Údarás Náisiúnta Iompair
National Transport Authority

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August 2017

Commercial Bus Services in Ireland

(2016 statistics)

Bulletin Topics:

Overview of Commercial Bus Services
- Number of Operators and Licences
- Total Number of Passenger Journeys
- Scheduled Vehicle Kilometres
- Commercial Services Revenue and Ticketing
- Free Travel Scheme Revenue and Passenger Journeys
- Commercial Operator Fleet Size
- Commercial Operating Fleet Accessibility and Scheduled Kilometres Operated by Accessible Vehicles
- Automated Vehicle Location (AVL) Systems
- Commercial Fleet Age

Introduction

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.

Licensed public bus passenger 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 regular bus 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 licensed and authorised services in this bulletin are collectively refered to as regular commercial bus services.

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

The Authority did not include information on certain categories of licences such as Event or Venue 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 mainly ancillary services.

The data in this bulletin covers statistical information for all operators providing regular commercial services across the State for the years 2013 to 2016 and the Greater Dublin Area (the "GDA")[1] for the years 2012 to 2016 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 fourth 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 fifth year that they have supplied data. Following comparison of the data some figures, previously provided, have been revised by operators. The data expressed in this bulletin utilises the most up to date information and supercedes the previous years' bulletins.

Please note that the references to services as 'GDA Services' refers to any service traveling to, from or through any of the GDA counties of Dublin, Meath, Wicklow or Kildare. This includes services that travel wholly within the GDA as well as services that travel outside the GDA counties but which provide even part of the service within the GDA. GDA Services include licensed and authorised services.

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

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

The Authority has produced a separate bulletin on State funded services covering bus services provided by Dublin Bus, Bus Éireann, M & A Coaches Ltd, Andrew Wharton Coach Hire, Bernard Kavanagh & Sons Ltd and the Rural Transport Programme, as well State funded rail services provided by Iarnród Éireann and Light Rail services provided by Transdev. This 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. It should also be noted that some figures from previous years have been revised by the operators this year. This has been reflected in the figures stated in this bulletin.

In publishing data the Authority has been 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 100% return** was achieved from all operators with active licences for every year save for 2014 where a 99% return was achieved.

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

2016 Figures for Licensed Regular Bus Services

Total Passenger Journeys

2015		2016		
22.74 million	>	25.24 million	>	↑11%

Total Ticket Revenue

2015		2016		
143.19 million	>	155.62 million	>	↑9%

Total Scheduled Vehicle Kilometres

2015		2016		
86.28 million	>	92.08 million	>	↑7%

Table of Contents

Overview of Commercial Bus Services

The commercial public bus passenger sector for regular passenger services has seen significant growth over the four years for which data has been collected. The amount of passenger journeys made on these commercial services has increased by over a quarter since 2013 and in 2016 represented just under 10% of all public transport journeys in the State[2]. The vehicle kilometres provided by the sector is always a high ratio of all public transport vehicle kilometres provided due to the large variation in service types including high frequency urban services to the long distance intercity, commuter and rural services. The vehicle kilometres operated have increased 15% since 2013 and represented 45% of all vehicle kilometres travelled by public transport including rail and bus services in 2016.

In 2016 15% of the operators accounted for 90% of all the commercial passenger journeys made.

2 Excluding Schools services and Taxi journeys.

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

Year	All Passenger Journeys	Estimated Free Travel Passengers	Scheduled Kilometres	Free Travel Scheme Payments	All Revenue (Ticket & Free Travel)
2013	20.1	4.79	80.1	€20.06	€135.94
2016	25.24	5.29	92.08	€20.49	€176.11
Change 2013-2016	26%	10%	15%	2%	30%

1

Number of Operators and Licences

It is important to highlight that there is a large variability in the scale, frequency and type of services provided by operators. Operators provide diverse services including 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 and from employment and education; urban and suburban services; as well as rural services that generally link small towns, villages and rural areas. The frequency of services can vary from monthly services to several services per hour.

There were 122 operators in 2016 actively providing regular public bus passenger services on a national basis. The total number of operators is down slightly on previous years' figure of 126 operators. (See Table 1A). In a number of instances, where operators left the market in 2016, the licences were transferred to other existing operators.

There were 4 new entrants[3] to the regular commercial bus passenger services market in 2016.

The 122 operators held a total of 344[4] licences and authorisations to provide regular public bus passenger services within the State. There were 23[5] new regular service licences granted in 2016, of which 12 were for Non-GDA Services. Of the 23 new licences granted 17 commenced in 2016 and are accounted for within this bulletin. This is down from 35 new regular licences granted in 2015, 33 of which commenced within that year.

52% of the new licences granted in 2016 were for Non-GDA Services, this is down on 57% in 2015 and 78% in 2014. Between the years 2014 and 2016 approximately 2 out of every 3 licences granted were for Non-GDA Services. (See Tables 1B to 1D). In 2016 the number of operators outside of the GDA who had only one licence increased from 55% to 59% but reduced from 42% to 38% for those operators providing services which do stop within the GDA. To identify trends data from 2014 has been included in Tables 1C and 1D.

