Údarás Náisiúnta Iompair
National Transport Authority

Bus and Rail Statistics for Ireland

State Funded Services

Statistical Bulletin Number: 02/2022
November 2023

Bulletin Topics:

- Total Number of PSO Passenger Journeys
- PSO Passenger Journeys by Region
- Total Operated Vehicle Kilometres
- and Vehicle Seat Kilometres
- Passenger Revenues
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- Free Travel Scheme Revenue
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Introduction

This statistical bulletin is a publication of the National Transport Authority of Ireland ("the Authority"). It focuses on Public Service Obligation (PSO) bus services provided on behalf of the Authority by Dublin Bus, Bus Éireann, the Local Link rural transport programme, as well as other PSO bus routes operated by private operators who have been successful in Authority tender competitions, including services in the Dublin region, Kilkenny city and Waterford city. It also covers heavy rail services provided by Iarnród Éireann (Irish Rail) and Luas light rail services operated and maintained by Transdev Dublin Light Rail Limited.

The data presented in this bulletin for 2022 reflects the reopening of the economy and a return to full capacity on public transport services, following severe travel restrictions imposed by the Irish government between March 2020 and early January 2022 resulting from the COVID-19 pandemic.

Bus services

EU Regulation 1370/2007 and the DTA Act 2008 requires that Public Service Obligation (PSO) Services should be provided through a Public Service Contract with a competent Authority which in the case of this state is the National Transport Authority. PSO services are socially necessary transport services which may not be commercially viable and as such they usually require a state subsidy to operate.

On the 1st December 2019, the Authority entered into new direct award contracts with Dublin Bus and Bus Éireann. The new direct award contracts provided for the transition from net cost contracts to gross cost contracts in 2021. This brought these direct award contracts into line with the Authority's competitively tendered contracts. The new contracts include additional measures to encourage improvements to operational performance at an individual route level.

Dublin Bus and Bus Éireann currently provide the majority of PSO bus services under contract to the Authority. In April 2018, the Authority also entered into a contract with Go Ahead Ireland for the operation of a number of local and orbital bus routes in Dublin. A phased implementation of these services commenced in September 2018, with a full transfer being completed by March 2019.

Go Ahead Ireland successfully tendered for the operation of Dublin Commuter routes along the Kildare corridor (formerly operated by Bus Éireann under direct award). Bus Éireann also successfully tendered for the continued operation of city services in Waterford. Each competitively tendered contract incorporated improved standards for punctuality, reliability and customer experience.

Go Ahead Ireland was awarded a contract for the route 197 bus service between Swords and Ashbourne, and City Direct was awarded a contract for the operation of two urban bus routes in Kilkenny City (Routes KK1 and KK2), with services commencing operation in November and December 2019 respectively.

The Authority has continued with its commitment of both developing new and enhancing existing public transport services through the BusConnects Network Redesign programme in Dublin, which commenced in June 2021. The programme will be delivered in phases with the aim of increasing bus service provision, increasing capacity, service frequency and to better meet the needs of passengers throughout the Dublin metropolitan area in the coming years.

Three other public service contracts were in place with the Authority in 2022 with Andrew Wharton Coach Hire, Bernard Kavanagh and Sons Ltd and J.J. Kavanagh & Sons.

Local Link provides PSO bus services in many areas of rural Ireland with passenger journeys tending to be local in nature but with connections to more regional and intercity services. It also provides a number of services delivering passengers door-to-door. Management of this programme was transferred to the Authority in April 2012. A set of Local Link offices were established by the Authority to administer the provision of Local Link services planned and funded by the Authority. The Connecting Ireland programme also commenced in 2022, expanding rural bus service provision and providing increased connectivity between towns and villages and other forms of public transport across the country.

Rail services

On the 1st December 2019, the Authority entered into a further 10-year direct award PSO contract with Iarnród Éireann. As with the directly awarded Dublin Bus and Bus Éireann contracts, this contract includes additional measures to encourage improvements to operational performance at an individual route level.

Light rail services

The Authority has a statutory obligation to secure the provision of light railway passenger services in the Greater Dublin Area (GDA). In September 2014 the Authority, with the Railway Procurement Agency (RPA), now Transport Infrastructure Ireland (TII) jointly entered into a five year contract with Transdev Dublin Light Rail Limited to operate Luas light rail services. In June 2019 the Authority and TII, following a competitive tender process, awarded the Luas Operations and Maintenance (O&M) contract to Transdev Dublin Light Rail Limited.

Statistical qualifications

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 2021 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.

The data provided in this bulletin is based on the public transport operator's periodic and annual returns. The figures used are intended to illustrate broad trends and are not meant to be read as exact calculations. 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. Rounding has also been 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.

Individual routes and services may also change over time, which can impact on passenger and revenue reporting. 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".

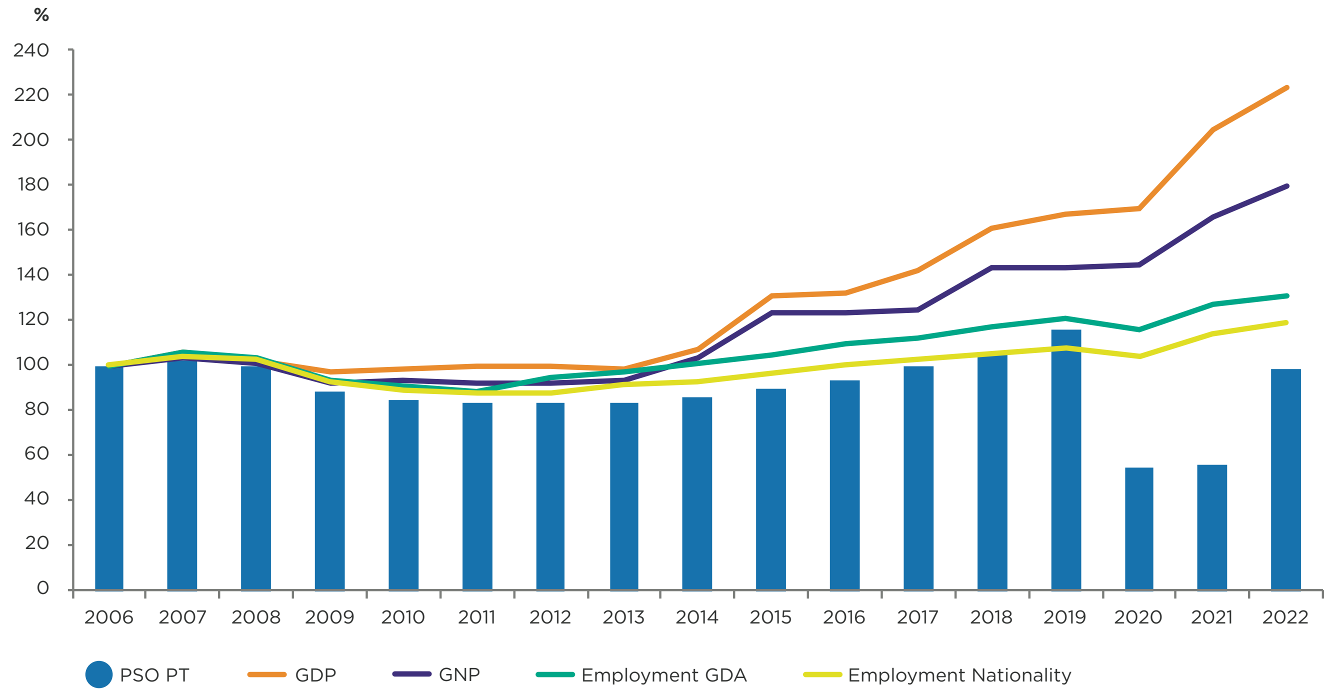
Where reference is made to Dublin Commuter bus services, these comprise of services operated by both Bus Éireann and Go Ahead Ireland. Dublin Bus have also adjusted their services over the years with the approval of the Authority with more cross city and orbital services now. As such, passengers may be able to complete their journey by taking one trip where previously it may have required two trips. As with commuter bus services, where Dublin city bus services are mentioned, these incorporate services operated by both Dublin Bus and Go Ahead Ireland.

1 Total PSO passenger journeys

Economic outlook

Demand for public transport services is normally strongly related to economic activity. Economic growth increases employment, disposable income, and consumer spend, all of which lead to more travel. Economic decline produces the opposite effect. This was clearly demonstrated in the decade prior to the onset of the COVID-19 global pandemic in March 2020 when growth flat lined and employment contracted, before global economies gradually began to reopen from mid-2021 onwards.

Public Transport Usage & Economic Performance (Base Year 2006)



In 2007, passengers travelling by public transport were at a peak. As the first sign of economic decline became evident in 2008 passenger journeys on public transport began to decline, with 2009 seeing reductions in patronage in excess of 10% across all modes of public transport. Total passenger journeys on public transport continued to decline, but at a 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 six years since 2013 growth in total passenger journeys was strong across all modes of PSO funded public transport, growing in excess of 40% to 2019 when we had the highest passenger journeys on PSO services.

The onset of the COVID-19 global pandemic in March 2020 had a significant impact on the use of public transport across all modes in Ireland. Passenger numbers on PSO services initially fell to between 10%-20% of pre COVID levels experienced in the previous year, as reduced timetables were introduced and capacity restrictions imposed across the public transport network. Public health restrictions including social distancing, the mandatory use of face masks on public transport and restrictions on the movement of people within counties and between counties were all introduced at various stages during 2020, with passengers being advised to only travel if their journey was essential and to consider cycling or walking were feasible. 2021 saw a continuation of public health restrictions including the curtailment of capacity on public transport due to social distancing requirements, resulting in minimal growth in overall patronage. This is in contrast with economic performance where the economy has returned to growth following the reopening of global markets, supported by the introduction of various forms of blended and flexible working arrangements. 2022 seen the gradual unwinding of lockdown measures and capacity restrictions in the early part of the year, with patronage returning to pre-pandemic levels by the end of the year, with full year results equating to 85% of 2019 levels across all PSO services.

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 2022.

Table 1A: Annual passenger journeys (millions)

Year / Operator	PSO Bus Services	PSO Rail Services	Light Rail Services	Total PSO Services	Total change compared to previous year
2010	147.6	38.2	27.5	213.4	
2011	145.3	37.4	29.1	211.8	-1.6
2012	143.6	36.7	29.3	209.7	-2.1
2013	142.9	36.7	30.5	210.1	0.4
2014	147.7	37.8	32.6	218.1	8.0
2015	151.8	39.7	34.6	226.1	8.0
2016	159.3	42.8	34.0	236.1	10.1
2017	169.3	45.5	37.6	252.5	16.4
2018	179.2	48.0	41.8	269.0	16.5
2019	196.2	50.1	48.3	294.6	25.6
2020	100.6	17.9	19.2	137.7	-156.9
2021	103.7	17.4	19.5	140.5	2.9
2022	175.2	35.8	38.7	249.7	109.2

Table 1B: Annual passenger journeys (% Change)

Year / Operator	PSO Bus Services	PSO Rail Services	Light Rail Services	Total percentage change compared to previous year
2011	-1.6%	-2.2%	5.7%	-0.8%
2012	-1.1%	-1.7%	0.8%	-1.0%
2013	-0.5%	0.0%	4.1%	0.2%
2014	3.4%	2.9%	6.9%	3.8%
2015	2.8%	4.9%	6.1%	3.6%
2016	4.9%	7.9%	-1.6%	4.4%
2017	6.3%	6.3%	10.6%	6.9%
2018	5.8%	5.4%	11.1%	6.5%
2019	9.5%	4.4%	15.6%	9.5%
2020	-48.7%	-64.3%	-60.3%	-53.3%
2021	3.0%	-2.5%	1.6%	2.1%
2022	69.0%	105.9%	98.5%	77.7%

The data in Table 1A shows the number of passenger journeys carried across each of the main modes of public transport over the period 2010 to 2022. In general the numbers reflect trends in the economy with a fall in passenger journey numbers in 2011. Following a period of stabilisation across all modes, overall passenger journeys began to increase year on year with growth accelerating from 8 million per annum in 2014 to a record increase in excess of 25 million in 2019. As alluded to above, the global pandemic and associated public health related restrictions had a dramatic negative impact on public transport, commencing in March 2020, with minor gains of 2.1% being made in patronage across all modes in 2021, before a significant upturn in 2022.

The Authority has, however, in partnership with bus operators continued to improve the transport network to ensure that a better service can be provided to the travelling public, to meet evolving patterns of travel demand.

In 2021 this included the launch of two phases of the BusConnects Dublin network, namely the H & C spines, resulting in enhanced high frequency bus services as well as new local, and radial routes on the Malahide and Maynooth bus corridors. Pelletstown rail station also became the first new commuter station to open since 2013, improving connectivity on the Maynooth line. The TFI Go App was introduced, providing a convenient way to reduce the need for cash payments on public transport. The TFI 90 minute fare was also introduced, enabling seamless interchange by passengers between bus, DART and Luas services in the Dublin area.

In 2022, the two further phases of the BusConnects programme were delivered namely the North Side Orbital services as well as G Spine services between Red Cow and Liffey Valley to the city centre. Nationally, phase 1 of the Connecting Ireland programme was also delivered, with enhanced rural services. In a bid to boost the return to public transport as a result of a significant increase in the costs of living as the economy emerged from the COVID-19 pandemic, the Authority also implemented the government's 20% cost of living fares reduction across all forms of PSO public transport services in early 2022, in addition to the previously announced Young Adult Card Scheme, offering young people a 50% reduction on equivalent Adult fares. The combination of both measures served to bring patronage levels back close to pre-pandemic levels by the end of the year.

