2012 Concessionary Travel Survey Questionnaire

	. Name					
b	. LA Type	Please select from list				
	-	s part of a scheme, please spe d and who is the lead authority	_		heme, v	which other
	. Scheme Name	a and who is the lead authority		7 7 April 2012. 4		
b	. Lead Authority					
С	Joint Authorities 🌵					
	add a local authorit	(Click the button to	the le	eft, in order to add a	Local A	uthority)
		Currently entered Local	Autho	orities		
P	lease provide your co	ntact details:				
a	. Name					
b	. Email					
c	. Telephone No.					
_						
	•	'				
ŝΕ	•	TURE ON CONCESSIONARY	TR/	AVEL		
	CTION 2 - EXPENDI	TURE ON CONCESSIONARY for Total Net Current Expendit			travel a	nd a breakdo
Р	CTION 2 - EXPENDI				travel a	nd a breakdo
Р	CTION 2 - EXPENDI	for Total Net Current Expendit			travel a	nd a breakdo 2012/13 Budget
b	CTION 2 - EXPENDI	for Total Net Current Expendit tionary net expenditure. 🌵		on concessionary 2011/12 Provisional	travel a	2012/13
P b	CTION 2 - EXPENDI lease provide figures y statutory and discre	for Total Net Current Expendit tionary net expenditure. 🌵	ure o	on concessionary 2011/12 Provisional		2012/13
P b	CTION 2 - EXPENDI lease provide figures y statutory and discre	for Total Net Current Expendit tionary net expenditure. 🍑 enditure 🖤	ure o	on concessionary 2011/12 Provisional		2012/13
a b	CTION 2 - EXPENDI lease provide figures y statutory and discre . Total Net Current Expension of which . ENCTS statutory net e	for Total Net Current Expendit tionary net expenditure. 🍑 enditure 🖤	ure c	on concessionary 2011/12 Provisional	£	2012/13
P b	CTION 2 - EXPENDITE I LEASE provide figures by statutory and discress of which and the control of which are statutory net expenditure on EN	for Total Net Current Expendit tionary net expenditure. enditure enditure expenditure	ure c	on concessionary 2011/12 Provisional	£	2012/13
P b a C b c d	CTION 2 - EXPENDITE I LEASE provide figures by statutory and discress of which and the ENCTS statutory net expenditure on ENCTS of the Expenditure of the Expenditure on ENCTS of the Expenditure of the Expe	for Total Net Current Expendit tionary net expenditure.	£ £ £	2011/12 Provisional Outturn	£	2012/13 Budget
a C b c d	CTION 2 - EXPENDI lease provide figures y statutory and discre Total Net Current Expendium ENCTS statutory net e Net expenditure on EN Other concessions net Please provide details	for Total Net Current Expendit tionary net expenditure. enditure enditure expenditure	£ £ £ £ £ £ £ £ £ £	2011/12 Provisional Outturn	£ £ £ £ £ £ \$ split expe	2012/13 Budget

