

Mapping Northern Ireland

State of the Sector Report 2025



Contents

Introduction	4
Headlines	5
Modernising for Growth	5
Improving Access to Health and Social Care	6
Investing in Community Solutions	6
Accelerating Community-Led Climate Action	7
Delivering a Fair Deal for Volunteers	7
1. Community Transport Operators (CTOs)	8
1.1 Primary and Secondary Operators.....	8
1.2 Mapping Northern Ireland and CTA membership	8
1.3 Income	10
1.4 Membership response rates	11
1.5 Section 10b Permits	13
1.6 Summary	14
2. Income.....	16
2.1 Funding sources.....	16
2.2 Barriers and challenges	17
2.3 Summary	18
3. Staff and Volunteers	20
3.1 Paid Staff.....	20
3.2 Volunteers	21
3.3 Volunteer recruitment	22
3.4 Volunteering and demand.....	23
3.5 National Living Wage Employer	24
3.6 Summary	25
3.7 Case Study: Volunteer Now	26
4. Services	28
4.1 Rural/urban mix.....	28
4.2 Service type	30
4.3 Passengers	31
4.4 Times of operation	33
4.5 Summary	34
4.6 Case study: Down Armagh Rural Transport.....	35

5. Vehicles 36

5.1 Vehicle ownership	36
5.2 Types of vehicles.....	38
5.3 Fuels	39
5.4 Barriers to electric vehicles	40
5.5 Purchasing new vehicles.....	41
5.6 Financing new vehicles	42
5.7 Summary	43
5.8 Case Study: Cancer Fund for Children	44

6. Policy and priorities..... 45

6.1 Sector priorities	45
6.2 Connections to decision makers	47
6.3 Summary	49

7. Survey Method and Response 50

7.1 Mapping Northern Ireland response	50
7.2 Secondary operators.....	51



Easilink Community Transport

Introduction by Frances Campbell, CTA Director for Northern Ireland

Mapping Northern Ireland is the first update to the State of the Sector research since the initial study in 2010. Focusing on Northern Ireland's Community Transport Operators (CTOs), this report aims to provide a vital source of information for CTOs, policy makers, funders, volunteers and the other stakeholders that use, fund, or link with CTOs.

The Community Transport Association (CTA) currently represents 76 member organisations across Northern Ireland and our research gathered important insights from both our primary and secondary members. Through this research, it became evident that we had gathered additional insights into the experiences of our primary members. As a result, the Mapping NI work evolved, leading to the creation of a separate report focused exclusively on the challenges faced by primary members, along with actionable recommendations.

Community Transport in Northern Ireland has faced significant challenges in recent years, including funding uncertainties and rising demand. Despite the challenges, our CTOs continue to exceed expectations for their passengers.

This research would not have been possible without the generous support of The National Lottery Community Fund through their Dormant Accounts Fund NI. I extend special thanks to them for recognising the value of this research and for their ongoing support and engagement throughout the project's lifespan. It has truly been a pleasure to work with such a committed and supportive organisation.

Since launching this research in 2024, I want to extend my thanks to everyone who contributed, especially our members. I also deeply appreciate those who completed surveys, generously shared their time, and answered our many questions. This has truly been a collective effort.

What is most striking is the value Community Transport brings to the lives of so many people across Northern Ireland and the impacts are profound. The dedication of our members to championing local needs is what keeps our sector vibrant. It has been extremely rewarding to witness this in action and hear firsthand from passengers about the difference Community Transport makes in their lives.



Headlines

“Mapping Northern Ireland” is the first comprehensive update to the State of the Sector research since the original study conducted in 2010. This research aims to offer an updated snapshot of Community Transport Operators (CTOs) in Northern Ireland, focusing on their services, workforce, volunteers, income, and vehicle fleets, to showcase the extent and impact of the Community Transport sector.

The results highlight the wide diversity within the sector, ranging from small, volunteer-led organisations to larger operators serving multiple regions. The services offered are driven by a variety of passenger needs, travel purposes, and the unique challenges posed by both rural and urban settings in which these services function.

Collectively, the sector faces ongoing challenges that threaten the sustainability of Community Transport. These include a lack of financial stability, increasing demand for services, difficulties in attracting and retaining a skilled workforce, and the need to ensure sustainable transport solutions and vehicle replacement.

The insights from this survey are crucial for CTA in shaping targeted support for the sector and advocating with key stakeholders. This data not only provides a powerful foundation for tracking progress over time but also enables meaningful comparisons between the state of Community Transport in Northern Ireland and other regions across the UK, driving future improvements. Mapping Northern Ireland builds on the success of the Mapping Scotland – More than a Minibus project, the recent Mapping England: State of the Sector Community Transport 2024, and upcoming research in Wales. Each report offers valuable insights into its respective region, but together, they represent a crucial step toward creating a shared UK dataset. By leveraging data and insights across regions, we can draw meaningful conclusions, foster learning, and shape national priorities.

The key policy areas outlined in the CTA’s 2024 manifesto are central to the sector’s development. Below is a summary of the key findings from the survey in relation to these areas:

Modernising for Growth

Driver licensing requirements pose a significant challenge for Community Transport operators in Northern Ireland. While driver licensing in Northern Ireland remains based on EU laws applied in the UK, Great Britain has taken a less stringent approach. In contrast, the Department for Infrastructure (DfI) in Northern Ireland has adopted a stricter interpretation, leading to more rigorous licensing requirements that uniquely impact the sector.

DfI mandates that all “paid drivers” defined as those receiving compensation beyond out-of-pocket expenses must hold a full Category D or D1 license. This policy has created significant recruitment and retention challenges, reducing the pool of suitably qualified drivers at a time when demand for services is increasing, and workforce shortages persist. These challenges stem from a 2018 update to DfI’s driver licensing guidance for minibus drivers¹. Previously, drivers could operate a minibus under “grandfather rights” with a D1 Not for Hire or Reward (NFHR) entitlement. This change has further restricted the availability of eligible drivers, exacerbating workforce shortages at a time of rising demand for Community Transport services.

.....
¹ <https://www.nidirect.gov.uk/sites/default/files/publications/Driver-Licensing-Requirements-for-Minibuses-April-2018.PDF>

Improving Access to Health and Social Care

Health-related transport is a key reason for the use of Community Transport and represents a growing area of need for passengers. While some operators secure short-term grants for out-of-area health transport and tailored programmes, these efforts are fragmented and unsustainable. Health and Social Care Trust funding makes up just 10% of Primary Purpose Operators' income, whereby in comparison it represents the largest funding source for Secondary Purpose Operators (31%).

This lack of consistent funding from health funding sources directly limits Community Transport operators' ability to plan and provide coordinated health-related transport services. Cross-departmental engagement and funding are priorities for 9% of primary and 7% of secondary operators, highlighting the need for coordinated government support.

