



Bus and Rail Statistics for Ireland

State Funded Services

Statistical Bulletin 2023:
November 2024

- (Total PSO passenger journeys
- (PSO passenger journeys by region
- (Total operated vehicle-kilometres and vehicle seat-kilometres
- (Passenger revenues
- (Passenger revenues by region
- (Free Travel Scheme revenue
- (Public Service Obligation (PSO) subsidy
- (Operator Fleets
- (Age of buses
- (Major bus & rail network changes
- (Wheelchair accessible fleet



NTA
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National Transport Authority

Contents

Introduction	3
1. Total PSO passenger journeys	5
2. PSO passenger journeys by region	11
3. Total operated vehicle-kilometres and vehicle seat-kilometres	19
4. Passenger revenues	24
5. Passenger revenues by region	28
6. Free Travel Scheme revenue	32
7. Public Service Obligation (PSO) subsidy	34
8. Operator Fleets	37
9. Age of buses	39
10. Major bus & rail network changes	40
11. Wheelchair accessible fleet	41

Introduction

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

Bus services

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

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

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

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

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

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

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

Mobilisation progressed on three significant tenders during 2023, the first was for the new W4/W6 routes in Dublin. These services are a key part of the Bus Connects Network Redesign project and launched in June. The second was for the Eastern Coastal Commuter Corridor, previously operated under the Bus Éireann Direct Award Contract as routes 101 & 133. This enhanced connectivity from Co. Louth and Co. Wicklow into Dublin. Services commenced operating under this contract in May 2023.



The Authority awarded a contract with Bus Éireann to operate regular bus services in Carlow Town in July 2023. The contract is for an initial five years with an option to extend for a further two years. Also, Route 139 was re-tendered in late 2023 with the incumbent being successful at tender stage and was notified just before year end to progress to mobilisation.

Local Link provides PSO bus services in many areas of rural Ireland with passenger journeys tending to be local in nature but with connections to more regional and intercity services. It also provides a number of services delivering passengers door-to-door. Management of this programme was transferred to the Authority in April 2012. A set of Local Link offices were established by the Authority to administer the provision of Local Link services planned and funded by the Authority. The Connecting Ireland programme also commenced in 2022, expanding rural bus service provision and providing increased connectivity between towns and villages and other forms of public transport across the country. 2023 saw the implementation of Phase 2 of the Connecting Ireland programme, with 64 new or enhanced services delivered throughout year.

Rail services

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

Light rail services

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

Statistical qualifications

The Authority came into effect on 1 December 2009 and hence the annual statistics in this bulletin begin in 2010 and cover the period 2010 to 2023 inclusive. Some data from prior to 2010 is referenced such as passenger journeys in order to give a historical perspective to data in recent years.

The data provided in this bulletin is based on the public transport operators' periodic and annual returns. The figures used are intended to illustrate broad trends and some are approximations for a number of reasons. Reporting periods can differ slightly, and this can limit the precise accuracy. Rounding has also been used and this can affect overall percentages. Some prior year comparative amounts have been reclassified to be consistent with the current year. Other factors can affect year on year comparisons, most obviously the COVID pandemic, but also severe weather conditions, strikes or temporary amendments to routes.

Individual routes and services may also change over time, which can impact on passenger and revenue reporting. For example, a small number of Bus Éireann services which previously were included in their stage carriage (rural) services a few years ago are now more appropriately included in one of their city services, and likewise Dublin Commuter has now been split with some services categorised as Stage Carriage "East".

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



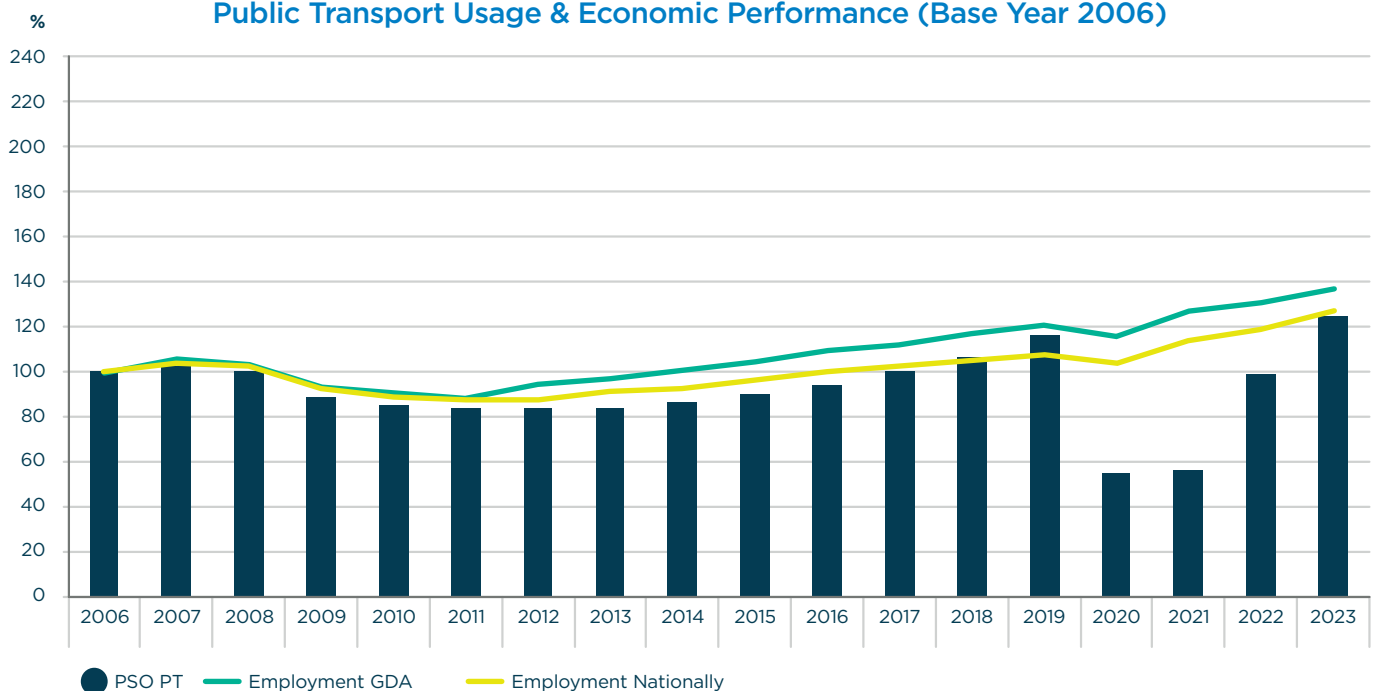


1. Total PSO passenger journeys

Economic outlook

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

Public Transport Usage & Economic Performance (Base Year 2006)



In 2007, passengers travelling by public transport were at a peak. As the first sign of economic decline became evident in 2008 passenger journeys on public transport began to decline, with 2009 seeing reductions in patronage in excess of 10% across all modes of public transport. Total passenger journeys on public transport continued to decline, but at a slower rate, over the next three years up to 2012 although some services such as Luas did see some growth as new Luas lines were opened. By 2013, the decline

in total public transport passenger journeys had halted as the economy began to stabilise. In the six years since 2013 growth in total passenger journeys was strong across all modes of PSO funded public transport, growing in excess of 40% to 2019.

The onset of the COVID-19 global pandemic in March 2020 had a significant impact on the use of public transport across all modes in Ireland. Passenger numbers on PSO services initially

fell to between 10%-20% of pre COVID levels experienced in the previous year, as reduced timetables were introduced and capacity restrictions were imposed across the public transport network. Public health restrictions including social distancing, the mandatory use of face masks on public transport and restrictions on the movement of people within counties and between counties were all introduced at various stages during 2020, with passengers being advised to only travel if their journey was essential and to consider cycling or walking where feasible. 2021 saw a continuation of public health restrictions including the curtailment of capacity on public transport due to social distancing requirements, resulting in minimal growth in overall patronage. This was in contrast with economic performance where the economy

had returned to growth following the reopening of global markets, supported by the introduction of various forms of blended and flexible working arrangements. In 2022, as lockdown measures and capacity restrictions were gradually lifted, public transport patronage steadily returned, reaching pre-pandemic levels by the end of the year, with overall usage equating to 85% of 2019 levels across all PSO services. However, the true recovery from the impacts of COVID-19 was fully realised in 2023, when usage surged, resulting in a 5% increase over 2019 levels across all PSO services, a new record level.

Tables 1A and 1B along with Figure 1.1 illustrate the changes in passenger journeys on exchequer funded public transport services across the State between 2010 and 2023.

Table 1A: Annual passenger journeys (millions)

Year / Operator	Total PSO Bus Services	Total PSO Rail Services	Total Light Rail Services	Total PSO Services	Total change compared to previous year
2010	147.6	38.2	27.5	213.4	
2011	145.3	37.4	29.1	211.8	-1.6
2012	143.6	36.7	29.3	209.7	-2.1
2013	142.9	36.7	30.5	210.1	0.4
2014	147.7	37.8	32.6	218.1	8.0
2015	151.8	39.7	34.6	226.1	8.0
2016	159.3	42.8	34.0	236.1	10.1
2017	169.3	45.5	37.6	252.5	16.4
2018	179.2	48.0	41.8	269.0	16.5
2019	196.2	50.1	48.3	294.6	25.6
2020	100.6	17.9	19.2	137.7	-156.9
2021	103.7	17.4	19.5	140.5	2.9
2022	175.2	35.8	38.7	249.7	109.2
2023	216.4	46.1	48.2	310.6	60.9

Table 1B: Annual passenger journeys (% Change)

Year / Operator	PSO Bus Services	PSO Rail Services	Light Rail Services	Total
2011	-1.6%	-2.2%	5.7%	-0.8%
2012	-1.1%	-1.7%	0.8%	-1.0%
2013	-0.5%	0.0%	4.1%	0.2%
2014	3.4%	2.9%	6.9%	3.8%
2015	2.8%	4.9%	6.1%	3.6%
2016	4.9%	7.9%	-1.6%	4.4%
2017	6.3%	6.3%	10.6%	6.9%
2018	5.8%	5.4%	11.1%	6.5%
2019	9.5%	4.4%	15.6%	9.5%
2020	-48.7%	-64.3%	-60.3%	-53.3%
2021	3.0%	-2.5%	1.6%	2.1%
2022	69.0%	105.9%	98.5%	77.7%
2023	23.5%	28.5%	24.7%	24.4%

The data in Table 1A shows the number of passenger journeys carried across each of the main modes of public transport over the period 2010 to 2023. In general, the numbers reflect trends in the economy with a fall in passenger journey numbers in 2011. Following a period of stabilisation across all modes, overall passenger journeys began to increase year on year with growth accelerating from 8 million per annum in 2014 to a record increase in excess of 25 million in 2019. As alluded to above, the global pandemic and associated public health related restrictions had a dramatic negative impact on public transport, commencing in March 2020, with minor gains of 2.1% being made in patronage across all modes in 2021, before a significant upturn in 2022, with gains of 77.7% on the previous year. The recovery from the impacts of COVID-19, as well as the positive impact of new and improved services, is fully reflected in 2023 as record passenger journey numbers were recorded. There was a patronage increase of 24.4% from the 2022 to 2023, with full year results surpassing 2019 levels by 5% across all PSO services.

The Authority has, in partnership with bus operators, continued to improve the transport

network to ensure that a better service can be provided to the travelling public, to meet evolving patterns of travel demand.

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

In 2022, the two further phases of the BusConnects programme were delivered namely the North Side Orbital services as well as G Spine services between Red Cow and Liffey Valley to the city centre. Nationally, phase 1 of the Connecting Ireland programme was also delivered, with enhanced rural services. In a bid to boost the return to public transport as a result of

a significant increase in the costs of living as the economy emerged from the COVID-19 pandemic, the Authority also implemented the government's 20% cost of living fares reduction across all forms of PSO public transport services in early 2022, in addition to the previously announced Young Adult Card Scheme, offering young people a 50% reduction on equivalent Adult fares. The combination of improved services and lower fares helped to bring patronage levels back close to pre-pandemic levels by the end of the year. The 20% cost of living fares reduction across all forms of PSO public transport remained in place throughout 2023.

In 2023, two further phases of the BusConnects programme were delivered, Phase 5a (W Orbital routes W4, W61 and W62) launched in June and 5b (Southern Orbital, Radial and Local routes S2, S4, S6, S8, 74, W2, L25, and L55) launched in November. Nationally, phase 2 of the Connecting Ireland programme was also delivered, which saw 64 new and enhanced routes introduced. Two new town bus services began operation in 2023. Carlow Town services launched in August and Clonmel Town services launched in December.

