Údarás Náisiúnta Iompair
National Transport Authority

Statistical Bulletin Number: 04 / 2016
July 2016

Commercial Bus Services in Ireland

(2015 statistics)

Bulletin Topics:

- Number of operators
- Passenger journeys
- Scheduled vehicle kilometres
- Passenger revenue
- Free Travel Scheme revenue and passenger journeys
- Total public transport passenger numbers in Ireland
- Number and age of buses used to provide licensed services
- Operating fleet with Automatic Vehicle Location (AVL) systems on board
- Operating fleet with smartcard reading equipment on board
- Wheelchair accessibility of the licensed services fleet

Introduction

This statistical bulletin is a publication of the National Transport Authority of Ireland ("the Authority"). It focuses on bus statistics for licensed bus passenger services operating to a regular schedule in Ireland.

These licensed services are often called "commercial" bus services because they are operated without any public subsidy from the Authority. Many of the services, however, receive Free Travel payments from the Department of Social Protection in compensation for the revenue foregone from carrying those entitled to Free Travel.

These bus services are individually licensed by the Authority. Under section 73 (Information, data and statistics) of the Dublin Transport Authority Act 2008, amended by section 75 of the Taxi Regulation Act 2013, the Authority is required to *"collect, compile, analyse and prepare information, data or statistics"* regarding public transport services in Ireland.

The bus services covered by this bulletin include any licensed service with an origin, intermediate point, or a destination within Ireland (i.e. essentially any service travelling through any part of the State). Bus services subject to an authorisation that are travelling to, from or through Northern Ireland and then into this State are also included in the bulletin.

The Authority did not include information on Event or Venue specific licences, Temporary services, Demand Responsive services or Specific Targeted services (such as tours, social club events, et cetera) because of the ad hoc and irregular nature of these mainly ancillary services.

The data in this bulletin covers statistical information for all operators providing licensed services across the State for the years 2013 to 2015 and the Greater Dublin Area (the "GDA")[1] for the years 2012 to 2015 for comparative purposes. High level information on Public Service Obligation ("PSO") services, which are subsidised services provided under contract to the Authority, has also been included for comparative purposes.

This will be the third year that data has been provided by all licensed operators running services with an origin, intermediate point, or destination in the State. For operators who have services within the GDA this will be the fourth year that they have supplied data. Following comparison some figures previously provided have been revised by operators. The data expressed in this bulletin utilises the more up to date information and updates the previous years' bulletins.

Please note that the references to services as 'GDA' refers to any service travelling to, from or through any of the GDA counties of Dublin, Meath, Wicklow or Kildare. This includes services that travel wholly within the GDA as well as services that travel outside the GDA counties but which provide even part of the service within the GDA. The services travelling wholly outside of the GDA counties are referred to as 'Non-GDA Services' and, 'Nationally' refers to all services running to, from or through the State, and these are the meanings assigned to them throughout the document unless otherwise stated.

Readers should be aware that the two principal contracted State funded bus operators, Bus Éireann and Dublin Bus, also provide licensed commercial bus services. These include the Bus Éireann Expressway Services and the Dublin Bus Airlink services and so when relevant, their licensed figures are included in the licensed commercial bus services data.

The Authority has produced separate bulletins on State funded services provided by Dublin Bus, Bus Éireann, M&A Coaches, Whartons Travel Ltd, Bernard Kavanagh & Sons Ltd and the Rural Transport Programme, as well as bulletins on State funded rail services provided by Iarnród Éireann and Luas. These can be found on the Authority's website www.nationaltransport.ie under the heading Publications & Statistics.

Statistical Qualification - it is important to note that the figures used in this bulletin are provided by the operators and are intended to illustrate general features for licensed commercial public bus passenger services including patronage, passenger revenues and the characteristics of the fleet and they are not meant to be read as precise calculations. Rounding has being used and this could affect overall percentages. It should also be noted that some figures from previous years have been revised by the operators this year. This has been reflected in the figures stated in this bulletin.

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

Acknowledgement

The 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. **A 100% return** was achieved from all operators with active licences. A 99% return was achieved in 2014 and a 100% in 2013.

1 The Greater Dublin Area comprises the city of Dublin and the county council areas of South Dublin, Fingal, Dún Laoghaire-Rathdown, Kildare, Wicklow and Meath

Licensed Bus Passenger Services Nationally

Licensed bus services passenger journeys

2014	2015	
20.7 million	22.7 million	↑9.5%

All modes of public transport: passenger journeys in millions (including Rail but excluding School Services)

2014	2015	
238.9 million	248.8 million	↑4.2%

2015 versus 2014 Licensed Bus Services

Annual scheduled vehicle kilometres ↑4.9%

Average age of fleet up by 0.3 years to ↑6.9 years

Fare Revenue ↑10%

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1

Number of Operators

It is important to highlight that there is a large variability in the scale and type of services provided by operators. Operators provide diverse services including large scale inter-city and interurban services that 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, villages and rural areas.

There were 126 operators in 2015 actively providing regular public bus passenger services on a national basis. This figure has been consistent with the previous year's totals of 124 in 2013 and 127 in 2014. While the total number of operators has remained fairly static between 2013 and 2015 individual operators have entered and exited the market.

There were 7 new entrants[2] to the regular commercial bus passenger services market in 2015.

The 126 operators held a total of 345 Licences and Authorisations to provide regular public bus passenger services within the State. Of the 345 Licences, 36 were new regular service licences granted in 2015, 35 of which commenced within the year. This represents about 10% of all licences operated in 2015. 20 of these were for services wholly outside the GDA. There were 33 new licences granted in 2014, however only 22 of these commenced in 2014.

57% of the new licences granted in 2015 were for services wholly outside of the GDA whereas this was 78% in 2014. Of the 68 regular service licences granted between 2014 and 2015, over two thirds were for services wholly outside of the GDA. Tables 1A, 1B and 1C give an overview of the breakdown of the market by number of operators and licences held.

It should be noted that a 100% return was achieved from all operators with active licences. The Authority revokes non-active licences.

Table 1A: Number of Operators with Active Regular services

Year	Number of Operators with Active Licences
2013	124
2014	127
2015	126

Table 1B: Number of Active Regular services

Licences/Year	2015	Percent of Total
Total Licences & Authorisations	345	100%
Licences for Non-GDA services	214	62%
Licences serving GDA	131	38%
New Licences Active in 2015	35	10%
New Licences for Non-GDA services	20	6%
New Licences serving GDA	15	4%

2 New entrants in 2015 include instances where licences were transferred from sole traders to limited companies and from existing operators to sub-contractors, as well as operators entering the regular service market who were previously active in the non-regular bus passenger services market, such as the tourist market or private hire market.

Table 1C: Percent of Operators by Licences provided in 2015

Number of Licences:	Nationally	Operating Wholly Outside the GDA	Operating in or through the GDA
Operators with 1 Licence	50%	55%	42%
Operators with up to 2 Licences	70%	73%	65%
Operators with up to 3 Licences	79%	85%	71%
Operators with up to 4 Licences	86%	91%	77%
All Licences	100%	100%	100%

As can be seen from the Table 1C half of all operators in 2015 held only one licence with only 9% of operators providing services wholly outside the GDA holding more than 5 licence as opposed to 23% for operators who provide services operating in or through even part of the GDA.

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 spend, all of which lead to greater travel. Economic decline produces the opposite effect. The commercial bus passenger sector has seen an overall strong passenger growth on a national basis. Growth was evident between 2014-2015 both on the Licensed services in the GDA and those services operating wholly outside the GDA. This growth was not evenly distributed.

Licenses for services in the GDA have seen over a 25% increase in annual passenger journeys since 2012 and just over 20% since 2013. Services wholly outside of the GDA, despite a growth between 2014-2015, are 0.4% below figures in 2013. The share of the commercial passenger journeys for Non-GDA services has fallen from 35% in 2013 to 31% in 2015. Tables 2A to 2B along with Figure 1.1 highlight the growth in respect to licensed passenger numbers between 2013 and 2015. Table 2C indicates how the passenger journeys are shared out.

For a broader view commercial bus services and PSO[3] services are compared in Tables 2D-2E.

The percentage of licensed commercial bus passenger numbers is diluted by the large number of Dublin Bus (PSO) passenger journeys (over 119 million in 2015). PSO figures excluding the Dublin Bus PSO numbers are also contained Tables 2D-2E.