A stronger partnership with the Department of Health and Health and Social Care Trusts is essential for long-term funding solutions. Community Transport operators reported strong connections to local voluntary and community groups. 85% of Primary Purpose Operators agreed, while 60% of Secondary Purpose Operators reported strong local links with their voluntary and community groups.

These findings align with a key focus of the CTA's manifesto, advocating for a unified strategy for non-emergency patient transport and hospital discharge, supported by stable, statutory funding. Working towards CTA's manifesto would enable CTOs to address transport inequities and improve access to health and social care services across Northern Ireland.

Investing in Community Solutions

Funding stability remains the top concern for both Primary and Secondary Purpose Operators, with 37% of Primary Purpose Operators and 22% of Secondary Purpose Operators highlighting this issue. Recruitment and retention of staff are also significant challenges for both, with 22% of Primary Purpose Operators and 21% of Secondary Purpose Operators citing workforce shortages. This highlights the difficulty of maintaining a skilled workforce while responding to increasing demand.

A critical issue is the gap between available budgets and the service levels required to meet community needs. Grant income often fails to keep pace with inflation or cover essential costs, including staffing, as well as increases in the Minimum Wage and National Insurance Contributions. While fair wages are essential for staff motivation and service delivery, fair work and fair funding must go hand in hand.

Community Transport employers are committed to ensuring staff are fairly compensated for their work, but the financial burden of adopting the Real Living Wage presents challenges. Striking a balance between paying fair wages and ensuring financial sustainability is crucial.

To address these concerns, collaboration across Government Departments is necessary to secure sustainable, multi-year funding that adjusts for inflation, covers core operating costs, and provides flexibility. This will offer long-term security for operators, staff, and passengers alike.

Accelerating Community-Led Climate Action

The CTA manifesto emphasises the need to encourage the adoption of electric vehicles (EVs) within the sector. However, in Northern Ireland, only 3% of Primary Purpose Operators and 2% of Secondary Purpose Operators have EVs in their fleets. Barriers to EV adoption include limited local charging infrastructure, both public and depot-based, as well as financial constraints, with high upfront costs and insufficient funding options.

Diesel remains the primary fuel for CTO's. For Primary Purpose Operators, diesel fuels 91% of vehicles, while Secondary Purpose Operators have a more varied fuel mix, with diesel still accounting for 77%.

A recurring issue raised is the urgent need to replace ageing vehicles and modernise fleets. Both operator types rely heavily on grants, savings, and fundraising to fund new vehicles, making the challenge of replacing outdated vehicles a sector-wide concern.

This issue is further complicated by ongoing discussions about integrating EVs into the sector. While EVs offer a sustainable transport solution, concerns remain about their feasibility within the current Community Transport funding model.

Delivering a Fair Deal for Volunteers

Volunteers play an integral role in the success of Community Transport. Across Northern Ireland, the voluntary and community sector has seen an overall decline in volunteer numbers, especially since the COVID-19 pandemic. However, Community Transport providers have experienced a notable increase in volunteer numbers over the past year 62% for Primary Purpose Operators and 20% for Secondary Purpose Operators. This growth is largely attributed to targeted recruitment campaigns and strategic efforts to engage new volunteers.

Despite increased volunteer numbers within the past year, 54% of Primary Purpose Operators strongly disagree that they have enough volunteers to meet service demands, pointing to a significant gap. In contrast, Secondary Purpose Operators report a less severe shortage, with 20% strongly disagreeing.

It's crucial to recognise that effective volunteer development requires dedicated time and resources, a challenge compounded by financial constraints and operational pressures within the sector. CTA has already begun to provide increased support and peer-learning opportunities in this area, and will continue to offer these through Community Building Sessions and other learning initiatives.

1. Community Transport Operators (CTOs)

Community Transport is delivered by a wide array of organisations, each varying in size, structure, and purpose. The research challenges the idea of a “standard” or “typical” CTO in the sector, highlighting instead the diversity of CTOs, with each organisation uniquely tailored to meet the specific needs of the communities it serves, ranging from small, community-driven groups to larger, well-established entities.

Across Northern Ireland and from a wider UK perspective, CTOs have a significant presence and strong connections within local communities, ensuring that vulnerable or isolated individuals can access essential services and opportunities. In Northern Ireland, Community Transport offers a variety of services, including door-to-door transport, dial-a-ride, specialist transport for people with disabilities, and services connecting individuals to healthcare, social services, and rural areas, thereby promoting accessibility and social inclusion for those most in need.

1.1 Primary and Secondary Purpose Operators

CTOs are deeply connected within local communities, fulfilling a wide variety of transport needs across different sectors. Some CTOs dedicate themselves entirely to providing transport services, while others weave transport into a broader organisational mission that supports their wider goals.

In this report, we describe CTOs in two categories: Primary Purpose Operators, who dedicate themselves mainly to road passenger transport, and Secondary Purpose Operators, for whom transport plays a supporting role within a wider range of activities.

While this classification might not capture every unique aspect of each organisation’s role, it offers a helpful way to understand and appreciate the distinct contributions these groups make to Community Transport across Northern Ireland.

1.2 Mapping Northern Ireland and CTA membership

Based on the analysis of the 2023/2024 membership, CTA currently represents 76 member organisations in Northern Ireland, making up 6% of the overall CTA UK membership. CTA fosters strong working relationships with its primary members through their delivery of key funding programmes and initiatives administered by the Department for Infrastructure, including the Rural Transport Fund (RTF) and the Transport Programme for People with Disabilities (TPPD). This is illustrated in Figure 1.1. However, there is less information available about secondary members, and active engagement with them is an area for development moving forward.