SECTION 3 - CONCESSIONARY AND OTHER LOCAL BUS JOURNEYS

a. Total concessionary bus journeys by older/disabled people b. Of which ENCTS statutory bus journeys Please complete the table below with as much detail as you are able to supply about all bus journeys in your TCA during 2011/12. This question seeks information on the total number of bus passenger journeys originating in your TCA during 2011/12 and how these are split between concessionary and non-concessionary journeys. If you are able to, please also provide a split between concessionary and non-concessionary journeys. If you are able to, please also provide a split between concessionary and non-concessionary journeys. If you are able to, please note that the data in rows b, c and d should add up to row a and the data in columns (2) and (3) shou add up to (1). However, please enter as much data as you have readily available. Where a figure is not vauilable, please leave the box blank, rather than entering zero. Note that forecasts are not required for this table. Journeys during 2011/12 All Services Commercially operated services a. Total number of passenger journeys (all journeys - include concessionary and non-concessionary journeys) b. Number of concessionary bus journeys by older/disabled people c. Number of youth concessionary bus journeys and all non-concessionary journeys d. Number of other concessionary journeys and all non-concessionary journeys e. To assist with validation of other DfT bus surveys later in the year, we may ask for a split of the data in question 6 by the different operators within your TCA. If you are able to supply this data and are happy for us to contact you about it in future, please indicate this by ticking the box below. I am happy to supply an operator-level split of the bus journeys data at a later date. C. Please provide details of the basis for your estimates and assessment of the reliability of the figures/underlying the data in Q8 and Q6.	What is the number of concessionary bus your TCA which are subject to concession journeys made during 2011/12 and a fored	nary fare reimburser		
b. Of which ENCTS statutory bus journeys Please complete the table below with as much detail as you are able to supply about all bus journeys in your TCA during 2011/12. This question seeks information on the total number of bus passenger journeys originating in your TCA during 2011/12 and how these are split between concessionary and non-concessionary journeys. If you are able to, please also provide a split between commercially operated and financially supported services. Please note that the data in rows b, c and d should add up to row a and the data in columns (2) and (3) should up to (1). However, please enter as much data as you have readily available. Where a figure is not available, please leave the box blank, rather than entering zero. Note that forecasts are not required for this table. Journeys during 2011/12 All Services (1) (2) (3) Financially operated services a. Total number of passenger journeys (all journeys include concessionary and non-concessionary journeys) b. Number of concessionary bus journeys by older/disabled people c. Number of youth concessionary bus journeys and all non-concessionary journeys d. Number of other concessionary journeys and all non-concessionary journeys e. To assist with validation of other DfT bus surveys later in the year, we may ask for a split of the data in question 6 by the different operators within your TCA. If you are able to supply this data and are happy for us to contact you about it in future, please indicate this by ticking the box below. I am happy to supply an operator-level split of the bus journeys data at a later date. C. Please provide details of the basis for your estimates and assessment of the reliability of the				
Please complete the table below with as much detail as you are able to supply about all bus journeys in your TCA during 2011/12. This question seeks information on the total number of bus passenger journeys originating in your TCA during 2011/12 and how these are split between concessionary and non-concessionary journeys. If you are able to please also provide a split between commercially operated and financially supported services. Please note that the data in rows b, c and d should add up to row a and the data in columns (2) and (3) should add up to (1). However, please enter as much data as you have readily available. Where a figure is not available, please leave the box blank, rather than entering zero. Note that forecasts are not required for this table. 1				
This question seeks information on the total number of bus passenger journeys originating in your TCA during 2011/12 and how these are split between concessionary and non-concessionary journeys. If you are able to please also provide a split between commercially operated and financially supported services. Please note that the data in rows b, c and d should add up to row a and the data in columns (2) and (3) should up to (1). However, please enter as much data as you have readily available. Where a figure is not available, please leave the box blank, rather than entering zero. Note that forecasts are not required for this table. Journeys during 2011/12	b. Of which ENCTS statutory bus journeys ψ			
2011/12 and how these are split between concessionary and non-concessionary journeys. If you are able to, please also provide a split between commercially operated and financially supported services. Please note that the data in rows b, c and d should add up to row a and the data in columns (2) and (3) should add up to (1). However, please enter as much data as you have readily available. Where a figure is not available, please leave the box blank, rather than entering zero. Note that forecasts are not required for this table. 1		much detail as you a	re able to supply al	oout all bus
add up to (1). However, please enter as much data as you have readily available. Where a figure is not available, please leave the box blank, rather than entering zero. Note that forecasts are not required for this table. Journeys during 2011/12	2011/12 and how these are split between cond	cessionary and non-co	oncessionary journeys	s. If you are able to,
All Services Commercially operated services a. Total number of passenger journeys (all journeys - include concessionary and nonconcessionary journeys) b. Number of concessionary bus journeys by older/disabled people c. Number of youth concessionary bus journeys and all non-concessionary journeys d. Number of other concessionary journeys and all non-concessionary journeys e. To assist with validation of other DfT bus surveys later in the year, we may ask for a split of the data in question 6 by the different operators within your TCA. If you are able to supply this data and are happy for us to contact you about it in future, please indicate this by ticking the box below. I am happy to supply an operator-level split of the bus journeys data at a later date. 7. Please provide details of the basis for your estimates and assessment of the reliability of the	add up to (1). However, please enter as much available, please leave the box blank, rather the	data as you have rea	dily available. Where	a figure is not
journeys - include concessionary and non-concessionary journeys) b. Number of concessionary bus journeys by older/disabled people c. Number of youth concessionary bus journeys and all non-concessionary journeys and all non-concessionary journeys e. To assist with validation of other DfT bus surveys later in the year, we may ask for a split of the data in question 6 by the different operators within your TCA. If you are able to supply this data and are happy for us to contact you about it in future, please indicate this by ticking the box below. I am happy to supply an operator-level split of the bus journeys data at a later date. T. Please provide details of the basis for your estimates and assessment of the reliability of the	Journeys during 2011/12		Commercially operated	Financially supported
c. Number of youth concessionary bus journeys d. Number of other concessionary journeys and all non-concessionary journeys and all non-concessionary journeys e. To assist with validation of other DfT bus surveys later in the year, we may ask for a split of the data in question 6 by the different operators within your TCA. If you are able to supply this data and are happy for us to contact you about it in future, please indicate this by ticking the box below. I am happy to supply an operator-level split of the bus journeys data at a later date.	journeys - include concessionary and non-			
d. Number of other concessionary journeys and all non-concessionary journeys and all non-concessionary journeys • e. To assist with validation of other DfT bus surveys later in the year, we may ask for a split of the data in question 6 by the different operators within your TCA. If you are able to supply this data and are happy for us to contact you about it in future, please indicate this by ticking the box below. I am happy to supply an operator-level split of the bus journeys data at a later date.				
e. To assist with validation of other DfT bus surveys later in the year, we may ask for a split of the data in question 6 by the different operators within your TCA. If you are able to supply this data and are happy for us to contact you about it in future, please indicate this by ticking the box below. I am happy to supply an operator-level split of the bus journeys data at a later date. T. Please provide details of the basis for your estimates and assessment of the reliability of the				
question 6 by the different operators within your TCA. If you are able to supply this data and are happy for us to contact you about it in future, please indicate this by ticking the box below. I am happy to supply an operator-level split of the bus journeys data at a later date. Please provide details of the basis for your estimates and assessment of the reliability of the				
7. Please provide details of the basis for your estimates and assessment of the reliability of the	question 6 by the different operators within	your TCA. If you are	able to supply this da	
	I am happy to supply an operato	r-level split of the bus	journeys data at a lat	er date. 🗆
			ssessment of the re	eliability of the

