Údarás Náisiúnta Iompair
National Transport Authority

Commercial Bus Services

in Ireland

Bulletin Topics:

- Overview of Commercial Bus Services
- Number of Operators and Licences
- Passenger Journeys
- Scheduled Vehicle Kilometres
- Revenue and Ticketing
- Fleet Size
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- Automated Vehicle Location (AVL)
- Fleet Age

Introduction

Introduction to the Statistical Bulletin on Commercial Bus Services in Ireland in 2019

This statistical bulletin is a publication of the National Transport Authority of Ireland (the "Authority"). It focuses on bus statistics for licensed public bus passenger services operating to a regular schedule in Ireland. The Authority was established under the Dublin Transport Authority Act, 2008 (as amended) and the Public Transport Regulation Act, 2009 (as amended) and is required[1] to *"collect, compile, analyse and prepare information, data or statistics"* regarding public transport services in Ireland.

The data in this bulletin covers statistical information for all regular public bus passenger services across the entire State for the years 2013 to 2019 and for the Greater Dublin Area (the "GDA") for the years 2012 to 2019.

High level information on State funded services which are provided under contract to the Authority referred to as Public Service Obligation ("PSO") services, has also been included for comparative purposes. The Authority publishes a separate bulletin on State funded services "Bus and Rail Statistics for Ireland – State Funded Services" which can be found on the Authority's website at: https://www.nationaltransport.ie/publications/statistics/bulletins/

Definition of the Licensed Regular Public Bus Passenger Services covered in this Statistical Bulletin

Licensed public bus passenger services are often called "commercial" bus services because they are operated without any public subsidy from the Authority. These commercial bus services are individually licensed by the Authority. Some commercial bus services, however, receive payments from the Department of Employment Affairs and Social Protection's Free Travel Scheme in compensation for the revenue foregone from carrying those passengers entitled to free travel.

The commercial bus services covered by this bulletin include any licensed regular bus service with an origin, intermediate point or a destination within the Republic of Ireland. Bus services which were subject to an international authorisation under EU law and were travelling to, from or through Northern Ireland and then into this State are also included in the bulletin.

References to commercial bus services therefore include services operating wholly within the State and bus services which cross the border into Northern Ireland.

The two principal contracted State funded bus operators, Bus Éireann and Dublin Bus, also provide commercial bus services. These include the Bus Éireann Expressway services and the Dublin Bus Airlink services. The figures for these services are included in this bulletin.

Licence Categories not included in the Bulletin

Certain commercial public bus passenger service licence categories are not included in this bulletin. These are Event and Venue licences, which cover public bus passenger services for concerts and other events; Specific Targeted licences, which cover public bus passenger services such as tours; as well as Demand Responsive licences. Complete details of each of category of public bus passenger service licence can be found in the 'Guidelines for the Licensing of Public Bus Passenger Services' available to download from www.nationaltransport.ie/bus-licensing/

References to GDA and Non-GDA services and Operators

'GDA services' refers to any commercial bus service travelling to, from or through any of the GDA counties of Dublin, Meath, Wicklow or Kildare. This includes commercial bus services that travel wholly within the GDA and services which include stops both inside and outside of the GDA. GDA services for the purposes of this bulletin include both licensed and authorised services.

The bus services travelling wholly outside of the GDA counties are referred to as 'Non-GDA services' and 'Nationally' refers to the combined figures for all the bus services running to, from or through the State. These are the meanings assigned throughout the document, unless otherwise stated. Again, these services include licensed and authorised services.

Some operators have a mix of GDA and Non-GDA services. References to GDA and Non-GDA operators do not include operators with a mix of services, and are simply operators that have either solely GDA or Non-GDA services.

[1] Section 73 (Information, data and statistics) of the Dublin Transport Authority Act 2008, as amended

Inclusion and Exclusion of certain types of Public Transport in the Comparisons

Information on the State Funded Bus and Rail services has been included for comparative purposes only. These services consist of the PSO services provided by Iarnród Éireann (Irish Rail); LUAS; Dublin Bus; Bus Éireann; Go Ahead Ireland; Local Link and private operators under contract to the Authority. Full details can be found in the Authority's Statistical Bulletin No. 2 of 2020. Comparisons do not include information on Taxi or School Bus Services. Information on Taxi services can be found in the Authority's Statistical NTA-Taxi-Statistics-2019 bulletin. All of the Authority's Bulletins can be viewed and downloaded here: https://www.nationaltransport.ie/publications/

Seventeen operators did not supply returns for commercial bus services provided in 2019. The combined figures for these licences accounted for less than 0.5% of previous years' overall totals for passenger journeys or scheduled kilometres. Due to the rounding used in this bulletin the figures have no statistical impact on percentages however, the actual figures would be higher than recorded.

Authority Obligations in Relation to Commercially Sensitive Information

In publishing this data the Authority has been fully aware of its obligations regarding commercially sensitive information and has therefore ensured that patronage and revenue data have been presented in a consolidated and anonymised fashion.

Statistical Qualification

It is important to know that the figures used in this bulletin are provided by the operators and are not independently verified by the Authority.

Some figures have been estimated by operators. The figures are intended to illustrate general features and broad trends for commercial bus services in Ireland. They are not meant to be read as precise calculations. Rounding has been used which could affect overall percentages. Please also be aware that some figures from previous years' may have been subsequently revised by the operators. The data expressed in this bulletin utilises the most up to date information provided by the operators and updates all previous bulletins.

Overview of Figures for Commercial Bus Services in 2019

Total Passenger Journeys (Nationally)

2018 27.5 Million Journeys → **2019** 30.5 Million Journeys → Up 11% from 2018 and Up 52% since 2013

Total Scheduled Vehicle Kilometres (Nationally)

2018 93.1 Million KM → **2019** 101.2 Million KM → Up 9% from 2018 and Up 26% since 2013

Total Revenue (Nationally)

2018 €203.7 Million → **2019** €219.4 Million → Up 8% from 2018

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Acknowledgement
The National Transport Authority would like to extend its appreciation to the licensed and authorised commercial bus operators for their co-operation and assistance in contributing to this bulletin.

Overview of Commercial Bus Services

The year 2019 saw the largest annual year on year increase in passenger journeys and scheduled kilometres on commercial bus services since 2013, when national data was first collected. There has been a 52% increase in passenger journeys on commercial public bus services between 2013 and 2019. In context, total passenger journeys on all of the contracted PSO services grew by 40%[2] over the same period. Contracted PSO services include Dublin Bus services (excluding Airlink); Bus Éireann services (excluding Expressway); Go Ahead Ireland; Iarnród Éireann (Irish Rail); LUAS Light Rail; Local Link and services provided by private operators under contract to the Authority.

Commercial bus passenger journeys were the fastest growing bus services in the public transport sector from 2013 to 2019. The highest growth in passenger journeys between 2013 and 2019 was on light rail services in Dublin and rail services in Cork.

In 2019 passenger journeys on commercial bus services represented 9.4% of all public transport journeys, up slightly from 9.3% in 2018.

Scheduled vehicle kilometres, vehicle age, and accessibility information are indicators for trends in the availability of and investment in public transport provided by commercial bus services. Since 2013, the total number of buses and coaches used on commercial services has increased by 19%, the average age of vehicles has dropped from 6.8 years to 5.4 years, and the percentage of vehicles used which are accessible has increased from 42% to 52% of the total vehicles.

The scheduled vehicle kilometres provided by commercial bus services were up 9% on 2018 and up 26% since 2013. Commercial bus vehicle kilometres represented 46% of all[3] public transport vehicle kilometres in the State including light and heavy rail services, as well as contracted bus services. This is an increase of 2% from 44% in 2018.

The high ratio of scheduled vehicle kilometres for commercial bus service when compared with all other public transport vehicle kilometres is due to the large variation in the nature of the bus service types provided. These include high frequency urban services and long distance intercity services, as well as college, commuter, and rural services.

For the second year operators were asked to report on a per licence basis the number of vehicles and accessible vehicles used. This provides for more accuracy in calculating not just the number of accessible vehicles, but also the volume of the overall scheduled kilometres provided by such vehicles. For 2019 operators reported that 59% of the scheduled vehicle kilometres were provided by accessible vehicles. This was slightly lower than the 60% reported in 2018 however there was an increase of over eight million scheduled vehicle kilometres provided between these years. The average age of the vehicles was six years, down from seven years the previous year.

In 2019 53% of the operators held only one licence while 21% of operators held four or more licences. In terms of fleet size, 39% of operators used one to two vehicles, down from 47% in 2013. Operators using more than 25 vehicles represented 13% of all operators, up from 3% in 2013. This indicates that, on average, operator fleet sizes providing commercial bus services have grown.

[2] Bus & Rail Statistics for Ireland – State Funded Services page 4
[3] Excluding Taxi and school bus services

Table A: Overview of the Commercial Bus Passenger Sector (in millions)

Year	Total Passenger Journeys	Free Travel Journeys (Estimated)	Scheduled Vehicle KM
2013	20.1	4.8	80.1
2019	30.5	6.0	101.2
Change 2013-2019	52%	24%	26%

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Number of Operators and Licences

It is important to highlight that there is a large variability and diversity in the scale, frequency, and type of commercial bus services provided by operators.

Commercial bus services cover large scale inter-city and interurban bus services which provide connections to and from the country's main towns, cities and airports; commuter services that bring passengers to employment and education; urban and suburban services; and rural services that generally link small towns and villages in rural areas.

A single licence may provide numerous services per hour or per day, using several vehicles with large passenger capacities. An operator can also hold several licences, each of which may have a small number of services per week or per month, and provide all of these services using one vehicle with a lower passenger capacity.

Tables 1A and 1B show the number of active operators and the number of active licences/ authorisations per year. Where a licence and an authorisation are operated in conjunction with each other, this has been counted as one service. Table 1C shows the number of new licences granted for commercial bus services. Regular licences are valid for three years and expire if not renewed. Licences may also be revoked, either by the Authority or at the request of the operator.

While the overall number of operators has remained relatively static, individual operators have entered and left the market. In 2019 there was a total of 128 operators providing 324 active licenses and authorisations. Five were new entrants[4] to the regular commercial bus services market. In 2018 there were six new entrants, five in 2017, four in 2016, and seven in 2015.

2019 was the first year since 2015 where there was an increase on the previous year of active and granted licences. Between 2015 and 2018 there had been a decrease in the number of active licences each year. There were 15[5] new licences granted in 2019. Of these, 14 commenced in 2019. These are accounted for within this bulletin. Eight of these new licences were for GDA services. This is a change as since 2014 Non-GDA services were the majority of new licences granted each year. These figures are set out in Table 1C. New licences granted and commenced represent approximately 4% of all licences in 2019.

As with previous years, operators with a higher number of licences carried the greater number of passengers but represented a small proportion of all operators.

[4] New entrants can include instances where licences were transferred, including where the transfer was between limited companies, from sole traders to limited companies, and from existing operators to sub-contractors, as well as operators entering the regular service market who were not in the market in the previous year or were previously active in the non-regular bus passenger services market, such as the tourist market or the private hire market.

[5] New licences do not include where an existing licence lapsed and the services were re-applied for and a new licence issued.

