



Intelligence Briefing

The bus and coach driver profession in Europe: access and attractiveness

PASSENGER – EXECUTIVE SUMMARY

November 2022

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A more accessible and attractive bus and coach driver profession

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

Shortages are affecting passenger transport operations in countries all over the world, harming mobility networks and the people, communities and economies that depend on them.

But there are solutions.

This report looks at the longer term view of shortages, the driver profession, and solutions implemented to fix the problem in the passenger transport sector.

It follows on from IRU's annual driver shortage survey, and has a companion report for goods transport. Future IRU reports will continue to assess the situation.

Introduction

In 2021, there were 12,000 unfilled bus and coach driver positions, among the countries studied.

Demand for drivers increased continuously (+43%) between January and September 2022.

The bus and coach driver shortage is expected to significantly worsen in 2026, with a multiplier effect of up to nine in the case of Spain.

Demand is expected to continue growing by 20% in the coming years, as total sales from travel agencies, tour operators, reservation services and related activities progressively return to pre-pandemic levels.

If the shortage persists, the sector will also seriously hamper its ability to advance the transition from private vehicles to collective modes of transport and meet its decarbonisation objectives.

The bus and coach driver shortage is forecasted to be significantly worse in 2026.

Accessing the bus and coach driver profession is challenging.

Minimum age to access the profession varies across Europe.

Furthermore, it is costly to become a bus or coach driver due to high licence costs. For example, in Germany, it costs EUR 9,000, on average, to obtain a licence.

But there are opportunities to improve access to the profession.

The ongoing revision of the EU Driving Licence Directive offers an opportunity to set the minimum age for all professional drivers at 18.

Furthermore, the EU has a system in place whereby professional drivers with a licence (D1, D1E, D or DE) acquired after 10 August 2009 and hired by a company established in an EU Member State can obtain their licence by simply following the initial and continuous training.

Financial support from governments and/or transport operators is needed to mitigate licence costs and attract new drivers, including young people, women, qualified foreign drivers and other professionals.

The average age of bus and coach drivers is higher than that of the entire transport sector and working population, with a significant gap in countries such as Denmark (+13 years) and Germany (+8 years).

It is essential to attract new drivers and reduce the average age of the profession to structurally address driver shortages.

The share of young bus and coach drivers is low – less than 5%, among the countries analysed. In Spain and Sweden, where youth unemployment rates are 30 % and 24%, respectively, the bus and coach driver profession offers an opportunity to reduce unemployment while increasing the number of essential workers.

Despite high levels of youth unemployment, there is a very low share of young bus and coach drivers among the countries studied (5%).

Areas of opportunity to reduce the bus and coach driver shortage:

- Offer potential bridges and conversion opportunities to women, who make up around 20% of the transport sector in all the countries studied, except in Romania. Women are more interested in the bus and coach driver profession. The share of female drivers is higher for passenger than goods transport.
- Remove barriers to access for young people by lowering the minimum driving age to 18, and setting the minimum age for training at 17. Attracting more young people would reduce current and forecasted shortages without undermining safety or performance. Truck drivers aged 25 or younger have similar safety performances than the overall truck driver population.
- Facilitate access to the bus and coach driver profession through a harmonised EU framework.

Transport operators and national associations are implementing solutions to ease access to the bus and coach driver profession.

National associations, such as Germany's BDO, are calling for a lowering of the minimum age for bus drivers to discourage people from seeking work in other sectors.

CONFEBUS, Spain's national association, has asked the Minister of Transport to develop an official vocational training programme for young people and to explore how the CPC can be partially taken online.

Some operators have launched academies to train and recruit future drivers. In France, Transdev has launched an academy which offers 4-to-6-week training courses. Transdev funds the whole comprehensive programme, which results in trainees obtaining a nationally recognised licence.

Others are creating flexible training courses. For example, UCplus is a Danish driver's education programme that accepts individuals who are not fluent in Danish. Students following the programme learn Danish and acquire the skills needed to become professional drivers.

