



Intelligence
Briefing ■

Driver Shortage Report 2023
Passenger – Europe
Executive Summary

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IRU and driver shortages

The shortage of professional bus and coach drivers is significant – and getting worse.

Shortages are affecting passenger transport operations worldwide, harming mobility networks and the people, communities and economies that depend on them.

To help the industry address this chronic issue, IRU has been studying the scope of the challenge to identify solutions.

The Driver Shortage Report Passenger – Europe 2023 outlines the current and forecasted shortage of drivers, including a brief view on the level of access and attractiveness of the profession for women, young people and third-country drivers.

In addition to the content in this summary, the full version of the report includes sections on the:

- Economic outlook
- Attractiveness and accessibility of the profession
- Solutions implemented by transport companies to overcome the shortage of drivers

The full report is available for IRU members.

The report also has a companion version on driver shortages in the goods transport sector.

Acknowledgements

Thank you to all IRU members and partners that have contributed to this report.

The driver shortage report is updated every year to disseminate best practices and help the industry to better attract and retain drivers.

IRU members



busworld

Dissemination partners



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
This document is a summary
of the full report.

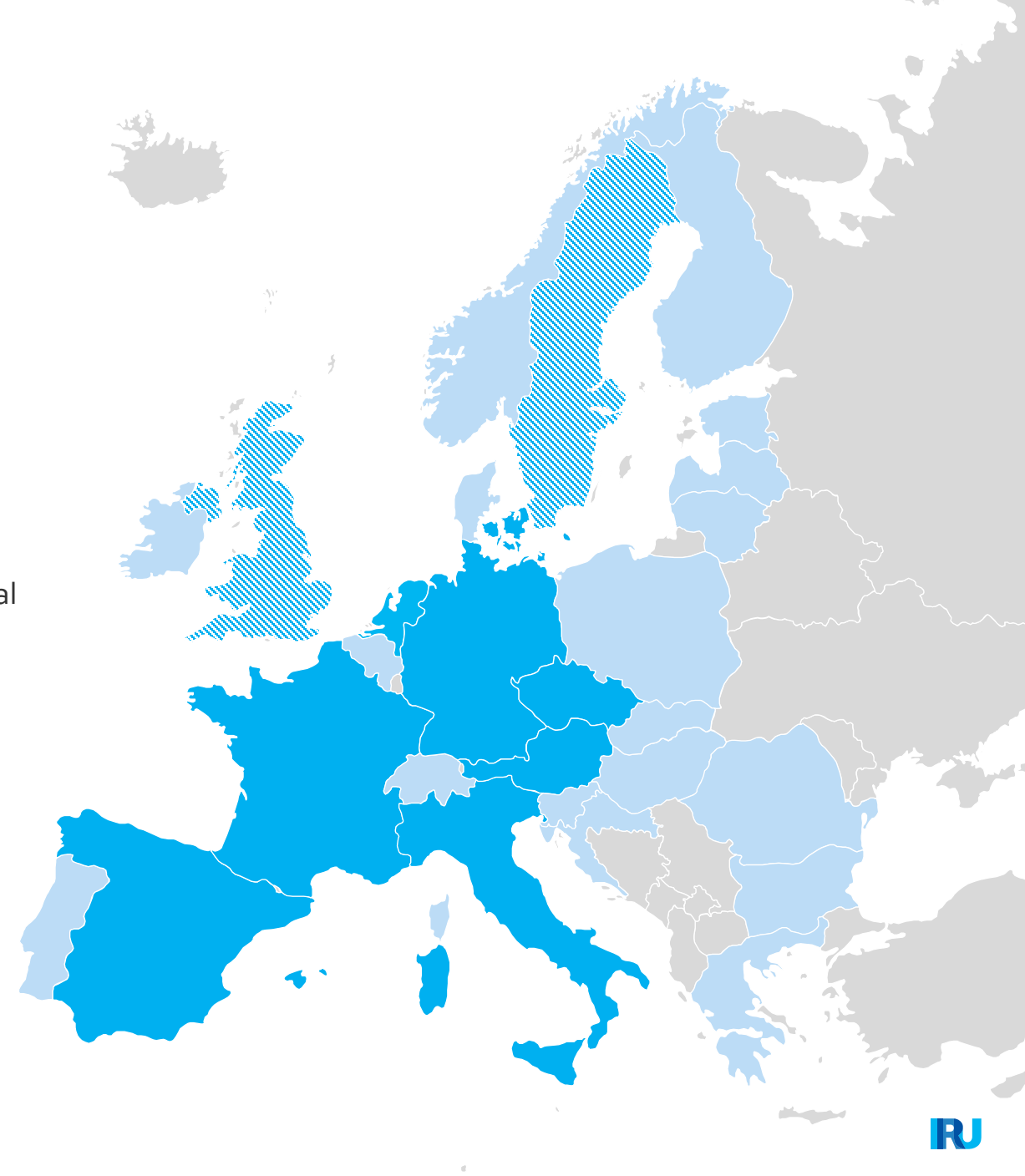
**The full report is available
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1.

