



Commercial Bus Services in the Greater Dublin Area



Bulletin Topics:

- Number of operators
- Passenger journeys
- Scheduled vehicle kilometres
- Numbers of buses
- Fleet with Automatic Vehicle Location (AVL)
- Fleet with smartcard reading equipment
- Fleet that is low-floor and wheelchair accessible
- Passenger revenue
- Free Travel Scheme revenue
- Total public transport passenger journeys



Introduction

This statistical bulletin is a publication of the National Transport Authority of Ireland (“the Authority”).

It focuses on bus statistics for licensed bus passenger services in the Greater Dublin Area for the year 2012. The Greater Dublin Area comprises the city of Dublin and the county councils of South Dublin, Fingal, Dún Laoghaire-Rathdown, Kildare, Wicklow and Meath.

These licensed services are often called “commercial” bus services because they are operated without any public subsidy from the Authority. Many of the services, however, receive Free Travel payments from the Department of Social Protection in compensation for the revenue foregone from carrying those entitled to Free Travel.

These bus services are individually licensed by the Authority. Under section 73 (Information, data and statistics) of the Dublin Transport Authority Act 2008, the Authority is required to “*collect, compile, analyse and prepare information, data or statistics*” regarding public transport in the Greater Dublin Area.

The bus services covered by this bulletin include any licensed service with an origin, intermediate point, or a destination point within the Greater Dublin Area (i.e. essentially any service travelling through any part of the Area). The Authority wrote out to all licensed operators in 2013 seeking data in respect of 2012 and so, unless otherwise stated, all of the statistical information below relates to 2012 services.

Readers should be aware that the two principal contracted State funded bus operators, Bus Éireann and Dublin Bus, also provide licensed commercial bus services and so when relevant, their licensed figures are included in the licensed commercial bus services data.

The Authority has produced separate bulletins on State funded services provided by Dublin Bus, Bus Éireann and the Rural Transport Programme, as well as bulletins on State funded rail services provided by Iarnród Éireann and Luas. These can be found on the Authority’s website www.nationaltransport.ie under the heading Publications & Statistics.

Section 73 of the Dublin Transport Authority Act 2008 was amended by section 75 of the Taxi Regulation Act 2013. This amendment resulted in the extension of the requirement on the Authority to “*collect, compile, analyse and prepare information, data or statistics*” regarding public transport to the entire State. This legislative change officially came into operation on the 1st of January 2014 through Order S.I. No. 524 of 2013.

As a result the Authority will be requiring all current public bus passenger licence holders in the State to submit their 2013 returns and this information will then be published in a similar format to this bulletin in the future.

The Greater Dublin Area statistics are very relevant due to (a) the amount of bus commuting in the eastern region of the country and (b) the fact that the statistics capture all services passing through the Area e.g. inter-city coach services to and from Dublin.

Statistical Qualification - it is important to note that the figures used in this bulletin are intended to illustrate general public transport features for licensed commercial public bus passenger services including patronage, passenger revenues and the characteristics of the fleet, and they are not meant to be read as precise calculations. Rounding has been used and this could affect overall percentages.

These statistics have not been collected before and it has involved some of the operators compiling this type of information for the first time. As this information will be collected on an annual basis, operators will be able to repeat the process and refine their reporting methods and, if required, this should strengthen the validation and quality of the data.

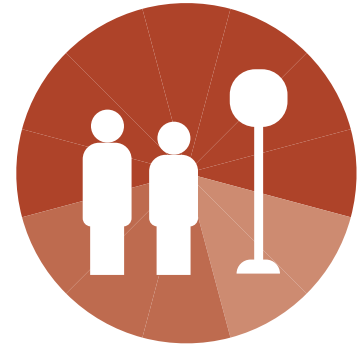
In publishing data the Authority has been fully aware of its obligations regarding commercially sensitive information and has therefore ensured, for all licensed operators, that patronage and revenues have been presented in a consolidated and anonymised fashion, thus protecting operator confidentiality.

Acknowledgement

The Authority would like to extend its appreciation to the licensed commercial bus operators for their co-operation and assistance in contributing to this bulletin. A 100% return was achieved.

