Statistical Bulletin: 01/ 2022
September 2022

Údarás Náisiúnta Iompair
National Transport Authority

Commercial Bus Services

in Ireland (Overview of 2021)

Bulletin Topics:

- Overview of Commercial Bus Services in 2021
- Total Number of Passenger Journeys
- Scheduled Vehicle Kilometres
- Commercial Bus Services Revenue and Ticketing
- Commercial Operator Fleet Size

Introduction

Introduction to the Commercial Bus Services in Ireland Statistical Bulletin

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

An Abridged Bulletin for 2021

Due to the devastating impact of the COVID-19 crisis on the public transport market, this bulletin is an abridged version of the usual annual bulletin. It highlights the differences between 2019, the last full year of normal operations, and the years 2020 and 2021. Comparisons are also drawn between 2013, the first year data was collected across the entire State, and 2021.

Note for 2021 figures

Some licence holders have updated their previously submitted data. This bulletin represents the most up to date information.

What are the Regular Public Bus Passenger Services covered in this Statistical Bulletin

Licensed public bus passenger services are often called "commercial" bus services because they are usually operated without any public subsidy from the Authority. This was changed and temporary funding was made available to regular commercial bus service operators in 2020 and 2021 as they were determined by the Authority as being economically necessary to continue through the COVID-19 pandemic. These commercial bus services are individually licensed by the Authority. Some commercial bus services also receive payments from the Department of 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 are 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 international law and were travelling to, from, or through Northern Ireland and this State are also included in the bulletin. References to commercial bus services therefore include services operating wholly within the State and bus services which cross the border into Northern Ireland.

The two principal contracted State funded bus operators, Bus Éireann and Dublin Bus, also provide licensed regular bus services. The figures for these services are included in this bulletin.

References to Greater Dublin Area ("GDA") services and Non-GDA ("Non-GDA") services

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

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. GDA and Non-GDA services include licensed and authorised services.

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

All of the Authority's Bulletins can be viewed and downloaded here: https://www.nationaltransport.ie/publications/

Authority Obligations in Relation to Commercially Sensitive Information

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

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

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

Licences Categories not included in this Statistical Bulletin
Certain categories of commercial public bus passenger service licence are not included in this bulletin. These are:

- Event and Venue licences, which cover public bus passenger services for concerts and other events;
- Specific Targeted licences, which cover public bus passenger services such as tours;
- 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 https://www.nationaltransport.ie/bus-licensing

Level of Data Collected
12 operators did not supply returns for commercial bus services provided in 2021. This represented 4% of all licences. The combined figures for these licences accounted for less than 0.3% of the overall totals for 2019 passenger journeys or scheduled kilometres. Due to the rounding used in this bulletin the figures have no statistical impact on percentages however, the actual figures would be higher than recorded.

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

Overview of Commercial Bus Services in 2021

There is a large variability and diversity in the scale, frequency, and type of commercial bus services provided by operators. Types of commercial bus services include 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.

There is no restriction to the number of services that may be provided by a single licence or the number of licences that a single operator may hold, once approved as licensed services by the Authority under the Public Transport Regulation Act, 2009 (as amended). A single licence may provide for a number of services, with current licences ranging from one service per month to numerous services per hour, using several vehicles with large passenger capacities. One bus 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.

Change in Travel during COVID-19

The public health measures introduced due to COVID-19 meant that both passenger demand and bus capacity were curtailed. As a result, many commercial bus operators ceased to provide services or reduced their service levels due to the financial losses that would be incurred by continuing to operate in full.

There are many areas where commercial bus operators provide most, and in some locations all, regular public bus services. Therefore, it was essential for both social and economic reasons that some bus services recommenced during the COVID-19 pandemic. In June 2020, the Government announced temporary funding supports for the licensed regular bus sector, in accordance with EU and national legislation to support economically necessary services that were determined as services of general economic interest or Public Service Obligation by the Authority on an emergency basis.

Due to this financial support, the impact of the COVID-19 crisis on the licensed regular bus sector was mitigated and many commercial services resumed in full or in part in July/ August 2020. The supports continued throughout 2021.

During the periods when capacity restrictions were in place on public transport, additional vehicles had to be deployed by operators. This was to ensure that capacity restrictions were adhered to and that passengers were able to board services. Therefore, some individual services were operated by two or three vehicles. As a result, while there was a large reduction in the total passenger journeys, there was not a corresponding consistent reduction in the kilometres operated or the vehicles utilised. For this reason operators were asked to provide the actual operated vehicle kilometres for each licence in both 2020 and 2021. The operated vehicle kilometres figure incorporates the additional kilometres provided when more than one vehicle was deployed. Capacity restrictions on vehicles decreased throughout 2021, and the number of vehicles used to provide the services decreased while at the same time the number of vehicle kilometres increased.

Nationally in 2021, the vehicle kilometres provided were at 85% of 2019 levels, whereas ticket revenue was at 45%. There was a capacity restriction of 25% in place at the start 2021. The gradual easing of restrictions saw a return to 100% capacity on bus services from the 1st of September 2021. However, the demand for travel still rendered many services commercially unviable to operate.

The devastating impact of the COVID-19 pandemic on commercial bus services is clearly illustrated in Figures A to E and Table A. From the outset COVID-19 brought about changes to travel demand, which continued to impact travel and travel patterns in 2021. This is especially evident in the different levels of change between revenue and passenger journeys from 2020 to 2021, also shown in Figures A to E and Table A. Operators provided various reasons for the difference between the revenue and passenger numbers, including increases in single journeys or one off journeys, honouring tickets sold in 2020, as well as higher levels of shorter local trips.

In 2021, travel on Non-GDA services increased 16.5%, significantly more than the 1% increase on GDA services. For the second year in a row, the share of all passenger trips on Non-GDA bus services increased. Further, in 2021 the share of Non-GDA travel of all passenger trips was at a level higher than any other year. This reversed the decline seen since 2014. See Figure D.