Geographical scope

-  Countries with specific driver shortage results from IRU's driver shortage study
-  Countries with specific driver shortage results from national road passenger transport associations' studies
-  European countries (included in the 2023 and 2028 estimation of unfilled jobs)



2.

Overview



105,000 bus and coach driver positions are currently unfilled, representing 10% of total positions

The shortage of bus and coach drivers increased by 54% over the past year¹.

Over 82% of road passenger companies in Europe suffer severe, or very severe, difficulties to fill driver positions. In some regions, public transport services are not guaranteed due to the lack of drivers.

The post-COVID boom in bus and coach transport demand (road passenger transport revenue grew by 10% from 2021 to 2023) has increased

demand for drivers, while the capacity of the industry to attract new people remains challenging.

Women and young drivers

Only 16% of bus and coach drivers are women, below the overall transport industry average (22%) and the working population average (46%) in Europe.

The profession also has an ageing population. Less than 3% of bus and coach drivers are below 25 years old.

75% of operators struggle to find skilled drivers

Due to the shortage of drivers:

- 75% of operators cannot expand their business to meet demand
- 57% of operators are facing higher driver costs, adding to the significant increase in diesel prices in 2022
- 48% of operators are facing declining productivity

Operators' costs have also increased due to rising fuel prices following the war in Ukraine.

Despite falling from its 2022 peak, diesel is still 10% more expensive than before the war.²

Bus and coach driver shortages are forecasted to more than double by 2028

Without action to attract and retain drivers, Europe could have more than 275,000 unfilled bus and coach driver positions by 2028.

The consequences of such a shortage are very serious.

Some public transport lines are already being discontinued due to a lack of drivers (e.g. in Austria and Italy).

A shortage of bus and coach drivers will also harm Europe's CO₂ reduction, slowing down the shift from private cars to collective passenger mobility, as outlined in IRU's Green Compact.

Access to the professions remains a problem

In some EU countries, the minimum age for international transport is between 21 and 24. The "school-to-wheel" gap is a key barrier to attracting new drivers.

Becoming a driver is also expensive due to high licence, training and insurance costs. For example, in Germany, it costs EUR 9,000, on average, to obtain a licence, over four times the minimum monthly wage.

Sources: 1. In 2021, IRU's study was carried out in Q4 2021. The 2023 survey was done in Q1 2023.

The demographic gap persists between young and old drivers, structural change is needed

The industry is struggling to attract new people to the profession.

Less than 3% drivers are below 25 years old, despite 14% youth unemployment in Europe, reaching 30% in Spain, where 14% of bus and coach positions are unfilled and only 5% of drivers are below 25.

The bus and coach driver profession offers an opportunity to reduce youth unemployment while increasing the number of essential workers.

Europe has an ageing population. Its labour pool may not be sufficient to cover the driver gap. Countries with a surplus of professional drivers could help cover the gap. Currently, only 5% bus and coach drivers in the EU are non-EU nationals.

Given the bus and coach sector's contribution to decarbonisation, smart mobility in urban and non-urban areas, social cohesion and employment, it must be considered as a priority sector at the EU and national level.

The full report for IRU members shares legislative solutions as well as best practices and actions pursued by transport associations and companies to overcome the shortage of bus and coach drivers.

3.

Driver shortage



The Importance of the bus and coach industry

a. Bus and coach services are the backbone of collective mobility and decarbonisation

- 1** Buses and coaches transport **8%** of Europe's total passenger land transport volume¹. This represents **0.5 billion** passenger-kilometres per year. Before Covid-19, it was 10%.
- 2** Road passenger transport total sales are expected to reach **USD 101 billion in 2023** (0.5% of Europe's total GDP)².
- 3** There are **905,000 bus and coach drivers** in Europe driving **920,000 buses and coaches**³.
- 4** Buses connect remote and small villages and are used in long and short commutes.
- 5** Buses and coaches are crucial to reaching net-zero emission targets. On average, travelling by private car results in up to **80% more CO₂ emissions per kilometre** compared to travelling by bus and coach⁴.