It should be noted that a 100% return was achieved from all operators with active licences.

Table 1A: Number of Operators with Active Regular Services

Year	Number of Operators with Active Licences
2013	124
2014	127
2015	126
2016	122

3 New entrants include instances where licences were transferred 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 private hire market.

4 Where a Licence and Authorisation are operated in conjunction with each other this has been counted as one service.

5 Three Additional Licences were granted and commenced in 2016 however these were for existing licences which had lapsed and were re-applied for.

Table 1B: Number of Active Regular Services

Licences/Year	2015	2016
Non-GDA services	214	217
GDA services	131	127
Total Licences & Authorisations	345	344

Table 1C: Number of New Licences

Year	Non GDA services	GDA services	Total Regular Licences Granted
2014	25	7	32
2015	20	15	35
2016	12	11	23

Table 1D: Percentage Split of New Licences between GDA and Non-GDA Services

Year	Non GDA services	GDA services
2014	78%	22%
2015	57%	43%
2016	52%	48%

Please note that not all licences granted in a specific year commenced services in that year. Temporary licences and licences granted to replace lapsed licences have not been counted as new regular licences.

As can be seen from Table 1E, more than half of all operators in 2016 held only one licence. This is an increase on 2015. Operators with only one licence providing Non-GDA Services, increased to approximately 3 out of every 5 operators and to approximately 3 out of every 4 with two or less licences. The percentage of operators with only one or two licences providing GDA Services decreased. The number of operators who held more than 4 licences in 2016 increased for those operators providing GDA Services but decreased for those operators providing Non-GDA Services.

Table 1E: Number of Operators by Licenced Services provided

Number of Licences1:	2015 Number of Licences Held	2016 Number of Licences Held	2015 Operating Wholly Outside the GDA	2016 Operating Wholly Outside the GDA	2015 Operating in or through the GDA	2016 Operating in or through the GDA
Operators with 1 Licence	50%	51%	55%	59%	42%	38%
Operators with up to 2 Licences	70%	70%	73%	75%	65%	62%
Operators with up to 3 Licences	79%	79%	85%	84%	71%	71%
Operators with up to 4 Licences	86%	83%	91%	88%	77%	76%
Operators with 1 to more than 4 Licences	100%	100%	100%	100%	100%	100%

Operators with only one licence accounted for 6% of all the passenger trips nationally in 2016. Figures 1.1 and 1.2 give the percentage breakdown in 2016 of operators by the number of licences held and by percentage of passenger trips by number of licences.

Figure 1.1: Percentage of Operators Providing Regular Services by Number of Licences held

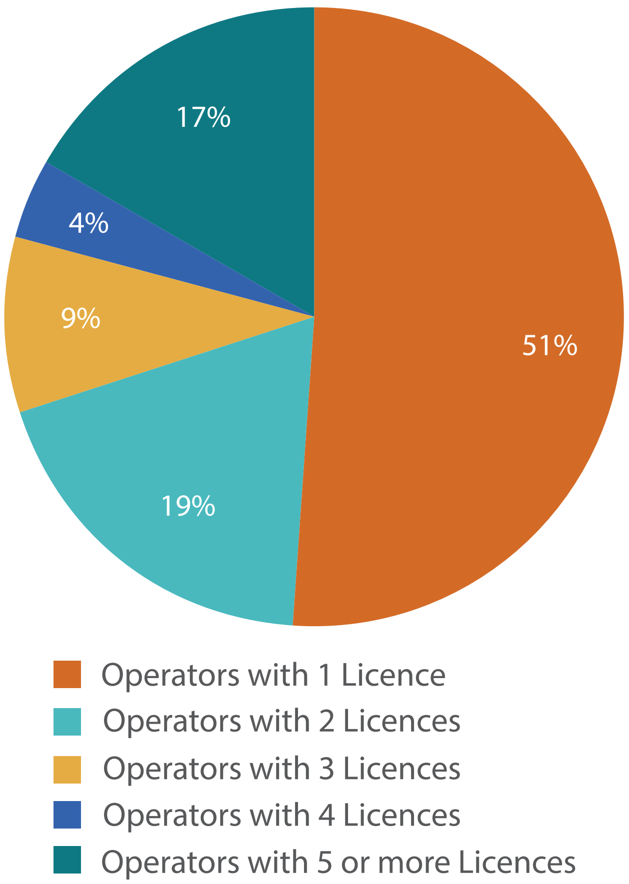
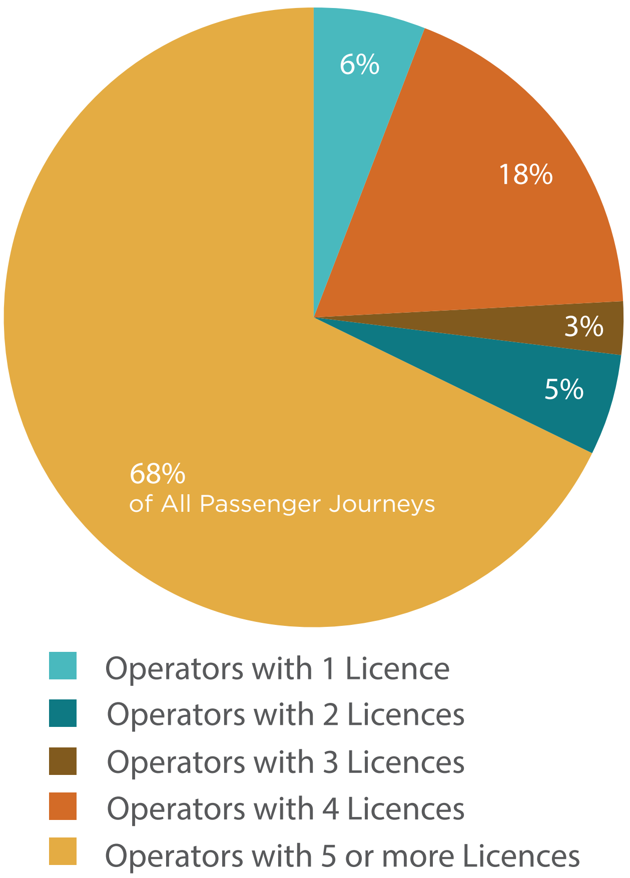
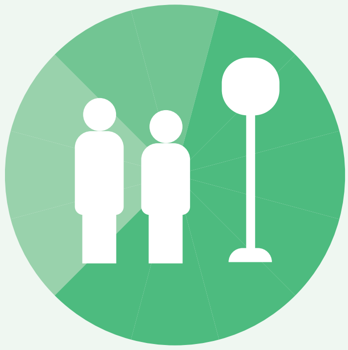