Table 1A: Number of Operators with Active Regular Licences

Year	Number of Operators with Active Regular Licences
2013	124
2014	127
2015	126
2016	122
2017	124
2018	126
2019	128

Table 1B: Number of Active Regular Licences/ Authorisations

Licences/ Year	2015	2016	2017	2018	2019
Non-GDA services	214	217	217	206	212
GDA services	131	127	118	111	112
Total Non-GDA and GDA	345	344	335	317	324

Table 1C: Number of New Licences (Excludes Licences granted where a previous Licence expired)

Year	Non-GDA services	GDA services	Total New Regular Licenses Granted	New licenses which Commenced in year granted
2014	25	7	32	--
2015	20	15	35	33
2016	12	11	23	17
2017	12	6	18	13
2018	6	4	10	6
2019	7	8	15	14

Figure 1.1 and Tables 1D to 1F set out the percentages of operators by the number of licences held and compare

national totals against the GDA and Non-GDA only operators. Figure 1.2 compares the number of licences held by operators and the percentage of the passenger journeys taken on those services.

In 2019, just over half of operators (51%) held only one licence and accounted for 6% of all passenger journeys. This is down slightly on 53% of operators in 2018 accounting for 7% of passenger journeys, but consistent with figures since 2015. For operators providing only Non-GDA services, the proportion of single licence holders was higher, with approximately three out of every five operators (58%) holding one licence.

Figure 1.1: Percentage of Operators by Number of Licences Held

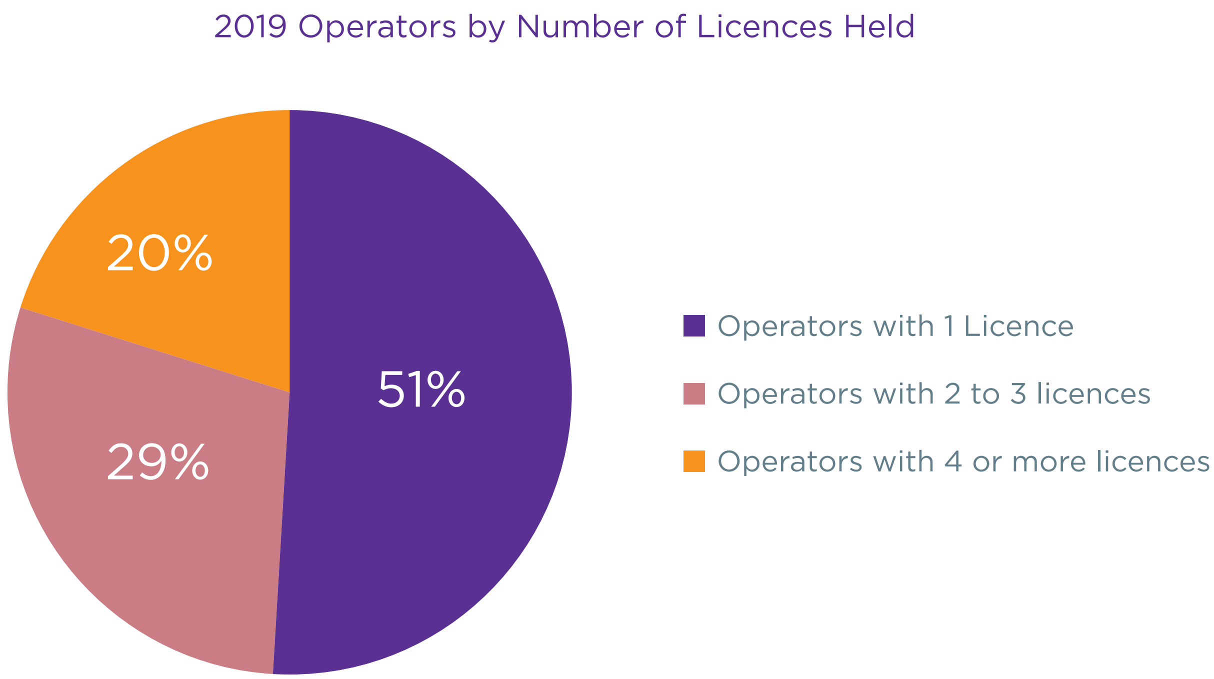


Table 1D: Percentage of All Operators by Number of Licences Held (Nationally)

Percentage of Bus Service Operators/ Number of Licences:	2015	2016	2017	2018	2019
Operators with 1 Licence	50%	51%	50%	53%	51%
Operators with up to 2 Licences	70%	70%	70%	70%	71%
Operators with up to 3 Licences	79%	79%	77%	79%	80%
Operators with up to 4 Licences	86%	83%	84%	85%	85%
All Operators & Licences	100%	100%	100%	100%	100%

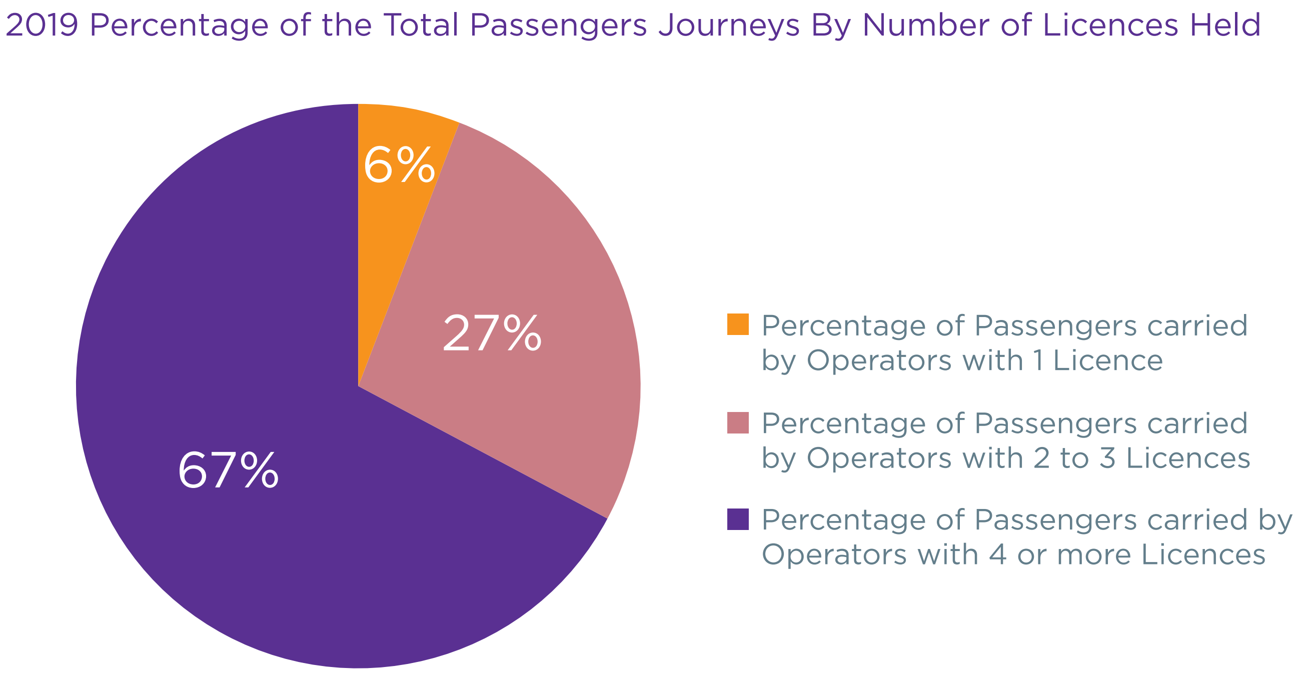
Table 1E: Percentage of All Non-GDA Operators by Number of Licences Held (Operators providing Non-GDA services only)

Percentage of Bus Service Operators/ Number of Licences:	2015	2016	2017	2018	2019
Operators with 1 Licence	55%	59%	58%	60%	58%
Operators with up to 2 Licences	73%	75%	77%	78%	78%
Operators with up to 3 Licences	85%	84%	84%	86%	85%
Operators with up to 4 Licences	91%	88%	90%	90%	90%
All Operators & Licences	100%	100%	100%	100%	100%

Table 1F: Percentage of All GDA Operators by Number of Licences Held (Operators providing GDA services only)

Percentage of Bus Service Operators/ Number of Licences:	2015	2016	2017	2018	2019
Operators with 1 Licence	42%	38%	50%	56%	56%
Operators with up to 2 Licences	65%	62%	78%	75%	81%
Operators with up to 3 Licences	71%	71%	84%	81%	84%
Operators with up to 4 Licences	77%	76%	91%	91%	91%
All Operators & Licences	100%	100%	100%	100%	100%

Figure 1.2: Percentage of Passenger Journeys based on Number of Licences Held (Nationally)



2

Total Number of Passenger Journeys

Demand for public transport services is strongly related to economic activity. Economic growth increases employment, disposable income, and consumer spend, all of which lead to greater demand for travel. Economic decline produces the opposite effect.

Strong growth in passenger journeys continued on commercial bus services overall between 2018 and 2019, with an increase of 11% in passenger journeys. There was a 7% increase between 2017 and 2018.

The growth in passenger journeys was slightly higher on Non-GDA services, at 11.7%, than on GDA services at 10.5%.

Passenger journeys on GDA services have seen year on year increases since 2012 and were 73% higher in 2019 than in 2012. GDA service passenger journeys in 2019 were over 67% higher than in 2013. Non-GDA service passenger journeys, which were not recorded in 2012, were just under 25% higher in 2019 than in 2013.

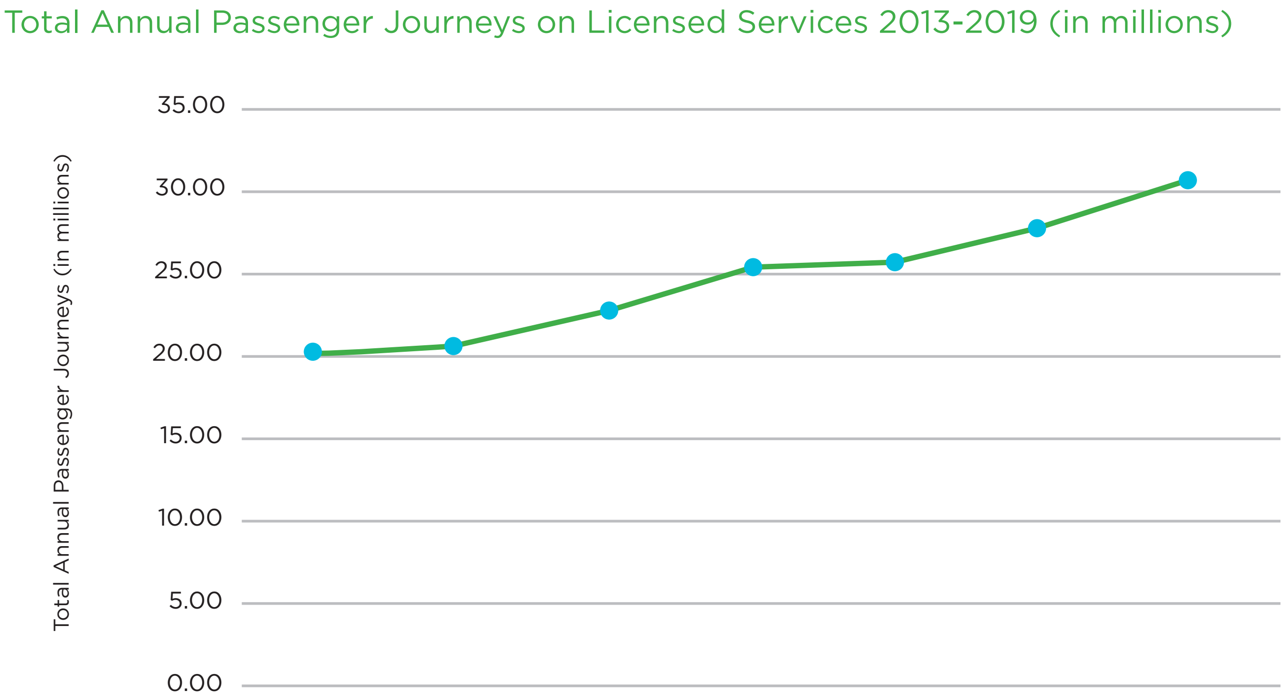
Figures 2.1 and 2.2, and Table 2A highlight the growth in respect to passenger journeys between 2013 and 2019. Table 2A also shows how passenger journeys grew by area based on 2013 journey figures. Table 2B gives a breakdown of the market share of passenger journeys between Non-GDA services and GDA services.

