

# ECONOMIC AND SOCIAL IMPACT ASSESSMENT

OCTOBER 2021

Prepared for:



Prepared by:



# ECONOMIC AND SOCIAL IMPACT ASSESSMENT

OCTOBER 2021

ECONOMIC AND SOCIAL IMPACT ASSESSMENT

PREPARED FOR BUS ÉIREANN

€578m

**TOTAL INDUSTRIAL OUTPUT**

Indirect industrial output

€155m

€267m

**TOTAL VALUE ADD**

Indirect value add impacts

€70m

>8,800

**TOTAL NUMBER OF JOBS**

Indirect jobs, contractors and suppliers

~ 6,100

€263m

**TOTAL LABOUR INCOME**

Indirect income, schools contracts and suppliers

€38m

# LETTER FROM THE CHIEF EXECUTIVE

This is the first overview of Bus Éireann’s economic and social impact. It puts data behind and captures the variety and diversity of our services, and what matters most – the positive impact on people’s lives, and to the economy, environment and Irish society.

The report finds Bus Éireann supports 8,800 jobs in Ireland, and has an economic impact assessed at almost €270 million. Two-thirds of our gross value add is outside of Dublin. Our services generate between €500 million and €1 billion in additional intangible value to our customers, enabling them to be economically and socially active.

KPMG’s work shows that through reducing car journeys, by an estimated 34 million a year, our services avoid more emissions than we currently generate, and reduce road congestion. Nearly half of our passengers surveyed rely on our services as their only travel option, and 83% agree that Bus Éireann provides an essential service to them and their family. Seventeen million trips are to work, 19 million for social/leisure purposes with seven million to third level education. Four million Bus Éireann trips a year bring people to healthcare and we have 1,130 bus stops within two kilometres of hospitals.

Nearly 70% of customers surveyed said that social impact is important to Bus Éireann. This mandate is important to us too, and that is why we maintained our services, with State support, throughout the Covid-19 pandemic.

Ultimately, the value of Bus Éireann as Ireland’s national bus company is our detailed understanding of transport needs, challenges and opportunities from Ireland’s regional cities to towns to rural areas, and at every life-stage, from primary school students to those who have retired. Our scale and scope gives us a special understanding of what moves Ireland, how to do it better, and more sustainably.

This report distils these impacts and motivates us further to become the most customer-centered and sustainable transport company in Ireland.



**Stephen Kent**  
CHIEF EXECUTIVE OFFICER

# CONTENTS

<b>Executive summary</b>	<b>1</b>
<b>Profile of Bus Éireann</b>	<b>1</b>
BUS ÉIREANN'S IMPACTS	1
PASSENGER TRENDS	3
FINANCIAL PERFORMANCE	5
ROUTE CATCHMENTS	7
EMPLOYMENT	11
<b>Economic impact</b>	<b>11</b>
BUS ÉIREANN'S ECONOMIC ACTIVITY	14
INDUSTRIAL OUTPUT	17
NATIONAL GROSS VALUE ADD (GVA)	18
CONTRIBUTION	19
BENEFITS TO USERS	23
<b>Social impact</b>	<b>25</b>
PROVIDING A LIFELINE	28
IMPORTANCE OF FLEXIBILITY	29
SCHOOL SERVICES	30
HIGHER EDUCATION	36
HEALTHCARE	37
<b>Customers' views</b>	<b>38</b>
<b>Key statistics by county</b>	<b>41</b>



Bus Éireann, founded in 1987, is Ireland’s national bus company, part of the CIÉ Group.



Bus Éireann carries almost 90 million passengers a year, and operates



City services of Cork, Galway, Limerick and Waterford

Town services of Athlone, Balbriggan, Drogheda, Dundalk, Navan, Sligo, Stagecarriage county and regional services

All services under contract to and supported by the National Transport Authority.



Bus Éireann operates 14 intercity Expressway routes, on a commercial, non-subsidised basis, and operates the School Transport Scheme on behalf of the Department of Education.



# EXECUTIVE SUMMARY

## BUS ÉIREANN'S ECONOMIC IMPACT AND SUPPLY CHAIN EXPENDITURE

Core sector

LAND TRANSPORT SERVICES

SUPPLY CHAIN EXPENDITURE



Note: Sector names above relate to CSO sector categories

# EXECUTIVE SUMMARY



# EXECUTIVE SUMMARY

## Summary of key findings.

**Buses matter.** Bus Éireann carries 89 million passenger trips a year in Ireland and the company is the backbone of public transport in Ireland's regional cities and town. This report is intended to provide a consistent and comprehensive assessment of the range of benefits Bus Éireann generates.

There are multiple, extensive and overlapping benefits of public investment in bus services. Public support for bus services generates multiple benefits. In particular it supports local economies, reduces overall road congestion, and benefits the disadvantaged. Unlike for most other forms of government funding for measures which have a social dimension, a significant proportion of benefits accrues to other road users and society at large, rather than just the users themselves.

The economic impacts of Bus Éireann are compelling. Bus Éireann contributes to Ireland's national economic output, measured as Gross Value Add (GVA), through its spend on goods and services, salaries, and investments, amongst others. Through its aggregate spend and that of its suppliers, Bus Éireann is estimated to generate over €267 million in Gross Value Add (GVA) for the Irish economy.

Additionally, Bus Éireann generates a range of non-monetary, intangible benefits for users and non-users. We estimated that €550 million - €1.0 billion in intangible value arises for users from access to jobs, training, healthcare, shopping and leisure opportunities. Other benefits accrue to other transport users and society at large, through decongestion, reduced pollution, lower accident rates, improved productivity and the stand-by value of bus networks.

Bus Éireann plays an important role in providing employment and salaries across Ireland. The company employs >2,700 staff directly, with a minimum of an additional 6,100 jobs supported in its supply chain, through schools contracts (~5,200 drivers) and other suppliers (~880). The total contribution to employment is more than 8,800. Through its own direct spend on salaries, and its payment to suppliers and contractors, Bus Éireann makes a strong contribution to labour incomes, summing to more than €264 million.

Bus Éireann's and its suppliers spend on wages and salaries generates income tax and PRSI revenue for the Exchequer. Across income tax, USC, and PRSI, the total contribution of Bus Éireann and its supply chain to the Exchequer is estimated to be close to €70 million. For each €1 paid to a Bus Éireann employee, ~€0.35 is generated directly for the Exchequer (including employer PRSI).

Bus Éireann's 17 depots across Ireland create employment opportunities in their immediate vicinity and in their wider catchment area. On average 67% of employees are resident in the county they work, leaving 34% that commute from outside the county they work in. Of the employees traveling from outside their home county, the majority are resident in adjoining counties, leading to a reasonably localised employment catchment for each depot.



# PROFILE OF BUS ÉIREANN

## BUS ÉIREANN'S IMPACTS

Through its activities, Bus Éireann contributes to a diverse range of impacts. These are explored throughout this report.

**Bus Éireann is a lifeline for many: it provides mobility options, generates jobs, spurs economic growth and supports public policies regarding energy use, air quality and carbon emissions.**

On a macro level, Bus Éireann contributes to overall economic output, employment directly and in its supply chain, the payment of labour incomes to employees and through the supply chain, and contributions to the Exchequer in the form of support for taxation.

Wider still, Bus Éireann can also help reduce traffic congestion, with broader benefits for commercial truck deliveries, employer labour market access and other aspects of business productivity.

Direct benefits for users fall into three core categories: (1) travel time savings, (2) travel cost savings, (3) reliability improvements.

All three types of benefits can provide monetary savings for both Bus Éireann's users and for travellers using use of other transportation modes.

The direct economic impact for users can include vehicle operating cost savings (including fuel use savings) and parking cost savings for those leaving their car at home. A reduction in traffic congestion due to greater public transportation use can also produce travel time savings as well as vehicle operating cost savings for road users.

A key benefit arising from Bus Éireann's activities is its role as an enabler of economic activity, in particular for individuals and communities who/that have no alternative travel options. In the absence of Bus Éireann, it is likely that a share of economic activity would not take place.

## DIRECT BENEFITS FOR USERS FALL INTO THREE CORE CATEGORIES



### ECONOMIC

- » GDP
- » Employment
- » Employer taxes
- » Income taxes
- » Local rates
- » Access to work



### USERS

- » Reliability
- » Travel time saving
- » Travel cost savings
- » Reduced use of cars
- » Lower GHG emissions



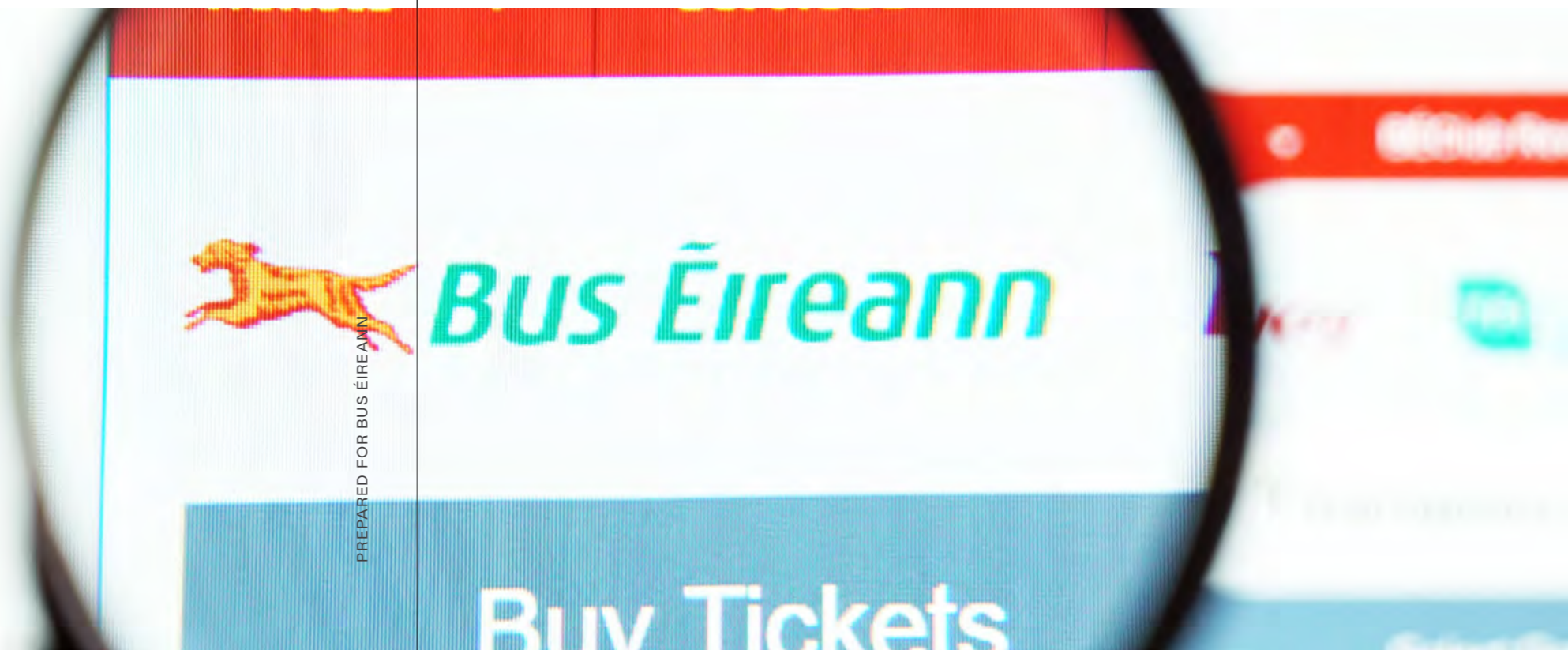
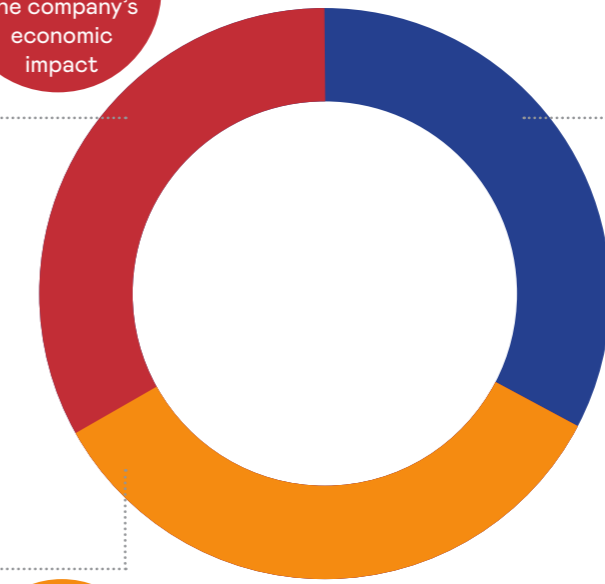
### SOCIAL

- » Friendly face
- » Rural communities
- » Accessibility
- » Access to healthcare, education
- » Support for marginalised groups

These are explored in the section on the company's economic impact

These are referred to throughout this report

These are explored in the section on the company's social impact



# PASSENGER TRENDS

## Passenger volumes were increasing at Bus Éireann pre-Covid, across all services.

A strong recovery from the last economic downturn, in the period 2013-2019, contributed to steady growth across Ireland's public transport operators, with an increase of 23% in total passenger journeys during 2013-2019.

Bus Éireann achieved a steady increase in passenger numbers, with city services and other scheduled services growing by an average of 5% per annum in 2015-2019, mainly driven by its investments in Expressway services and the introduction of a newer fleet of buses.

Additionally, significant improvements to timetables and routes has seen the increased growth in regional city services and is now approximately 30% of the total passenger volume.

Under the School Transport Scheme, Bus Éireann has been committed to

playing a major role in ensuring that children reach school safely and on time since 1967. More than 120,000 children use their services to travel to over 3,000 schools, 105,000 on school buses and 15,000 on special educational needs services. The School Transport Scheme is Bus Éireann's biggest service line – 43 million journeys in 2019 – and accounts for an average of 52% of total passenger volume over the last decade.

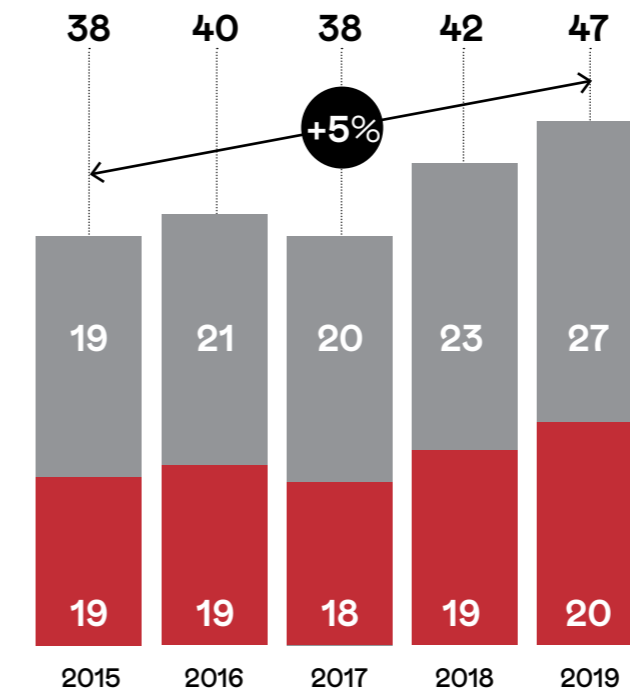
In 2020, the pandemic led to a significant fall in passenger volumes throughout the year and especially during the period of inter-county travel restrictions.