In the UK, National Express's Driver Training Academy offers young recruits the opportunity to obtain their PCV licence along with their CPC training.

In addition to mandatory training, drivers working for the French company Keolis benefit from a range of complementary training courses. In particular, as they are in direct contact with passengers, they receive customer service training.

Driver shortage

**12,000 bus and coach driver jobs
were unfilled in 2021**

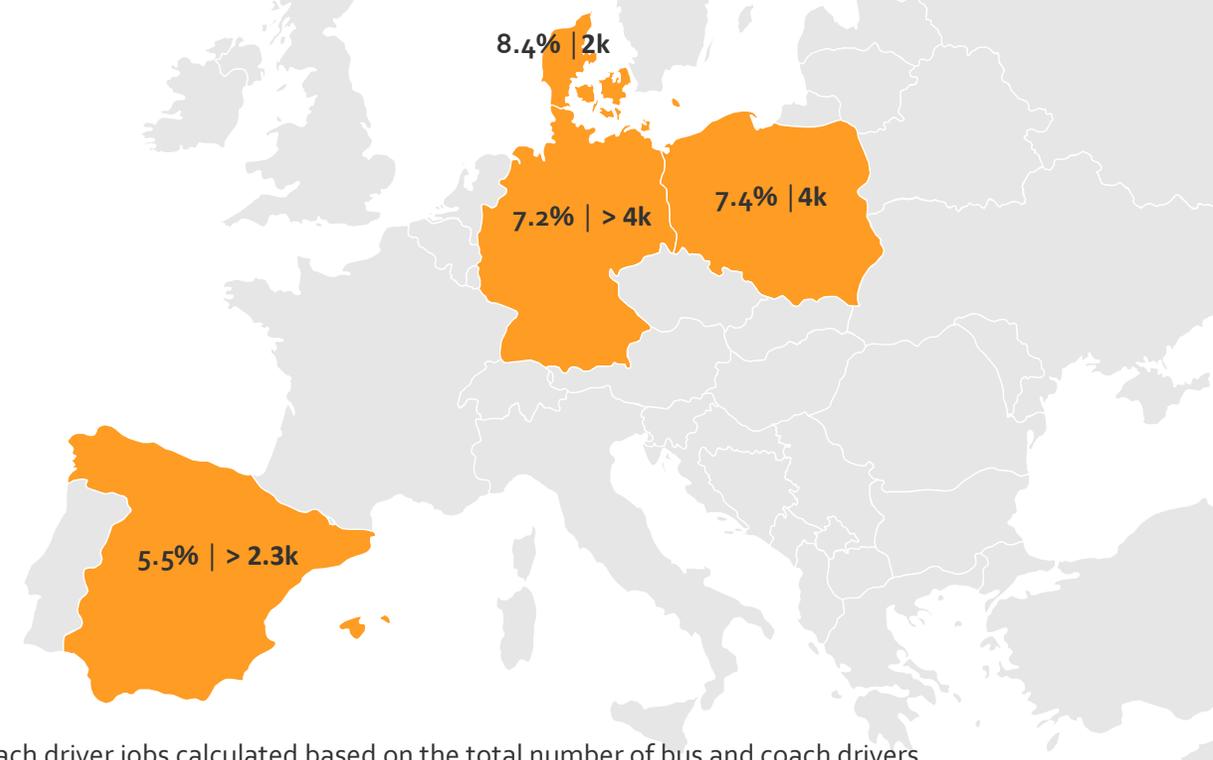
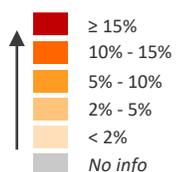
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Bus and coach driver shortage forecasted to grow by 23% in 2022

In 2021, over 12,000 positions were vacant in the countries studied.

The shortage is forecasted to increase by 23% in 2022, reaching 8% of total bus and passenger driver jobs.

