Statistical Bulletin: 01/ 2023
August 2023

Údarás Náisiúnta Iompair
National Transport Authority

Commercial Bus Services

in Ireland (Overview of 2022)

Bulletin Topics:

- Overview of Commercial Bus Services in 2022
- Total Number of Passenger Journeys
- Scheduled Vehicle Kilometres
- Commercial Bus Services Revenue and Ticketing
- Commercial Bus 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 2022

Due to the devastating impact of the COVID-19 crisis on the public transport market, the Authority provided funding to and allowed for partial or complete suspensions of commercial bus services. These supports were withdrawn in 2022. Consequently, 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, the lowest year in terms of passenger numbers, and 2022, to demonstrate the recovery since the outbreak of the pandemic. Comparisons are also drawn between 2013, the first year data was collected across the entire State, and 2022.

Note for 2022 figures

Some licence holders have updated their previously submitted data from their previous year's submissions. 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 operated without any public subsidy from the Authority. This has changed: firstly, temporary funding was made available to regular commercial bus service operators from mid-2020 to 2022 and secondly, in 2022 the Authority launched the Young Adult and Student Card ("YASC") Fares Scheme and 42 commercial bus operators opted into the Fares Scheme. Commercial bus operators receive compensation for the fare forgone for offering the 50% discount to 19-23 year-olds and to full-time third-level students.

As the Fares Scheme is voluntary and as commercial bus services are individually licensed by the Authority, a single commercial bus operator may have some regular licences in the Fares Scheme and others that are not. 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 commercial bus services which cross the border into Northern Ireland.

The figures for commercial bus services provided by the two principal contracted State-funded bus operators, Bus Éireann (under the brand name of "Expressway") and Dublin Bus, 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.

Commercial 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 commercial 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.

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

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

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.

Licence 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 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

Nine operators did not supply returns for commercial bus services provided in 2022. This represented 5% of all licences in 2022. The combined figures for these licences accounted for less than 1% of the overall totals for 2020 passenger journeys or 3.2% of operated kilometres. Due to the rounding used in this bulletin the figures would have a low statistical impact on the percentages stated however, the actual figures for 2022 could be higher than recorded.

Bulletin Topics

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 2022

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 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 commercial 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 bus services resumed in full or in part in July/ August 2020. The supports continued throughout 2021 and ceased in June 2022.

To allow commercial bus operators maximum agility to respond to the changing passenger demand and to enable the fastest possible return of services, the Authority also permitted commercial bus operators to partially or fully suspend their licensed regular services from March 2020. While demand for travel in 2022 was above 2021 levels and there were no capacity restrictions on public transport in 2022, it remained unviable for some services to operate or operate in full. Suspensions of services, in whole or in part, were permitted until 7th November 2022.

During the periods in 2020 and 2021 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 number of vehicles utilised. For this reason, operators were asked to provide the actual operated vehicle kilometres for each licence for the years 2020 and 2021. Due to complete or partial suspensions of licensed regular services being allowed in 2022, the Authority again asked operators to provide actual operated vehicle kilometres. 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 2022, the vehicle kilometres provided were at 81% of 2019 levels, whereas ticket revenue was at 78%. There was a capacity restriction of 25% in place at the start of 2020, which gradually returned to 100% capacity on 1st of September 2021. However, the demand for travel still rendered many services commercially unviable to operate.

The 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 2022. This is especially evident in the different levels of change between kilometres operated and passenger journeys from 2020 to 2022, also shown in Figures A to E and Table A.

In 2022, passenger journeys on GDA services saw an increase of 109% on 2021 figures. This was the highest increase in year to year passenger journeys observed. This brought GDA services passenger journeys to 111% of the 2020 figure. Despite this, passenger journeys in 2022 were at 57% of 2019 passenger journey levels. For the first year since 2019, the share of passenger journeys on Non-GDA services decreased. The share of passenger journeys on GDA services had been increasing between the years 2014 to 2019, when the impact of COVID-19 saw the overall share of GDA services passenger journeys start to decrease in 2020 and 2021. See Figure D. The Non-GDA service passenger journeys decrease was less than GDA services between 2019 and 2020 and increased less between 2021 and 2022. See Figure 1.2.

Figure A: Overview of Figures for Commercial Bus Services in 2022 and 2020 Compared to 2019

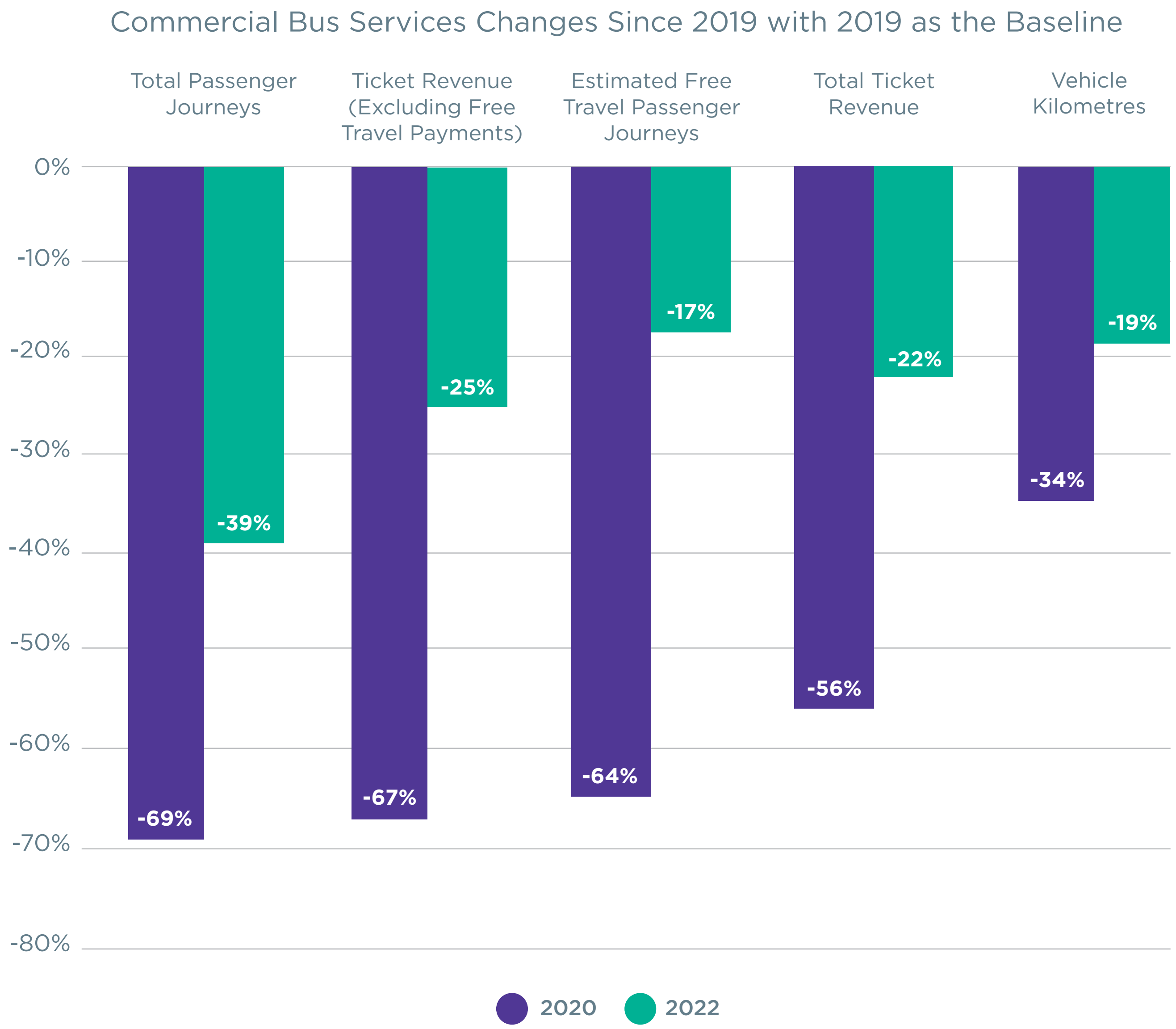


Figure B: Overview of Figures for Commercial Bus Services in 2022 Increases Shown Compared to 2020