For a broader view, passenger journeys on commercial bus services and PSO bus and rail services are compared in Figures 2.3 and 2.4, as well as in Table 2E. Combined total passenger journeys on both the commercial and PSO public transport services have been growing at an increasing rate since 2013, from a combined total increase of 4% between 2013 and 2014 to a 10% increase between 2018 and 2019. The combined figures show passenger journeys were 41% higher in 2019 than in 2013, as shown in Table 2E.

Commercial bus services have seen a faster increase in passenger journeys than the increase in PSO passenger journeys from 2013 to 2019. Commercial bus passenger journeys grew by 52%, with PSO passenger journey[6] growth at 40% over the same period. See Figure 2.3 for percentage change per year. Commercial bus services increased market share of all public transport passenger journeys from 8.7% in 2013 to 9.4% in 2019.

[6] See NTA-Bus-and-Rail-Statistics 2020 page 4

Figure 2.1: Commercial Bus Services Total Passenger Journeys by Year 2013-2019 (in millions)



	2013	2014	2015	2016	2017	2018	2019
Total Annual Passenger Journeys	20.10	20.75	22.73	25.25	25.78	27.51	30.52

Table 2A: Percentage Change from 2013 Annual Commercial Passenger Journeys

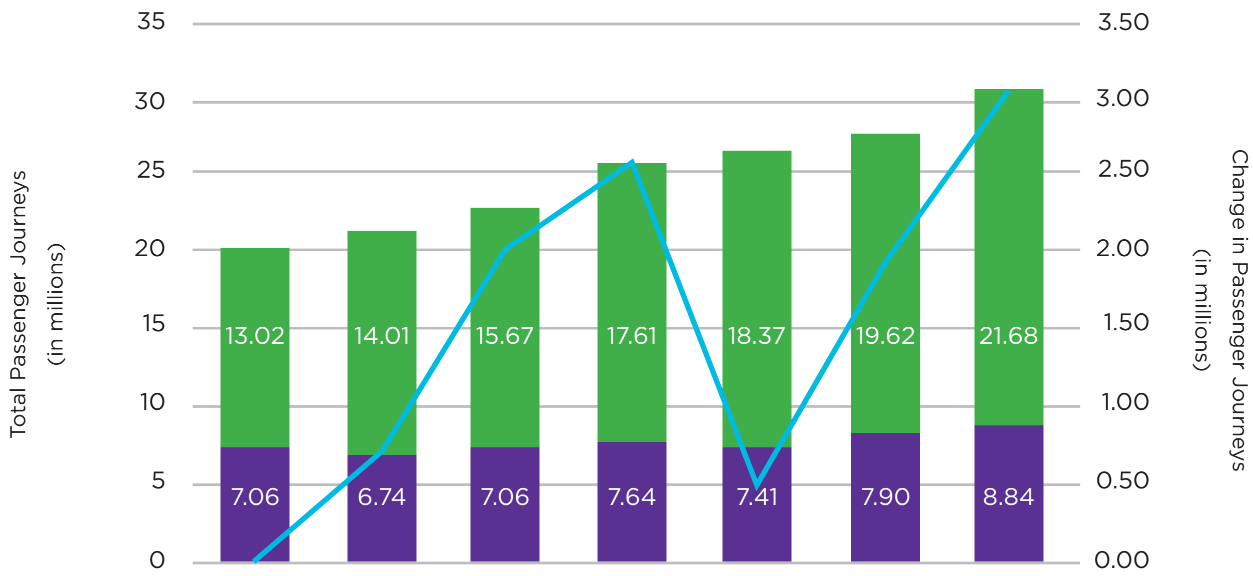
Year/ Licensed & Authorised Services	Total Annual Passenger Journeys	Total Change	% Change From Previous Year	% Change with 2013 as 100%
2013	20.10	-	-	100%
2014	20.75	0.65	3%	103%
2015	22.73	1.98	10%	113%
2016	25.25	2.52	11%	126%
2017	25.78	0.52	2%	128%
2018	27.51	1.74	7%	137%
2019	30.52	3.01	11%	152%

Table 2B: Percentage of Total Annual Commercial Passenger Journeys by Service Type

Year/ Licensed & Authorised Services	Non-GDA Services	GDA Services
2013	35%	65%
2014	32%	68%
2015	31%	69%
2016	30%	70%
2017	29%	71%
2018	29%	71%
2019	29%	71%

Figure 2.2: Comparison of Commercial Bus Services Total Passenger Journeys by Year 2013-2019 (in millions)

Total Annual Passenger Journeys on Commercial Bus Services (in millions)



	2013	2014	2015	2016	2017	2018	2019
GDA Services	13.02	14.01	15.67	17.61	18.37	19.62	21.68
Non-GDA Services	7.06	6.74	7.06	7.64	7.41	7.90	8.84
Total Change	0.00	0.65	1.98	2.52	0.52	1.74	3.01

Table 2C: Annual Passenger Journeys and Percentage Change by Area by Year

Change from previous Year	Non-GDA Services	Non-GDA Services	GDA Services	GDA Services
2013	7.06	-	13.02	4.2%
2014	6.74	-4.6%	14.01	7.6%
2015	7.06	4.8%	15.67	11.9%
2016	7.64	8.2%	17.61	12.2%
2017	7.41	-3.0%	18.37	4.3%
2018	7.90	6.6%	19.62	6.8%
2019	8.84	11.9%	21.68	10.5%

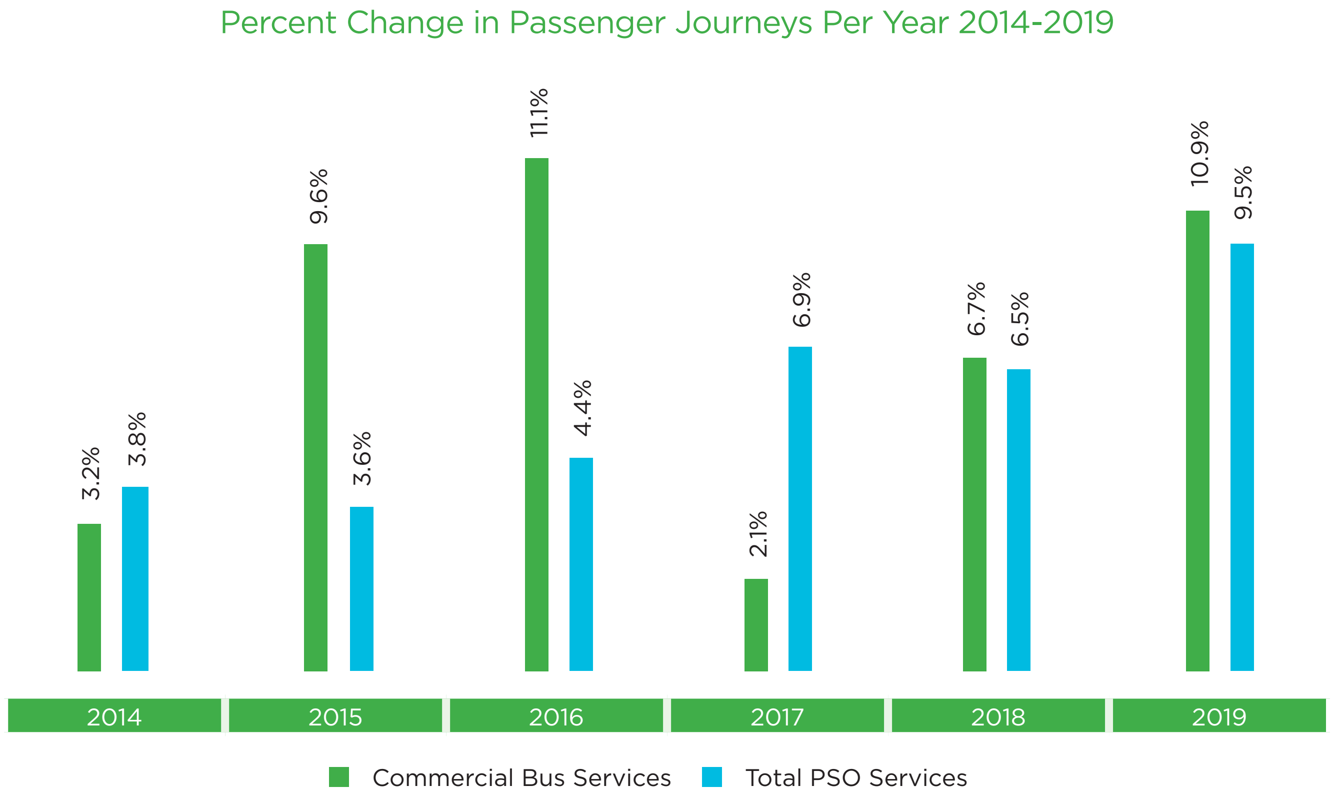
Table 2D: Change in Total Annual Commercial Passenger Journeys as a Percent of 2013 figures

Change from 2013 with 2013 as 100%	Non-GDA Services	GDA Services	All Commercial Bus Services
2014	95%	108%	103%
2015	100%	120%	113%
2016	108%	135%	126%
2017	105%	141%	128%
2018	112%	151%	137%
2019	125%	167%	152%

Table 2E: Comparison of PSO[7] and Commercial Service Total Annual Passenger Journeys by Year 2013-2019 (in millions)

Year	Total PSO[8]	Total Commercial	Total PSO and Commercial	% PSO Change	% Commercial Change	% Total Change
2013	210.1	20.1	230.2	-	-	-
2014	218.1	20.8	238.9	3.80%	3.20%	3.81%
2015	226.1	22.7	248.8	3.60%	9.60%	3.67%
2016	236.1	25.3	261.4	4.40%	11.10%	4.42%
2017	252.2	25.8	278	6.90%	2.10%	6.82%
2018	269	27.5	296.5	6.50%	6.70%	6.66%
2019	294.6	30.5	325.1	9.50%	10.90%	9.52%
Change 2013-2019	84.5	10.4	94.9	40%	52%	41%

