



Home to School Transport

**How SEND reform can
make services more
sustainable**

February 2026

About

At the County Councils Network (CCN) one of our core objectives as a national representative body is to deliver insights on the policy issues impacting our member councils, the communities they represent, and the wider local government sector.

CCN Analysis seeks to provide the latest data analysis on local economies, service demand, council finances, and the wider public sector landscape, both within county areas and across England.

It contains commentary on what the latest trends mean for national and local policy making, and the implications for public services, businesses, and communities across our 39 member council areas.

CCN Analysis is just one of CCN's regular publications that sits alongside our *Policy in Focus* series, best practice report *County Spotlight* and our range of externally commissioned research publications.

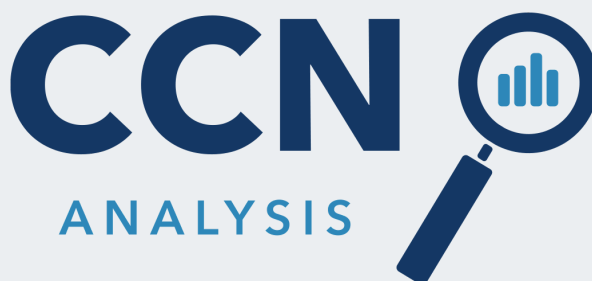
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This report includes data from an updated analysis of the spending pressures facing local government in England conducted by PwC for CCN. Further details are provided in Appendix 2. It is important to note that the analysis on demand projections has been undertaken solely by CCN. Further details on the demand analysis are provided in Appendix 1.

All views expressed in this publication are those of CCN, not PwC.

Contents

OVERVIEW	3
WHAT HAS HAPPENED TO SPENDING ON HOME TO SCHOOL TRANSPORT?	4
HOW HAVE SEND REFORMS DRIVEN SPENDING ON HOME TO SCHOOL TRANSPORT?	5
HOW MANY CHILDREN AND YOUNG PEOPLE ARE USING SEND TRAVEL SERVICES?	8
WHAT ARE THE FORECASTS FOR FUTURE COSTS AND SPENDING?	10
POLICY IMPLICATIONS	13



Over recent years the challenges facing the Special Educational Needs and Disabilities (SEND) system has become one of the biggest issues in public policy. As this crisis has deepened, so too has the spotlight on other areas of local government expenditure that are directly impacted by rising demand for these services.

The most visible of these is home to school transport (HTST), with local authorities providing free school transport for both eligible mainstream pupils and young people with SEND needs.

In 2023, the County Councils Network (CCN) and Isos Partnership report *From Home to the Classroom: Making Travel to School Services Sustainable* outlined in detail the challenges facing home to school transport services. In particular, this report vividly demonstrated that SEND reforms contained in the Children and Families Act 2014 had resulted in an unsustainable rise in demand for, and spending on, school transport.

As the government prepares to publish its long awaited reforms to the SEND system in the forthcoming Schools White Paper, this *CCN Analysis* seeks to provide the latest data insights on the continuing pressures facing these services. Drawing on new projections on future demand and costs, the analysis contained in this report shows that the severe financial challenges for local authorities caused by the SEND system will not cease with the removal of high-needs deficits.

Spending on home to school transport is set to continue to rise unrelentingly without major reform. Therefore, proposals in the Schools White Paper remain crucial to making home to school transport services, and wider local government finance, sustainable.

Key Findings:

- Total spending on SEND home to school transport has risen over 200%, from £645m in 2015/16 to almost £2bn in 2024/25.
- Spending on services has risen dramatically since the introduction of the 2014 reforms due to combination of rising overall demand for SEND support; increasing numbers of pupils placed in special schools; frequent use of individual taxis; all set alongside a fragile provider market and higher inflation.
- Councils transported an estimated 206,000 children and young people with SEND to school last year – a record high. If current trends continue, this will rise to 311,000 by 2030/31, an average increase of 17,500 pupils a year. Half of these young people are transported in rural and county areas.
- As a result, SEND HTST costs are projected to rise from £2bn last year to £3.4bn by 2030/31. This is a five fold increase compared to what they were spending in 2015, the first year SEND reforms increased eligibility. County areas are at the sharp end of this: representing half of costs.
- SEND pupils using home to school transport now cost councils almost £10,000 on average to get to school – and spending on this cohort is projected to become more costly. Last year councils spent £9,481 on average per SEND pupil and this could rise to almost £11,000 per pupil in 2030/31 because of fuel costs, inflation and some pupils travelling in single-occupancy vehicles.
- Rising SEND demand is squeezing transport provision for mainstream pupils. In 2015/16, councils on average spent 64% of their entire school transport budgets on SEND school transport, which is projected to rise to 85% by 2030/31. Faced with mounting costs, a recent CCN survey found that three quarters of councils plan to tighten eligibility for mainstream school transport over the next three years.

WHAT HAS HAPPENED TO SPENDING ON HOME TO SCHOOL TRANSPORT?

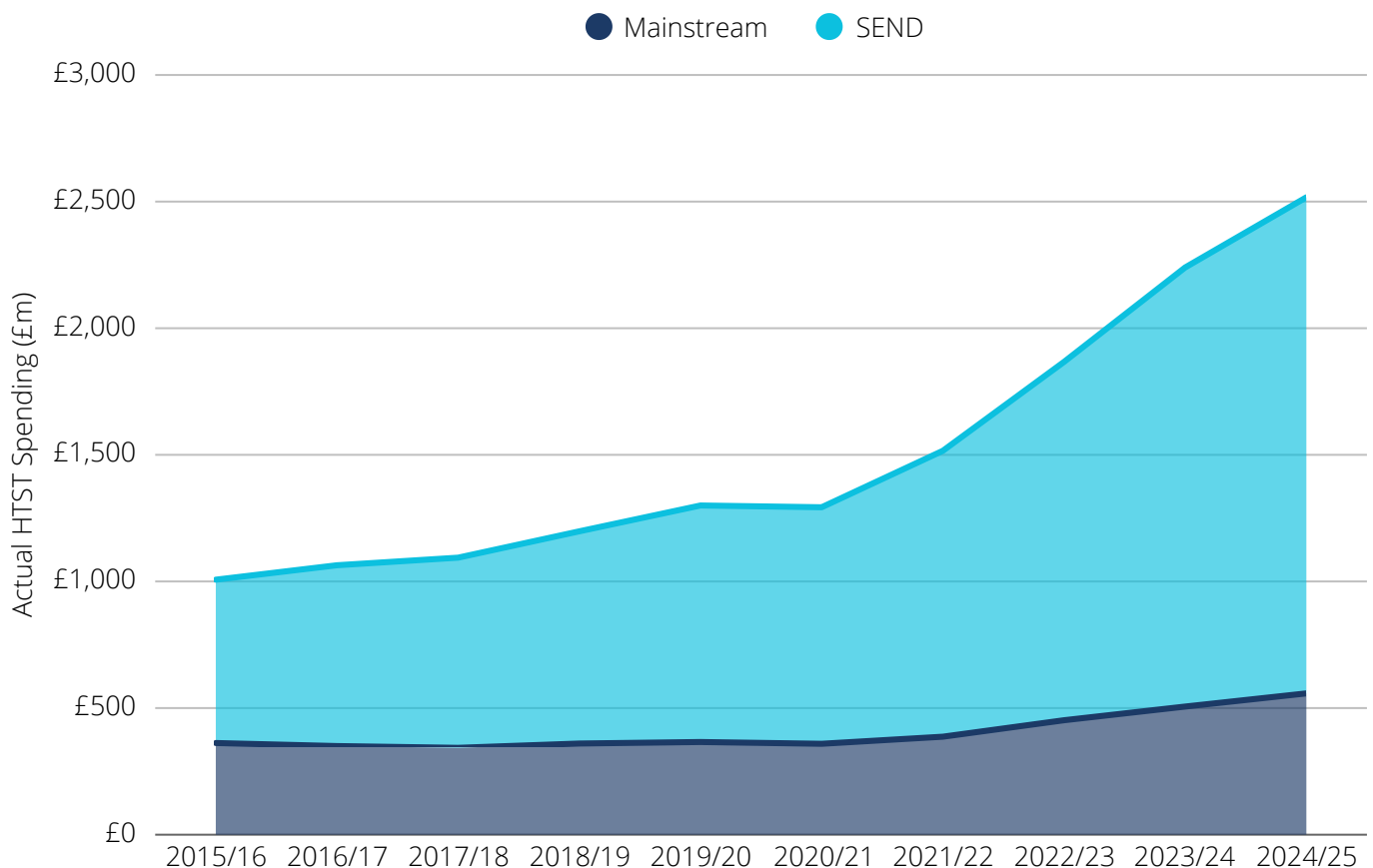
Before exploring how demand and spending on home to school transport may evolve over the coming years, it is important to demonstrate how expenditure by councils has developed over the previous decade.