Figure A: Overview of Figures for Commercial Bus Services in 2021 and 2020 Compared to 2019

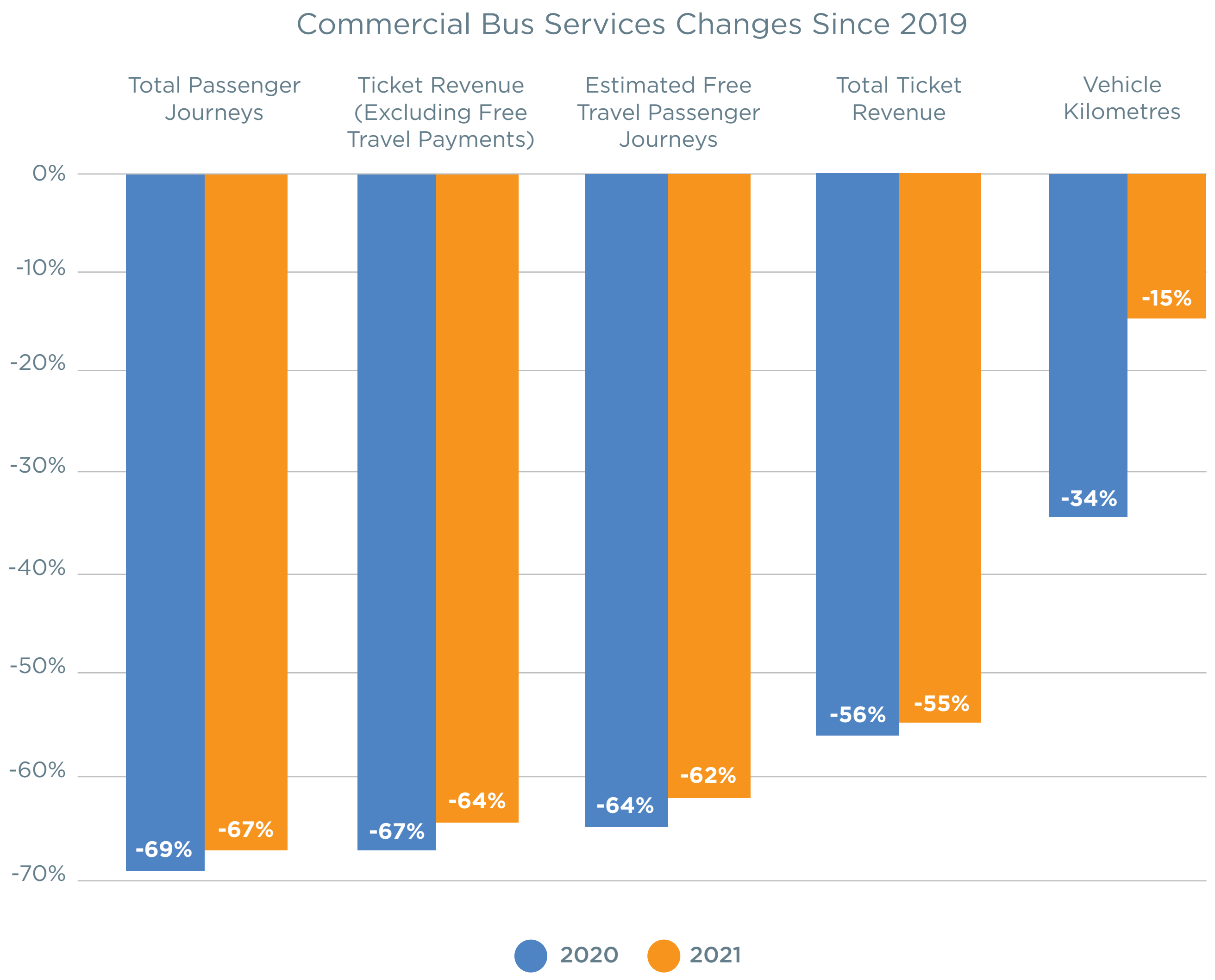


Figure B: Overview of Figures for Commercial Bus Services in 2021 Compared to 2020

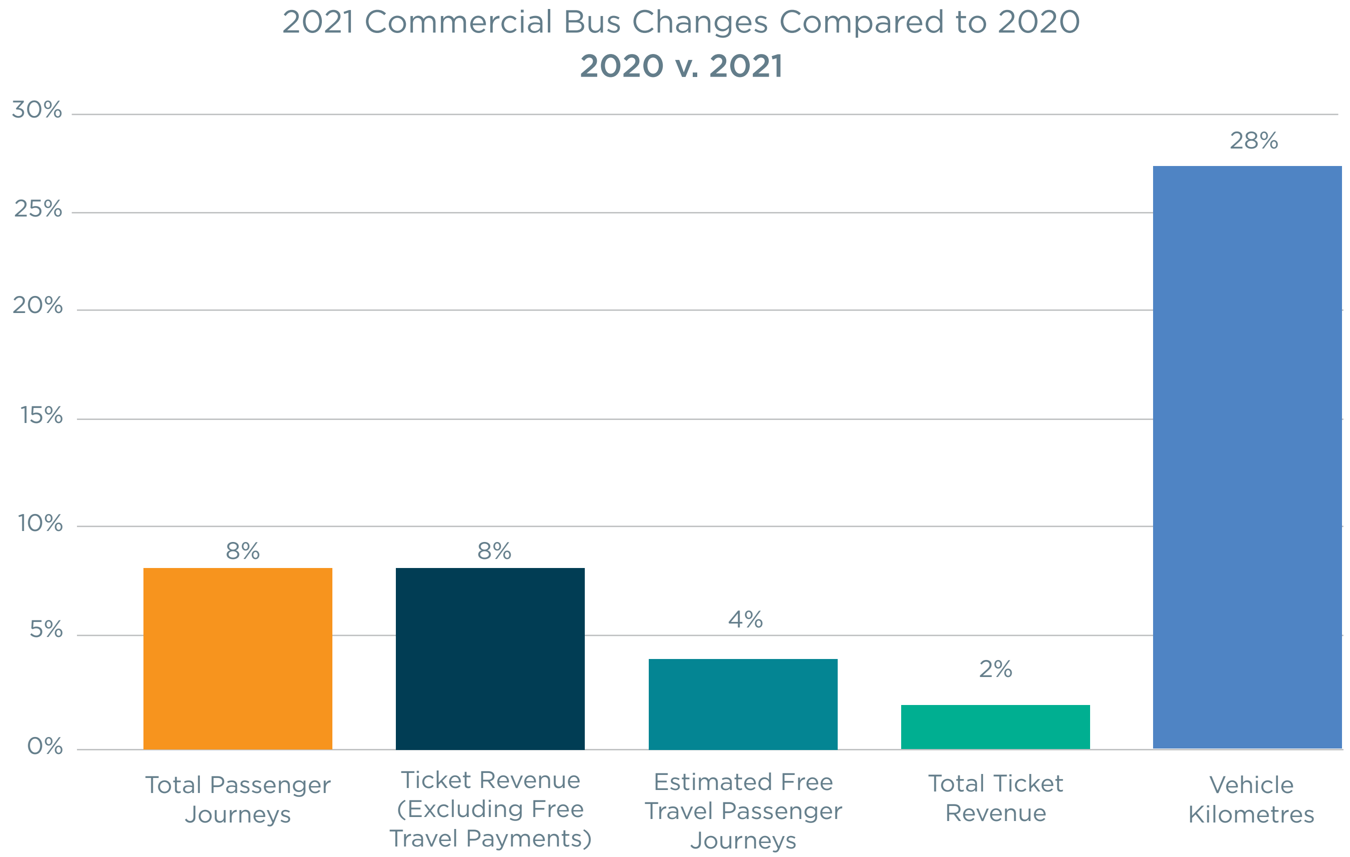
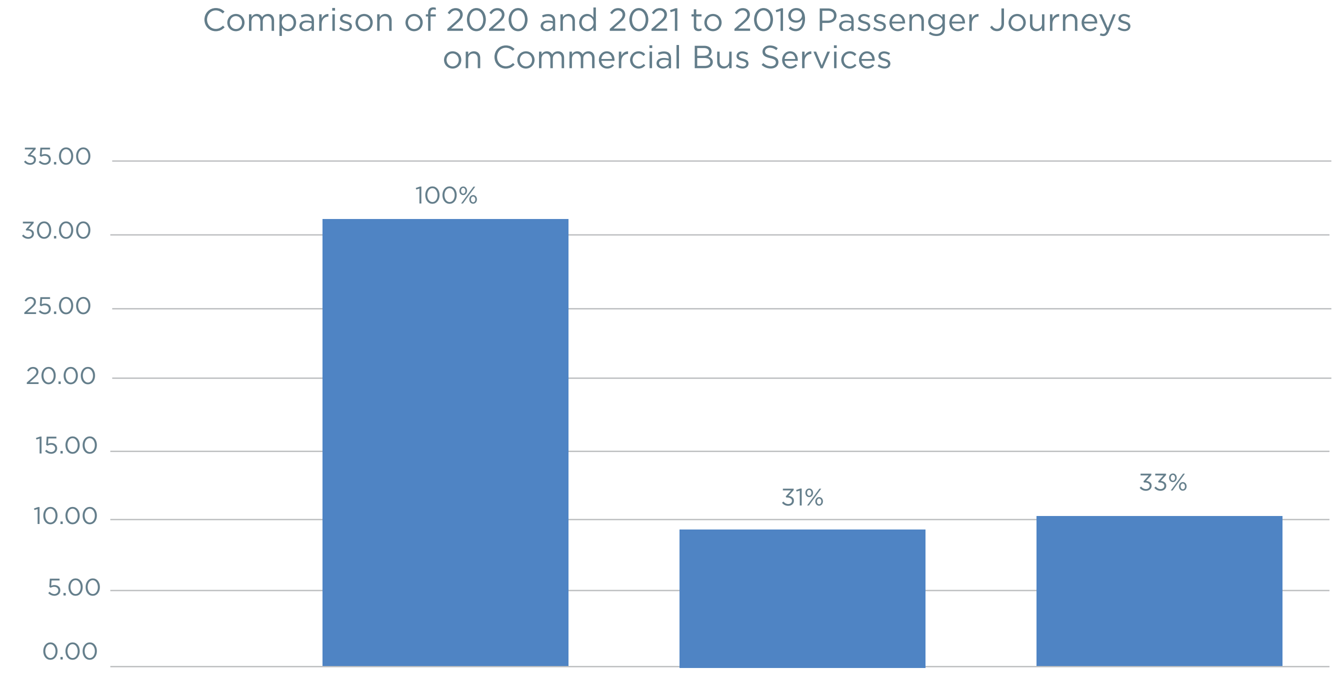