Figure 2.3: Comparison of Change in Passenger Journeys by Transport Sector 2014-2019



[7] NTA-Bus-and-Rail-Statistics 2020 page 4
[8] Includes PSO Bus, Rail and Light Rail Services

Figure 2.4: Comparison of the Percentage Increase in Total Passenger Journeys by Transport Sector 2013 – 2019

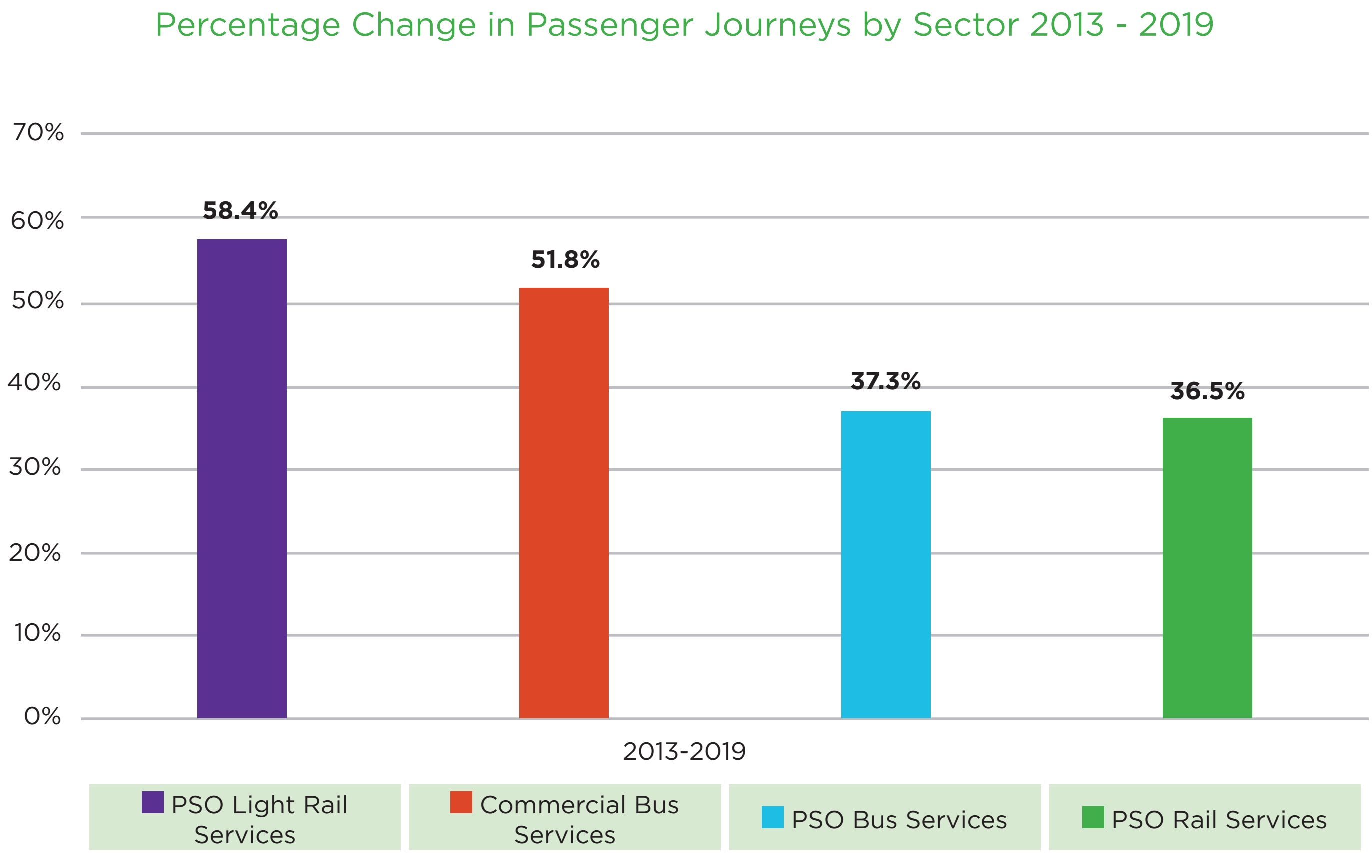
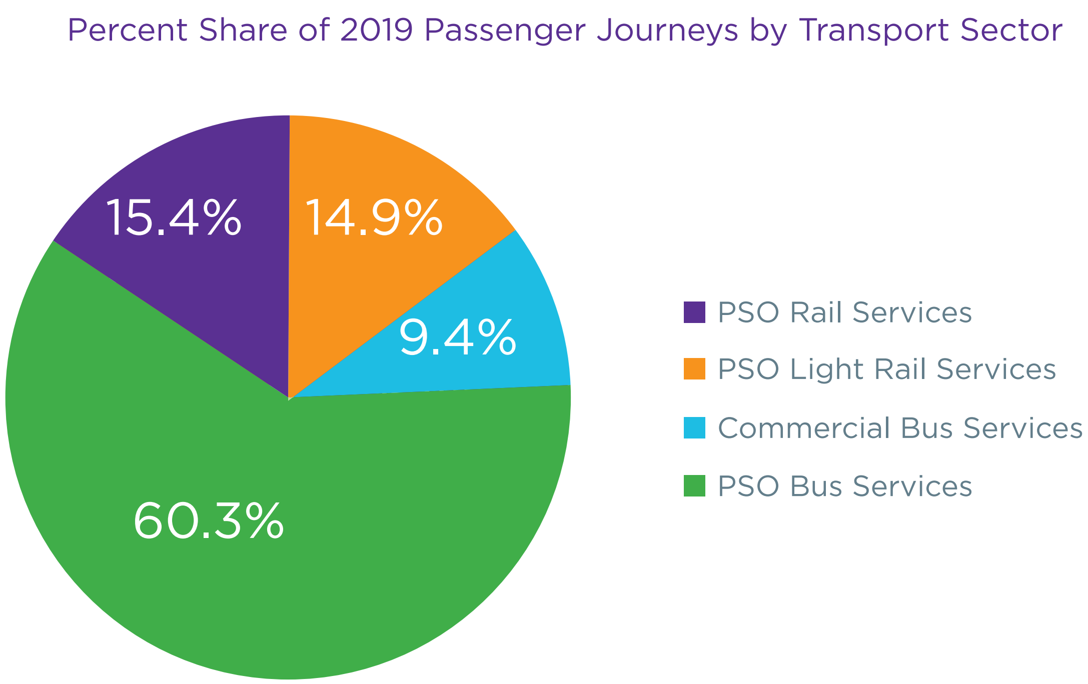


Figure 2.5: Comparison of the Percentage Share of Total Passenger Journeys by Transport Sector 2019



Free Travel Passenger Journeys

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 or an Invalidity Pension.

Since 1995, Northern Ireland Senior Citizens aged 65+ have been eligible for restricted cross border free travel from any point in Northern Ireland to any destination within the Republic of Ireland. This provision was further expanded in 2007, to allow eligible Northern Ireland 65+ Senior Smart Pass holders to travel for free, not only to a destination across the border but also on internal public transport services within the Republic of Ireland.

Free travel is available on State funded bus and rail transport including Dublin Bus; Bus Éireann; Go Ahead Ireland; Iarnród Éireann (Irish Rail); LUAS Light Rail; Local Link and services provided by private operators under contract to the Authority.

Free travel is also available on a number of commercial bus services. Operators that are part of the scheme receive payments for the fare forgone for carrying passengers entitled to free travel.

As part of the Annual Bus Operator Returns, operators estimate the number of free travel passenger journeys as a percentage of all journeys for each licence and authorisation. The estimated total of free travel passenger journeys has risen between 2013 and 2019 by 25%. While there had been a decreasing trend from 2013 to 2018, in 2019 the estimated number of free travel journeys increased from 18% to 20%, as shown in Table 2G. Due to the overall growth level of 52% in commercial passenger journeys in the same period, the percentage free travel passenger journeys of all passenger journeys has decreased from 24% in 2013 to 20% in 2019.

A significant divide between free travel passenger journeys on Non-GDA and GDA services is evident. While overall Non-GDA passenger journeys have increased 25% between 2013 and 2019, the estimated number of free travel passenger journeys on these services has changed from 36% in 2013 to 40% in 2019. The estimated number of free travel journeys on these Non-GDA services was highest between 2014 and 2017 at around 42%.

The same is not true of GDA services. While there was a slight increase in free travel journeys on GDA services between 2018 and 2019 from 10% of the passenger journeys to 11%, there had been a decreasing trend reported between 2013 and 2018. The estimated figure changed from 17% of the passenger journeys in 2013 to 10% in 2018, with the percentage reducing each year up to 2018. This is while having a 51% increase in overall commercial passenger journeys over the same period.

These reported changes mean that Non-GDA services increased the percentage share of all free travel passenger journeys from having 54% of all free travel journeys on commercial services in 2013 to having 62% in 2019.

Tables 2F and 2G set out the estimated figures of free travel passenger journeys. Table 2H shows the percentage share of estimated free travel passenger journeys between GDA and Non-GDA services. It should be noted that the free travel figures have been calculated by multiplying the estimated percentage of free travel passenger journeys by the total passenger journeys on the respective routes. The figures should therefore be taken as indicative of trends only, rather than as precise calculations. The percentage of free travel passengers is estimated by the operators.

Table 2F: Estimated Number of Free Travel Passenger Journeys on Commercial Bus Services (in millions)

Year	Non-GDA Services	GDA Services	All Commercial Bus Services Nationally
2013	2.57	2.22	4.79
2014	2.84	1.89	4.73
2015	2.94	1.98	4.92
2016	3.26	2.03	5.29
2017	3.13	2.08	5.21
2018	3.10	1.94	5.04
2019	3.49	2.48	5.97

Table 2G: Estimated Free Travel Passenger Journeys as a Percentage of All Passenger Journeys

Year	Non-GDA Services	GDA Services	All Commercial Bus Services Nationally
2013	36%	17%	24%
2014	42%	13%	23%
2015	42%	13%	22%
2016	43%	12%	21%
2017	42%	11%	20%
2018	39%	10%	18%
2019	40%	11%	20%
Change in Total 2013-2019	35.7%	11.8%	24.6%

Table 2H: Percentage share of Estimated Free Travel Passenger Journeys on Commercial Bus Services

Year	Non-GDA Services	GDA Services
2013	54%	46%
2014	60%	40%
2015	60%	40%
2016	62%	38%
2017	60%	40%
2018	62%	38%
2019	59%	41%

