

# *Getting out and about*

Keeping bus services free and sustainable



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Age UK launched in April 2010 with the aim of improving later life for people in the UK and around the world through our information and advice, campaigns, products, training and research. Age Scotland, Age Cymru and Age NI launched at the same time. There are also more than 160 local Age UKs.

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## Summary

Bus services provide a lifeline for many older people. For those without easy access to a car, having accessible and affordable public transport is vital to leading an active and independent life.

The national bus concession means people in later life are able to reach key services, friends and family without making difficult financial choices. The concession allows older people to travel off-peak on buses anywhere in England for free. Eligibility is tied to women's State Pension age for both men and women. It is a crucial universal benefit that is greatly valued by older people.<sup>1</sup> But there is no point in having a bus concession without a bus to get on. Having free and readily available bus services go hand in hand.

Over the last year there have been significant funding cuts to bus services, which seriously affect the convenience of bus travel for older people.<sup>2</sup> There have always been inequalities in access to reliable bus services, but there is evidence that the situation is getting worse. In many cases buses are being cut without suitable alternatives being found, which will leave older people stranded.

This is about more than getting from A to B. The wider benefits of bus travel and its role in improving older people's quality of life need to be recognised in all transport policy.



*Public transport is vital  
to leading an active and  
independent life*



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This policy report is based on two recent research projects commissioned by Age UK, which show the importance of buses and concessionary travel to older people. Full copies of these research reports can be found on the Age UK website: [www.ageuk.org.uk/professional-resources-home](http://www.ageuk.org.uk/professional-resources-home)

- **Older People's Use of Concessionary Bus Travel, NatCen** The aim of this research was to provide quantitative information about the underlying factors relevant to bus pass ownership and use. The research analysed data from the National Travel Survey 2010 and an omnibus survey of 988 people in England who were eligible for a bus pass on grounds of age.
- **Just the Ticket? Understanding the wide-ranging benefits of England's concessionary fares policy, Centre for Transport and Society at the University of the West of England** The aim of this report was to set out the variety of benefits to older people's quality of life that may be derived from the national bus concession. The research is based on findings from an on-board survey of bus passengers and a series of qualitative focus groups in south-west England.



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## ***Age UK recommendations***

- 1 The national bus concession must remain free and universal.
- 2 The wider value of bus services to prevent social exclusion must be recognised by national and local government with appropriate investment in bus services.
- 3 Where private transport is not possible and the public transport system does not fully serve the needs of older people, local authorities should provide flexible alternatives, such as financial support towards community transport or taxis.
- 4 All local transport authorities must take accessibility planning for transport seriously. They have to be able to react to the needs and views of older people and promote co-operation between all potential partners to find suitable alternative service provision.

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# Bus services

**The aim is that local transport planning should be more focused on local needs.**

## Understanding policy and funding

The current national concession for bus travel was introduced in 2008. The statutory minimum concession provides free off-peak travel anywhere in England for everyone, once they reach the State Pension age for women. Off-peak bus travel is between 9.30am and 11pm, Monday to Friday, and all day at weekends and on public holidays.

In many places the bus pass has additional benefits or alternatives. This is at the discretion of the local authority. The generosity of these alternatives varies across England; from free all-day travel on all public transport in London to a simple extension of the bus concession start time to 9am in other local authority areas.

There is a commitment to the statutory minimum concession in primary legislation, which has been restated in the Comprehensive Spending Review 2010<sup>3</sup> and by the Secretary of State for Transport.<sup>4</sup>

The responsibility for planning local transport increasingly sits with local authorities, or with the integrated transport authorities in metropolitan areas. In line with the Government's principle of localism, the strategy for local public transport is to free local government from central government control.<sup>5</sup> The aim is that local transport planning should be more focused on local needs.

However, responsibility for the delivery and funding of bus services continues to cross national and local government, as well as the private and community sector. This means that co-operation and co-ordination are needed between all these sectors to improve bus services for older people.

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Public-sector subsidy for bus services comes from three main sources.

- Concessionary travel funding: national government provides funding for trips made using the national bus concession and this is reimbursed to bus operators by local authorities.
- Local authority funding: subsidy is provided for bus services on routes that are not commercially viable but are vital to the local community; and funding is provided for additional bus concession benefits determined locally.
- Bus Service Operators Grant: national government provides a grant to bus operators based on the number of kilometres they operate on registered local bus services. Originally a fuel rebate, the grant is now aimed at benefiting passengers by keeping fares low.

