
Title Warwickshire Companion Passes
Feasibility Study

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1. Introduction

- 1.1 ITP has been commissioned to undertake a feasibility study to explore the introduction of a companion pass to the existing concessionary travel scheme in Warwickshire.
- 1.2 This aims to explore how the concessionary companion pass is managed in other local authorities; understand best practice; and estimate the potential financial implications of introducing companion passes as a discretionary enhancement in Warwickshire.

Background

- 1.3 A companion pass for concessionary travel is a discretionary enhancement to the English National Concession Travel Scheme (ENCTS).
- 1.4 A companion pass is typically offered to a concessionary travel pass holder who would be unable to make a journey without assistance. A companion pass therefore allows the holder of a pass to travel with a companion without the need for that companion to pay a fare. These can be offered to disabled person's pass (DPP) holders, older person's pass (OPP) holders, or both.
- 1.5 Using ONS data, of the 83 travel concession authorities in England, 53 offer a companion pass as a discretionary element within their concessionary travel schemes. However, management of these schemes differs widely across authorities.

Review of best practice

- 1.6 Of the 53 authorities which offer a companion pass, a request for information was sent to 44 authorities, for whom we had contact information.
- 1.7 Information was requested relating to the overall management of the companion pass scheme, data on the current scheme, and eligibility criteria including assessments.
- 1.8 Information for 40 authorities has been gathered either directly from the local authority via email or Knowledge Hub (20) or from their website (20).

2. Overall management of companion pass scheme

2.1 Overall management of the companion pass scheme explored the background of the scheme and how it is administered. This covered:

- 1) Is a companion pass available for both OPP and DPP holders?
- 2) Is there age limit cut off either lower or above retirement age?
- 3) Is there a charge for a companion pass?
- 4) Does the pass allow for multiple companions?
- 5) Are temporary companion passes provided?

Availability of companion passes

2.2 Of the 40 local authorities, 27 offer a companion pass to disabled passholders only; 13 offer a companion pass to both disabled and older persons passholders.

Age requirements for companion passes

2.3 Of the 22 authorities with information on provision of disabled passes to applicants over retirement age:

- 11 provided disabled passes to people over retirement age.
- 7 authorities did not provide disabled passes to applicants over retirement age.
- 3 gave applicants a disabled pass to people over retirement age when only the companion element is required.
- 1 provided the choice to the applicant.

2.4 With regards to minimum age, 12 authorities had a lower age cut off for companion concessionary passes:

- 7 authorities required passholders to be aged 11/12 or above.
- 4 required passholders to be aged 5 or above.
- 1 specified that children aged 5 to 15 must provide evidence from a medical specialist to demonstrate requirement.

2.5 Of those that did not have a lower age cut off, 3 stated that discretion is taken with each application.

Charge for companion pass

2.6 Only 1 of the companion pass schemes reviewed, charged for a companion pass. This was for Oxfordshire County Council, which charges £10 if upgrading to a companion pass outside of scheduled renewal period.

- 2.7 Whilst none of the other schemes charged for a companion pass, many schemes which required evidence from a medical specialist or professional did not cover the cost of obtaining this additional evidence.

Multiple companions

- 2.8 Of the 22 authorities with data, only 3 allowed for multiple companions, the remaining 19 authorities did not.

Temporary companion passes

- 2.9 Only 1 of the 16 schemes with available data provided temporary companion passes, with 6 stating their scheme has no provision of temporary passes.

3. Companion pass data

- 3.1 This section requested information on the number of companion passholders in an authority (and split by OPP and DPP), the total of all passholders, and expenditure of companion passholders.

Companion pass holders

- 3.2 Companion passholder data varied by authority, 20 provided data either as a number or a percentage of all passholders or disabled passholders.
- 3.3 Nine authorities provided information of companion passes as a percentage of disabled passholders. These ranged from 16% to 66%, providing an average of **39.3% of DPP holders**.
- 3.4 Nine authorities provided information of companion passes as a percentage of all passholders. These ranged from 1.3% to 7%, providing an average across the authorities of **2.97% of all passholders**.
- 3.5 Where companion passes were offered to both DPP and OPP holders, OPP holders with a companion pass were typically less than 0.5% of all passholders (e.g., 0.3% for Staffordshire and 0.24% for Medway).
- 3.6 Table 1 below details information provided by authorities for total passholders, total companion pass holders, and percentages of companion passes for disabled passholders and all passholders.

Table 1 - Companion pass data provided by local authorities (gaps where information not provided)

Travel Concession Authority	Total ENCTS passholders	Total companion passholders	Companion passholders as a percentage of all passholders	DPP with companion pass
Bedford Borough Council				16% of DPP holders
Bournemouth, Christchurch, and Poole Council	66,505	2,249	3.4%	35.9% of DPP holders
Cumberland and Westmorland & Furness Council				27% of DPP holders
Devon County Council	135,772	2,313	1.7%	
Durham County Council	115,900	8,247	7%	39% of DPP holders
East Sussex County Council	101,011	2,708	2.69%	47% of DPP holders
Essex County Council			2.6%	44% of DPP holders
Hertfordshire County Council	184,510		2.38%	
Medway Council	32,946	1,687	5.12%	66% of DPP holders
Nottinghamshire County Council		3,500		34% of DPP holders
Oxfordshire County Council				33.8% of DPP holders

Staffordshire County Council	112,839	1,960	1.74%	
Swindon Borough Council	33,279	456 (169 bus passes, 222 companion taxi OPP passes, 65 companion taxi DPP passes)	1.3%	
Thurrock Council				36% of DPP holders
City of York Council				55% of DPP holders
Wiltshire County Council	71,946	1,304	1.81%	38% of DPP holders
Average			2.97%	39.3%

Companion pass expenditure

- 3.7 Two authorities provided estimated annual companion pass expenditure – [REDACTED] and [REDACTED].

