Statistical Bulletin: 01/2025
September 2025

Údarás Náisiúnta Iompair
National Transport Authority

Commercial Bus Services

in Ireland (Overview of 2024)

Overview of Commercial Bus Services

1. Number of Operators and Licences
2. Passenger Journeys
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Acknowledgement

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

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Introduction

Introduction to the Commercial Bus Services in Ireland Statistical Bulletin

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

The data in this bulletin covers statistical information for all regular public bus passenger services across the entire State for the years 2013 to 2024 and for the Greater Dublin Area (the "GDA") for the years 2012 to 2024.

High level information on State funded services which are provided under contract to the Authority referred to as Public Service Obligation ("PSO") services, have also been included for comparative purposes. The Authority publishes a separate bulletin on State funded services "Bus and Rail Statistics for Ireland – State Funded Services" which can be found on the Authority's website at: www.nationaltransport.ie/publications/statistics/bulletins

Return to Full Bulletin for the Year 2024 and Abridged Bulletins Published for the years 2020 to 2022 Inclusive.

Due to the devastating impact of the COVID-19 crisis on the public transport market, the Authority provided funding to and allowed for partial or complete suspensions of commercial bus services. These supports were withdrawn in 2022. Consequently, abridged versions of the annual bulletin were published for the years covering 2020, 2021 and 2022. These highlighted the differences between 2019, the last full year of normal operations, and the years 2020 to 2022, to demonstrate the recovery since the outbreak of the pandemic. Comparisons were also drawn between 2013, the first-year data was collected across the entire State, and the relevant year.

The 2025 bulletin, covering the data year 2024, is a full version of the statistical bulletin. Comparisons between 2024 and 2019 will be made where full information for the years 2020 through to 2022 is not available.

Note for 2024 figures

Some licence holders have updated their previously submitted data from their previous year's submissions. This bulletin represents the most up to date information.

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

Licensed public bus passenger services are often called "commercial" bus services because they are operated without any public subsidy from the Authority. This has changed: firstly, temporary funding was made available to regular commercial bus service operators from mid-2020 to 2022 and secondly, in 2022 the Authority launched the Young Adult and Student Card ("YASC") Fares Scheme, and 42 commercial bus operators opted into the Fares Scheme. Commercial bus operators receive compensation for the fare forgone for offering the 50% discount to 19-25 year-old, between 2022 and 2024, and to full-time third-level students. As the YASC Fares Scheme is voluntary and as commercial bus services are individually licensed by the Authority, a single commercial bus operator may have some regular licences in the YASC Fares Scheme and others that are not. Some commercial bus services also receive payments from the Department of Social Protection's Free Travel Scheme, in compensation for the revenue foregone from carrying those passengers entitled to free travel.

The commercial bus services covered by this bulletin are any licensed regular bus service with an origin, intermediate point, or a destination within the Republic of Ireland. Bus services which were subject to an international authorisation under international law and were travelling to, from, or through Northern Ireland and this State are also included in the bulletin. References to commercial bus services therefore include services operating wholly within the State and commercial bus services which cross the border into Northern Ireland.

The figures for commercial bus services provided in 2024 by the two principal contracted State-funded bus operators, Bus Éireann (under the brand name of "Expressway") and Dublin Bus, are included in this bulletin.

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

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

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

Commercial bus services travelling wholly outside of the GDA counties are referred to as 'Non-GDA services' and 'Nationally' refers to the combined figures for all the commercial bus services running to, from, or through the State. These are the meanings assigned throughout the document, unless otherwise stated. GDA and Non-GDA services include both licensed and authorised services.

Licence Categories not included in this Statistical Bulletin

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

- Event and Venue licences, which cover public bus passenger services for concerts and other events;
- Specific Targeted licences, which cover public bus passenger services such as tours;
- Temporary licences; and
- Demand Responsive licences.

Complete details of each category of public bus passenger service licence can be found in the 'Guidelines for the Licensing of Public Bus Passenger Services' available to download from www.nationaltransport.ie/bus-licensing

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

Information on the State Funded Bus and Rail services has been included for comparative purposes only. These services consist of the Public Service Obligation ("PSO") services provided by Iarnród Éireann (Irish Rail), LUAS, Dublin Bus, Bus Éireann, Go-Ahead Ireland, Local Link, and private operators under contract to the Authority. Full details can be found in the Authority's Statistical Bulletin September 2025. Comparisons do not include information on services provided under the School Bus Transport Schemes or Taxis. The former are provided under the auspices of the Department of Education and information on the latter can be found in the Authority's SPSV Bulletin 2023. All of the Authority's Bulletins can be viewed and downloaded here: www.nationaltransport.ie/publications

Level of Data Collected

Six operators did not supply returns for commercial bus services provided in 2024. This represented 7% of all licences in 2024 and both the combined passenger journeys and vehicle kilometres operated last submitted for these licences account for less than 0.5% of overall totals for 2024. Due to the rounding used in this bulletin the figures would have a low statistical impact on the percentages stated however, the actual figures for 2024 could be higher than recorded.

Authority Obligations in Relation to Commercially Sensitive Information

In publishing this data, the Authority has been fully aware of its obligations regarding commercially sensitive information and has therefore ensured that patronage and revenue data have been presented in a consolidated and anonymised fashion. All the Authority's Bulletins can be viewed and downloaded here: www.nationaltransport.ie/publications

Statistical Qualification

It is important to know that the figures used in this bulletin are provided by the operators and are not independently verified by the Authority.

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

Overview of Figures for Commercial Bus Services in 2024

Total Passenger Journeys (Nationally)

2023 22.36 Million Journeys

2024 22.58 Million Journeys

Up 1% from 2023

Total Scheduled Vehicle Kilometres (Nationally)

2023 89.4 Million KM

2024 89.0 Million KM

Down 0.4% from 2023

Total Annual Revenue

2023 €210.5 Million Euro

2024 €218.6 Million Euro

Up 3% from 2023

Number of Active Licences (Nationally)

2023 250

2024 247

Overview of Commercial Bus Services in 2024

There is no restriction to the number of licences an operator may hold. There is a large variability and diversity in the scale, frequency, and type of commercial bus services provided by operators. Types of commercial bus services include large scale inter-city and interurban services, which provide connections to and from the country's main towns, cities, and airports; commuter services that bring passengers to employment and education; urban and suburban services; as well as rural services that generally link small towns and villages in rural areas.

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

Data was first gathered on the commercial bus sector in 2013, reporting on services operated within the GDA in 2012. Due to the COVID-19 pandemic there was a restriction to 25% capacity in place on public transport at the start of 2020. Gradually the restriction on capacity was eased and public transport services returned to 100% capacity on 1st of September 2021. However, the demand for travel still rendered many services commercially unviable to operate. The impact of the COVID-19 pandemic on commercial bus services is clearly illustrated in Table A and Figures A and B.

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

Year	Total Passenger Journeys	Free Travel Journeys (Estimated)	Scheduled Vehicle KM	Total Annual Ticket Revenue
2013	20.1	4.8	80.1	€135.9
2019	30.5	6	101.2	€220.0
2020	9.4	2.2	67.2	€99.5
2024	22.6	4.0	89.0	€218.6
Change 2013-2019	52%	24%	26%	126%
Change 2019-2024	-26%	-33%	-12%	-1%

Change in Travel during COVID-19

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

There are many areas where commercial bus operators provide most, and in some locations all, regular public bus services. Therefore, it was essential for both social and economic reasons that some commercial bus services recommenced during the COVID-19 pandemic. In June 2020, the Government announced temporary funding supports for the licensed regular bus sector, in accordance with EU and national legislation to support economically necessary services that were determined as services of general economic interest or Public Service Obligation by the Authority on an emergency basis. Due to this financial support, the impact of the COVID-19 crisis on the licensed regular bus sector was mitigated and many commercial bus services resumed in full or in part in July/ August 2020. The supports continued throughout 2021 and ceased in June 2022.

To allow commercial bus operators maximum agility to respond to the changing passenger demand and to enable the fastest possible return of services, the Authority also permitted commercial bus operators to partially or fully suspend their licensed regular services from March 2020. While demand for travel in 2022 was above 2021 levels and there were no capacity restrictions on public transport in 2022, it remained unviable for some services to operate or operate in full. Suspensions of services due to COVID-19, in whole or in part, were permitted until 7th November 2022.

During the periods in 2020 and 2021 when capacity restrictions were in place on public transport, additional vehicles had to be deployed by operators. This was to ensure that capacity restrictions were adhered to and that passengers were able to board services. Therefore, some individual services were operated by two or three vehicles. As a result, while there was a large reduction in the total passenger journeys, there was not a corresponding consistent reduction in the kilometres operated or the number of vehicles utilised. For this reason, operators were asked to provide the actual operated vehicle kilometres for each licence for the years 2020 and 2021. Due to complete or partial suspensions of licensed regular services being allowed in 2022, the Authority again asked operators to provide actual operated vehicle kilometres. The operated vehicle kilometres figure incorporates the additional kilometres provided when more than one vehicle was deployed. Capacity restrictions on vehicles decreased throughout 2021, and the number of vehicles used to provide the services decreased while at the same time the number of vehicle kilometres increased.

Current Trends

The year 2024 saw a stagnation in growth of passenger journeys on regular public bus passenger services. The overall passenger journeys increased by just over 200 thousand when compared to 2023, which represents a 1% increase, going to 22.6 million passenger journeys. This represented the lowest increase since data was first collected in 2013 (excluding the large decrease of 21% in 2020 due to Covid). The highest increase was between 2021 and 2022 with an 83% increase in passenger journeys. Total passenger journeys in 2024 had grown by 13.2 million from the 9.4 million low of 2020.

With the similar passenger levels when compared to the previous Bulletins overall passenger journeys were still approximately 22.6 million passenger journeys or 26% below the peak of 30.5 million in 2019. Passenger journeys on commercial bus services in 2024 represented 6% of all public transport journeys, down from 9.4% in 2019. The number of active regular licences continued to fall and was at 76% of the 2019 peak. The greatest decrease was of those licences operating wholly outside of the GDA. There was also a drop in the number of operators. Overall, the total number of operators went down to 70% compared to the 2019 peak. Most of this decrease occurred among operators holding a single licence.

2019 was the peak of both passenger journeys and scheduled kilometres for commercial bus services.[2] In that year there were 30.5 million passenger journeys made, and 101.2 million kilometres scheduled. Passenger journeys dropped by 69% from 2019 to 2020. This 69% decline for commercial bus services was the largest decline in passenger journeys of all public transport services . The next steepest decline was on Heavy Rail services which dropped by 64%. Passenger journeys on the commercial bus services outside of the Greater Dublin Area (“GDA”) fell by less than the journeys on services stopping in the GDA. However, these services operating outside of the GDA have seen a slower growth since 2020.

From the outset COVID-19 brought about changes to travel demand, which continued to impact travel and travel patterns in 2024. This is especially evident in the different levels of change between kilometres operated and passenger journeys from 2020 to 2024, also shown in Figures A to B and Table A.

Passenger journeys on the commercial bus services

[2]Taxi and School Bus Transport Schemes services are not included in these figures.

have increased more since 2020 than on contracted public bus services. Overall commercial bus passenger journeys have increased by 140% with contracted bus service passenger journeys increasing by 138%. Both Heavy and Light Rail services passenger journeys increased at a greater rate than the bus services. However, as the commercial bus passenger journeys had decreased to a greater extent than the other modes of public transport during the pandemic, in 2024 they were at 74% of the 2019 peak. The contracted bus services passenger journeys were over 22% higher in 2024 than in 2019, with Luas Light Rail services 12% above the 2019.

Scheduled vehicle kilometres, vehicle age, emissions, and accessibility information are indicators for trends in the availability of and investment in public transport provided by commercial bus services. In 2024, a new method of gathering data was used, refined further in 2025. More detail per vehicle was sought in relation to accessible features. Previously the data was sought on an overall operator fleet basis. Comparison with previous years would be open to inaccuracies. Trends on the previous years, where the data was comparable, will be retained for reference. In 2024, emissions data was sought for the first time on an individual vehicle level. Therefore, the data on emissions in this bulletin will be compared solely to the year 2023.

The high ratio of scheduled vehicle kilometres for commercial bus service, when compared with all other public transport vehicle kilometres, is due to the large variation in the nature of the bus service types provided. These include high frequency urban services and long-distance intercity services, as well as college, commuter, and rural services.

2024 was the third-year operators were asked to report on a per licence basis the number of vehicles and accessible vehicles used. This provides more accuracy in calculating not just the number of accessible vehicles, but also the volume of the overall kilometres provided by such vehicles. 51% of all kilometres operated in 2024 were by accessible vehicles. In 2019, when operators reported on the overall fleet accessibility rather than licence accessibility, they reported that 59% of the scheduled vehicle kilometres were provided by accessible vehicles.

2023 data indicated that 56% of all kilometres operated were accessible. The reduction of 5% is partially due to some highly accessible operators no longer holding operating licences.

Figure A: Overview of Figures for Commercial Bus Services in 2020, 2023 and 2024 compared to 2019

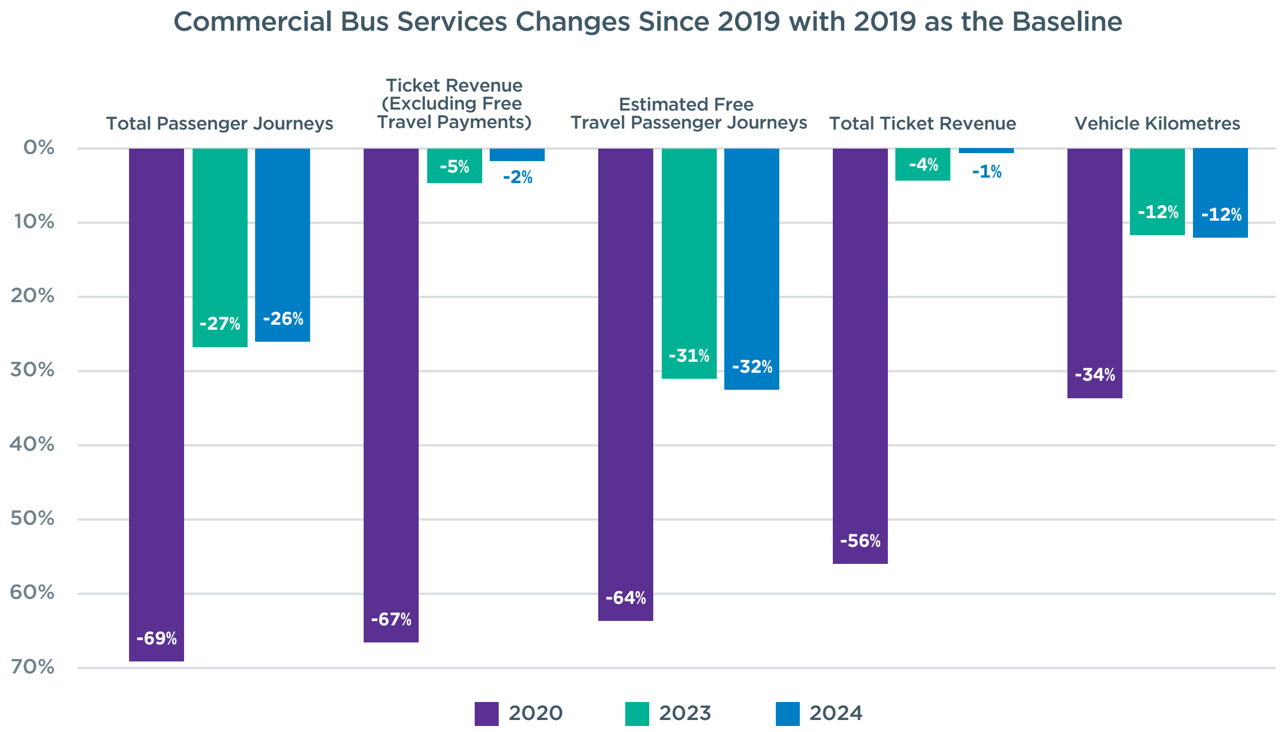
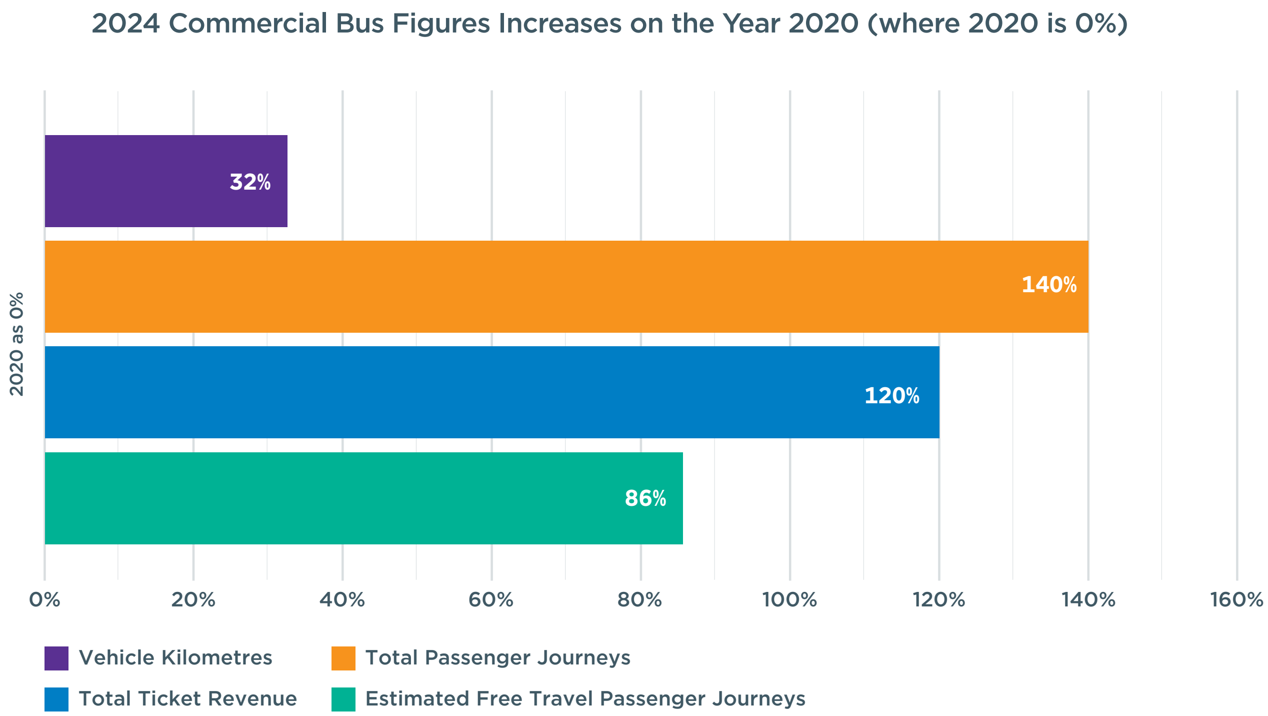


Figure B: Overview of Figures for Commercial Bus Services in 2024 Increases Shown Compared to 2020



1

Number of Operators and Licences

It is important to highlight that there is a large variability and diversity in the scale, frequency, and type of commercial bus services provided by operators.

Commercial bus services cover large scale inter-city and interurban bus services which provide connections to and from the country's main towns, cities and airports; commuter services that bring passengers to employment and education; urban and suburban services; and rural services that generally link small towns and villages in rural areas.