All of these funding streams are affected by recent and future public spending reductions. Research from the Campaign for Better Transport shows that 70 per cent of local authorities made cuts to bus provision in 2011/12 and they are concerned about further cuts in the future.<sup>6</sup> In addition, some local authorities have argued they have not been given sufficient funds from national government to reimburse bus operators for concessionary fares.<sup>7</sup> Bus operators will also see the Bus Service Operators Grant reduced by 20 per cent from 2012/13. When taken together, all these changes could have an impact on the sustainable provision of bus services.



*The bus concession  
has played its part in  
increasing the number  
of journeys on buses.*



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**The Government has been criticised for not providing strategic direction to deliver change or making sure that transport policy contributes to tackling social exclusion.**

## The value of the national bus concession

Being able to make trips on buses is important in itself. On average, older people and younger people make proportionally more trips on public transport than other age groups. The bus concession has played its part in increasing the number of journeys on buses. In 2010, 77 per cent of eligible individuals owned a concessionary pass.<sup>8</sup> Research shows that 39 per cent of pass-holders made a greater number of local journeys by bus than before they obtained the pass.<sup>9</sup>

However, the value to older people of bus services and the bus concession goes beyond a simple calculation of the number of trips they make. It is also important to determine whether this bus policy is meeting broader social outcomes. In particular, whether it improves quality of life for those on the lowest incomes and the role it plays in keeping people active in their community.

In 2003, the Social Exclusion Unit produced a report<sup>10</sup> detailing the link between transport and social exclusion. It showed how access to key services, including work, learning and healthcare, had a direct impact on life chances at all ages and can reinforce social exclusion for older people. Since then, the Government has been criticised for not providing strategic direction to deliver change or making sure that transport policy contributes to tackling social exclusion.<sup>11</sup>

Social exclusion is often referred to in terms of being cut off from the mainstream of society. It recognises that disadvantage is not just about being poor; but also about being unable to access the things in life that most of society takes for granted. This includes having close friends and regular company, stimulating activity, and easy access to important services, such as GPs, shops and post offices. Being able to get out and about makes many of these activities possible.

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**Crucially, being isolated and lonely has been shown to have a direct impact on people's health.**

Crucially, being isolated and lonely has been shown to have a direct impact on people's health. The impacts of social relationships on premature death are comparable with well-established risk factors for mortality, such as smoking, and exceed the influence of physical activity and obesity.<sup>12</sup> There is an obvious benefit to individuals here, but also to the public purse if health and social care services are not needed because people are healthier.

One of the key aims of introducing a universal national bus concession in 2008 was tackling social isolation. One of the indicators of whether the bus concession is meeting this aim is whether it is being used by older people on lower incomes.

Research commissioned by Age UK provides some evidence to suggest that there is a relationship between income and using a bus pass. For the group of older people on an annual income of below £15,000, pass ownership is 80–82 per cent. Above this income level, pass ownership decreases. There is also a higher percentage of people on lower incomes using the bus pass at least once a week, compared to those on an annual incomes over £15,000.<sup>13</sup>

While the research does not show a statistically significant relationship between income and use of the bus pass, these patterns suggest that the current policy is reaching groups that may otherwise be socially isolated.

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Research into the experience of concessionary bus users in the south-west of England suggests that the wider benefits of the concession are poorly measured and under-appreciated by policy-makers. The full value of the concession and the meaningful contribution it makes to quality of life is not being taken into consideration when evaluating the policy.<sup>14</sup>

The bus concession directly affects people's money management in the following ways.

- **Flexibility.** Increased flexibility to spread out bus trips over the day or week, rather than making as many trips in one day as possible in order to maximise the value of a 'day rider' ticket.
- **Divert funds.** The opportunity to divert funds to other activities since having a free bus pass, including 'having meals out' 'having a coffee' or 'using the money saved to travel further afield to see relatives'.
- **Getting out more.** The justification of seemingly 'trivial' trips, which may be seen as affordable by some pass-holders, but could not be justified in the absence of the free bus pass. Such trips included 'taking the bus for its own sake' and 'popping out just for a ride' – trips that are identified within existing literature as intrinsically important in preventing social exclusion and isolation.<sup>15</sup>



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**Some pass-holders reported not having to worry about making a route mistake, or getting off at the wrong stop.**

Wider benefits that have been identified relate to individuals feeling that they have choice about their transport options and can continue to be an active member of the community.