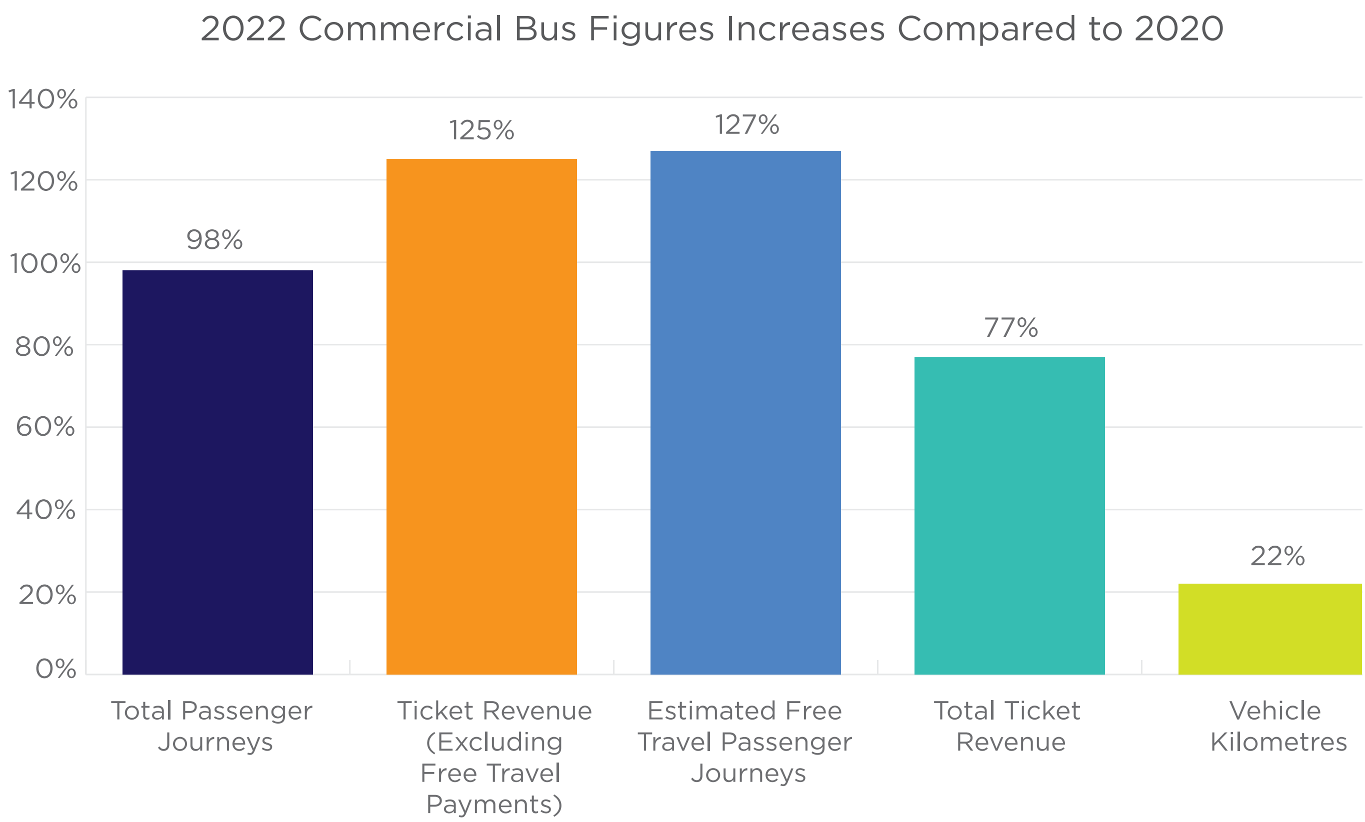
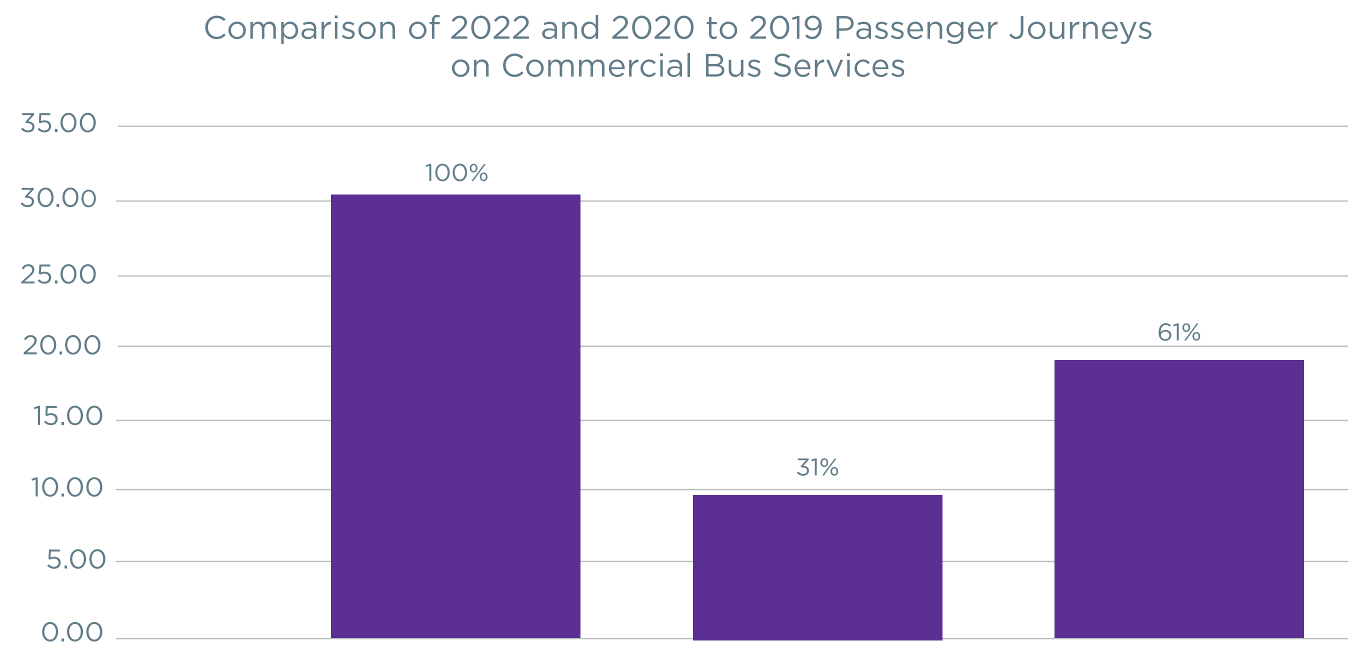


Figure C: Overview of Passenger Figures for Commercial Bus Services in 2022 and 2020 Compared to 2019



