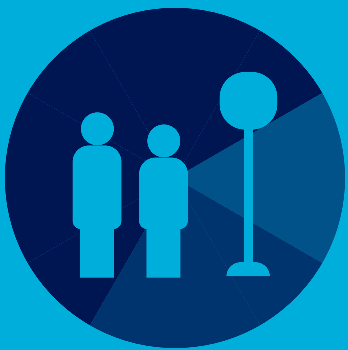
Údarás Náisiúnta Iompair
National Transport Authority

Statistical Bulletin Number: 04 / 2015
September 2015

Commercial Bus Services in Ireland (2014 statistics)



Bulletin Topics:

- Number of operators
- Passenger journeys
- Scheduled vehicle kilometres
- Number and age of buses
- Automatic Vehicle Location (AVL) systems
- Smartcard reading equipment
- Wheelchair accessibility
- Passenger revenue
- Free Travel Scheme revenue and passenger journeys
- Total public transport passenger numbers in Ireland

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 operating to a regular schedule in Ireland for the year 2014. The Authority did 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) because of the ad hoc and irregular nature of these services.

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, amended by section 75 of the Taxi Regulation Act 2013, the Authority is required to "collect, compile, analyse and prepare information, data or statistics" regarding public transport services in Ireland.

The bus services covered by this bulletin include any licensed service with an origin, intermediate point, or a destination within Ireland (i.e. essentially any service travelling through any part of the State). Bus services subject to an authorisation that are travelling to, from or through Northern Ireland and then into this State are also included in the bulletin.

The data in this bulletin covers statistical information for all operators providing licensed services across the State for the years 2013 and 2014 and the Greater Dublin Area (GDA) [1] for the years 2012 to 2014 for comparative purposes. High level information on Public Service Obligation (PSO) services, which are subsidised services provided under contract to the Authority, has also been included for comparative purposes.

This will be the second year that data has been provided by all licensed operators running services with an origin, intermediate point, or destination in the State. For operators who have services within the GDA this will be the third year that they have supplied data.

1 The Greater Dublin Area comprises the city of Dublin and the county council areas of South Dublin, Fingal, Dún Laoghaire-Rathdown, Kildare, Wicklow and Meath

Note that the GDA refers to any service travelling to, from or through any of the GDA counties; the 'Rest of the State' refers to any service travelling to, from or through any of the counties in the State other than Dublin, Meath, Wicklow or Kildare; and, 'Nationally' refers to all services running to, from or through the State, and these are the meanings assigned to them throughout the document unless otherwise stated.

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, M&A Coaches, Whartons Travel Ltd 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.

Statistical Qualification - it is important to note that the figures used in this bulletin are provided by the operators and are intended to illustrate general 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 being used and this could affect overall percentages.

These statistics have only been collected once previously for services operating outside of the GDA and twice for services in the GDA. In repeating this process annually, operators will be able to refine their reporting methods which should strengthen the validation and quality of the data.

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

Acknowledgement
The 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. **A 99% return** was achieved from all operators with active licences due to one company going into liquidation during the second quarter of 2014. A 100% return was achieved in 2013.

Licensed Bus Passenger Services Nationally

Licensed bus services

2013
20.1 million

2014
20.6 million

↑2.7%

All modes of public transport: passenger journeys in millions (including Rail and School Services)

2013
271.3 million

2014
282.7 million

↑4.2%

2014 versus 2013

Annual scheduled vehicle kilometres ↑2.3%

Average age of fleet down by 0.2 years to 6.6 years

Number of buses providing services ↑15.1%

Table of Contents

1

Number of Operators

There were 133 operators with licences and authorisations to provide bus services within or through the State in 2014. Of these operators 127 had active licences and provided their transport returns. There were 3 new market entrants who had not operated in the previous year.

Five operators had no data returns as they had not commenced services licensed in 2014, they were no longer operating any services in or through the State, or had licences for tours or social club events, et cetera and the Authority did not request this data. One operator had gone into liquidation and the data was no longer available.

It should be noted that a 99% return was achieved from all operators with active licences. The Authority revokes non-active licences.

It is important to highlight that there is a large variability in the scale and type of services provided by operators. The 127 active operators include large scale inter-city and interurban services that 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; as well as rural services that generally link small towns, villages and rural areas. The operators provide a wide range of service frequency from several services per day each day of the week to one service per week.

Table 1

Year	No of operators with licences	No of operators with active licences
2013	145	124
2014	133	127

2

Total number of passenger journeys

Total passenger journeys nationally have increased between 2013 and 2014 however, outside the GDA, journeys have declined.

Tables 2A and 2B along with Figure 2.1 highlight the details of licensed passenger journeys between 2012 and 2014. Tables 2C and 2D show licensed commercial public bus passenger journeys across the State 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.

Table 2E shows the percentage change of the total annual passenger journeys by both the PSO and licensed commercial services from 2013 figures.

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 bulletin no. 01/2015, which likewise refers to 2014 data.

As can be seen in Table 2C, **licensed commercial bus passenger numbers represent about 12% of the total passenger journeys.** This is the same percentage as 2013. While the number of commercial bus passengers has increased between 2013 and 2014 so have the number of PSO passengers.

The percentage of licensed commercial bus passenger numbers is diluted by the large number of Dublin Bus passenger journeys (116.26 million in 2014). A comparison excluding Dublin Bus PSO numbers is presented in Table 2D and shows that excluding Dublin Bus PSO services, licensed services accounted for 40% of passenger journeys in 2014.

Table 2E shows the overall national growth in passenger journeys between 2013 and 2014.

Table 2A
Annual passenger journeys (millions)

	2012	2013	2014	% Change from 2013
Licensed bus services (GDA)	12.91	12.88	13.92	8.09%
Licensed bus services (Rest of State)	-	7.21	6.71	-7.02%
Licensed bus services (Nationally)	-	20.09	20.63	2.67%

Table 2B
Percentage breakdown in the State of 2013 and 2014 annual passenger journeys

	2013	2014
Licensed bus services (GDA)	64.11%	67.49%
Licensed bus services (Rest of State)	35.89%	32.51%
Licensed bus services (Nationally)	100%	100%

It should be noted that Bus Éireann revised their passenger journey data for 2013 following a review of their method of calculating passenger journeys.