Figure 1.1: CTA Northern Ireland membership by location

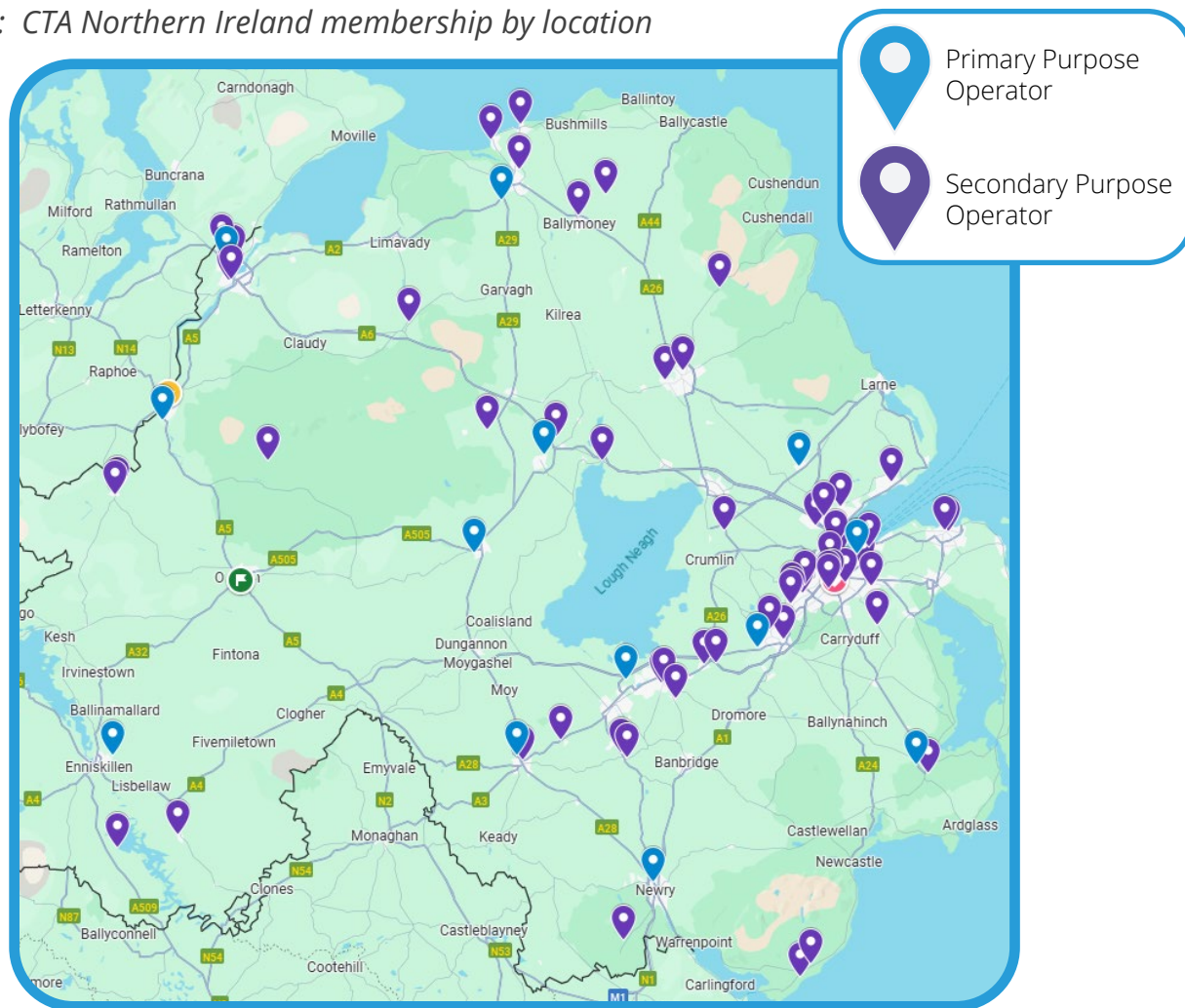


Figure 1.2: CTA Northern Ireland membership by organisational type.

CTA NI membership by type

Organisation Legal Structure	Primary Purpose	Secondary purpose
Registered Charity	1	33
Registered Charity, Company Limited by Guarantee	11	15
School or educational body	0	10
Unincorporated	0	4
Company Limited by Guarantee	1	1
Total	13	63

Created with Datawrapper

<https://datawrapper.dwcdn.net/F4AVQ/2/>

The breakdown of the organisational structure of these members is presented in Figure 1.2. There are differences in the organisational structures of Primary and Secondary Purpose Operators within the CTA NI membership. Notably, only one Primary Purpose Organisation is registered as a charity, while 33 secondary purpose organisations hold charity status.

The most common structure among these organisations was a “Registered Charity, Company Limited by Guarantee”. This was the strongest representation for Primary Purpose Operators, with 11 organisations adopting this structure. In contrast, 15 secondary purpose organisations also use this model, suggesting that combining charity status with limited liability is an effective way to engage in both primary and secondary transport roles.

Additionally, 10 Secondary Purpose Operators are schools or educational bodies, reflecting the diversity of their missions. The “Company Limited by Guarantee” structure is less common among Primary Purpose Operators, with only one organisation adopting this model in both categories.

In summary, the “Registered Charity, Company Limited by Guarantee” structure is the most prevalent among CTA members. However, the membership also encompasses a wide range of organisational forms, including registered charities, educational institutions, and unincorporated bodies. These diverse structures reflect the varied roles that organisations play in the Community Transport sector.

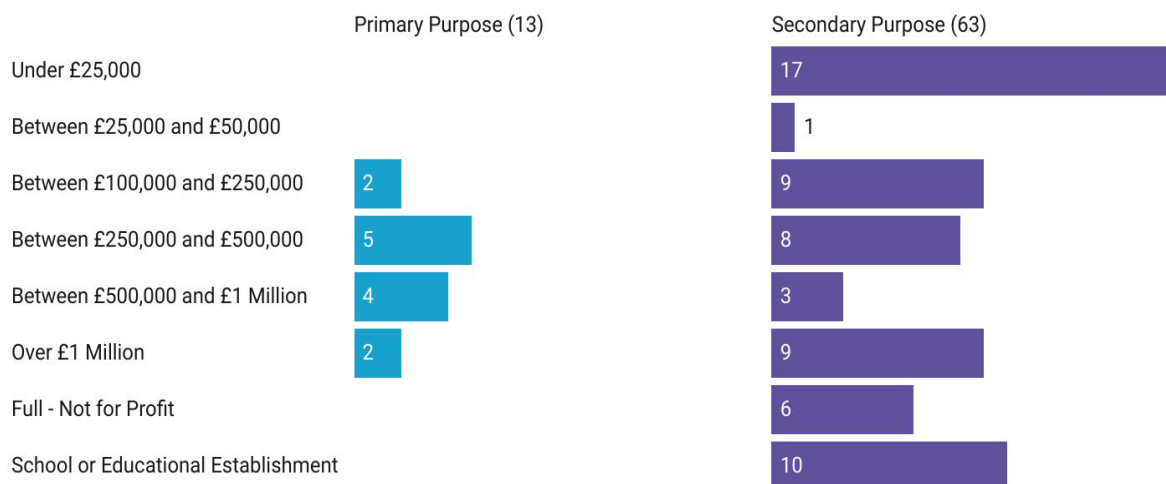
This highlights an ongoing need for support with charitable administration, especially for smaller organisations while also emphasising the need for association across a wide variety of organisational structures.

1.3 Income

The income distribution among Northern Ireland CTA members varies between Primary and Secondary Purpose Operators. Of the 13 Primary Purpose Operators, most report incomes ranging from £250,000 to £500,000, with four within the £500,000- £1 million band. Only two organisations have incomes exceeding £1 million, and none report earnings below £25,000. This indicates that Primary Purpose Operators are generally medium to large-scale organisations focused primarily on transport services.

Figure 1.3: CTA Northern Ireland membership by income.