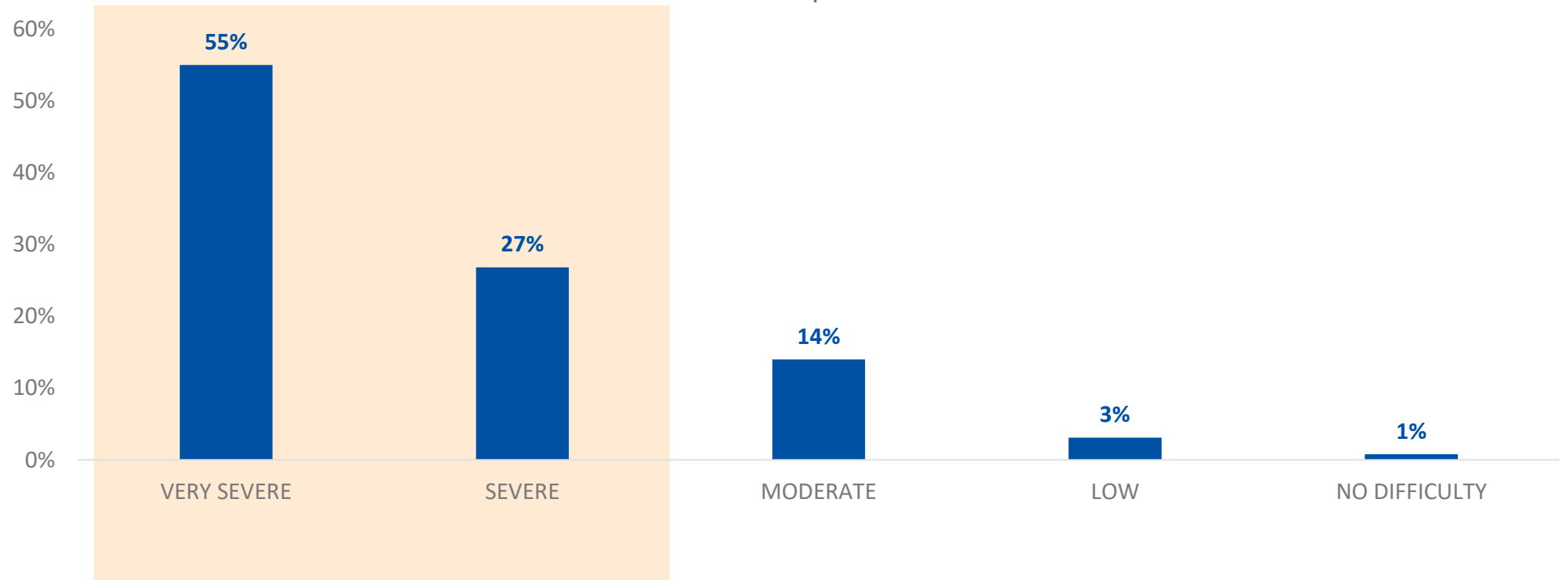
The importance of the bus and coach industry

b. Driver shortages have significant socio-economic consequences



Over 82% of bus and coach companies have severe or very severe difficulties filling driver positions

Difficulties filling bus and coach driver positions
(% companies)



Source: IRU survey 2023, Q: "How much difficulty are you having to fill driver positions due to the shortage of drivers?"