Published data shows that in 2015/16 councils in England were spending just over £1bn on HTST services. But over the following years, it is clear that the introduction of SEND reforms in 2014 has dramatically increased spending.

Total spending on SEND home to school transport has risen over 200%, from £645m in 2015/16 to almost £2bn in 2024/25. Pre-16 SEND transport expenditure is the principal reason, rising from £570m to £1.7bn over the same period.

At the same time, there has only been modest growth in mainstream home to school transport expenditure, rising from £343m in 2015/16 to £558m 2024/25. This significantly slower growth despite the impact of inflation and other market pressures.

Figure 1 - National Expenditure on Home to School Transport (all LAs), 2015/16 to 2024/25. DfE, 2025.



HOW HAVE SEND REFORMS DRIVEN SPENDING ON HOME TO SCHOOL TRANSPORT?

It is clear from the spending data presented above that it is growing pressures in the SEND system that are the principal reason for rising expenditure on school travel services.

Spending on SEND HTST services has risen sharply since the introduction of reforms in the Children and Families Act 2014 due to a combination of rising overall demand for SEND support; increasing numbers of pupils in special schools; frequent use of individual taxis; all set alongside a fragile provider market and higher inflation.

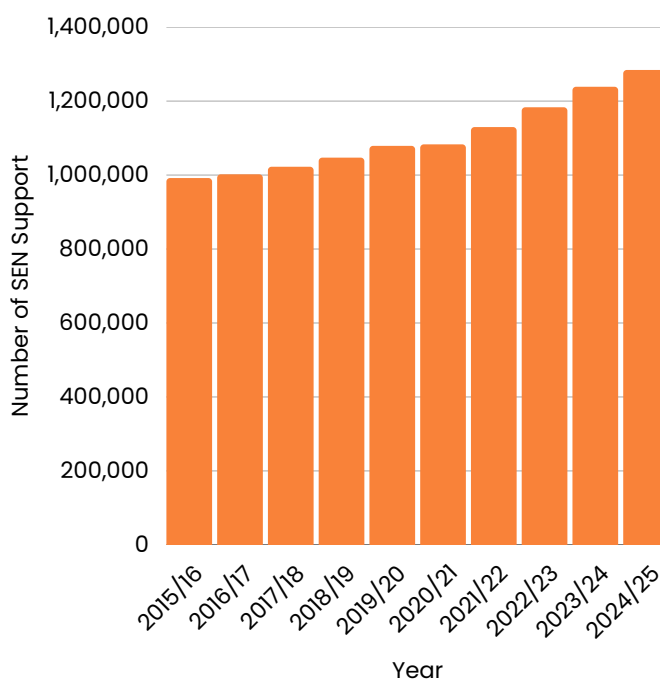
Embedded challenges within the wider SEND system is giving rise to more and more children and young people with SEND support

As the CCN concluded in its October 2025 research assessing the current challenges within the SEND system,¹ there are more young people assessed as having SEND needs than ever before. As with the wider pressures facing the system, it is this growth in need that has translated to a rapid increase in SEND HTST service users.

Overall, Figure 2 shows that the proportion of the school population with identified SEND has increased from 18.4% last year to 19.6% this year. There are now at least 675,000 more children and young people with identified SEND in England than there were in 2015/16.

But the stand-out feature of the SEND system, since the reforms of 2014, has been the very rapid increase in the number of children and young people with Education Health and Care Plans (EHCPs). Figure 3 below shows that nationally the numbers of pupils on EHCPs has grown by 165% since 2015. EHCPs increased by 11.5%

Figure 2 – SEN Support in England's schools 2015/16 to 2024/25. DfE 2025.



between 2023/24 and 2024/25, which is the largest single year increase.

Whilst for mainstream school transport eligibility is determined by distance and walkability to a pupils' closest school, the criteria is different for SEND pupils.

If a young person with SEND is in receipt of an EHCP, this may stipulate they are legally entitled to free school transport to the school named within the plan. However, the eligibility of children and young people with SEND for HTST is not dependent on whether the child has an EHCP.

Some children with SEND, but without an EHCP, will be eligible for transport. Conversely some children with an EHCP will not. Similarly, attendance at a special school does not automatically mean that a child or young person is eligible for home to school transport.