CTA Northern Ireland membership by income



Created with Datawrapper

<https://datawrapper.dwcdn.net/hqIPk/2/>

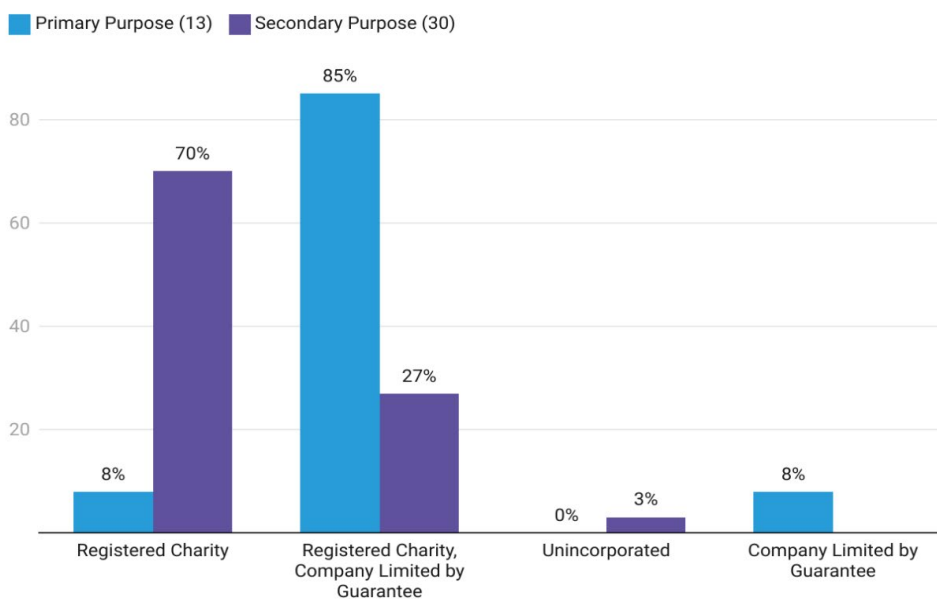
In contrast, Secondary Purpose Operators show a more diverse income range. Nine organisations report incomes exceeding £1 million, while others fall into the £250,000 to £500,000 and £100,000 to £250,000 brackets. However, a significant proportion - 17 organisations report incomes of less than £25,000, reflecting a higher prevalence of smaller scale operations within this group compared to Primary Purpose Operators.

1.4 Membership response rates

The survey results provide insights into the organisational structures of the responding CTOs, distinguishing between primary and secondary purpose providers. All of the 13 primary purpose providers participated, ensuring their responses accurately represent the structure of this group. This reflects the role of CTA in supporting its primary members through Rural Transport Grant Funding and the number of organisations with a primary focus in this area. Among secondary purpose organisations, 70% of responses were from Registered Charities, reflecting a strong preference for this organisational type in a secondary capacity. By contrast, 27% of responses came from Registered Charity, Company Limited by Guarantee organisations, and just 3% from unincorporated entities. Notably, there were no responses from Company Limited by Guarantee organisations within the secondary purpose category. This distribution aligns with the organisational structures presented in Figure 1.4, supporting the representativeness of the survey data for secondary purpose organisations.

Figure 1.4: Primary and secondary response by organisational type.

Primary and secondary response by Organisational type



Created with Datawrapper

<https://datawrapper.dwcdn.net/Wi0H6/1/>

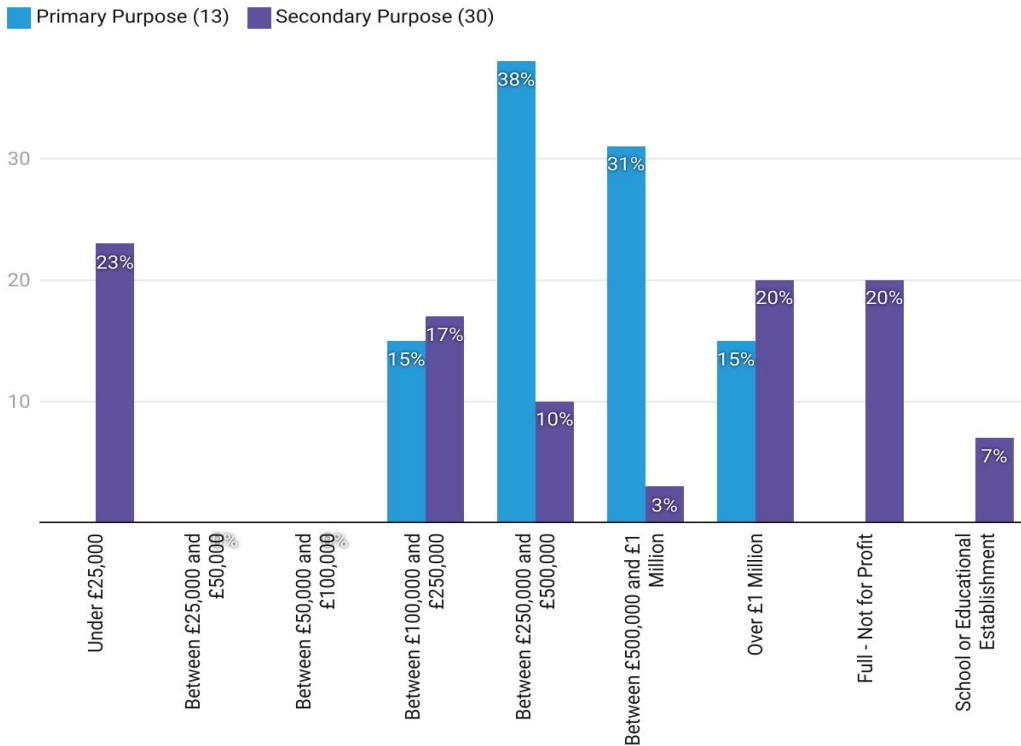
Figure 1.5 illustrates the income distribution among Northern Ireland’s CTOs, with all Primary Purpose Operators participating in the survey. This 100% response rate ensures a comprehensive and accurate representation of income across all bands, highlighting the scale of these organisations and their strong engagement with the CTA.

For Secondary Purpose Operators, the survey captures a diverse range of income bands. Notably, 23% reported incomes under £25,000, reflecting the prevalence of smaller organisations where transport serves as a supplementary service. A further 17% reported incomes between £100,000 and £250,000, while 10% fell within the £250,000 to £500,000 range. Three Secondary Purpose Operators reported incomes between £500,000 and £1 million, with a further 9 reporting incomes of over £1 million.

Interestingly, 20% of Secondary Purpose Operators were schools or educational establishments, underscoring the significant role transport plays in supporting education. Additionally, 7% of responses came from the ‘Full – Not for Profit’ category, emphasising the focus on non-profit transport provision. There is still more work to be done to fully explore the size, scope, and significance of secondary operators, as identified in this report. Understanding their role and contributions is essential to building a complete picture of the sector. This will form a key aspect of future work plans and activities, ensuring that secondary operators are better supported and integrated into the broader Community Transport framework.

