Statistical Bulletin: 03 / 2019

NTA
Údarás Náisiúnta Iompair
National Transport Authority

Bus & Rail Statistics

for Ireland - State Funded Services

Bulletin Topics:

- Total Number of PSO Passenger Journeys
- PSO Passenger Journeys by Region
- Total Operated Vehicle Kilometres and Vehicle Seat Kilometres
- Passenger Revenues
- Passenger Revenues by Region
- Free Travel Scheme Revenue
- Public Service Obligation (PSO) Subsidy
- Total Number of Buses
- Age of Buses
- Rail Network Changes
- Operating Fleet with Wheelchair Accessibility
- Gross Cost Contract Operators

Statistical Qualification - it is important to note that the figures used in this bulletin are intended to illustrate broad trends and are not meant to be read as exact calculations. Rounding has being used and this could affect overall percentages. It should also be noted that some prior year comparative amounts have been reclassified on a basis consistent with the current year.

Data for the LocalLink rural transport programme is subject to further verification; however the broad trends illustrated by the data are valid.

There can also be approximations for a number of reasons. Reporting periods could differ slightly due to calculation methods and this would limit the precise accuracy. Other factors could affect figures e.g. severe weather conditions, amendments to routes, et cetera.

Introduction

This statistical bulletin is a publication of the National Transport Authority of Ireland ("the Authority"). It focuses on bus services provided by Dublin Bus, Bus Éireann, the LocalLink rural transport programme and a small number of private operators who have been successful in tender competitions to operate a number of routes. This year the bulletin will also include the routes from tendered services resulting from Bus Market Opening. On the rail side it focuses on heavy rail services provided by Iarnród Éireann (Irish Rail) and Luas light rail services.

On 1st December 2009 the Dublin Transport Authority Act 2008 and the Public Transport Regulation Act 2009 came into effect. Under these Acts the Authority signed contracts with Dublin Bus, Bus Éireann and Iarnród Éireann. These contracts were new and much more comprehensive than previous arrangements. Subsequent contracts were signed with Dublin Bus and Bus Éireann in December 2014. The contract with Iarnród Éireann was a 10 year contract and will remain in place until November 2019. These contracts are subsidised because the operators are required to deliver what are called Public Service Obligations (PSO). PSO services are socially necessary transport services which may not be commercially viable and require a state subsidy to operate.

The Authority has the statutory obligation to secure the provision of light railway passenger services in the Greater Dublin Area (GDA). In September 2014 the Authority co-signed with the Railway Procurement Agency (RPA), now part of Transport Infrastructure Ireland (TII) a five year contract with Transdev Dublin Light Rail Limited to operate the Luas services. The Authority has assigned aspects of its statutory function to the RPA and in turn to TII, however, Luas fares, marketing, promotions, customer facing website and apps, and any alterations to them are determined by the Authority.

Between 2013 and 2016 the Authority had issued two separate bulletins dealing with PSO passenger services, one focused on bus operators and the second focused on rail operators. In 2017 the two bulletins were combined into one which will focus on all PSO transport operators. By combining the two bulletins, regional data based on rail and bus together can be shown together.

The Authority came into effect on 1 December 2009 and hence the annual statistics in this bulletin begin in 2010 and cover the period 2010 to 2018 inclusive. Some data from prior to 2010 is referenced such as passenger journeys in order to give a historical perspective to data in recent years.

Dublin Bus and Bus Éireann currently provide the majority of PSO bus services under contract to the Authority. In April 2018, the Authority also formally entered into a contract with Go-Ahead Ireland for the operation of a number of local and orbital bus routes in Dublin. The new operator commenced the phased implementation of services in September 2018, and for this reason, operational performance is provided in respect of passenger numbers and revenues within the Dublin region, and subsidy only within this document.

Four other public service contracts are currently in place with the Authority, with M&A Coaches Ltd., Andrew Wharton Coach Hire, Bernard Kavanagh and Sons Ltd, and J.J. Kavanagh & Sons who commenced operation of a new service between Naas and Blanchardstown in March 2018. As these contracts are very small in comparison to the main transport operators the details in respect of these contracts are outlined separately in Chapter 12 of this document.

LocalLink provides bus services in many areas of rural Ireland with passenger journeys tending to be local in nature and a number of services delivering passengers door-to-door. The programme is also grant-aided by the State via the Authority. Management of this programme was transferred to the Authority in April 2012 and its statistics have also been included to the extent they were collected and are available.

Data on the operational performance of the transport operators in the form of quarterly reports on the key performance indicators of these public service contracts can be found on the Authority's website www.nationaltransport.ie under the heading Public Transport Services.

The data provided in this bulletin is based on the public transport operator annual returns.

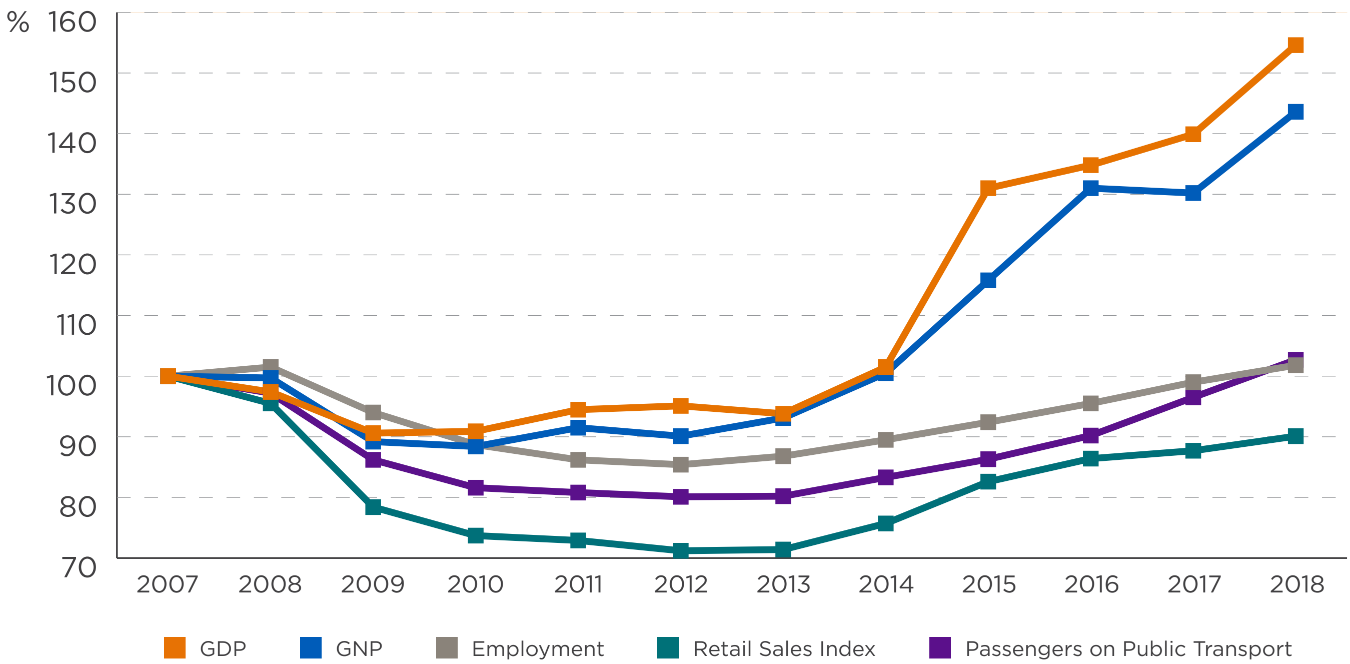
The 2018 data in the bulletin is provisional as at the date of publishing a number of the operators had not finalised their 2018 annual accounts. However it is not anticipated that the trends illustrated by the 2018 data in this bulletin will vary significantly.

1

Total Number of PSO Passenger Journeys

Demand for public transport services is strongly related to economic activity. Increases in employment, disposable income, and consumer spend all contribute to economic growth, which in turn, leads to increased demand for travel. Economic decline produces the opposite effect. This has been clearly demonstrated over the past decade.

Public Transport Usage & Economic Performance (Base Year 2007)



In 2007, passenger numbers travelling by public transport were at a peak based on passenger journeys in the annual reports of the transport operators. As the first sign of economic decline was evident in 2008, passenger journey numbers on public transport began to decline. The year 2009 saw the largest decline in passenger journeys when numbers fell by more than 10% across all modes of public transport. Total passenger journeys on public transport continued to decline, but at much slower rate, over the next three years up to 2012 although some services such as Luas did see some growth as new Luas lines were opened.

By 2013, the decline in total public transport passenger journeys had halted as the economy began to stabilise. In the five years since 2013 growth in total passenger journeys has been strong with total growth rates across all modes of PSO funded public transport. Total PSO passenger journeys grew by 16 million in 2017 and by the same margin in 2018, representing consecutive annual growth in excess of 6%.

While recovery in the economy was a significant element in the growth of passenger journeys from 2012 the on-going redesign of the bus networks particularly in the cities of Dublin, Cork, Galway and Limerick have contributed to passenger journey growth. This redesign of the networks is carried out by the Authority in conjunction with the bus operators.

Over 268 million passenger journeys were carried on PSO services in 2018, surpassing a previous high of 260 million in 2007. This compares to a low of 210 million in 2012.

Tables 1A and 1B along with Figure 1.1 illustrate the changes in passenger journeys on exchequer funded public transport services across the State between 2010 and 2018.

Table 1A: Annual PSO Public Transport Passenger Journeys, 2010-2018 (millions)

Year/ Operator	Dublin Bus	Bus Éireann PSO Services	LocalLink bus services	Iarnród Éireann	Luas	Other PSO Services*	Total Passenger Journeys	Change in Passenger Journey numbers
2010	117.05	29.13	1.42	38.23	27.53		213.36	
2011	115.05	28.48	1.74	37.38	29.10		211.75	-1.61
2012	113.28	28.63	1.73	36.74	29.32		209.70	-2.05
2013	112.49	28.64	1.74	36.74	30.51		210.12	0.42
2014	116.26	29.69	1.76	37.80	32.61		218.12	8.00
2015	119.82	30.23	1.76	39.66	34.60		226.07	7.95
2016	125.35	32.12	1.79	42.80	34.03		236.09	10.03
2017	136.26	31.13	1.89	45.51	37.65	0.064	252.50	16.40
2018	140.04	35.25	2.00	47.96	41.84	1.57	268.66	16.15

Table 1B: Percentage Change Of Annual Passenger Journeys

Year/ Operator	Dublin Bus	Bus Éireann PSO Services	LocalLink bus services	Iarnród Éireann	Luas	Other PSO Services*	Total Passenger Journeys
2011	-1.7%	-2.2%	22.5%	-2.2%	5.7%		-0.8%
2012	-1.5%	0.5%	-0.6%	-1.7%	0.8%		-1.0%
2013	-0.7%	0.0%	0.6%	0.0%	4.1%		0.2%
2014	3.4%	3.7%	1.0%	2.9%	6.9%		3.8%
2015	3.1%	1.8%	0.2%	4.9%	6.1%		3.6%
2016	4.6%	6.3%	1.6%	7.9%	-1.6%		4.4%
2017	8.7%	-3.1%	5.6%	6.3%	10.6%		6.9%
2018	2.8%	13.2%	5.8%	5.4%	11.1%	N/A	6.4%

The data in Table 1A shows the number of passenger journeys carried by individual operators over the period 2010 to 2018. In general, the numbers reflect trends in the economy with a fall in passenger journey numbers in 2011. In 2012 Dublin Bus and Iarnród Éireann passenger journeys continued to decline but the level of decline was easing off. In 2013 passenger journey numbers stabilised at Bus Éireann and Iarnród Éireann, and the rate of decline at Dublin Bus continued to ease off. In 2014 passenger journeys grew for all operators for the first time in a number of years. 2014 saw growth of 8 million passenger journeys and this level of growth continued in 2015. 2016 and 2017 saw increasing growth year on year, with an additional 16 million passenger journeys carried by the PSO operators in 2017. Growth has continued strongly with 6.4% increases in passenger journeys in 2018, bringing the total to over 268 million. This surpasses peaks of 260 million seen in 2007 for the first time.

Luas passenger journeys did not follow the pattern of the other operators with growth each year except in 2016. Growth in Luas passenger journeys in 2011 was aided by the opening of extensions to both the green line and the red line between December 2009 and July 2011. The falloff in passenger numbers in 2016 can be attributed to two events, namely a partial closure of the red line for 6 weeks to allow for works and 12 days of industrial action. Luas passenger journeys were up by over 10% to 37.65 million in 2017, a trend that has continued in 2018 with the highest rate of year on year growth for the Operator of 11.1%, with 41.84 million passenger journeys. The opening of Luas CrossCity on 9th December 2017 has undoubtedly heavily influenced the growth of passenger journeys seen in recent years.