SECTION 4 - CONCESSIONARY PASSES

,	type of pass where possible. 🛡	2011/12 Actual		2012 Fore		
a.	ENCTS passes for older or disabled people					
	Of which					
	i. ENCTS passes for older people					
	ii. ENCTS passes for disabled people					
b.	Discretionary passes for older people					
c.	Discretionary passes for disabled people					
d.	Companion passes or any disabled passes with companion entitlements attached					
e.	Young people					
f.	Other					
	i. If you have supplied figures for "Other" pa	asses, please specify what this	includes	S		
						A
	account for deaths, etc) and assessment	of the reliability of the figu	ire			2
	account for deaths, etc) and assessment CTION 5 - REIMBURSEMENT METHOD	, , , , , , , , , , , , , , , , , , ,	ire			
		DS .	Yes	ē	No	0
SE I	CTION 5 - REIMBURSEMENT METHOD	os for reimbursement? 🖖 DfT guidance, as either a		© ©	No No	0
SE	CTION 5 - REIMBURSEMENT METHOD Oo you have any fixed term arrangements Are you using some or all elements of the starting point for negotiations with bus op	of the following of the	Yes Yes	•		
	CTION 5 - REIMBURSEMENT METHOD Do you have any fixed term arrangements Are you using some or all elements of the starting point for negotiations with bus op reimbursement due in 2012/13?	of the following of the	Yes Yes	•		
SE	CTION 5 - REIMBURSEMENT METHOD Do you have any fixed term arrangements Are you using some or all elements of the starting point for negotiations with bus op reimbursement due in 2012/13? If you use the guidance, which elements described to the starting point for negotiations with bus op reimbursement due in 2012/13?	of the following of the	Yes Yes	•	No	
). /	CTION 5 - REIMBURSEMENT METHOD Do you have any fixed term arrangements Are you using some or all elements of the starting point for negotiations with bus op reimbursement due in 2012/13? If you use the guidance, which elements described to the starting point for negotiations with bus open to the starting point for negotiations with bus open to the starting point for negotiations with bus open to the starting point for negotiations with bus open to the starting point for negotiations with the starting point for negotiatio	of the following of the	Yes Yes	€ oly.	No	
. I	CTION 5 - REIMBURSEMENT METHOD Do you have any fixed term arrangements Are you using some or all elements of the starting point for negotiations with bus op reimbursement due in 2012/13? If you use the guidance, which elements of the guidance, which elements of the guidance. Average Fares a. Discount fare method	of the following of the	Yes Yes	e oly.	No	
SE	CTION 5 - REIMBURSEMENT METHOD Do you have any fixed term arrangements Are you using some or all elements of the starting point for negotiations with bus operimbursement due in 2012/13? If you use the guidance, which elements of the starting point for negotiations with bus operimbursement due in 2012/13? If you use the guidance, which elements of the starting point for method in the starti	of reimbursement? DfT guidance, as either a perators or to calculate do you use? Please select all	Yes Yes	e oly.	No	
. I	CTION 5 - REIMBURSEMENT METHOD Do you have any fixed term arrangements Are you using some or all elements of the starting point for negotiations with bus opreimbursement due in 2012/13? If you use the guidance, which elements described as a Discount fare method Demand	of reimbursement? DfT guidance, as either a perators or to calculate do you use? Please select all	Yes Yes	⊙ oly.	No	
SE	CTION 5 - REIMBURSEMENT METHOD Do you have any fixed term arrangements Are you using some or all elements of the starting point for negotiations with bus opereimbursement due in 2012/13? If you use the guidance, which elements of the starting point for negotiations with bus opereimbursement due in 2012/13? If you use the guidance, which elements of the starting point for negotiations with bus opereimbursement due in 2012/13? If you use the guidance, which elements of the starting point for method in the starting point for negotiations with bus opereimbursement due in 2012/13? If you use the guidance, which elements of the starting point for negotiations with bus opereimbursement due in 2012/13? If you use the guidance, which elements of the starting point for negotiations with bus opereimbursement due in 2012/13? If you use the guidance, which elements of the starting point for negotiations with bus opereimbursement due in 2012/13? If you use the guidance, which elements of the starting point for negotiations with bus opereimbursement due in 2012/13? If you use the guidance, which elements of the starting point for negotiations with bus opereimbursement due in 2012/13?	for reimbursement? DfT guidance, as either a perators or to calculate do you use? Please select all	Yes Yes	⊙ oly.	No	