Figure 1.1: Total PSO Passenger Journeys 2010 - 2023 (millions)

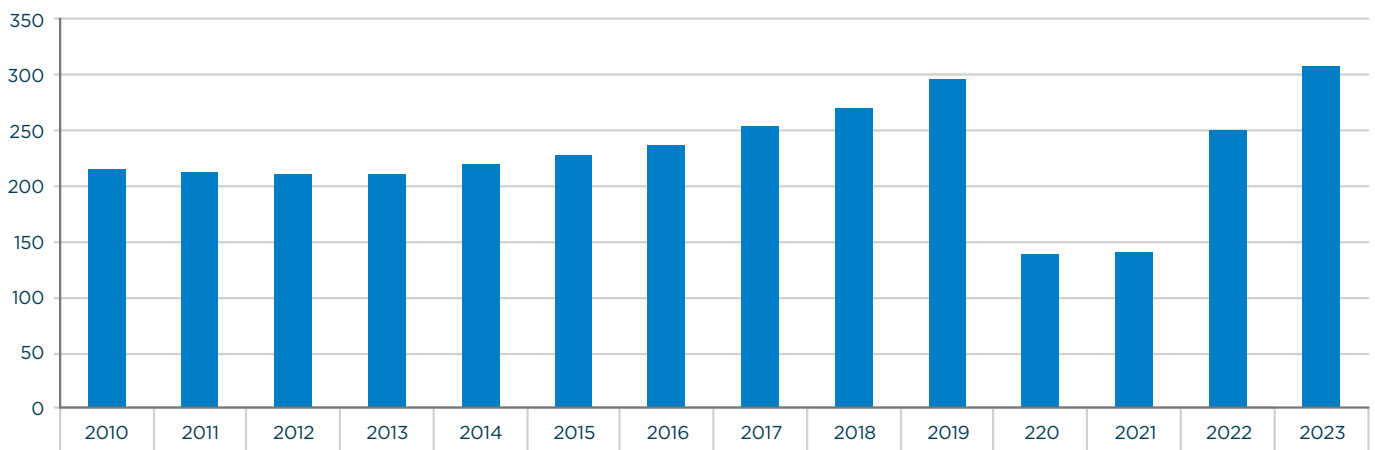


Figure 1.1 shows all PSO passenger journeys combined from 2010 to 2023. This shows that passenger journey numbers declined marginally from 2010 to 2012 as the economy faltered, before stabilising in 2013. There was then a period of consistent growth between 2014 and 2016,

averaging 4% annually. 2017 to 2019 saw increasingly greater levels of growth in patronage of between 6.7% and 9.5%, with record passenger numbers in 2019 of just over 294 million. Due to the impact of COVID-19, 2020 saw the largest decreases to date, with overall patronage falling by over half when compared to the previous year, to 137.7 million. In 2021, patronage saw only marginal gains as ongoing restrictions limited the return to public transport until early 2022. However, a significant upturn occurred later that year, driven in part by the fare initiatives mentioned earlier. The momentum continued into 2023, with further increases over 2022 levels. In 2023, public transport usage not only recovered, but also surpassed 2019 levels, reaching a new record peak of 310.6 million passengers.



Figure 1.2: PSO Public Transport Passenger Journeys by Mode, 2010 -2023 (millions)

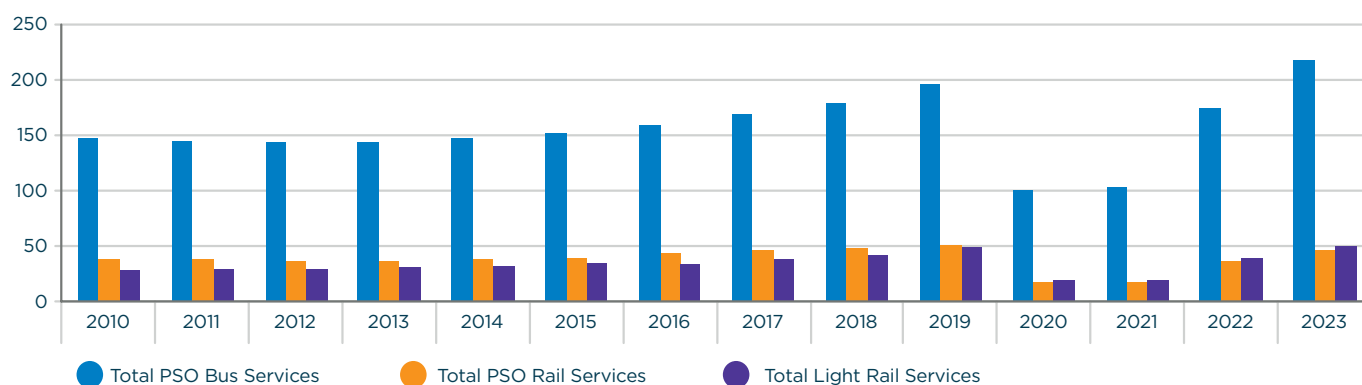


Figure 1.2 shows the total passenger journeys by mode from 2010 to 2023. It is clear from the chart that bus services carry many more passengers nationally than all of the other modes. Following the recovery from the pandemic, bus services continue to maintain a traditional share of all public transport journeys at approximately 69.7%, with rail and light rail services accounting for 14.8% and 15.5% respectively.

Bus services

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

Dublin city bus services carry more than half of the total passenger journeys in Ireland (53.5% in 2022 and 52.2% in 2023). Following a number of years of decreases between 2010 and 2013 as a result of the economic downturn, passenger journeys on Dublin city bus services increased by an average of 4.5% each year to 2019, reaching 152.7 million. In recent years this has been the result of additional services and passenger growth associated with the transfer of services to Go Ahead Ireland, along with the provision of additional services by Dublin Bus. Patronage on Dublin city bus services fell by 49.2% in 2020 and grew modestly by 2.1% in 2021, as a result of continued pandemic related restrictions. The delivery of six phases of the BusConnects programme between 2021 and 2023 has coincided with a significant return to bus services in Dublin city in 2023 following the recovery from

the pandemic, delivering a year-on-year increase of 21.5% and reaching a new peak of 162.2 million.

PSO bus passenger numbers outside Dublin, predominantly operated by Bus Éireann, saw relatively moderate levels of growth in the years between 2011 and 2017, before patronage grew in excess of 13% in 2018 and 2019 (reaching 39.9 million journeys in 2019) following investment by the Authority in additional services and improved frequencies. Like all other PSO services, patronage sharply declined by nearly half to 20.0 million in 2020. Moderate gains of 7% were made in 2021, with regional cities contributing to this growth. The trend continued in 2022, with patronage rising impressively by 66.9%. The recovery continued in 2023, when a new peak of 43.1 million passengers was reached—an increase of 20.9% over the previous year and an 8.1% rise above 2019 levels.

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

growth of 85.7%. The momentum continued into 2023 with the rollout of Phase 2 of the Connecting Ireland programme, resulting in a further 53.7% increase from 2022, underscoring the strong expansion of rural bus services.

Rail services

Rail services operated by Iarnród Éireann saw an average annual growth in patronage of 5.3% from 2014 to 2019, reaching a record 50.1 million passenger journeys in 2019. This growth was bolstered by the introduction of a 10-minute DART service and enhancements to Intercity and commuter services, which increased capacity. However, in 2020, rail services, especially Dublin Commuter and DART services, experienced the most significant decline among all transport modes, with a 64% drop in patronage due to the pandemic. This decline continued into 2021 with a further decrease of 2.5% as many former commuters continued to work from home. A strong recovery began in early 2022 with a remarkable 105.9% increase in patronage compared to the previous year. Building on this recovery, 2023 saw an additional 28.5% increase from 2022, with rail services reaching 92% of the peak 2019 levels, highlighting a substantial resurgence in rail travel.

Light rail services

Passenger journeys on Luas services operated by Transdev Dublin Light Rail Limited have largely followed the pattern of other operators with patronage trending upwards until 2019. Increased patronage on this mode was aided by the opening of extensions to both the Green Line and the Red Line between December 2009 and July 2011. The upward trend in patronage was to continue until 2019, where a 15.6% increase saw 48.3 million passenger journeys. The opening of Luas CrossCity on December 9, 2017, along with the introduction of new extended trams on the Green Line in 2019, significantly boosted passenger capacity and influenced the growth in passenger journeys. However, the pandemic caused a severe 60.3% decline in 2020 as public transport use was restricted to essential travel only. In 2021, light rail services saw a modest recovery of 1.6%. The rebound accelerated in 2022, with a notable 98.5% increase in patronage as the capital emerged from lockdowns. This positive trend continued into 2023, with a further 24.7% increase from the previous year, bringing light rail services back to 99.7% of the peak levels recorded in 2019.

Factors influencing passenger journeys

From time to time public transport operators, with the agreement of the Authority, review their reporting methodologies to provide more accurate data on their services. When this occurs the operator usually restates the data for the previous year so as it can be compared with the current year and future years. Bus Éireann restated their 2013 passenger journeys while Iarnród Éireann restated their 2012 passenger journeys. While restatements result in a slight adjustment to the comparison between one year and the next, they do not affect the overall trend in passenger journey growth over a number of years.

In any year, particular events may affect passenger numbers on one or more operators. One such event is industrial action, which has affected the main operators (Dublin Bus, Bus Éireann, Iarnród Éireann and Luas) to varying degrees between 2013 and 2017. Weather events can also affect passenger numbers. 2017 saw the arrival of ex-hurricane Ophelia which disrupted most public transport services for at least one day with Luas not operating for a second day due to damage caused by the largest storm to hit Ireland in almost 50 years. Extreme weather events also impacted on 2018 figures, with the onset of Storm Emma in March, resulting in heavy snow and the cancellation of services over a number of days.

March 2020 saw the onset of the COVID-19 global pandemic, which had a dramatic negative impact on the uptake of public transport. Patronage shrank by as much as 80%-90% in the early stages of the pandemic, with government imposed travel restrictions, reduced timetables and capacity restrictions imposed, and with health guidance requiring adequate social distancing and mandatory use of face masks. The significant decreases in the use of public transport resulted in substantial revenue losses, which was absorbed by additional funding from Government to ensure services continued to operate in line with public health restrictions, which continued to varying degrees for large parts of 2021 and early 2022. In 2023, public transport usage not only recovered from the impact of the COVID-19 pandemic but also surpassed pre-pandemic levels seen in 2019. As restrictions eased and confidence in public spaces returned, ridership across various modes of transport increased significantly, driven by a renewed usage of public transport for daily commutes as well as increased travel outside peak times and at weekends, the provision of new and improved public transport services, and lower fares.



2. PSO passenger journeys by region

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

Bus services operated by Bus Éireann provide services to all 26 counties, and Northern Ireland.

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

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

Dublin Region

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

Year/ Operator	Dublin City Bus Services	Dublin Commuter Bus Services	Dublin Commuter & Dart Rail Services	Luas Light Rail Services	Total Passenger Journeys
2013	112.5	4.9	25.9	30.5	173.8
2014	116.3	5.0	26.5	32.6	180.4
2015	119.8	5.1	28.1	34.6	187.6
2016	125.4	5.5	30.9	34.0	195.8
2017	136.3	5.1	32.8	37.6	211.7
2018	141.5	5.9	34.2	41.8	223.4
2019	152.7	6.6	35.6	48.3	243.2
2020	77.6	3.4	12.8	19.2	113.0
2021	78.9	3.8	11.8	19.5	114.0
2022	133.5	6.8	24.7	38.7	203.7
2023	162.2	8.5	33.5	48.2	252.5

Table 2A shows trends in passenger journeys for the Dublin region. In the period between 2013 and 2019 total passenger journeys in the region grew by just under 40% to a total of 243.2 million, before the onset of the pandemic in 2020, resulting in a decline of 129.3 million from 2019 to 2021.

In 2021, patronage in the Dublin region remained largely similar to 2020 levels due to ongoing restrictions impacting public transport usage. A notable decline of approximately one million passengers was observed on Dublin commuter rail and Dart services, driven by government advice encouraging remote work. The recovery began in 2022, with the gradual reopening of

the economy contributing to an additional 15.9 million passenger journeys on Dublin commuter rail, DART, and bus services. Dublin city bus services, traditionally the highest in passenger numbers, saw a significant increase of 54.6 million passenger journeys, marking the largest numerical shift. The recovery continued robustly into 2023, with a 24% increase in passenger journeys across all modes in the Dublin region from the previous year, totalling an additional 48.8 million journeys. Of this, 59% was attributed to Dublin city bus services. Dublin Commuter and Dart Rail Services saw the most substantial percentage change, with a 35.8% increase, translating to 8.8 million additional passenger journeys.