Iarnród Éireann carried 47.96 million passenger journeys in 2018, growing by 5.4% in the year and representing record levels of operation, which have been supported by the introduction of 10-minute Dart in the latter part of the year.

Other PSO services including recently introduced Go Ahead and J.J. Kavanagh, have further boosted growth in overall PSO patronage with encouraging passenger numbers since their inception.

Bus Éireann PSO services seen an upturn from 2017, where results were influenced by 21 days of industrial action when no services operated. Passenger journeys of 35.25 million in 2018 however, represent a recovery of considerable ground, with a year on year swing of 4.12 million, and a return to growth of some 13.2%.

Dublin Bus, Bus Éireann and the Authority are continuing to redesign parts of the network on an on-going basis where they see that a better service can be provided to the travelling public. Rail travel does not offer this flexibility but over time extensions can be added to the network such as Luas CrossCity or providing services through the Phoenix Park Tunnel. Details of changes to the rail network are included at Chapter 10 of this bulletin.

LocalLink bus services saw annual passenger journeys rise substantially between 2010 and 2011. This increase was partially due to new reporting methods that saw the inclusion of passengers on additional contracted services. Since then LocalLink passenger journeys have shown some growth although not as much as the larger operators. In 2018 however, LocalLink saw strong growth of 11%, their best year since 2011. This is mainly as a result of the introduction of over 50 new services since 2016.

The public transport operators over time review all aspects of their operations with a view to improving their services and enabling them to get more accurate data on their services. As a result of these improvements the method of counting passenger journeys has become more accurate. When this occurs the operator usually restates the data for the previous year so as it can be compared with the current year and future years. Bus Éireann has restated their 2013 passenger journeys while Iarnród Éireann has restated their 2012 passenger journeys. While the restatement will result in a slight adjustment to the comparison between one year and the next, it will not affect the overall trend in passenger journey growth over a number of years.

Figure 1.1: PSO Public Transport Passenger Journeys, 2010-2018

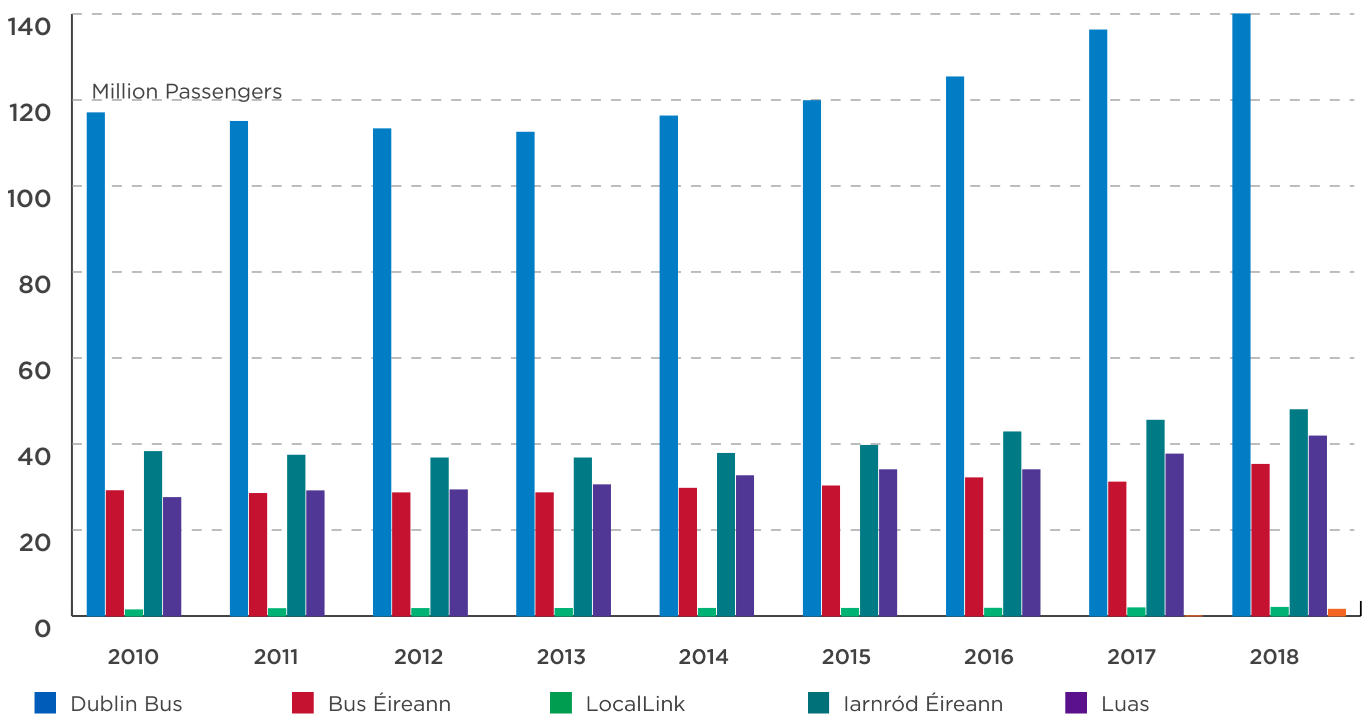


Table 1C: Percentage of 2018 PSO Passenger Journeys Carried by Each Operator

Year/ Operator	Dublin Bus	Bus Éireann PSO Services	LocalLink bus services	Iarnród Éireann	Luas	Other PSO Services	Total Services
Passenger Journeys (million) 2018	140.04	35.25	2.00	47.96	41.84	1.57	268.66
% of Total Passenger Journeys by Operator	52.1%	13.1%	0.7%	17.9%	15.6%	0.6%	100%

In any particular year there may be events which will affect the passenger journey numbers for one or other operator. One such event is industrial action. In 2017 Bus Éireann services did not operate for 21 days in March and April due to industrial action. Iarnród Éireann had two days of industrial action in November 2017 along with a number of stoppages associated with the Bus Éireann dispute. 2017 also saw the arrival of ex-hurricane Ophelia which disrupted most public transport services for at least one day with Luas not operating for a second day due to damage caused during the largest storm to hit Ireland in almost 50 years. Extreme weather events also impacted on 2018 figures, with the onset of Storm Emma in March, resulting in the cancellation of services over a number of days.

In 2016 Luas lost 12 days due to industrial action and Dublin Bus lost six days. For Bus Éireann there was no PSO bus services operated on two days in May both in 2013 and in 2015 while Dublin Bus had no PSO bus services for three days in August 2013 and two days in May 2015. Iarnród Éireann had two days of industrial action in August 2014 and a three hour stoppage during the morning peak in October 2015. This industrial action would have a dampening effect on the passenger journeys for the operators in the relevant year.

Figure 1.1 shows the total passenger journeys by operator from 2010 to 2018. It is clear from the chart that Dublin Bus carries many more passengers than all of the other PSO operators. Table 1C and Figure 1.2 shows that Dublin Bus actually carried 52.1% of all PSO passenger journeys in 2018. Iarnród Éireann is next carrying 17.9% while Luas carries 15.6%. Bus Éireann's market share of the PSO passengers is at 13.1% while LocalLink and other PSO services represent 1.3% of total PSO passenger journeys.

Figure 1.3 shows all PSO passenger journeys combined from 2010 to 2018. This shows that passenger journey numbers declined from 2010 to 2012 and stabilised in 2013. The chart shows strong growth since 2014, which has continued through to 2018, with an annual increase of 6.4%.

Figure 1.2: 2018 PSO Passenger Journeys Split by Operator

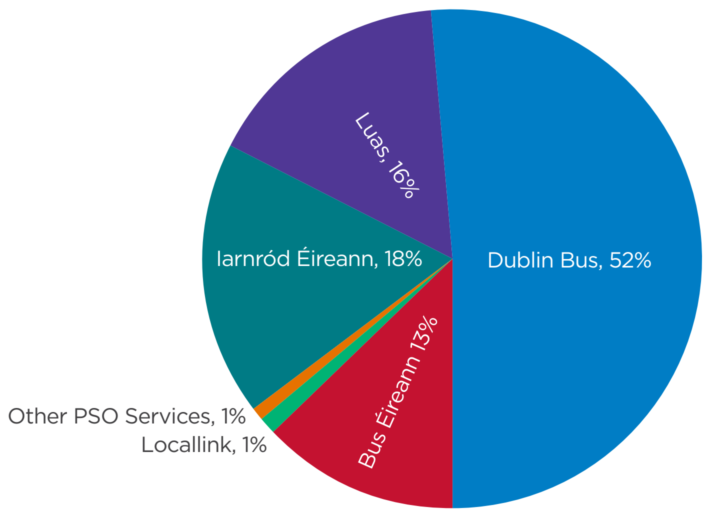
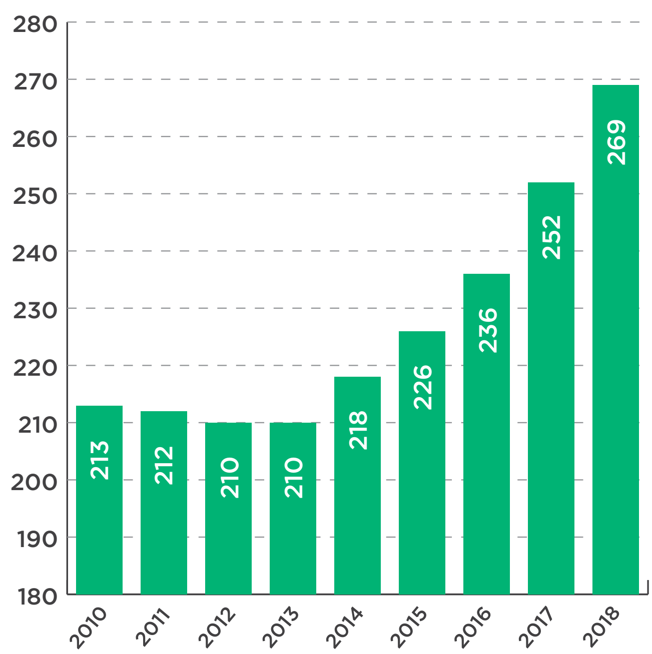


Figure 1.3: Total PSO Passenger Journeys 2010 to 2018 in Millions



2

PSO Passenger Journeys by Region

As seen in Table 1.C Dublin Bus carries more than half of the total passenger journeys in Ireland. While they mainly operate within Dublin City, they also offer some services in North Kildare and North Wicklow. Iarnród Éireann carried 17.9% of the passenger journeys yet they operate over a much larger geographical region providing services in 23 of the 26 counties along with services to Northern Ireland. Bus Éireann PSO services provide services to all 26 counties, and similar to Iarnród Éireann offer services to Northern Ireland. Luas on the other hand provide services in Dublin City only. LocalLink services operate in all 26 counties with a small number of services extending into Northern Ireland.

The tables below will look at passenger journeys in the Dublin Region, the Greater Cork City Region and the rest of the country which will include Galway, Limerick and Waterford cities, stage carriage services on Bus Éireann and Iarnród Éireann intercity services. Stage carriage services provided by Bus Éireann are those services linking satellite towns and villages to the main towns and cities throughout the country. As outlined earlier the data shown in this bulletin is intended to highlight trends in public transport services partially funded by the exchequer and are not intended as exact calculations. This is especially true when looking at passenger journeys and in Chapter 4 at passenger revenues. This is due to changes in routes and services over time. For example a small number of Bus Éireann services which previously were included in their stage carriage services a few years ago are now more appropriately included in one of their city services, and likewise Dublin Commuter has now been split with some services categorised as Stage Carriage “East”. No adjustment has been made to the data shown to account for these changes. Dublin Bus also adjust their services and with more cross-city and orbital routes, passengers may be able to complete their journey by taking one trip while previously it may have required two trips.

Table 2A and 2B show the passenger journeys for the Dublin region. Dublin Bus, Go Ahead, Bus Éireann Dublin commuter services, Iarnród Éireann DART and Dublin commuter services, and Luas operate in this area. Since 2013, total passenger journeys have grown annually in the Dublin region, with total passenger journey growth in excess of 27%.

There are some exceptions to the continuous growth however, namely Luas in 2016 when they had a small section of the line closed for six weeks along with 12 days of industrial action, Bus Éireann Dublin commuter services in 2017 when they operated no services for 21 days due to industrial action, and similarly in 2018, where services were heavily impacted through severe weather conditions.