Table 2F provides figures on the market share when all the PSO bus services are included and Table 2G where Dublin Bus PSO services are excluded. Section 7 compares the commercial bus passenger services to all public transport provided in 2015.

Licensed commercial bus passenger journeys represent about 9% of all public transport passenger journeys, 13% of all bus passenger journeys and over 42% of bus passenger journeys when journeys on Dublin Bus PSO services are excluded. As can be seen from Tables 2D-2F this is an increase on previous years.

However, it must also be borne in mind that journey lengths can vary in size depending on the type of service. For instance, a three kilometre urban journey in Dublin city is not the same as a 200km interurban journey between Dublin and Galway, although they are both counted as one passenger journey. It should also be noted that the figures are presented on an aggregated basis and individual operators and routes have seen increases and decreases in passenger journeys over the years.

Table 2A: Annual passenger journeys (in millions)

Service Type/Year	2012	2013	2014	2015
Licensed bus services (GDA)	12.50	13.02	14.01	15.67
Licensed bus services (Non-GDA)	-	7.08	6.74	7.05
Licensed bus services (Nationally)	-	20.10	20.75	22.72

3 PSO services are those services provided on a non-commercial basis under contact to the Authority.

Table 2B: Percent change in Annual commercial passenger journeys by year

Service Type/ % Change by year	2012-2013	2013-2014	2014-2015	2013-2015	2012-2015
Licensed bus services (GDA)	4.2%	7.6%	11.9%	20.4%	25.4%
Licensed bus services (Non-GDA)	-	-4.8%	4.6%	-0.4%	-
Licensed bus services (Nationally)	-	3.1%	9.5%	13.0%	-

Figure 2.1: Commercial Licensed Services Annual Passenger Journeys 2012-2015 (in millions)

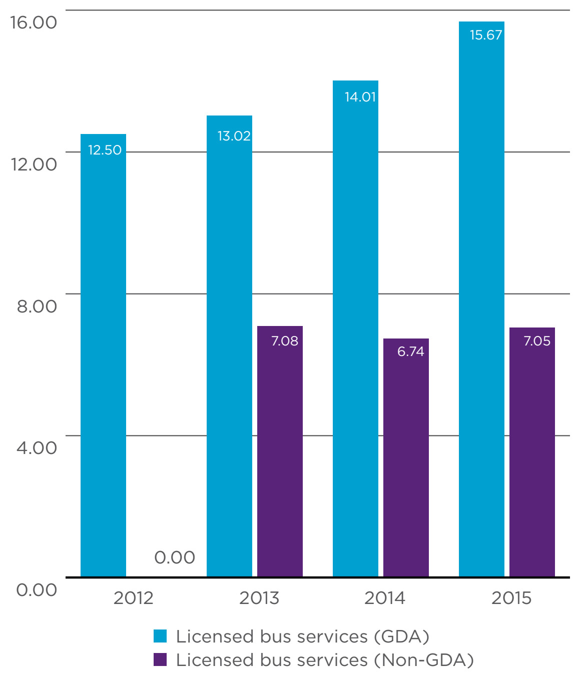


Table 2C: Percent Breakdown in the State of annual passenger journeys 2013 to 2015

Service Type/Year	2013	2014	2015
Licensed bus services (GDA)	65%	68%	69%
Licensed bus services (Non-GDA)	35%	32%	31%
Licensed bus services (Nationally)	100%	100%	100%

Table 2D: Comparison of licensed and PSO bus services in annual passenger journeys

Service Type/ Year	2012	2013	2014	2015
Licensed bus services (GDA)	12.50	13.02	14.01	15.67
Licensed bus services (Non-GDA)	-	7.08	6.74	7.05
PSO Dublin Bus services	113.28	112.49	116.26	119.82
PSO bus services (Excl. Dublin Bus)	30.36	30.38	31.47	32.03
Licensed bus services (Nationally)	-	20.10	20.75	22.72
PSO bus services (Nationally)*	143.64	142.87	147.73	151.85
Total Licensed & PSO bus services	-	162.97	168.48	174.57

**Note: PSO services here refer to Dublin Bus, Bus Éireann, M&A Coaches, Whartons Travel Ltd, Bernard Kavanagh & Sons Ltd and Rural Transport Programme (RTP) services.*

Table 2E: Percent change in all bus services annual passenger journeys by year

Service Type/% Change	% Change 2012-2013	% Change 2013-2014	% Change 2014-2015	% Change 2013-2015	% Change 2012-2015
Licensed bus services (GDA)	4.2%	7.6%	11.9%	20.4%	25.4%
Licensed bus services (Non-GDA)	-	-4.8%	4.6%	-0.4%	-
PSO Dublin Bus services	-0.7%	3.4%	3.1%	6.5%	5.8%
PSO bus services (Excl. Dublin Bus)	0.1%	3.6%	1.8%	5.4%	5.5%
Licensed bus services (Nationally)	-	3.1%	9.5%	13.0%	-
PSO bus services (Nationally)*	-0.5%	3.4%	2.8%	6.3%	5.7%
Total change all bus services		3.4%	3.6%	7.1%	-

**Note: PSO services here refer to Dublin Bus, Bus Éireann, M&A Coaches, Whartons Travel Ltd, Bernard Kavanagh & Sons Ltd and Rural Transport Programme (RTP) services.*

Table 2F: Percent split of licensed and PSO bus services in annual passenger journeys

Service Type/Year	2013	2014	2015
Licensed bus services (nationally)	12.33%	12.32%	13.02%
PSO bus services (nationally)*	87.67%	87.68%	86.98%
Total	100%	100%	100%

**Note: PSO services here refer to Dublin Bus, Bus Éireann, M&A Coaches, Whartons Travel Ltd, Bernard Kavanagh & Sons Ltd and Rural Transport Programme (RTP) services.*

Table 2G: Percent split of licensed and PSO bus services in annual passenger journeys (excluding Dublin Bus PSO services)

Service Type/Year	2013	2014	2015
Licensed bus services (nationally)	39.82%	39.75%	41.53%
PSO bus services (nationally excl. Dublin Bus)	60.18%	60.25%	58.47%
Total	100%	100%	100%

3

Scheduled vehicle kilometres

'Scheduled vehicle kilometres' indicate the number of vehicle kilometres that a bus company planned to operate in a given period, e.g. a year, as per their cumulative timetables.

Tables 3A and 3B along with Figure 3.1 illustrate the summary of licensed scheduled vehicle kilometres between 2012 and 2015. Table 3D shows licensed commercial annual scheduled vehicle kilometres in comparison to the PSO annual operated vehicle kilometres across the State. This excludes Rural Transport kilometres, as many services are demand responsive and vary from day to day. Commercial operators were asked to provide the kilometres they would operate based on their licensed timetables, whereas the PSO services provided figures on the actual kilometres provided by the vehicles. This should be borne in mind when compared the figures below.

As illustrated by Table 3A there has been an overall increase in scheduled vehicle kilometres for licensed services traveling to, from or through the GDA between the years 2012 and 2015. There has also been an increase in the scheduled vehicles kilometres for licensed services travelling wholly outside of the GDA between 2014 and 2015 and an overall increase between 2013 and 2015 despite a decrease between 2013 and 2014. Again as with passenger journeys individual operators and routes have seen increases and decreases between these years.

As can be seen in Table 3E licensed bus scheduled vehicle kilometres represent just over 50% of the total licensed and PSO bus kilometres as against 13% of the passenger journeys. This reflects the fact that a significant proportion of these licensed bus services are operating reasonably long interurban services.

Table 3A: Annual scheduled vehicle kilometres (millions)

Service Type/ Year	2012	2013	2014	2015
Licensed bus services (GDA)	55.10	60.29	62.67	65.47
Licensed bus services (Non-GDA)	-	19.87	19.33	20.48
Licensed Services (National)	-	80.15	82.00	85.95

Note: The GDA refers to any service travelling to, from or through any of the GDA counties, and 'Nationally' refers to all services running to, from or through the State.