	2019	2020	2022
Total Passenger Journeys (in millions)	30.52	9.43	18.63

Figure D: Breakdown of Passenger Journeys by Service Area for Commercial Bus

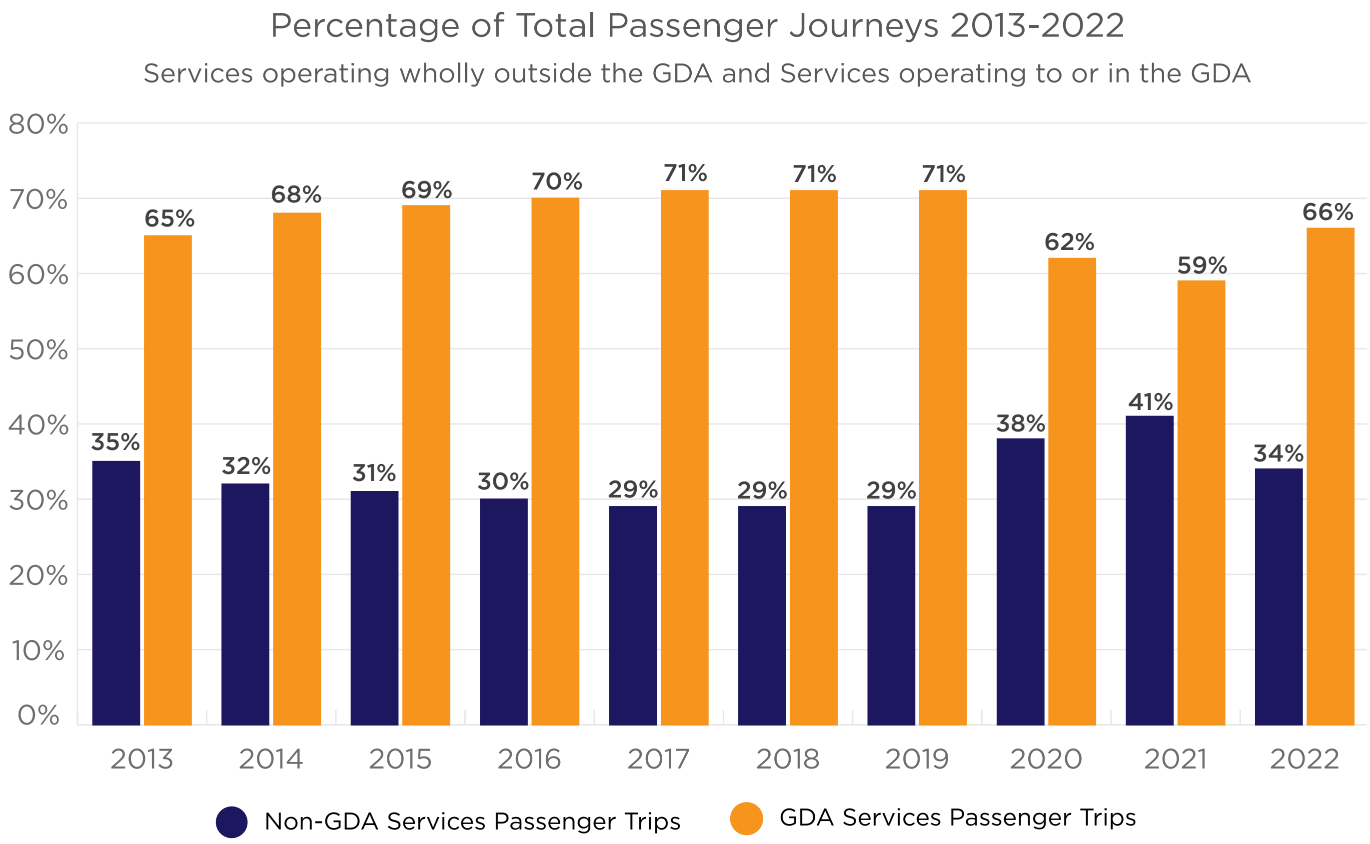
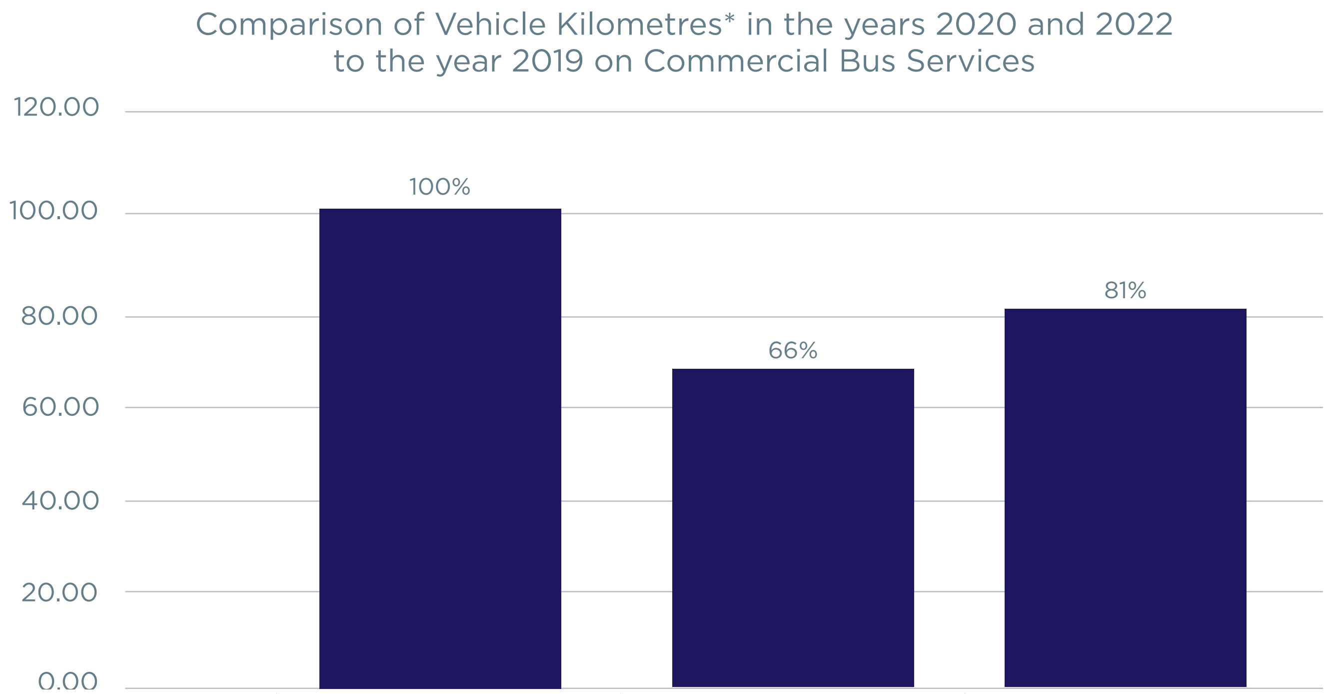


Figure E: Overview of Vehicle Kilometres Figures for Commercial Bus Services in 2022 and 2020 Compared to 2019



	2019	2020	2022
Vehicle Kilometres (in millions)	101.23	67.21	82.33

*Scheduled vehicles kilometres were returned for 2019 and actual vehicle kilometres were returned for the years 2020 to 2022

Table A: Comparison of 2022 Total 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
2020	9.43	67.21	€97.09
2022	18.63	82.33	€172.16
Change: 2013-2019	52%	26%	61%
Change: 2013-2022	-7%	3%	27%
Change: 2019-2022	-39%	-19%	-22%
Change: 2020-2022	98%	22%	77%

*Scheduled vehicles kilometres were returned for the years 2013 to 2019 and actual vehicle kilometres were returned for the years 2020 to 2022

