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Evaluation of the National Concessionary Travel Scheme for Older and Disabled People

Final Report

Executive Summary

Introduction

The National Concessionary Travel Scheme for Older and Disabled People (the Scheme) was introduced in April 2006. The Scheme is accessed via a National Entitlement Card (NEC) which provides free bus travel to cardholders with free travel on registered local and long-distance bus services throughout Scotland, at any time of the day for any number of journeys.

There are five separate NEC types:

- over 60
- disabled
- disabled plus companion (+1)
- sight impaired
- sight impaired plus companion (+1)

Bus operators are reimbursed by Transport Scotland for carrying cardholders. More than 140 bus operators in Scotland participate in the Scheme.

In August 2025, Transport Scotland commissioned an independent evaluation of the Scheme. The aims of the evaluation were to:

- understand how the Scheme works, who is using it, how it is being used and the benefits it brings
- identify any differences in usage and experiences between groups of cardholders
- undertake a value for money assessment in order to understand the value of benefits delivered through the Scheme

The evaluation was focused largely on the use and impacts of the Scheme, although a small component considered how the Scheme operates in practice.

The evaluation included a survey and series of focus groups with cardholders, interviews with bus operators and other stakeholders, analysis of existing secondary data, and a value for money assessment. Overall, 2,502 cardholders responded to the survey, which was largely hosted online, and 65 cardholders took part in focus groups (or one-to-one interviews). Six bus operators provided feedback via interview or in writing, and two third sector organisations were interviewed.

This report details the findings of the primary data collection and secondary data analysis, while the Value for Money Assessment is available in a separate report. While some tables are included in the body of the main report and in the Appendices, a separate Annex document is also available which includes additional tabular results from the cardholder survey.

The following percentages are based on those respondents that answered the relevant survey questions. Please note that due to the sampling methodology, the survey findings provide insight into the views and experiences of respondents but cannot be generalised to the wider population. No statistical testing has been conducted and differences between groups of respondents may reflect sample variability.

Unless otherwise specified, references in the report to disabled cardholders/cards relates to the type of NEC held by a person and incorporates all of the following NEC types: disabled; disabled plus companion (+1); sight impaired; sight impaired plus companion (+1).

To ensure the research materials (e.g. survey questionnaire) were accessible to participants, the term “free bus pass/bus pass” was used, as this is more readily and easily understood, and reflects what the NEC and the Scheme is referred to colloquially. When reporting directly on the survey findings, quoting the survey question and response options, and providing quotes from the focus groups and interviews, “ free bus pass/bus pass” is used throughout the report to ensure consistency with what participants were asked about and their responses. Elsewhere in the report, NEC, card or Scheme is used depending on the context to align with Transport Scotland and other stakeholder terminology.

Cardholders and use of the Scheme

The total number of cardholders increased from nearly 1.3 million at 31 March 2017 to nearly 1.56 million at 31 March 2025 (the maximum number of years for which data was available). Meanwhile, the number of journeys made decreased, from 140.85 million in the financial year 2016-2017 to 108.57 million in 2024-2025. Both the numbers of cardholders and journeys were impacted by the Covid pandemic, but while the number of cardholders had more than recovered, the number of journeys made using the NEC remained lower than pre-pandemic levels. This in line with overall trends in bus passenger journey numbers in Scotland following the Covid pandemic. More information can be found in Scottish Transport Statistics.

The number of cardholders by Scottish Index of Multiple Deprivation (SIMD) deciles shows that the number of disabled cardholders was higher in more deprived areas.

Conversely, the number of over 60 cardholders and the uptake of this type of card was higher in less deprived areas.

Over half of the survey respondents (59%) used their free bus pass about once a week or more often, while 18% had used it only a few times or not at all in the last 12 months. Disabled cardholders were more likely to use their free bus pass more often, with higher instances of multiple uses per week (55%), compared to those who held an over 60 card (34%). Similarly, those who were finding things difficult financially were more likely to use their free bus pass multiple times per week (56%) compared to those who managed very or quite well financially (34%).

The Scheme was used by most survey respondents to support social and leisure activities, followed by shopping and personal business, and for reaching health and medical appointments (these were also the most frequent types of journeys made). However, there were differences by card type. Those with an over 60 card were more likely to use their free bus pass for social and leisure purposes (82%) compared to those with a disabled card (64%). Meanwhile, disabled cardholders were more likely to use it for health and medical appointments/services (73%), just to get out (39%), for commuting (23%) or other work related travel (10%), and for education/training (21%) compared to those with an over 60 card. Focus group participants across different sessions outlined similar patterns of use to survey respondents, with shorter, local journeys being made most often.

The NEC can be used to access additional benefits. These are determined and provided for by local authorities and other organisations rather than Transport Scotland. This can include age verification/ID, discounts on other public transport and to services, activities or attractions, and access to library and leisure services. The evaluation feedback showed that knowledge of other uses/benefits of the card were highly mixed, and there was some criticism that different people are able to access different benefits, either based on the type of card they had or where they lived.

Meeting the expected outcomes

Transport Scotland developed a logic model to guide the evaluation. This identified the expected short, medium and long term outcomes for the Scheme. Key findings related to each of the outcomes are considered in turn below.

Reduction in carbon emissions

It was expected that the Scheme would result in an **increase in bus usage** (both for new and existing journeys), along with **modal shift from car to bus** and a

reduction in car kilometres. This would, in turn, be expected to result in a reduction of carbon emissions.

While the evaluation findings did not consider carbon emissions directly, feedback from cardholders provided strong evidence of both an increase in bus use and a reduction in car (and taxi) usage.

Most survey respondents (81%) reported using the bus more often because of the free bus pass. This was consistent for both over 60 and disabled cardholders. It had also encouraged modal shift away from car use. Overall, 61% of all respondents stated they used a private car less often because of the free bus pass, with 64% of those with an over 60 card and 53% of disabled cardholders travelling by private car/vehicle less often. Meanwhile, 76% of those who had access to a private vehicle whilst holding their free bus pass noted that they used their vehicle less often, which was again consistent for both over 60 and disabled cardholders. In addition, just over half (55%) of all respondents noted that they used taxis less often because of the free bus pass, with 61% of disabled cardholders, and 51% of those with an over 60 card using taxis less often.

Across both the survey comments and focus group feedback, cardholders reported travelling by bus more frequently for both essential and existing journeys, as well as for new journeys, including travelling further afield than they would have gone without the Scheme. Even where cardholders had access to private vehicles, it was evident that many opted to use the bus due to cost, convenience and to reduce stress compared to driving.

Improved health, mental health and wellbeing

A key aim of the Scheme was to improve the physical health, mental health and wellbeing of older and disabled people. Cardholders overwhelmingly agreed that the Scheme met this aim, at least where access to high quality, reliable and frequent bus services were provided.

There was strong evidence across the survey and focus group feedback that the Scheme had positively impacted cardholders' physical health, mental health and wellbeing. Overall, 57% of survey respondents either agreed or strongly agreed that they were more active because of the free bus pass, while 52% either agreed or strongly agreed that the free bus pass had improved their mental health and wellbeing. This was particularly the case among the disabled cardholders, with 66% agreeing that they were more active, and 68% agreeing that it had improved their mental health and wellbeing, (compared to 52% and 44% respectively of those with an over 60 card).

In addition, survey and focus group respondents discussed the positive impact that getting out and being in social spaces had on their wellbeing, often linked to the outcomes below.

Improved confidence, freedom and independence

The evaluation findings indicate that the Scheme delivers on the aim to improve confidence, freedom and independence.

Many survey respondents either agreed or strongly agreed that the free bus pass gave them independence/freedom (69%), as well as the confidence to travel (58%). Again, these gains were felt slightly more strongly among disabled cardholders (81% and 70% respectively) compared to those with an over 60 card (62% and 52% respectively).

Across the survey and focus group comments, cardholders repeatedly highlighted feelings of freedom, independence, autonomy, choice and confidence provided by their access to free bus travel. They indicated that the Scheme meant they could travel as and when they needed to, and removed the feeling of being a burden to others, either financially or practically. Many had travelled further afield, to places and areas they would not have gone to otherwise, with some exploring across Scotland. Cardholders were less nervous to travel due to the removal of cost barriers, and said they would not feel stuck while travelling with their NEC.

There was also evidence that the companion NEC supported disabled children and young people to become more confident and independent in their travel as they got older. Companion cardholders reported that their card gave them the confidence to travel, made them feel safer, and meant they could travel as often as required without having to worry about the cost of the companion's ticket or feeling like a burden by asking the companion to pay their own fare.

Reduction in social isolation

The evaluation provided strong evidence that the Scheme helped to reduce social isolation among cardholders.

Survey respondents largely agreed or strongly agreed that the free bus pass got them out/out more often (63%), and that they felt less isolated or lonely because of the free bus pass (51%). This was greater among disabled cardholders (79% and 66% respectively), compared to those with an over 60 card (54% and 42% respectively).

Comments among survey and focus group respondents also stressed that the Scheme reduced social isolation and loneliness. Many suggested that they made trips they would not otherwise have made, and indicated that they would not get out as often if they did not have their NEC. Free bus travel allowed them to meet family and friends more often, even when they lived some distance apart. It also allowed cardholders to meet up with their peers, join clubs, and be part of a wider community (which was particularly important for some disabled people). It also supported people during changing circumstances (such as newly diagnosed illnesses/disabilities, coping with bereavement, etc.), helping them to access support, to reintegrate socially and build their confidence.

Even where the purpose of the journey was not a social activity, some noted that they would meet and speak to other passengers on board the bus. This social aspect of bus travel was considered important in combating loneliness and isolation for some older and disabled people.

Increased physical activity levels

There was mixed feedback regarding the impact of the Scheme on physical activity levels.

Many survey respondents (60%) felt there had been little change in terms of their personal levels of walking, and 12% walked less often as they took the bus rather than walking short distances. However, 28% suggested they walked more because of the free bus pass (either to get to/from the bus, because they now got out more often, or used the pass to access more active leisure pursuits). These results were relatively consistent between those with an over 60 card and those with a disabled card.

As noted above, 57% of survey respondents also said they were more active because of the free bus pass. There was also evidence across the survey and focus group comments that the Scheme was used to support active pursuits, such as going to the gym, taking part in sports and accessing parks or the countryside for walks.

Reducing inequalities

Reduction in travel costs

The evaluation findings showed that the Scheme had reduced travel costs for cardholders and removed the financial barrier to travel.

Most survey respondents (93%) agreed that the free bus pass saved them money in the last 12 months, with results largely consistent by card type. However, the amounts that respondents thought they saved varied. Disabled cardholders were more likely to think it saved them higher amounts of money (i.e. over £50 and over £100) compared to those with an over 60 card. These cost savings helped with household finances, and enabled cardholders to better afford other essentials. Companion cardholders also highlighted the cost savings as neither they nor their companion needed to pay. This removed the financial barrier to travel, and removed anxiety for cardholders who required support to travel.

One third (33%) of survey respondents also said that their main reason for choosing to take the bus was because it cost less than other travel options/was free. This was a larger driver for those with an over 60 card (37%), while a lack of alternative travel options was the main driver for disabled cardholders (47%). In general, both survey and focus group respondents felt that the Scheme had removed the financial barrier to travel.

Access to social and leisure activities

There was strong evidence that the Scheme helped to improve access to social and leisure activities for cardholders. Overall, the most commonly cited ‘main journey purpose’ (i.e. the journey made most often) in the last 12 months was for access to social and leisure activities (35% of frequent users, i.e. those using the free bus pass around once a month or more). The highest proportion of survey respondents also said they used the free bus pass for this reason (75% of frequent users). However, there were clear differences by card type.

Eighty-two percent of respondents with an over 60 card had used the free bus pass for this purpose in the last 12 months, and nearly half (47%) stated this was the type of journey they made most often. Conversely, for disabled cardholders, social and leisure activities was the third most popular use of the free bus pass, behind healthcare and shopping and personal business. The majority (64%) of these cardholders reported using the free bus pass for social and leisure purposes and 18% indicated that this was their most common journey type.

There was also evidence that the Scheme helped cardholders to socialise and to access leisure activities more often. Almost three-quarters (74%) of disabled cardholders agreed or strongly agreed with this along with 57% of those with an over 60 card.

The survey and focus group comments confirmed that a wide range of different social and leisure activities were accessed. Many used the Scheme to socialise, either travelling with friends and family or to meet them, while several also used it to support hobbies or to attend sports activities/clubs. Some also noted that they used the Scheme to travel significant distances to stay in touch with/meet friends and family, which they would not do otherwise.

Access to services, including health

There was strong evidence that the Scheme helped to improve access to services for many cardholders. One of the main uses of the Scheme in the last 12 months was to access services, including shopping and personal business, as well as healthcare and medical services.

Around two thirds (67%) of frequent users (i.e. around once a month or more) used the free bus pass for shopping and personal business in the last 12 months. This was the second most common use (behind social and leisure purposes).

Meanwhile, over half (56%) of frequent users indicated that they used the free bus pass to access healthcare in the last 12 months. This journey purpose was among the top three types of journeys made, and the most common journey purpose for disabled cardholders. Similarly, half of all survey respondents (50%) either agreed or strongly agreed that the free bus pass had improved their access to healthcare. Access was more greatly improved for disabled cardholders, where 70% either agreed or strongly agreed that the free bus pass had improved access to healthcare, compared to 38% of those who held an over 60 card.

For many, the Scheme was a vital resource to allow them to make these journeys. Without it, several survey and focus group respondents suggested that they would not be able to attend medical appointments, would either shop less often and have to carry heavier bags home, or would have to rely more on online deliveries. Taxis would also be used more, incurring higher costs.

Increase in domestic tourism (day trips and holidays)

There was evidence that the Scheme was used for domestic tourism, including day trips, weekends away and longer holidays around Scotland. One third (33%) of survey respondents had used the free bus pass for this reason in the last 12 months, with relatively consistent results by card type. Many survey and focus group respondents also discussed travelling more often in general and travelling to new and different destinations because of the free bus pass, including for days out and holidays. The ability to use it on long-distance services and multiple modes (e.g. ferries and trains, where applicable) was welcomed, as this allowed cardholders to travel further afield.

Access to education, work and volunteering

There was evidence that the Scheme had improved access to work, volunteering and education for some cardholders:

- 27% of survey respondents agreed or strongly agreed that the free bus pass had improved their access to **volunteering** opportunities.
- 20% of survey respondents agreed or strongly agreed that the free bus pass had improved access to **education and training**.
- 18% of survey respondents agreed or strongly agreed that the free bus pass had improved access to **employment** opportunities.

Across all aspects, the gains were greater for disabled cardholders, where around a third agreed that access had been improved in each case compared to those with an over 60 card where between 23% (for volunteering) and just 9% (for employment) noted improved access.

Among the survey and focus group comments there were reports of cardholders finding new jobs, accessing part-time work, staying in work longer, accessing and maintaining volunteering opportunities, accessing university, and parents/ grandparents being able to take children to school because of the Scheme. It was suggested that the Scheme had opened up new geographical areas to some cardholders, and made travel for these purposes cost-effective and sustainable.

Feeling safe using the bus

The evaluation provided mixed results with regard to whether cardholders felt safe using the bus.

While most (78%) survey respondents agreed or strongly agreed that they felt safe travelling by bus, some (45%) agreed or strongly agreed that there was anti-social behaviour on buses. There were however, differences by card type, with disabled, cardholders less likely to feel safe (65%) and more likely to think there was anti-social behaviour (56%), compared to those with an over 60 card (85% and 39% respectively).

Among the qualitative feedback (across both the survey and focus groups), cardholders discussed feeling unsafe due to anti-social behaviour and the number of Young Persons' Scheme cardholders now using buses. Issues around feeling unsafe at bus stops or interchanges that were poorly maintained or poorly lit were also reported in some cases.

Reasons for not using buses or the Scheme more often

Survey respondents were asked about their reasons for not using the bus more often, with multiple responses possible. Different questions were asked depending on whether respondents used the free bus pass about once a fortnight or more (i.e. frequent users, n=1,709) or less than once a fortnight (i.e. less frequent users, n=793). While a long list of options were offered, responses were also collated into themes for analysis purposes.

The reasons for not using the bus more often were largely consistent between more and less frequent users, with the most common issues being related to **service provision** (56% of frequent users and 61% of less frequent users identified one or more related issues). This included buses not running when or as often as needed, a lack of direct routes, that buses were unreliable, and that they took too long. These issues were also commonly discussed by focus group respondents as limiting their use of the Scheme.

Issues relating to the **on-board environment** (such as being busy, concerns about anti-social behaviour, not feeling safe, and concerns about illnesses) were also noted by 27% of more frequent users and 21% of less frequent users. Comments from some cardholders (of all types) also suggested that the busyness of services or anti-social behaviour resulted in them avoiding certain bus services and/or travelling by bus at certain times of day. Many of these cardholders attributed this to the introduction of the Young Persons' Free Bus Travel Scheme (Young Persons' Scheme).

Accessibility issues were highlighted by 17% of frequent users and 18% of less frequent users. These included difficulty physically accessing the bus, buses not being suitable for the respondent's condition, a lack of information/accessible information to help journey planning, and information during journeys not being available or accessible. Again, these accessibility issues were also commonly discussed across the focus groups. In addition, in both survey and focus group feedback, several disabled cardholders described negative experiences where they felt judged, or had been questioned/challenged by bus drivers regarding the legitimacy of their disability or right to access free bus travel (especially companion cardholders).

It should be noted that accessibility issues were reported despite the Public Service Vehicles Accessibility Regulations (PSVAR) requiring that buses and coaches be accessible to disabled passengers. The Public Service Vehicles (Accessible

Information) Regulations 2023 (PSVAIR) now mandates the provision of audible and visible information on board local bus and coach services in Great Britain.

When considering the full list of reasons, the survey responses were broadly similar between more frequent and less frequent users, with fewer than five percentage point differences between the two groups at most of the response options. The only exceptions were for ‘buses take too long’ (19% of frequent users and 27% of less frequent users), ‘prefer/need to use other modes of travel’ (8% of frequent users and 33% of less frequent users), and there being ‘no specific reason’ (16% of frequent users and 8% of infrequent users). These broadly similar responses by more and less frequent users means it is difficult to determine the extent to which these issues actually impact usage, and suggests that frequency of use did not necessarily impact on the reasons for not using the bus more often.

Differences were more prevalent by card type, however, with several issues being more common among disabled cardholders compared to those with an over 60 card. These included perceptions that buses were unreliable, the physical accessibility and suitability of the bus for respondents’ conditions, that buses were too busy, concerns about anti-social behaviour, not feeling safe, and being concerned about catching illnesses. These differences were largely consistent between frequent and infrequent users by card type. The only exception was the physical accessibility and suitability of buses, where the issues were more common among less frequent disabled users compared to more frequent disabled users. This suggests that these elements may present tangible, physical barriers which impact on usage, with a lack of access reducing the frequency of travel and buses being unsuitable for conditions making travel less practical and desirable.

In addition to service provision issues, a **lack of bus services** and/or stops or stations nearby was an issue for 19% of less frequent users (this option was not available to more frequent users). This challenge was also confirmed across the qualitative feedback (from survey and focus group respondents). Service provision was a particular issue for those living in rural areas where respondents often highlighted the lack of availability, frequency, reach and accessibility of bus services. This discrepancy created a strong sense of frustration, inequity and unfairness that people in certain areas could not access the benefits of the Scheme in the same way as their peers in other areas.

A few respondents, particularly community transport operators, also discussed the exclusion of Section 19 (S19) door-to-door community transport services (operated by non-profit making bodies) from the Scheme. They felt this resulted in some of the most vulnerable older and disabled people being excluded from the Scheme, as they could not access scheduled bus services and could not use their NEC on the S19 services.

Process and administration

Bus operators were generally positive about the operation of the Scheme, although a few expressed views related to the reimbursement rates.

Most cardholders (86%) reported that they found it easy to get information about the free bus pass, although disabled cardholders were slightly more likely to find it difficult compared to those with an over 60 card. There was also evidence of misunderstandings and conflicting advice being provided to cardholders about eligibility, applications/renewals/replacements, and other uses/benefits of the NEC.

Most respondents found the application process (85%) and the renewals and replacement process (74%) either very or fairly easy. Disabled cardholders were less likely to find both the application and renewals and replacement process easy compared to those with an over 60 card. Indeed, the difficulties that were highlighted with applications and renewals were largely related to the disabled cards. It was noted that significant evidence was required to apply for/renew these cards, making the process time consuming and difficult. In addition, the expiry date on these cards was often difficult for cardholders to read, meaning they were often unaware that their card was about to expire. There was a general consensus among respondents from all groups (including survey and focus group respondents, the third sector organisations and bus operators) that it should not be necessary for those with lifelong and unchanging disabilities or conditions to have to regularly renew their card.

Overall Satisfaction

Overall, the vast majority (94%) of survey respondents said that they were either very or fairly satisfied with the Scheme. Only 2% were dissatisfied. Results were largely consistent by card type.

The main issues which reduced levels of satisfaction or drove dissatisfaction were the lack of bus services or routes available to respondents, poor local services, or problems with the accessibility of services, which meant that cardholders could not use the Scheme or access the benefits it provided.

Suggested improvements to the Scheme from cardholders and operators

Across the evaluation feedback, common suggestions for improvements to the Scheme included:

- Improvements to the application and renewal processes to ensure accessibility and consistency.
- Greater consistency and clarity on additional uses/benefits of the NEC to provide equity for all cardholders.
- Provision of a digital NEC to sit alongside, but not replace, physical cards. It is currently only possible for people to have access to the Scheme in one format.
- Expanded scope of concessionary travel to trains, trams and the subway for all cardholders, as well as night buses and S19 door-to-door services.
- Additional driver training in relation to the different types of cards to reduce negative experiences by cardholders.
- Consideration of a higher reimbursement rate for operators.