Figure C: Overview of Passenger Figures for Commercial Bus Services in 2021 and 2020 Compared to 2019



	2019	2020	2021
Total Passenger Journeys (in millions)	30.52	9.43	10.14

Figure D: Breakdown of Passenger Journeys for Commercial Bus Services 2013-2021

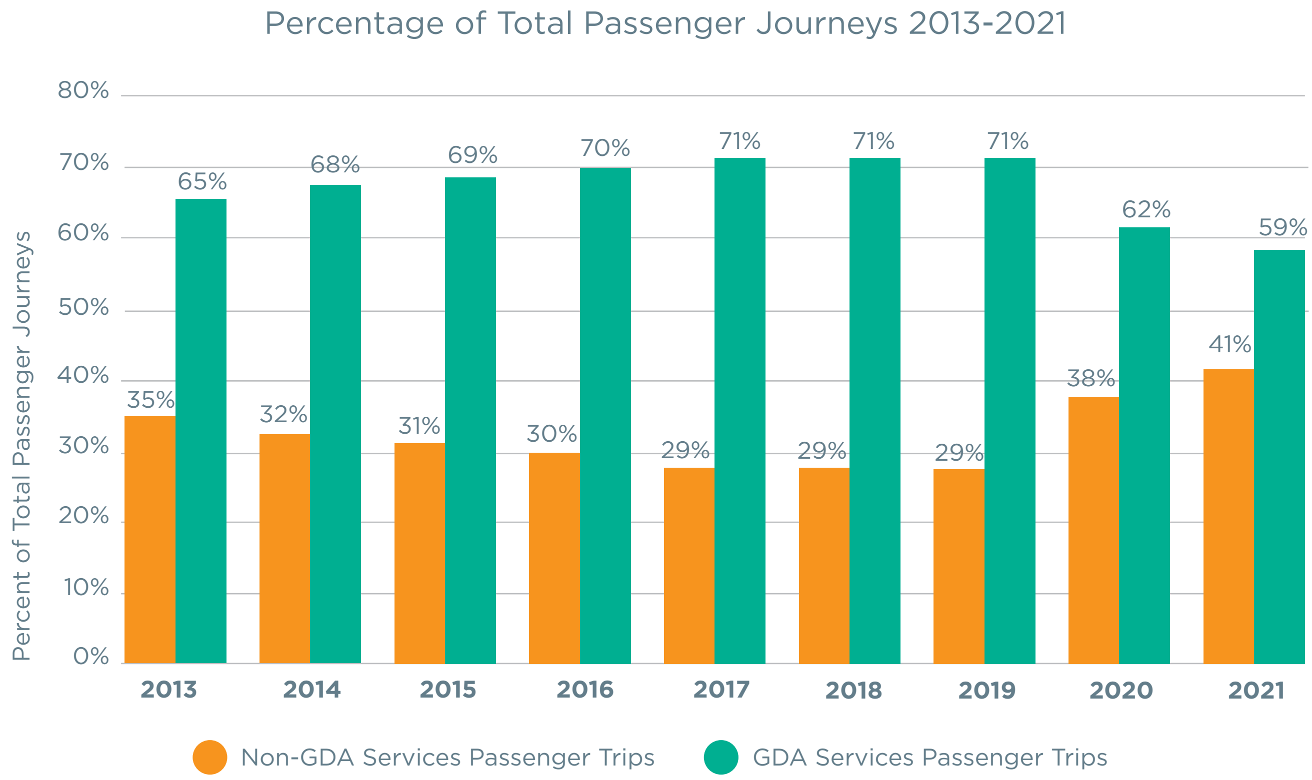
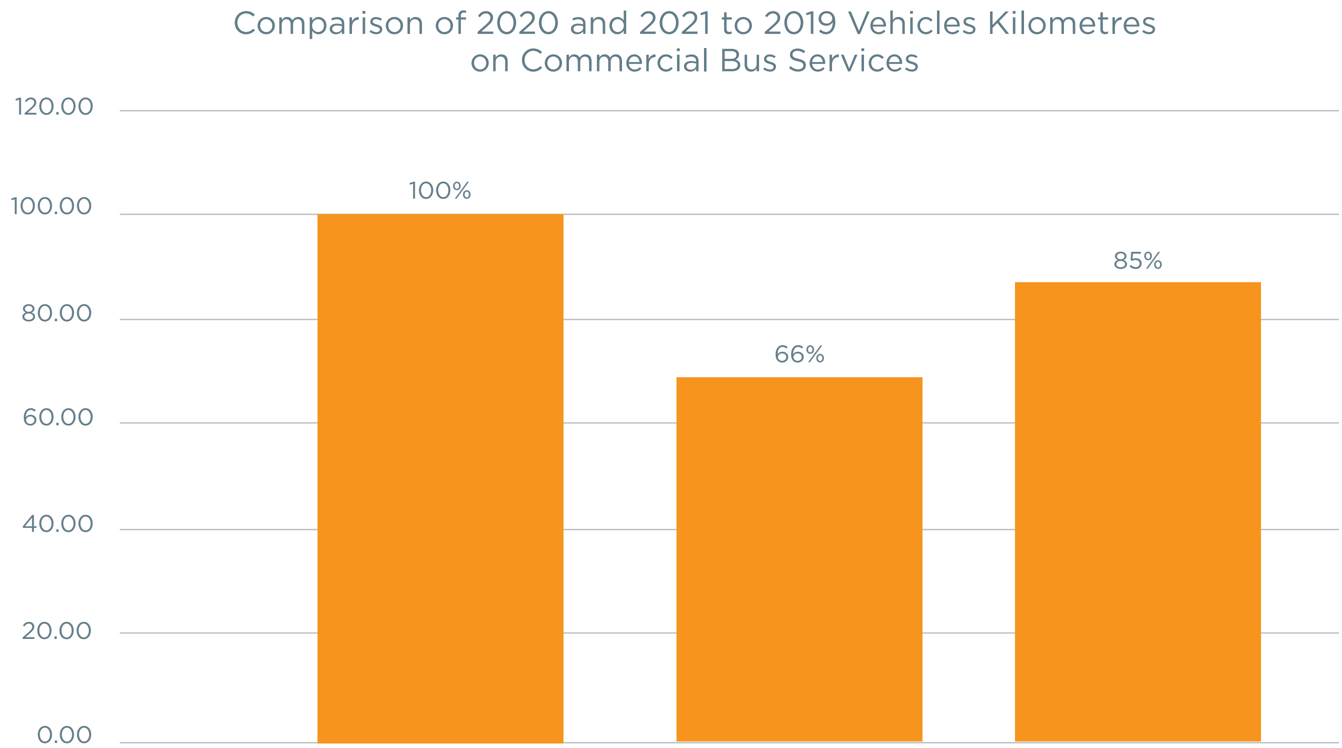


Figure E: Overview of Vehicle Kilometres Figures for Commercial Bus Services in 2021 and 2020 Compared to 2019



	2019	2020	2021
Vehicle Kilometres (in millions)	101.23	67.21	86.25

Table A: Comparison of 2021 Total Annual Passenger Journeys and Scheduled Vehicle Kilometres (in millions)

