

ENVIRONMENT AND ACCESS PERFORMANCE IMPROVEMENT COMMITTEE

22 October 2003

REVIEW OF TRAVEL CONCESSIONS

REPORT OF THE DIRECTOR OF DEVELOPMENT SERVICES

Contact Officer: Matthew Hill Tel No: 01962 848 105

RECENT REFERENCES:

PTP75, Concessionary Travel, 30 November 2000

CAB422, Concessionary Travel, 2 October 2002

CAB570, Concessionary Travel Tokens Informal Member/Officer Working Group, 29 January 2003

PS86, Overview and Scrutiny Work Plan 2003/04, 30 June 2003

EA006, The Establishment of the Concessionary Travel Informal Group, 8 July 2003

EXECUTIVE SUMMARY:

At their meeting on 8 July 2003, the Environment and Access Performance Improvement Committee re-established the Concessionary Travel Informal Group to comprise of six Committee members and four officers. This Group investigated the complex nature of offering an alternative travel concession in light of the recent introduction of the Travel Concession (Eligibility) Act 2002.

The terms of reference of this Informal Group were to consider and recommend upon the long term future of the use of concessionary travel tokens and other strategic issues connected with concessionary travel in the district.

The group met on 1 September 2003 and 22 September 2003 to discuss various issues and offer the following recommendations to this Committee:

RECOMMENDATIONS:

- 1 That the Committee asks that officers produce a questionnaire, to be scrutinised by members of the Concessionary Travel Informal Group, that can be issued with travel concessions to establish where and how the travel concessions are being used and to report back to this Committee when enough useful information from these questionnaires has been collected.
- 2 That, on receiving information from the questionnaires regarding the use of travel tokens, the Committee re-establishes the Group to investigate the issue of local travel tokens and National Travel Tokens.
- 3 That Cabinet be recommended that the current £7 handling charge for travel tokens to be dropped for those over 80 years of age at an additional cost to the Council of £15,515 as a growth item.
- 4 That the Committee notes a verbal report from Mr Davies regarding the calculation of the value of the half fare bus pass to compliment the information provided within Appendix 3 and the results of his discussion with MCL regarding the variation of the half fare bus passes between district authorities in Hampshire.
- 5 That, on receiving information from the questionnaires regarding the use of travel tokens, the Committee re-establishes the Group to investigate the feasibility of extending the removal of the handling charge to those under 80 years of age.
- 6 That the Committee notes that in 2010 the Government intends to raise the eligibility of the pension age for both men and women to 65 years, and that this *may* require a further review of the travel concessions offered by the Council.
- 7 That Cabinet be recommended to continue to offer free fare bus passes for those who are registered blind regardless of their age.
- 8 That Cabinet be recommended to continue to offer travel concessions to those who are severely disabled regardless of their age.

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DETAIL:

1 Introduction

- 1.1 At their meeting of 8 July 2003, the Environment and Access Performance Improvement Committee re-established the Concessionary Travel Informal Member/Officer Working Group.
- 1.2 The membership of this group comprised of six members, drawn from the Environment and Access Performance Improvement Committee, and four officers.
- 1.3 The terms of reference of this Informal Group were to consider and recommend upon the long term future of the use of concessionary travel tokens and other strategic issues connected with concessionary travel in the district.
- 1.4 This Group met on 1 September 2003 and 22 September 2003 and the minutes of this meeting are attached as Appendix One and Two respectively.

2 Concessionary Travel Token Scheme

- 2.1 Under the Transport Act 1985, amended by the Transport Act 2000, Local Authorities in England and Wales must arrange for disabled and elderly persons to receive a half fare concession on local bus services subject to the person obtaining a bus permit which must be given free of charge.
- 2.2 Local Authorities also have a local discretion to offer further concessions on bus and other public passenger transport services if they wish.
- 2.3 Previous legislation linked the entitlement of elderly people to travel concessions to pensionable age as defined in the Pensions Act 1985. In other words, 60 for women and 65 for men.
- 2.4 The Travel Concessions (Eligibility) Act 2002 meant that from April 2003 men over 60 years are eligible for the half fare bus pass.
- 2.5 There is no obligation within the Acts to extend this eligibility to other travel concessions offered by the local authority. The only obligation is that should other travel concessions be offered, these must be made to both men and women of the same age.
- 2.6 The Council established an Informal Working Group to review the Concessionary Travel Token Scheme with an opportunity to consider whether to offer an improved service to users and whether any savings within the Concessionary Travel budgets can be identified.