Figure 1.1: Total PSO Passenger Journeys 2010 - 2022 (millions)

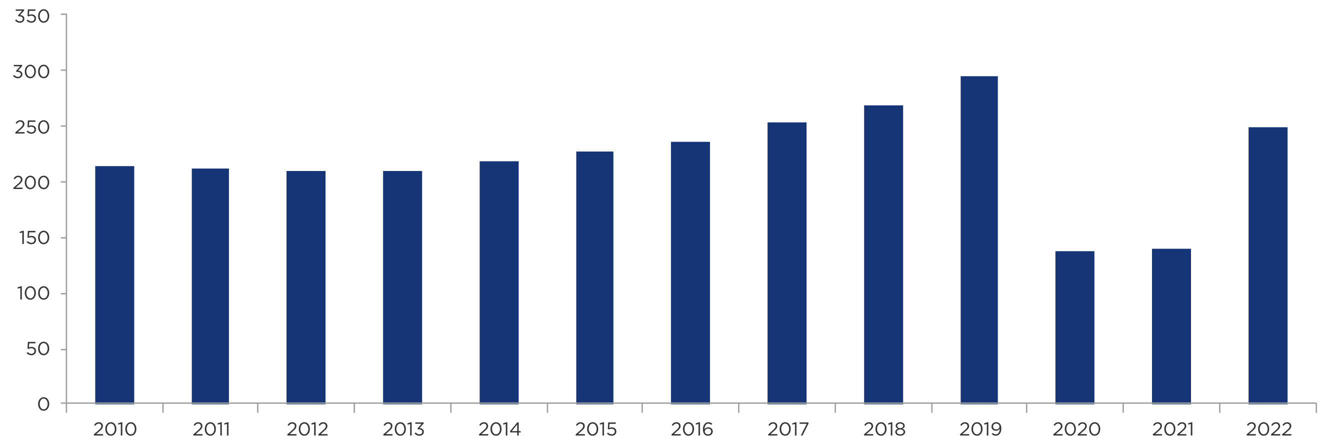


Figure 1.1 shows all PSO passenger journeys combined from 2010 to 2022. This shows that passenger journey numbers declined marginally from 2010 to 2012 as the economy faltered, before stabilising in 2013. There was then a period of consistent growth between 2014 and 2016, averaging 4% annually. 2017 to 2019 saw increasingly greater levels of growth in patronage of between 6.7% and 9.5%, with record passenger numbers in 2019 of just over 294 million. Due to the impact of COVID-19, 2020 saw the largest decreases to date, with overall patronage falling by over half when compared to the previous year, to 137.7 million.

2021 seen marginal gains in patronage, as restrictions continued to curtail a return to public transport until the early months of 2022, before a significant upturn occurred later in the year, bolstered in part by the fares initiatives outlined above.

Figure 1.2: PSO Public Transport Passenger Journeys by Mode, 2010 - 2022 (millions)

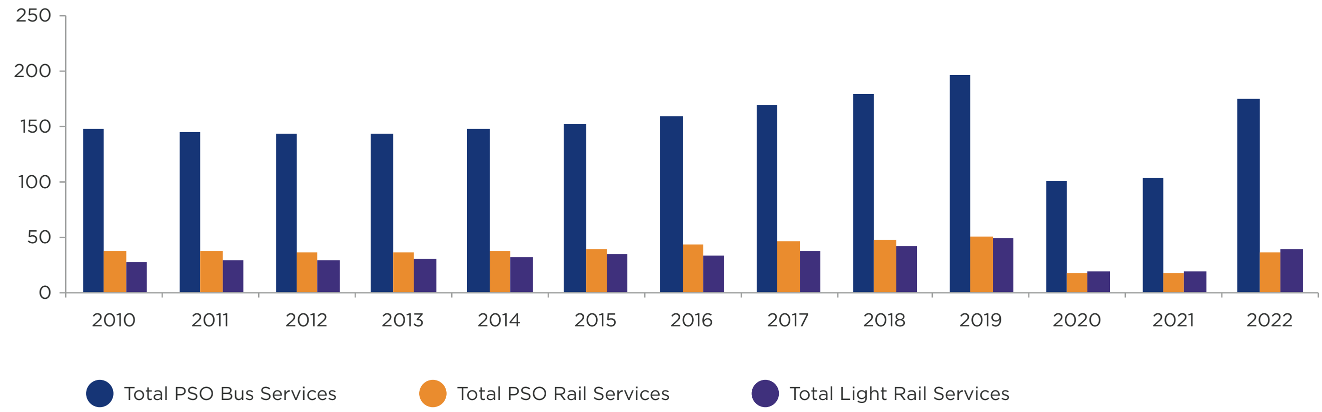


Figure 1.2 shows the total passenger journeys by mode from 2010 to 2022. It is clear from the chart that bus services carry many more passengers nationally than all of the other modes. Despite the impacts of the pandemic, bus services continue to maintain a traditional share of all public transport journeys at approximately 70%, with rail and light rail services accounting for 14% and 16% respectively.

Bus services

Overall patronage on PSO bus services experienced steady growth between 2013 and 2019 for a variety of reasons including improved economic conditions, enhanced services in both recently tendered contracts and in existing direct award contracts, and new bus routes in tendered PSO bus contracts.

Dublin city bus services carry more than half of the total passenger journeys in Ireland (56.1% in 2021 and 53.5% in 2022). Following a number of years of decreases between 2010 and 2013 as a result of the economic downturn, passenger journeys on Dublin city bus services increased by an average of 4.5% each year to 2019, reaching a peak of 152.7 million. In recent years this has been the result of additional services and passenger growth associated with the transfer of services to Go Ahead Ireland, along with the provision of additional services by Dublin Bus. Patronage on Dublin city bus services fell by 49.2% in 2020 and grew modestly by 2.1% in 2021, as a result of continued pandemic related restrictions. The delivery of four phases of the BusConnects programme between 2021 and 2022 has coincided with a significant return to bus services in Dublin city in 2022 following the pandemic, delivering a year on year increase of 69.3%.

PSO bus passenger numbers outside Dublin, predominantly operated by Bus Éireann, saw relatively moderate levels of growth in the years between 2011 and 2017, before patronage grew in excess of 13% in 2018 and 2019 (reaching 39.9 million journeys in 2019) following investment by the Authority in additional services and improved frequencies. Similar to all other PSO services, patronage fell by almost half to 20.0 million in 2020 before moderate gains of 7% were experienced in 2021, boosted by growth in regional cities. 2022 continued in the same vein with impressive increases in patronage of 66.9% over the year.

Rural bus services provided and managed by Local Link have seen annual passenger journeys rise gradually over the years, albeit on a much smaller scale to that of the larger operators. Increases before 2018 were partially due to new reporting methods that saw the inclusion of passengers on additional contracted services being included. In 2018, Local Link saw strong growth of 19.6% in passenger journeys, their best year since 2011. This was mainly as a result of the introduction of over 50 new services since 2016. Strong growth continued in 2019 before the pandemic resulted in a decline in patronage of 45.1% in 2020. 2021, however, seen an encouraging return to growth with 9.2% on the previous year, despite ongoing public health restrictions. 2022 seen even an even greater return following the first roll out of Connecting Ireland services, resulting in year on year growth of some 85.7%.

Rail services

Rail services operated by Iarnród Éireann had an average growth in patronage of 5.3% between 2014 and 2019, reaching 50.1 million passenger journeys in 2019, which represented a new record level. This was supported by the introduction of a 10-minute Dart service in the latter part of 2018 as well as service enhancements on Intercity and commuter services, providing additional capacity. Rail services, particularly Dublin Commuter and Dart services, suffered the most significant downturn in 2020 of all modes, with a 64% decrease in patronage as a result of the pandemic.

2021 saw a further decline in patronage of -2.5% as significant numbers of commuters continued to work from home. Subsequently, as the economy emerged from the pandemic in early 2022 the most pronounced upturn in patronage across all the modes was seen on rail services, which experienced a 105.9% increase compared to the previous year.

Light rail services

Passenger journeys on Luas services operated by Transdev Dublin Light Rail Limited have largely followed the pattern of other operators with patronage trending upwards until 2019. Increased patronage on this mode was aided by the opening of extensions to both the Green Line and the Red Line between December 2009 and July 2011. The upward trend in patronage was to continue until 2019, where a 15.6% increase saw 48.3 million passenger journeys. The opening of Luas CrossCity on 9th December 2017 undoubtedly influenced the growth of passenger journeys, combined with the introduction of new extended trams on the Green Line in 2019, providing extra passenger capacity. Like other operators, however, the pandemic in 2020 resulted in a steep decline in passenger numbers of 60.3% in 2020, as passengers were advised to avoid public transport unless for essential purposes, with figures for 2021 resulting in a marginal return to light rail services of 1.6%. In line with that seen on heavy rail services, light rail services seen a marked return to growth in 2022 as the capital emerged from sustained periods of lockdown in early 2022, with the second highest annual growth of 98.5%.

Factors influencing passenger journeys

From time to time Public transport operators, with the agreement of the Authority review their reporting methodologies to provide more accurate data on their services. 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 restated their 2013 passenger journeys while Iarnród Éireann restated their 2012 passenger journeys. While restatements result in a slight adjustment to the comparison between one year and the next, they do not affect the overall trend in passenger journey growth over a number of years.

In any year, particular events may affect passenger numbers on one or more operators. One such event is industrial action, which has affected the main operators (Dublin Bus, Bus Éireann, Iarnród Éireann and Luas) to varying degrees between 2013 and 2017. Weather events can also affect passenger numbers. 2017 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 by 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 heavy snow and the cancellation of services over a number of days.

March 2020 saw the onset of the COVID-19 global pandemic, which had a dramatic negative impact on the uptake of public transport. Patronage shrank by as much as 80%-90% in the early stages of the pandemic, with government imposed travel restrictions, reduced timetables and capacity restrictions imposed, and with health guidance requiring adequate social distancing and mandatory use of face masks. The significant decreases in the use of public transport resulted in substantial revenue losses, which was absorbed by additional funding from Government to ensure services continued to operate in line with public health restrictions, which continued to varying degrees for large parts of 2021 and early 2022.

2 PSO passenger journeys by region

Dublin city bus services are operated by Dublin Bus and Go Ahead Ireland. While they mainly operate within Dublin city & county some services also operate in North Kildare and North Wicklow. In addition to city bus services, commuter bus services operate into Dublin from surrounding counties. These services are operated by Bus Éireann and Go Ahead Ireland. Light rail (Luas) services in Dublin are operated by Transdev Dublin Light Rail Limited and DART and commuter rail services are operated by Iarnród Éireann.

Bus services operated by Bus Éireann provide services to all 26 counties, and similar to that of Iarnród Éireann, offer services to Northern Ireland. Rural bus services operated under the Local Link programme operate in all 26 counties with a small number of services extending into Northern Ireland. Rail services operated by Iarnród Éireann provide services to 23 of 26 counties and services to Northern Ireland.

The tables below present passenger journeys in the Dublin region, the Greater Cork City region, Galway, Limerick and Waterford cities, and the rest of the country, including stage carriage bus services (serving areas outside larger towns and cities) operated by Bus Éireann and Intercity rail services operated by Iarnród Éireann.

Dublin Region

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

Year/ Operator	Dublin City Bus Services	Dublin Commuter Bus Services	Dublin Commuter & Dart Rail Services	Luas Light Rail Services	Total Passenger Journeys
2013	112.5	4.9	25.9	30.5	173.8
2014	116.3	5.0	26.5	32.6	180.4
2015	119.8	5.1	28.1	34.6	187.6
2016	125.4	5.5	30.9	34.0	195.8
2017	136.3	5.1	32.8	37.6	211.7
2018	141.5	5.9	34.2	41.8	223.4
2019	152.7	6.6	35.6	48.3	243.2
2020	77.6	3.4	12.82	19.2	113.0
2021	78.9	3.8	11.83	19.5	114.0
2022	133.5	6.8	24.68	38.7	203.7

Table 2A shows trends in passenger journeys for the Dublin region. In the period between 2013 and 2019 total passenger journeys in the region grew by just under 40% to a total of 243.2 million, before the onset of the pandemic in 2020, resulting in a decline of 129.3 million.

Patronage in the Dublin region in 2021 was largely similar to that of 2020, with ongoing restrictions impacting heavily on the use of public transport in the capital. 2021 was noteworthy in relation to a decline of approximately one million passengers on Dublin commuter rail and Dart services reflecting government advice for commuters to work at home.

This subsequently, has been the most prominent factor by way of a return to public transport in the capital city in 2022, as a gradual reopening of the economy in the early part of the year has undoubtedly been the catalyst for an additional 13.5 million passenger journeys on commuter rail and bus services during the year. Dublin city bus services, however, who traditionally account for the most passenger journeys, seen an additional 51.1 million passenger journeys in 2022 and thereby accounting for the most significant shift in numerical terms.

Table 2B: Dublin Region Annual Passenger Journeys (% Growth)

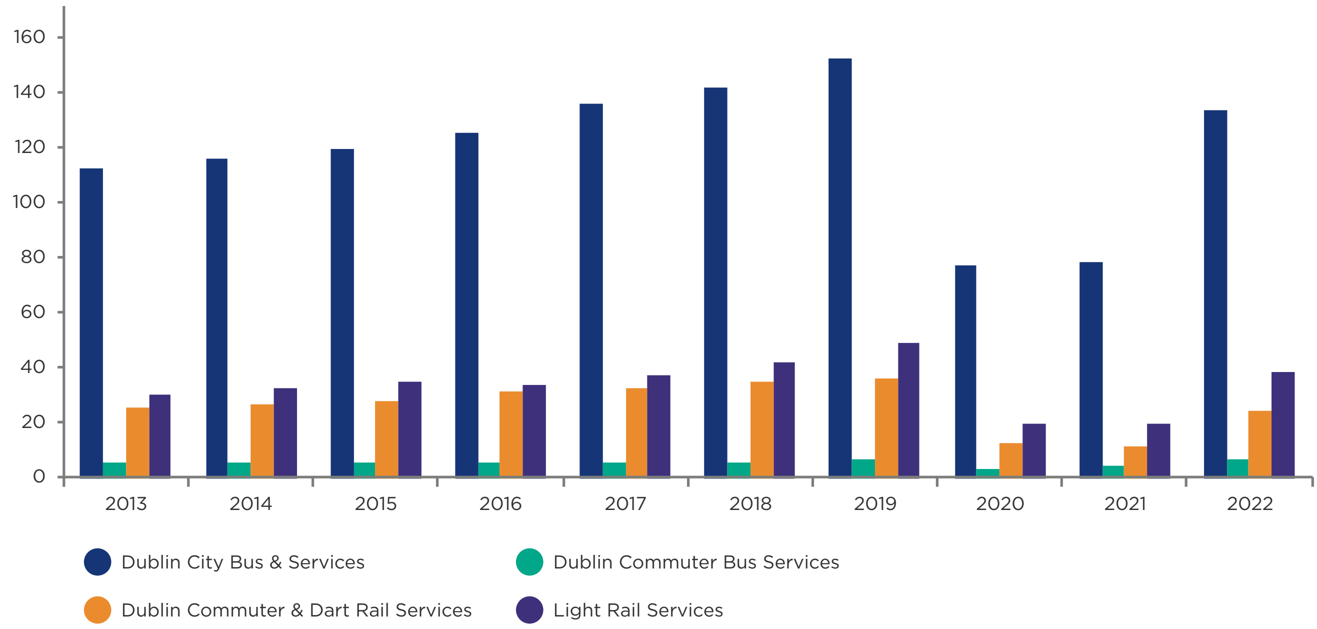
Year/ Operator	Dublin City Bus Services	Dublin Commuter Bus Services	Dublin Commuter & Dart Rail Services	Luas Light Rail Services	Total Passenger Journeys
2013 to 2019	35.8%	34.4%	37.1%	58.5%	39.9%
2019 to 2022	-12.6%	3.2%	-30.6%	-20.0%	-16.3%

As alluded to above, in the period between 2013 and 2019, patronage across all modes in the Dublin region grew by just under 40%. Table 2B also shows the change in passenger demand per mode between 2019 and 2022 when from March 2020 public transport was significantly impacted by the COVID-19 pandemic. In overall terms, the pandemic resulted in demand for public transport shrinking by just over half between its peak in 2019 compared to the following year, however by the end of 2022, passenger journeys had recovered significantly, being just 16.3% lower than the previous record level.