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

Figures 1.1 and 1.2 show the number of active operators and the number of active licences/ authorisations per year. These figures show the decline in the number of licences and operators since 2019, with a greater percentage decrease in licences than in operators. Where a licence and an authorisation are operated in conjunction with each other, this has been counted as one service. Table 1A shows the number of new licences granted for regular commercial bus services. Regular licences are valid for three years and expire if not renewed. Licences may also be revoked, either by the Authority or at the request of the operator.

The overall number of operators remained relatively static between 2013 and 2019. There was a significant drop in operators providing active licensed services as well as in licences themselves between 2019 and 2020, due to the suspensions permitted during the pandemic. The number of operators from 2020 onwards, though reduced, has again remained relatively static through to 2023 before dropping slightly in 2024. Figure 1.3 shows that the greatest reduction in operators providing regular bus services occurred among those with only one licensed service. Between 2019 and 2024, the number of these operators fell by 38%, which is at least 10 percentage points higher than the reductions observed in the other groups. Operators with more than one licence may have seen some licensed services cease, but there was only a 16% reduction in operators with 2 to 3 licences and a 27% reduction in operators with 4 or more licences.

The reduction in licensed services was most noticeable in Non-GDA licences, where there has been a continued decline since 2019. There was no decline in GDA licences between 2019 and 2020 and there was an increase in these licences between 2022 and 2024, going from 89 to 90 licences.

It must be noted that these figures are overall volumes, and individual operators have entered and left the market. As with previous years, operators with a higher number of licences carried the greater number of passengers, but represented a small proportion of all operators.

Figure 1.1: Number of Operators with Active Regular Licences

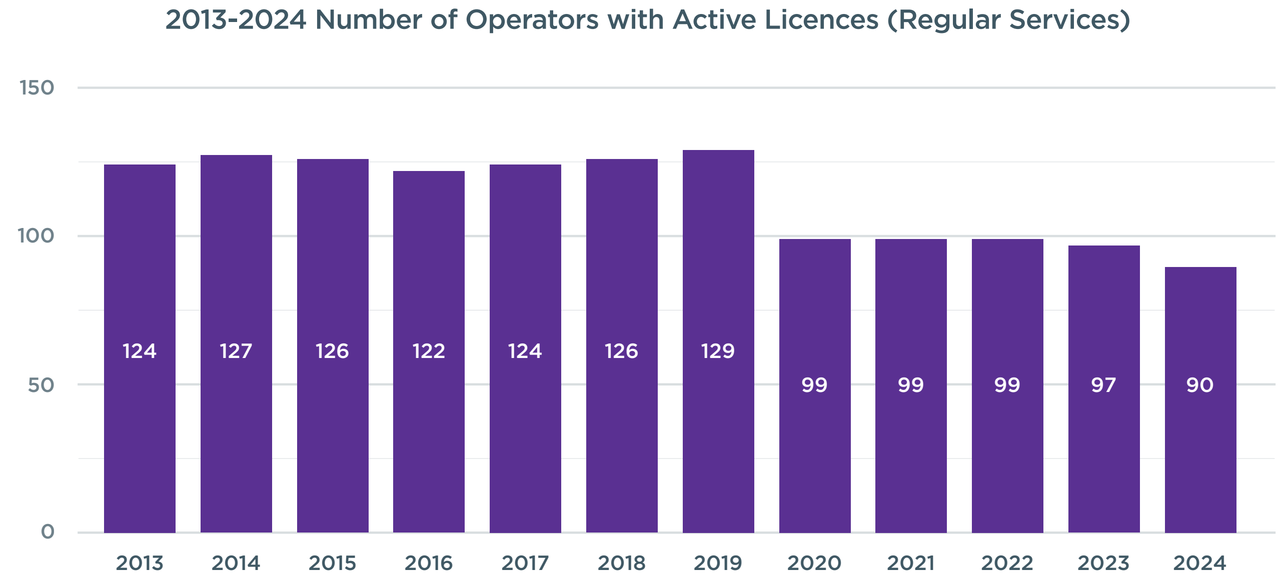


Figure 1.2: Number of Active Regular Licences/ Authorisations

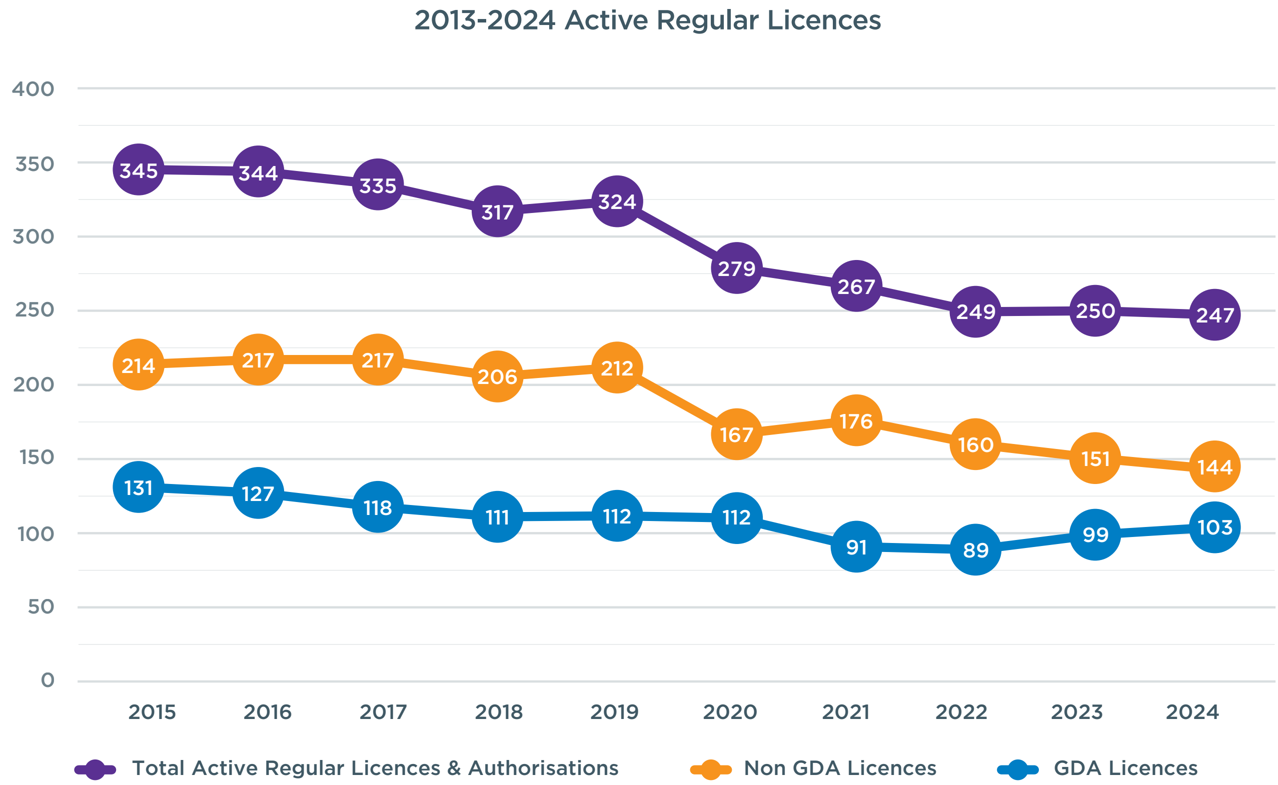


Table 1A: Number of New Licences (Excludes Licences granted where a previous Licence expired)

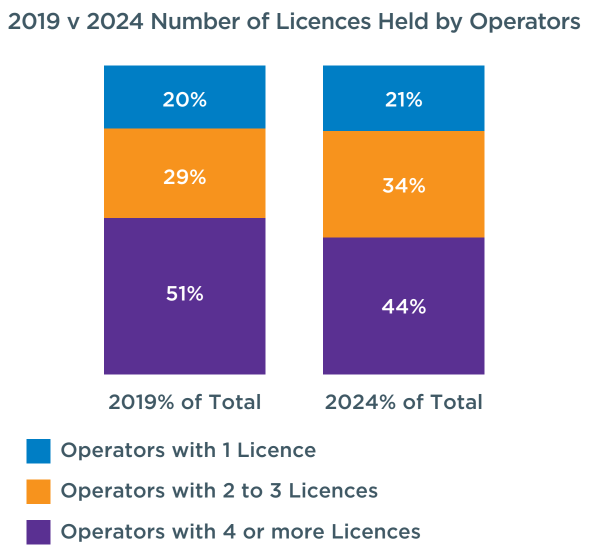
Year	Non-GDA services	GDA services	Total New Regular Licences Granted	New Licences which Commenced in year granted
2014	25	7	32	--
2015	20	15	35	33
2016	12	11	23	17
2017	12	6	18	13
2018	6	4	10	6
2019	7	8	15	14
2023	2	6	8	2
2024	6	6	12	6

Figures 1.3 and 1.4 set out the percentages of operators by the number of licences held and compare national totals against the GDA and Non-GDA only operators. Figure 1.5 compares the number of licences held by operators and the percentage of the passenger journeys taken on those services.

In 2024, 44% of all operators held a single licence. This was down from 2019 where over half of all the operators (51%) held a single licence. Operators with only one licensed service have seen the greatest reduction in numbers, with a drop of 38% between 2019 and 2024. Figure 1.3 shows that operators with more than one licence increased as a share of the total number of operators. While the number of operators in all categories has decreased, the decrease is greatest where the operator held a single licence.

As can be seen from Figure 1.2, the number of active regular licences has also decreased. There has been a continued decrease in Non-GDA services. In 2024 there was a slight decrease of licences operating in the GDA.

Figure 1.3: Percentage of Operators by Number of Licences held



Licences have three Bands depending on the number of services on the licence. Band A licences are for up to 624 services per year, Band B for 625 to 3,000, and Band C for over 3,000 services per year. Figure 1.4 shows the breakdown of these licences by area. Viewed with Figure 1.3, this shows that while there are more Non-GDA licences in volume operating, there are fewer services per licence.

Figure 1.4: Percentage Breakdown of Active Licences Held by Number of Services Per Licence

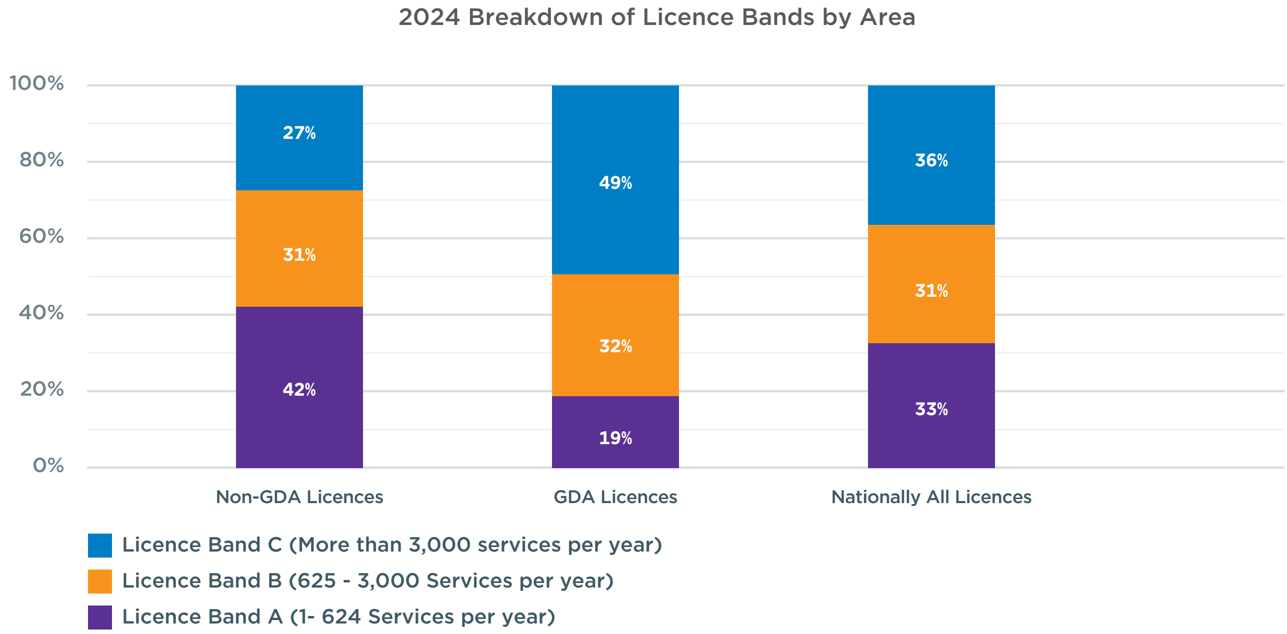
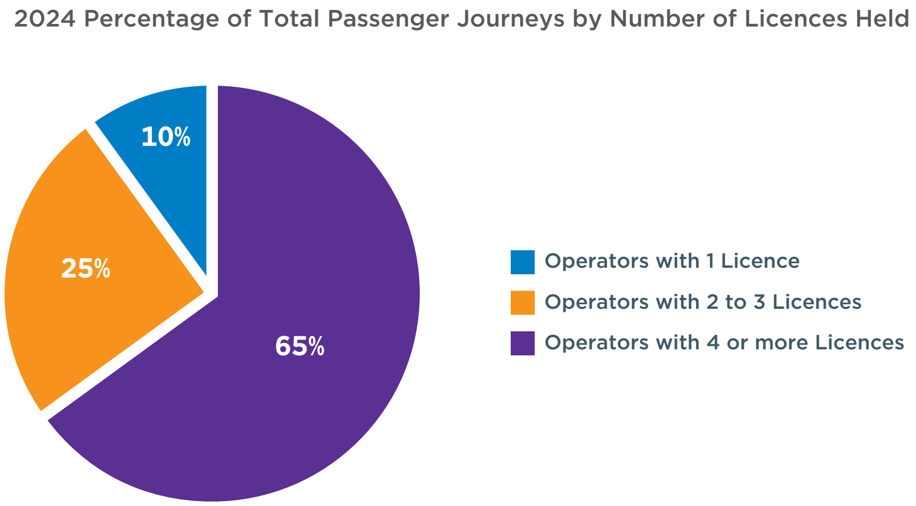


Figure 1.5: Percentage of Passenger Journeys based on Number of Licences held (Nationally)



2

Total Number of Passenger Journeys

Demand for public transport services is strongly related to economic activity. Economic growth increases employment, disposable income, and consumer spending, all of which lead to greater demand for travel. Economic decline produces the opposite effect.

Passenger journeys on the commercial bus services had seen an increase of 11.2 million journeys or 158% in the six years between the first-year data was collected in 2013 to the peak of 2019. The impact of COVID-19 in 2020 saw journeys decline by 21 million, or 69% in the year between 2019 and 2020 as travel restrictions came into place in March 2020. There was little growth between 2020 and 2021 when travel restrictions remained in place. Post COVID-19, there was a spike in growth. The level of increase was driven by significant growth in GDA services, which in 2022, 2023 and 2024 were more than double those of Non-GDA services. See Figure 2.1 and Table 2A.

There were 22.6 million passenger journeys in 2024. This shows that weak overall growth in passenger journeys continued on commercial bus services between 2023 and 2024, with an increase of 0.22 million passenger journeys, or 1% compared to the previous year. This was the lowest increase since 2013, excluding the large 2020 decrease due to COVID-19. Following the removal of travel restrictions, there was an 83% spike in growth between 2021 and 2022. Overall passenger journey numbers for 2024 on commercial bus services were up 13.2 million, or 139.6%, from the low of 9 million journeys in 2020. Overall, journeys were at about 74% of the peak figures of 2019. Compared to previous years, this was just under the 24 million passenger journeys reported for 2016.

Changes to passenger journeys have been different depending on the area the services have operated. Non-GDA services have seen a decrease in the overall share of passenger journeys each year since 2013. Their share changed from 37% of all passenger journeys to 29% between 2013 and 2019, as the GDA passenger journey increases surpassed those of the non-GDA services. During COVID-19 Non-GDA services saw less of a decline, at 58%, and an increase in the total share of passenger journeys compared to GDA services, which saw a 73% decline in passenger journeys. This share of all passenger journeys on Non-GDA services increased during the pandemic years to 39% of all journeys in 2020 and then to 42% in 2021. This represented the highest share of all passenger journeys for the Non-GDA services since data was collected.

Due to there being less of a decline in passenger journeys on Non-GDA services between 2019 and 2020 figures have returned to 78% of the 2019 peak in 2024. This is despite growth being half that of GDA services, which were at 72.5% of the 2019 peak in 2024. Table 2B gives a breakdown of the market share of passenger journeys between Non-GDA services and GDA services.

For a broader perspective, Figures 2.5 to 2.9 compare passenger journeys on commercial bus services with those on PSO bus and rail services. As shown, commercial services experienced a greater decline in passenger numbers due to COVID-19. Overall, when restrictions were lifted, commercial bus services saw a greater spike in passenger journeys than the combined PSO services in 2022. By 2024, the overall increase in PSO passenger journeys had surpassed that of commercial bus services, with patronage on all PSO transport modes exceeding the 2019 peak. As a result, despite the rise in commercial bus passenger journeys in 2024, they represented only 6% of overall public transport passenger journeys, down from over 7% in 2023.