Table 2A: Dublin Region Annual Passenger Journeys (Millions)

Year/ Operator	Dublin Bus & Go Ahead	Bus Éireann Dublin Commuter	Iarnród Éireann DART & Dublin Commuter	Luas	Total Passenger Journeys
2013	112.49	6.45	25.94	30.51	175.39
2014	116.26	6.73	26.53	32.61	182.13
2015	119.82	6.79	28.12	34.60	189.33
2016	125.35	7.30	30.95	34.03	197.62
2017	136.26	6.79	32.77	37.65	213.47
2018	141.46	5.85	34.23	41.84	223.38

Table 2B: Percentage Growth of PSO Passenger Journeys in Dublin Region 2013 to 2018

Year/ Operator	Dublin Bus & Go Ahead	Bus Éireann Dublin Commuter	Iarnród Éireann DART & Dublin Commuter	Luas	Total Passenger Journeys
2013 to 2018	25.8%	-9.2%	32.0%	37.1%	27.4%

Figure 2.1: Dublin Region Annual PSO Passenger Journeys

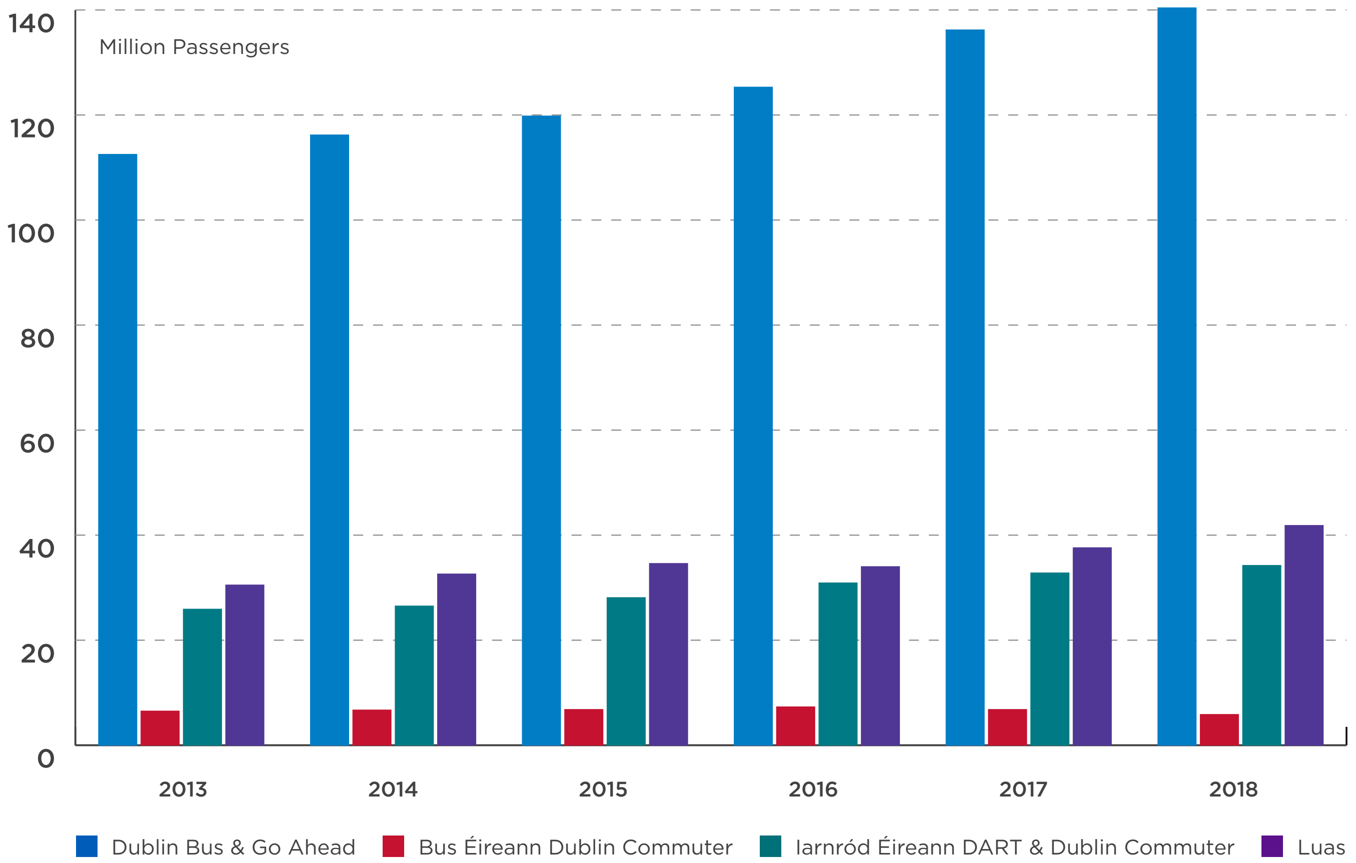


Table 2B shows that the strongest growth in the Dublin region was on Luas services where there was 37.1% growth between 2013 and 2018. Iarnród Éireann DART & Dublin Commuter and Dublin Bus also performed very well during this period with Bus Éireann showing a reduction mostly due in part to a period in 2018 when no services operated.

Table 2C and Figure 2.2 show the passenger journeys using PSO subsidised public transport in Cork commuter areas. Both Bus Éireann and Iarnród Éireann provide services in the Cork commuter area. The difference in passenger journeys in Cork commuter area compared to the Dublin region is striking. The Dublin region has about 15 passenger journeys on public transport for every one passenger journey in Cork, 15.26 million in Cork commuter area compared to 221.96 million in the Dublin region.

Table 2D shows the passenger journey growth between 2013 and 2018. Growth has been extremely strong at 32.9% with Iarnród Éireann Cork commuter services growing from a low base by over 44%. The growth in Cork City by Bus Éireann has been greatly helped by the reconfiguration of bus services in the city over the past few years. Aside from a fall in passenger journeys in 2017 owing to industrial action, Bus Éireann returned to growth in Cork in 2018 with figures showing a 15.3% increase on 2017, which is also a 31.9% increase since 2013.

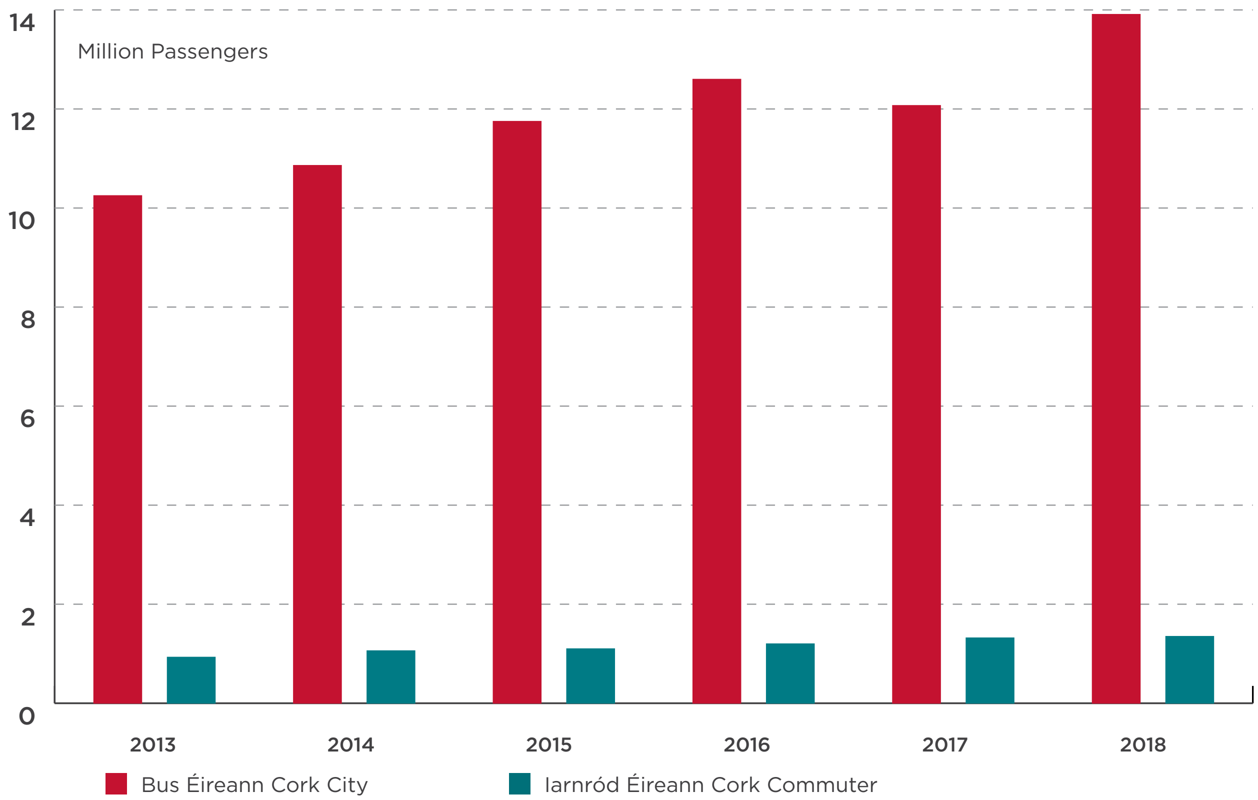
Table 2C: Cork Commuter Annual PSO Passenger Journeys (millions)

Year/ Operator	Bus Éireann Cork City	Iarnród Éireann Cork Commuter	Total Passenger Journeys
2013	10.25	0.93	11.18
2014	10.86	1.06	11.92
2015	11.75	1.10	12.85
2016	12.60	1.20	13.81
2017	12.07	1.32	13.39
2018	13.91	1.35	15.26

Table 2D: Percentage Change of Cork Commuter PSO Passenger Journeys 2013 to 2018

Year/ Operator	Bus Éireann Cork City	Iarnród Éireann Cork Commuter	Total Passenger Journeys
2013 to 2018	31.9	44.3%	32.9%

Figure 2.2: Cork Commuter Annual PSO Passenger Journeys



Outside of the Dublin region and the Cork commuter area services are provided by Bus Éireann in Galway, Limerick and Waterford cities along with stage carriage services throughout Ireland. Iarnród Éireann provides intercity services outside the Dublin region and Cork City commuter services while LocalLink provides local bus services in rural areas. Table 2E and Figure 2.3 show the passenger numbers on these services.

Table 2E: Annual Passenger Journeys Outside Dublin Region and Cork Commuter (millions)

Year/ Operator	Bus Éireann Galway	Bus Éireann Limerick	Bus Éireann Waterford	Bus Éireann Stage Carriage	Iarnród Éireann Intercity	LocalLink	Total
2013	3.82	2.76	0.83	4.54	9.88	1.74	23.56
2014	4.09	2.84	0.85	4.32	10.21	1.76	24.06
2015	3.96	2.82	0.83	4.09	10.44	1.76	23.89
2016	4.23	2.92	0.83	4.25	10.68	1.80	24.70
2017	4.18	3.18	0.75	4.16	11.41	1.89	25.57
2018	4.71	3.53	0.84	5.16	12.38	2.00	28.62