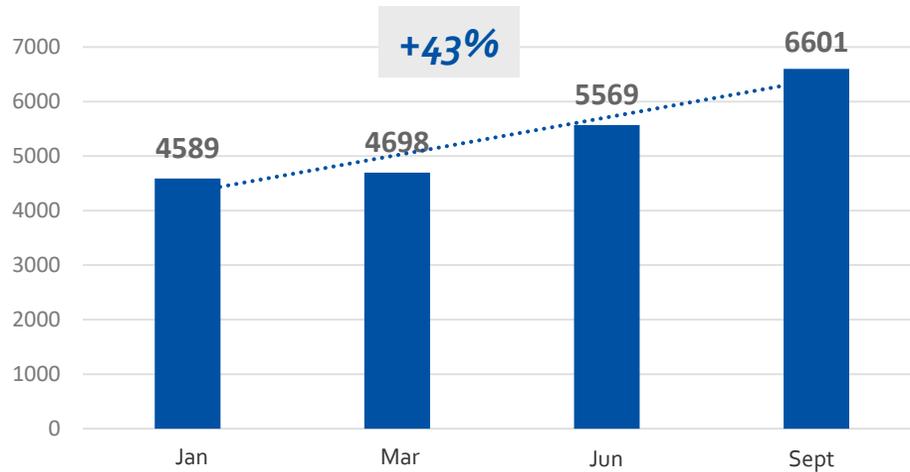
% of unfilled bus and coach driver driver positions 2021



Source: IRU national road transport associations and CNR; Unfilled bus and coach driver jobs calculated based on the total number of bus and coach drivers in each country, and the share of vacant positions reported by road passenger transport companies (more details in the methodology section of the [Driver Shortage European Report 2022](#)).

Demand for drivers is continuously increasing

Bus and coach driver open positions (from January to September 2022)



Source: Recruitment agencies and transport operators.

- Demand for drivers increased by 43% between January and September 2022, among the countries studied.
- In September 2022, the main recruitment websites/platforms registered a total of 6,601 open positions, including 1,677 vacancies in Germany.
- Passenger transport is returning to pre-pandemic levels, with revenues driven by the recovery of the tourism sector.

Driver shortage

**100,000 bus and coach driver
jobs will be unfilled in 2026**

Scope of countries: Denmark, Germany, Poland and Spain.