. I	CTION 5 - REIMBURSEMENT METHOD Do you have any fixed term arrangements Are you using some or all elements of the starting point for negotiations with bus op reimbursement due in 2012/13? If you use the guidance, which elements of the starting point for negotiations with bus op reimbursement due in 2012/13? Average Fares a. Discount fare method Demand Deman	for reimbursement? DfT guidance, as either a perators or to calculate do you use? Please select all OfT calculator	Yes Yes	⊙ oly.	No	
. I	CTION 5 - REIMBURSEMENT METHOD Do you have any fixed term arrangements. Are you using some or all elements of the starting point for negotiations with bus opereimbursement due in 2012/13? If you use the guidance, which elements of the starting point for negotiations with bus opereimbursement due in 2012/13? If you use the guidance, which elements of the starting point for negotiations with bus opereimbursement due in 2012/13? If you use the guidance, which elements of the starting point for negotiations with bus opereimbursement due in 2012/13? If you use the guidance, which elements of the starting point for negotiations with bus opereimbursement due in 2012/13? If you use the guidance, which elements of the starting point for negotiations with bus opereimbursement due in 2012/13? If you use the guidance, which elements of the starting point for negotiations with bus opereimbursement due in 2012/13? If you use the guidance, which elements of the starting point for negotiations with bus opereimbursement due in 2012/13? If you use the guidance, which elements of the starting point for negotiations with bus opereimbursement due in 2012/13? If you use the guidance, which elements of the starting point for negotiations with bus opereimbursement due in 2012/13? If you use the guidance, which elements of the starting point for negotiations with bus opereimbursement due in 2012/13? If you use the guidance, which elements of the starting point for negotiations with bus opereimbursement due in 2012/13? If you use the guidance, which elements of the starting point for negotiations with bus opereimbursement due in 2012/13? If you use the guidance, which elements of the starting point for negotiations with bus opereimbursement due in 2012/13? If you use the guidance, which elements of the starting point for negotiations with bus opereimbursement due in 2012/13? If you use the guidance, which elements of the starting point for negotiations with the starting point for negotiations with the starting point for	for reimbursement? DfT guidance, as either a perators or to calculate do you use? Please select all OfT calculator	Yes Yes	⊙ ply.	No No	
. I	CTION 5 - REIMBURSEMENT METHOD Do you have any fixed term arrangements Are you using some or all elements of the starting point for negotiations with bus opereimbursement due in 2012/13? If you use the guidance, which elements of the starting point for negotiations with bus opereimbursement due in 2012/13? Average Fares a. Discount fare method Demand Deman	for reimbursement? DfT guidance, as either a perators or to calculate do you use? Please select all OfT calculator	Yes Yes	⊙ Dily.	No	
	CTION 5 - REIMBURSEMENT METHOD Do you have any fixed term arrangements Are you using some or all elements of the starting point for negotiations with bus opereimbursement due in 2012/13? If you use the guidance, which elements of the starting point for negotiations with bus opereimbursement due in 2012/13? If you use the guidance, which elements of the starting point fare method to the starting point fare m	for reimbursement? DfT guidance, as either a perators or to calculate do you use? Please select all or Off calculator s or local values	Yes Yes	⊙ Dily.	No No	
SE	CTION 5 - REIMBURSEMENT METHOD Do you have any fixed term arrangements Are you using some or all elements of the starting point for negotiations with bus opereimbursement due in 2012/13? If you use the guidance, which elements of the starting point for negotiations with bus opereimbursement due in 2012/13? Average Fares a. Discount fare method Demand Deman	for reimbursement? DfT guidance, as either a perators or to calculate do you use? Please select all or DfT calculator s or local values	Yes Yes that app		No No	c
SE	CTION 5 - REIMBURSEMENT METHOD Do you have any fixed term arrangements Are you using some or all elements of the starting point for negotiations with bus opereimbursement due in 2012/13? If you use the guidance, which elements of the starting point for negotiations with bus opereimbursement due in 2012/13? If you use the guidance, which elements of the starting point fare method to the starting point fare m	for reimbursement? DfT guidance, as either a perators or to calculate do you use? Please select all Off calculator s or local values	Yes Yes that app		No No	0

