

Cabinet

28 January 2025

Concessionary Travel - future of the companion (+1) pass add-on

Recommendations

That Cabinet:

1. Approves the continuation of the Companion (+1) concessionary travel pass add-on scheme, subject to funding continuing to be available within existing budgets.
2. Confirms the continued application of the existing eligibility criteria for the companion (+1) add-on.

1. Executive Summary

- 1.1. Warwickshire County Council is responsible for operating the England National Concessionary Travel Scheme (ENCTS) in Warwickshire. The statutory scheme provides free off-peak travel to eligible individuals and funding for the scheme is included within the overall financial settlement for local government.
- 1.2. Following a Cabinet decision in July 2023, the scheme was amended to include a Companion (+1) pass add-on from 1 January 2024 until 31 March 2025. The add-on enables a passholder with a +1 designation on their pass to take a carer with them free of charge when they use their pass within Warwickshire.
- 1.3. The costs and take-up of the scheme were evaluated during 2024 to enable a decision to be taken as to whether to continue the scheme after its current end date of 31 March 2025.

2. Results from the first ten months of the scheme

- 2.1. The technicalities of setting up the Warwickshire ITSO smartcard for companion passes were completed by 31 October 2023. ITSO is the government-supported smartcard organisation which is used across the UK for the national concessionary travel schemes. It was formerly known as the Integrated Transport Smartcard Organisation but now just known as ITSO as the standard and specification now covers other forms of ticketing besides smartcards and transport)

- 2.2. Successful test passes were generated during November 2023. Details and test passes were then passed onto Warwickshire bus operators during November and December 2023.
- 2.3. Applications were welcomed from late December 2023 and the first passes were with customers by 1 January 2024.
- 2.4. Members of staff have been proactive in suggesting the add-on to new applicants who they believe may qualify, and where it appears that someone renewing their pass will qualify.
- 2.5. Applications have been managed via post and email, via the concessionary travel team and via libraries, rather than being made available online. This is so that the team could ensure they spoke to all applicants to discuss eligibility.
- 2.6. Up to 31 December 2024 there had been 183 Companion (+1) passes issued, with the split of users shown in Figure 1 below.

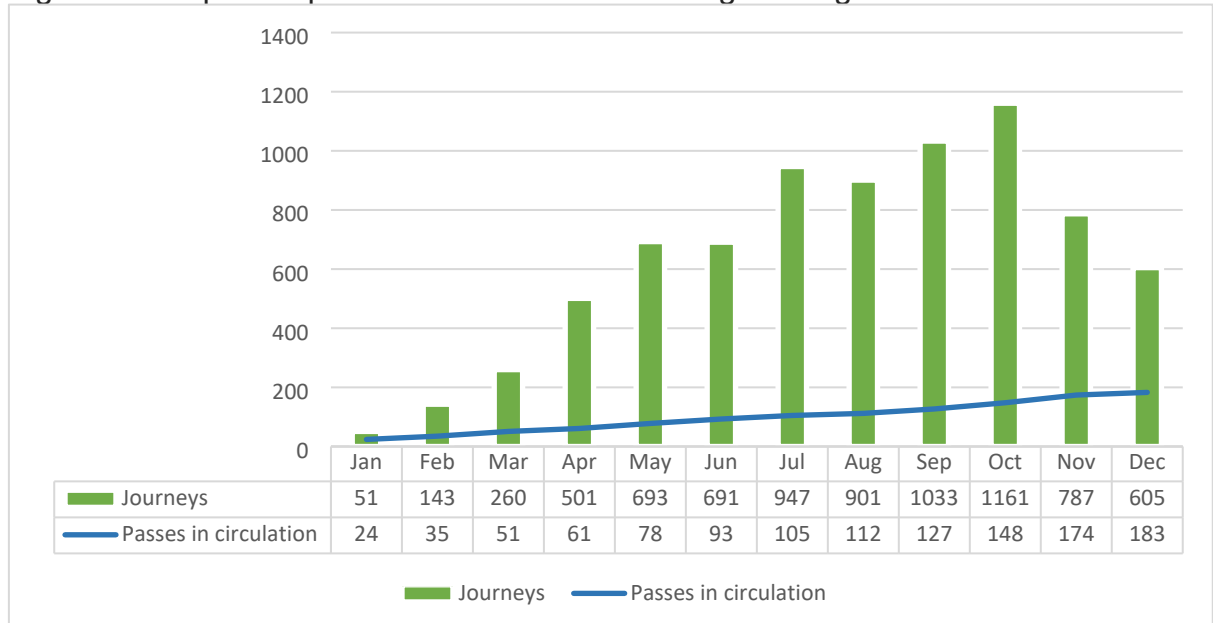
Figure 1 Eligibility for ENCTS pass	Reason for the +1			Grand Total
	Registered Blind	Accompanied 24/7	Physically unable to board bus	
Older person	5	17	3	25
Category a. Blind or partially sighted	45	14		59
Category b. Profoundly or severely deaf	1	1		2
Category c. Without speech		6		6
Category d. Ability to walk		24	4	28
Category f. Learning disability	2	53		55
Category g. Would be refused a driving licence on medical grounds		7	1	8
Grand Total	53	122	8	183

- 2.7. Forty of these were issued following brand new applications made since January 2024, and the remainder were existing or previous passholders who requested the add-on, either at renewal or, when they found out about the option.
- 2.8. As well as the issued passes, there are 34 known applicants where the companion (+1) add-on was refused as the applicant was not eligible.
- 2.9. Journey information is estimated due to some issues with the way some bus operators were recording them. However, journey numbers have been estimated to have reached over 800 per month by July, rising from fewer than 150 in February (journey data only analysed for the first 9 months of the

scheme). From April – September the average number of journeys per pass was 7 per month.