Table 2 - Companion pass expenditure information provided by local authorities

Travel Concession Authority	Number of Companion Pass Holders	Companion Pass Expenditure	Estimated cost per companion passholder
[REDACTED]	2,313	£80,000 per year	£34.60
[REDACTED]	3,500	£75,000 per year	£21.43

- 3.8 Using the above, an average estimated cost per companion passholder would be **£28.00**.

- 3.9 Information on expenditure of companion passes was commonly not recorded by local authorities, as such, the request for a split of expenditure by statutory and non-statutory times received no data.

Journey Data

- 3.10 Whilst journey data was not specifically requested from local authorities, 2 provided information on what proportion of journeys are undertaken using a companion pass.
- 3.11 2.46% of journeys in Hertfordshire and 3% of journeys in Staffordshire are undertaken using a companion pass.

4. Eligibility criteria and assessments

- 4.1 Eligibility criteria is similar across different local authorities. A companion pass is only provided where a need for assistance when travelling by bus can be proven. Therefore, eligibility is typically for all categories of disability, however, need for assistance must be proven alongside this.
- 4.2 Where applicants are required to provide documentation evidence of disability, approved documents usually include (this was the case for 21 authorities):
- Disability Living Allowance – higher rate for either mobility or care component
 - Award of Personal Independence Payments – either 8 or 12+ points for 'moving around' category and 8 or 10+ for 'planning and following a journey'
 - War Pensioner's Mobility Supplement
 - Attendance Allowance – higher rate
- 4.3 For 14 authorities, evidence was required from either a medical specialist, GP, or medical professional to prove need for assistance, regardless of whether they had the above documentation.
- 4.4 Cost of approval from a medical specialist typically fell on the applicant of the companion pass.

Assessments for Eligibility

- 4.5 Two authorities provide assessments for eligibility for a companion pass, the remaining authorities required applicants to provide all relevant documentation with their application.
- 4.6 Bedford Borough Council provide for a short telephone assessment to be undertaken if evidence is unclear from the documentation provided; this is administered by an independent mobility company.

- 4.7 Nottingham City Council provides medical assessments, costing £60 per assessment.

Additional eligibility

- 4.8 Several authorities provided reciprocal arrangements for the provision of companion passes. For example, companion pass holders in Thurrock Council are able to use their passes in the neighbouring authorities of Essex and Southend.
- 4.9 Some authorities provide automatic eligibility for certain groups. Swindon Council provides automatic eligibility to those over 80 and Oxfordshire County Council provides automatic entitlement to DPP holders aged 5-15.

5. Companion passes for Warwickshire

- 5.1 As of the end of March 2023, the split of concessionary pass holders in Warwickshire are as follows:

Table 3 - Warwickshire concession passholder data for 2022/3

Category	Number of Passes
Older Person	79,651
a. Blind or Partially Sighted	332
b. Profoundly or Severely Deaf	109
c. Without Speech	27
d. Ability to Walk	1,411
e. No arms or loss of use of both arms	0
f. Learning disability	849
g. Would be refused a driving licence	913
Total	83,292

- 5.2 Of all passholders in Warwickshire, 4.4% (3,641) are disabled pass holders and 95.6% (79,651) are older persons passholders.

- 5.3 Using the information provided by local authorities, the average percentage of DPP holders with a companion pass was 39.3% and the percentage of all passholders with a companion pass was 2.97%
- 5.4 Applying this to the passholder data for Warwickshire, this produces the following estimates for companion pass uptake in Warwickshire:

Table 4 - Estimates for companion pass holders for Warwickshire

Pass Category	Est. Number of Companion Pass Uptake
Disabled Persons Pass (38.6%)	1,431
All passholders (2.97%)	2,477

- 5.5 The total cost of Warwickshire ENCTS scheme for the 2022/3 scheme year, including additional costs paid to Stagecoach, is £5,060,296.
- 5.6 In terms of expenditure for companion passholders, applying the average percentage of companion passholders (2.97%) to the total ENCTS expenditure, the annual cost for companion passes would be around **£150,000**.
- 5.7 Applying the average percentage of percentage of DPP with a companion pass (39.3%) to Warwickshire figures, the number of companion passes would be 1,431, which is 1.7% of the total number of passholders. Applying this to the total reimbursement results in an estimated cost of **£86,000**.
- 5.8 Alternatively, if we apply an average cost of £28.00 per companion passholder, and assuming the uptake of 1,400-2,500 companion pass holders, the expenditure would be an estimated **£39,200 - £70,000** annually.
- 5.9 Taking into consideration the different methodologies and assumptions relating to percentage uptake and percentage of total spend, the estimated cost of a companion enhancement to the ENCTS scheme range from **£39,000 to £150,000** per year in Warwickshire.