Figure 2.1: Commercial Bus Services Total Passenger Journeys by Year 2013-2024 (in millions)

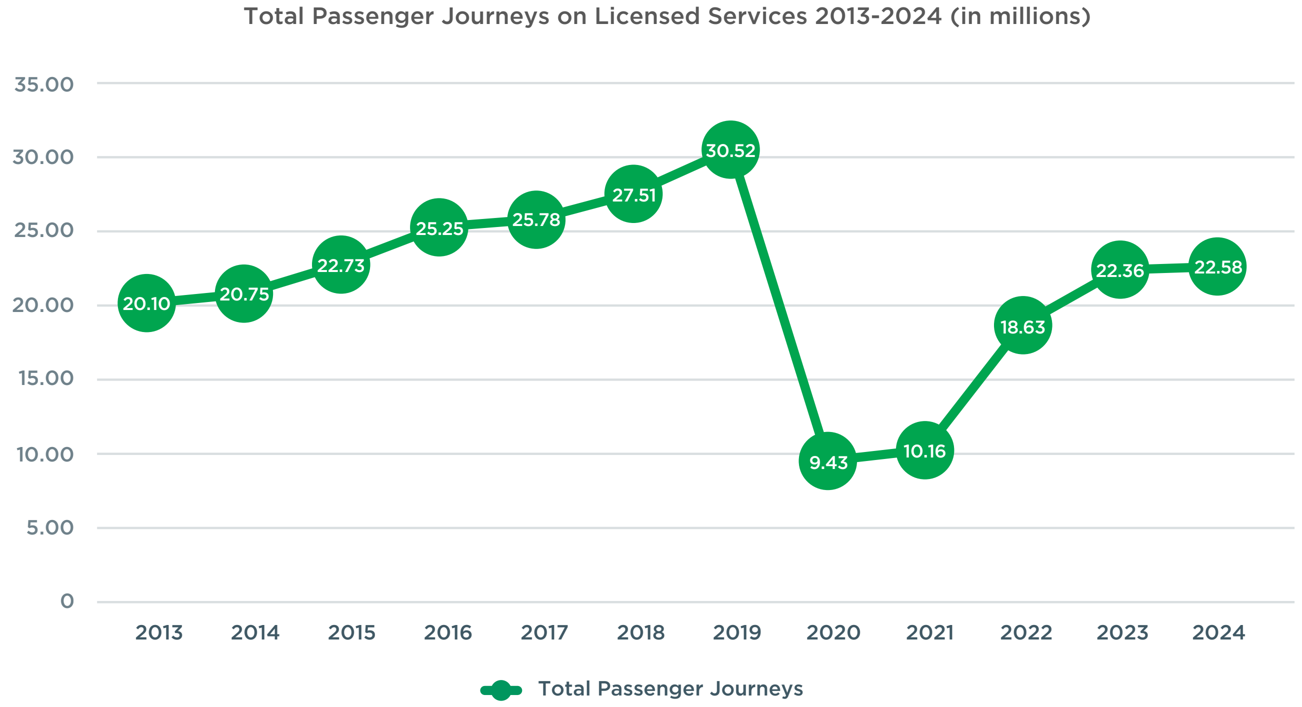


Table 2A: Percentage Change from 2013 Annual Commercial Passenger Journeys

Year/ Licensed & Authorised Services	Total Passenger Journeys	Total Change	% Change From Previous Year	% Change with 2013 as 100%
2013	20.10	0.00	-	100%
2014	20.75	0.65	3.2%	103%
2015	22.73	1.98	9.6%	113%
2016	25.25	2.52	11.1%	126%
2017	25.78	0.52	2.1%	128%
2018	27.51	1.74	6.7%	137%
2019	30.52	3.01	10.9%	152%
2020	9.43	-21.09	-69.1%	47%
2021	10.16	0.73	7.7%	51%
2022	18.63	8.47	83.4%	93%
2023	22.36	3.73	20.0%	111%
2024	22.58	0.22	1.0%	112%

Figure 2.2 Percentage of Total Annual Commercial Passenger Journeys by Service Type

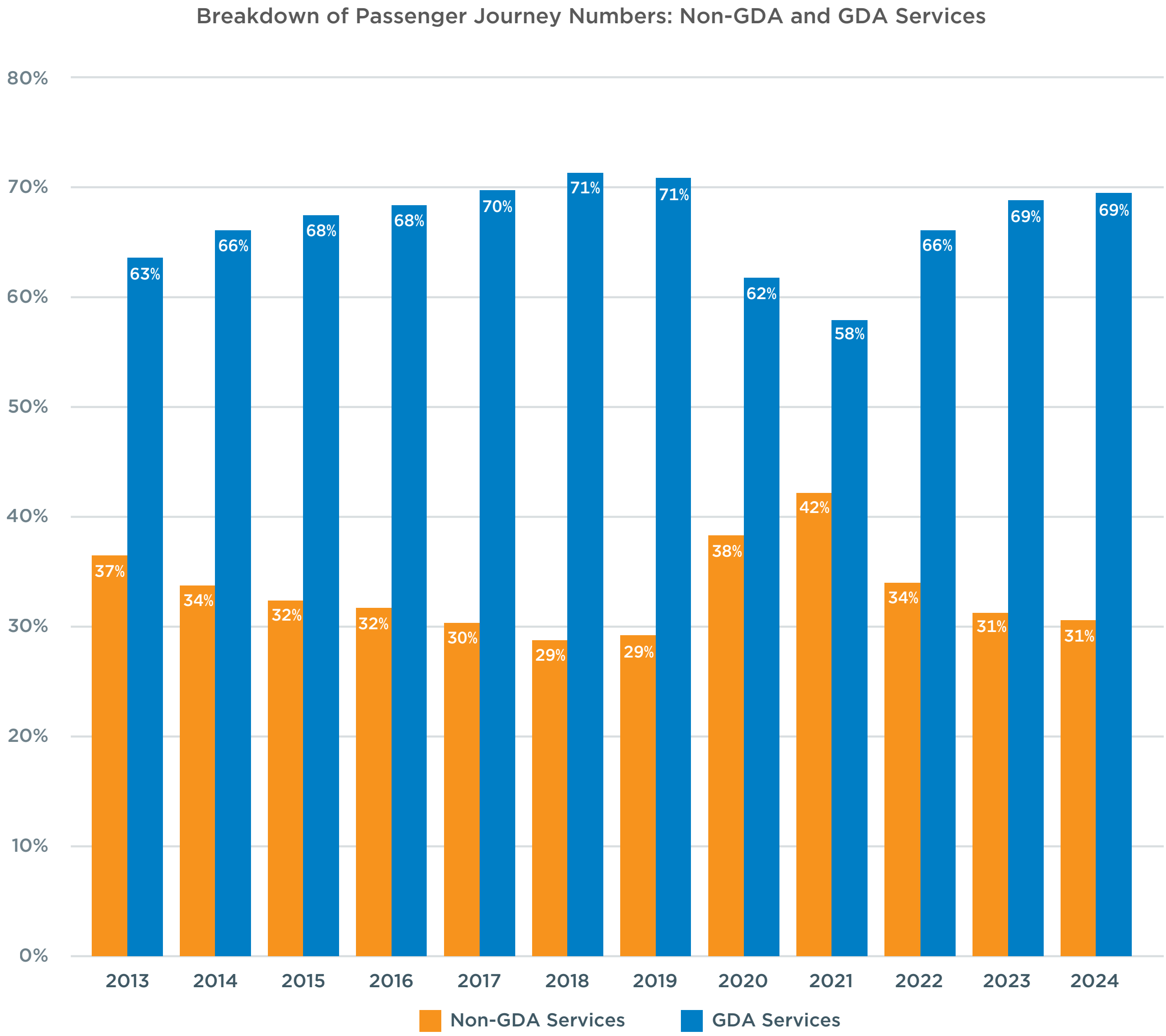


Figure 2.3: Comparison of Commercial Bus Services Total Passenger Journeys by Area by Year 2013-2024 (in millions)

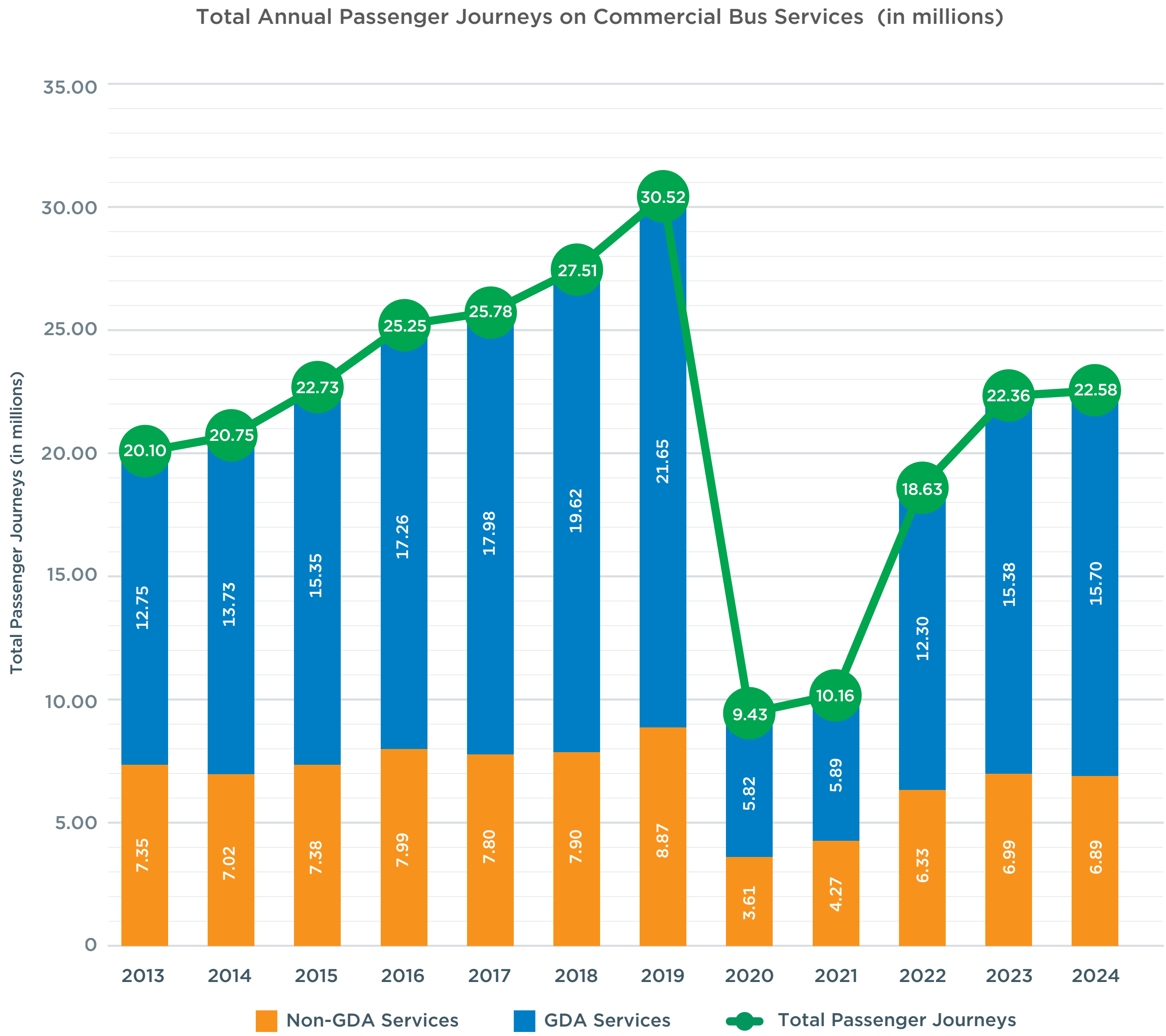


Figure 2.4: Annual Passenger Journeys and Percentage Change by Area by Year

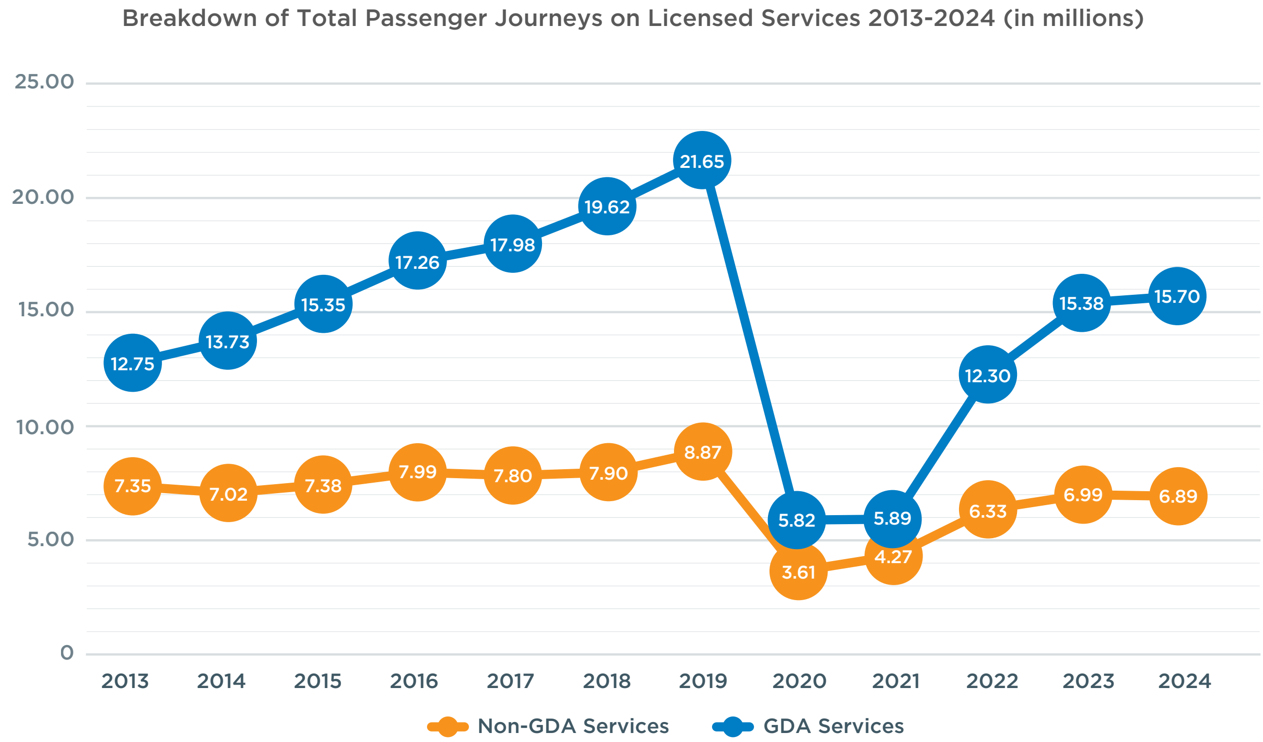
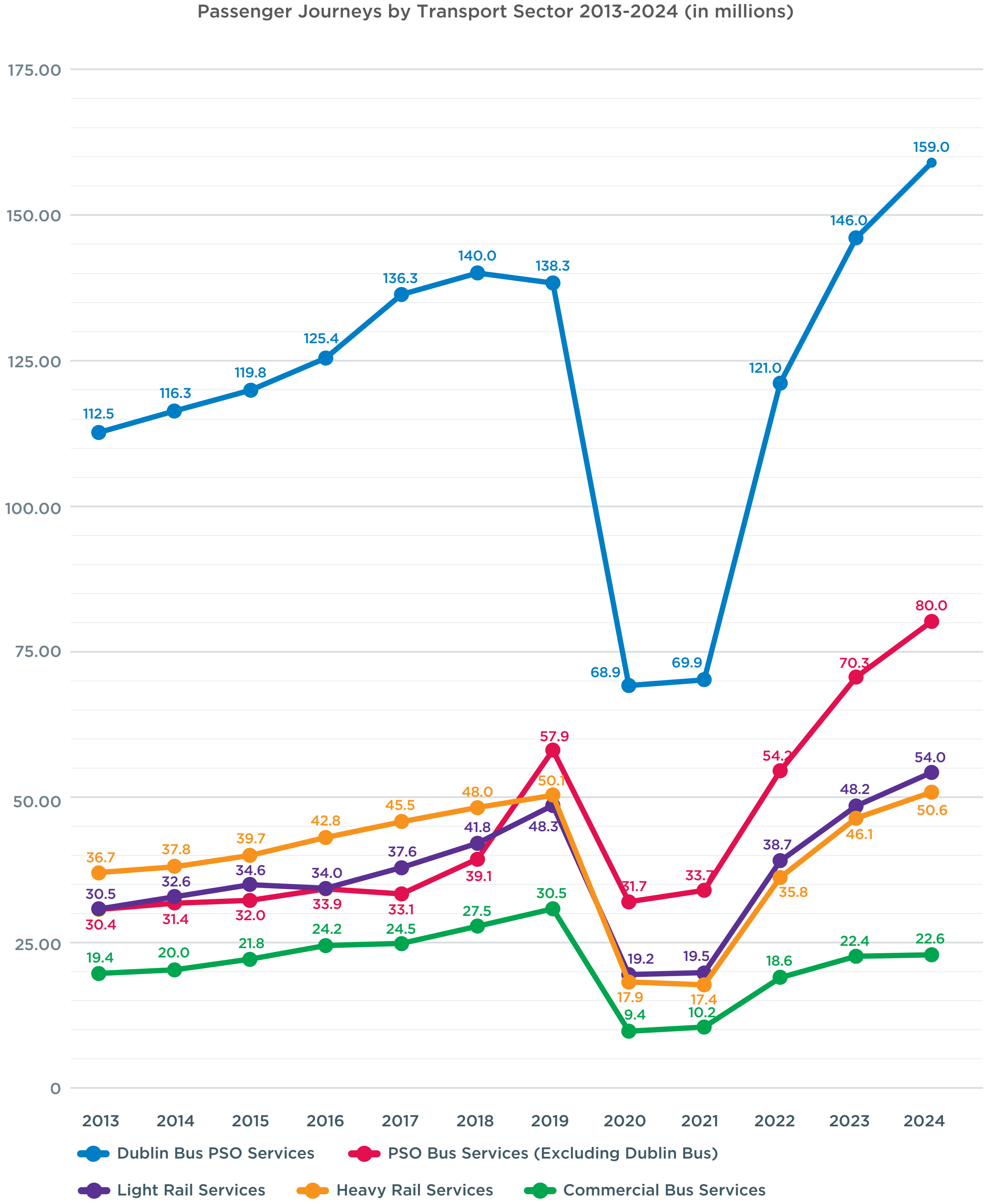


Table 2B: Change per Year in Commercial Passenger Journeys by Area

Change from previous Year	Non-GDA Services	GDA Services
2013	-	0.0%
2014	-4.4%	7.6%
2015	5.1%	11.8%
2016	8.3%	12.4%
2017	-2.4%	4.2%
2018	1.3%	9.1%
2019	12.4%	10.3%
2020	-59.4%	-73.1%
2021	18.4%	1.1%
2022	48.3%	109.0%
2023	10.5%	25.1%
2024	-1.4%	2.1%

Figure 2.5: Comparison of PSO[3] and Commercial Service Total Annual Passenger Journeys by Year 2013-2024 (in millions)



[3]NTA-Bus-and-Rail-Statistics 2020

Figure 2.6: Comparison of Change in Passenger Journeys by Transport Sector by Year 2013-2024

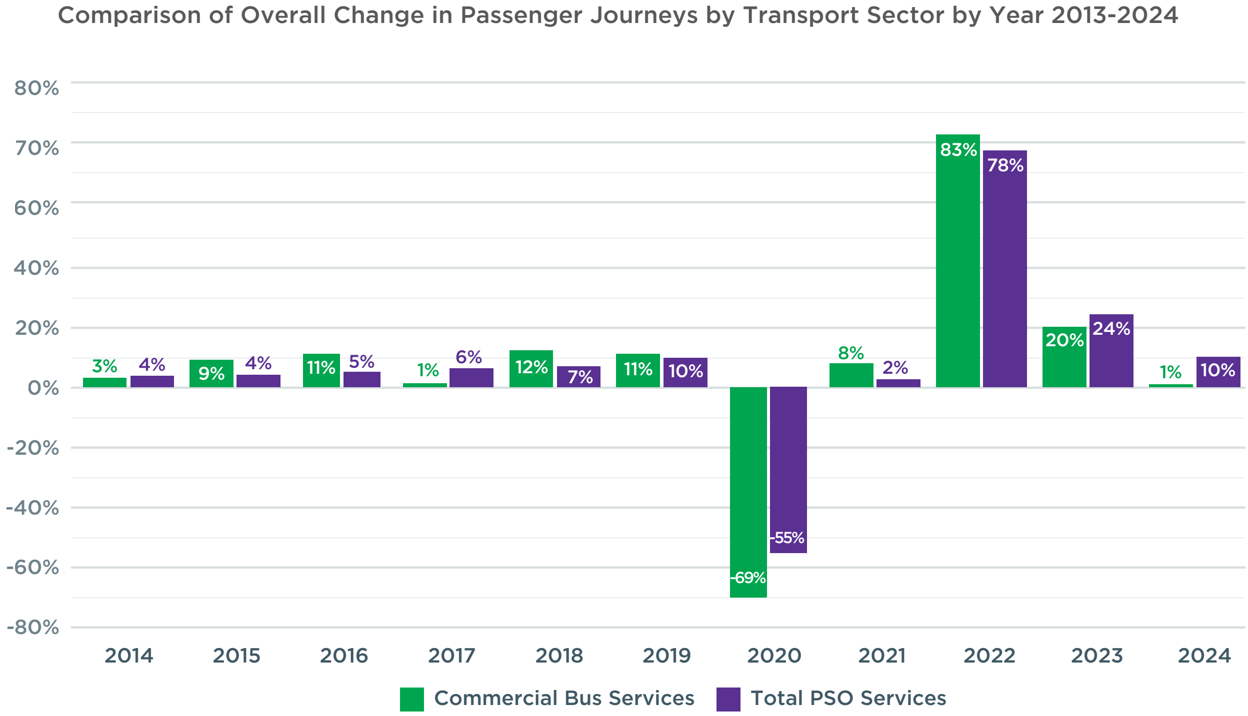


Figure 2.7: Comparison of the Percentage Increase in Total Passenger Journeys by Transport Sector 2013 – 2024