1

Number of Operators



There were 44 operators with licences to provide bus services within and through the Greater Dublin Area (GDA) in 2012. Seven of these operators had no data returns for a mixture of reasons, including that their returns were included in another operator's returns (one operator), that they were no longer operating any services in the GDA or that they were no longer operating any services at all. It should be noted that where specific returns were not provided for a licence then this licence was revoked.

It is important to highlight that there is a large variability in the scale and type of services provided by operators. The 38 active operators include large scale inter-city and interurban services that provide connections to Dublin city and airport, as well as urban and suburban services predominately operating in Dublin city and county.

2

Total Number of Passenger Journeys



Tables 1A and 1B along with Figure 1 illustrate licensed commercial public bus passenger journeys in comparison to Public Service Obligations (PSO) services across the State. PSO services are those public transport services that are subsidised by the Government via the Authority.

The national statistics for PSO bus services are made up of PSO figures from Dublin Bus, Bus Éireann and services provided under the Rural Transport Programme (RTP) and relate to contracted services that are subsidised by the State. Further information on these services is available in the *Bus Statistics for Ireland – State Funded Services 2013* bulletin no. 01.

Although licensed commercial bus passenger journeys only relate to GDA services in this bulletin, a substantial amount of national licensed commercial services operate into and out of Dublin and they are therefore captured in the GDA licensed bus service statistics.

As can be seen in Table 1B, **licensed commercial bus passenger journeys represent about 8% of the total figure.** However, it must also be borne in mind that journey lengths can vary in size depending on the type of service. For instance a three kilometre urban journey in Dublin city is not the same as a 200km interurban journey between Dublin and Galway, although they are both counted as one passenger journey.

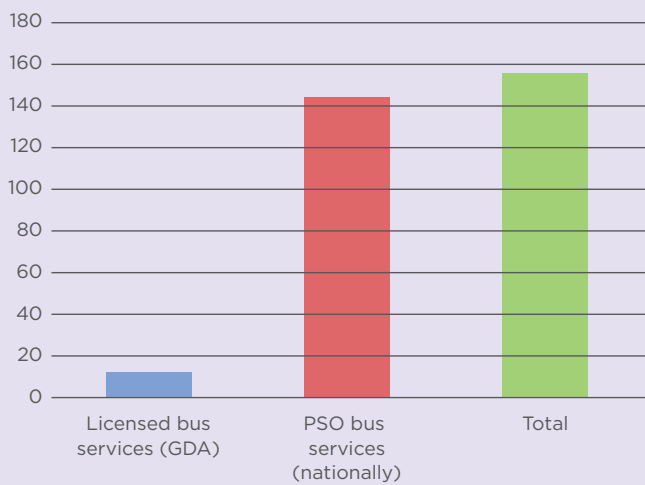
Table 1A
Annual passenger journeys (millions)

Licensed bus services (GDA)	12.91m
PSO bus services (nationally)	143.64m
Total	156.55m

Table 1B
Percentage of annual passenger journeys

Licensed bus services (GDA)	8.25%
PSO bus services (nationally)	91.75%
Total	100.00%

Figure 1
Licensed and PSO annual bus passenger journeys (millions) 2012



The percentage of licensed commercial bus passenger journeys is greatly diluted by the large number of Dublin Bus passenger journeys (113.28 in 2012). A comparison excluding Dublin Bus PSO journeys is shown in Table 1C.

Table 1C
Comparison of annual passenger journeys excluding Dublin Bus PSO services

Licensed bus services (GDA)	29.84%
PSO bus services (nationally excl. Dublin Bus)*	70.16%
Total	100.00%

*Note: PSO services refer to Bus Éireann and Rural Transport Programme (RTP) services.

3

Scheduled Vehicle Kilometres



‘Scheduled vehicle kilometres’ indicate the number of vehicle kilometres that a bus company planned to operate in a given period, e.g. a year, as per their cumulative timetables.

Tables 2A and 2B along with Figure 2 illustrate licensed commercial scheduled vehicle kilometres in comparison to Public Service Obligations (PSO) bus services across the State excluding Rural Transport, for which many services are demand responsive and vary from day to day.

As can be seen **licensed bus scheduled vehicle kilometres represent nearly 40% of the total figure**, which reflects the fact that a significant proportion of these licensed bus services are operating reasonably long interurban services.