Operator feedback in relation to reimbursement also suggests that improved communication and ongoing engagement between Transport Scotland and operators may be needed to ensure the reimbursement rates and reimbursement methodology are more clearly understood and that both remain aligned with legislative requirements and appropriate for the operating context.

In addition, a small number of respondents thought that eligibility should be tightened, with the over 60 card linked to retirement or means testing.

Conclusion

Overall, the evaluation suggests that the Scheme is highly successful and valued. The results show that the Scheme is largely meeting each of the objectives, driving modal shift and contributing to a reduction in carbon emissions, improving physical health, mental health and wellbeing for cardholders, and tackling inequalities. In general, it operates smoothly for both bus operators and cardholders, although a few areas were flagged to deliver direct improvements to the Scheme. The findings show that the Scheme is well used, with most survey respondents using it with some regularity. The Scheme is also used for a wide range of purposes and provides a variety of benefits.

There were differences in some results, largely by card type and the extent to which households were experiencing financial difficulties or not. In particular, disabled cardholders found it more difficult to get information about the Scheme, and the application and renewal process was more difficult for this group. Disabled cardholders were also more likely to experience difficulties with physical access to buses, and were more concerned about safety and anti-social behaviour. However, they also appeared to experience the benefits to a greater extent, for example saving larger amounts of money, improvements in access to services, and improvements across the health and wellbeing measures.

The Scheme was described as excellent by those who use it, and as a ‘life-line’ for many. However, for those with no access to services, or where services did not run when or as often as needed, where direct routes were lacking or services were unreliable or slow, or presented accessibility challenges, the value of the Scheme was severely diminished. Better service provision and more accessible services would be needed in some areas, or expansion of the Scheme to support wider travel options (such as discounts on taxis or the inclusion of S19 door-to-door community transport services), in order to ensure greater equity in people’s ability to access, use and benefit from the Scheme.

Introduction

The National Concessionary Travel Scheme for Older and Disabled People

The National Concessionary Travel Scheme for Older and Disabled People (the Scheme) was introduced on 1 April 2006. Anyone who lives in Scotland, and is aged 60 and over, or meets certain disability criteria is eligible to apply. Applications can be made online at getyournec.scot, via local councils, or through the Post Office in certain Local Authorities areas for the over 60 card.

The Scheme is accessed via the National Entitlement Card (NEC), which provides cardholders with free travel on registered local and long-distance bus services throughout Scotland, at any time of the day for any number of journeys. Bus operators are reimbursed by Transport Scotland for carrying cardholders. More than 140 bus operators in Scotland participate in the Scheme.

There are a range of NECs, which can be issued as part of the Scheme. These include:

- over 60
- disabled
- disabled plus companion (+1)
- sight impaired
- sight impaired plus companion (+1)

The key objectives of the Scheme are to:

- allow older and disabled people improved access to services, facilities and social networks, promoting social inclusion
- improve health by promoting a more active lifestyle
- remove the restrictions of the previous local off-peak concessionary fare scheme which was limited in offering access to facilities
- promote a modal shift from private cars to public transport
- maintain a viable position for bus operators with a standard reimbursement rate
- provide opportunities for improvements to public transport, such as assisting development of multi-operator ticketing and the use of electronic ticket machine technology

- facilitate a more effective administration of the system by adopting a standard reimbursement rate and shifting operational responsibility from local authorities to Transport Scotland
- provide a stimulus to the introduction of smart ticketing

The evaluation

In August 2025, Transport Scotland commissioned an independent evaluation of the Scheme.

The aims of the evaluation were to:

- understand how the Scheme works, who is using it, how it is being used and the benefits it brings
- identify any differences in usage and experiences between groups of cardholders
- undertake a value for money assessment in order to understand the value of benefits delivered through the Scheme

The evaluation was focused largely on the use and impacts of the Scheme, although a small component considered how the Scheme operates in practice.

In order to direct the evaluation and the development of the data collection tools, Transport Scotland's evaluation aims and logic model for the Scheme were also considered. The logic model identified the expected short, medium and long term outcomes for the Scheme. The key outcomes are clustered by theme and summarised below:

Reduction in carbon emissions, including:

- increase in bus usage (new and existing journeys)
- modal shift from car to bus and reduction in car kms

Reducing inequalities, including:

- reduction in travel costs/reduced household spend on transport
- access education/work/volunteering
- access to services, including health
- access to social and leisure activities
- increase in domestic tourism (day trips and holidays)
- people feeling safe using the bus

Improved health, mental health and wellbeing, including:

- increased activity levels (walking more/more active travel)
- improved confidence, freedom and independence

- reduction in social isolation

Methodology

The evaluation was supported by an Evaluation Advisory Group (EAG). This included representatives from Transport Scotland, the Wellside Research team, Mobility and Access Committee for Scotland (MACS), Bus Users UK, and the Confederation of Passenger Transport (CPT).

A mixed-methods approach was adopted for the work. This included:

- a survey of people who have one of the Scheme NECs
- focus groups with people who have one of the Scheme NECs
- interviews with bus operators and third sector support organisations
- secondary data analysis
- a cost/benefit and value for money assessment

Each methodological element is outlined below, while respondent profile information is provided at Appendix A.

The research materials used in the cardholder survey, cardholder focus groups and operator interviews is provided separately and can be accessed on the Transport Scotland's website.

The design of the evaluation was impacted by two factors: the length of time the Scheme has been in operation (20 years), and the lack of any baseline study or data prior to the introduction of the Scheme in April 2006. Various options to establish a comparator were considered which included comparing the travel behaviour of those not eligible for the Scheme with cardholders*;* comparing the travel behaviour of those eligible for the Scheme but are non-cardholders with cardholders*;* or establishing a comparator area where the Scheme is not in operation. The first option would have been unreliable as it would have compared very different population groups which are likely to have different travel needs and behaviours. The second option was discounted as uptake is high for the over 60 card, and the final option was not viable due to the Scheme being available nationally and no suitable comparator outside of Scotland was identified. As a result the evaluation was designed around existing cardholders, and asked participants questions on the impact of the Scheme and about their travel behaviour if the Scheme did not exist.

Survey of cardholders

A survey was designed to gather experiences of, and feedback about, the Scheme. This was primarily designed and implemented as an online survey in order to provide national coverage and to allow as many people to participate as possible. The survey was live for six weeks, between 13th October and 23rd November 2025.

As part of the NEC application process, applicants are asked to provide an email address. With permission from the Scheme administrator, the National Entitlement Card Programme Office (NECPO), this data was used by Transport Scotland to select a stratified random sample of over 35,000 cardholders who provided an email address and to issue survey invitation emails. Equal numbers were sampled among holders of the over 60 card and disabled card (which included all four related card types). Within each card type, the sample was designed to be representative of age group and the local authority where the card was registered. Additional sampling was also undertaken at the outset to boost participation among small groups (either by age group or local authority) to try to ensure sufficiently robust sample sizes were achieved. A small number of emails were undeliverable due to incorrect email addresses or addresses that were no longer active.

In addition, the survey was advertised more widely to try and capture the views of cardholders that had not provided an email address as part of the application process. Transport Scotland advertised the survey via their social media channels. A wide range of national and local organisations who provide services and support to older, disabled and sight impaired people also advertised the survey via their networks, newsletters, social media channels, and direct contact with eligible cardholders.

Large print paper-based self-completion questionnaires were also provided to one organisation who distributed these among their service users. An optional prize draw was offered to all those who completed the survey.

In total, **2,502** cardholders responded to the survey. Of these, nearly two thirds (64%, n=1,590) held an over 60 card, while 36% (n=912) held one of the disabled cards. Respondents were asked a number of demographic questions to understand the sample profile, this included socioeconomic background and employment status. For example, the majority of respondents with an over 60 card said they were retired (71%, n=1,117) while 23% (n=364) were in work (full-time, part-time or self-employed). Regarding respondents who held one of the disabled cards, 30% (n=265) said they were in work, this was the most common response. A full breakdown of respondent employment status by card type, and other demographic detail is provided at Appendix A.

Representatives from two support organisations (one focused on disabled people and the other representing both older and disabled people) participated in interviews to provide the views and experiences of their service users and members more generally, as the online survey was not suitable for their accessibility needs.

All quantitative survey data were analysed using descriptive analysis. Frequencies were generated for all closed questions (i.e. where the respondent selected an option from a list) to provide the number and percentage of respondents who had selected each response option. Crosstabulations were also used at key questions to disaggregate the results by different groups (i.e. by cardholder type, or by demographic information) to identify consistencies or differences in experiences. All qualitative survey data (i.e. where respondents provided open text responses) were subject to thematic analysis to identify the common topics and issues raised. It should be noted that the survey findings were not subject to statistical testing and differences between groups of respondents may reflect sample variability.

It is important to note, however, that the survey results are not representative of the total population of cardholders, rather **views reflect the feedback of those who took part**. As the survey was mostly available online, and the invitations to participate were largely (although not exclusively) sent to those who had provided a valid email address, this may have introduced some bias in the results. Those who did not provide email addresses when they applied for the NEC, or who do not/cannot access online sources would have been less likely to participate.

Focus groups

Eight focus group sessions were held, as well as two interviews (offered where participants could not access a focus group). A total of **65 individuals** took part. Participants represented a mix of perspectives and experiences, including older, disabled and sight impaired cardholders; those living in urban and rural areas; as well as frequent and infrequent users of the Scheme.

People were identified and invited to participate in a range of ways. Some were identified and contacted from the online survey which included an opt-in question to express interest in the focus groups. In other instances, support organisations and other groups were approached and agreed to either advertise focus groups to their members/network, or to directly recruit and host groups. Again, this approach means there may be some bias in the results, as participants were likely to be either more IT literate, or more likely to be in contact with support services.

Most focus groups lasted 1.5 hours. However, a few deviated from this in order to fit with the requirements of the organisations who helped to arrange them. In these instances, they ranged between 45 minutes and two hours. Both online and in-person groups were held. Focus group attendees were provided with a shopping gift voucher as a thank you for their time.

Subject to permission from participants, all focus groups and interviews were recorded and transcribed. Data was analysed using thematic analysis, whereby all data was read, and the common themes, topics and issues were identified and extracted. Themes were broken down further to be more nuanced as required. Anonymous quotes were also extracted and are included throughout the report to illustrate key points.

Bus operator interviews

Interviews were conducted with bus operators who accept the NEC on their services. This represented a small component of the overall evaluation, with feedback gathered from **six operators**.

A sample frame was designed to direct recruitment. This ensured representation from commercial operators and community transport providers, a mix of locations/areas, and different sized operators. Support was sought from the Confederation of Passenger Transport (CPT) and the Community Transport Association (CTA) to identify, contact and recruit appropriate organisations. Transport Scotland also identified suitable operators to be invited to participate.

These interviews focused on the operational processes of the Scheme, any changes that may have been made to services as a result of the Scheme, and any impacts on operators themselves. Interviews were conducted online or by telephone, and lasted between 30 minutes and an hour.

Secondary data analysis

Transport Scotland provided cardholder and journey data. Cardholder data was supplied by NECPO and shared with their permission, while journey data was held by Transport Scotland. All data was anonymised so that individual cardholders could not be identified. The data combined the four disabled card types into a single category. The data included the number of people with an eligible NEC, and journey data based on smart journeys - these are journeys recorded by smart cards, i.e. when the NEC is scanned by the machine on board the bus. The data did not include manually recorded journeys, for example, where the card or ticket machine fails or where an operator does not have equipment (e.g. some community transport operators).

High level data was provided covering the last eight years. This included the total number of cardholders in the Scheme and the total number of journeys that had been made under the Scheme between the financial years 2016-2017 to 2024-2025. In addition, disaggregate data was provided for a five year period. Data on the number of cardholders represented snapshots, based on 31 March each year between 2021 and 2025, as well as for 30 September 2025 (the most recent data available to inform the analysis). This included the type of card, (i.e. the over 60 card and collated data for all four disabled card types), age group, gender, and local authority where the card was registered. In addition, the data zone where the card was registered was also provided, based on a snapshot from 1 August 2025, which allowed Scottish Index of Multiple Deprivation (SIMD) decile and urban/rural classification to be assigned. Journey data detailed the total number of journeys made in each financial year between 2020-2021 and 2024-2025. Again, this included card type, age group, gender, and local authority where the card was registered, as well as time of day and month of use.

While all data was considered, data presented in the report focuses on the high level figures between 2017-2025, or the latest available disaggregate data as data from 2020 onwards was impacted by the Covid pandemic.

Cost/benefit and value for money assessment

The Value for Money (VfM) assessment considered the quantifiable elements of the Scheme. The assessment was undertaken based on 2024-25, as this was the latest full financial year for which data was available.

The VfM assessment sought to quantify, at a high level, the benefits the Scheme delivers to users and society as a result of the behavioural change observed through the survey, against the cost to government of funding the Scheme. The analysis was based on approaches and parameters set out in the Department for Transport's (DfT) Transport Appraisal Guidance (TAG), which aligns with Transport Scotland's Scottish Transport Appraisal Guidance (STAG).

The VfM assessment has been provided in a separate report. This can be accessed on Transport Scotland's website.

Challenges and Limitations

A number of points should be borne in mind when interpreting the findings set out in this report. Differences were identified in relation to the cardholder data compared with the estimated eligible population data. Two local authorities and many data zones in other local authorities were shown to have over 100% uptake, meaning the data suggested that more cards were registered than there were estimated eligible people living within the area. The cause of the anomalies is not clear, and could be a result of a range of different reasons, including limitations with the population data (such as people moving house after the population was recorded, or estimation techniques used to establish the full populations), and/or limitations with the cardholder data (such as people moving house after receiving their NEC, as data is based on where the card was registered, or people who had died not being removed from the database).

It should also be noted that local authority data collected in the survey was based on where cardholders lived. However, official cardholder and journey data is recorded based on where the card was registered. As such, references to local authority vary depending on the source of the data. This has been explained in the text as required.

There were also barriers to participation in the primary data collection. The survey was administered largely via online methods meaning participation was difficult for those with unreliable or no online access and those who may have poor IT literacy. While alternative methods and focus groups were offered/conducted in some instances to address these gaps, these were not always suitable or possible within the timescale. In addition, no British Sign Language (BSL) version of the survey was provided, which most likely presented a barrier for deaf people and BSL users. An interview was conducted with staff from a third sector organisation who provided generalised feedback based on their experiences of supporting deaf people/the deaf community. However, feedback may not represent the direct experiences of the deaf community, with this presenting a gap in the research.

Differences in the survey sample structure must also be borne in mind when interpreting the results. Importantly, disabled cardholders were over represented in the achieved sample compared to their representation within the total cardholder population (see Table 1). However, it was considered important to ensure that the experiences and issues of disabled cardholders were taken into account. It was agreed with Transport Scotland that the data would not be weighted to reflect the population structure as this would reduce the voices of disabled cardholders.

Table 1 Survey sample compared to all cardholders

Type of Card	Survey (n)	Survey (%)	All cardholders[1] (n)	All cardholders (%)
Over 60	1,590	64%	1,412,054	89%
Disabled	912	36%	182,138	11%
Total	**2,502**	**100%**	**1,594,192**	**100%**

[1] Based on the total number of cardholders as at 30 September 2025.

In addition, the age distribution of over 60 cardholders differed between the survey sample and the total population (see Table 2). Again, it was agreed with Transport

Scotland that weighting would not be used to correct this. It was felt that this would be inappropriate due to the issues noted above around potential inaccuracies in the population database, and the need for high weighting factors to be applied to the 80+ age group.

Table 2 Age group of over 60 cardholders - survey sample versus all cardholders

Age group of over 60 cardholders	Survey (n)	Survey (%)	All cardholders (n)	All cardholders (%)
60-64	558	35%	282,113	20%
65-69	449	28%	301,148	21%
70-74	295	19%	265,673	19%
75-79	158	10%	246,352	17%
80+	88	6%	316,768	22%
Not disclosed	42	3%	Not applicable	Not applicable
Total	**1,590**	**100%**	**1,412,054**	**100%**

It should be stressed that the findings reported throughout this report represent the views of those who took part in the research, either via the survey, the focus groups or in interviews. The findings should **not** be considered to be more widely applicable and are **not** representative of all cardholders or bus operators.

Reporting conventions

Throughout this report, references to older cardholders and disabled cardholders relate to the type of card held rather than descriptions of personal characteristics. There was overlap between card type and demographic characteristics, with some of those who held an over 60 card also having a disability, and some of those who held a disabled card also being over the age of 60. For clarity, however, the report focuses on, and intends to refer to the type of card held.

Unless otherwise specified, references throughout the report to disabled cardholders/cards incorporates all of the following NEC types: disabled; disabled plus companion (+1); sight impaired; sight impaired plus companion (+1).

To ensure the research materials (e.g. survey questionnaire) were accessible to participants, the term “free bus pass/bus pass” was used, as this is more readily and easily understood, and reflects what the NEC and the Scheme is referred to colloquially. When reporting directly on the survey findings, quoting the survey question and response options, and providing quotes from the focus groups and interviews, “free bus pass/bus pass” is used throughout the report to ensure consistency with what participants were asked about and their responses. Elsewhere in the report, NEC, card or Scheme is used depending on the context to align with Transport Scotland and other stakeholder terminology.

The following descriptions have been used throughout when presenting qualitative findings:

- all - everyone who answered the question made this point
- most/many/the majority - more than half of participants
- some - more than several but less than most/many/the majority
- several - less than some but more than a few participants
- a few - two to around ten survey respondents, or two or three focus group participants
- one/an individual - just one person

While many tables are included below, and in the Appendices, a separate Annex document is also available which includes additional tabular results from the cardholder survey. Where tables from this Annex support findings outlined below, this has been referenced in the text.

Finally, percentages reported throughout represent the valid percentage, i.e. the proportion of those who answered the question and gave a specific answer. Percentages have also been rounded to ensure totals add to 100% by rounding up or down the figure closest to .5% as appropriate.

Number of cardholders and usage

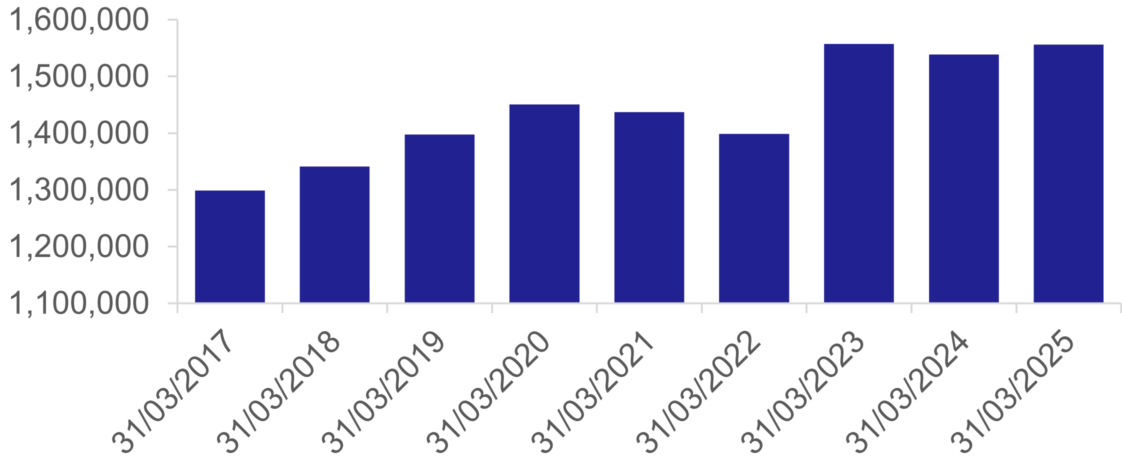
Summary

- Number of cardholders has increased between 2017-2025
- Number of journeys has decreased between 2017-2025 (mostly due to the impact of the Covid pandemic)
- Disabled cardholders, as well as those who were finding things difficult financially used the Scheme slightly more often
- Card used mostly for social and leisure purposes, shopping and personal business, and to access healthcare
- The most common reasons for not using the bus more often relate to service provision, including that buses do not run when or as often as needed

Number of cardholders

The Scheme launched in April 2006, however data suitable for use in this evaluation was only available from 2017 onwards. Figure 1 shows the total number of Scheme cardholders on the 31 March each year since 2017. This shows steady growth in cardholder numbers between 2017 and 2020, before a reduction in 2021 and 2022 during the Covid pandemic. The number of cardholders recovered and grew again by 2023. An audit of the database was conducted in 2024 which resulted in many deceased people being removed. This led to a reduction in the total numbers, before a small increase was seen by March 2025, with the figure in line with that recorded at March 2023. Overall, between March 2017 and March 2025, the total number of cardholders had grown by 257,225 people, from 1,299,024 to 1,556,249.

Figure 1 Total number of cardholders since 2017 (Source: Transport Scotland and NECPO)



Appendix B includes charts outlining the total number of cardholders by age, gender and local authority where the card was registered, based on the most recent data available (as at 30 September 2025). Most (70%) disabled cardholders were between the ages of 20 and 59, while a quarter (25%) were aged 60+, and 5% were aged 19 or under. Among those with an over 60 card, 41% were aged 60-69, 36% were aged 70-79, and 23% were aged 80+. Disabled cardholders were relatively evenly split between women (45%) and men (41%), with gender unknown or other in 14% of cases (gender is not a mandatory response on the application). For the over 60 card, there were more women (52%) compared to men (42%) (gender unknown or other 6%).

The local authorities with the highest and lowest numbers of registered cardholders largely mirrored those with the largest and smallest overall population sizes. As the total estimated eligible population could be established for the over 60 card (based on National Records of Scotland (NRS) data, population estimates of data zones by single year of age: mid-2022), comparison of population data and the number of cardholders by local authority showed that uptake ranged from 86% in the Scottish Borders to 115% in Edinburgh. As noted above, areas with uptake close to or over 100% may be due to limitations in the population data and/or cardholder data.