Figure 2.1
Licensed annual bus passenger journeys (millions) 2012 to 2014

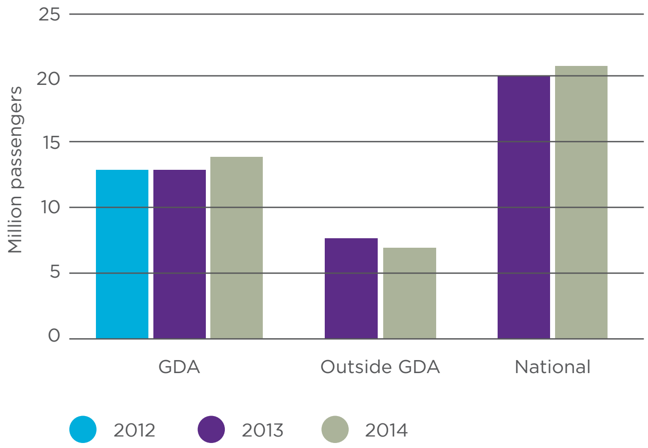


Table 2C
Comparison of licensed and PSO in annual passenger journeys (millions)

	2013	Percentage Split	2014	Percentage Split
Licensed bus services (nationally)	20.09	12.33%	20.63	12.25%
PSO bus services (nationally)*	142.87	87.67%	147.72	87.75%
Total	162.96	100%	168.35	100%

**Note: PSO services here refer to Dublin Bus, Bus Éireann, M&A Coaches, Whartons Travel Ltd and Rural Transport Programme (RTP) services*

Table 2D
Comparison of licensed and PSO annual passenger journeys (millions) excluding Dublin Bus PSO services

	2013	Percentage Split	2014	Percentage Split
Licensed bus services (nationally)	20.09	39.80%	20.63	39.60%
PSO bus services (nationally excl. Dublin Bus)*	30.38	60.20%	31.47	60.40%
Total	50.47	100%	52.10	100.00%

**Note: PSO services here refer to Bus Éireann, M&A Coaches, Whartons Travel Ltd and Rural Transport Programme (RTP) services*

Table 2E
Comparison of licensed and PSO changes between 2013 and 2014 in annual passenger journeys (millions)

	journeys in millions	% Change from 2013
Licensed bus services increase on 2013 figures (Nationally)	0.54	2.67%
PSO bus services increase on 2013 figures (Nationally)*	4.84	3.39%

**Note: PSO services here refer to Dublin Bus, Bus Éireann, M&A Coaches, Whartons Travel Ltd 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 as per their cumulative timetables.

Tables 3A and 3B along with Figure 3.1 illustrate the summary of annual licensed scheduled vehicle kilometres between 2012 and 2014. Table 3C shows annual licensed commercial scheduled vehicle kilometres in comparison to Public Service Obligations (PSO) bus services across the State excluding Rural Transport, of which many services are demand responsive and the vehicle kilometres vary from day to day.

As illustrated by Table 3A there has been an overall increase in annual scheduled vehicles kilometres for licensed services travelling to, from or through the GDA between the years 2012 and 2014. There has been a decrease in the scheduled vehicles kilometres for licensed services travelling in the rest of the state between 2013 and 2014. Again as with passenger journeys, individual operators and routes have seen increases and decreases between these years.

As can be seen in Table 3C **licensed bus annual scheduled vehicle kilometres represent just over 50% of the total licensed and PSO bus figure,** which is an increase on the previous year. This 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 numbers above, these figures show a much higher percentage for licensed services when comparing licensed and PSO scheduled vehicle kilometres.

Table 3A
Annual scheduled vehicle kilometres (millions)

Annual scheduled vehicle kilometres (millions)	2012	2013	2014	% Change on previous year
Licensed bus services (GDA)	57.19	60.13	62.98	4.74%
Licensed bus services (Rest of State)	-	20.07	19.05	-5.09%
Licensed bus services 2014 (Nationally)	-	80.20	82.03	2.28%

Note: The GDA refers to any service travelling to, from or through any of the GDA counties, and 'Nationally' refers to all services running to, from or through the State.

Table 3B
Percentage breakdown in the State of total vehicle kilometres for 2013 and 2014

	2013	2014
Licensed bus services (GDA)	74.98%	76.78%
Licensed bus services (Rest of State)	25.02%	23.21%
Licensed bus services (Ireland)	100%	100%

Figure 3.1
Licensed annual scheduled vehicle kilometres (millions) 2012 to 2014

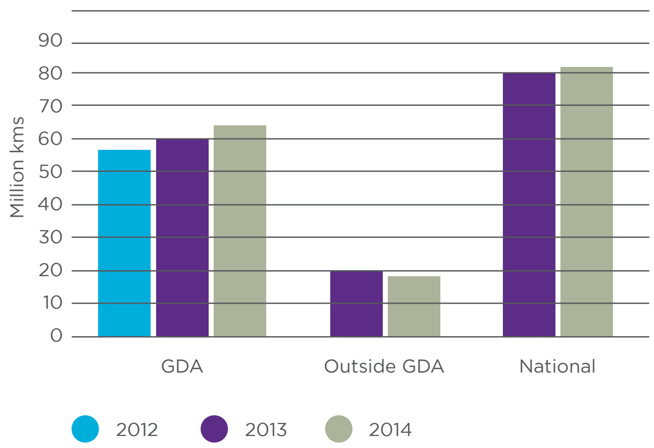


Table 3C
Comparison of licensed and PSO annual scheduled vehicle kilometres (millions)

	2013	Percentage Split	2014	Percentage Split
Licensed bus services (Nationally)	80.20	48.19%	82.03	50.12%
PSO bus services (Nationally)*	86.24	51.81%	81.65	49.88%
Total	166.44	100%	163.67	100%

**Note: PSO services here refer to Dublin Bus and Bus Éireann only*

4

Numbers of buses used to provide licensed services

The number of buses that are used to provide licensed bus services in the State is 1,222 as outlined in Table 4A. The Authority also asked licensed operators whether their buses were also used for other activities as well, to show the extent to which these buses were used solely for running their licensed services.

For example, if an operator had just one bus and this bus was used 70% of the time for regular licenced services and 30% of the time for private hire services, then the operator would just count that as 0.7 of a vehicle when reporting their exact number of buses used. Using this method of calculation, there were 1,222 buses used for providing licensed services of which 1032 buses (84.5 %) were solely used for providing licensed services.

It must be noted that the format for collecting data on fleet size and age changed between 2013 and 2014 and some discrepancies may have occurred.

Table 4A
Numbers of buses used to provide services

Classification	Number of buses
Number of buses used to provide regular services irrespective of whether partially or fully allocated to the licensed services	1222
Number of buses operated solely to provide regular licensed services	1032

The licensed buses referred to in the tables include a broad variety of vehicles, such as inter-city coaches, low-floor urban double and single decker buses, as well as midi and mini buses. These buses have a range of different vehicle designs and numbers of seats and the buses are generally used to suit the type of route being served.