Table 3B: Percent breakdown in the State of total vehicle kilometres for 2013 to 2015

Service Type/ Year	2013	2014	2015
Licensed bus services (GDA)	75%	76%	76%
Licensed bus services (Non-GDA)	25%	24%	24%
Licensed Services (National)	100%	100%	100%

Table 3C: Percent change scheduled kilometres by year

Service Type/Year	2012-2013	2013-2014	2014-2015	2013-2015
Licensed bus services (GDA)	9.4%	4.0%	4.5%	8.6%
Licensed bus services (Non-GDA)	-	-2.7%	5.9%	3.1%
Licensed Services (National)	-	2.3%	4.8%	7.2%

Figure 3.1: Annual Vehicle Kilometres 2013-2015 (in millions)

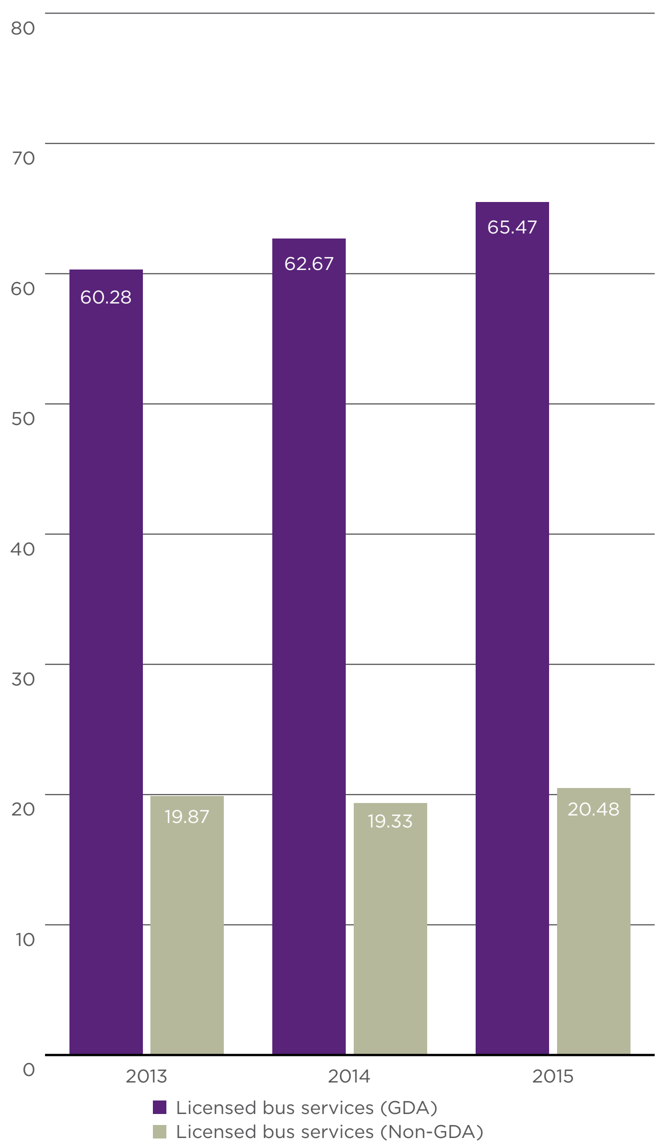


Table 3D: Comparison of licensed and PSO annual vehicle kilometres (millions)

Service Type/ Year	2013	2014	2015	% Change 2013-2015
Licensed bus services (nationally)	80.2	82.0	86.0	7%
PSO bus services (nationally)*	83.64	81.65	88.54	6%
Total	163.8	163.7	174.5	7%

**Note: PSO services here refer to Dublin Bus and Bus Éireann only. Licensed Bus Services kilometres are scheduled vehicles kilometres. PSO services kilometres are operated vehicle kilometres.*

Table 3E: Percentage Split of licensed and PSO annual vehicle kilometres

Service Type/Year	2013	2014	2015
Licensed bus services (nationally)	48.94%	50.11%	49.26%
PSO bus services (nationally)*	51.06%	49.89%	50.74%
Total	100%	100%	100%

**Note: PSO services here refer to Dublin Bus and Bus Éireann only. Licensed Bus Services kilometres are scheduled vehicles kilometres. PSO services kilometres are operated vehicle kilometres.*

4

Passenger revenue

Licensed commercial passenger revenue consists of all revenue from ticket sales (including cash, Leap card, TaxSaver, online & prepaid tickets), as well as commercial sector subsidies. The vast majority of the licensed commercial passenger revenue is from ticket sales alone. **It is important to note that revenues from the Department of Social Protection Free Travel payments and private hire services are not included in the revenue figures in this section of the bulletin.**

The Department of Social Protection Free Travel payments for licensed and PSO national bus services are outlined separately in Section 5 'Free Travel Scheme revenue'.

A commercial sector subsidy in respect of licensed commercial passenger services refers to when, for example, a business park pays a bus operator to run a particular scheduled route that serves a business park area.

As can be seen from Tables 4A and 4B, **licensed bus passenger revenue represents about 36 % of the total passenger fare revenue figure in the State.** This is an increase on the figure of 33.76% for the year 2013 and 35.2% in 2014. The PSO bus services national passenger revenue is made up of passenger fare revenue figures from Dublin Bus, Bus Éireann and the Rural Transport Programme (RTP). It does not include PSO subsidy payments in respect of these services and does not include the Free Travel grant.

Although both passenger journeys and fare revenue increased between 2014 and 2015 the increase in fare revenue from 2014 to 2015 was slightly ahead at just over 10% whereas the increase in passenger journeys was at just under 9.5 %. The operators indicated that while some services had increased fares in that period, there were instances of the cash fare only being increased and online ticket fares remaining the same or seeing slight reductions.

Table 4A: Annual passenger fare revenue (€ millions)

Service Type/Year	2013	2014	2015
Licensed bus services (Nationally)	€114.2	€130.3	€143.4
Percent change on previous year	-	14.1%	10.09%

Note: This does not include Free Travel Pass Revenue from the Department of Social Protection

Table 4B: Comparison of Annual passenger fare revenue (€ millions)

Service Type/Year	2013	2014	2015
Licensed bus services (Nationally)	€114.2	€130.3	€143.4
PSO bus services (Nationally)	€225.0	€239.4	€255.3
Total	€339.2	€369.7	€398.7

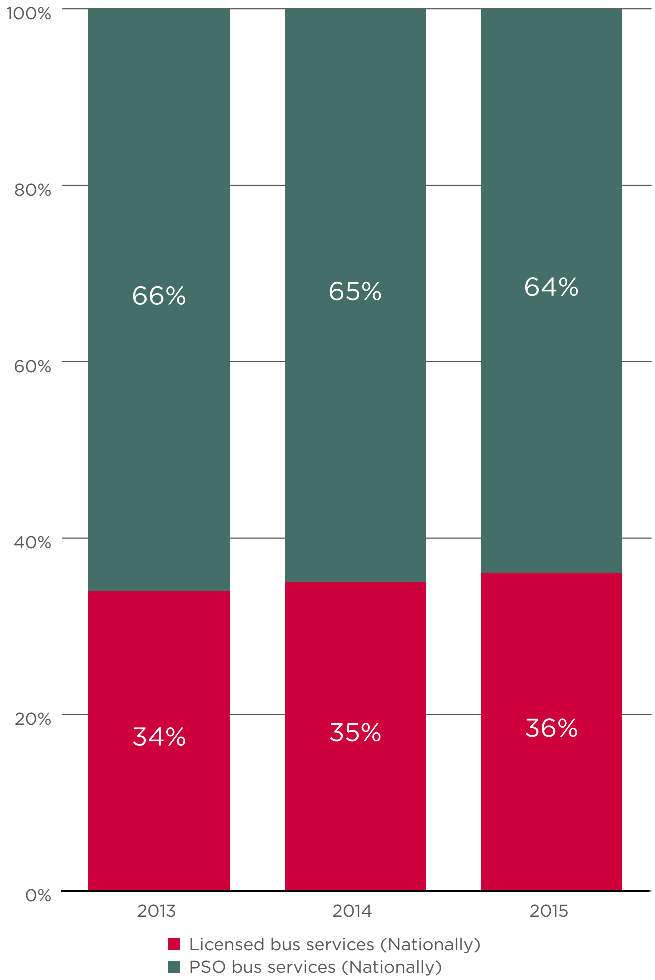
Note: This does not include Free Travel Pass Revenue from the Department of Social Protection

Table 4C: Percent of annual passenger fare revenue

Service Type/ Year	2013	2014	2015
Licensed bus services (Nationally)	33.7%	35.2%	36.0%
PSO bus services (Nationally)	66.3%	64.8%	64.0%
Total	100.0%	100.0%	100.0%

Note: This does not include Free Travel Pass Revenue from the Department of Social Protection

Figure 4.1: Annual Fare Revenue Comparison



5

Free Travel Scheme revenue

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 and Invalidity Pension.