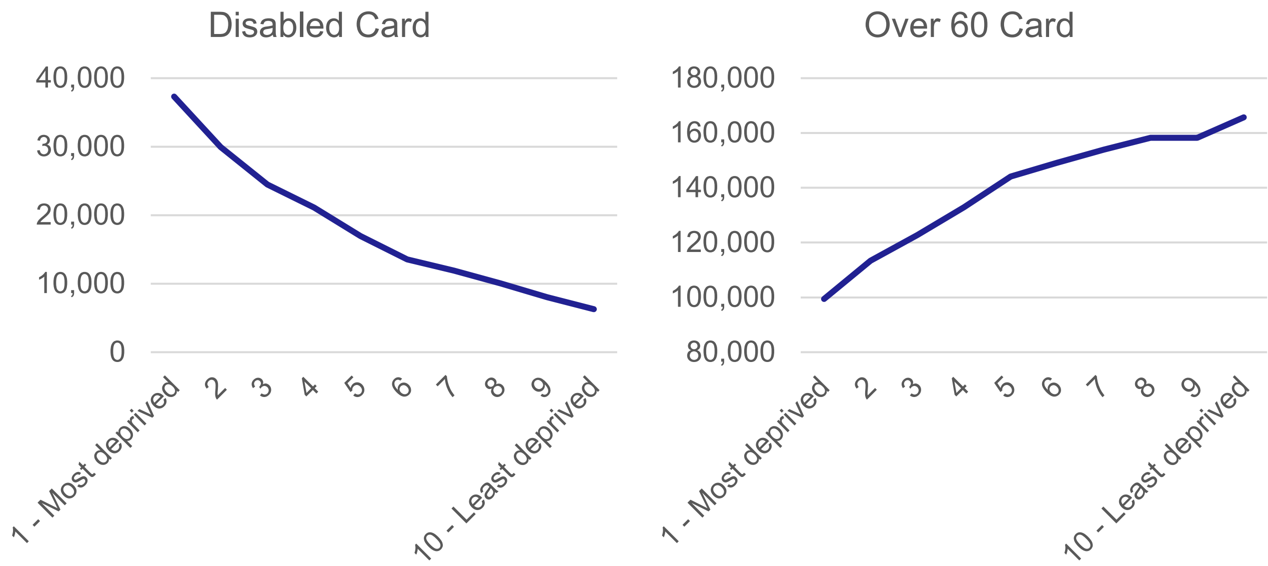
Both Table 3 and Figure 2 below show the number of Scheme cardholders and by Scottish Index of Multiple Deprivation (SIMD) decile (based on data at 1 August 2025). These show that the number of disabled cardholders was higher in more deprived areas. Conversely, the number of people with an over 60 card and the uptake of this type of card was higher in less deprived areas. The least deprived areas (least deprived 10% of datazones) had the highest number of cardholders and highest uptake (105%) of the over 60 card, while the most deprived areas (most deprived 10% of datazones) had the lowest number of cardholders and lowest uptake (89%). The reasons for the conflicting patterns in cardholder numbers was not clear however, and further investigation would be required to determine whether this represents lower engagement with the Scheme (which may benefit from awareness raising efforts among those in more deprived areas), or whether older residents in more deprived areas are more likely to hold a disabled card instead.

Table 3 Number of cardholders by SIMD decile (as at 1 August 2025)

SIMD 2020 decile	Disabled cardholders	Over 60 cardholders	Total number of cardholders	Uptake of over 60 card
1 - Most deprived 10% of data zones	37,315	99,428	136,743	89%
2	29,965	113,402	143,367	90%
3	24,465	122,750	147,215	92%
4	21,100	132,924	154,024	93%
5	16,934	144,159	161,093	94%
6	13,553	149,132	162,685	94%
7	11,933	153,969	165,902	95%
8	10,036	158,207	168,243	97%
9	8,025	158,302	166,327	99%
10 - Least deprived 10% of data zones	6,280	165,712	171,992	105%
Total	**179,606**	**1,397,985**	**1,577,591**	**95%**

Note: Uptake is only possible to calculate for the over 60 card as population data is available (based on NRS population estimates of data zones by single year of age: mid-2022), there is no reliable equivalent for the population of those eligible for a disabled card. Source: Transport Scotland, NECPO and NRS.

Figure 2 Number of cardholders by SIMD decile (as at 1 August 2025, Source: Transport Scotland and NECPO)



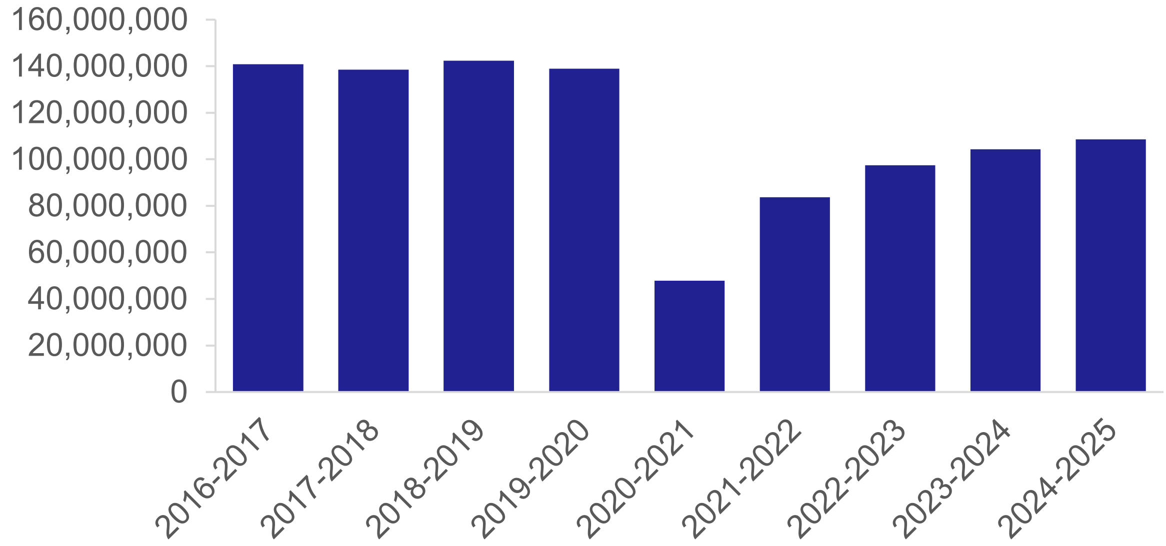
Appendix B also details the number of cardholders by urban/rural classification (as at 1 August 2025). This shows that most disabled cardholders (79%), as well as two thirds (67%) of those with an over 60 card, live in either large or other urban areas. The uptake levels of the over 60 card varies by area, but without any clear pattern, ranging from 100% uptake in large urban areas compared to 91% in remote small towns.

Number of journeys made

Figure 3 shows the total number of smart journeys each financial year since 2016-2017. As noted above, these are the journeys recorded when the NEC is scanned by the machine on board the bus.

The chart shows that the number of journeys was reasonably consistent each year between 2016-2017 and 2019-2020. This was impacted by the Covid pandemic, where the number of journeys dropped significantly in 2020-2021. While journey numbers steadily increased again, they had still not yet returned to pre-Covid levels by 2024-2025, despite the higher number of cardholders recorded in recent years. This in line with overall trends in bus passenger journey numbers in Scotland following the Covid pandemic. More information can be found in Scottish Transport Statistics. Overall, between 2016-2017 and 2024-2025, the total number of annual journeys made using the NEC had reduced by nearly 32.28 million, from 140.85 million to 108.57 million.

Figure 3 Number of journeys made using the NEC (2016-2017 to 2024-2025, Source: Transport Scotland)



Appendix B outlines the number of journeys made in the financial year 2024-2025 by age, gender, local authority where the card was registered, time of day, and month of the year. The vast majority of journeys were made by those aged 60+. Women made more journeys than men (56% versus 42% respectively) using the over 60 card. Meanwhile, men made slightly more journeys than women (49% versus 45%) using one of the disabled cards, despite there being slightly fewer male cardholders for these types of cards. Cards registered in Edinburgh and Glasgow recorded the highest number of journeys (but these journeys could have been made anywhere across Scotland).

The vast majority of journeys, by both over 60 and disabled cardholders, took place in the inter-peak period (i.e. 10.00am-3.59pm), although there was also notable usage during both the am and pm peak periods (i.e. 7.00-9.59am and 4.00-6.59pm). The number of journeys fluctuated throughout the year, ranging from around 8 million journeys in January 2025, to nearly 10 million journeys in August 2024. Journey data was not provided by SIMD or urban/rural classification.

Aging population

Over the lifetime of 60+ concessionary travel policy, the 60+ population has grown in Scotland and is forecast to continue growing. While the results above show that the number of people with a 60+ card has tended to increase in line with population increases, the total number of journeys made has not necessarily increased in line with this (with recent increases being a result of Covid recovery). Analysis undertaken by Transport Scotland shows that concessionary bus use is determined by several social and economic factors, which can both increase and decrease bus use. These include population changes, bus service provision and quality, alternative transport options, cost of living, employment trends and changes in travel behaviours. Although the 60+ population in Scotland is forecast to continue growing, it does not necessarily mean that use of the Scheme will grow as a direct result of an aging population due to the other factors that also influence bus use.

Use of the Scheme

Survey respondents were asked about their use of the free bus pass over the last 12 months. Over half (59%, n=1,462) noted that, on average, they had used the free bus pass about once a week or more often in the last 12 months. Respondents who used the free bus pass either a few times a year or not at all in the last 12 months (18%, n=455) were considered to be infrequent users and, at certain points throughout the survey, they were asked different questions about their travel behaviour.

Table 4 On average, how often have you used the free bus pass for travelling on buses in the last 12 months? (survey respondents)

Frequency	Over 60 Card	Disabled Card	All respondents
Five days a week or more	9%	19%	13%
Two to four times a week	25%	36%	29%
About once a week	18%	14%	17%
About once a fortnight	11%	8%	10%
About once a month	16%	10%	13%
A few times a year or less	17%	10%	14%
Not used it in the last 12 months	4%	3%	4%
Total (n)	**1,590**	**912**	**2,502**

Disabled cardholders were more likely to use the free bus pass more often, with higher instances of multiple uses per week (55%) compared to those who held an over 60 card (34%). Similarly, those who were finding things difficult financially were more likely to use their free bus pass multiple times per week (56%) compared to those who managed very or quite well financially (34%). Full results are included in the tabular Annex - Tables 1 and 2.

Those who used the free bus at least once in the last 12 months were asked to outline the main reason they chose to travel by bus. The most common reasons were that it was free/costs less than travelling by another means (33%), that they had no other travel options (25%), and because it was more convenient than using the car (16%) - see Table 5.

Table 5 When using the bus for travelling, in general what is your main reason for choosing to take the bus? (survey respondents)

Reason	Over 60 Card	Disabled Card	All respondents
It's free/it costs less than travelling by another means	37%	26%	33%
I don't have the option of travelling by another means	13%	47%	25%
It's more convenient than the car	22%	6%	16%
It's more convenient that other transport options	9%	6%	8%
It's better for the environment than the car	8%	3%	6%
It's better for the environment than other public transport options	1%	<1%	1%
I prefer the bus to other means of travel	2%	4%	3%
Other	8%	8%	8%
Total (n)	**1,519**	**869**	**2,388**

Note: 114 respondents did not answer this question.

When comparing the results by the type of card held, cost and convenience were the main reasons for those with an over 60 card (37% and 22% respectively). Meanwhile, a lack of alternative options was the main reason for disabled cardholders (47%).

‘Other’ reasons for choosing to take the bus included that it allowed respondents to have an alcoholic drink while out; they could not use their car or the driver was not available; to avoid parking issues and costs as well as fuel costs; difficulty or dislike of driving in certain areas or at particular times of day; and to avoid the cost of taxis. Some also noted that the card was used to travel on trains, the tram and on ferries, either for free or at discounted cost.

There were differences in the reasons for using the Scheme by how well respondents were managing financially (Annex - Table 4). Those who had financial difficulties were more likely to indicate that they did not have the option of travelling by another means (45%). Meanwhile, cost was the main reason for those who were managing well (35%) and those who managed alright (34%).

There was variation across focus group participants in how frequently they used the Scheme. Where respondents lived and the quality of their local bus service were a key driver of levels of use. Those living in or on the outskirts of cities and large towns typically used the bus most often. Conversely, those living in areas where bus services were scarce or had been reduced tended to be infrequent users.

Use of the companion NEC

The 604 survey respondents who held a disabled plus companion card were asked to provide feedback about the companion element of the card. Most (65%) indicated that they had a companion travelling with them either every or most of the time they travelled. Only 10% suggested they rarely or never travelled with a companion. Full results at provided in the Annex - Table 5.

Both survey and focus group participants stressed that the companion element was essential, noting that they would not be able to travel without someone to help/support them. Even those who did not travel with a companion every time noted that it was essential on certain occasions, typically where health conditions fluctuated or where support was needed only for certain types of trips.

Several appreciated that the companion card was not restricted to a single named companion. This flexibility allowed a mix of people to act as the companion and meant the cardholder could travel with different people, at different times, and for different purposes.

A few survey respondents and focus group participants also noted that they often travelled with other cardholders as companions, so they did not always need to use the companion element. It was suggested that finding a companion to accompany them on all occasions was difficult as people were not always available.

Journey purpose

Frequent users

Survey respondents who used their free bus pass about once a month or more often (frequent users) were asked to detail all the types of journeys they made by bus, and to identify the one type of journey they made most often (main journey) by bus over the last 12 months. Table 6 details the responses. This shows that social and leisure purposes, shopping and personal business, and to access health and medical appointments/services were the most common in both cases.

Table 6 Journey purpose (survey respondents that use their free bus pass about once a month or more)

Journey purpose	All journeys	Main journey
Social and leisure purposes	75%	35%
Shopping and personal business	67%	24%
Health and medical appointments/services	56%	14%
Visiting family and friends	45%	7%
Day trips and holidays (including overnight trips)	33%	3%
Just to get out	30%	3%
Commuting to/from work	17%	8%
Volunteering	13%	2%
Education / training	12%	3%
Travelling within my job/as part of my job	6%	1%
Other	1%	<1%
Total (base)	**2,047**	**2,045**

Note: multiple responses were possible regarding all journeys made so percentages in this column do not add to 100%. In addition, two respondents did not detail their main journey purpose.

Journey purposes were disaggregated by card type and the age of respondents that held an over 60 card (see Annex, Tables 6-8). In relation to the card type, holders of the over 60 card were most likely to use the free bus pass for social and leisure purposes (82%), with this also being the most popular main journey type (47%). Among disabled cardholders, however, social and leisure purposes was the third most popular use (behind healthcare and shopping and personal business), with 64% using it for this, and 18% indicating that this was the type of journey they made most often. Those with a disabled card were most likely to use the free bus pass for health and medical appointments/services (73%). They were also more likely to use it just to get out (39%), for commuting (23%) or other work related travel (10%), and for education/training (21%), compared to those with an over 60 card. Levels of use for shopping and personal business were similar between both card types (at 67% each).

Meanwhile, social and leisure travel remained the most common use of the over 60 card across all age groups. However, there were differences by age at some other journey purposes. Shopping and personal business was less prevalent among those aged 60-64 (62%), becoming more common through the age groups, up to 74% for those aged 80+. Similarly, travel for health and medical reasons was less common among those aged 60-64 (37%), rising to 57% for those aged 75-79 and 80+.

Conversely, those aged 60-64 were more likely to use the free bus pass to commute to work (24%), with this declining as age increased.

In terms of the main journey purpose, those using the bus tended to travel for this reason either two to four times a week (33%), or about once a week (23%) (see Table 7). Meanwhile, the journey duration tended to be 11 to 30 minutes (38%) or 31 to 45 minutes (24%) (see Table 8).

Table 7 Frequency of main journey purpose (more frequent bus users only)

Frequency	Number	Percentage
Five days a week or more	176	9%
Two to four times a week	668	33%
About once a week	463	23%
About once a fortnight	259	13%
About once a month	364	18%
A few times a year or less	94	4%
Total	**2,024**	**100%**

Note: 23 respondents either did not know or did not answer this question.

Table 8 Length of main journey (more frequent bus users only)

Length	Number	Percentage
Up to 10 minutes	89	4%
11 to 30 minutes	770	38%
31 to 45 minutes	486	24%
46 minutes to 1 hour	356	18%
Over 1 hour and up to 1.5 hours	188	9%
Over 1.5 hours	136	7%
Total	**2,025**	**100%**

Note: 22 respondents either did not know or did not answer this question.

Infrequent users

Survey respondents who had used their free bus pass only a few times in the last 12 months, or who had not used it at all over this time period (infrequent users), were asked to outline their journeys more generally, regardless of the mode of transport used. Again, respondents were asked to outline all the types of journeys they made in the last 12 months, and to identify the journey type they made most often (main journey). Table 9 details the responses.

Table 9 Journey purpose for infrequent users (survey respondents)

Journey purpose	All journeys	Main journey
Social and leisure purposes	77%	27%
Shopping and personal business	66%	24%
Health and medical appointments/services	60%	15%
Visiting family and friends	57%	10%
Day trips and holidays (including overnight trips)	51%	5%
Just to get out	28%	2%
Commuting to/from work	16%	9%
Volunteering	15%	1%
Travelling within my job/as part of my job	10%	3%
Education/training	7%	2%
Other	3%	2%
Total (base)	**455**	**455**

Note: multiple responses were possible regarding all journeys made so percentages in this column do not add to 100%.

Consistent with more frequent bus users, in both cases the top reasons for travelling were social and leisure purposes, shopping and personal business, and to access health and medical appointments/services. A higher proportion of infrequent bus users reported that they travelled for day trips and holidays compared to more frequent bus users; 51% of infrequent users reported travelling for this reason compared to 33% of more frequent bus users (although there was little difference in the proportions who said this was their main journey type).

Those who travelled by bus infrequently were also asked to indicate how they would typically travel for their main journey purpose. Most (79%) said they would travel by car (either as a driver or passenger). Full results are provided in the Annex - Table 9.

Those who did not use their free bus pass for their main journey purpose were also asked to outline the main reason for this. Responses were largely mixed, although the most commonly raised issues were the lack of a direct bus route (20%), and the buses not running often enough or at the times needed (13%). In addition, 15% said they either needed to or preferred travelling by other modes. The full set of responses can be found in the Annex - Table 10.

Again, looking at the main journey purpose (by any transport mode), most respondents said they either made this journey two to four times a week (40%) or five times a week or more (19%) (see Table 10). Consistent with more frequent bus users, infrequent users (those largely travelling by other modes) were likely to indicate that their main journey lasted 11 to 30 minutes (43%) or 31 to 45 minutes (17%) (see Table 11).

Table 10 Frequency of main journey purpose for infrequent bus users/those using other modes

Frequency	Number	Percentage
Five days a week or more	83	19%
Two to four times a week	178	40%
About once a week	41	9%
About once a fortnight	20	4%
About once a month	29	6%
A few times a year or less	97	22%
Total	**448**	**100%**

Note: 7 respondents either did not know or did not answer this question.

Table 11 Length of main journey for infrequent bus users/those using other modes

Length	Number	Percentage
Up to 10 minutes	34	8%
11 to 30 minutes	191	43%
31 to 45 minutes	73	17%
46 minutes to 1 hour	62	14%
Over 1 hour and up to 1.5 hours	33	7%
Over 1.5 hours	49	11%
Total	**442**	**100%**

Note: 13 respondents either did not know or did not answer this question.

The above results suggest that there were few notable differences in the main journey purpose or the duration of the main journey between more frequent bus users (i.e. this using their NEC to travel) and infrequent bus users (i.e. those largely using other modes to travel). However, those travelling by other modes may travel slightly more often for their main journey purpose compared to those using their NEC.

Reasons for not using buses or the Scheme more often

Bus service provision and accessibility

Survey respondents were asked about their reasons for not using buses or the Scheme more often, with multiple responses possible. Different questions were asked depending on whether respondents used their free bus pass about once a fortnight or more (i.e. frequent users, n=1,709) or less than once a fortnight (i.e. less frequent users, n=793). While a long list of options were offered, responses were also collated into themes for analysis purposes (see Annex - Tables 11-13).

The reasons for not using the bus more often were largely consistent between more and less frequent users, with the most common issues being related to **service provision** (56% of frequent users and 61% of less frequent users identified one or more related issues). This included buses not running when or as often as needed, a lack of direct routes, that buses were unreliable, and that they took too long.

In addition to service provision issues, a **lack of bus services** and/or stops or stations nearby was an issue for 19% of less frequent users (this option was not available to more frequent users).

Issues relating to the **on-board environment** (such as being busy, concerns about anti-social behaviour, not feeling safe, and concerns about illnesses) were also noted by 27% of more frequent users and 21% of less frequent users.

Accessibility issues were highlighted by 17% of frequent users and 18% of less frequent users. These included, difficulty physically accessing the bus, buses not being suitable for the respondent's condition, a lack of information/accessible information to help journey planning, and information during journeys not being available or accessible. These accessibility issues were noted despite the Public Service Vehicles Accessibility Regulations (PSVAR) requiring that buses and coaches be accessible to disabled passengers. The Public Service Vehicles (Accessible Information) Regulations 2023 (PSVAIR) now mandates the provision of audible and visible information on board local bus and coach services in Great Britain.

When considering the full list of reasons for not using the bus more often, the survey responses were broadly similar between more frequent and less frequent users, with fewer than five percentage point differences at each response. The only exceptions were for 'buses take too long' (19% of frequent users and 27% of less frequent users), 'prefer/need to use other modes of travel' (8% of frequent users and 33% of less frequent users), and there being 'no specific reason' (16% of frequent users and 8% of less frequent users). These broadly similar responses by more and less frequent users means it is difficult to determine the extent to which these issues actually impact usage, and suggests that frequency of use did not necessarily impact on the reasons for not using the bus more often.