In contrast to the section on passenger journeys in Section 2, these figures show a much higher percentage for licensed services when comparing licensed and PSO scheduled vehicle kilometres.

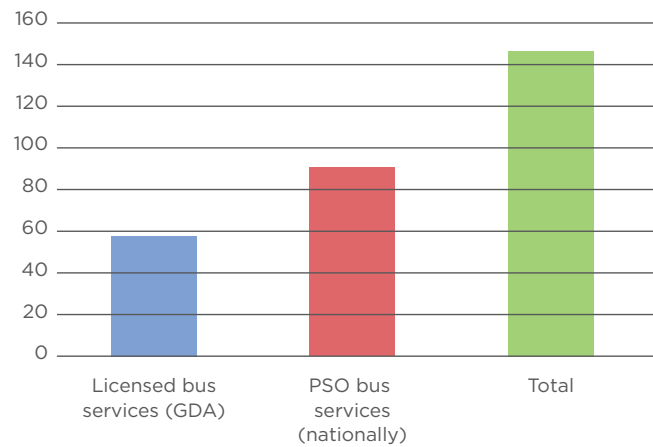
Table 2A
Annual scheduled vehicle kilometres (millions)

Licensed bus services (GDA)	57.19m
PSO bus services (nationally)	89.44m
Total	146.63m

Table 2B
Percentage of total vehicle kilometres

Licensed bus services (GDA)	39%
PSO bus services (nationally)	61%
Total	100%

Figure 2
Licensed and PSO annual scheduled vehicle kilometres (millions) 2012



4

Numbers of Buses used to Provide Licensed Services



The numbers of buses that are used to provide licensed bus services in the GDA are outlined below.

The buses referred to in the tables would include a broad variety of vehicles, such as inter-city coaches and low-floor urban double decker buses. These buses would have a range of different vehicle designs and numbers of seats.

The PSO bus figures relate to Dublin Bus and Bus Éireann only and show their bus numbers that applied at the end of 2012. Rural transport services are excluded because, in general, the buses used are mini buses which also perform other types of services such as school transport, community group journeys, and sports journeys.

Table 3A
Numbers of buses used to provide services

Licensed bus services (GDA)	550
PSO bus services* (nationally)	1,357
Total	1,907

*Excluding rural mini-buses

Table 3B
Percentage of total number of buses used to provide services

Licensed bus services (GDA)	29%
PSO bus services* (nationally)	71%
Total	100%

*Excluding rural mini-buses

Figure 3
Numbers of licensed and PSO buses providing services 2012

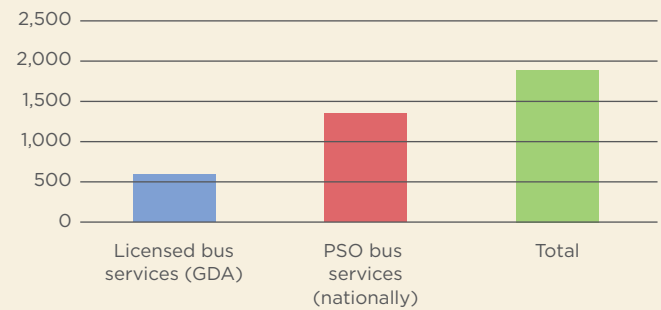


Table 3C
Number of buses used to provide services by largest operators

Largest* 5 operators number of buses	318
Largest* 10 operators number of buses	421
All licensed operators number of buses	550

*Note: Largest here is measured by operator's fleet size.

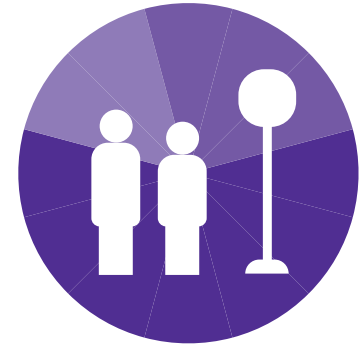
Table 3D
Number of buses used to provide services by operator's fleet size

Number of operators with one bus only	5
Number of operators with two buses only	7
Total number of active operators	38

*Note: Largest here is measured by operator's fleet size.