The step change in patronage in early 2022, when the economy began to emerge from the pandemic, which was particularly prevalent in the Dublin region with Dublin city bus services and commuter bus services showing marked upturns in demand, with the latter almost back to pre-covid patronage levels.

Figure 2.1 highlights the very high modal share for bus services in the Dublin region from 2013 to 2022. Despite the downturn experienced in the last two years, demand for bus services continues to be significantly greater than that of other modes.

Figure 2.1: Dublin Region Annual PSO Passenger Journeys (millions)



Cork city commuter area

Table 2C and Figure 2.2 show the passenger journeys using PSO subsidised public transport in Cork city commuter area. 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 has traditionally been significant. The Dublin region typically has approximately 14 passenger journeys on public transport for every one passenger journey in Cork. This has remained the case in 2022 where there were 14.0 million passenger journeys in the Cork commuter area, compared to 203.7 million in the Dublin region. Bus users accounted for 91.6% of public transport journeys in Cork in 2019 and 90.3% in 2022.

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

Year/ Operator	Bus Services	Rail Services	Total Passenger Journeys
2013	10.5	0.9	11.5
2014	11.0	1.1	12.1
2015	11.7	1.1	12.9
2016	12.6	1.2	13.8
2017	12.1	1.3	13.4
2018	13.9	1.3	15.3
2019	15.9	1.5	17.3
2020	7.9	0.6	8.5
2021	8.0	0.6	8.6
2022	12.7	1.4	14.0

Figure 2.2: Cork Commuter Annual PSO Passenger Journeys (millions)

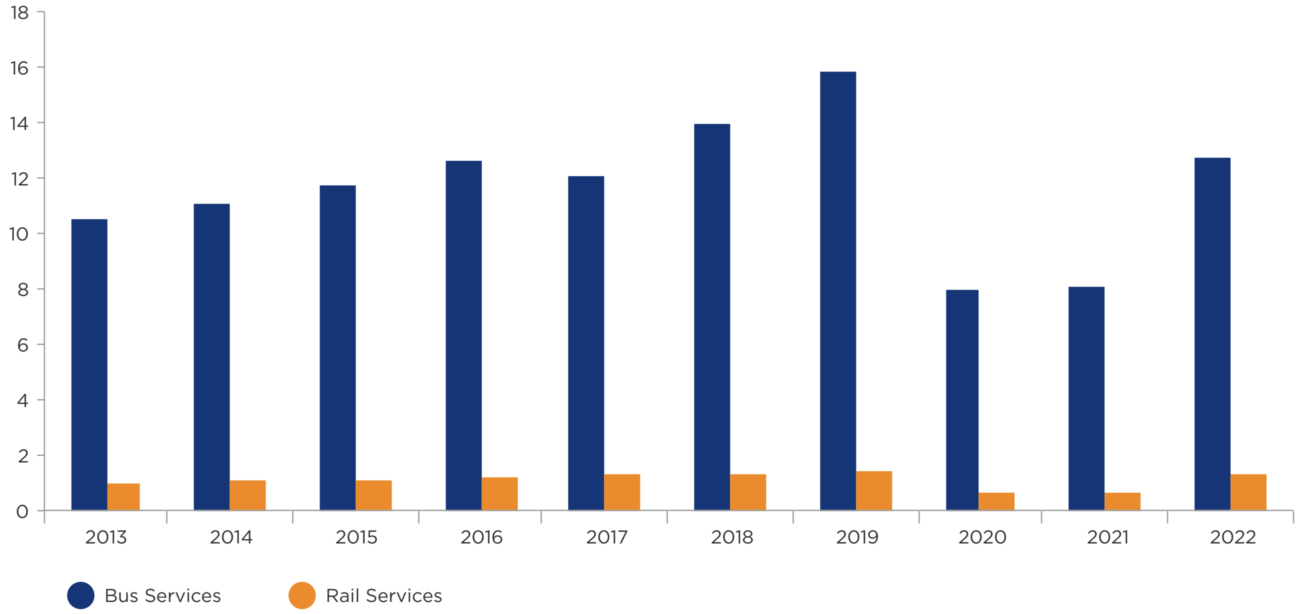


Table 2D: Cork Annual Passenger Journeys (% Change)

Year/ Operator	Bus Services	Rail Services	Total Passenger Journeys
2013 to 2019	50.6%	55.6%	51.0%
2019 to 2022	-20.2%	-6.6%	-19.0%

Table 2D shows the change in passenger journeys between 2013 and 2019 and also 2019 and 2022. Patronage up to 2019 had been increasing steadily, with the reconfiguration of the city network contributing to growth in excess of 50% across both main public transport modes.

In line with trends seen in Dublin and nationally, patronage in the Cork region in 2022 has returned to within 20% of where it was in its peak in 2019. This has been particularly pronounced on rail services as passengers have returned in significant numbers to Cork city as the local economy began to fully re-emerge from the pandemic.

Other cities and rural services

Table 2E and Figure 2.3 show trends in passenger numbers on services outside the Dublin and Cork commuter regions.

Table 2E: Annual Passenger Journeys outside Dublin and Cork regions (millions)

Year/ Operator	Bus Services Galway city	Bus Services Limerick city	Bus Services Waterford city	National Bus Services	Intercity Rail Services	Rural Bus Services (Local Link)	Total
2013	3.8	2.8	0.8	4.2	9.9	1.7	23.3
2014	4.1	2.8	0.8	4.1	10.2	1.8	23.9
2015	4.0	2.8	0.8	4.1	10.4	1.8	23.9
2016	4.2	2.9	0.8	4.2	10.7	1.8	24.7
2017	4.2	3.2	0.8	4.2	11.4	1.9	25.6
2018	4.7	3.5	0.8	5.2	12.4	2.3	28.9
2019	5.7	3.9	1.2	5.8	13.1	2.5	32.3
2020	3.0	2.3	0.7	2.8	4.4	1.4	14.7
2021	3.3	2.6	0.8	3.3	5.0	1.5	16.5
2022	5.6	4.3	1.2	5.7	9.8	2.8	29.5

Total passenger journeys on these services increased year on year from 2013 and reached 32.3 million in 2019, before 2020 saw a decline of over 50% to 14.7 million. The position recovered somewhat more positively outside of Dublin and Cork in 2021 with a 12.6% increase in patronage, and then mirroring the picture seen nationally in 2022 with a 78.4% increase. Bus services within the other regional cities accounted for 37.8% of travel outside of Dublin and Cork in 2022, while Intercity rail services carried approximately 33.3% of these passengers. National stage carriage bus services and rural bus services operated under the Local Link brand carried the balance of passenger journeys.

Table 2F: Annual Passenger Journeys Outside Dublin and Cork regions (% Change)

Year/ Operator	Bus Services Galway city	Bus Services Limerick city	Bus Services Waterford city	National Bus Services	Intercity Rail Services	Rural Bus Services (Local Link)	Total
2013 to 2019	48.1%	42.9%	49.2%	37.5%	32.1%	46.2%	38.6%
2019 to 2022	-0.5%	9.6%	-3.5%	-2.2%	-24.9%	11.3%	-8.6%

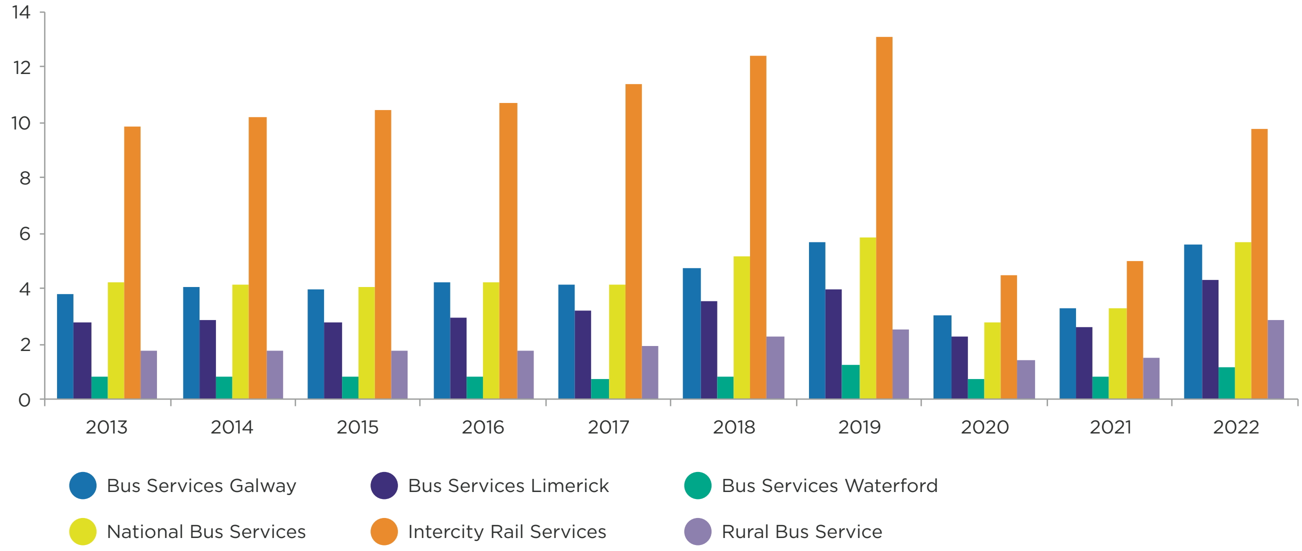
Passenger journeys outside of Dublin and Cork increased by similar margins between 2013 and 2019, averaging 38.6% across all modes. The upturn in demand on bus services in the regional cities was in part helped by the introduction of enhanced timetables in Galway, Limerick and Waterford and the promotion of Leap in the years up to 2019.

As with the Dublin and Cork city areas, the use of public transport fell dramatically across other regional cities and elsewhere nationally in 2020, with passenger numbers decreasing by over 54%. As discussed above, the position in 2022 seen a marked return to growth with all other markets increasing patronage by between 53.0% (Waterford city bus services) and 96.7% (Intercity rail services).

This has resulted in the overall picture seeing passenger demand return to within 8.6% of the record highs of 2019, demonstrating a remarkable return to growth outside of the Dublin and Cork areas.

In numerical terms, Intercity rail services account for the most significant sector outside of Dublin and Cork. Demand on these services grew steadily between 2013 and 2019 (32.1%) before seeing a dramatic decrease in 2020, with passenger demand 55.0% less than that seen seven years previous. And whilst demand having only reaching a level which is approximately a quarter less than that seen in the peak of 2019, patronage has recovered strongly in 2022, adding almost 5 million passenger journeys, a trajectory which if it continues in the incoming year will see this sector return to pre pandemic levels in a relatively short period of time.

Figure 2.3: Annual PSO Passenger Journeys outside Dublin and Cork regions (millions)



When looking at the change in passenger journeys between 2013 and 2022 the following observations can be made:

- Growth between 2013 and 2019 was strong across all market segments, with an average increase of 38.6%. Following a decline of 36.9% in 2020, a relative recovery was made in 2021 (-29.0%) before this deficit was essentially reversed with a resurgence in 2022 (+26.7%).
- Intercity rail services carry the largest share of passengers outside of the Dublin and Cork areas, with 13.1 million passenger journeys in 2019, increasing from 4.4 in 2020 back to 9.8 million in 2022 with the single largest return to growth.
- Rural bus services typically carry much smaller cohorts of passengers across the country, however with the launch of Connecting Ireland in 2022 has experienced the second highest year on year growth of 85.7% in 2022.
- National bus services (stage carriage) experienced strong growth up to 2019, accounting for 5.8 million passenger journeys in that year, before falling to 2.8 million in 2020. This market has seen the third most prominent growth rate in 2022, with 5.7 million passenger journeys recorded compared to 2021 (+73.3%).
- Bus services in Galway, Limerick and Waterford also increased patronage further in 2022 by an average of 62.3% compared to 10.7% the year before, suggesting that performance has been relatively positive across the board as the country has emerged from the pandemic and prolonged periods of restrictions on public transport provision in the previous two years.

Figure 2.4 illustrates the change in passenger demand across all sectors between 2021 and 2022. Whilst the impact of the COVID-19 pandemic has significantly impacted on the use of public transport services since early 2020, the results below demonstrate the relative changes within individual public transport markets since that time, as the usage of public transport had almost fully recovered by the end of 2022.

Following initial declines observed in 2020, some markets continued to remain supressed in patronage terms in 2021 such as Dublin Commuter & Dart services as well as Commuter rail services in Cork, demonstrating that large cohorts of passengers continued to observe government guidance to work from home for large parts of that year. What we can clearly observe however is that in 2022, these markets have led the way in percentage terms towards a recovery in the use of public transport services across the country.