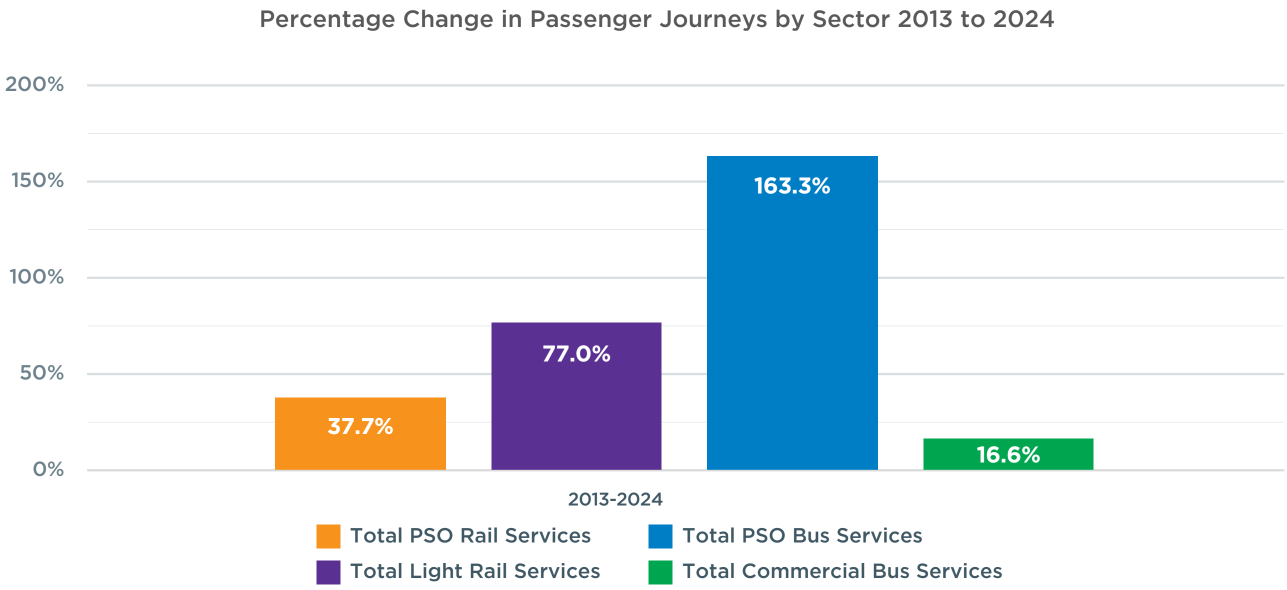


Figure 2.8: Comparison of the Changes since COVID-19 in Total Passenger Journeys by Transport Sector (2020 – 2024)

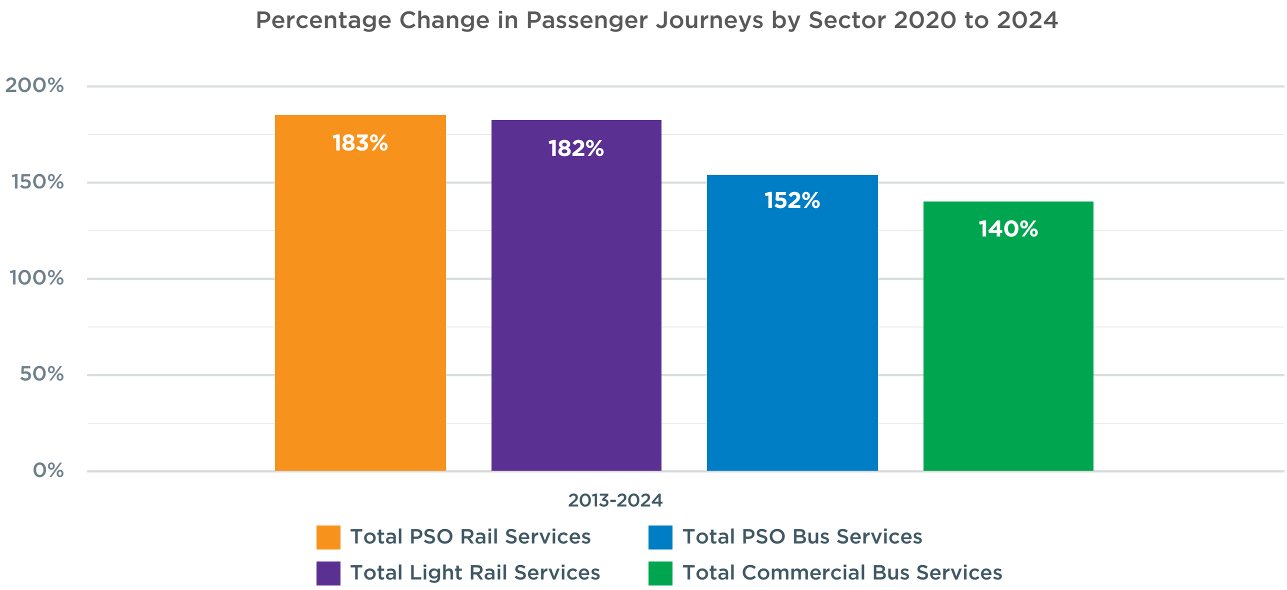
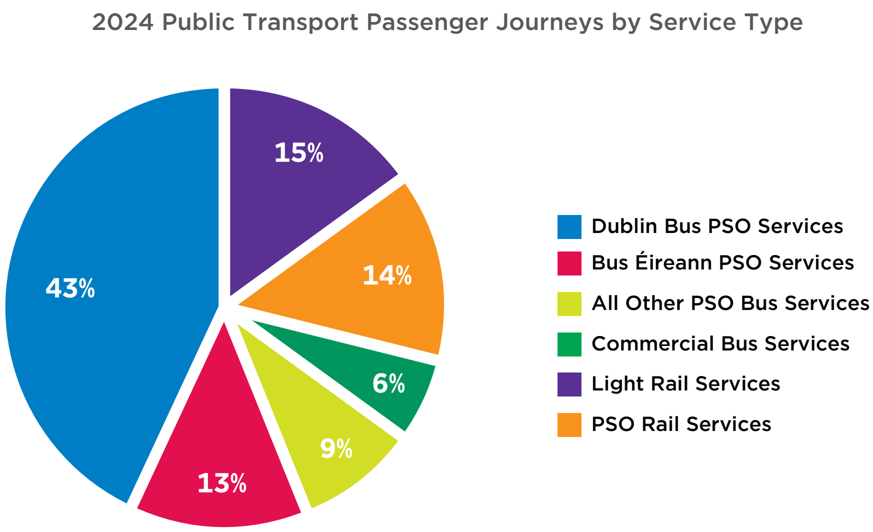


Figure 2.9: Comparison of the Percentage Share of Total Passenger Journeys by Transport Sector 2024



Free Travel Passenger Journeys

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

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

Free travel is available on state-funded bus and rail transport, including Dublin Bus, Bus Éireann, Go-Ahead Ireland, Local Link, Iarnród Éireann, Luas services, and private operators under contract to the Authority. Free travel is also available on a number of commercial bus services. Operators that are part of the Free Travel Scheme receive payments for the fare forgone for carrying passengers entitled to free travel.

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

Figures 2.10 and 2.12 show the trend and breakdown of estimated FTP journeys. In 2024, estimated FTP journeys accounted for approximately 18% of all journeys, maintaining the same proportion as in 2023. Despite this national stability, there was an increase in estimated FTP journeys on GDA services in 2024, continuing the upward trend since 2020. On Non-GDA services, the share of FTP journeys decreased to about 34% in 2024, down from 37% in 2023 and from 40% in 2019. On GDA services, estimated FTP journeys increased to around 11% of all journeys in 2024, up from 10% in 2023.

Between 2019 and 2020, the national estimated FTP journeys decreased by 64%, which was slightly less than the 69% decline in total passenger journeys. During COVID-19, estimated FTP journeys rose to 23% of all journeys in 2020 and increased further to 26% in 2022. This was due to a less severe drop in FTP journeys on commercial bus services compared to fare-paying journeys (see Figure 2.10). In 2024, the share of FTP journeys remained unchanged at 18%, with the total number of estimated FTP journeys again reported at its lowest level since data collection began (excluding the COVID-19 period), at 4 million journeys. Although the 18% share was maintained nationally, there was a decline in FTP journeys on Non-GDA services, while estimated FTP journeys on GDA services increased for a third consecutive year (see Figure 2.12).

A significant divide between estimated FTP journeys on Non-GDA and GDA services is evident. Apart from the spike during 2019–2020, the share of estimated FTP journeys on Non-GDA services has continued to decline as a percentage of total journeys, despite an increase in the absolute number of estimated FTP journeys. In contrast, GDA services have experienced more fluctuation, with both upward and downward trends.

Table 2C shows the percentage share of all passenger journeys which were estimated FTP journeys in that area. Figure 2.13 shows the divide of estimated FTP journeys between GDA and Non-GDA. It should be noted that the free travel figures have been calculated by multiplying the percentage of estimated FTP journeys by the total passenger journeys on the respective routes. The figures should therefore be taken as indicative of trends only, rather than as precise calculations. The percentage of free travel passengers is estimated by the operators.

Figure 2.10: Comparison of Estimated FTP Journeys and Total Passenger Journeys (in millions) 2013-2024

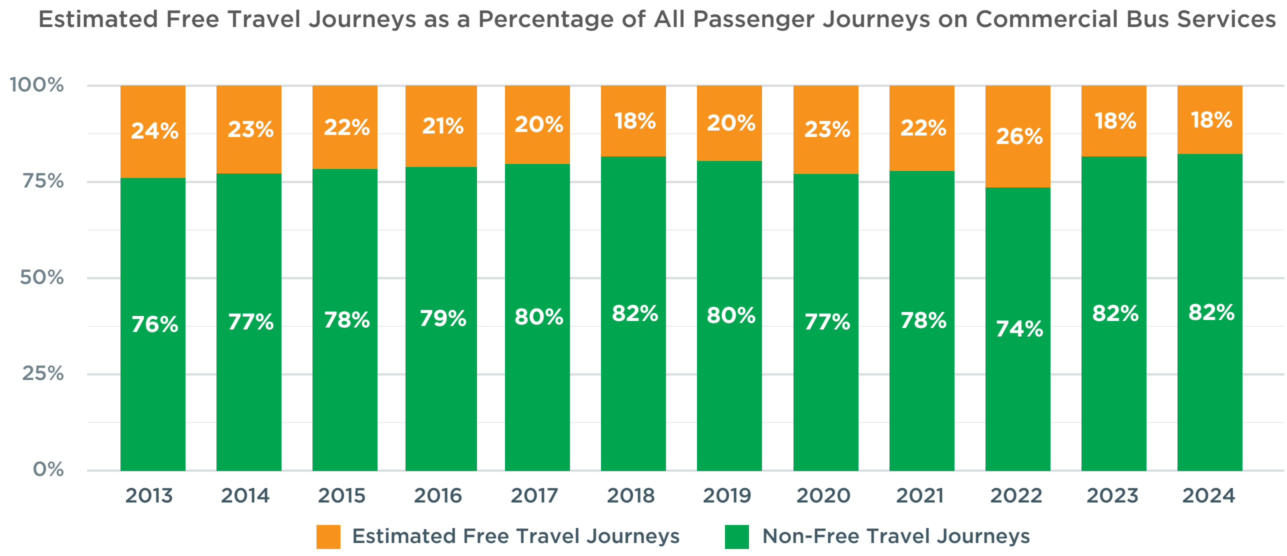


Figure 2.11: Comparison of Estimated FTP Journeys and Total Passenger Journeys (in millions) 2013-2024

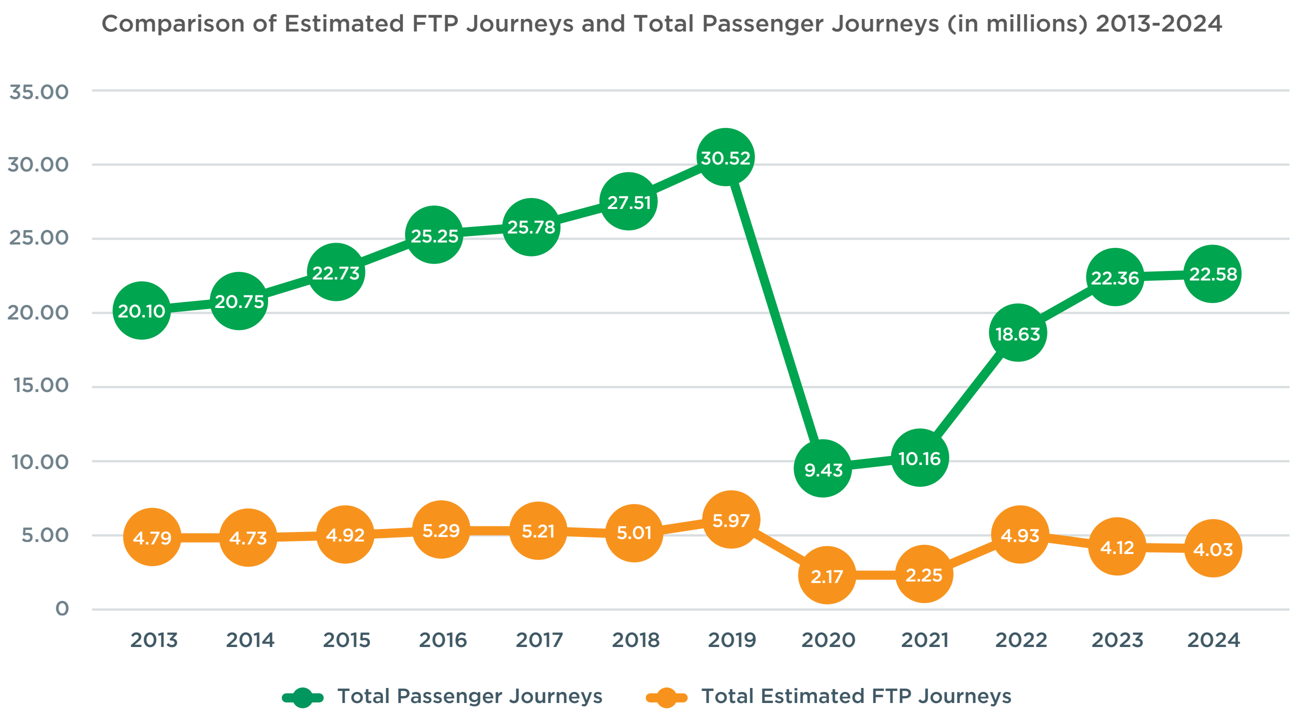


Figure 2.12: Estimated Number of Free Travel Passenger Journeys on Commercial Bus Services (in millions)

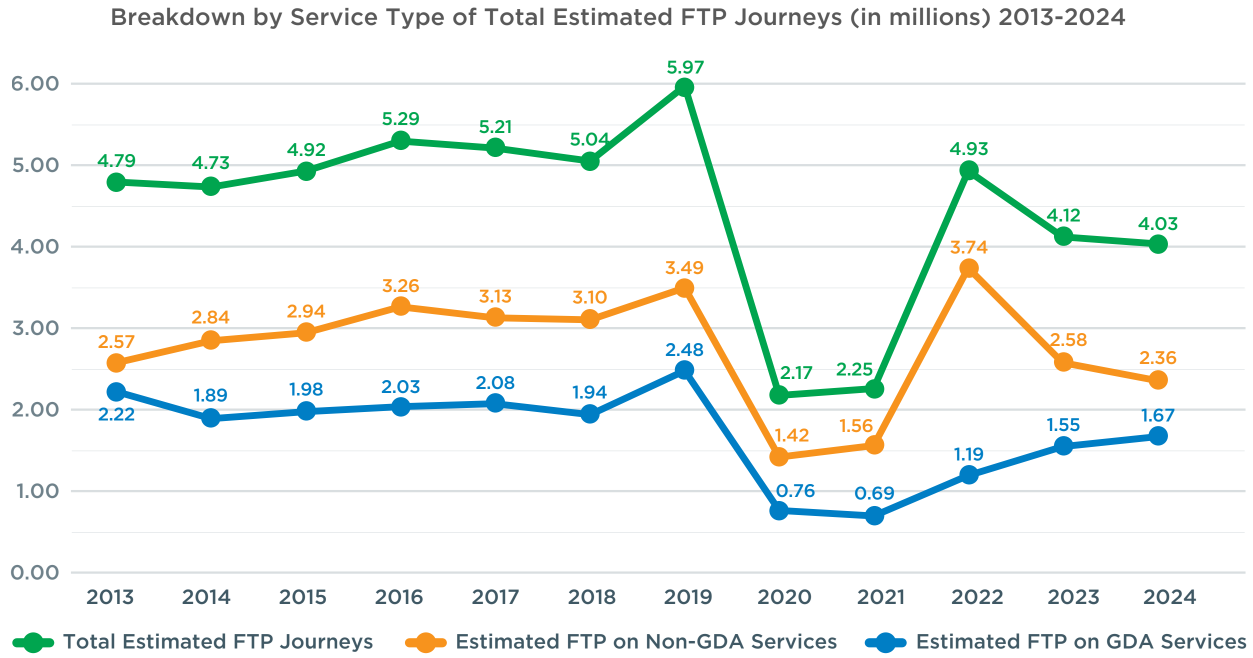
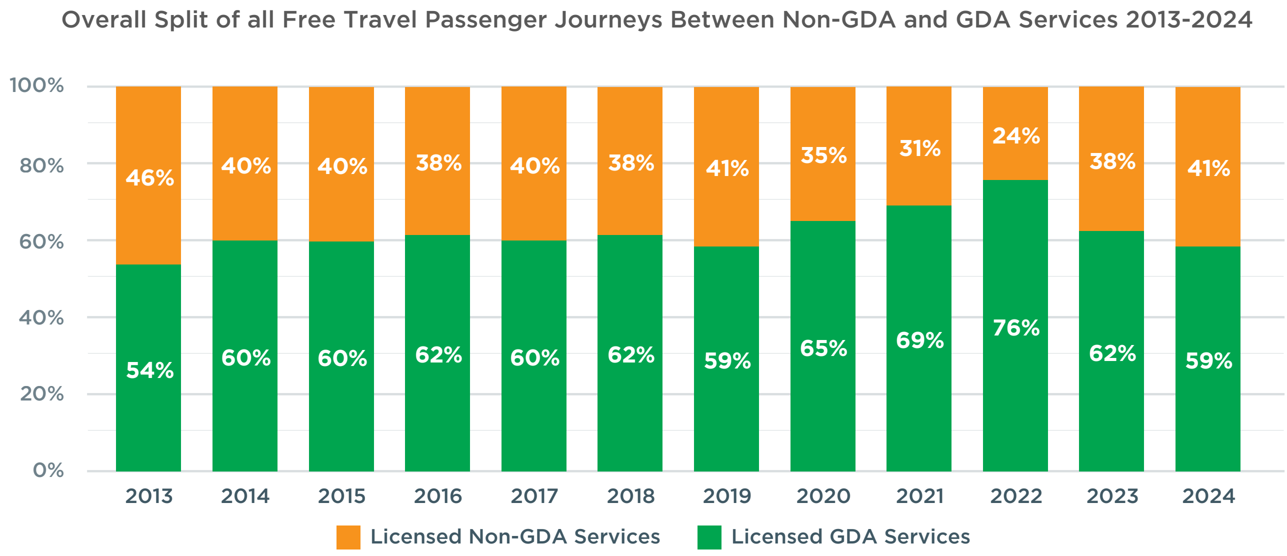


Table 2C: Percent of All Passenger Journeys in an Area which are Estimated Free Travel Passenger Journeys.