“BUS ÉIREANN ACHIEVED A STEADY INCREASE IN PASSENGER NUMBERS, WITH CITY SERVICES AND OTHER SCHEDULED SERVICES GROWING BY AN AVERAGE OF 5% PER ANNUM IN 2015-2019...”



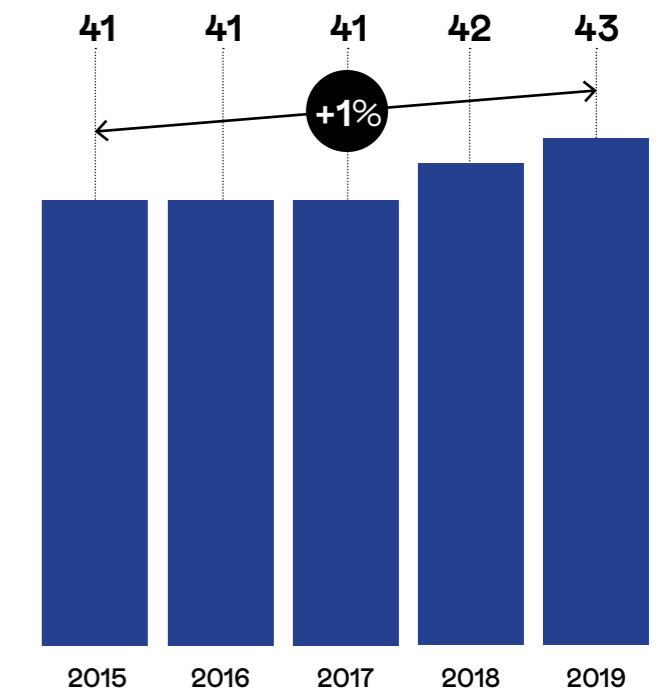
BUS ÉIREANN PASSENGER VOLUME, 2015-2019 (MILLIONS AND CAGR)

■ City Services ■ Other Scheduled



BUS ÉIREANN SCHOOL TRANSPORT VOLUME, 2015-2019 (MILLIONS)

■ Schools



# FINANCIAL PERFORMANCE

**Pre-Covid, Bus Éireann's financial performance was improving. The pandemic reduced revenue and increased costs.**

**The pandemic resulted in significant changes to consumer behaviour, a need to restrict capacity at certain periods during 2020 and 2021, and resulted in lower revenue for Bus Éireann overall.**

In 2019, Bus Éireann generated revenue of €424 million, an increase on 2018's revenue of €390 million (+7.5%). Revenue from schools services accounted for €203 million (48%) of the total, and school transport is operated on a cost recovery basis. Bus Éireann faced costs of €416 million, which rose from €381 million in 2018 (+8.5%). After exceptionals and taxes, a profit of €2.3m was generated, an improvement on 2018 (loss of €6.4m).

In its 2019 Annual Report, Bus Éireann noted that the emerging pandemic was leading to a number of challenges. These included pressure on its commercial services, schools transport, and PSO services. Across its commercial services, Bus Éireann relied on liquidity support from CIÉ and from the NTA under its Commercial Bus Operators Direct Award (awarded in 2020). Financial challenges continued into 2021, with profitability on Expressway routes expected to return in 2022.

Similarly, PSO services were operated throughout the pandemic, with Bus Éireann running a shortfall that was supported by the NTA. Bus Éireann's schools transport services operated in compliance with government guidelines during the pandemic, with capacity limited to 50% for many periods.

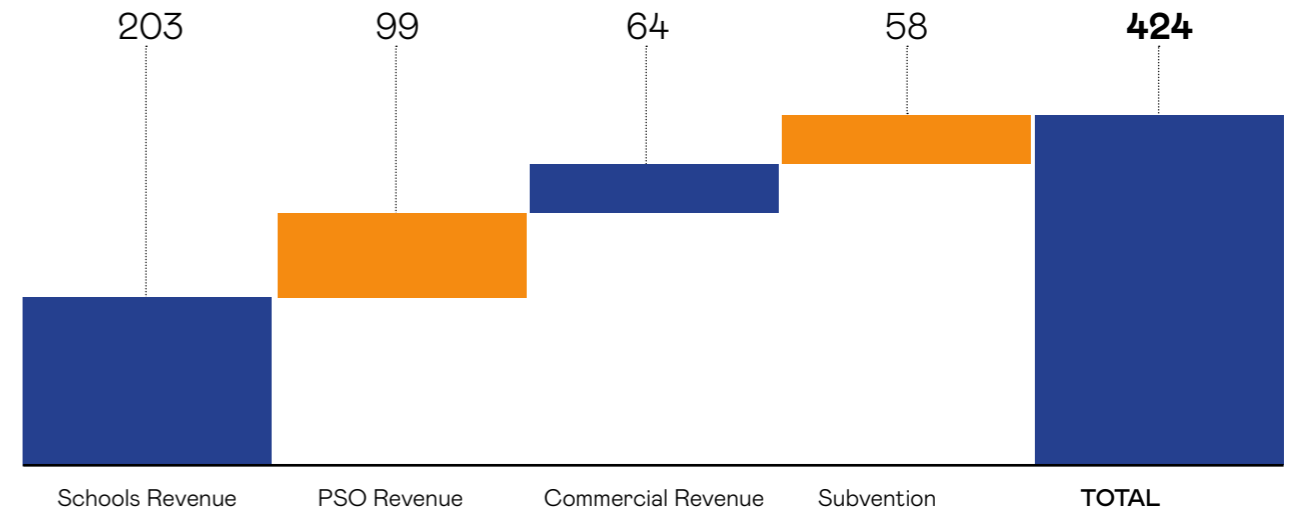
To meet this requirement, additional contractors were procured during 2020, ensuring that many thousands of students had access to schools transport services. Altogether, the firm responded well to the challenges of the pandemic, while facing significant falls to revenue and growth in costs to do so.

Reflective of the wider value that Bus Éireann generates, Department of Public Expenditure and Reform research shows that the cost per seat on a kilometre basis fell by 6% in the period 2015-19, while passenger numbers on PSO routes grew by 32%.

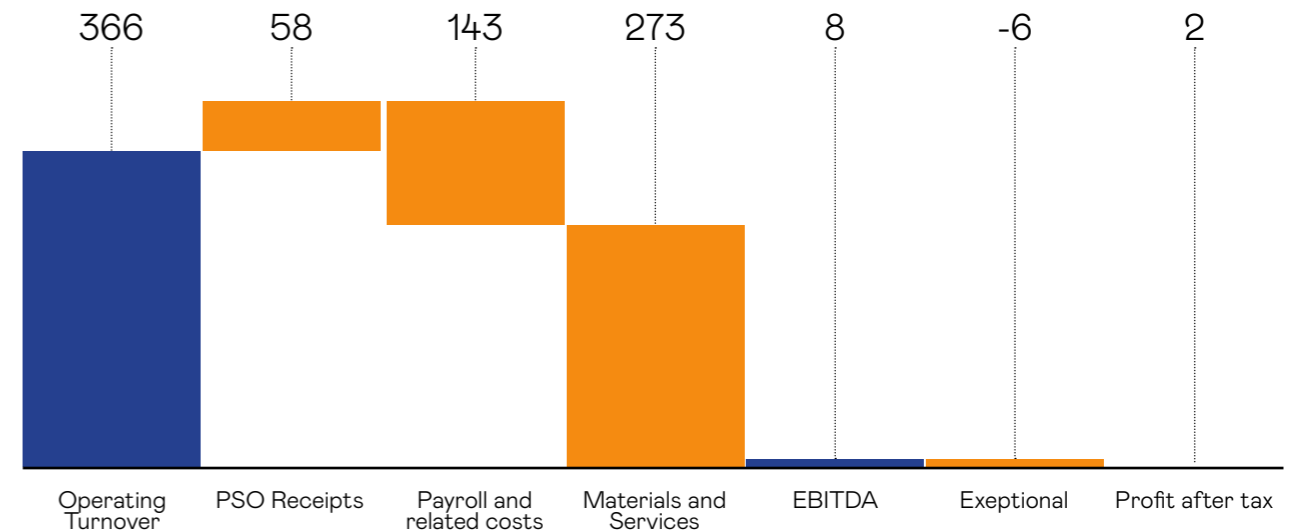


**"BUS ÉIREANN GENERATED REVENUE OF €424 MILLION, AN INCREASE ON 2018'S REVENUE OF €390 MILLION (+7.5%). REVENUE FROM SCHOOLS SERVICES ACCOUNTED FOR €203 MILLION (48%) OF THE TOTAL. BUS ÉIREANN FACED COSTS OF €416 MILLION, WHICH ROSE FROM €381 MILLION IN 2018 (+8.5%)."**

BUS ÉIREANN REVENUE SOURCES, 2019 (€M)



BUS ÉIREANN PROFIT AND LOSS ACCOUNT, 2019 (€M)





# ROUTE CATCHMENTS - 2021

Between the PSO and Expressway routes Bus Éireann provides a public transport option nationwide.

## Route Catchments

**Bus Éireann provides a diverse range of services to communities across Ireland through its Expressway and PSO services, 220 routes in total.**

On a spatial level, for routes operational in 2021, between 69% and 95% percent of the national population lives within 10km of either an Expressway or a Bus Éireann route bus stop, providing a strong level of access for communities nationwide. Meanwhile, 88% of the national population lives within 5km of a PSO route bus stop, and 50% of the national population lives within 2km of an Expressway stop.

Reflective of the nature of Expressway stops, over 3.2 million people live within 10km of all

Expressway stops with 2.1 million of these people either in work or attending school/college, with 11% stating that their primary mode of transportation is via bus.

Within a 10km catchment of all PSO stops there are over 4.4 million people, with 2.9 million of these people either in work or attending school/college. Of these 2.9 million people 10% stated their primary mode of transportation is via bus. Additionally, many of Bus Éireann's services users travel to bus stops by active transport: by foot, bike, and escooter.

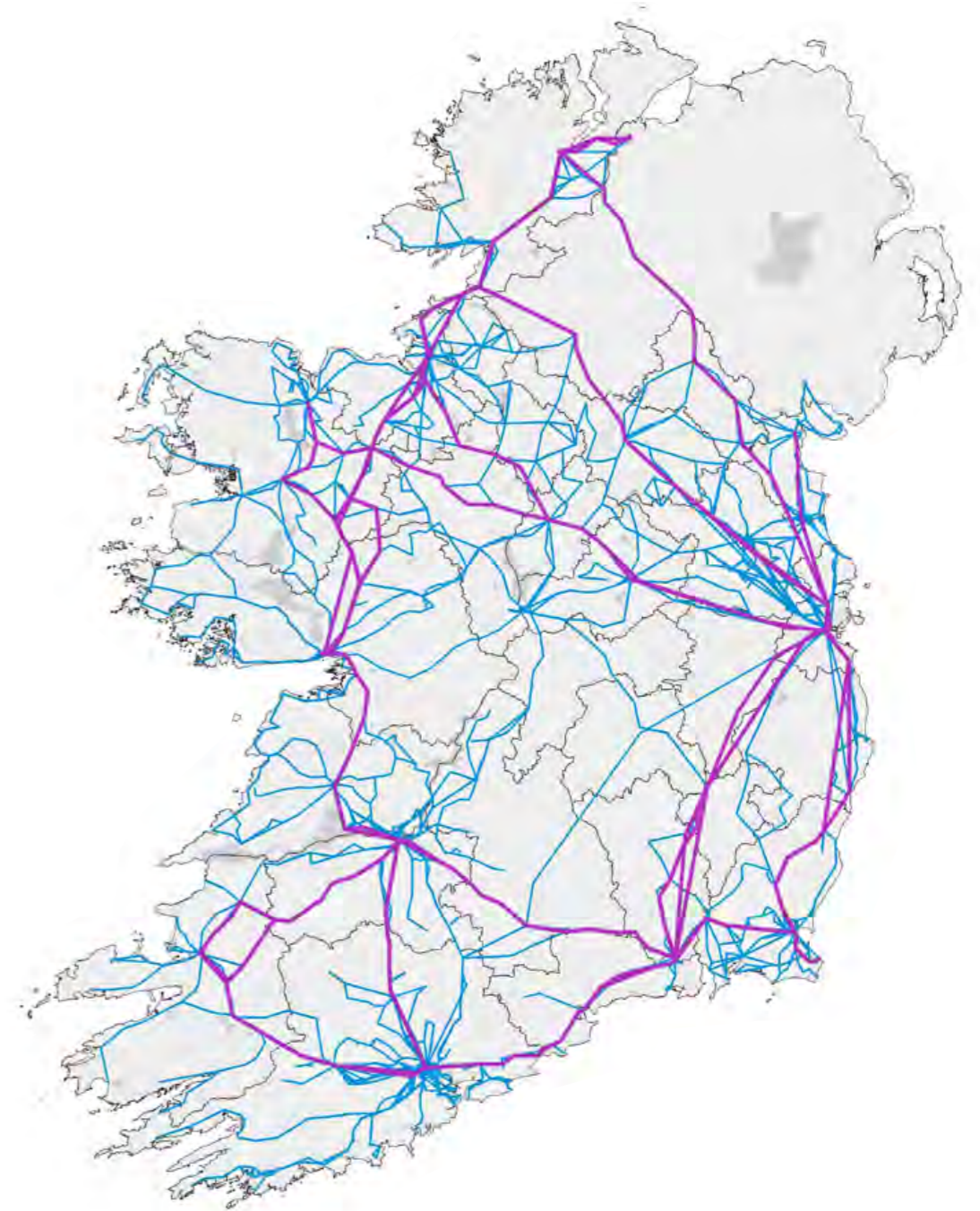
Taking these factors into account, it is clear that Bus Éireann provides a significant service offer to many communities and that accessing Expressway and PSO bus stops is convenient for the majority of the Irish population.