The PSO bus details referred to in Tables 3B, 3C and Figure 3 relate to Dublin Bus and Bus Éireann only and show their bus numbers that applied at the end of 2014. 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 4B
Numbers of buses used to provide licensed and PSO services

	2013	2014
Licensed bus services (Nationally)	1,062	1,222
PSO bus services (Nationally)	1,360	1,375
Total numbers of buses providing services	2,422	2,597

Table 4C
Percentage of total number of buses used to provide services

	2013	2014
Licensed bus services (Nationally)	43.85%	47.05%
PSO bus services (Nationally)	56.15%	52.95%
Total numbers of buses providing services	100.00%	100.00%

Figure 4.1
Number of buses used to provide services

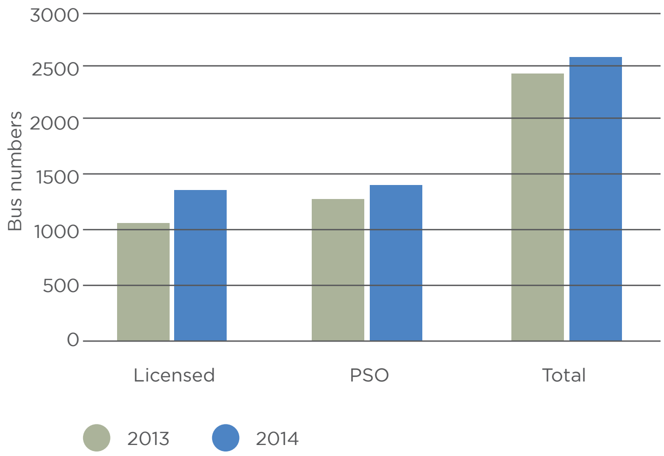


Table 4D
Number of buses used to provide commercial services by operator's fleet size

	2013	% Total Fleet	2014	% Total Fleet
Largest* 5 operators	500	47%	**559**	**46%**
Percentage of total operators	4%		**4%**	
Largest* 10 operators	608	57%	**697**	**57%**
Percentage of total operators	**8%**		**8%**	
All licensed operators number of buses	**1062**		**1222**	

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

Table 4E
Number of buses used to provide services by operator's fleet size

	2013	% Total Fleet	2014	% Total Fleet
Number of operators with one bus only	32	25.81%	22	17%
Number of operators with two buses only	52	41.94%	29	23%
Number of operators with three buses only	-	-	11	9%
Number of operators with three buses or fewer	-	-	62	49%
Total number of active operators	124		127	

5

Average age of the licensed bus fleet

The average age of a bus fleet is an important measure as the age of a bus can influence: accessibility standards, vehicle emission levels, fuel efficiency, vehicle safety features, bus maintenance requirements, reliability, and ability to maintain and attract passengers.

As mentioned in section 4, there are 1,222 buses used to provide licensed bus services in the State and the average age of the licensed bus fleet in 2014 is 6.61 years. The figure in 2013 was 1,062 vehicles with an average age of a vehicle being 6.83 years. This indicates that there has been investment in commercial fleet in terms of fleet size and vehicle age profile between 2013 and 2014.

Table 5A shows that the ten operators with the youngest bus fleet have an average bus fleet age of 2.67 years. The ten operators with the oldest bus fleet have an average bus fleet age of 16.59 years.

Table 5A
Average age in years of the licensed bus fleet

	2013	2013	2014	2014
Description	Years	No. of buses	Years	No. of buses
Average age for 10 operators with youngest bus fleet	3.18	114	2.67	126
Average age for 10 operators with oldest bus fleet	20.00	33	16.59	34
Average fleet age for all licensed operators	6.83	1,062	6.61	1,222

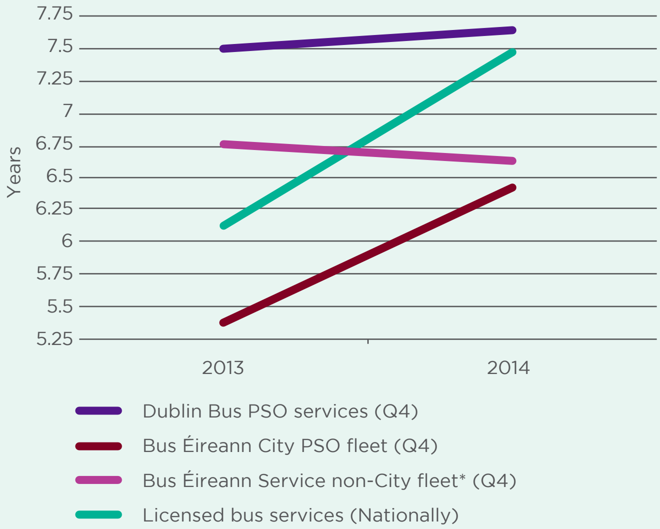
Note: Youngest/oldest here means buses with the lowest/highest cumulative age

Table 5B
Average age of the licensed and PSO bus fleets

	2013	2014
Licensed bus services (Nationally)	6.8 years	6.6 years
Dublin Bus PSO services (Q4)	7.5 years	7.6 years
Bus Éireann City PSO fleet	5.4 years	6.4 years
Bus Éireann non-city fleet*	6.1 years	7.4 years

Note: Bus Éireann's non-city fleet includes Stage Carriage and Dublin Commuter PSO services.*

Figure 5.1
Average Fleet Age 2013 to 2014



6

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, in 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 passenger information.

It should be noted that although many AVL systems may be of benefit to an individual operator, only specific AVL systems are compatible to the State's real time passenger information (RTPI) facility that is available through on-street displays and through the website, apps or SMS service. Therefore having buses with AVL on board is not a sufficient guide as to whether these services can participate in the RTPI facility.

As mentioned in section 4, there are 1,222 buses used to provide licensed bus services in the State. Of these 1,222 buses, 812 have AVL systems on board, which means that 66% of the total licensed national bus fleet has AVL systems on board. This represents an overall increase of 6% on the total percentage of vehicles with AVL from 2013.

Table 6A and 6B show that the five largest licensed operators (out of the total of 127 active operators), have 553 buses or 68% of all buses with AVL systems on board. This percentage then increases to 82% for the largest 10 operators. 86 of the 127 operators do not have buses with AVL systems on board. These figures indicate that there is a concentration of buses with AVL systems on board among a small group of operators.

