

Concessionary Travel

Statistics: Notes and Definitions



Department
for Transport

Notes and Definitions

The Department for Transport (DfT) statistical release Bus Statistics: *Concessionary Travel in England: 2012/13* presents figures relating to free bus travel for older and disabled people, as well as concessions on other transport modes and concessions for others, including young people.

This document provides explanatory information relating to concessionary travel policy in England, the data collection and analysis methodologies and notes relating to the sources and robustness of specific data tables in the release.

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DfT carries out an annual Concessionary Travel Survey (CT Survey) of Travel Concession Authorities (TCAs). The latest release is based on surveys undertaken in summer 2013 with data relating to financial year 2012/13, although some information, such as discretionary enhancements, relate to 2013/14.

The latest data tables from the CT Survey are labelled **BUS08XX** and can be found here: <https://www.gov.uk/government/organisations/department-for-transport/series/bus-statistics>

1. Concessionary Travel in England: background and history

A statutory bus concession for older and disabled people has been in place since 2001. This initially provided for a minimum half-fare concession for older and disabled people travelling on buses within their local authority of residence, extended to a full fare (i.e. free) concession in 2006. In 2008, the concession was extended further to cover free local bus travel between 0930 and 2300 to older and disabled people anywhere in England. This statutory concession is referred to as the English National Concessionary Travel Scheme (ENCTS).

At local-level, concessionary travel schemes are administered by Travel Concession Authorities (TCAs). TCAs correspond to upper-tier local authorities - county councils, unitary authorities and in the six metropolitan areas, Passenger Transport Executives (PTEs) or Integrated Transport

Authorities (ITAs)¹. Prior to 2011, TCAs were lower tier local authorities (e.g. district councils), but moved to upper tier (e.g. county councils) in April 2011.

TCAs are required by law to reimburse bus operators for concessionary journeys made under the ENCTS which start within their boundaries, **regardless of whether the concessionary passenger making the journey is resident in their area**. Some TCAs offer additional discretionary concessions for their residents, over and above the ENCTS. These may include free or reduced travel outside the statutory time period or on other transport modes. Concessions for other groups, including young or unemployed people are non-statutory, but are also offered in some areas.

In London, the statutory concession for older and disabled London residents also covers off-peak travel on the whole London Local Transport Network, including tram and underground travel. The scheme is administered by London Councils, on behalf of the 32 London Boroughs.

TCAs are required to reimburse bus operators for carrying concessionary passengers. DfT publish guidance to assist with negotiating and calculating reimbursement:

https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/4221/busoperators-2012-13.doc

Pass eligibility

From 2002 to 2010, all those aged 60 years and over were eligible for a concessionary travel pass. Since April 2010, the eligibility age has been tied to the State Pension age for women. For women, the age of concessionary pass eligibility is their pensionable age; for men, the age of eligibility is the pensionable age of a woman born on the same day. The pensionable age for women is rising, to reach 65 by 2018 and 66 for both men and women by 2020. The eligibility age for concessionary travel is rising in line with these changes.

Disabled people of any age are eligible for a pass if they meet the eligibility criteria. These criteria are described in DfT's Guidance to TCAs:

assets.dft.gov.uk/publications/guidance-for-travel-concession-authorities-on-the-england-national-concessionary-travel-scheme/travelconcession.pdf

TCAs may also offer discretionary passes to those who do not meet the statutory age or disability.

¹ In the six metropolitan areas outside London, the scheme is administered by Tyne and Wear PTE (Nexus), Greater Manchester PTE (Transport for Greater Manchester), South Yorkshire PTE, West Yorkshire PTE (Metro), West Midlands PTE (Centro) and Merseyside PTE (Merseytravel).

Key events in Concessionary Travel

Pre-1985	Ad-hoc arrangements for concessionary travel available at local authority discretion in England.
1985	Buses de-regulated outside London. Under the Transport Act 1985 Travel Concession Authorities are able to make concessions available on operator-run services.
1999	Greater London Authority Act 1999 guarantees concessionary travel in London.
2000	Statutory local half-fare minimum concession on buses for eligible older and disabled people through the Transport Act 2000 (<i>effective 2001</i>).
2002	Age equalisation. Pass eligibility extended to men aged 60 to 64, harmonising age threshold with women.
1 April 2006	Statutory minimum travel concession increased to free local off-peak bus travel.
1 April 2008	Statutory minimum increased to free national off-peak travel on local buses in England.
1 April 2009	Secondary legislation clarifies services eligible for the statutory concession.
6 April 2010	Start of gradual realignment of the statutory concession to pensionable age.
1 April 2011	Travel Concession Authorities moved to upper tier to manage statutory and discretionary concessions to bring about economies of scale.