# EXPRESSWAY AND PSO ROUTES

## ALL ROUTES 2021

Expressway  
PSO



# SUSTAINABILITY

**Bus Éireann’s recent Sustainability Strategy sets ambitious targets for the company to become a leading climate friendly public transport operator.**

## Embedding sustainability

**Bus Éireann has recently published a Sustainability Strategy to become one of the greenest public transport operators in Europe.**

This builds on the core principle that bus and coach transport maximises the value of the State’s investment in road and motorway infrastructure by being highly flexible and demand-responsive, while reducing the need for car parking facilities and increasing public space compared to other modes of transport.

The strategy builds on a number of successes:

- In 2019, Bus Éireann grew city passenger numbers by 16% with an extra 600,000 trips in Waterford
- More than doubling frequency in Drogheda and increased frequency in Cork resulted in passenger numbers growing by 60% and 70% respectively.
- Despite growth in its fleet and activity, Bus Éireann cut CO2 emissions by 7% in 2009-2019

The strategy sets out the company’s response across a range of priorities, linked to national policies and the United Nations’ Sustainable

Development Goals and is available at [buseireann.ie/sustainability](http://buseireann.ie/sustainability).

The strategy sets out KPIs that Bus Éireann should aim to meet. The plan notes that Bus Éireann will achieve 50% reduction in greenhouse gas emissions by 2030, while growing passenger numbers. No new diesel-only bus will be added to its city and regional bus fleet after 2020. The company will invest, with the NTA, in charging and engineering infrastructure across Ireland and train employees to drive/ maintain new vehicles.

KPMG analysis finds that 12.6 million potential car journeys were substituted with bus journeys in 2019. Additionally, schools services are assumed to result in ~21.5 million car journeys being avoided.

This contribution is strengthened further when travel to bus stops is considered: over 70% of users report that they can walk to their nearest bus stop. As a result, further emissions are avoided.

SUSTAINABILITY STRATEGY CLIMATE ACTION KPIS (SELECTED)

Climate Action KPIs	2019	2030
Total CO2e emissions (thous t CO2e)	79.8	39.9
Total CO2e emissions/passenger journey (thous t CO2e)	0.89	0.45
Energy efficiency improvement indicator	14.7%	50%
Bus and coach service fleet fully electric	0%	50%
Car/van fleet fully electric	0%	100%
Diesel consumed (litres, million)	30.4	15.5



# NATIONAL AND REGIONAL EMPLOYMENT

Depots are distributed across the country to facilitate Bus Éireann's nationwide operations. Depots have wide employment catchments.

## Employment and depots

Bus Éireann operates 17 depots across Ireland, providing direct employment opportunities to more than 2,700 workers. These staff are employed as drivers, mechanics, and in office-based roles.



On a regional level, employment numbers are greatest in Cork (570), Dublin (360), and Galway (260). On average, across all depots, over two-thirds of all employees are residents of the county in which their workplace is located.

High inward commuting is observed in Athlone (73%), while low inward commuting observed in Cork (4%). Athlone experiences a high level of inward commuting due to its location on the border between Westmeath and Roscommon.

The map below illustrates the location and employment volumes of each of the 17 depots, the employment links for each depot (weighted line), and the volume of employees resident in each county. Thicker lines reflect a greater number of employees travelling from adjoining counties to their home depot for work. Hence, Bus Éireann provides employment opportunities across all counties.

# BUS ÉIREANN: NUMBER OF EMPLOYEES BY DEPOT, HOME COUNTY, AND FLOW OF EMPLOYEES TO DEPOTS

## DEPOTS

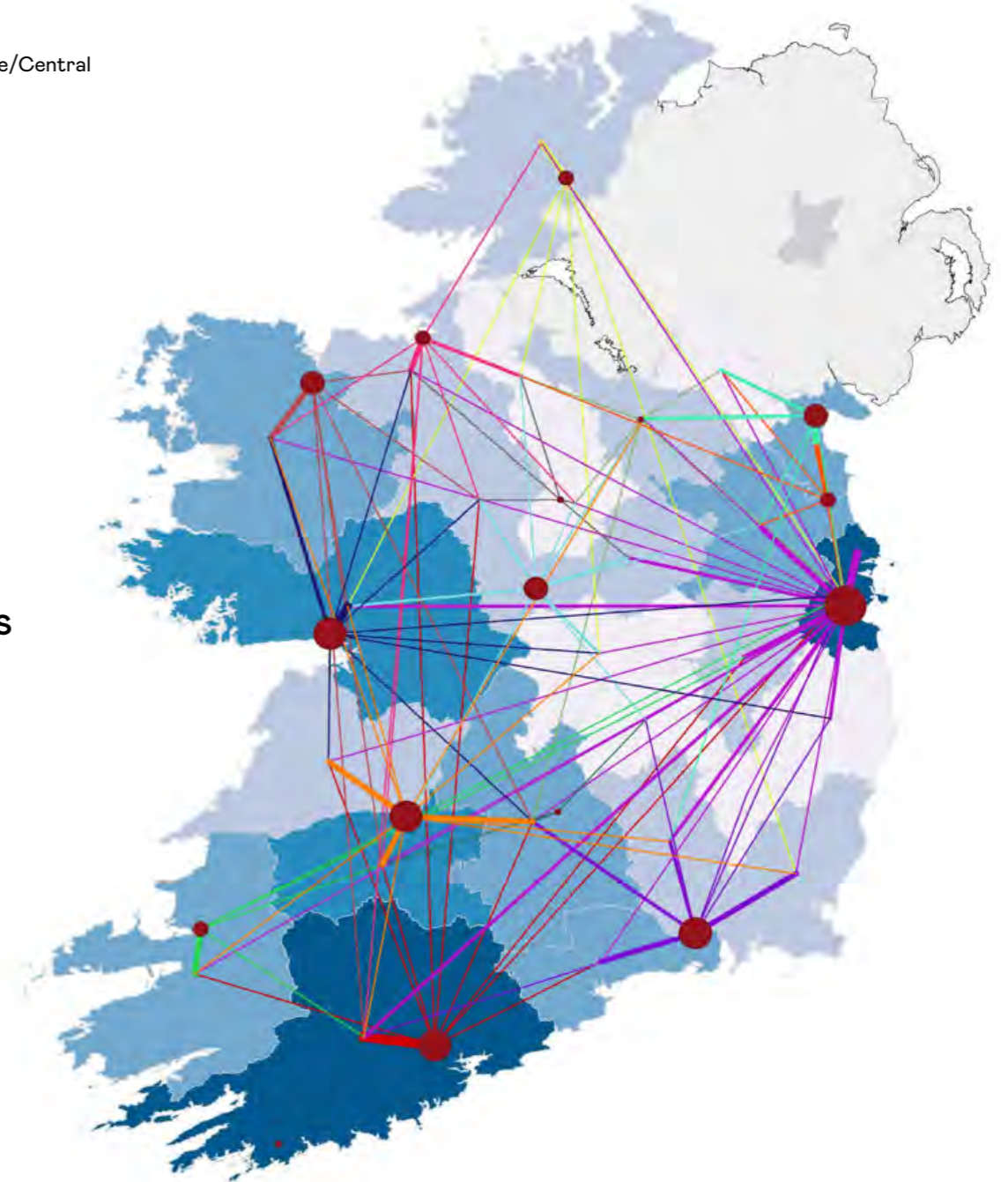
- Athlone
- Ballina
- Broadstone/Central
- Cavan
- Cork
- Drogheda
- Dundalk
- Galway
- Limerick
- Longford
- Sligo
- Stranorlar
- Thurles
- Tralee
- Waterford

## DEPOTS & EMPLOYEES

- 2-30
- 30-88
- 88-133
- 133-558
- 558-645

## EMPLOYEES PER COUNTY

- 355-567
- 154-355
- 82-154
- 44-82
- 9-44



# ECONOMIC IMPACT

## BACKGROUND: ECONOMIC IMPACT ANALYSIS

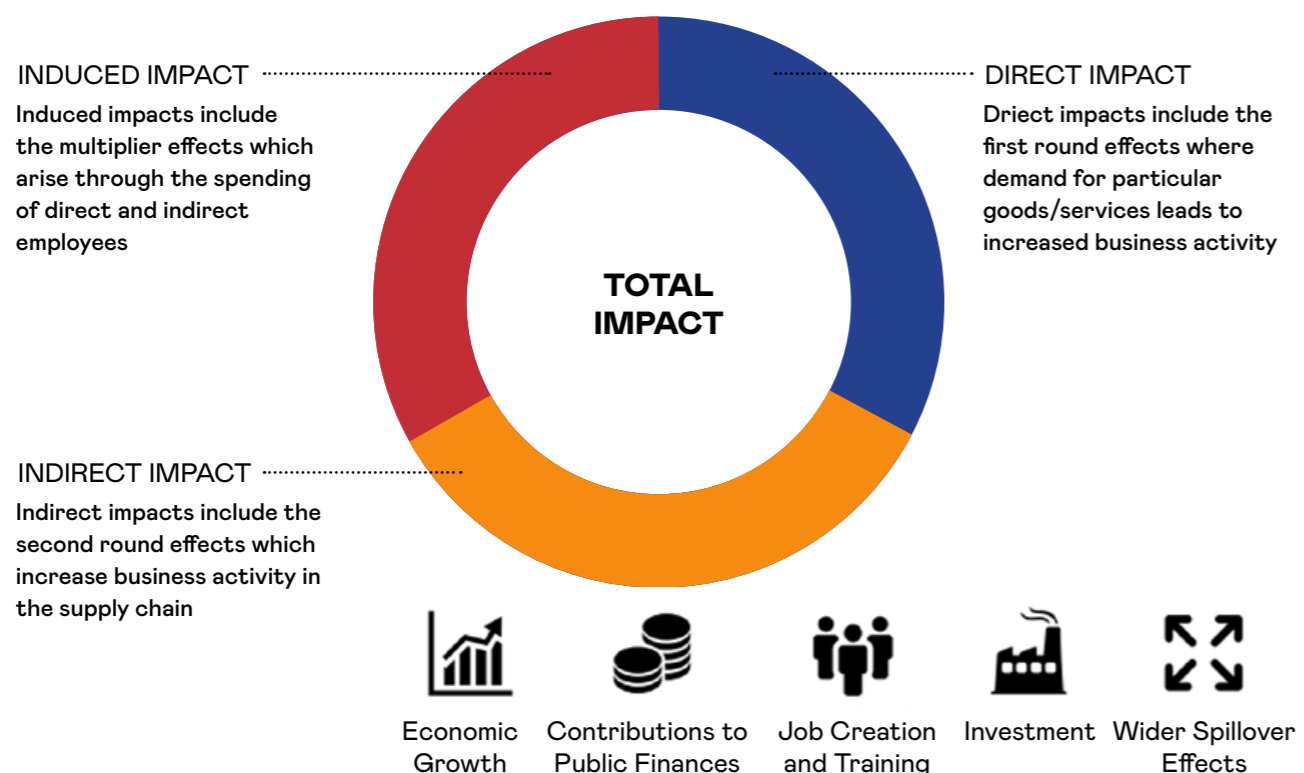
Economic impact assessments analyse a sector or an entity's impact to national economies.

### Definitions and viewpoint

Economic impact assessments consider the injection of income as a result of a specific event, policy choice or economic activity from a specific industry.

Bus Éireann's economic activities, in particular its operational expenditure, can be seen as the initial round of expenditure that creates further economic impacts.

These direct expenditures create additional rounds of expenditure that circulate through the economy, based on the specific sectors in which the expenditure occurs and on the specific inter-industry linkages with the rest of the economy.



## BUS ÉIREANN'S ECONOMIC ACTIVITY

Bus Éireann generates direct and indirect spend throughout its supply chain, contributing to overall Gross Value Add (GVA) across Ireland.

### Operational expenditure and value chain impact

For the current baseline impact of Bus Éireann, we reviewed the firm's overall spend nationally and geographically in 2019, pre Covid-19.

This expenditure is incurred to pay for goods and services provided by suppliers in the value chain. From this direct or primary expenditure, we can identify the potential direct, indirect and induced impacts across the value chain.

### Capital investment expenditure and value chain impact

Bus Éireann's ongoing programme of fleet renewal and infrastructure development is critical to the firm achieving national Climate Action Plan (CAP) targets. Bus Éireann engages closely with the National Transport Authority (NTA) and Department of Education to ensure investment is sufficient to meet service needs, and in 2019 capital expenditure amounted to ~€16 million, funded through NTA capital funding for PSO services.

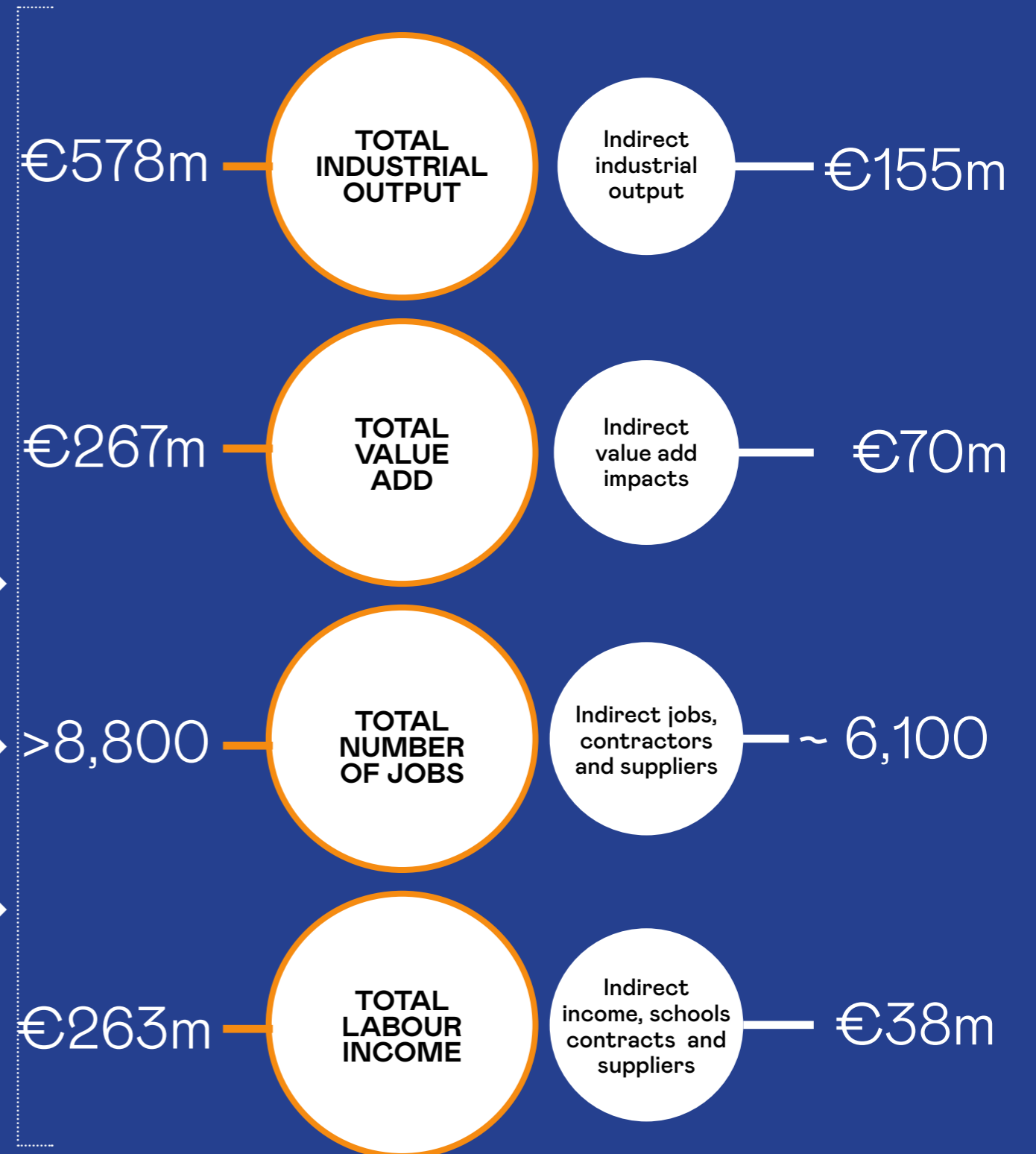


# BUS ÉIREANN'S ECONOMIC IMPACT AND SUPPLY CHAIN EXPENDITURE

Core sector  
LAND TRANSPORT SERVICES  
SUPPLY CHAIN EXPENDITURE



Note: Sector names above relate to CSO sector categories



## INDUSTRIAL OUTPUT

Through its aggregate spend and that of its suppliers, Bus Éireann contributes nearly €580 million to national industrial output.