3

Scheduled Vehicle Kilometres

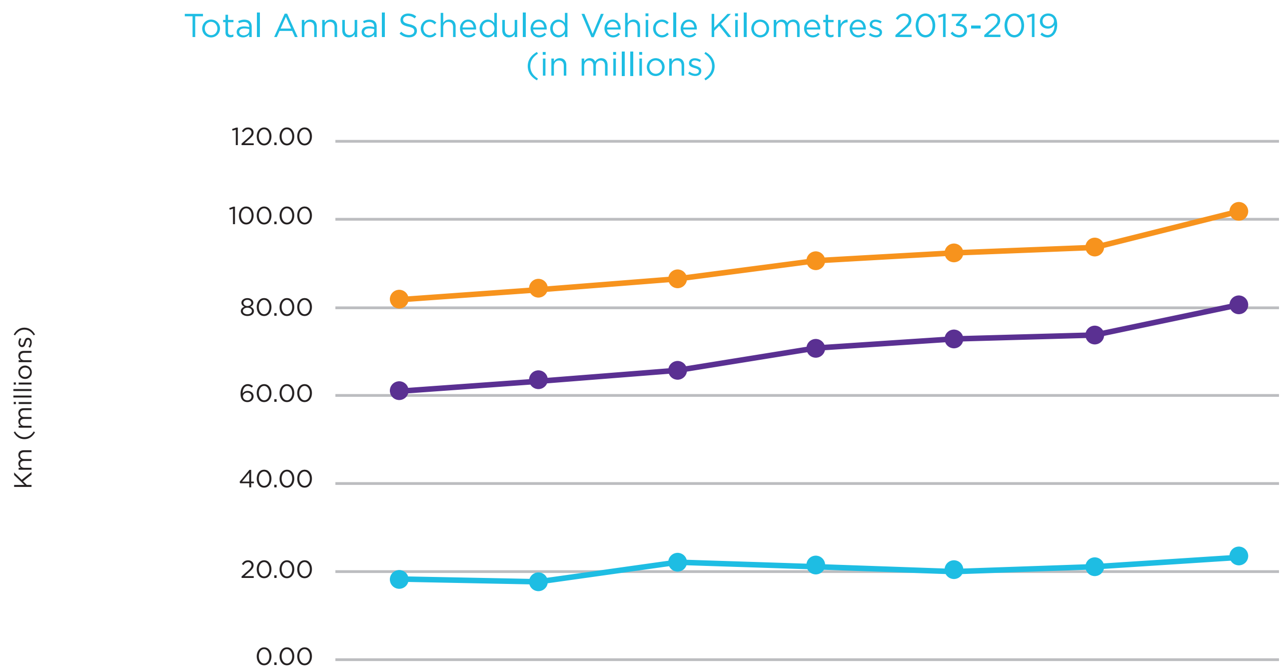
'Scheduled vehicle kilometres' indicate the total number of vehicle kilometres intended to be operated based on the licensed timetables. 2019 had the largest single yearly increase, at 9%, in scheduled vehicle kilometres since 2013 when data was first collected.

Overall scheduled vehicle kilometres have increased by 26% between 2013 and 2019. This increase is less than the 52% increase in passenger journeys over the same period. This gives an indication that increases in scheduled vehicles kilometres have been driven by demand in the market. The increase in scheduled vehicle kilometres is not evenly distributed, with GDA services having increased by 32% during this period while Non-GDA services increased by 7%. Figure 3.1 provides the annual scheduled vehicle kilometres provided by all commercial services, as well as separately by GDA and Non-GDA services from 2013 to 2019. Table 3A shows the overall change per year and the breakdown between GDA and Non-GDA services. Table 3B shows these changes as a percentage. Table 3C compares the overall total change for all transport sectors in vehicle kilometres.

PSO service figures on the operated vehicle kilometres for bus and rail services refer to the actual amount of vehicle kilometres that a bus or rail company operated. Commercial and PSO vehicle kilometres have been compared below. It should be borne in mind that there may be differences between the scheduled and the operated kilometres for a commercial operator.

The proportion of all vehicle kilometres which is provided by commercial bus services has increased slightly from 43.7% in 2013 to 46% in 2019. All public transport sectors are compared in Figures 3.2 and 3.3, which show the total vehicle kilometres for the primary PSO services and commercial bus services.

Figure 3.1: Comparison of Scheduled Vehicle Kilometres for GDA and Non GDA services by Year 2013-2019 (in millions)



	2013	2014	2015	2016	2017	2018	2019
GDA Services	60.27	62.83	65.53	71.68	72.40	72.84	80.06
Non-GDA Services	19.82	19.32	20.75	20.40	20.06	20.28	21.16
Total KM	80.09	82.15	86.28	92.08	92.45	93.11	101.23

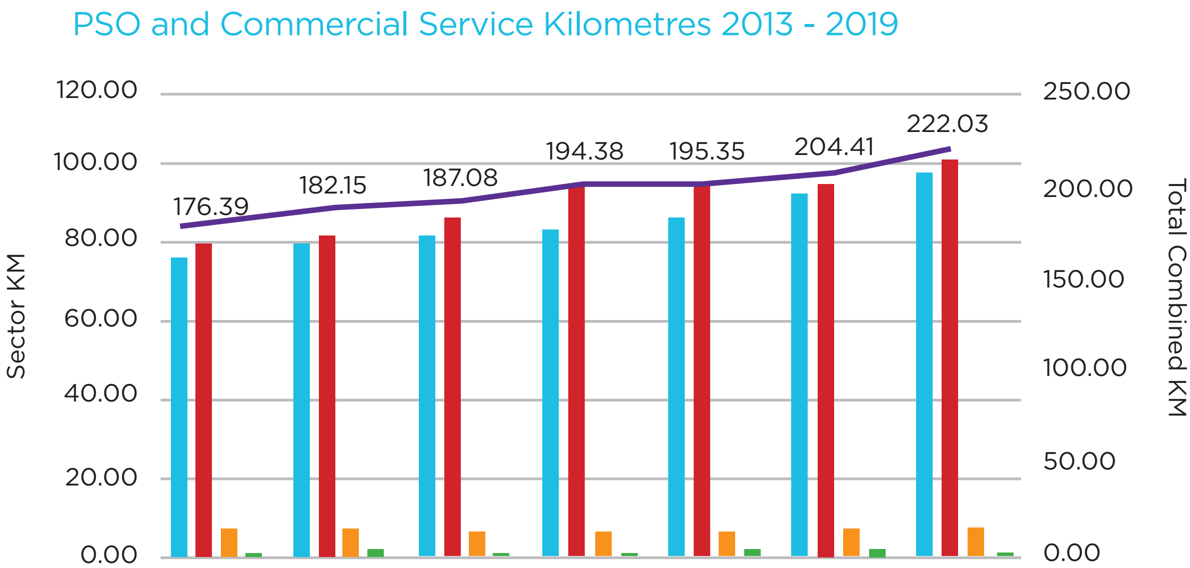
Table 3A: Percentage Breakdown of Total Scheduled Vehicle Kilometres (in millions)

Year	Total Annual Scheduled Km	Percent Change from Previous Year	Non GDA Services	GDA Services	% of Total Non GDA Services	% of Total GDA Services
2013	80.09	-	19.82	60.27	25%	75%
2014	82.15	3%	19.32	62.83	24%	76%
2015	86.28	5%	20.75	65.53	24%	76%
2016	92.08	7%	20.40	71.68	22%	78%
2017	92.45	0%	20.06	72.40	22%	78%
2018	93.11	1%	20.28	72.84	22%	78%
2019	101.23	9%	21.16	80.06	21%	79%

Table 3B: Percentage Change in Scheduled Vehicle Kilometres by Year

Year	Non GDA Services	GDA Services	All Commercial Bus Services
2013	100.0%	100.0%	100%
2014	97.5%	104.3%	102.6%
2015	104.7%	108.7%	107.7%
2016	102.9%	118.9%	115.0%
2017	101.2%	120.1%	115.4%
2018	102.3%	120.9%	116.3%
2019	106.7%	132.8%	126.4%

Figure 3.2: Comparison of Total Vehicle Kilometres by Transport Sector 2013-2019 (in millions)



	2013	2014	2015	2016	2017	2018	2019
Total PSO Bus Services	76.80	80.30	81.20	82.90	84.20	91.00	98.70
Commercial Bus Services	80.90	82.15	86.28	92.08	92.45	93.11	101.23
Total PSO Rail Services	15.967	15.965	15.965	16.0	15.0	16.2	17.7
Total PSO Light Rail Services	3.5	3.7	3.7	3.5	3.7	4.1	4.4
Total Public Transport KM	176.39	182.15	187.08	194.38	195.35	204.41	222.03

Table 3C: Comparison of the Overall Total Change in Vehicle Kilometres by Year 2013-2019

Year	Total KM All Services	Change in KM between Years	Percent Change Per Year	Increase in KM since 2013	Percent Change since 2013
2013	176.39	-	-	-	-
2014	182.15	5.77	3%	5.77	3%
2015	187.08	4.93	3%	10.70	6%
2016	194.38	7.30	4%	18.00	10%
2017	195.35	0.97	0%	18.97	11%
2018	204.41	9.06	5%	28.03	16%
2019	222.03	17.62	9%	45.64	26%

Figure 3.3: Comparison of Change in Total Vehicle Kilometres by Transport Sector 2013-2019