Figure 1.2: Percentage of All Passenger Journeys in 2016 by Number of Licences held



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 travel. Economic decline produces the opposite effect.

The regular commercial bus services sector has seen a significant growth in passenger journeys on a national basis. While this growth was not evenly distributed between Non-GDA and GDA Services between 2015 and 2016 both areas experienced strong increases in patronage.

Total passenger journeys on GDA Services have seen year-on-year increases since 2012 and were over 40% higher in 2016 than in 2012 with just over 12% increase in journeys between 2015 and 2016.

Non-GDA Services, despite a decline in patronage between 2013-2014, increased year on year from 2014, and were over 8% above figures in 2013. The share of the commercial passenger journeys for Non-GDA Services has fallen from 35% in 2013 to 30% in 2016.

Tables 2A and 2B, along with Figure 2.1, highlight the growth in respect of licensed passenger numbers between 2013 and 2016. Table 2C indicates how the passenger journeys grew by area based on 2013 journey figures.

Table 2D gives a breakdown of the market share of passenger journeys between Non-GDA Services and GDA Services.

For a broader view commercial bus services and PSO[6] services are compared in Tables 2E and Figures 2.1 and 2.2. From these figures it can be seen that while all modes have seen increased passenger journeys regular commercial bus services have seen over 5 million extra passenger journeys (26% increase) since 2013 and an increased market share of all passenger journeys going from just under 9% of all passenger journeys in 2013 to just under 10% in 2016.

However, it must also be borne in mind that journey lengths can vary in size depending on the type of service. For instance, a three kilometre urban journey in Dublin city is not the same as a 200km interurban journey between Dublin and Galway, although they are both counted as one passenger journey. It should also be noted that the figures are presented on an aggregated basis and individual operators and routes have seen increases and decreases in passenger journeys over the years.

6 PSO services are those services provided on a non-commercial basis under contact to the Authority.

Table 2A: Total Annual Passenger Journeys (millions)

Year	Non-GDA Services	GDA Services	All Commercial Bus Services	Change in Passenger Journey Numbers
2012	-	12.50	-	-
2013	7.06	13.02	20.09	-
2014	6.74	14.01	20.75	0.65
2015	7.06	15.67	22.74	1.99
2016	7.64	17.59	25.24	2.5