Differences were more prevalent by card type, however, with several issues being more common among disabled cardholders compared to those with an over 60 card. These included buses being unreliable, the physical accessibility and suitability of the bus for respondents' conditions, that buses were too busy, concerns about anti-social behaviour, not feeling safe, and being concerned about catching illnesses. These differences were largely consistent between both frequent and infrequent users by card type. The only exception was the physical accessibility and suitability of buses, where the issues were more common among less frequent disabled users compared to more frequent disabled users. This suggests that these elements may present tangible, physical barriers which impact on usage, with a lack of access reducing the frequency of travel and buses being unsuitable for conditions making travel less practical and desirable. Full results can be found in the Annex.

The Scottish Household Survey (SHS) asks the general population (aged 16 and over) what discourages them from using the bus more often. Analysis shows that three reasons (nothing discourages; use my own car; no need) have remained the most commonly cited between 2018-2024. The similar question asked of Scheme cardholders found the reasons given included those cited in the SHS, but the most common reason among frequent and infrequent users was buses don't run when or how often as needed.

Routes and reliability concerns were also highlighted by many focus group participants, with them being less likely to use the bus for work and appointments as a result. In many such cases, people opted to use the car (where available), and this was especially true if they would be reliant on making multiple connections or changes by bus. For some (older and disabled cardholders alike), the deadlines imposed by appointments and the associated fear of missing these due to unreliable bus services meant that they were using taxis. This group perhaps experienced the greatest travel costs, and felt they would benefit most from the Scheme if only the services allowed for it.

There was also a strong sense among survey respondents that a lack of suitable or available bus services limited the impact and benefits of the Scheme. It was felt that the provision of the card and advertising free bus travel anywhere in Scotland could lead to unfulfilled expectations. Similarly, by far the single biggest barrier to greater bus use among focus group participants was the stated lack of suitable or sufficiently frequent and reliable services. This meant that while they were very satisfied with the principles of the scheme, their use and access to the benefits provided were restricted:

> *"It's just that some transport isn't accessible and some transport doesn't even turn up…So, it's all very well and good saying, yes you have a bus pass and it's a great thing to have, but the transport system has to be better to accommodate that." Over 60 cardholder - focus group participant*

Several participants pointed out that the discrepancy in availability, frequency and reach of services across different parts of the country meant there was a clear differential between those living in different places. Indeed, there was a strong sense of frustration, inequity and unfairness that people in certain areas could not access the benefits that the Scheme offered in the same way as their peers in other areas:

> *"People in towns and cities get the most benefits. People in rural areas such as villages…who most need access to buses feel like second class citizens only being able to access poorly timetabled and infrequent bus services." Over 60 cardholder - survey respondent*

Those in rural areas discussed services that had been reduced or removed, making travel by public transport very difficult and impacting on their ability to use the Scheme. The accessibility of buses was also highlighted as an issue in some rural areas, with bus stops being unsuitable for those with any type of mobility issue to board or alight the vehicle, not being located near residential areas, and the need to use coaches rather than local service buses which were difficult for those with ambulatory disabilities/limitations to board/alight (although it was noted that a lift/winch was provided for wheelchair users). Some also felt that older vehicles had been relocated to more remote/rural areas, meaning they lacked accessibility features such as ramps or step lowering mechanisms.

Exclusion of Section 19 services

A key issue raised by community transport operators was the exclusion from the Scheme of those operating on a Section 19 (S19) permit to deliver door-to-door services using smaller vehicles. The NEC can be used on any Section 22 scheduled bus service which must use a vehicle over a certain size, or a door-to-door service operated by a Public Service License (PSV).

Two (out of the three) community transport operators who participated in an interview highlighted that, in many remote, rural and island locations, there was an aging population who increasingly found accessing scheduled bus services difficult (especially where they were only available at some distance from their home). This was often combined with narrow roads which larger buses could not navigate, meaning that scheduled services often could not be routed/re-routed to be accessible to many residents. Where door-to-door services (operating on a S19 permit) are used in such situations, they are not eligible within the Scheme, and therefore, service users need to pay, either via a membership/ subscription or on a per journey fare basis. Those who needed to use such a service, either due to their location and the lack of an alternative bus service, or due to their age or health condition were not able to use their NEC.

Issues for disabled cardholders

Disabled respondents (across both the survey and focus groups) also indicated that a lack of accessible seating and/or wheelchair space on buses meant they did not use buses or the Scheme more often. Several reports were given of fellow passengers (perceived to be younger and able-bodied) often using and not offering to vacate the accessible seats, drivers refusing access to wheelchair users if the designated wheelchair space(s) was already taken (with some buses only providing one wheelchair space), and wheelchair users having to compete with prams/buggies for space on board. Participants felt there needed to be more support from drivers to access the relevant seating/space to ensure passengers did not come into conflict with each other. Several respondents also noted that some buses did not have access for wheelchairs, mobility scooters or rollators, and that there was a lack of consistency in this respect.

Several disabled cardholders (across survey responses and focus groups) suggested that they had felt judged, or been questioned or challenged by bus drivers regarding the legitimacy of their disability or right to access free bus travel (particularly for companion cardholders). This had left them feeling embarrassed or annoyed. One young sight impaired companion cardholder described often rude behaviours from drivers questioning their need for a free bus pass and for a young companion to also travel for free. Another explained that they had been challenged for not having a companion with them when they held a companion card, and feeling that they needed to justify their fluctuating needs and legal entitlement to the driver.

Survey and focus group participants also identified a range of other issues they experienced with bus drivers. This included them failing to stop for visibly disabled passengers; parking too far from the kerb making it difficult to board or alight; not using the lowered step; not providing assistance to board; not providing information to visually impaired passengers; and recording longer trips on ticket machines than cardholders ask for. In addition, companion cardholders also noted that some drivers appeared to be frustrated or impatient at the need to enter information into the ticket machine for the companion element; that they lacked understanding of the companion cards and that it allows two travellers; and that they could be difficult about accepting the companion card.

There were also issues with drivers misidentifying companion cards for other schemes, particularly when it involved young people. Drivers would assume the card was for the Young Persons' Free Bus Travel Scheme, or question adult companions travelling with young children (where the child was the cardholder):

> *"My [young] son has the C+1 bus pass and I am his companion, multiple drivers have stopped me and told me I'm using a child's card and I have to explain to them it's a companion card and I am his companion...It's very embarrassing and frustrating having to explain this to drivers." Disabled companion cardholder - survey respondent*

It is important to note, however, that poor experiences with drivers was not an issue in all cases/areas, with many survey respondents and focus group participants indicating that they had very positive experiences with bus drivers. One focus group participant also reported that they had seen notable improvements in their local area over time, but recognised that the problem was still evident elsewhere:

> *"When you have a visible disability, the bus drivers have been brilliant. I see them with the wheelchair users and they'll get the ramp out…they never huff and puff, like you never see any drama." Over 60 cardholder - focus group participant*

Impact of the Young Persons' Free Bus Travel Scheme

Many cardholders (from both the survey and focus groups) also commented on the Young Persons' Free Bus Travel Scheme (Young Persons' Scheme) and the changes in their experiences of using buses since this was introduced. Some cardholders indicated that they did not use certain buses/routes at particular times of day due to the increased use by Young Persons' Scheme cardholders. The demand for, and busyness of, buses at certain times of day and times of the year were said to be problematic. Respondents also highlighted safety concerns and perceptions about anti-social behaviour, both onboard and at bus stops and stations. While some speculated that these issues were linked to the Young Persons' Scheme, a few focus group participants felt they were more general problems not linked to any specific group.

Other reasons

Other reasons for not using buses or the Scheme more often, noted across a number of focus groups and generally echoed by survey respondents, included:

- The lack of timetable information - this included a preference among many cardholders for paper copies of timetables.
- The lack of buses at night - this impacted employment and volunteering, the ability to attend medical appointments, as well as social and leisure activities.
- A lack of knowledge/familiarity with how buses operate or the route needed - it was suggested more information could be provided when the card is issued.
- Challenges making longer journeys and those requiring interchanges - while this was physically difficult for some, there was also concern about whether there would be any support at interchange stops.
- Complicated booking systems for longer journeys, with some preferring phone and in person booking options.

Despite the strong feelings expressed about the reasons for not using buses or the Scheme more often, it should be noted that the numbers who indicated they experienced little/no benefits from the Scheme were low overall. The free bus pass was considered to have limited or no benefits for 12% (n=274) of survey respondents due to the lack of bus services, and for 5% (n=111) because buses were not suitable for their condition, illness or disability (see Annex - Table 14).

Impacts on travel behaviour

Summary

- People used the bus more often because of the Scheme (and would use it less if they did not have the NEC)
- The Scheme had encouraged modal shift away from car and taxi use, with car use likely to increase if the Scheme was removed
- Little change reported in levels of walking and train travel
- The Scheme encouraged more frequent travel and travel to new and different destinations

Behaviour if there was no Scheme

Survey respondents were asked to consider how they would travel if they did not have the free bus pass. Table 12 shows that just over a third (36%) would make the same trip using another mode of travel. Of these respondents, most (69%, n=500) said they would most likely travel by car instead (see Annex - Table 15).

Table 12 Thinking about your main journey purpose in the last 12 months, what would you do if the free bus pass was not available? (survey respondents)

Response	Number	Percentage
I would make the same trip by another mode of travel	726	36%
I would make the same trip by bus and pay for a ticket	523	26%
I would not make this trip at all	507	24%
I would make the same trip by bus using another free bus pass I am eligible for (e.g. an Under 22s pass)	59	3%
Don't know	226	11%
Total	**2,041**	**100%**

Note: six respondents did not answer this question.

Among those with an over 60 card (see Annex - Table 16), those aged 80+ would be more likely to continue using the bus and pay for a ticket (42%) compared to around a quarter of those across all other age groups. Those in the younger age groups would be more likely to use another mode of transport (47% for both 60-64 and 65-69 year olds) compared to older cardholders (33% of those aged 80+). While the sample sizes in several age groups were too small to make reliable comparisons regarding which alternative mode would be used, the most common response remained a car, with around three quarters of each age group selecting this option.

Survey respondents were also asked to consider all the journeys they make by bus and indicate if there were any they would make less often if they did not have the free bus pass. Table 13 shows that across all journey purposes the majority of respondents would either use the bus less or not at all if they did not have the free bus pass. The proportions of respondents that would continue to use the bus as often as they do currently, ranged from just 14% for day trips and holidays, to 39% for health and medical appointments/services.

Table 13 Are there any bus trips that you would not make, or would make less often if you did not have the free bus pass? (survey respondents)

Response	Would use the bus as often as I do now	Would use the bus less often	Would not use the bus at all	Total (n)
Education/training	26%	44%	30%	149
Commuting to/from work	35%	36%	29%	153
Travelling within my job/as part of my job	32%	34%	34%	89
Volunteering	21%	43%	36%	202
Social and leisure purposes	18%	52%	30%	731
Shopping and personal business	19%	49%	32%	807
Health and medical appointments/services	39%	38%	23%	744
Visiting family and friends	19%	52%	29%	701
Day trips and holidays (including overnight trips)	14%	42%	44%	564
Just to get out	17%	34%	49%	477

Note: those who said they did not know have been removed from the above analysis.

Impact on different mode use

Survey respondents were also asked whether the free bus pass had changed how often they travelled by different modes of transport. Table 14 outlines the results, and shows that most respondents (81%) felt they used the bus more often because of the free bus pass. In addition, nearly two thirds (61%) felt they used a private car less often, while just over half (55%) said they used taxis less often. There were more mixed responses in relation to the use of trains and walking.

Table 14 Thinking about all the travel you make, do you think that the free bus pass changed how often you travel by each of the following modes of transport? (survey respondents)

Mode	Use more often	No change	Use less often	Total (n)
Travel by bus	81%	17%	2%	1,929
Travel by train	19%	51%	30%	1,576
Travel by taxi	5%	40%	55%	1,239
Travel by private car	7%	32%	61%	1,477
Walking (including getting to/from bus stop)	28%	60%	12%	1,630

When the results were disaggregated by card type (see Annex - Tables 17-21):

- There were no real differences in travel by **bus** or **walking** between those with an over 60 card and disabled cardholders.
- Those with a disabled card were slightly more likely to travel by **train** more often (23%) compared to those with an over 60 card (17%).
- Those with a disabled card were more likely to travel by **taxi** less often (61%) compared to those with an over 60 card (51%).
- Those with an over 60 card were more likely to travel by **private car/ van** less often (64%) compared to those with a disabled card (53%).

Several focus group participants also reported that they used the bus more after receiving the NEC than they had done beforehand. This was mainly because it was free and they wanted to realise the cost-savings offered. However, changes in the frequency with which the Scheme was used over time also varied greatly. Some, who were currently regular users, had always been so. Meanwhile, others reported that their use had increased with their confidence over time, i.e. as they became more familiar with how the buses operated, the routes available, timings, etc. Very few said that their use had decreased over time, with exceptions for health reasons and for those in areas where there had been cuts to bus services.

In relation to cardholders' use of other modes, both survey and focus group participants noted that the Scheme had reduced the need for, and the costs associated with taxis. While several focus group participants explained that they were still reliant on taxis for some journeys (where suitable bus routes did not exist), the bus gave them the option to avoid what they perceived as costly and sometimes stressful taxi journeys (by being driven by a stranger).

Several focus group participants noted a preference for using the train, particularly when travelling on longer journeys. This was mainly because they viewed trains as being faster, more efficient, more comfortable, more accessible, and having better facilities. Comments were also made in several focus groups that the assistance provided by train staff to those with disabilities was very good, and that this gave them added confidence to travel that way (instead of by bus). The choice between using either bus or train was also often linked to timings and whether people needed to be at a certain place at a certain time.

Several survey respondents also highlighted that they were able to use the NEC on other modes of transport, such as the train, the subway, the tram, and ferries, where discounted or free travel was supported. As a result, they said they also used these modes more often than they would otherwise.

Further, survey respondents highlighted that the Scheme allowed easy trip-chaining (i.e. making several journeys on different buses per day) without adding the cost burden of this. This was particularly supportive for those with disabilities as it meant they could alight from the bus before they had completed their journey, and then rejoin on a later bus (e.g. if they needed the toilet, experienced pain or anxiety, etc.).

Private car use remained high among focus group participants for longer and cross-border journeys, as well as journeys that required a ferry as part of the trip. A small number also commented that it was inconvenient to book different tickets to cover trips across the Scottish border. In some cases, cardholders paid for a single, uninterrupted ticket instead (forfeiting the free part of the journey in Scotland).

Some focus group respondents reported walking for short journeys. However, walking was not practical for most of the journeys cardholders made.

Impact on car use

Overall, 76% (n=1,839) of survey respondents said that they had access to a private vehicle at some point whilst holding their free bus pass, either currently or previously. These respondents were asked to indicate the impact that the free bus pass had on their use of this private vehicle. Table 15 details the results. Just under half (45%) said they used a private vehicle a little less, while just under a third (31%) used it a lot less.

Table 15 What impact, if any, has the free bus pass had on your private vehicle (car/van) use? (survey respondents)

Response	Number	Percentage
I use a private vehicle **a lot less** because of the bus pass	558	31%
I use a private vehicle **a little less** because of the bus pass	797	45%
There is **no change** in my use of a private vehicle because of the bus pass	402	22%
I use a private vehicle **a little more** because of the bus pass	15	1%
I use a private vehicle **a lot more** because of the bus pass	18	1%
Total	**1,790**	**100%**

Note: 49 respondents either did not know or did not answer this question.

Responses were also disaggregated by card type, how well respondents were managing financially, and age group among those who held an over 60 card (see Annex - Tables 22-24):

- Results were largely consistent between those who held an over 60 card and those with a disabled card.
- Those who were experiencing financial difficulties were more likely to report that they used their private vehicle a **lot less**, while those who were managing well were more likely to use it a **little less**.
- Among those with an over 60 card, those in the oldest age group (age 80+) were slightly more likely to use a private vehicle a **lot less** compared to those in the younger age groups (age 60-69).

Several survey respondents also noted within their qualitative comments that they drove much more frequently before they had the free bus pass, with others suggesting that they would be forced to drive more often if they did not have it. In particular, the Scheme encouraged some people to use the bus for longer journeys or where driving and parking were seen as challenging:

> *"Hardly used bus till had pass. Went from two cars to one, and drive much less often. Found bus more convenient than driving due to bus lanes at peak times." Over 60 cardholder - survey respondent*

In addition, several survey respondents suggested that the Scheme also encouraged use of park and ride where buses were not available in close proximity to the cardholder's home.

However, it is worth noting that in some focus groups, both over 60 and disabled cardholders reported that they often felt forced to use the bus instead of private vehicles when travelling into cities, rather than choosing to do this. In most cases this was due either to the perceived complexity of navigating city centres by car and/or the prohibitive costs and challenges of parking in cities.

Survey respondents and focus group participants also reported changes in bus use linked to changes in their car ownership/driver status. Some people had opted to give up the car for financial reasons or had stopped driving (either temporarily or permanently) due to accidents or poor health. For this cohort, while free bus travel had not been the main reason for a reduction in car use, it had helped to support their mobility when in need. For others, however, the Scheme had more directly supported the transition away from reliance on private cars:

> *"I'd take the car everywhere if I didn't have this. If I didn't use the pass, I would take the car everywhere." Disabled cardholder - focus group participant*

Several focus group participants did, however, report that they still used cars or private vehicles to make journeys, either as a driver or passenger - this was especially true for people who owned their own vehicles. The reasons included the additional flexibility and convenience a car afforded, as well as practicalities.

Impact on travel frequency and destination

Many survey and focus group respondents indicated that the Scheme encouraged them to get out and travel more often, and to travel further afield and to new places.

Most survey respondents (83%) either agreed or strongly agreed that the free bus pass encouraged them to travel by bus more often (see Table 16).

Table 16 The free bus pass encourages me to travel by bus more often (survey respondents)

Response	Number	Percentage
Strongly agree	1,222	51%
Agree	767	32%
Neither	253	11%
Disagree	93	4%
Strongly Disagree	54	2%
Total	**2,389**	**100%**

Note: 113 respondents either did not know or did not answer the question

Both survey and focus group respondents said they travelled more often, either compared to before they had their free bus pass or more than they would if they did not have it. This included making more regular local journeys, such as for shopping, to visit family and friends, to socialise, meet people, visit local cafes, etc. Several also indicated that they had more days out and travelled further afield more often than they would if they did not have the free bus pass. In particular, companion cardholders noted that their free made travelling much more accessible, and gave them the confidence to travel further afield and to new or less familiar places.

Across both local and longer distance journeys, respondents reported both making new trips (i.e. those they would not have made at all), and making trips more often.

In addition, across both survey and focus group respondents, those that had received their NEC more recently indicated that they planned to use the bus much more frequently in future. This was particularly the case for the over 60 cardholders who had not yet retired but thought they would use the bus more once they retired, and for those who still drove but who planned to use the bus more when they were no longer able to drive.

In terms of travelling to different destinations, both older and disabled survey respondents said they had been encouraged to make day trips, travel further afield and take holidays. Again, many said they would not have done this without the free bus pass. This was a sentiment echoed across the focus groups as well:

> *"Having the bus pass gives me the opportunity to travel and get out for things other than appointments which I would not have done at all before without it." Disabled companion cardholder - survey respondent*

In addition to accessing more urban leisure pursuits, several respondents highlighted that the Scheme had allowed or encouraged them to access more rural areas. They noted that they travelled more often now to take walks, and to access parks, green space and the countryside.

Addressing inequalities

Summary

- The Scheme is used often to support access to healthcare
- Smaller gains for volunteering, work, and education
- Access to services was improved to a greater extent for disabled cardholders
- Most cardholders reported that the Scheme saved them money and reduced travel costs
- Disabled cardholders, and those with financial difficulties, were more likely to think the Scheme saved them larger amounts of money

Access to services

Table 17 details levels of agreement among survey respondents on whether the free bus pass had improved access to education and training, healthcare, work, and volunteering opportunities. The biggest improvements were in relation to access to healthcare, where half of the respondents (50%) either agreed or strongly agreed that the free bus pass had improved access.

Table 17 Access to services (survey respondents)

Response	Strongly agree	Agree	Neither	Disagree	Strongly disagree	Total (n)
The free bus pass has improved my access to **education and training**	8%	12%	54%	16%	10%	2,070
The free bus pass has improved my access to **healthcare**	21%	29%	29%	14%	7%	2,360
The free bus pass has improved my access to **employment** opportunities	7%	11%	52%	18%	12%	2,097
The free bus pass has improved my access to **volunteering** opportunities	10%	17%	49%	15%	9%	2,115

Across all aspects, a greater proportion of disabled cardholders indicated that it had improved access compared to those who held an over 60 card (see Annex - Tables 25-28). Table 18 below provides a summary of responses and shows that the largest difference was in access to healthcare, where 70% of disabled cardholders either agreed or strongly agreed that the free bus pass had improved access, compared to 38% of over 60 cardholders.

Table 18 Access by card type - those who agreed or strongly agreed (survey respondents)

Response	Over 60 card	Disabled card	All respondents
The free bus pass has improved my access to **education and training**	11%	35%	20%
The free bus pass has improved my access to **healthcare**	38%	70%	50%
The free bus pass has improved my access to **employment** opportunities	9%	34%	18%
The free bus pass has improved my access to **volunteering** opportunities	23%	36%	27%

Across the survey feedback and the focus groups, most discussion focused on the way that the Scheme improved or supported access to work and volunteering opportunities. There was evidence that people had found new jobs and volunteering opportunities as the Scheme had facilitated travel to different areas:

> *"I was able to change job a couple of years ago thanks to free bus pass enabling me to travel further from home." Over 60 cardholder - survey respondent*

It had also allowed people to take on particular jobs, part-time roles and volunteer positions which would not have been cost effective if paying the fare. Focus group participants who volunteered for charities also noted that the Scheme meant that they did not have to pass on travel expenses to the charities, which they felt was a valuable social impact.

Only a few survey respondents discussed how the Scheme had improved access to education. This had been beneficial both in terms of facilitating physical access, but also helping to reduce the cost of access and student life.