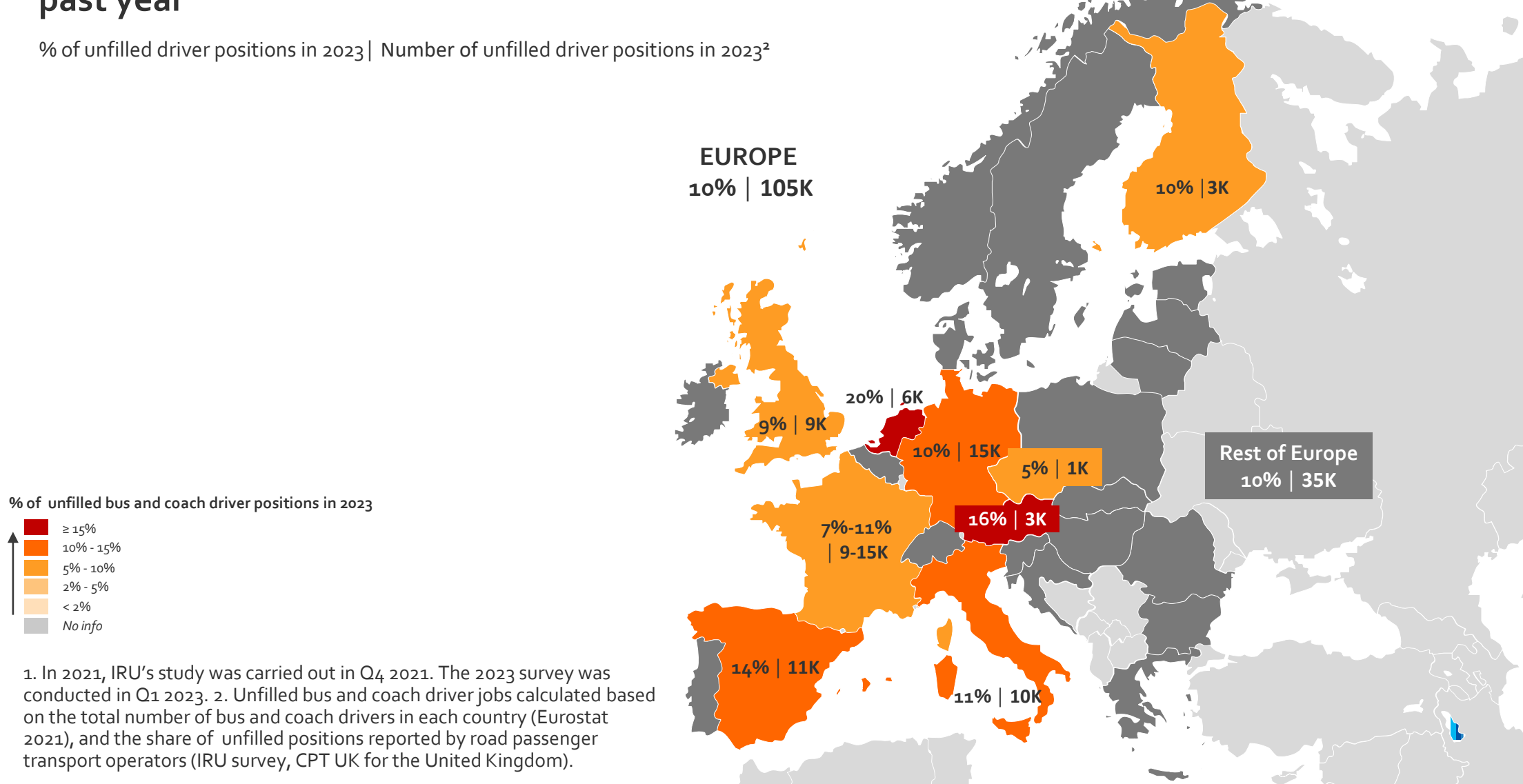
Driver shortage in 2023

105,000 bus and coach driver jobs are unfilled (10% of total positions)

105k

Bus and coach driver shortages increased by 54% over the past year¹

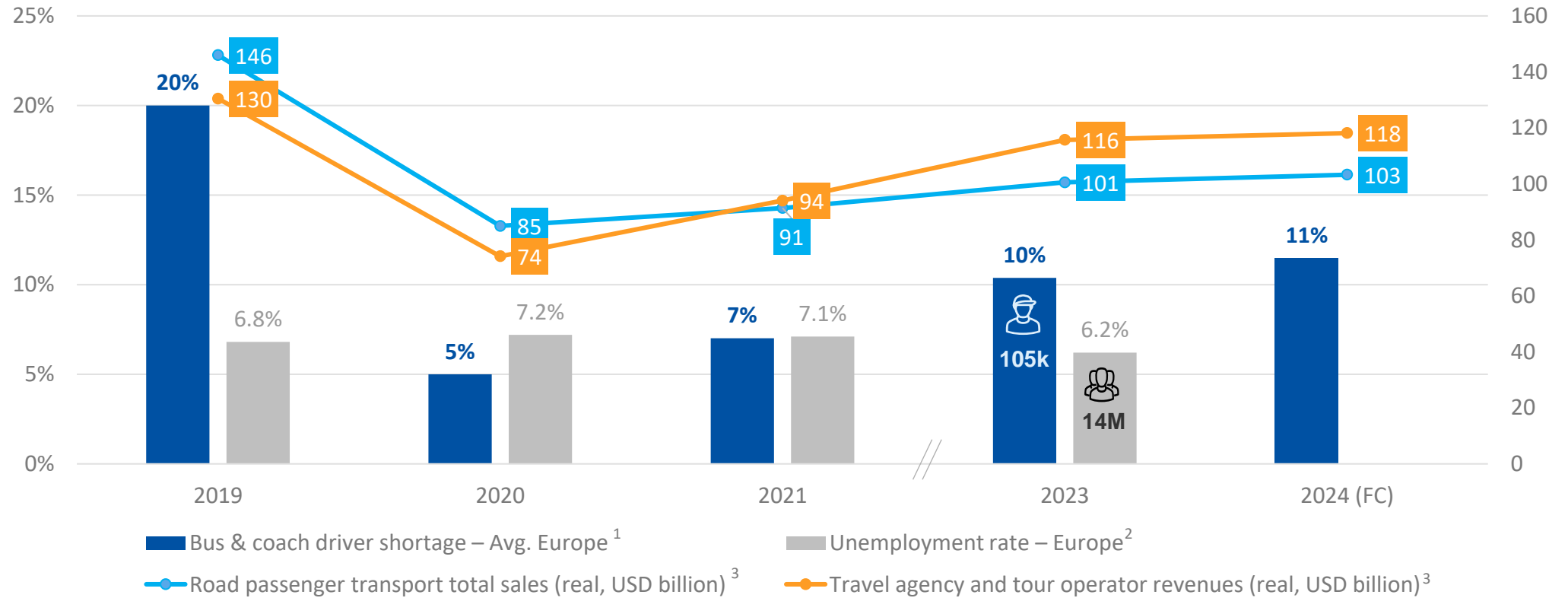
% of unfilled driver positions in 2023 | Number of unfilled driver positions in 2023²