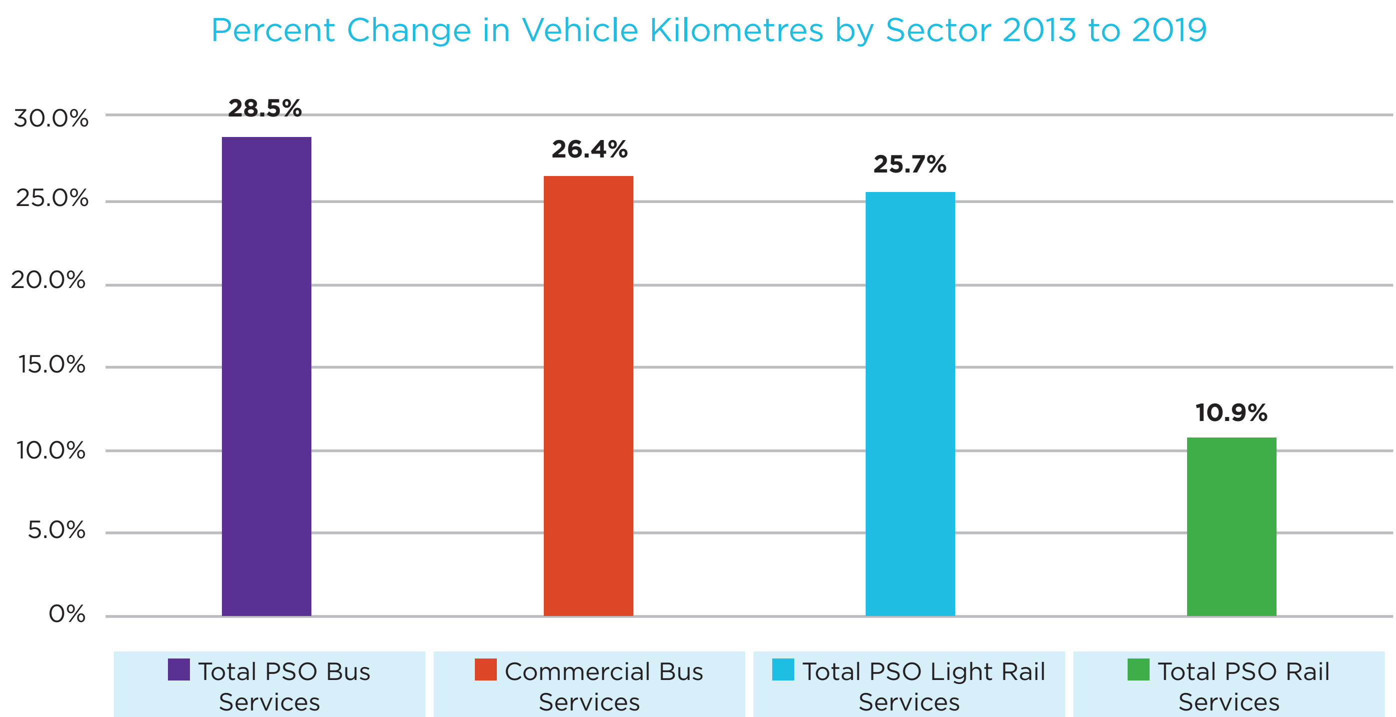
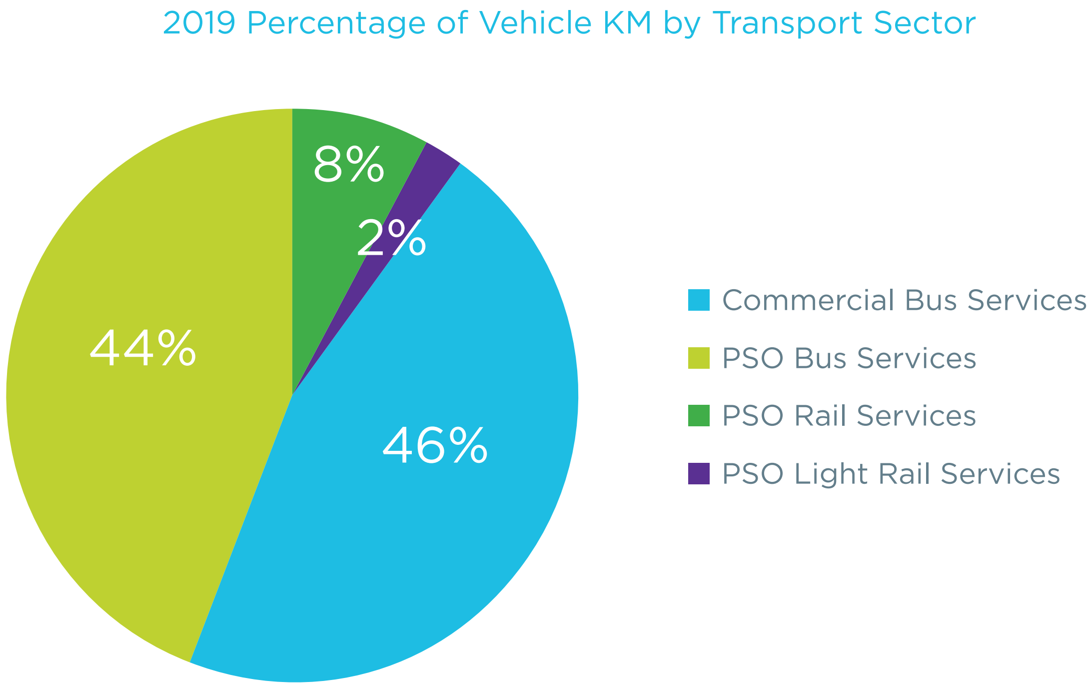


Figure 3.4: Percentage of all Vehicle Kilometres by Transport Sector



4

Commercial Bus Services Revenue and Ticketing

Commercial bus service revenue consists of all revenue from ticket sales, including cash, TaxSaver, Leap card, online, and prepaid tickets, as well as payments to operators participating in the Department of Social Protection's Free Travel Scheme.

In 2019, ticket revenue accounted for over 85% of all revenue, with Free Travel Scheme payments accounting for 15%. This is the same as in 2013. As stated above in section 2 the estimated number of free travel passenger journeys on commercial bus services has reduced from an estimated 24% of all passenger journeys in 2013, to an estimated 20% in 2019.

TaxSaver Ticketing

The TaxSaver Commuter Ticket Scheme allows employees to avail of public transport commuter tickets if they are travelling to work by public transport. The scheme involves employers providing employees with public transport commuter tickets, while saving on employer PRSI payments. Employees participating in the scheme benefit from reduced tax and PRSI payments. The scheme is generally known as the TaxSaver scheme but other names can be used by individual public transport operators.

The percentage of operators offering TaxSaver Ticketing in 2019 was 26%. This has increased from 14% in 2013 and the previous high of 25% in 2017. See Table 4C.

Leap Card

The Leap Card was introduced in late 2011 and is an integrated smart card which is available for both PSO services and commercial bus services. There were 13 commercial operators in 2019 which accepted Leap Card on their commercial bus services. These were St. Kevin's Bus, Ashbourne Connect, Dualway Coaches, City Direct Galway, Citylink, Collins Coaches, Express Bus, Matthews Coaches, Swords Express, Wexford Bus, Mortons Coaches, Dublin Bus, and Bus Éireann.

Free Travel Revenue

Operators that are part of the Department Social Protection's Free Travel Scheme receive payments for the fare forgone for carrying passengers entitled to free travel.

Overall Free Travel Scheme payments to commercial operators are set out below. These include payments for free travel within the State for both Irish and Northern Irish passengers, as well as payments for cross border free travel.

Table 4A shows the total ticket revenue and Free Travel Scheme payments for the commercial bus services sector between 2013 and 2019. This includes figures for commercial services provided by Bus Éireann Expressway and Dublin Bus Airlink. Figure 4.1 shows the payments as a percentage of the total revenue. The Free Travel Scheme payments are inclusive of payments for cross border travel and international foreign free travel payments.

Table 4B shows the percentage change in revenue per year with changes in passenger journeys; scheduled vehicle kilometres are included for comparative purposes. Table 4C shows the number of operators offering TaxSaver Ticketing.

Table 4A: Commercial Bus Services Annual Passenger Revenue (in millions)

Year	Total Annual Ticket Revenue (€)	Total Annual FT Payments (€)	Total Revenue (€)	Change in Total Revenue per Year	FT Payments as a Percent of All Passenger Revenue
2013	€115.89	€20.05	€135.94	-	15%
2014	€129.55	€20.10	€149.65	10%	13%
2015	€143.19	€20.42	€163.61	9%	12%
2016	€155.62	€20.49	€176.11	8%	12%
2017	€157.69	€20.10	€177.78	1%	11%
2018	€173.88	€29.79	€203.67	15%	15%
2019	€185.96	€33.42	€219.38	8%	15%

Figure 4.1: Commercial Bus Services Comparison of Revenue Types by Year 2013-2019

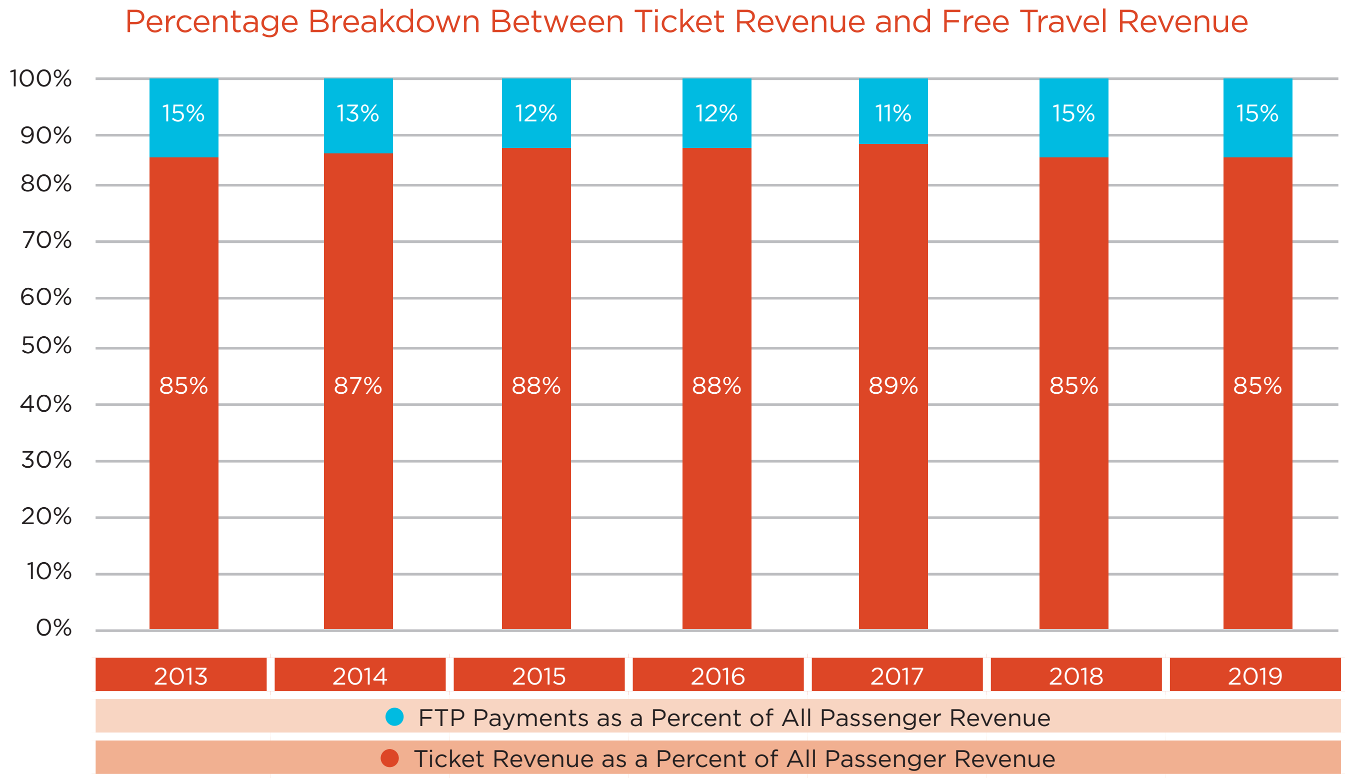


Table 4B: Percentage Change per Year for Total Passenger Journeys, Scheduled Vehicle Kilometres and Ticket Revenue (Commercial Bus Services)

Year	Passenger Journeys	Vehicle Kilometres	Ticket Revenue
2014	3.3%	2.6%	11.8%
2015	9.6%	5.0%	10.5%
2016	11.0%	6.7%	8.7%
2017	2.1%	0.3%	1.3%
2018	6.7%	0.7%	10.3%
2019	10.9%	8.7%	6.9%

Table 4C: Number of Commercial Operators Offering one or more TaxSaver Tickets

Year	Operators Offering 1 or More TaxSaver Tickets	Percentage of All Active Operators Offering TaxSaver Tickets
2013	17	14%
2014	27	21%
2015	25	20%
2016	28	23%
2017	31	25%
2018	30	24%
2019	34	26%

5

Commercial Operator Fleet Size

The total number of vehicles that were used in 2019 to provide commercial bus services in the State was 1,264. The Authority asked commercial operators whether their vehicles were also used for other activities, to show not only how many vehicles operators used to provide their commercial bus services, but also how much these vehicles were used solely for operating these services.