**In impact modelling, industrial output typically refers to a firm or a sector's aggregate gross sales, which flows into national and regional economies as spend.**

In Bus Éireann's case, industrial output captures the company's spend on costs such as payroll, repairs and maintenance, bus contractors, bus hire, outside service maintenance, and fuel, amongst others. Effectively, the company's total spend contributes to direct industrial output.

Through its spend and activities, Bus Éireann adds to Ireland's industrial output on national and on regional levels, with a direct impact on industrial output in 2019 of €423 million, reflective of Bus Éireann's total contribution to overall industrial output

As a result of this spend, an additional €155 million is spent by Bus Éireann's partners and contractors to support the company with its provision of services across Ireland.

This additional spend by suppliers includes schools contractors' spend on fuel, repair and maintenance, as well as wider spend on other goods and services.

Key sectors in which Bus Éireann's total spend enables additional indirect spend include land transport services, public administration, head office spend, financial services and insurance, spend on motor vehicles, and spend on electricity and other utilities.

Altogether, through its own direct spend and the spend of its suppliers and contractors, Bus Éireann's total contribution sums to ~€580 million. This spend flows into the national economy, contributing to Ireland's economic growth and providing opportunities to many direct and indirect suppliers to grow their businesses and to create employment.

INDUSTRIAL OUTPUT	
<b>Direct impacts</b>	€423m
This captures the direct impact of spending by Bus Éireann in the economy, on contractors, payroll, and suppliers, amongst others, on an ongoing basis	+
<b>Value chain impacts</b>	€155m
This captures the impact of spending by suppliers within Bus Éireann's supply chain, including on fuel, repairs, finance, legal, and consultancy, amongst others, on an ongoing basis	+
<b>Total industrial output</b>	€578m
Together, Bus Éireann's and its supply chain's total industrial output is close to €580 million, with a multiplier of 1.37 comparing direct and value chain impacts	
<b>= Total industrial output of €578 million.</b>	

Source: KPMG impact model

## NATIONAL GROSS VALUE ADD (GVA)

Bus Éireann and its supply chain generate ~€270 million in Gross Value Add (GVA) for the Irish economy.

**Bus Éireann contributes to Ireland's national economic output, measured as Gross Value Add (GVA), through its spend on goods and services, salaries, and investments, amongst others.**

Impacts are measured on a direct level (allowing for the estimation of the direct effects of economic activity) and on indirect and induced levels (the knock-on business activity that is supported through direct economic activity).

Directly, Bus Éireann contributes €197 million to the Irish economy. This is predominantly generated by expenditure on wages and salaries, reflective of the tangible, direct impact of Bus Éireann's day-to-day spend.

Indirectly, Bus Éireann's contribution to the national economy is also strong. Through its spend in its supply chain, in particular its spend on schools bus contractors, vehicle supplies and maintenance, and utilities, amongst others, the total contribution of this spend to national economic value add indirectly is €70 million.

Altogether, total direct, indirect, and induced impacts arising from Bus Éireann's activities sums to €267 million. Key sectors to which the company makes a vital contribution include land transport (€140 million value add) and payments for pensions and related costs (€30 million value add).

VALUE ADD TO THE ECONOMY	
<b>Direct impacts</b>	€197m
This captures the direct impact of Bus Éireann's spend and refers to the company's net contribution to the Irish economy, after intermediate consumption has been accounted for	+
<b>Value chain impacts</b>	€70m
When direct capital flows into suppliers involved in Bus Éireann's supply chain, an additional €70 million is generated for the Irish economy	+
<b>Total industrial output</b>	€267m
Together, a total value add of €267 million, with a multiplier of 1.35 comparing direct and indirect impacts.	
<b>= Total economic value add from Bus Éireann's activities is ~€270 million.</b>	

Source: KPMG impact model

## REGIONAL CONTRIBUTION TO GVA

Given the spread of Bus Éireann’s activity across Ireland and the country’s size, contribution to regional economies is strong.

In addition to its national contribution to Gross Value Add (GVA), Bus Éireann makes strong contributions to GVA on regional levels. This takes the form of spend on income for drivers, mechanics, and other administrative staff, as well as spend on suppliers such as bus contractors.

The regional modelling takes into account the direct, indirect and induced impacts of the economic activity of Bus Éireann and other operators in transport services.

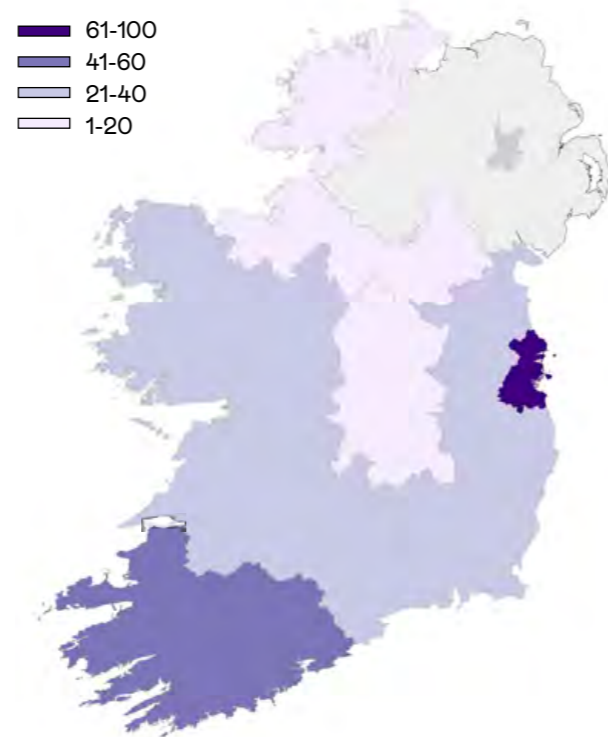
The map alongside summarises the regional contribution Bus Éireann makes directly and indirectly as a result of its operations. Regional contributions are greatest in Dublin (€96 million) and the South-West (€47 million), with similar levels of GVA generated in the South East (€25 million), West (€24 million), and Mid-West (€24 million).

Below the regional level, Bus Éireann makes a strong contribution to GVA across the larger cities and in regional towns. Schools contractors, facilities services, and other professional services support Bus Éireann across the regions. Impacts on local levels can be significant and can generate spillovers for a town’s wider economy.

DIRECT AND INDIRECT CONTRIBUTION TO REGIONAL GVA, €M

GROSS VALUE ADDED

- 61-100
- 41-60
- 21-40
- 1-20



CONTRIBUTION TO CITIES

1. Dublin: ~€96 million
2. Cork: ~€40 million
3. Waterford: ~€24 million
4. Limerick: ~€23 million
5. Galway: ~€17 million

CONTRIBUTION TO TOWNS

1. Dundalk: ~€21 million
2. Athlone: ~€13 million
3. Ballina: ~€7 million
4. Tralee: ~€6 million
5. Sligo: ~€6 million

**Total national GVA: ~€270 m**

Note: Figures are approximates.  
\*Top 5 cities and Top 5 towns account for €253m (93%) of this total.

## CONTRIBUTION TO EMPLOYMENT

Bus Éireann employs >2,700 staff directly, with an additional ~6,100 jobs supported in its supply chain.

Through its activities, Bus Éireann makes a vital contribution to employment in communities across Ireland, both directly and throughout its supply chain.

Directly, Bus Éireann employs more than 2,700 staff, as drivers and mechanics, in administration and human resources, and in management, amongst other roles. These are well-paid jobs, with staff based in cities, towns, and villages across Ireland (see earlier analysis).

Indirectly, Bus Éireann supports the employment of drivers on schools services through its relationship with contractors – more than 5,200 drivers are employed through these contracts, serving both traditional schools services and special educational needs services. These workers are a vital cog in Bus Éireann service, as well as pivotal to the lives of more than 120,000 children daily.

Additionally, indirect employment is generated in Bus Éireann’s wider supply chain, in firms that support its activities and operations, such as in repair and maintenance, fuel, and professional services. Almost 900 jobs are supported in this way. Together, the sum of schools drivers and supply chain workers is ~6,100 – a significant contribution to employment, a large share of which is based outside major cities.

In total, Bus Éireann supports direct and indirect employment summing to ~8,830. When direct and supply staff are considered (~3,600 excluding schools service contractors), ~3.6 jobs are supported per vehicle based off a fleet size of 1,100 buses.

In addition, Bus Éireann’s contribution to facilitating mobility acts as an enabler of wider job creation, by moving users between locations, with users’ spend at their destinations adding to indirect employment in those locations. From this perspective, Bus Éireann facilitates the distribution of economic spend across Ireland.

Employment	
<b>Direct jobs</b>	2,730
This refers to Bus Éireann’s direct employment of staff	+
<b>Value chain jobs</b>	6,100
Bus Éireann creates indirect jobs through its schools service and supply chain purchases, including maintenance inputs etc	+
<b>Total number of jobs</b>	~8,830
Estimated total number of jobs created in Ireland throughout Bus Éireann’s supply chain	
<b>= Total employment arising from Bus Éireann’s activities is ~8,830</b>	

Source: KPMG impact model  
Note: The above jobs represent value chain jobs as a result of expenditure by the sector, creating jobs in the supplying industries

## CONTRIBUTION TO INCOMES

Bus Éireann and its supply chain support payments of labour incomes summing to ~€263 million.

**Bus Éireann's contribution to the payment of incomes to workers across Ireland is strong, through payroll, contractor spend, and the activities of other suppliers.**

Bus Éireann's payroll sums to more than €143 million, with this spend flowing to employees across the company's workforce. This spend is broadly split, with key locations in Cork, Dublin, Galway, Limerick, and Waterford. With employees often living in counties outside these major urban areas, a share of all payments of incomes can be seen as redistributive.

In addition, Bus Éireann also contributes to the payment of labour incomes indirectly, through its spend on contractors and suppliers. Bus Éireann's spend on bus contractors sums to €164 million – it is

reasonable to assume that half of this will be effectively income for bus contractors. Some spend on school bus contracts will flow to contractors in other forms of payment.

Bus contractor spend is broadly split across the country, with total payments amounting to more than €5 million at most depots. These payments provide bus contractors with a level of income enabling them to provide vital schools transport services to communities right across Ireland.

Further, through its spend on other suppliers, such as on repair and maintenance, Bus Éireann supports indirect labour income payments amounting to €38 million. Additionally, an assumption is made that ~€82 million is generated as income for bus contractors. Indirect incomes sum to €120 million.

Taking account of direct and indirect labour incomes, Bus Éireann's aggregate support for same sums to €263 million.

LABOUR INCOMES	
<b>Direct labour income</b>	€143m
This is direct income generated by Bus Éireann's activities	+
<b>Value chain income</b>	€120m
Through purchases in the supply chain and local spend, indirect labour income amounts to €120 million	+
<b>Labour income</b>	€263m
Together, total labour income generated through Bus Éireann activities is estimated to be €263 million.	
<b>= Total labour income across supply chain of ~€263 million</b>	

Source: KPMG impact model

Note: The above jobs represent value chain jobs as a result of expenditure by the sector, creating jobs in the supplying industries

## CONTRIBUTION TO THE EXCHEQUER

Bus Éireann and its supply chain contribute to the Exchequer through the payment of income taxes and PRSI.

**As a result of Bus Éireann's and its suppliers spend on wages and salaries, income tax and PRSI payments are made to the Exchequer.**

### INCOME TAXES

Through its total spend on direct payroll of €143 million (2019), Bus Éireann makes a strong contribution to overall income tax and Universal Social Charge (USC) receipts. Salaries paid to Bus Éireann's direct employees make income tax and USC payments of ~€20 million, while income tax and USC generated in the company's supply chain is ~€7 million. The sum total is ~€27 million, a healthy contribution.

### PRSI CONTRIBUTIONS

Bus Éireann makes direct contributions to the Exchequer in the form of employer PRSI. These are estimated to be approximately €12 million. Additionally, Bus Éireann's spend on its supply chain also generates PRSI revenue for the Exchequer – estimated to be approximately €5

million. Together, Bus Éireann and its supply chain contribute ~€17 million for the Exchequer in employer PRSI contributions.

On an employee level, employee PRSI payments sum to €3.5 million directly and €2 million in the supply. Total Employee PRSI revenue generated for the Exchequer is approximately €6 million.