Year	Non-GDA Services (% of All Passenger Journeys which FTP Journeys)	GDA Services (% of All Passenger Journeys which FTP Journeys)
2013	36%	17%
2014	42%	13%
2015	42%	13%
2016	43%	12%
2017	42%	11%
2018	39%	10%
2019	40%	11%
2020	39%	13%
2021	37%	12%
2022	59%	10%
2023	37%	10%
2024	34%	11%
Change in Total 2013-2019	35.7%	11.8%
Change in Total 2020-2024	-32.5%	-32.5%
Change in Total 2013-2024	-8.4%	-24.6%

Figure 2.13: Overall Split of the Total Estimated FTP Journeys on Commercial Bus Services between Non-GDA and GDA Services



3

Scheduled Vehicle Kilometres

'Scheduled vehicle kilometres' indicate the total number of vehicle kilometres intended to be operated based on the licensed timetables. For 2020 to 2024, operators were asked to provide the actual number of vehicle kilometres operated. This was due to some services being partly or completely suspended up to and including 2022, as well as the use of additional vehicles to accommodate public transport capacity restrictions between 2020 and 2022. This approach was maintained through 2024 to enable comparison with the COVID-19 years that immediately preceded it. Therefore, all references below are to vehicle kilometres, allowing for both metrics to be considered.

In 2024, vehicle kilometres decreased by 0.4% to 89 million kilometres or 88% of the 2019 peak. Despite the relatively similar total vehicles kilometres compared to 2023 there has been a large change in the composition of those kilometres, with a decrease in the kilometres operated by Non-GDA services and proportional increase in kilometres for GDA services. GDA services now represent 79% of all commercial bus vehicle kilometres compared to 75% in 2023. Overall, the commercial bus vehicle kilometres accounted for 37% of all public transport vehicle kilometres including light and heavy rail. This was second to PSO bus services, which accounted for 53%. However, in the same year commercial bus services accounted for 5% of the overall passenger journeys. Combined totals for 2024 show public transport vehicle kilometres have increased 36% since 2013.

Between 2013 and 2019, commercial bus services provided the greatest number of public transport service vehicle kilometres[4] across all public transport. PSO bus vehicle kilometres have increased every year since 2013 when data was first recorded for commercial bus services. In 2020, the number of vehicle kilometres provided by commercial bus services dropped to 67% of 2019 levels. Since then, PSO bus services have overtaken commercial bus services in providing the greatest number of public transport vehicle kilometres. While the commercial bus service vehicle kilometres have increased at the greatest rate since 2020, PSO bus services were the only public transport sector that had no decrease in vehicle kilometres between 2019 and 2020. In fact, PSO bus vehicle kilometres increased by 4% between those years. See Figures 3.3 and 3.4.

Overall, commercial bus vehicle kilometres have increased by 11% between 2013 and 2024. This increase is less than the 15% increase in passenger journeys over the same period. Non-GDA services even through COVID-19 to 2024 have seen much less change year on year for public transport vehicle kilometres. Despite growth in 2023, GDA vehicle kilometres are still below the 2019 peak. Overall, since 2020 vehicle kilometres have increased 32.5%. Passenger journeys increased 140%. This gives an indication that increases in vehicles kilometres have been driven by demand in the market. The increase in vehicle kilometres is not evenly distributed, with GDA services having increased by 45% since 2020, while Non-GDA services remained the same. Figure 3.1 provides the trend in vehicle kilometres provided by all commercial bus services, as well as separately by GDA and Non-GDA services from 2013 to 2023. Table 3A shows the overall change per year and the breakdown between GDA and Non-GDA services. Table 3B compares the overall total change for all transport sectors in vehicle kilometres.

[4] Taxi services and School Bus Transport Schemes services are not included here.

Figure 3.1: Comparison of Scheduled Vehicle Kilometres for GDA and Non-GDA services by Year 2013-2024 (in millions)

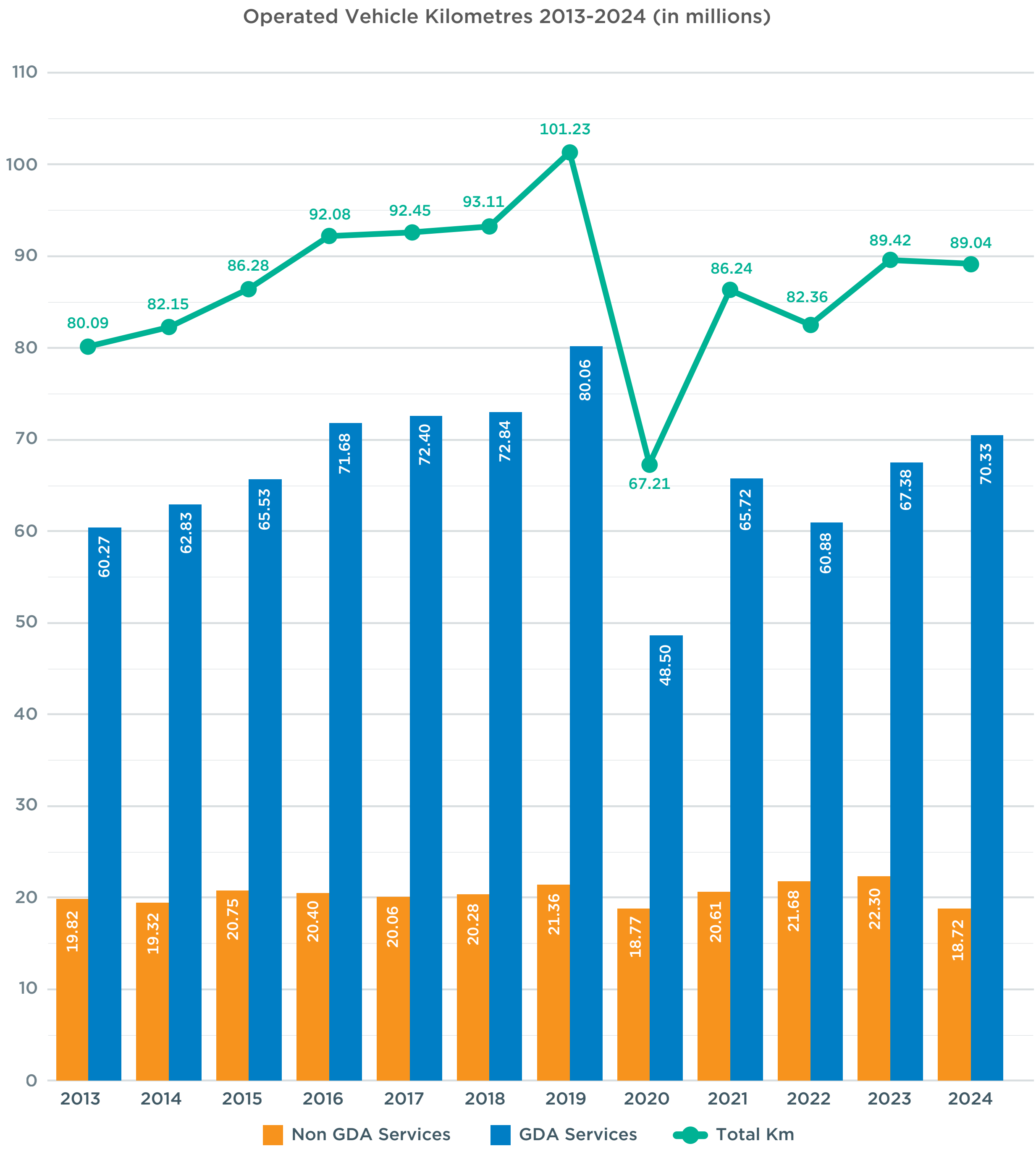


Table 3A: Percentage Breakdown of Total Scheduled Vehicle Kilometres (in millions)

Year	Total Km	Overall Change from Previous Year	Non-GDA Services	GDA Services	% of Total Km: Non-GDA Services	% of Total KM: GDA Services
2013	80.09	0%	19.82	60.27	25%	75%
2014	82.15	3%	19.32	62.83	24%	76%
2015	86.28	5%	20.75	65.53	24%	76%
2016	92.08	7%	20.40	71.68	22%	78%
2017	92.45	0%	20.06	72.40	22%	78%
2018	93.11	1%	20.28	72.84	22%	78%
2019	101.23	8.7%	21.36	80.06	21%	79%
2020	67.21	-33.6%	18.77	48.50	28%	72%
2021	86.24	28.3%	20.61	65.72	24%	76%
2022	82.36	-4.5%	21.68	60.88	26%	74%
2023	89.42	8.6%	22.30	67.38	25%	75%
2024	89.04	-0.4%	18.72	70.33	21%	79%

Figure 3.2: Comparison of Vehicle Kilometres by Transport Sector as a Percentage of the Total Kilometres for 2013 and 2024.

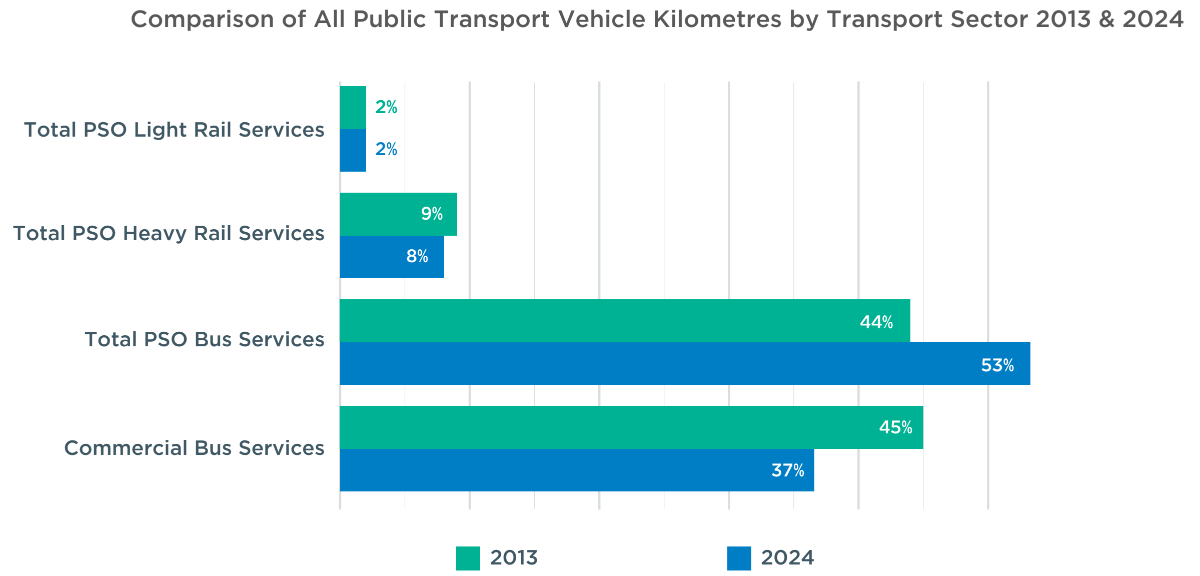


Figure 3.3: Comparison of Total Vehicle Kilometres by Transport Sector 2013-2024 (in millions)

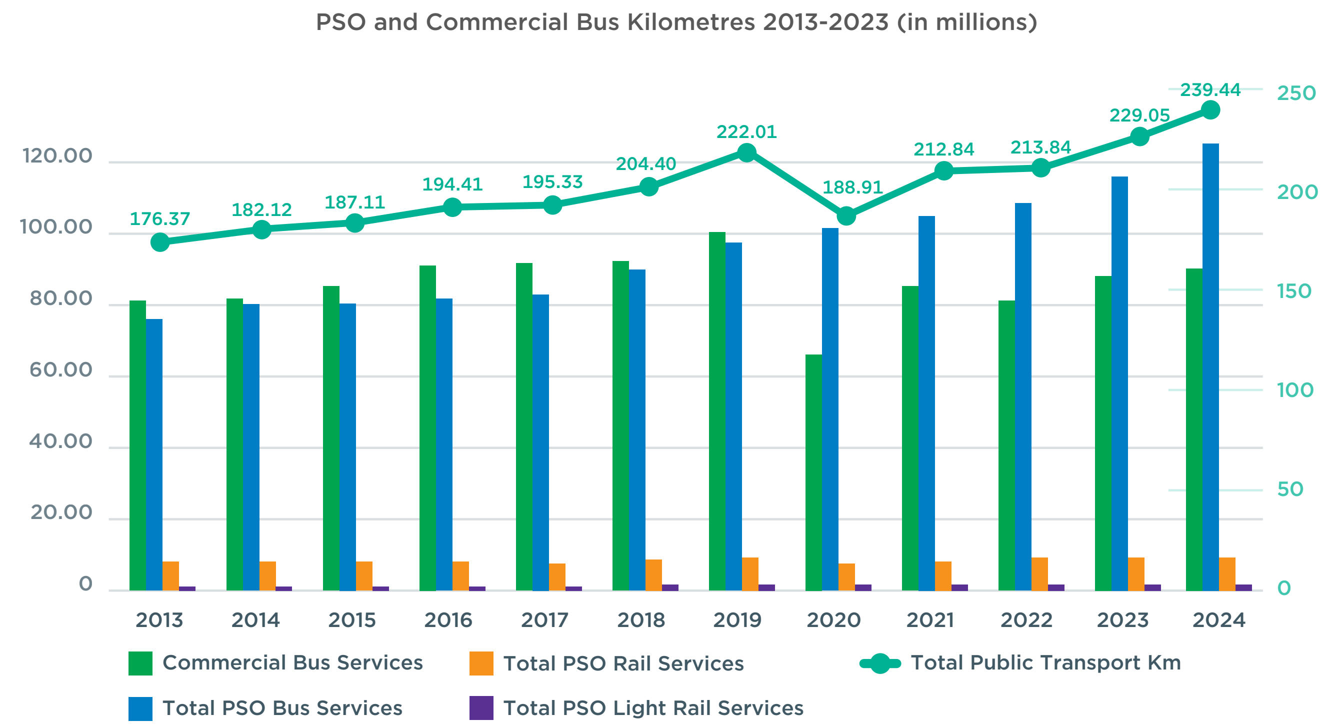
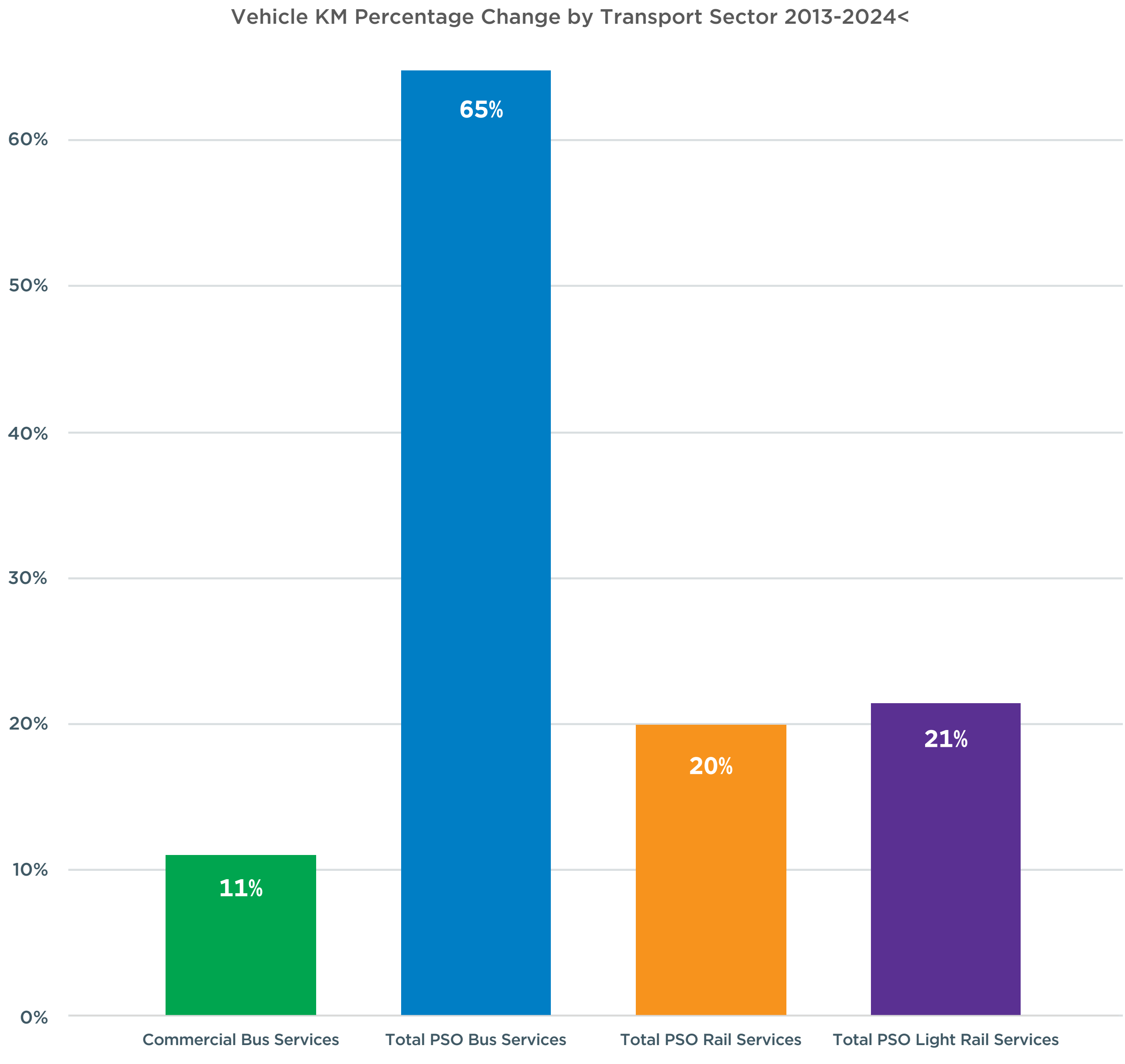


Table 3B: Comparison of the Overall Total Change in Vehicle Kilometres by Year 2013-2024

Year	Total KM All Services (in millions)	Change in KM between Years (in millions)	Percent Change Per Year	Increase in KM since 2013 (in millions)	Percent Change Since 2013
2013	176.37	-	-	-	-
2014	182.12	5.75	3%	5.75	3%
2015	187.11	4.99	3%	10.74	6%
2016	194.41	7.30	4%	18.04	10%
2017	195.33	0.91	0%	18.96	11%
2018	204.40	9.08	5%	28.03	16%
2019	222.01	17.61	9%	45.64	26%
2020	188.91	-33.10	-15%	12.54	7%
2021	212.16	23.25	12%	35.78	20%
2022	213.84	1.69	1%	37.47	21%
2023	229.05	15.20	7%	52.68	30%
2024	239.44	10.40	5%	63.07	36%

Figure 3.4: Comparison of Change in Total Vehicle Kilometres by Transport Sector 2013-2024



4

Commercial Bus Services Revenue and Ticketing

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

TaxSaver Ticketing

The TaxSaver Commuter Ticket Scheme allows employees to avail themselves of public transport commuter tickets if they are travelling to work by public transport. The scheme involves employers providing employees with public transport commuter tickets, while saving on employer PRSI payments. Employees participating in the scheme benefit from reduced tax and PRSI payments. The scheme is generally known as the TaxSaver scheme, but other names can be used by individual public transport operators.

