Statistical Bulletin: 04 / 2019

Údarás Náisiúnta Iompair
National Transport Authority

Commercial Bus Services

in Ireland

Bulletin Topics:

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

Introduction

Introduction to the Statistical Bulletin on Commercial Bus Services in Ireland in 2018
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 and the Public Transport Regulation Act, 2009 and is required[1] to *"collect, compile, analyse and prepare information, data or statistics"* regarding public transport services in Ireland.

Once a year, operators of licensed regular public bus passenger services submit data to the Authority for the previous year's operation of these services. Data for these services in the Greater Dublin Area (the "GDA")[2] was first compiled in 2013 and in 2014 data was compiled for the entire State. The data in this bulletin covers statistical information for all regular public bus passenger services across the State for the years 2013 to 2018 GDA for the years 2012 to 2018.

High level information on State funded services, which are subsidised transport services provided under contract to the Authority, has also been included for comparative purposes. These services are referred to as Public Service Obligation ("PSO") services. 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.

Readers should be aware that 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 Dublin Bus Airlink services. The figures for these services are included in this bulletin.

Licences Categories not included in the Bulletin
Certain commercial public bus passenger service licence categories are not included in this bulletin because of the more ad hoc nature of the services. The licence categories excluded 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 Temporary licences and 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, bus services to and from the GDA which stop outside of the GDA, and those bus services that provide for travel outside of the GDA but which provide part of the service within 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.

Inclusion and Exclusions of certain types of Public Transport in the Comparisons
Information on the State Funded Bus and Rail services has been included for comparative purposes. These services consist of the Public Service Obligation ("PSO") services provided by Iarnród Éireann (Irish Rail); LUAS; Dublin Bus; Bus Éireann; LocalLink and private operators under contract to the Authority. Full details can be found in the Authority's Statistical Bulletin No. 3 of 2018. Comparisons do not include information on Taxi or School Bus Services. Information on Taxi services can be found in the Authority's Statistical Bulletin No.2: All of the Authority's Bulletins can be viewed and download at https://www.nationaltransport.ie/publications/statistics/bulletins/

Seven operators did not supply returns for commercial bus services provided in 2018. All of these were for Non-GDA services and are included in the number of operators and licences. The combined figures for these licences accounted for less than 1% of previous years' overall totals for Non-GDA services. Due to the rounding used in this bulletin, the figures have no statistical impact; however the actual figures for all Non-GDA services would be higher than recorded and are therefore presented in millions.

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 GDA or Non-GDA services.

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 revenues 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 NTA. 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

[1] Section 73 (Information, data and statistics) of the Dublin Transport Authority Act 2008, as amended.
[2] 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.

Overview of Figures for Commercial Bus Services in 2018

Total Passenger Journeys (Nationally)

2017 25.78 Million Journeys | **2018** 27.51 Million Journeys | Up 6.7% from 2017

Total Scheduled Vehicle Kilometres (Nationally)

2017 92.45 Million KM | **2018** 93.11 Million KM | Up 0.7% from 2017

Total Revenue (Nationally)

2017 €177.78 Million Euro | **2018** €202.20 Million Euro | Up 14% from 2017

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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. Returns were made for 97% of the licences and authorisations held in 2018. 98% of operators with active licences in 2018 supplied a return. 100% of operators made a return in previous years.

Overview of Commercial Bus Services

There has been significant and sustained growth in the commercial bus services sector over the six years for which data has been collected. The sector has seen growth in passenger journeys, scheduled vehicle kilometres, and revenue year on year since 2013. This continued in 2018 with regular commercial public bus services being one of the fastest growing transport sectors reporting a 37% increase in passenger journeys since 2013.

It should be remembered that two events in 2017 had an effect on the figures for commercial services. First was the 21 day strike period, where no Bus Éireann services operated and second was Storm Ophelia, which had an impact on the provision and utilisation of public transport services nationwide.

In 2018, passenger journeys on commercial bus services represented 9% of all public transport journeys and 44% of the scheduled vehicle kilometres in the State including light and heavy rail services, as well as contracted bus services. Between 2017 and 2018 the growth in passenger journeys was more evenly distributed between the GDA services and Non-GDA services.

The high ratio of scheduled vehicle kilometres for commercial bus services 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, long distance intercity services, as well as college, commuter, and rural services. Scheduled vehicle kilometres have also increased each year since 2013, but at a significantly slower rate than the increases in passenger journeys. In 2018 the scheduled vehicle kilometres were 15% higher than the 2013 figure. Scheduled vehicle kilometres nationally increased by less than 1% between the years 2017 and 2018, in line with the previous change between 2016 and 2017.

This year operators were asked for the first time to report on the number of vehicles and accessible vehicles used on a per licence basis for services provided in 2018. This provides for more accuracy in calculating not just the number of accessible vehicles, but also the volume of the overall kilometres provided by such vehicles. For 2018 it was indicated that 60% of the scheduled vehicle kilometres were provided by accessible vehicles and that the average age of the vehicles was seven years old.

In 2018, 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's fleet sizes have grown.

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

Year	Total Passenger Journeys	Free Travel Journeys (Estimated)	Scheduled Vehicle KM	Total Revenue (Ticket and Free Travel Payments)
2013	20.1	4.8	80.1	€135.94
2018	27.5	5.0	93.1	€202.20
Change 2013-2018	37%	5%	16%	49%

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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; as well as 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 and 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 2018 there were a total of 126 operators providing 317 active licenses and authorisations. Six were new entrants[3] to the regular commercial bus services market. In 2017 there were five new entrants, four in 2016, and seven in 2015.

The total number of active licences and new licences granted has decreased since 2015. There were ten[4] new licences granted in 2018. Of these, six commenced in 2018. These are accounted for within this bulletin. Six of the new licences were for Non-GDA services. The majority of new licences granted each year since 2014 have been for Non-GDA services. The figures are set out in Table 1C and 1D. New licences granted and commenced represent approximately 2% of all licences in 2018, down from 4% of all licences operated in 2017.

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

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

[3] New entrants 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.

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

Table 1B: Number of Active Regular Licences/ Authorisations

Licences/Year	2015	2016	2017	2018
Non-GDA services	214	217	217	206
GDA services	131	127	118	111
Total Licences & Authorisations	345	344	335	317

Table 1C: Number of New Licences

Year	Non-GDA services	GDA services	Total New Regular Licences Granted	New Licences 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

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

Year	Non-GDA services	GDA services
2014	78%	22%
2015	57%	43%
2016	52%	48%
2017	67%	33%

Figure 1.1 and Tables 1E to 1G 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 2018 there was a slight increase in the types of operators providing services as there was a minor increase in smaller scale operators. Over half of all operators (53%) were single licence holders, and accounting for 7% of all passenger journeys. Between 2015 and 2017 single licence holders were approximately 50% of all operators, accounting for 6% of all passenger journeys. The number of operators holding up to three licences was also slightly up on 2017. For both Non-GDA services and GDA services the proportion of single licence holders increased again in 2018. Single licence holders account for a higher percentage of Non-GDA services, where approximately three out of every five operators held one licence. While a smaller proportion of GDA service operators hold one licence, this section of operators has grown faster than the Non-GDA service operators.

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

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

Table 1F: 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
Operators with 1 Licence	55%	59%	58%	60%
Operators with up to 2 Licences	73%	75%	77%	78%
Operators with up to 3 Licences	85%	84%	84%	86%
Operators with up to 4 Licences	91%	88%	90%	90%

Table 1G: 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
Operators with 1 Licence	42%	38%	50%	56%
Operators with up to 2 Licences	65%	62%	78%	75%
Operators with up to 3 Licences	71%	71%	84%	81%
Operators with up to 4 Licences	77%	76%	91%	91%