Year	Total Passenger Journeys	Scheduled Vehicle KM	Total Ticket Revenue
2013	20.1	80.1	€135.94
2019	30.5	101.2	€219.99
2021	10.14	86.25	€99.48
Change: 2013-2019	52%	26%	61%
Change: 2019-2021*	-67%	-15%	-55%
Change: 2013-2021*	-50%	8%	-27%

*Actual Vehicle Kilometres were returned for the years 2020 and 2021

1

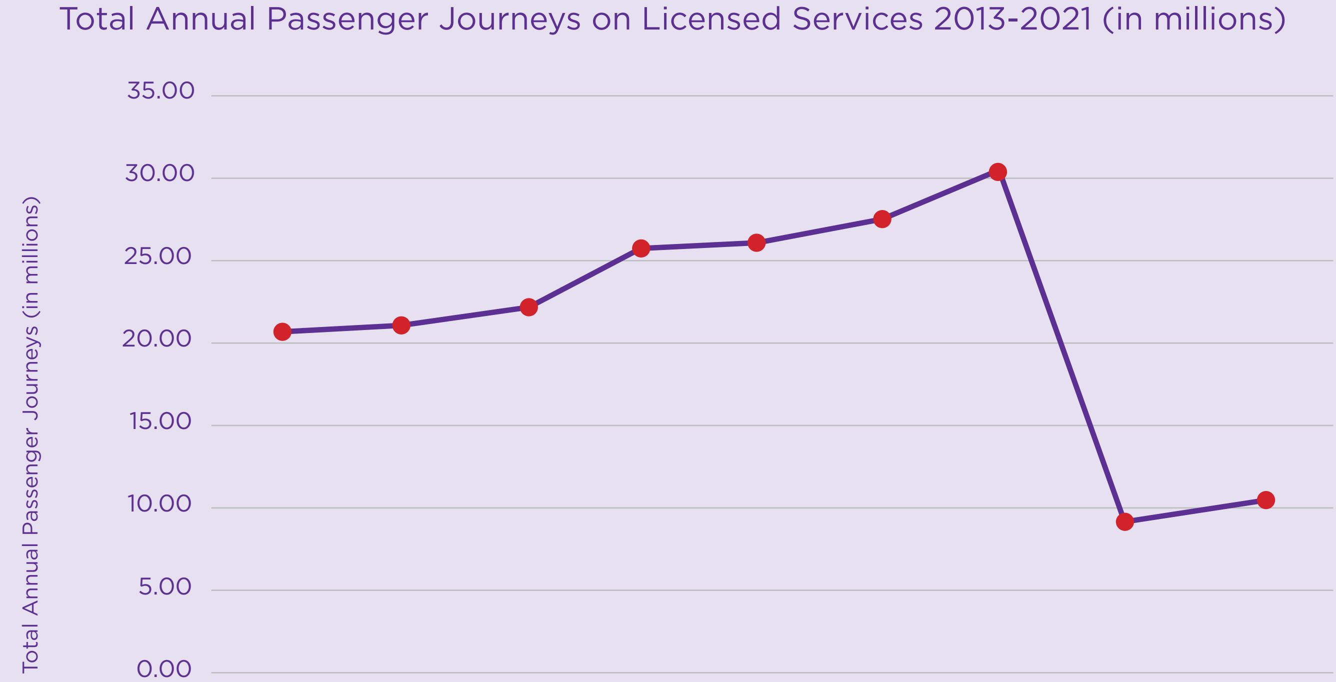
Total Number of Passenger Journeys

2013 was the first year for which data was collected on a national level for commercial bus services. Figures 1.1 and 1.2 show the total change in passenger journeys since 2013. The passenger figures for 2021 are then compared in Figure 1.3 to a baseline figure of 100% in 2013.