Leap Card

The Leap Card was introduced in late 2011 and is an integrated smart card which is available for both PSO services and commercial bus services. By 2019, there were 13 operators accepting Leap Card. In 2024, 38 commercial operators accepted Leap Card on their commercial bus services. These included Aircoach, Ashbourne Connect, Bus Éireann, City Direct Galway, Citylink, Collins Coaches, Dave Long Coach Travel, Dualway Coaches, Express Bus, JJ Kavanagh, Matthews Coaches, Mortons Coaches, Dublin Express, Swords Express, St. Kevin's Bus and Wexford Bus.

Free Travel Revenue

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

Overall, Free Travel Scheme payments to commercial bus operators are set out below. These include payments for free travel within the State for both Irish and Northern Irish passengers, as well as payments for cross-border free travel. Total revenue is provided both inclusive and exclusive of Free Travel Payments.

Grant Aid 2020-2022

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

Young Adult and Student Card Fares Scheme

In 2022, the Authority launched the YASC Fares Scheme. Participation in the Fares Scheme is on a voluntary basis. Over 40 commercial bus operators opted to participate in 2022. This had increased to 46 operators in 2023 and now decreased slightly to 43 in 2024. As part of the YASC Fares Scheme, commercial bus operators receive compensation for the fare forgone for offering the 50% discount for 19-25-year-olds and to full-time third level students. Commercial bus operators may have more than one regular licence in the Fares Scheme, as well as having licences which are not in the Fares Scheme. Operator revenue includes payments as part of the Fares Scheme.

The TFI Go app

This app allows passengers to buy tickets for various bus services around Ireland directly from their phone. The ticket is downloaded to the app and can be used to travel straight away. 30 Operators were providing ticketing through the TFI Go app in 2024.

Passenger Ticket Revenue and Ticketing Types

In 2024, overall ticket revenue increased nationally by 4% when compared to 2023, bringing it to 99% of the total revenue in 2019. See Table 4A. The 2024 total ticket revenue was 158% of that reported for 2013. This followed a 56% decrease in revenue between 2019 and 2020. Passenger journeys nationally increased by 140% between 2020 and 2024.

Table 4A shows the total ticket revenue and Free Travel Scheme payments for the commercial bus services sector between 2013 and 2024. Figure 4.1 shows the payments as a percentage of the total revenue. The Free Travel Scheme payments are inclusive of payments for cross border travel and international foreign free travel payments.

Accounting for Inflation

In 2024, total revenue of €218.6m suggests that post COVID-19 revenue growth has almost returned to peak total revenue levels in 2019 of €219.99m, as highlighted in the previous section. However, this can be misconstrued as the figures shown in Table 4A do not account for the high levels of inflation that were observed post 2020 as shown in Table 4B.

Table 4C shows the total ticket revenue, adjusted for inflation to equivalent 2024 levels, for the commercial bus services sector between 2013 and 2024. After adjusting for inflation, the difference between the 2019 peak and 2024 total revenue went from a decrease of €1.39m to a decrease of €45.17m. This shows that after adjusting for inflation the real-world total revenue is still over 8% lower than the 2019 peak revenue and has not recovered to pre COVID-19 levels.

Figure 4.2 shows the increased divergence in historic figures and adjusted for inflation figures due to high levels of inflation for pre-2020.

Table 4A: Commercial Bus Services Annual Passenger Revenue (in millions)

Year	Total Annual Ticket Revenue	Total Annual Free Travel Payments	Total Revenue	Change in Total Revenue per Year
2013	€115.89	€20.05	€135.94	-
2014	€129.55	€20.10	€149.65	10%
2015	€143.19	€20.42	€163.61	9%
2016	€155.62	€20.49	€176.11	8%
2017	€157.69	€20.10	€177.78	1%
2018	€173.88	€29.79	€203.67	15%
2019	€186.56	€33.42	€219.99	8%
2020	€62.25	€34.69	€96.94	-56%
2021	€67.21	€32.31	€99.52	3%
2022	€140.11	€32.06	€172.16	73%
2023	€177.99	€32.46	€210.45	22%
2024	€183.46	€35.14	€218.60	4%

Table 4B: Irish Historic Inflation Rates

2.5	Irish Historic Inflation Rates (2013-2024)
2013	0.24%
2014	-0.24%
2015	0.12%
2016	0.00%
2017	0.36%
2018	0.60%
2019	1.32%
2020	-0.95%
2021	5.62%
2022	8.14%
2023	4.60%
2024	1.40%

Table 4C: Commercial Bus Services Annual Passenger Revenue (in millions), Adjusted for Inflation from 2013

Year	Total Revenue	Total Revenue (Adjusted for inflation to 2024 Levels)	Change in Total Revenue per Year (Adjusted for Inflation to 2024 Level)
2013	€135.94	€164.76	-
2014	€149.65	€180.93	10%
2015	€163.61	€198.29	10%
2016	€176.11	€213.19	8%
2017	€177.78	€215.21	1%
2018	€203.67	€245.66	14%
2019	€219.99	€263.76	7%
2020	€96.94	€114.71	-57%
2021	€99.52	€118.90	4%
2022	€172.16	€194.74	64%
2023	€210.45	€220.13	13%
2024	€218.60	€218.60	-1%
2019-2024	-€1.39	-€45.17	-8%

Figure 4.1: Commercial Bus Services Comparison of Revenue Types by Year 2013-2024

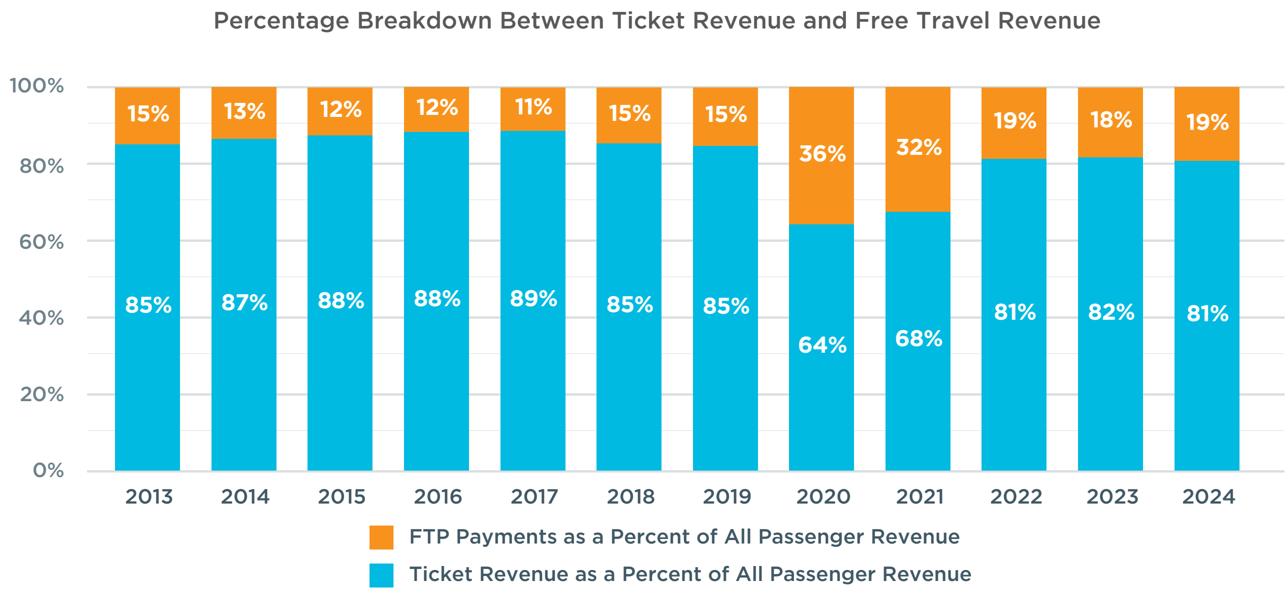
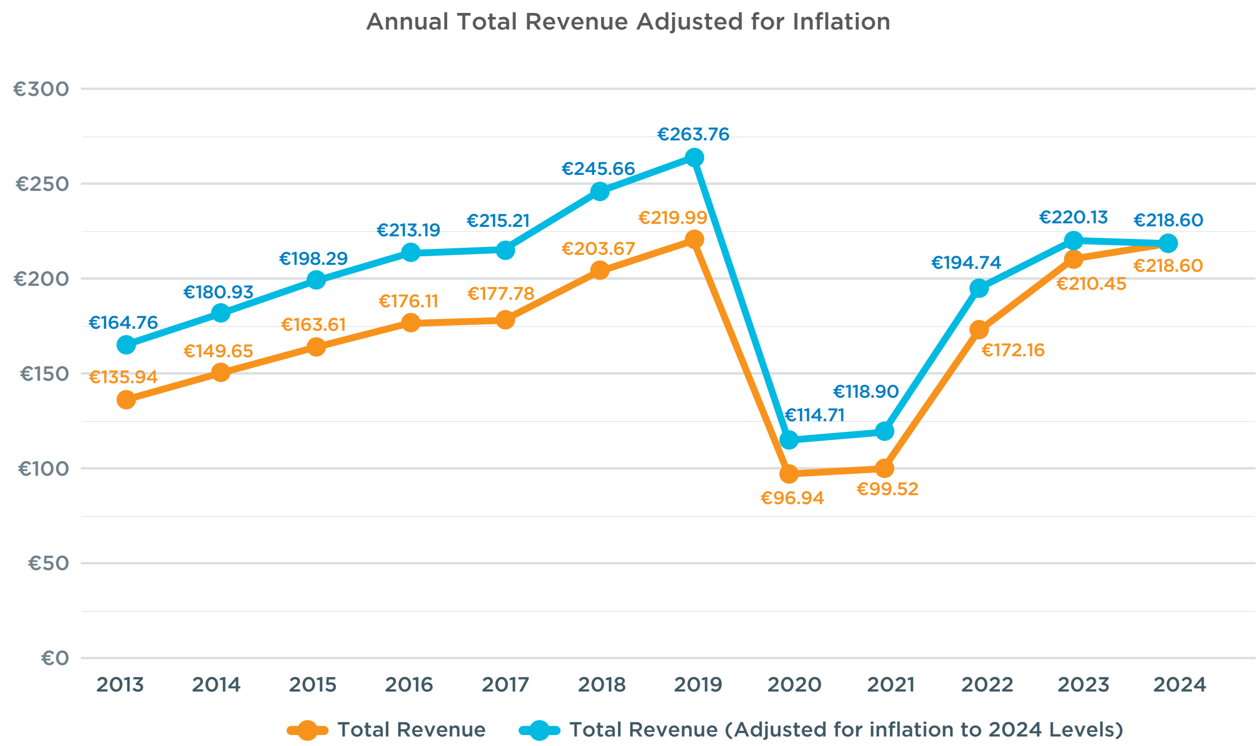


Figure 4.2: Commercial Bus Services Comparison of Annual Total Revenue and Adjusted to 2024 Levels Total Revenue 2013-2024 (in millions)



5

Commercial Operator Fleet Size

The commercial fleet referred to below is described in terms of the total number of vehicles used, as well as the number used on a full-time basis to provide commercial bus services. These figures were obtained by asking commercial bus operators what percentage of time each vehicle was used per licensed service. This approach illustrates not only the overall vehicle count but also the extent to which these vehicles were dedicated solely to commercial bus operations.

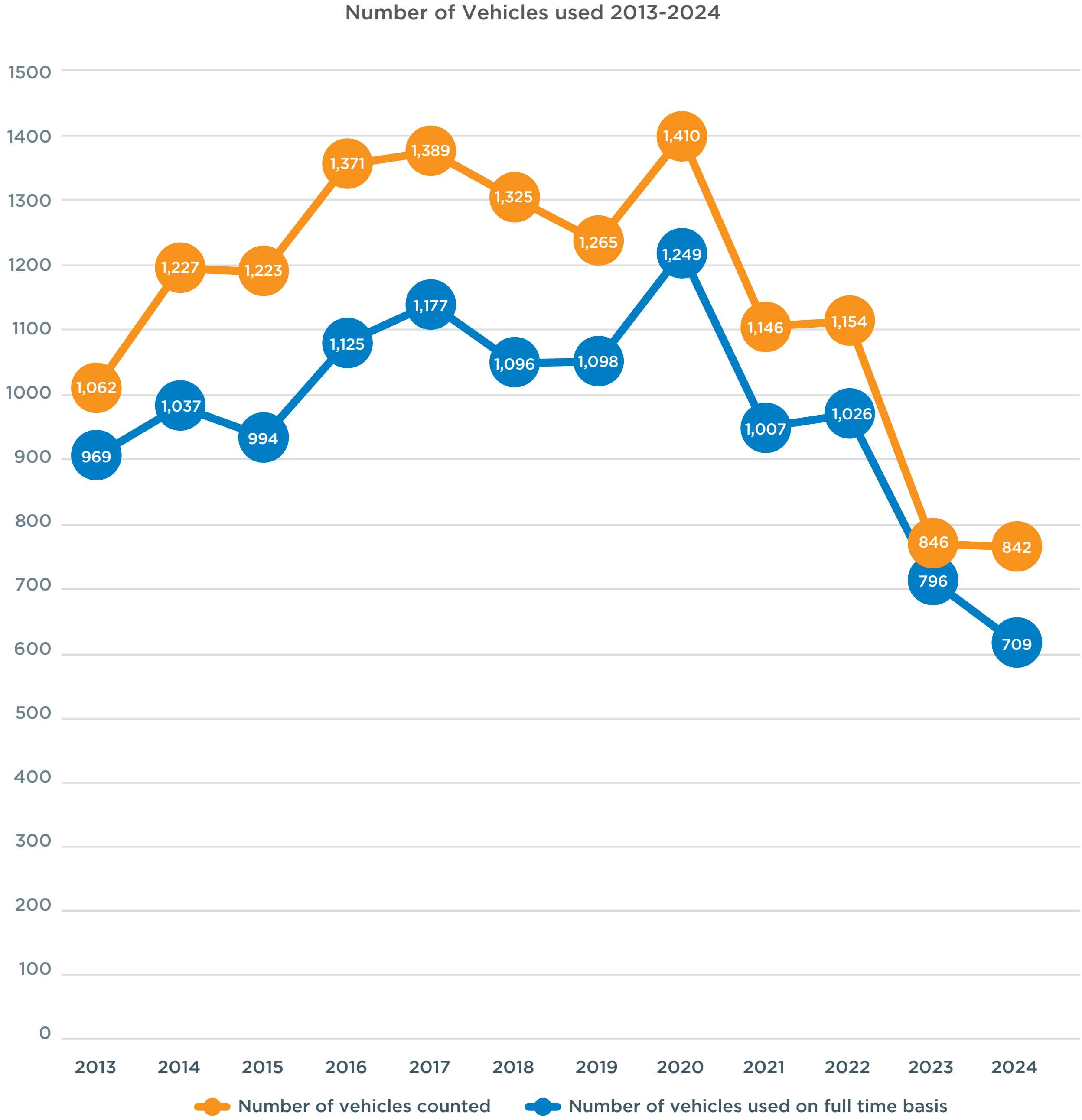
The term "vehicles" encompasses a broad range, including inter-city coaches, low-floor urban double-decker and single-decker buses, as well as midi and mini-buses. These vehicles vary widely in passenger seat capacity.

From 2023, operators were asked for the first time to provide information on a vehicle-by-vehicle basis to detail the percentage use of each particular vehicle for each particular licence held. Previously, the data were not gathered by individual vehicles. For this reason, the 2023-2024 data provide more accuracy than previous years. The peak vehicle requirement ("PVR") or the maximum number of vehicles needed to provide the timetables for all the licensed services, was used since 2023 to calculate the total number of full-time vehicles needed. This measure was used as it was provided on a licence-by-licence basis since 2023. Due to this difference, the number of full-time vehicles would tend to be lower than previously provided by operators and therefore, comparison of post-2023 data with trends for previous years' data will be less robust. In the future, the accuracy will be greater than previously.

The data shows that in 2024, the lowest number of vehicles was used to provide commercial bus services, which had recorded the highest average age since 2013. The Peak Vehicle Requirement (PVR) was 709 vehicles. This represents a decrease of 87 vehicles, or 11%, since 2023 in the number of vehicles providing these services on a full-time basis. In contrast, the total number of vehicles used declined by only 4, essentially no change, over the same period. See Figure 5.1 below.

It is important to note that more detailed data has been collected since 2023, and that the PVR of 709 vehicles in 2024 does not represent a year-round total. Fewer vehicles may be used at certain times of the year, as some commercial bus services do not operate daily or year-round (e.g., college term-only services).

Figure 5.1: Comparison of Operator's Total Number of Vehicles used by Year 2013-2024



Operators have been broken down by fleet size to give an indication of the scale and size of operators in the market. This also allows analysis and comparison between operators in terms of scale. Small operators are designated as those using 1-10 vehicles, medium operators are those using 11 to 40 vehicles, and large operators are those using more than 40 vehicles.