2. The Concessionary Travel Survey

The Concessionary Travel Survey (CT Survey) is an annual data collection by DfT, to collect information from Travel Concession Authorities (TCAs). The survey is sent to the 89 TCAs outside London and to London Councils. The 2013 Survey ran from June to August 2013, collecting outturn data for financial year 2012/13.

The 2012/13 outturn figures replace the forecasts that were published in the 2012 statistical release. The method of forecasting varied between TCAs and the resulting figures were not considered consistent between TCAs and did not justify the significant burden that providing these data placed on TCAs. As a result, following a consultation of data suppliers and users, forecasts were removed from the survey this year.

The survey includes questions relating to expenditure, pass numbers, concessionary journeys, reimbursement and discretionary concessions. TCAs are asked to report outturn for the most recent financial year.

A copy of the survey questionnaires can be found here:

assets.dft.gov.uk/statistics/series/buses/concessionary-travel-survey-questionnaire.pdf

Response rates

Responses were received for 80 TCAs in 2012 and 88 in 2013, although not all respondents completed all the questions. Table 1 summarises response rates for the different respondent types for 2012 and 2013:

Table 1: Summary of response rates for surveys run in 2012 and 2013

TCA type	Number of TCAs surveyed	Responses received	
		2012	2013
London Councils	1	1 (100%)	1 (100%)
Metropolitan areas	6	6 (100%)	6 (100%)
Non-metropolitan areas	83	73 (88%)	81 (98%)
All TCAs	90	80 (89%)	88 (98%)

Data analysis and imputation

The figures presented in tables BUS0810 to BUS0830 are national-level totals, broken down by area type (metropolitan/non-metropolitan areas). They are derived by aggregating figures for individual TCAs. Where figures were missing, due to question or survey non-response, they were imputed. Where possible, figures from a previous year have been used as a starting point for imputation and national-level growth rates have been applied to get an estimate for the missing year. The same principle was used if figures were missing from the 2013 survey but is available in the 2012 survey. Where this was not possible, data was imputed using other data sources or by applying national assumptions derived from the directly reported figures.

Further details on the imputation methods used and the proportions of imputed data in the totals are given in the “Notes to tables” section below.

Revisions

Figures for previous years are sometimes revised. These are marked as ‘r’ in the published tables. Revisions take place for a number of reasons:

- Improvements to the methodology for imputing missing data.
- Errors identified in previous survey responses.
- Improving earlier imputations with directly reported data for later years.

Revisions to data for previous years made as part of the 2013 survey analysis typically resulted in minor changes to national totals.

3. Notes to tables

This section sets out specific information relevant to data published in the tables, including definitions, data sources and data quality issues relevant to the interpretation of the figures.

Expenditure on the ENCTS as a percentage of total expenditure on concessionary travel (table [BUS0810](#))

Data source. This table relates to the total expenditure on concessionary travel, including the statutory concession, discretionary concessions, reimbursement of operators and admin costs such as pass production and TCA staff. The CT Survey asks TCAs to apportion their total expenditure between the statutory ENCTS scheme and discretionary concessions. The total and statutory expenditure is aggregated by area type to derive the percentage of statutory expenditure presented in table BUS0810.

Note that in London, whilst the statutory minimum concession for London residents covers free travel on the **whole London Local Transport Network**, the figure reported in table BUS0810 for statutory expenditure **relates only to concessions on buses** and excludes the other statutory provision in London.

Imputation. Missing figures for **total** expenditure have been imputed using finance figures collected by the Department for Communities and Local Government (DCLG) as part of the Revenue Outturn and Revenue Account Budget data collections². To apportion the total between statutory and discretionary expenditure, a national level assumption based on the type of discretions offered in the missing TCA has been applied. Around 2 per cent of total expenditure was imputed and 4 per cent of statutory expenditure.

Data quality issues. TCAs reported a number of caveats when supplying the split between statutory and discretionary expenditure, most commonly that expenditure on some discretionary enhancements, such as pre-0930 travel, could not be separated from the statutory expenditure. These issues are unlikely to have a substantial effect on the overall percentages reported in table BUS0810, but year-on-year changes of a few percentage points are unlikely to be robust.