1. In 2021, IRU's study was carried out in Q4 2021. The 2023 survey was conducted in Q1 2023. 2. Unfilled bus and coach driver jobs calculated based on the total number of bus and coach drivers in each country (Eurostat 2021), and the share of unfilled positions reported by road passenger transport operators (IRU survey, CPT UK for the United Kingdom).

Post-COVID, shortages are growing along with rising passenger transport demand

Bus and coach driver shortages and revenues (USD billion)



Gender balance

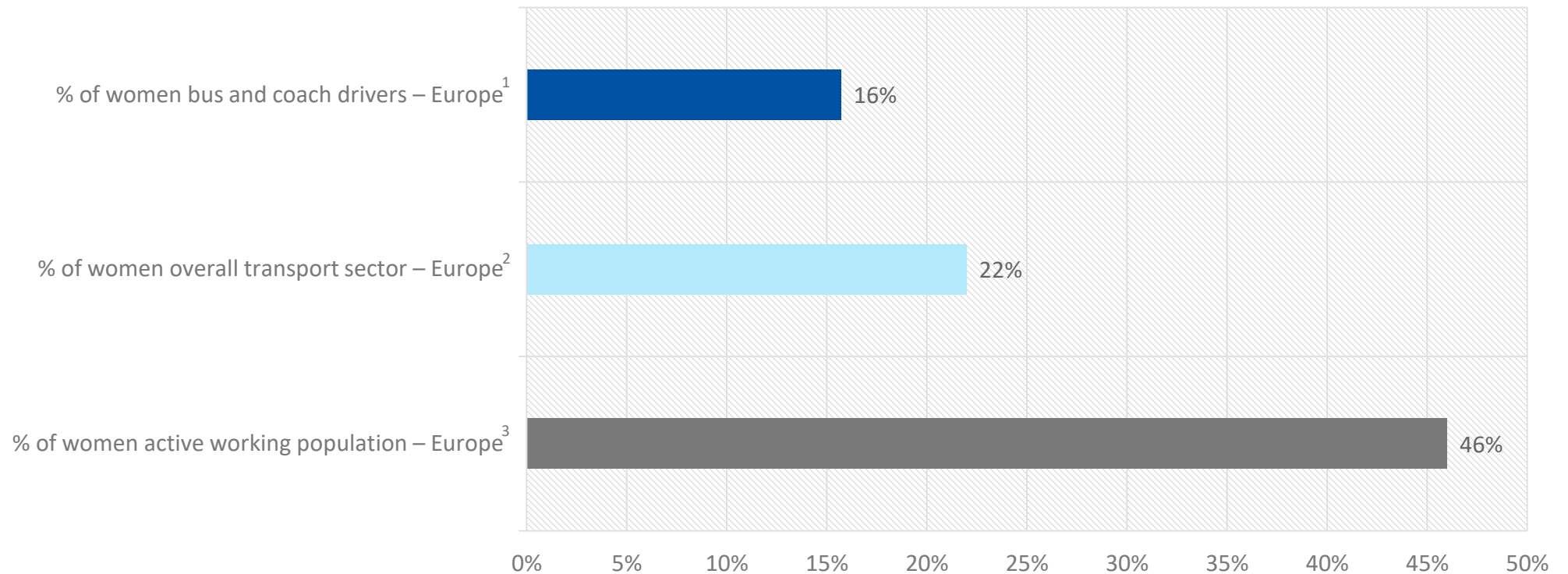
Less than 16% of bus and coach drivers are women

France has the highest share of women drivers (25%), which is very close to the overall transport industry benchmark (22%).

The Czech Republic has the lowest share of women drivers at 8%, despite women occupying 24% of total transport jobs.