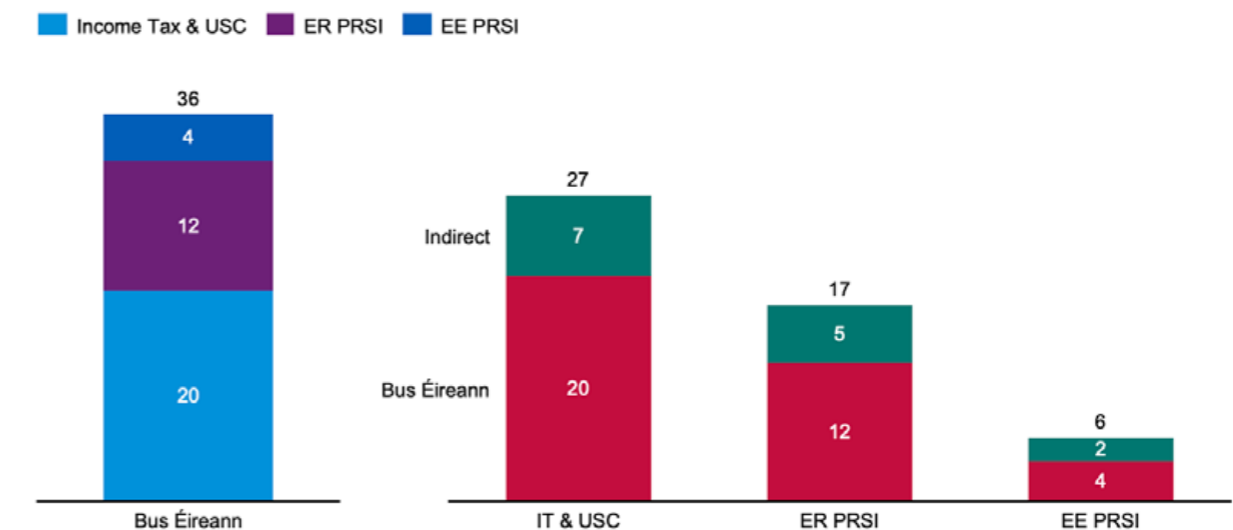
### TOTAL PAYROLL CONTRIBUTIONS

Across income tax, USC, and PRSI, the total contribution of Bus Éireann and its supply chain to the Exchequer is estimated to be in the range close to €54 million. For each €1 paid to a Bus Éireann employee, ~€0.38 is generated directly for the Exchequer (including employer PRSI).

### FUEL TAX

Additionally, Bus Éireann generates revenue for the Exchequer in the form of fuel taxes. In 2019, this amounted to more than €15 million, across taxes on forward purchases of fuel through CIÉ and taxes paid directly to suppliers.

CONTRIBUTIONS TO THE EXCHEQUER – BUS ÉIREANN AND ITS SUPPLY CHAIN



Source: Bus Éireann



## BENEFITS TO USERS

Bus Éireann's services generate positive impacts for the wider economy, enabling people to work and to earn a living.

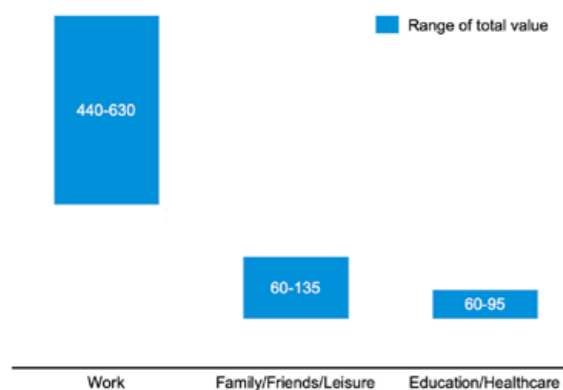
### User benefits and national economy

When somebody is able to access a higher paid job by using Bus Éireann they reap a direct financial benefit. When visits to family and friends are made, social bonds can be stronger. Trips for educational and healthcare purposes enable people to live more full lives.

Research on the value bus users place on their journeys highlights the individual and aggregated value of these journeys. This value – known as the Consumer Surplus – equates to the additional value over the ticket price that users place on a respective journey. Each journey type generates different surpluses, reflective of the relative importance that the journey means to a user.

Using different journey-type values allocated across journey purposes, the total value of journeys to Bus Éireann's users is estimated to be in the region €550 million – €1.0 billion. While intangible to Bus Éireann, it is reflective of the company's broader value contribution to wider society.

TOTAL VALUE OF JOURNEYS TO USERS, 2019



Source: KPMG analysis; CSO Household Budget Survey 2016; Mackie et al. *Buses and Economic Growth* (source)

## BENEFITS TO USERS (CONTINUED)

Users of Bus Éireann's services generate positive impacts for the wider economy, in particular through reducing congestion and emissions.

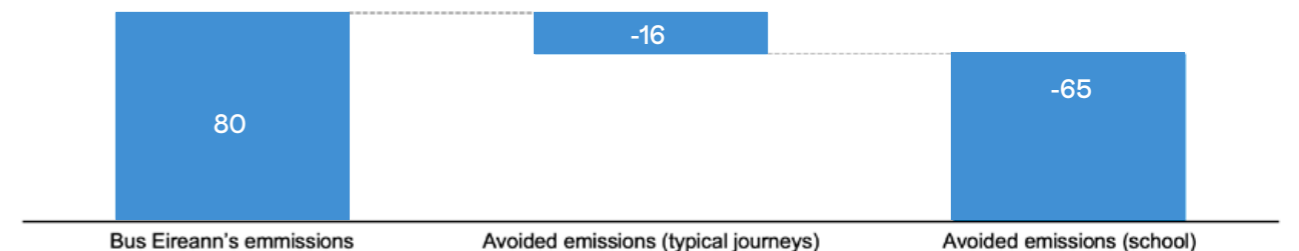
**A key characteristic of bus services, compared to most other consumer products, is that changes in demand can also have a large impact on non-users through reduced congestion and emissions.**

Decongestion is, by far, the largest non-user benefit that bus networks give rise to. If a large proportion of peak bus trips were to transfer onto cars, then roads would become significantly more congested, therefore resulting in millions of euro of lost productivity and leisure time.

This provides a compelling case for Bus Éireann as an attractive and affordable service, and helps understand why public authorities may decide to subsidise bus services or bus users directly: not only can bus users be compensated by the benefits they provide to other road users but bus use can also be encouraged, in the pursuit of the common good.

KPMG estimates that up to 12.6 million car journeys are avoided annually by bus passengers choosing to leave their car at home and instead travelling on typical Bus Éireann services. Assuming half of school journeys are taken by bus rather than car, a further 21.5 million journeys are avoided.

QUANTUM OF EMISSION – BASELINE AND AVOIDED



Sources: Bus Éireann Sustainability Strategy (2021), CSO (2019), DTTAS CAF (2020), US EPA (source)

### IN FOCUS: FLEXIBLE LABOUR MARKETS

Bus Éireann helps the functioning of the economy by contributing towards more flexible labour markets.

- **Increasing the number and range of jobs accessible to workers.** This can be especially critical for low income or less skilled workers. Such individuals are less likely to have access to a car and may also qualify for a narrower range of jobs.
- **Improving the match between workers and jobs, thereby raising productivity.** Research shows that around one in ten bus commuters would be in a less productive occupation, or out of work altogether, if their regular bus service was not available
- **Making work pay.** Transport costs absorb a high share of workers' wages. CSO research shows that transport costs account for ~15% of a household's income, and are higher in rural areas (~19%) than in urban areas (~13%). For low income households, high fixed costs of car ownership make using Bus Éireann their only option.
- **Providing a key link to education and training.** The majority of young people do not have access to a car and therefore depend on bus services to reach specialist education facilities and to access part-time work opportunities while in education.
- **Providing employers with access to a wider and more varied labour pool.** This is recognised by many employers who factor in public transport accessibility into their wider location decisions.

# SOCIAL IMPACT

## BACKGROUND: SOCIAL IMPACT ANALYSIS

Bus Éireann generates a range of diverse social impacts for communities and service users across Ireland.

### Social contribution

**Vulnerable and socially disadvantaged groups in society are most reliant on bus networks - this includes low income households; part-time workers; young people in education, or trying to enter the job market; older people; disabled people; jobseekers and women.**

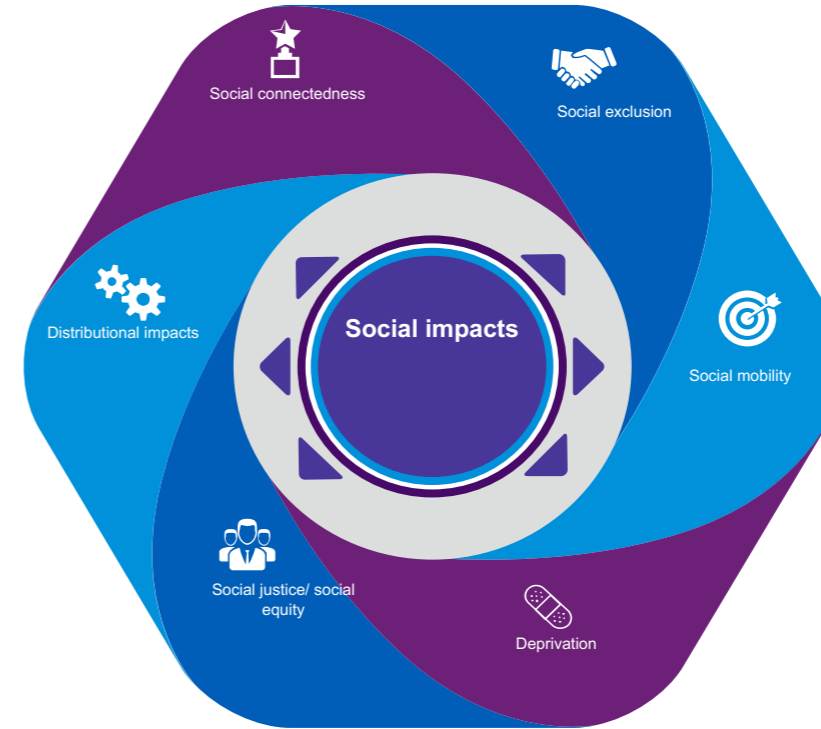
Bus services are key to providing access to opportunity, including providing the jobless with access to jobs; young people to education and training; and providing a way out of social isolation for older and disabled people.

The previous chapter articulated the scale of the economic benefits that accrue to society as a whole from the presence of Bus Éireann in communities across Ireland.

But another important feature of bus networks is that they tend to be of greatest service to the most vulnerable groups in society, be it those on low incomes, those trying to find work, young people, older people or disabled people.

The increased access to opportunities which bus networks provide to these groups, and in some cases related health benefits, can make a powerful contribution to greater social inclusion, social mobility and reduced government expenditure on health, social care and welfare payments.

Social impacts cover the human experience of the transport system and its impact on social factors, not considered as part of economic or environmental impacts.



- **Social connectedness:** Measures the social interactions, relationships and networks that people can have, and the benefits of that to an individual or society.
- **Social exclusion:** Analyses the ability of people to participate in economic, political and social life of the community based on accessibility via Bus Éireann services.
- **Social justice/social equality:** This considers the cost and emissions of using Bus Éireann's service and the impact it makes to financials and well-being.
- **Deprivation:** Looks at the lack of material benefits in a society due to improper connectivity or lack thereof.
- **Social mobility:** Ability of Bus Éireann route network and service to allow people to access opportunities in nearby commercial districts and enterprise zones.



## ENABLING SOCIAL AND ECONOMIC ACTIVITY

Bus Éireann enables people to work, socialise, engage in education, and attend healthcare.

### Enabling mobility

**Through its deep network in communities across Ireland, Bus Éireann makes a valuable contribution to enabling all cohorts in society to live full and active lives.**

Bus Éireann is a clear cornerstone of employment accessibility and, therefore, a driver of economic growth. Across its services, Bus Éireann enables users to make over 17 million bus journeys to their workplaces per annum. These are local, regional, and inter-city journeys that enable workers to earn incomes and to contribute economically.

In addition, a minimum of ten million journeys are made per annum for the purpose of seeing family and friends. This social role is vital for many, providing access between generations and across different socio-economic groups.

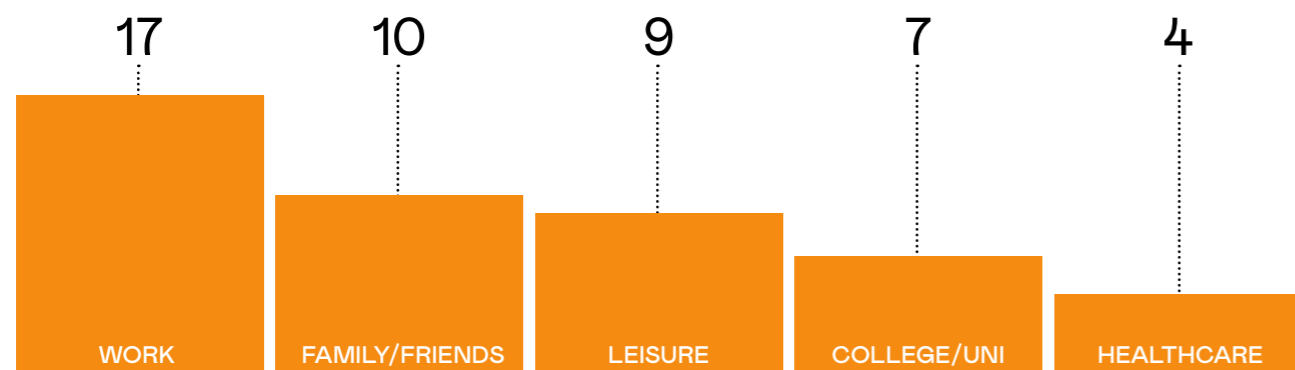
As an enabler of education, Bus Éireann is an

important pillar. A minimum of seven million journeys are made annually for purposes of travelling to college or university. These are both single day and weekly journeys, providing students with vital access to and from education and their home base.

In relation to frequency, most users travel on Bus Éireann weekly (33%), followed by 29% daily and 25% monthly. This is reflective of strong use, and points to the importance of the service for communities across Ireland.

On an age cohort level, differences and similarities between age levels are observable. Younger people aged 18-24 are more likely to travel for college (41%) and work (29%), while people aged over 60 use Bus Éireann mainly for leisure (33%), to keep in touch with family and friends (29%), and for healthcare (14%). In the age group 25-49, travel for work is the main purpose (range of 43%-53%). Taken together, it is clear that Bus Éireann is a vital component of public transport provision for significant numbers of people and for specific groups in society.

NUMBER OF JOURNEYS BY MAIN PURPOSE OF TRAVEL, MILLIONS



Sources: Bus Éireann; KPMG survey of users (January 2021)

## PROVIDING A LIFELINE TO MANY

Many of Bus Éireann's passengers use the service as their only travel option.

### Providing a lifeline

**Bus Éireann serves communities that are marginalised in terms of transport infrastructure, providing a service to hundreds of thousands of people whose only travel option is provided by Bus Éireann.**

Over 45% of Bus Éireann's users report having no alternative as their reason for choosing Bus Éireann, reflective of the importance of Bus Éireann to its users.

On a demographic level, complete reliance on Bus Éireann's services can be clearly observed amongst students and young people (65%) and workers (45%). Free Travel Pass holders are less likely to have no other option than to use Bus Éireann (29%). In the case of older people and the unemployed, the value of the service to these specific passenger groups may be relatively higher.