5

Operating Fleet with Automatic Vehicle Location (AVL) Systems on Board



Automatic Vehicle Location (AVL) is the term used for automatically determining the geographic location of a vehicle or number of vehicles.

Vehicles are generally tracked by placing a Global Positioning System (GPS) electronic device in or on a vehicle. There are a number of benefits to AVL, especially in a public transport context, including that it allows an operator to manage fleet better, know where the vehicle(s) are at any given point and it facilitates the provision of real time bus or rail passenger information.

As mentioned in Section 4, there are 550 buses used to provide licensed bus services in the GDA. Of these 550 buses, 406 have AVL systems on board, which means that **74% of the total licensed GDA bus fleet has AVL systems on board.**

Table 4A below shows that the five largest licensed operators (out of the total of 38 active operators) have 299 buses or 74% of all buses with AVL systems on board. This percentage then increases to 91% for the largest 10 operators. These figures indicate that there is a concentration of buses with AVL systems on board among a small group of operators.

Table 4A
Number of buses with AVL systems on board

Largest* 5 operators with AVL on buses	299
Largest* 10 operators with AVL on buses	369
All licensed operators with AVL on buses	406

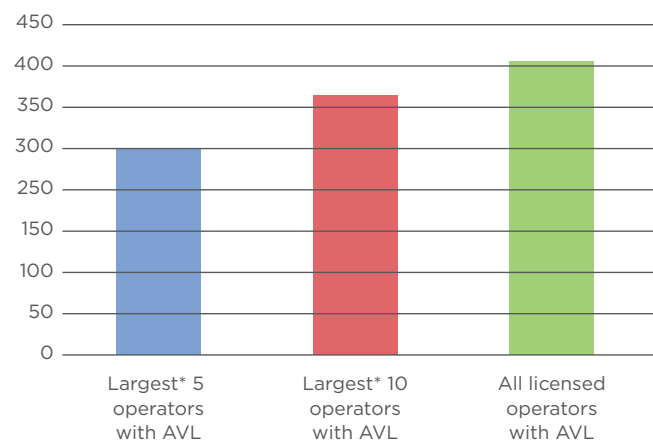
**Note: Largest here is measured by those operators with the biggest AVL fleet size.*

Table 4B
Percentage of all AVL buses controlled by larger operators

Largest* 5 operators with AVL on buses	74%
Largest* 10 operators with AVL on buses	91%
All licensed operators with AVL on buses	100%

**Note: Largest here is measured by those operators with the biggest AVL fleet size.*

Figure 4
Number of licensed operating fleet buses with AVL systems on board 2012



**Note: Largest here is measured by those operators with the biggest AVL fleet size.*

6

Operating Fleet with Smartcard Reading Equipment



Public transport smartcards are the technological successor to the older magnetic tickets.

Smartcards are generally the size of a credit card and contain a microchip that stores and transmits data. This enables them to communicate with a smartcard reading device without actually touching it, once the card is held close to the device.

The Leap card is the major public transport smartcard in the GDA, available for publicly subsidised and licensed services. However some licensed operators operate their own smartcard.

As mentioned in Section 4, there are 550 buses used to provide licensed bus services in the GDA. Of these 550 buses, 106 have smartcard reading equipment on board, which means that **19% of the total licensed GDA bus fleet has smartcard reading equipment on board.**

In respect of licensed services, there are currently 59 buses operating in the GDA with Leap card readers on-board. As the Leap card programme continues to be rolled out across the GDA and beyond, this number will naturally increase.

Table 5A shows that the five largest licensed operators have 93 buses or 88% of all buses with smartcard reading equipment on board. This percentage then increases to 100% for the largest 10 operators. These figures indicate that there is a high concentration of buses with smartcard reading equipment among a small group of operators. This is to such an extent that the largest 10 operators have all the buses with smartcard reading equipment on board.