Female bus and coach driver representation far below overall transport industry benchmark

Gender distribution in 2023



Sources: 1. IRU Survey 2023. 2. ILO 2022 – Economic activity = Transportation and storage 2022 (EU-27 + Norway, Switzerland). 3. ILO 2022 (EU-27 + Norway, Switzerland).

Share of non-EU drivers

Only 5% of bus and coach drivers in the EU are non-EU nationals

Europe has an ageing working population.

Facilitating the access of non-EU drivers to the bus and coach profession in Europe would be a means to cover the driver gap.

5%

Age distribution

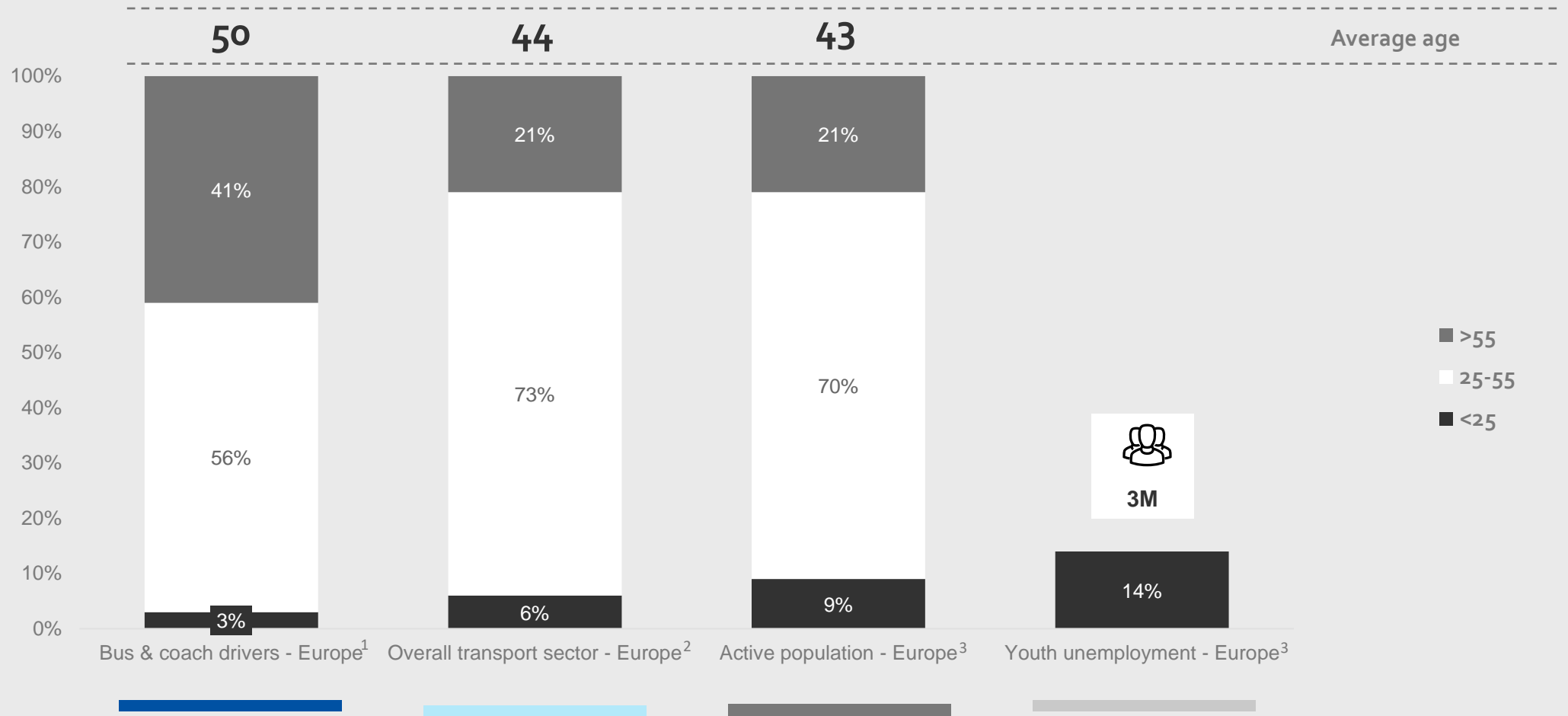
Only 3% of bus and coach drivers are under 25 years old

The Netherlands has the highest representation of young drivers at 6%, which is still very low, especially compared to the share of young people in the transport sector (9%) and the overall working population (16%).

Italy has the lowest share of drivers below 25 (1%).