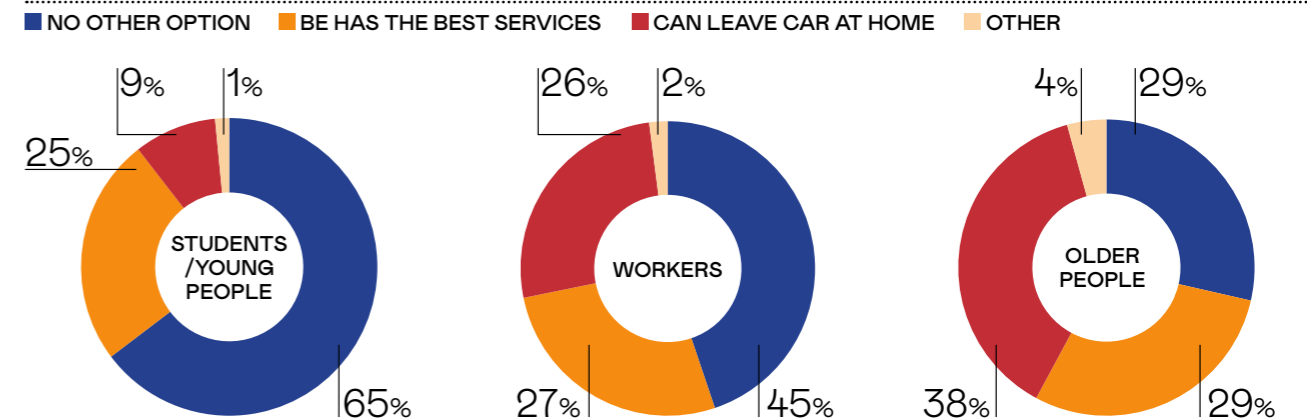
In relation to the comfort and quality of services that Bus Éireann aims to deliver, its level of service is a key factor for many users: 25% of students and young people,

27% of workers and 29% of older people and the unemployed believe that Bus Éireann offers the best service compared to other transport options.

Additionally, Bus Éireann also enables many users to leave their cars at home. 38% of older people and the unemployed choose Bus Éireann for this reason, with lower rates amongst workers (26%) and students and young people (9%). Increasingly, many commuters travel to their local bus stop using active transport options. For those who cannot do so, Bus Éireann invests in order to increase accessibility. In 2020, bus stop and station accessibility improvements with the support of the NTA, were made in Killarney, Rosslare, Tralee and Waterford while over 90% of Bus Éireann's fleet is wheelchair accessible.

Bus Éireann's contribution to people's lives is particularly strong in relation to its contracted schools service. Each day, over 105,000 children are transported to local schools, while close to 15,000 children are transported on Special Education (SEN) services.

DEPENDENCY ON BUS ÉIREANN



Sources: Bus Éireann; KPMG survey of users

## IMPORTANCE OF FLEXIBILITY

Bus Éireann is a vital service for many and ensures accessibility, connectivity and ease of movement.

### Connecting people and places

**Bus Éireann provides a vital service for many and connects people and places. Travel times are typically reasonable and different cohorts stay at their destinations for different periods of time.**

Bus Éireann's passengers are most likely to spend a full day at their destinations (38%), when compared to other options, and 23% of passengers will typically spend the full week there (for the working or college week). In this way, Bus Éireann enables people to access and participate in Ireland's workforce and/or to obtain the qualification to increase their opportunities.

Travelling for leisure, to access shopping and food amenities is also a popular reason to use Bus Éireann with 30% of passengers spending half the day (the afternoon or evening) at their destination. This facilitates same day commercial activity across counties.

On a demographic level, workers are most likely (40%) to spend a full day at their destination, followed a half day (31%). Hence, Bus Éireann is providing workers with the opportunity to work, through its provision of regular services.

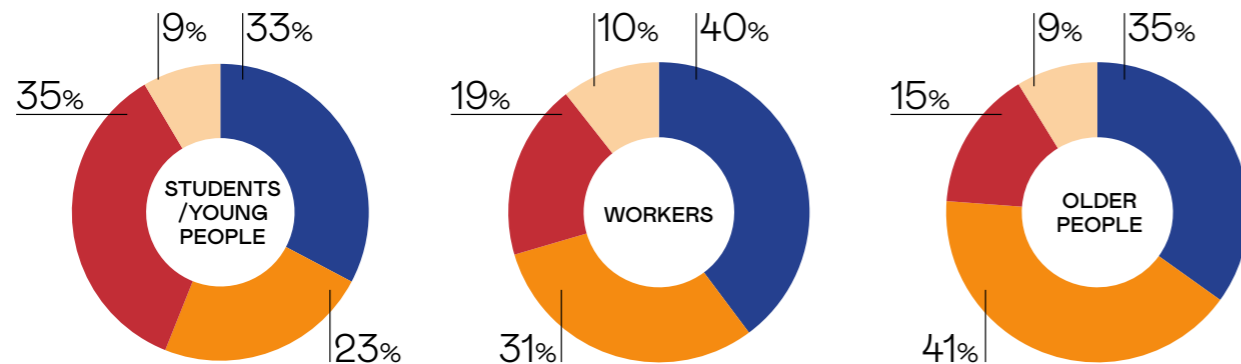
Students and young people are most likely to spend several days at their destination (35%), followed by a full day (33%). This reflects this cohort's use of Bus Éireann for travel to and from further education.

Older people are most likely to spend a half day at their destination (41%), followed by a full day (35%). Bus Éireann's regular schedules provide this cohort with the flexibility to return home within a number of hours, a particularly beneficial option for elderly individuals.

This exemplifies that Bus Éireann is committed to the provision of a well-connected and accessible public transport system that facilitates passengers' ease of living and thriving of local communities.

TIME SPENT AT DESTINATION

■ FULL DAY ■ HALF DAY ■ SEVERAL DAYS (WORK WEEK/COLLEGE) ■ WEEKEND



Sources: Bus Éireann; KPMG survey of users

## CONTRIBUTING TO PRIMARY EDUCATION

A high proportion of primary schools, particularly in rural Ireland, have a school bus service. Uptake is highest in the west and border regions.

### Primary schools services

**Schools services are provided by Bus Éireann on behalf of the Department of Education where children live more than 3.2km from the nearest primary school.**

Bus Éireann contracts the provision of school transport services to small-scale contractors based in communities across Ireland. Outside of Dublin, 44% of all primary schools have a schools service in operation. Nationally, 10% of all primary school age students are transported on schools services routes. Excluding Dublin, 13% of primary school students access school on a school bus service.

On a geographic level, some differences are observable, reflecting settlement patterns. In County Cork, 61% of primary schools have schools services currently in operation, transporting 11% of the overall primary school student population.

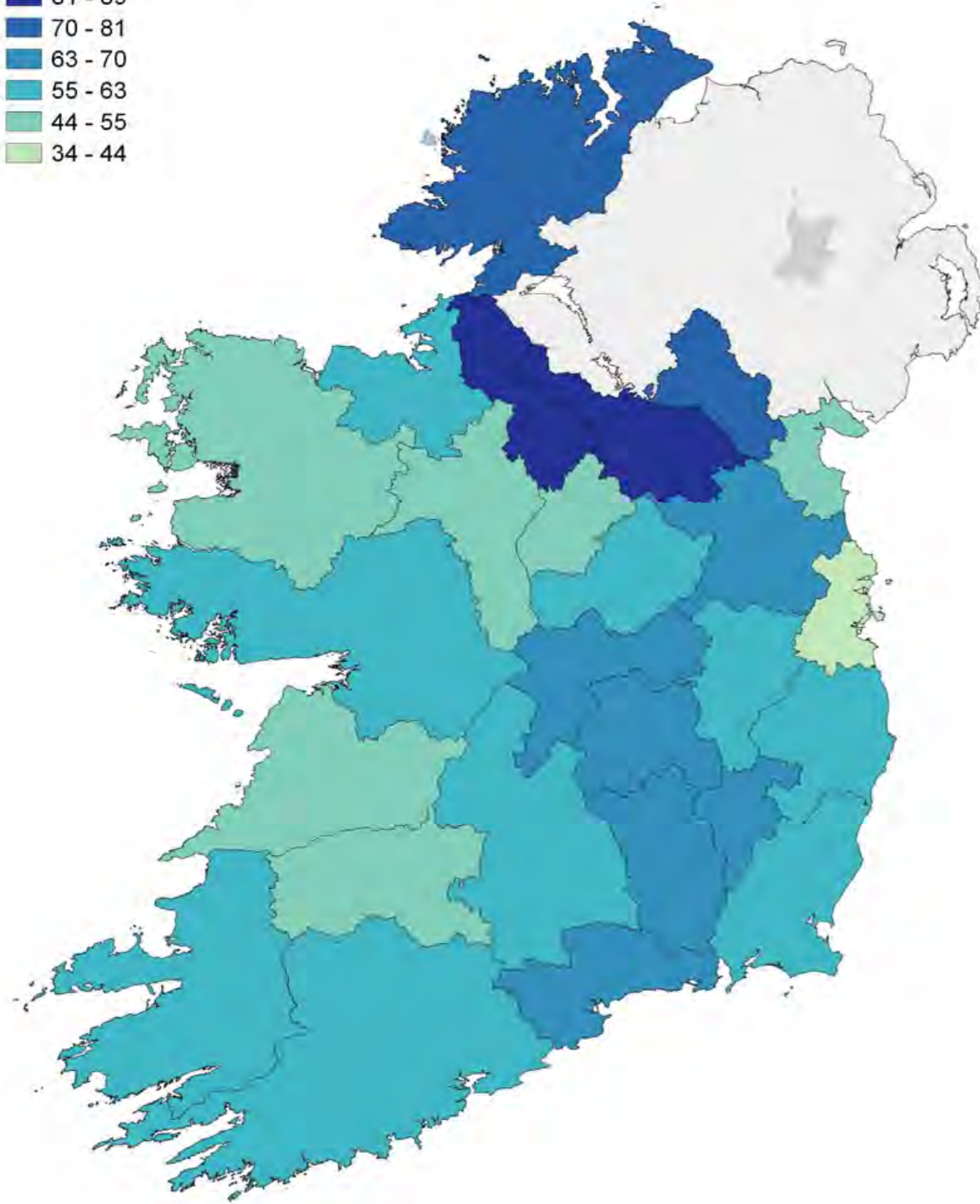
The differences between the proportion of schools with a service and the proportion of overall students transported is in part due to the nature of the schools service offering and the dynamics of accessibility in rural and urban areas. Additionally, 14,500 students are supported through Special Education services.



### Primary Schools

Proportion of all schools with a Bus Éireann "schools service" (%)

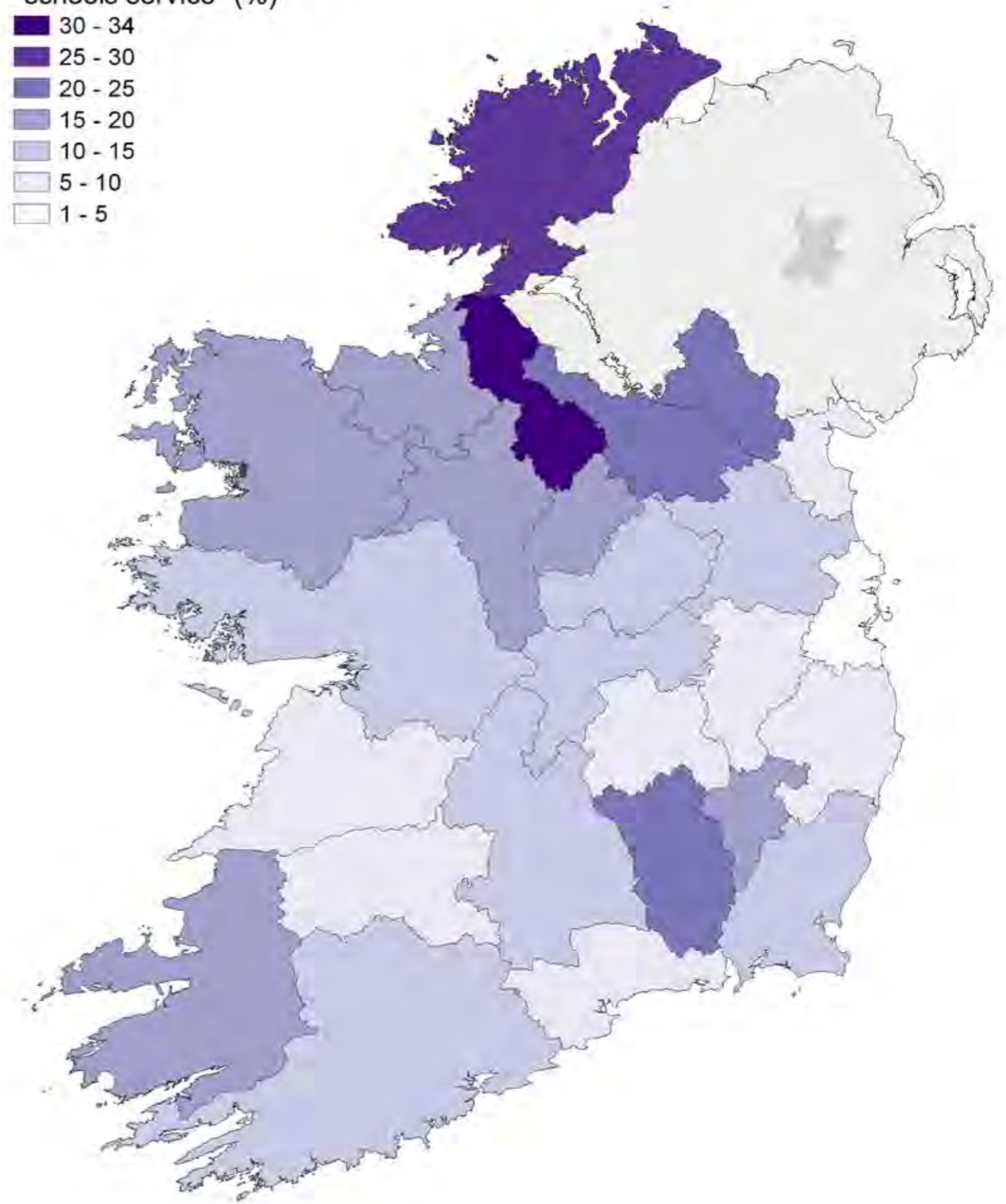
- 81 - 89
- 70 - 81
- 63 - 70
- 55 - 63
- 44 - 55
- 34 - 44



### Primary Students

Proportion of all students transported by Bus Éireann "schools service" (%)

- 30 - 34
- 25 - 30
- 20 - 25
- 15 - 20
- 10 - 15
- 5 - 10
- 1 - 5



## SUPPORTING POST-PRIMARY EDUCATION

The vast majority of post-primary schools in rural Ireland are in receipt of a school bus service. Uptake is highest in the West and Border regions.