Pass numbers (tables [BUS0820](#) and [BUS0821](#))

Data source. TCAs were asked to report the number of older and disabled concessionary passes in the authority. For most TCAs, passes are only available for older and disabled people meeting the statutory eligibility criteria, but a small number offer discretionary passes to other older and disabled people and these discretionary passes have been included in the totals reported here.

Eligible older population. To calculate the “passes per hundred eligible older people” measures, we use the latest older population as reported by the Office for National Statistics, based on the 2011 Census³. As the eligibility age is currently rising, it is not possible to get an exact match to the eligible population. The eligibility age was 60 years old at the start of 2010/11, 60.5 years old at the end of 2010/2011, 61 years at the end of 2011/12 and 61.5 years at the end of 2012/13. As

² www.communities.gov.uk/localgovernment/localregional/localgovernmentfinance/statistics/revenueexpenditure/

³ www.ons.gov.uk/ons/rel/snpp/sub-national-population-projections/Interim-2011-based/stb-2011-based-snpp.html

the pass numbers supplied by the TCAs were an average across the whole financial year, the "eligible older population" is approximated to be the mid-point age in each of those years, i.e. people aged at least 60.25 at mid-2010 (for 2010/11), 60.75 at mid-2011 (for 2011/12) and 61.25 at mid-2012 (for 2012/13), using the latest Census-based population data from the Office for National Statistics.

Imputation. Missing pass numbers for older people were imputed using the eligible older population in that TCA and applying a national level assumption for the number of passes per head. Missing disabled passes were imputed by applying national level assumptions for the proportion of disabled passes compared to older passes. Around 2 per cent of the total passes were imputed.

Data quality issues. Two main caveats apply to the data for the number of passes:

- i) TCAs have different policies on pass entitlement for those who qualify for a pass on both age and disability grounds.
- ii) Some TCAs reported that pass numbers from their database may include some inactive passes, such as those for deceased people or those who have moved out of the area. These inactive passes are unlikely substantially affect on the **overall** area-type totals in table BUS0820 and BUS0821. However, the data for individual TCAs in should be treated with caution, particularly where the number of older passes exceeds the size of the eligible population, implying that some inactive passes may have been included. **In addition, it should be noted that “passes” is not necessarily an accurate proxy for “pass holders”.**

Although these caveats should be considered when using the **overall area-type totals** in BUS0820 and BUS0821, they will particularly limit the robustness of the **TCA-level** data. Where TCAs supplied this data, it has been presented but given the issues above, it **should not be treated as Official Statistics and should be used with these limitations in mind.**

Concessionary journeys and journeys per pass (table [BUS0821](#))

Data source. The journeys figures presented in table BUS0821 refer to all concessionary journeys by older and disabled pass holders, **including discretionary journeys** made under locally available concessions, such as pre-0930 or post-2300 journeys.

Imputation. Where journey figures were missing, data from the DfT's annual survey of Public Service Vehicle (PSV) operators was used. Around 3 per cent of the total journeys were imputed.

Data quality issues. The “journeys per pass” measures were derived by dividing total journeys by total passes. In practice, concessionary journeys are unlikely to be evenly distributed across all passes. In addition, pass holders resident in one area type may be making passenger journeys in another area type – e.g. journeys by non-London pass holders form part of London's total journeys, but it was not possible to disaggregate these.

Reimbursement costs (table [BUS0830](#))

Data source. Table BUS0830 includes all reimbursement paid by TCAs to bus operators for

concessionary journeys by older and disabled people. This includes reimbursement for **discretionary journeys** made under locally available concessions, such as pre-0930 or post-2300 journeys. Figures in BUS0830a are not adjusted for inflation; figures in BUS0830b are adjusted for inflation to be in 2012/13 prices using the HM Treasury GDP Deflator, as at 27 June 2013⁴.

Imputation. Where reimbursement figures were missing, they were imputed by applying national-level assumptions for reimbursement costs per journey. Around 2 per cent of the total reimbursement costs were imputed.

Reimbursement methods (table [BUS0831](#))

Data source. DfT publishes guidance to assist TCAs in negotiating and calculating their reimbursement to bus operators. As part of the CT Survey, TCAs are asked which, if any, elements of the guidance they are using.

DfT Guidance. A copy of the guidance, including descriptions of the individual elements of guidance listed in Table BUS0831, can be found here:

Fixed term arrangement. This refers to an agreement of a fixed sum for a fixed period of time, with any of the authority's bus operators.

Imputation. Out of the 90 TCAs surveyed, 4 did not respond to this question. No imputation was possible for these missing answers.