Table 6A
Number of buses with AVL systems on board

Largest* 5 operators with AVL on buses	553 buses
Largest* 10 operators with AVL on buses	671 buses
All licensed operators with AVL on buses	815 buses

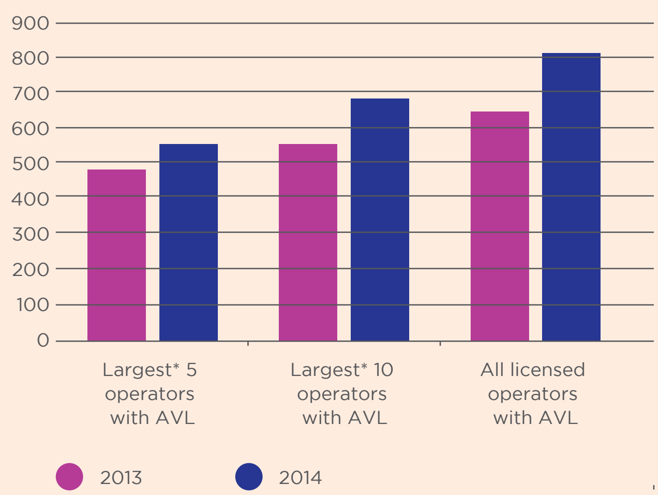
Note: Largest here is measured by those operators with the biggest AVL fleet size.

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

Largest* 5 operators with AVL on buses	68%
Largest* 10 operators with AVL on buses	82%
All licensed operators with AVL on buses	100%

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

Figure 6.1
Number of licensed operating fleet buses with AVL systems on Board, 2013 v. 2014



7

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 only inter-operable public transport smartcard in the GDA. It was extended to the Greater Cork Area and Galway city in 2014.

The Leap card is also available on a number of different routes that begin outside the GDA and then travel through or finish inside the GDA. Examples of these include a variety of Bus Éireann services in the eastern part of the country and Wexford Bus on the Wexford to Dublin City and Airport route.

The Leap card is available for both publicly subsidised and licensed services and in 2014 there were eight bus operators using the Leap card: Bus Éireann, Dublin Bus, Matthews Coaches, Swords Express, Wexford Bus, Collins Coaches, M&A Coaches and City Direct Galway (Bus Éireann and Dublin Bus run both commercial and publicly subsidised services).

There is also a smartcard available on Ulsterbus services called Smartlink and as they operate a number of cross-border services, their buses are included in the total figure for operating fleet with smartcard reading equipment on board.

As can be seen in Table 7, 25% of the total licensed national bus fleet has smartcard reading equipment on board. This refers to buses operating to, from or through the State. This compares with a percentage of 75% for Bus Éireann's PSO fleet in 2014 and with 100% for Dublin Bus' PSO fleet in 2014.

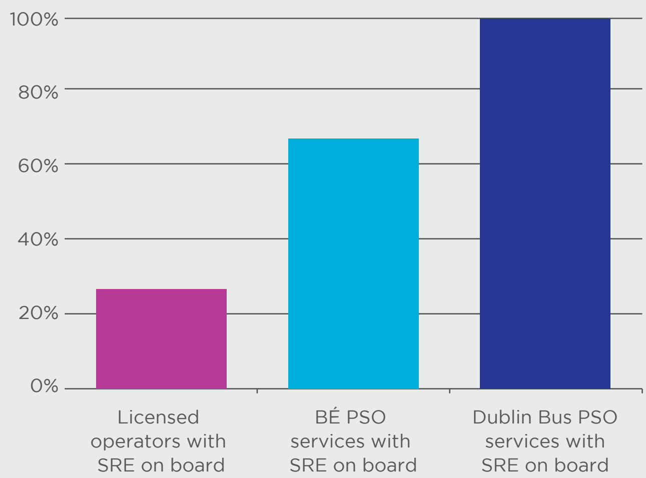
In respect to the Leap card and excluding Bus Éireann there are currently 89 buses for licensed services that are operating in the State with Leap card readers on-board. As the Leap card programme continues to be rolled out in the regional cities and beyond, this number will increase.

Table 7
Percentage of buses with smartcard reading equipment (SRE) on board

	2013	2014
Licensed operators with SRE on board excl. Bus Éireann	27%	25%
Bus Éireann PSO services with SRE on board	67%	75%
Dublin Bus PSO services with SRE on board	100%	100%
Licensed and PSO bus services nationally	62%	62%

Note: PSO services nationally here refer to Bus Éireann and Dublin Bus only

Figure 7.1
Percentage of Licensed and PSO operators with Smartcard reading equipment on board 2014



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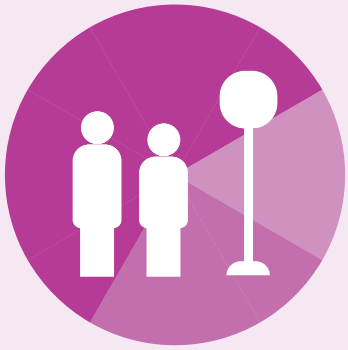


Wheelchair accessibility of the licensed services fleet

In subsections A, B, and C below, the wheelchair accessibility of the licensed fleet is examined. It is important to highlight that subsections A and B indicate whether a vehicle is either low-floor wheelchair accessible or is wheelchair accessible through the use of a lift. There is a small number of vehicles within the licensed bus services fleet that are accessible to wheelchairs by being both low-floor and having the use of a lift, although this is less common.

A. Operating fleet that are low floor buses suitable for wheelchair access

Low-floor wheelchair accessible buses are buses where access from the bus stop to part or all of the passenger area is direct from the bus stop apron. There are no steps involved and a wheelchair lift is not used.

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

As mentioned in section 4, there are 1,222 buses used to provide licensed bus services in the State. Of these 1,222 buses, 148 are low-floor wheelchair accessible buses, which mean that 12% of the total licensed national bus fleet is low-floor wheelchair accessible. This is compared to the 2013 figure of 137 vehicles which constituted 13% of the total licensed national bus fleet in that year.

Tables 8A and 8B show that the five largest* licensed operators have 102 buses or 69% of all buses that are low-floor wheelchair accessible buses. This percentage then increases to 82% for the largest 10 operators. These figures indicate that there is a concentration of buses that are low-floor wheelchair accessible among a small group of operators.