Between 2020 and 2021 total passenger journeys on regular commercial bus services increased by 8%, to 10.14 million journeys. See Figure 1.1. This represented approximately half of the 2013 total passenger journeys and a third of those in 2019. Most of this increase was on Non-GDA services. See Figures 1.2 and 1.3. These Non-GDA services had seen a less sharp decline in passenger journeys between 2019 and 2020 and a faster growth at 17% between 2020 and 2021, than GDA services which increased by 1%. This was the second consecutive year that passenger journeys on Non-GDA services increased more than passenger journeys on GDA services. Prior to 2020 and the COVID-19 pandemic, the Non-GDA share of total passenger journeys had decreased from 35% in 2013 to 29% in 2019.

Because of the slower decline of passenger journeys on Non-GDA services in 2020 and the greater increase in 2021, the share of national passenger journeys on Non-GDA services increased from 29% in 2019 to 41% in 2021. Some of the operators indicated that they had seen an increase in local journeys on services.

Figure 1.1: Commercial Bus Services Total Passenger Journeys by Year 2013-2021 (in millions)

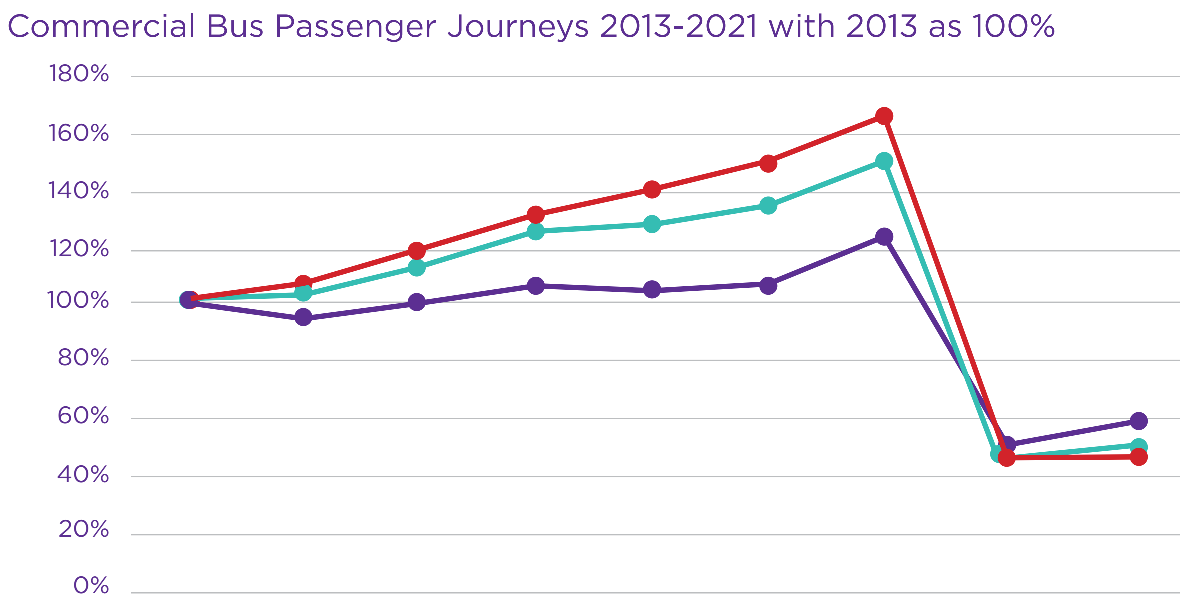


	2013	2014	2015	2016	2017	2018	2019	2020	2021
Passenger Journeys	20.10	20.75	22.73	25.25	25.78	27.51	30.52	9.43	10.14

Figure 1.2: Breakdown by Area of Total Annual Commercial Bus Services Passenger Journeys (in millions)

	2013	2014	2015	2016	2017	2018	2019	2020	2021
Non-GDA Services	7.06	6.74	7.06	7.64	7.41	7.90	8.84	3.59	4.18
GDA Services	13.02	14.01	15.67	17.61	18.37	19.62	21.68	5.84	5.89

Figure 1.3: Comparison of 2021 Commercial Bus Services Total Passenger Journeys (in millions) to baseline year of 2013



	2013	2014	2015	2016	2017	2018	2019	2020	2021
Non-GDA Services	100%	95%	100%	108%	105%	112%	125%	51%	59%
GDA Services	100%	108%	120%	135%	141%	151%	167%	45%	45%
All Commercial Bus Services	100%	103%	113%	126%	128%	137%	152%	47%	50%

Free Travel Passenger Journeys

The Department of Social Protection's Free Travel Scheme is available to all persons aged 66 and over living permanently in the State. Some people under 66 may also qualify, such as carers in receipt of a Carer's Allowance and certain other persons in receipt of a Disability Allowance or an Invalidity Pension.

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

Free travel is available on State funded bus and rail transport including Dublin Bus, Bus Éireann, Local Link, 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.