Free travel was available on State funded bus and rail transport including Dublin Bus, Bus Éireann, Iarnród Éireann and Luas services. Free travel is also available on a number of licensed commercial services operated by private bus companies and Bus Éireann.

Table 5A shows annual Department of Social Protection (DSP) payments for the Free Travel Scheme for licensed services and PSO bus services. As Bus Éireann receives a payment in respect of its licensed and PSO services, their payment is split between the licensed bus services and the Bus Éireann PSO services amounts.

Table 5B below shows an increase of payments of 1.5% between 2014-2015. Table 6B details the estimated increase of Free Travel Passengers over the same period as 5.3%.

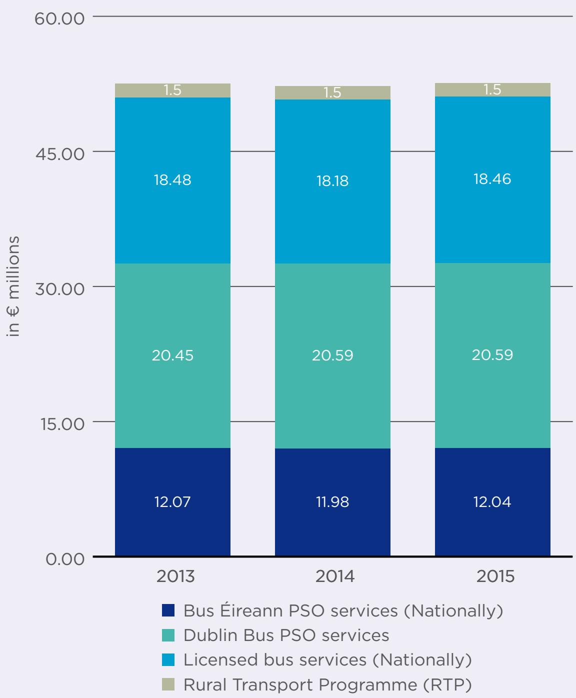
Table 5A: Selected annual DSP Free Travel Scheme passenger revenue

Service Type/Year	2013	2014	2015
Licensed bus services (Nationally)	€18.48m	€18.26m	€18.46m
Dublin Bus PSO services	€20.45m	€20.59m	€20.59m
Bus Éireann PSO services (Nationally)	€12.07m	€11.98m	€12.04m
Rural Transport Programme (RTP)	€1.50m	€1.50m	€1.50m

Table 5B: Percent change in annual DSP Free Travel Scheme passenger revenue

Service Type/Year	2013-2014	2014-2015	2013-2015
Licensed bus services (Nationally)	-1.6%	1.5%	-0.1%
Dublin Bus PSO services	0.7%	0.0%	0.7%
Bus Éireann PSO services (Nationally)	-0.7%	0.5%	-0.2%
Rural Transport Programme (RTP)	0.0%	0.0%	0.0%

Figure 5.1: Free Travel Scheme Revenue 2013-2015 (in millions)



6

Approximate number of licensed annual Free Travel Scheme passenger journeys

The Department of Social Protection's Free Travel Scheme is available on a number of licensed commercial services operated by private bus companies and Bus Éireann.

The Free Travel Scheme (FTS) journeys estimated by the operators increased again in 2015 by 5.33% from a total of 4.7 million out of 20.75 million to 4.95 million out of 22.72 million passenger journeys. This means that **22% of all licensed bus passenger journeys in the State were taken by FTS passengers.** There is also a decrease in the percentage of share of the FTP passengers as the increase is lower for Free travel scheme passenger journeys than the total increase in passenger journeys for 2015.

It should be noted that these figures have been calculated by using an approximate percentage provided by operators and multiplying this by the total passenger journeys on the respective routes. The figures should therefore be taken as indicative only rather than precise calculations.

Table 6B shows that the five largest licensed operators with FTS passengers carried 73% of all FTS passengers. This percentage then increases to 84% for the largest 10 operators.

Tables 6C-6E breaksdown FTP journeys by licensed service type. Table 6D shows the percent of FTP by service type for all FTP passenger journeys, whereas Table 6E shows the FTP passengers by service type as a percentage of all passengers journeys for that service type, GDA, Non-GDA and nationally.

Tables 6D shows that in 2015 60% of all FTP Passenger journeys were on services wholly outside of the GDA and Table 6E shows that this figure represented 42% of all the passenger journeys for services wholly outside the GDA which is above the National percent of 22%.

Table 6A: Number of licensed annual Free Travel Scheme passenger journeys (millions)

Service Type/Year	2013	2014	2015	% Change 2014-2015
Largest* 5 operators with FTS passengers	3.4	3.44	3.46	0.70%
Largest* 10 operators with FTS passengers	3.9	3.96	4.06	2.48%
All licensed operators with FTS passengers	4.75	4.7	4.95	5.33%
All Passenger Journeys Licensed bus services (nationally)	20.1	20.75	22.72	9.49%
FTP Journeys as a % of Total Passenger Journeys	24%	23%	22%	

**Note: Largest here is measured by those operators carrying the largest number of FTS passengers*

Table 6B: % of licensed annual Free Travel Scheme passenger journeys

% of licensed annual Free Travel Scheme passenger journeys	2013	2014	2015
Largest* 5 operators	72%	73%	70%
Largest* 10 operators	82%	84%	82%
All licensed operators	100%	100%	100%

**Note: Largest here is measured by those operators carrying the largest number of FTS passengers*

Table 6C: Number of Free Travel Passengers by Licence Type (in millions)

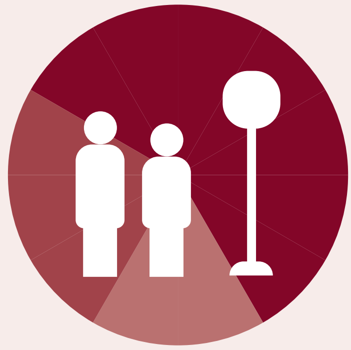
Service Type/Year	2013	2014	2015
Licensed GDA Services	2.22	1.89	1.98
Licensed Non-GDA Services	2.57	2.84	2.97
Licensed Services (National)	4.79	4.73	4.95

Table 6D: Free Travel Passengers as a % of all Free Travel Passengers

Service Type/Year	2013	2014	2015
Licensed GDA Services	46%	40%	40%
Licensed Non-GDA Services	54%	60%	60%
Licensed Services (National)	100%	100%	100%

Table 6E: Free Travel Passenger Journeys as a % of all Passenger Journeys

Service Type/Year	2013	2014	2015
Licensed GDA Services	17%	13%	13%
Licensed Non-GDA Services	36%	42%	42%
Licensed Services (National)	24%	23%	22%



7

Total public transport passenger numbers in Ireland

One of the benefits of conducting this research into licensed commercial public bus services is that it assists in compiling total public transport passenger journeys for Ireland.

The figures do not include any passenger journeys from privately-provided school transport services or passenger journeys on the Department of Education school transport schemes as this information is not available for 2015.

Figure 7.1 and Tables 7A and 7B provide national passenger journey information. Just under 249 million public transport passenger journeys were made in Ireland in 2015, an increase of about 4.2% on 2014 figures. This is an overall increase of approximately 18.57 million journeys or over 8% from 2013.

Figure 7.2 shows that passenger journeys on commercial services have grown from 8.7% of all passengers in 2013 to 9.1% in 2015.

Figures 7.1 to 7.4 compare the commercial service passenger journeys to the other modes of transport.

