survey.

In the cases where participants provided their email address, the vast majority of responses were operators. The two largest groups were intercity bus operators or mixed operators who cover the full portfolio from charter to intercity and tours/events.

Thank you to all participants for sharing your views and knowledge!



# About CheckMyBus

## Leading global search engine for intercity and airport bus

We show stops in **90 countries** and have 21 separate domains to drive local/domestic traffic. Users generate a **9 digit** amount of searches per year

## Data to help

We have hold strong **that bus is a key solution for sustainable mobility**. We are happy to **share market knowledge** to support the growth of the vertical – for good!

## We make bus travel simple

Giving users the possibility to find buses everywhere with a **simple click** helps to grow the market.

We make it **simple for bus operators** and OTAs to get on board and support global distribution.

## Supporting your brand

We are a **pure search engine**. We do not take bookings. Instead, we redirect users to our partners branded page. Everyone who works with us gets the opportunity **make customers loyal**

## Need more information? Please contact us!

We can help with individual market studies, share our thoughts and beliefs on the latest trends, and help create contact with solutions partners.

For Partnership Inquiries: [partner@checkmybus.com](mailto:partner@checkmybus.com)

For Media Inquiries: [press@checkmybus.com](mailto:press@checkmybus.com)