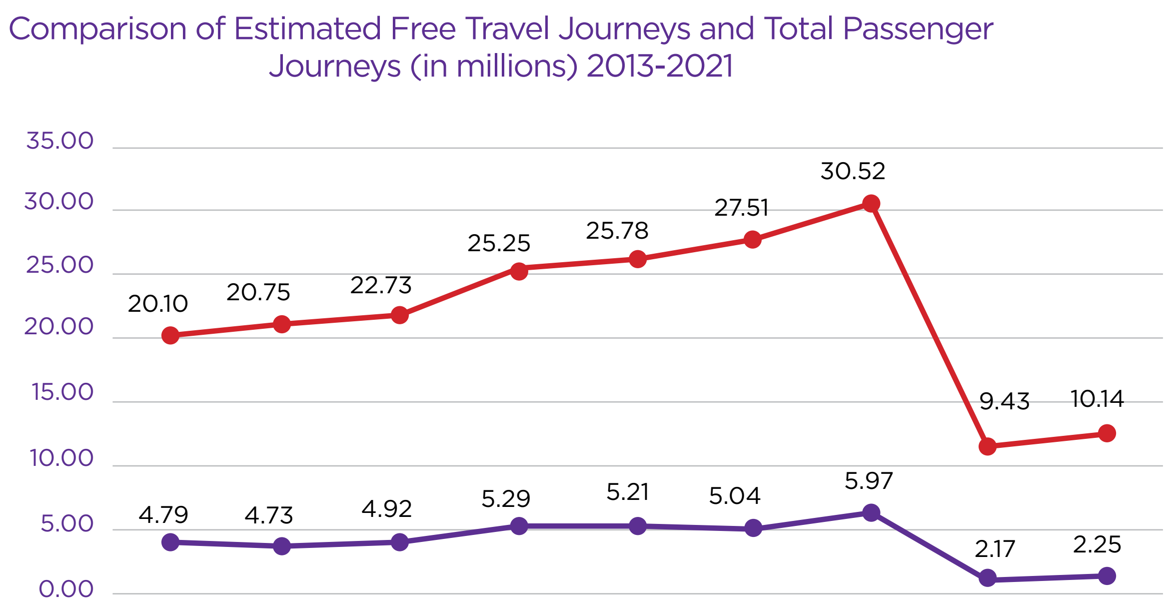
As part of the Annual Bus Operator Returns, commercial bus operators estimate the number of free travel passenger journeys as a percentage of all journeys for each licence and authorisation.

Figure 1.4 shows the trend and breakdown in estimated free travel passenger journeys. Between 2019 and 2020, the 64% decrease in national estimated free travel passenger journeys was less than the decrease in total passenger journeys, which dropped by 69%.

In 2021, there was an increase of national estimated free travel journeys on 2020. However, the rate of increase at 4% in national estimated free travel passenger journeys was less than the increase in national passenger journeys, which increased by 8%.

The percentage of all passenger journeys nationally which were estimated free travel passenger journeys continued to decline in 2021 and represented 22% of all passenger journeys for that year. This was less than the 24% of all passengers journeys reported in 2013.

Figure 1.4: Comparison of Estimated Free Travel Journeys and Total Passenger Journeys (in millions) 2013-2021



	2013	2014	2015	2016	2017	2018	2019	2020	2021
Total (Estimated) Free Travel Passenger Journeys	4.79	4.73	4.92	5.29	5.21	5.04	5.97	2.17	2.25
Total Passenger Journeys	20.10	20.75	22.73	25.25	25.78	27.51	30.52	9.43	10.14

2

Scheduled Vehicle Kilometres

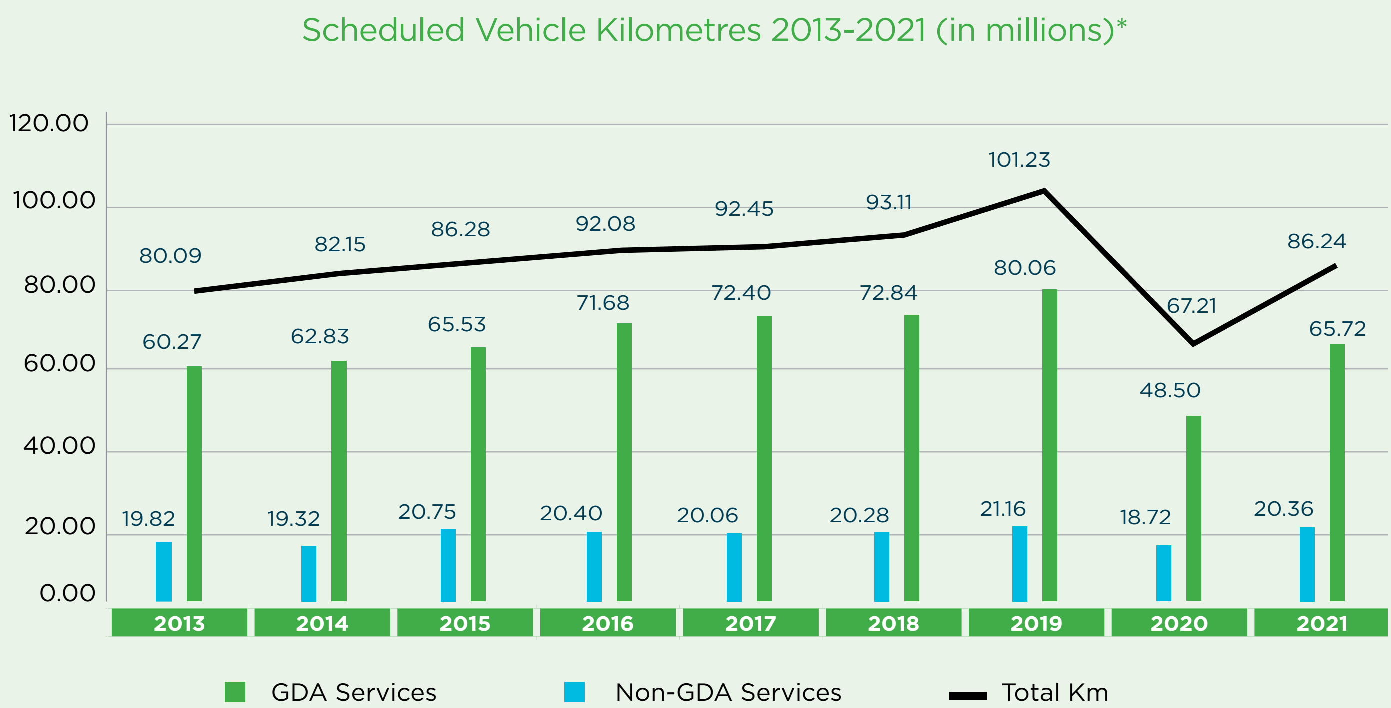
'Scheduled vehicle kilometres' indicate the total number of vehicle kilometres intended to be operated based on the licensed timetables. For 2020 and 2021, operators were asked to provide the actual number of vehicle kilometres operated. This was due to some services being partly or completely suspended, as well as to account for additional vehicles used due to the restrictions on public transport capacity throughout those years.

In 2020, the number of vehicle kilometres dropped by a third to 67% of 2019 levels.There was a greater drop in vehicle kilometres on GDA services, which decreased by 36%, than on Non-GDA services, which decreased by 34%.

Also in 2021, the number of vehicle kilometres were at 85% of 2019 levels. This was as national actual vehicle kilometres increased by 28% when compared to 2020. GDA services drove this increase as Non-GDA services had a 9% increase. However, there was not a corresponding rise in passenger numbers and national ticket revenue increased by 2%.

Lastly, in 2021 vehicle kilometres were 5% above the 2013 figure. Passenger journeys in 2021 were half of those of 2013.