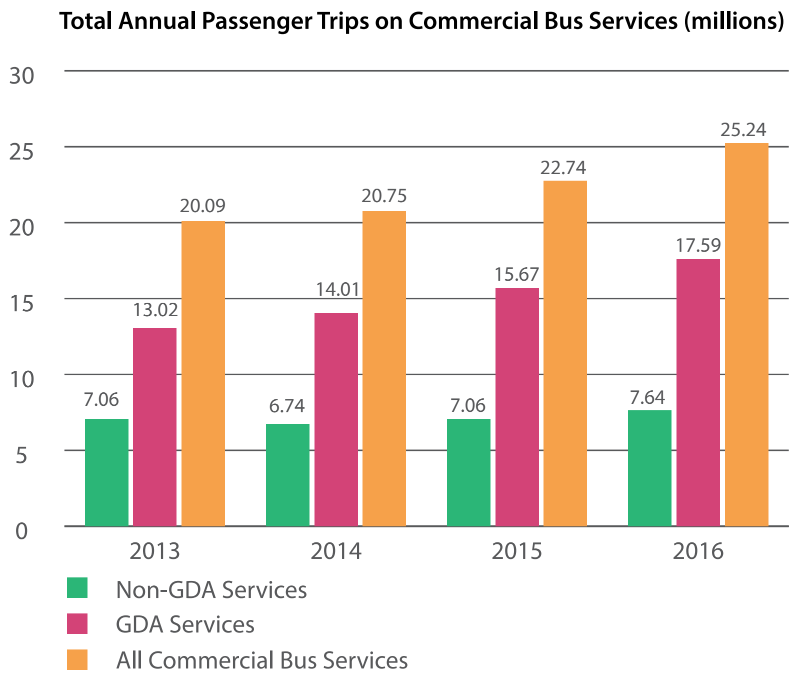


Figure 2.1: Comparison of Total Passenger Journeys by Year (millions)

Table 2B: Percentage Change per Year in Annual Passenger Journeys

Change from previous Year	Non-GDA Services	GDA Services	All Commercial Bus Services
2014	-4.6%	7.6%	3.3%
2015	4.8%	11.9%	9.6%
2016	8.2%	12.2%	11.0%

Table 2C: Percentage Change from 2013 in Annual Passenger Journeys

Change from 2013	Non-GDA Services	GDA Services	All Commercial Bus Services
2014	-4.6%	7.6%	3.3%
2015	0.0%	20.4%	13.2%
2016	8.2%	35.0%	25.6%

Table 2D: Percentage Breakdown in the State of Annual Passenger Journeys

Year	Non-GDA Services	GDA Services
2013	35%	65%
2014	32%	68%
2015	31%	69%
2016	30%	70%

Table 2E: Comparison of Commercial and PSO[7] Services Annual Passenger Journeys (millions)

Year	Rural Transport Programme PSO Services	Commercial Bus Services	Bus Éireann PSO Services	Luas PSO Services	Iarnród Éireann PSO Services	Dublin Bus PSO Services	Total	Change in Passenger Journey Numbers
2013	1.74	20.09	28.64	30.51	36.74	112.49	230.22	-
2014	1.76	20.75	29.69	32.61	37.80	116.26	238.87	8.65
2015	1.76	22.74	30.23	34.60	39.66	119.82	248.81	9.94
2016	1.79	25.24	32.12	34.03	42.81	125.35	261.33	12.52

Figure 2.2: Annual Passenger Journeys by Segment 2013-2016

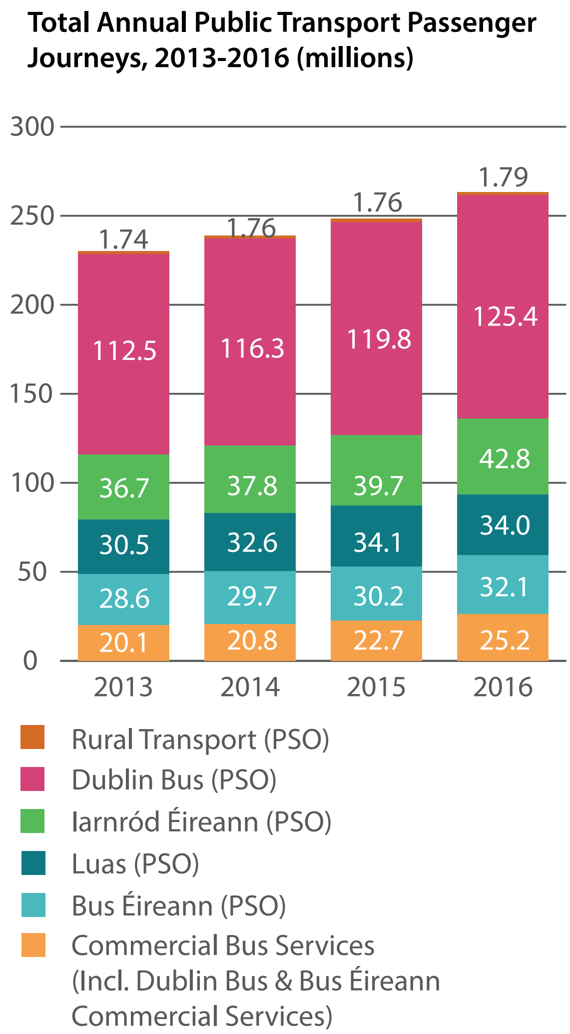
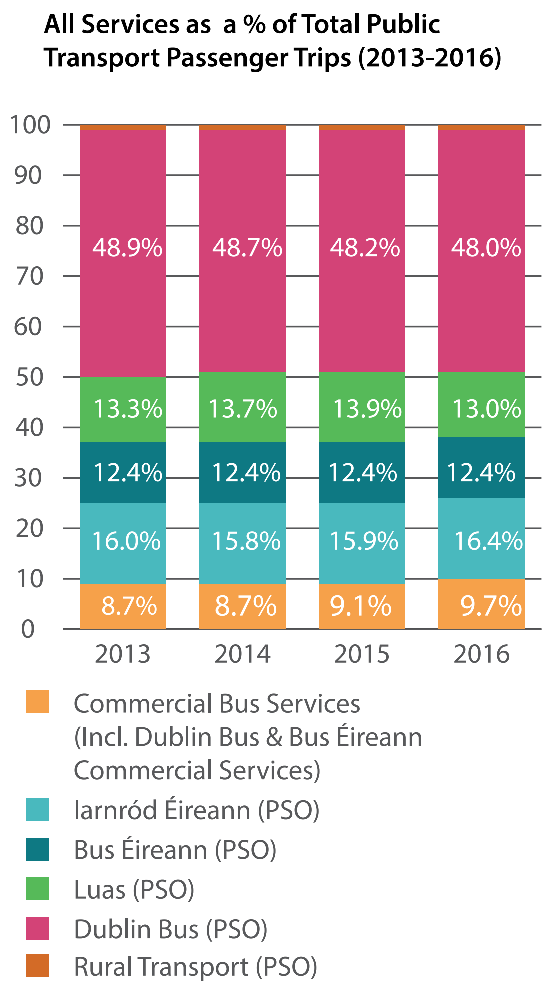