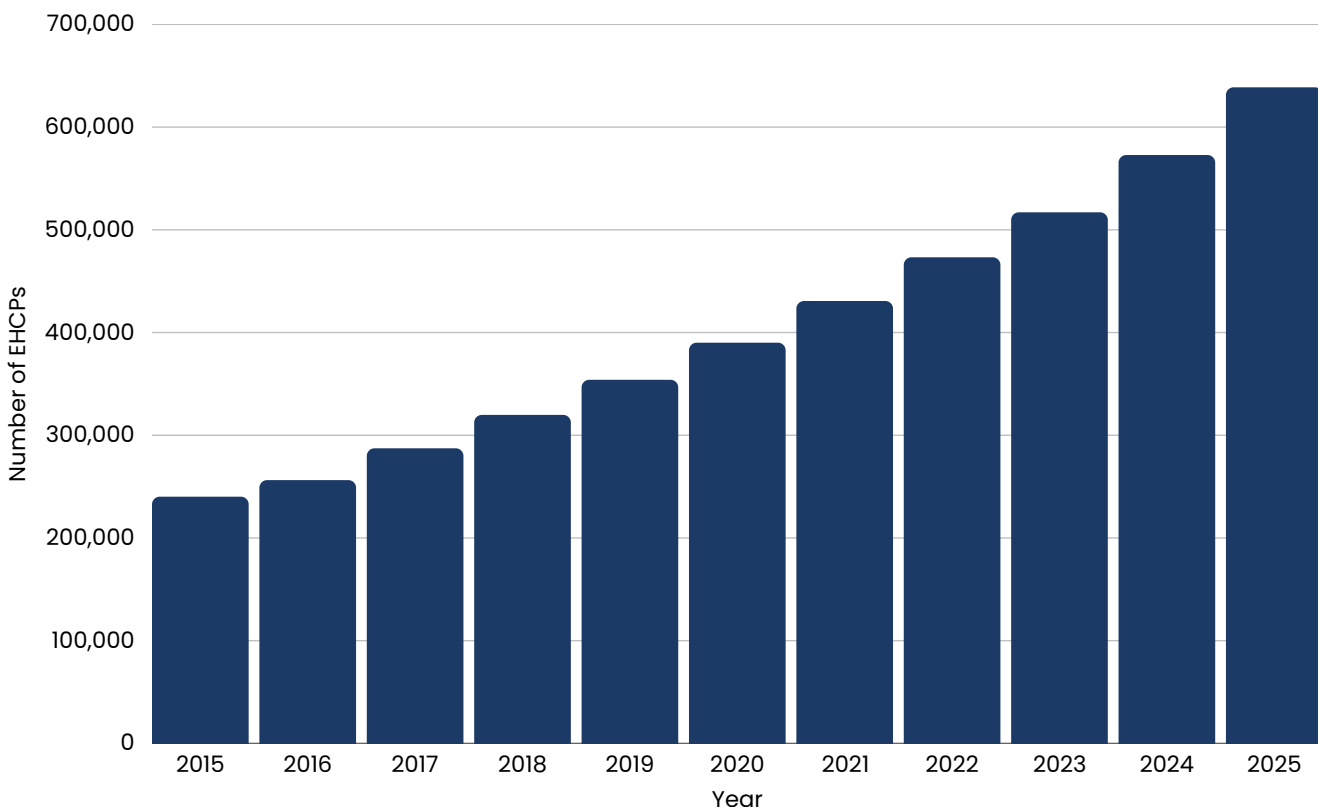
Instead, local authorities must assess eligibility on the grounds of special educational needs, disability, or mobility problems on a case-by-case basis. The assessment should take account of the child’s physical ability to walk to school, including if they were accompanied to school, and any health and safety issues related to their special educational needs, disability or mobility problems.

Although the statutory guidance introduced in 2023² makes clear that having an EHCP does not automatically confer a right to access home to school transport, the number of children with EHCPs remains a strong indicator for the number of children and young people with a recognised special educational need in a local area that may give rise to the need for transport.

Some 97% of survey respondents to previous CCN research³ cited the growing number of children and young people with EHCPs as a key contributor to rising expenditure on home to school transport. A more recent survey by the Local Government Association (LGA) also found that the highest-ranking factor of what is driving the increase school transport costs were EHCPs.⁴

A further area of growth in the numbers eligible for transport is in young people over the age of 16 with SEND. Here we have seen another direct impact of the SEND reforms, introduced in the 2014 reforms, which extended local authority responsibility for SEND to age 25. Previous CCN research showed that between 2019 and 2023, the number of young people aged over 16 receiving SEND transport in CCN councils had increased by 39%.⁵

Figure 3 - Number of children and young people with EHCPs, 2015 to 2025. Education, health and care plans, 2025, DfE.



Increasing journey lengths resulting from the growing numbers in special schools and the constraints on capacity and accessibility of these schools

But there are other factors that determine expenditure in play, too. Some EHCPs entitle young people to placements within a special school, rather than their local mainstream school. This has a direct effect on council expenditure, with almost 50,000 children in CCN member councils using free home to school transport to travel to special schools in 2023.⁶

In the last year, the number of children and young people with EHCPs in state-funded special schools has increased by 4,800 and the number in independent and non-maintained special schools has increased by 4,200. Consequently, there are now around 194,000 pupils in special schools in England, the highest number ever, compared with 109,000 in 2014/15.⁷

This issue has been intensified in recent years by a shortage of state special school places, compared to the numbers eligible. Recent CCN research revealed that 83% of state special schools are either full or near capacity in 2023/24, a figure that is likely set to worsen.⁸

Consequently, councils are having to place more pupils in independent and non-maintained special schools: almost one in five young people in all special schools. With many of these even further afield than state special schools, transport costs have naturally increased for councils.

Increasing use of individual taxis and other high-cost forms of transport, partly as a result of parental expectations and demand for individual travel arrangements

Another significant factor is the rise in young people with SEND being transported in taxis and minibuses. CCN's previous research found that in county areas, 31,500 young people were being transported in taxis and cars in 2023, compared to just 2,200 transported in traditional school buses.⁹

This type of vehicle could be specified within an EHCP, and the rise in their use is also attributed to increasing complexity of need, including behavioural needs, and parental expectations for individual transport.

This has been a trend since the pandemic, with councils reporting that some families see travel by taxi as the norm to which their child is entitled to, despite guidance to the contrary. The use of cars, including taxis, to transport children with SEND to school increased by 36% from 2019 to 2023 in CCN member councils areas.¹⁰

The impact of inflation, a fragile provider market, and a diminished public transport network

Finally, the underlying costs associated with providing transport, such as fuel and vehicle prices and drivers' wages, combined with the competitiveness of the market in which transport contracts are commissioned and declining bus routes, is leading to a fragile market in which all home to school transport operates.

A previous survey of CCN member councils showed that 90% of local authorities said that 'market capacity' was leading to increasing expenditure on SEND HTST and 86% said it was leading to higher spend on mainstream HTST.¹¹ The difficulties and challenges that are associated with these costs and provider markets have significantly intensified as a result of Covid-19 and the cost-of-living crisis.

HOW MANY CHILDREN AND YOUNG PEOPLE ARE USING SEND TRAVEL SERVICES?

Only recently have government begun to understand the sheer levels of demand for SEND home to school transport that are a product of the growing SEND crisis. Historically, national level data on the numbers of children who are eligible for local authority funded transport have not been collected. However, in 2024 a BBC Freedom of Information (FOI) Request and supporting analysis by the CCN estimated that local authorities have seen demand increase by over 40% since 2018/19, with more than 183,000 children using the services in 2023/24.¹²

However, more recently, the Department for Education (DfE) has begun to collate data from local authorities.¹³ CCN has undertaken analysis of this to forecast the estimated number of SEND users, including by local authority type. This drew principally on DfE’s *Home-to-school travel: data collection 2024/25*, BBC 2024 data on SEND users from 2024, and uses assumptions consistent with PwC’s spending need analysis to project future growth. Appendix 1 provides further details on the modelling.

Based on this analysis, CCN estimates that for all councils in England, 206,000 young people up to the age of 25 are now using SEND home to school transport. Half (49%) of these young people are in CCN member council areas, meaning that county and unitary councils are under the most pressure in delivering this service.

Based on current trends in the rise in numbers for both school-age and post-16 learners eligible for SEND school transport, it is estimated that councils in England could be transporting 311,304 young people by 2030/31: a 51% rise. In just six years, the numbers eligible will increase by 100,000 – a small city’s worth of pupils and 17,500 extra on average a year.