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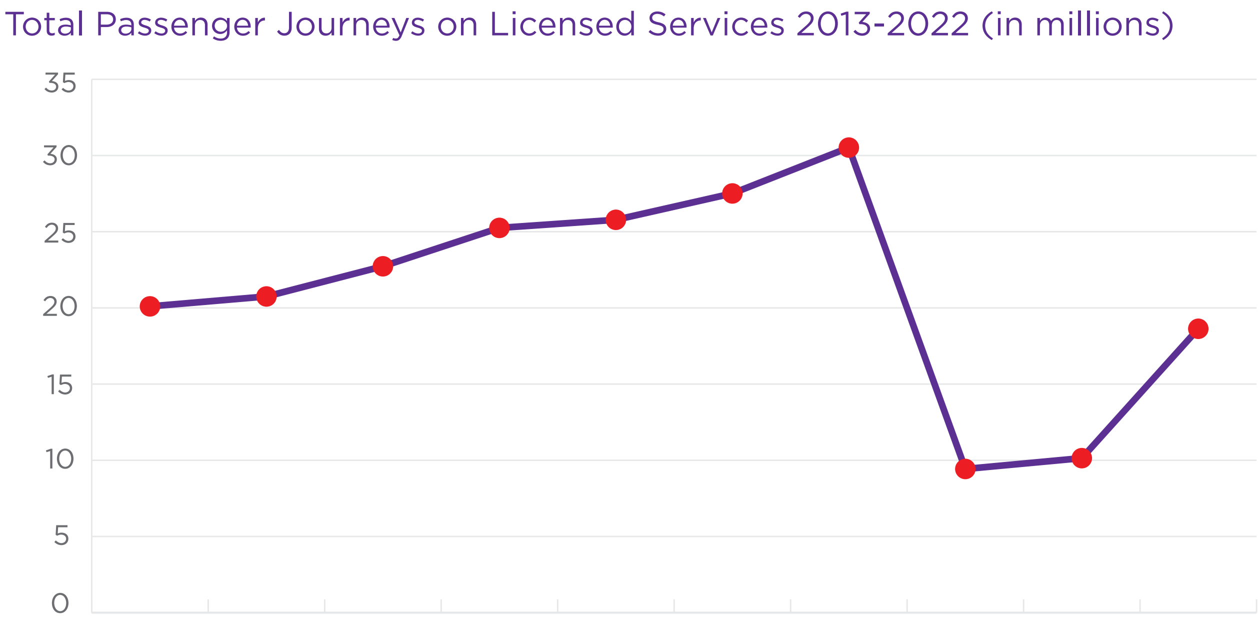
Total Number of Passenger Journeys

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 2022 are then compared in Figure 1.3 to a baseline figure of 100% in 2013. Passenger journey figures remain below 2013 levels, despite an 84% increase between 2021 and 2022.

Between 2020 and 2022, total passenger journeys on regular commercial bus services had almost doubled, increasing by 98% or 9.2 million passenger journeys, to 18.6 million passenger journeys. See Figure 1.1. This represented approximately 93% of the 2013 total passenger journeys. Compared to 2019, passenger journeys in 2022 were at 61%, up from 31% in 2020. The level of increase in 2022 was driven by significant increases on GDA services. These services increased passenger journeys at over double the rate of Non-GDA services between 2021 and 2022. See Figures 1.2, 1.3 and 1.4. Non-GDA services had seen a less steep decline in passenger journeys between 2019 and 2020 and initially faster growth, at 17% between 2020 and 2021. GDA services increased by 1% in the same period. Passenger journeys on Non-GDA services increased by 50% between 2021 and 2022. 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. The share of passenger journeys on Non-GDA services increased between 2019 and 2021, to 41% of all passenger journeys. This decreased to 34% in 2022. See Figure D above.

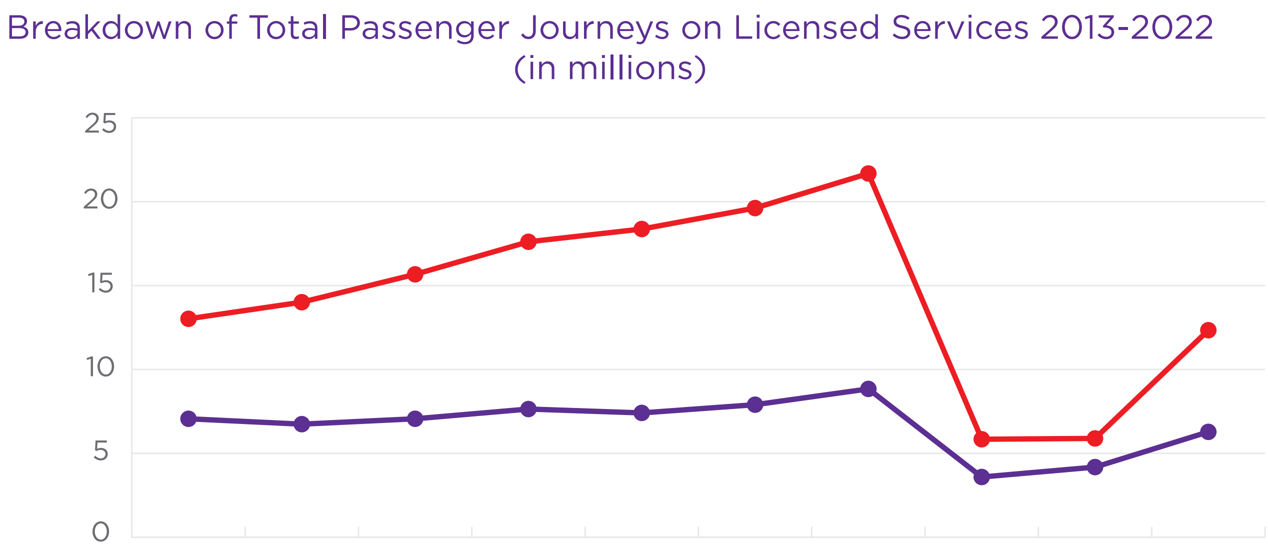
At the onset of the COVID-19 pandemic, Non-GDA services had a lower decline of passenger journeys, at a 59% reduction between 2019 and 2020, than GDA services which saw passenger journeys decline by 73%. Due to the large increase in passenger journeys on GDA services between 2021 and 2022, GDA passenger journeys were at 57% of 2019 passenger levels. Non-GDA services were at 71%. It is noted that for 2022 both estimated Free Travel passenger journeys and vehicle kilometres on Non-GDA services are up on 2019 figures. Estimated Free Travel passenger journeys is up by 7% and vehicle kilometres are up 1.4%.

Figure 1.1: Commercial Bus Services Total Passenger Journeys by Year 2013-2022 (in millions)



	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Passenger Journeys	20.10	20.75	22.73	25.25	25.78	27.51	30.52	9.43	10.14	18.63

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



	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Non-GDA Services	7.06	6.74	7.06	7.64	7.41	7.90	8.84	3.59	4.18	6.28
GDA Services	13.02	14.01	15.67	17.61	18.37	19.62	21.68	5.84	5.89	12.34