Financial impact on cardholders

The vast majority of respondents (93%) either agreed or strongly agreed that the free bus pass had saved them money, with little difference by card type (see Table 19).

Table 19 The free bus pass saves me money by card type (survey respondents)

Response	Over 60 Card	Disabled Card	All respondents
Strongly agree	58%	65%	61%
Agree	34%	29%	32%
Neither	6%	5%	5%
Disagree	1%	<1%	1%
Strongly Disagree	1%	1%	1%
Total	**1,533**	**875**	**2,408**

Note: 94 respondents either did not know or did not answer the question

All survey respondents that had used their free bus pass in the last 12 months were also asked to indicate how much money they thought this had saved them, on average, per month. Table 20 shows that, while 17% did not know, 80% thought that they had saved some money, compared to just 3% who said they had not saved anything. Responses were mixed in relation to the amount that had been saved.

Table 20 Thinking about the last 12 months, please indicate how much money, if any, you think the free bus pass has saved you on travel each month? (survey respondents)

Response	Number	Percentage
Nothing	75	3%
Up to £10 a month	515	21%
Over £10 and up to £50 a month	960	40%
Over £50 and up to £100 a month	307	13%
More than £100 a month	133	6%
Don't know	406	17%
Total	**2,396**	**100%**

Note: 14 respondents did not answer this question.

Disabled cardholders were more likely to think it saved them larger amounts of money (i.e. over £50 and over £100) compared to those with an over 60 card. Similarly, those who had financial difficulties were more likely to indicate that the Scheme saved them larger amounts of money compared to those who managed well financially. There were also differences in the amounts saved by age among those with an over 60 card, however, there was no real pattern. Disaggregate results are provided in the Annex - Tables 29-31.

All focus group participants also agreed that the Scheme helped them to save money. Even those who rarely used their NEC appreciated the savings they made when they did use it, especially given the comparative cost of using trains or taxis for the same journeys.

People who had become disabled or sight impaired more recently, or who had recently qualified for the over 60 card were perhaps most likely to comment on the notable cost impacts:

> *"I used to travel by train mostly for like socialising and stuff and I just can't afford the train now, even with the disabled discount, you know, the bus is free or like maybe £1 to book something, so it's much better for me." Disabled cardholder - focus group participant*

Companion cardholders also stressed that the Scheme either meant they did not have to shoulder the cost of the companions travel, or allowed them to pass on financial savings to carers/companions. This helped them worry less about being impacted by or imposing financial burdens. Without access to the companion element of the Scheme, respondents reported that they would have either avoided the journey or paid for the companion to travel out of their own pocket. In that sense, the Scheme was seen as providing a double saving.

Both survey respondents and participants across different focus groups, and different card types, also commented that the Scheme helped them to save on overall costs for things such as shopping. A few noted that they were able to travel to cheaper supermarkets rather than having to shop in more expensive local convenience stores. Others suggested that they were able to visit shops more frequently rather than waiting to build up a longer list of needs or reasons for making a journey before venturing out (which they might do if they had to pay the bus fare).

Overall, it is worth noting that while most cardholders welcomed that the Scheme afforded free travel if or when they needed it, for some, the financial saving was not sufficient enough to overcome the inconvenience of bus travel. Also, for longer, inter-city journeys where people had to pre-book seats, there was some disquiet among a small number of respondents that they had to pay a booking fee. It was felt that this undermined the 'free' element of the Scheme.

Health and wellbeing

Summary

- Strong evidence that the Scheme improves freedom, independence and choice
- Strong evidence that the Scheme improves physical and mental health and wellbeing
- Strong evidence that the Scheme can help to reduce social isolation
- Most cardholders felt safe travelling by bus, but there were some concerns about anti-social behaviour, with disabled cardholders less likely to feel safe and be more concerned about anti-social behaviour

Personal welfare

Table 21 details the extent to which survey respondents agreed or disagreed that the free bus pass had impacted on aspects of their personal welfare.

Table 21 Personal welfare (survey respondents)

Response	Strongly agree	Agree	Neither	Disagree	Strongly disagree	Total (n)
The free bus pass gets me out/out more often	32%	31%	24%	9%	4%	2,256
The free bus pass allows me to socialise or do leisure activities more	30%	33%	24%	9%	4%	2,353
The free bus pass gives me independence/freedom	35%	34%	21%	7%	3%	2,348
The free bus pass gives me confidence to travel	26%	32%	29%	9%	4%	2,296
I'm more active because of the free bus pass (e.g. due to walking to the bus, getting out more)	26%	31%	27%	11%	5%	2,372

Response	Strongly agree	Agree	Neither	Disagree	Strongly disagree	Total (n)
I feel less isolated or lonely because of the free bus pass	25%	26%	30%	12%	7%	2,325
The free bus pass has improved my mental health and wellbeing	26%	26%	33%	10%	5%	2,326

Across all the statements at least half of the respondents agreed that the free bus pass had had a positive impact. This ranged from 51% who agreed that they felt less isolated or lonely because of the free bus pass, to 69% who agreed that the free bus pass gave them independence/freedom.

The results were also disaggregated by card type (see Annex - Tables 32-38). An overview of those who agreed or strongly agreed is outlined in Table 22 below. Across all statements, those with disabled cards were more likely to agree compared to those with an over 60 card.

Table 22 Personal welfare by card type - those who agreed or strongly agreed (survey respondents)

Response	Over 60 Card	Disabled Card	All respondents
The free bus pass gets me out/out more often	54%	79%	63%
The free bus pass allows me to socialise or do leisure activities more	57%	74%	63%
The free bus pass gives me independence/freedom	63%	81%	39%
The free bus pass gives me confidence to travel	52%	70%	58%
I'm more active because of the free bus pass (e.g. due to walking to the bus, getting out more)	52%	66%	57%
I feel less isolated or lonely because of the free bus pass	42%	66%	51%
The free bus pass has improved my mental health and wellbeing	44%	68%	52%

Freedom, independence and choice

The positive feedback above was backed up by many of the qualitative comments provided by survey and focus group respondents. Many said the Scheme had given them a sense of freedom and that they were able to make journeys by bus that would be financially prohibitive to make in any other way or to do often. It enabled them to be social and active, and to stay in touch with family and friends (including those who lived some distance away/in other parts of Scotland):

> *"Due to my disability, I would not be able to and could not afford to visit my family, and I would be stuck at home. The bus pass gives me a little bit of freedom and takes a little bit of stress out of having to travel." Disabled companion cardholder - survey respondent*

Similarly, several focus group participants mentioned that the Scheme gave them more choice, both in terms of how to travel and how to use their money.

The Scheme was also considered to have provided independence for cardholders, as they did not have to rely on others. In addition, a few survey and focus groups respondents suggested that the Scheme helped to build young disabled cardholders' confidence, social skills, and the skills needed for independent travel as they grew up and became less reliant on their parents for travel. Again, however, the benefits of freedom and independence were often limited by the lack of bus services (especially for those in rural and suburban areas).

Physical and mental health

Some survey respondents said that, without the Scheme, it would be difficult or impossible to attend medical or other appointments, to get to education or work, or that they would be much less likely to do volunteer work, as the travel costs would be prohibitive. Respondents also noted that the Scheme kept them more active, thereby supporting their physical health. They also noted that the ability to get out, to meet people, to take part in activities, etc. helped their mental health and wellbeing:

> *"I get out and about more with the free Disability plus companion bus card, which in turn benefits my mental health and increases my confidence." Disabled companion cardholder - survey respondent*

Some survey respondents and focus group participants also reported using the Scheme to visit local parks or outside spaces to take walks, or to go further afield into the countryside, to support hiking and other active leisure pursuits, and to allow them to attend the gym and to play sports. It was felt that each of these had a positive impact on mental and physical health. Specifically, one focus group participant who had been recently bereaved said that they had used the free bus pass to take them to outdoor/park spaces following the loss of their partner and that this had helped with the grieving process. Another widower explained how they had become demotivated to leave home following the loss of their partner, but that they had been encouraged by a local charity to use the free bus pass to access their day-care facilities, which had been “a lifesaver”.

Other mental health impacts included feelings of reduced anxiety, stress or worry linked to travel. In some cases, this was linked to removing the financial cost of travel, while for many this was related to knowing that the bus driver would carry the stress of navigating roads, etc.

Comments were also made across focus groups that the Scheme sometimes encouraged people to be more active or sociable, for example, by removing excuses or reasons for not going out that might be linked to concerns about cost, parking, the hassle of driving, etc.:

> *“It kind of like forces me sometimes to go and say, look, do you want to just go and do it rather than just staying in the house and make any excuse not to do it. So, it’s good in that respect…it just helps me to take that step that I might not bother doing otherwise.” Disabled cardholder - focus group participant*

Companion cardholders also stressed that this gave them the confidence to travel, made them feel safer, and meant they could travel as often as required without having to worry about the cost of the companion’s ticket or feeling like a burden by asking the companion to pay their own fare. This in turn, reduced stress and anxiety related to travelling, and resulted in both physical and mental health benefits:

> *“I cannot travel without my carer because of my autism and learning disability. The free bus pass +1 makes it so much better as it gives me the ability to travel as much as I need to go to my favourite activities and to meet friends without having to pay for all trips for the person who's traveling with me because of my needs. That encourages me to go out more often which has a great positive impact on my physical as well as on my mental health.” Disabled companion cardholder - survey respondent*

A small number of focus group participants also expressed concerns that their wellbeing and mental health might deteriorate if the free bus pass was taken away.

A few survey respondents also appreciated the term ‘entitlement’ within the terminology for the Scheme. It was considered to provide recognition of disabled people's needs, and for older cardholders, it provided recognition that they had contributed in taxes until (and sometimes beyond) retirement.

Reducing social isolation

There was also a sense among survey respondents and across focus groups that many cardholders would not get out as often if they did not have their NEC, as the costs of fares were restrictive. As such, they would be much more isolated:

> *"I travel quite a long distance [for sport], so it's quite important to me socially. I live on my own…So if I was to have to pay the bus fare to get there, it would be really expensive…if I had to pay the full fare, it would be probably out of the question I think." Over 60 cardholder - focus group participant*

It was felt that the Scheme provided a connection to other people, including the bus driver or through meeting and talking to other people on the bus. Often cardholders would meet others that they knew on the bus, but some were also happy to strike up conversations with fellow passengers that they did not know. This was true for both local and long-distance journeys, and was highly valuable to those who were at risk of social isolation otherwise.

The Scheme also helped cardholders to feel like they were part of the community:

> *"It is a wonderful thing for us in our old age. It gives us our ability to travel to see our grandchildren and help our families. It makes us feel needed in society because we can get about without having to rely on others and we can be useful in so many ways i.e. volunteering, shopping for others." Over 60 cardholder - survey respondent*

Some survey respondents and support organisations who participated in an interview, also indicated that the Scheme allowed some disabled people to access their peers and be part of a larger community, where they can be supported, take part in social events and activities, etc.

Similarly, participants across multiple focus groups indicated that the Scheme helped them to socialise, to travel with family and friends at lower cost, and to be more adventurous than they might otherwise have been, all of which helped with feelings of self-esteem and social inclusion. Moreover, focus group participants with poor health who had become reliant on buses also commented that use over time had helped them to reintegrate socially and become more active again in their social lives, i.e. impacting positively on confidence and self-esteem.

A few focus group participants (across different sessions) commented that the range of concessionary travel schemes, including for older, disabled and younger people, meant that it created opportunities for interactions. While this results in tensions on occasion (as noted elsewhere), several perceived this interaction and visibility of different demographics to be of added social value, which they said was often missing in many areas of social life. In particular, exposing young people to older and disabled people was also seen as valuable for normalising aging and disability, and in supporting inclusion:

> *"I suppose, it's an opportunity, isn't it, for disabled people, elderly, younger people, all to be in close proximity in maybe a way that they wouldn't normally be. Now, I'm not saying that's always going to be a great experience for everybody but it's got the opportunity to, which I think is a nice thing, you know, cos you don't always get that kind of mixture in everyday life." Disabled cardholder - focus group participant*

Overall, the Scheme appears to have had positive impacts on people's mental health; encouraged people to get out and be more active; improved their confidence, freedom and independence; improved their ability to socialise and do leisure activities; and reduced social isolation.

Personal safety

Most (78%) survey respondents agreed or strongly agreed that they felt safe travelling by bus (see Annex - Table 39). Meanwhile, just 5% of frequent users (i.e. those who used the bus about once a fortnight or more) and 4% of less frequent users (i.e. those who used it less than once a fortnight) noted that they did not use the bus more often because they did not feel safe (see Annex - Table 11). This is similar to the Your Bus Journey survey results for Scotland which show that for the most recent year (2025), 88% of all bus passengers rated their personal security while travelling by bus as good.

Despite this high level of overall safety, some respondents did report perceptions of or concerns about anti-social behaviour. In general, 45% of survey respondents agreed or strongly agreed that there was anti-social behaviour on buses (see Annex - Table 39). Almost a fifth (17%) of more frequent bus users and 13% of less frequent bus users noted that they did not use the bus more often because they were concerned about anti-social behaviour (see Annex - Table 11).

There were, however, differences by card type, with disabled cardholders less likely to feel safe travelling by bus (65%) and more likely to think there was anti-social behaviour on buses (56%), compared to those with an over 60 card (85% and 39%

respectively) (see Annex - Tables 40-41). Similarly, disabled cardholders were more likely to feel unsafe (10%) and be concerned about anti-social behaviour (25%) when asked about the reasons they did not travel by bus more often, compared to those with an over 60 card (2% and 12% respectively) (see Annex - Table 12).

Among the qualitative feedback (across both the survey and focus groups), cardholders discussed feeling unsafe due to anti-social behaviour and the number of Young Persons' Scheme cardholders now using buses. Issues around feeling unsafe at bus stops or interchanges that were poorly maintained or poorly lit were also reported in some cases.

Wider impacts

Summary

- **Most thought buses were environmentally friendly and that the Scheme contributed positively by reducing car use, carbon emissions, and reducing road congestion**
- **Evidence of positive impacts on the local and wider economy**
- **Lack of knowledge and consistency of additional uses/ benefits of the NEC**
- **Overall satisfaction with the Scheme was very high**

The environment

Whilst survey respondents were not asked about the impact of the Scheme on the environment specifically, most thought that buses were environmentally friendly (78%) and that bus travel helped to make the roads safer (68%) (see Annex - Table 39). The results in the chapters above also show that cardholders generally used the bus more often (where it was available and accessible), and that the Scheme had reduced levels of car use. Both survey and focus group respondents also discussed perceptions that the Scheme would have a positive environmental impact, both in terms of reducing pollution/carbon emissions (particularly where electric or low emission buses were in place), and in reducing congestion.

A few focus group participants confirmed that environmental impact was an important factor for them and their travel decisions. Several private vehicle owners also said that they had cut their own car use as a result of holding the NEC, and this had reduced their own emissions.

Some also commented that they welcomed a reduction in congestion and improved road conditions linked to the reduction of private cars on the roads:

> *"I mean, my experience is I'm using the car less, therefore it's an environmental benefit and that does mean a lot to me. And it's also, you know, taking cars off the road, so it's actually improving the road…for other road users too." Over 60 cardholder - focus group participant*

Some participants who wanted to be more environmentally friendly, however, again raised concerns that poor public transport provision meant that their good intentions could not be realistically achieved.

The wider economy

While survey respondents were not asked specifically about impacts on the economy, several did indicate concern for the cost of the Scheme to the government, local authorities, and the tax payer. It should be noted that the Value for Money assessment conducted as part of this evaluation (and reported separately), however, showed that the cost of the Scheme was largely in line with the measurable value of the benefits it brought. Note that the Value for Money assessment did not consider the wider economic factors explored below.

Many respondents noted that they used the Scheme to access local services and spend money in their own local economy. Some also indicated that they used the Scheme to travel to new places and/or further afield, and that they would therefore spend money in that local economy. While much of this may result in displaced spending (i.e. moving spending from local areas to those further afield), many indicated that they travelled and got out and about more often. As such, at least some new or additional journeys were being made, as well as some degree of additional spending in the local economy. As noted above, a few respondents also discussed how the Scheme allowed them to find or remain in work, or to access and sustain volunteering opportunities. Some also supported working family members by using the Scheme to allow them to provide childcare, typically grandparents looking after grandchildren.

Several focus group participants also acknowledged that the Scheme helped to generate spend. In particular, it was noted that older people were among the most likely to have disposable income in society. They were also perhaps more likely to stay 'local' in their travel which meant that economic benefits were being felt by local communities specifically:

> *"Being free does encourage people to go out more and therefore, you know, even if it's as much as having a cup of tea and a slice of cake, it brings money to the local economy, which therefore generates more jobs, which then helps the whole community." Over 60 cardholder - focus group participant*

In addition, the Scheme was considered an important element which enabled disabled people to contribute to the wider economy, either by supporting them to access work or volunteering opportunities, or to access services. In one focus group, a sight impaired cardholder explained that there was strong evidence to suggest that disabled and sight impaired people could contribute significantly to the economy, if access allowed:

> *"It's been well modelled. In many demographics in society, disabled people actually contribute much higher to the local economy than several demographics in society. So, you've got that unspent potential economic value if you can give people the mobility and the independence to be able to access those services. Every person that is either economically or otherwise or physically barriered out from transport, that is one less person using restaurants, it's one less person contributing to High Street…" Sight impaired companion cardholder - focus group participant*

Some focus group participants also perceived that the Scheme would be valuable to bus operators, as it ensured a steady income through the reimbursement payments, and that usage by cardholders would help to keep services running.

Other uses of the NEC

Sometimes the NEC can be used for other things, with additional benefits being determined and provided by local authorities, or other organisations, rather than Transport Scotland.

All survey respondents were asked what else, if anything, they used their free bus pass for (see Annex - Table 42). The main additional uses (other than bus travel) were to access discounted or free train travel (26%), and as age verification or identification (15%). Almost half (47%) did not know they could use their bus pass for other purposes.

It was, however, highlighted by survey respondents, focus group participants, and support organisations, that these additional uses varied by region and by card type. For example, those who lived in Edinburgh were able to use their NEC to access free travel on the tram. Similarly, those with a sight impairment card could travel on the train either at a discounted rate or for free. It was stressed that this made it difficult for cardholders to know what they were entitled to, when and where. These additional uses/benefits were also not being experienced equitably across different areas and by card type:

> *"There is the disparity of those who get - so visually impaired get the free train, other disabled people, as I understand it, get it depending on the local authority. So, you could have a situation where somebody lives in Stirling and somebody lives in Larbert, they're literally seven miles apart, two different local authorities and two*

> *different schemes of doing things." Sight impaired companion cardholder - focus group participant*

Overall satisfaction

Survey respondents were asked to rate their level of overall satisfaction with the Scheme. Table 23 shows that the vast majority of cardholders (94%) were either very or fairly satisfied, while 4% were neither satisfied nor dissatisfied, and just 2% were either fairly or very dissatisfied. Results were consistent by card type.

Table 23 Overall satisfaction (survey respondents)

Satisfaction	Over 60 Card	Disabled Card	All respondents
Very satisfied	79.5%	75%	78%
Fairly satisfied	14%	20%	16%
Neither	4.5%	3%	4%
Fairly dissatisfied	1%	1%	1%
Very dissatisfied	1%	1%	1%
Total	**1,584**	**904**	**2,488**

Note: 14 respondents either did not know or did not answer the question.

Respondents were also asked to explain their reason for their level of satisfaction or dissatisfaction. Feedback was provided by 1,410 respondents.

Those who were satisfied with the Scheme (including some who noted that they rarely used it) generally outlined the benefits and positive impacts it provided:

> *"I am exceedingly satisfied with the free bus pass, I would be completely lost without it. It gives me access to so many things I would otherwise miss out on, life would be very difficult without it." Over 60 cardholder - survey respondent*

> *"It is an extremely simple but effective way of making my life more similar to that of my non-disabled peers. With it I don't feel like I have to rely on others for every small thing like I would if I didn't have it. I don't think anyone who has never lived a life with a serious physical disability could ever understand the difference it makes just to know you have the option to go out and join in with the world instead of sitting at home feeling like a burden." Disabled companion cardholder - survey respondent*

The main issues which reduced levels of satisfaction or drove dissatisfaction were the lack of bus services or routes available to respondents, poor local services, or problems with the accessibility of services. These meant that cardholders could not use the Scheme or access the benefits it provided:

> *"Due to the underlying poor service which creates a lack of opportunity to use it, creating an unfair system that favours urban dwellers and contributes to increased rural transport poverty and isolation." Over 60 cardholder - survey respondent*

Process and administration

Summary

- Bus operators were largely positive about the operation of the Scheme, though noted views related to reimbursement
- Most cardholders found it easy to get information about the Scheme, but misunderstandings and conflicting advice suggest further awareness raising may be needed
- Most found the application, renewal and replacement processes easy
- Some called for the application and renewal processes for disabled cards to be revised for consistency, ease and to avoid duplication of effort
- Cardholders wanted a mix of application and renewal formats - online, telephone, postal, and in-person options

Integration with bus operators

All bus operators that provided feedback felt that the administration, processes and operational requirements related to the Scheme were fully embedded within their own day-to-day systems and worked well. In particular, operators noted that the ticket machines and links with back-office systems were either very well embedded, or were largely automatic. This helped ensure the day-to-day administration and operation of the Scheme was as seamless as possible:

> *"The actual process, you know, day to day operation, is fully integrated into the business and I would say it's fairly seamless daily transactions that go on." Commercial bus operator*

Even where manual records of journeys were necessary for reimbursement, for example in remote areas with poor internet connection, the process was still considered to be well embedded and was viewed positively.

Survey respondents were asked if they had experienced any practical problems when using the free bus pass in the last 12 months. Table 24 shows that around three quarters of respondents (74%) had not experienced any problems, while 14% had experienced machines on the bus being broken.