Table 5A
Number of buses with smartcard reading equipment (SRE) on board

Largest* 5 operators with SRE on buses	93
Largest* 10 operators with SRE on buses	106
All licensed operators with SRE on buses	106

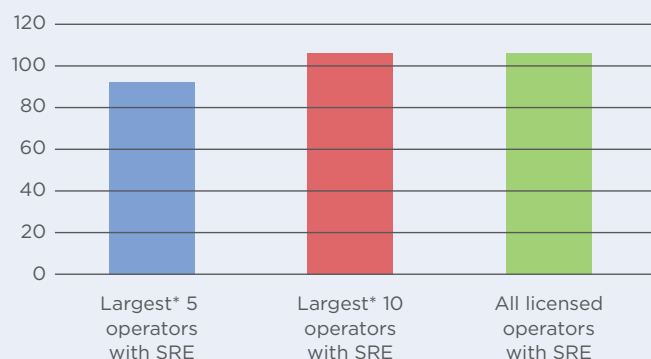
*Note: Largest here is measured by those operators with the biggest SRE fleet size.

Table 5B
Percentage of all SRE buses controlled by larger operators

Largest* 5 operators with SRE on buses	88%
Largest* 10 operators with SRE on buses	100%
All licensed operators with SRE on buses	100%

*Note: Largest here is measured by those operators with the biggest SRE fleet size.

Figure 5
Number of buses with smartcard reading equipment (SRE) on board



*Note: Largest here is measured by those operators with the biggest SRE fleet size.

7

Operating Fleet that is Low-floor and Suitable for Wheelchair Access



With low-floor wheelchair accessible buses, access to part or all of the passenger area is direct from the bus stop apron. This enables easier access for wheelchair users and those with limited mobility.

Accessing low floor buses can also require that appropriate bus stop infrastructure, for instance kerbs of a specific height, are in place.

It is important to highlight that the figures below will only indicate whether a vehicle is both low-floor and wheelchair accessible. There are vehicles within the licensed commercial bus services fleet that are wheelchair accessible (by way of lifts which raise the individual above the steps and into the coach corridor area) but not low-floor. Although these vehicles are not included in the figures below, this data will be available when the 2013 licensed bus statistics are published.

As mentioned in Section 4, there are 550 buses used to provide licensed bus services in the GDA. Of these 550 buses, 65 are low-floor, wheelchair accessible buses, which means that 12% of the total licensed GDA bus fleet are low-floor and wheelchair accessible.

Table 6A shows that the five largest licensed operators have 51 buses or 78% of all buses with low-floor wheelchair accessible buses. This percentage then increases to 94% for the largest 10 operators. These figures indicate that there is a concentration of buses that are low-floor and wheelchair accessible among a small group of operators.

Table 6A
Number of buses that are low-floor and wheelchair accessible (LFWA)

Largest* 5 operators with such buses	51
Largest* 10 operators with such buses	61
All licensed operators with such buses	65

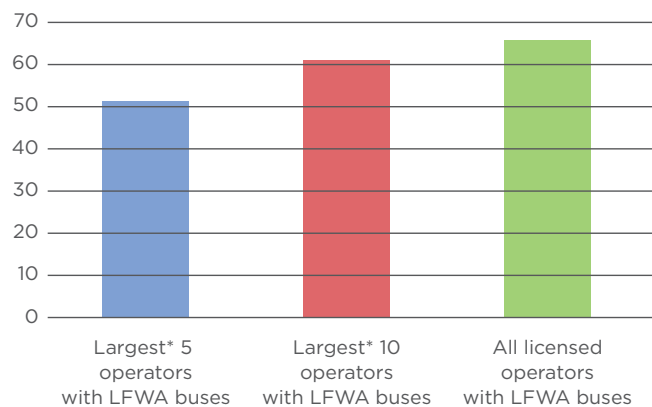
** Note: Largest here is measured by those operators with the biggest LFWA fleet size.*

Table 6B
Percentage of all LFWA buses controlled by larger operators

Largest* 5 operators with such buses	78%
Largest* 10 operators with such buses	94%
All licensed operators with such buses	100%

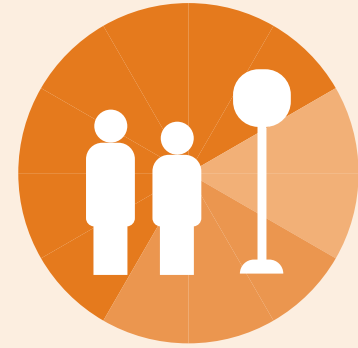
**Note: Largest here is measured by those operators with the biggest LFWA fleet size.*

Figure 6
Number of buses that are LFWA 2012



8

Passenger Revenue



Licensed commercial passenger revenue consists of all revenue from ticket sales (including online & prepaid tickets), Department of Social Protection Free Travel payments, and commercial sector payments.