Figure 1.1: Percentage of Operators by Number of Licences Held

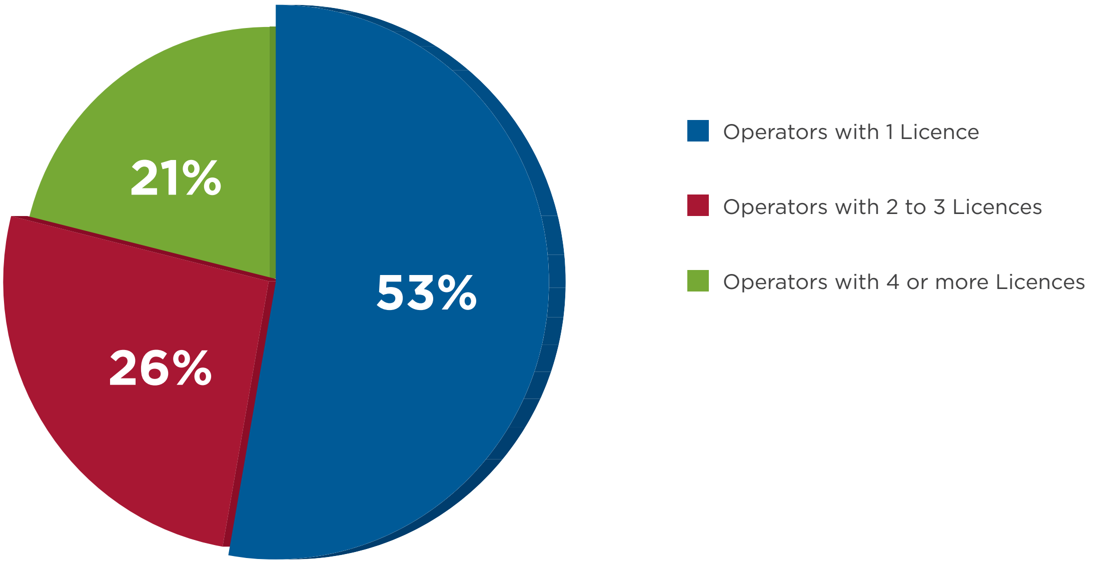
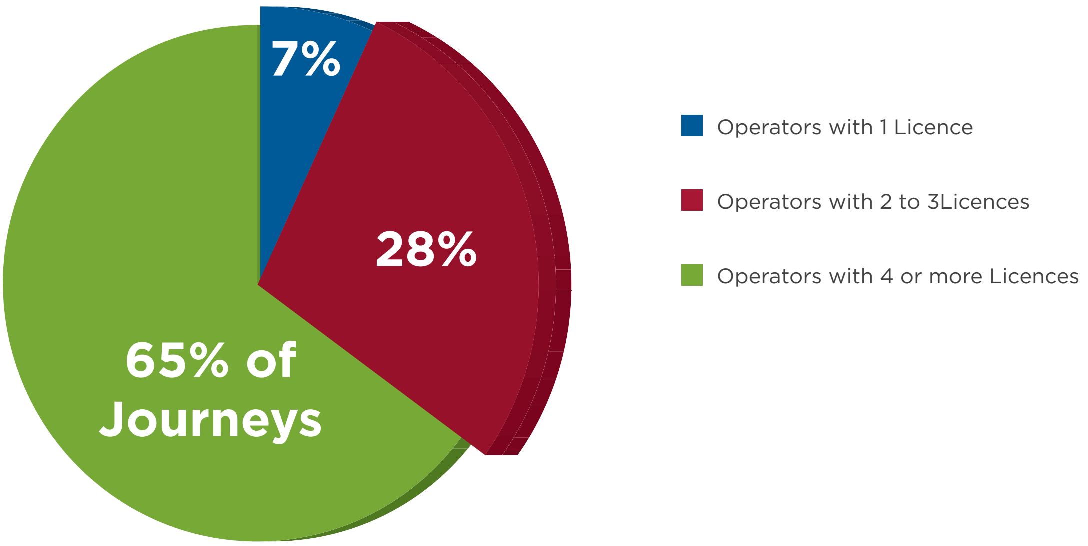


Figure 1.2: Percentage of Passenger Journeys based on Number of Licences Held



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 demand for travel. Economic decline produces the opposite effect.

Strong growth in passenger journeys continued on commercial bus services overall between 2017 and 2018 with an increase of 7% in passenger journeys. It should be remembered 2017 figures were impacted by Storm Ophelia and the Bus Éireann strike.

The growth in passenger journeys was evenly distributed between GDA and Non-GDA services in 2018 at around 7%, particularly when compared to the 2016/2017 period, where Non-GDA services experienced a decline of 3% and GDA services reported an increase.

Passenger journeys on GDA services have seen year on year increases since 2012 and are just under 60% higher than in 2012. GDA service passenger journeys in 2018 were over 50% higher than in 2013. Non-GDA service passenger journeys, which were not recorded in 2012, were just under 12% higher in 2018 than in 2013.

The total share of the passenger journeys for GDA services has increased from 65% of all passenger journeys in 2013 to 71% in 2018, unchanged on the 2017 split. Figure 2.1 and Table 2A, also highlight the growth in respect to passenger journeys between 2013 and 2018. Table 2A also indicates 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 2.2, 2.3, and 2.4 as well as in Table 2C. Combined total passenger journeys on the commercial and PSO services have been growing at an increasing rate since 2013, from an increase of 3.8% between 2013 and 2014 to an increase of 6.4% between 2017 and 2018. The combined figures show passenger journeys were 29% higher in 2018 than in 2013. See Table 2C.

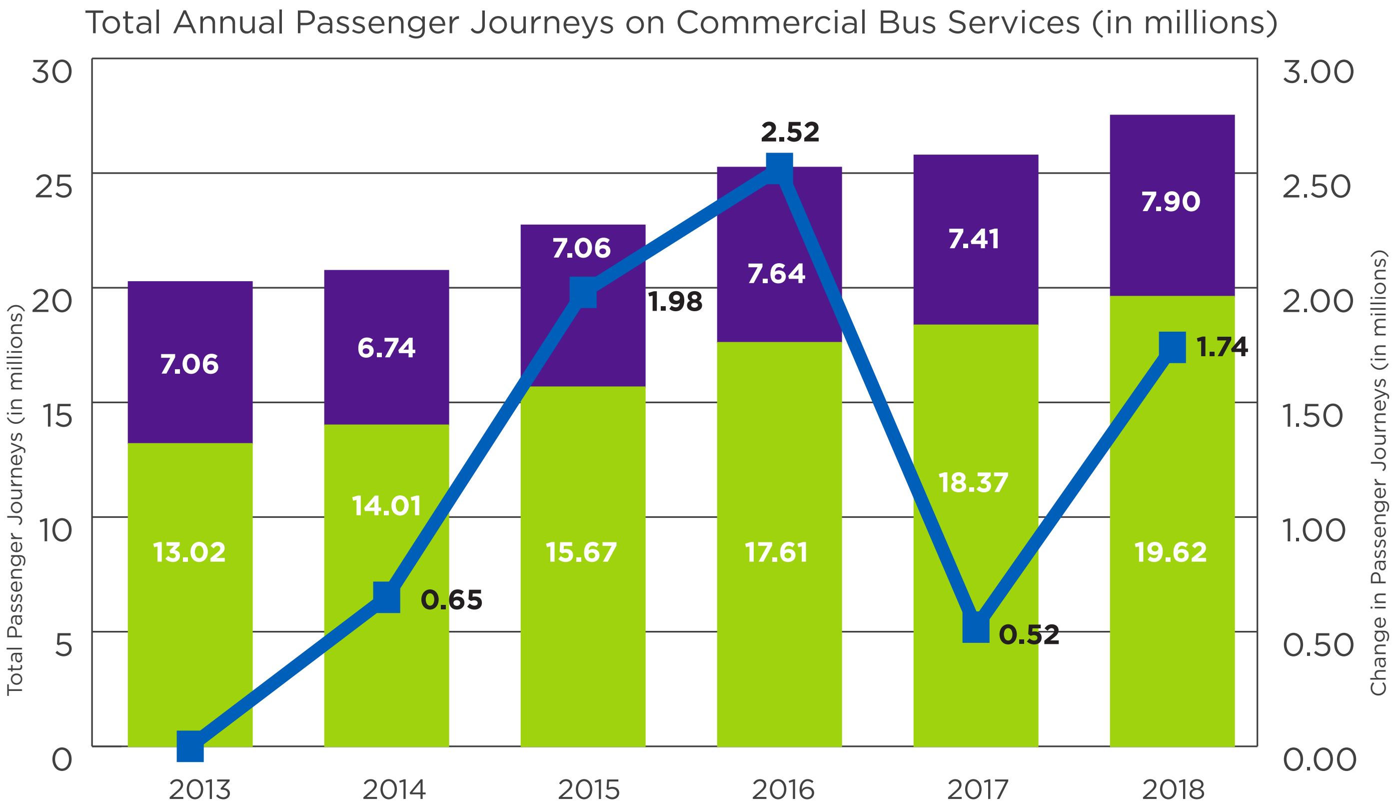
Commercial bus services and Luas services have seen the greatest increase in passenger journeys over the period at 37%. See Figure 2.3. Commercial bus services increased market share of all public transport passenger journeys from 8.7% in 2013 to 9.3% in 2018. This is unchanged on 2017 figures. See Figure 2.4.

When looking at the figures it should be borne in mind that journey lengths vary significantly, depending on the type of service. For instance, a three kilometre urban journey between two stops in Galway and a 260 kilometre interurban journey between Dublin Airport and Cork are both counted as one passenger journey. It should also be noted that the figures are presented on an aggregated basis, individual operators and routes have seen both increases and decreases in passenger journeys over the years.