- 2.7 Currently, the Council offers two forms of travel concession - the statutory half fare bus pass and the non-statutory travel token scheme. The travel token scheme is managed by Winchester City Council but it is run by a private company, National Travel Tokens.
- 2.8 Some local authorities within the Hampshire districts have already reviewed their travel concessions and decided to offer users their own brand of travel token. This has an advantage for the local authority in that payment for the tokens is only carried out when the token is redeemed, whereas National Travel Tokens are purchased prior to issue to users. It is also easier to determine how the tokens were spent if locally produced tokens are issued. National Travel Tokens do not have this facility.
- 2.9 There are however disadvantages with locally produced travel tokens. Local transport companies have to agree to use these tokens (sometimes these are national transport operators, which increases the difficulty of an agreement) and users may find that they cannot use the tokens outside of the district (as will be the case for users who live in the southern parishes and shop in Fareham or Portsmouth).

3 Conclusions of the Working Group

- 3.1 The informal member/ officer working group has investigated the issues regarding changing travel tokens from national to locally produced tokens; the age at which tokens are issued; and the handling charges that should be introduced.
- 3.2 *Changing from National Travel Tokens to Local Travel Tokens*
- 3.3 Information presented by officers during the review carried out by the group show that there is potential to make savings by changing from National Travel Tokens to local travel tokens. The principal saving arises by the fact that local travel tokens are only a financial burden to the authority when they are redeemed by the transport operators. National Travel Tokens have to be pre-purchased by the council, even if they do not get used.
- 3.4 However, the group also recognised that National Travel Tokens can be more flexible to the user compared to National Travel Tokens in that they are redeemable through transport operators across the Country. Local tokens can be redeemed only through operators that have an agreement with the Council, and although this can be extended to include operators based outside the Winchester District, this does not cover operators further afield.
- 3.5 The group recommends that the issue of whether to stay with local travel tokens or to keep National Travel Tokens should be investigated once the Concessionary Travel team has gathered information about users travel habits. The Group recommends that this should be reviewed once enough information about how and where users travel has been gathered.
- 4.0 *Providing free bus fares to those on Benefits who are over 60 years of age*
- 4.1 The Group felt that it should offer free bus fares to those who are over 60 years of age and are in receipt of certain benefits to assist in both social inclusion and to encourage more people to travel by bus.

- 4.2 However, current statistics held concerning half fare bus passes are not particularly helpful in predicting the likely demand for free fare bus passes for those on benefits, as recipients of half fare bus passes are not currently asked if they are in receipt of such benefits and therefore no records are kept.
- 4.3 Even if an educated estimate was made regarding the likely cost to the Council of a free fare bus pass for those over 60 years and on benefits, this would not reflect the exact cost. The precise cost is calculated by a third party consultant which bases this amount on a large number of factors - including the value of alternative travel concessions issued by the authority. This can be seen by the large variances in value of the current half fare bus passes between each district authority within Hampshire.
- 4.4 It was agreed that Mr Davies should raise concerns about these calculations and inter-district variances at the next AGM of the third party consultant to be held on 6 October 2003 and provide a verbal report to the Environment and Access Performance Improvement Committee. A brief explanation to how this is calculated is provided in Appendix 3.
- 4.5 However, if we make an educated estimate to the number of people who might claim a free fare bus pass (say 1000) and simply double the current value of the half fare bus pass (2 x £39.42), we can see that the cost to the authority would be large. This would have to be dealt with as a growth item by Cabinet and it would be unlikely to meet approval.
- 4.6 The Group therefore agreed not to recommend this change in policy to the Performance Improvement Committee at this stage. However, in an attempt to better estimate the likely numbers that would take up the free bus passes, it was agreed to ask applicants of the current half price passes whether they were in receipt of benefits. This would be incorporated into the questionnaire to be sent to all renewal applicants.
- 5.0 *Establishing how and where Travel Tokens are used*
- 5.1 The current travel token system used by Winchester City Council employs a third party company, National Travel Tokens Ltd, to provide and redeem the tokens. This is a national company and, despite requests from officers, is unwilling to change its methods to allow local authorities to identify where and on what form of transport the tokens are being used.
- 5.2 The Group discussed the possibility of conducting a survey to discover how and where the travel tokens were being used. It was agreed that the questionnaire should be carefully drafted so as to avoid confusion or create the fear that the service was to be reduced. It was therefore agreed that the officers should draft the questionnaire and email to it to the Group for comment. The final questionnaire would then be sent to all applicants seeking to renew their tokens and it would enquire whether the applicant was in receipt of benefits.
- 6.0 *Removal of Handling Charge*
- 6.1 The Group discussed the possibility of removing the travel token charge (currently £7). It was soon apparent that a blanket removal of the charge would result in more people claiming the tokens thus increasing the financial burden upon the Council. It