Table 24 Have you experienced any of the following practical problems when using the free bus pass in the last 12 months? (survey respondents)

Problem	Number	Percentage
Not experienced any problems	1,764	74%
Machines on the bus being broken	328	14%
Card not working, not recognised by the machine	225	9%
Problems physically putting the card on the machine (onboard buses)	133	6%
Problems booking seats (where this is an option, e.g. coach journeys)	43	2%
Any other problems	112	5%
Total (base)	**2,374**	**100%**

Note: multiple responses were possible at this question to percentages do not add to 100%.

Bus operators felt that the administration of reimbursement for concessionary journeys was well established and generally worked well.

One operator suggested that continuity of staff within both their organisation and at Transport Scotland was helpful to ensure a high level of knowledge and understanding of the Scheme and the required systems. All three commercial operators reported good relationships with Transport Scotland which were helpful and supportive in administering the Scheme and dealing with any issues that arose. One also suggested that it was helpful and more consistent having to deal with just one central authority rather than separate local authorities.

Meanwhile a community transport provider noted that support was provided by their local authority to administer and manage the Scheme, which helped with the smooth operation.

A few operators highlighted that, among other communications, a regular newsletter was published which helped to keep operators up to date. However, this received mixed reviews in terms of its usefulness. While most found this helpful, there was some concern that important information could be missed.

Larger operators also noted that they had a dedicated account manager and would have regular catch-ups. Some were also members of the Confederation of Passenger Transport (CPT) which helped to disseminate information about the Scheme and liaise with Transport Scotland on behalf of the industry in relation to more strategic and policy level issues. One operator did feel, however, that there was scope for more collaborative working and greater engagement between Transport Scotland and operators.

Impacts on bus operators

Most commercial operators indicated that the Scheme had not had any significant impact on the routes or timetables provided, the markets that they targeted, or on patronage patterns, (at least not more recently - they found it difficult to consider the full 19 year operational period). Rather, they tried to offer services suitable to all passengers, developed networks based on changing communities and usage patterns, and updated services based on the total demographics and needs of all passengers. Similarly, community transport providers did not report changes in services as a direct result of the Scheme, but noted changes in service provision due to the Covid pandemic and changing local demographics (such as an aging population) instead. Importantly, two community transport providers noted that it was increasingly difficult to operate suitable services in remote rural areas which sought to serve older and increasingly frail populations using the permit model required for eligibility in the Scheme:

> *"I wouldn't even guarantee in five years that we'll be doing the Section 22 routes [i.e. those eligible for the Scheme]…we have…minibuses which really are underused and, of course, if they're underused, they're costing a lot more to get repaired cos the brakes are seizing up. So, I wouldn't be at all surprised in five years if we're just operating a fleet of vehicles on a Section 19 permits [i.e. not eligible for the Scheme]." Community transport operator*

Amongst operators there was typically no ongoing impacts of the operation of the Scheme, and any training required for new drivers was largely embedded in standard practices. Operators discussed providing training, awareness raising, and working with third sector organisations related to disabilities, carrying older passengers, and safeguarding. They also noted that they had been updating their fleets to improve accessibility. However, any changes implemented in this respect were said to be linked more to equality legislation and industry guidelines. Only one operator identified ongoing training as a direct result of the Scheme. They provided annual driver refresher training which included consideration of the rules of each concessionary travel scheme and how to identify and tackle fraudulent use.

Commercial operators indicated that while they undertook engagement with service users to inform service provision and any changes, this tended to include the broad range of users, and did not specifically target older and disabled users. Community transport organisations did not identify any engagement activities with passengers, or specifically with older and disabled cardholders.

One commercial operator acknowledged that the Scheme had grown to become a much bigger part of their income and represented an important part of their commercial offering - but this was not necessarily positive:

> *"I think what it's done is it's taken, you know, effectively a lot of our commercial income and put it in the hands of the Scottish Government. Now, that's a bit of a scary place to be when they're ultimately deciding, you know, what you're going to get paid for carrying the passengers. So it does feel there's a degree of regulation creeping in through fare control." Commercial bus operator*

Issues and challenges for bus operators

The main challenge raised by operators related to their views on the rate at which journeys made under the Scheme are reimbursed.

Bus operators are financially reimbursed for each individual journey made under the Scheme and the Young Persons' Scheme. Scottish Ministers have an objective (but not a duty), set out in legislation, to ensure that bus operators are financially no better or no worse off as a result of their participation in the National Concessionary Travel Schemes. This principle underpins the methodology for calculating the rates, which also take into account latest industry data including operator costs and inflation. The rates are agreed annually following negotiation with Transport Scotland, the Confederation of Passenger Transport (CPT), and industry representatives. The methodology underpinning the annual calculation of the reimbursement rates was updated in 2024. This review considered the latest available evidence on industry costs, passenger demand and travel behaviours, and was agreed with CPT and industry representatives.

The fares that operators would have received from NEC passengers are calculated using the latest data on the basis of a percentage of equivalent adult single fare for observed NEC journeys. This is then reduced by a 'discount factor' to account for NEC passengers' expected use of multi-journey/discounted products (daily, weekly, season tickets). An annual budget cap is also applied to the Scheme as a whole.

Four out of the six bus operators who provided feedback as part of the evaluation discussed the reimbursement rate. Of these, three noted that the reimbursement rate had generally decreased each year or felt that this was now set too low. One also indicated that it caused uncertainty each year until the rate of payment was confirmed, making it difficult for operators to plan ahead.

Three operators also expressed views about their understanding of the way the reimbursement rate is calculated. They suggested that, the use of the adult single fare as the starting point for the reimbursement calculation could mean that operators may increase this in order to maximise the reimbursement payment (even with the discount factor applied). Their view was that this would result in increasing fares for paying passengers, both widening the financial divide between concessionary cardholders and non-cardholders, and making bus travel less attractive to paying passengers. There was also a suggestion that differing passenger demographics and travel patterns, as well as fare policies could introduce disparities between operators. However, the methodology used to set the reimbursement rates prevents this from being the case.

Another issue raised by one operator was the current delay in the registration process to deliver an eligible service. They noted that, to be eligible for the Scheme, the service must be registered via the Traffic Commissioner but there were long delays in registrations being approved. Agreements had been put in place to allow services to operate as long as the application has been made, but operators still cannot claim the reimbursement for journeys made under the Scheme from Transport Scotland without the registration. This could result in operators not receiving reimbursement for several months, and was a source of frustration for operators.

One commercial operator also noted that the Scheme did not operate in isolation, with several concessionary travel cards in operation. This made it challenging for drivers to always know which rules applied:

> *"I would say the biggest operational thing for us is just the additional work for the driver in terms of knowing what to do [for different cards]. So, if we only had that scheme, it would probably be OK, but because the Young Persons' Scheme exists, because the Asylum Seeker pilot now temporarily exists, and there are different rules for each of them but, at a glance, it's a card that has a saltire on it. It's more complexity and more difficulty for the driver to work out what to do where it doesn't work…" Commercial bus operator*

Marketing and information provision

Bus operators generally felt that most members of the public were aware of the Scheme, and that cardholders typically were well informed about how to use the NEC. A few operators indicated that they actively marketed the Scheme themselves, having information on their website; joining in with specific campaigns, for example, post-Covid; conducting leaflet drops; and local advertising.

The most common way that survey respondents found out about the free bus pass, however, was through word of mouth (for example, from friends, family, colleagues, etc.); 47% said they heard about it this way. All other ways were mentioned by a minority of respondents, with the next most common options being from a GP or health worker (8%), and the internet (6%) (see Annex - Table 44).

Responses by card type were highly mixed. Disabled cardholders were much less likely to have found out about the free bus pass via word of mouth (25%) compared to those with an over 60 card (60%). Conversely, they were more likely to have heard about it from a range of other sources compared to those with an over 60 card. This included a GP/health worker (20%), the internet (9%), advocacy or support group (8%), and a social worker (5%). Whilst word of mouth remained the most common way of finding out about the free bus pass for those who had financial difficulties, they were less likely to say this (32%) compared to those managing well financially (55%). In addition, those who had financial difficulties were more likely to say they found out from a GP or health worker (19%) compared to those managing well financially (3%). Disaggregated results are at Annex - Tables 45-46).

The majority of survey respondents (86%) found it either fairly or very easy to find the information they needed and how to apply for their free bus pass. Those who held one of the disabled cards were slightly less likely to find it easy and more likely to find it difficult compared to those with an over 60 card. Results are provided in the Annex - Tables 47-48.

However, several comments were made across the interviews with support organisations and the focus groups regarding inconsistencies in the information that was available or proactively shared. One support organisation noted that the differences between the types of cards and eligibility for each was not well understood by the public and sometimes by staff providing support. They noted that many disabled cardholders thought they had to switch to the over 60 card upon turning 60, with some even being told this by application service staff. For those with companion cards this means losing the companion element. One registered deafblind adult explained that they had been told different things regarding their eligibility at the hospital, by a local charity and then again by the local library. Another sight impaired cardholder explained that when they had tried to find out more about the Scheme their local charity had been unable to help.

One bus operator also thought that the information about who is responsible for the Scheme could be made clearer. They noted that some cardholders thought that the bus operators were responsible for it or that they could help them with getting a card.

Another bus operator suggested that greater awareness raising was required among the public and stakeholders so that the requirement to have a valid NEC to access free bus travel was clearly understood. They noted that the rules for operators were clear regarding the need for a card, in working order, but that these requirements were perhaps not clear to passengers or other stakeholders. For example, there were reports of notes being provided by library staff to confirm that a cardholder's replacement card had been ordered in order to secure free travel in the meantime. This can create difficult situations for drivers who need to implement the rules of the Scheme and take action to stop fraud, but still support those that have made a genuine mistake or are having a genuine problem with their card.

Some focus group participants and one bus operator also questioned whether there was sufficient information about the full scope of the use of the NEC. In particular, that it could be used Scotland-wide, including on coaches for long distance and inter-regional journeys. It was felt that greater awareness raising may be useful in this respect.

Similarly, some survey and focus group respondents felt that there was a lack of clear information about if and how the NEC could be used to access discounts on other modes of public transport. It was suggested that more could be done to raise awareness of this:

> *"…it would be useful to know what forms of transport you can use your bus pass on because that would maybe encourage us to use - to travel around more and to become more adventurous..." Over 60 cardholder - focus group participant*

A small number of focus group respondents also indicated that they were unsure about eligibility requirements for the companion element of the Scheme. They felt that information on eligibility and how to apply for this could be better advertised.

Focus group participants also suggested that more general information about the Scheme could/should be more readily available in non-digital formats to ensure inclusivity. It was felt there was perhaps too much reliance on online methods, which were often inaccessible to older people, those with certain disabilities, and those who experienced connectivity issues or digital poverty. There were also calls from support organisations and survey respondents for information to be made available in different formats, such as BSL and easy read.

The application process

Survey respondents were asked a series of questions about the application process. Responses to most questions can be found in the Annex - Tables 49-52, while overall views are outlined below.

Most respondents (85%) said they had found the application process they used either fairly or very easy, while only 6% had found it either fairly or very difficult (see Table 25). There were also very few differences when considered by the types of applications used.

There were, however, differences by card type and how respondents were doing financially (see Annex - Tables 53-54). Those with an over 60 card were more likely to find the application very easy (58%) compared to those with a disabled card (31%). Meanwhile those with a disabled card were more likely to find the process either fairly or very difficult (14%) compared to those with an over 60 card (3%). Similarly, those who were doing well financially were more likely to say the application process was very easy (59%) compared to those who had financial difficulties (33%). Meanwhile, those with financial difficulties were more likely to say that the process was fairly or very difficult (12%) compared to those doing well (4%).

Table 25 Ease of the application process by type of application (survey respondents)

Ease	Online	By post	Don't know/ can't remember	All
Very easy	48%	48%	51%	49%
Fairly easy	37%	34%	34%	36%
Neither	8%	12%	11%	9%
Fairly difficult	5%	4%	2%	4%
Very difficult	2%	2%	2%	2%
Total (n)	**1,474**	**415**	**452**	**2,341**

Several survey respondents felt that the application system was overly complex and not user friendly, especially for those with disabilities:

> *"It was incredibly taxing as a person with cognitive disabilities to go through this process, I had to resubmit more than once due to the format being incorrect, evidence not sharing specific pages, etc. Felt as though the poor system is a deterrent but effects people who most need the support." Disabled cardholder - survey respondent*

Similarly, the main challenges experienced by focus group participants related to applying for one of the disabled cards. These applications were said to require more paperwork/supporting evidence, and the process was therefore more protracted and difficult.

Both survey respondents and focus group participants stressed the need to maintain a choice of different ways to apply, including online, by post, in person and by phone.

However, there was concern that too much of the application process had moved online, with applicants finding it harder to access phone or in person routes.

Renewal and replacement process

Disabled cards contain an expiry date (maximum of three years from the date of issue) and therefore need to be renewed to ensure cardholders are still eligible. The over 60 card does not have an expiry date and does not need to be renewed. Any lost, damaged, or faulty cards need to be replaced.

Just under half of the survey respondents (42%, 1,044) indicated that they had renewed or replaced their card at some point. Of the 689 respondents who said they had renewed their card, most (77%) held a disabled card. Whilst the over 60 card does not expire, 161 respondents with this type of card stated that they had renewed it. Of those who had renewed their card, 26% indicated that they had been notified of the need to do this, while 61% were not notified. Around three quarters (74%) of those who had either renewed or replaced their card had found the process either fairly or very easy, compared to 16% who had found it either fairly or very difficult. When disaggregated by card type, Table 26 shows that disabled cardholders found the process less easy and more difficult compared to those with an over 60 card. Overall, 64% of disabled cardholders felt the process was fairly or very easy (compared to 88% of over 60 cardholders), while 24% felt it was either fairly or very difficult (compared to just 6% of over 60 cardholders).

Table 26 Ease of getting a new or replacement card by type of card held

Ease	Over 60 Card	Disabled Card	All respondents
Very easy	58%	29%	41%
Fairly easy	30%	35%	33%
Neither	6%	12%	10%
Fairly difficult	3%	15%	9%
Very difficult	3%	9%	7%
Total (n)	**436**	**596**	**1,032**

Focus group respondents noted considerable variations in the renewal processes between local authority areas and card types. Some disabled cardholders indicated that they benefited from a more automatic renewal process within their area (given their type of card and disability). Others with the same card type and similar disabilities, however, reported much more rigorous renewal processes, including essentially having to submit a new application each time. There were calls for this to be standardised across the country.

Among those who discussed problems, these tended to relate more to the renewal process rather than replacements. It was noted that the information about how to renew was unclear and that there was a lack of contact or engagement within some local authorities to provide advice and support:

> *"The renewal process for the card was pretty unsatisfactory despite the card itself arriving by post promptly. I spent hours going round in circles trying to work out how to renew the card." Sight impaired companion cardholder - survey respondent*

Survey respondents, focus group participants and bus operators noted that expiry dates on disabled cards were particularly problematic for some people. Those with particular disabilities noted that the expiry date was difficult to see or they struggled to remember it, meaning they often did not realise it had expired until it was rejected by a ticket machine onboard a bus. As such, a reminder letter or email (or auto-renewal and re-issuing the card where appropriate) would be helpful.

Similarly, where conditions are lifelong, will not improve, or where they are known to be degenerative (or where a lifelong disability benefits award has been made), many felt that there should be no expiry date on the card and no need for renewals:

> *"But for most people with vision impairment, it's quite uncommon that their condition would get better to the point of where they would be not be registered anymore...So, a big huge request is that we get rid of expiry dates on particularly for an Eye Plus One card." Sight impaired cardholder - focus group participant*

Several survey respondents and focus group participants also stressed that not all disabled people who are eligible for the Scheme are in receipt of disability benefits from either the Department for Work and Pensions (DWP) or Social Security Scotland (SSS). They noted that the application and renewal process was particularly difficult and stressful in these situations as cardholders were required to gain proof or signed agreement from medical professionals each time.

The requirement to renew the card every few years was also highlighted in focus groups and interviews with support organisations as an issue that disabled cardholders took into account when they reached the age of 60. It was suggested that the need to renew regularly was off-putting and challenging, and so some cardholders switch to the over 60 card in order to avoid the renewal process. However, for those with a companion card, they had to make a decision between continuing to renew regularly (despite being aged 60+) in order to retain the companion element, or lose the companion element and switch to an over 60 card to avoid the need to renew regularly.

A key issue for both survey respondents and focus group participants was to ensure a range of mechanisms were available for the renewal process. Several noted a preference for an online form rather than corresponding about renewals/ replacements by email. A dedicated online renewals and replacement form was also preferable to having to complete the main application again in full. Others were keen to ensure that easily accessible in-person services were in place, as well as a telephone helpline. A few cardholders also wanted dedicated support for particular conditions, e.g. deafblind people.

Suggested improvements to the Scheme from cardholders and operators

Summary

- Several aspects of the application and renewal process could be improved, particularly for disabled cardholders
- Greater consistency and clarity needed on additional uses/benefits of the NEC
- Some appetite for a digital NEC option as a complementary (rather than standalone) resource. However, it is currently only possible for people to have access to the Scheme in one format.
- Calls for expanding the scope of the Scheme, to allow free travel on trains, trams and the subway for all cardholders
- Additional driver training seen as being needed
- Operators made several suggestions about reimbursement

The application and renewal process

Survey respondents were asked what could be done to improve the initial application process as well as the renewal or replacement process, with around 300 respondents providing suggestions at each question. In addition, further comments and suggestions were provided across a number of other survey questions, while focus group participants also indicated areas for improvement. The main suggestions highlighted most often across both survey and focus group respondents are outlined below:

General information provision

- Provide clearer information about what is required to apply, replace or renew the NEC (including ID and any evidence needed), as well as guidance on where and how to do this.
- Reduce application processing delays and provide better and more timely communication to applicants about the process, any issues with their application, when to expect the card, etc. (Information is available online to

allow 10 days for a card to reach the recipient following an application, and both local authorities and getyournec should provide follow-up information regarding issues or reasons for failed applications).
- Conduct more extensive advertising and awareness raising about eligibility for the Scheme, and the nature and benefits of each card type.
- More information and awareness raising that a temporary seven day pass can be issued where cards are valid but have stopped working.

Changes to the online application and renewal process:

- Make the online information and application (both first and renewals) easier to find and navigate.
- Make the online application/renewal system more user friendly (this was one of the most common suggestions among survey respondents), in particular:
    - Improve the process for photos (including allowing a photo to be uploaded). While it should be noted that the upload facility for photos is already in place, survey respondents noted that this did not support picture file formats used by iPhones.
    - Allow for corrections and for documents to be uploaded and replaced.
    - Make it clear and ensure multiple pages of evidence documents can be uploaded.
    - Allow applications to be shared with health professionals for evidence and signatures to be added.

Application and renewal formats

- Provide greater consistency in the application and renewal requirements and approaches between local authority areas.
- Provide in person and telephone application/renewal options and support in all local authority areas.
- Provide more options for alternative formats, including paper forms, telephone support, large print, easy read and audio options.

Application and renewal process for disabled cardholders

- Remove expiry dates and renewals for those with lifelong conditions.
- Issue reminder letters/emails ahead of renewals, alerting cardholders to the need to renew it and providing information on how to do this.
- Make it easier to prove eligibility, for example using data sharing protocols that allow automatic checks with Social Security Scotland and ensure disabled applicants have the relevant information to understand which application method may suit them best. Local authorities currently can access Social Security Scotland’s data sharing portal, meaning details can be

confirmed if an applicant provides outdated or incomplete information, however getyournec do not have access.

- Align expiry dates with disability benefit review/expiry dates, and/or reconsider the timescale for valid dates on documentation/evidence as letters from Social Security Scotland/Department for Work and Pensions, or from medical professionals, are not always received in line with current requirements or NEC renewal periods.
- Expand the range of ID documentation which is allowed - requiring driving licenses or passports was considered too limited. Currently, the following forms of photo ID are accepted: passport, driving license, pass accredited ID, E-Visa, and when these are not available NECPO have a photo referee system.
- Save basic information and evidence so it does not need to be sourced and entered at each renewal, while allowing for updates and changes to be made, as well the provision of more recent evidence regarding eligibility.
- Expand eligibility for sight impaired companion cards beyond those registered blind to support those with other sight impairments, particularly severe impairments and those with limited vision in poor light.

Coverage

Respondents made several requests across the evaluation feedback to expand the Scheme. In particular, they recommended including free travel on all trains, as well as on the Glasgow subway and Edinburgh trams. It was argued that free travel on these modes of public transport should be allowed for all cardholders, and not restricted to certain card types or local arrangements (as was currently the case). It was argued that consistent arrangements were required to provide greater equity.

A few cardholders also wanted to see the Scheme expanded in other ways. This included providing a discount/subsidy for taxis, extending the Scheme to include night buses and UK-wide bus travel, and extending eligibility for the Scheme to carers and those working in social care. A small number of survey respondents and community transport operators also called for the Scheme to include S19 services, such as door-to-door, dial-a-ride, and on demand services.

Clarity and consistency of additional uses

One key suggestion from cardholders and support organisations was to provide clearer information about any additional uses or benefits of the NEC. This included details about any discounts that are available on other public transport modes, any other locally available benefits or support, and information around the use of the NEC as official/government issued ID and what this can be used for.

There were also calls for these additional uses/benefits to be consistent across the country, so that all cardholders are able to access the same benefits and discounts, regardless of the type of card they have or where they live. It was felt this would provide clarity and equity for cardholders, and would help service providers and support services provide clear and consistent advice.

It should be noted, however, that additional uses and benefits are determined and provided by each respective local authority. Therefore, any efforts to provide consistency would require a co-ordinated approach and support from all local authorities.