As an example, if an operator had one vehicle and this vehicle was used 70% of the time for commercial bus services and 30% of the time for school transport services, then the operator would report that as 0.7 of a vehicle. Using this method of calculation there were 1,097 vehicles used on a full time basis to provide commercial bus services. This is an increase of 126 vehicles since 2013 providing these services on a full time basis. See Table 5A below.

A question was included for the first time in 2019 on the Daily Peak Vehicle Requirement per licence. It is important to keep in mind that some commercial bus services do not operate on a daily basis or year round basis, e.g. college term only services. See Table 5B below.

Operators were also asked to provide the total number of vehicles counted. This provides information on the number of vehicles available and used to provide commercial bus services. Figure 5.1 charts the percentage of operators against the total number of vehicles counted. The percentage is based on the total number of vehicles counted by operators.

The vehicles referred to include a broad variety of vehicles, such as inter-city coaches, low-floor urban double and single decker buses, and midi and mini buses. These vehicles have a wide range of passenger seat capacities.

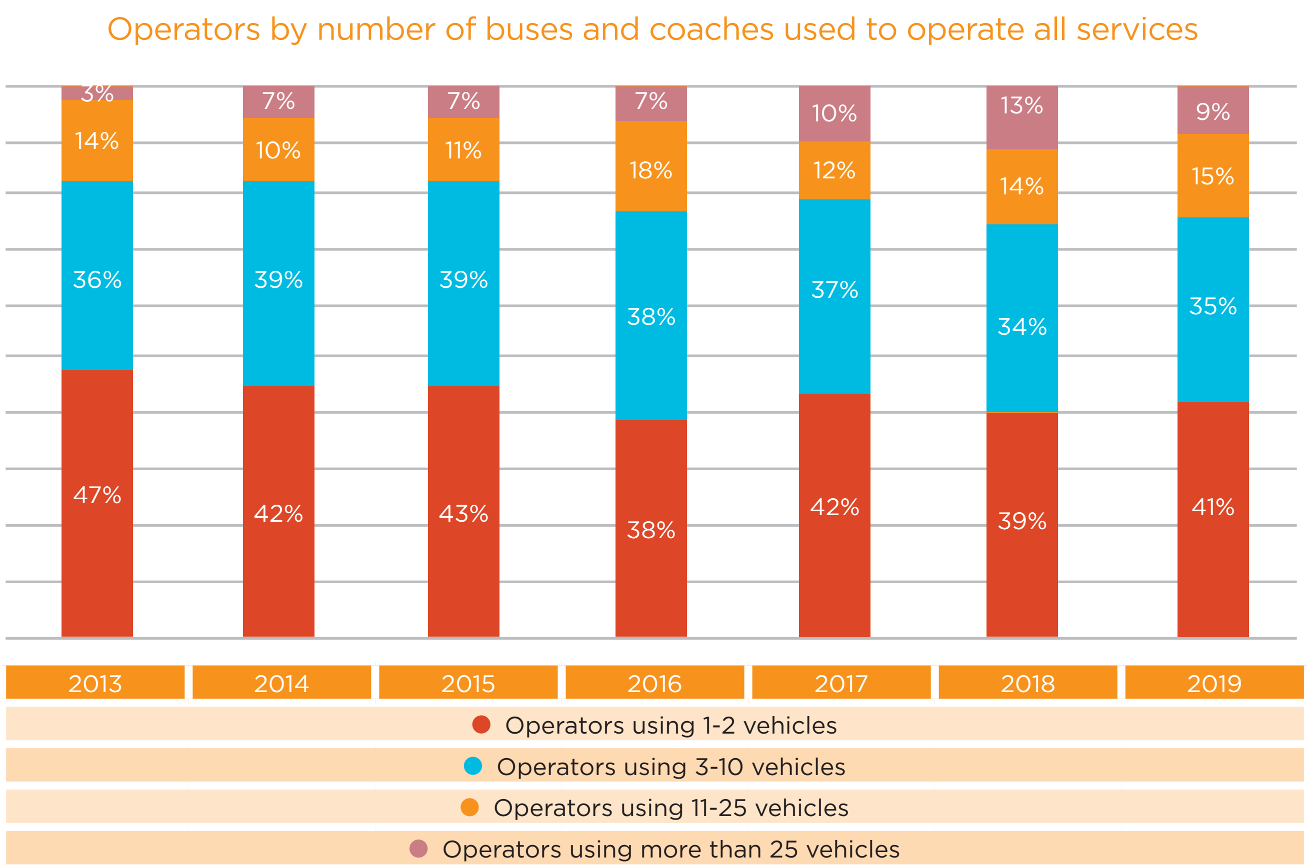
Table 5A: Total Number of Vehicles used to provide Commercial Bus Services

Number of Vehicles/ Year	2013	2014	2015	2016	2017	2018	2019
Number of vehicles used on full time basis	969	1,037	994	1,125	1,177	1,096	1,097
Number of vehicles counted	1,062	1,227	1,223	1,371	1,389	1,325	1,264

Table 5B: Daily Peak Vehicle Requirement used to provide Commercial Bus Services

Year	Nationally	Non-GDA Services	GDA Services
2018	868	357	511
2019	899	353	546

Figure 5.1: Comparison of Operators Total Number of Vehicles used by Year 2013-2019



6

Accessibility of Operating Fleet and Scheduled Vehicle Kilometres Provided

There are two key indicators of the accessibility of a fleet. These are the percentage of vehicles in a fleet which are accessible, and the proportion of all the scheduled vehicle kilometres these vehicles are used to provide. In 2019, the percentage of scheduled kilometres provided by accessible vehicles was requested on a per licence basis. This provided for a more detailed view of the proportion of scheduled kilometres provided by accessible vehicles. Accessible vehicles provided approximately 59% of all scheduled vehicle kilometres in 2019, down from 60% in 2018.

Wheelchair Accessibility

The wheelchair accessibility of the commercial bus services fleet is examined below. It is important to highlight that a vehicle can be either low-floor wheelchair accessible or wheelchair accessible through the use of a lift. There are differences in the accessibility standard of a vehicle for users depending on whether the vehicle is a low-floor vehicle or has a wheelchair lift. There are a small number of vehicles within the fleet that are accessible to wheelchairs by being both low-floor and having the use of a lift. Such vehicles have been counted as one accessible vehicle.

Operators reported on the percentage of each commercial bus service which was provided by vehicles which were wheelchair accessible either by a low-floor or by having the use of a lift.

The number of accessible vehicles has gradually increased since 2013, with 239 more accessible vehicles in use in 2019 than in 2013. Accessible vehicles represented 52% of the total fleet in 2019 up from 42% in 2013. Vehicles with wheelchair lifts represent the dominant type of accessible vehicles being used to provide commercial bus services. While the overall number of accessible vehicles changed from 445 to 684, the greatest share was vehicles with wheelchair lifts. These accounted for 145 or 61% of the additional accessible vehicles, the remaining 94 vehicles being low-floor type vehicles. The differences between the accessibility of the vehicles are set out in Figure 6.1 and Table 6A.

However, the total scheduled vehicle kilometres provided by such vehicles has increased at a greater rate over the 2013 to 2019 period, growing from 40% to 59%. The percentage of all vehicles that are accessible has changed from 42% to 52% in the same period. This indicates that more use of these vehicles is being made to provide licensed public transport.

Low-Floor Vehicles Suitable for Wheelchair Access

Low-floor vehicles accounted for 17% of the total vehicles reported being used in 2019.

These vehicle types provided 12% of all scheduled vehicle kilometres nationally. Low-floor wheelchair accessible vehicles are vehicles where access from the bus stop to part or all of the on board passenger area is direct from the bus stop apron. There are no steps involved and a wheelchair lift is not used.

Alternatively, the vehicle may lower to kerb level and there may be an entry and exit access ramp for quick and safe wheelchair access. This enables easier access for wheelchair users and those with limited mobility. Accessing low-floor vehicles may also require that appropriate bus stop infrastructure, for instance kerbing of a specific height, is in place.

Vehicles with Lifts Suitable for Wheelchair Access

Vehicles with wheelchair lifts accounted for 34% of the total vehicles reported as being used in 2019. These vehicle types provided 48% of the scheduled kilometres nationally. Vehicles with wheelchair lifts raise the individual and wheelchair above the steps of the vehicle and into the coach corridor area. This feature requires a deep space at the footpath which may not be always available. The use of wheelchair lifts increases the dwell time at bus stops and may not be as preferable for the passenger as the low-floor, roll-on, roll-off option. Vehicles with wheelchair lifts are often only able to carry one passenger using a wheelchair at any given time as only one designated wheelchair space may be available.

It can also be the case that the customer using a wheelchair may need to inform the operator in advance that they wish to use the service, as vehicle seating may need to be removed to provide for a designated wheelchair space.

Scheduled Vehicle Kilometres Operated by Wheelchair Accessible Vehicles

Estimates of the scheduled vehicle kilometres operated by wheelchair accessible vehicles for the years 2013 to 2018 have been set out in Tables 6B to 6D. Figures between 2013 and 2017 were estimated on an overall fleet basis, while for 2018 and 2019 calculations were done on a per licence basis.

Nationally the figures indicate that three out of every five scheduled vehicle kilometres provided by commercial bus services were wheelchair accessible. This is up from two out of every five scheduled vehicle kilometres in 2013. In particular, Table 6D shows the percentage of all scheduled vehicle kilometres operated using 100% accessible vehicles and the percentage using 0%.

The figures set out below are derived from estimations by operators. They are intended to be read to illustrate trends and not as exact calculations.