was also noted that there was no charge when tokens were first introduced, and some of those who claimed the tokens did not actually use them.

- 6.2 The group agreed that the handling charge should be removed for those who were over 80 years of age as this had social and safety related advantages.
- 6.3 Assuming that there would be an increase of 20% in the number of applicants who currently claim travel tokens and are aged over 80 years of age, this would cost an additional £15,515 to implement on top of the current budget of approximately £140,000
- 6.4 The group also recommended that the feasibility of extending the removal of the handling charge to those under 80 years of age should be investigated at a later date.
- 7.0 *Raising the eligibility age for travel tokens from 60 to 65 in one year increments over a five year period*
- 7.1 The Group considered whether that the eligibility age should be raised from 60 to 65 in one year increments over a period of five years which would save £17,000. However, the Group concluded that this was likely to cause concern in the community and noted that changes in government legislation due to become effective in 2010 would raise the pension age for both men and women to 65 years, with the result that any Council led rationalisation would only be fully effective for four or five years. In the light of this and the relatively small amount of savings the change would make, the Group agreed to not recommend this proposal to the Committee.
- 8.0 *Changing from National Travel Tokens to Local Tokens*
- 8.1 Although there could be advantages in running costs and tracking where, when and how travel tokens are used, the Group felt that this did not outweigh the fact that the national travel tokens offer greater flexibility in cross boundary travel and was an already established scheme with agreements with local and national transport operators.
- 9.0 *Offering Travel Tokens to certain disadvantaged groups under 60 years of age*
- 9.1 The Group noted that concessionary travel was available to those under 60 years of age if they were severely disabled. It was agreed that it would be too costly to allow other groups with minor disabilities or receiving certain types of benefits to be allowed access to concessionary travel tokens. Therefore there was proposed no change in respect of this policy.
- 10.0 *Provision of Free Fare Bus Pass to those who are registered Blind*
- 10.1 The Council provides free fare bus passes to those who are registered blind. The Group endorsed the continuation of this policy.

OTHER CONSIDERATIONS:

11 CORPORATE STRATEGY (RELEVANCE TO):

To maintain budget stability through strong performance and resource management while accommodating the requirements of new legislation and duties.

To deliver 'Best Value' in all our services.

12 RESOURCE IMPLICATIONS:

The recommendations listed above will cost the Council approximately £15,515 in addition to the current expenditure on travel concessions.

There would be an increase in human resources to implement these recommendations which can be absorbed by existing staffing costs

BACKGROUND DOCUMENTS:

File 094000 Concessionary Travel

File 012501 Concessionary Travel Best Value Review

APPENDICES:

- (1) Minutes of the Concessionary Travel Tokens Informal Member/Officer Working Party, held 1 September 2003
- (2) Minutes of the Concessionary Travel Tokens Informal Member/Officer Working Party, held 22 September 2003
- (3) Half Fare Bus Pass Review Methodology, MCL Transport Consultants Ltd, September 2003

CONCESSIONARY TRAVEL INFORMAL GROUP

1 September 2003

Attendance:

Councillors:

Bailey (P)
Bidgood (P)
Busher (P)

Hatch (P)
de Peyer (P)
Wright (P)

Officers:

Alan Jowsey - Head of Traffic and Transport

Matthew Hill - Sustainable Transport Officer

1. **APPOINTMENT OF CHAIRMAN**

Councillor Bailey was appointed Chairman of the Informal Group for the remainder of the 2003/04 municipal year.

2. **TERMS OF REFERENCE**

The Informal Group noted the terms of reference as set out.