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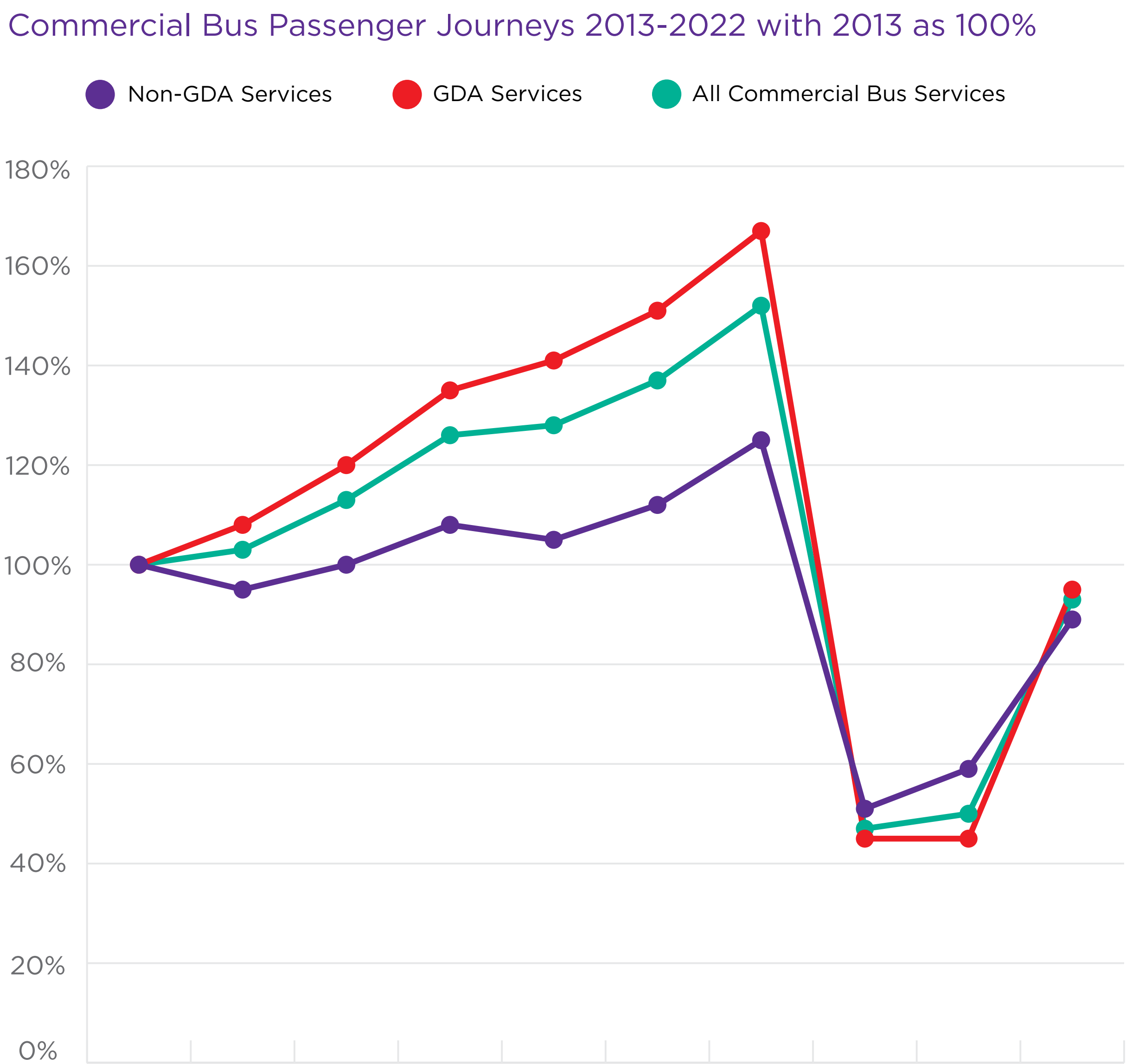
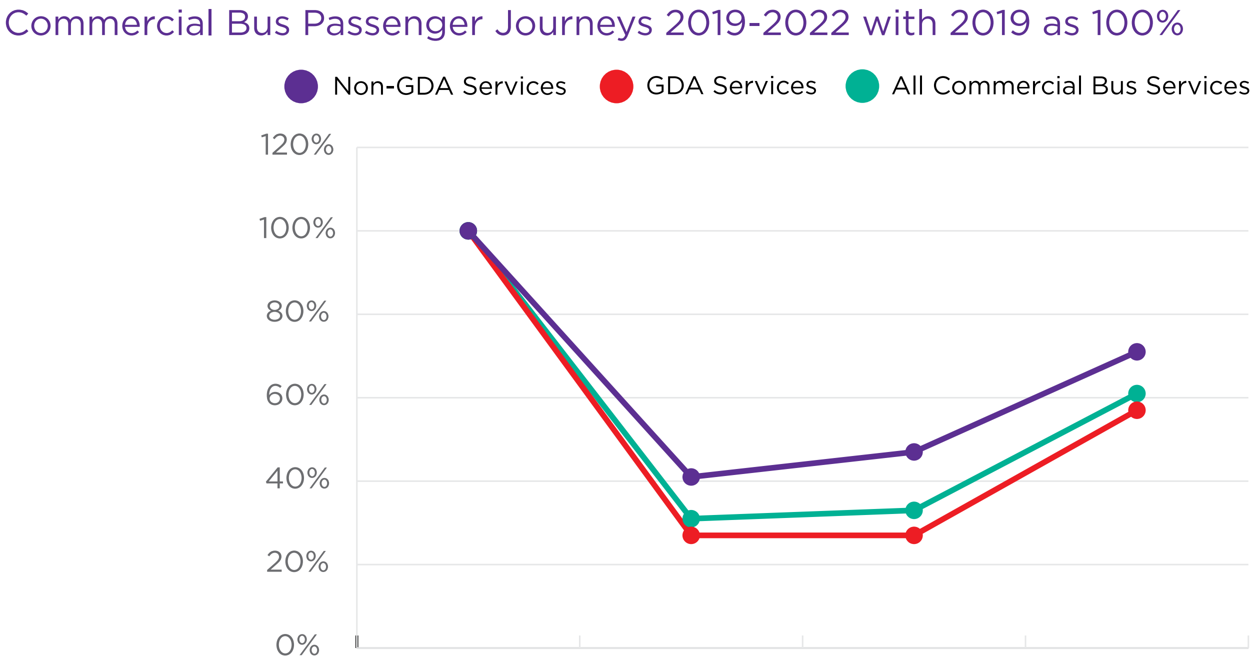
Figure 1.3: Comparison of 2022 Commercial Bus Services Total Passenger Journeys to Baseline Year of 2013



	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Non GDA Services	100%	95%	100%	108%	105%	112%	125%	51%	59%	89%
GDA Services	100%	108%	120%	135%	141%	151%	167%	45%	45%	95%
All Commercial Bus Services	100%	103%	113%	126%	128%	137%	152%	47%	50%	93%

Figure 1.4: Comparison of 2022 Commercial Bus Services Total Passenger Journeys to Baseline Year of 2019



	2019	2020	2021	2022
Non-GDA Services	100%	41%	47%	71%
GDA Services	100%	27%	27%	57%
All Commercial Bus Services	100%	31%	33%	61%

Estimated 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.