The vast majority of the licensed commercial passenger revenue is estimated to be from ticket sales alone. It is also important to note that revenue from private hire services is not included in the revenue figures.

A commercial sector payment in respect of licensed commercial passenger services refers to when, for example, a business park pays a bus operator to run a particular scheduled route that serves a business park area.

As can be seen from the tables, **licensed bus passenger revenue represents about 27% of the total passenger revenue figure in the State.** The PSO bus services national passenger revenue is made up of revenue figures from Dublin Bus, Bus Éireann and the Rural Transport Programme (RTP). It does not include PSO subsidy payments in respect of these services but does include the Free Travel grant.

Table 7B Percentage of annual passenger revenue

Licensed bus services (GDA)	27%
PSO bus services (nationally)	73%
Total	100%

Figure 7 Annual passenger revenue 2012

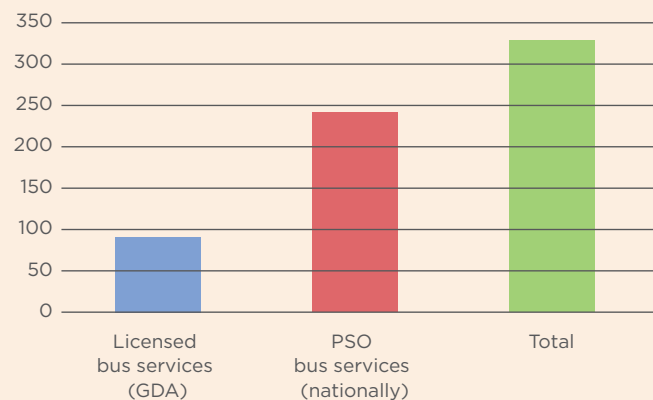


Table 7A Annual passenger revenue (€ millions)

Licensed bus services (GDA)	€87.77m
PSO bus services (nationally)	€242.27m
Total	€330.04m

9

Free Travel Scheme Revenue



The Department of Social Protection's Free Travel Scheme is available to all persons aged 66 and over living permanently in the State.

Some people under 66 may also qualify such as carers in receipt of a Carer's Allowance and certain other persons in receipt of a Disability Allowance and Invalidity Pension.

Free travel is available on all State funded bus and rail transport including Dublin Bus, Bus Éireann, Iarnród Éireann and Luas services. Free travel is also available on a number of licensed commercial services operated by private bus companies and Bus Éireann.

Table 8A shows annual Department of Social Protection (DSP) payments for the Free Travel Scheme for licensed services and PSO bus services. **Unlike in other sections in this bulletin, the licensed bus revenue is national data.**

As Bus Éireann receives a payment in respect of its licensed and PSO services, their payment is split between the licensed bus services and the Bus Éireann PSO services amounts.

Table 8A
Annual DSP Free Travel Scheme bus payments

Licensed bus services (nationally)*	€18.778m
Dublin Bus PSO services	€20.596m
Bus Éireann PSO services (nationally)	€12.114m
Rural Transport Programme (RTP)	€1.500m

Note: This includes the Free Travel Scheme revenue for Bus Éireann licensed services nationally*

10

Total Public Transport Passenger Journeys in Ireland - ESTIMATION



One of the benefits of conducting this research into licensed commercial public bus services is that it assists in compiling total public transport passenger journeys for Ireland.

We currently have actual passenger data for all bus, rail and light rail services except '*Licensed bus services not operating within or through GDA*'. However, given that we have (i) information on licensed services within and through the GDA, (ii) information on Bus Éireann and Dublin Bus licensed services from their annual reports and (iii) that the size of the GDA licensed bus market greatly outweighs the licensed bus market in the rest of the country, we can make a very good estimation of overall public transport journeys.

Please be aware that these figures do not include information on Event or Venue specific licences, Temporary services, Demand Responsive services or Specific Targeted services, such as tours, social club events, et cetera. The Authority did not request this data as part of the research because of the ad hoc and irregular nature of these mainly ancillary services.