SECTION 6 - ENCTS EXPENDITURE AND) ADE	OITIO	NAL	cos	TS REIMBUR	SEMENT
 Please provide figures for total expenditu concessionary travel by ENCTS pass hold 			burse	emen	t of bus operat	tors for
				20	11/12	2012/13
Total reimbursement due		:	£		5	ε
4. Please provide details of the revenue for	gone	comp	onen	t of t	his total expen	diture.
				20	11/12	2012/13
a. Total revenue forgone 🌵		:	£		1	€
b. Average fare forgone for the TCA 🖖			£ 🗀		1	ε
5. Please provide details of the additional co	osts c	ompo	nent	of th	is total expend	liture.
				20	11/12	2012/13
a. Total generated journeys 🌵		:	£		ź	€
b. Total additional costs 🔱		:	£		<u> </u>	ε
of which						
i. Scheme administration costs 🖖		:	£			ε
ii. Total Marginal Operating Costs (MOCs	(٤ 🗀			ε
iii. Total Marginal Capacity Costs (MCCs)	į)	:	£ [ε [
iv. iv.	costs		٤			ε Γ
						A
SECTION 7 - DISCRETIONARY CONCES	SION	S				V
he questions in this section cover the types of dis any vary between local authorities within a TCA / s here will be an opportunity to give more details at the next page. •• 7. Please specify what discretionary conces respect of personal eligibility by answering where relevant.	scheme bout the sions ng YE	e and nese v	betwe variation	en gr ons in in add the b	oups of concess schemes in que dition to the st oxes below an Add deta	stionary passholders. stion 20, at the end of atutory scheme in
	Yes	No	Yes	No		,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,
Older people below the eligible pension age	•	0	0	0		<u></u>
Disabled people who do not meet the statutory eligibility criteria	•	0	œ	О		<u></u>
c. Companions to disabled people 🤨	•	0	•	0		<u></u>
d. Young people 🤨	œ	o	0	0		<u> </u>
e. Unemployed people	•	o	•	0		<u> </u>

f. Others

SECTION 7 - DISCRETIONARY CONCESSIONS (CONTINUED)

Please answer the next two questions from the point of view of discretions offered to **older and/or disabled people who are eligible for the statutory scheme**. The discretions offered may vary between older and disabled people and between different authorities within a TCA / scheme. There will be an opportunity to give more detail about these variations in question 20 at the end of this section.

18. Please specify what discretionary concessions you offer for <u>older and disabled people in addition</u> to the statutory scheme in respect of time of travel by answering YES or NO in the boxes below.

	2011	1/12	201	2/13
	Yes	No	Yes	No
a. Statutory minimum only	•	0	•	O
b. Pre-9.30 start	•	0	•	О
c. If a pre-9.30 start is offered, please specify start times and fares charged (if any)				
d. Extension beyond 11pm	•	0	•	0

19. Please specify what discretionary concessions you offer for <u>older and disabled people in addition</u> to the statutory scheme in respect of services by answering YES or NO in the boxes below.

		201	1/12	2012/13		
		Yes	No	Yes	No	
a.	Trams / light rail / metro services	•	O	0	0	
b.	National rail services	•	0	0	0	
c.	Ferry services	•	0	0	0	
d.	On-demand transport services (Dial-a-Ride)	•	0	0	0	
e.	Park and Ride	•	0	0	0	
f.	Taxi tokens / travel vouchers	•	0	0	0	
g.	Community Transport	•	0	0	0	
h.	Other	•	0	0	0	
i.	If you offer "other" enhancements, please specify what these are					

20.	If the discretions in questions 18 and 19 are not offered to both statutory older and disabled
	people please say so here. You can also use this section to expand on the details of what you
	offer, explain concessions offered to non-statutory groups, variations across authorities within
	the scheme, or any other types of discretion not covered in this section.

A
▼

SECTION 8 - CONCESSIONS FOR YOUNG PEOPLE

Please answer questions 21 and 22 in this section, even if your TCA does not offer any concessions for young people.

21.	Do the main <u>bus operators</u> in your authority / scheme offer <u>commercial concessions</u> to young people? ψ										
	a.	2011/12	Yes	•	If you have answered Yes to this question please provide further information below.						
			No	0							

b. 2012/13 Yes O If you have answered Yes to this question please provide further information below.

No	•	A

22. Do you publish a Transport Policy Statement for 16-19-year olds?

Yes

If yes please provide details of the web link below.