Indeed all markets grew in 2022 by in excess of 50% compared to the previous year, which is a quite remarkable return to relative normality given that certain practices such as remote and hybrid working are now seen as the norm for some cohorts of workers across the country. It does however indicate that initiatives such as the cost of living fares reduction, Young Adult fares and ongoing enhancements to the public transport network have encouraged passengers to avail of these services once again.

Figure 2.4: PSO Passenger Journey by Sector 2021 to 2022 (% Change)

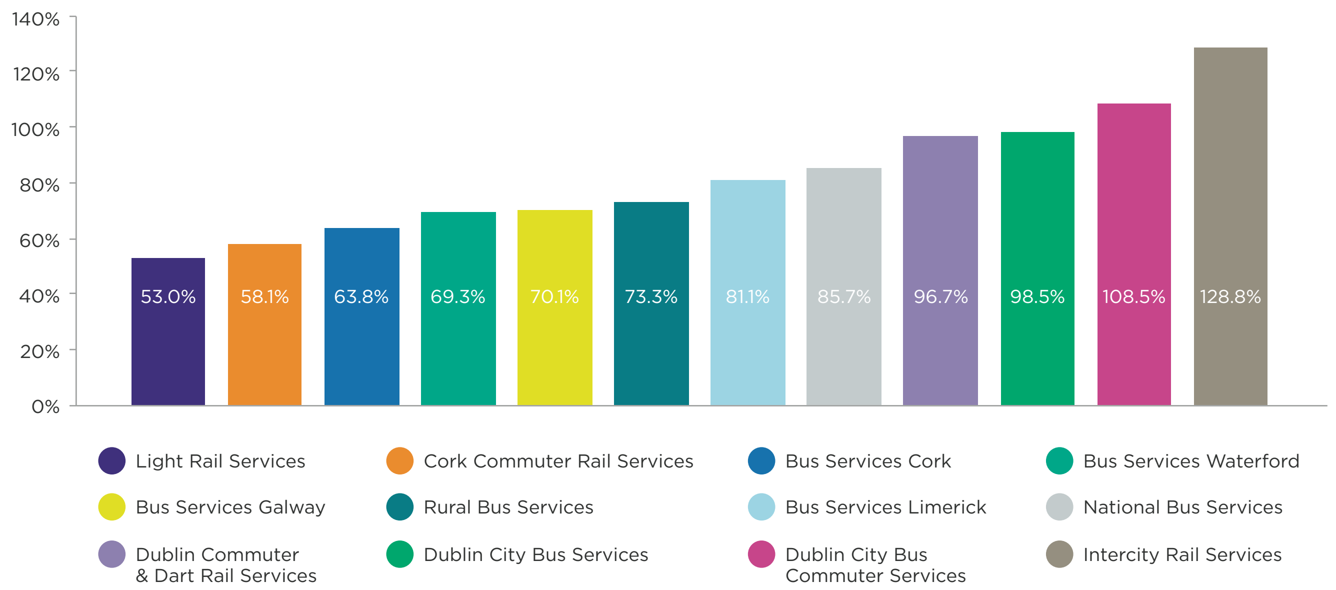


Figure 2.5: PSO Passenger Journeys by Region 2022

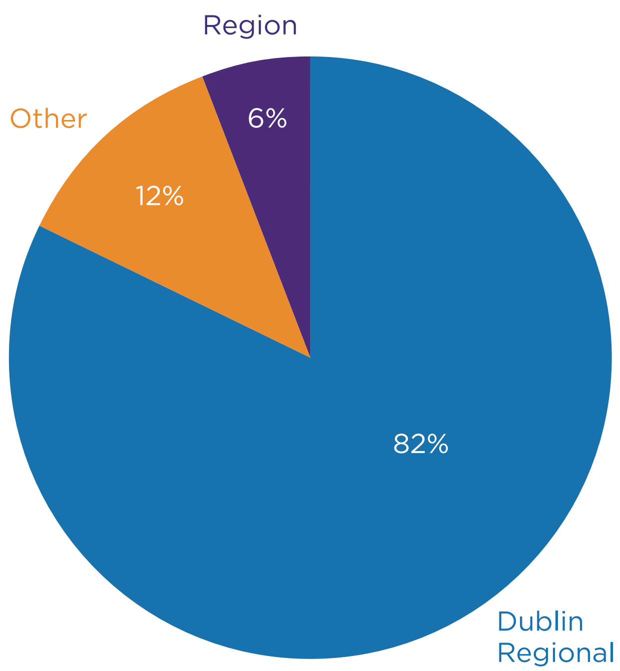


Figure 2.5 shows all passenger journeys in 2022 broken down into three regions: the Dublin region, the Cork region and the rest of Ireland. The trend in 2022 remained similar to previous years with the Dublin region accounting for 82% of all PSO public transport journeys. The Cork region accounts for 6% of all passenger journeys while the rest of Ireland accounts for 12% of all passenger journeys.

3

Total operated vehicle-kilometres and vehicle seat-kilometres

The changes in both operated vehicle-kilometres and vehicle seat-kilometres operated across the three main public transport modes in the State are shown in Tables 3A to 3D along with Figure 3.1.

'*Operated vehicle-kilometres*' refers to the actual amount of vehicle kilometres that a bus or rail operator has operated in a given period, as opposed to 'scheduled vehicle kilometres' which indicates the number of vehicle kilometres planned to operate according to operator timetables.

'*Vehicle seat-kilometres*' is a unit of passenger transport capacity measuring the average number of seats available on each vehicle multiplied by the total kilometres travelled by all vehicles operating PSO services.

Given that transport operators operate a variety of vehicles with differing numbers of seats, vehicle seat-kilometres can be instructive in illustrating 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. Commuter and Dart rail services in particular offer significant standing capacity on their vehicles and this standing capacity is not included in the vehicle seat kilometres outlined here. Light rail trams have an average of 70 seats per tram with total capacity including standing of 310. As most light rail passengers travel relatively short journeys many of them are required to stand for their journey. Therefore for light rail services the vehicle seat-kilometres includes both seating and standing capacity on their trams.

Factors affecting operated vehicle and seat kilometres

In 2017 both vehicle kilometres and seat kilometres on rail services decreased by 5.7% and 4.0% respectively as a result of industrial action by Iarnród Éireann staff, as well as train cancellations due to knock on effects of Bus Éireann industrial action. Services were also impacted due to ex- hurricane Ophelia.

Bus Éireann changed their method used to calculate kilometres operated in 2013 and 2014 and these figures have been restated. As a result, 2013 and 2014 vehicle kilometres operated are not directly comparable with previous years. Seat kilometres operated have also been restated from 2010 to 2019 to reflect average seat numbers on PSO services.

Operated vehicle kilometres provided by Dublin Bus have also been restated from 2010 to 2019 to reflect revenue generating PSO kilometres as opposed to company operated kilometres, with figures between 2010 and 2013 being approximations based on average seat numbers using the revised methodology.

During certain periods of 2021, the Authority agreed reductions in planned vehicle kilometres with operators to reflect reduced transport demand due to the Covid-19 pandemic and to help maximise delivery of planned services when the risk of Covid-19 related staff absence was elevated. The full year effects of Covid-19 related staff absences contributed to relatively high levels of Lost Kilometres at times during 2021.

In 2022, the reductions in planned kilometres were unwound, helping to cater for the increased demand for travel compared to the pandemic-affected periods of 2020 and 2021. However, bus driver shortages were experienced by all operators during 2022, mirroring shortages in many areas of the national economy. This impacted the number of kilometres that could be operated during certain periods of the year.

Bus services

In general terms, both vehicle-kilometres and vehicle seat-kilometres trended downwards between 2010 and 2014 as passenger journeys fell following economic decline, before stablishing thereafter. The two main bus operators have operated increased vehicle kilometres in recent years, as demand for services has increased and additional services are provided by the Authority.

In 2018, Dublin Bus figures receded somewhat owing to a small portion of services being transferred to Go Ahead Ireland, and also extreme weather events earlier in the year. The tendering of bus services in conjunction with the introduction of other new services nationally led to sustained growth in overall vehicle kilometres operated and seat kilometres in both 2018 and in 2019. This trend has continued on Dublin city bus services up to 2022 with increases seen across both metrics, as service improvements such as the introduction of a number of 24-hour and BusConnects services helping to mitigate the impacts of both the COVID-19 pandemic and associated driver shortages.

Bus Éireann also experienced gains in both metrics between 2015 and 2019 owing to enhanced service delivery by the Authority outside the Dublin region, with supporting marketing campaigns towards the use of leap. Vehicle seat kilometres increased steadily over the years as a result of bus capacities increasing, allowing them to carry more passengers with the same number of services operated. Both operated kilometres and seat kilometres declined marginally in 2020 as services restrictions were introduced nationally, before rebounding in 2021 by 7.7% in operated km's and 10.87% in seat km's reflecting improved performance that has been seen outside of Dublin and Cork. Both metrics improved further in 2022 with ongoing service enhancements nationwide assisting in this regard.

Light rail Services

Vehicle-kilometres operated on light rail services 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 was 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 the years from 2017 to 2019 Luas benefitted from strong growth in passenger journeys. A key contributory factor to the increases in both kilometres operated and seat-kilometres was the opening of the Luas Cross City extension on the Green line in December 2017 and the introduction of extended trams, also on the Green line, further bolstering capacity. Luas services saw the lowest drop off in terms of kilometres operated and seat kilometres across the modes in 2020 with no significant pandemic related service reductions, however marginal decreases across both metrics in 2021 and 2022 is more likely to have been a result of performance related lost kilometres.

Rail Services

Operated vehicle kilometres on rail services have remained relatively 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. The introduction of a 10 minute Dart service in late 2018 and enhancements on Intercity and Commuter services to and from Dublin and Galway in 2019 resulted in operated kilometre increases of 9.2% and 6.6% in seat kilometres in 2019. Perhaps not surprisingly, the pandemic in 2020 impacted the provision of rail services most significantly of all the modes, as restrictions on the use of public transport altered the travel patterns of regular commuters dramatically. Rail services have, however, rebounded somewhat in 2021 and to an even greater extent in 2022 owing to restored provision on intercity services.

Table 3A: Annual operated vehicle kilometres (millions)

Year / Operator	PSO Bus Services	PSO Rail Services	Light Rail Service	Total	Total Annual Change
2010	87.0	15.950	2.9	105.8	
2011	84.2	15.960	3.7	103.8	-2.0
2012	82.4	15.960	3.8	102.2	-1.6
2013	76.8	15.967	3.5	96.3	-5.9
2014	80.3	15.965	3.7	100.0	3.7
2015	81.2	15.965	3.7	100.8	0.9
2016	82.9	16.0	3.5	102.3	1.5
2017	84.2	15.0	3.7	102.9	0.5
2018	91.0	16.2	4.1	111.3	8.4
2019	98.7	17.7	4.4	120.8	9.5
2020	102.6	14.7	4.3	121.7	0.9
2021	106.1	15.7	4.2	125.9	4.2
2022	109.8	17.6	4.1	131.5	5.6

Table 3B: Annual operated vehicle kilometres (% Change)

Year/Operator	PSO Bus Services	PSO Rail Services	Light Rail Services	Total Annual Percentage Change
2011	-3.2%	0.1%	27.3%	-1.9%
2012	-2.1%	0.0%	4.0%	-1.6%
2013	-6.8%	0.0%	-7.6%	-5.8%
2014	4.6%	0.0%	3.5%	3.8%
2015	1.1%	0.0%	-0.1%	0.9%
2016	2.1%	-0.1%	-4.7%	1.5%
2017	1.5%	-5.7%	4.9%	0.5%
2018	8.1%	7.7%	11.0%	8.2%
2019	8.5%	9.0%	8.0%	8.5%
2020	4.0%	-16.6%	-1.5%	0.8%
2021	3.3%	6.5%	-3.7%	3.5%
2022	3.5%	12.1%	-0.8%	4.4%
2010 to 2022	26.2%	10.3%	42.6%	24.2%

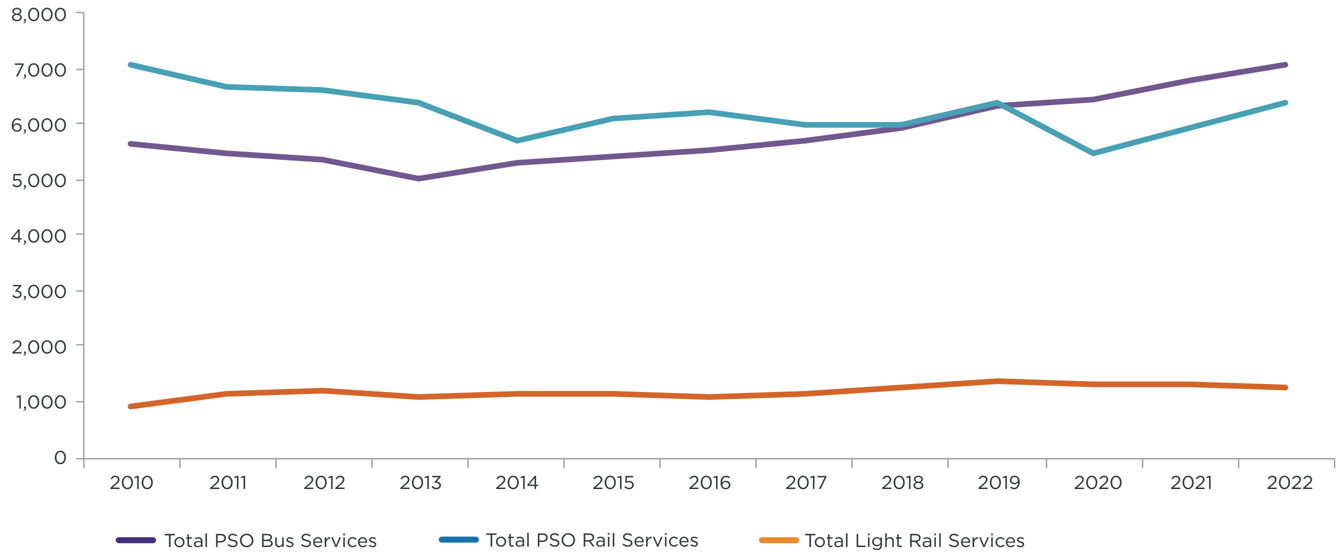
Table 3C: Annual operated vehicle seat kilometres (millions)