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

Change from 2013 with 2013 as 100%	Non-GDA Services	GDA Services	All Commercial Bus Services
2013	100%	100%	100%
2014	95.5%	107.6%	103.2%
2015	100%	120.4%	113.1%
2016	108.2%	135.2%	125.6%
2017	104.9%	141.1%	128.2%
2018	111.8%	150.7%	136.9%

Figure 2.1: Comparison of Commercial Bus Services Total Passenger Journeys by Year 2013-2018 (in millions)

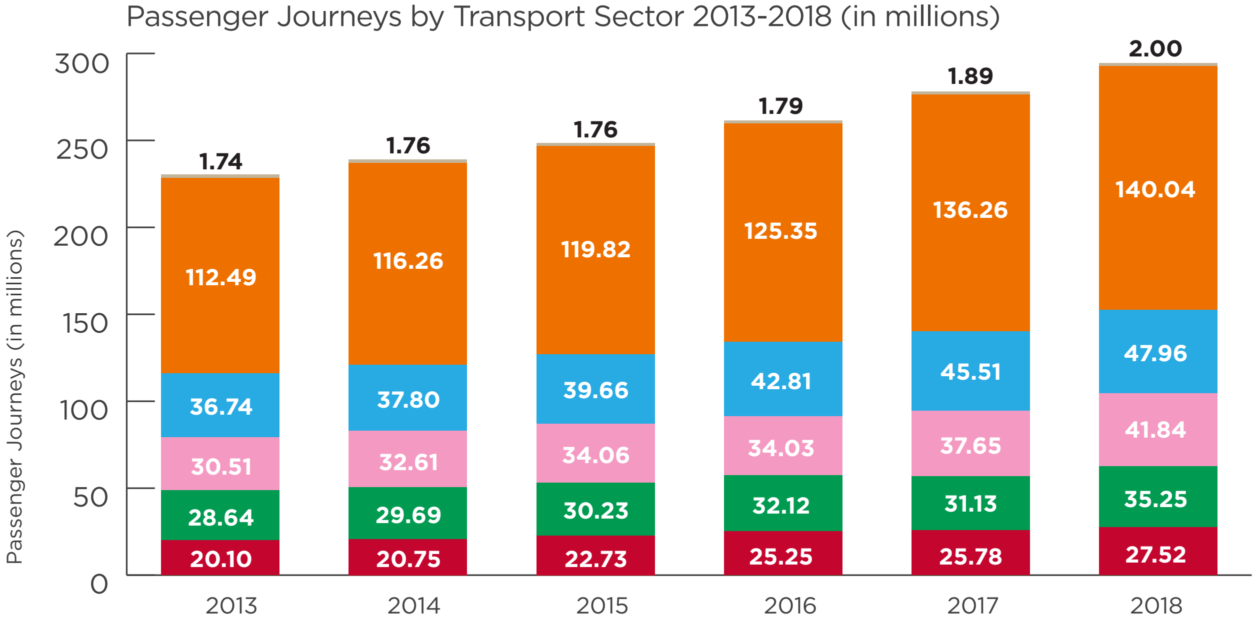


	2013	2014	2015	2016	2017	2018
Non-GDA Services	7.06	6.74	7.06	7.64	7.41	7.90
GDA Services	13.02	14.01	15.67	17.61	18.37	19.62
Total Change	0.00	0.85	1.98	2.52	0.52	1.74

Table 2B: Percentage Breakdown in the State of Total Annual Commercial Passenger Journeys

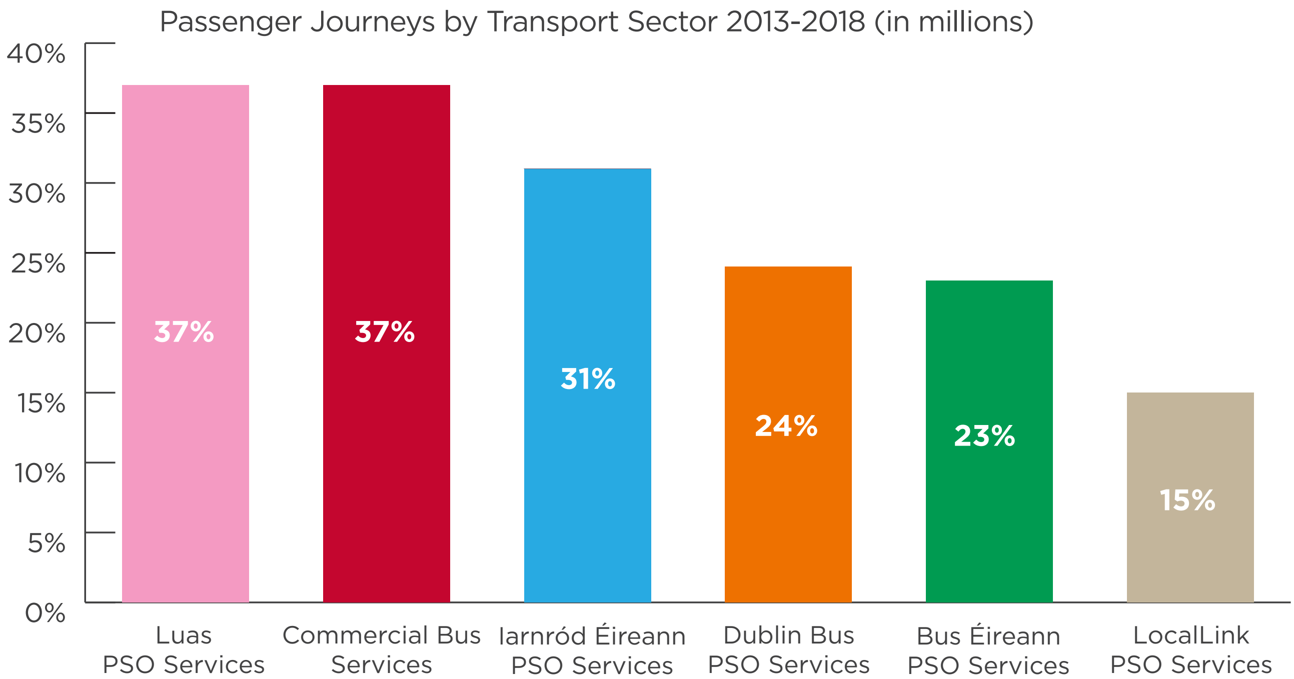
Year/ Licensed & Authorised Services	Non-GDA services	GDA services
2013	35%	65%
2014	32%	68%
2015	31%	69%
2016	30%	70%
2017	29%	71%
2018	29%	71%

Figure 2.2: Comparison of Total Passenger Journeys by Transport Sector 2013-2018 (in millions)[5]



	2013	2014	2015	2016	2017	2018
Other PSO Services*	0	0	0	0	0.064	1.57
LocalLink PSO Services	1.74	1.76	1.76	1.79	1.89	2.00
Dublin Bus PSO Services	112.49	116.26	119.82	125.35	136.26	140.04
Iarnród Éireann PSO Services	36.74	37.80	39.66	42.81	45.51	47.96
Luas PSO Services	30.51	32.61	34.06	34.03	37.65	41.84
Bus Éireann PSO Services	28.64	29.69	30.23	32.12	31.13	35.25
Commercial Bus Services	20.10	20.75	22.73	25.25	25.78	27.52

Figure 2.3: Comparison of Change in Passenger Journeys by Transport Sector 2013-2018