CCN areas are on course to see a 51,643 increase in eligible young people, higher than any other part of local government. This shows that CCN members are firmly at the sharp end of this crisis.

Figure 4- Estimated number of eligible SEND HTST young people. CCN Analysis.

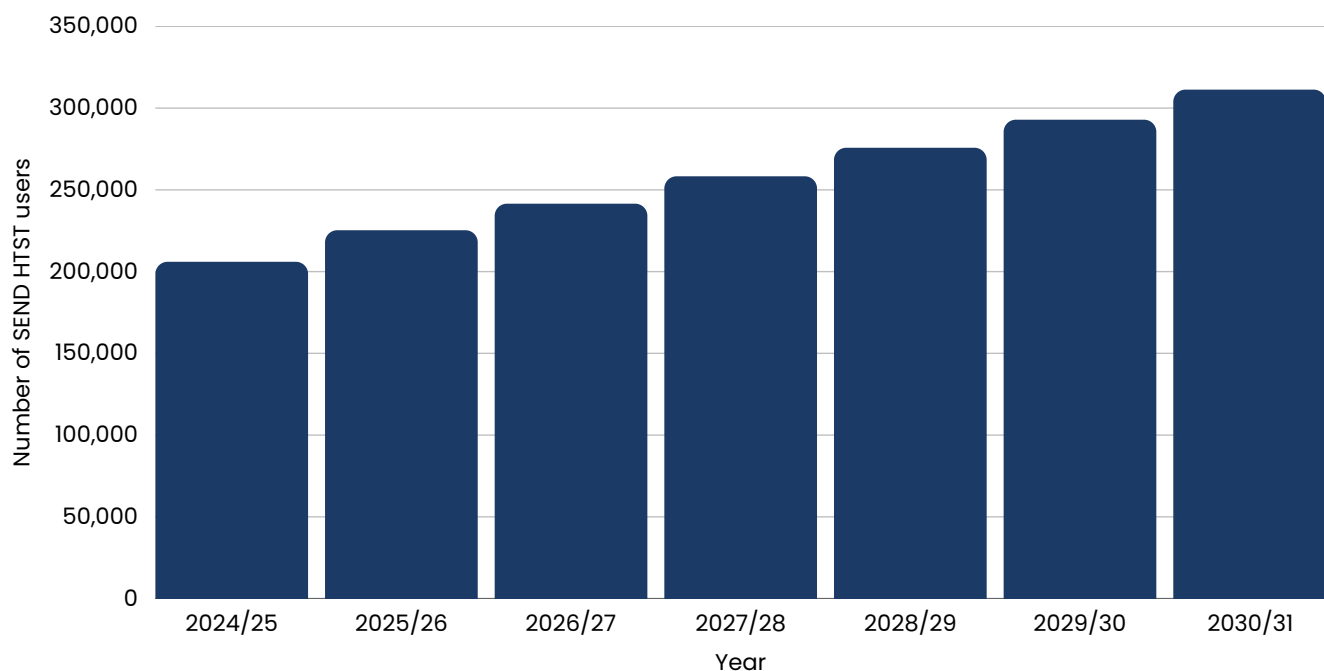
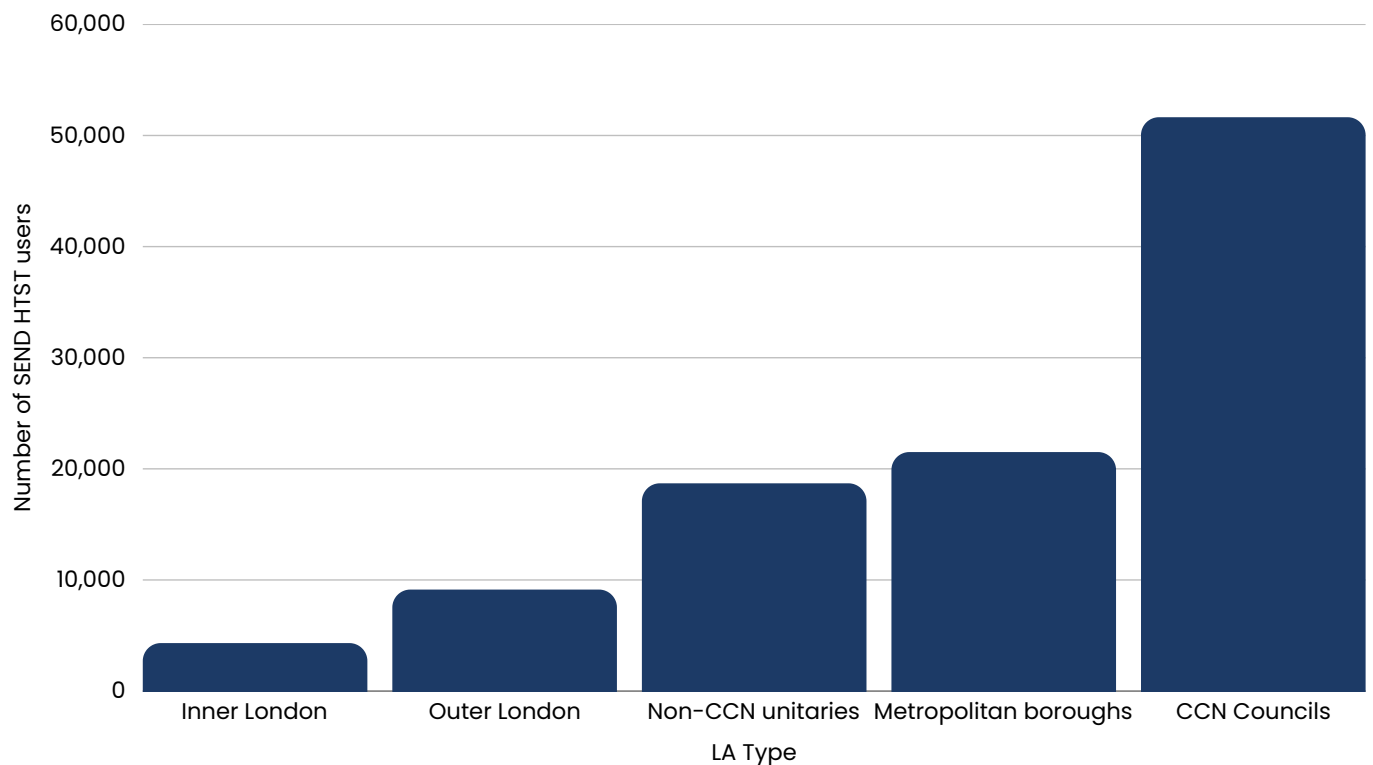


Table 1 - Estimated increase in eligible SEND HTST young people 2024/25 to 2030/31 by LA type. CCN Analysis.

LA Type	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30	2030/31
Inner London	8,652	9,353	10,036	10,738	11,479	12,214	12,971
Outer London	18,952	20,733	22,123	23,561	25,092	26,547	28,087
Non-CCN unitaries	36,462	40,035	42,918	45,879	48,953	51,939	55,159
Metropolitan boroughs	41,818	45,749	49,043	52,476	56,044	59,575	63,328
CCN Councils	100,116	109,427	117,415	125,634	134,177	142,630	151,759
England	206,000	225,297	241,534	258,288	275,745	292,905	311,304

Figure 5 - Estimated increase in eligible SEND HTST young people 2024/25 to 2030/31 by LA type. CCN Analysis.