3. **REVIEW OF TRAVEL CONCESSIONS**

The Informal Group raised the following points during discussion:

- The philosophy behind tokens was that there was a diversity of travel usage, notably in some rural areas where bus services were less frequent. It was noted that although Winchester District was more rural, the indication from Eastleigh Borough Council was that approximately one-third of tokens were used on buses. This was probably reflective on that of Winchester District.
- The Group agreed to work upon the basis that there was to be no increase in expenditure regarding Concessionary Travel and that if savings could be identified then this be utilised to increase entitlement to those most in need.
- Mr Hill explained the costs for bus passes and tokens and the recouping via subsidy claims by the bus companies. In addition, the benefits and constraints of National and Local Travel tokens was explained.
- The benefits and drawbacks of having identification numbers and/or 'use by dates', pro-rata allocation or even using electronic cards was discussed.

- It was agreed that a 'blanket' allocation of tokens to those only receiving benefits should be discouraged as there was many 'marginal' cases of entitlement that would mean that many would be unable to claim tokens. In addition, more residents would then wish to claim their bus pass entitlement, which costs the Council more per head.
- Investigations regarding token usage were discussed and whether an indication could be gained from researching those redeemed, or by commissioning a questionnaire.
- The Group discussed whether the encouragement of 'take-up' for those aged over 75 could be created by removing handling fee for those aged over 75 and reduce allocation to those aged 60-65 years (whilst keeping bus pass entitlement). Furthermore, it could be considered that the bus pass could be given to all benefit claimants, or to double the value of tokens for those on benefit, and over 60 years. It was noted that this would have significant resource implications.
- The Group considered that some investigation should be given to how the Council should ensure that tokens were used so that a loss is not represented to the Council, as currently occurs.
- The Group noted that although Local Tokens were the preference, there should be some negotiation for their use outside the district to compensate with the anomalies of boundaries with that of healthcare trusts etc and nearest urban centres. This was noted as particularly relevant to those residents of Whiteley.

4. **SUMMARY**

The Informal Group noted that it was desirable to improve access to subsidised public transport to the over 80s, and restrict usage for those aged 60-65.

Members of the Informal Group were requested to consider other potential scenarios to benefit sectors of the population for discussion at the next meeting.

An approach should be made to Eastleigh BC and Basingstoke & Deane DC regarding their negotiations with operators regarding token usage outside the district and best value regarding subsidy.

The meeting commenced at 2.30pm and concluded at 4.15pm

CONCESSIONARY TRAVEL INFORMAL GROUP

22 September 2003

Attendance:

Councillors:

Bailey (P)
Bidgood
Busher (P)

Hatch (P)
de Peyer (P)
Wright (P)

Councillor Beveridge, Portfolio Holder for Transport

Officers:

Alan Jowsey – Head of Traffic and Transport
Matthew Hill – Sustainable Transport Officer
Fred Lyon – Assistant Director of Finance
Basil Davies – Head of Parking

5. **MINUTES**

It was noted that the minutes of the previous meeting had not been circulated. However, in considering those tabled at the meeting, it was agreed that the request for information on the cost of providing totally free bus passes, and doubling the number of travel tokens, for over 60year olds on benefits had not been recorded.

Mr Jowsey commented that the cost of doubling the number of travel tokens available to those over 60 and on benefits would be twice the current cost of £30,082 (ie £60,164).

Mr Davies explained that the current statistics held concerning the half price bus fares were not particularly helpful in predicting the likely demand for free passes, as the applicants were not asked if they were in receipt of benefits. Mr Hill clarified that the relevant benefits were Income Support or Housing and Council Tax Benefits.

With regard to the potential cost of each free bus pass, it was noted that this was likely to exceed double the cost of the half price pass (ie: £39.42 X 2). The precise cost was calculated by MCL Consultants on behalf of the County and, following a discussion in which the Group noted the variances between the cost of the half price passes between local authorities, it was agreed that Mr Davies should raise concerns about this calculation at the next AGM to be held on 6 October 2003 and report to the Environment and Access Performance Improvement Committee.

Mr Jowsey also explained that cost of providing free bus fares to those on benefits over 60 years old was hard to calculate, as it was difficult to predict the numbers likely to take up this option. However an estimate could be calculated pro-rata on the

number of travel tokens used by those on benefits. Mr Jowsey commented that 1000 eligible people at a cost of £100 each could request this, giving a net additional cost of £60 per person after deducting the saving of £40 for the existing half fare bus passes. However, if recommended to Cabinet, the request would be dealt with as a growth item in what was likely to be a tight budgetary process.