No	0	۸
Don't Know	0	~

SECTION 8 - CONCESSIONS FOR YOUNG PEOPLE (CONTINUED)

- 23. This question is about concessions for young people offered by your TCA. If you offer these, please provide further details on the age groups covered, fare charged, time period covered, geographical restrictions and any other information as appropriate. Do not include the statutory travel to school responsibilities or contracted school services.
 - a. 2011/12



b. 2012/13



SECTION 9 - ADDITIONAL COMMENTS 24. If you have any comments on the data supplied, please let us know in the box below: SECTION 10 - SIGN OFF 25. Any information entered to this form is saved, so that you can enter figures in stages. When you have completed the return, please indicate this by ticking the box below. a. Final return complete - I confirm that the information supplied is accurate to the best of my knowledge ✓ b. Are any elements of this survey confidential? Yes ⊙ No O c. Please provide details of which questions are confidential. d. Name of person completing form (in case of queries)

e. Contact Email

f. Contact Telephone Number

Guidance for completing the 2012 Concessionary Travel Survey

This guidance accompanies the 2012 Concessionary Travel Survey. A link to the survey has been emailed to you, along with your username and password for accessing it.

You may find it helpful to read through this guidance before starting the survey and to have a copy to hand whilst working through the questions.

This document includes information on -

- About the survey
- Survey sections
- TCAs which are part of a concessionary travel scheme
- Answering the survey questions
- If you cannot supply all of the figures requested
- Navigating away from pages
- Supplying commercially sensitive information
- If you have any problems completing the survey
- Guidance notes for specific questions
- Copy of survey questions

About the survey

The aim of this survey is to seek information from local authorities on their concessionary travel schemes and reimbursement arrangements. The information is mainly used to refine DfT reimbursement guidance and inform concessionary travel policy.

The data will not be used to assess the validity of any existing reimbursement practices adopted by individual Local Authorities.

This survey was included in the DCLG 'Single Data List' which contains all data that local authorities should expect to provide to Central Government in 2012/13 (http://tinyurl.com/5tqvwe9).

The results of last year's survey were published by DfT in March 2012 (http://www.dft.gov.uk/statistics/releases/concessionary-travel-2010-11-and-2011-12/)

Survey sections

- 1. TCA / Scheme Details
- 2. Expenditure on Concessionary Travel
- 3. Concessionary and Other Local Bus Journeys
- 4. Concessionary Passes
- 5. Reimbursement Methods
- 6. ENCTS Expenditure and Additional Costs Reimbursement
- 7. Discretionary Concessions
- 8. Concessions for Young People
- 9. Additional Comments
- 10. Sign-off and Submission

TCAs which are part of a concessionary travel scheme

If your TCA is part of a scheme with multiple TCAs, we still ask that a return is submitted for each TCA, with data relating to that individual TCA. If there are any questions which you are unable to answer at individual TCA level, please contact DfT as soon as possible to discuss: concessionaryfares@dft.gsi.gov.uk or phone Fay Tuddenham on 0207 944 6104.

Answering the survey questions

The survey questions are a mixture of "yes / no" questions on what concessions you offer and questions asking for figures on journeys and finance.

We understand that some questions may be easier to answer than others and accept that some of the data supplied will be estimates. You are invited to supply details of the basis of their estimates (methodology, assumptions made, etc) and an assessment of the reliability of the figures/underlying data to help us when analyzing the results. You should also highlight where alternative definitions (to those specified in the guidance) have been used.

We are particularly keen that you focus your efforts on data items on reimbursement (concessionary trips, total reimbursement paid out to bus operators, average fares, reimbursement rates and additional costs) at TCA level.

If you cannot supply all of the figures requested

Where we have asked for a disaggregation of a total figure and you are unable to supply all of the elements of the total, please leave the boxes for the missing elements blank, rather than entering zero.

In these cases, if you can supply a different breakdown from that specified in the question (e.g. if you have been asked for the number of disabled passes and the number of companion passes, but you can only supply a figure for these two categories combined), please do so as part of your comments on the data.

Navigating away from pages

Where you have left any questions blank, a warning will pop up when you navigate away from the page. If you have entered all the information you can, please just press "continue" when this box appears.

Supplying commercially sensitive information

We appreciate that some of the information requested is commercially sensitive and there is an opportunity at the end of the survey to specify which of your survey answers this applies to.

Subject to fulfilling any statutory obligations, the Department will not make public any information that you have told us is commercially sensitive without prior consultation with the parties involved. If any of the information provided is commercially sensitive we would request that authorities seek written permission from the bus operator to supply such information to the Department.

If you have any problems completing the survey

In the first instance, please refer to the guidance this document and the "FAQ" button on the survey pages. If this does not help answer your question, please contact us.

Thank you for completing the survey

Guidance notes on specific questions

There are specific guidance notes / clarifications for some of the questions. These can be viewed by holding your cursor over the vicons in the survey. These notes have also been reproduced below. Note that there is not a guidance note for every question.

Question 2

If your TCA is part of a scheme with multiple TCAs, we still ask that a return is submitted for each TCA, with data relating to that individual TCA. If there are any questions which you are unable to answer at individual TCA level, please contact DfT as soon as possible to discuss.