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

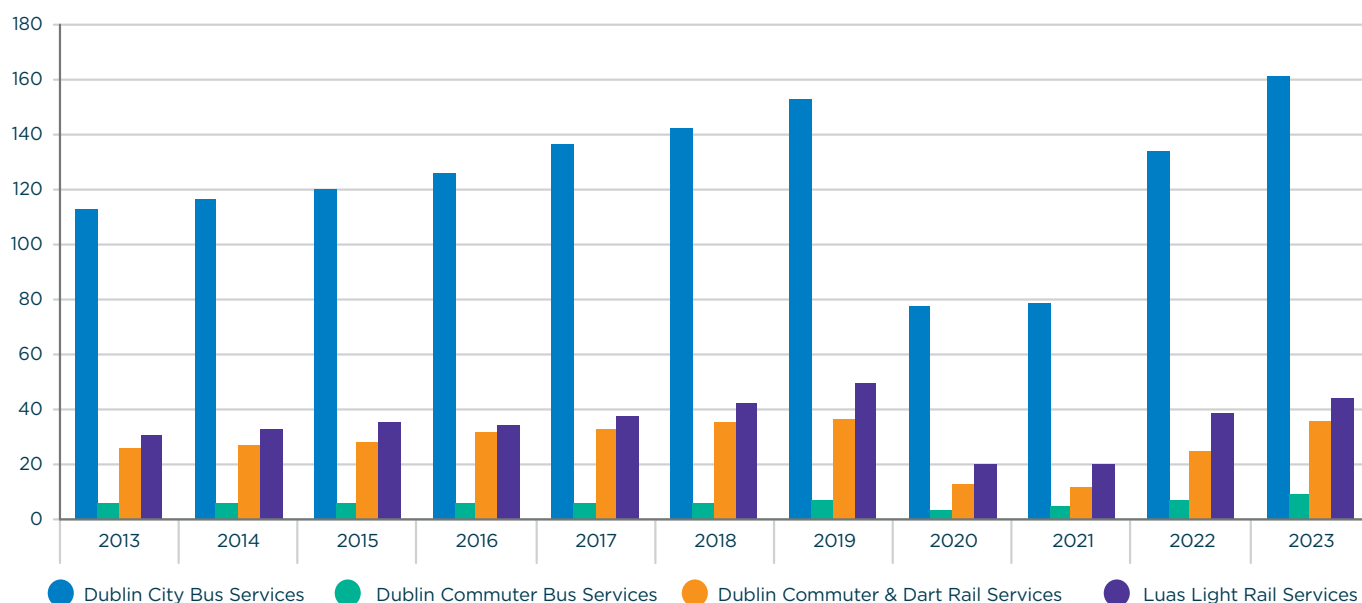
Year/ Operator	Dublin City Bus Services	Dublin City Bus Commuter Services	Dublin Commuter & Dart Rail Services	Light Rail Services	Total Passenger Journeys
2013 to 2019	35.8%	34.4%	37.1%	58.5%	39.9%
2019 to 2023	6.2%	29.3%	-5.8%	-0.3%	3.8%
2022 to 2023	21.5%	25.4%	35.8%	24.7%	24.0%

As alluded to above, in the period between 2013 and 2019, patronage across all modes in the Dublin region grew by just under 40%. Table 2B also shows the change in passenger demand per mode between 2019 and 2023 when from March 2020 public transport was significantly impacted by the COVID-19 pandemic. Overall, the pandemic caused a significant decline in public transport demand, with patronage dropping by just over 50% from its peak in 2019 to the following year. However, by the end of 2023, passenger journeys had rebounded strongly, surpassing the previous record levels by 3.8%, indicating a substantial recovery and growth beyond pre-pandemic figures.

In 2023, following the pandemic recovery, Dublin city bus services and commuter bus services exceeded pre-COVID patronage levels, while Dublin rail and light rail services almost returned to their pre-COVID levels.

Figure 2.1 highlights the very high modal share for bus services in the Dublin region from 2013 to 2023. Demand for bus services continues to be significantly greater than that of other modes.



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


Cork city commuter area

Table 2C and Figure 2.2 show the passenger journeys on PSO subsidised public transport in Cork city commuter area. Both Bus Éireann and Iarnród Éireann provide services in the Cork commuter area. The difference in passenger journeys in Cork commuter area compared to the Dublin region has traditionally been significant. The Dublin region typically has approximately 14

passenger journeys on public transport for every one passenger journey in Cork. This has remained the case in 2023 where there were 18.2 million passenger journeys in the Cork commuter area, compared to 252.5 million in the Dublin region. Bus users accounted for 90.3% of public transport journeys in Cork in 2022 and 89 % in 2023.

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

Year/ Operator	Bus Services	Rail Services	Total Passenger Journeys
2013	10.5	0.9	11.5
2014	11.0	1.1	12.1
2015	11.7	1.1	12.9
2016	12.6	1.2	13.8
2017	12.1	1.3	13.4
2018	13.9	1.3	15.3
2019	15.9	1.5	17.3
2020	7.9	0.6	8.5
2021	8.0	0.6	8.6
2022	12.7	1.4	14.0
2023	16.2	2.0	18.2

Figure 2.2: Cork Commuter annual PSO passenger journeys (millions)

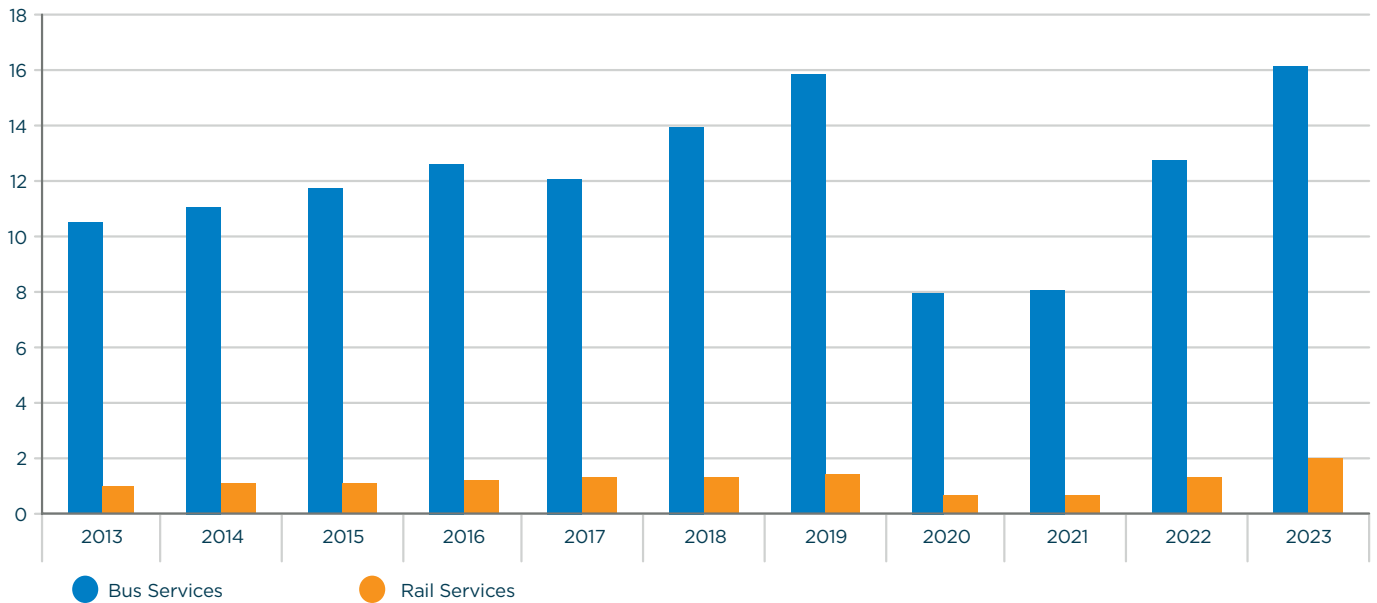


Table 2D: Cork City Area Annual Passenger Journeys (% Change)

Year/ Operator	Bus Services	Rail Services	Total Passenger Journeys
2013 to 2019	50.6%	55.6%	51.0%
2019 to 2023	2.0%	38.0%	5.0%

Table 2D shows the change in passenger journeys between 2013 and 2019 and also 2019 and 2023. Patronage up to 2019 had been increasing steadily, with the reconfiguration of the city network contributing to growth in excess of 50% across both main public transport modes.

In line with trends seen in Dublin and nationally, patronage in the Cork region in 2023 reached new peak levels, increasing by 5% compared to 2019. This has been particularly pronounced on rail services as passengers have returned in significant numbers to Cork city as the local economy began to fully recover from the impact of the pandemic.



Cork city commuter area

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

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

Year/ Operator	Bus Services Galway	Bus Services Limerick	Bus Services Waterford	National Bus Services	Intercity Rail Services	Rural Bus Services	Total
2013	3.8	2.8	0.8	4.2	9.9	1.7	23.3
2014	4.1	2.8	0.8	4.1	10.2	1.8	23.9
2015	4.0	2.8	0.8	4.1	10.4	1.8	23.9
2016	4.2	2.9	0.8	4.2	10.7	1.8	24.7
2017	4.2	3.2	0.8	4.2	11.4	1.9	25.6
2018	4.7	3.5	0.8	5.2	12.4	2.3	28.9
2019	5.7	3.9	1.2	5.8	13.1	2.5	32.3
2020	3.0	2.3	0.7	2.8	4.4	1.4	14.7
2021	3.3	2.6	0.8	3.3	5.0	1.5	16.5
2022	5.6	4.3	1.2	5.7	9.8	2.8	29.5
2023	6.8	5.1	1.5	6.6	12.6	4.4	36.9

Total passenger journeys on these services increased year on year from 2013 and reached 32.3 million in 2019, before 2020 saw a decline of over 50% to 14.7 million. The position recovered somewhat more positively outside of Dublin and Cork in 2021 with a 12.6% increase in patronage, followed with a significant 78.4% increase in 2022, and then mirroring the picture seen nationally in 2023, with total passenger journeys increased by 25.3%, surpassing 2019 levels and reaching a new record of 36.9 million passenger journeys.

Bus services within the other regional cities accounted for 36.2% of travel outside of Dublin and Cork in 2023, while Intercity rail services carried approximately 34% of these passengers. National stage carriage bus services and rural bus services operated under the Local Link brand carried the balance of passenger journeys, with a notable increase of 53.7% from the previous year on Rural Bus services as the Connecting Ireland programme continued to rollout changes.



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

Year/Operator	Bus Services Galway	Bus Services Limerick	Bus Services Waterford	National Bus Services	Intercity Rail Services	Rural Bus Services	Total
2013 to 2019	48.1%	42.9%	49.2%	37.5%	32.1%	46.2%	38.6%
2019 to 2023	19.8%	28.9%	23.2%	14.0%	-3.8%	71.0%	14.5%

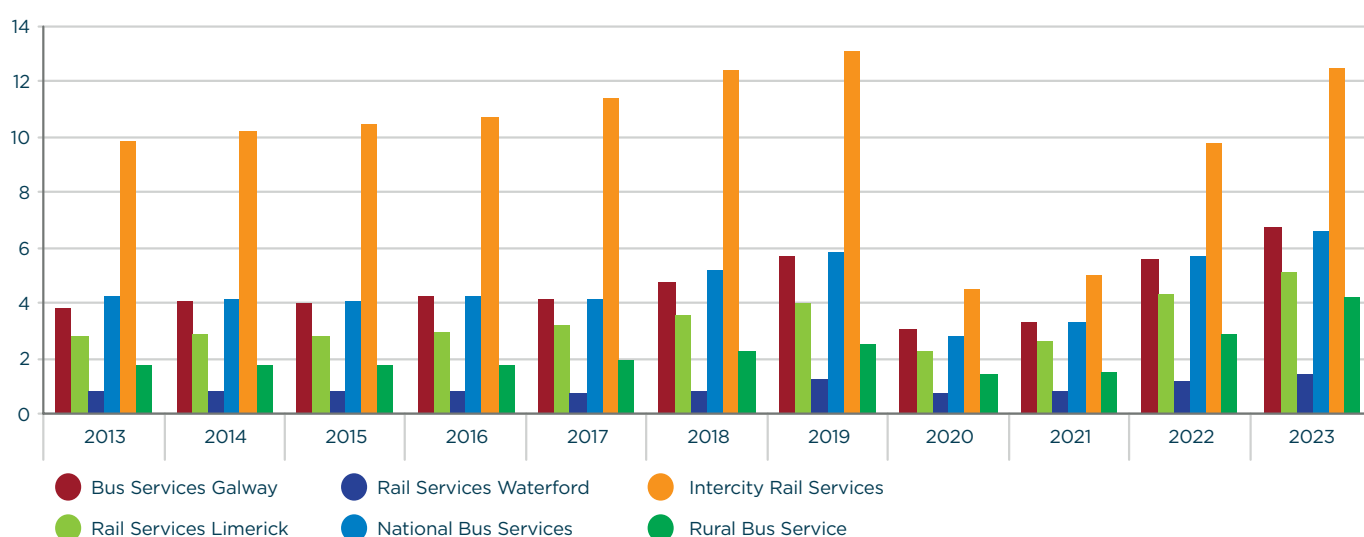
Passenger journeys outside of Dublin and Cork increased by similar margins between 2013 and 2019, averaging 38.6% across all modes. The upturn in demand on bus services in the regional cities was in part helped by the introduction of enhanced timetables in Galway, Limerick and Waterford and the promotion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

As with the Dublin and Cork city areas, the use of public transport fell dramatically across other regional cities and elsewhere nationally in 2020, with passenger numbers decreasing by over 54%. As discussed above, 2023 saw a marked growth in all other markets increasing patronage by between 16.6% (National Bus Services) and 53.7% (Rural Bus Services) from the previous

year. This has resulted in the overall picture seeing passenger demand increasing by 14.5%, compared to the previous record high of 2019, demonstrating a remarkable return to growth outside of the Dublin and Cork areas.

In numerical terms, Intercity rail services account for the most significant sector outside of Dublin and Cork. Demand on these services grew steadily between 2013 and 2019 (32.1%) before seeing a dramatic decrease in 2020, with passenger demand 55.0% less than that seen seven years previous. Patronage has continued to recover strongly in 2023, adding almost 3 million passenger journeys from the previous year and now sits at 96% of 2019 peak levels.