The Group therefore agreed not to recommend this change in policy to the Performance Improvement Committee at this stage. However, in an attempt to better estimate the likely numbers that would take up the free bus passes, it was agreed to ask applicants of the current half price passes whether they were in receipt of benefits. This would be incorporated into the questionnaire to be sent to all renewal applicants – see below.

A Member also raised questions on bullet points two and five of the minutes of the previous meeting, but the Group agreed the minutes to be a correct record.

6. **REVIEW OF TRAVEL CONCESSIONS – SUPPLEMENTARY REPORT TO THE CONCESSIONARY TRAVEL INFORMAL GROUP**

The Group discussed paragraph 2.1 of the report and the possibility of conducting a survey to discover how and where the travel tokens were being used. It was agreed that the questionnaire should be carefully drafted so as to avoid confusion or create the fear that the service was to be reduced. It was therefore agreed that the officers should draft the questionnaire and email to it to the Group for comment. The final questionnaire would then be sent to all applicants seeking to renew their tokens and it would enquire whether the applicant was in receipt of benefits.

The Group discussed paragraph 2.2 of the report – the possibility of removing the travel token charge (currently £7) for those over 80 years. Following a debate, the Group agreed to the proposal and, in noting the greater number of people who would benefit from this change who were under 80, agreed to recommend that the feasibility of extending this to 75 years and younger be further investigated at a later date.

The report also considered whether that the eligibility age should be raised from 60 to 65 in one year increments over a period of five years which would save £17,000. However, the Group concluded that this was likely to cause concern in the community and noted that changes in government legislation due to become effective in 2010 would raise the eligibility to 65 years, with the result that any Council led rationalisation would only be fully effective for four or five years. In the light of this and the relatively small amount of savings the change would make, the Group agreed to not recommend this proposal to Committee.

At the request of the Chairman, Councillor Beveridge commented that the removal of the charge to those over 80 had social and safety related advantages whereas the overall benefit of providing tokens to all 60 year olds was questionable.

The Group discussed paragraph 2.3 and the possibility of converting to a locally run travel tokens scheme and noted the experiences of Basingstoke and Deane District and Eastleigh Borough Councils who had both moved from the nationally run scheme. Members noted that the nationally run scheme was operated by Stagecoach but agreed that the option of locally run travel tokens should not be further explored until further information from the questionnaire is available. The

Group also noted the lack of flexibility it offered users over the national scheme and that it could limit the travel options for residents who lived near the district's boundaries.

With regard to paragraph 2.4 of the report, the Group noted that concessionary travel was available to those under 60 years old if they were severely disabled and proposed no change in respect of this policy.

The Group also noted the figures set out in the report at paragraph 2.6 that illustrated the number in age bands that had taken up the half price bus tokens in the period August 2002 – August 2003.

Mr Jowsey explained that the Council provided free fare bus passes to those who are registered blind and the Group endorsed the continuation of this policy.

Mr Hill presented to the Group a map that illustrated where the concessionary travel users lived. However, the Group noted limitations with the format of the map and the costs that would be involved with further analysis and therefore recommended that no further action be taken on this.

At the conclusion of the debate, Members thanked Officers for their work and Mr Jowsey confirmed that their recommendations would be reported to the next meeting of the Environment and Access Performance Improvement Committee and then Cabinet.

The meeting commenced at 2.30pm and concluded at 4.15pm

Chairman

Half Fare Bus Pass Review Methodology, MCL Transport Consultants Ltd, September 2003

Introduction

The principal cost element of a concessionary fares scheme is the reimbursement that must be paid to the transport operators who carry passengers at the required concessionary fares. This equates to the net revenue foregone by the transport operators. The scheme uses net revenue foregone as both the means of allocating costs between the funding authorities and the means of apportioning reimbursement to individual transport operators.

Net revenue foregone is defined as the 'loss' of income suffered by the transport operators by allowing people to travel at concessionary fares, measured against what they would have received in fares had no concessionary fares been available.

In practise this is measured as the difference between the equivalent 'full' fare and the concessionary fare actually paid. This is then subject to an adjustment to take account of generated travel and other fares discounts that would otherwise be available. The adjustment for generated travel takes into account both the disallowance for any reimbursement in connection with generated trips and the additional cash the operator receives for such trips direct from the passenger (i.e. from the fare, if any, they pay)

Measuring Net Revenue Foregone

One of the key developments enabling the accurate measurement of revenue foregone has been the increasingly widespread availability of detailed information from operators' electronic ticketing machines (ETM's). Over 90% of all journeys made by users of the Hampshire Farepass are recorded on ETM's

Some surveys are still required to enable reasonable estimates of revenue foregone to be made where ETM data is not available. It is also necessary to carry out 'audit' surveys to check the accuracy of ETM data from time to time.