Figure 1.5: Primary and secondary response by income.

Primary and Secondary response by income



Created with Datawrapper

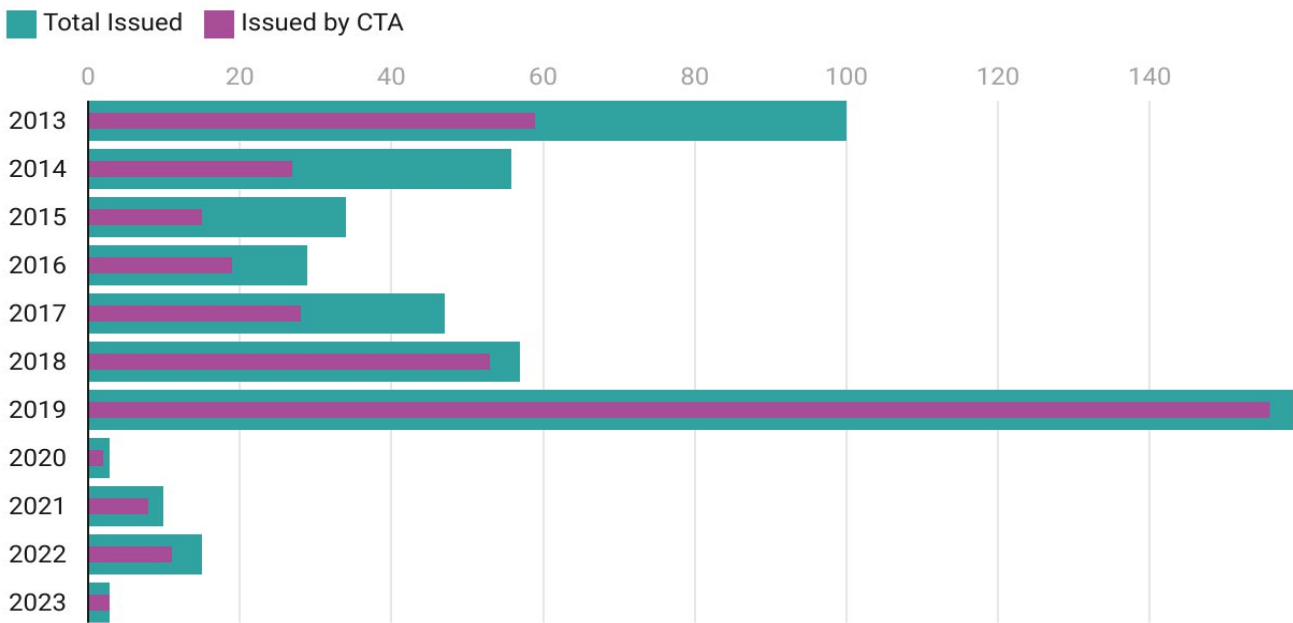
<https://datawrapper.dwcdn.net/0zGnd/3/>

1.5 Section 10b Permits

Between 2013 and 2023, the issuance of 10B permits in Northern Ireland has steadily declined, with CTA increasingly responsible for the majority of these permits. Permit issuance peaked in 2018 and 2019, during which the CTA was responsible for issuing nearly all permits. Since 2020, permit issuance has remained consistently low, shaped by challenges such as the COVID-19 pandemic. It is also important to note that the decline in permit applications coincides with the introduction of the new driver licensing regime in Northern Ireland, leading to a reduction in the number of organisations that have a minibus or are purchasing one to deliver services

In Northern Ireland it is important to note that 10B permits for Community Transport are issued without time restrictions or renewal requirements. This distinctive approach provides operators with long-term stability, reducing administrative burdens and enabling a stronger focus on serving communities. However, it also creates challenges for the CTA in tracking how many permits are still active and determining if they need to be renewed, given the lack of renewal requirements and time restrictions.

Section 10B Permits issued



Created with Datawrapper

Fig 1.6: Number of Section 10B permits issued in Northern Ireland 2013-23.

<https://datawrapper.dwcdn.net/19RUm/2/>

Source: [NI Direct 10b bus permits](#)

1.6 Summary

The Community Transport sector in Northern Ireland is highly varied, with organisations that either focus exclusively on transport services (Primary Purpose Operators) or integrate transport into broader community activities (Secondary Purpose Operators). CTA represents 76 members in Northern Ireland, which encompass a wide range of structures, including registered charities, educational institutions, and unincorporated bodies. Primary Purpose Operators are generally larger organisations, while Secondary Purpose Operators include many smaller groups.

1.7 Key Points

The Community Transport sector in Northern Ireland is diverse, with Primary Purpose Operators typically being larger organisations, often structured as “Registered Charity, Company Limited by Guarantee” (85%), while Secondary Purpose Operators are generally smaller, with over half (52%) registered as charities.

Most Primary Purpose Operators (85%) have incomes between £250,000 and £1 million, indicating their larger scale, while more than half of Secondary Purpose Operators (52%) earn less than £25,000, reflecting the smaller nature of many of these organisations.

Case study: Lagan Valley Rural Transport

Lagan Valley Rural Transport (LVRT) provides an invaluable service, offering transport to the whole community and us at Lisburn Downtown Centre. They provide accessible, tailored transport at an affordable rate - enabling those most isolated and vulnerable in the local community to access support.

The services LVRT provide a vital connection for those most isolated in our society - enabling each individual to benefit from being a part of the wider community.

Lisburn Downtown Centre supports people with a range of disabilities and those facing economic hardship. This is what they shared about their experience as a member and the benefits they gained from LVRT.

“Many of our members have a capped income and struggle to make ends meet, whilst others have limited mobility and struggle to access public transport. We often find transport to be a barrier to attending our services, meaning these individuals would continue to live socially isolated lives. The services LVRT offer ensures these individuals can access our support with transport tailored to their specific needs. The drivers are welcoming, compassionate and helpful. If not for LVRT many individuals would continue to live in isolation - LVRT services enable an inclusive community.”

- Lisburn Downtown Centre



2. Income

A reliable income stream is crucial for Community Transport operators, supporting long-term planning, vehicle procurement, and staff retention. Both primary and secondary operators consistently highlight income and funding stability as their top concerns, emphasising the sector-wide need for more consistent financial support.