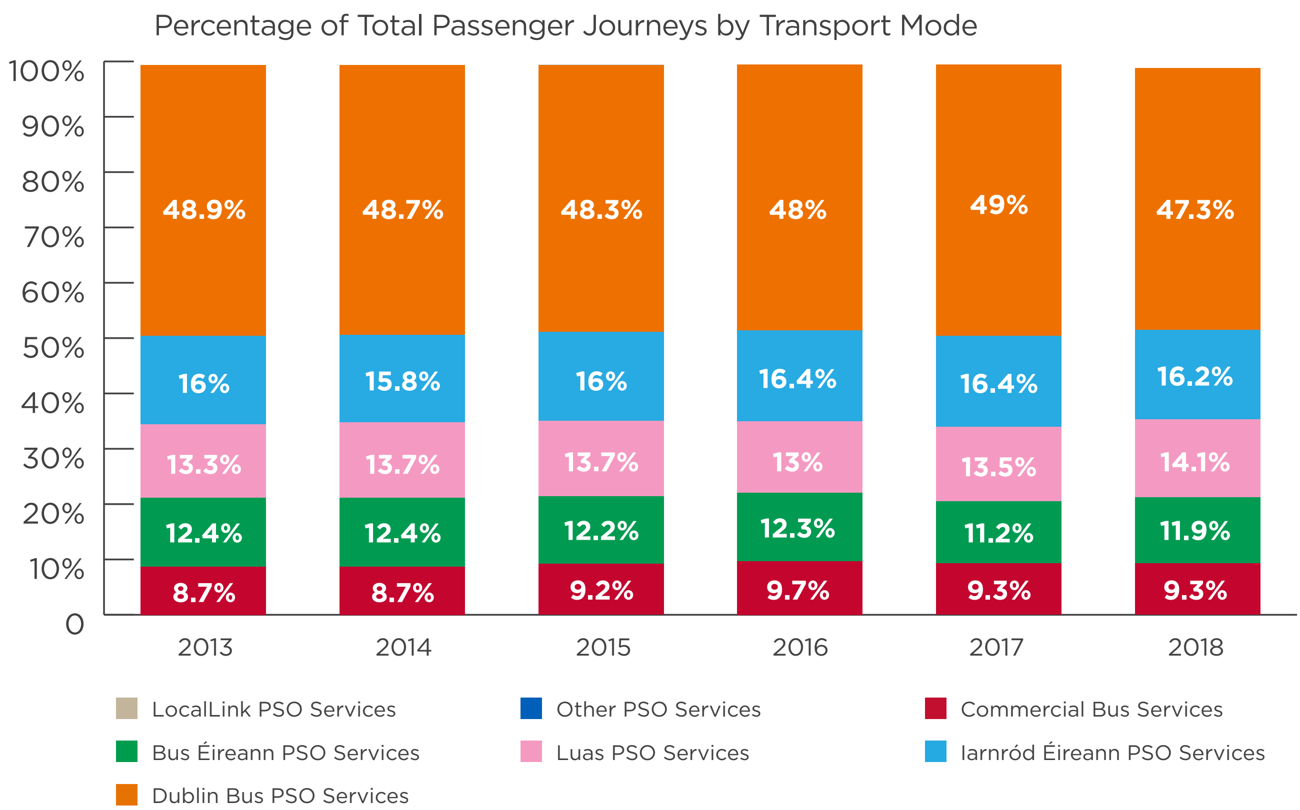


[5] Other PSO services include such contracted services as those provided by Go Ahead and J.J. Kavanagh

Table 2C: Comparison of Total Annual Passenger Journeys by Year 2013-2018 (in millions)

Year/ Operator	Total Passenger Journeys	Change in Passenger Journey Numbers between Years	Percentage Change Per Year	Increase in Passenger Journeys since 2013	Percentage Change Since 2013
2013	230.22	-	-	-	100%
2014	238.87	8.65	3.8%	8.6	104%
2015	248.26	9.39	3.9%	18.0	108%
2016	261.35	13.09	5.3%	31.1	114%
2017	278.29	16.93	6.5%	48.1	121%
2018	296.18	17.90	6.4%	66.0	129%

Figure 2.4: Comparison of the Percentage Share of Total Passenger Journeys by Transport Sector 2013 - 2018



Free Travel Passenger Journeys

The Department of Employment Affairs and 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, Iarnród Éireann and Luas services. 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 number of free travel passenger journeys has risen between 2013 and 2018 by 5% on a national basis. See Table 5A. However, due to the overall growth levels of 37% in commercial passenger journeys in the same period, total free travel passenger journeys has decreased from 24% as a proportion of overall passenger journeys in 2013 to 18% in 2018.

A significant divide between free travel passenger journeys on Non-GDA and GDA services has emerged and increased over the period from 2013 to 2018. While overall Non-GDA passenger journeys have increased 12% between 2013 and 2018, the estimated number of free travel passenger journeys on these services has risen by an estimated 21% going from 36% of all passenger journeys in 2013 to 39% of all passenger journeys in 2018.

The same is not true of GDA services, which have reported a 12.5% decrease in the estimated free travel passenger journeys over the same period, going from approximately 17% of all passenger journeys in 2013 to 10% in 2018, with the percentage reducing each year. 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 2018.

Tables 2D and 2E set out the estimated figures of free travel passenger journeys. Table 2F 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 precise calculations. The percentage of free travel passengers is estimated by the operators.

Table 2D: 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

Table 2E: 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%
Change in Total 2013-2018	20.6%	-12.5%	5.3%

Table 2F: 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%

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Scheduled Vehicle Kilometres

'Scheduled vehicle kilometres' indicate the total number of vehicle kilometres intended to be operated based on the licensed timetables. There was no significant change in the total scheduled vehicle kilometres on a national basis between 2017 and 2018, with less than a 1% increase reported. This is similar to the change between 2016 and 2017.

Overall scheduled vehicle kilometres have increased by 16% between 2013 and 2018. This is not evenly distributed with GDA services having increased by 21% in the same period while Non-GDA services increased by 2%. Figure 3.1 provides the annual scheduled vehicle kilometres provided by GDA and Non-GDA services from 2013 to 2018. Table 3A shows 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 services return figures on the operated vehicles kilometres for bus and rail services which 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.

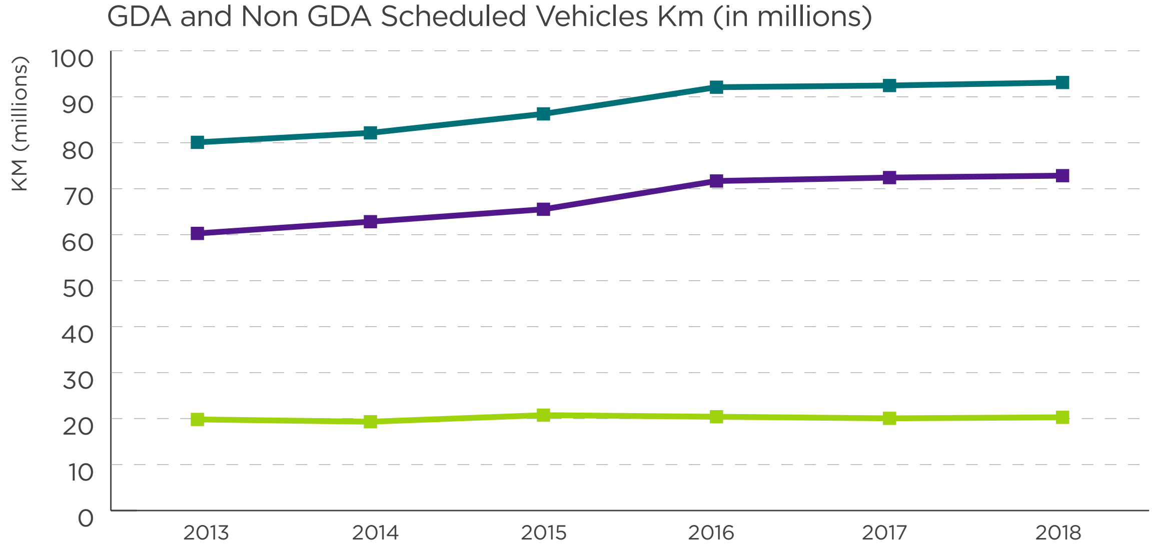
The scheduled vehicle kilometres provided by commercial bus services make up a significant proportion of all public transport kilometres, including those provided by rail services. This is due to the broad range of journey lengths and service frequency provided on commercial bus services, as well as the ability of an operator to amend a licence. The proportion of all vehicle kilometres which is provided by commercial bus services has increased slightly from 43.7% in 2013 to 44.1% in 2018. 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. They also show the changes per year between 2013 and 2018. Figure 3.4 shows the overall percentage of kilometres by Transport Operator.

Changes in scheduled vehicle kilometres between Non-GDA services and GDA services are more pronounced. It should be remembered that GDA services, for the purposes of these statistics, include licensed services which provide for transport within and outside the GDA as part of the overall route.

Non-GDA services scheduled vehicle kilometres remained static overall, with a 2% difference in the total amount of scheduled vehicle kilometres between 2013 and 2018. Passenger journey figures increased 12% in the same time. For GDA services the changes have been more evident, with 21% more scheduled vehicle kilometres provided in 2018 than in 2013. Passenger journeys increased 51% over the same period.

The figures indicate that more passenger journeys were taken on the existing Non-GDA services without much increase in the scheduled vehicle kilometres provided over the period. Between individual years there have been increases and decreases in both the scheduled vehicle kilometres provided and passenger journeys for the Non-GDA services. In contrast, there has been significant and continued growth in use of GDA services and increases in the scheduled vehicle kilometres provided. Increases in scheduled vehicle kilometres on GDA services have, each year, been significantly less than the increases in passenger journeys.