Figure 7.1: Public Transport Passenger Journeys 2013-2015 compared by service type (excluding school transport)

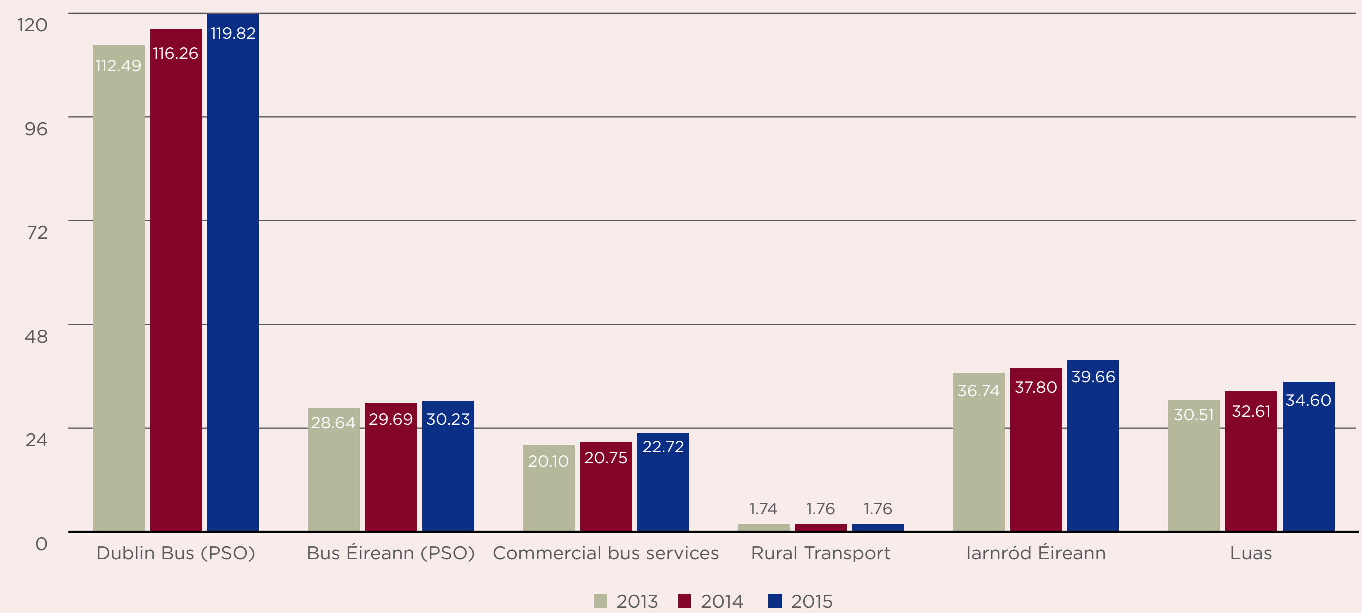


Table 7A: Total passenger journeys (millions) excluding Department of Education & Skills school transport schemes

Service Type/Year	2013	2014	2015	2014-2015 Passenger Increase	2013-2015 Passenger Increase
Dublin Bus (PSO)	112.49	116.26	119.82	3.56	7.33
Bus Éireann (PSO)i	28.64	29.69	30.23	0.54	1.59
Licensed commercial bus services (incl. Dublin Bus & Bus Éireann)	20.1	20.75	22.72	1.97	2.62
Rural Transport Programme	1.74	1.76	1.76	0.00	0.02
Iarnród Éireann	36.74	37.8	39.66	1.86	2.92
Luas	30.51	32.61	34.6	1.99	4.09
Total	230.22	238.87	248.79	9.92	18.57

Note: See references for respective data sources.

Table 7B: Total passenger journeys (percent of total) excluding Department of Education & Skills school transport schemes

Service Type/Year	2013	2014	2015	2014-2015 % Passenger Journeys Increase	2013-2015 % Passenger Journeys Increase
Dublin Bus (PSO)	48.9%	48.7%	48.2%	3.1%	6.5%
Bus Éireann (PSO)	12.4%	12.4%	12.2%	1.8%	5.6%
Licensed commercial bus services (incl. Dublin Bus & Bus Éireann)	8.7%	8.7%	9.1%	9.5%	13.0%
Rural Transport Programme	0.8%	0.7%	0.7%	0.0%	1.1%
Iarnród Éireann	16.0%	15.8%	15.9%	4.9%	7.9%
Luas	13.3%	13.7%	13.9%	6.1%	13.4%
Total	100%	100%	100%	4.2%	8.1%

Note: See references for respective data sources.

Figure 7.2: Passenger Journeys all modes (excluding school transport schemes)

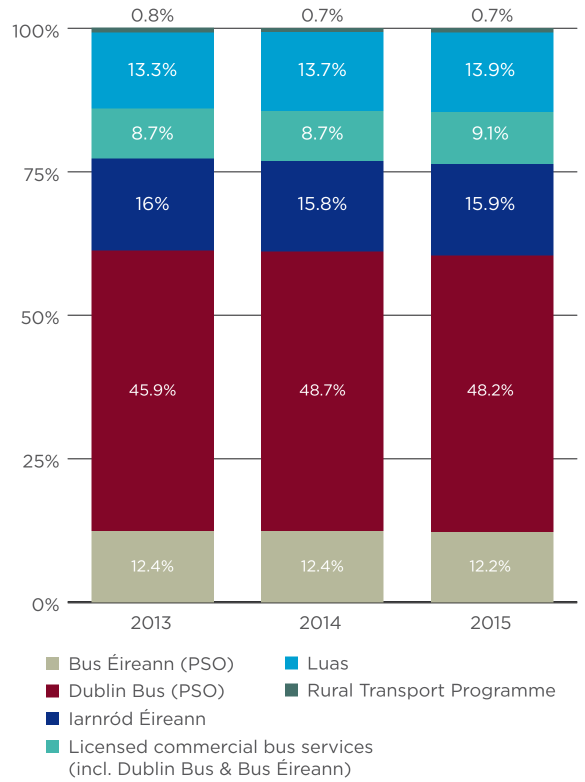


Figure 7.3: Passenger Journeys Excluding Dublin Bus PSO and school transport Schemes

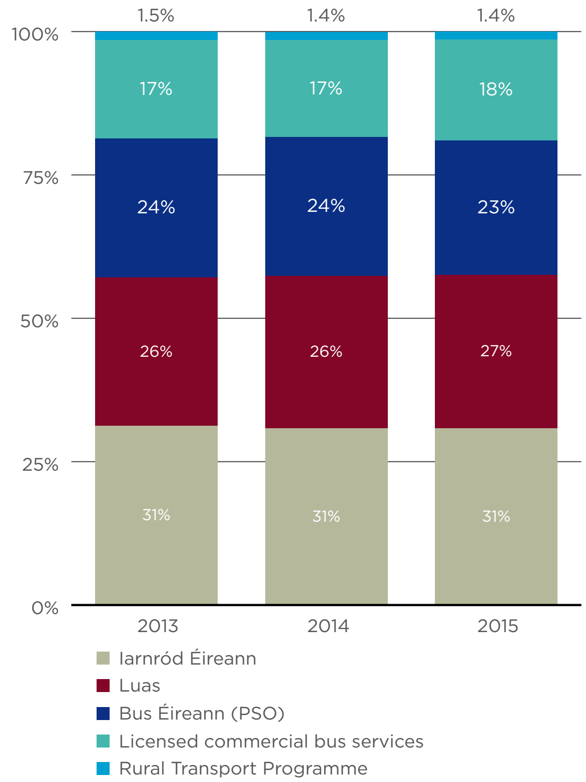
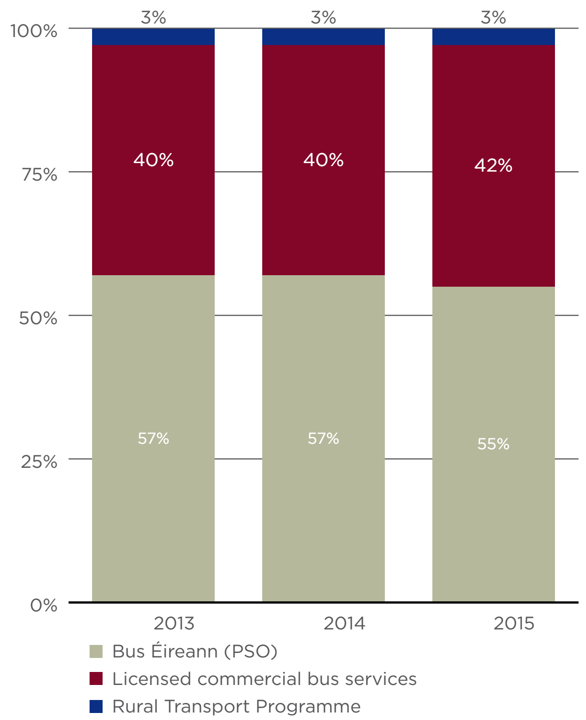


Figure 7.4: Passengers services on bus services (excluding Dublin Bus PSO)



8

Numbers of buses used to provide licensed services

The number of buses that are used to provide licensed bus services in the State is 1,301 as outlined in Table 8A. The Authority also asked licensed operators whether their buses were also used for other activities as well, to show not only how many buses operators used to provide their licensed services but also how much these buses were used solely for running their licensed services.