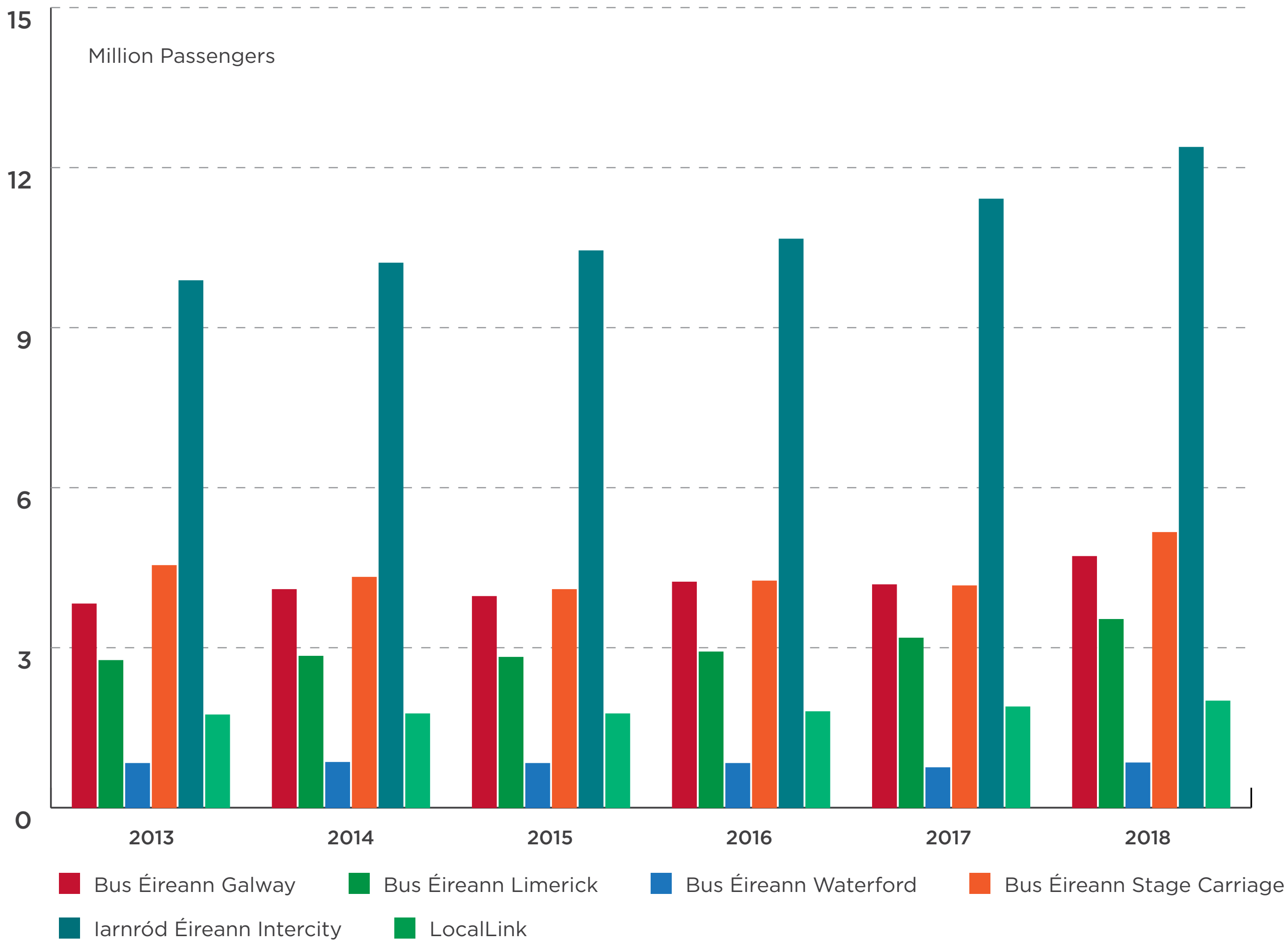
Total passenger journeys on these services was 28.62 million in 2018, around double the numbers for the Cork commuter area but again only a small fraction of the numbers using public transport in the Dublin region. Iarnród Éireann intercity services carry just less than half of these passengers while Bus Éireann services combined carry just over half of these passengers and the LocalLink buses carry the balance of around two million passenger journeys.

Table 2F: Percentage Change of PSO Passenger Journeys Outside Dublin Region and Cork Commuter

Year/ Operator	Bus Éireann Galway	Bus Éireann Limerick	Bus Éireann Waterford	Bus Éireann Stage Carriage	Iarnród Éireann Intercity	LocalLink	Total
2013 to 2018	23.5%	28.0%	1.1%	21.6%	25.3%	14.9%	23.0%

Iarnród Éireann intercity services have had steady growth between 2013 and 2016 but have since grown by 7% in 2017 and 8.5% in 2018, resulting in 25.3% growth over the five years shown above. Limerick City also had very strong growth in 2017 following a redesign of one of its main bus services early in 2017, and has continued in that vein in 2018 with further growth of 11%, resulting in the largest increase over 5 years (+28%). Waterford city services have also returned to growth in 2018 with improved timetables and more frequent services introduced, particularly at weekends. Targeted campaigns to promote the use of leap in Galway, Limerick and Waterford may also have fed into further growth in 2018.

Figure 2.3: Annual PSO Passenger Journeys Outside Dublin Region and Cork Commuter



When looking at the growth in passenger journeys between 2013 and 2018 the following observations can be made:

- Growth in overall terms is strong, with an average growth rate of 23% across all market segments.
- Iarnród Éireann Cork Commuter continues to lead the way with the highest growth rate over the 5-year period at 44%, with albeit lower levels of patronage. Iarnród Éireann DART & Dublin commuter has also shown strong growth, ranking third at +32% between 2013 and 2018.
- Luas has seen a significant increase in passenger journeys, which has resulted in growth of 37.1% since 2013, and sits second only to Iarnród Éireann Cork Commuter.
- Bus Éireann city services with the exception of Waterford have performed strongly with growth between 23% and 32%. Waterford city services have however overturned a decline in patronage to 2017, with marginally more passengers using services in the period to 2018.
- Dublin Bus have also strengthened in terms of patronage with growth of 24.5%.
- The one sector to experience a fall in growth over the five years to 2018 is Bus Éireann Dublin Commuter, with a drop of 9.2%.

It is interesting to note that two of the three divisions of Iarnród Éireann (Cork Commuter & Dart/Dublin Commuter) are at the top of the growth league with their third sector (intercity) also showing growth of 25%.

Figure 2.4 illustrates the growth rates in the different sectors with Iarnród Éireann Cork Commuter growing strongest and Bus Éireann Dublin Commuter showing a decline in passenger journeys over the period 2013 to 2018.

Figure 2.4: PSO Passenger Journey by Sector Percentage Change 2013 to 2018

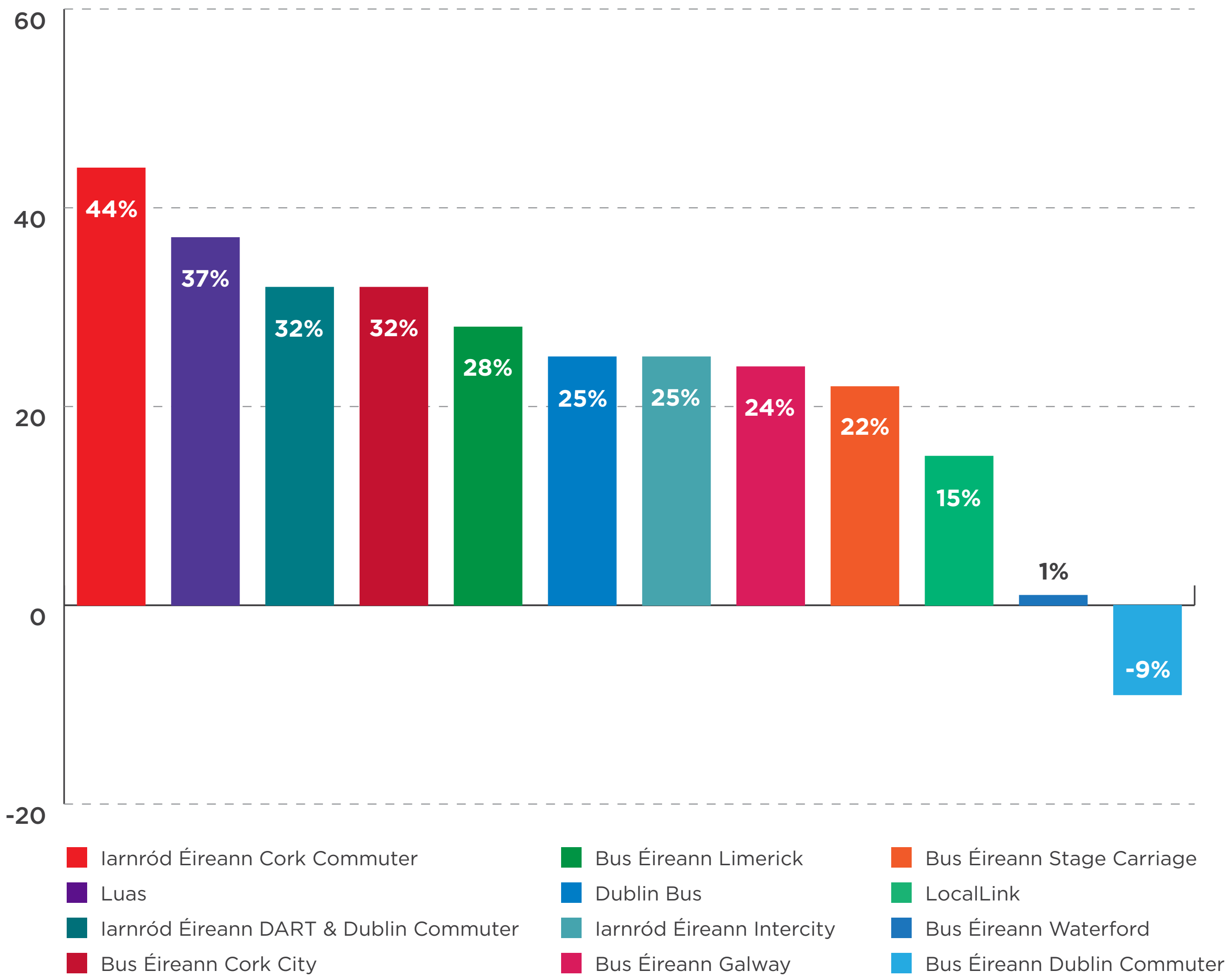


Figure 2.5: PSO Passenger Journeys by Sector 2018

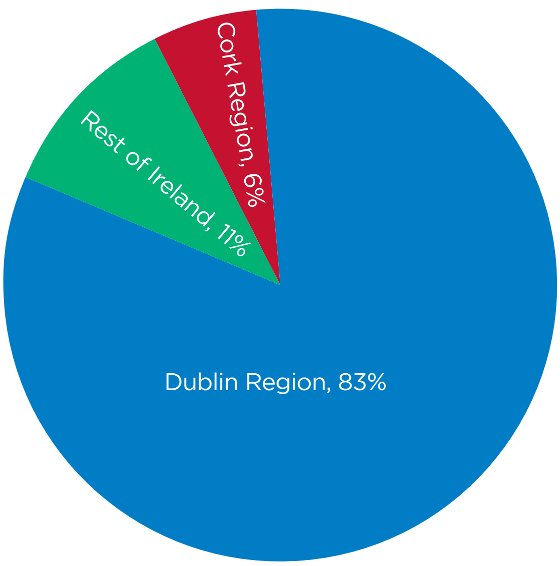


Figure 2.5 shows all passenger journeys in 2018 broken down into 3 regions: the Dublin region, the Cork region and the rest of Ireland. The chart shows that the Dublin region accounts for 83% of all PSO subsidised public transport passengers. The Cork region accounts for just 6% of all passengers while the rest of Ireland accounts for 11% of all passengers.

3

Total Operated Vehicle Kilometres and Vehicle Seat Kilometres

'Operated vehicle kilometres' refer to the actual amount of vehicle kilometres that a bus or rail company has operated in a given period, as opposed to 'scheduled vehicle kilometres' which would indicate the number of vehicle kilometres that they intended to operate as per their cumulative timetables.

'Vehicle seat-kilometres' meanwhile, is a unit of passenger transport capacity measuring the total number of seats available multiplied by the kilometres travelled.

The changes in both vehicle kilometres and vehicle seat kilometres operated by Dublin Bus, Bus Éireann, Iarnród Éireann and Luas across the State are shown in Tables 3A to 3D along with Figure 3.1.

Given that Dublin Bus, Bus Éireann and Iarnród Éireann operate a variety of vehicles with differing numbers of seats, vehicle seat-kilometres can be more instructive in illustrating actual transport capacity. However on city or commuter services passengers can stand for a short journey and that will increase the capacity available over the seated capacity. Iarnród Éireann commuter and DART in particular offer significant standing capacity on their vehicles and this standing capacity is not included in the vehicle seat kilometres outlined here. The Luas trams have an average of 70 seats per tram with total capacity including standing of 310. As most Luas passengers travel relatively short journeys many of them are required to stand for their journey. Therefore for Luas the vehicle seat-kilometres includes both seating and standing capacity on their trams.

In general both the vehicle kilometres and vehicle seat kilometres trended downwards between 2010 and 2014 as passenger journeys fell and then began to stabilise. The two bus operators have increased vehicle kilometres in recent years, as demand for services has increased and additional services are provided. The number of vehicle seat kilometres has increased by a larger percentage compared to vehicle kilometres for both bus operators and this is because the capacity of their new buses is larger than the buses which have been replaced allowing them to carry more passengers with the same number of services operated. In 2018, Dublin Bus figures have receded somewhat owing to a small portion of services being transferred, and also extreme weather events earlier in the year. Bus Éireann on the other hand have seen gains in both metrics owing to enhanced service delivery outside the GDA, with supporting marketing campaigns towards the use of leap.

Luas vehicle kilometres increased significantly in 2011 following the opening of Luas extensions in late 2010. In 2013 the vehicle kilometres reduced as the interval between some services was extended but this was reversed partially the following year. The reduction in vehicle kilometres in 2016 is due to a combination of closing the red Luas line between Jervis and the Point for six weeks to allow for Luas CrossCity works and 12 days of industrial action when no services were operated. In 2017 Luas recovered the lost kilometres from 2016 and increased the number of services as passenger journeys also increased. The opening of the Luas CrossCity extension to the Green line in December 2017 has also resulted in both increased kilometres operated, and seat kilometres in 2018, bolstered by increased capacity.