### Post-primary schools services

**Bus Éireann's contribution to school transport is strong at post-primary level, providing many students with access to the education where travel may be otherwise much more difficult.**

Schools services are provided by Bus Éireann on behalf of the Department of Education, where students live more than 4.8km from the nearest post-primary education centre.

Nationally, and outside of Dublin, upwards of 80% of all post-primary schools have a schools service in operation, reflecting the significant level of service available. Additionally, there are 14 counties in which 100% of post-primary schools have a schools service in operation.

In terms of uptake, post-primary pupils in Donegal and Leitrim are most likely to travel to school on a schools service – evidently the impact of schools services generates significant benefits for users and families in these areas.

Overall, a higher proportion of post-primary schools/students utilise schools services compared to primary schools/students. This could be due to the difference in the quantum of primary and post-primary schools in each county, requiring further commuting distance for post-primary schools and therefore a need for parents to find alternative means of transport.

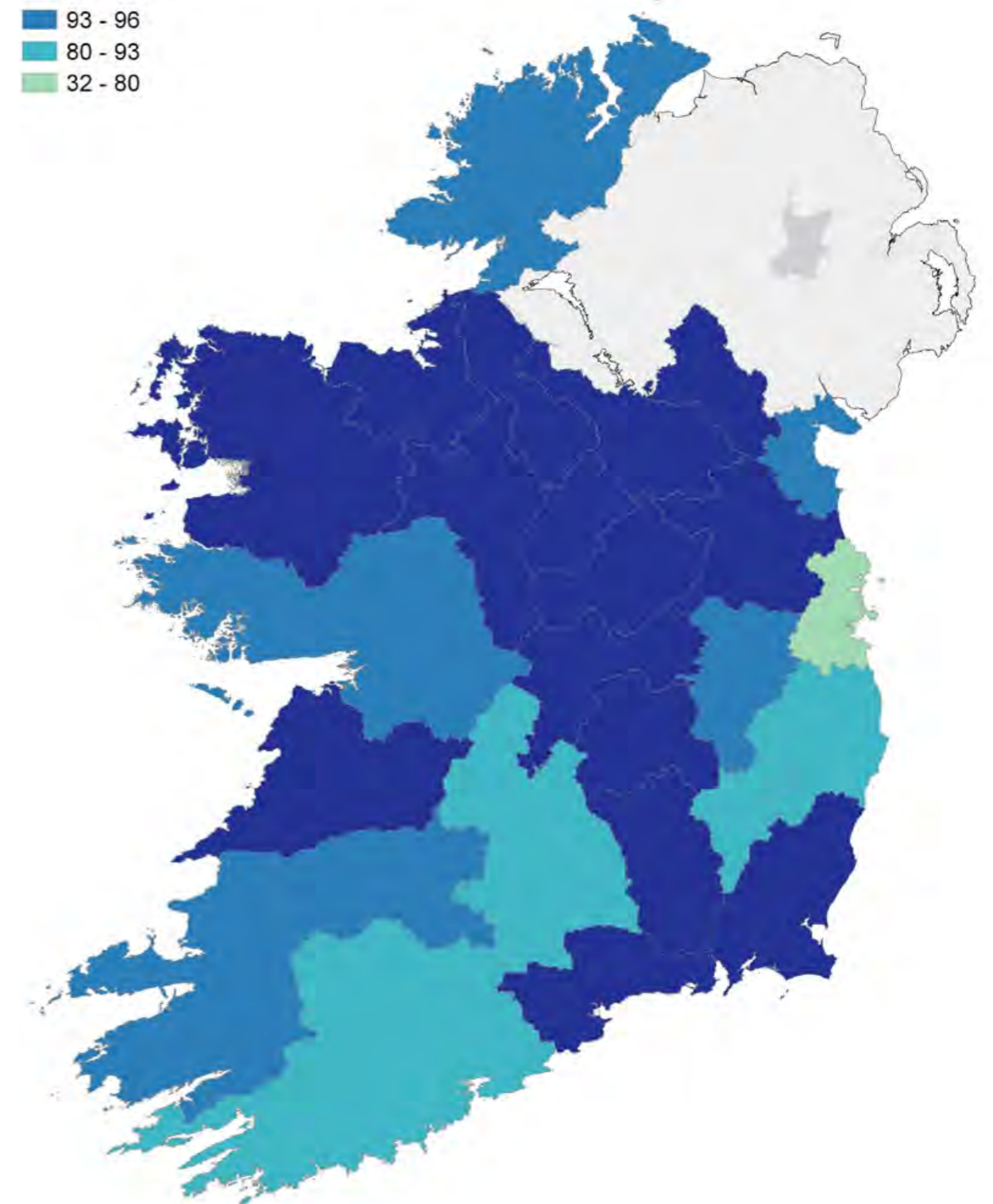


## PROPORTION OF POST-PRIMARY SCHOOLS (BLUE) AND STUDENTS (PURPLE) PER COUNTY UTILISING BUS ÉIREANN SCHOOLS SERVICES

### Post-Primary Schools

Proportion of all schools with a Bus Éireann "schools service" (%)

- 97 - 100
- 93 - 96
- 80 - 93
- 32 - 80

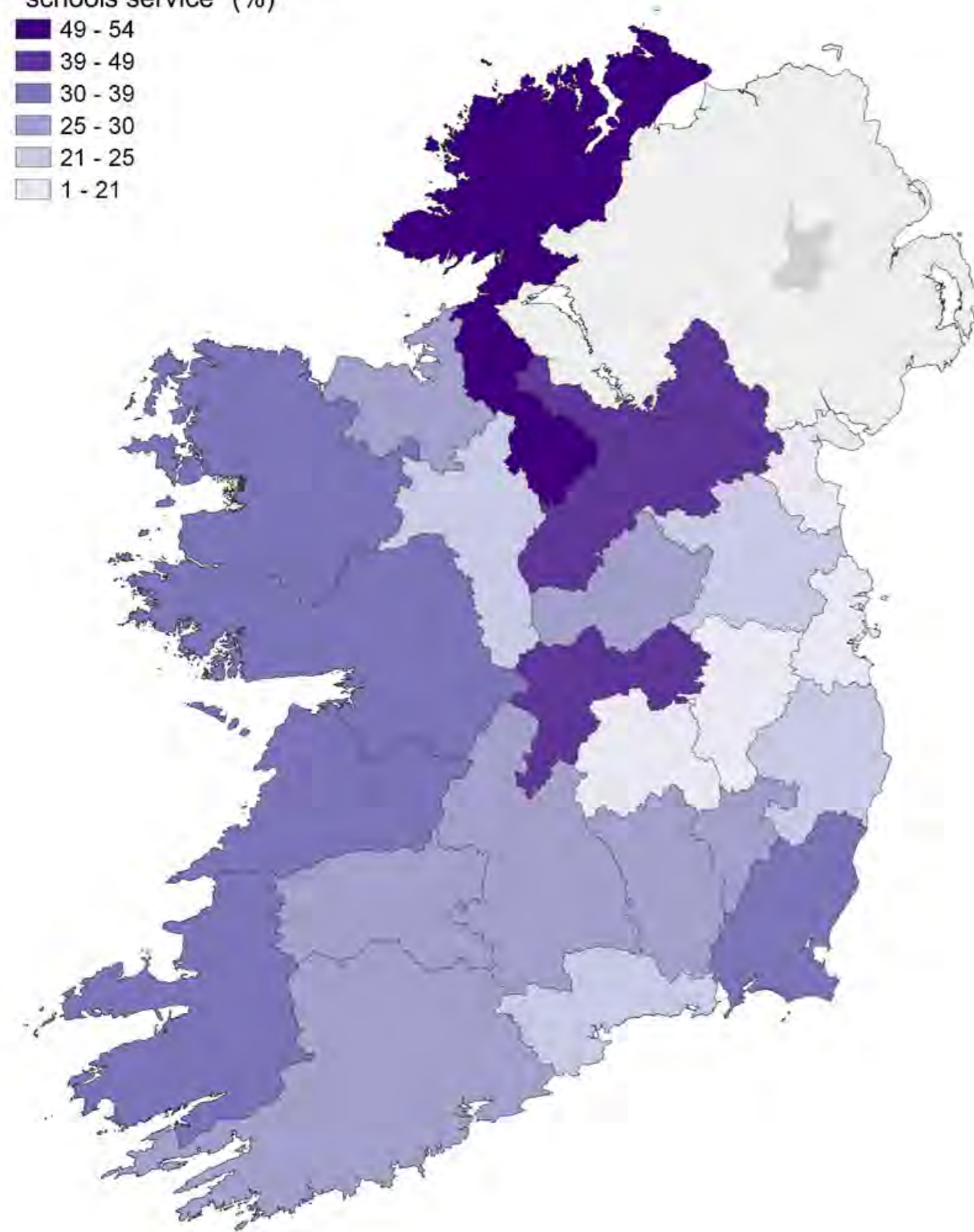


Source: Bus Éireann

### Post-Primary Students

Proportion of all students transported by Bus Éireann "schools service" (%)

- 49 - 54
- 39 - 49
- 30 - 39
- 25 - 30
- 21 - 25
- 1 - 21



Source: Bus Éireann

Connectivity to tertiary education in major cities and towns is high, and local services provide additional services within those settlements.

### Access to higher education

**Bus Éireann provides students across Ireland with access to tertiary education at Higher Education through its PSO and Expressway services and city and town services. Bus Éireann serves 880 stops within 2km of a Higher Education Institute.**

Tertiary education in Cork has the highest level of accessibility due to the central location of the institutes, the volume of PSO routes and the convergence points of Expressway routes in the city centre.

Galway city and Limerick city have high levels of accessibility for similar reasons. Dublin city is also positively influenced by the central location of the institutes and route convergence points.

Hence, Higher Education Institutes (HEI) in four of the five cities in Ireland have high levels of accessibility via Bus Éireann services for students from outside the direct area. Additionally, for students in cities outside Dublin and in several towns with town services, all students can travel on city and town services to/from college safely and at low cost.

Overall the accessibility to tertiary education is more heavily influenced by the presence of PSO than Expressway services.

#### NUMBER OF STOPS WITHIN 2KM OF A HEI AND NATIONAL PSO/EXPRESSWAY AND ROUTES

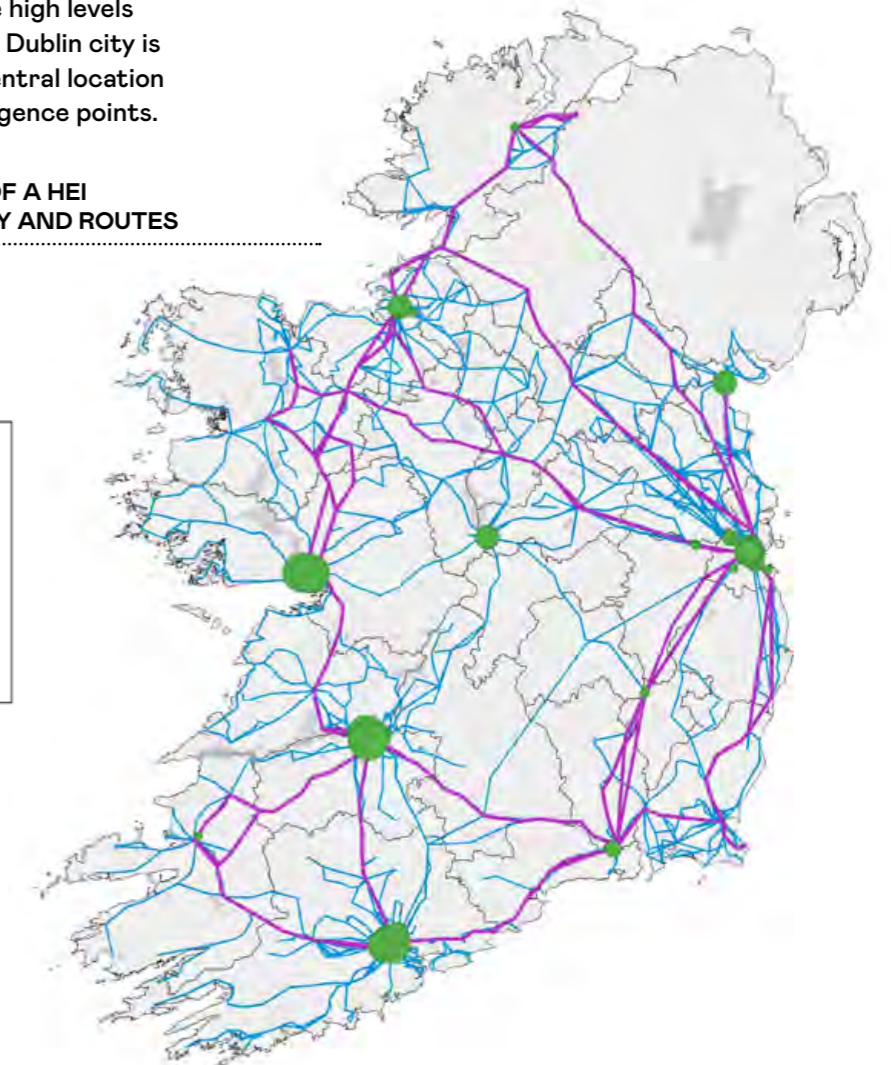
##### ALL ROUTES 2021

- Expressway
- PSO

##### Higher Education Institutes

Number of Stops within 2km

- 0 - 4
- 4 - 14
- 14 - 55
- 55 - 78
- 78 - 213



Note: HEIs on map includes all institutes classified as Universities and IoTs.

## ENABLING ACCESS TO HEALTHCARE

Connectivity to healthcare is highest in Cork, Galway and Limerick cities, driven by PSO route volume and local services.

### Access to healthcare

**Bus Éireann provides communities across Ireland with access to healthcare via PSO services, Expressway services, and city and local services. There are 1,130 Bus Éireann bus stops within 2km of hospitals.**

Hospitals located within Cork, Galway and Limerick cities have the greatest connectivity on Bus Éireann services, due to the high volume of PSO routes in operation within these cities and the location of central hospitals. Hospitals in these cities have more than 78 active bus stops within 2km.

Dublin has the greatest number of hospitals, with accessibility provided to communities across Ireland through PSO, Expressway, and commuter routes.

On a regional level, large towns with hospitals are typically connected by PSO routes (see red icon on blue line). A number of towns with hospitals have local services, providing access to healthcare within those towns to local communities. Hospitals in Drogheda, Ennis, and Navan have more than 14 stops within 2km.