NEC format

There were some cardholders (both in survey and focus group feedback) that desired an option for a digital version of the NEC, for example, one that could be held on smartphones. This was considered sensible and compatible with current technology and other ticketing systems. A few respondents felt this would be more convenient, and would provide a backup should they ever lose the physical card:

> *"The bus pass could be digital. All my other cards are digital in my phone and occasionally I forget the pass as it's not in my phone like all my other cards. I would like it to be in my digital Apple Wallet."*
> *Disabled cardholder - survey respondent*

A few also suggested that a digital option, perhaps through an app or online account would be helpful. It was suggested that this could allow paperless communication; support the provision of updated information or change of circumstance; provide alerts about expiry dates/renewals; and provide a platform for applications, replacements and renewals. In all cases, however, cardholders felt that any digital version should be in addition to, rather than as a replacement of, the physical card.

One bus operator, however, noted difficulties with moving to a more digital system. They highlighted that this would require uninterrupted internet connections on buses and in their offices to facilitate this, which was not practical or possible. Transport Scotland also noted that it was currently only possible for people to have access to the Scheme in one format.

A few sight impaired cardholders also asked if a distinguishing/tactile feature could be added to the NEC. This would help to make it easily recognisable among their other cards, and could also help them to know which side of the card needed to be presented to drivers/conductors.

In addition, a small number of cardholders (across both survey and focus group feedback) suggested that it might be better if the card had more detail about someone's disability. This could discretely alert drivers to their additional needs, to possible communication difficulties, and to know what kind of support or assistance to offer.

Eligibility criteria

A small number of survey respondents and focus group participants suggested that the age limit for the over 60 cardholders could perhaps be reconsidered. It was suggested that provision of free bus travel under the Scheme should either move in line with the state pension age (i.e. stay within five years of retirement), be the same as the state retirement age, or that it should be provided as a means tested benefit. These respondents were concerned about the overall cost of the Scheme and whether such a universal benefit was a good/appropriate use of tax payers' money. There was a sense that the Scheme should not be used to support those in employment, or those with higher incomes:

> *"As a whole it is probably an expensive scheme! Maybe the age to qualify for a free bus pass should be raised to pension age as a lot of 60 year olds are still in full time employment and therefore can afford the bus fares." Over 60 cardholder - survey respondent*

It should be stressed, however, that this was very much a minority view and most welcomed the financial inclusivity and benefits that the Scheme afforded.

Operator reimbursement system

A few bus operators suggested changes related to reimbursement. Specifically, there were calls for the reimbursement rate to be increased, and for more long term certainty to be provided in this respect:

> *"We need to get away from this cliff edge every year where we don't know from one year to the next…how much we're going to get paid. It creates a huge amount of uncertainty which makes it pretty difficult to invest in our services…" Commercial bus operator*

Two operators also felt that the reimbursement calculation should reflect more broadly the types of journeys made and range of ticket options used by commercial passengers. One suggestion was to base the reimbursement rate on the average commercial fare/average commercial journey price. Another suggestion was to separate out the long distance coach industry from local services and create different reimbursement models (as it was felt there was considerable disparity in fare structures between the two sectors).

Driver training

Across the survey feedback and different focus groups, it was suggested that additional driver training was needed to improve their awareness and understanding of eligibility for the various disabled cards. It was felt this would help avoid unnecessary questioning or challenging of cardholders, rudeness, perceptions of judgement, and the lack of patience shown by some drivers. In addition, it was suggested that more general disabilities/equalities training was also needed. Operators, however, noted that training was already provided to drivers in this respect.

Others suggested that drivers should be trained to, or have more authority to, ensure that disabled and accessible seating always remained free for those that needed it most, and to assist them to be safely seated.

One support organisation highlighted specific training for bus companies in relation to sight impairment. They noted ongoing work with operators in Glasgow and Edinburgh to improve accessibility for sight impaired passengers. This work involved Sight Loss Councils (SLCs), which is an initiative supported by Thomas Pocklington Trust (TPT), Visibility Scotland, and Sight Scotland.

Discussion and conclusion

Meeting the expected outcomes

As outlined above, the Scheme had a number of expected outcomes. Each of these are considered in turn below alongside the evaluation findings to determine the extent to which they have been met.

Reduction in carbon emissions

It was expected that the Scheme would result in an **increase in bus usage** (both for new and existing journeys), along with **modal shift from car to bus** and a **reduction in car kilometres**. This would, in turn, be expected to result in a reduction of carbon emissions.

While the evaluation findings did not consider carbon emissions directly, feedback from cardholders provided strong evidence of both an increase in bus use and a reduction in car (and taxi) usage. Cardholders reported travelling by bus more frequently for both essential and existing journeys, as well as for new journeys. Conversely, many indicated that they travelled by car less often. Even where cardholders still had access to private vehicles, it was evident that many opted to use the bus due to cost, convenience and to reduce stress compared to driving.

Improved health, mental health and wellbeing

A key aim of the Scheme was to improve the physical health, mental health and wellbeing of older and disabled people. Cardholders overwhelmingly agreed that the Scheme supported this aim, at least where access to high quality, reliable and frequent bus services was provided.

Improved confidence, freedom and independence: Many reported that the Scheme gave them more freedom and independence. They indicated that it ensured they could travel as and when they needed to, and removed the feeling of being a burden to others, either financially or practically. Many noted that they had travelled further afield, to places and areas they would not have gone to otherwise, with some exploring across Scotland. Similarly, many highlighted improvements in their confidence for travelling. Cardholders were less nervous to travel due to the removal of cost barriers. There was also evidence that the companion card supported disabled children and young people to become more confident and independent in their travel as they got older.

Reduction in social isolation: There was strong evidence that the Scheme helped to reduce social isolation among cardholders. Many suggested that they made trips they would not otherwise have made, and indicated that they would not get out as often if they did not have their NEC. Many used the Scheme to allow them to socialise and to see family and friends. Even where the purpose of the journey was not a social activity, some also noted that they would meet and speak to other passengers on board the bus. This social aspect of the Scheme was considered important in combating loneliness and isolation for some cardholders.

There was also evidence of more direct positive impacts on people’s mental health, with a few cardholders highlighting how the Scheme had helped them to get out and join clubs following bereavements and disability diagnoses. This allowed them to access support, to connect with other people, and to build their confidence of travelling in their new/changing situation. The free bus travel provided by the Scheme removed a barrier or ‘excuse’ not to go out.

Increased activity levels (walking more/more active travel): There was mixed feedback regarding the impact on physical activity. Many survey respondents felt there had been little change in how much they walked, while there was also evidence that some walked less and others walked more. However, many also said they were more active because of the Scheme, and there was evidence that some used free bus travel to support active pursuits, such as going to the gym, to take part in sports, accessing parks or the countryside for walks, etc.

Reducing inequalities

Reduction in travel costs/reduced household spend on transport: Most survey respondents indicated that the Scheme had saved them money, and many said they would choose to take the bus because it was free. While the amounts saved varied, most cardholders were appreciative of the fact the Scheme allowed free bus travel. Respondents noted that the free nature of the card meant that the financial barrier to travel had been removed. A few respondents, typically on fixed/low incomes also suggested that reducing travel costs/spend also helped them manage their household finances, helping them to better afford other essentials.

Access to services, including health: One of the main uses of the Scheme was to access services, including shopping and personal business, health and medical services. For many, the Scheme was a vital resource to allow them to make these journeys. Without free bus travel, several noted that they would not be able to attend medical appointments, would either shop less often and have to carry heavier bags home, or would have to rely more on online deliveries. Taxis would also be used more, incurring higher costs.

Access to social and leisure activities: Another key use of the Scheme was for social and leisure activities. Many used free bus travel to socialise, either travelling with friends and family or to meet them, while several also used it to support hobbies or to attend sports activities/clubs. A wide range of different social and leisure activities were accessed. Some survey and focus group respondents also noted that they used the Scheme to travel significant distances to stay in touch with/meet friends and family, which they would not do otherwise.

Increase in domestic tourism (day trips and holidays): There was evidence that the Scheme was used to participate in domestic tourism, including day trips, weekends away and longer holidays around Scotland. The ability to use the NEC on long-distance services and multiple modes (e.g. ferries and trains, where applicable) was welcomed, as this allowed cardholders to travel further afield.

Access to education, work and volunteering: There was evidence that the Scheme had improved access to work, volunteering and education for some cardholders. There were reports of cardholders finding new jobs, accessing part-time work, staying in work longer, accessing and maintaining volunteering opportunities, accessing university, and parents/grandparents being able to take children to school because of the Scheme.

Feeling safe using the bus: The evaluation provided mixed results with regard to whether cardholders felt safe using the bus. While most indicated that they did feel safe travelling by bus, there were also some that discussed feeling unsafe due to anti-social behaviour and the number of Young Persons' Scheme cardholders now using buses. Issues around feeling unsafe at bus stops or interchanges that were poorly maintained or poorly lit were also reported in some cases.

Other findings linked to inequalities: While there was little difference in the journey purposes between those who travelled using their NEC, and those who travelled using different modes, there was however, a difference in how frequently these two groups travelled for their main journey purpose. Those who used other modes tended to travel slightly more frequently compared to those who used their NEC. However, many cardholders said that the card allowed and encouraged them to travel more often than they would do without it.

Also, it would appear that proportionately fewer people in more deprived areas hold the over 60 card compared to those in less deprived areas. As such, the benefits may not be achieved equitably.

Conclusion

Overall, the evaluation suggests that the Scheme is highly successful and valued. The results show that the Scheme is largely meeting each of the objectives, driving modal shift and contributing to a reduction in carbon emissions, improving physical health, mental health and wellbeing for cardholders, and tackling inequalities. In general, it operates smoothly for both bus operators and cardholders, although a few areas were flagged to deliver direct improvements to the Scheme. The findings show that the Scheme is well used, with most survey respondents using it with some regularity. It is also used for a wide range of purposes and provides a variety of benefits, including those directly felt by cardholders, as well as for the environment, communities and the economy.

There were differences in some results, largely by card type and the extent to which households were experiencing financial difficulties or not. In particular, disabled cardholders found it more difficult to get information about the Scheme, and the application and renewal process was more difficult for this group. Disabled cardholders were more likely to experience difficulties with physical access to buses, and were more concerned about safety and anti-social behaviour. However, they also appeared to experience the benefits to a greater extent, for example saving larger amounts of money, improvements in access to services, and improvements across the health and wellbeing measures.

The Scheme was described as excellent by those who use it, and as a ‘life-line’ for many. However, for those with no access to services, or where services did not run when or as often as needed, where direct routes were lacking or services were unreliable or slow, or presented accessibility challenges, the value of the Scheme was severely diminished. Better service provision and more accessible services would be needed in some areas, or expansion of the Scheme to support wider travel options (such as discounts on taxis, the inclusion of S19 door-to-door community transport services, etc.), in order to ensure greater equity in older and disabled people’s ability to access, use and benefit from the Scheme.

Appendix A: Sample Profile

Survey Respondents

In total, **2,502** cardholders responded to the survey. This included 2,484 people who completed the online survey, plus 18 people who completed a large print paper version.

Of those who responded to the survey, most held a free bus pass themselves (n=2,384, 95%), 3% (n=72) were responding on behalf of someone aged 16+ who had a free bus pass, and 2% (n=46) were a parent/carer of a child under the age of 16 who had a free bus pass.

Almost all survey respondents lived in Scotland full-time (n=2,480, 99%), and only 1% (n=22) lived in Scotland on a part-time basis.

Table 27 Type of Card held

Response	Number	Percentage
Over 60	1,590	64%
Disabled	286	11%
Disabled plus companion (+1)	547	22%
Sight impaired	22	1%
Sight impaired plus companion (+1)	57	2%
Total	**2,502**	**100%**

Table 28 How long have you held your free bus pass for?

Response	Number	Percentage
Less than 2 years	613	25%
2 - 5 years	761	31%
6 -10 years	549	22%
Over 10 years	558	22%
Total	**2,481**	**100%**

Note: 21 respondents did not answer this question.

Table 29 Sex

Sex	Number	Percentage
Female	1,293	54%
Male	1,105	46%
Total	**2,398**	**100%**

Note: 104 respondents did not disclose their sex.

Table 30 Age group

Age group	Number	Percentage
Under 16	44	2%
16-19	43	2%
20-29	82	3%
30-39	128	5%
40-49	155	6%
50-59	241	10%
60-69	1,100	45%
70-79	523	22%
80+	118	5%
Total	**2,434**	**100%**

Note: 68 respondents did not disclose their age.

Table 31 Do you have any physical or mental health conditions or illnesses lasting or expected to last 12 months or more?

Response	Number	Percentage
Yes	1,424	59%
No	958	40%
Don’t know	28	1%
Total	**2,410**	**100%**

Note: 92 respondents did not disclose this.

Table 32 Does your condition, illness or disability/do any of your conditions, illnesses or disabilities reduce your ability to carry out day-to-day activities?

Response	Number	Percentage
Yes, a lot	674	49%
Yes, a little	584	42%
Not at all	122	9%
Total	**1,380**	**100%**

Note: 44 respondents did not disclose this.

Table 33 Ethnic group

Ethnic group	Number	Percentage
White (including Gypsy, Traveller, Roma, Showman/woman)	2,269	97%
Mixed or multiple ethnic groups	15	1%
Asian, Scottish Asian or British Asian	29	1%
African, Scottish African or British African	4	<1%
Caribbean or Black	5	<1%
Other ethnic group	10	<1%
Total	**2,332**	**100%**

Note: 170 respondents did not disclose their ethnic group.

Due to small sample sizes, the white ethnic group is the only disaggregated group presented below.

Table 34 White ethnic group

White ethnic group	Number	Percentage
Scottish	1,790	80%
Other British	328	15%
Irish	37	1%
Other (including Polish, Gypsy/Traveller, Roma, and Other)	85	4%
Total	**2,240**	**100%**

Note: 29 respondents did not disclose their ethnic group.

Note: Groups with small numbers have been combined with 'other' for anonymity.

Table 35 What is the first or main language spoken in your household?

Main language	Number	Percentage
English	2,361	97%
Other	63	3%
Total	**2,424**	**100%**

Note: 78 respondents did not disclose this.

Table 36 Sexual orientation

Sexual orientation	Number	Percentage
Straight/heterosexual	1,905	92%
Gay or lesbian	91	4%
Bisexual	68	3%
Other sexual orientation	17	1%
Total	**2,081**	**100%**

Note: 421 respondents did not disclose this.

Note: Those responding on behalf of someone else (either children or those aged 16+) were not asked this question.

Table 37 During the time you have had your free bus pass, have you (at any point) had access to a private vehicle?

Access to private vehicle	Number	Percentage
Yes, currently have access	1,670	69%
Yes, previously had access but not now	169	7%
No, neither currently nor previously	571	24%
Total	**2,410**	**100%**

Note: 92 respondents did not disclose this.

Table 38 Employment status

Employment status	Number	Percentage
In education (full or part time, including school, further or higher education)	116	5%
Doing an apprenticeship or other training programme	5	<1%
In work (full or part time, including self-employment)	629	25%
I volunteer (i.e. unpaid work)	67	3%
Unemployed - seeking work	31	1%
Unemployed - not seeking work	115	5%
Not in education/training/work due to health condition	149	6%
Looking after home/family	19	1%
Carer	31	1%
Retired	1,292	52%
Other	21	1%
Total	**2,475**	**100%**

Note: 27 respondents did not answer the question.

Of those that said ‘other’ most were disabled but were unclear about whether they were looking for work or not, or they indicated that a number of categories were relevant to them without identifying which would be their main status.

Table 39 Employment status by card type

Employment status	Over 60 Card Number	Over 60 Card Percentage	Disabled Card Number	Disabled Card Percentage
In education (full or part time, including school, further or higher education)	6	<1%	110	12%
Doing an apprenticeship or other training programme	1	<1%	4	<1%
In work (full or part time, including self-employment)	364	23%	265	30%
I volunteer (i.e. unpaid work)	39	2%	28	3%
Unemployed - seeking work	11	1%	20	2%
Unemployed - not seeking work	6	<1%	109	12%
Not in education/training/work due to health condition	4	<1%	145	16%
Looking after home/family	10	1%	9	1%
Carer	14	1%	17	2%
Retired	1,117	71%	175	20%
Other	7	<1%	14	2%
Total	**1,579**	**100%**	**896**	**100%**

Note: 11 respondents with an over 60 card and 16 respondents with a disabled card did not answer the question.

Table 40 How respondents are managing financially these days

Managing financially	Number	Percentage
Manage very well	432	19%
Manage quite well	590	25%
Get by alright	944	41%
Don't manage very well	129	6%
Have some financial difficulties	180	8%
Are in deep financial trouble	31	1%
Don't know	8	<1%
Total	**2,314**	**100%**

Note: 188 respondents did not answer this question.

Table 41 Local authority area respondents live in

Local authority	Number	Percentage
Aberdeen City Council	79	3%
Aberdeenshire Council	85	4%
Angus Council	43	2%
Argyll & Bute Council	64	3%
City of Edinburgh Council	278	12%
Clackmannanshire Council	27	1%
Comhairle nan Eilean Siar (Western Isles)	12	<1%
Dumfries and Galloway Council	45	2%
Dundee City Council	69	3%
East Ayrshire Council	64	3%
East Dunbartonshire Council	47	2%
East Lothian Council	81	4%
East Renfrewshire Council	48	2%
Falkirk Council	47	2%
Fife Council	118	5%
Glasgow City Council	198	9%
Highland Council	98	4%
Inverclyde Council	33	1%

Local authority	Number	Percentage
Midlothian Council	82	4%
Moray Council	37	2%
North Ayrshire Council	13	1%
North Lanarkshire Council	64	3%
Orkney Islands Council	8	<1%
Perth and Kinross Council	62	3%
Renfrewshire Council	81	4%
Scottish Borders Council	31	1%
Shetland Islands Council	16	1%
Stirling Council	91	4%
South Ayrshire Council	51	2%
South Lanarkshire Council	240	10%
West Dunbartonshire Council	27	1%
West Lothian Council	53	2%
Total	**2,292**	**100%**

Note: 210 respondents did not answer this question.

Table 42 Urban/rural area (self-reported)

Location	Number	Percentage
In a city	793	32%
In a town	976	40%
In a village	499	20%
In the countryside	158	6%
On an island	52	2%
Total	**2,478**	**100%**

Note: 24 respondents did not answer this question.

Note: For consistency, all respondents living in island local authorities (i.e. Comhairle nan Eilean Siar, Orkney and Shetland) that had indicated they lived in towns, villages and the countryside were recoded to living on an island.

Focus groups

Overall, **eight focus groups** were conducted. The groups were structured as follows:

- Two in person focus groups were held with cardholders living in rural areas (one was an informal discussion group interview which was shorter to fit within the group's planned meeting. As such, some questions were more general in nature and not all questions were covered, however, all of the main topics were discussed).
- Two focus groups were held with over 60 cardholders, one was conducted in person and the other online.
- Two focus groups were held with disabled cardholders, one focused on sight impaired cardholders and the other focused on those with the disabled card. One group was conducted in person and the other online.
- Two dedicated focus groups were held with infrequent users, both were conducted online.

In addition to the focus groups, two individuals took part in an interview for accessibility reasons. One deafblind adult preferred to speak by telephone, and one disabled adult participated in person as they were unable to participate at the time of the scheduled group. The focus group topic guide was used in these interviews to ensure questions were consistent and that the feedback could be collated.

Across all sessions/discussions, a total of **65 individuals** took part. This included:

- 35 over 60 cardholders
- 10 disabled cardholders
- four disabled plus companion (+1) cardholders
- five sight impaired cardholders
- 11 sight impaired plus companion (+1) cardholders

It should be noted that, while some groups had been established to focus on particular demographics, all groups tended to include a mix of different cardholder types, including over 60, disabled and/or sight impaired cardholders. There was also overlap between the demographics and card type, e.g. some over 60 cardholders also had disabilities, while some disabled cardholders were also aged 60 and over.

Bus operator interviews

In total, **six bus operators** provided feedback. Five participated in telephone or online interviews, while one provided written feedback. Participants included:

- one rural/regional commercial operator
- one city/urban commercial operator
- one inter-city/long distance commercial operator
- one rural/regional community transport operator
- one city/urban community transport operator
- one rural community transport operator moving from a S22 to S19 permit model, i.e. although currently eligible to accept the NEC they were changing to a model that was not included within the Scheme

The research also sought to include feedback from a small-medium sized commercial operator, but could not identify suitable operators who had availability within the research timescale. As such, this represents a gap in the findings.

Appendix B: Cardholder and journey data

Data sources Transport Scotland and NECPO.