For example, if an operator had just one bus and this bus was used 70% of the time for regular licenced services and 30% of the time for private hire services, then the operator would just count that as 0.7 of a vehicle when reporting their exact number of buses used. Using this method of calculation, there were 1,301 buses used for providing licensed services of which 1,072 buses (82%) were solely used for providing licensed services.

It must be noted that the format for collecting data on fleet size and age changed between 2013 and 2014 and some discrepancies may have occurred. As with all information contained in the bulletin repeating this process annually, operators will be able to refine their reporting methods which should strengthen the validation and quality of the data.

Table 8A: Numbers of buses used to provide services

Year	2015	Percent of Vehicles used on a Full time basis	Percent of All Buses used
Number of buses used to provide regular services irrespective of whether partially or fully allocated to the licensed services	1,301	-	100%
Number of buses operated solely to provide regular licensed services	1,072	100%	82%
Average vehicle age	6.9 years	-	-
Number of buses with Automatic Vehicle Location (AVL) systems on board	885	83%	68%
Number of buses with smartcard reading equipment (SRE) on board (Excl. Bus Éireann)	336	31%	29%
Number of buses that have lifts suitable for wheelchair access	340	32%	26%
Number of buses that are low-floor wheelchair accessible (LFWA)	176	16%	13%

The licensed buses referred to in the tables include a broad variety of vehicles, such as inter-city coaches, low-floor urban double and single decker buses, as well as midi and mini buses. These buses have a range of different vehicle designs and numbers of seats and the buses are generally used to suit the type of route being served.

The PSO bus details referred to in Tables 8B, 8C and Figure 8.1 relate to Dublin Bus, Bus Éireann, M&A Coaches Ltd, Whartons Travel Ltd and Bernard Kavanagh & Sons Ltd and show their bus numbers that applied at the end of quarter 4 of 2015. Rural transport services are excluded because, in general, the buses used are mini buses which also perform other types of services such as school transport and community group journeys.

Table 8B: Numbers of buses used to provide licensed and PSO services

	2013	2014	2015
Licensed bus services (Nationally)	1,062	1,227	1,301
PSO bus services (Nationally)	1,362	1,376	1,422
Total numbers of buses providing services	2,424	2,603	2,723

Table 8C: Percentage of total number of buses used to provide services

Percentage Split	2013	2014	2015
Licensed bus services (Nationally)	44%	47%	48%
PSO bus services (Nationally)	56%	53%	52%
Total numbers of buses providing services l	100%	100%	100%

Figure 8.1: Number of vehicles providing Licensed and PSO services nationally 2013 to 2015

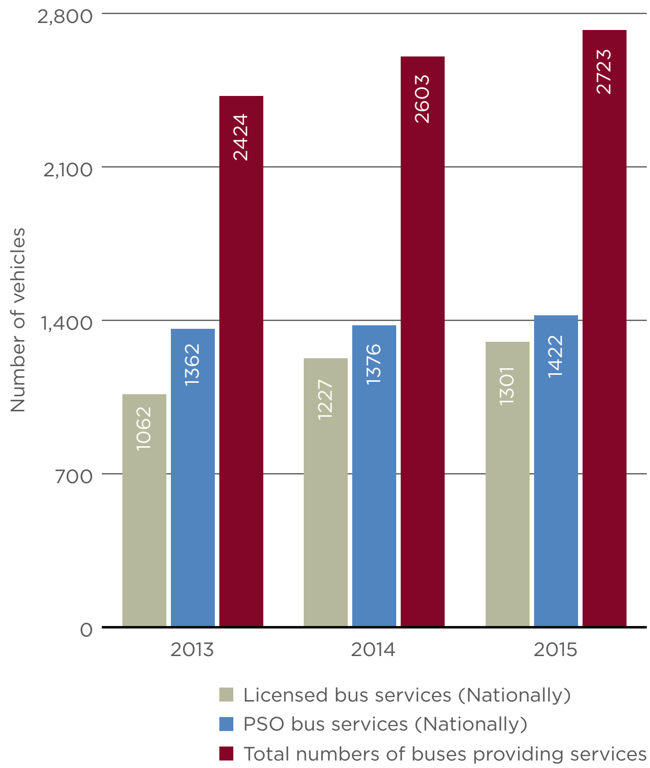


Table 8D: Number of buses used to provide commercial services by operator's fleet size

Total Vehicles used	2013	2014	2015
Largest* 5 operators	525	559	599
Largest* 10 operators	657	727	748
Operators with only one vehicle	32	24	27
All licensed operators number of buses	1,062	1,227	1,301

**Note: Largest here is measured by operator's fleet size.*

Table 8E: Percentage Split of buses used to provide commercial services by operator's fleet size

	Percentage of Total Fleet		
Percentage Split of all Vehicles used to provide Regular Services	2013	2014	2015
Largest* 5 operators	49%	46%	46%
Largest* 10 operators	62%	59%	57%
Operators with only one vehicle	3%	2%	2%

Table 8F: Percent of total fleet by operator's fleet size

	2013	2014	2015
Operators using 1 bus only	26%	19%	21%
Operators using 2 buses only	21%	23%	21%
Operators using 3 buses only	12%	9%	10%
Operators using 3 or less buses	59%	49%	53%
Operators using 10 or more buses	19%	19%	21%

9

Average age of the licensed bus fleet

The average age of a bus fleet is an important measure as the age of a bus can influence: accessibility standards, vehicle emission levels, fuel efficiency, vehicle safety features, bus maintenance requirements, reliability, and maintaining and attracting passengers, who can have a preference for travelling on newer buses with enhanced features and designs.

As mentioned in section 8, there are 1,301 buses used to provide licensed bus services in the State and the average age of the licensed bus fleet in 2015 is 6.9 years. The figure in 2014 was 1,227 vehicles with an average age of a vehicle being 6.6 years. The vehicle age profile shows a slight increase in the average age of the fleet since last year but the increase in numbers shows some investment in the fleet. Table 9A shows that the ten operators with the youngest and oldest bus fleet have both seen the average age of the fleet decrease since 2013. The ten operators with the oldest bus fleet have an average bus fleet age of 16.8 years, and the average vehicle age for all licensed operators is 6.9 years. The average fleet age for the commercial operators has increased slightly from the 2013 levels indicating some investment in this area.

Figure 9.1: Average Vehicle Age

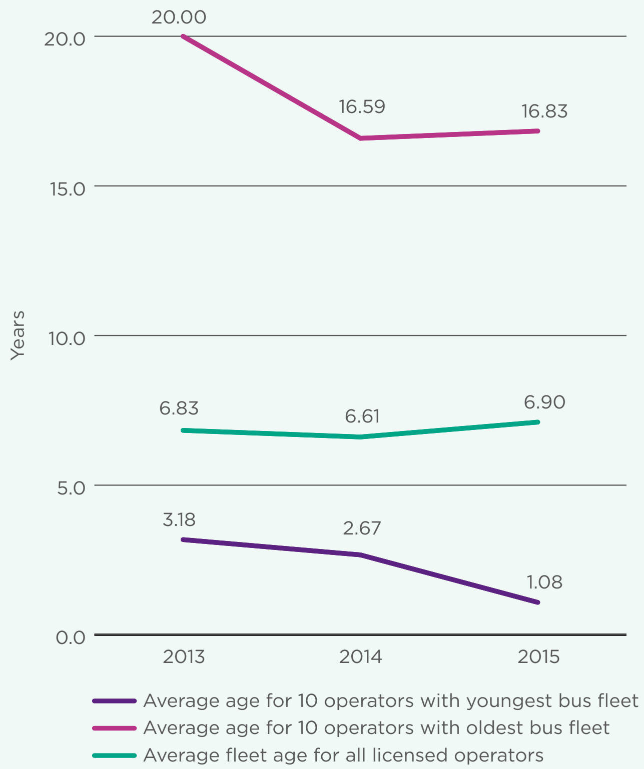


Table 9A: Average age in years of the licensed bus fleet

Average Age of Fleet	2013	2014	2015
Description	in Years		
Average age for 10 operators with youngest bus fleet	3.2	2.7	1.1
Average age for 10 operators with oldest bus fleet	20	16.59	16.8
Average fleet age for all licensed operators	6.83	6.61	6.9