Figure 2.3: Percentage Share of Annual Passenger Journeys by Segment 2013-2016



7 PSO services are those services provided on a non-commercial basis under contact to the Authority.

3

Scheduled Vehicle Kilometres

‘Scheduled Vehicle Kilometres’ indicate the number of vehicle kilometres that a bus company planned to operate as per their cumulative timetables.

This measure has not increased significantly for Non-GDA services. For GDA Services the increase has been pronounced, with 30% more kilometres scheduled in 2016 than in 2012. Between 2013 and 2016 scheduled vehicle kilometres for GDA-Services have increased 19%, while passenger journeys have increased by 35%. Scheduled vehicle kilometres for Non-GDA Services have increased by 3%, while passenger journeys have increased by 8.2%.

Table 3A provides the figures and Tables 3B-3C show the changes as a percentage. Tables 3D-3E show vehicle kilometres by each PSO operator and commercial services.

Table 3A: Annual Scheduled Vehicle Kilometres (millions)

Year	Non GDA Services	GDA Services	All Commercial Services
2012	-	55.10	-
2013	19.82	60.29	80.10
2014	19.32	62.83	82.15
2015	20.75	65.53	86.28
2016	20.40	71.68	92.08

Table 3B: Percentage Breakdown in the State of Total Scheduled Vehicle Kilometres

Year	Non GDA Services	GDA Services
2013	25%	75%
2014	24%	76%
2015	24%	76%
2016	22%	78%

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

Year	Non GDA Services	GDA Services	All Commercial Bus Services On National Basis
2014	-2%	4%	3%
2015	7%	4%	5%
2016	-2%	9%	7%
2013-2016	3%	19%	15%

Table 3D Operated Vehicle Kilometres for PSO Services and Scheduled Vehicle Kilometres for Commercial Bus Services (millions)

Year	Luas	Iarnród Éireann	Bus Éireann PSO	Dublin Bus PSO	All Commercial Bus Services	Total
2013	3.54	15.97	33.34	50.30	80.10	183.25
2014	3.67	15.97	32.94	54.73	82.15	189.46
2015	3.66	15.97	33.76	55.34	86.28	195.01
2016	3.49	15.96	35.74	55.32	92.08	202.59

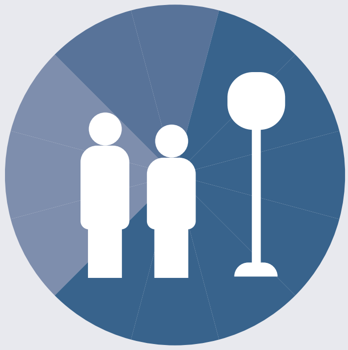
Table 3D shows scheduled vehicle kilometres for regular commercial bus services and compares this to the operated vehicle kilometres for PSO Bus and Rail services. 'Operated vehicle kilometres' refer to the actual amount of vehicle kilometres that a bus or rail company has operated for a given period, as opposed to the 'scheduled vehicle kilometres' which would indicate the number of vehicle kilometres that they intended to operate.

Table 3E: Percentage Change Vehicle Kilometres by Service Type

Year	Luas	Iarnród Éireann	Bus Éireann PSO	Dublin Bus PSO	All Commercial Bus Services
2013	2%	9%	18%	27%	44%
2014	2%	8%	17%	29%	43%
2015	2%	8%	17%	28%	44%
2016	2%	8%	18%	27%	45%

4

Commercial Bus Services Revenue and Ticketing



The vast majority of the overall licensed commercial bus services revenue is from ticket revenue (over 88% in 2016). Free Travel Scheme payments accounted for just over 11% of the total revenue in 2016. This is lower than in 2013, when Free Travel Scheme payments represented just over 14% of revenue. TaxSaver Ticketing was offered by 23% of Operators in 2016.