NUMBER OF STOPS WITHIN 2KM OF AND NATIONAL PSO/EXPRESSWAY

#### ALL ROUTES 2021

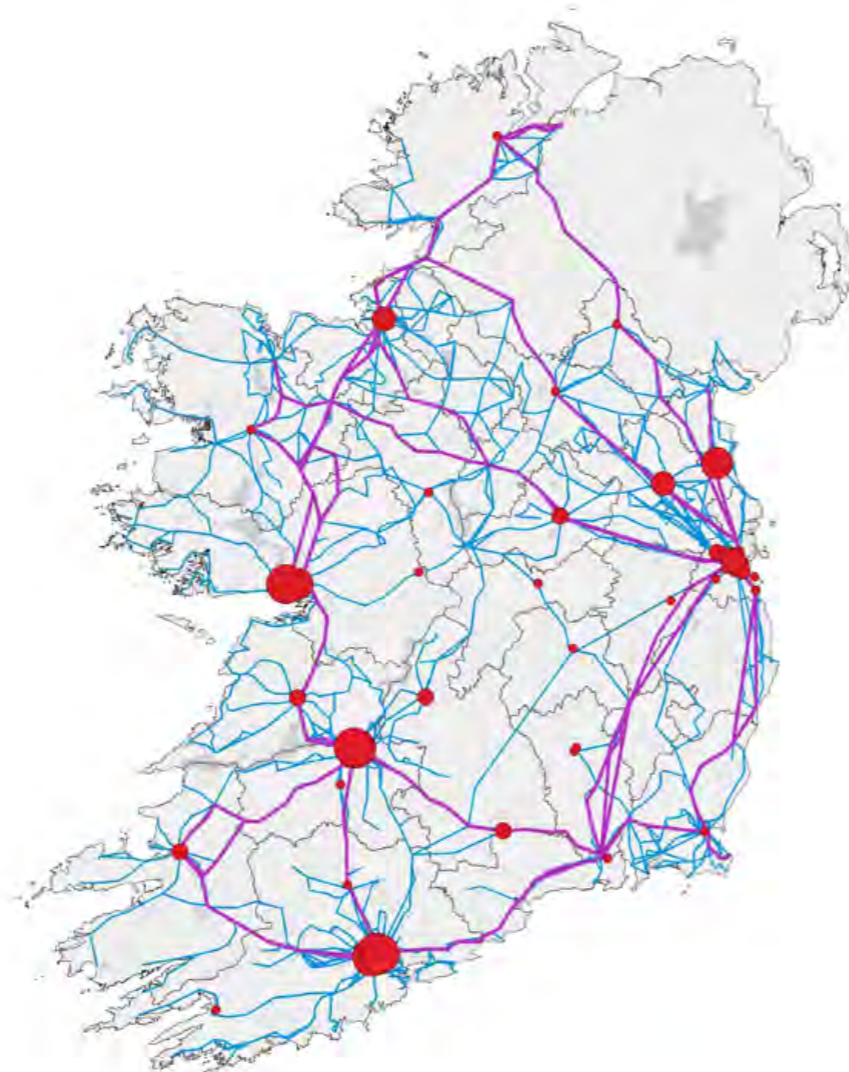
- Expressway
- PSO

#### Hospitals

##### Number of Stops within 2km

- 0 - 4
- 4 - 14
- 14 - 55
- 55 - 78
- 78 - 215

*Note: Healthcare facilities on map include all General/Acute, Maternity, Orthopaedic and Paediatric Public Hospitals listed on the HSE website (source)*



## CUSTOMERS' VIEWS

### SATISFACTION ACROSS THEMES

Satisfaction with Bus Éireann's services is high. It provides an essential service and boosts social and economic activity.

#### Satisfaction – overall

**Overall, customers are broadly satisfied with the contribution Bus Éireann makes across a number of themes: influence, essential service, and economic and social activity.**

Firstly, over 68% of customers agree or strongly agree that Bus Éireann positively influences their lives and over 83% of customers agree or strongly agree that Bus Éireann provides an essential service from them or their family. These high rates of agreement point to the importance of Bus Éireann to individuals and families in communities across Ireland.

Along with its positive impact and essential influence on its customers' lives, customers also agree and strongly agree that Bus Éireann boosts economic activity (69%) and boosts social activity (68%).

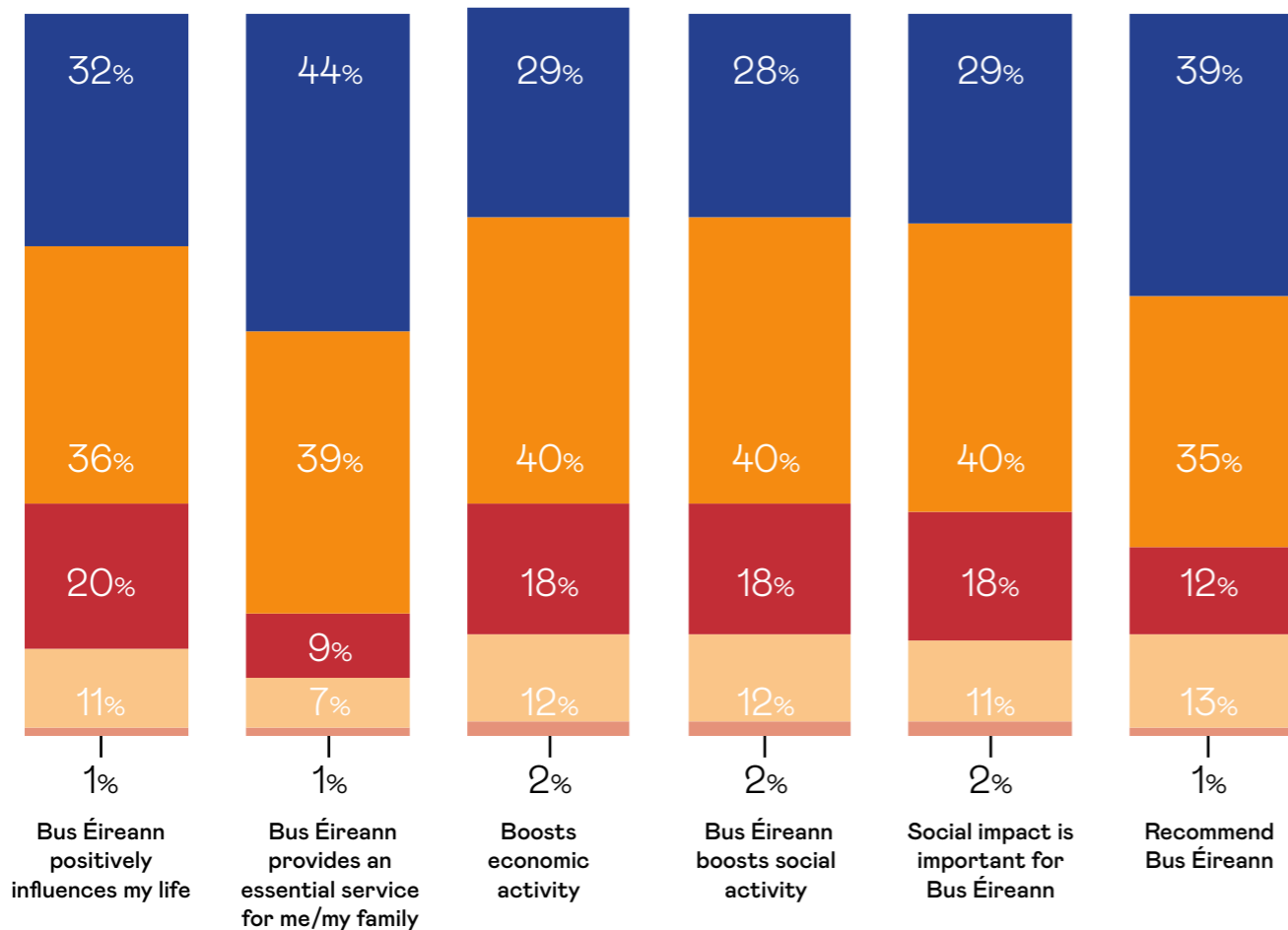
Bus Éireann's commitment to delivering excellent customer experience and social impact was positively reinforced by customers' responses: 69% either agree or strongly agree that social impact is important to Bus Éireann.

On a macro level, satisfaction with Bus Éireann's services is further evidenced through customers' agreement (74%) that they would recommend Bus Éireann to others. In addition, when asked to score Bus Éireann on a scale of 1-5, 38% of users rated Bus Éireann with 5 stars and 32% rated it with 4 stars.



OVERALL SATISFACTION WITH BUS ÉIREANN

STRONGLY AGREE NEUTRAL DOES NOT APPLY  
 AGREE DISAGREE/STRONGLY DISAGREE



Sources: KPMG survey of users

ECONOMIC AND SOCIAL IMPACT ASSESSMENT

SATISFACTION ON A DEMOGRAPHIC LEVEL

Satisfaction with Bus Éireann is high across demographic groups, in particular for older people.

Satisfaction – demographics

Bus Éireann services are committed to delivering excellence, comfort and accessibility to its diverse pool of users in the community.

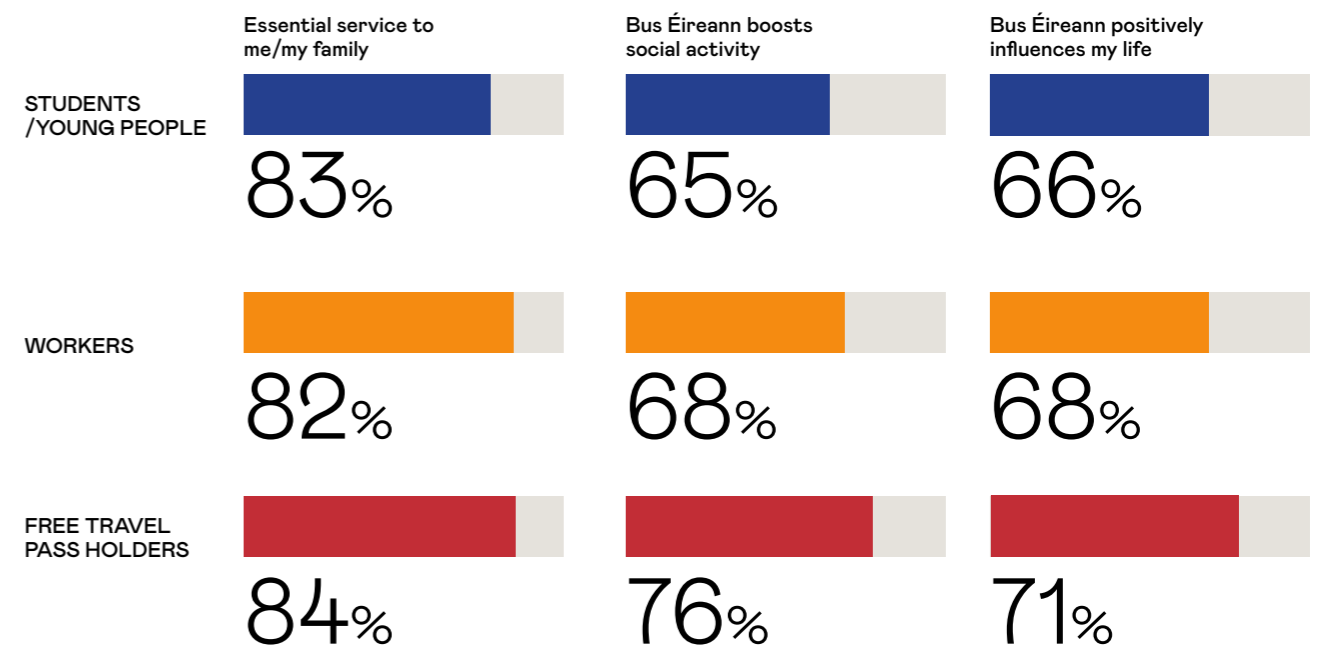
Overall satisfaction (highlighted on previous page) highlights Bus Éireann’s impact on aspects such as influence on users’ lives; essential service provision, and boosts to social and economic activity, amongst others.

On a demographic level, 82%, 83%, and 84% of workers, students/young people, and Free Travel Pass holders strongly agree or agree that Bus Éireann is an essential service to them and their families. These high rates highlight the value Bus Éireann brings to different demographic groups, while also emphasising the consistency of these views.

In terms of Bus Éireann’s contribution to supporting and boosting social activity, it appears that customers’ satisfaction with Bus Éireann’s social activity role increases with age: students and young people (65%), workers (68%) and older people (76%)

Complementing the provision of essential services to its customers, 66%, 68%, and 71% of students/young people, workers, and older people and the unemployed respectively agree or strongly agree that Bus Éireann positively influences their lives.

SATISFACTION WITH BUS ÉIREANN (% ANSWERING AGREE/STRONGLY AGREE)



Sources: KPMG survey of users

ECONOMIC AND SOCIAL IMPACT ASSESSMENT

PREPARED FOR BUS ÉIREANN



# APPENDICES

## KEY STATISTICS ON BUS ÉIREANN

	Stops	Students	Employment	HEIs	Hospitals
County	Total number of stops	Students transported per day	Number of Employees	Stops within 2km	Stops within 2km
Carlow	20	2,450	9	6	-
Cavan	80	3,730	56	-	3
Clare	300	3,430	63	-	14
Cork	1,280	15,920	567	391	685
Donegal	70	9,520	77	3	3
Dublin	180	5,770	355	529	247
Galway	520	8,990	258	208	200
Kerry	120	5,420	82	2	7
Kildare	20	5,590	52	6	0
Kilkenny	40	3,940	62	-	3
Laois	10	1,780	19	-	4
Leitrim	90	2,040	26	-	-
Limerick	380	5,230	154	202	324
Longford	40	2,240	19	-	-
Louth	240	3,690	132	15	71
Mayo	250	5,020	105	-	2
Meath	370	5,200	108	-	55
Monaghan	30	3,550	41	-	4
Offaly	10	3,130	27	-	2
Roscommon	80	1,770	44	-	3
Sligo	230	2,200	78	45	47
Tipperary	100	5,600	102	-	17
Waterford	80	2,870	96	10	3
Westmeath	170	2,920	50	29	9
Wexford	200	6,180	74	-	4
Wicklow	90	3,660	29	-	-
Other/not specified	30	-	16	-	-
<b>Grand Total</b>	<b>5,010</b>	<b>121,820</b>	<b>2,701</b>	<b>1,446</b>	<b>1,707</b>

\*Note: figures for students and stops rounded to nearest 10 and may not sum due to rounding.



THE CONTACT AT KPMG IN CONNECTION WITH THIS REPORT IS:



**WILLIAM HYNES**  
**Managing Director**  
 KPMG-Future Analytics  
 william.hynes@kpmg.ie



**DARAGH MC GREAL**  
**Economist**  
 Strategy  
 daragh.mcgregal@kpmg.ie