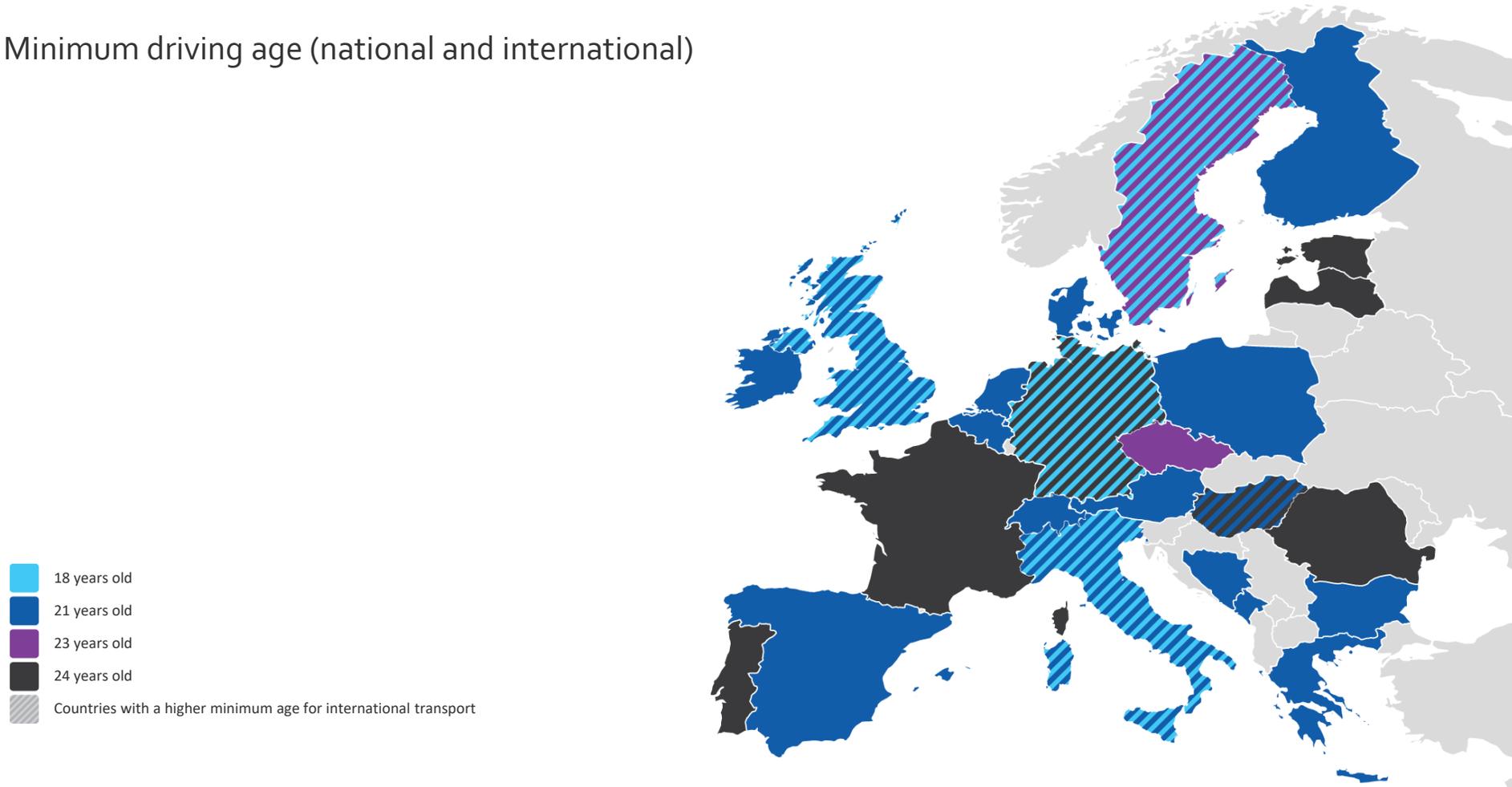
Sources: IRU and IHS Markit.

Calculations based on:

- Revenue (real) growth of travel agencies, tour operators, reservation services and related activities.
- Drivers currently above 55 will retire by 2026.
- Driver productivity remains the same. Driver productivity is the level of service provided by the driver per unit of time

Minimum age to access the profession varies across Europe

Minimum driving age (national and international)