2.1 Funding sources

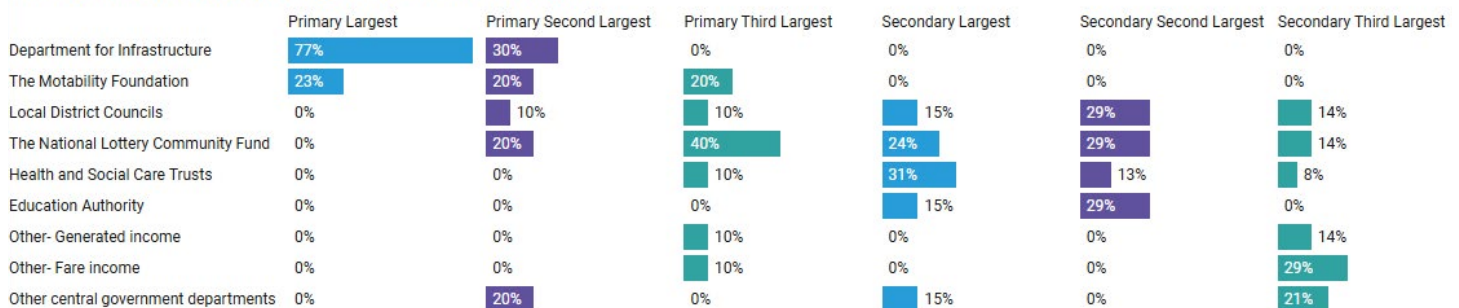
Survey respondents provided information on their funding sources, as illustrated in Figure 2.2. The data reveals distinct differences in funding patterns between organisations, reflecting their unique operational priorities and dependencies.

For Primary Purpose Operators, the Department for Infrastructure is the predominant funding source, supporting 77% of these organisations. This significant reliance highlights the sector’s vulnerability, making it highly dependent on a single government department for operational sustainability. Any changes in government funding could have a significant impact on services. The Motability Foundation is the second-largest funding source at 23%, offering a modest degree of diversification.

Secondary funding sources for Primary Purpose Operators display slightly broader contributions. The Department for Infrastructure remains the largest contributor (30%), followed by the Motability Foundation and the National Lottery Community Fund (20% each). The National Lottery Community Fund, as the third-largest overall funding source (40%), demonstrates its extensive involvement across multiple tiers. Other contributors include Local District Councils, Health and Social Care Trusts, fare income, and generated income, though their roles are comparatively minor.

Figure 2.1: Primary and secondary largest three sources of funding incomes.

Primary and secondary largest three sources of funding incomes



Get the data - Created with Datawrapper

<https://datawrapper.dwcdn.net/8yfav/4/>

In contrast, secondary purpose organisations display a more dispersed funding profile. The Health and Social Care Trusts are the largest single source of funding, supporting 31% of these organisations, followed by the National Lottery Community Fund at 24%. Local District Councils, other central government departments, and the Education Authority each contribute 15%, indicating a more balanced reliance across government and health-related entities. Among secondary funding sources, the National Lottery Community Fund, Local District Councils, and

the Education Authority each account for 29%, reflecting a well distributed base of financial support. Fare income also stands out as the most prominent third largest funding source (29%), complemented by contributions from other central government departments and various local and national bodies.

2.2 Barriers and challenges

Primary providers face critical funding shortages that threaten the sustainability of Community Transport services. As detailed in Section 6 of this report, significant challenges directly related to rising demand and the strain these place on service delivery. All primary operators have reported a substantial increase in demand for Community Transport services, driven by factors such as population growth, escalating community needs, and the reduction in available public transport options. This increase in demand is placing considerable pressure on services, with 19% of operators expressing concerns about their ability to meet the growing need, underscoring the challenge of maintaining and expanding essential transport services. Financial constraints hinder provider's ability to maintain or expand services, while inflation and the cost-of-living crisis have significantly increased operational costs. These challenges jeopardise transport access for disabled and older adults, who rely heavily on these services for mobility. Without increased funding, service reductions could have severe consequences for these vulnerable groups. Balancing rising costs with service continuity is essential for long-term viability.

A major issue is the lack of recognition for Community Transport within broader transport strategies and planning. This oversight marginalises the needs of individuals with disabilities and mobility challenges, exacerbating disparities in service provision. The absence of cross-departmental collaboration further undermines the sector's role in achieving wider government objectives. Currently, funding decisions are driven by budget constraints rather than community needs, forcing providers to seek alternative, often unsustainable, funding sources.

The process of securing funding is particularly burdensome. Larger grants are often inaccessible, leaving providers to compete for smaller, project-specific funds. Short-term grants create uncertainty, hinder long-term planning, and increase competition for limited resources. The lack of capital funding is especially concerning, compounded by single-year budget allocations. For vehicle replacement, the Motability Foundation is one of the few external sources available, but its support is restricted to short term projects. Without stable, multi-year investment, rising maintenance costs compromise service safety and reliability. To ensure long-term sustainability and effectiveness, Community Transport in Northern Ireland urgently requires the development of a sustainable capital funding budget.

Secondary Purpose Operators face a distinct set of funding challenges, including limited access to resources and complex administrative requirements. Strict eligibility criteria often prevent these organisations from securing funds for core expenses, operating costs, and vehicle maintenance. The time, expertise, and effort required for grant applications can be prohibitive, and some operators face additional restrictions, such as funding limited to school-related activities.

This fragmented funding landscape forces secondary operators to rely heavily on volunteer hours to pursue funding opportunities. Many funders exclude running costs and the purchase of affordable second-hand vehicles, leaving operators struggling to cover basic expenses. These barriers significantly hinder effective planning and threaten the viability of secondary transport services, which play a crucial supplementary role in their communities.

Both primary and secondary operators face critical funding challenges that undermine the long-term sustainability of Community Transport, limiting their ability to meet the rising demand for services in their local areas, both now and in the future. Primary operators urgently need stable, multi-year investment to mitigate rising costs and meet the needs of vulnerable groups. Secondary operators require simplified access to sustainable funding streams that cover essential operational costs and vehicle maintenance. Addressing these challenges through collaborative, cross-departmental planning and strategic investment will be crucial to ensuring the continued provision of Community Transport services in Northern Ireland.

Summary

Community Transport operators in Northern Ireland face significant funding challenges that impact service delivery and long-term sustainability. Both primary and secondary operators highlight income stability as their main concern, with funding often concentrated in a few sources. There is a growing demand for services, but financial constraints and rising operational costs threaten the ability to meet community needs, particularly for vulnerable groups including older adults and people with disabilities. Urgent action is required to secure stable, multi-year funding and improve access to resources for both primary and secondary operators.

Key points

- The largest funding sources for Primary Purpose Operators are the Department for Infrastructure, which provides 77% of their funding, and the Motability Foundation, contributing the remaining 23%. In contrast, Secondary Purpose Operators benefit from a more diverse funding base. Their key sources include Health and Social Care Trusts (31%), the National Lottery Community Fund (23%), and Local District Councils and the Education Authority, which collectively account for 15%.
- Rising demand, financial shortages, and inflationary costs make it harder for Primary Purpose Operators to maintain or expand services, compounded by their limited recognition in broader transport planning and reliance on short-term grants.
- Secondary Purpose Operators face challenges with strict eligibility criteria, complex administrative processes, and insufficient funding for core expenses, which hinder effective planning and service viability.
- Both groups urgently need consistent, multi-year funding to cover operational costs, vehicle maintenance, and service expansion to sustain essential Community Transport services.