Figure 3.1: Comparison of Scheduled Vehicle Kilometres for GDA and Non GDA services by Year 2013-2018 (in millions)



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

Table 3A: Percentage Breakdown of Total Scheduled Vehicle Kilometres

Year	Non-GDA Services	GDA Services
2013	25%	75%
2014	24%	76%
2015	24%	76%
2016	22%	78%
2017	22%	78%
2018	22%	78%

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%

Figure 3.2: Comparison of Total Vehicle Kilometres by Transport Sector 2013-2018 (in millions)

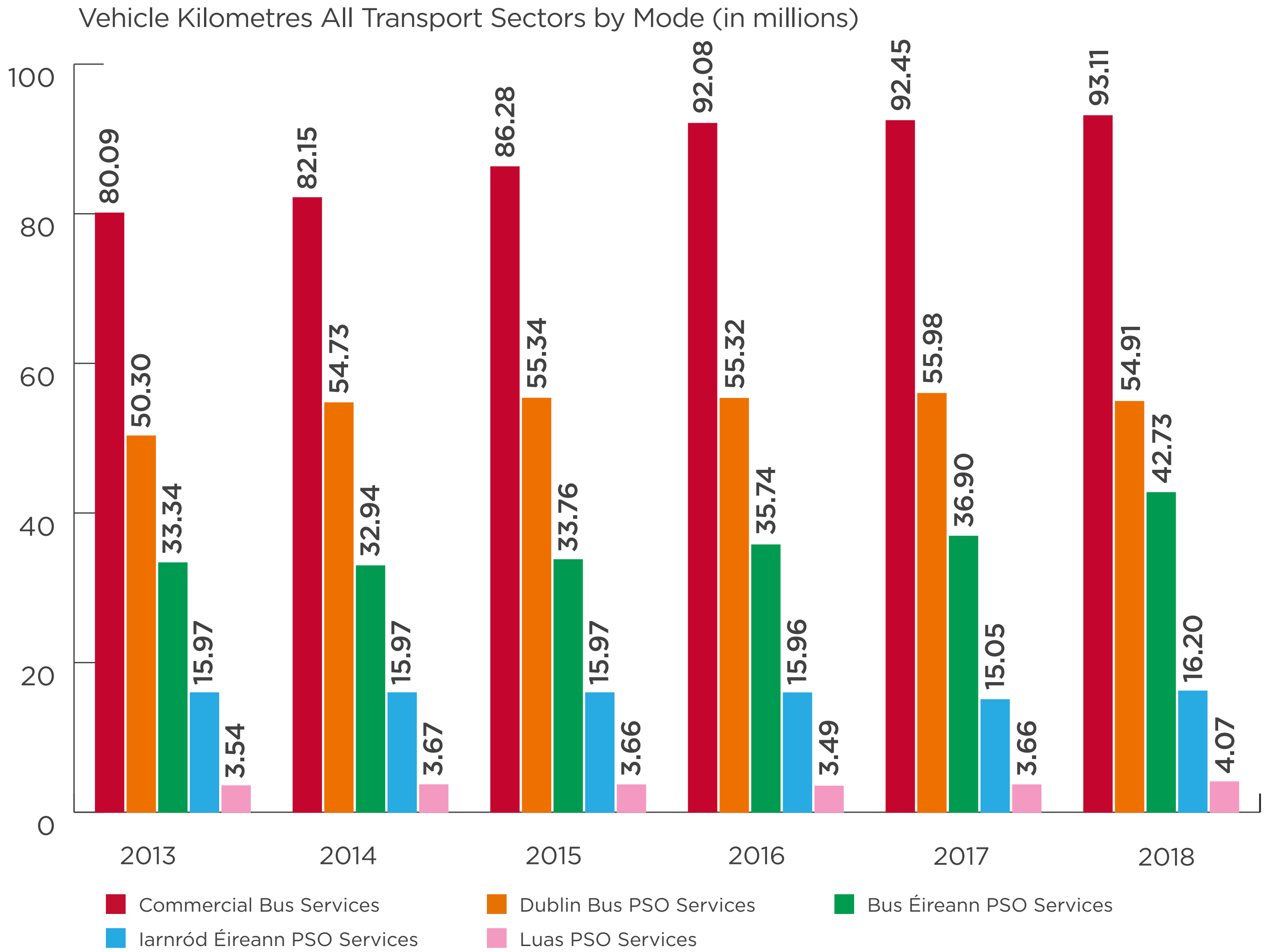


Table 3C: Comparison of the Overall Total Change in Vehicle Kilometres by Year 2013-2018

Year	Total KM All Services	Change in KM between Years	Percentage Change Per Year	Increase in KM Since 2013	Percentage Change Since 2013
2013	183.24	-	-	-	-
2014	189.46	6.22	3%	6.22	3%
2015	195.01	5.56	3%	11.78	6%
2016	202.59	7.57	4%	19.35	11%
2017	204.04	1.45	1%	20.80	11%
2018	211.02	6.99	3%	27.79	15%

Figure 3.3: Comparison of Change in Total Vehicle Kilometres by Transport Sector 2013-2018

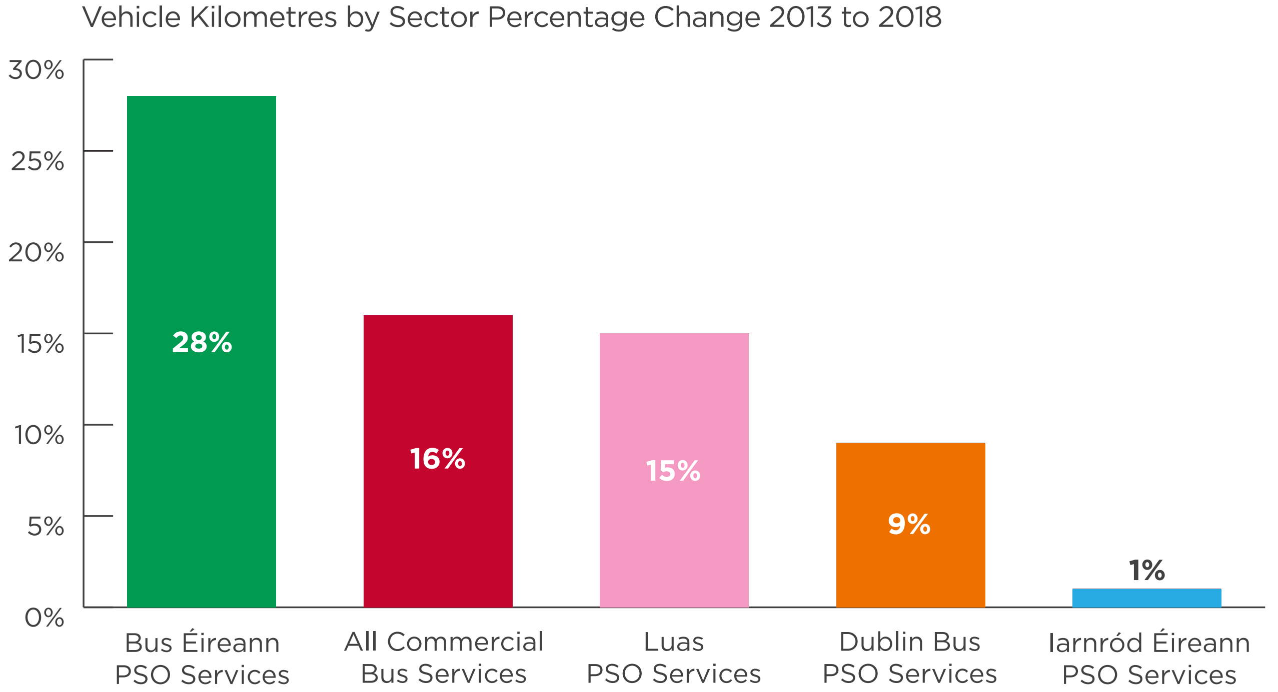
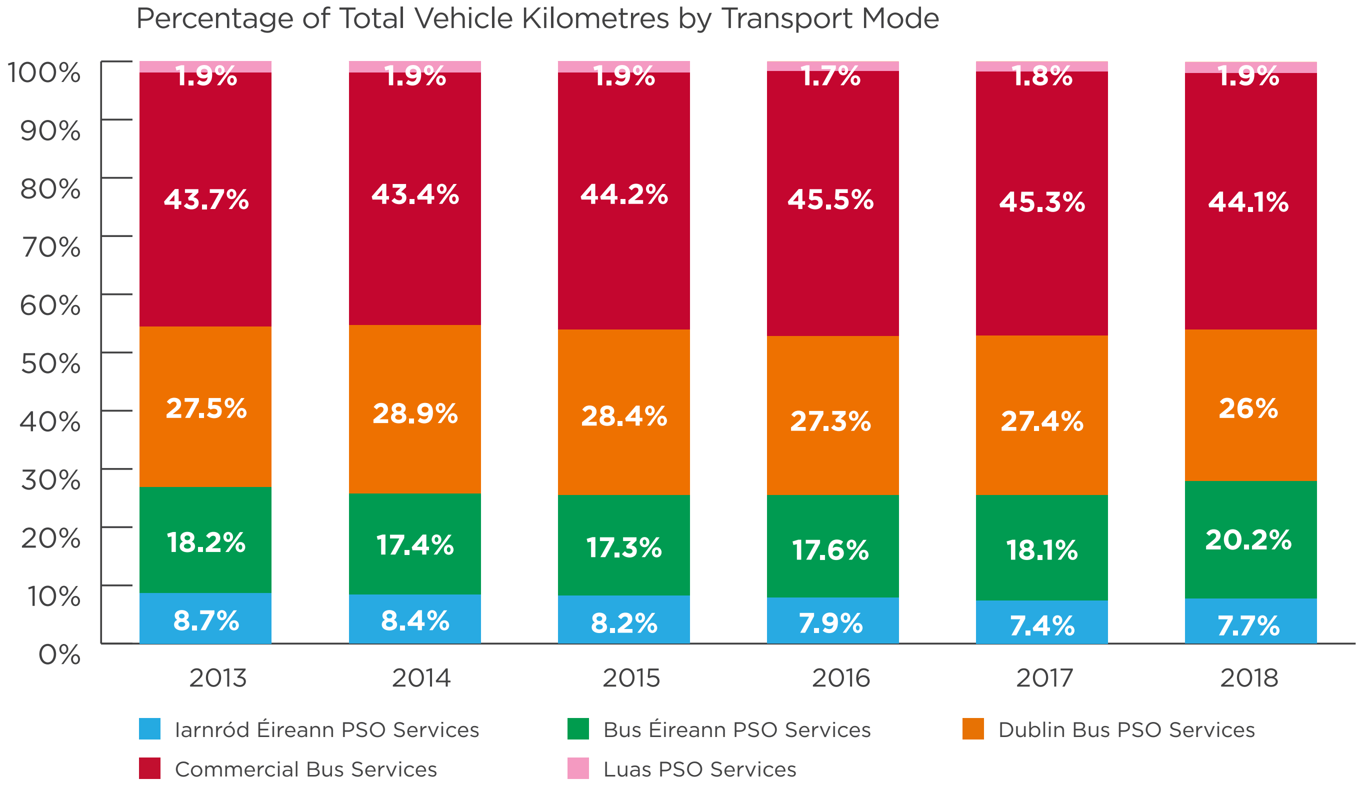