Table 8A
Number of buses that are low-floor wheelchair accessible (LFWA)

Largest* 5 operators with such buses	102
Largest* 10 operators with such buses	122
All licensed operators with such buses	148

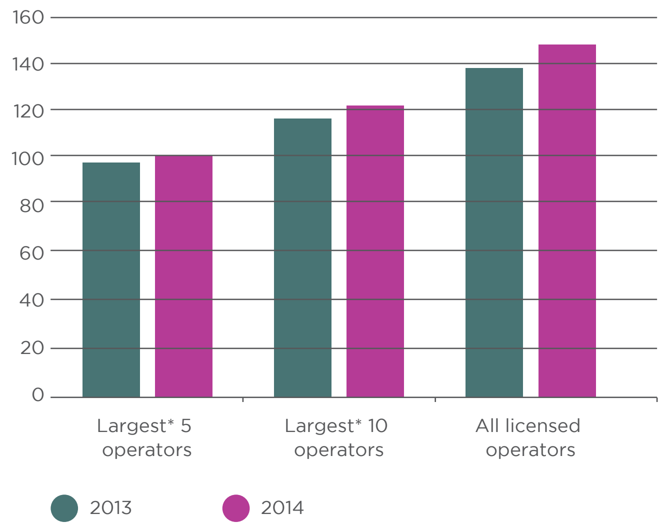
** Note: Largest here is measured by those operators with the biggest LFWA fleet size.*

Table 8B
Percentage of all LFWA buses controlled by larger operators

Largest* 5 operators with such buses	69%
Largest* 10 operators with such buses	82%
All licensed operators with such buses	100%

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

Figure 8.1
Number of Licensed operating fleet that are low-floor wheelchair accessible buses



B. Operating fleet that have lifts suitable for wheelchair access

Buses with wheelchair lifts raise the individual and wheelchair above the steps of the bus and into the coach corridor area. This feature requires a deep space at the footpath which is not always available. The use of wheelchair lifts increases the dwell time at bus stops and may not be as attractive as the low-floor, roll-on, roll-off option.

Buses with wheelchair lifts are often only able to carry one passenger using a wheelchair at any given time because 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 because seating may need to be removed to provide for a designated wheelchair space.

As mentioned in section 3, there are 1,222 buses used to provide licensed bus services in the State. Of these 1,222 buses, 291 have lifts suitable for wheelchair access, which means that 24% of the total licensed national bus fleet has lifts suitable for wheelchair access.

Tables 8C and 8D show that the five largest* licensed operators have 268 buses or 90% of all buses with lifts suitable for wheelchair access. This percentage then increases to 94% for the largest 10 operators. These figures indicate that there is a concentration of buses with lifts suitable for wheelchair access among a small group of operators. There has been a reduction in the number of buses with wheelchair lifts between 2013 and 2014. However, this may reflect a better understanding by operators of the different wheelchair accessibility characteristics.

Table 8C
Number of buses that have lifts suitable for wheelchair access

Largest* 5 operators with such buses	268 buses
Largest* 10 operators with such buses	275 buses
All licensed operators with such buses	292 buses

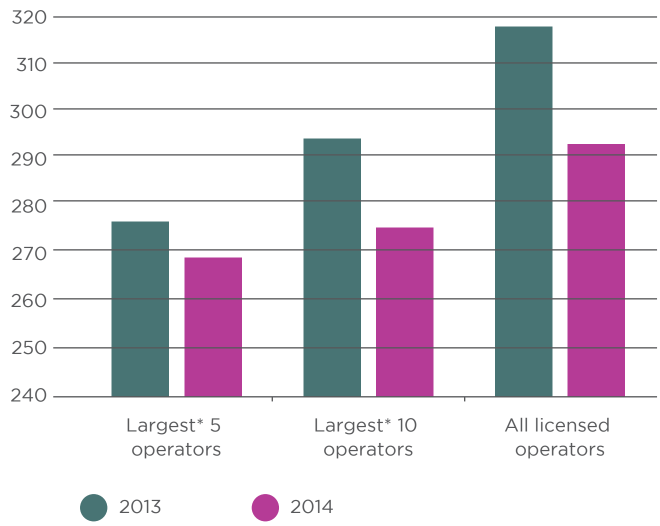
** Note: Largest here is measured by those operators with the biggest fleet size of buses that have lifts suitable for wheelchair access*

Table 8D
Percentages of buses that have lifts suitable for wheelchair access controlled by larger operators

Largest* 5 operators with such buses	90%
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 fleet size of buses that have lifts suitable for wheelchair access*

Figure 8.2



C. Scheduled kilometres operated with wheelchair accessible vehicles

This shows what percentage of an operator's total scheduled kilometres were operated with accessible buses, i.e. any vehicles that were either low floor wheelchair accessible or buses with lifts suitable for wheelchair access.

So for instance, if an operator had three buses and one was wheelchair accessible (being either low floor or having a wheelchair lift) then you would expect that 33% of the total scheduled kilometres would be operated with accessible buses. However, if the wheelchair accessible bus was regularly used for licensed services, whereas the other buses were used less often or used as spares, then you would expect the percentage to be much higher because most of their services would be provided with the wheelchair accessible bus.

As mentioned in section 4, the figure for annual scheduled vehicle kilometres used to provide licensed bus services is 82.02m for the State. Of these 82.02m scheduled kilometres, 35.81m are scheduled kilometres operated with wheelchair accessible vehicles, which means that 44% of all the licensed scheduled vehicle kilometres run are run with wheelchair accessible vehicles. This is an increase on the 2013 figure of 39%.

As these figures are derived from an estimation by operators, they are intended to be read as guide figures as opposed to being exact calculations. However, if one considers Table 8G, it shows that there is a reasonable level of consistency between the number of buses that are accessible and the overall percentage of accessible scheduled kilometres reported by operators.

Tables 8E and 8F show that the five largest licensed operators run 88% of total scheduled kilometres operated with wheelchair accessible vehicles. 'Largest' here is measured by those operators running the most scheduled kilometres with wheelchair accessible vehicles. The 10 largest licensed operators run 95% of total scheduled kilometres operated with wheelchair accessible vehicles.

The details in Tables 8E and 8F and Figure 8.3 indicate that there is a concentration of scheduled kilometres run with wheelchair accessible vehicles among a small group of operators.

Table 8E
Number of scheduled vehicle kilometres run with wheelchair accessible vehicles (millions)

Largest* 5 operators by accessible kms run	31.46m
Largest* 10 operators by accessible kms run	31.09m
All licensed operators by accessible kms run	35.8m

** Note: Largest here is measured by those operators running the most scheduled kilometres with wheelchair accessible vehicles*

Table 8F
Percentage of scheduled vehicle kilometres run with wheelchair accessible vehicles (millions)

Largest* 5 operators by accessible kms run	88%
Largest* 10 operators by accessible kms run	95%
All licensed operators by accessible kms run	100%

** Note: Largest here is measured by those operators running the most scheduled kilometres with wheelchair accessible vehicles.*