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



When looking at the change in passenger journeys between 2013 and 2023 the following observations can be made:

- (Growth between 2013 and 2019 was strong across all market segments, with an average increase of 38.6%. Following a decline of 36.9% in 2020, a relative recovery was made in 2021 (-29.0%) followed by a resurgence in 2022 (+26.7%). Strong growth continued in 2023 with a 58.7% increase in patronage since 2013.
- (Intercity rail services carry the largest share of passengers outside of the Dublin and Cork areas, with 13.1 million passenger journeys in 2019, increasing from 4.4 in 2020, to 9.8 million in 2022 and a further increase of 28.1% in 2023 to 12.6 million passenger journeys.
- (Rural bus services typically carry much smaller cohorts of passengers across the country, however with the launch of Phase 2 of Connecting Ireland in 2023, these services have experienced the highest year on year growth rate of 53.7% in 2023.
- (National bus services (stage carriage) experienced strong growth up to 2019, accounting for 5.8 million passenger journeys in that year, before falling to 2.8 million in 2020. In 2022, an increase of 5.7 million passenger journeys recorded compared to 2021 (+73.3%). This market increased by 16.6% in 2023, surpassing 2019 previous peak highs.
- (Bus services in Galway, Limerick and Waterford also saw increased patronage in 2023, with an average increase of 21.9% compared to 2022.

Figure 2.4 illustrates the change in passenger demand across all sectors between 2022 and 2023. Following initial declines observed in 2020, some markets continued to remain suppressed in patronage terms in 2021 such as Dublin Commuter & Dart services as well as Commuter rail services in Cork, demonstrating that large cohorts of passengers continued to observe government guidance to work from home for large parts of that year. In 2022, patronage levels began to recover, approaching pre-COVID figures. However, in 2023, public transport services across the country saw significant progress, with these markets leading the way towards a full recovery. By 2023, public transport usage reached new record highs, averaging an 18.6% increase across all sectors compared to 2019. Notably, all markets experienced an average growth of 28.9% from the previous year, demonstrating a remarkable return to normalcy despite the continued prevalence of remote and hybrid work practices. This surge in patronage suggests that initiatives such as fare reductions, Young Adult fares, and ongoing improvements to the public transport network have successfully encouraged passengers to return to using these services.



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

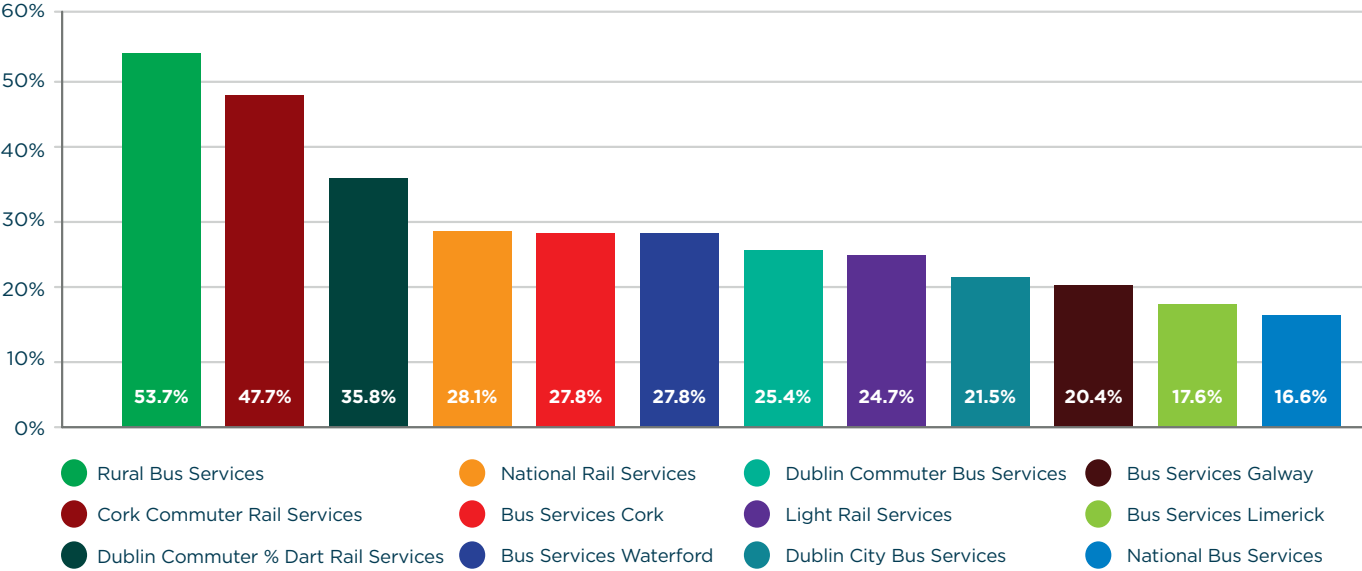


Figure 2.5: PSO Passenger Journeys by Region 2023

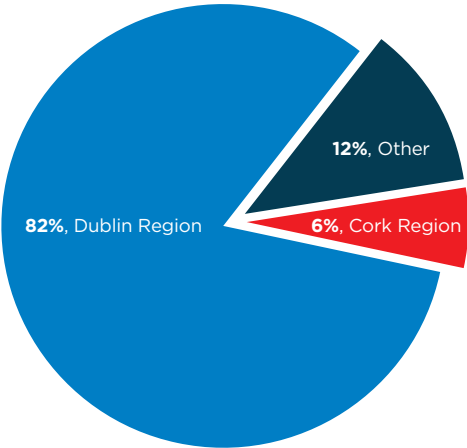
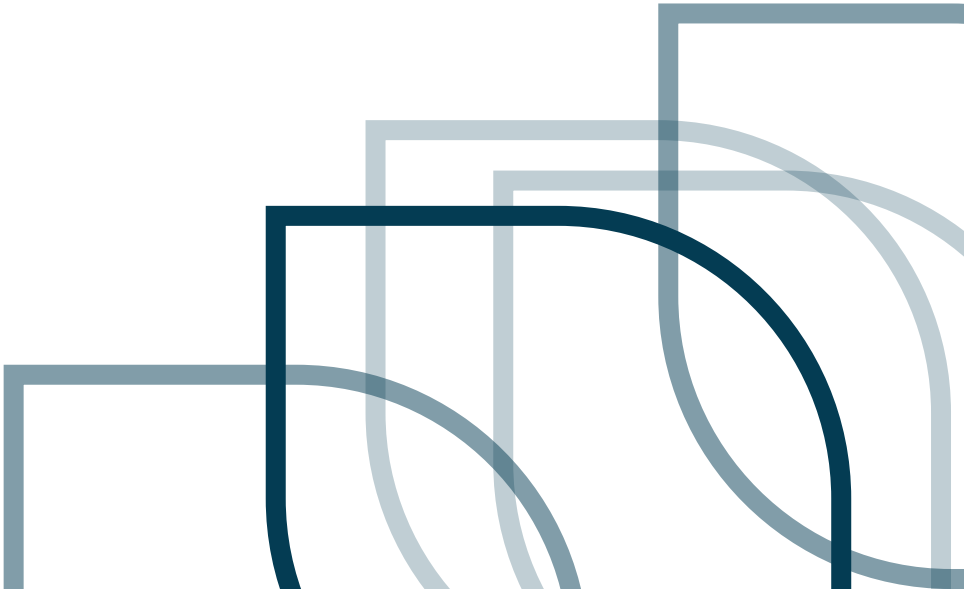


Figure 2.5 shows all passenger journeys in 2023 broken down into three regions: the Dublin region, the Cork region and the rest of Ireland. The trend in 2023 remained similar to previous years with the Dublin region accounting for 82% of all PSO public transport journeys. The Cork region accounts for 6% of all passenger journeys while the rest of Ireland accounts for 12% of all passenger journeys.





3.

Total operated vehicle-kilometres and vehicle seat-kilometres

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

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

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

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

Factors affecting operated vehicle and seat kilometres

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

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

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

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

In 2022, the reductions in planned kilometres were unwound, helping to cater for the increased demand for travel compared to the pandemic-affected periods of 2020 and 2021. However, bus driver shortages were experienced by all operators during 2022 and 2023, mirroring shortages in many areas of the national economy. This impacted the number of kilometres that could be operated during certain periods of these years.

In 2023, operated vehicle kilometres increased from 2022 as further improvements were introduced to the public transport network through network redesign, new town services and the addition of other new and improved services to the PSO network.

Bus services

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

In 2018, Dublin Bus figures receded somewhat owing to a small portion of services being transferred to Go Ahead Ireland, and also extreme weather events earlier in the year. The tendering of bus services in conjunction with the introduction of other new services nationally led to sustained growth in overall vehicle kilometres operated and seat kilometres in both 2018 and in 2019. This trend has continued on Dublin city bus services up to 2023 with increases seen across both metrics.

Bus Éireann also experienced gains in both metrics between 2015 and 2019 owing to enhanced service delivery by the Authority outside the Dublin region, with supporting

marketing campaigns towards the use of leap. Vehicle seat kilometres increased steadily over the years as a result of bus capacities increasing, allowing them to carry more passengers with the same number of services operated. Although both operated kilometres and seat kilometres declined slightly in 2020 due to nationwide service restrictions, they rebounded in 2021, with operated kilometers increasing by 7.7% and seat kilometers by 10.87%, reflecting improved performance outside Dublin and Cork. This positive trend continued into 2023, with further gains driven by ongoing service enhancements across the country,

Light rail Services

Vehicle-kilometres operated on light rail services increased significantly in 2011 following the opening of Luas extensions in late 2010. In 2013 the vehicle kilometres reduced as the interval between some services was extended but this was reversed partially the following year. The reduction in vehicle kilometres in 2016 was due to a combination of closing the red Luas line between Jervis and the Point for six weeks to allow for Luas CrossCity works and 12 days of industrial action when no services were operated.

In the years from 2017 to 2019 Luas benefitted from strong growth in passenger journeys. A key contributory factor to the increases in both kilometres operated and seat-kilometres was the opening of the Luas Cross City extension on the Green line in December 2017 and the introduction of extended trams, also on the Green line, further bolstering capacity. Luas services saw the lowest drop off in terms of kilometres operated and seat kilometres across the modes in 2020 with no significant pandemic related service reductions, however marginal decreases across both metrics in 2021 and 2022 is more likely to have been a result of performance related lost kilometres. Both metrics saw an increase in 2023 as performance relating to lost kilometres improved further.

Rail Services

Operated vehicle kilometres on rail services have remained relatively constant over the years between 2010 and 2016 but the operated seat kilometres dropped each year between 2011 and 2014. This is because Iarnród Éireann implemented a fleet strategy which allowed them to maintain the number of services provided but reduce costs by matching more closely the number of carriages required to the number of passengers travelling. In 2015 and 2016 in line with passenger journey numbers growing they adjusted upwards the number of carriages used on various services thereby increasing the number

of vehicle seat kilometres. The introduction of a 10 minute Dart service in late 2018 and enhancements on Intercity and Commuter services to and from Dublin and Galway in 2019 resulted in operated kilometre increases of 9.2% and 6.6% in seat kilometres in 2019. The pandemic had a significant impact on rail services in 2020, as restrictions on public transport drastically altered the travel patterns of regular commuters. However, rail services began to recover in 2021, with a more substantial rebound in 2022 as intercity services were restored. This positive trend continued into 2023, with rail services experiencing further increases in both usage and service provision, signalling a strong and ongoing recovery.