The figures also do not include any passenger journeys from privately-provided school transport services as this information is not available. Passenger journeys from the Department of Education & Skills (DES) school transport schemes are included, as well as schoolchildren using all other scheduled public transport services.

The figures in Table 9A show that approximately **270 million public transport passenger journeys were made in Ireland in 2012**. It is also of interest to note that roughly 75% of all public transport trips in Ireland were made using the bus services provided by PSO operators, rural transport operators, licensed commercial bus operators and the Department of Education & Skills school transport provider.

Table 9A
Public transport passenger journeys in Ireland by operator 2012

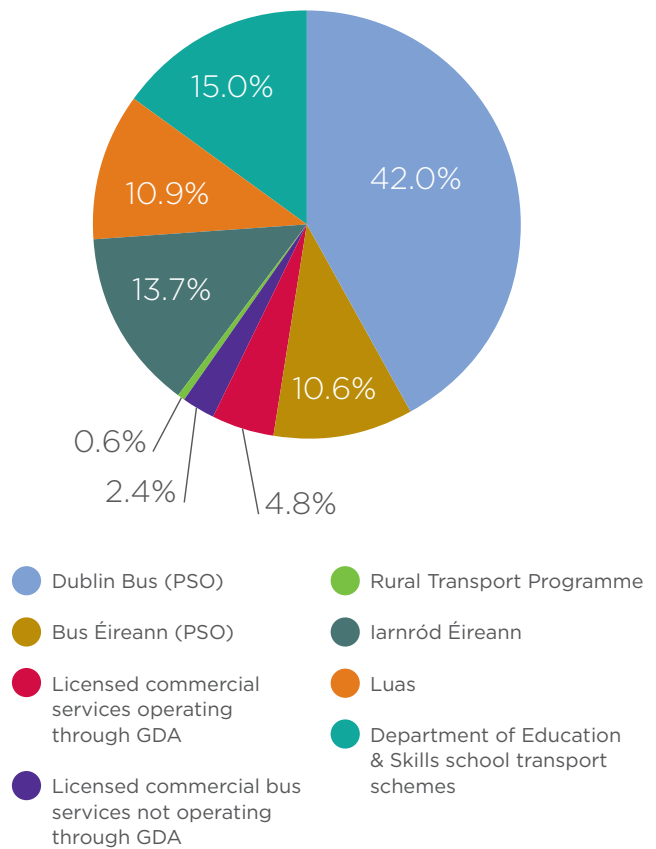
Operator	Passenger numbers (millions)	% split of passenger total
Dublin Bus (PSO) ref i	113.28	42.0%
Bus Éireann (PSO) ref ii	28.63	10.6%
Licensed commercial bus services operating through GDA	12.91	4.8%
Licensed commercial bus services not operating through GDA ref iii	6.46 ESTIMATION	2.4% ESTIMATION
Rural Transport Programme ref iv	1.73	0.6%
Iarnród Éireann ref v	36.92	13.7%
Luas ref vi	29.32	10.9%
Department of Education & Skills school transport schemes ref vii	40.40	15.0%
Total	269.65 ESTIMATION	100.0%

Note: see references overleaf for respective data sources.

Notes to Table 9A:

- i. NTA (2013), "Bus Statistics for Ireland - State Funded Services, Statistical Bulletin Number 01, September 2013"; National Transport Authority, Dublin; available at: <http://www.nationaltransport.ie/wp-content/uploads/2013/10/Bus-Statistics-for-Ireland.pdf>
- ii. NTA 2013 (as number i)
- iii. Estimation is that all licensed commercial bus passenger journeys not operating through the GDA are 50% of all licensed commercial bus passenger journeys operating through the GDA.
- iv. NTA 2013 (as number i)
- v. NTA (2013), "Rail Statistics for Ireland, Statistical Bulletin Number 02, September 2013"; National Transport Authority, Dublin; available at: <http://www.nationaltransport.ie/wp-content/uploads/2013/10/Rail-Statistical-Bulletin.pdf>
- vi. NTA 2013 (as number v)
- vii. Bus Éireann (2013), "Annual Report & Financial Statements 2012", Bus Éireann, Dublin, p.7; available at: <http://www.buseireann.ie/pdf/1369234343-Annual-Report-2012.pdf>

Public transport passenger journeys in Ireland, 2012



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