Figure 8.3
Scheduled vehicle kilometres run by wheelchair accessible vehicles

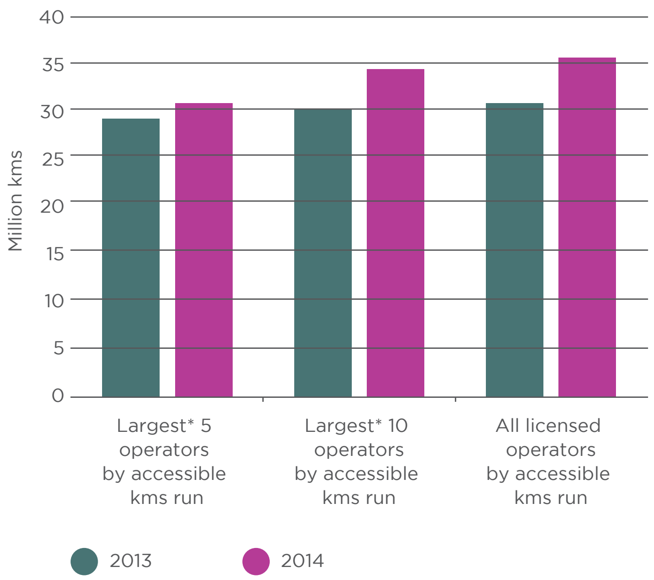
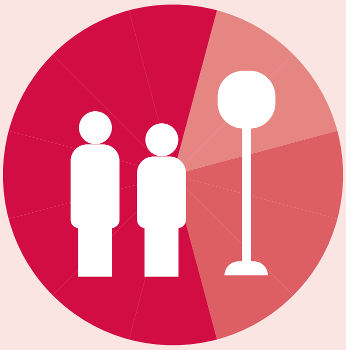


Table 8G
Licensed service buses by wheelchair accessibility

Number of buses that are low-floor wheelchair accessible	148	12%
Number of buses that have lifts suitable for wheelchair access	291	24%
Total wheelchair accessible vehicles	439	36%
Total numbers of buses providing licensed services	1,222	100%

Note: 44% of licensed scheduled vehicle kilometres run are run with wheelchair accessible vehicles.

9 Passenger revenue



Licensed commercial passenger revenue consists of all revenue from ticket sales (including cash, Leap card, TaxSaver, online & prepaid tickets), as well as commercial sector subsidies. The vast majority of the licensed commercial passenger revenue is from ticket sales alone. **It is important to note that revenues from the Department of Social Protection Free Travel payments and private hire services are not included in the revenue figures in this section of the bulletin.**

The Department of Social Protection Free Travel payments for licensed and PSO national bus services are outlined separately in section 10 'Free Travel Scheme revenue'.

A commercial sector subsidy 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 Tables 9A and 9B, licensed bus passenger revenue represents about 35.2 % of the total passenger fare revenue figure in the State. This is an increase on the figure of 33.76% for the year 2013. The PSO bus services national passenger revenue is made up of passenger fare 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 and does not include the Free Travel grant.

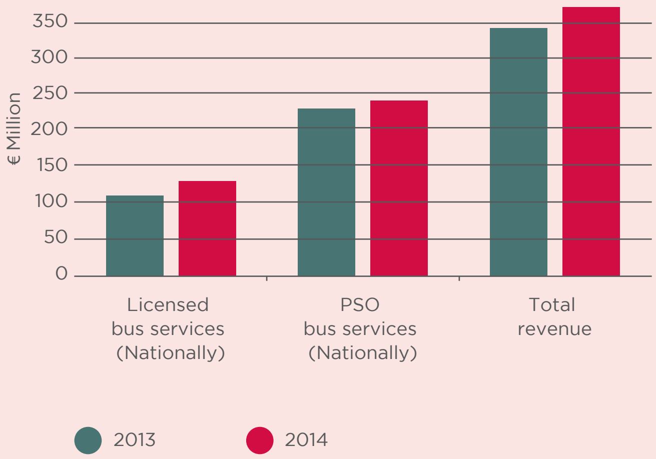
Table 9A
Annual passenger fare revenue (€ millions)

	2013	2014
Licensed bus services (Nationally)	€114.66	€ 130.03
PSO bus services (Nationally)	€ 225.00	€ 239.40
Total revenue	€ 339.66	€ 369.43

Table 9B
Percentage of annual passenger fare revenue

	2013	2014
Licensed bus services (nationally)	33.76%	35.20%
PSO bus services (nationally)	66.24%	64.80%
Total	100.00%	100%

Figure 9.1
Annual licensed and PSO passenger revenue (excluding DSP payments) millions



10

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 was available on the majority of State funded bus and rail transport including Dublin Bus, Bus Éireann, Iarnród Éireann and Luas services in 2014 - the exceptions are the PSO services operated by M&A Coaches and Whartons Travel where a concessionary fare has been applied. Free travel is also available on a number of licensed commercial services operated by private bus companies and Bus Éireann.

Table 10 shows annual Department of Social Protection (DSP) payments for the Free Travel Scheme for licensed services and PSO bus services.

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 categories.

Table 10
Annual DSP Free Travel Scheme passenger revenue

	2013	2014	% Change
Licensed bus services (Nationally)	€18.48m	€18.18m	-1.62%
Dublin Bus PSO services	€20.59m	€20.59m	0.00%
Bus Éireann PSO services (Nationally)	€12.07m	€11.98m	-0.75%
Rural Transport Programme (RTP)	€1.50m	€1.50m	0.00%

11

Free Travel Scheme passenger journeys

The Department of Social Protection's Free Travel Scheme is available on a number of licensed commercial services operated by private bus companies and Bus Éireann.

The figure for total licensed bus passenger journeys in the State for 2014 was 20.63 million (as outlined in Section 2). Of these 20.63 million journeys, 4.70 million were indicated by operators as Free Travel Scheme (FTS) journeys, which mean that **24% of all licensed bus passenger journeys in the State were taken by FTS passengers.**

It should be noted that these figures have been calculated by using an approximate percentage provided by operators and multiplying this by the total passenger journeys on the respective routes. The figures should therefore be taken as indicative only rather than precise calculations.

Table 11B shows that the five largest licensed operators with FTS passengers carried 73% of all FTS passengers. This percentage then increases to 84% for the largest 10 operators.