Table 3A: Annual operated vehicle kilometres (millions)

Year / Operator	PSO Bus Services	PSO Rail Services	Light Rail Services	Total	Total Annual Change
2010	87.0	16.0	2.9	105.8	
2011	84.2	16.0	3.7	103.8	-2.0
2012	82.4	16.0	3.8	102.2	-1.6
2013	76.8	16.0	3.5	96.3	-5.9
2014	80.3	16.0	3.7	100.0	3.7
2015	81.2	16.0	3.7	100.8	0.9
2016	82.9	16.0	3.5	102.3	1.5
2017	84.2	15.0	3.7	102.9	0.5
2018	91.0	16.2	4.1	111.3	8.4
2019	98.7	17.7	4.4	120.8	9.5
2020	102.6	14.7	4.3	121.7	0.9
2021	106.1	15.7	4.2	125.9	4.2
2022	109.8	17.6	4.1	131.5	5.6
2023	117.3	18.0	4.3	139.6	8.1

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

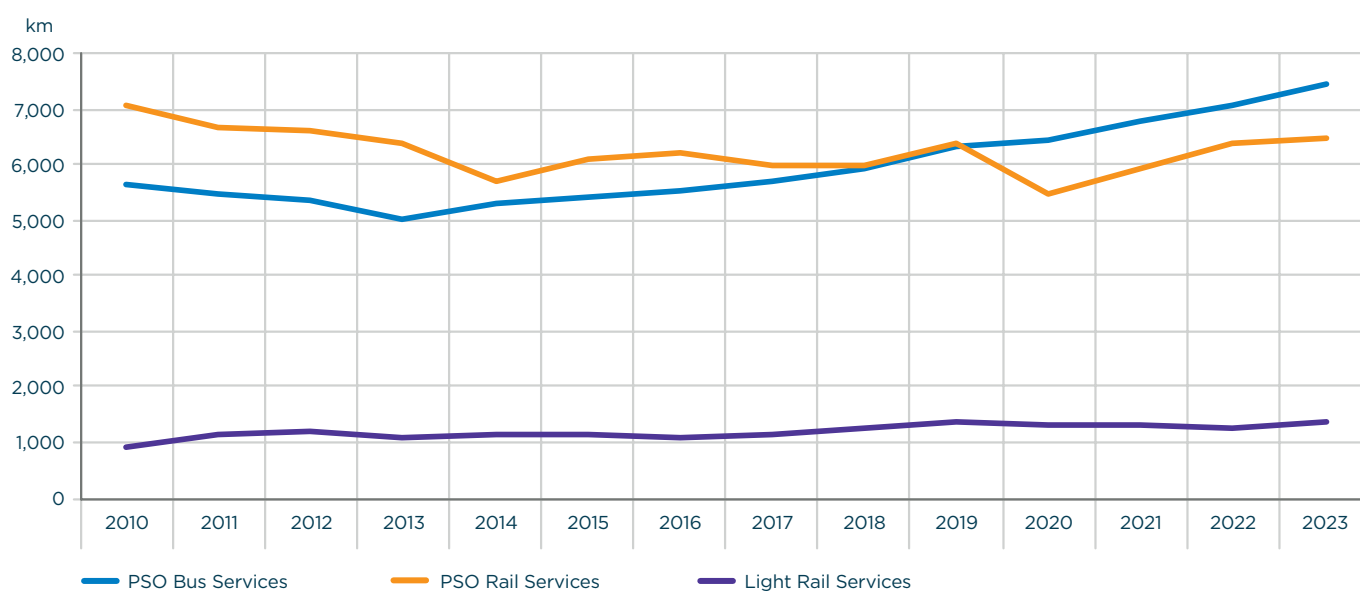
Year/Operator	PSO Bus Services	PSO Rail Services	Light Rail Services	Total Annual Percentage Change
2011	-3.2%	0.1%	27.3%	-1.9%
2012	-2.1%	0.0%	4.0%	-1.6%
2013	-6.8%	0.0%	-7.6%	-5.8%
2014	4.6%	0.0%	3.5%	3.8%
2015	1.1%	0.0%	-0.1%	0.9%
2016	2.1%	-0.1%	-4.7%	1.5%
2017	1.5%	-5.7%	4.9%	0.5%
2018	8.1%	7.7%	11.0%	8.2%
2019	8.5%	9.0%	8.0%	8.5%
2020	4.0%	-16.6%	-1.5%	0.8%
2021	3.3%	6.5%	-3.7%	3.5%
2022	3.5%	12.1%	-0.8%	4.4%
2023	6.9%	2.3%	4.5%	6.2%
2010 to 2023	34.8%	12.9%	48.9%	31.9%

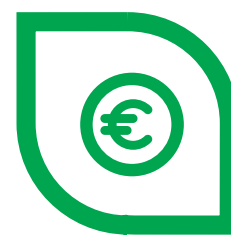
Table 3C: Annual operated vehicle seat kilometres (millions)

Year / Operator	PSO Bus Services	PSO Rail Services	Light Rail Services	Total	Total Annual Change
2010	5,633.8	7,063.1	898.4	13,595.3	
2011	5,450.7	6,677.6	1,143.1	13,271.3	-323.9
2012	5,349.9	6,623.0	1,188.9	13,161.9	-109.5
2013	5,021.5	6,398.0	1,098.8	12,518.3	-643.6
2014	5,294.0	5,707.0	1,137.0	12,138.0	-380.3
2015	5,410.5	6,123.2	1,135.8	12,669.5	531.5
2016	5,499.7	6,208.3	1,081.9	12,789.9	120.4
2017	5,709.7	5,961.4	1,134.9	12,806.0	16.1
2018	5,944.2	5,986.6	1,260.3	13,191.1	385.1
2019	6,322.3	6,379.1	1,363.4	14,064.8	873.6
2020	6,457.4	5,448.7	1,339.9	13,246.0	-818.8
2021	6,759.5	5,901.9	1,290.8	13,952.2	706.2
2022	7,077.8	6,385.3	1,280.5	14,743.5	791.4
2023	7,483.1	6,455.3	1,337.5	15,275.9	532.4

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

Year/Operator	PSO Bus Services	PSO Rail Services	Light Rail Services	Total Annual Percentage Change
2011	-3.3%	-5.5%	27.2%	-2.4%
2012	-1.8%	-0.8%	4.0%	-0.8%
2013	-6.1%	3.7%	-7.6%	-4.9%
2014	-2.8%	-10.8%	3.5%	-3.0%
2015	2.2%	7.3%	-0.1%	4.4%
2016	1.6%	1.4%	-4.7%	0.9%
2017	3.8%	-4.0%	4.9%	0.1%
2018	4.1%	0.4%	11.0%	3.0%
2019	6.4%	6.6%	8.2%	6.6%
2020	2.1%	-14.6%	-1.7%	-5.8%
2021	4.7%	8.3%	-3.7%	5.3%
2022	4.7%	8.2%	-0.8%	5.7%
2023	5.7%	1.1%	4.5%	3.6%
2010 to 2023	32.8%	-8.6%	48.9%	12.4%

Figure 3.1: Annual Vehicle Seat Kilometres Operated 2010 - 2023




4. Passenger revenues

Passenger revenues across each of the modes of public transport are shown in Table 4A. Passenger revenues for bus, rail and light rail services are made up of cash fare revenue, Leap revenue, and prepaid ticket sales (including TaxSaver tickets), as well as the free travel grant from the Department of Social Protection (DSP). Revenues for rural bus services operated by Local Link also includes revenue which is paid to Local Link from agencies such as the Health Service Executive (HSE) or from community groups for the provision of specific bus services.

Passenger revenues reported in this chapter do not include the annual Public Service Obligation subsidy, which is outlined in Chapter 7. Passenger revenue only relates to contracted PSO services and does not include commercial sources (e.g. Bus Éireann Expressway services).

Changes in passenger revenues is as a result of associated rises or falls in passenger journeys or average fares, or both. As the use of Leap e-purse has grown across the modes it has had the effect of moderating passenger revenue growth due to the significant fares discounts available. The Free Travel Grant from DSP has increased very little since 2010 despite significant increases in free travel passengers, which also has a moderating effect on the growth in passenger revenues. Significant fares increases were approved by the Authority for 2012 and 2013 to compensate for loss in PSO subsidy and these fare increases enabled the growth in passenger revenues despite passenger journeys falling slightly during this period. Between 2014 and 2019 average fare increases were moderate and it was growth in passenger journeys which was the main contributor to passenger revenue growth.

Owing largely to the COVID-19 pandemic there were no fare changes in 2020 or 2021 other than the introduction of the 90 minute fare in the Dublin metropolitan area. The 90 minute fare allows for free transfer between different transport modes within 90 minutes of initial tag on, which in itself is revenue diluting, however this impact was difficult to ascertain during sustained

periods of capacity restrictions across the PSO network in 2020 and 2021.

In 2019, record passenger journeys led to a 6.8% increase in revenues across all modes of public transport. However, the onset of the COVID-19 pandemic in March 2020 had a devastating impact on fare revenues, causing a steep 51.2% year-on-year decline from €660.3 million to €322.5 million. In 2021, passenger revenues saw a modest 1.9% increase to €328.7 million, as government restrictions continued to significantly affect public transport usage. The recovery gained momentum in 2022, with revenues rising by 41.4% to €466.7 million, as most restrictions were lifted early in the year. This upward trend continued into 2023, with revenues growing by 11.6% to €520.7 million, bringing total passenger revenues to 79% of the peak levels seen in 2019.

Due to the significant impact of increased costs of living as the economy emerged from the COVID-19 pandemic, the Authority implemented the government's 20% cost of living fares reduction across all forms of PSO public transport services in early 2022, in addition to the previously announced Young Adult Card Scheme, offering young people a 50% reduction on equivalent Adult fares.

Fares on PSO public transport services remained unchanged in 2023, with the continuation of the government's 20% cost of living fares reduction committed to remain in place during 2024. An extension of the eligibility of the Young Adult Leap Card Scheme was also announced, to include those aged up to 25.

Bus services

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

fell by 45.6% in 2020 but maintained their share of overall PSO passenger revenue. Among the three modes of transport, bus services were the only ones to see an increase in passenger revenue in 2021, with a 4.4% rise to €197.2 million. This growth continued in 2022 with a significant 27.7% increase, bringing revenues to €251.8 million. In 2023, bus passenger revenue further increased by 8.2% to €272.4 million, reflecting ongoing recovery and growth in this sector.

Typically, just over two thirds of total bus passenger revenues are generated by bus services in Dublin city, peaking at €247 million in 2019 before receding to €130.1 million in 2020 and recovering to €170.4 million in 2022. In 2023, passenger revenue on Dublin city bus services increased by a further 5.8% up to €180.3 million, bringing it up to 79% of 2019 peak levels. Significant revenue growth occurred in 2018 and 2019 associated with the tendering of bus services and subsequently since 2021 via the introduction of enhanced services as part of the Bus Connects programme.

Passenger revenues for bus services outside Dublin peaked in 2019, resulting in a revenue total of €67.2 million for the year. This was despite the full roll out of Leap-enabled machines across the network providing lower leap fares and reflected strong passenger growth, particularly in the regional cities and on national stage carriage services. In line with other services, bus revenues outside of Dublin declined by 39.2% in 2020 to €40.9 million as a result of the impact of the pandemic. However, bus services in regional cities showed the strongest return to growth across all PSO services in 2021 with fare revenue rising by an average of 14%, followed by a year-on-year increase of 26.5% in 2022 reaching €56.9 million. 2023 saw further increases on fare revenue by an average of 12% up to €63.7 million.

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

passenger revenues and resulting in year-on-year increase of 36.4% (€4.4 million). This trend continued in 2023 following the implementation of the 2nd phase of Connecting Ireland, with a notable increase of 44% up to €6.4 million.

Light rail services

Passenger revenues on Luas light rail services grew moderately from 2013 onwards, following the economic downturn, averaging 4.3% annually. 2016 was an exception due to the closure of the red Luas line from Jervis to the Point for six weeks to facilitate Luas Cross City works and 12 days of industrial action when no services operated. However, a combination of growth in passenger journeys and moderate fare increases resulted in strong revenue growth from 2017 to 2019, with passenger revenue peaking at €81.0 million in 2019, which was largely supported by the opening of Luas Cross City and improved capacity from extended trams. Luas fare revenue was severely impacted by the COVID-19 pandemic, dropping by 58.6% in 2020 and declining a further 1.9% in 2021 due to significantly reduced passenger numbers during extended periods of strict public health restrictions. However, 2022 marked a strong recovery with a 47.2% increase in passenger revenues, reaching €48.4 million. This growth continued in 2023, with revenues rising by 17.1% to €56.7 million, representing the highest growth rate across all modes of transport in the Dublin region.

Rail services

Passenger revenue on rail services operated by Iarnród Éireann typically account for just over a third of total fare revenue on PSO services nationally. Following a period of relative decline as a result of the economic downturn, passenger fare revenue grew at a rate of 5.8% on average between 2013 and 2019, where total revenue increased to a high of €233.8 million. Rail services were significantly impacted during the pandemic, particularly from a dramatic fall in commuter patronage and the introduction of hybrid working practices, resulting in revenues falling to €100.1 million in 2021. However, 2022 saw the largest upturn in passenger revenues across all modes, with a 66.4% increase driven by significant growth in both Intercity and commuter travel. This upward trend continued in 2023, with passenger revenue on rail services rising by 15.1% to €191.6 million.