- 2.10. It is expected given the trends illustrated in Figure 2 below that the number of companion passes issued, and journeys made, will increase if the scheme is retained and more widely publicised.

Figure 2 Companion passes in circulation and usage during 2024



- 2.11. Our initial estimate of likely potential applications was between 1000 and 5000 passholders. In practice, the number of applicants has been far fewer, and there are two reasons for this:

- Lack of awareness of the scheme among existing passholders.
- Some eligible passholders have carers who have their own concessionary bus pass – this is particularly the case for people with older person’s passes.

- 2.12. Revised estimates for 2025 are between 250-500 additional applicants, using the current eligibility criteria. This is still considered to be an appropriate and viable scheme given the level of benefit provided to those passholders who are eligible.

3. Entitlement to the Companion (+1) add on

- 3.1. In recommending the continuation of the scheme, the opportunity was taken to review the Equality Impact Assessment. The revised EQIA is included as Appendix 2.
- 3.2. The criteria for eligibility have also been reviewed. These are referred to as ‘reasons’ to differentiate them from the statutory eligibility criteria for a bus pass which are set out in legislation. It is proposed to leave the reasons for issuing the Companion (+1) add on unchanged, but some of the wording of

the reasons will be amended to make it clearer to applicants what the eligibility thresholds are. For example, wording will be revised to refer to 24-hour care, rather than 'care at all times', as some applicants said they needed care all the time but also said they lived alone.

- 3.3. The reasons for issuing the add-on are given in Appendix 3 and will form part of the Council's policy on Concessionary Travel. The list of acceptable evidence to show entitlement will also be monitored, reviewed, and updated periodically by officers moving forward.

4. Financial Implications

- 4.1. Setting up the scheme involved a one-off cost of £3,865 to register the add on with ITSO and roll it out to operators.
- 4.2. To continue the scheme will cost £356 p.a. in ongoing licence costs, plus a small amount in issuing additional test passes to operators each time the scheme is renewed or extended.
- 4.3. Based on the July- September level of passes and usage, estimated additional annual expenditure for the companion (+1) add-on will be just over c £19,000 p.a.
- 4.4. If extended, the number of passholders is expected to double as more people become aware of the scheme and submit applications.
- 4.5. Based on existing journeys per pass the cost would be less than c. £40,000 p.a. This is within the existing budget, and only represents 0.75% of the overall expenditure on bus operator reimbursement.
- 4.6. In terms of future funding, the Council is now reimbursing bus operators based on the new Department for Transport (DfT) Calculator. For 2021/22, 2022/23 and 2023/24 bus operators were being reimbursed based on pre-COVID estimates of travel, although patronage had not fully recovered after COVID. This was done based on DfT guidance and was intended to help preserve the viability of the commercial bus network. The new post-COVID calculator was announced just over 12 months ago and for 2024/25 there is a slightly higher payment per journey, but this is balanced against using the actual journey numbers and the overall cost of reimbursement is estimated to have reduced by around 4%. Reimbursement to bus operators for 2024/25 is estimated at £4,967m, but the actual amount will depend on the number of journeys made.
- 4.7. The DfT has indicated that bus budgets should be maintained at current levels under the current Bus Service Improvement Plan (BSIP+) arrangements, which means that any unspent concessionary travel funding would still need to be spent for the purposes of public transport public transport.

- 4.8. It is therefore proposed that the add-on is retained as a discretionary enhancement without a time limit, until such time that it is not possible to fund it through an existing budget.
- 4.9. If, at a future date, the add-on cannot be funded from within the concessionary travel budget, and an alternative source of funding cannot be identified, then a further report will be brought before Cabinet to determine the future of the add-on.

5. Environmental Implications

- 5.1. Overall, there is environmental benefit to increasing the number of people traveling by bus. However, it is not possible to quantify the direct impact of the Companion (+1) add on at this stage.

6. Social Implications

- 6.1. Feedback has been sought from passholders who have been issued with the Companion (+1) pass (or their carers where they were unable to respond themselves). This is listed in Appendix 1. This was a small sample of people but all comments about the add-on were positive.
- 6.2. Comments from passholders included the freedom it offers, the cost of having to pay for carers to travel, the practical benefits of being able to take someone along, such as reading timetables, and several people said they could not travel without taking their carer.
- 6.3. If the add-on is continued, more people will be able to access public transport. If the add-on ends, then passholders who require someone to travel with them must pay for that person to travel, and this is likely to restrict or discourage them from using their entitlement to free bus travel.

7. Timescales associated with the decision and next steps

- 7.1. Existing passes with the Companion (+1) add-on have been set to expire on 31 March 2025. If approval is given, then passholders will be contacted prior to their passes expiring to invite them to renew.
- 7.2. If approval is given to retain the add-on, the ability to make an online application for the Companion (+1) add on will be switched on, and frontline staff at libraries will also be enabled to process the Companion (+1) add-on.
- 7.3. A further press release and publicity will be developed so as to expand knowledge of the add-on amongst people who are likely to be eligible.

Appendices

1. Feedback from passholders
2. Equality Impact Assessment
3. Reasons for issuing a Companion (+1) pass

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The report was circulated to the following members prior to publication:

Local Member(s): N/A – this is a county wide matter

Other members: Chair and Party Spokes for the Communities Overview and Scrutiny Committee: Councillors Jeff Clarke, Jonathan Chilvers, Sarah Feeney, and Jenny Fradgley