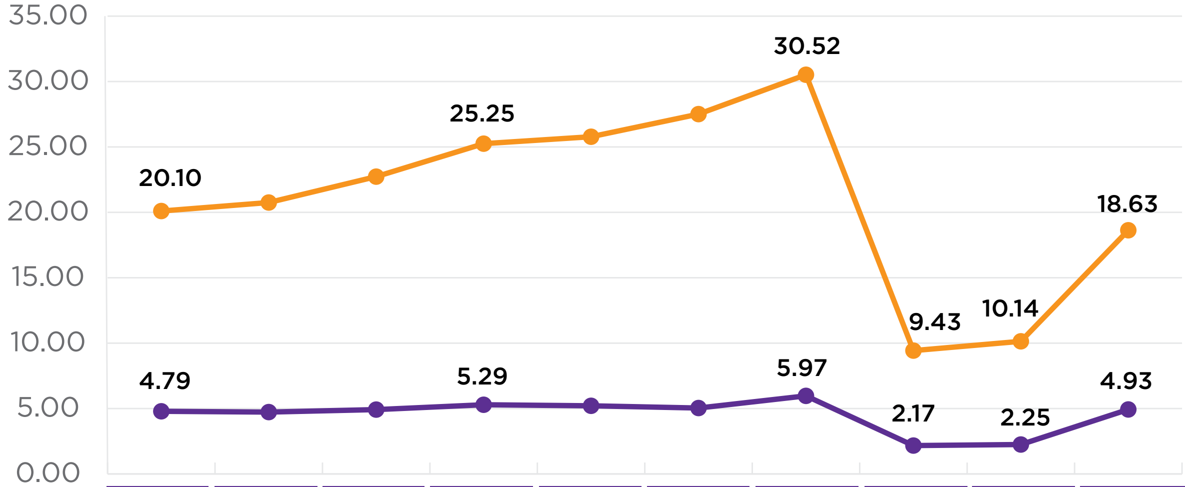
Free travel is available on State funded bus and rail transport including Dublin Bus, Bus Éireann, Go-Ahead Ireland, Local Link, Iarnród Éireann, and Luas services. Free travel is also available on a number of commercial bus services. Operators that are part of the Free Travel Scheme receive payments 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 ('estimated FTP journeys') as a percentage of all passenger journeys for each licence and authorisation.

Figures 1.5 and 1.6 show the trend and breakdown in estimated FTP journeys. On Non-GDA services, estimated FTP journeys were at a higher level in 2022 than in 2019. In 2022, approximately 59% of all passenger journeys on Non-GDA services were estimated FTP journeys, up from 40% in 2019. On GDA services, estimated FTP journeys were approximately 10% of all passenger journeys, down from 11% in 2019. Between 2019 and 2020, the 64% decrease in national estimated FTP journeys was less than the decrease in total passenger journeys, which dropped by 69%. In 2022, estimated FTP journeys represented a higher amount of overall passenger journeys at 26% of all passenger journeys than in 2019, when they represented 20% of all passenger journeys.

Figure 1.5: Comparison of Estimated FTP Journeys and Total Passenger Journeys (in millions) 2013-2022

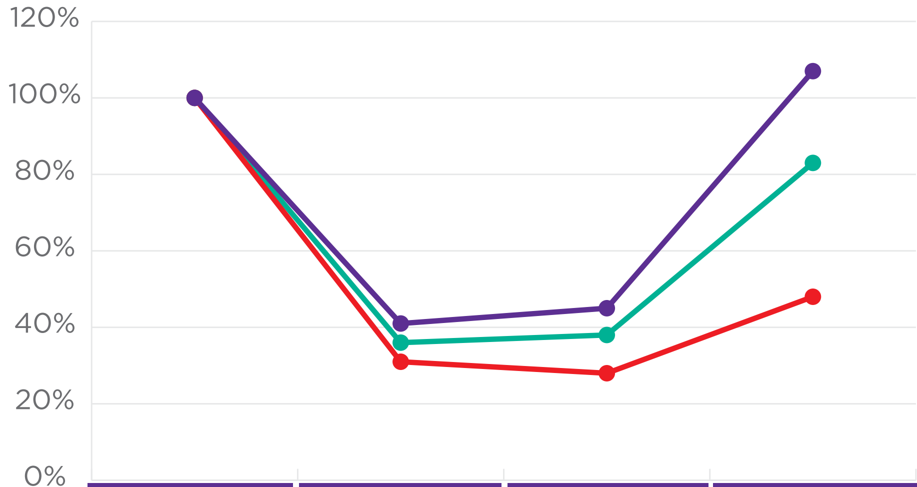
Comparison of Estimated FTP Journeys and Total Passenger Journeys (in millions) 2013-2022



	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Total Estimated FTP Journeys	4.79	4.73	4.92	5.29	5.21	5.04	5.97	2.17	2.25	4.93
Total Passenger Journeys	20.10	20.75	22.73	25.25	25.78	27.51	30.52	9.43	10.14	18.63

Figure 1.6: Comparison of 2022 Estimated FTP Journeys to Baseline Year of 2019

Comparison by Service Type of Total Estimated FTP Journeys 2019-2022 with 2019 as 100%



	2019	2020	2021	2022
Estimated FTP on Non-GDA Services	100%	41%	45%	107%
Estimated FTP on GDA Services	100%	31%	28%	48%
Total Estimated FTP Journeys	100%	36%	38%	83%

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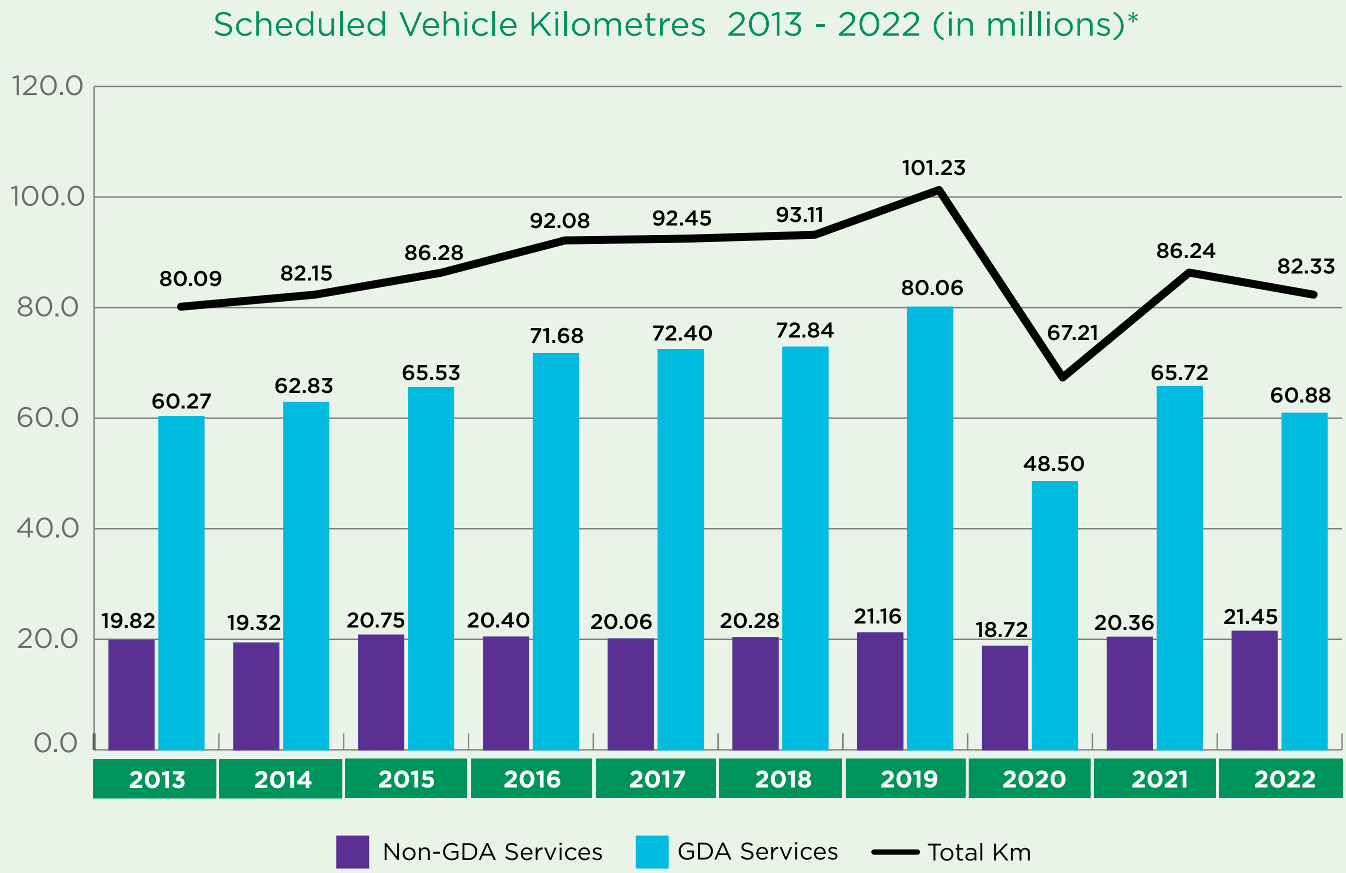
Scheduled Vehicle Kilometres

‘Scheduled vehicle kilometres’ indicate the total number of vehicle kilometres intended to be operated based on the licensed timetables. For 2020 to 2022, 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 in 2020 and 2021. Therefore, all references below are to vehicle kilometres, to allow for both metrics.