Year / Operator	PSO Bus Services (seats only)	PSO Rail Services (seats only)	Light Rail Services (Seated and standing)	Total	Total Annual Change
2010	5,633.8	7,063.1	898.4	13,595.3	
2011	5,450.7	6,677.6	1,143.1	13,271.3	-323.9
2012	5,349.9	6,623.0	1,188.9	13,161.9	-109.5
2013	5,021.5	6,398.0	1,098.8	12,518.3	-643.6
2014	5,294.0	5,707.0	1,137.0	12,138.0	-380.3
2015	5,410.5	6,123.2	1,135.8	12,669.5	531.5
2016	5,499.7	6,208.3	1,081.9	12,789.9	120.4
2017	5,709.7	5,961.4	1,134.9	12,806.0	16.1
2018	5,944.2	5,986.6	1,260.3	13,191.1	385.1
2019	6,322.3	6,379.1	1,363.4	14,064.8	873.6
2020	6,457.4	5,448.7	1,339.9	13,246.0	-818.8
2021	6,759.5	5,901.9	1,290.8	13,952.2	706.2
2022	7,077.8	6,385.3	1,280.5	14,743.5	791.4

Table 3D: Annual operated vehicle seat kilometres (% Change)

Year/Operator	PSO Bus Services	PSO Rail Services	Light Rail Services	Total Annual Percentage Change
2011	-3.3%	-5.5%	27.2%	-2.4%
2012	-1.8%	-0.8%	4.0%	-0.8%
2013	-6.1%	3.7%	-7.6%	-4.9%
2014	-2.8%	-10.8%	3.5%	-3.0%
2015	2.2%	7.3%	-0.1%	4.4%
2016	1.6%	1.4%	-4.7%	0.9%
2017	3.8%	-4.0%	4.9%	0.1%
2018	4.1%	0.4%	11.0%	3.0%
2019	6.4%	6.6%	8.2%	6.6%
2020	2.1%	-14.6%	-1.7%	-5.8%
2021	4.7%	8.3%	-3.7%	5.3%
2022	4.7%	8.2%	-0.8%	5.7%
2010 to 2022	25.6%	-9.6%	42.5%	8.4%

Figure 3.1: Annual Vehicle Seat Kilometres Operated 2010 - 2022



4 Passenger revenues

Passenger revenues across each of the modes of public transport are shown in Table 4A. Passenger revenues for bus, rail and light rail services 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 Social Protection (DSP). Revenues for rural bus services operated by Local Link also includes revenue which is paid to Local Link from agencies such as the Health Service Executive (HSE) or from community groups for the provision of specific bus services.

Passenger revenues reported in this chapter 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. Bus Éireann Expressway services).

Changes in passenger revenues is as a result of associated rises or falls in passenger journeys or average fares, or both. As the use of Leap e-purse has grown across the modes it has had the effect of moderating passenger revenue growth due to the significant fares discounts available. The Free Travel Grant from DSP has increased very little since 2010 despite significant increases in free travel passengers, which also has a moderating effect on the growth in passenger revenues. 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. Between 2014 and 2019 average fare increases were moderate and it was growth in passenger journeys which was the main contributor to passenger revenue growth.

Owing largely to the COVID-19 pandemic there were no fare changes in 2020 or 2021 other than the introduction of the 90 minute fare in the Dublin metropolitan area.

The 90 minute fare allows for free transfer between different transport modes within 90 minutes of initial tag on, which in itself is revenue diluting, however this impact was difficult to ascertain during sustained periods of capacity restrictions across the PSO network in 2020 and 2021.

While record passenger journeys resulted in revenues across all modes increase by 6.8% in 2019, the onset of the COVID-19 global pandemic in March 2020 brought about the single most detrimental impact on fare revenues to date, with a year on year decline of -51.2%, from €660.3 million to €322.5 million. 2021 saw a modest increase in passenger revenues as government restrictions continued to heavily impact on the use of public transport, resulting in a 1.9% increase from the previous year (€328.7 million). 2022 seen an encouraging recovery with revenues increasing by 41.4% to €466.7 million compared to 2021, as restrictions had largely been removed by the early part of the year.

Due to the significant impact of increased costs of living as the economy emerged from the COVID-19 pandemic, the Authority implemented the government's 20% cost of living fares reduction across all forms of PSO public transport services in early 2022, in addition to the previously announced Young Adult Card Scheme, offering young people a 50% reduction on equivalent Adult fares. The combination of these measures impacted on revenues in 2022, despite patronage returning close to pre pandemic levels by the end of the year.

Bus services

Passenger revenues on bus services nationally rose consistently by an average of 5.7% in the years from 2012 through to 2019. This was primarily driven by significant increases in passenger journeys, to a peak in 2019 where of a total passenger revenue of €661.8 million, bus services contributed €347 million (52.4%). Bus revenues fell by 45.6% in 2020, however maintained their share of overall PSO passenger revenue.

Of the three modes, passenger revenue on bus services was the only mode to see an increase in 2021, increasing by 4.4% to €197.2 million, with a further 27.7% increase in 2022 to €251.8 million.

Typically, just over two thirds of total bus passenger revenues are generated by bus services in Dublin city, peaking at €247 million in 2019 before receding to €130.1 million in 2020 and recovering to €170.4 million in 2022. Significant revenue growth occurred in 2018 and 2019 associated with the tendering of bus services and subsequently since 2021 via the introduction of enhanced services as part of the Bus Connects programme.

Passenger revenues for bus services outside Dublin peaked in 2019, resulting in a revenue total of €67.2 million for the year. This was despite the full roll out of Leap-enabled machines across the network providing lower leap fares and reflected strong passenger growth, particularly in the regional cities and on national stage carriage services. In line with other services, bus revenues outside of Dublin declined by 39.2% in 2020 to €40.9 million as a result of the impact of the pandemic. However, bus services in regional cities have showed the strongest return to growth across all PSO services in 2021 with fare revenue rising by an average of 14%, followed by second year on year increase of 26.5% in 2022 reaching €56.9 million.

The introduction of a number of high frequency services across the Local Link network from 2017 onwards has resulted in a significant upturn in passenger revenues, increasing from €1.9 million in 2017 to €3.3 million in 2019, as demand for these services grew, before receding to €3.0 million in 2020. In line with regional cities, rural services also experienced a return to growth of 7.3% in 2021, as service levels gradually return to pre pandemic norms. In 2022, rural service provision has expanded further with the introduction of new and enhanced existing services through the Connecting Ireland programme, bolstering passenger revenues and resulting in year on year increase of 36.4% (€4.4 million).

Light rail services

Passenger revenues on Luas light rail services grew moderately from 2013 onwards, following the economic downturn, averaging 4.3% annually. 2016 was an exception due to the closure of the red Luas line from Jervis to the Point for six weeks to facilitate Luas CrossCity works and 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 from 2017 to 2019, with passenger revenue peaking at €81.0 million in 2019, which was largely supported by the opening of Luas CrossCity and improved capacity from extended trams. Luas fare revenue was however badly hit during the COVID-19 pandemic, resulting in a fall of 58.6% in 2020 and a further 1.9% in 2021, reflecting vastly reduced passenger numbers on light rail services during extended periods of heightened public health restrictions. 2022, however, has seen a significant return to growth with a 47.2% uplift in passenger revenues compared to the previous year reaching €48.4 million.

Rail services

Passenger revenue on rail services operated by Iarnród Éireann typically account for just over a third of total fare revenue on PSO services nationally. Following a period of relative decline as a result of the economic downturn, passenger fare revenue grew at a rate of 5.8% on average between 2013 and 2019, where total revenue increased to a high of €233.8 million. Rail services were significantly impacted during the pandemic, particularly from a dramatic fall in commuter patronage and the introduction of hybrid working practices, resulting in revenues falling to €100.1 million in 2021. 2022, however, has seen the largest upturn in passenger revenues across the modes (+66.4%), with significant increases in both Intercity and commuter travel as work practices began to return to pre pandemic norms throughout the year.

Table 4A: Annual passenger revenue (millions)

Year / Operator	PSO Bus Services	PSO Rail Services	Light Rail Services	Total
2010	€223.4	€162.6	€40.4	€426.4
2011	€221.5	€156.7	€43.7	€421.8
2012	€240.7	€157.9	€46.4	€445.1
2013	€256.5	€166.9	€47.9	€471.3
2014	€270.3	€174.5	€51.2	€496.0
2015	€284.5	€184.2	€54.4	€523.0
2016	€298.3	€193.7	€54.8	€546.8
2017	€307.2	€204.9	€62.0	€574.1
2018	€325.4	€220.9	€73.4	€619.6
2019	€347.0	€233.8	€81.0	€661.8
2020	€188.9	€101.6	€33.5	€324.0
2021	€197.2	€100.1	€32.9	€330.2
2022	€251.8	€166.5	€48.4	€466.7

*Figures include cash fares, plus contracted revenue collected.

Table 4B: Annual passenger revenue (% Change)

Year / Operator	PSO Bus Services	PSO Rail Services	Light Rail Services	Total
2011	-0.8%	-3.7%	8.0%	-1.1%
2012	8.7%	0.8%	6.4%	5.5%
2013	6.6%	5.7%	3.1%	5.9%
2014	5.4%	4.6%	6.8%	5.2%
2015	5.2%	5.5%	6.3%	5.4%
2016	4.9%	5.2%	0.8%	4.6%
2017	3.0%	5.8%	13.1%	5.0%
2018	5.9%	7.8%	18.4%	7.9%
2019	6.6%	5.8%	10.4%	6.8%
2020	-45.6%	-56.5%	-58.6%	-51.0%
2021	4.4%	-1.5%	-1.9%	1.9%
2022	27.7%	66.4%	47.2%	41.4%

Figure 4.1: Annual Passenger Revenues 2010 - 2022 (millions)

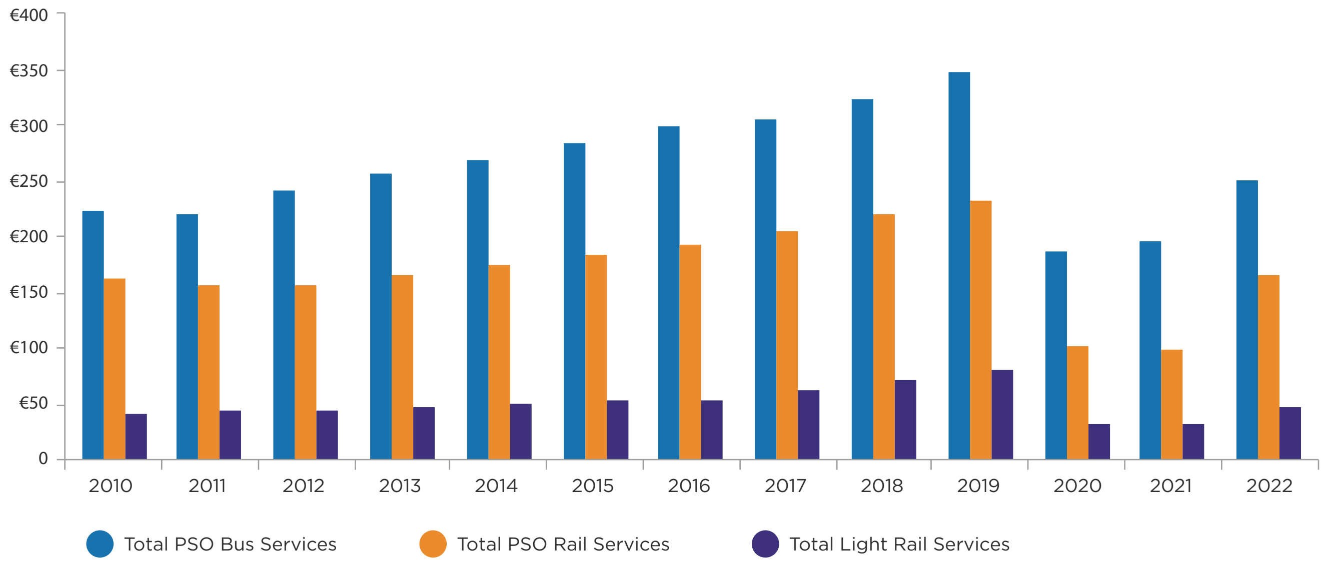


Figure 4.1 shows the annual passenger revenues for each of the public transport modes between 2010 and 2022. In overall terms, in the period up to 2016 PSO passenger revenues grew by an average of 4.3% each year across all modes. In the three years to 2019, however, this accelerated to 6.6%, coinciding with record growth in patronage. If this chart is compared with Figure 1.1 which showed passenger journeys by mode, it can be noted that while bus services nationally carry almost three times the number of passenger journeys compared to rail services, their passenger revenues are more closely aligned. This is because passenger journeys on rail are often over longer distances and the fare charged is greater than the fare charged on bus where in general terms, passengers are carried a much shorter distance.

Similarly with light rail services, while Luas typically carries similar levels of passengers to that of heavy rail services, their revenues are comparatively lower than the other modes as journeys are a lot shorter and therefore have lower fares. As previously discussed, the pandemic in 2020 resulted in significant revenue decline across all modes, with an average reduction of 51.2% nationally. 2021 seen a stabilisation of revenues prior to a significant return to growth in 2022, with an average revenue gains of 41.4% across all modes compared to the previous year.

5

Passenger revenues by region

Table 5A, 5B and Figure 5.1 shows the passenger revenue from 2013 to 2022 for the Dublin region and change experienced over the past 10 years. Dublin city bus services (incorporating services operated by Dublin Bus and Go Ahead Ireland) operate within Dublin City & County, while Dublin Commuter bus services (operated by Bus Éireann and Go Ahead Ireland) also serving Dublin, are included. Also included are rail services operated on Dublin Commuter routes, Dart services, as well as light rail services operated within Dublin City only. Passenger revenues on rail services are not broken down by Iarnród Éireann for the Dublin region and therefore the figures used in tables 5A and 5B are estimates only.