The operated vehicle kilometres by Iarnród Éireann remained constant over the years between 2010 and 2016 but the operated seat kilometres dropped each year between 2011 and 2014. This is because Iarnród Éireann implemented a fleet strategy which allowed them to maintain the number of services provided but reduce costs by matching more closely the number of carriages required to the number of passengers travelling. In 2015 and 2016 in line with passenger journey numbers growing they adjusted upwards the number of carriages used on various services thereby increasing the number of vehicle seat kilometres. In 2017 both their vehicle kilometres and seat kilometres dropped as a result of a number of factors namely two days of industrial action by Iarnród Éireann staff, a further two days when there was a large number of mostly intercity trains cancelled due to knock-on effects of Bus Éireann industrial action and two days of disrupted services due to ex- hurricane Ophelia along with a number of other minor events which disrupted operations. Results have however been reversed in 2018 with kilometres operated increasing by 7.7% with increased frequency's on Dart, despite capacity issues resulting in negligible change in seat kilometres.

Both bus operators changed the method used to calculate kilometres operated, and therefore seat kilometres operated also changed by Bus Éireann in 2014 and Dublin Bus in 2015. Following this change in calculation methodology Bus Éireann restated their 2013 vehicle kilometres operated and vehicle seat kilometres operated while Dublin Bus restated their 2014 figures. As a result the 2013 Bus Éireann vehicle kilometres operated and vehicle seat kilometres operated is not directly comparable with previous years. Similarly Dublin Bus 2014 figures are not directly comparable with previous years.

Table 3A: Annual Operated Vehicle Kilometres (millions)

Year/Operator	Dublin Bus	Bus Éireann	Iarnród Éireann	Luas
2010	56.50	38.08	15.95	2.897
2011	53.90	37.34	15.96	3.687
2012	52.10	37.34	15.96	3.835
2013	50.30	33.34*	15.967	3.544
2014	54.73*	32.94	15.965	3.667
2015	55.34	33.76	15.965	3.664
2016	55.32	35.74	15.955	3.490
2017	55.98	36.90	15.045	3.66
2018	54.91**	42.73	16.20	4.07

*In 2014 Bus Éireann and in 2015 Dublin Bus changed the method used to calculate the annual operated vehicle kilometres. As a result of this change Bus Éireann restated their 2013 annual operated vehicle kilometres while Dublin Bus restated their 2014 annual operated vehicle kilometres.

**Some of this reduction relates to the transfer of services to Go Ahead Ireland.

Table 3B: Percentage Change of Annual Operated Vehicle Kilometres (millions)

Year/Operator	Dublin Bus	Bus Éireann	Iarnród Éireann	Luas
2011	-4.6%	-1.9%	0.1%	27.3%
2012	-3.3%	0.0%	0.0%	4.0%
2013	-3.5%	3.7%*	0.0%	-7.6%
2014	-2.8%*	-1.2%	0.0%	3.5%
2015	1.1%	2.5%	0.0%	-0.1%
2016	0.0%	5.9%	-0.1%	-4.7%
2017	1.2%	3.2%	-5.7%	12.1%
2018	-1.9%**	15.8%	7.7%	11.0%

*In 2014 Bus Éireann and in 2015 Dublin Bus changed the method used to calculate the annual operated vehicle kilometres. As a result of this change Bus Éireann restated their 2013 annual operated vehicle kilometres while Dublin Bus restated their 2014 annual operated vehicle kilometres. Therefore the comparison between 2012 and 2013 for Bus Éireann and between 2013 and 2014 for Dublin Bus reflects the percentage change before the restatement.

**Some of this reduction relates to the transfer of services to Go Ahead Ireland.

Table 3C: Annual Operated Vehicle Seat Kilometres (millions)

Year/Operator	Dublin Bus	Bus Éireann	Iarnród Éireann	Luas
2010	3,629.3	2,298.2	7,063.1	898.4
2011	3,475.0	2,260.4	6,677.6	1,143.1
2012	3,342.9	2,255.4	6,623.0	1,188.9
2013	3,222.8	2012.7*	6,398.0	1,098.8
2014	3516.56*	2,007.4	5,707.0	1,137.0
2015	3,523.6	2,116.0	6,123.2	1,135.8
2016	3,458.7	2,326.7	6,208.3	1,081.9
2017	3,536.5	2,453.6	5,961.4	1,134.91
2018	3,345.5**	2,841.2	5,986.6	1,260.30

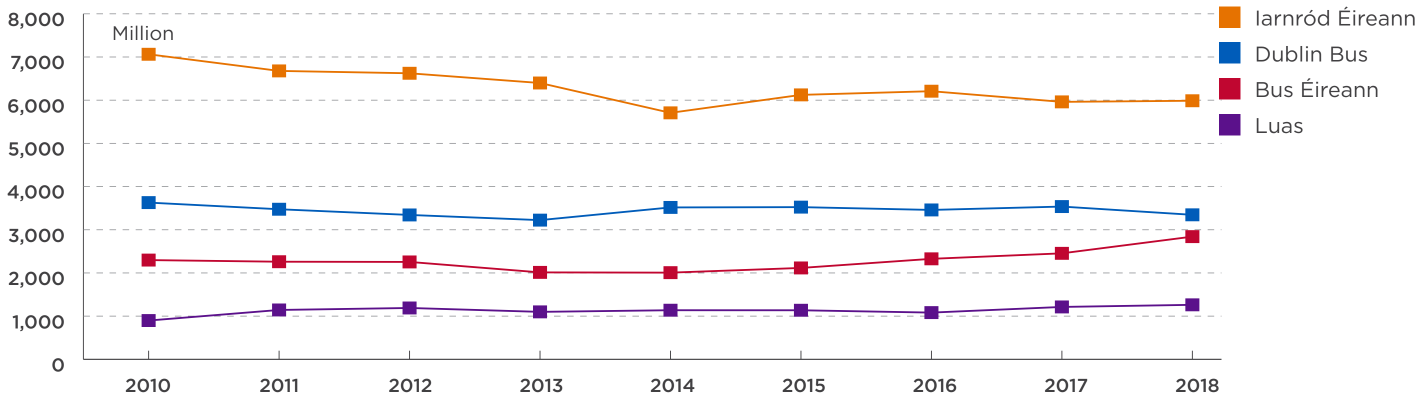
*See note under Table 3A above
**See note under Table 3B above

Table 3D: Percentage Change of Annual Operated Vehicle Seat Kilometres (millions)

Year/Operator	Dublin Bus	Bus Éireann	Iarnród Éireann	Luas
2011	-4.3%	-1.6%	-5.5%	27.2%
2012	-3.8%	-0.2%	-0.8%	4.0%
2013	-3.6%	-3.8%*	-3.4%	-7.6%
2014	-3.3%*	-0.3%	-10.8%	3.5%
2015	0.2%	5.4%	7.3%	-0.1%
2016	-1.8%	10.0%	1.4%	-4.7%
2017	2.2%	5.5%	-4.0%	12.1%
2018	-5.4%**	15.8%	0.4%	11.0%

*See note under Table 3A above
**See note under Table 3B above

Figure 3.1: Annual Vehicle Seat Kilometres Operated 2010 -2018



4

Passenger Revenues

Passenger revenues for Dublin Bus, Bus Éireann, Iarnród Éireann and Luas are made up of cash fare revenue, Leap revenue, and prepaid ticket sales (including Taxsaver tickets), as well as the free travel grant from the Department of Employment Affairs and Social Protection (DEASP). LocalLink revenues include cash and Leap fare revenue, prepaid ticket sales, free travel grant and contracted revenue which is revenue paid to LocalLink from agencies such as the Health Service Executive (HSE) or from community groups for the provision of specific bus services.

The passenger revenues reported in this chapter (Table 4A) do not include the annual Public Service Obligation subsidy, which is outlined in Chapter 7. Passenger revenue only relates to contracted PSO services and does not include commercial sources (e.g. the Dublin Bus Airlink airport service or Bus Éireann Expressway services).

Passenger revenue growth is as a result of increased fares and/or increased passenger journeys. Significant fares increases were approved by the Authority for 2012 and 2013 to compensate for loss in PSO subsidy and these fare increases enabled the growth in passenger revenues despite passenger journeys falling slightly during this period. In 2014, 2015 and 2016 average fare increases were moderate and it was the growth in passenger journeys on the transport services which was the main contributor to passenger revenue growth.

Annual fare adjustments made in December 2017 resulted in a revenue increase of less than 1% of overall fare income. In 2018, the driver of fare revenue growth continues to be growth in passenger journeys as service levels increase. An increase of 6.4% in passenger journeys resulted in growth of 7.9% in passenger revenues. As the use of Leap e-purse to pay for single journeys on the bus and rail network grows it has the effect of moderating passenger revenue growth due to the significant discount available. The Free Travel Grant from the DEASP has not increased since 2010 despite the increase in free travel passengers and this also has a moderating effect on the growth in passenger revenues.

Since 2010 the average growth rate in operators' passenger revenues is about 5%. In the earlier years the growth was driven by fare increases while in the past few years it is driven by growth in passenger journeys.

Bus Éireann passenger journeys have rebounded from a decline in 2017 owing to industrial action, with increases in excess of 13% in 2018. Passenger revenues have in turn surpassed previous highs, with an increase of 8.3% resulting in a revenue total of €87.05 million for the year. This is despite the full roll out of leap-enabled machines across the network, but does reflect strong passenger growth, particularly in the regional cities and on stage carriage services.

Increases in Dublin Bus passenger numbers have eased in 2018 from the previous year, with overall growth of 2.8%. Passenger revenues have however been cushioned by fare adjustments within the Greater Dublin Area, with a 3.6% increase in 2018. The latest figures are also in the context of a portion of services transferring to Go Ahead, whose passenger revenue of €2.2 million since commencement of operations has further contributed to the growth in the Greater Dublin Area in 2018.

Luas have seen slightly higher fare increases in recent years compared to other operators. Passenger revenues also remained flat in 2016, but this was due the closure of the red Luas line from Jervis to the Point for six weeks to facilitate Luas CrossCity works and to 12 days of industrial action when no services operated. However, a combination of growth in passenger journeys, and moderate fare increases, resulted in strong revenue growth in 2017. This upward trend has continued in 2018 with passenger revenues exceeding €73 million, equating to an 18.4% year on year increase, which has to a large degree been supported by the opening of Luas Cross City.

LocalLink figures include contracted revenue which has resulted in increased passenger revenues each year since 2011. Contracted revenue is revenue paid to LocalLink from agencies such as the HSE or from community groups for the provision of specific bus services. It is this contracted revenue which is supporting the strong growth in LocalLink passenger revenue from 2012 onwards. The introduction of a number of high frequency services across the LocalLink network in 2017 and 2018 has now shown to have resulted in a significant upturn in passenger revenues, as demand for these rural services continues to expand.

Table 4A: Annual Passenger Revenue (€ millions)

Year / Operator	Dublin Bus	Bus Éireann	Iarnród Éireann	Luas	LocalLink*	Other PSO Services	Total
2010	€159.40	€63.97	€162.59	€40.43	-		€426.39
2011	€158.86	€62.66	€156.65	€43.66	€3.07		€424.90
2012	€172.13	€66.14	€157.91	€46.44	€4.00		€446.62
2013	€184.85	€69.51	€166.89	€47.89	€4.66		€473.80
2014	€194.43	€73.85	€174.52	€51.16	€5.19		€499.15
2015	€204.40	€77.79	€184.18	€54.37	€5.95		€526.69
2016	€211.71	€84.12	€193.67	€54.83	€6.88		€551.21
2017	€224.69	€80.35	€204.94	€61.99	€7.33		€579.29
2018	€232.69	€87.05	€220.91	€73.38	€9.20	€2.24	€625.47

*Figures include cash fares, plus contracted revenue collected.