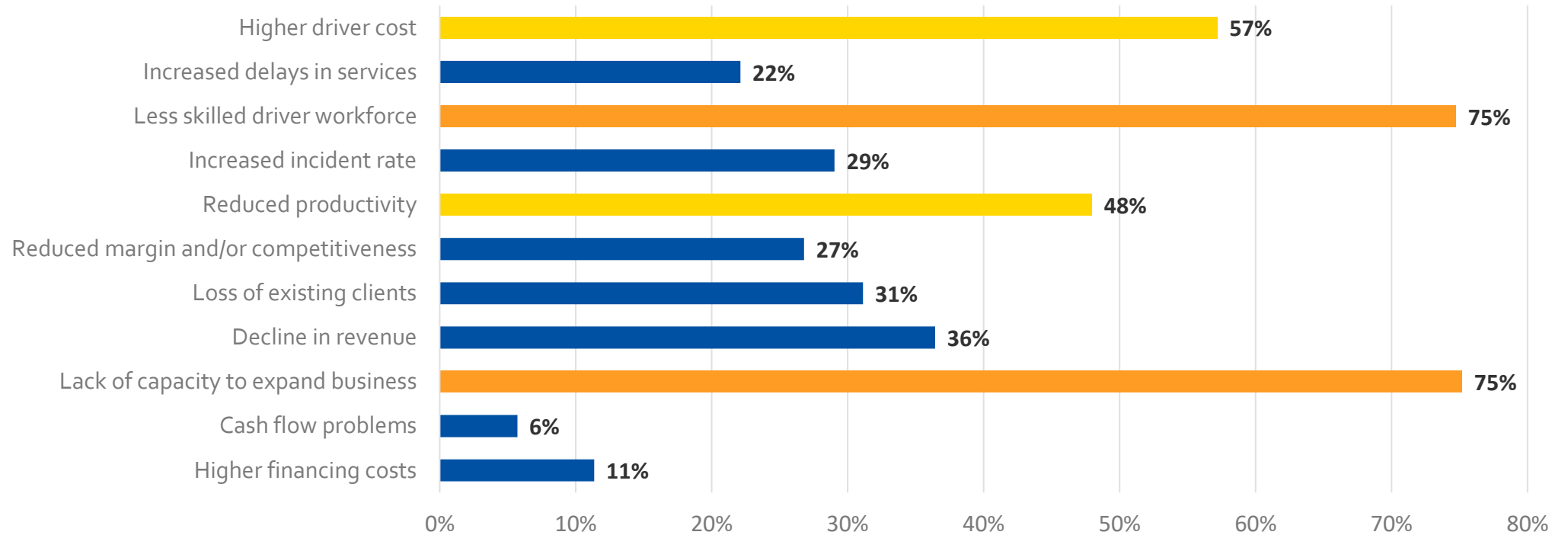
Age distribution – 2023



Driver shortages are preventing companies from expanding their capacity and recruiting skilled drivers

The impact of driver shortages on bus and coach transport companies

(% companies selecting each listed impact)