Total passenger revenues in this region grew steadily between 2013 and 2019 by an average of 5.7% annually across all modes, to a peak in excess of €451.7 million in 2019. This was on the back of record growth in patronage prior to 2020 when overall revenues receded to €219.8 million. 2021 saw a further decline of €4.9m as commuters were advised to work from home for a large portion of the year. 2022, however, has seen a resurgence in overall revenues in the region as the use of public transport returned to pre covid levels by the end of the year, with a year on year increase of 34.0% back to €291.1 million.

Leading this return to growth has been Dublin commuter services on both bus and rail, with annual increases of 41.4% and 53.8% respectively. Dublin city bus services experienced a modest growth in revenues of 4.7% in 2021, however has bounced back in line with other modes in 2022, with an annual increase of over €34 million.

Light rail services grew substantially up to 2019, where revenue on Luas services represented the highest revenue growth in the Dublin region at 10.4%. Results for 2021 seen a stabilisation in fare revenues compared to the previous year, and also seen a significant return to growth of 472% in 2022.

Table 5A: Dublin Region Annual Passenger Revenues (millions)

Year / Operator	Dublin City Bus Services	Dublin Commuter Bus Services	Dublin Commuter & Dart Rail Services*	Luas Light Rail Services	Total Passenger Revenue
2013	€184.9	€26.9	€64.2	€47.9	€323.8
2014	€194.4	€28.1	€68.8	€51.2	€342.5
2015	€204.4	€29.6	€73.6	€54.4	€362.0
2016	€211.7	€31.5	€80.9	€54.8	€379.0
2017	€224.7	€29.2	€85.2	€62.0	€401.1
2018	€234.5	€27.6	€90.7	€73.4	€426.2
2019	€247.5	€29.8	€93.3	€81.0	€451.7
2020	€130.1	€18.1	€38.1	€33.5	€219.8
2021	€136.2	€15.4	€32.8	€32.9	€217.3
2022	€170.4	€21.8	€50.5	€48.4	€291.1

*Estimated

Table 5B: Dublin Region Annual Passenger Revenues (% Change)

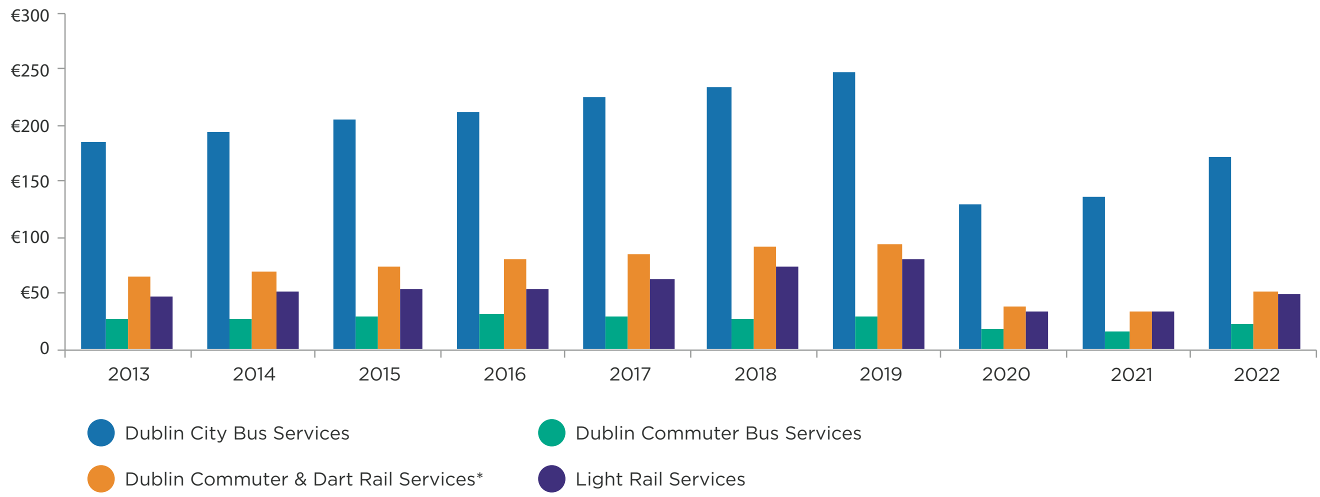
Year/ Operator	Dublin City Bus Services	Dublin Commuter Bus Services	Dublin Commuter & Dart Rail Services*	Luas Light Rail Services	Total Revenue Change
2013 to 2019	33.9%	10.9%	45.3%	69.2%	39.5%
2019 to 2022	-31.1%	-26.8%	-45.9%	-40.3%	-35.5%

*Estimated

Table 5b shows the total change in passenger revenues in the Dublin region between 2013 and 2019 as well as from 2019 to 2022. The change witnessed between 2013 and 2019 helps put the impact of the COVID-19 global pandemic into context, where an increase of 39.5% in revenue was experienced, and despite a strong return to comparative growth in 2022, passenger revenues remain €32.7 million less than that seen in 2013.

Figure 5.1 shows the revenue trends per mode in the Dublin region and in particular the extent of the decline experienced in 2020 and continued impact of the pandemic on fare revenues in 2021. Passenger fare revenues in 2022 can be seen to be growing, despite the introduction of the 20% cost of living fares reduction and Young Adult fares during the year. The dominance of bus services in the Dublin region remains consistent with previous years, with revenues greater than the other modes combined.

Figure 5.1: Dublin Region Annual Passenger Revenues (millions)



Tables 5C and 5D show the breakdown of passenger revenues for areas outside the Dublin region. The majority of PSO bus services are operated by Bus Éireann. All rural bus services operated and managed by Local Link are included here even though a small number of their services operate in the Dublin region. Intercity rail services operated by Iarnród Éireann are also included.

Passenger revenues from outside the Dublin region in 2022 totalled €170.7 million. Whilst this figure represents a fall of just over €32 million compared to 2019, it has increased by €61.0 million year on year and for the second year in a row surpasses the Dublin region in terms of a return to growth post the pandemic. Similar to previous years, passenger revenues outside of Dublin equate to just over half of that generated in Dublin city. The largest contributor to overall passenger revenue continues to be Intercity rail, with 67% of revenue outside of Dublin (113.8m) arising from this sector, representing the single largest increase in revenues of any sector in 2022 (73.1%).

Bus services in the regional cities experienced strong revenue growth between 2013 and 2019, with average increases of 8.3%. This was largely due to the introduction of enhanced timetables by the Authority, combined with increasingly strong passenger journey growth throughout the network. Following the worst of the pandemic in 2021, regional city bus services experienced the most pronounced return to revenue growth of all PSO services, with average increases of 14.1%. Revenues have continued to improve in 2022 with year on year growth averaging 26.5%, with even greater gains on national bus and rural bus services, demonstrating a significant bounce back in patronage on bus services across the country in the last year.

Table 5C: Annual Passenger Revenues Outside Dublin region (millions)

Year/ Operator	Bus Services Cork city	Bus Services Galway city	Bus Services Limerick city	Bus Services Waterford city*	National Bus Services	Intercity Rail Services	Rural Bus Services (Local Link)	Total
2013	€16.1	€5.1	€3.6	€1.0	€16.9	€100.6	€2.2	€145.3
2014	€18.2	€5.8	€3.9	€1.0	€16.9	€103.2	€2.0	€151.0
2015	€20.4	€5.9	€4.0	€1.0	€16.8	€107.8	€2.3	€158.3
2016	€22.7	€6.6	€4.3	€1.0	€18.0	€109.7	€2.4	€164.8
2017	€21.7	€6.7	€4.8	€1.0	€17.0	€116.4	€1.9	€169.5
2018	€22.6	€7.5	€5.4	€1.1	€21.2	€126.7	€3.4	€187.9
2019	€25.6	€8.5	€5.7	€1.4	€22.6	€136.1	€3.3	€203.3
2020	€14.6	€5.1	€3.9	€0.8	€13.4	€61.6	€3.0	€102.5
2021	€16.0	€6.0	€4.6	€0.9	€13.1	€65.8	€3.3	€109.6
2022	€19.8	€7.7	€5.7	€1.1	€18.0	€113.8	€4.4	€170.7

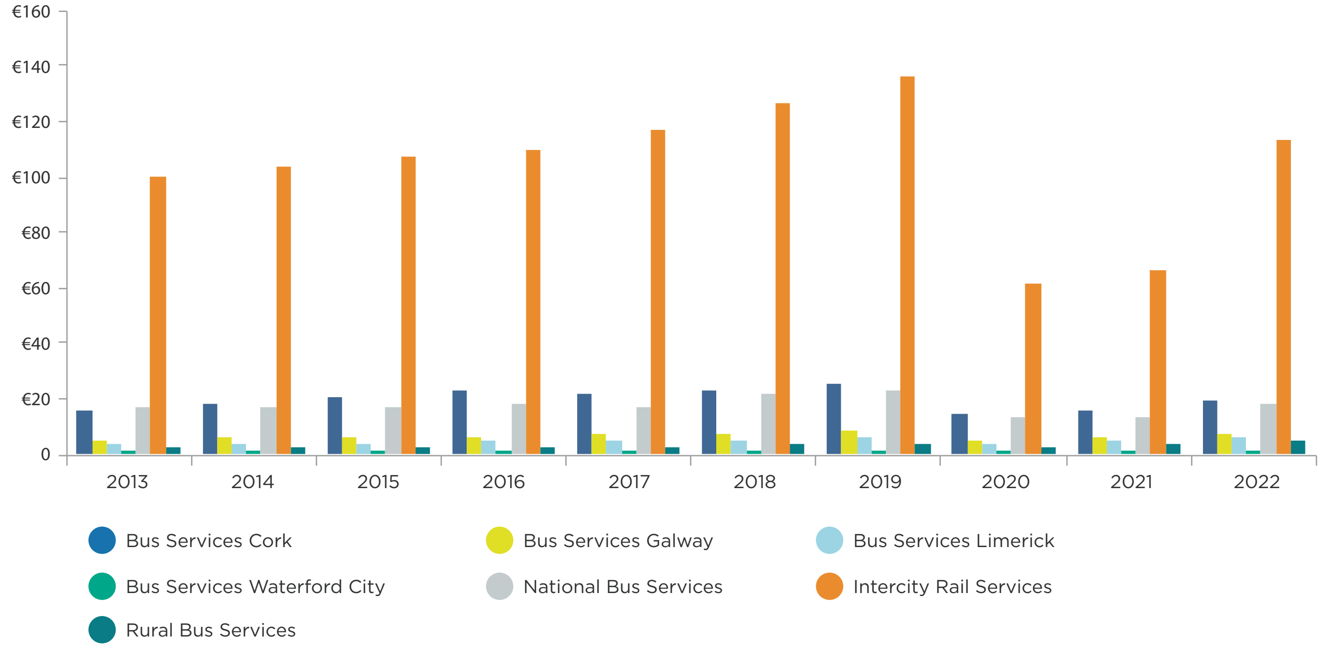
Table 5D: Annual Passenger Revenues Outside Dublin region (% Change)

Year/ Operator	Bus Services Cork city	Bus Services Galway city	Bus Services Limerick city	Bus Services Waterford city*	National Bus Services	Intercity Rail Services	Rural Bus Services (Local Link)	Total
2013 to 2019	59.7%	68.1%	59.2%	49.3%	33.3%	35.3%	52.3%	39.9%
2019 to 2022	-22.7%	-9.7%	0.4%	-21.9%	-20.1%	-16.3%	34.8%	-16.0%

Passenger revenue growth outside Dublin rose by just over 40% between 2013 and 2019, which is on a par with that seen in Dublin itself, before receding by almost 50% in the year to 2020 due to the impact of the pandemic. Revenue outturns across all market segments up to that time were reflective of a number of interventions by the Authority, namely; moderate or minimal fare increases for example on Intercity rail, improved service provision through reconfiguration of bus services e.g. city networks, the introduction of greater numbers of contracted services on the rural bus network, and the positive impact of the tendering of services to support passenger growth.

These improvements have in part expedited a return to pre pandemic use of public transport in 2021 (with a 7.1% increase across all modes), however, with a significant return to public transport in the aftermath of the omicron variant and associated minor lockdown in early 2022, passenger revenues have returned to within 16% of pre pandemic levels.

Figure 5.2: Annual Passenger Revenues outside Dublin Region (millions)



Figures 5.1 and 5.2 show that despite the declines seen since 2020, Dublin city bus services account for the largest portion of passenger revenues in the Dublin region, while revenues on Intercity rail services account for the highest revenues outside the Dublin region (approximately 67% of Dublin city bus revenue). However, Dublin city bus services typically carry approximately 12 times more passenger journeys than that of Intercity rail. This is reflective of passengers on bus services in Dublin city taking short journeys and paying a relatively small fare, while passengers on Intercity rail services are taking much longer journeys on average and therefore paying a higher fare.