Figure 3.4: Percentage of all Vehicle Kilometres by Transport Sector



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 Employment Affairs and Social Protection's Free Travel Scheme.

In 2018, ticket revenue accounted for over 86% of all revenue, with Free Travel Scheme payments accounting for just under 14%. This is down from 2013, when Free Travel Scheme payments represented 15% of revenue. In line with this, the estimated number of free travel passenger journeys on commercial bus services has also reduced from an estimated 24% of all passenger journeys in 2013, to an estimated 18% of all passenger journeys in 2018. See Tables 4A and 4B.

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 2018 was broadly similar to the figures in 2017, taking account of the fact that some operators have not provided a return for 2018. See Table 4C.

Leap Card

The Leap card was introduced in late 2011 and is an integrated smart card which is available for both publicly subsidised and commercial bus services. There were 13 commercial operators in 2018 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 of Employment Affairs and 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 2018. This includes figures for commercial services provided by Bus Éireann e.g. Expressway and Dublin Bus e.g. 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 with scheduled vehicle kilometres 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 Percentage of All Revenue
2013	€115.89	€20.05	€135.94	-	14.8%
2014	€129.55	€20.10	€149.65	10%	13.4%
2015	€143.19	€20.42	€163.61	9%	12.5%
2016	€155.62	€20.49	€176.11	8%	11.6%
2017	€157.69	€20.10	€177.79	1%	11.3%
2018	€173.88	€28.32	€202.20	14%	14.0%

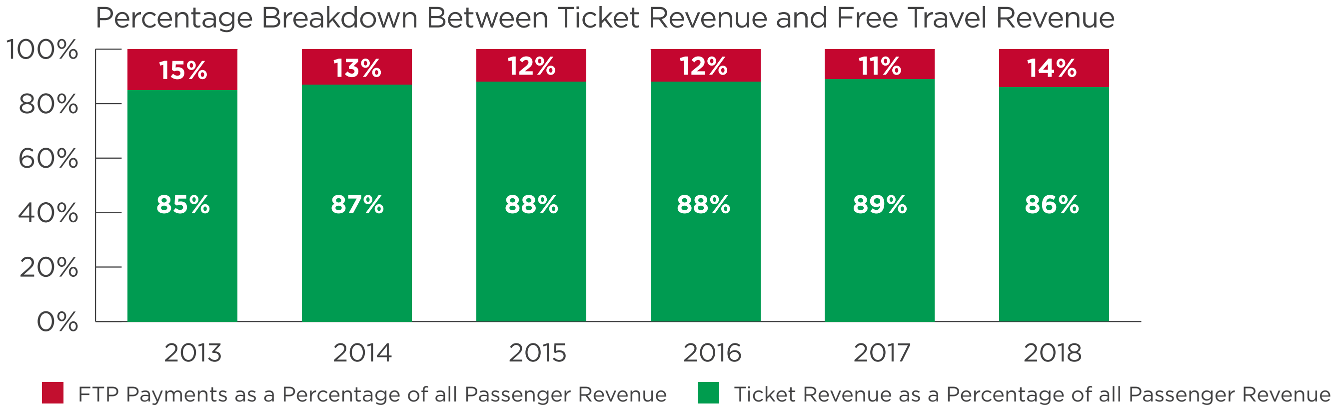
Table 4B: Percentage Change Per Year for Total Passenger Journeys, Scheduled Vehicle Kilometres and Ticket Revenue (Commercial Bus Services)

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%	13.7%

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%

Figure 4.1: Commercial Bus Services Comparison of Revenue Types by Year 2013-2018



5

Commercial Operator Fleet Size

The total number of vehicles that were used in 2018 to provide commercial bus services in the State was 1,325. 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 1,096 vehicle used on a full time basis to provide commercial bus services. This is an increase of 127 vehicles since 2013 providing these services on a full time basis. See Table 5A below.

For this bulletin a question was included for the first time on Daily Peak Vehicle Requirement per licence for services provided in 2018. 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 as 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, as well as midi and mini buses. These vehicles have a wide range of passenger seat capacities.

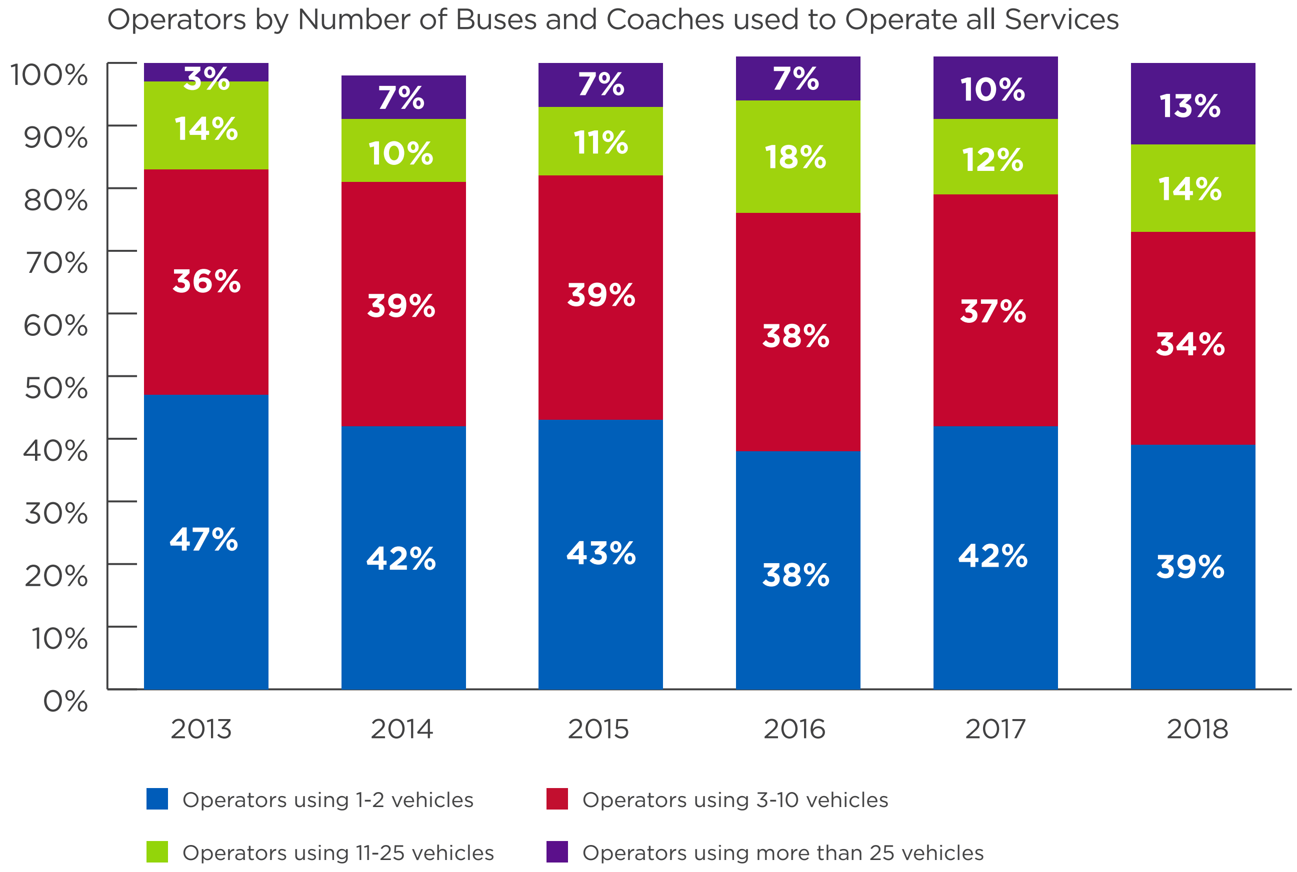
Table 5A: Total Number of Vehicles used to provide Commercial Bus Services