Table 4B: Percentage Change in Annual Passenger Revenue

Year / Operator	Dublin Bus	Bus Éireann	Iarnród Éireann	Luas	LocalLink	Other PSO Services	Total
2011	-0.3%	-2.0%	-3.7%	8.0%	-		
2012	8.4%	5.6%	0.8%	6.4%	30.3%		5.1%
2013	7.4%	5.1%	5.7%	3.1%	16.5%		6.1%
2014	5.2%	6.2%	4.6%	6.8%	11.4%		5.3%
2015	5.1%	5.3%	5.5%	6.3%	14.6%		5.5%
2016	3.6%	8.1%	5.2%	0.8%	15.6%		4.7%
2017	6.1%	-4.5%	5.8%	13.1%	6.5%		5.1%
2018	3.6%	8.3%	7.8%	18.4%	25.6%	N/A	7.9%

Figure 4.1: Annual Passenger Revenues 2010 - 2018

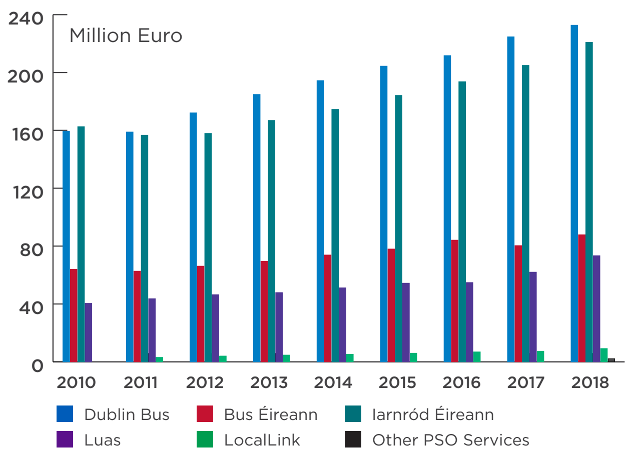


Figure 4.1 shows the annual passenger revenues for each of the operators. If this chart is compared with Figure 1.1 which showed passenger journeys by operator it can be noted that while Dublin Bus carries almost three times the number of passenger journeys compared to Iarnród Éireann their passenger revenues are quite similar. This is because Iarnród Éireann carries some of their passengers long distances and the fare charged is far greater than the fare charged by Dublin Bus, who in general carries their passengers a much shorter distance. Similarly with Bus Éireann and Luas, while Luas carried 6.5 million more passenger journeys than Bus Éireann their revenues are only about three quarters of the Bus Éireann revenue. All Luas journeys are relatively short and therefore have low fares while Bus Éireann carries some of their passengers long journeys with much higher fares.

5

Passenger Revenues by Region

Table 5A, 5B and Figure 5.1 shows the passenger revenue from 2013 to 2018 for the Dublin region and the growth over the past five years. Dublin Bus and Luas operate all their passenger services in the Dublin region while Iarnród Éireann DART and commuter services along with Bus Éireann Dublin commuter routes are included in the Dublin region here. Passenger revenues from Iarnród Éireann are not broken down by Dublin region and therefore the figures used in tables 5A and 5B are estimates only.

Total passenger revenues in this region have been growing steadily over the past five years with Luas passenger revenue showing strongest growth, particularly in the last two years, followed closely by Iarnród Éireann. The total growth in passenger revenues shown in table 5B of almost 30% is on a par with the growth in passenger journeys of 27%, in Table 2B, during the same period. This reflects the strong relationship between passenger revenues and passenger journeys. It also reflects the expansion of services across all Operators and the increasing shift towards public transport, combined with low fare increases over the past few years and the movement from cash fares to cheaper Leap fares.

Figure 5.1 clearly shows the dominance of Dublin Bus in the Dublin region with revenues greater than the other three operators combined, with Go Ahead contributing less than 0.1% of this total.

Table 5A: Dublin Region Annual Passenger Revenues (€ million)

Year/ Operator	Dublin Bus & Go Ahead	Bus Éireann Dublin Commuter	Iarnród Éireann DART & Dublin Commuter*	Luas	Total
2013	€184.85	€26.89	€64.20	€47.89	€323.83
2014	€194.43	€28.12	€68.78	€51.16	€342.49
2015	€204.40	€29.61	€73.58	€54.37	€361.96
2016	€211.71	€31.47	€80.94	€54.83	€378.95
2017	€224.69	€29.19	€85.21	€61.99	€401.07
2018	€234.52	€27.64	€90.69	€73.38	€426.24

*Estimated

Table 5B: Percentage Growth of Dublin Region Annual Passenger Revenues 2013 to 2018

Year/ Operator	Dublin Bus & Go Ahead	Bus Éireann Dublin Commuter	Iarnród Éireann DART & Dublin Commuter*	Luas	Total Passenger Revenues
2013 to 2018	25.5%	2.7%	38.5%	49.8%	29.9%

*Estimated

Figure 5.1: Dublin Region Annual Passenger Revenues

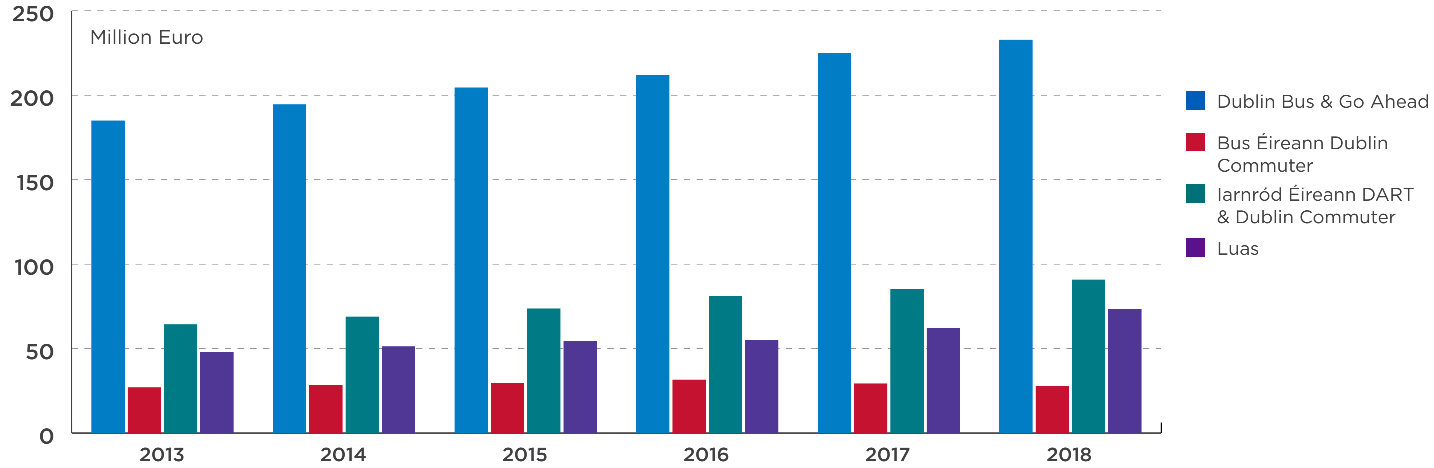


Table 5C and 5D show the breakdown of passenger revenues in selected areas outside the Dublin region. Most of the areas are served by Bus Éireann with Iarnród Éireann Intercity also providing services. All LocalLink services are included here even though a small number of their services operate in the Dublin region. Passenger revenues from all areas outside the Dublin region are approximately 40% of Dublin region passenger revenues. This is despite the fact that according to the CSO about 60% of the population of Ireland lives outside the greater Dublin area indicating a lower level of public transport usage throughout the country compared to Dublin.

Total passenger revenue grew in 2018 by 7.9%, with notable return to growth from Bus Éireann following industrial action in 2017. Revenue gains on Luas can also be attributed to a large extent by the opening of Luas CrossCity in December 2017, with significant increases in patronage. LocalLink revenue has grown strongly since 2014 through the provision of additional services, contributing towards growth of 25.6% in 2018. Fare increases have been minimal in recent years on all these services.

Passenger revenue growth outside Dublin was just under 30% between 2013 and 2018, which is on a par with that seen in Dublin itself. This reflects improved revenue results on Bus Éireann city services in Cork, Galway and Limerick. This reflects the work done by the Authority in association with Bus Éireann in the reconfiguration of bus services to reflect the changing transport needs of the cities. Future Revenue growth may however be mitigated somewhat as passengers on city and stage carriage services migrate to Leap in greater numbers.

Passenger Revenues on Bus Éireann services in Waterford and on Stage Carriage services returned to positive territory in 2018 as a result of enhanced service provision, unaffected by previous industrial action.

Table 5C: Annual Passenger Revenues Outside Dublin Region (€ million)

Year/ Operator	Bus Éireann Cork City	Bus Éireann Galway City	Bus Éireann Limerick City	Bus Éireann Waterford City	Bus Éireann Stage Carriage	Iarnród Éireann Intercity	LocalLink	Total
2013	€16.05	€5.08	€3.58	€0.97	€16.94	€100.55	€4.66	€131.78
2014	€18.20	€5.76	€3.90	€1.00	€16.89	€103.18	€5.19	€135.92
2015	€20.44	€5.94	€4.03	€0.98	€16.78	€107.83	€5.95	€141.51
2016	€22.71	€6.57	€4.34	€1.05	€17.99	€109.69	€6.88	€146.51
2017	€21.73	€6.69	€4.78	€0.96	€17.00	€116.37	€7.33	€153.12
2018	€22.61	€7.54	€5.43	€1.10	€21.16	€126.72	€9.20	€171.14

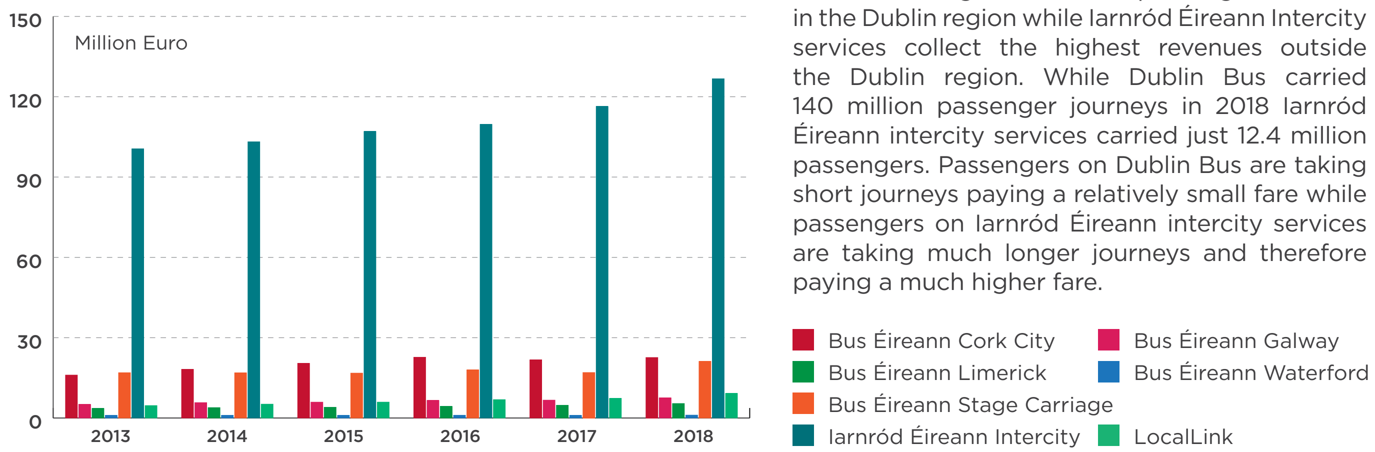
Table 5D: Percentage Change of Passenger Revenues Outside Dublin Region 2013 to 2018

Year/ Operator	Bus Éireann Cork City	Bus Éireann Galway City	Bus Éireann Limerick City	Bus Éireann Waterford City	Bus Éireann Stage Carriage	Iarnród Éireann Intercity	LocalLink	Total
2013 to 2018	40.9%	48.4%	51.6%	12.9%	24.9%	26.0%	97.4%	29.9%

This growth in passenger revenues is due to both fare increases and strong passenger journey growth in these cities as outlined in tables 2D and 2F.

Passenger revenues on Iarnród Éireann intercity services have grown by 26% which is similar to passenger journey growth over the same period. This indicates that most of the growth in revenues came from additional passengers rather than an increase in fares. Fare increases on the Iarnród Éireann intercity network have been considerably less than on other public transport services over the past number of years. The low fare increases combined with cheaper web fares has kept revenue growth in line with passenger journey growth.

Figure 5.2: Annual Passenger Revenues Outside Dublin Region



It is clear from Figures 5.1 and 5.2 that Dublin Bus collects the largest amount of passenger revenues in the Dublin region while Iarnród Éireann Intercity services collect the highest revenues outside the Dublin region. While Dublin Bus carried 140 million passenger journeys in 2018 Iarnród Éireann intercity services carried just 12.4 million passengers. Passengers on Dublin Bus are taking short journeys paying a relatively small fare while passengers on Iarnród Éireann intercity services are taking much longer journeys and therefore paying a much higher fare.