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%. In 2022, vehicle kilometres had increased by 22% on 2020 figures to 81% of the 2019 total. See Figure A and Table A above. This represents a closer figure to 2019 totals than the passenger journeys, which were at 61% of the 2019 totals. For Non-GDA services there was a 1% increase on 2019 vehicle kilometres. Overall, vehicle kilometres were down on 2021 figures due to a decrease in GDA vehicle kilometres in 2022.

Figure 2.1: Comparison of Vehicle Kilometres for GDA and Non-GDA services by Year 2013-2022 (in millions)



*Scheduled vehicles kilometres were returned for the years 2013 to 2019 and actual vehicle kilometres were returned for the years 2020 to 2022

Table B: Change in Total Vehicle Kilometres per Year with 2013 as 100%

Year	Non-GDA Services	GDA Services	All Commercial Bus Services
2013	100.0%	100.0%	100.0%
2014	97.5%	104.3%	102.6%
2015	104.7%	108.7%	107.7%
2016	102.9%	118.9%	115.0%
2017	101.2%	120.1%	115.4%
2018	102.3%	120.9%	116.3%
2019	106.7%	132.8%	126.4%
2020	94.4%	80.5%	83.9%
2021	102.7%	109.0%	107.7%
2022	108.2%	101.0%	102.8%

3

Commercial Bus Services Revenue and Ticketing

Commercial bus services 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 Authority's YASC Fares Scheme and 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 bus 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. Total revenue is provided both inclusive and exclusive of Free Travel Payments.

Grant Aid 2020-2022

Temporary funding was made available to regular commercial bus service operators between June 2020 and June 2022 as they were determined by the Authority as being economically necessary to continue through the COVID-19 pandemic. Grant Aid is not included in the overall ticket revenue set out below.

Young Adult and Student Card Fares Scheme

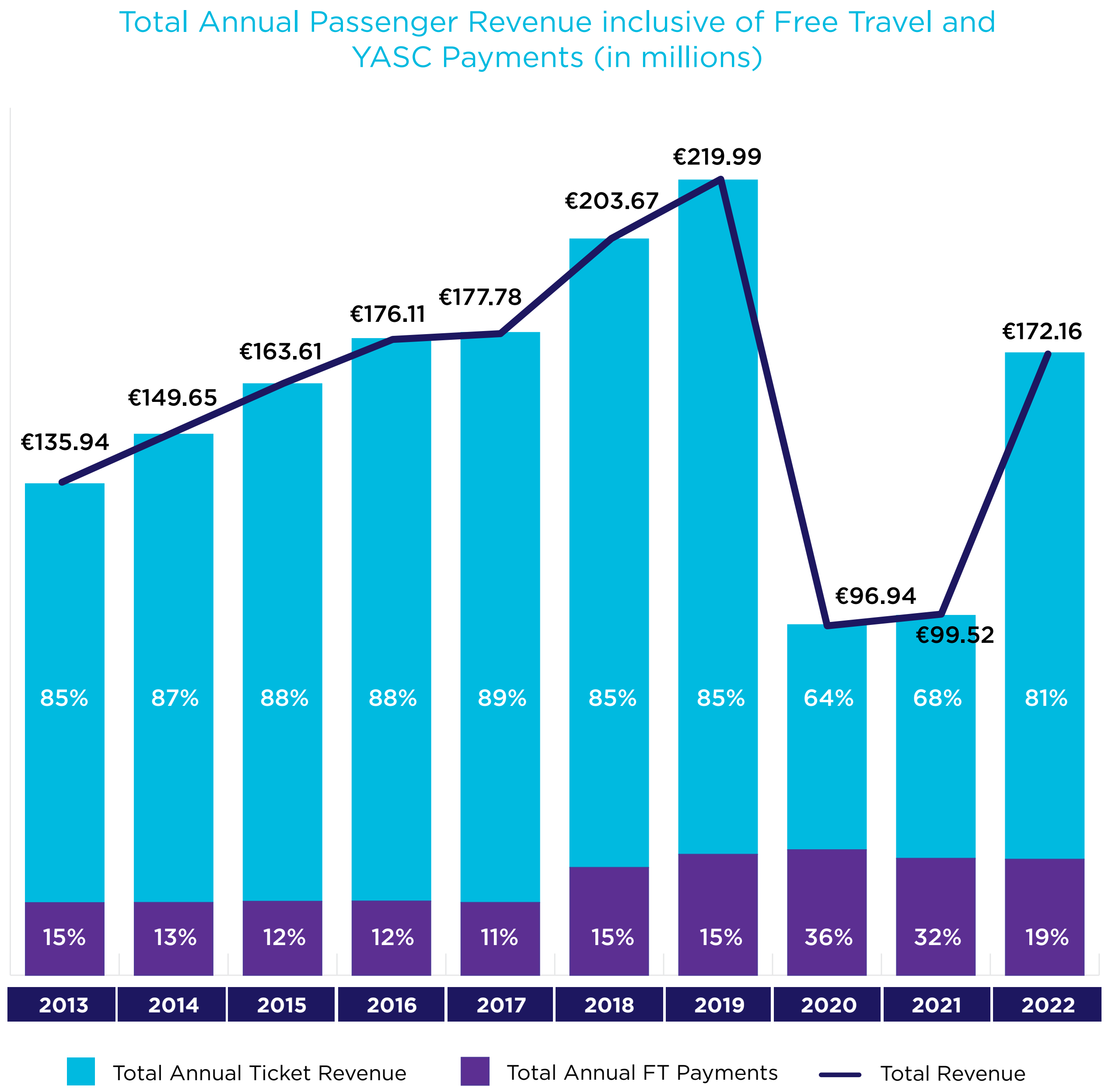
In 2022, the Authority launched the YASC Fares Scheme. Participation in the Fares Scheme is on a voluntary basis. 42 commercial bus operators opted into the Fares Scheme in 2022. As part of the Fares Scheme, commercial bus operators receive compensation for the fare forgone for offering the 50% discount to 19-23 year-olds and to full-time third level students.

Commercial bus operators may have more than one regular licence in the Fares Scheme as well as having licences which are not in the Fares Scheme. Operator revenue includes payments as part of the Fares Scheme.

Passenger Ticket Revenue

In 2022, overall ticket revenue nationally increased by 125% when compared to 2020, bringing it to 77.6% of the total revenue in 2019. See Figure B. The 2022 ticket revenue was at 127% of that reported for 2013. This was following a 56% decrease in revenue between 2019 and 2020. Passenger journeys nationally increased by 98% between 2020 and 2022.

Figure 3.1: Commercial Bus Services Comparison of Revenue Types by Year 2013-2022 (in millions)



4

Commercial Bus 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 bus 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.