Hence, route-by-route, operator-by-operator, we continually monitor revenue foregone throughout the year. Data from ETM's typically provides information on the fare actually paid and the equivalent 'full' fares for each ticket sold. We can thus calculate the gross revenue foregone directly from this and, by applying the standard 'generation' adjustment, the net revenue foregone. The generated travel value varies between 14% and 30% in respect of half-fares depending upon the area served by individual services.

Revenue foregone data is held in a database from which we can extract reports for any required time period, operator, route or, in certain cases, types of service.

Allocation of Revenue Foregone to Source Area

It is a primary objective of the scheme to ensure that each district bears the cost, and only that cost, it should properly bear, i.e. that arising from the use of passes issued to its residents. It is therefore important to identify the level of revenue foregone caused by passholders from different districts or source areas, as we call them.

When tickets are issued for concessionary fares, no data is retained to identify the source area of the pass being used. Although technically possible, this would be operationally very

difficult for the operators to achieve with sufficient accuracy and would require far better identification of the issuing district on the pass.

There are technologies (for example, 'smartcards') available to overcome these problems but, at present, their cost would outweigh the benefits if brought in for this purpose alone. In the medium term, the situation could be very different and it is important that the scheme keeps new technologies under review.

In the meantime we continue to use a survey-based method to apportion the total revenue foregone between the different source areas. On a carefully selected sample of services across the county, these surveys identify the incidence of use of passes from different source areas (i.e. districts). Factors derived from these surveys are used to apportion the measured total of net revenue foregone between each source area. The results of this analysis are now reported each year in the Year End Report and this analysis is used as the basis for the updated estimates and projections.

The ETM method of measuring revenue foregone does not, for technical reasons, include the revenue foregone arising from the use of free travel passes. From previous survey work, we have data upon which we can base a reasonable average valuation of these passes in relation to the half fare pass. We thus add a free travel element to the revenue foregone arising from each district which is based on the free travel pass valuation and the number of such passes issued by each district concerned.

Future Projections of Revenue Foregone

Both the updated estimates for the current year (2003/4) and projections for the forthcoming year (2004/5) are based on the out-turn analysis of revenue foregone for 2002/3 as set in the last Year End Report. It is, however, necessary to make a number of assumptions to reflect the routine effects of fares increases and to take account of underlying growth trends in pass take-up and revenue foregone.

Calculation of Pass Prices

Once we have produced the projections of net revenue foregone for a given year, the process of calculating pass price is relatively simple. For each district, we calculate a corresponding pass take-up estimate for the same period. The reimbursement element of the pass price for each district is calculated by a simple division of the projected total revenue foregone by the pass take-up estimate for each district.

The contingency and central administration elements of pass prices are calculated on a standard basis for all districts based on the total annual funding requirement for these items. Hence another simple division of the total funding requirement by the total, projected pass take-up is made to derive a simple supplement per pass that is added to the reimbursement element. This means that any contingency and central administration costs are shared pro-rata to pass take-up.

Take-up Estimate

Take-up estimates are based on the latest actual take-up figures available, adjusted by the growth and other factors relevant to take-up. The older population in Hampshire is growing at a rate that will increase over coming years: 2.10% between 2002/3 and 2003/4 and 2.20% between 2003/4 and 2004/5, rising to 3.73% between 2005/6 and 2006/7.

Further growth has arisen from the extension of statutory eligibility to include males aged 60 to 64 with effect from 1 April 2003. In addition, the impact of the Transport Act 2000 is still being seen by continuing growth, more so in some areas than others. Whilst it is still too early to be clear on the exact 'shape' of the growth curve, there is strong evidence of a continuing but decaying growth rate in take-up, approaching a limiting value (i.e. an upper limit on the take-up ratio). This limiting value appears to follow a reasonably logical pattern, being higher in urban areas and lower in rural areas. In some rural areas there are signs that the limiting value may already have been reached and the growth rate is low. We have projected take-up growth for each authority, based on an extrapolation of the growth curve to date and the decay factor implied therein.