Regular commercial bus service revenue consists of all revenue from ticket sales (including cash, TaxSaver, Leap Card, online & prepaid tickets) and payments to operators participating in the Department of Social Protection's Free Travel Scheme. Regular commercial bus services include licensed bus services operating wholly within the State and bus services which cross the border into Northern Ireland and are subject to an authorisation.

TaxSaver Ticketing

The TaxSaver Commuter Ticket Scheme allows employees purchase annual/monthly public transport commuter tickets if they are travelling to or from work by public transport. The scheme involves employers providing employees with the facility to pay for the tickets over the month/year while saving on employer PRSI payments. The scheme is generally known as the TaxSaver Scheme but other names can be used by individual public transport operators.

Smart Card Ticketing

Smartcards are the technological successor to magnetic tickets. Smart cards contain a microchip that stores and transmits data enabling them to communicate with a smart card reading device without actually touching it. Period tickets such as Annual, Monthly and Weekly Tickets, as well as Pay-As-You-Go credit can be stored on the cards. The two main smart cards are the Leap Card and the Smartlink card. The Leap Card is the only inter-operable public transport smartcard within the State. The Smartlink Card is available from Ulsterbus, who operate a number of cross-border services.

Leap Card

The Leap Card was first introduced in late 2011 and is an integrated smart card which is available for both publicly subsidised and commercially licensed services. In 2014 the scheme was extended to the Greater Cork Area and in 2016 includes services in Galway City, Limerick City, Waterford City and Wexford. TaxSaver Tickets are now available on the Leap Card. In November 2016 the 2 millionth Leap Card was sold.

There were 12 operators in 201 6 with Leap Card on their regular 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, Dublin Bus and Bus Éireann. (Dublin Bus and Bus Éireann run both commercial and PSO services).

Free Travel Revenue

A number of commercial bus services are part of the Department of Social Protection's Free Travel Scheme. Operators that are part of the scheme receive payments for the fare forgone for carrying passengers entitled to Free Travel. Overall Free Travel Payments (listed as "FT Payments" in the tables) to commercial operators are set out below and include payments for Free Travel within the state for both Irish and Northern Irish passengers, as well as payments for cross border Free Travel. The Total Annual FT Payments in the Tables include payments for Bus Éireann's Expressway Services.

Table 4A shows the total ticket revenue and free travel scheme payments for the regular commercial bus services sector between 2013 and 2016. This includes figures for the licensed Bus Éireann Expressway and Dublin Bus Airlink services. The free travel 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 and Table 4C shows the change between revenue, passenger journeys, and scheduled vehicle kilometres between 2015 and 2016.

In 2016 of all operators providing regular commercial bus services, 23% offered one or more types of TaxSaver Ticket.

Table 4D shows the number and percentage of operators offering TaxSaver Ticketing.

Table 4A: Annual Passenger Revenue (millions)

Year	Total Annual Ticket Revenue	Total Annual FT Payments	Total Revenue	FT Payments as a Percent of All Revenue
2013	€115.889	€20.055	€135.944	14.8%
2014	€129.546	€20.101	€149.646	13.4%
2015	€143.187	€20.425	€163.612	12.5%
2016	€155.623	€20.487	€176.110	11.6%

Table 4B: Percentage Change in Revenue by Year

Year	Change in Annual Ticket Revenue	Change in Annual FT Payments	Change in Total Revenue
2014	12%	0%	10%
2015	11%	2%	9%
2016	9%	0%	8%

Table 4C: Percentage Change in Ticket Revenue, Vehicle Kilometres and Passenger Journeys (millions)

Year	Ticket Revenue (Excl. FT Payments)	Vehicle Kilometres	Passenger Journeys
2016	9%	7%	11%

Table 4D: Number of Operators offering TaxSaver Ticketing

Year	Operators Offering 1 or More TaxSaver Tickets	Percent of All Operators Offering TaxSaver Tickets
2013	17	14%
2014	27	21%
2015	25	20%
2016	28	23%

5

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 Invalidity Pension.

Free travel was available on State funded bus and rail transport including Dublin Bus, Bus Éireann, Iarnród Éireann and Luas services. Free travel is also available on a number of licensed commercial services operated by private bus companies and Bus Éireann. Since 1995 Northern Ireland Senior Citizens aged 65+ have been eligible for limited cross border free travel from any point in Northern Ireland to any destination in the Republic of Ireland.

The 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 when they arrive in the Republic of Ireland.

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 number of Free Travel Passenger Journeys has risen between 2013 and 2016 by 10% on a national basis, (See Table 5A). However, due to the overall growth levels in passenger journeys in the same period (25.6%) the percentage of all passenger journeys which were Free Travel Passenger Journeys has decreased from 24% of all commercial bus passenger journeys in 2013 to 21% in 2016.