Figure 6.1: Comparison of Accessibility Level of Vehicles used by Year 2013-2019

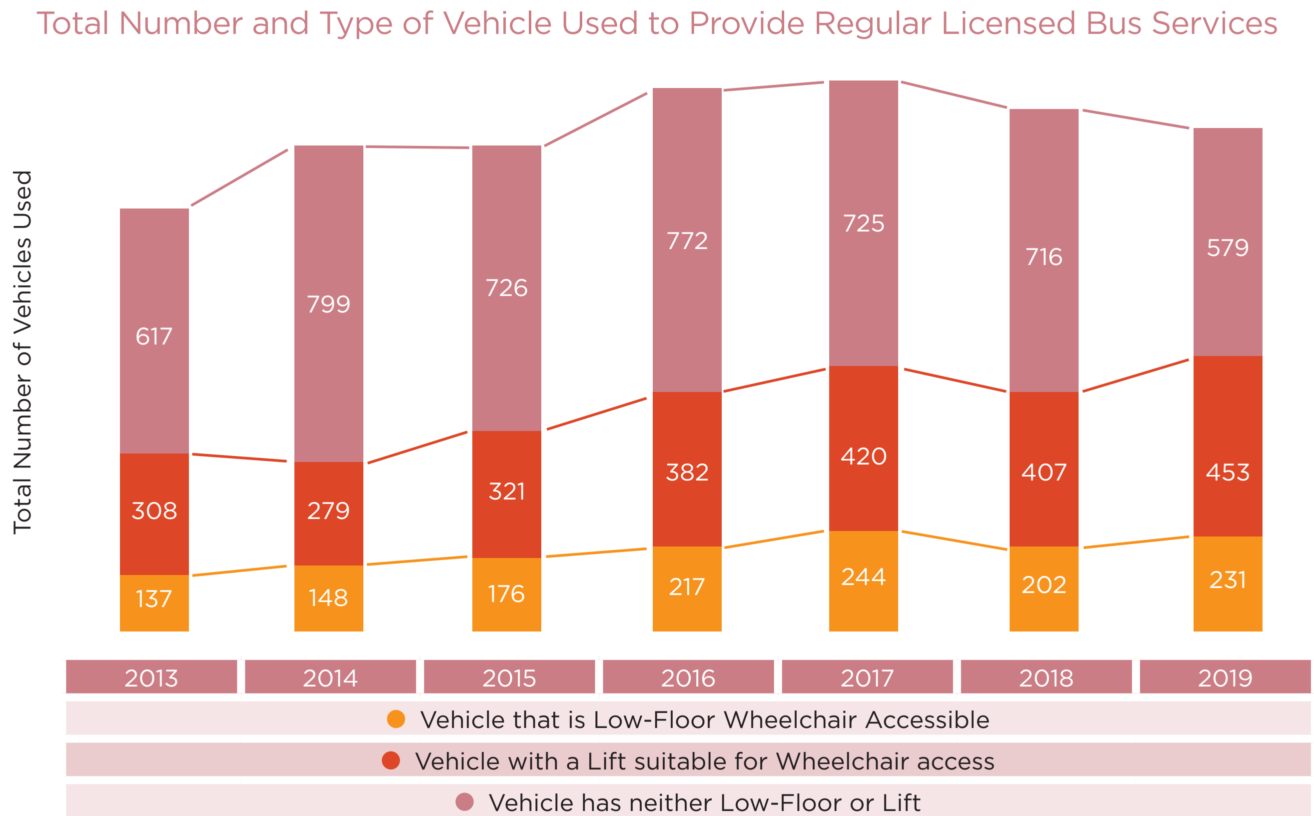


Table 6A: Overall Fleet Percentage of Accessible Vehicles

Year	Vehicles that are Low-Floor Wheelchair Accessible	Vehicles with Lifts suitable for Wheelchair access	All Accessible Vehicles	Vehicles used Neither Low-Floor or with Lifts
2013	13%	29%	42%	58%
2014	12%	23%	35%	65%
2015	14%	26%	41%	59%
2016	16%	28%	44%	56%
2017	18%	30%	48%	52%
2018	15%	31%	46%	54%
2019	17%	34%	52%	46%

Table 6B: Estimation of 2019 Accessible Scheduled Vehicle Kilometres by Area and Type of Vehicle based on a per licence basis

2019 KM/Area Operated	Nationally	Non-GDA Services	GDA Services
Total Accessible Vehicle Km Operated	59%	62%	58%
Accessible Km Operated by Low-Floor vehicles	12%	13%	12%
Accessible Km Operated by vehicles with lifts for wheelchairs	48%	49%	48%

Table 6C: Estimation of 2018-2019 Total Scheduled Vehicle Kilometres provided by Accessible Vehicles

Year	Total Scheduled Vehicle KM Nationally	Estimated Accessible KM	Percent of Total
2018	93.1	56.0	60%
2019	101.2	59.6	59%

Table 6D: Estimation of Scheduled Vehicle Kilometres provided by Accessible Vehicles

Service KM provided by All Accessible Vehicles/No Accessible Vehicles	2018 KM Nationally	2019 KM Nationally
Percent of Total Annual Km provided by 100% Accessible Vehicles	44%	54%
Percent of Total Annual Km provided by 0% Accessible Vehicles	30%	35%

7

Commercial Operating Fleet with Automated Vehicle Location Systems

Automated 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 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 vehicles are at any given time, and facilitates the provision of real time passenger information (RTPI).

The number of vehicles providing commercial bus services equipped with AVL systems decreased from 76% of all vehicles used in 2018 to 72% in 2019. See Table 7A.

It should be noted that although AVL systems may be of benefit to an individual operator, only specific AVL systems are compatible to the State's RTPI facility that is available through on-street displays, apps or SMS service etc. Therefore, having vehicles with AVL on board would not be a sufficient guide as to whether these services could participate in the RTPI facility.

Table 7A: Number of Vehicles with AVL

Year	Number of Vehicles with AVL	Percentage of Vehicles with AVL	Total Number of Vehicles used
2013	639	60%	1,062
2014	812	66%	1,227
2015	807	66%	1,223
2016	960	70%	1,371
2017	1,038	75%	1,389
2018	1,012	76%	1,325
2019	904	72%	1,264

8

Commercial Fleet Age

The average age of vehicles providing commercial bus services has remained low. The average age increased slightly between the years 2014 to 2017 but has decreased since. In 2019 the average age was 6.8 years. See Figure 8.1.

The age profile of vehicles has been broken down into three categories by the size of the fleet used. This was done for operators where 1 to 10 vehicles are used, 11 to 40 vehicles are used, and where over 40 vehicles are used. It can be seen from this that, since 2017, the average age of vehicles used full time has decreased for each operator size.

This indicates significant investment in the commercial fleet by commercial operators which has seen increases in the fleet size by over 19% in seven years, with operators maintaining a low average vehicle age, or actually decreasing it. See Figure 8.2.

The average age of a fleet is an important measure as the age of a vehicle can influence accessibility standards, vehicle emission levels, fuel efficiency, vehicle safety features, maintenance requirements, and reliability. Vehicle age can have material impact on maintaining current service user levels, as well as attracting new users to a service, as passengers can have a preference for travelling on newer vehicles with enhanced features and designs.

Figure 8.1: Average Age (in years) of Vehicles used to provide Commercial Bus Services 2013-2019

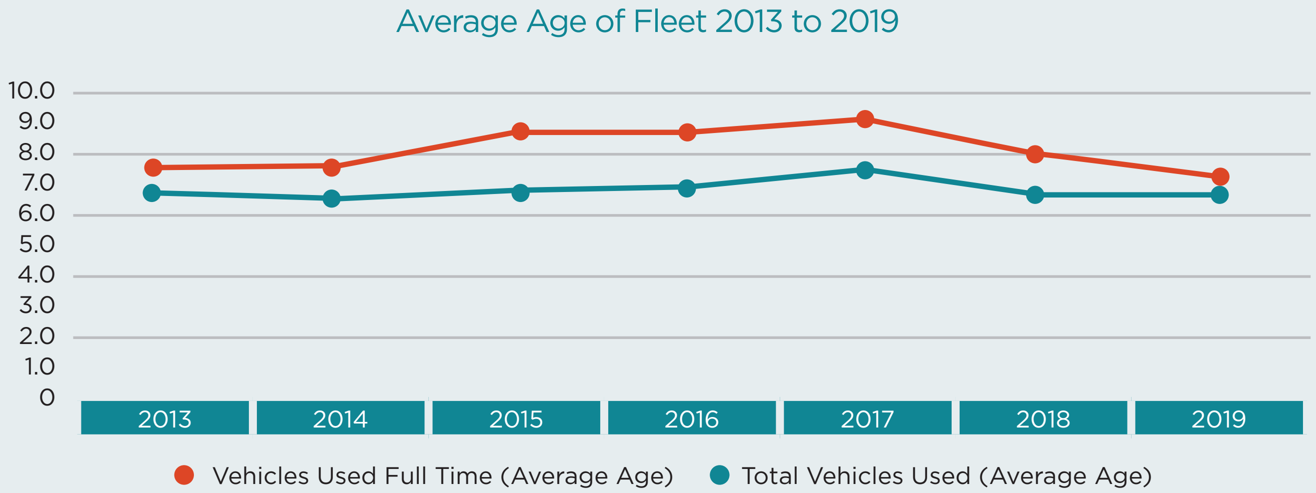


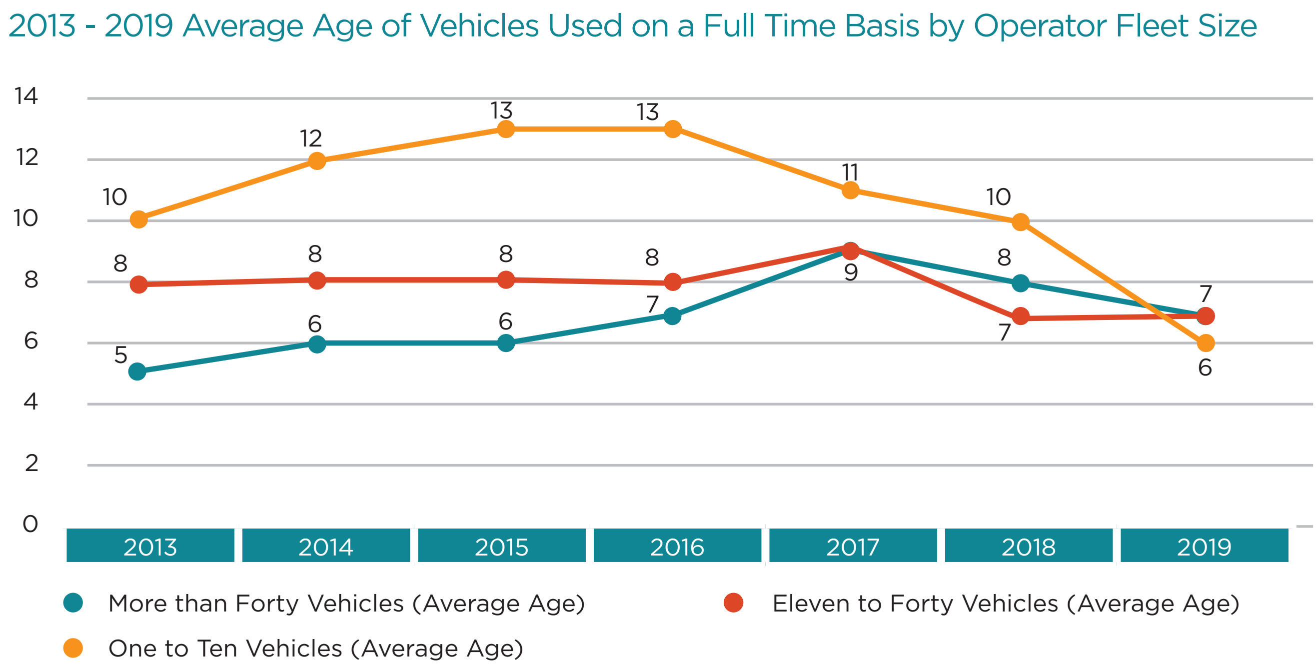
Table 8A: Average Age (in years) of Total Fleet of Vehicles used to provide Commercial Bus Services

Year	Average Vehicle Age in Years	Total Number of Vehicles used
2013	6.8	1,062
2014	6.6	1,227
2015	6.8	1,223
2016	7.0	1,371
2017	7.8	1,389
2018	6.6	1,325
2019	6.8	1,264

Table 8B: Average Age (in years) of Vehicles Used on a Full Time Basis to provide Commercial Bus Services

Year	Average Vehicle Age (Years)	Total Number of Vehicles used
2013	7.5	969
2014	7.8	1,037
2015	8.5	994
2016	8.6	1,125
2017	9.2	1,177
2018	8.0	1,096
2019	7.3	1,097

Figure 8.2: Average Age (in years) of Vehicles used by Operator Fleet Size (Full Time Vehicles) 2013-2019



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