Note: Youngest/oldest here means buses with the lowest/highest cumulative age

Table 9B: Average age of the licensed and PSO bus fleets

	2013	2014	2015
Licensed bus services (Nationally)	6.8 years	6.6 years	6.9 years
Dublin Bus PSO services (Q4)	7.5 years	7.6 years	7.5 years
Bus Éireann City PSO fleet	5.4 years	6.4 years	6.3 years
Bus Éireann non-city fleet*	6.1 years	7.4 years	6.7 years

Note: Bus Éireann's non-city fleet includes Stage Carriage and Dublin Commuter PSO services.*

10

Operating fleet with Automatic Vehicle Location (AVL) systems on board

Automatic Vehicle Location (AVL) is the term used for automatically determining the geographic location of a vehicle or number of vehicles. Vehicles are generally tracked by placing a Global Positioning System (GPS) electronic device in or on a vehicle. There are a number of benefits to AVL, especially in a public transport context, including that it allows an operator to manage fleet better, know where the vehicle(s) are at any given point and it facilitates the provision of real time bus or rail passenger information.

It should be noted that although many AVL systems may be of benefit to an individual operator, only specific AVL systems are compatible to the State's real time passenger information (RTPI) facility that is available through on-street displays and through the website, apps or SMS service. Therefore having buses with AVL on board would not be a sufficient guide as to whether these services could participate in the RTPI facility.

As mentioned in section 3, there are 1,301 buses used to provide licensed bus services in the State. Of these 1,301 buses, 885 have AVL systems on board, which means that **68% of the total licensed national bus fleet has AVL systems on board**. This represents an overall increase of 2% on the total percentage of vehicles with AVL from 2014.

Table 10B and 10C show that the five largest licensed operators (out of the total of 126 active operators), have 599 buses or 68% of all buses with AVL systems on board. This percentage then increases to 81% for the largest 10 operators. These figures indicate that there is a concentration of buses with AVL systems on board among a small group of operators though this appears to have lessened since 2013.

Table 10: A Number of operating fleet with AVL systems on board

	2013	2014	2015
All licensed operators vehicles with AVL	639	812	885
All vehicles used to provide regular services	1062	1227	1301
AVL vehicles as a Percent of Total vehicles used	60%	66%	68%

Table 10B: Number of buses with AVL systems on board by larger operators

	2013	2014	2015
Largest* 5 operators with AVL	482	553	599
Largest* 10 operators with AVL	562	671	718
All licensed operators vehicles with AVL	639	812	885

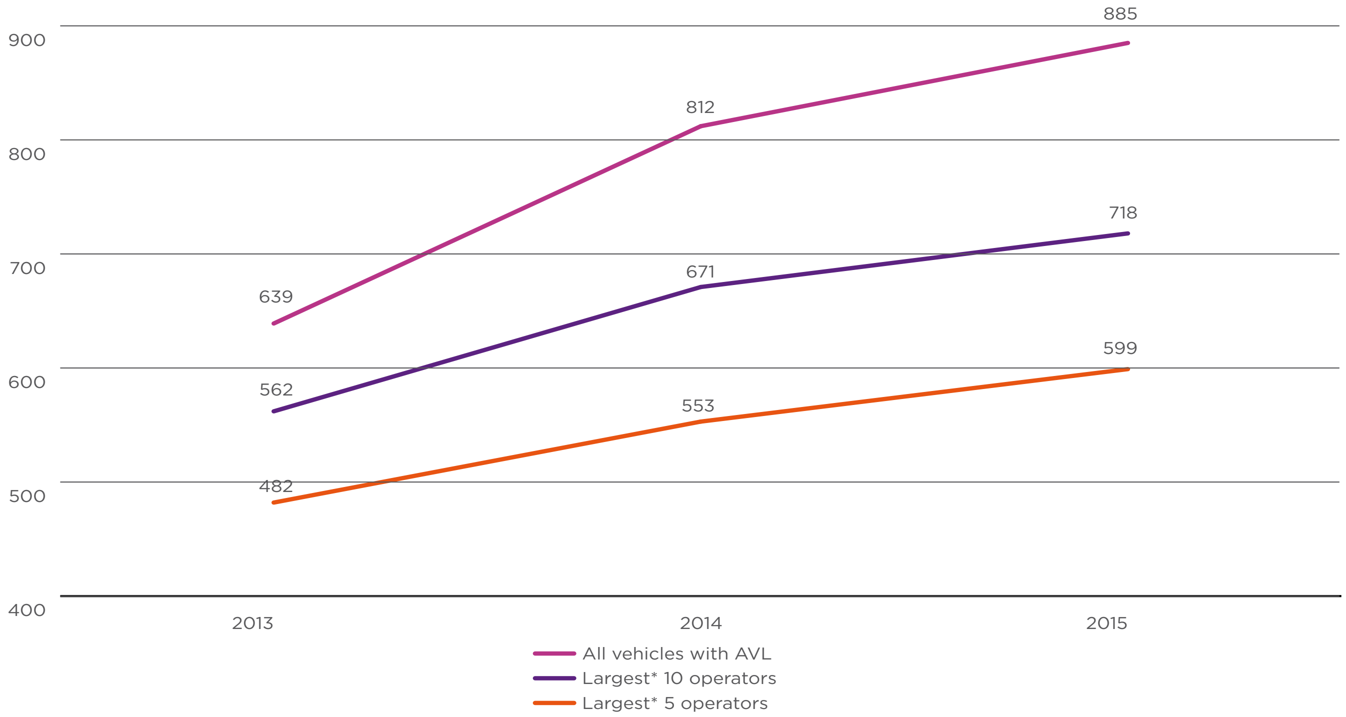
**Note: Largest here is measured by those operators with the biggest AVL fleet size.*

Table 10C: Percentage of all AVL buses controlled by larger operators

	2013	2014	2015
Largest* 5 operators	75%	68%	68%
Largest* 10 operators	88%	83%	81%
All licensed operators	100%	100%	100%

**Note: Largest here is measured by those operators with the biggest AVL fleet size.*

Figure 10.1: Vehicles with AVL



**Note: Largest here is measured by those operators with the biggest AVL fleet size.*

11

Operating fleet with smartcard reading equipment

Public transport smartcards are the technological successor to the older magnetic tickets. Smartcards are generally the size of a credit card and contain a microchip that stores and transmits data. This enables them to communicate with a smartcard reading device without actually touching it, once the card is held close to the device.

The Leap card is the only inter-operable public transport smartcard that has been deployed in the GDA. It was extended to the Greater Cork Area and Galway city in 2014 and further extended to include Limerick and Waterford in 2015.

The Leap card is also available on a number of different routes that begin outside the GDA and then travel through or finish inside the GDA. Examples of these include a variety of Bus Éireann services in the eastern part of the country and Wexford Bus on the Wexford to Dublin City and Airport route.

The Leap card is available for both publicly subsidised and licensed services and in 2015 there were thirteen bus operators using the Leap card: Ashbourne Connect, Bus Éireann, Dublin Bus, Citylink, Express Bus, Matthews Coaches, St Kevin's Bus, Swords Express, Wexford Bus, Collins Coaches, M&A Coaches, Bernard Kavanagh & Sons Ltd and City Direct Galway (Bus Éireann and Dublin Bus run both commercial and publicly subsidised services).

There is also a smartcard available with Ulsterbus called *Smartlink* and as they operate a number of cross-border services, their buses are included in the total figure for operating fleet with smartcard reading equipment on board.

As can be seen in Table 11, **32% of the total licensed national bus fleet has smartcard reading equipment on board.** This refers to buses operating to, from or through the State. This compares with a percentage of 86% for Bus Éireann's PSO fleet in 2015 and with 100% for Dublin Bus' PSO fleet in 2015.

In respect to the Leap card and excluding Bus Éireann there are currently 128 buses for licensed services that are operating in the State with fixed Leap card readers on-board. Some operators also have mobile devices. As the Leap card programme continues to be rolled out in the regional cities and beyond, this number will naturally increase.

