

Concessionary Travel Statistics: Notes and Definitions



Department
for Transport

Notes and Definitions

The Department for Transport (DfT) statistical release *Concessionary Travel Statistics: England: 2011/12 and 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.

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 2011 (relating to **financial year 2010/11**) and Summer 2012 (relating to **financial year 2011/12 and including TCA forecasts for financial year 2012/13**).

The latest data tables from the CT Survey are labelled **bus08XX** and can be found here: www.gov.uk/government/statistical-data-sets/bus08-concessionary-travel

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

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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:

www.gov.uk/government/publications/guidance-on-reimbursing-bus-operators-for-concessionary-travel

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:

<https://www.gov.uk/government/publications/guidance-for-travel-concession-authorities-on-the-england-national-concessionary-travel-scheme>

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

Key events in Concessionary Travel

Pre-1985 Ad-hoc arrangements for concessionary travel available at local authority discretion in England.

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).

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- 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 (*effective 2001*).
- 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 Councils². The 2012 Survey ran from June to September 2012, collecting outturn data for financial year 2011/12 and TCA forecasts for 2012/13. The 2011 survey ran in a similar period during 2011, collecting data for years 2010/11 and 2011/12.

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 and their forecasts for the current year.

A copy of the survey questionnaires can be found on this page:

<https://www.gov.uk/technical-guidance-for-transport-stats#concessionary-travel>

Response rates

Responses were received for 76 TCAs in 2011 and 80 in 2012, although not all respondents

² London Councils runs a number of services, including concessionary travel, across London on behalf of the separate London Boroughs

completed all the questions. Table 1 summarizes response rates for the different respondent types for 2011 and 2012:

Table 1: Summary of response rates for surveys run in 2011 and 2012

TCA type	Number of TCAs surveyed	Responses received	
		2011	2012
London Councils	1	1 (100%)	1 (100%)
Metropolitan areas	6	6 (100%)	6 (100%)
Non-metropolitan areas	83	69 (83%)	73 (88%)
All TCAs	90	76 (84%)	80 (89%)

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 2011 Survey but is available in the 2012 Survey. Where this was not possible, data was imputed using other data sources or by applying national-level 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.

In addition, a minor error was discovered in the methodology for calculating total reimbursement costs for non-metropolitan areas in 2010/11, which has been corrected as part of the revisions. The combined effect of this and the other revisions listed above is minor and does not affect the overall trends reported. Revisions to the data for 2010/11 made as part of the 2012 Survey analysis resulted in changes of less than 3 per cent to the national-level totals.

TCA forecasts

Figures provided for financial year 2012/13 are forecasts made by TCAs. TCAs may use a variety of methods to arrive at these forecasts, including modelling, simple approximate up-rating of 2011/12 figures or pro-rata up-rating of figures observed in the first few months of 2012/13. DfT has queried any particularly large year-on-year changes with TCAs to identify errors, but no other

attempt by DfT verify the forecasts has been possible.

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 collections (as used in tables bus0811 and bus0812). 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 7 per cent of total expenditure is imputed and 9 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.

Total expenditure on concessionary travel (tables [bus0811](#) and [bus0812](#))

Data source. This table presents 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 figures are as reported by local authorities to DCLG as part of the Revenue Outturn (RO) and Revenue Account (RA) data collections³. The figures reported to DCLG are for all local authorities, both upper and lower tier. Although concessionary

³ The underlying RO and RA data, including expenditure across all local authority services, is published on DCLG's website: www.gov.uk/government/organisations/department-for-communities-and-local-government/series/local-authority-revenue-expenditure-and-financing

travel is administered by upper tier authorities, some expenditure is still reported by lower tier authorities. For the purpose of tables bus0811 and bus0812, the lower tier expenditure has been included with the relevant upper tier authority.

Figures in bus0811a and bus0812a are not adjusted for inflation; figures in bus0811b and bus0812b are adjusted for inflation to be in 2011/12 prices using the HM Treasury GDP Deflator, as at September 2012⁴.

Adjustment for London. The RO expenditure figures for London for 2008/09 to 2010/11 have been adjusted to include the Special Grant paid by the Department for Transport. The Special Grant was paid to all authorities to support expansion of the concessionary travel scheme from local to national eligibility. For London, the Special Grant was paid directly to London Councils, on behalf of the London Boroughs, but as London Councils is not itself a local authority, the expenditure from the Special Grant paid to London does not appear on the DCLG returns.

Pass numbers (tables [bus0820](#), [bus0821](#) and [bus0890](#))

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 Census⁵. As the eligibility age is currently rising, it is not possible to get an exact match to the eligible population. As an approximation, the “eligible population” used here is those aged at least 61 years at mid-2011 (for 2011/12) and those aged at least 61 years at mid-2012 (for 2012/13).

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 10 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. Therefore, the numbers of disabled passes in bus0890 are not directly comparable across different TCAs.
- 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

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

⁵ www.ons.gov.uk/ons/rel/snpp/sub-national-population-projections/Interim-2011-based/stb-2011-based-snpp.html

bus0821. However, the data for individual TCAs in table bus0890 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** pass data. Where TCAs supplied this data, it has been presented in table bus0890, 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 20 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 2011/12 prices using the HM Treasury GDP Deflator, as at September 2012⁶.

Imputation. Where reimbursement figures were missing, they were imputed by applying national-level assumptions for reimbursement costs per journey. Around 10 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:

⁶ www.hm-treasury.gov.uk/data_gdp_fig.htm

www.gov.uk/government/publications/guidance-on-reimbursing-bus-operators-for-concessionary-travel

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. 9 TCAs out of the 90 surveyed 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. 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: www.gov.uk/government/organisations/department-for-transport/series/national-travel-survey-statistics
- DfT collect and publish a range of other statistics relating to **bus travel**, including passenger journeys and operator finance: www.gov.uk/government/organisations/department-for-transport/series/bus-statistics

A time series back to 2007/08 of all concessionary bus journeys, including youth concessionary journeys, is available in table bus0105, which can be accessed via the link: www.gov.uk/government/statistical-data-sets/bus01-local-bus-passenger-journeys

- 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: 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 2010 NTS (the latest data available), the pass take-up rate amongst older people in England was **77 per cent** of the eligible population.

In the CT Survey, TCAs reported that there were 9.9m older passes in England in 2011/12, corresponding to an apparent “take-up rate” of 80 per cent, which is slightly higher than that reported in NTS. The discrepancy can be accounted for by:

- The CT Survey pass figures include a small number of inactive passes, as discussed in Section 4 and therefore is likely to be an overestimate of actual pass holders.
- The NTS relies on **individuals** stating that they have a pass which may lead to some under reporting amongst those who hold a pass but use it rarely or not at all.

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 accessed here: www.gov.uk/government/statistical-data-sets/bus01-local-bus-passenger-journeys

A direct comparison with the CT Survey figures in bus0821 is not possible, as the PSV Survey figures include youth journeys, but a broad “sense-check” is possible. For 2010/11 and 2011/12, the journeys are consistent (less than 5 per cent different) for non-metropolitan areas. There are larger discrepancies for metropolitan areas and London (20 per cent and 60 per cent differences, respectively), which reflects the higher prevalence of youth concessions in these areas.

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.

For examples of feedback previously received in relation to DfT's bus statistics and changes which have been implemented as a result, please see the following report:

www.gov.uk/technical-guidance-for-transport-stats#bus-statistics