- **Preventing isolation:** encouraging self-prevention of isolation in later life, through facilitation of trips to ‘get out of the house’ and to ‘socialise with others’.
- **Greater choice:** reduced ‘perceived risk’ to pass-holders of trying out the bus. For example, some pass-holders reported not having to worry about making a route mistake, or getting off at the wrong stop, given that it is free to reboard. In addition, the interoperability of the pass meant a choice of operators for the return journey, whereas when they had paid a fare they could only use their ticket with the operator they had used for the outward journey.
- **Accessibility:** giving pass-holders the incentive to overcome the traditional barriers associated with bus travel. For example, some pass-holders reported driving to the bus stop and parking (informal park and ride), because they experienced difficulties walking to the bus stop. They claimed they would not have gone to such effort if they had had to pay. Once on the bus, many pass-holders reported benefiting from social contact with others.

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***‘I couldn’t afford to travel by bus every day before. I would have bought one ticket for one day and be done with it, but now I find myself just using it whenever. Now I am not concerned about getting my value for money.’***

(Male, 61, city)

***‘The bus is not so much about accessing somewhere as meeting people.’***

(Male, 84, village)

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***‘It’s the social side, you know. Not just meeting friends and relatives, but travelling together and having a meal you wouldn’t have afforded if you had to fork out for the bus.’***

(Female, 72, city)

***‘Now I have free bus travel, I don’t need a car. I gave it up... and all the costs and worries of it breaking down and all that.’<sup>16</sup>***

(Male, 77, town)

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- **More transport options:** introducing a more gradual transition process for giving up driving. Pass-holders were increasingly likely to have had some bus-use experience that might bode well should they need to cease driving. There was also the benefit of avoiding some of the perceived negative aspects of driving, such as driving at night.
  - **Taking part:** facilitating pass-holders’ participation in society, by facilitating regular commitment to societies and volunteering activities with zero travel cost.
  - **Enjoying travel:** the stimulation of entirely new trips, such as timed ‘bus route challenges’ and ‘bus roulette’ (arriving at the bus stop and deciding where to go on the day), which some pass-holders reported made the bus journey an entertaining and fun activity in its own right. It was reported that such trips would not to be undertaken if there was not a free fares scheme.
  - **Social connections:** encouraging the role of the bus as a mobile social space that provides access to informal support networks, social engagement and contact with the outside world.<sup>17</sup>



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## The value of sustainable bus services

All these benefits need to be considered together to understand the importance of bus services being not only free, but also widely available. This is reiterated in analysis of how older people use the bus pass.

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***Age UK's research shows clearly that access to bus services, i.e. living close to a bus stop or having a frequent service, greatly increases the likelihood of owning a bus pass and making good use of it.<sup>18</sup>***

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This shows how important a good service is to be being able to get out and about using the bus concession. As would be expected, this leads to a difference between the experience of older people living in urban and rural areas.

- Fifty-five per cent of urban residents use their pass at least once a week compared with 28 per cent of those living in rural areas.
- Despite owning a pass, one-quarter of those living in rural areas use their pass less than once a year.<sup>19</sup>

The way that car use has dictated how society operates can mean the location of services for those without access to private transport is no longer being given proper consideration. A significant percentage of people report difficulties accessing the following amenities without a car: doctor/hospital – 44 per cent; corner shop/supermarket – 23 per cent; post office – 18 per cent.<sup>20</sup> It has also been found that 6 per cent of people aged 65 and over leave their home only once a week or less.<sup>21</sup> Indeed, Age UK's research shows that people without access to a car are twice as likely to own a bus pass and five times as likely to use it frequently.<sup>22</sup> This suggests a need for more investment in bus services that are accessible as well as affordable.

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**Only about two-thirds of people who are eligible for Pension Credit take it up.**

## Possible limits to the bus concession

Despite the wide value of investing in the bus concession and service, there have been criticisms about directing public funding in this way. The bus concession in particular has come under fire. It is important to recognise that the benefits of the policy are set against total local authority spending of around £1 billion per year on the bus concession, which includes both the statutory minimum scheme and discretionary additions.<sup>23</sup>

However, calls to means test<sup>24</sup> or make the concession a taxable benefit<sup>25</sup> risk undermining the value of its universality. Means-testing, for instance, has been shown to be ineffective at targeting benefits, as demonstrated by take-up of Pension Credit. Only about two-thirds of people who are eligible for Pension Credit take it up.<sup>26</sup>

If means-testing were introduced it could significantly restrict access to travel. For example, if the bus concession were only available to those in receipt of Pension Credit, only 2.2 million older people in England would qualify.<sup>27</sup> This is compared to around 9.2 million who have the bus concession now and around 4.8 million who use it at least once a week in England.<sup>28</sup> The numbers could be slightly higher if recipients of Council Tax Benefit and Housing Benefit were included.