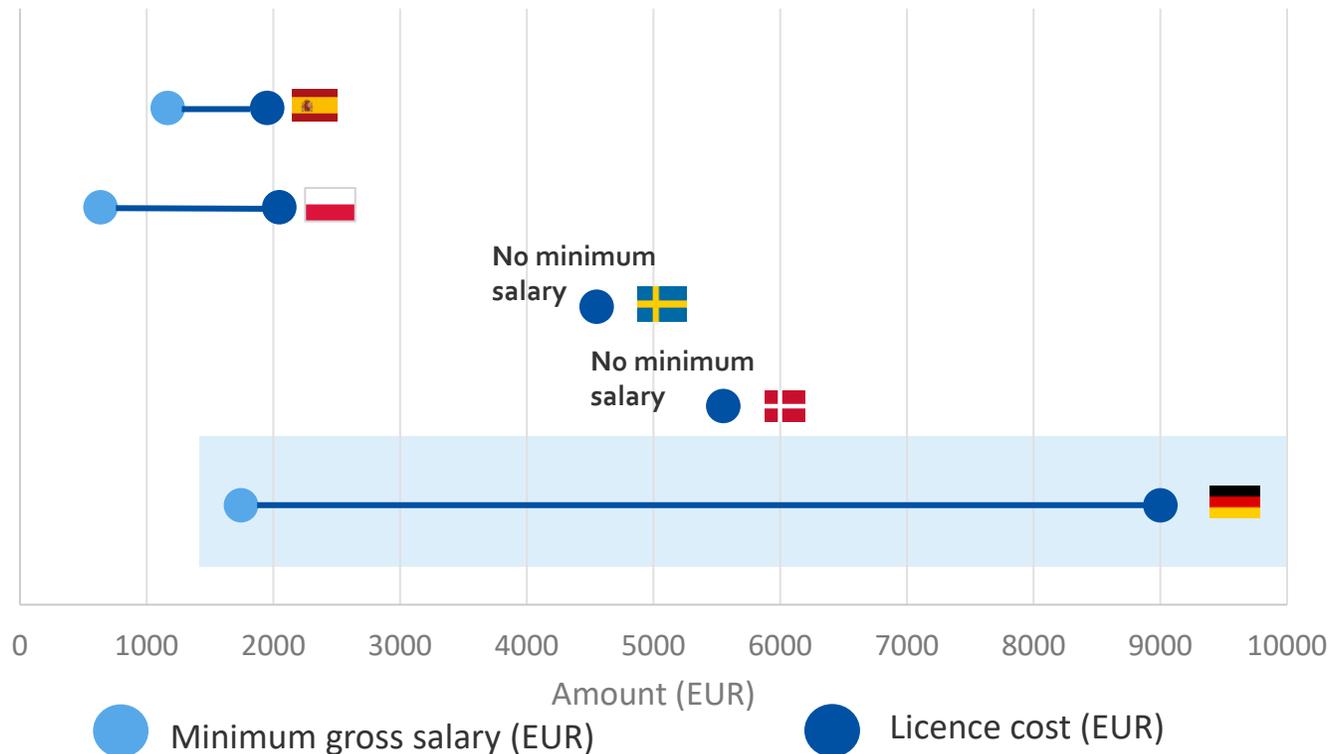


Source: [Getting more young drivers behind the wheel - IRU](#)

Note: Minimum age may vary within a country, depending on local regulations, exemptions and licence rules – for example, minimum age may differ based on route distance, international vs domestic routes, and the type of certification held.

High licence costs make it costly to become a bus and coach driver

Minimum and legal gross salary¹ versus cost of licence²



- Access to the profession and, in particular, high licence costs remain an important barrier to entry.
- In Germany, it is very expensive to become a bus and coach driver, costing EUR 9,000 on average, which is a much higher than the minimum gross salary.
- In Spain, the cost of obtaining a licence is closely aligned with the minimum gross salary, showing that, on their own, lower licence costs are not necessarily enough to attract drivers.

Average licence cost³ = EUR 4,620

Sources: 1. Eurostat 2022; 2. IRU national road transport associations; 3. Countries featured on the graph.

Definitions

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

Bus and coach driver shortage forecast in 2026: This forecast is based on the driver shortage situation in 2021 and total sales (real) of travel agencies, tour operators, reservation services and related activities available on IHS. The following assumptions were made:

- *The rate of new drivers between 2021-2026 remains the same as in 2021.*
- *The productivity of drivers remains the same as in 2021.*
- *Drivers who are currently older than 55 will retire by 2026.*

The average gross salary of drivers: Monthly gross salary, including bonuses and excluding travel allowances.

National minimum and legal gross salary: The hourly or monthly wage below which it is forbidden to pay an employee, regardless of the form of remuneration (time, performance, task, piecework, commission or tip).

PLI: The price level index, abbreviated as PLI, expresses the price level of a given country relative to another (or relative to a group of countries like the European Union), by dividing the Purchasing power parities (PPPs) by the current nominal exchange rate.

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

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The full report is available to IRU members. Please contact us at press@iru.org for more information.



Intelligence Briefing ■

About IRU

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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 planet 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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