Figure 5.3: Passenger Revenue Change by Segment 2013 to 2018

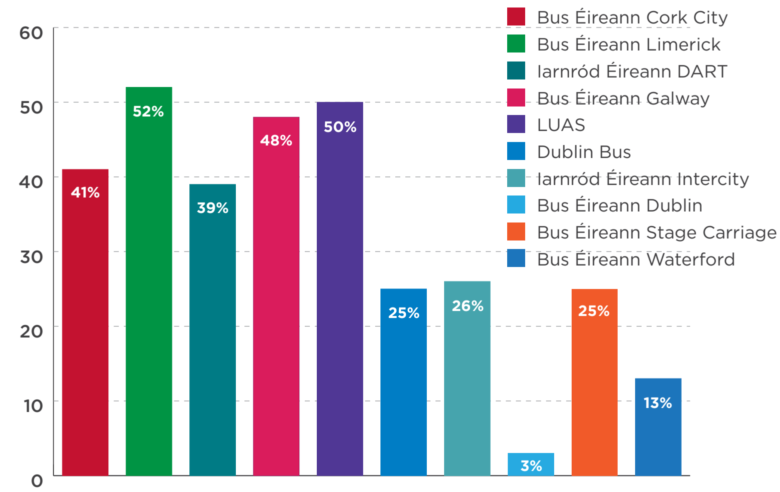


Figure 5.3 shows the passenger revenue change by segment between 2013 and 2018. This table is broadly similar to Figure 2.4 which showed the change in passenger journeys over the same period. The growth in passenger revenue is slightly stronger than passenger journeys and this is accounted for by increases in fares over this period. Financial data on Iarnród Éireann Cork commuter is not readily available and has been excluded from Figure 5.3.

Bus Éireann city services in Cork, Limerick and Galway along with Luas and Iarnród Éireann services in Dublin are showing strongest passenger revenue growth. Bus Éireann Stage Carriage and Dublin Bus services have performed well over the period, however Bus Éireann Waterford City services are showing lesser growth in revenues, and Dublin Commuter services showing marginal increases only.

6

Free Travel Scheme Revenue

The Department of Employment Affairs and Social Protection (DEASP) 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, certain other persons in receipt of a Disability Allowance or Invalidity Pension, and spouses/partners of those 66 and over.

Free travel under the Free Travel Scheme is available on most transport services including bus, train, tram and some ferry services. It is available on both PSO services and on a large number of commercial services. The DEASP spends in the region of €76m on the scheme each year. Funding for the scheme for PSO operators has remained stable since 2010 and has not responded to the significant increase in passenger journeys undertaken by Free Travel Scheme passengers and the significant growth in the population of those over 66 years of age.

Table 6A shows annual DEASP payments for the Free Travel Scheme. The CIÉ group which includes Dublin Bus and Bus Éireann PSO services and Iarnród Éireann receive a block grant each year and the CIÉ group divide the grant among the various operations. The differences in table 6A from one year to the next reflect timing differences in most cases, although in some cases deductions have been made from the payments when services did not operate due to industrial action.

The funding shown in table 6A is included in the passenger revenues in Chapter 4 and 5.

Table 6A: DEASP Revenue for Free Travel Scheme by Operator (€ million)

Year	Dublin Bus PSO services	Bus Éireann PSO services	Iarnród Éireann	Luas	LocalLink
2010	€20.59	€12.50	€14.60	€2.96	-
2011	€20.59	€12.30	€14.60	€4.13	-
2012	€20.59	€12.10	€14.61	€3.79	€1.50
2013	€20.45	€12.07	€14.60	€3.40	€1.50
2014	€20.59	€11.98	€14.50	€3.91	€1.50
2015	€20.59	€12.04	€14.63	€3.91	€1.50
2016	€20.13	€13.29	€14.60	€3.91	€1.50
2017	€20.59	€12.60	€14.60	€3.91	€1.50
2018	€20.39	€12.79	€14.60	€3.91	€1.50

Over the past eight years the number of people aged 66 years and over has increased by about 3% to 3.5% each year. This increase is reflected in the numbers availing of the Free Travel Scheme and Table 6B highlights that.

Since 2010 the number of passenger journeys taken under the Free Travel Scheme has increased by 30% - as shown in table 6c.

Table 6B: DEASP Free Travel Scheme Passenger Journeys (million)

Year	Dublin Bus PSO services	Bus Éireann PSO services	Iarnród Éireann	Luas	LocalLink	Total
2010	22.80	7.90	3.94	2.22	0.88	37.74
2011	22.80	7.95	4.18	3.14	0.93	39.01
2012	23.78	8.12	4.53	3.09	0.88	40.41
2013	23.07	8.84	4.53	3.47	0.83	40.74
2014	23.80	9.30	4.64	3.60	0.80	42.14
2015	23.97	9.22	4.62	3.86	0.77	42.44
2016	25.58	9.76	4.76	3.53	0.93	44.56
2017	28.11	9.80	4.87	3.67	1.11	47.55
2018	28.39	10.71	4.95	4.01	1.02	49.08

Table 6C: Change in DEASP Free Travel Scheme Passenger Journeys 2010 to 2018

Year	Dublin Bus PSO services	Bus Éireann PSO services	Iarnród Éireann	Luas	LocalLink	Total
2010 to 2018	24.5%	35.6%	25.7%	80.8%	15.9%	30.1%

7

Public Service Obligation (PSO) Subsidy

Each year funding is provided for socially necessary but commercially unviable bus and rail services in Ireland. The Public Service Obligation (PSO) payments in respect of the bus and rail transport contracts since 2010 are set out in Table 7A. The operators provide these PSO services under contract to the National Transport Authority. The provision of PSO payments is governed in detail by both EU and Irish legislation. Regulation 1370/2007 is the EU wide legal framework governing the regulation of public bus and rail passenger services and sets out the methodology in terms of awarding contracts for service delivery and providing PSO compensation for the provision of such services. The funding of these PSO services is governed by public service contracts between the Authority and the relevant operator, subject to the level of exchequer funding available.

The bulk of PSO funding goes to the three main Operators namely Dublin Bus, Bus Éireann PSO services, and Iarnród Éireann. These companies were awarded public service contracts in 2009 with Dublin Bus and Bus Éireann for a period of 5 years and Iarnród Éireann for a period of 10 years. The contracts with the two bus companies were renewed in December 2014. These direct award public service contracts are operated on a net cost basis - the operators retain passenger revenues and also receive PSO subsidy payments.

A small number of additional public transport services are provided by other operators under a gross cost contract model. This is where the service provided results from a public tender competition. The cost of providing the service is fixed based on the tender and all fare revenue is transferred to the Authority. In 2017 there were three operators providing services following public tender competitions M&A Coaches Ltd., Andrew Wharton Coach Hire and Bernard Kavanagh & Sons Ltd. A fourth Operator, J.J. Kavanagh & Sons, was also successful in a tender competition to operate a new service between Naas and Blanchardstown in March 2018.

The not-for-profit companies that provide services under the LocalLink Programme are grant-aided by the Government via the Authority. Significant change in the delivery structure for these services took place over the past few years. There are now 15 Transport Coordination Units (TCU) with the role of managing the programme at local level known under the brand name LocalLink.

Table 7A: PSO Subsidy Payments (€ millions)

Year	Iarnród Éireann	Dublin Bus	Bus Éireann	Locallink	Other Operators	Total
2010	€155.14	€75.79	€45.22	€11.00	-	€287.15
2011	€148.69	€73.04	€43.41	€10.62	-	€275.76
2012	€166.42*	€74.77*	€36.87	€9.77	-	€287.83
2013	€127.03	€64.54	€34.36	€9.63	€0.03	€235.59
2014	€117.37	€60.04	€34.39*	€10.10*	€0.43	€222.33
2015	€98.11**	€57.70	€33.71*	€10.70*	€1.02	€201.24
2016	€133.06	€59.56	€40.84	€11.86	€0.36	€245.67
2017	€146.98	€53.96	€52.21	€13.70	€7.02***	€273.92
2018	€141.25	€47.47	€54.31	€18.60	€6.91****	€268.54

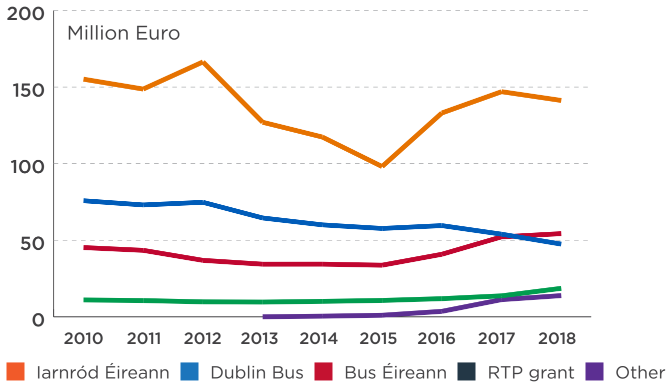
*Additional funds included in the above figures were made available to Iarnród Éireann in 2012, Dublin Bus in 2012, to Bus Éireann in 2014 & 2015 and to Locallink in 2014 and 2015.
**Iarnród Éireann received additional exchequer funds for their Infrastructure Management business which partly compensated them for a reduction in PSO subsidy payments to their Railway Undertaking business which receives the PSO subsidy payments.
***The payment in 2017 includes payment for all Gross Cost Operators, and a once off payment of €6.68m to TII for Luas CrossCity mobilisation costs.
****The payment in 2018 includes payments to all Gross Cost Operators.

Table 7B: Percentage Change in PSO Subsidy Payments Each Year

Year	Iarnród Éireann	Dublin Bus	Bus Éireann	RTP grant	Other Operators and Support costs	Total
2011	-4.2%	-3.6%	-4.0%	-3.5%	-	-4.0%
2012	11.9%	2.4%	-15.1%	-8.0%	-	4.4%
2013	-23.7%	-13.7%	-6.8%	-1.4%	-	-18.1%
2014	-7.6%	-7.0%	0.1%	4.9%	1320.0%	-5.6%
2015	-16.4%	-3.9%	-2.0%	5.9%	139.8%	-9.5%
2016	35.6%	3.2%	21.1%	10.8%	249.6%	23.7%
2017	10.5%	-9.4%	27.8%	15.9%	222.0%	11.8%
2018	-3.9%	-12.0%	4.0%	35.3%	23.2%	-1.0%

Table 7B shows that the PSO payments decreased by 1% in 2018, following increases of almost 24% in 2016 and 12% in 2017. Despite recent increases, the payment in 2018 is still €11m less than the 2010 payment. As was the case in 2017, the Dublin Bus payment dropped by 12% or €6.4m in 2018. This was due to the growth in passenger journeys, associated growth in passenger revenues, and the transfer of services to Go Ahead. Under EU regulation 1370/2007 operators directly awarded public transport contracts are allowed to earn reasonable profit but any higher level of profit is deducted from their annual subsidy payments.

Figure 7.1: PSO Payments 2010 to 2018

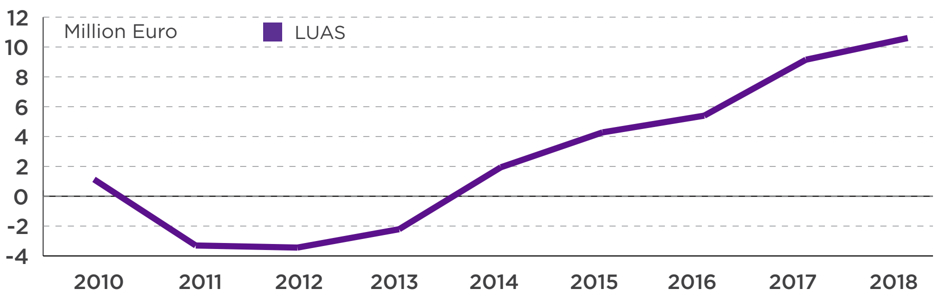


Luas experienced deficits between revenue and operating costs between 2011 and 2013. In 2014 Luas operations returned a surplus of €1.94m and this has increased each of the last four years to €10.6m in 2018 as shown in Table 7C and Figure 7.2. Although Luas does not receive PSO funding from the Authority, the Authority has agreed to the balancing of any shortfalls from accumulated cash reserves (which in the past, were used to fund the maintenance of the Luas network along with the Authority's capital grant funds.) While Luas returned a surplus in 2018 on its operating activities it should be remembered that all capital works such as the rail lines and the trams are funded by the exchequer. In 2017 Luas received a once-off PSO grant of €6.68m towards Luas CrossCity mobilisation costs.

Table 7C: (Deficit) / Surplus on Luas Operation Activities Before Interest, Tax and Depreciation

Year	Luas (€ millions)
2010	€1.13
2011	(€3.30)
2012	(€3.44)
2013	(€2.21)
2014	€1.94
2015	€4.28
2016	€5.40
2017	€9.15
2018	€10.6

Figure 7.2: (Deficit)/Surplus On Luas Operation Activities, 2010 -2018



8

Total Number of Buses

The total number of buses that Dublin Bus and Bus Éireann own and/or maintain as part of their PSO services is outlined in Table 8A. Bus numbers shown are for Quarter 4 of the respective years. Bus numbers required by Dublin Bus and Bus Éireann have increased in recent years as passenger journey numbers have recovered and as a result of the establishment of steady state funding of replacement buses in the fleet. The Dublin Bus fleet has reduced marginally as a result of buses being allocated to some services which have recently transferred to Go Ahead. Both operators hire in additional buses to complement services on some routes but those buses are not included in the table.