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

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

Year	Nationally	Non-GDA Services	GDA Services
2018	868	357	511

Figure 5.1: Comparison of Operators Total Number of Vehicles used by Year 2013-2018



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. For the first time this year the percentage of scheduled vehicle kilometres provided by accessible vehicles was requested on a per licence basis. This provided for a more detailed view of the proportion of scheduled vehicle kilometres provided by accessible vehicles. Accessible vehicles provided approximately 60% of all scheduled vehicle kilometres 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 164 more accessible vehicles in use in 2018 than 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 609, the greatest share were vehicles with wheelchair lifts. These accounted for 99 of the additional 164 vehicles. The remaining 65 vehicles were 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 than the number of vehicles, growing from 40% to 60% of the scheduled vehicle kilometres.

Low-floor vehicles suitable for wheelchair access

Low-floor vehicles accounted for 15% of the total vehicles reported as being used in 2018. 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.

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 may also require that appropriate bus stop infrastructure, for instance kerbs of a specific height, are in place.

Vehicles with lifts suitable for wheelchair access

Vehicles with wheelchair lifts accounted for 31% of the total vehicles reported as being used in 2018. These vehicle types provided 48% of the scheduled vehicle 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 passenger 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
Information was collected on the percentage of services provided by accessible vehicles on a per licence basis for the first time this year. This covered services provided in 2018.

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 calculations were done on a per licence basis.

Scheduled vehicle kilometre figures provide a more accurate reflection of the accessibility of commercial bus services. Nationally the figures indicate that three out of every five scheduled vehicle kilometres provided by commercial bus services were wheelchair accessible in 2018. This is up from two out of every five schedule kilometres in 2013. In particular, Table 6D shows the percentage of all schedule 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 2013-2018

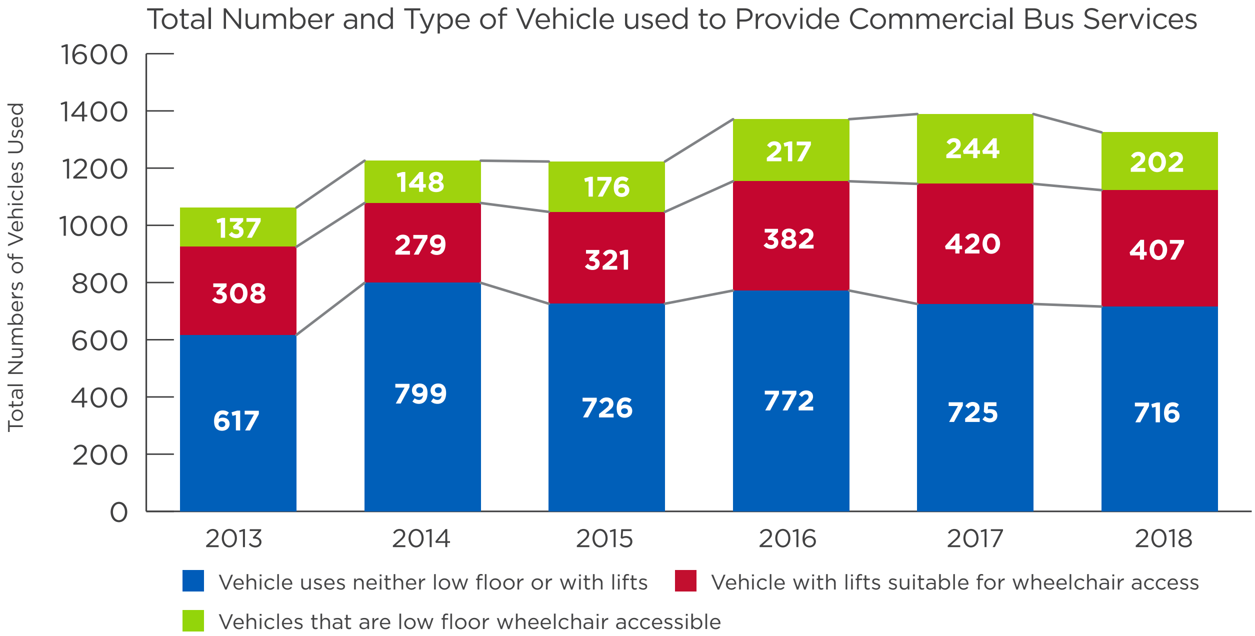


Table 6A: Overall Fleet Percentage of Accessible Vehicles

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%

Table 6B: Estimation of 2018 Accessible Scheduled Vehicle Kilometres by Area and Type of Vehicle based on a by service basis

2018 KM/ Area Operated	Nationally	Non-GDA Services	GDA Services
Total Accessible Scheduled Vehicle KM Operated	60%	62%	60%
Accessible Scheduled Vehicle KM Operated by Low-Floor vehicles	12%	13%	12%
Accessible Scheduled Vehicle KM Operated by vehicles with lifts for wheelchairs	48%	49%	48%

Table 6C: Estimation of 2013-2018 Total Scheduled Vehicle Kilometres provided by Accessible vehicles

Year	Total Scheduled Vehicle KM Nationally	Accessible KM based on Operating Fleet	Vehicle KM Operated by Accessible Vehicles
2013	80.1	31.4	39%
2014	82.2	35.9	44%
2015	86.3	47.4	55%
2016	92.1	55.8	61%
2017	92.3	55.9	61%
2018	93.1	56.0	60%

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

2018 KM/ Area Operated	Nationally	Non-GDA Services	GDA Services
Total where 100% of Service KM provided by Accessible Vehicles	44%	54%	31%
Total where 0% of Service KM provided by Accessible Vehicles	30%	26%	16%

7

Commercial Operating Fleet with Automated Vehicle Location Systems

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 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 it facilitates the provision of real time bus passenger information.

The number of vehicles providing commercial bus services equipped with AVL systems has increased from 60% in 2013 to 76% of all vehicles used in 2018. 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 real time passenger information ("RTPI") facility that is available through on-street displays, the website, 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 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%	1062
2014	812	66%	1227
2015	807	66%	1223
2016	960	70%	1371
2017	1038	75%	1389
2018	1012	76%	1325

8

Commercial Fleet Age

The average age of vehicles providing commercial bus services has remained low and relatively unchanged over the six year period between 2013 and 2018. The average age of the total fleet of vehicles used from 2013 to 2018 has decreased from 6.8 to 6.6 years. The average age of the vehicles used full time increased by approximately one year, from just over seven years to eight years old. Over this timeframe the total number of vehicles increased by 263 and the number of vehicles being used on a full time basis increased by 127. See Figure 8.1 and Tables 8A and 8B.

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 over the six year timeframe between 2013 and 2018, the average age of the vehicles in the first two categories decreased and there was a two year increase in the average age category of operators using more than 40 vehicles.

This indicates significant investment in the commercial fleet by commercial operators which has seen increases in the fleet size by over 25% in six years, while maintaining a low average vehicle age, or actually decreasing it. See Figures 8.2 and 8.3.