Table 4A: Annual passenger revenue (millions)

Year / Operator	Total PSO Bus Services	Total PSO Rail Services	Total Light Rail Services	Total
2010	€223.4	€162.6	€40.4	€426.4
2011	€221.5	€156.7	€43.7	€421.8
2012	€240.7	€157.9	€46.4	€445.1
2013	€256.5	€166.9	€47.9	€471.3
2014	€270.3	€174.5	€51.2	€496.0
2015	€284.5	€184.2	€54.4	€523.0
2016	€298.3	€193.7	€54.8	€546.8
2017	€307.2	€204.9	€62.0	€574.1
2018	€325.4	€220.9	€73.4	€619.6
2019	€347.0	€233.8	€81.0	€661.8
2020	€188.9	€101.6	€33.5	€324.0
2021	€197.2	€100.1	€32.9	€330.2
2022	€251.8	€166.5	€48.4	€466.7
2023	€272.4	€191.6	€56.7	€520.7

**Figures include cash fares, plus contracted revenue collected.*

Table 4B: Annual passenger revenue (% change)

Year / Operator	PSO Bus Services	PSO Rail Services	Light Rail Services	Total
2011	-0.8%	-3.7%	8.0%	-1.1%
2012	8.7%	0.8%	6.4%	5.5%
2013	6.6%	5.7%	3.1%	5.9%
2014	5.4%	4.6%	6.8%	5.2%
2015	5.2%	5.5%	6.3%	5.4%
2016	4.9%	5.2%	0.8%	4.6%
2017	3.0%	5.8%	13.1%	5.0%
2018	5.9%	7.8%	18.4%	7.9%
2019	6.6%	5.8%	10.4%	6.8%
2020	-45.6%	-56.5%	-58.6%	-51.0%
2021	4.4%	-1.5%	-1.9%	1.9%
2022	27.7%	66.4%	47.2%	41.4%
2023	8.2%	15.1%	17.1%	11.6%

Figure 4.1: Annual Passenger Revenues 2010 - 2023 (millions)

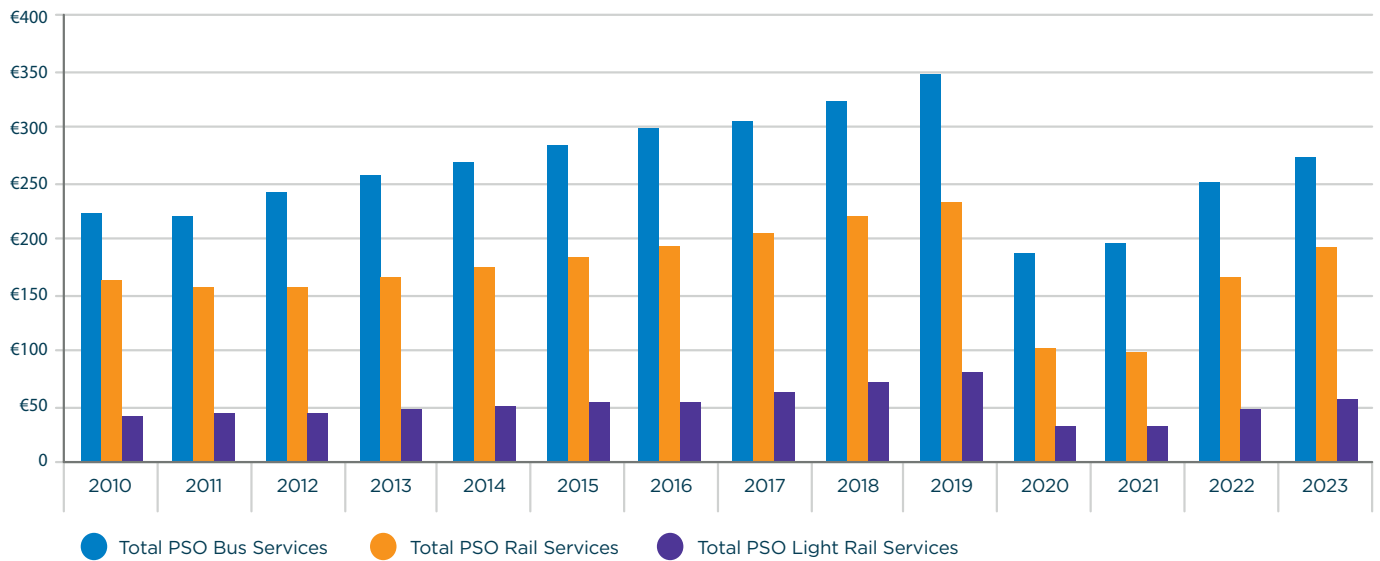


Figure 4.1 shows the annual passenger revenues for each of the public transport modes between 2010 and 2023. In overall terms, in the period up to 2016 PSO passenger revenues grew by an average of 4.3% each year across all modes. In the three years to 2019, however, this accelerated to 6.6%, coinciding with record growth in patronage. If this chart is compared with Figure 1.1 which showed passenger journeys by mode, it can be noted that while bus services nationally carry almost three times the number of passenger journeys compared to rail services, their passenger revenues are more closely aligned. This is because passenger journeys on rail are often over longer distances and the fare charged is greater than the fare charged on bus

where in general terms, passengers are carried a much shorter distance. Similarly with light rail services, while Luas typically carries similar levels of passengers to that of heavy rail services, their revenues are comparatively lower than the other modes as journeys are a lot shorter and therefore have lower fares. As previously discussed, the pandemic in 2020 resulted in significant revenue decline across all modes, with an average reduction of 51.2% nationally. 2021 saw a stabilisation of revenues prior to a significant return to growth in 2022, with an average revenue gain of 41.4% across all modes compared to the previous year. Further growth in 2023 was recorded with average revenue gains of 11.6% compared to the previous year.





5. Passenger revenues by region

Table 5A, 5B and Figure 5.1 shows the passenger revenue from 2013 to 2023 for the Dublin region and change experienced over the past 10 years. Dublin city bus services (incorporating services operated by Dublin Bus and Go Ahead Ireland) operate within Dublin City & County, while Dublin Commuter bus services (operated by Bus Éireann and Go Ahead Ireland) also serving Dublin, are included. Also included are rail services operated on Dublin Commuter routes, Dart services, as well as light rail services operated within Dublin City only. Passenger revenues on rail services are not broken down by Iarnród Éireann for the Dublin region and therefore the figures used in tables 5A and 5B are estimates only.

Total passenger revenues in this region grew steadily between 2013 and 2019 by an average of 5.7% annually across all modes, to a peak in excess of €451.7 million in 2019. This was on the

back of record growth in patronage prior to 2020 when overall revenues receded to €219.8 million. 2021 saw a further decline of €4.9m as commuters were advised to work from home for a large portion of the year. 2022 saw a resurgence in overall revenues in the region as the use of public transport returned to pre covid levels by the end of the year, with an increase of 34% to €291.1 million. 2023 saw a further increase in passenger revenue within the Dublin region, with a year-on-year increase of 10% to €319.4 million.

Leading this growth in 2023, has been Dublin commuter rail/DART and Luas light rail services, with annual increases of 15.5% and 17.1% respectively. Dublin city bus services experienced a significant growth in revenues of 25.2% in 2022, and the growth for 2023 has continued with an annual increase of just under €10 million.

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

Year/ Operator	Dublin City Bus Services	Dublin Commuter Bus Services ¹	Dublin Commuter & Dart Rail Services*	Luas Light Rail Services	Total Passenger Revenue
2013	€184.9	€26.9	€64.2	€47.9	€323.8
2014	€194.4	€28.1	€68.8	€51.2	€342.5
2015	€204.4	€29.6	€73.6	€54.4	€362.0
2016	€211.7	€31.5	€80.9	€54.8	€379.0
2017	€224.7	€29.2	€85.2	€62.0	€401.1
2018	€234.5	€27.6	€90.7	€73.4	€426.2
2019	€247.5	€29.8	€93.3	€81.0	€451.7
2020	€130.1	€18.1	€38.1	€33.5	€219.8
2021	€136.2	€15.4	€32.8	€32.9	€217.3
2022	€170.4	€21.8	€50.5	€48.4	€291.1
2023	€180.3	€24.1	€58.3	€56.7	€319.4

*Estimated

¹Dublin Commuter Bus Services consists of DCOM routes operated by Go Ahead Ireland, ECC routes operated by Bus Éireann and Dublin Commuter routes operated by Bus Éireann under the Bus Éireann Direct Award contract.

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

Year/ Operator	Dublin City Bus Services	Dublin Commuter Bus Services	Dublin Commuter & Dart Rail Services*	Luas Light Rail Services	Total Change
2013 to 2019	33.9%	10.9%	45.3%	69.2%	39.5%
2019 to 2023	-27.2%	-19.1%	-37.5%	-30.1%	-29.3%

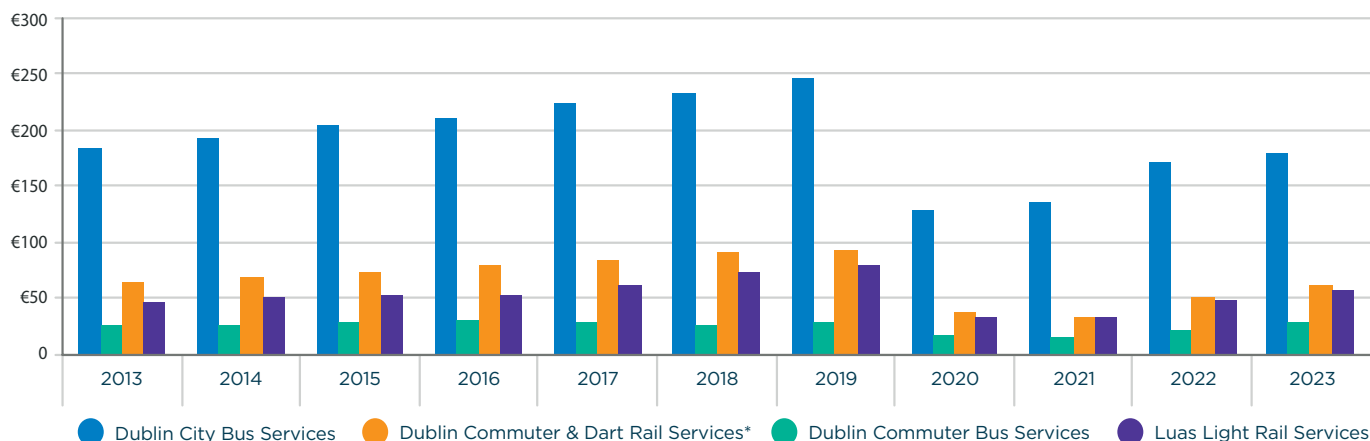
*Estimated

Table 5b shows the total change in passenger revenues in the Dublin region between 2013 and 2019 as well as from 2019 to 2023. The change witnessed between 2013 and 2019 helps put the impact of the COVID-19 global pandemic into context, where an increase of 39.5% in revenue was experienced, and despite a further strong return to growth in 2023, passenger revenues remain €4.5 million less than that seen in 2013.

the decline experienced in 2020 and continued impact of the pandemic on fare revenues in 2021. Passenger fare revenues in 2022 continued to increase, whilst further gains were made in 2023 despite the 20% cost of living fares reduction and Young Adult fares remaining in place throughout 2023 having been introduced initially in 2022. The dominance of bus services in the Dublin region remains consistent with previous years, with revenues greater than the other modes combined.

Figure 5.1 shows the revenue trends per mode in the Dublin region and in particular the extent of

Figure 5.1 Dublin Region Annual Passenger Revenues (millions)



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

equated to just under two thirds of that generated in Dublin city. The largest contributor to overall passenger revenue continues to be Intercity rail, with 67% of revenue outside of Dublin (€129.7m) arising from this sector.

Passenger revenues from outside the Dublin region in 2023 totalled €193.4 million. Whilst this figure represents a fall of just under €10 million compared to 2019, it has increased by €22.7 million year on year, and for the third year in a row. Passenger revenues outside of Dublin

Bus services in the regional cities experienced strong revenue growth between 2013 and 2019, with average increases of 8.3%. This was largely due to the introduction of enhanced timetables by the Authority, combined with increasingly strong passenger journey growth throughout the network. Following the worst of the pandemic, in 2021 regional city bus services experienced the most pronounced return to revenue growth of

all PSO services, with average increases of 14.1%, followed by average increase of 26.5% in 2022. Revenues have continued to improve in 2023 with year-on-year growth averaging 7.3%, with

even greater gains on national bus and rural bus services, demonstrating a significant growth in patronage on bus services across the country in the last year.

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

Year/ Operator	Bus Services Cork	Bus Services Galway	Bus Services Limerick	Bus Services Waterford City	National Bus Services	Intercity Rail Services	Rural Bus Services	Total
2013	€16.1	€5.1	€3.6	€1.0	€16.9	€100.6	€2.2	€145.3
2014	€18.2	€5.8	€3.9	€1.0	€16.9	€103.2	€2.0	€151.0
2015	€20.4	€5.9	€4.0	€1.0	€16.8	€107.8	€2.3	€158.3
2016	€22.7	€6.6	€4.3	€1.0	€18.0	€109.7	€2.4	€164.8
2017	€21.7	€6.7	€4.8	€1.0	€17.0	€116.4	€1.9	€169.5
2018	€22.6	€7.5	€5.4	€1.1	€21.2	€126.7	€3.4	€187.9
2019	€25.6	€8.5	€5.7	€1.4	€22.6	€136.1	€3.3	€203.3
2020	€14.6	€5.1	€3.9	€0.8	€13.4	€61.6	€3.0	€102.5
2021	€16.0	€6.0	€4.6	€0.9	€13.1	€65.8	€3.3	€109.6
2022	€19.8	€7.7	€5.7	€1.1	€18.0	€113.8	€4.4	€170.7
2023	€20.9	€8.4	€6.0	€1.2	€20.8	€129.7	€6.4	€193.4

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

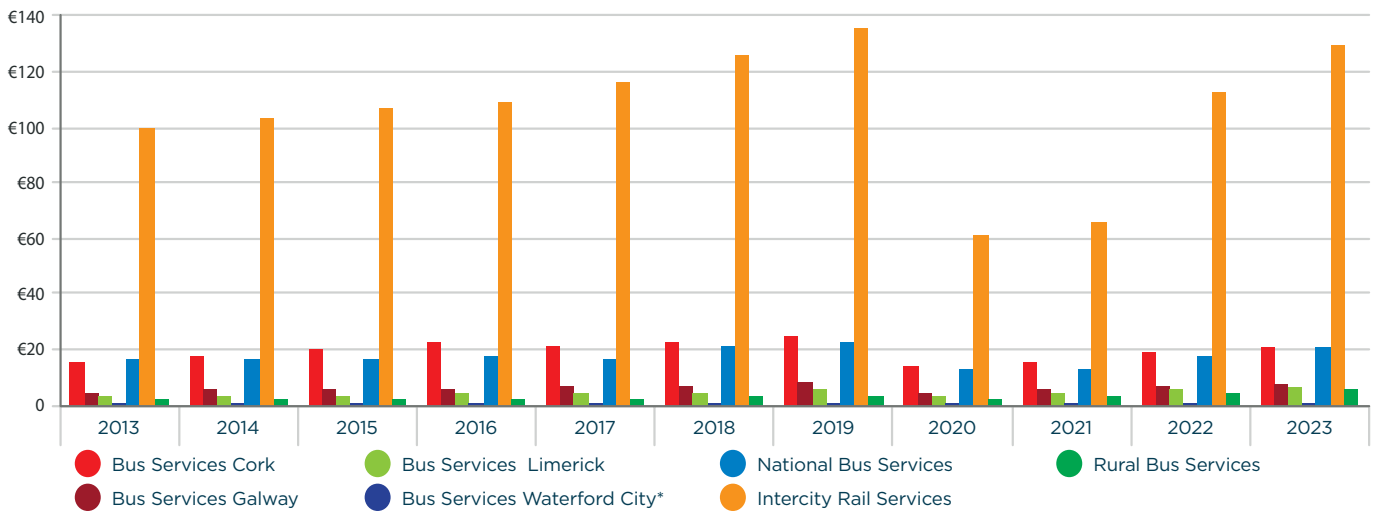
Year/ Operator	Bus Services Cork	Bus Services Galway	Bus Services Limerick	Bus Services Waterford City	National Bus Services	Intercity Rail Services	Rural Bus Services	Total
2013 to 2019	59.7%	68.1%	59.2%	49.3%	33.3%	35.3%	52.3%	39.9%
2019 to 2023	-18.6%	-1.7%	6.0%	-14.6%	-8.1%	-4.7%	94.1%	-4.9%

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

rural bus network, and the positive impact of the tendering of services to support passenger growth.