Figure 5.3: Passenger Revenue Change by Market Segment 2013 to 2022

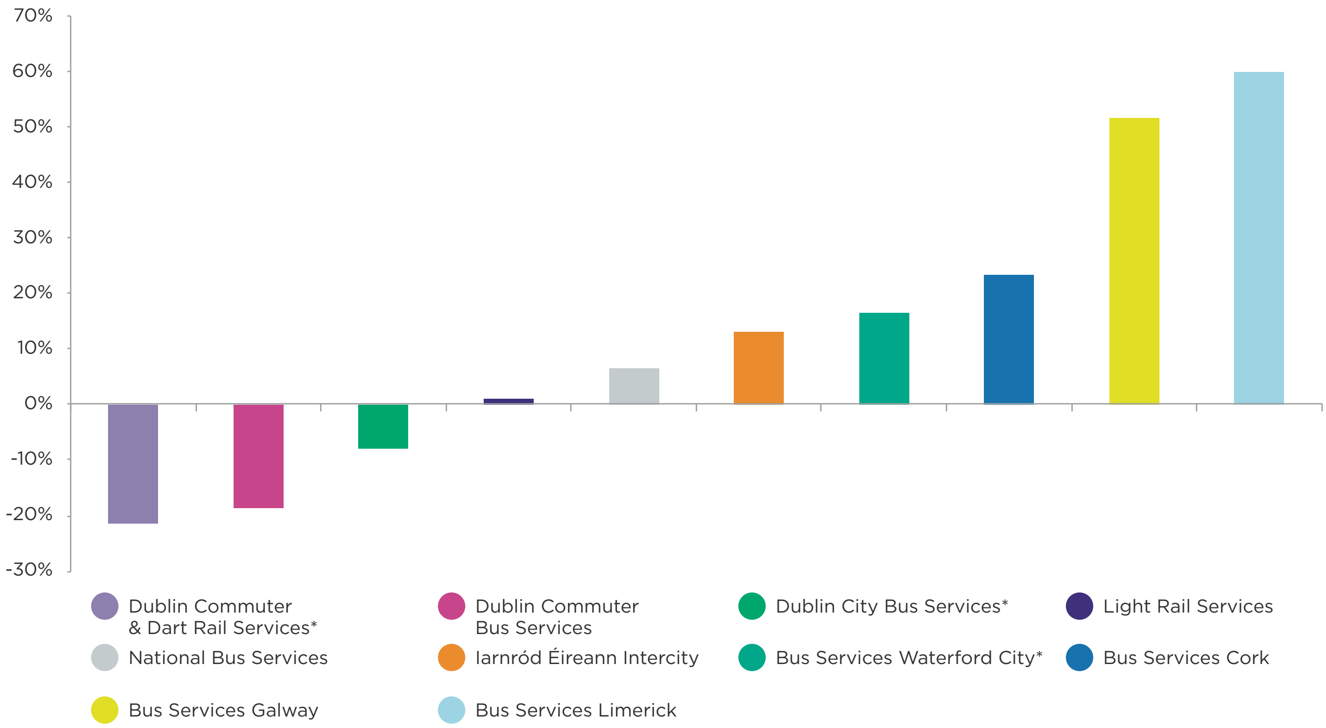


Figure 5.3 shows the passenger revenue change by market segment between 2013 and 2022. To put this chart into context in light of the impact of the COVID-19 pandemic on public transport services, the same comparisons when made between 2013 and 2019 show passenger revenues having increased by 49.3%. As a direct result of passenger numbers decreasing significantly in 2020 and 2021, the revenue outturn when compared to 2013 now shows an average upturn of 12.4% across all market segments nationally, despite patronage having returned to pre pandemic levels by the end of 2022. The position has improved significantly from 2020, when passenger revenue across all sectors were -21.1% lower.

Similar to that of passenger journeys, services which ordinarily would either see high levels of commuters have experienced the most dramatic decline in passenger revenues owing to the effects of the pandemic and associated capacity restrictions. There has however been a major upturn in the latter stages of 2022 which has improved the relative position on commuter type services compared to the previous year.

The regional cities continued to perform strongly in 2022, building on a strong return to growth in passenger numbers, with Limerick and Galway in particular returning in excess of 50% ahead in terms of passenger revenues over the ten year period.

6
Free Travel Scheme revenue

The Department of Social Protection (DSP) 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 public transport services including PSO bus, rail and light rail services and some ferry services. It is also available on a large number of licensed public bus services operated on a commercial basis. The DSP spends in the region of €76 million on the scheme each year on PSO services. Funding for the scheme for PSO operators has remained relatively 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. Free Travel Scheme funding for PSO operators has increased marginally by €6.2 million since 2010, with €56.8 million provided to NTA for PSO services operators in 2022.

Table 6A shows annual DSP payments for the Free Travel Scheme. The differences in revenue in Table 6A from 2010 to 2018 largely reflects timing differences, although in some cases deductions have been made from the payments when services did not operate due to industrial action. Payments to the scheme between 2019 and 2022 include that paid for operators of competitively tendered services, with the final calculation methodology yet to be confirmed with DSP.

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

Table 6A - Annual DSP Free Travel Scheme Passenger Funding (millions)

Year / Operator	Total PSO Bus Services	Total PSO Rail Services	Total Light Rail Services	Total
2010	€33.1	€14.6	€3.0	€50.6
2011	€32.9	€14.6	€4.1	€51.6
2012	€34.2	€14.6	€3.8	€52.6
2013	€34.0	€14.6	€3.4	€52.0
2014	€34.1	€14.5	€3.9	€52.5
2015	€34.1	€14.6	€3.9	€52.7
2016	€34.9	€14.6	€3.9	€53.4
2017	€34.7	€14.6	€3.9	€53.2
2018	€35.5	€14.6	€3.6	€53.7
2019	€40.0	€16.8	€3.9	€60.8
2020	€37.8	€14.4	€3.9	€56.2
2021	€37.2	€14.4	€3.9	€55.5
2022	€38.5	€14.4	€3.9	€56.8

Table 6B: Annual DSP Free Travel Scheme Passenger Journeys (millions)

Year / Operator	PSO Bus Services	PSO Rail Services	Light Rail Services	Total
2010	31.6	3.9	2.2	37.7
2011	31.7	4.2	3.1	39.0
2012	32.8	4.5	3.1	40.4
2013	32.7	4.5	3.5	40.7
2014	33.9	4.6	3.6	42.1
2015	34.0	4.6	3.9	42.4
2016	36.3	4.8	3.5	44.6
2017	39.0	4.9	3.7	47.6
2018	40.4	5.0	4.0	49.4
2019	43.4	5.1	4.9	53.3
2020	23.7	1.5	2.0	27.2
2021	25.2	1.1	2.0	28.3
2022	32.8	4.0	3.6	40.4

Table 6C: DSP Free Travel Scheme Passenger Journeys (% Change)

Year / Operator	PSO Bus Services	PSO Rail Services	Light Rail Services	Total
2010 to 2022	4.0%	1.1%	62.9%	7.2%

In recent 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 growing numbers who have availed of the Free Travel Scheme up to 2019, shown in table 6B. In the period between 2010 and 2019 the number of passenger journeys taken under the Free Travel Scheme increased by 41.3% across all modes. The pandemic in 2020 resulted in a dramatic fall in the use of public transport services across the state, with a similar decline in demand seen for free travel. This result in 26.1 million fewer users in 2020, before stabilising marginally in 2021 and returning to 2012 levels in the last year. Total journeys remain 12.9 million lower than the peak in 2019, however, growth has returned in 2022 particularly on Luas Light Rail services.

Table 6D: Average FTS payment per passenger journey (€)

Year / Operator	Total PSO Bus Services	Total PSO Rail Services	Total Light Rail Services
2010	€1.05	€3.71	€1.33
2011	€1.04	€3.49	€1.31
2012	€1.04	€3.22	€1.22
2013	€1.04	€3.22	€0.98
2014	€1.00	€3.13	€1.09
2015	€1.00	€3.16	€1.01
2016	€0.96	€3.07	€1.11
2017	€0.89	€3.00	€1.07
2018	€0.88	€2.95	€0.90
2019	€0.92	€3.31	€0.81
2020	€1.60	€9.45	€1.98
2021	€1.48	€13.32	€1.93
2022	€1.17	€3.62	€1.08

Table 6D shows the average payment per journey taken under the Free Travel Scheme. What we can see in the period up to 2019 across all modes, is that journeys on the scheme have increased while the level of payment has remained relatively flat. As payments to transport operators have increased only marginally in recent years, the falloff in demand due to the pandemic resulted in average payments per passenger appearing artificially high, however these have largely returned to longer term averages as the use of public transport increased once again in 2022.

7

Public Service Obligation (PSO) subsidy

Public Service Obligation (PSO) funding is provided for socially necessary but commercially unviable bus and rail services. Payments in respect of bus and rail transport contracts since 2010 are set out in Table 7B. Payment for PSO services is governed by public service contracts between the Authority and the relevant operator. The requirements for entering into contracts for provision of PSO services is set out in both EU and Irish legislation. Regulation EC 1370/2007 is the EU wide legal framework and the DTA Act 2008 is the national legislation, both governing the regulation of public bus and rail passenger services including the approach for awarding contracts for service delivery and providing PSO compensation for the provision of such services.

The majority of PSO funding goes to Dublin Bus, Bus Éireann and Iarnród Éireann - the C.I.É. operators. Contracts with the two bus companies were renewed in December 2014 and again in December 2019 for a further 5 years. The Authority has also entered into another 10 year direct award contract with Iarnród Éireann in 2019, as it is statutorily required to do. These new direct award contracts provided for the transition from net cost contracts to gross cost contracts in 2021. This brought these contracts into line with the Authority's competitively tendered contracts. The cost of providing these services are fixed and all fare revenue is transferred to the Authority. PSO payments are then made to the operators to cover the full cost of the operation of the service. 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.

The large public service contracts provide for deductions in payments to operators associated with poor performance across a number of quality metrics as well as incentive payments if performance is higher than the required standard.

A number of additional public transport services, which also receive PSO funding, are provided by other operators procured following public tender competitions. These contracts also operate under a gross cost contract model. Details of these services are outlined in the table below.

Table 7A: Other tendered PSO bus services

Operator	Routes operated
Andrew Wharton Coach Hire	Route 975 between Cavan and Longford
Bernard Kavanagh & Sons Limited	Route 817 between Kilkenny and Dublin
Bus Éireann	Routes W1, W2, W3, W4 & W5 in Waterford City
City Direct	Routes KK1 / KK2 in Kilkenny City
Go Ahead Ireland	24 urban in Dublin
Go Ahead Ireland	3 regional routes in Kildare
Go Ahead Ireland	Route 197 between Swords and Ashbourne
JJ Kavanagh & Sons	Route 139 between Naas and Blanchardstown

Rural transport services provided by operators under the Local Link brand are also funded by the Authority. Significant change in the delivery structure for these services took place in recent years, and additional funding has been provided for new or improved rural transport services. There are now 15 Local Link offices with the role of managing the programme on behalf of the NTA at local level.

Table 7B: PSO Subsidy Payments (millions)

Year / Operator	Iarnród Éireann	Dublin Bus PSO	Bus Éireann PSO	Rural Bus (Local Link) Services	Luas Light Rail	Other Operators	Total
2010	€155.1	€75.8	€45.2	€11.0	€0.0	€0.0	€287.2
2011	€148.7	€73.0	€43.4	€10.6	€0.0	€0.0	€275.8
2012	€166.4	€74.8	€36.9	€9.8	€0.0	€0.0	€287.8
2013	€127.0	€64.5	€34.4	€9.6	€0.0	€0.0	€235.6
2014	€117.4	€60.0	€34.4	€10.1	€0.0	€0.2	€222.1
2015	€98.1**	€57.7	€33.7	€10.7	€0.0	€0.3	€200.5
2016	€133.1	€59.6	€40.8	€11.9	€0.0	€0.3	€245.6
2017	€147.0	€54.0	€52.2	€13.7	€6.7	€0.3	€273.9
2018	€141.3	€47.5	€54.3	€18.6	€0.0	€5.9	€267.5
2019	€128.4	€53.5	€66.4	€22.0	€0.0	€20.1	€290.5
2020	€239.3	€133.4	€101.1	€24.6	€30.2	€35.7	€564.3
2021	€210.2	€146.0	€66.6	€25.3	€32.2	€33.1	€513.3
2022	€225.6	€147.5	€115.0	€32.2	€24.5	€24.8	€569.6

*All payments shown above represent the net subvention required, .i.e. the difference between the cost of operating the service and the fare revenue collected.

**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.

*** TII received a once off payment in 2017 of €6.68m for Luas CrossCity mobilisation costs. Also included in 2020 and 2021 are payments to TII to support the operation of Luas light rail services during the Covid-19 global pandemic.

Table 7C: PSO Subsidy Payments (% Change)

Year / Operator	Iarnród Éireann	Dublin Bus PSO	Bus Éireann PSO	Rural Bus (Local Link) Services	Luas Light Rail	Other Operators	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%		500.0%	-5.7%
2015	-16.4%	-3.9%	-2.0%	5.9%		50.0%	-9.7%
2016	35.6%	3.2%	21.1%	10.8%		9.8%	22.5%
2017	10.5%	-9.4%	27.8%	15.9%		15.1%	11.5%
2018	-3.9%	-12.0%	4.0%	35.3%		1630.1%	-2.3%
2019	-9.1%	12.8%	22.3%	18.5%		240.4%	8.6%
2020	86.4%	149.2%	52.2%	11.6%		77.6%	94.3%
2021	-12.2%	9.4%	-34.1%	2.7%	6.6%	-7.3%	-9.0%
2022	7.3%	1.0%	72.7%	27.6%	-24.0%	-25%	11.0%

* See Table 7A: Other tendered PSO Bus services for details

Total PSO funding reached a pre-pandemic high in 2019, supporting record growth in public transport patronage in the same year. Payments to bus operators providing services under gross cost contracts formed the most noteworthy increase in 2019 (€20.1m in total), reflecting the significant investment in enhanced service provision undertaken by the Authority, through the introduction of new services as well as tendering of existing services.

The scale of the impact of the COVID-19 global pandemic on the use of public transport was substantial.

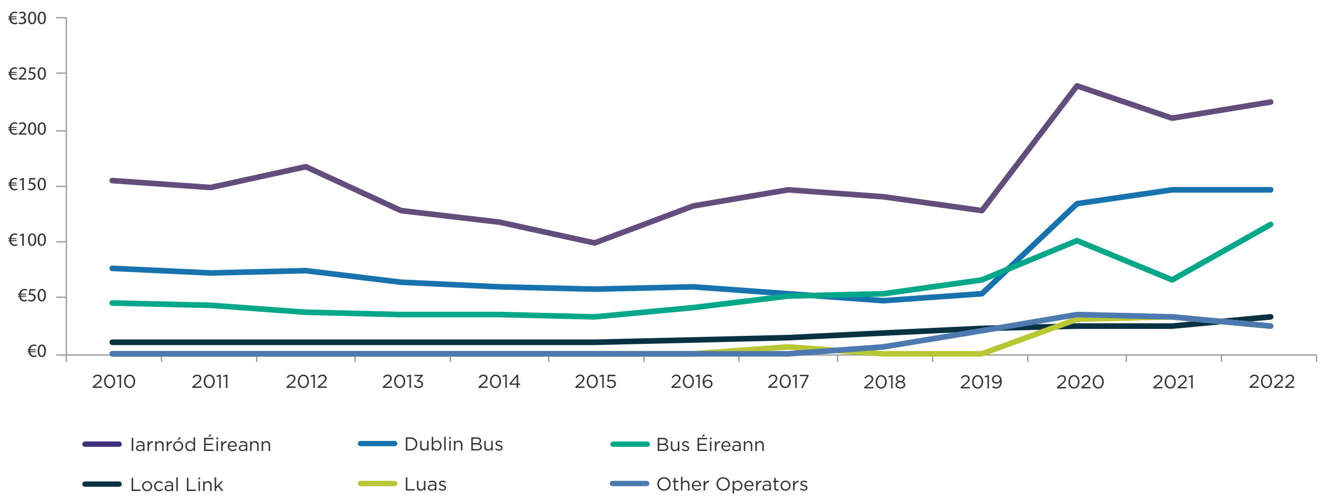
The vast decline in passenger journeys across the State in March 2020 resulted in considerable fare revenue losses for the Authority, which was absorbed through additional Government funded subvention to ensure services continued to operate in line with public health restrictions until capacity restrictions were lifted on 1st September 2021 (with the requirement to wear face masks on public transport remaining in place). The funding requirement for subsidised public transport services almost doubled as a consequence in 2020 compared to the previous year. Despite a slight reduction in 2021, the €513.3 million paid to operators remained significantly higher than pre-pandemic. This trend continued in 2022, where as a result of several keys factors including contract indexation costs of both existing and new services as a result of increases in the cost of living; ongoing pandemic related lockdowns arising from the omicron variant; and the introduction of key revenue diluting fares initiatives such as Young Adult fares and the 20% cost of living fares reduction all required a significant increase in state subvention.