Question 2c

Please name all other Local Authorities which are part of your scheme.

Question 4

NET CURRENT EXPENDITURE (NCE) is net expenditure on the whole travel concession service. This includes spend on statutory and discretionary concessions and is not limited to spend on bus concessions. NCE includes operator reimbursement, administration and employee expenses; net of fees and charges, internal recharges and other non-grant income. How much your finance department allocates to you from DCLG formula grant is irrelevant to this question. We are purely interested in net spending here.

Question 4a

These figures should be consistent with those provided in DCLG returns.

Question 4b

English National Concessionary Travel Scheme (ENCTS) is the statutory minimum travel concession in England.

STATUTORY MINIMUM TRAVEL CONCESSION is the minimum concession that authorities are required to offer to eligible older and disabled people, i.e. free local bus travel anywhere in England between 9.30am and 11pm on weekdays and at anytime at weekends and bank holidays. In London the statutory minimum concession for eligible older and disabled London residents is free travel on journeys on the London Local Transport Network (including buses, trams and trains) at any time at weekends and bank holidays and from midnight to 4.30am and the period from 9.30am to midnight on any other day.

Questions 4c & 4d

DISCRETIONARY CONCESSIONS are any travel concessions offered by the local authorities that are not ENCTS statutory minimum travel concessions.

ENCTS DISCRETIONARY CONCESSIONS are discretionary travel concessions offered only to ENCTS pass holders on production of their ENCTS pass.

OTHER CONCESSIONS fall into two categories: (1) travel concessions that are a substitute for the ENCTS pass such as travel tokens or senior rail cards, (2) travel concessions offered to non-ENCTS pass holders such as concessions for young people, the unemployed or people with disabilities who are not eligible for the statutory scheme

Question 5a

Include only bus journeys by ENCTS pass holders which are subject to reimbursement (both statutory and discretionary). Exclude journeys on other modes or by non-eligible people (e.g. youths).

Question 5b

Include only bus journeys by ENTCS pass holders under the statutory scheme (e.g. exclude journeys starting before 9.30).

Question 6

Estimates of bus passenger journeys originating in each local authority area were previously required by Department for Communities and Local Government as National Indicator 177. As this indicator ended in 2009/10, DfT now uses data from operators to produce estimates for each area which are published on DfT's website.

We appreciate as much information as you are able to provide here on a voluntary basis to compare with these figures, to understand trends in the local bus sector and for possible publication alongside the DfT figures.

Question 6a

Figures should count the number of boardings of registered local bus services, counting each separate bus boarding as one journey.

Question 6b

This total is fixed as the value entered in question 5a.

Question 6c

Please include youth concessionary journeys for which operators receive reimbursement from your TCA, but exclude statutory travel to school responsibilities or contracted school services.

Question 6d

Other concessionary journeys in this question refers to concessionary journeys that are not older/disabled/youth. An example would be journeys made under concessionary schemes for unemployed people.

Non-concessionary journeys are those for which your TCA does not provide reimbursement.

Question 8

A possible basis for calculation could be taking the average of the number of passes with valid expiry dates at the start and end of each financial year.

To avoid double-counting, a disabled person of eligible age holding a valid disabled pass should be categorised as 'disabled pass holder'. A disabled person of eligible age holding a valid older person pass should be categorized as 'older pass holder'.

A companion pass is one which entitles those accompanying disabled pass holders to free or discounted travel.

Question 9

Answer yes if you have agreements of a fixed sum over a fixed period with any bus operator.

Question 11a & 11b

The average fare forgone is used to calculate the revenue forgone. DfT guidance recommends the use of the Discounted Fare Method to calculate the average fare forgone. This method may not be appropriate in certain circumstances, in which case DfT guidance recommends the use of the Basket of Fares method to calculate the average fare forgone. If you have used either of these methods please tick boxes 11a or 11b.

Question 11c

The RF Calculator, based on the Single Demand Curve, is used to calculate the reimbursement factor. Users enter data on the change in fares between 2005/06 and the year of calculation in the DfT Calculator and the Reimbursement Factor is calculated automatically. There is a choice of two curves, one for areas with PTE characteristics and one for non-PTEs.

Question 11d

The DfT guidance and calculator provides a standard formula to calculate Marginal Operating Costs (MOCs) in pence per generated trip. The default value is 6.1p (2009/10 prices), with an option to vary the MOC value with average concessionary trip length. Please tick box 11d if you use the MOC element of the guidance of some or all of your operators.

Question 11e

The DfT reimbursement guidance and calculator provides a model to calculate Marginal capacity costs (MCCs) but this does not preclude the use of other methods (e.g. counterfactual or hypothetical network models). Please tick box 11e if you use the DfT model to estimate MCCs and specify whether you use the default values in the DfT guidance or local values.