These improvements have in part expedited a return to pre pandemic use of public transport in 2021 (with a 7.1% increase across all modes). In 2022, growth in passenger revenue resulted in an annual increase of 55.7%. Whilst in 2023, further increases in passenger revenue has brought total revenue across all modes outside Dublin back to 95% of peak 2019 levels.

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



Figures 5.1 and 5.2 show that despite the declines seen since 2020, Dublin city bus services account for the largest portion of passenger revenues in the Dublin region, while revenues on Intercity rail services account for the highest revenues outside the Dublin region (approximately 72% of Dublin city bus revenue). However, Dublin city bus services

typically carry approximately 13 times more passenger journeys than that of Intercity rail. This is reflective of passengers on bus services in Dublin city taking short journeys and paying a relatively small fare, while passengers on Intercity rail services are taking much longer journeys on average and therefore paying a higher fare.

Figure 5.3 Passenger Revenue Change by Market Segment 2013 to 2023

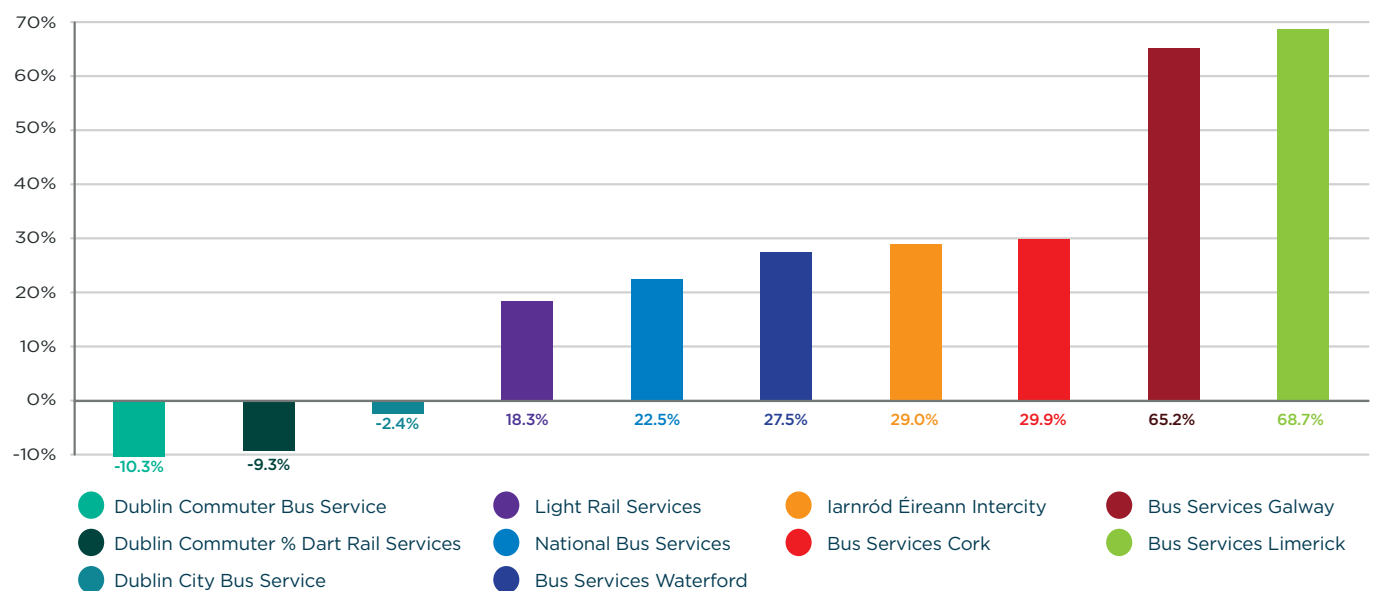


Figure 5.3 shows the passenger revenue change by market segment between 2013 and 2023. To put this chart into context in light of the impact of the COVID-19 pandemic on public transport services, the same comparisons when made between 2013 and 2019 show passenger revenues having increased by 49.3%. As a direct result of passenger numbers decreasing significantly in 2020 and 2021, the revenue outturn when compared to 2013 shows an average upturn of 23.9% across all market segments

nationally, despite patronage having surpassed pre pandemic levels by the end of 2023. The position has improved significantly from 2020, when passenger revenue across all sectors were -21.1% lower.

The regional cities continued to perform strongly in 2023, building on a strong return to growth in passenger numbers, with Limerick and Galway in particular returning in excess of 60% ahead in terms of passenger revenues over the ten-year period.



6. Free Travel Scheme revenue

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

Free travel under the Free Travel Scheme is available on most public transport services including PSO bus, rail and light rail services and some ferry services. It is also available on a large number of licensed public bus services operated on a commercial basis. The DSP spends in the region of €76 million on the scheme each year on PSO services. Funding for the scheme for PSO operators has remained relatively stable since 2010 and has not responded to the significant increase in passenger journeys undertaken by Free Travel

Scheme passengers and the significant growth in the population of those over 66 years of age. Free Travel Scheme funding for PSO operators has increased marginally by €6.3 million since 2010, with €56.9 million provided to NTA for PSO services operators in 2023.

Table 6A shows annual DSP payments for the Free Travel Scheme. The differences in revenue in Table 6A from 2010 to 2018 largely reflects timing differences, although in some cases deductions have been made from the payments when services did not operate due to industrial action. Payments to the scheme between 2019 and 2023 include that paid for operators of competitively tendered services, with the final calculation methodology yet to be confirmed with DSP.

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

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

Year / Operator	Total PSO Bus Services	Total PSO Rail Services	Total Light Rail Services	Total
2010	€33.1	€14.6	€3.0	€50.6
2011	€32.9	€14.6	€4.1	€51.6
2012	€34.2	€14.6	€3.8	€52.6
2013	€34.0	€14.6	€3.4	€52.0
2014	€34.1	€14.5	€3.9	€52.5
2015	€34.1	€14.6	€3.9	€52.7
2016	€34.9	€14.6	€3.9	€53.4
2017	€34.7	€14.6	€3.9	€53.2
2018	€35.5	€14.6	€3.6	€53.7
2019	€40.0	€16.8	€3.9	€60.8
2020	€37.8	€14.4	€3.9	€56.2
2021	€37.2	€14.4	€3.9	€55.5
2022	€38.5	€14.4	€3.9	€56.8
2023	€38.6	€14.4	€3.9	€56.9

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

Year / Operator	Total PSO Bus Services	Total PSO Rail Services	Total Light Rail Services	Total Change
2010 to 2023	18.7%	28.9%	63.2%	22.3%

In recent years the number of people aged 66 years and over has increased by about 3% to 3.5% each year. This increase is reflected in the growing numbers who have availed of the Free Travel Scheme up to 2019, shown in table 6B. In the period between 2010 and 2019, the number of passenger journeys taken under the Free Travel Scheme increased by 41.3% across all modes. The

pandemic in 2020 resulted in a dramatic fall in the use of public transport services across the state, with a similar decline in demand seen for free travel. This result in 26.1 million fewer users in 2020, before stabilising marginally in 2021 and increasing significantly in 2022. Total journeys remain 7.9 million lower than the peak in 2019, however, growth has continued in 2023.

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

Year / Operator	Total PSO Bus Services	Total PSO Rail Services	Total Light Rail Services
2010	€1.05	€3.71	€1.33
2011	€1.04	€3.49	€1.31
2012	€1.04	€3.22	€1.22
2013	€1.04	€3.22	€0.98
2014	€1.00	€3.13	€1.09
2015	€1.00	€3.16	€1.01
2016	€0.96	€3.07	€1.11
2017	€0.89	€3.00	€1.07
2018	€0.88	€2.95	€0.90
2019	€0.91	€3.31	€0.81
2020	€1.62	€9.45	€1.98
2021	€1.44	€13.32	€1.93
2022	€1.15	€3.62	€1.08
2023	€1.03	€2.83	€1.08

Table 6D shows the average payment per journey taken under the Free Travel Scheme. What we can see in the period up to 2019 across all modes, is that journeys on the scheme have increased while the level of payment has remained relatively flat. As payments to transport operators have

increased only marginally in recent years, the falloff in demand due to the pandemic resulted in average payments per passenger appearing artificially high, however these have largely returned to longer term averages as the use of public transport increased once again in 2023.





7. Public Service Obligation (PSO) subsidy

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

The majority of PSO funding goes to Dublin Bus, Bus Éireann and Iarnród Éireann - the C.I.É. operators. Contracts with the two bus companies were renewed in December 2014 and again in December 2019 for a further 5 years. The Authority has also entered into another 10 year direct award contract with Iarnród Éireann in 2019, as it is statutorily required to do. These new

direct award contracts provided for the transition from net cost contracts to gross cost contracts in 2021. This brought these contracts into line with the Authority's competitively tendered contracts. The cost of providing these services are fixed and all fare revenue is transferred to the Authority. PSO payments are then made to the operators to cover the full cost of the operation of the service. Under EU regulation 1370/2007 operators directly awarded public transport contracts are allowed to earn reasonable profit but any higher level of profit is deducted from their annual subsidy payments.

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

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

Table 7A:

Operator	Routes operated
Andrew Wharton Coach Hire	Route 975 between Cavan and Longford
Moorhill Capital Ltd	Route 310 in Limerick
Finnegan Bray Ltd	Routes 143 & 144
Bus Éireann	Routes W1, W2, W3, W4 & W5 in Waterford City
Bus Éireann	East Coast Commuter Routes 101, 101X, 131 & 133
Bus Éireann	Routes CW1 & CW2 in Carlow Town
City Direct	Routes KK1 / KK2 in Kilkenny City
Go-Ahead Ireland	25 urban routes in Dublin
Go-Ahead Ireland	5 regional routes in Kildare
Go-Ahead Ireland	Route 197 between Swords and Ashbourne
Go-Ahead Ireland	Routes W4, W61 & W62 between Dublin and Kildare
JJ Kavanagh & Sons	Route 139 between Naas and Blanchardstown

Rural transport services provided by operators under the Local Link brand are also funded by the Authority. Significant change in the delivery structure for these services took place in recent years, and additional funding has been provided

for new or improved rural transport services. There are now 15 Local Link offices with the role of managing the programme on behalf of the NTA at local level.

Table 7B: PSO Subsidy Payments (€ millions)

Year	Iarnród Éireann	Dublin Bus	Bus Éireann	Local Link	Luas Light Rail	Other Operators*	Total PSO	Total PSO % Change
2010	€155.1	€75.8	€45.2	€11.0	€0.0	€0.0	€287.2	-8.6%
2011	€148.7	€73.0	€43.4	€10.6	€0.0	€0.0	€275.8	-4.0%
2012	€166.4	€74.8	€36.9	€9.8	€0.0	€0.0	€287.8	4.4%
2013	€127.0	€64.5	€34.4	€9.6	€0.0	€0.0	€235.6	-18.1%
2014	€117.4	€60.0	€34.4	€10.1	€0.0	€0.2	€222.1	-5.7%
2015	€98.1	€57.7	€33.7	€10.7	€0.0	€0.3	€200.5	-9.7%
2016	€133.1	€59.6	€40.8	€11.9	€0.0	€0.3	€245.6	22.5%
2017	€147.0	€54.0	€52.2	€13.7	€6.7	€0.3	€273.9	11.5%
2018	€141.3	€47.5	€54.3	€18.6	€0.0	€5.9	€267.5	-2.3%
2019	€128.4	€53.5	€66.4	€22.0	€0.0	€20.1	€290.5	8.6%
2020	€239.3	€133.4	€101.1	€24.6	€30.2	€35.7	€564.3	94.3%
2021	€210.2	€146.0	€66.6	€25.3	€32.2	€33.1	€513.3	-9.0%
2022	€225.6	€147.5	€115.0	€32.2	€24.5	€30.4	€575.1	12.0%
2023	€187.2	€144.3	€82.1	€43.4	€28.5	€42.2	€527.7	-8.3%

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

**Iarnród Éireann received additional exchequer funds for their Infrastructure Management business which partly compensated them for a reduction in PSO subsidy payments to their Railway Undertaking business which receives the PSO subsidy payments.