Figure 5.2 Operator Fleet Size Category by Number of Vehicles Used for Commercial Services in 2024

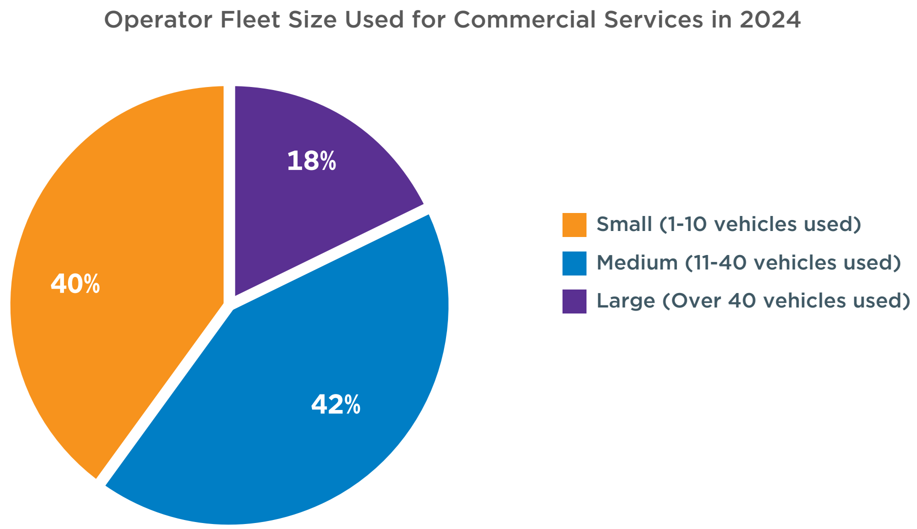


Figure 5.3: Comparison of Average Age of All Vehicles used by Year 2013-2024

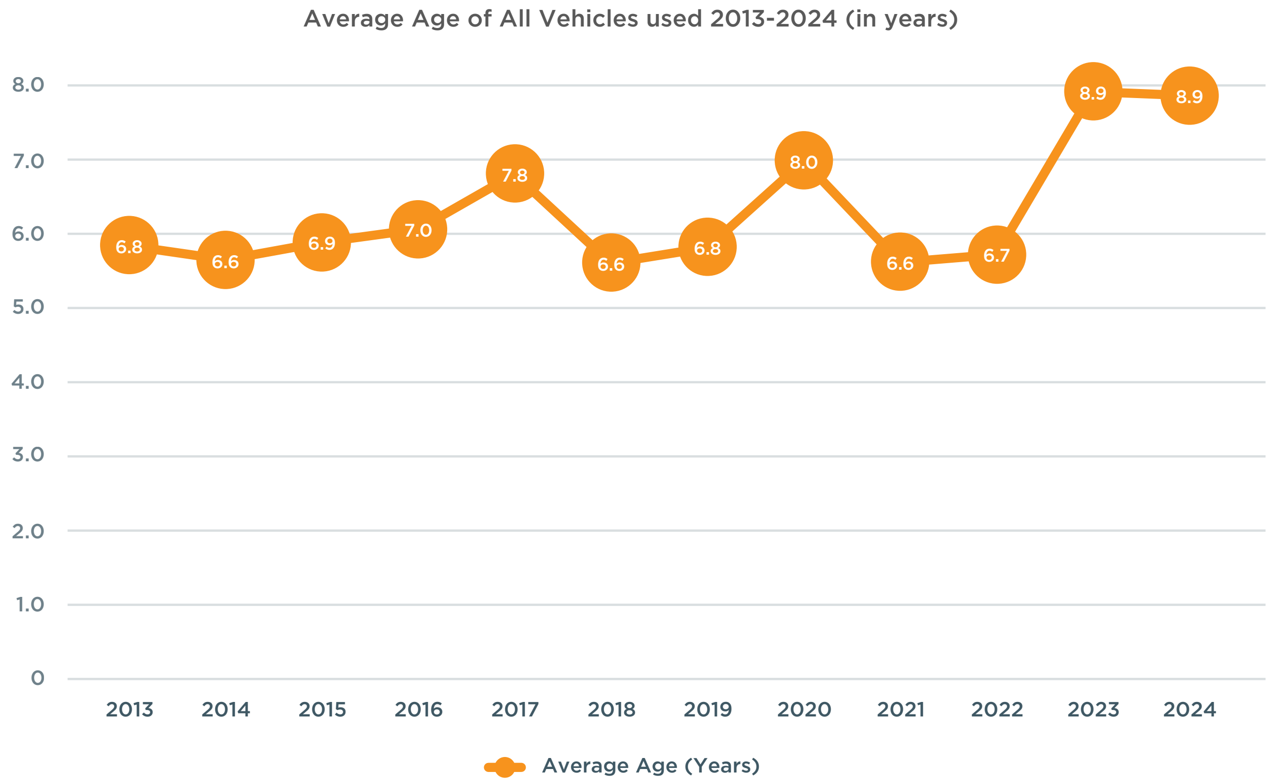
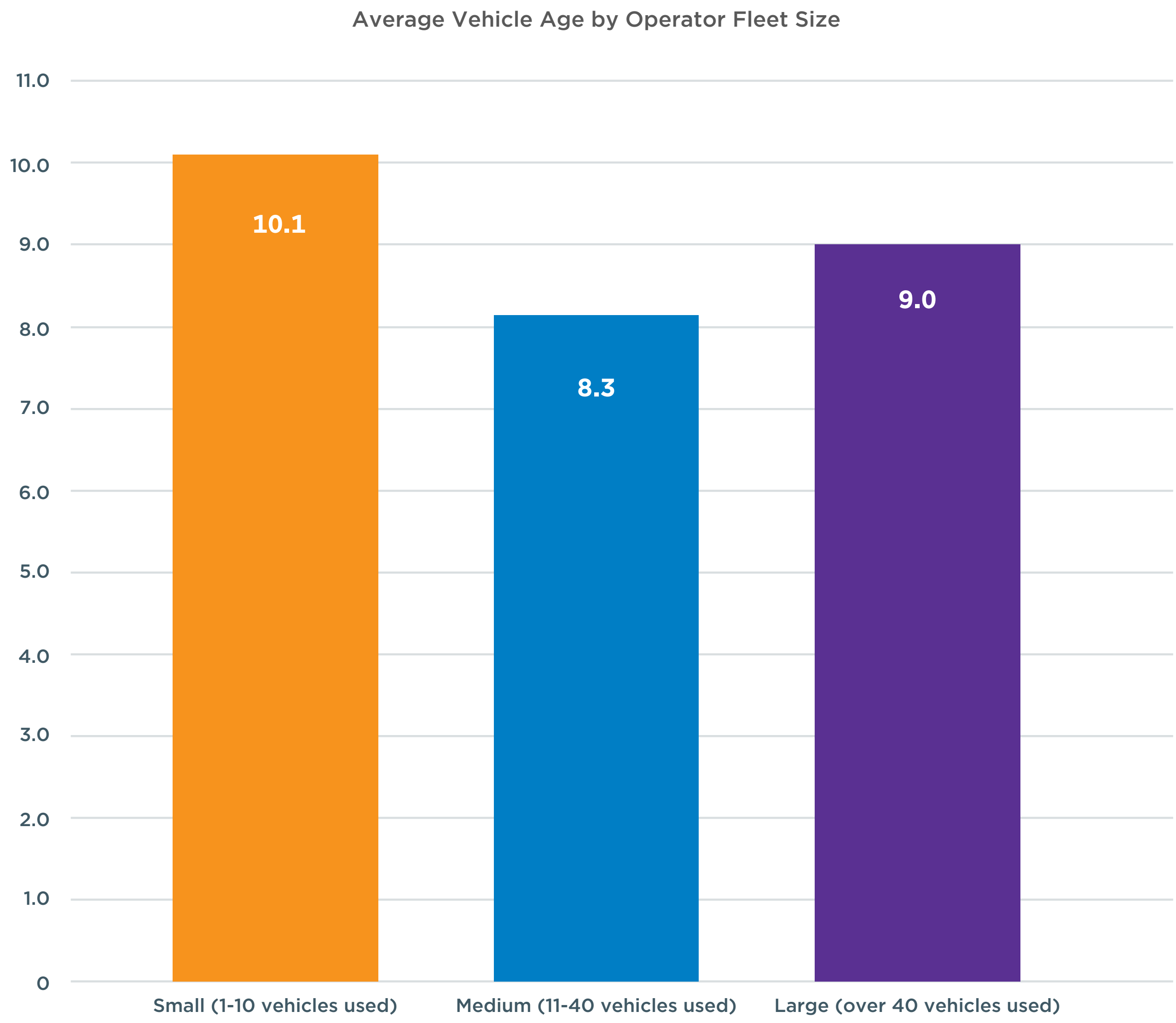


Figure 5.4: Comparison of Average Age by Operator Fleet Size, 2024



6

Accessibility of Operating Fleet and Vehicle Kilometres Provided

There are two key indicators of the accessibility of a fleet. These are the percentage of vehicles in a fleet which are accessible, and the proportion of all the vehicle kilometres these vehicles are used to provide. In 2019, the percentage of vehicle kilometres provided by accessible vehicles was requested on a per licence basis. This was done since 2023, therefore, these two years have been compared for the vehicle kilometres operated by accessible vehicles. This provided a more detailed view of the proportion of vehicle kilometres provided by accessible vehicles. Accessible vehicles provided approximately 51% of all vehicle kilometres in 2024, down from 56% in 2023 and 59% in 2019. The greatest decrease was on Non GDA services. See Figure 6.1.

Vehicle Kilometres Operated by Wheelchair Accessible Vehicles

More than half of all vehicle kilometres in 2024 were provided by wheelchair accessible vehicles, this includes operated vehicle kilometres both GDA and Non-GDA services. Figure 6.1 compares the percentage of vehicle kilometres operated by wheelchair accessible vehicles for the years 2024, 2023 and 2019.

Wheelchair Accessibility

The wheelchair accessibility of the commercial bus services fleet is examined below. It is important to highlight that a vehicle can be either low-floor wheelchair accessible or wheelchair accessible using a lift. There are differences in the accessibility standard of a vehicle for users depending on whether the vehicle is a low-floor vehicle or has a wheelchair lift. There are a small number of vehicles within the fleet that are accessible to wheelchairs by being both low-floor and having the use of a lift. Such vehicles have been counted as one accessible vehicle. Operators reported on the percentage of each commercial bus service which was provided by vehicles which were wheelchair accessible either by a low-floor or by having the use of a lift.

In 2024, 43% of all vehicles used were listed as wheelchair accessible. However, as shown in Figure 6.1, these vehicles provided 51% of total vehicle kilometres. This is a decrease from the peak in 2019, when both the proportion of accessible vehicles and the kilometres they operated were higher. There is an increase in the number of accessible vehicles compared to 2023, when 41% of vehicles were wheelchair accessible, however these vehicles accounted for 56% of the vehicle kilometres in 2023, 5% higher than 2024.

Figures 6.2 and 6.3 show that, in 2024, vehicles with wheelchair lifts made up 30% of the total commercial bus fleet, while low-floor accessible vehicles accounted for 12%. Therefore, among accessible vehicles only, those equipped with lifts were the dominant type, representing 71.5% of accessible vehicles, while low-floor vehicles made up the remaining 28.5%.

Low-Floor Vehicles Suitable for Wheelchair Access

Low-floor wheelchair accessible vehicles are vehicles where the access from the bus stop to part or all the on-board passenger area is direct from the bus stop apron. There are no steps involved, and a wheelchair lift is not used.

Alternatively, the vehicle may lower to kerb level and there may be an entry and exit access ramp for quick and safe wheelchair access. This enables easier access for wheelchair users and those with limited mobility. Accessing low-floor vehicles may also require that appropriate bus stop infrastructure, for instance kerbing of a specific height, is in place.

Vehicles with Lifts Suitable for Wheelchair Access

Vehicles with wheelchair lifts raise the individual and wheelchair above the steps of the vehicle and into the coach corridor area. This feature requires a deep space at the footpath which may not always be available. The use of wheelchair lifts increases the dwell time at bus stops and may not be as preferable for the passengers as the low-floor, roll-on, roll-off option. Vehicles with wheelchair lifts are often only able to carry one passenger using a wheelchair at any given time as only one designated wheelchair space may be available. It can also be the case that the customer using a wheelchair may need to inform the operator in advance that they wish to use the service, as vehicle seating may need to be removed to provide for a designated wheelchair space.

Figure 6.1: Comparison of Total Vehicle Kilometres Operated by Accessible Vehicles 2019, 2023 and 2024