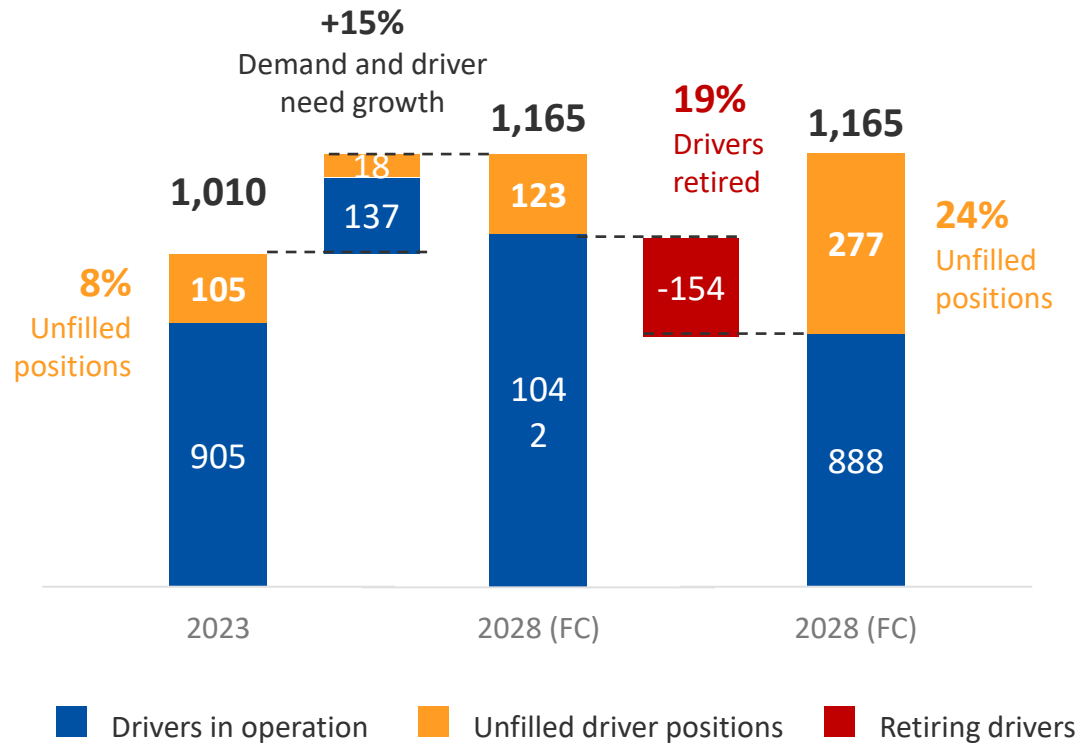
Driver shortage forecast 2028

By 2028, over 275,000 bus and
coach driver jobs could
be unfilled in Europe



Driver shortage forecast 2028

Total bus and coach drivers needed (thousands)



Forecasting model methodology:

- **More drivers needed:** Based on passenger ground transport revenues (real) growth, demand for road passenger transport services will increase at the same rate.
- **Retiring drivers:** We assume that drivers over 55 years old have the same distribution by age as the total labour force and drivers retire at 65 years old (slightly higher or lower in some countries). Two other scenarios were modelled (retirement at the minimum legal age, and retirement at the average age of retirement of the workforce), with similar results in terms of driver shortages.
- **Driver productivity** (level of service provided by the driver per unit of time) and the **level of attractiveness of the profession** remain the same.

4.

Methodology and definitions

IRU's driver shortage survey was shared with IRU members for dissemination to bus and coach companies.

The 2023 results were collected between February and April 2023, and **290 companies from seven European countries** answered the questionnaire.

For each topic (e.g. percentage of women drivers, young and old drivers, etc), the results show that the average, weighted by each company's number of drivers, and the country's weight in terms of bus and coach drivers compared with the total number of European drivers.

For each country, the results are validated with national bus and coach associations to ensure that the sample of respondents is representative of the market.

They also provide context information to better interpret the results, including the existing barriers to attract and retain drivers, actions needed and best practices.

Share of unfilled driver positions: are based on the answers to the questions "How many drivers do you currently employ?" and "How many unfilled driver positions do you currently have?".

The 2024 forecast is based on the respondents' own forecasts (answers

to the question "Could you please indicate: 1) what would be the ideal total size of your driver workforce next year? (Considering your business needs and growth expectations.) 2) Out of this total, how many driver positions do you expect to remain unfilled due to the shortage of drivers?").

Number of unfilled driver positions: Based on the total number of bus and coach drivers in each country (Eurostat) and the percentage of unfilled driver positions (the number of drivers is considered to correspond to the driver positions that are filled).

1. For European region. 2. For Eurasian region.

The 2028 bus and coach driver shortage forecast (FC) is based on driver shortages in 2021 and total sales (real) of travel agencies, tour operators, reservation services and related activities available on Information Handling Services.

The following assumptions were made:

- Rate of new drivers between 2023–2028 remains the same as in 2023
- The productivity of drivers remains the same as in 2023

- Drivers are assumed to retire at 65 years old. In some countries, the minimum retirement age is 65 but many drivers retire earlier. In other countries, the minimum legal age to retire is lower but many drivers stay beyond the retirement age
- Drivers over 55 are assumed to have the same distribution by age than the total labour force

The economically active population (also called the labour force) is the sum of people who are employed or unemployed.

The youth unemployment rate is the number of unemployed people (aged from 15 to 24 years old) as a percentage of the economically active population (the total number of people employed and unemployed equals the labour force).

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Intelligence Briefing.

Other related IRU Intelligence Briefings

Available for IRU members

- [The bus and coach driver profession in Europe – access and attractiveness 2022: Full version](#)
- [Driver Shortage Global Report 2022: Full version](#)

Available for non-members

- [The bus and coach driver profession in Europe access and attractiveness 2022: Executive Summary](#)
- [Driver Shortage European Report 2022: Full version](#)
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About IRU

IRU is the world road transport organisation. We represent the entire industry – bus, coach, truck and taxi, and drive the sustainable mobility of people and goods worldwide.

As the voice of more than 3.5 million companies operating mobility and logistics services in over 100 countries, we lead solutions to help the world move better. IRU's work supports trade, economic growth, jobs, safety, the environment and communities.

At the heart of IRU are millions of journeys across the globe every day: people and goods moving to where they need to be, in buses, coaches, taxis or trucks, for all, or even just a small part, of their journey.

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