Case study: The Resource Centre Derry

The Resource Centre Derry has been serving the Derry City community since 1974, providing essential services such as Day Care, Welfare Advice, and Training. It is a cornerstone of support for vulnerable individuals and families, promoting inclusivity and well-being.

The Resource Centre's transportation services are integral to its Meals on Wheels programme and Day Care Centre. These services deliver nutritious meals directly to individuals' homes and enable clients to access the Day Care Centre safely, which reduces isolation and fosters social connections. The transportation programme supports disabled individuals with mobility issues, older adults over the age of 65, people with visual or hearing impairments, and wheelchair users. These services ensure accessibility and significantly improve the quality of life for those who rely on them.

Despite its successes, the Resource Centre faces several critical challenges that threaten its ability to sustain its services. Insufficient and inconsistent government funding places significant operational pressure on the organisation. Additionally, difficulties in recruiting and retaining volunteers hinder the Resource Centre's capacity to grow and meet increasing demand. Rising fuel costs further exacerbate financial strain, particularly on its essential transportation services. These issues underscore the urgent need for stronger support from government bodies and community stakeholders to ensure the Resource Centre can continue its vital work.

The Resource Centre Derry plays a vital role in supporting vulnerable populations. Its services transform lives through inclusivity, care, and empowerment. Addressing the challenges of funding, volunteer shortages, and operational costs is essential to sustaining its impactful work.

Patrick McCarron, Chief Executive Officer

The Resource Centre Derry



3. Staff and volunteers

Community Transport is made possible by the unwavering dedication of volunteers and paid staff, who take on roles ranging from back office support to leadership and driving. For those involved, it's not just a job: it's a calling, driven by a desire to make a meaningful difference, support those in need, and contribute to their local communities.

However, recruiting and retaining drivers is becoming an increasing challenge. The interpretation of the 2018 D1 licensing requirement within Northern Ireland places additional time and financial constraints for drivers to obtain a full Category D1 license. Paradoxically, this has made community trained drivers highly attractive to private and public sector employers, who can offer better pay, benefits and job stability. These employment disparities often undermine driver retention in Community Transport, particularly as demand for staffing grows in rural areas of Northern Ireland.

3.1 Paid Staff

The distribution of paid staff by role provides insight into the operational priorities of Community Transport operators, with the majority of staff employed in driving roles. All Primary Purpose Operators employ paid staff, reflecting a structured and strategic approach to workforce management within the sector.

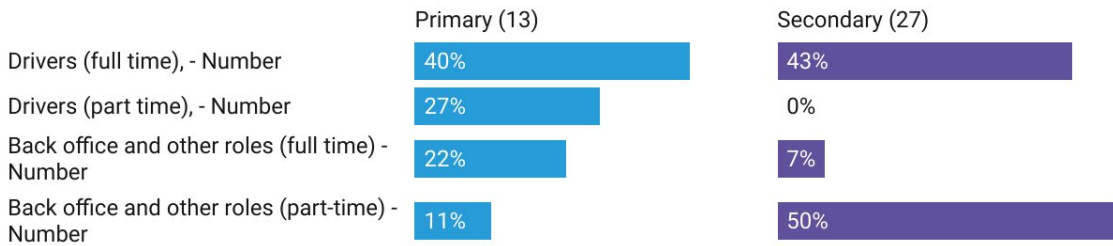
Licensing requirements present a significant recruitment challenge for Community Transport in Northern Ireland, driving up costs and requiring substantial time for drivers to obtain a full Category D1 license. Although driver and operator licensing in Northern Ireland is based on EU laws still applied in the UK, the regulatory approach in Great Britain is notably less stringent. In contrast, the Department for Infrastructure (DfI) in Northern Ireland has adopted a stricter interpretation, resulting in more rigorous licensing requirements which is posing a distinct impact on the sector. Specifically, DfI mandates that all "paid drivers" must hold a full Category D or D1 license, defining "paid drivers" as those receiving compensation beyond out-of-pocket expenses. This has made recruiting and retaining drivers increasingly difficult.

Driving roles dominate the workforce, with 40% of staff employed as full-time drivers, averaging five drivers per organisation. Part-time drivers account for 27% of the workforce, with an average of four drivers per organisation. Administrative and support roles represent 22% of full-time staff, averaging three employees per organisation, and 11% of part-time staff, averaging two employees per organisation.

This staffing structure highlights a strong focus on full-time positions, particularly for drivers, which is vital for ensuring reliable and consistent transport services, especially in rural areas where accessibility can be more challenging. The significant proportion of full time administrative staff also highlights the importance of stable back office support in facilitating smooth operations and maintaining high service standards. At the same time, part time roles provide flexibility, enabling organisations to manage resources effectively while continuing to deliver essential transport services.

Figure 3.1: Staff in 2023/24.

Paid Staff 2023/24



Created with Datawrapper

<https://datawrapper.dwcdn.net/wFmvW/3/>

In contrast, Secondary Purpose Operators have a different staffing structure. Forty three per cent of their employees work as full-time drivers, with no part-time drivers. A significant portion of their workforce 50% is engaged in administrative and support roles, though only 7% of these are full time positions.

This staffing pattern indicates that Secondary Purpose Operators rely more heavily on administrative support, which likely reflects the broader range of activities they are involved in, with transport serving as a secondary service rather than the main focus.

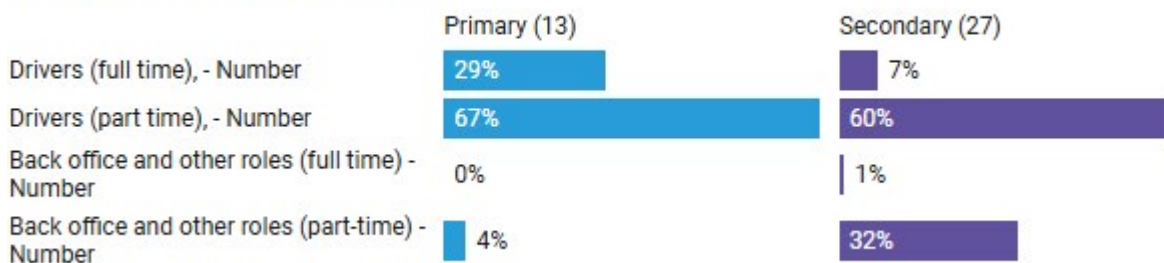
3.2 Volunteers

Volunteer roles within CTOs highlight clear differences between Primary and Secondary Purpose Operators. Primary Purpose Operators rely heavily on volunteers for driving roles, with 67% of their volunteers engaging as part-time drivers and 29% as full-time drivers. Only 4% of volunteers in these organisations are involved part-time in back-office or support roles, and there are no full time volunteers in administrative positions.