Table 11A
Number of licensed annual Free Travel Scheme passenger journeys (millions)

	2013	2014
Largest* 5 operators with FTS passengers	3.40	3.44
Largest* 10 operators with FTS passengers	3.90	3.96
All licensed operators with FTS passengers	4.75	4.70

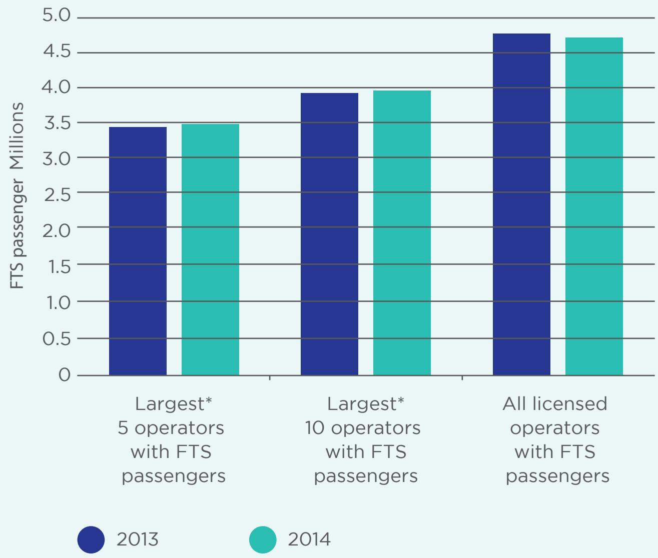
**Note: Largest here is measured by those operators carrying the largest number of FTS passengers*

Table 11B
Percentage of licensed annual Free Travel Scheme passenger journeys

% of licensed annual Free Travel Scheme passenger journeys	2013	2014
Largest* 5 operators	72%	73%
Largest* 10 operators	82%	84%
All licensed operators	100%	100%

**Note: Largest here is measured by those operators carrying the largest number of FTS passengers*

Figure 11.1
Number of licensed annual Free Travel Scheme passenger journeys



12

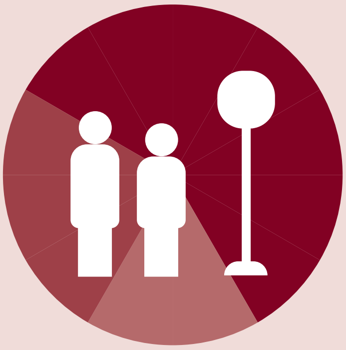
Availability of TaxSaver tickets by licensed service operators

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 as well as getting free travel for other trip types other than work trips. The scheme is generally known as the TaxSaver scheme but other names can be used by individual public transport operators.

The information in Table 12 shows that 20% of all operators offer at least one form of TaxSaver ticket which represents an increase from the figure of 17 % in 2013. These tickets are generally used by passengers on regular scheduled services and commuter type services. An annual ticket is the period of time that is usually offered by operators for tickets under the TaxSaver scheme.

Table 12
Number of operators offering TaxSaver tickets in 2014

Description	Number	% of all operators
All licensed operators offering multiple TaxSaver tickets e.g. Annual and Quarterly	15	12%
All licensed operators offering at least one TaxSaver ticket e.g. Annual	26	20%



13

Total public transport passenger numbers in Ireland

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

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

Figure 13.1 and Tables 13A and 13B provide national passenger journey information. Approximately 283 million public transport passenger journeys were made in Ireland in 2014. **This is an overall increase of approximately 11 million journeys from 2013 or growth of 2.7%.** Approximately 75% of these public transport trips were made using bus services.

If we exclude the Department of Education & Skills school transport schemes and focus on public transport that is available to all public passengers, then approximately 238.75 million public transport passenger journeys were made in Ireland in 2014 and roughly 71% of all public transport trips in Ireland were made using bus services. This is an increase of approximately 7.5 million journeys representing a 3.2% increase on 2013.

Figure 13.1
Public Transport Journeys between 2013 and 2014 (millions)

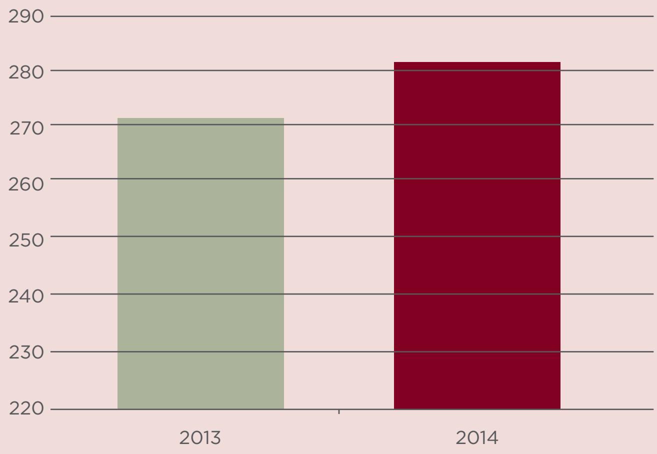


Table 13A
Total passenger journeys (millions) including Department of Education & Skills school transport schemes

Operator	2013	% split	2014	% split
Dublin Bus (PSO)	112.49[i]	41.4%	116.26[iii]	41.1%
Bus Éireann (PSO)	28.64[i]	10.6%	29.69[iii]	10.5%
Licensed commercial bus services through GDA	12.88	4.7%	13.92	4.9%
Licensed commercial bus services not through GDA	7.21	2.7%	6.71	2.4%
Rural Transport Programme	1.74[i]	0.6%	1.76[iii]	0.6%
Iarnród Éireann	36.74[ii]	13.5%	37.8[iv]	13.4%
Luas (RPA)	30.51[ii]	11.2%	32.61[iv]	11.5%
Department of Education & Skills school transport schemes	41.12[v]	15.2%	43.94[vi]	15.5%
Total	271.33	100%	282.69	100%

Note: See references for respective data sources.

Figure 13.2
Public transport passenger numbers in Ireland 2014 (including school transport schemes)

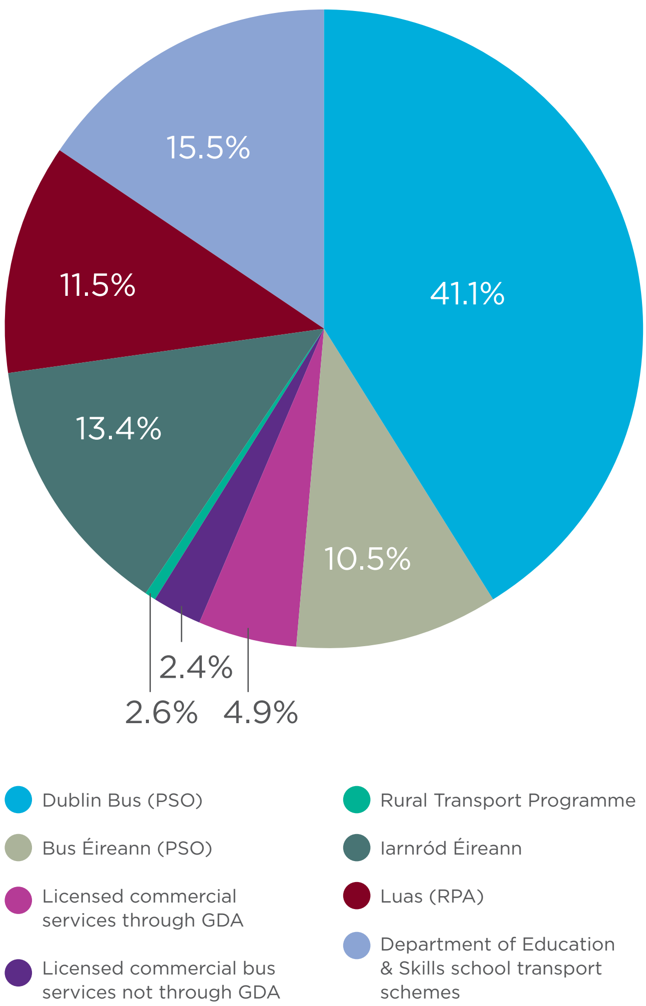


Table 13B
Total passenger journeys (millions) excluding Department of Education & Skills school transport schemes