Question 11f

PVR costs are exceptional and claim-based but the DfT guidance provides some advice on how to calculate PVR costs. Please tick box 11f if you have followed the guidance to estimate PVR costs.

Question 13

This should include reimbursement of concessionary travel on buses by older/disabled people only. Please also note that the reimbursement figure should be consistent with figures given in later parts of this survey. i.e. Total reimbursement to bus operators = Revenue Forgone + Additional Costs If this is not the case then please give details as to why in Q16.

Question 14a

REVENUE FORGONE is the revenue bus operators would have received from those concessionary passengers who would otherwise have travelled and paid for a full fare or discounted ticket in the absence of a scheme.

Revenue forgone = Average fare forgone x non-generated trips

Non-generated trips = Total observed trips at full fare x reimbursement factor.

Question 14b

AVERAGE FARE FORGONE is the average fare that bus operators would have received from concessionary passengers in the absence of the free fare concessionary scheme. It should include the impact of the different ticket types available for multiple journeys and discounted fares offered.

If the average fare is different across operators, please calculate a TCA average weighted by concessionary journeys [e.g. (OpA trips x fare + OpB trips x fare)/(OpA trips + OpB trips)].

Question 15a

GENERATED JOURNEYS are those journeys made by concessionary bus pass holders who are only travelling as a result of the existence of the scheme.

They are calculated as total observed concessionary journeys x Generation Factor (GF)

where GF = (1-RF) and RF is the Reimbursement Factor.

Question 15b

ADDITIONAL COSTS - where an operator's cost base rises as a result of carrying generated passengers, a TCA may be explicitly be paying for these costs through an identified payment. These costs may arise to cover extra fuel, wear and tear, etc (Marginal Operating Costs), as a result of an increase in service frequency (Marginal Capacity Costs) or as a result of additional vehicles being provided (PVR costs). Additional costs also include scheme administration costs.

Please note that the additional costs figure should be consistent with figures given in later parts of this survey (i.e. figures provided for questions 15bi to 15biv should sum to the additional costs figure provided). If this is not the case then please give details as to why in Q16.

Question 15bi

SCHEME ADMINISTRATION costs to be reimbursed to bus operators exclude pass production costs but include e.g. publicity, ticketing, software changes and management time. If scheme administration costs have been subsumed within the other cost categories in 15b, please leave the boxes for Q15bi blank and provide further details in Q16 to explain which of the cost categories include scheme administration costs.

Question 15bii

MOCs are the costs to a bus operator of carrying an additional passenger assuming a fixed level of service. The components of this costs comprise fuel, tyres and oil, maintenance and cleaning, insurance, information and additional time costs. They exclude operators' administration/management time.

Question 15biii

MCCs are the costs to a bus operator of carrying additional passengers and allowing the capacity of bus services to increase by using the existing bus fleet more intensively to provide that additional capacity through increased frequency.

Question 15biv

PVR COSTS are associated with the requirement to run additional vehicles in the peak period due to generated concessionary travel. These tend to be exceptional.

Question 17

The statutory minimum concession is free local bus travel anywhere in England between 9.30am and 11pm on weekdays and at anytime at weekends and bank holidays.

In London the statutory minimum concession for eligible older and disabled London residents is free travel on journeys on the London Local Transport Network (including buses, trams and trains) at any time at weekends and bank holidays and from midnight to 4.30am and the period from 9.30am to midnight on any other day.

Question 17c

Please answer Yes if you offer provisions for a companion travelling with a disabled person to obtain a free or discounted bus fare. Please specify whether the companion is entitled to free or discounted bus travel, whether there is a charge for the companion pass and whether there are restrictions on the categories of disabilities for eligibility.

Question 17d

Answer Yes if your authority/scheme offers concessions to young people (excluding the statutory travel to school responsibilities or contracted school services).

Question 21

This question concerns commercial concessions only i.e. those controlled/managed/funded by a bus operator. If possible please specify the name of the operator, the age group (e.g. 16-18) covered, the fare charged (free, half, flat), time period (term-time only/all year, 8.30-10.30) and any other relevant information. You will have an opportunity in Q23 to tell us about any youth schemes that your TCA controls/manages/funds.

Question 23

This question concerns only concessions controlled/managed/funded by the TCA/scheme. Do not include any commercial concessions offered by bus operators here. In 'Fare charged', please include information on whether the fare charged is a flat fare, half fare etc. In 'Other information' please add any other relevant information.

Question 25b

The Department appreciates that some of the information requested will be commercially sensitive. Please specify in Q25c which elements of the survey are confidential.

Subject to fulfilling any statutory obligations, the Department will not make public any information that you have told us is commercially sensitive without prior consultation with the parties involved. If any of the information provided is commercially sensitive we would request that authorities seek written permission from the bus operator to supply such information to the Department.