In 2022, there were 7% less vehicles used on a full-time basis to provide the commercial bus services than in 2019. Between 2020 and 2022, 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 2022, the 18% 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 used in 2022 decreased slightly from 6.8 years in 2019 to 6.7 years in 2022. The average age of the vehicles used had been increasing between 2014 and 2017 but decreased in 2018. 2020 saw the largest increase in age of vehicles on previous years as more vehicles were needed to provide services due to capacity restrictions on public transport.

Figure 4.1: Comparison of Total Number of Vehicles used by Operators by Year 2013-2022

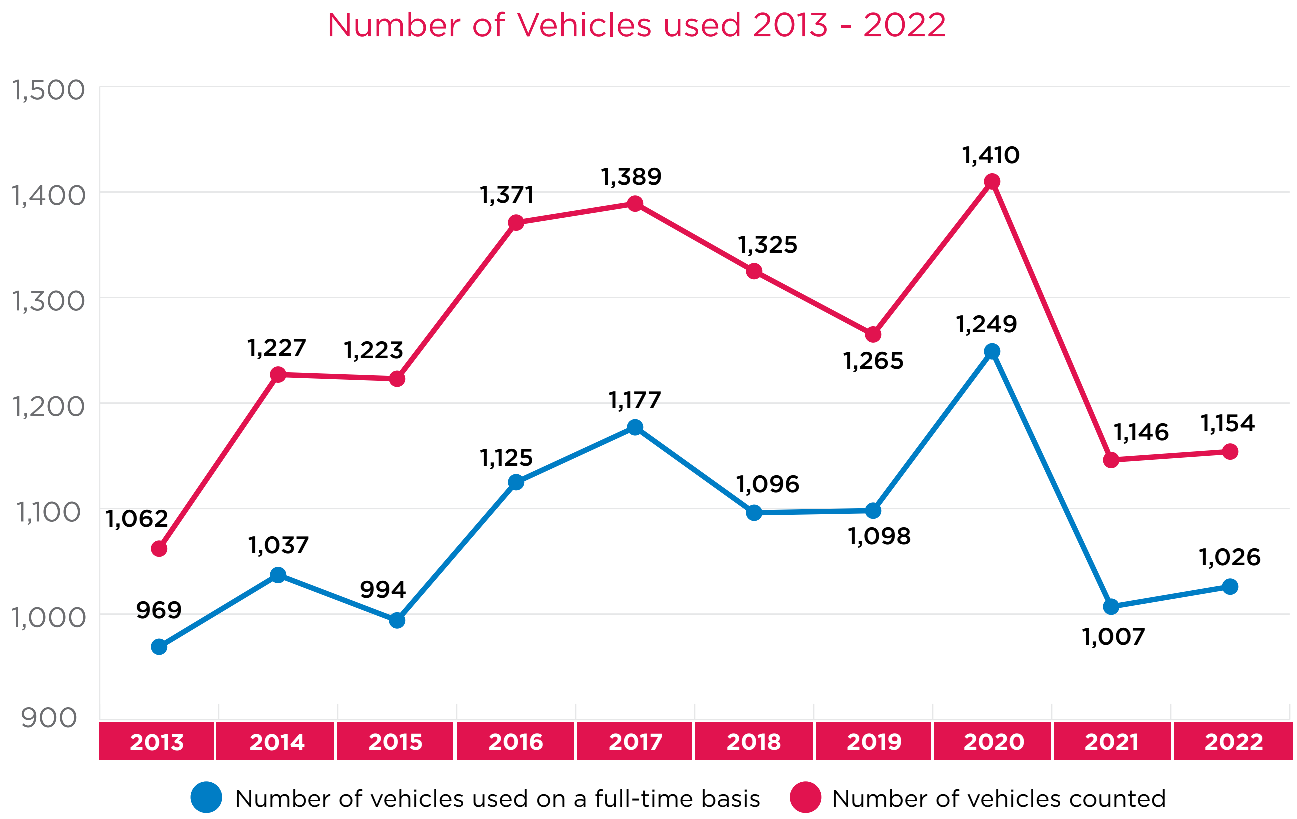
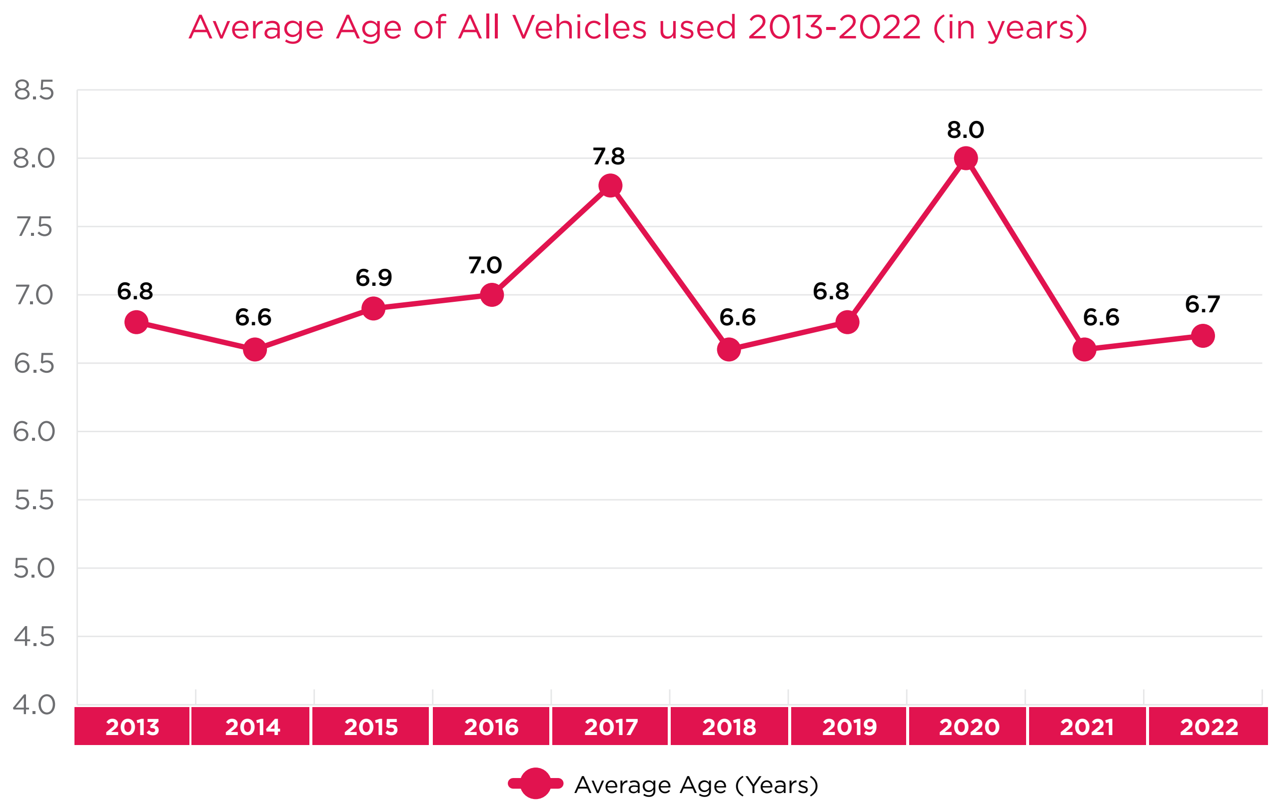


Figure 4.2: Comparison of Average Age of Vehicles used by Year 2013-2022



Due to COVID-19 and social distancing more vehicles were required to provide services in 2020. As a result the average age of the vehicles increased in 2020.

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