WHAT ARE THE FORECASTS FOR FUTURE COSTS AND SPENDING?

With spending on home to school transport having risen 150% over the past decade and demand set to increase further, there is little signs that these pressures will ease up.

In 2025, PwC was commissioned by CCN to provide an updated analysis of the spending pressures facing local government in England, focusing on the period up to 2030/31. This analysis provides updated spending need projections for services, including home to school transport. A summary of the methodology and assumptions underpinning the analysis can be found in Appendix 2.

Based on recent spending pressures continuing throughout the forecast period, PwC’s analysis suggests that the costs of providing SEND home to school transport services will rise from just under £2bn in 2024/25 to almost £3.4bn by 2030/31. This would represent a further 73% growth in spending over the period.

County and rural unitary councils face the biggest pressures. By 2030/31, they will account for 50% of the total SEND home to school transport costs in England, rising from £975m in 2024/25 to £1.7bn by the start of the next decade.

Table 2 - Total SEND HTST spending need forecasts 2024/25 to 2030/31. Continuation of Service Pressures Scenario (£m).
PwC, 2026.

LA Type	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30	2030/31
Inner London	91	102	111	121	132	144	156
Outer London	193	219	239	260	282	304	329
Non-CCN unitaries	281	320	351	383	417	452	489
Metropolitan boroughs	412	466	511	557	608	660	717
CCN Councils	975	1,105	1,211	1,322	1,439	1,560	1,691
England	1,953	2,212	2,423	2,642	2,879	3,119	3,381

Bringing together these cost projections and CCN estimates on future demand, the data also reveals the per-user cost for local authorities, outlining how individual costs will increase over time.

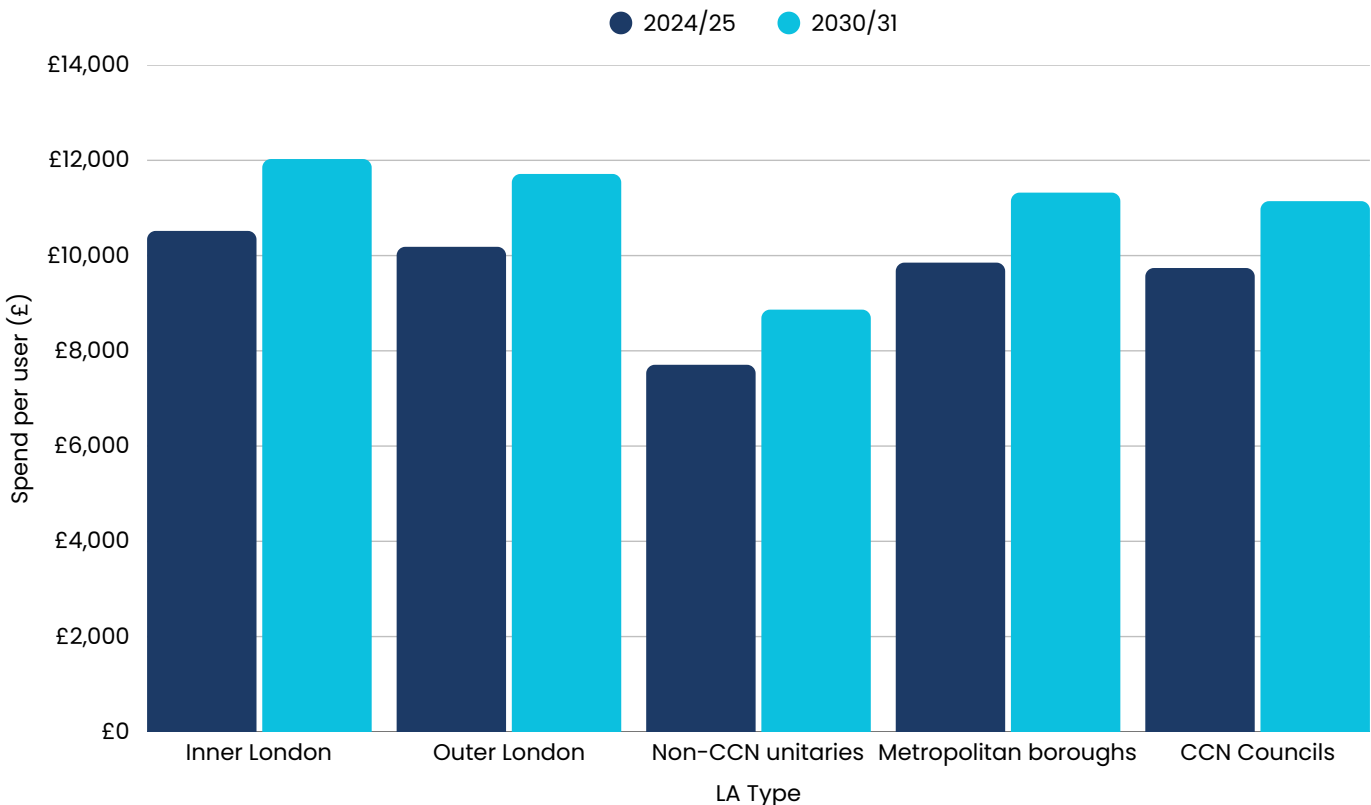
Last year, the network estimated that all local authorities spent on average £9,481 per user to provide SEND school transport and that figure is set to reach £9,818 in 2025/26. In contrast, research by the LGA and Isos Partnership last year estimated the average cost of providing mainstream school transport is only £3,000 per pupil, per year.¹⁴

Not only are per-head SEND transport costs treble that of mainstream school transport costs, they are projected to worsen: reaching almost £11,000 nationally by 2030/31.

All but one council tier (non-CCN unitaries) will be spending over £11,000 per year on average per-pupil to provide SEND school transport by the end of the decade, with CCN members spending £11,143 on average.

The highest per person SEND transport costs are found in London, where individual transport costs are the higher and there are less service users.

Figure 6 - Per-SEND service user spending, 2024/25 and 2030/31. CCN Analysis.



With spend on SEND home to school transport rising so dramatically, this will continue to squeeze the available resources for mainstream services.