The subvention requirement for Bus Éireann PSO services reduced by the greatest extent in 2021, reflecting an encouraging return to growth in patronage as the economy emerged from the worst of the pandemic and resulting fare revenue in the regional cities and on national services. The increase seen in 2022 is largely related to the additional funding required from government as a result of the introduction of Young Adult fares in early 2022, offering young people 50% discount on equivalent Adult fares.

In 2019, for the second successive year, the PSO payment to Iarnród Éireann fell slightly to €128.4 million. This was partly a result of continued growth in passenger journeys and associated growth in passenger revenues reducing the level of their PSO subsidy. As previously alluded to, the pandemic impacted the provision of rail services most significantly, as restrictions on the use of public transport continues to alter the travel patterns of regular commuters. Resulting fare revenue losses were significant with the necessary subvention to maintain services rising by 86.4% to €239.3 million in 2020, €210.2 million in 2021 and €225.6 million in the last year.

Subvention paid to Dublin Bus increased very slightly in 2022, as a result of a number of factors including new services and contractually agreed indexation to allow for price inflation. This also applied to some extent to Bus Éireann, however, subvention to this operator increased significantly to €115 million, primarily due to the introduction of Young Adult fares across the national bus network in early 2022. Subvention paid to LocalLink in 2022 for rural services increased by 27.6% to €32.2 million due to two factors, namely provisions made as a result of the Ukrainian refugee crisis and also the continuing rollout of the Connecting Ireland programme.

Figure 7.1: PSO Payments 2010 to 2022 (millions)

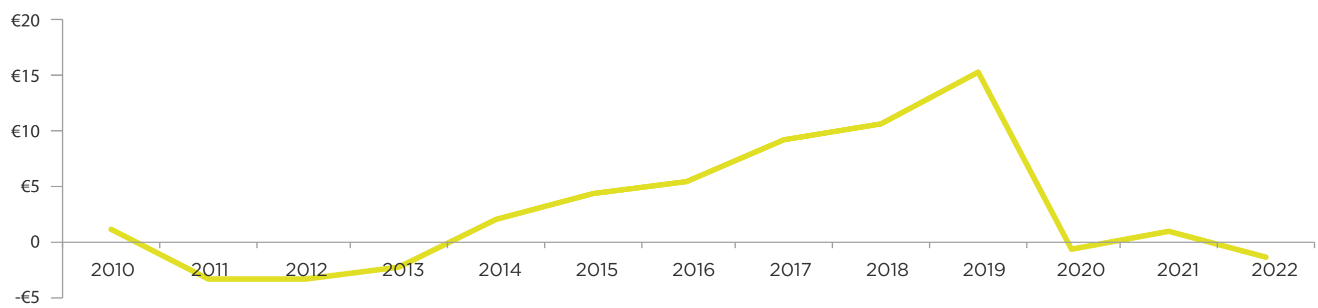


Light rail (Luas) services operated by Transdev Dublin Light Rail Limited experienced deficits between revenue and operating costs between 2011 and 2013. In 2014 Luas operations returned a surplus of €1.94 million, which increased annually to €15.31 million in 2019 as shown in Table 7D and Figure 7.2. In 2017 TII received a once-off PSO grant of €6.68m towards Luas CrossCity mobilisation costs. Luas did not receive PSO funding from the Authority in 2019, with the Authority agreeing to the balancing of any shortfalls from accumulated cash reserves (which were used to fund the maintenance of the Luas network along with the Authority's capital grant funds). The dramatic decline in passenger journeys and fare revenue commencing in 2020 has necessitated subvention payments to TII of €30.2 million in 2020, €32.2 million in 2021 and €24.5 million in 2022, in order to maintain services in line with public health restrictions, resulting in the surplus/deficit outlined in the table below:

Table 7D: Surplus/Deficit on Luas Infrastructure activities before interest, tax and depreciation

Year	€ million
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	€10.60
2019	€15.31
2020	-€0.65
2021	€0.98
2022	-€1.32

Figure 7.2: Surplus/Deficit on Luas Infrastructure Activities, 2010 -2022 (millions)



8 Operator Fleets

The total fleet that are owned and/or maintained by operators of all PSO services is outlined in Tables 8A, 8B, 8C and 8D. 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. Both the Dublin Bus and Bus Éireann fleets reduced marginally in 2019 as a result of buses being allocated to some services which were transferred to Go Ahead Ireland as a result of the tendering of services. Since that time, fleet numbers have increased due to network improvement and expansion both in Dublin through the BusConnects programme and nationally through initiatives such as Connecting Ireland. Bus Éireann occasionally hire in additional buses to complement services on some routes but those buses are not included in the table. Also included are all buses owned or maintained in the operation of all other competitively tendered contracted bus services, as outlined at the beginning of this bulletin.

Table 8A: Total Number of Buses

Year	Dublin Bus PSO	Bus Éireann PSO	Other tendered PSO Services	Total bus fleet on PSO services
Quarter 4 2010	1023	400	0	1423
Quarter 4 2011	940	460	0	1400
Quarter 4 2012	914	443	0	1357
Quarter 4 2013	907	453	2	1362
Quarter 4 2014	919	453	3	1375
Quarter 4 2015	943	475	4	1422
Quarter 4 2016	967	517	5	1489
Quarter 4 2017	993	542	5	1540
Quarter 4 2018	987	588	128	1703
Quarter 4 2019	985	574	211	1770
Quarter 4 2020	998	587	211	1796
Quarter 4 2021	1034	643	220	1897
Quarter 4 2022	1058	626	223	1907

From 2022, operators are required by the Authority to report on the environmental performance of their fleets including power source, fuel type usage, emissions etc. To date, PSO bus fleets which have diversified away from 100% diesel engines include Dublin Bus and Bus Éireann, the compositions of which are show below.

Table 8B: PSO Bus Fleet by Power Source

Operator	Diesel	Hybrid	Hydrogen
Dublin Bus DAC	79.3%	21.8%	0.0%
Bus Éireann DAC	93.1%	10.1%	0.5%
Other tendered PSO Services	100.0%	0.0%	0.0%

The Luas light rail fleet, shown below in Table 8C, consists of three types of Light Rail vehicle (LRV); those which are 40 metres in length (Citadis 401), those which have been extended to 55 metres (Citadis 402) as part of the Green Line capacity enhancement programme in 2020 and new 55 metre trams which were purchased as part of the same capital expenditure programme for the Greater Dublin area (Citadis 502).

Table 8C: Total tram fleet - 2022

LRV Type	Number of LRVs in Fleet
Citadis 401	40
Citadis 402	26
Citadis 502	15
Total	81

The national rail fleet is shown below in Table 8D. Individual train types are generally specific to a particular service, such as Intercity (Intercity Railcar or ICR), Commuter (Diesel Multiple Unit or DMU) etc., however variations of sets may be used on multiple leg journeys throughout a typical day. ICR's and DMU's are stated according to the total number of individual sets comprising one train service, so for example, 3 ICR represents a three set ICR service. Also shown are those sets which are exclusive to a service type, namely Dublin-Cork Intercity (MKIV), Dublin to Belfast Enterprise (DD) and Dart services (EMU).

Table 8D: Total rail fleet - 2022

Train Type	Total Fleet
3 ICR (Intercity Railcar)	84
4 ICR (Intercity Railcar)	100
5 ICR (Intercity Railcar)	50
29000 DMU (Diesel Multiple Unit)	116
2800 DMU (Diesel Multiple Unit)	20
2600 DMU (Diesel Multiple Unit)	16
MKIV (Mark 4 Cork Line Trains)	67
DD (De Dietrich Belfast Enterprise Train)	32
EMU (DART Electrical Multiple Unit)	144
Total	629

9
Age of buses

Table 9A shows trends in the average age of fleets for PSO bus services. It should be noted that 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 Dublin Bus buses providing services included in the PSO Direct Award Contract only.

For Bus Éireann, figures for 2010 and from 2017 onwards refer to their entire PSO fleet. Figures for "other services" between 2011 and 2016 includes stage carriage and Dublin Commuter fleet, however on occasion a commercial (Expressway) vehicle could have been used for these services. Also shown are the combined age profile for buses across all other competitively tendered contracted bus services, where depending on the contract, operators provide the buses themselves to the Authority's specification or they are provided by the Authority for the duration of the contract.

Table 9A: Average Age of Operator's Fleet

Year	Dublin Bus PSO	Bus Éireann PSO (city services)	Bus Éireann PSO (other services)	Other tendered PSO Services
Quarter 4 2010	6.8 years	4.8 years		-
Quarter 4 2011	7.7 years	6.4 years	5.5 years	-
Quarter 4 2012	7.5 years	5.6 years	5.4 years	-
Quarter 4 2013	7.5 years	5.4 years	6.1 years	6.5 years
Quarter 4 2014	7.6 years	6.4 years	7.4 years	7.8 years
Quarter 4 2015	7.5 years	6.3 years	6.7 years	8.8 years
Quarter 4 2016	7.5 years	6.3 years	7.4 years	9.8 years
Quarter 4 2017	7.2 years	7.3 years		6.7 years
Quarter 4 2018	6.9 years	6.4 years		5.3 years
Quarter 4 2019	6.6 years	7.9 years		3.5 years
Quarter 4 2020	6.9 years	6.9 years		4.0 years
Quarter 4 2021	5.8 years	6.1 years		4.5 years
Quarter 4 2022	6.3 years	5.9 years		4.9 years

The Authority has a target average age for its fleet of 7 years. Capital investment in the fleet by the Authority in recent years has reduced the average age to more acceptable levels.

10

Major bus & rail network changes

The major changes to bus and rail networks over the last number of years are outlined in Tables 10A, 10B and 10C.

Table 10A: Iarnród Éireann Network Changes

Line extensions / re-openings/suspensions	Date
Cork Suburban Rail: Cork to Midleton – Opened	Jul-09
Western Railway Corridor: Ennis to Athenry – Re-opened	Mar-10
Rosslare to Waterford - Passenger Services Suspended	Sep-10
Dublin Suburban Rail (Western Commuter): Clonsilla to M3 Parkway - Opened	Sep-10
Kildare line services commence using the Phoenix Park Tunnel (peak only, Mon – Fri)	Nov-16
Introduction of the new 10-minute DART timetable	Sep-18
Opening of new commuter rail station at Pelletstown in west Dublin	Sep-21

Table 10B: Luas Network Changes

Line extensions	Date
Red Line: Connolly to Docklands – Opened	Dec-09
Green Line: Sandyford to Brides Glen - Opened	Oct-10
Red Line: Belgard to Saggart - Opened	Jul-11
Green Line: St Stephen's Green to Broombridge - Opened	Dec-17

Table 10C: Bus Network Changes

Line extensions	Date
Network redesign phases	Date
Phase 1- H-Spine services (North East Dublin - Malahide corridor)	Jun-21
Phase 2 - C-Spine services (West Dublin - Maynooth corridor)	Nov-21
Phase 3 - North Side Orbitals (Blanchardstown SC to Point Village & Finglas to Howth Junction)	May-22
Phase 4 - G Spine (Red Cow Luas & Liffey Valley to City centre)	Oct-22

11 Wheelchair accessible fleet

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.

Urban bus fleets operated by Dublin Bus, Bus Éireann, Go-Ahead and other operators are fully wheelchair accessible, as can be seen in Table 11A. These fleets comprise single and double decker low floor buses appropriate for short commuter journeys and are fitted with ramps to facilitate wheelchair users.

The rural, regional and commuter bus services operated by Bus Éireann, Go-Ahead and other operators 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.

Double-deck coach fleet provided to Bus Éireann and Go Ahead Ireland for commuter services have a low-floor ramp access to the wheelchair space. The Authority has also procured a number of specially designed single deck buses to operate on commuter services that are low-floor and ramp access and these will be provided over the next few years as funding is available to replace the high-floor coach fleet.

While the Iarnród Éireann fleet of trains are fully wheelchair accessible internally, they require a ramp to enable access between the train and the platform. A 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. Trams used on Luas light rail services are all wheelchair accessible from the platform.

Table 11A: PSO Operating Fleet that are Wheelchair Accessible

Year	Urban bus services	Non-urban bus services*			Rail Services (with ramp)	Light Rail Services
		Low-floor ramp	Wheelchair lift	Total accessible		
2013	100%	-	-	-	100%	100%
2014	100%	-	-	-	100%	100%
2015	100%	-	-	-	100%	100%
2016	100%	-	-	-	100%	100%
2017	100%	-	-	-	100%	100%
2018	100%	-	-	-	100%	100%
2019	100%	-	-	-	100%	100%
2020	100%	-	-	-	100%	100%
2021	100%	58%	42%	100%	100%	100%
2022	100%	62%	38%	100%	100%	100%

*Urban bus services include those PSO services operating in Dublin (e.g. Dublin Bus and Go Ahead, including the 197) and the regional cities (e.g. Bus Éireann and City Direct in Kilkenny). Non-urban bus services have been categorised as all other PSO services operating outside of major urban centres (e.g. national stage carriage and commuter).

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