Table 11: Operating Fleet with smartcard reading equipment on board

Year	Commercial Licensed (Excl. Bus Éireann)	BÉ PSO	Dublin Bus PSO
2013	27%	67%	100%
2014	25%	75%	100%
2015	32%	86%	100%

Note: The Operating Fleet for commercially licensed services includes all buses used to provide regular services irrespective of whether partially or fully allocated to the licensed services

12

Wheelchair accessibility of the licensed services fleet

In subsections A, B, and C below, the wheelchair accessibility of the licensed fleet is examined. It is important to highlight that subsections A and B indicate whether a vehicle is either low-floor wheelchair accessible or is wheelchair accessible through the use of a lift. There are a small number of vehicles within the licensed bus services fleet that are accessible to wheelchairs by being both low-floor and having the use of a lift, although this is less common.

A. Operating fleet that are low floor buses suitable for wheelchair access

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

Optionally, the bus 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 buses can also require that appropriate bus stop infrastructure, for instance kerbs of a specific height, are in place.

As mentioned in section 8, there are 1,301 buses used to provide licensed bus services in the State. Of these 1,301 buses, 176 are low-floor wheelchair accessible buses, which mean that **13% of the total licensed national bus fleet are low-floor wheelchair accessible**.

Tables 12A and 12B show that the five largest licensed operators have 129 buses or 74% of all buses that are low-floor wheelchair accessible buses. This percentage then increases to 85% for the largest 10 operators. These figures indicate that there is a concentration of buses that are low-floor wheelchair accessible among a small group of operators and that the concentration has increased.

Table 12A: Number of buses that are low-floor wheelchair accessible (LFWA)

Operators/Year	2013	2014	2015
Largest* 5 operators with such buses	95	102	129
Largest* 10 operators with such buses	115	122	150
All licensed operators with such buses	137	148	176

** Note: Largest here is measured by those operators with the biggest LFWA fleet size.*

Table 12B: Percentage of all LFWA buses controlled by larger operators

	2013	2014	2015
Largest* 5 operators with such buses	69%	69%	74%
Largest* 10 operators with such buses	84%	82%	85%

**Note: Largest here is measured by those operators with the biggest LFWA fleet size.*

Figure 12.1: Low Floor Vehicles by Operator Fleet Size 2013-2015

**Note: Largest here is measured by those operators with the biggest LFWA fleet size*

B. Operating fleet that have lifts suitable for wheelchair access

Buses with wheelchair lifts raise the individual and wheelchair above the steps of the bus and into the coach corridor area. This feature requires a deep space at the footpath which is not always available. The use of wheelchair lifts increases the dwell time at bus stops and may not be as preferable for the passenger as the low-floor, roll-on, roll-off option.

Buses with wheelchair lifts are often only able to carry one passenger using a wheelchair at any given time because 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 because seating may need to be removed to provide for a designated wheelchair space.

340 buses or 26% of the total licensed national bus fleet have lifts suitable for wheelchair access.

Tables 12C and 12D show that the five largest licensed operators have 315 buses or 93% of all buses that have lifts suitable for wheelchair access. This percentage then increases to 97% for the largest 10 operators. As with the figures for the low floor vehicles these figures indicate that there is a concentration of buses that have lifts suitable for wheelchair access among a small group of operators and that the concentration increased between 2014 and 2015.

Table 12C: Number of buses that have lifts suitable for wheelchair access

	2014	2015
Largest* 5 operators with such buses	268	315
Largest* 10 operators with such buses	275	329
All licensed operators with such buses	292	340

** Note: Largest here is measured by those operators with the biggest fleet size of buses that have lifts suitable for wheelchair access*

Table 12D: Percentages of buses that have lifts suitable for wheelchair access controlled by larger operators

	2014	2015
Largest* 5 operators with such buses	90%	93%
Largest* 10 operators with such buses	94%	97%
All licensed operators with such buses	100%	100%

** Note: Largest here is measured by those operators with the biggest fleet size of buses that have lifts suitable for wheelchair access*

C. Scheduled kilometres operated with wheelchair accessible vehicles

The data in this section shows what percentage of an operator's total scheduled kilometres were operated with accessible buses, i.e. any vehicles that were either low floor wheelchair accessible or buses with lifts suitable for wheelchair access.

So for instance, if an operator had three buses and one was wheelchair accessible (being either low floor or having a wheelchair lift) then you would expect that 33% of the total scheduled kilometres would be operated with accessible buses. However, if the wheelchair accessible bus was regularly used for licensed services, whereas the other buses were used less often or used as spares, then you would expect the percentage to be much higher because most of their services would be provided with the wheelchair accessible bus.

As mentioned in section 3, the figure for annual scheduled vehicle kilometres used to provide licensed bus services is 85.95 million for the State. Of these 42.04 million are scheduled kilometres operated with wheelchair accessible vehicles, which means that **49% of all the licensed scheduled vehicle kilometres run are operated with wheelchair accessible vehicles.** This is an increase on the 2014 figure of 44%.

As these figures are derived from an estimation by operators, they are intended to be read as guide figures as opposed to being exact calculations.

Tables 12E and 12F show that the five largest licensed operators run 91% of total scheduled kilometres being operated with wheelchair accessible vehicles. 'Largest' here is measured by those operators running the most scheduled kilometres operated with wheelchair accessible vehicles. The 10 largest licensed operators run 97% of total scheduled kilometres operated with wheelchair accessible vehicles.

The details in Tables 12E and 12F and Figure 12.1 indicate that there is a concentration of scheduled kilometres run with wheelchair accessible vehicles among a small group of operators.

Table 12E: Number of scheduled vehicle kilometres run with wheelchair accessible vehicles (millions)

	2014	2015
Largest* 5 operators by accessible kms run (millions)	31.4	38.3
Largest* 10 operators by accessible kms run (millions)	34.0	40.5
All licensed operators by accessible kms run (millions)	35.8	42.0

** Note: Largest here is measured by those operators running the most scheduled kilometres operated with wheelchair accessible vehicles*

Table 12F: Percentage of scheduled vehicle kilometres run with wheelchair accessible vehicles (millions)

	2014	2015
Largest* 5 operators by accessible kms run (millions)	88%	91%
Largest* 10 operators by accessible kms run (millions)	95%	96%
All licensed operators by accessible kms run (millions)	100%	100%

** Note: Largest here is measured by those operators running the most scheduled kilometres operated with wheelchair accessible vehicles.*

Table 12G: Licensed service buses by wheelchair accessibility

	2013	2013	2014	2014	2015	2015
Number of buses that are low-floor wheelchair accessible	137	13%	148	12%	176	13%
Number of buses that have lifts suitable for wheelchair access	308	29%	292	24%	340	26%
Total numbers of buses providing wheelchair accessible services	1062	100%	1,227	100%	1301	100%

13

Availability of TaxSaver tickets by licensed service operators

The TaxSaver Commuter Ticket Scheme allows employees to avail 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.

The information in Table 13B shows that 19% of all operators offer at least one form of TaxSaver Ticket. These tickets are generally used by passengers on regular scheduled services and commuter type services. An annual ticket is the period of time that is usually offered by operators for tickets under the TaxSaver scheme.

Table 13A: Number of operators offering TaxSaver tickets in 2015

Description	2014	2015
All licensed operators offering multiple TaxSaver tickets e.g. Annual and Quarterly	15	15
All licensed operators offering at least one TaxSaver ticket e.g. Annual	26	24

Table 13B: Percent of operators offering TaxSaver tickets in 2015

Description	2014	2015
All licensed operators offering multiple TaxSaver tickets e.g. Annual and Quarterly	12%	12%
All licensed operators offering at least one TaxSaver ticket e.g. Annual	20%	19%

Notes to Tables

Some figures have been included in this bulletin that have been taken from other publications, these have been set out below.

Stated Funded Bus Services:

(i) *NTA (2016), "Bus Statistics for Ireland – State Funded Services, Statistical Bulletin Number 03/2016, July 2016", National Transport Authority, Dublin; available at:*

https://www.nationaltransport.ie/publications/statistics/bulletins/
"Bus Statistics for Ireland – State Funded Services, Statistical Bulletin Number 03/2016, June 2016"

(ii) *NTA (2016), "Rail Statistics for Ireland, Statistical Bulletin Number 02/2016, June 2016", National Transport Authority, Dublin; available at:*

https://www.nationaltransport.ie/publications/statistics/bulletins/
"Rail Statistics for Ireland, Statistical Bulletin Number 02/2016, June 2016"

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