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 2013-2018

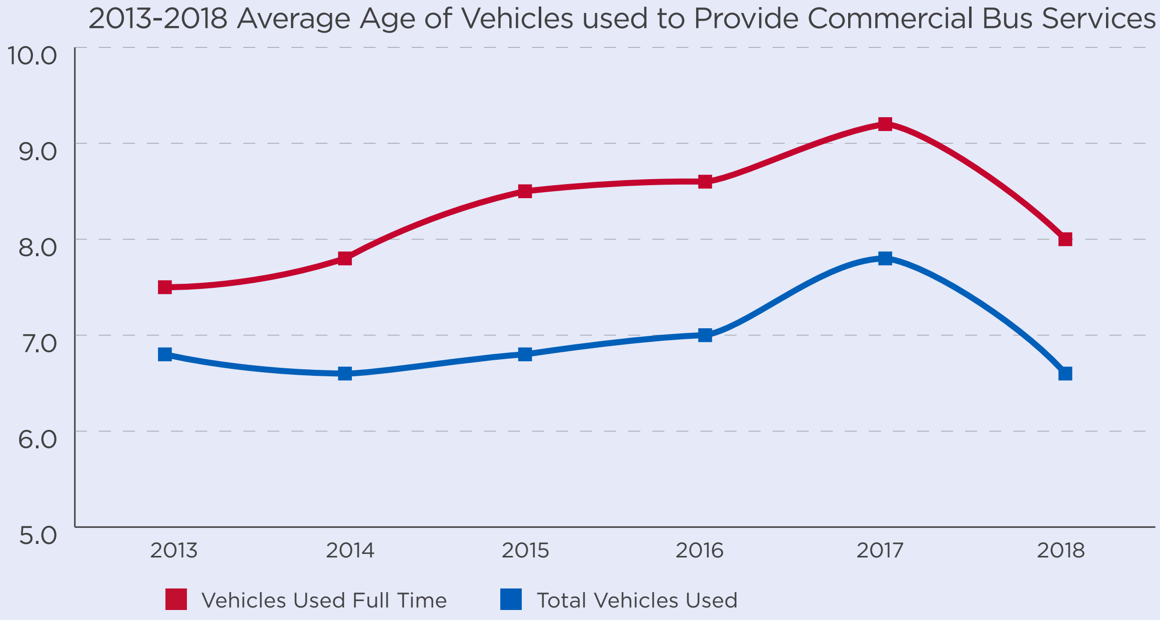


Table 8A: Average Age (in years) of Total Fleet of Vehicles used to provide Commercial Bus Services

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

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

Year	Average Vehicle Age in 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

Figure 8.2: Average Age (in years) of Vehicles used by Operator Fleet Size (Full Time Vehicles) 2013-2018

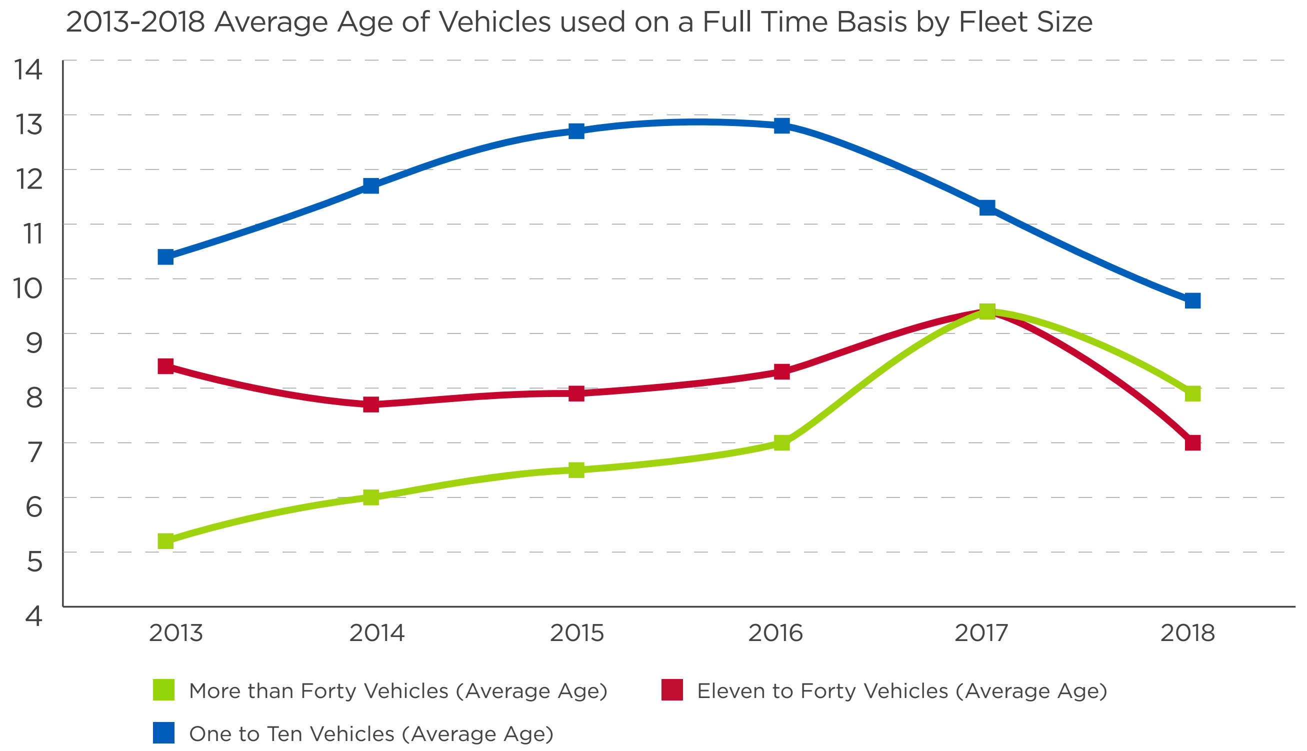
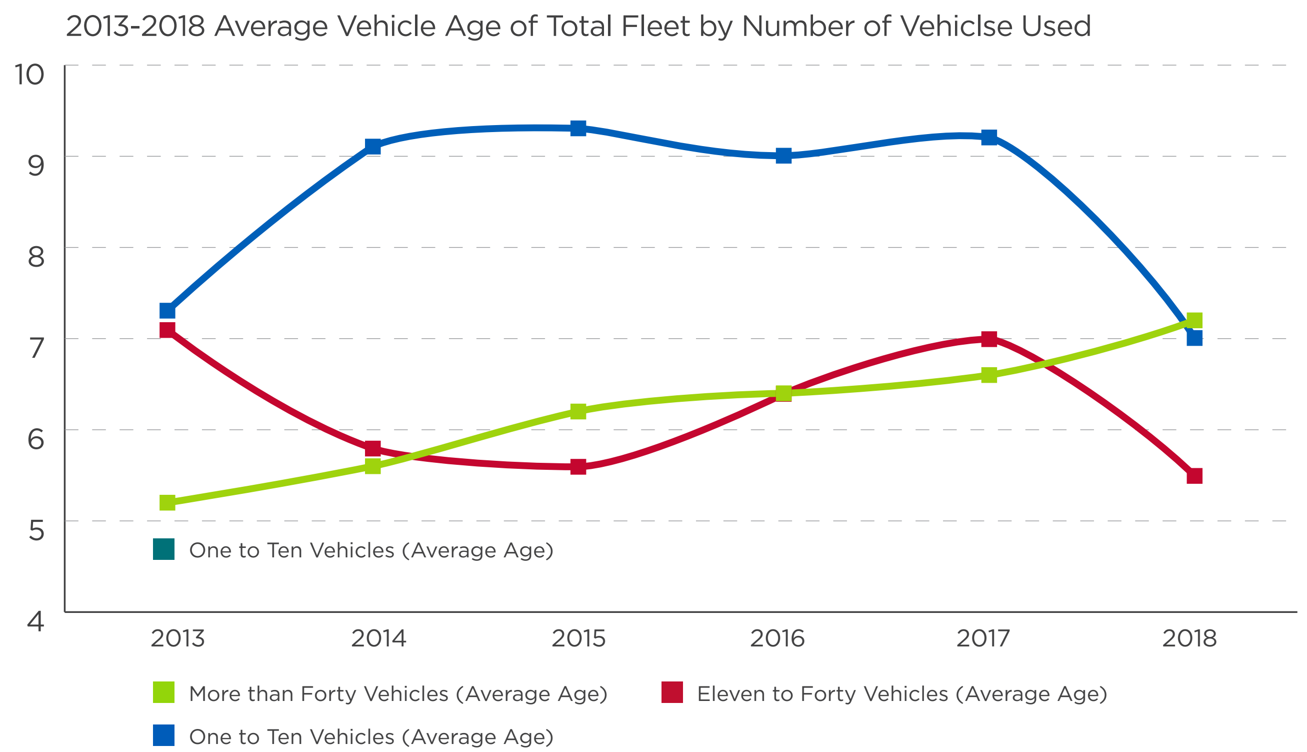


Figure 8.3: Average Age (in years) of Vehicles used by Operating Fleet (Total Fleet Used) 2013-2018



Údarás Náisiúnta Iompair
National Transport Authority

For Further Information:

Media enquiries:
Dermot O'Gara
T: +353 (0)1 879 8346

Statistical enquiries:
Ciaran O'Gorman
T: +353 (0)1 879 8363

National Transport Authority
Dún Scéine
Iveagh Court
Harcourt Lane
Dublin 2
D02 WT20