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

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

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

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

substantial. The vast decline in passenger journeys across the State in March 2020 resulted in considerable fare revenue losses for the Authority, which was absorbed through additional Government funded subvention to ensure services continued to operate in line with public health restrictions until capacity restrictions were lifted on 1st September 2021 (with the requirement to wear face masks on public transport remaining in place). The funding requirement for subsidised public transport services almost doubled as a consequence in 2020 compared to the previous year. Despite a slight reduction in 2021, the €513.3

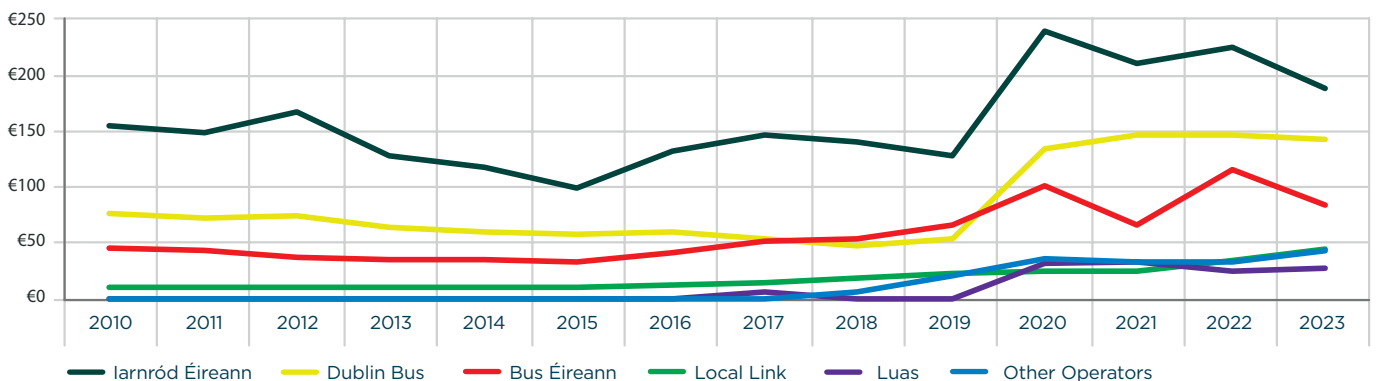
million paid to operators remained significantly higher than pre-pandemic. This trend continued in 2022, where as a result of several key factors including contract indexation costs of both existing and new services as a result of increases in the cost of living; ongoing pandemic related lockdowns arising from the omicron variant; and the introduction of key revenue diluting fares initiatives such as Young Adult fares and the 20% cost of living fares reduction all required a significant increase in state subvention. 2023 saw the continuation of the government’s 20% cost of living fares reduction committed to remain in place during 2024. An extension of the eligibility of the Young Adult Leap Card Scheme was also announced, to include those aged up to 25.

The subvention requirement for Bus Éireann PSO services reduced by the greatest extent in 2021, reflecting an encouraging return to growth in patronage as the economy emerged from the worst of the pandemic and resulting fare revenue in the regional cities and on national services. The increase seen in 2022 is largely related to the additional funding required from government as a result of the introduction of Young Adult fares in early 2022, offering young people 50% discount on equivalent Adult fares. The subvention requirement decreased in 2023 to €82.1 million representing a decrease of 28.6% from the previous year.

In 2019, for the second successive year, the PSO payment to Iarnród Éireann fell slightly to €128.4 million. This was partly a result of continued growth in passenger journeys and associated growth in passenger revenues reducing the level of their PSO subsidy. As previously alluded to, the pandemic impacted the provision of rail services most significantly, as restrictions on the use of public transport continues to alter the travel patterns of regular commuters. Resulting fare revenue losses were significant with the necessary subvention to maintain services rising by 86.4% to €239.3 million in 2020, €210.2 million in 2021, €225.6 million in 2022 and decreasing to €187.2 million in 2023, following a further resurgence in passenger and revenue growth.

Subvention paid to LocalLink in 2022 for rural services increased by 27.6% to €32.2 million due to two factors, namely provisions made as a result of the Ukrainian refugee crisis and also the continuing rollout of the Connecting Ireland programme. Subvention paid to LocalLink in 2023 continued to increase to €43.4 millions (+34.8%) as further enhancements and new services were introduced in Phase 2 of the Connecting Ireland programme.

Figure 7.1 PSO Payments 2010 to 2023 (millions)



Light rail (Luas) services operated by Transdev Dublin Light Rail Limited experienced deficits between revenue and operating costs between 2011 and 2013. In 2014 Luas operations returned a surplus of €1.94 million, which increased annually to €15.31 million in 2019 as shown in Table 7D and Figure 7.2. In 2017 TII received a once-off PSO grant of €6.68m towards Luas Cross City mobilisation costs. Luas did not receive PSO funding from the Authority in 2019, with the Authority agreeing to the balancing of

any shortfalls from accumulated cash reserves (which were used to fund the maintenance of the Luas network along with the Authority’s capital grant funds). The dramatic decline in passenger journeys and fare revenue commencing in 2020 has necessitated subvention payments to TII of €30.2 million in 2020, €32.2 million in 2021, €24.5 million in 2022 and €28.5 million in 2023 in order to maintain services in line with public health restrictions.



8. Operator Fleets

The total fleet that are owned and/or maintained by operators of all PSO services is outlined in Tables 8A, 8B and 8C. Bus numbers shown are for Quarter 4 of the respective years. Bus numbers required by Dublin Bus and Bus Éireann have increased in recent years as passenger journey numbers have recovered and as a result of the establishment of steady state funding of replacement buses in the fleet. Both the Dublin Bus and Bus Éireann fleets reduced marginally in 2019 as a result of buses being allocated to some services which were transferred to Go Ahead Ireland as a result of the tendering of services. Since that time, fleet numbers have increased due to network improvement and expansion both in Dublin through the BusConnects programme and

nationally through initiatives such as Connecting Ireland. Bus Éireann occasionally hire in additional buses to complement services on some routes but those buses are not included in the table. Also included are all buses owned or maintained in the operation of all other competitively tendered contracted bus services, as outlined at the beginning of this bulletin.

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

Table 8A: PSO Bus Fleet by Power Source – End of year 2023

Operator	Diesel	Hybrid	Hydrogen	Electric
Dublin Bus DAC	77.3%	20.6%	0.0%	2.0%
Bus Éireann DAC	87.7%	9.5%	0.5%	2.3%
Other tendered PSO Services	100.0%	0.0%	0.0%	0.0%

The Luas light rail fleet, shown below in Table 8B, consists of three types of Light Rail vehicle (LRV); those which are 40 metres in length (Citadis 401), those which have been extended to 55 metres (Citadis 402) as part of the Green Line capacity

enhancement programme in 2020 and new 55 metre trams which were purchased as part of the same capital expenditure programme for the Greater Dublin area (Citadis 502).

Table 8B: Total tram fleet - 2023

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

The national rail fleet is shown below in Table 8C. Individual train types are generally specific to a particular service, such as Intercity (Intercity Railcar or ICR), Commuter (Diesel Multiple Unit or DMU) etc., however variations of sets may be used on multiple leg journeys throughout a typical day. ICR's and DMU's are stated according to the total

number of individual sets comprising one train service, so for example, 3 ICR represents a three set ICR service. Also shown are those sets which are exclusive to a service type, namely Dublin-Cork Intercity (MKIV), Dublin to Belfast Enterprise (DD) and Dart services (EMU).

Table 8C: Total rail fleet - 2023

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





9. Age of buses

Table 9A shows trends in the average age of fleets for PSO bus services. It should be noted that Dublin Bus figures may include a very small element of vehicles used for commercial purposes from 2010 to 2015. From 2016 onwards the average age refers to Dublin Bus buses providing services included in the PSO Direct Award Contract only.

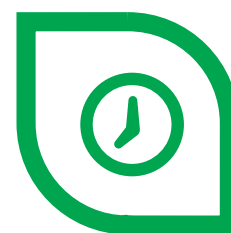
For Bus Éireann, figures for 2010 and from 2017 onwards refer to their entire PSO fleet. Figures for

“other services” between 2011 and 2016 includes stage carriage and Dublin Commuter fleet, however on occasion a commercial (Expressway) vehicle could have been used for these services. Also shown are the combined age profile for buses across all other competitively tendered contracted bus services, where depending on the contract, operators provide the buses themselves to the Authority’s specification or they are provided by the Authority for the duration of the contract.

Table 9A: Average Age of Operator’s Fleet

Year	Dublin Bus DAC	Bus Éireann DAC (City fleet)	Bus Éireann DAC (Services fleet)	Other tendered PSO Services
Quarter 4 2010	6.8 years	4.8 years (PSO fleet)	4.8 years (PSO fleet)	-
Quarter 4 2011	7.7 years	6.4 years (PSO fleet)	5.5 years	-
Quarter 4 2012	7.5 years	5.6 years (PSO fleet)	5.4 years	-
Quarter 4 2013	7.5 years	5.4 years (PSO fleet)	6.1 years	6.5
Quarter 4 2014	7.6 years	6.4 years (PSO fleet)	7.4 years	7.8
Quarter 4 2015	7.5 years	6.3 years (PSO fleet)	6.7 years	8.8
Quarter 4 2016	7.5 years	6.3 years (PSO fleet)	7.4 years	9.8
Quarter 4 2017	7.2 years	7.3 years (PSO fleet only)		6.7
Quarter 4 2018	6.9 years	6.4 years (PSO fleet only)		5.3
Quarter 4 2019	6.6 years	7.9 years (PSO fleet only)		3.5
Quarter 4 2020	6.9 years	6.9 years (PSO fleet only)		4.0
Quarter 4 2021	5.8 years	6.1 years (PSO fleet only)		4.5
Quarter 4 2022	6.3 years	5.9 years (PSO fleet only)		4.9
Quarter 4 2023	7.0 years	5.7 years (PSO fleet only)		7.0

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



10.

Major bus & rail network changes

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

Table 10A: Iarnród Éireann Network Changes

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

Table 10B: Luas Network Changes

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

Table 10C: Bus Network Changes

Network redesign phases	Date
Phase 1 - H-Spine services (North East Dublin - Malahide corridor)	Jun-21
Phase 2 - C-Spine services (West Dublin - Maynooth corridor)	Nov-21
Phase 3 - North Side Orbitals (Blanchardstown SC to Point Village & Finglas to Howth Junction)	May-22
Phase 4 - G Spine (Red Cow Luas & Liffey Valley to City centre)	Oct-22
Phase 5a - Western Orbitals (Tallaght to Blanchardstown & West Dublin to North Kildare)	Jun-23
Phase 5b - Southern Orbital, Radial and Local routes	Nov-23



11. Wheelchair accessible fleet

With low-floor wheelchair accessible buses, access to part or all of the passenger area is direct from the bus stop apron. This enables easier access for wheelchair users and those with limited mobility. Accessing low floor buses also requires that appropriate bus stop infrastructure, for instance kerbs of a specific height, are in place.

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

The rural, regional and commuter bus services operated by Bus Éireann, Go-Ahead and other operators primarily use coaches because those services involve much longer journeys for customers. As coaches are designed to have storage facilities close to ground level with seating above that, the only way of facilitating wheelchair users is by the use of a lift. The wheelchair lifts, which raise the passenger above the steps and into the coach corridor area, are not as readily suitable for wheelchair access as low-floor buses, but they still

contribute towards the overall accessibility of the fleet. All new replacement buses purchased are accessible, although in a small number of cases, a non-accessible bus may be cascaded from their commercial fleet. It is planned that over the next number of years all Bus Éireann buses which are not accessible will be removed from the fleet.

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

While the Iarnród Éireann fleet of trains are fully wheelchair accessible internally, they require a ramp to enable access between the train and the platform. A portable ramp is used for this purpose and these are currently available at staffed stations and on board some trains or by calling Iarnród Éireann in advance of travel. Trams used on Luas light rail services are all wheelchair accessible from the platform.

Table 11A: PSO Operating Fleet that are Wheelchair Accessible

Year	Urban bus services	Non-urban bus services*			Rail Services	Light Rail Services
		Low-floor ramp	Wheelchair lift	Total accessible		
2013	100%	-	-	-	100%	100%
2014	100%	-	-	-	100%	100%
2015	100%	-	-	-	100%	100%
2016	100%	-	-	-	100%	100%
2017	100%	-	-	-	100%	100%
2018	100%	-	-	-	100%	100%
2019	100%	-	-	-	100%	100%
2020	100%	-	-	-	100%	100%
2021	100%	58%	42%	100%	100%	100%
2022	100%	66%	34%	100%	100%	100%
2023	100%	69%	31%	100%	100%	100%

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



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