

Development Department Research Programme

Monitoring Free Local Off-Peak Bus Travel for Older and Disabled People

Colin Buchanan and Partners

Colin Buchanan and Partners were commissioned in 2001 by the Scottish Executive to monitor the introduction of the national minimum concessionary fare. Free local off-peak concessionary bus travel was introduced in Scotland on 30 September 2002 for women aged 60 and over and for men aged 65 and over. On 1 April 2003 the entitlement to free travel was extended to men aged 60 – 64. The monitoring was undertaken as a before and after study involving a number of survey instruments to collect a range of quantitative and qualitative information regarding concessionary trip making. This Research Findings paper summarises the final report and includes a full comparison of before and after comparisons of concessionary travel behaviour and attitudes.

The Key Objectives

The key objectives of the study were to:

- quantify the occurrence, frequency and purpose of concessionary trips
- identify the proportion of concessionary passengers related to bus and train capacity
- identify travel alternatives which would be made were the concession not available
- identify general attitudes towards concessionary travel
- quantify additional trips that are directly attributable to the introduction of the free fare in both the peak and off peak
- model the likely effects of demographic, car ownership and other lifestyle indicators upon future trends of concessionary travel.

Main Findings

- There was a significant growth in the number of concessionary trips surveyed following the introduction of the free fare. Surveys - at selected busy bus stops - of passengers boarding bus stops suggests an off-peak growth of 67%. This survey is expected to overestimate growth. The returns for selected routes in Dundee, Edinburgh and Glasgow from bus operators show off-peak growth in the range of 20-30%.
- This growth in trips has resulted from an increase in the number of people taking up their entitlement to a concessionary pass rather than an increase in the number of trips made by individuals. The growth in trips, however, is not directly proportional to the number of pass-holders. The proportion of new pass-holders who live in car-owning households is significantly greater than the equivalent proportion of pass-holders prior to the introduction of the free fare. The survey also shows that people who live in car-owning households make significantly fewer bus trips than people who live in non car-owning households. As a consequence of this demographic change, the average bus trip rate per pass-holder has fallen in a number of areas but this is offset by the increase in the number of pass-holders.
- On average, pass-holders report that they make 5 bus trips per week but this varies between rates of 1.5 and 11.1 bus trips/week depending on socio-economic status. The lower rate relates to people living in rural areas in car-owning households. The higher rate relates to less affluent people living in cities in non car-owning households. It is expected that this self reporting of trips may over-estimate the actual number of trips made.
- A significant switch from rail to bus was measured by on-train surveys on routes in the Lothians and Strathclyde where bus offered a free fare alternative after 30 September 2002. The survey shows that 53% of rail passengers, eligible for a bus concessionary fare on such routes, opted to use a bus instead of a train. In the after survey, a fall in the number of trips being made was reported by rail passengers who stated that they would not have made the trip by train if they could have travelled free on a bus. The survey findings are consistent with the hypothesis that the fall in the number of rail passengers has resulted from a switch from rail to bus in the light of the introduction of free concessionary travel on buses. This was independent of a general overall fall in the number of rail passengers between the surveys of 5%.
- Shopping is by far the most popular trip purpose with almost two thirds (65%) of boarding passengers interviewed at bus stops after the introduction of the free fare reporting that their trip was for this purpose. Table 1 below sets out detailed information on trip purpose before and after the introduction of the free fare. Purposes relating to medical appointment, meeting people and recreation/leisure all demonstrate changes above the average.
- The self-reporting of trip purpose presented a similar finding regarding shopping being the most common purpose (60% of respondents make shopping trips often or very often) but which also gave greater weight to other purposes including social (31%), medical/health (21%) and personal business (17%).
- On average, in the four main cities, concessionary passengers accounted for between 18% and 21% in the before period and between 21% and 27% in the after period. This varied by time of day; in the after survey the highest proportions of concessionary passengers ranged between 36% and 44% in the morning off-peak period (09.30-13.00). During the period (16.00-19.00) covering the evening peak the equivalent after figures ranged between 14% and 18%.
- The growth of concessionary travel in the period covering the evening peak represents an average additional number of concessionary bus passengers per bus trip of 1.1, 0.8, 2.1 and 1.1 for Aberdeen, Dundee, Edinburgh and Glasgow respectively. It is, however, recognised that the additional concessionary occupancy on individual buses at certain points on a route will be higher than the average on some buses and less than the average on others.
- Travel alternatives that would be made in the absence of the free concession were also examined. The results show that:
 - some people using buses indicate that they would not have made the trip if the concession was not available
 - some people on lower incomes in non-car owning households would make fewer bus trips
 - some people in car-owning households would use a car to make some or all of trips that they now make by bus
 - some people would adjust their travel habits to make fewer bus trips perhaps doubling up on purpose
 - some people would not have taken up their entitlement to a concessionary pass
 - some people would return to rail on routes where rail and bus are in competition.

■ Concessionary pass-holders are generally very positive about the benefits – both financial and social – that free travel offers them. Indeed, some people report they or people they know would make fewer or no trips if free travel were to be abolished. Other people would return to car as their main mode. A clear message from the focus groups was the opportunity that free travel offers pass-holders to enrich their lifestyle. These findings were supported by comments offered by pass-holder who responded to a self-completion survey on concessionary bus use. These comments included:

“This is one of the most important assets in old age. We can get out and meet friends and this improves our lot physically and mentally.”

After Survey, female, 60-64, SPT Area, no access to car.

“I think the concessionary bus travel is great, long may it continue.”

After Survey, male, 60-64, Fife, with access to car.

“Bus concession travel has made a huge difference to me I suffer from asthma and as the shops are at least fifteen minutes away going by bus makes me less breathless.”

After Survey, female, 65-74, Edinburgh, no access to car.

■ A very small number of comments were received from respondents who felt differently about concessionary travel. These included:

“In a society free from political correctness and political pressure the executive would introduce a means test for concessionary travel.”

After Survey, male, 80-84, Aberdeen City, with access to car.

“The concessionary free travel is an excellent one although I feel that a nominal contribution of say 20p per journey would not be unreasonable I use my car because I cannot walk any great distance it is also more convenient for shopping.”

After Survey, male, 65-74, Fife, with access to car.

“I feel guilty when I see people with families having to subsidise my free fare.”

After Survey, female, 65-74, Aberdeen City, with access to car.

■ A demographic model, which assumes background inflation of 2.5%pa and bus fare inflation of 4.3%pa, predicts that concessionary patronage is expected to increase by 9% from 95.5m passengers/year in 2002 to 104.4m passengers/year in 2012.

Table 1: Trip Purpose Before and After 30 September 2002

Purpose	Before	After	Change	% Change	% of after responses
Shopping	1,133	1,855	722	64%	65%
Meeting people	155	265	110	71%	9%
Medical appointment	95	237	142	149%	8%
Recreation/leisure	105	184	79	75%	6%
Personal business	92	147	55	60%	5%
Other purpose	60	63	3	5%	2%
Getting to/from work	35	48	13	37%	2%
Travel during work	6	10	4	67%	0%
No response	3	44	41	1,367%	2%
Missing	32	11	-21	-66%	0%
Total	1,716	2,864	1,148	67%	100%

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