These changes are not evenly distributed across the State. In fact on Non-GDA Services, while overall passenger journeys have increased 8.2% between 2013 and 2016 the estimated number of Free Travel Passenger Journeys has risen by an estimated 27% going from 36% of all journeys in 2013 to 43% in 2016. The same is not true of GDA Services which have an estimated 9% decrease in Free Travel Passenger Journeys over the same period with the percentage of such journeys reducing from 17% of all commercial bus passenger journeys in 2013 to 12% in 2016. These reported changes mean that Non-GDA Services increased the percent share of all Free Travel Passenger Journeys from 54% of all Free Travel Passenger Journeys on regular commercial bus services in 2013 to 62% in 2016.

Table 5A shows the estimated Free Travel Passenger Journey figures while Table 5B and 5C give the percentages.

Table 5A: Estimated Number of Free Travel Passenger Journeys (millions)

Year	Licensed Services Nationally	Licensed Non-GDA Services	Licensed GDA Services
2013	4.79	2.57	2.22
2014	4.73	2.84	1.89
2015	4.92	2.94	1.98
2016	5.29	3.26	2.03

Table 5B: Estimated Free Travel Passenger Journeys as a Percentage of All Passenger Journeys

Year	Licensed Services Nationally	Licensed Non-GDA Services	Licensed GDA Services
2013	24%	36%	17%
2014	23%	42%	13%
2015	22%	42%	13%
2016	21%	43%	12%

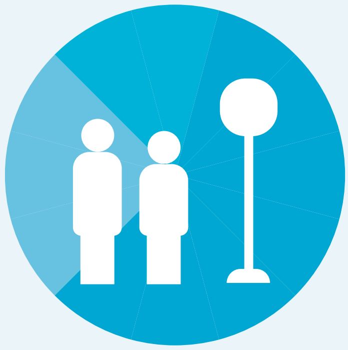
Table 5C: Percentage share of Estimated Free Travel Passenger Journeys

Year	Licensed Non-GDA Services	Licensed GDA Services
2013	54%	46%
2014	60%	40%
2015	60%	40%
2016	62%	38%

It should be noted that these figures have been calculated by multiplying the total number of passenger journeys with the estimated percentage of free travel passenger journeys provided by operators. The figures should therefore be taken as indicative only rather than precise calculations.

6

Commercial Operator Fleet Size



The number of vehicles that were used in 2016 to provide regular commercial bus services in the State was 1371. The Authority also asked licensed operators whether their vehicles were also used for other activities as well, to show not only how many vehicles operators used to provide their regular commercial bus services, but also how much these vehicles were used solely for running their regular commercial bus services services.

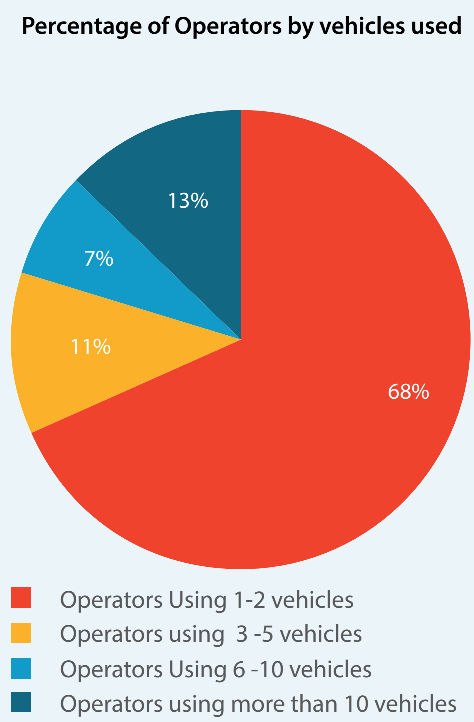
For example, if an operator had just one bus and this bus was used 70% of the time for regular licenced services and 30% of the time for private hire services, then the operator would count that as 0.7 of a vehicle when reporting their exact number of buses used.

Using this method of calculation there were 1125 buses used on a full time basis to provide regular passenger services. This is up 16% since 2013.

Table 6A: Number of Vehicles Used to Provide Regular Commercial Bus Services

Number of Vehicles/Year	2013	2014	2015	2016
Number of vehicles used on full time basis:	969	1,037	994	1,125
Number of vehicles Counted:	1,062	1,227	1,223	1,371

Figure 6.1: Percentage of Operators by Number of Vehicles Used to Provide Regular Commercial Bus Services



Vehicles 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 vehicles have a range of different designs and passenger seat capacities. The vehicles used are generally to suit the type of route being served.

7

Commercial Operating Fleet Accessibility and Schedule Kilometres Operated by Accessible Vehicles

The percentage of vehicles which are accessible is one measure of accessibility of the fleet, however another key indicator is the amount of scheduled vehicle kilometres these accessible vehicles are used to provide.

Since 2013 the reported number of wheelchair accessible vehicles used on regular commercial services has remained at approximately 2 vehicles for every 5 vehicles used. The number of vehicles which are reported as being low-floor suitable for wheelchair access has increased from 13% in 2013 to 16% in 2016, but as can be seen, remains low as a percentage of the overall fleet.