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Some administrative savings are necessary and have already been put in place. Changes should only be to administration and not to the provision of bus services, the age at which individuals become eligible, or the universal nature of entitlement. There have already been efforts to simplify the administration of travel concessions in order to reduce costs, and this should be reviewed.

- **The way bus companies are remunerated.** Bus companies should only be compensated for their costs in providing the concessionary fares and should not make money out of the scheme, which is contrary to the concessionary travel legislation. However, we would urge the Government to examine carefully any proposals to further reduce the Bus Service Operators Grant (BSOG) and its potential impact on the provision of bus services, particularly in rural areas.

- **The complexity of funding arrangements.** The grant formula, which distributes funds from national government to local authorities, is complicated and obscure to the public. This makes it difficult for local residents to assess whether or not the money is being used properly. Many local authorities have argued that the grants they receive are not sufficient to meet the costs, including that which arises from pass-holders visiting the area. The complexity of the funding arrangements means that it is very difficult to validate or challenge these claims.

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## Conclusions

**Keeping buses free and reliable is a priority for maintaining quality of life for older people.**

Keeping buses free and reliable is a priority for maintaining quality of life for older people. The Government must maintain a free and universal national bus concession. This goes hand in hand with having a sustainable bus service that meets the needs of older people. This is particularly important for those at risk of social exclusion, because being unable to get out and about impacts directly on their health and wellbeing.

Bus services should not be changed without giving local people a chance to have their say and without alternatives being put in place. In order to achieve better outcomes for older people, local transport accessibility planning needs to be taken seriously. Local authorities have several duties to improve the bus network, including a duty to consider the transport needs of older people when developing policy and practice. Local authorities must react to the needs and views of older people and promote co-operation between all potential partners to find suitable service provision.

Local authorities should also consider their investment in local transport across the board. Where private transport is not possible and the public transport system does not fully serve the needs of older people, local authorities should provide flexible alternatives, such as financial support of community transport or taxis.

<sup>1</sup>Live Polling Results: Are we prepared for an ageing society?, Age UK and Ipsos MORI, 2010



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# Notes

- <sup>2</sup> *Save Our Buses*, Campaign for Better Transport, 2011
- <sup>3</sup> Comprehensive Spending Review, HM Treasury, 2010.  
Available at: [www.hm-treasury.gov.uk/spend\\_index.htm](http://www.hm-treasury.gov.uk/spend_index.htm)
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- <sup>5</sup> *Creating Growth, Cutting Carbon: Making sustainable local transport happen*, Department for Transport, 2010
- <sup>6</sup> *Save Our Buses*, Campaign for Better Transport 2011
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- <sup>9</sup> *England-wide Concessionary Bus Travel: The passenger perspective*, Passenger Focus, July 2009
- <sup>10</sup> *Making the Connections: Final report on transport and social exclusion*, Social Exclusion Unit, 2003
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- <sup>13</sup> A. Scott and A. Humphreys, *Older People's Use of Concessionary Bus Travel*, NatCen, Age UK, 2012
- <sup>14</sup> G. Andrews, *Just the Ticket? Understanding the wide-ranging benefits of England's concessionary fares policy*, Age UK, 2012
- <sup>15</sup> G. Andrews, *Just the Ticket? Understanding the wide-ranging benefits of England's concessionary fares policy*, Age UK, 2012
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- <sup>19</sup> A. Scott and A. Humphreys, *Older People's Use of Concessionary Bus Travel*, NatCen, Age UK, 2012
- <sup>20</sup> *Measuring Progress: Sustainable development indicators*, Defra, 2010
- <sup>21</sup> *Agenda for Life Survey*, ICM Research for Age UK, 2010
- <sup>22</sup> A. Scott and A. Humphreys, *Older People's Use of Concessionary Bus Travel*, NatCen, Age UK, 2012
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- <sup>25</sup> *Opportunity Age*, CSJ, 2011
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- <sup>27</sup> *Pension Credit Caseload*, DWP, May 2011
- <sup>28</sup> Based on: *Population Estimates for UK, England and Wales, Scotland and Northern Ireland – Mid 2010*. Available at: [www.ons.gov.uk/ons/publications/re-reference-tables.html?edition=tcm%3A77-231847](http://www.ons.gov.uk/ons/publications/re-reference-tables.html?edition=tcm%3A77-231847) (accessed 26 January 2012)



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