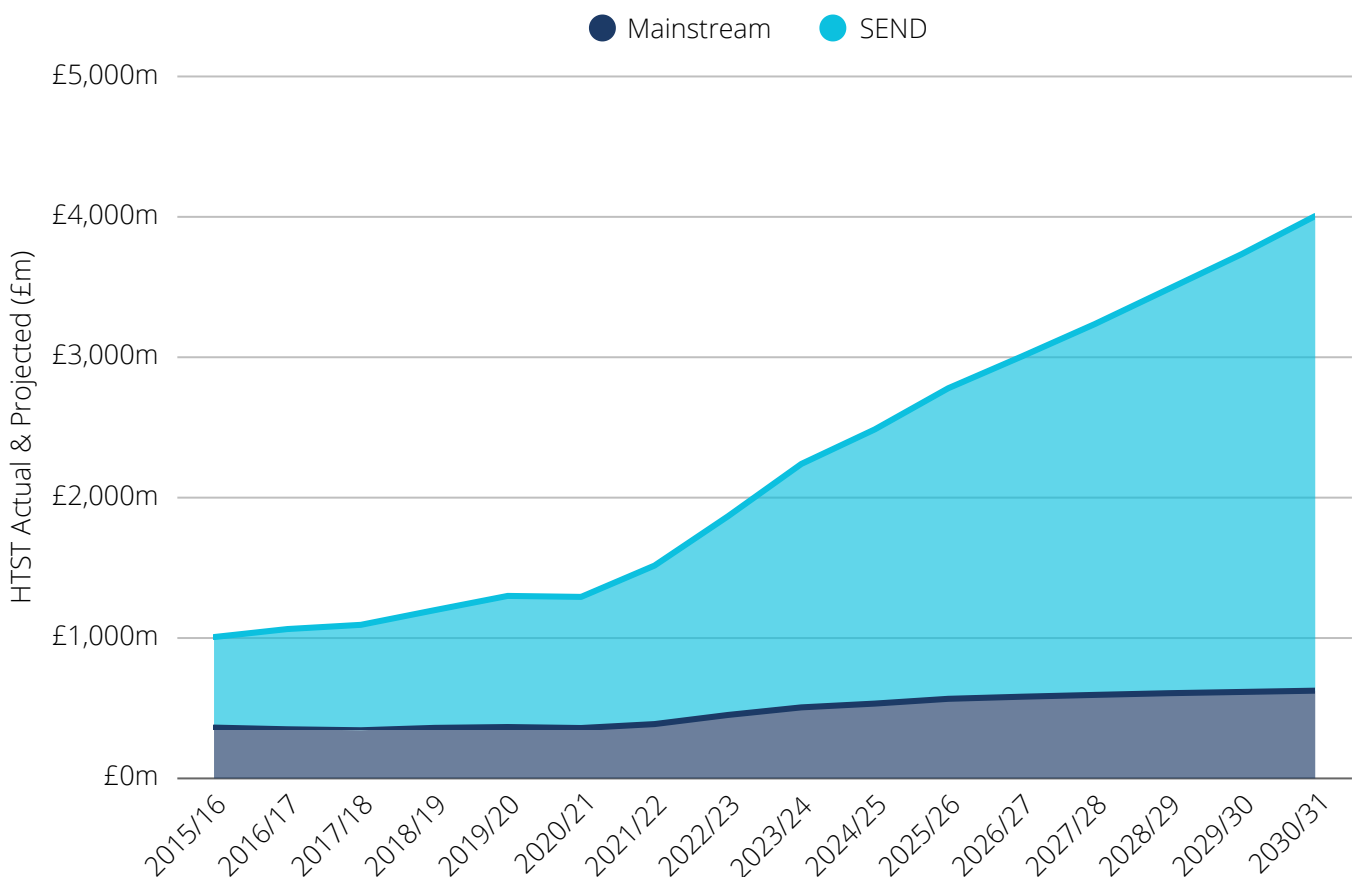
Here, councils have the ability to decrease eligibility, and some have cut down to the legal threshold. This is borne out by the numbers: in 2015/16, 64% of their entire HTST budgets was spent on SEND pupils up to 25 years old, growing to 79% in 2024/25. By 2030/31, PwC's costs projections suggest this could reach 84% by 2030/31.

Despite the continuing pressures in SEND HTST reducing the available resources for mainstream school transport, the costs of providing these services will continue to rise due to increasing pupil numbers and fuel costs, albeit at a slower pace.

Mainstream school transport costs are estimated to increase from £533m in 2024/25 to £625m in 2030/31. But mainstream school transport is very much a 'county issue' – 84% of the entire £625m cost of providing services by 2030/31 will be attributable to county and CCN unitary councils due to the larger distances travelled in rural and county areas.

Faced with having to spend more each year on SEND school transport, councils are increasingly looking to further pare back mainstream school transport eligibility. With CCN estimating its councils face a cumulative funding gap of £11bn over the next three years,¹⁵ a recent survey from the CCN found that three-quarters of county and unitary councils were set to tighten eligibility for mainstream school transport.¹⁶

Figure 7 - Actual HTST expenditure 2015/16 to 2023/24 (DfE) and PwC spending need forecast (Continuation of Service Pressures Scenario) 2024/25 to 2030/31. (£m). PwC, 2026.



School transport services are widely accepted as having essential societal benefits, providing a vital means for pupils to get to school. But at time when councils, and particularly CCN members, are facing severe funding challenges across all services, the rising costs of home to school transport cannot be overlooked any further.

HTST is an incredibly complex service to deliver, even more so in large rural and county areas. Some county authorities can have over 1,200 contracts with over 300 suppliers, with this likely replicated in other councils across the country. Despite this complexity and rising costs, slower growth in spending within mainstream school transport shows that councils are able manage costs effectively when they have the levers to do so.

As CCN's report with Isos Partnership in 2023 showed, councils have done all they can to mitigate rising costs through more efficient procurement exercises and effective data and analytics planning, but ultimately, they have few levers to pull – they are hamstrung by the present legal system that SEND services operate in.

The government itself has accepted that the system put in place in 2014 is 'broken' and is not working for families, children, schools or councils. Ministers have promised wide-ranging and fundamental reform of the system.

Crucially, they have also recognised the financial strains the system has placed on councils, taking decisive action to provide a solution to historic SEND deficits, while committing to absorb all SEND spending into central government from 2028 onwards. These announcements, including paying off 90% of high-needs deficits up to March 2026, have been warmly welcomed by CCN and will provide significant financial relief to councils.

But the analysis contained in this report clearly demonstrates that the financial challenges for local authorities caused by the SEND system will not cease with the removal of high-needs deficits. Spending on home to school transport is set to continue to rise unrelentingly and proposals in the Schools White Paper remain crucial to making home to school transport services, and wider local finance, sustainable.

While this report has outlined that not every child with an ECHP requires, or can access, home to school transport, it is clear the well-intended reforms introduced in 2014 have directly resulted in an unsustainable rise in demand for services and associated costs.