Discretionary concessions (tables [BUS0840 to BUS0842](#))

Data source. Information about available discretionary concessions is based on answers received in the CT Survey and information gathered from TCA and bus operator websites to complete missing answers or validate answers received. Note that a “Yes” does not mean that the discretion is offered to all older and disabled people, or to all areas in the TCA. For example, in some TCAs, concessions on pre-0930 travel are only offered to disabled people, or those who do not have a frequent post-0930 bus service nearby.

Data quality. The categories of discretions listed in the survey question changed slightly between 2011 and 2012, which led to some changes in reporting. The largest effect of this was on the reporting of Park and Ride services, which appear under “Other concessions” in tables BUS0840 and BUS0841. There was an apparent under-reporting of Park & Ride concessions in the 2011 survey meaning that “Other concessions” for 2010/11 are not comparable with later years. A dotted line is shown on BUS0840 to emphasize this.

In compiling tables BUS0840 to BUS0842 we have relied on TCA and bus operator websites to supplement information received in the CT Survey. Inevitably, this carries a risk of overlooking or misinterpreting information, particularly when looking for information about concessions which operated in previous years. **Any corrections tables BUS0840 to BUS0842 can be reported to us via bus.statistics@dft.gsi.gov.uk.** We will aim to correct large errors where reasonable and revise the tables for next year's release.

⁴ www.hm-treasury.gov.uk/data_gdp_fig.htm

4. Other data sources on concessionary travel and buses

- DfT's **National Travel Survey (NTS)** collects some information about concessionary travel, including pass take-up rates by area and gender as well as more general information on personal travel patterns amongst older people. Data from the NTS can be accessed here: <https://www.gov.uk/government/organisations/department-for-transport/series/national-travel-survey-statistics>
- NTS tables relating specifically to concessionary travel can be accessed here: <https://www.gov.uk/government/statistical-data-sets/nts06-age-gender-and-modal-breakdown#table-nts0620>
- A time series back to 2007/08 of all concessionary bus journeys, including youth concessionary journeys, can be accessed here: <https://www.gov.uk/government/statistical-data-sets/bus01-local-bus-passenger-journeys>
- DfT collect and publish a range of other statistics relating to **bus travel**, including passenger journeys and operator finance: <https://www.gov.uk/government/organisations/department-for-transport/series/bus-statistics>
- Data on concessionary journeys on light rail and tram systems is collected as part of DfT's **Light Rail and Tram Survey**, including concessionary journeys and reimbursement revenue by light rail system: <https://www.gov.uk/government/organisations/department-for-transport/series/light-rail-and-tram-statistics>

Comparison with other data sources

Pass take-up rates from the National Travel Survey

The National Travel Survey (NTS) is the primary source of data on personal travel patterns, based on a sample of around 19,000 people in Great Britain. As part of the survey, individuals are asked whether they hold a concessionary travel pass. Based on the 2012 NTS (the latest data available), the pass take-up rate amongst older people in England was 79 per cent of the eligible population.

In the CT Survey, TCAs reported that there were 8.8m older passes in England in 2012/13, corresponding to an apparent “take-up rate” of 78 per cent, which is broadly similar to the NTS estimate, when taking into account the imputation of some CT Survey estimates, sampling error around NTS estimates and the imprecision of the population estimates in the calculation of CT Survey take up rates. Given these caveats, the older pass data from the NTS and CT Survey are in reasonable agreement. A similar comparison for disabled passes is not possible, as only a very small number of these are recorded within the NTS sample.

Journeys

DfT's annual Survey of Public Service Vehicle (PSV) operators collects data on the number of concessionary bus journeys from a sample of operators and scales up to give national-level totals. The latest statistics for all concessionary journeys – statutory and discretionary older and disabled

and youth journeys – can be access here: <https://www.gov.uk/government/statistical-data-sets/bus01-local-bus-passenger-journeys>

For 2011/12 and 2012/13, at the national level, the journeys totals are consistent (less than 1%). The discrepancies for metropolitan and non-metropolitan areas are also small (3% and less than 1%). The difference for London (7%) is larger. The trends in the two surveys are also similar.

5. Users and uses of these statistics

Within the Department for Transport, these statistics are used to understand the impact of changes to the concessionary travel scheme and reimbursement guidance, for ministerial briefing and to answer public enquiries. Outside the Department, users include TCAs and others with an interest in concessionary travel, such as campaign groups, bus operators and specialist transport press.

Request for feedback

We welcome any feedback on these statistics, to ensure future releases best meet user needs. Feedback can be provided by email to bus.statistics@dft.gsi.gov.uk.