Figure 2.1: Comparison of Scheduled Vehicle Kilometres for GDA and Non-GDA services by Year 2013-2021 (in millions)*



*Actual Vehicle Kilometres were returned for the years 2020 and 2021

3

Commercial Bus Services Revenue and Ticketing

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

Free Travel Revenue

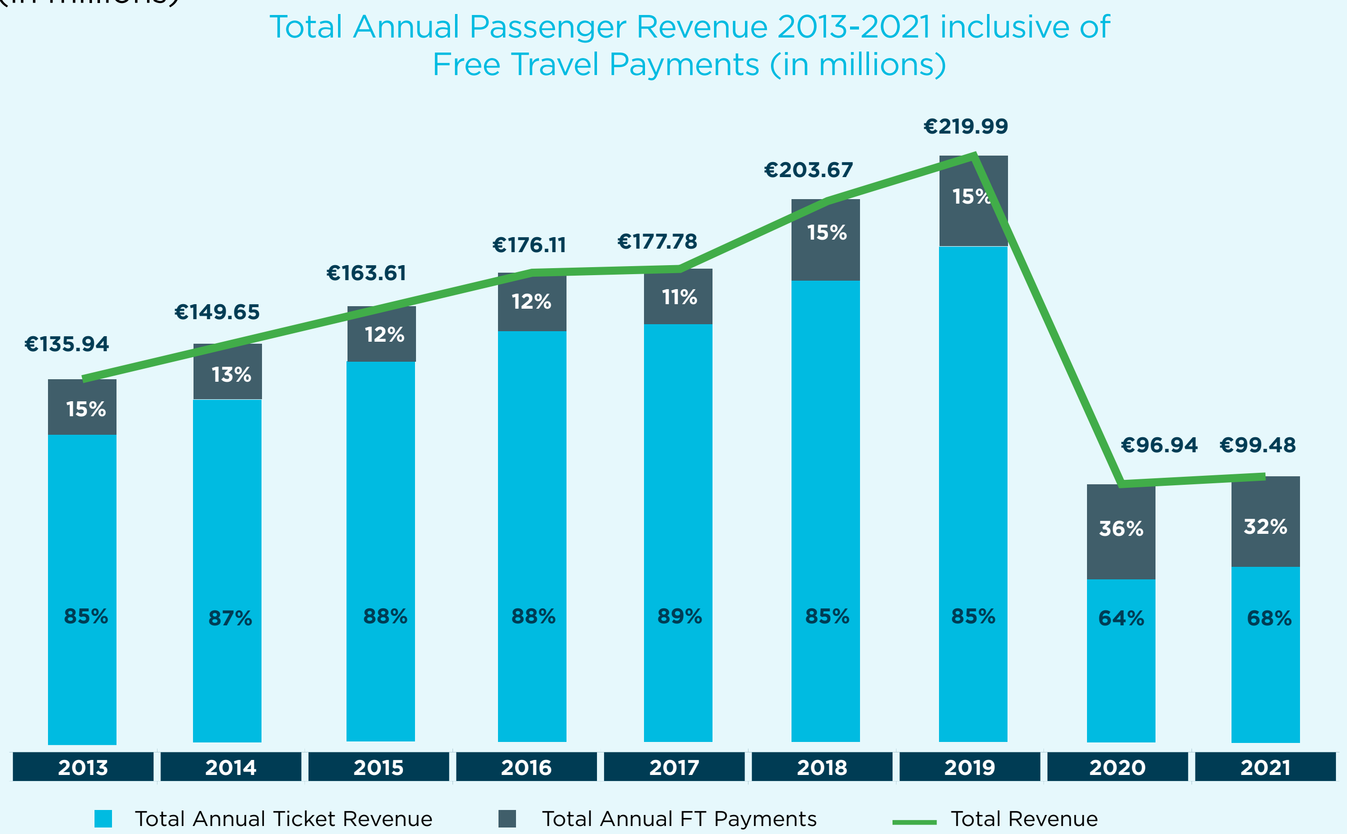
Operators that are part of the Department of Social Protection's Free Travel Scheme receive payments for the fare forgone for carrying passengers entitled to free travel.

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.

Passenger Revenue

In 2021, overall ticket revenue nationally increased by 2% when compared to 2020, bringing it to 45% of the total revenue in 2019. This was following a 56% decrease in revenue between 2019 and 2020. While passenger journeys nationally increased by 8% in the same period, operators have indicated that there were less return or weekly tickets being purchased with more one off and single journeys, more local journeys, and in some circumstances tickets bought in 2020 were honoured in 2021.

Figure 3.1: Commercial Bus Services Comparison of Revenue Types by Year 2013-2021 (in millions)



4

Commercial Operator Fleet Size

The commercial fleet referred to below is set out in terms of the total number of vehicles used and the number of vehicles used on a full-time basis to provide the commercial bus services. These figures were obtained by asking 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.

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

Between 2020 and 2021, there was a 20% decrease in vehicles being used on a full time basis. This followed a 14% increase in vehicles used between 2019 and 2020. As above, additional vehicles may have been deployed to provide individual services from March 2020 onward due to the capacity restrictions on public transport.

For 2021, the 20% reduction in vehicles used on a full time basis when compared to 2020 may have resulted from gradual capacity increases in 2021, as from 10th May 2021 to 18th July 2021 capacity increased from 25% to 50%, from 19th July 2021 to 30th August 2021 capacity increased from 50% to 75%, finally returning to 100% from 1st September 2021.

The average age of the vehicles also decreased, from 8 years to 6.6 years, and the average age remained below the 2019 level. The average age of the vehicles had been increasing between 2014 and 2017 but decreased in 2018 and excluding the year 2020 where additional vehicles were utilised for capacity reasons, has remained under an average of 7 years since.