Table 8A: Total Number of Buses

Year/Operator	Dublin Bus	Bus Éireann
Quarter 4 2010	1,023	400
Quarter 4 2011	940	460
Quarter 4 2012	914	443
Quarter 4 2013	907	453
Quarter 4 2014	919	453
Quarter 4 2015	943	475
Quarter 4 2016	967	517
Quarter4 2017	993	542
Quarter 4 2018	1127*	588

*This figure is inclusive of 140 buses allocated to Go Ahead Ireland

9

Age of Buses

The numbers in Table 9A reflect the average age of the bus fleets. It should be noted that the Dublin Bus figures may include a very small element of vehicles used for commercial purposes from 2010 to 2015. From 2016 onwards the average age refers to the Dublin Bus buses providing services included in the PSO Contract only.

For Bus Éireann the figures for 2010 refer to their PSO fleet, while between 2011 and 2016 the city fleet would be PSO only. Service Fleet includes stage carriage, Dublin commuter and some Expressway (Occasionally a vehicle could be used for PSO and commercial purposes and this can effect providing the average age of the PSO fleet only). In 2017 and 2018 the average age refers to the Bus Éireann buses, both city and services fleet, providing services included in the PSO contract only.

Table 9A: Average Age of Operator's Fleet

Year/Operator	Dublin Bus	Bus Éireann (City fleet)	Bus Éireann (Services fleet)
Quarter 4 2010	6.8 years	4.8 years (PSO fleet)	4.8 years (PSO fleet)
Quarter 4 2011	7.7 years	6.4 years (PSO fleet)	5.5 years
Quarter 4 2012	7.5 years	5.6 years (PSO fleet)	5.4 years
Quarter 4 2013	7.5 years	5.4 years (PSO fleet)	6.1 years
Quarter 4 2014	7.6 years	6.4 years (PSO fleet)	7.4 years
Quarter 4 2015	7.5 years	6.3 years (PSO fleet)	6.7 years
Quarter 4 2016	7.5 years	6.3 years (PSO fleet)	7.4 years
Quarter 4 2017	7.2 years	7.3 years (PSO fleet only)	
Quarter 4 2018	6.4* years	6.4 years (PSO fleet only)	

*This figure is inclusive of 140 buses allocated to Go Ahead Ireland

10

Rail Network Changes

The major changes that have occurred to both the Iarnród Éireann and Luas network over the last number of years are outlined in Tables 10A and 10B.

Table 10A: Iarnród Éireann Network Changes

Line extensions / re-openings/suspensions	Date
Cork Suburban Rail: Cork to Midleton - Opened	July 2009
Western Railway Corridor: Ennis to Athenry – Re-opened	March 2010
Rosslare to Waterford - Passenger Services Suspended	September 2010
Dublin Suburban Rail (Western Commuter): Clonsilla to M3 Parkway - Opened	September 2010
Kildare line services commence using the Phoenix Park Tunnel (peak only, Mon – Fri)	November 2016
Introduction of the new 10-minute DART timetable	September 2018

Table 10B: Luas Network Changes

Line extensions	Date
Red Line: Connolly to Docklands - Opened	December 2009
Green Line: Sandyford to Brides Glen - Opened	October 2010
Red Line: Belgard to Saggart - Opened	July 2011
Green Line: St Stephen's Green to Broombridge - Opened	December 2017

11

Operating Fleet with Wheelchair Accessibility

With low-floor wheelchair accessible buses, access to part or all of the passenger area is direct from the bus stop apron. This enables easier access for wheelchair users and those with limited mobility. Accessing low floor buses also requires that appropriate bus stop infrastructure, for instance kerbs of a specific height, are in place.

Dublin Bus and Bus Éireann's urban bus fleets are fully wheelchair accessible, as can be seen in Table 11A. These fleets comprise single and double decker buses appropriate for short commuter journeys, which are fitted with ramps to facilitate wheelchair users.

Bus Éireann's rural and intercity bus services primarily use coaches because those services involve much longer journeys for customers. As coaches are designed to have storage facilities close to ground level with seating above that, the only way of facilitating wheelchair users is by the use of a lift. The wheelchair lifts, which raise the passenger above the steps and into the coach corridor area, are not as readily suitable for wheelchair access as low-floor buses, but they still contribute towards the overall accessibility of the fleet. All new replacement buses purchased are accessible although in a small number of cases a non accessible bus may be cascaded from their commercial fleet. It is planned that over the next number of years all Bus Éireann buses which are not accessible will be removed from the fleet.

The Luas fleet of trams is all wheelchair accessible. While the Iarnród Éireann fleet of trains is fully wheelchair accessible, their trains require a ramp to enable boarding from the platform to the train carriages. A special portable ramp is used for this purpose and these are currently available at staffed stations and on board some trains or by calling Iarnród Éireann in advance of travel.

Table 11A: PSO Operating Fleet that are Wheelchair Accessible

Year/Operator	Dublin Bus	Bus Éireann (Regional City fleet)	Bus Éireann (Coach fleet)	Iarnród Éireann	Luas
2013	100%	100%	56%	100%	100%
2014	100%	100%	65%	100%	100%
2015	100%	100%	80%	100%	100%
2016	100%	100%	80%	100%	100%
2017	100%	100%	78%	100%	100%
2018	100%*	100%	78%	100%	100%

*This is inclusive of services transferred to Go Ahead

12

Gross Cost Contract Operators

In May 2013 following a competitive tender competition the Authority awarded the first gross cost public transport service contract for the provision of bus services to M&A Coaches Ltd. In a gross cost contract the cost of providing the service is fixed based on the tender and all fare revenue and Free Travel Scheme revenue from the DEASP is transferred to the Authority. The Authority sets the fares on these services as they do on all PSO funded services.

Since May 2013 M&A Coaches Ltd. operate route 828 return services between Cashel and Portlaoise. The service was retendered in 2016 when M&A Coaches Ltd. was again successful in the tender competition.

Route 975 between Cavan and Longford was tendered in 2014 and Whartons Travel Ltd. was chosen as the operator. When this route was retendered in 2016 there was an increase in the number of services per day from three to five in each direction. Andrew Wharton Coach Hire was successful in the 2016 competition for this route.

In 2015 Bernard Kavanagh & Sons Ltd and Bus Éireann were successful in a tender competition to operate different elements of route 817 which operates between Kilkenny and Dublin (return) via Castlecomer and from Naas to Castlecomer (return). These routes supplement the commercial bus service provided by JJ Kavanagh on Route 717 (Clonmel – Kilkenny – Dublin – Dublin Airport). The term of the contract for Route 817 (Castlecomer-Naas) operated by Bus Éireann expired in December 2016. However, following a review of the service, it was decided not to re-tender this service due to very low passenger numbers. The other element of the route between Kilkenny and Dublin via Castlecomer was retendered at that time and Bernard Kavanagh & Sons Ltd was again successful in winning the tender competition.

In March 2018, J.J. Kavanagh & Sons was successful in a tender competition to operate route 139 service between Naas and Blanchardstown. Data shown below is therefore reflective of operations between March and December 2018. No payment has been received from DEASP for Route 139.

The PSO subsidy paid to the operators of these four gross cost contracts amounts to just over 0.1% of the total PSO allocated to bus operators.

Figure 12.1 below shows fare revenue, Department of Employment Affairs and Social Protection (DEASP) free travel grant, and net subsidy as a % of gross tendered cost. Also outlined in figure 12.2 & Table 12A are passenger journeys, including the percentage of passenger journeys by free travel pass holder, the number of buses used along with their age and whether the buses are wheel chair accessible or not.

Note that there were no payments by the DEASP for the free travel scheme in 2013 or 2014 on these routes. Despite this, free travel pass holders were carried without paying a fare.

Figure 12.1

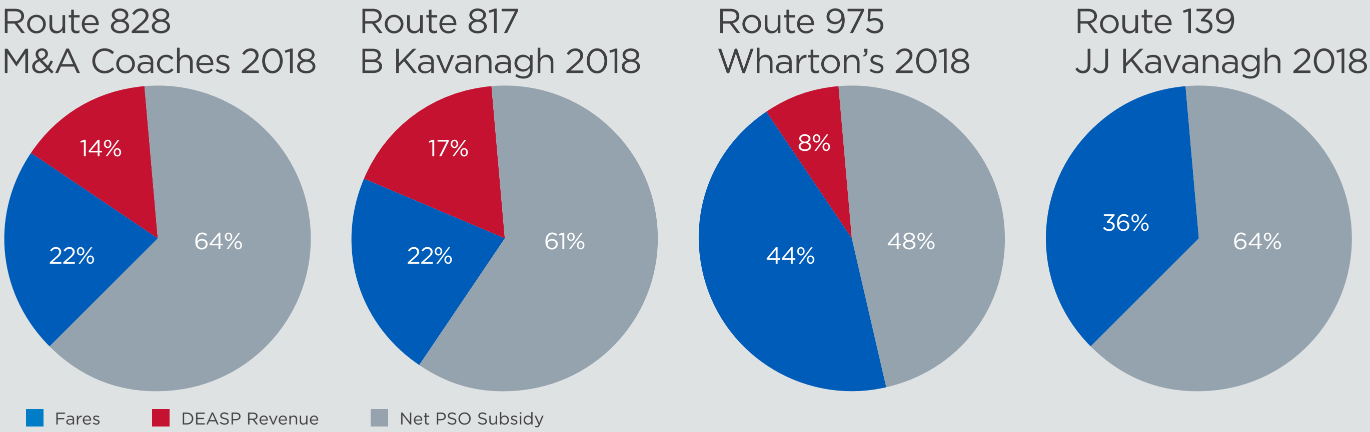


Figure 12.2: Gross Cost Contracts - Passenger Journeys

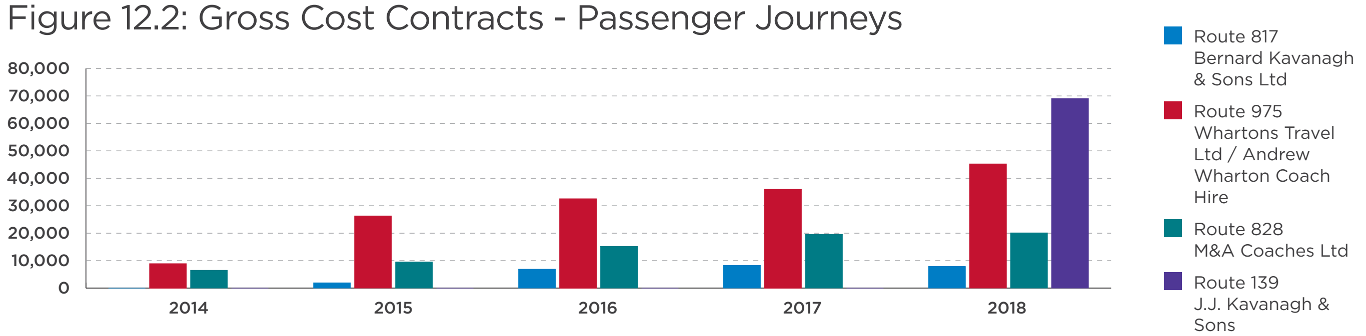


Table 12A: Details of Gross Cost Contract Routes

139	J.J. Kavanagh & Sons
	2018
Numbers of buses	3
Average age of buses	1
Buses wheelchair accessible	100%
% of free travel pass passenger journeys	13%

M&A Coaches Ltd	Route 828					
	Part Year 2013	2014	2015	2016	2017	2018
Numbers of buses	2	2	2	2	3	2
Average age of buses	6.5	7.5	8.5	9.5	9.5	11.5
Buses wheelchair accessible	50%	50%	50%	50%	33%	50%
Percentage of Free Travel Pass passenger journeys	N/a	N/a	49%	42%	62%	63%

	Route 975				
	Part Year 2014	2015	2016	2017	2018
Numbers of buses	1	1	2	2	2
Average age of buses	8	9	10	8.5	9
Buses wheelchair accessible	100%	100%	100%	100%	100%
Percentage of Free Travel Pass passenger journeys	N/a	40%	40%	37%	37%

Route 817	Bernard Kavanagh & Sons Ltd				Bus Éireann (Gross Cost Contract)	
	Part Year 2015	2016	2017	2018	Part Year 2015	2016
Numbers of buses	1	1	1	1	1	1
Average age of buses	9	10	2	3	9	10
Buses wheelchair accessible	100%	100%	100%	100%	0%	0%
Percentage of Free Travel Pass passenger	65%	64%	56%	54	42%	44%

Údarás Náisiúnta Iompair
National Transport Authority

For Further Information:

Media enquiries:
Dermot O'Gara
T: +353 (0)1 8798346

Statistical enquiries:
Tim Hall
T: +353 (0)1 8815597

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