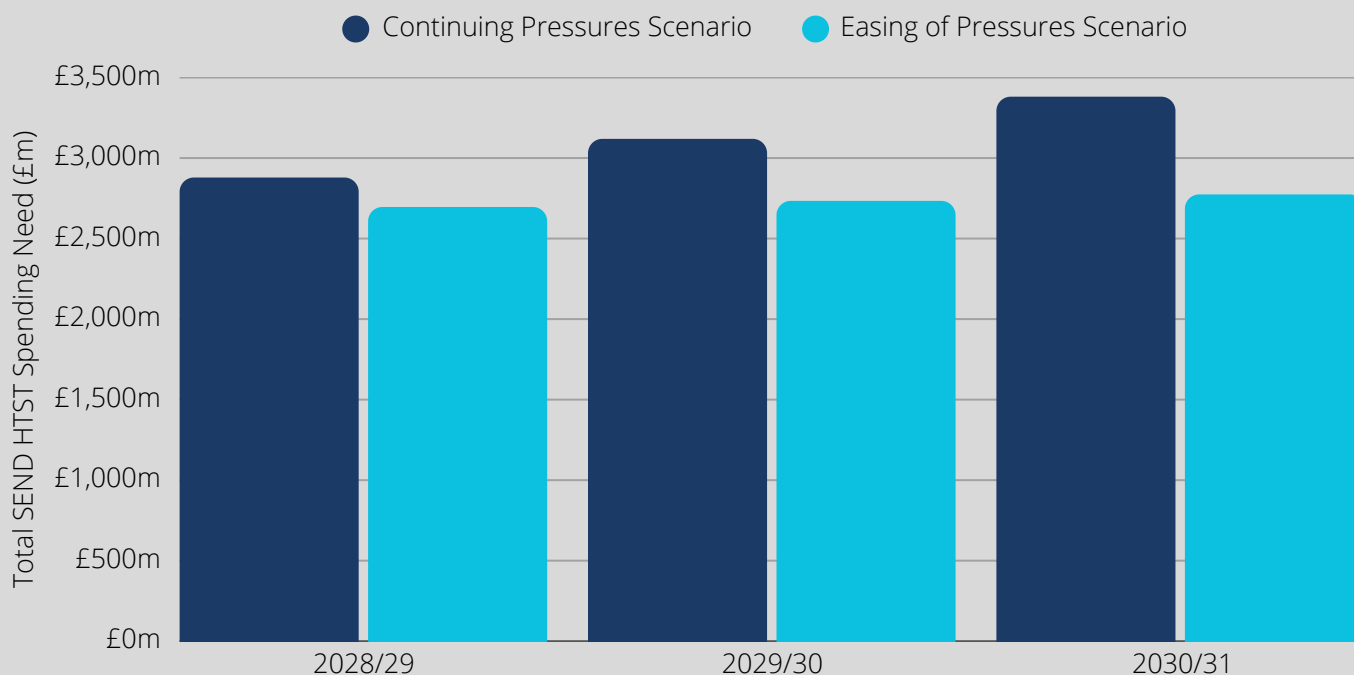
Looking ahead the rate of increase in children and young people with EHCPs is speeding up – with CCN projections showing a further increase of 200,000 by 2028/29.¹⁷

Given previous trends in spending, and faced with this continuing trajectory of increasing demand within the SEND system, there is no evidence to suggest the cost projections in this report will not become reality – reaching £3.4bn by 2030/31.

However, if fundamental reform is implemented to slow the pace of demand, PwC's alternative spending need forecast for SEND home to school transport demonstrates the potential financial impact.

In this forecast for CCN, PwC assumes national policy intervention is implemented by 2028/29 to reduce the growth in demand for SEND home to school transport services. Within this scenario of an easing of pressures, the average annual growth rate in users reduces to 4.7% from 7.6% in the main scenario of continuation of pressures. This scale of reduction in demand would result in the overall cost of SEND home to school transport being £600m lower by the end of the forecast period.

Figure 8 – Comparison of PwC spending need forecasts 2028/29 to 2030/31 (£m). PwC, 2026.



But to achieve this potential reduction, the government’s forthcoming reforms must be radical and recognise the specific interlinked nature of the SEND system with the provision of HTST, empowering local authorities with the ability to reform services locally so they can be placed on a more sustainable footing.

In setting out their vision for reform and further investment in mainstream schools to support those with SEND, ministers have indicated this will be focused on ensuring mainstream schools are more inclusive, enabling more children with SEND to thrive with their peers locally, and focusing provision within special schools on those with the most complex needs.

In its October report on the SEND system, CCN clearly outlined that an emphasis on inclusion and investment in mainstream settings by the present government is to be strongly welcomed. Almost all stakeholders are agreed that system-reform must support schools to become more inclusive and meet more children’s needs locally within mainstream education.

At heart, any changes to the system should enable more SEND pupils to be taught in their local school, reducing the reliance on state and independent special schools. The evidence shows that a reduction in young people being placed in special schools could help contain expenditure. The LGA recently asked a rural council to model 33% of young people attending a mainstream school instead, and this would generate savings of £1.9m or 7% of their budget.¹⁸

However, while a more inclusive system of mainstream education is the essential and necessary foundation for SEND reform, this alone will not deliver the lasting and fundamental change needed to address the root challenges within the system, and the knock on impacts it creates for home to school transport.

Reforms must go further by making mainstream schools more inclusive through implementing legislative changes to the Children and Families Act 2014 and associated guidance to focus statutory plans on those most in need, while reforming tribunals and the role of statutory partners.

Recommendations

- **The upcoming Schools White Paper must set out ways to enable more local mainstream schools to be able to support more pupils with SEND needs.**

This would require a re-shaping of the current education system, from curriculum and teaching, to build greater inclusion in mainstream schools, reducing the reliance on specialist school placements and long distances travelled by pupils using free school transport.

- **In a reformed system, EHCPs should be for the pupils with the most severe needs.**

At present, an EHCP is typically the only route for many families to secure SEND support for their child. In a new system where mainstream schools are enabled to support more pupils with more moderate SEND needs, more young people will be able to be supported without recourse to a statutory plan. Given the link between EHCPs and the rise in SEND home to school transport costs, this would help reduce costs over time, while improving outcomes for children.

- **As part of fundamental reforms to the tribunal system, the government must ensure that rulings on placements cannot be made without full consideration of the relative transport costs.** At the least, the government guidance should make clear that a tribunal ruling on a placement does not supersede the local decision on the nearest suitable school for the purposes of transport. At present, tribunals can rule in cases for individuals' SEND support (including entitlement to a specific school and specific transport) without assessing the cost of school transport on the local authority.

In addition, this government should reconsider the independent recommendations by Isos Partnership contained in their 2023 report for reforming home to school transport services more widely, including:

- Provide a national means-testing policy so that families above a specified income threshold are required to make a financial contribution to home to school transport, if they choose to use it. The contribution could be determined locally, up to a national ceiling. This would need to be implemented sensitively and progressively, bearing in mind the current cost of living crisis.
- For mainstream home to school, reconsider the statutory walking limit eligibility criteria. An alternative could be eligibility for support with travel to school for families that cannot reach the nearest suitable school through either walking, public transport or cycling (this would need to be modelled and a simple method for assessment would have to be devised).
- Amend statutory guidance to make clear that transport arrangements for children and young people with SEND should be reviewed annually, with a presumption towards encouraging greater independence over time.
- Reinforce the message that local government should only be offering – and parents should only be expecting – individual taxi transport as an option of last resort, if deemed to be essential on the grounds of health and safety or because maximum journey times would otherwise be exceeded.
- Develop “support with travel” assessments for children and young people with SEND. This could then be based on whether they could reasonably make the journey to school by walking, cycling or public transport, if accompanied by a parent/adult.
- For families eligible for support with mainstream services, transport should be provided to a pick-up or drop-off point within a 2-mile radius, but not to individual homes. Local government could use their discretionary powers to support families with multiple challenges who might not be able to access local pick-up points.

CCN SEND HTST Demand analysis methodology

CCN has undertaken a separate and additional analysis to PwC to forecast the estimated number of SEND HTST users using the latest available national data. This drew principally on Department for Education (DfE) *Home-to-school travel: data collection*, BBC FOI data on SEND HTST users from 2024, and uses assumptions consistent with PwC's spending need analysis to project future growth. The following steps are then taken to arrive at the analysis of estimated SEND HTST service users:

- **Step one:** the total number of pre-16 SEND HTST users in 2024/25 across all English local authorities is established by using data contained in DfE's *Home-to-school travel: data collection*. This estimates that 180,000 pre-16 receive HTST for SEND but does not provide a breakdown by local authority type.
- **Step two:** using CCN and PwC analysis of BBC FOI 2024 data* on SEND HTST users, CCN estimated the distribution of pre-16 SEND home to school transport users across different local authority types. The following table shows the estimated distribution of pre-16 SEND home to school transport users by local authority type.