Figure 4.1: Comparison of Operators Total Number of Vehicles used by Year 2013-2021

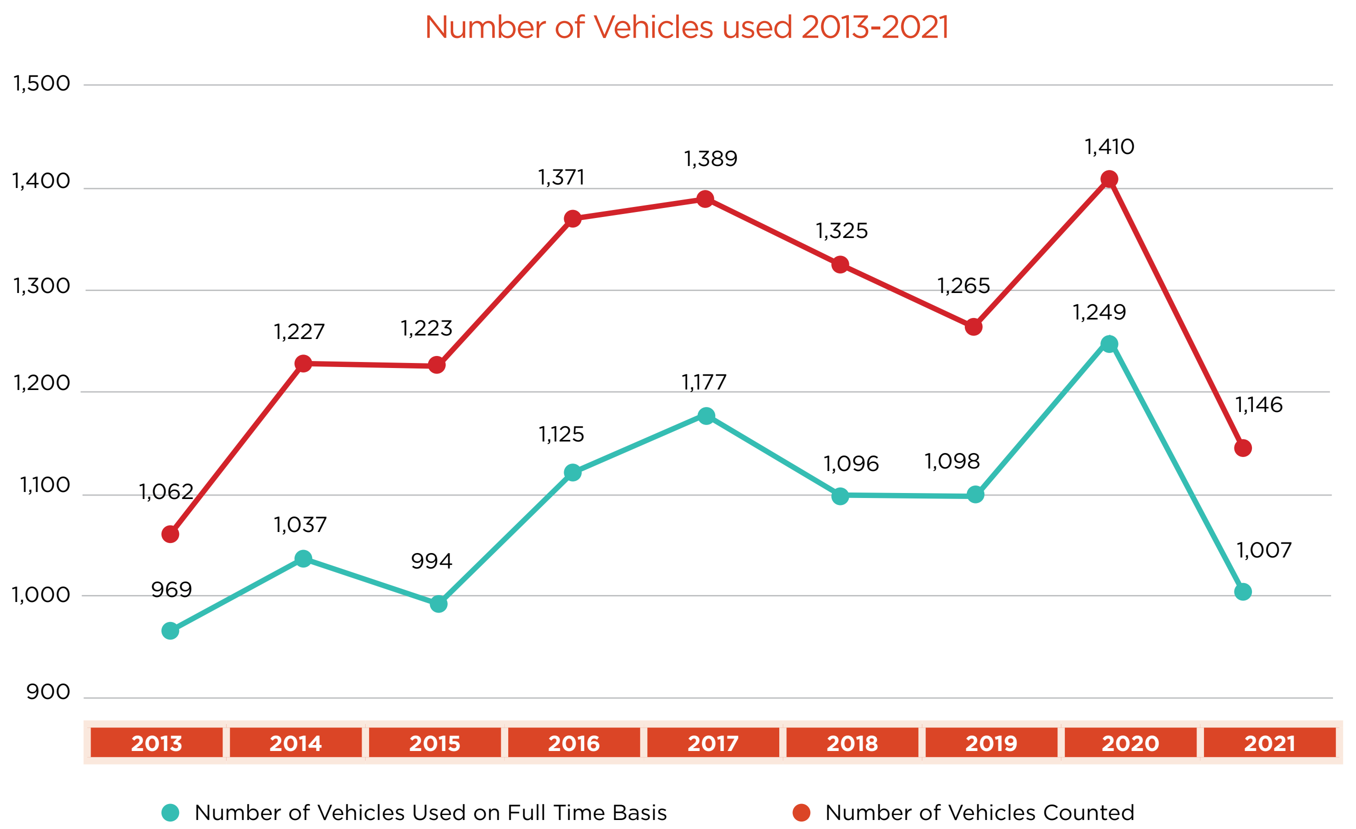
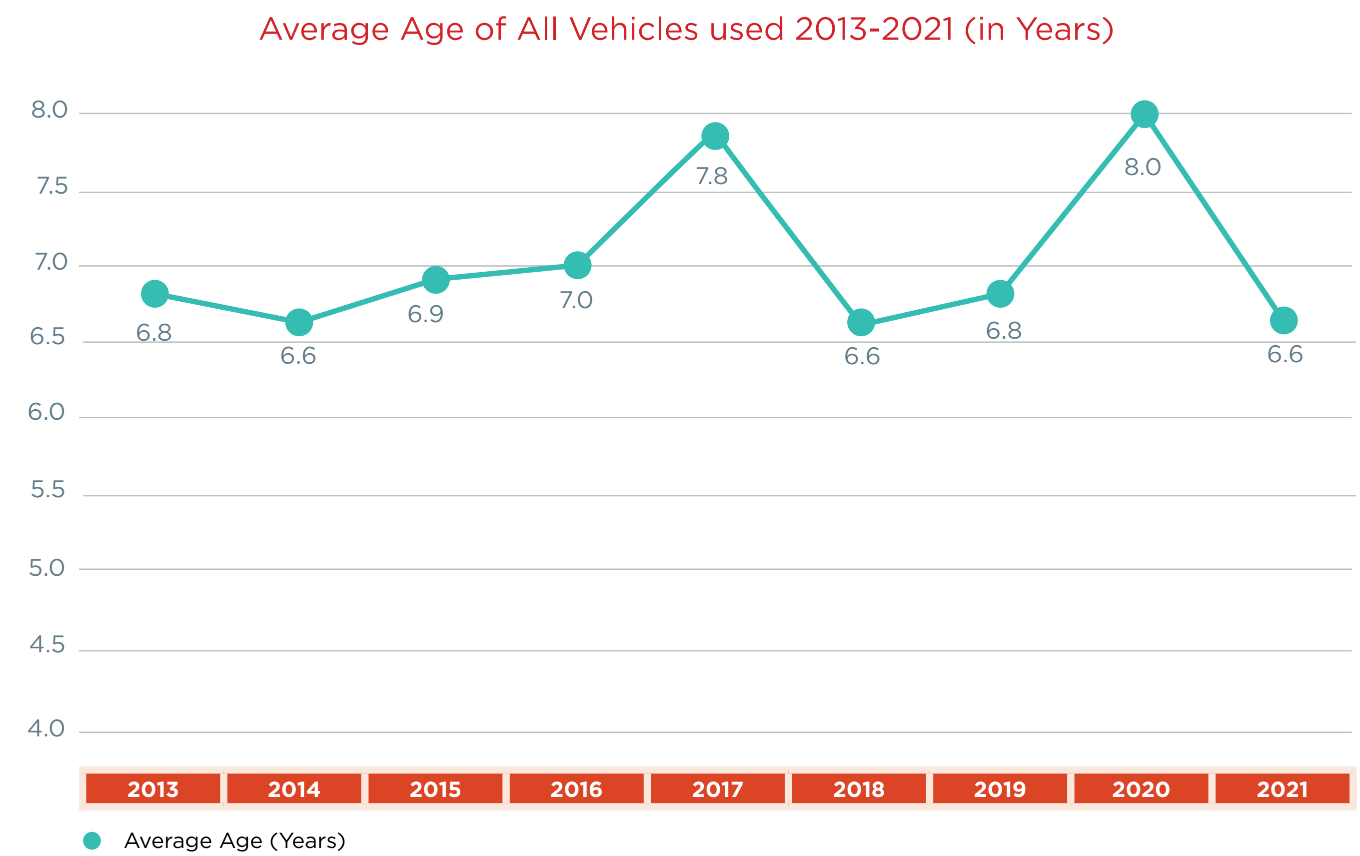


Figure 4.2: Comparison of Average Age of Vehicles used by Year 2013-2021



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