Number of cardholders

Figure 4 Number of cardholders by age (as at 30 September 2025)

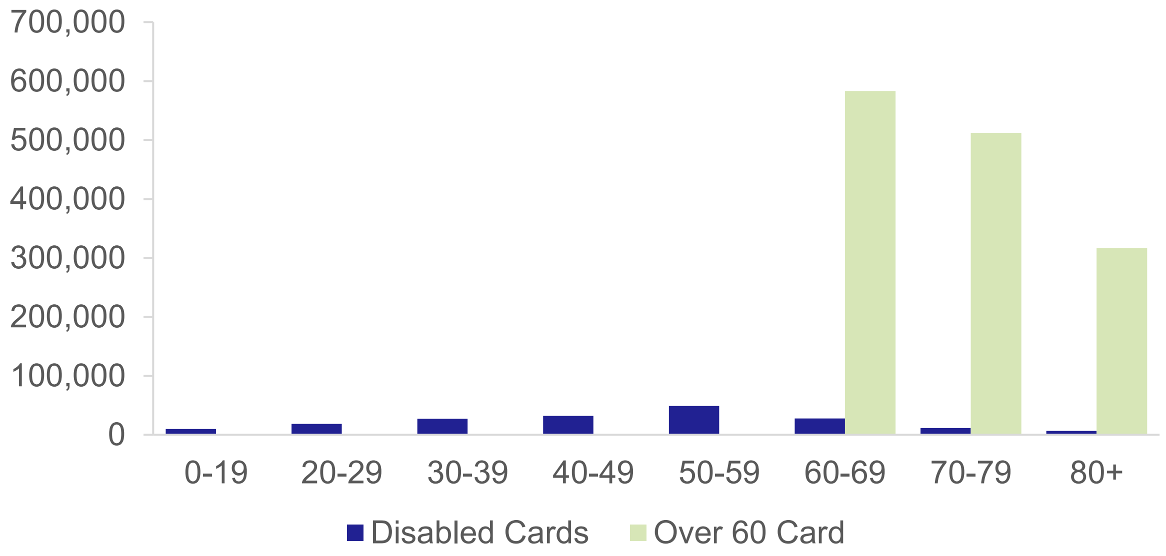


Figure 5 Number of cardholders by sex (as at 30 September 2025)

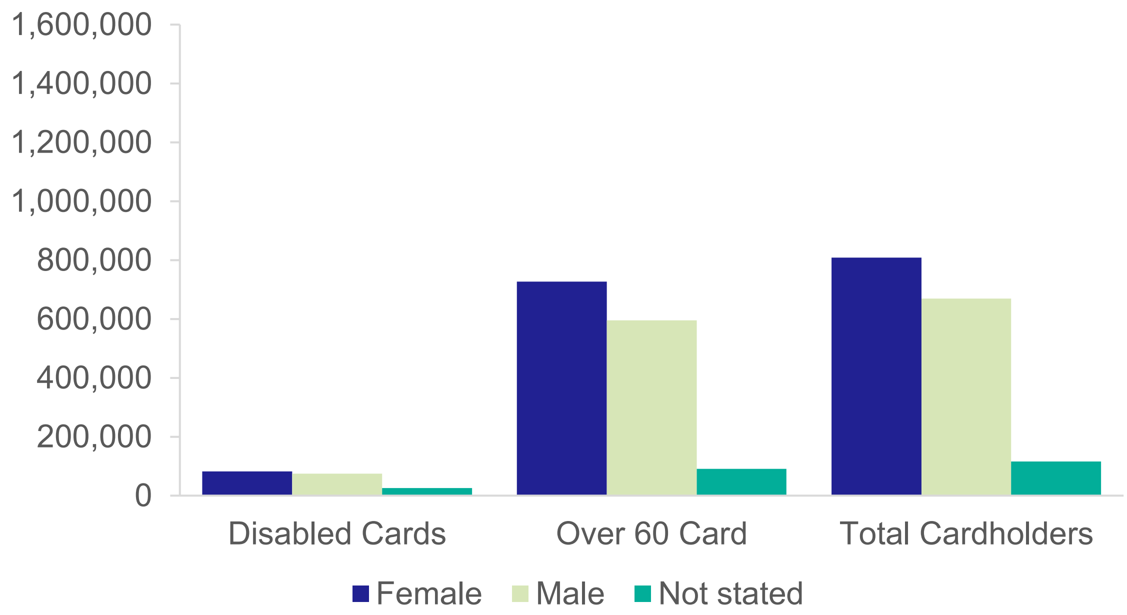


Figure 6 Number of cardholders by local authority (as at 30 September 2025)

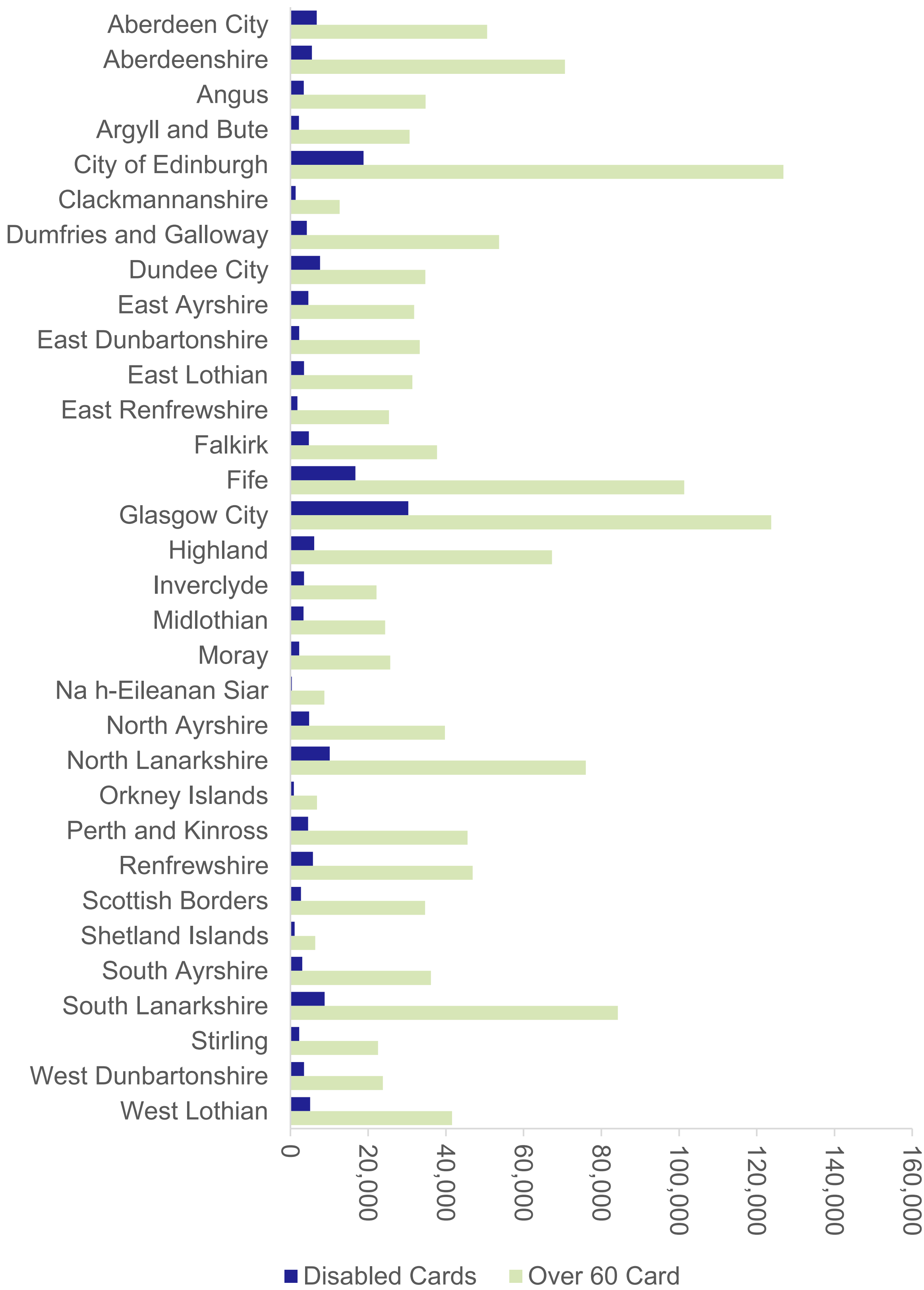


Table 43 Cardholders by Urban/Rural Classification (as at 1 August 2025)

Urban/rural classification	Disabled cardholders	Over 60 cardholders	Total number of cardholders	Uptake of over 60 card
1 - Large Urban Areas	79,035	467,761	546,796	100%
2 - Other Urban Areas	63,457	471,884	535,341	93%
3 - Accessible Small Towns	13,087	132,175	145,262	94%
4 - Remote Small Towns	2,516	24,002	26,518	91%
5 - Very Remote Small Towns	2,415	19,381	21,796	94%
6 - Accessible Rural Areas	13,207	182,902	196,109	92%
7 - Remote Rural Areas	2,750	47,857	50,607	92%
8 - Very Remote Rural Areas	3,139	52,023	55,162	94%
Total	**179,606**	**1,397,985**	**1,577,591**	**95%**

Note: Uptake is only possible to calculate for the over 60 card as population data is available, there is not reliable equivalent population data for eligible disabled people. Population data source: NRS

Number of journeys made

Figure 7 Number of journeys by age (April 2024-March 2025)

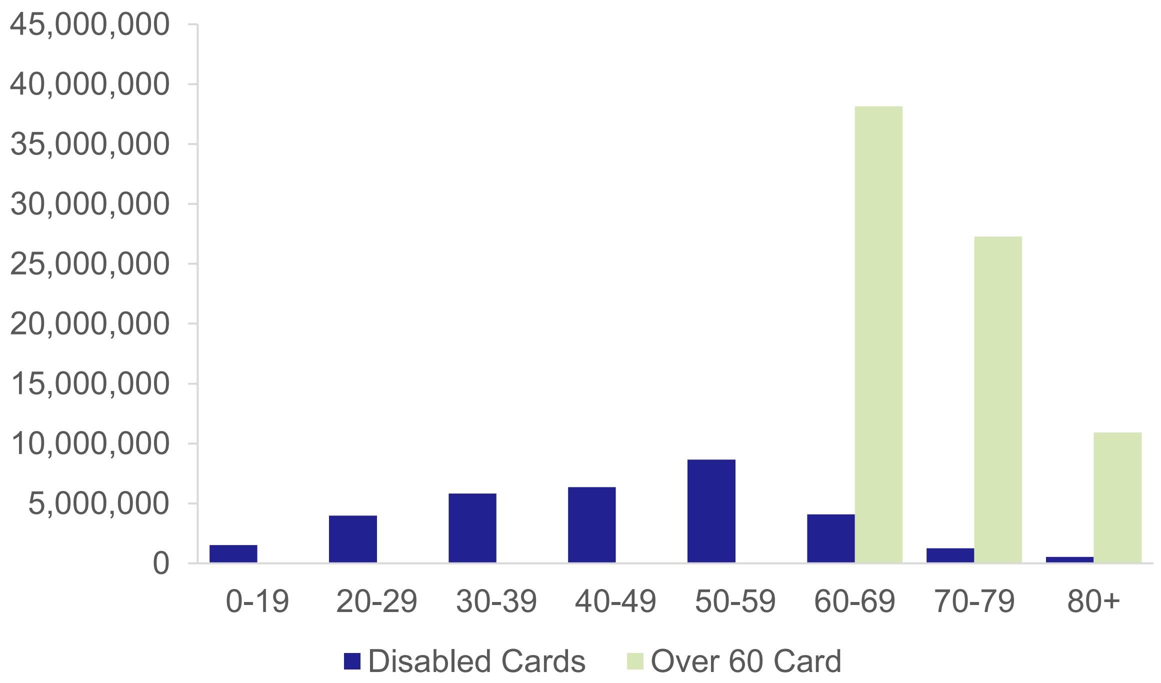


Figure 8 Number of journeys by sex (April 2024-March 2025)

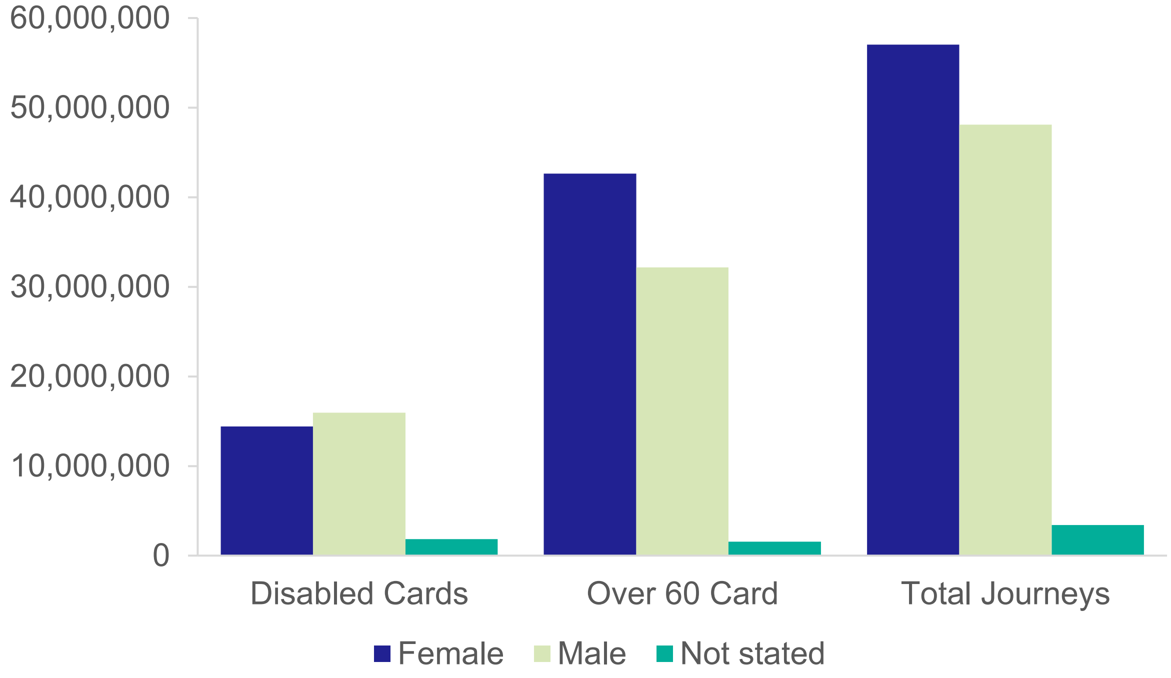


Figure 9 Number of journeys by local authority where the card was registered (April 2024-March 2025)

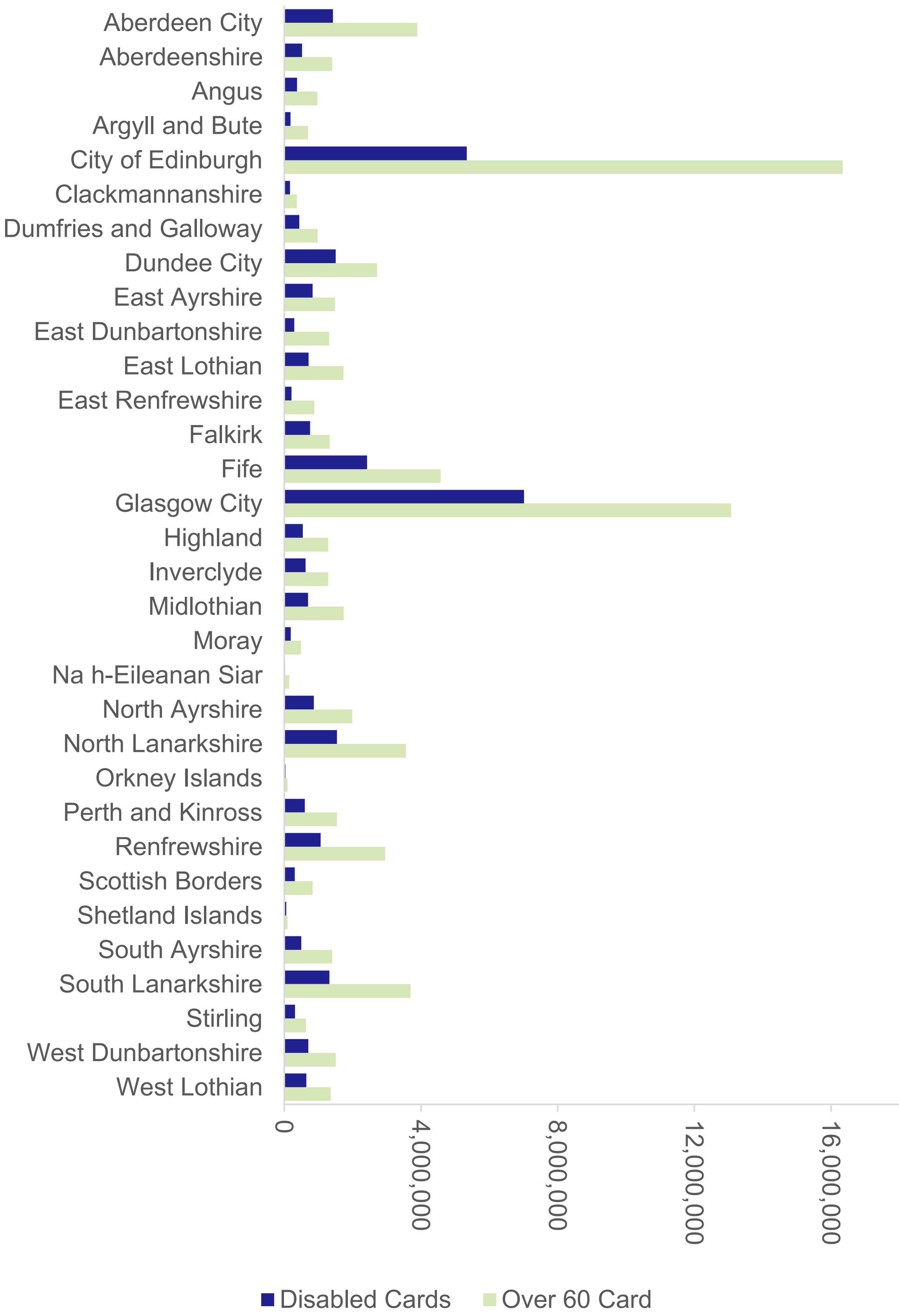


Figure 10 Number of journeys by time of day (April 2024-March 2025)

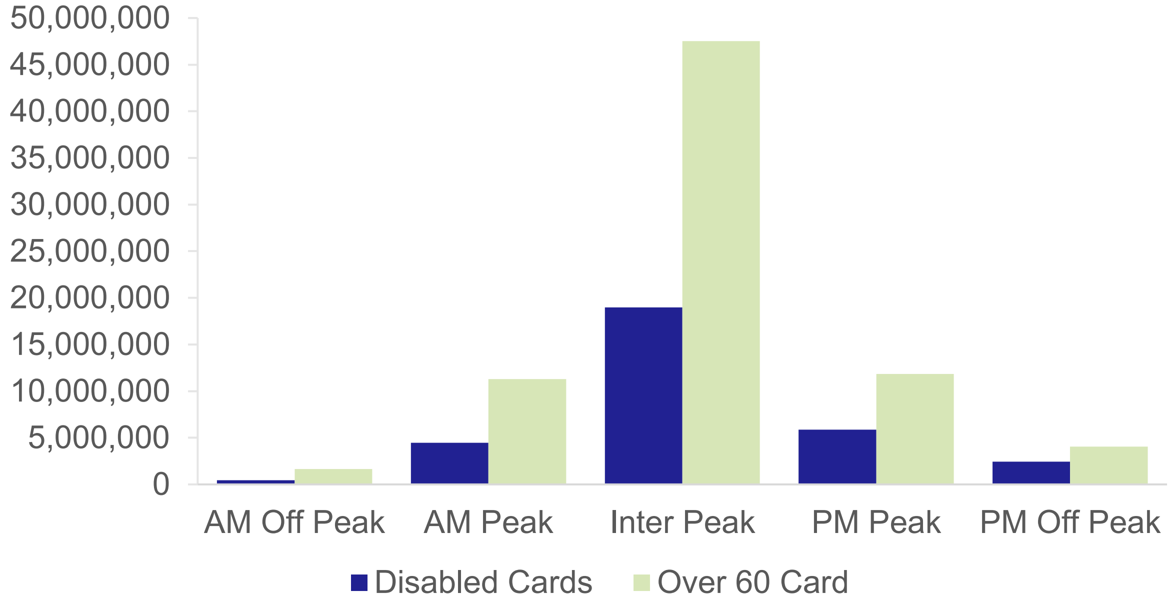
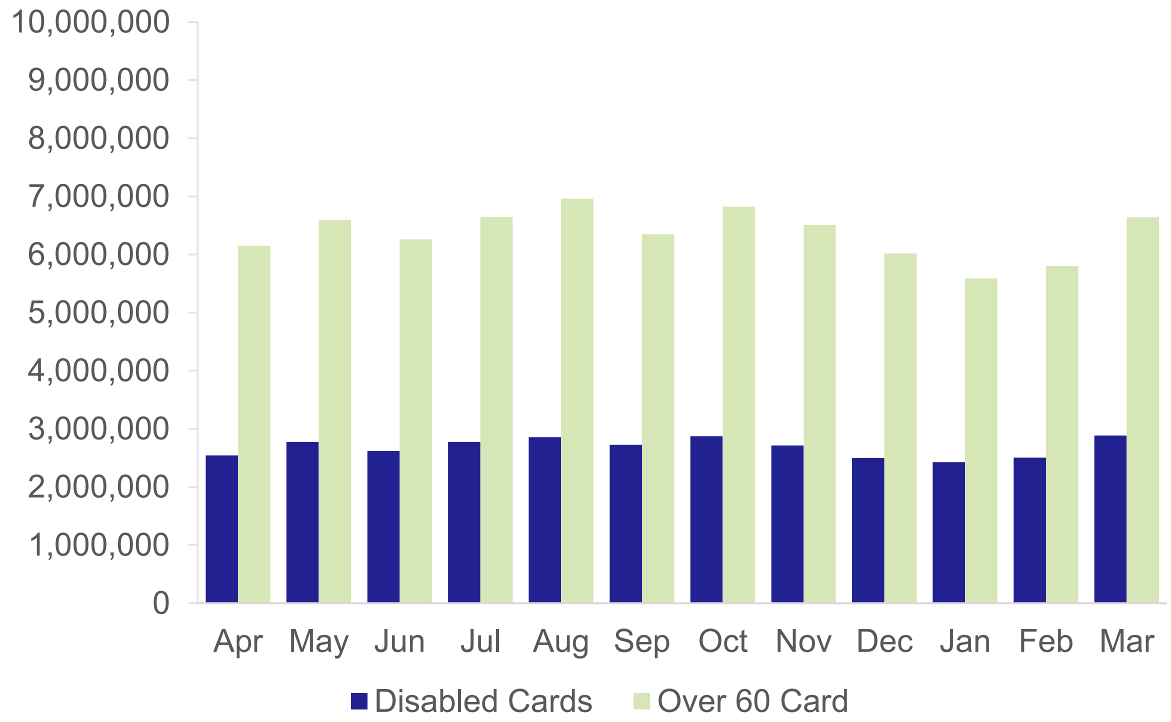


Figure 11 Number of journeys by month (April 2024-March 2025)



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