LA type	Estimated Pre-16 SEND HTST users 2024/25	% of users
Inner London	7,560	4.2
Outer London	16,560	9.2
Non-CCN unitaries	31,860	17.7
Metropolitan boroughs	36,540	20.3
All CCN	87,480	48.6
England	180,000	100

- **Step three:** to estimate the number of post-16 SEND HTST transport users, CCN again uses the latest *Home-to-school travel: data collection* as the baseline. This estimates in 2024/25 there was 50,000 post-16 transport users. However, the DfE data does not breakdown this estimate between mainstream and SEND users, nor local authority type.
- **Step four:** To estimate the proportion of post-16 SEND HTST users, CCN uses analysis by Isos Partnership contained in its report for CCN in 2023, which estimated that for CCN councils 52% post-16 users were SEND HTST. Using this split as a evidence-based proxy, this results in an estimated 26,000 post-16 SEND HTST users in 2024/25. To estimate the distribution of users across different local authority types, CCN uses the same distribution as pre-16 users.

LA type	Estimated Post-16 SEND HTST users 2024/25	Estimated total SEND HTST Users 2024/25
Inner London	1,092	8,652
Outer London	2,392	18,952
Non-CCN unitaries	4,602	36,462
Metropolitan boroughs	5,278	41,818
All CCN	12,636	100,116
England	26,000	206,000

*for 16 local authorities with missing data, gaps were filled for each individual council by using DfE data on ECHPs and the ratio of users at the relevant LA type to arrive at an estimated number of users.

- **Step five:** to project forward baseline figures for each local authority type, CCN uses assumptions consistent with PwC's spending need analysis in the 'continuation of service pressures scenario' (see Appendix 2) to project future growth. This incorporates two steps:

- Office for National Statistics age 5-19 population projections for each local authority.

- Adjusting the growth rate to reflect recent volume growth in excess of recent population growth.

This results in the following annual growth rates for each local authority type being applied to forecast future growth in SEND HTST users:

	2025/26	2026/27	2027/28	2028/29	2029/30	2030/31
Inner London	8.10%	7.30%	7%	6.90%	6.40%	6.20%
Outer London	9.40%	6.70%	6.50%	6.50%	5.80%	5.80%
Non-CCN unitaries	9.80%	7.20%	6.90%	6.70%	6.10%	6.20%
Metropolitan boroughs	9.40%	7.20%	7%	7%	6.30%	6.50%
All CCN	9.30%	7.30%	7%	6.80%	6.30%	6.40%
England	9.40%	7.20%	6.90%	6.80%	6.20%	6.30%

PwC Spending Needs Analysis

In 2025, PwC was commissioned by CCN to provide an updated analysis of the spending pressures facing local government in England, focusing on the period up to 2030/31. This analysis builds on PwC's previous work, published in September 2024, which conducted an analysis of the spending pressures for the period from 2022/23 to 2029/30.

The updated analysis examines the same service areas as the 2024 report and follows the same approach as the 2024 report, to consider how spending need for local authorities might change in the future. A more detailed summary of the approach can be found in the 2024 report.

In summary, the analysis focuses on two main elements to assess spending needs:

- **Establishing a baseline estimate of spending needs for 2023/24, breaking expenditure down into baseline unit costs and baseline service user volumes.** For HTST transport expenditure data, PwC used Education and Skills Funding Agency, Section 251 documents. For the 2025 analysis, updated 2023/24 expenditure outturn data results in a higher baseline and therefore higher projected spending across the forecast period.
- **Projecting future spending needs from 2024/25 to 2030/31 by applying forecast drivers to unit costs and separate forecast drivers to volumes.** The table to the right shows unit cost and volume drivers.

For the 2025 analysis, PwC used updated assumptions for the volume and cost drivers, reflecting the latest outturn data and updated forecasts for inflation, earnings growth and population growth. These updates result in higher projected growth rates compared to the previous projections.

Spending element	Unit cost driver	Volume driver
SEND home to school transport	CPI inflation	Population 5-19
Mainstream home to school	CPI inflation	Population 5-19

As with the 2024 report, an adjustment has been made to account for recent service-specific spending pressures. This has been addressed by estimating the extent to which actual volume or unit cost growth in recent years has been greater than the growth in the forecast drivers (for example inflation or earnings growth).

As a result of this analysis, adjustments have been applied to volume drivers in the SEND element of home to school transport.

For the 2025 analysis, PwC used updated estimates of the impact of recent service-specific cost pressures in adult social care, children's social care and SEND home to school transport. These adjustments now incorporate an additional year of outturn data for 2023/24. As recent outturn growth exceeded the forecast drivers, this increases the scale of the adjustment and the resulting projections.

This updated analysis includes two scenarios:

- **1) Scenario 1: continuing spending pressures.** Based on a continuation of recent cost and demand pressures for selected policy areas, with an adjustment for service-specific cost pressures for the whole period.
- **2) Scenario 2: easing spending pressures.** Assumes some national policy intervention such that service-specific spending pressures are eased by 2028/29, with the adjustment removed from the forecast for the remaining period.

1. **CCN and Isos Partnership** Special Educational Needs in England – How we got to crisis point (2025). Access [here](#).
2. **Department for Education**. Travel to school for children of compulsory school age: Statutory guidance for local authorities (2023).
3. **Isos Partnership & CCN**. From home to the classroom – making school transport services sustainable (2023). Access [here](#).
4. **LGA and Isos Partnership**. The future of Home to School Transport (2025). Access [here](#).
5. **Isos Partnership & CCN**. From home to the classroom – making school transport services sustainable (2023). Access [here](#).
6. Ibid
7. **CCN and Isos Partnership**: Special Educational Needs in England – How we got to crisis point (2025). Access [here](#).
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10. Ibid
11. Ibid
12. **BBC News** (March 2024). Access [here](#)
13. **Department for Education**. (2025). Home to school transport: LA data collection (2025). Access [here](#).
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15. **CCN**. Consultation response Provisional Local Government Finance Settlement 2026/27: (2026). Access [here](#).
16. **CCN**. Millions of residents in county areas face sweeping council service cuts as government funding covers just 2p in every £1 of new costs (2026). Access [here](#).
17. **CCN and Isos Partnership**: Special Educational Needs in England – How we got to crisis point (2025). Access [here](#).
18. **LGA and Isos Partnership**. The future of Home to School Transport (2025). Access [here](#).

CCN

THE VOICE OF COUNTIES

CCN is the voice of England's counties. Representing the local authorities in county areas, the network is a cross-party organisation which develops policy, commissions research, and presents evidence-based solutions to issues on behalf of the largest grouping of councils in England.

In total, the 21 county councils and 18 unitary councils that make up the CCN represent 26 million residents, account for 39% of England's GVA, and deliver high-quality services that matter the most to local communities.

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