Wheelchair Accessibility

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 a small number of vehicles within this fleet that are accessible to wheelchairs by being both low-floor and having the use of a lift, although this is less common. Such vehicles have been counted as one accessible vehicle.

Commercial Operating fleet that are low floor vehicles suitable for wheelchair access

Low-floor wheelchair accessible vehicles are vehicles 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 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 can also require that appropriate bus stop infrastructure, for instance kerbs of a specific height, are in place.

Commercial Operating fleet that have lifts suitable for wheelchair access

Vehicles with wheelchair lifts raise the individual and their wheelchair above the steps of the bus and into the vehicle 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 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 because 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 have been set out in Tables 7C and 7D. For both GDA and Non-GDA Services there has been a trend of increased provision of the services by accessible vehicles. On a National basis the figures indicate an overall change from 39% of all scheduled vehicle kilometres in 2013 being provided by accessible vehicles to 61% in 2016.

The figures set out below are derived from estimations by operators. They are intended to be read as guide figures to indicate trends as opposed to being exact calculations.

For example, if an operator had three vehicles 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 vehicles. However, if the wheelchair accessible vehicle was regularly used for licensed services, whereas the other vehicles 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 vehicles.

The percentages are arrived at by multiplying the overall scheduled kilometres by the percentage of accessible vehicles used. The percentage of accessible vehicles used is calculated based on the total number of vehicles counted by an operator, rather than as a percentage of the number of vehicles used on a full time basis, as data has been provided on the basis of the total number of accessible vehicles available.

Table 7A: Number of Accessible Vehicles

Year	Vehicles that are Low-Floor Wheelchair Accessible	Vehicles with lifts suitable for Wheelchair access	Total Accessible Vehicles	Total Number of Vehicles used
2013	137	308	445	1062
2014	148	279	428	1227
2015	176	321	497	1223
2016	217	382	599	1371

Table 7B: Percentage of All Vehicles used which are Accessible Vehicles

Year	Vehicles that are Low-Floor Wheelchair Accessible	Vehicles with lifts suitable for Wheelchair access	Total Accessible Vehicles
2013	13%	29%	42%
2014	12%	23%	35%
2015	14%	26%	41%
2016	16%	28%	44%

Table 7C: Estimation of Scheduled Vehicle Kilometres provided by Accessible Vehicles based on Data provided by Operators (millions)

Year	All Non-GDA Services KM	Accessible Non-GDA Services KM	All GDA Services KM	Accessible GDA Services KM	Nationally All Scheduled KM	Accessible Scheduled KM Nationally
2013	19.8	7.1	60.3	24.3	80.1	31.4
2014	19.3	7.6	62.8	28.3	82.2	35.9
2015	20.7	11.1	65.5	36.4	86.3	47.4
2016	20.4	11.9	71.7	44.0	92.1	55.8

Table 7D: Percentage of All Scheduled Vehicle Kilometres provided by Accessible Vehicles based on Estimations

Year	Accessible Non-GDA Services Scheduled KM	Accessible GDA Services Scheduled KM	Accessible Scheduled KM Nationally
2013	36%	40%	39%
2014	39%	45%	44%
2015	53%	55%	55%
2016	58%	61%	61%

8

Commercial Operating Fleet with Automatic Vehicle Location (AVL) Systems

Automatic Vehicle Location (AVL) is the term used for automatically determining the geographic location of a vehicle. Vehicles are generally tracked by placing a global positioning system (GPS) electronic device in or on the vehicle.

The number of vehicles with AVL is now at approximately 70% of all vehicles used to provide regular commercial bus services. (See Tables 8a and 8B).

There are a number of benefits to AVL, especially in a public transport context. It allows an operator to manage their fleet better, know where the vehicles are at any given time, and it facilitates the provision of real time passenger information (RTPI).

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 RTPI facility that is available through on-street displays, websites, apps, or SMS service. 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 8A: Number of Vehicles with AVL

Year	Number of Vehicles with AVL	Total Number of Vehicles used
2013	639	1062
2014	812	1227
2015	807	1223
2016	960	1371

Table 8B: Percentage of All Vehicles used which have AVL

Year	Vehicles with AVL	Number of vehicles used to provide Regular Services on a Full time basis
2013	60%	1062
2014	66%	1227
2015	66%	1223
2016	70%	1371

9

Commercial Fleet Age

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. Maintaining and attracting passengers, who can have a preference for travelling on newer buses with enhanced features and designs, must also be considered.

The average vehicle age has changed from 6.8 years to 7 years between 2013 and 2016. During the same period the total number of vehicles used to provide regular commercial bus services on a full time basis increased by 156 vehicles from 969 vehicles in 2013 to 1,125 vehicles in 2016. These figures demonstrate that there is investment in the commercial fleet, which maintains an average vehicle age. (See Table 9A).

Table 9A: Average Age of Vehicles used to provide services

Year	2013	2014	2015	2016
Average Vehicle Age (Years)	6.8	6.6	6.8	7.0

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