	2013	2014	2014 Percentage Split
Dublin Bus (PSO)	112.49[i]	116.26[iii]	48.70%
Iarnród Éireann	36.74[ii]	37.8[iv]	15.83%
Luas (RPA)	30.51[ii]	32.61[iv]	13.66%
Bus Éireann (PSO)	28.64[i]	29.69[iii]	12.44%
Licensed commercial bus services (nationally)	20.09	20.63	8.64%
Rural Transport Programme	1.74[i]	1.76 [iii]	0.74%
Total Passenger numbers (millions)	230.21	238.75	100.00%

Note: See references for respective data sources.

Figure 13.3
Public transport passenger numbers in Ireland 2014 (excluding school transport schemes)

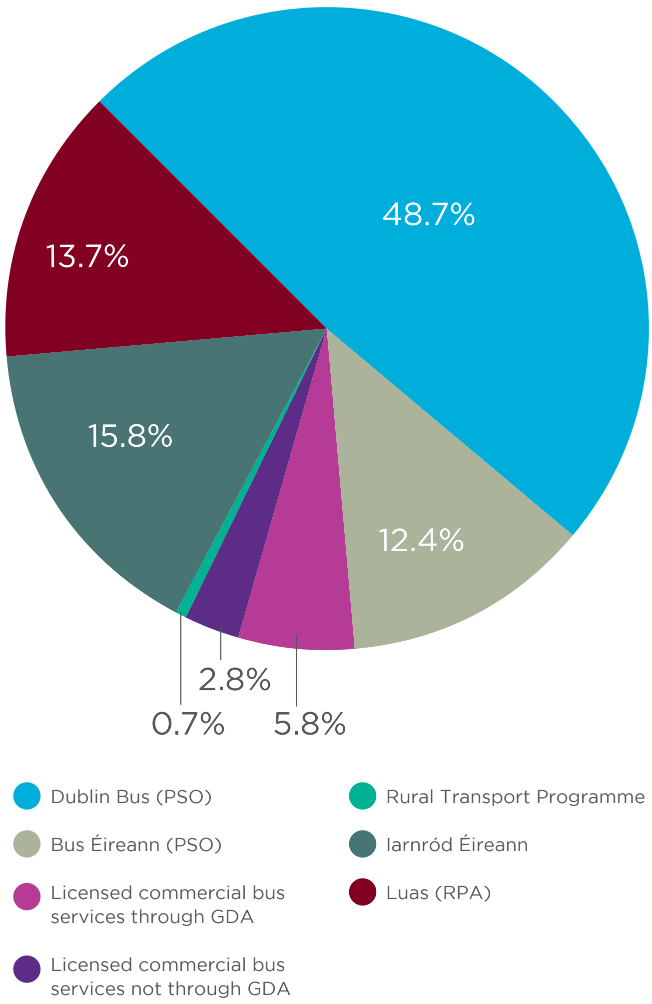
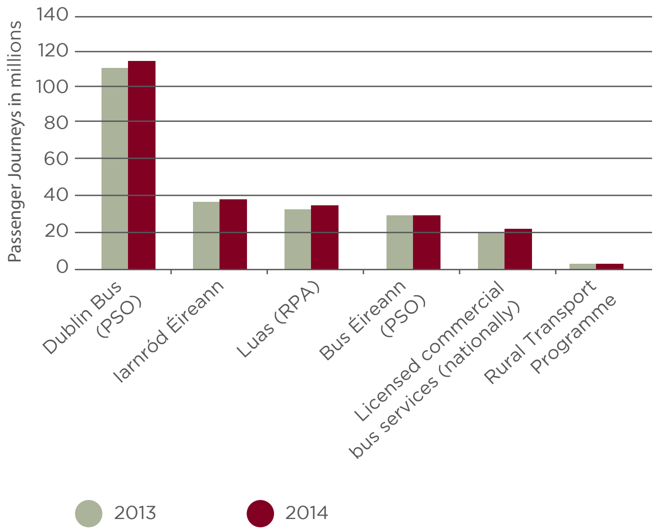


Figure 13.4
Public transport passenger numbers in Ireland 2013 v. 2014 (excluding school transport schemes)



Notes to Tables 13A and 13B:

i. NTA (2014), "Bus Statistics for Ireland – State Funded Services, Statistical Bulletin Number 03/2014, June 2014", National Transport Authority, Dublin; available at: https://www.nationaltransport.ie/wp-content/uploads/2013/10/Bus_Statistical_Bulletin_June_2014_Final_for_web.pdf

ii. NTA (2014), "Rail Statistics for Ireland, Statistical Bulletin Number 04/2014, June 2014", National Transport Authority, Dublin; available at: http://www.nationaltransport.ie/wpcontent/uploads/2013/10/Rail_Statistics_for_Ireland_June_2014.pdf

iii. NTA (2015), "Bus Statistics for Ireland – State Funded Services, Statistical Bulletin Number 01/2015, July 2015", National Transport Authority, Dublin; available at: http://www.nationaltransport.ie/wpcontent/uploads/2013/10/Bus_Statistical_Bulletin_July_2015_Final_for_web.pdf

iv. NTA (2015), "Rail Statistics for Ireland, Statistical Bulletin Number 02/2015, July 2015", National Transport Authority, Dublin; available at: http://www.nationaltransport.ie/wpcontent/uploads/2013/10/Rail_Statistics_for_Ireland_July 2015.pdf

v. Bus Éireann (2014), "Annual Report 2013", Bus Éireann, Dublin, available at: http://www.buseireann.ie/pdf/1439215270-Annual-Report-2013.pdf

vi. Bus Éireann (2015), "Annual Report 2014", Bus Éireann, Dublin, available at: http://www.buseireann.ie/pdf/1399641742-Annual-Report-2014.pdf

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