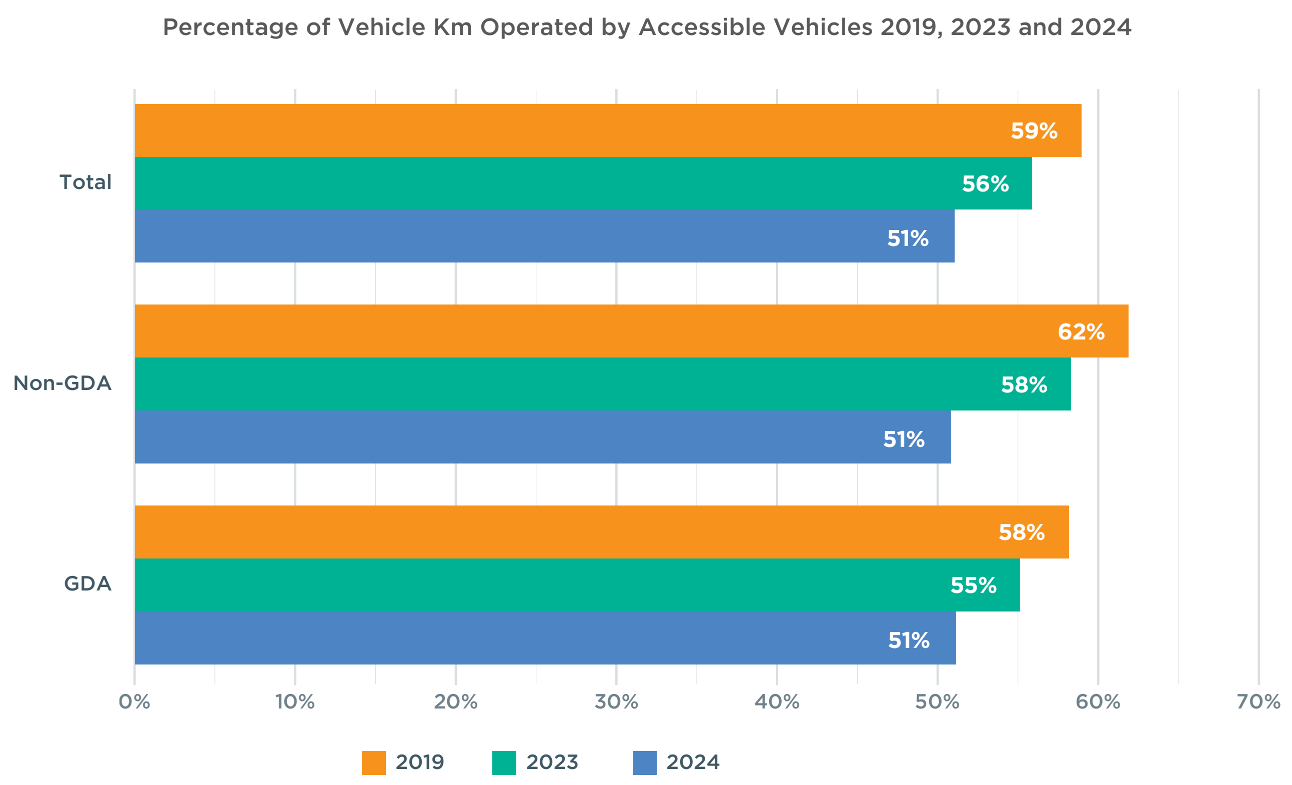


Figure 6.2: Comparison of Accessibility Level of Vehicles used by Year 2013-2024

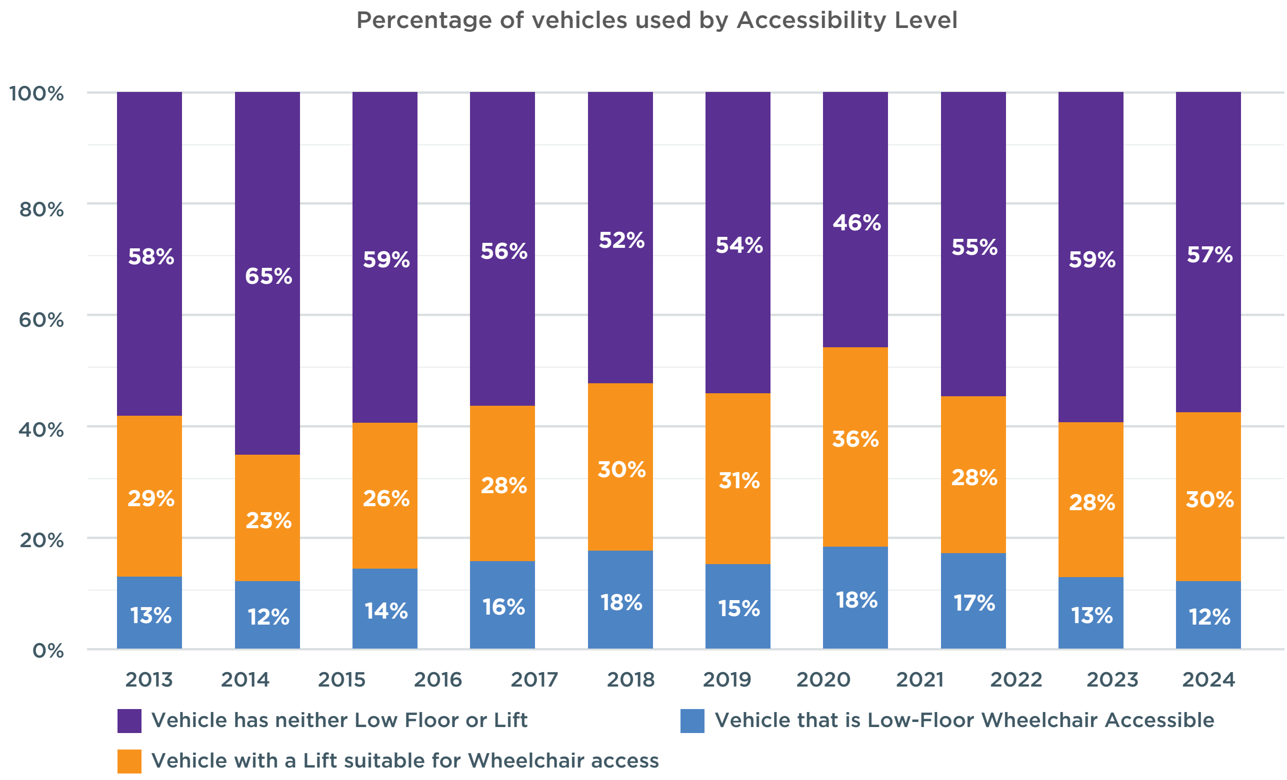


Figure 6.3: Comparison of Accessibility Level by Access Type 2024

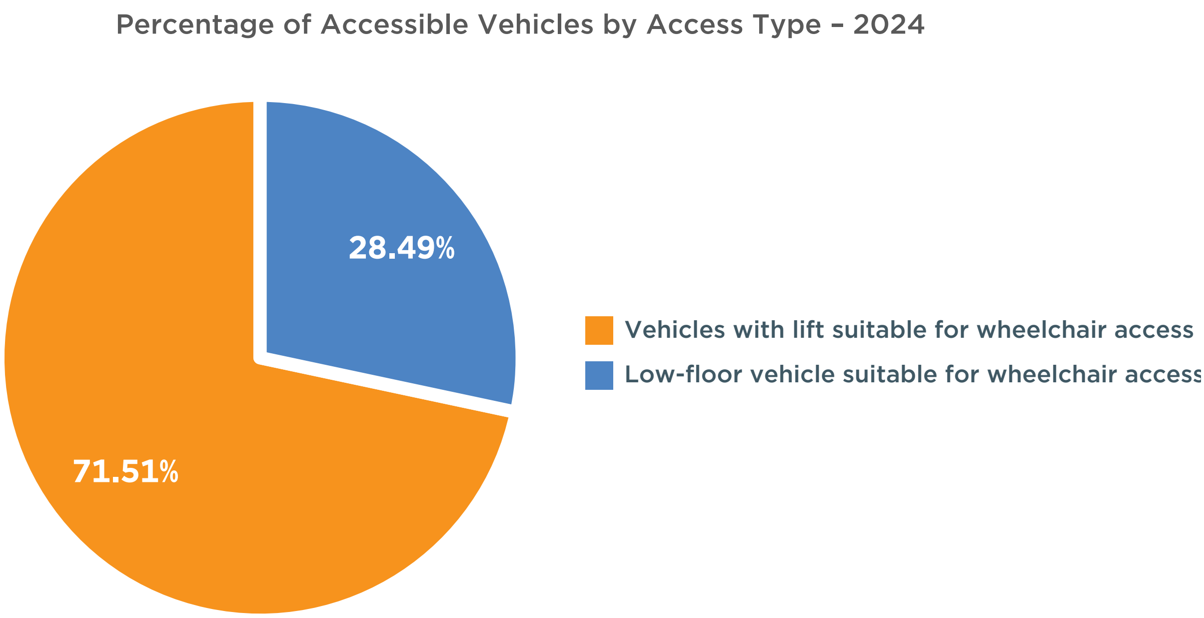
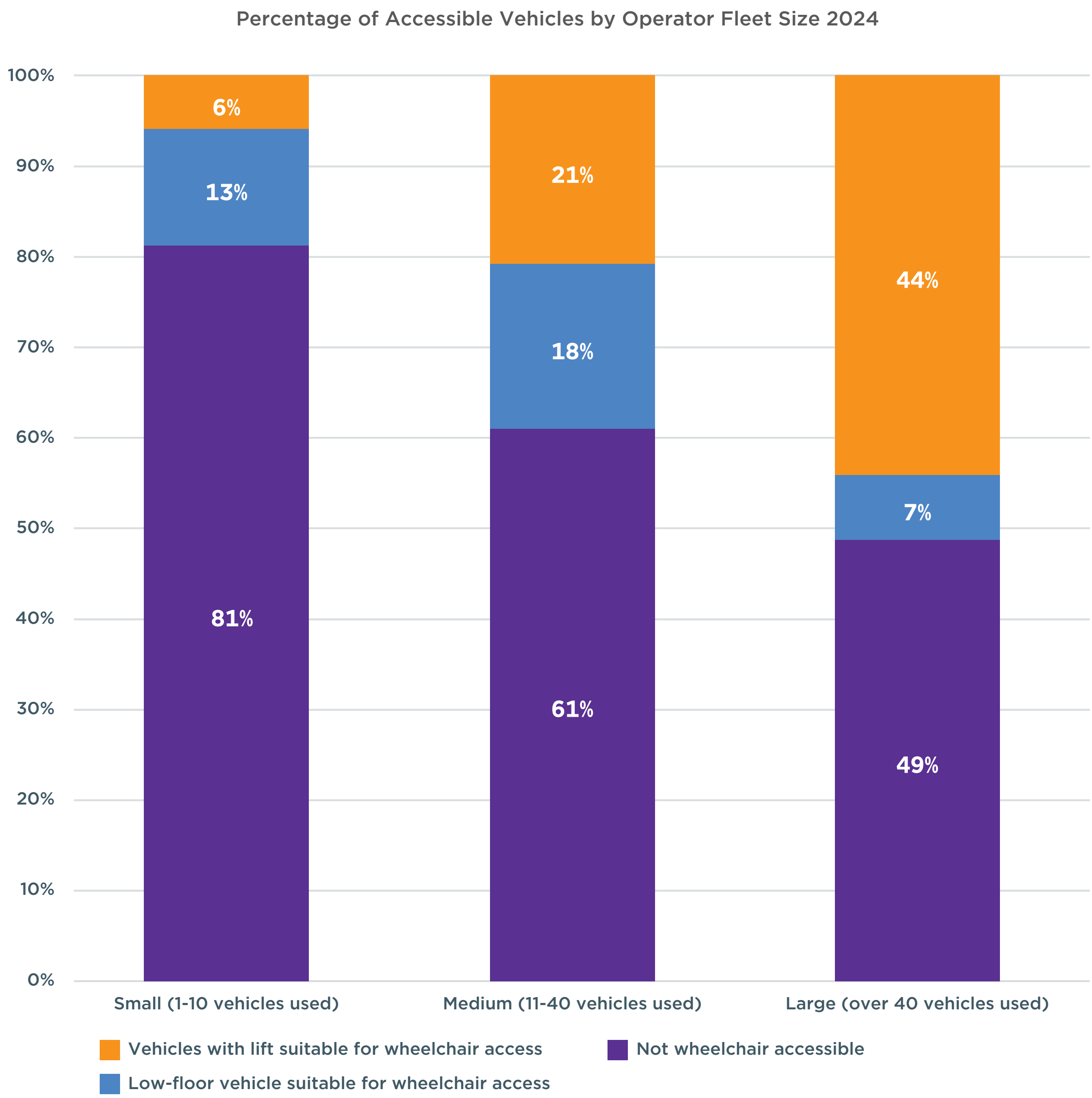


Figure 6.4: Breakdown of Accessibility Level by Operator Fleet Size 2024



7

Emissions

This chapter presents estimates of emissions from commercial bus services through a set of figures and reference tables. The results draw on detailed vehicle-level information reported by operators since 2023 for each licence, including registration year, make and model, engine type, and the proportion of kilometres provided by each vehicle. Using this data, average emissions per kilometre is calculated at route level and summarised by area and by operator size.

Emissions are estimated using the Euro emission standard (Euro I to Euro VI) assigned to each vehicle based on its registration date and the implementation dates of the standards. The official Euro test limits are converted to per-kilometre values using the energy-per-kilometre factors in Reference Table 7B. For each route, those per-kilometre values are combined according to how much each vehicle was used and multiplied by the kilometres operated on that route. Electric vehicles are treated as having zero tailpipe emissions across all pollutants. The Emissions Description table explains the pollutants reported (CO, HC+NOx, NOx, PM, CO_2), while indicative per-kilometre values by Euro Class are shown in Reference Table 7C; the underlying Euro test limits used for conversion are set out in Reference Table 7A.

Figure 7.1 shows the composition of the fleet by Euro Class in 2024. Euro VI vehicles make up the largest share, with older Euro classes forming a small minority and electric vehicles remaining negligible on commercial services. The progression of buses used on commercial services from Euro I to the newer Euro Classes reflects improvements in emissions across the sector. Newer Euro Class types produce lower emissions in particular nitrogen oxides (NOx) and particulate matter (PM), and lower estimated CO_2 per kilometre than earlier class types.

Figure 7.2 presents average CO_2 emissions per kilometre for 2023 and 2024 for the National Level, Greater Dublin Area (GDA) and for Non-GDA services. Between 2023 and 2024 the national average decreased from 1,572 g/km to 1,510 g/km. In the GDA the average decreased from 1,498 g/km to 1,460 g/km, while outside the GDA there was also a decrease from 1,621 g/km to 1,542 g/km. These changes in emissions reflects the mix of vehicles and Euro Class types operating on each route and how intensively they were used across the year.

Figure 7.3 shows the average CO_2 emissions per kilometre by operator size for 2023 and 2024. Small operators (1–10 vehicles used) increased from 1,596.54 g/km to 1,613.21 g/km while medium operators (11–40 vehicles used) experienced a decrease from 1,618.02 g/km to 1,548.03 g/km and large operators (over 40 vehicles used) recorded an increase in average emissions, increasing from 1,470.27 g/km to 1,528.32 g/km. Examining emissions by operator size is influenced by the fleet age and composition, deployment patterns, and the extent to which newer, lower-emission vehicles are concentrated on particular services of the operators fleet.

Emissions Description Table.

Emissions	Description
CO g/KM	Carbon Monoxide
HC + NOx g/KM	Hydrocarbons + Nitrogen Oxides (Mainly Nitrogen Dioxide - NO_2)
NOx g/KM	Nitrogen Oxides (Mainly Nitrogen Dioxide - NO_2)
PM g/KM	Particulate Matter
CO2 g/KM	Carbon Dioxide

Reference Table 7A.[5]

Euro Class	Year of Implementation	Test	CO (g/kWh)	HC (g/kWh)	NOx (g/kWh)	PM (mg/kWh)
Euro I	1992 (< 85 kW)	R-49	4.5	1.1	8	612
	1992 (> 85 kW)		4.5	1.1	8	360
Euro II	01/10/1996		4	1.1	7	250
	01/10/1998		4	1.1	7	150
Euro III	Voluntary EEV (October 1999 to January 2013)	ESC & ELR	1.5	0.25	2	20
	01/10/2000	ESC & ELR	2.1	0.66	5	100
Euro IV	01/10/2005		1.5	0.46	3.5	20
Euro V	01/10/2008		1.5	0.46	2	20
Euro VI	01/01/2013	WHSC	1.5	0.13	0.4	10

Reference Table 7B

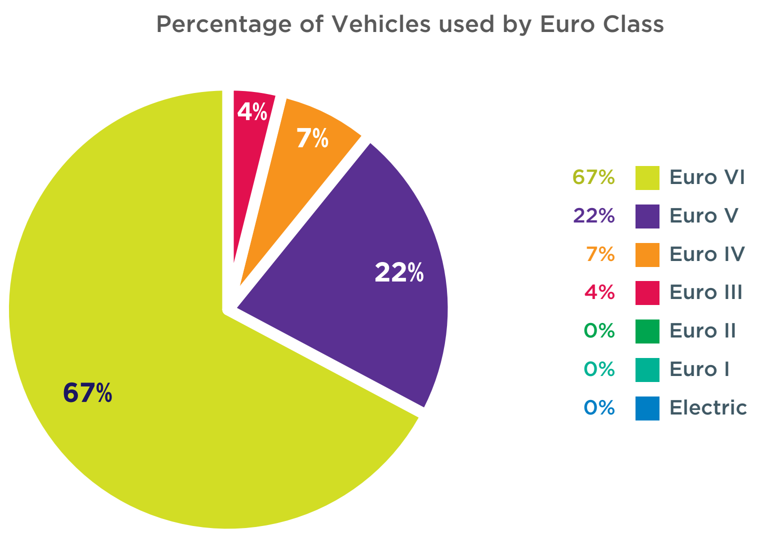
Conversion Table used to Convert g/kWH to g/Km		
MJ to KWH Conversion Factor	MJ/KM Value	KWH/KM Value
0.277777778	14.3	3.972222225

[5] EU: Heavy-duty: Emissions | Transport Policy

Reference Table 7C[6]

Class	Year	CO g/Km	HC g/Km	NOx g/Km	PM g/Km	CO2 g/Km
Euro I	1992	17.88	4.37	31.78	1.43	13,080
Euro II	01/10/1998	15.89	4.37	27.81	0.60	8,720
Euro III	01/10/2000	8.34	2.62	19.86	0.40	2,065
Euro IV	01/10/2005	5.96	1.83	13.90	0.08	1,825
Euro V	01/10/2008	5.96	1.83	7.94	0.08	1,744
Euro VI	01/01/2013	5.96	0.52	1.59	0.04	1,356
Electric	-	0	0	0	0	0

Figure 7.1: 2024 Percentage of Vehicles used by Euro Class



[6]Department of Transport, Tourism and Sport - Report on Diesel-and Alternative-Fuel Bus Trials December 2019. Department of Transport, Tourism and Sport - Report on Diesel-and Alternative-Fuel Bus Trials December 2019. https://assets.gov.ie/69312/eadd09d7dd5a49f698dbb4a77db4c78c.pdf

Figure 7.2: 2023-2024 Average CO2 Emissions Per Route in Grams (g) per Kilometre by Area

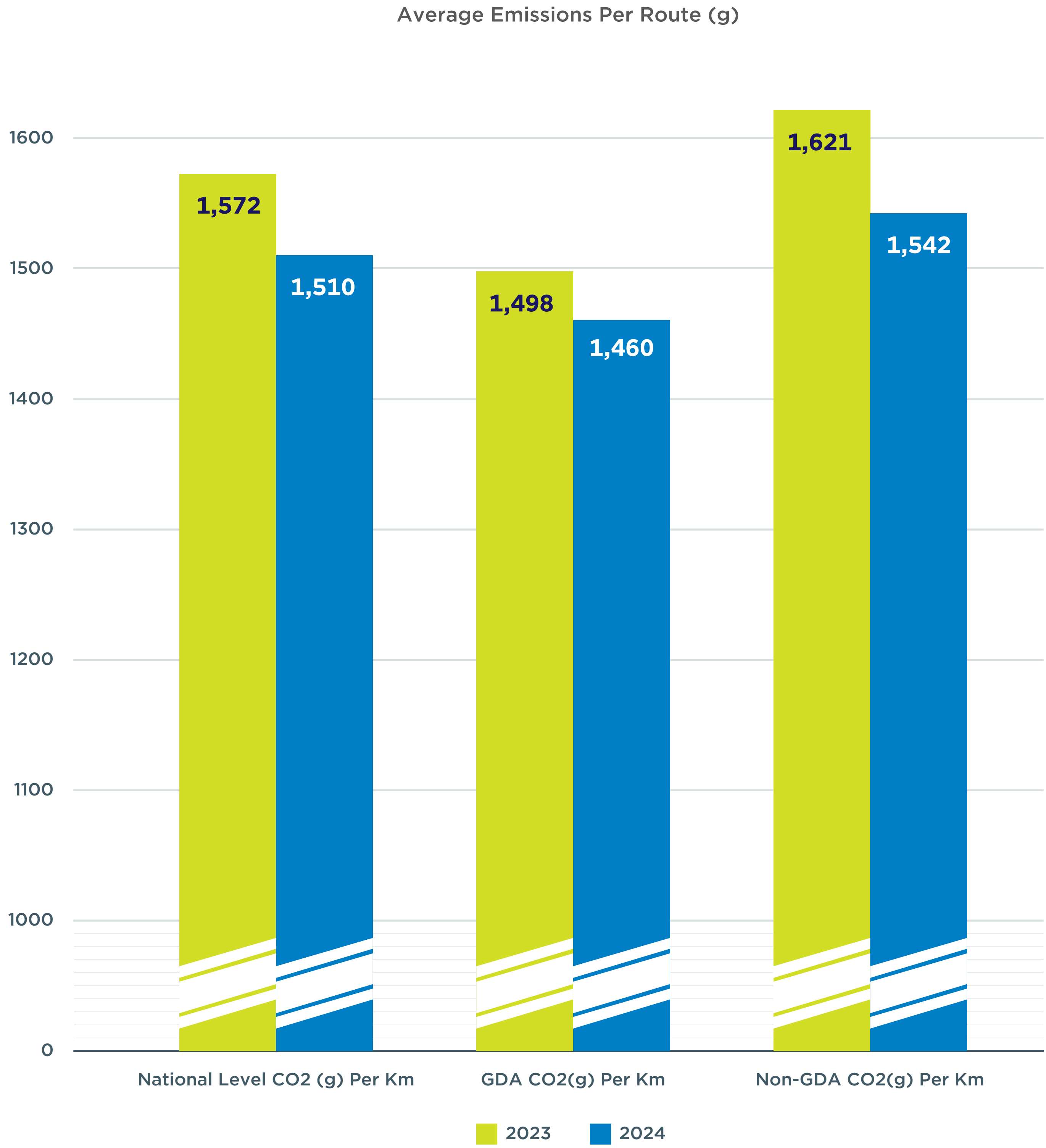
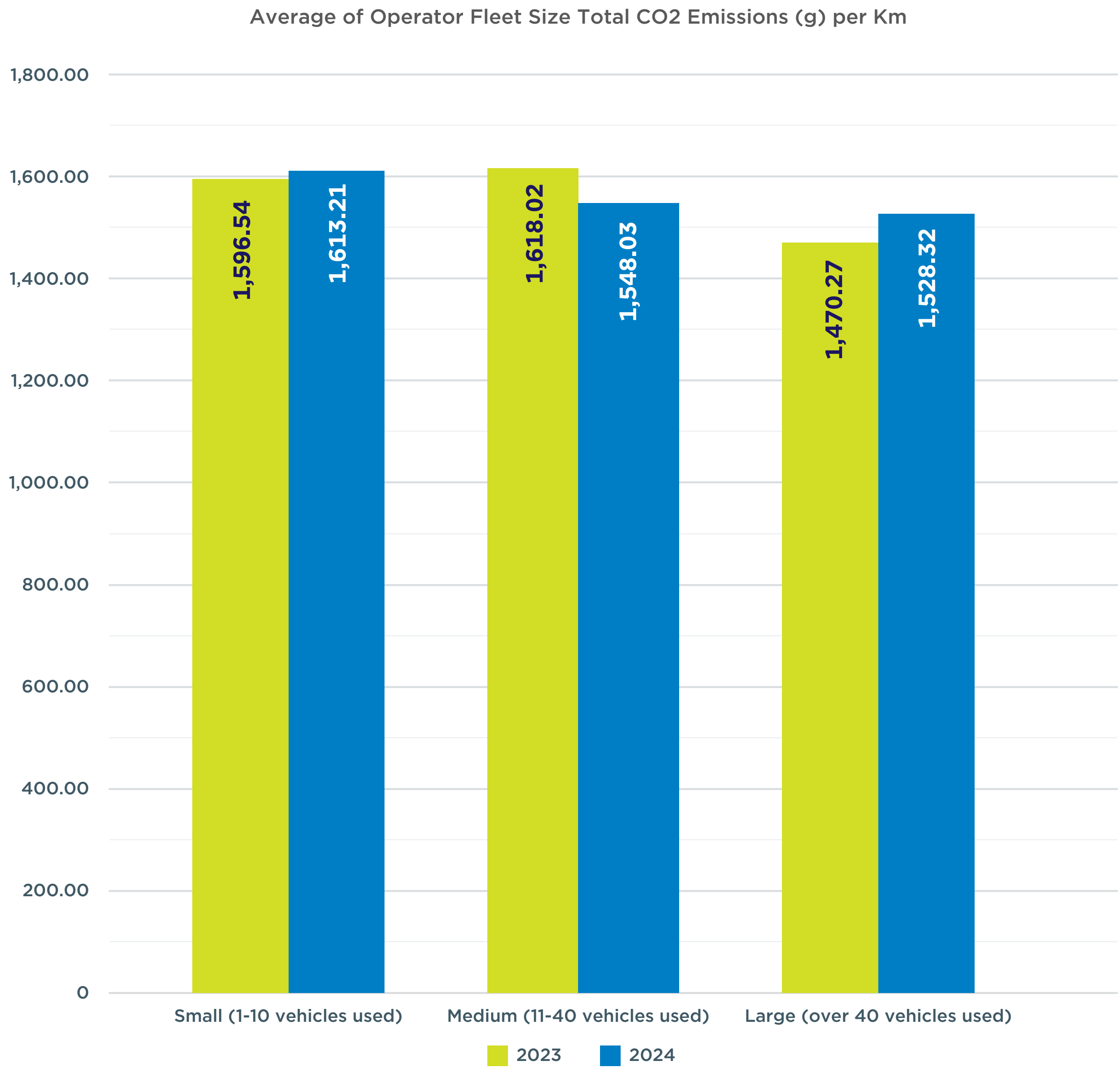


Figure 7.3: 2023-2024 Average Emissions in Grams (g) per Kilometre by Operator Size



Údarás Náisiúnta Iompair
National Transport Authority

For Further Information

Media enquiries
Dermot O'Gara
T: +353 (01) 879 8346

Statistical enquiries
Philip Kavanagh
T: +353 (01) 879 8334

National Transport Authority
Haymarket House,
Smithfield,
Dublin 7,
D07CF98