This heavy reliance on volunteer drivers reflects the primary focus of these organisations on delivering transport services.

Figure 3.2: Volunteers in 2023/24.

Volunteers in 2023/24



Created with Datawrapper

<https://datawrapper.dwcdn.net/MLT2T/2/>

Secondary Purpose Operators, on the other hand, exhibit a more varied volunteer structure. While 60% of their volunteers are part-time drivers, 32% are engaged part-time in back-office or support roles, and 1% hold full-time positions in these areas. This higher proportion of non-driving roles reflects the broader mission of Secondary Purpose Operators, where transport services are just one part of a wider organisational purpose that requires administrative and support functions.

Overall, Primary Purpose Operators focus their volunteer efforts almost exclusively on transport service delivery, while Secondary Purpose Operators maintain a more balanced volunteer structure to support a wider range of activities. This contrast highlights the differing priorities and operational needs of the two types of organisations. However, data on volunteer hours was not included in this research. It should be an important aspect to consider in future iterations or areas for further exploration.

3.3 Volunteer recruitment

The findings on volunteer recruitment over the past year reveal contrasting trends between Primary and Secondary Purpose Operators. Sixty two per cent of Primary Purpose Operators reported an increase in volunteer numbers, indicating successful recruitment efforts or growing community awareness of the vital role Community Transport plays. However, it was emphasised that effective volunteer development requires dedicated time and resources to ensure volunteer flexibility and long-term sustainability.

In contrast, only 20% of Secondary Purpose Operators saw an increase in volunteers, while nearly half (47%) experienced no change. This suggests that Secondary Purpose Operators may be prioritising the maintenance of a steady volunteer base rather than actively expanding it, likely due to differing organisational needs and resource constraints.

However, both groups have faced challenges in volunteer retention and recruitment. Twenty three per cent of Primary Purpose Operators and 27% of Secondary Purpose Operators reported a decline in volunteer numbers. This highlights the ongoing need for targeted and sustained recruitment strategies to ensure that service levels are maintained.

Figure 3.3- Volunteer Recruitment and Retention.

Has there been any change in volunteer recruitment for your organisation in the past year?



Created with Datawrapper

<https://datawrapper.dwcdn.net/hzSxi/3>

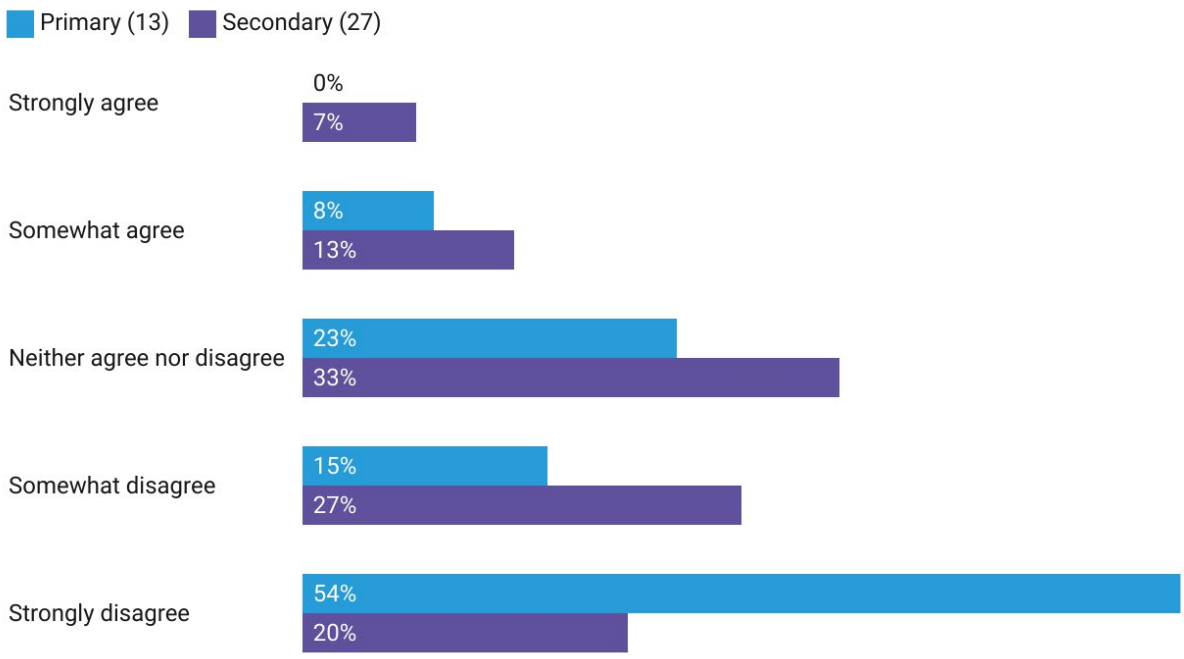
3.4 Volunteering and demand

Figure 3.4 points out the difference in the levels of volunteers availability between Primary and Secondary Purpose Operators in the Community Transport sector, with Primary Purpose Operators facing a more significant shortfall. Fifty four per cent of Primary Purpose Operators strongly disagree that they have enough volunteers to meet service demands, indicating a substantial gap. An additional 15% somewhat disagree, emphasising the need for more volunteer support. Only 8% somewhat agree that their volunteer numbers are adequate, and none strongly agree, reflecting widespread concerns about volunteer availability and its impact on service delivery.

In contrast, Secondary Purpose Operators report a less severe shortage. While 20% strongly disagree and 27% somewhat disagree that they have sufficient volunteers, the responses are more balanced overall. A small proportion, 7% strongly agree and 13% somewhat agree, suggest they have enough volunteers. This indicates that some Secondary Purpose Operators face less pressure, likely due to their broader operational scope or different recruitment approaches.

Figure 3.4- Levels of volunteering to meet demand.

Do you feel your organisation currently has enough volunteers to meet the demand for your services?



Created with Datawrapper

<https://datawrapper.dwcdn.net/aOBeO/3/>

3.5 National Living Wage Employer



Wage policies in Northern Ireland are fundamental to economic stability, shaping both the quality of life for workers and the resilience of businesses. The National Minimum Wage and National Living Wage establish legally enforced pay thresholds, ensuring a basic income standard for employees. As of April 2024, the National Living Wage for employees aged 21 and over stood at £11.44 per hour, reflecting governmental efforts to address rising living costs. While this rate is designed to reflect the cost of living and support workers in maintaining a basic standard of living, recruitment challenges remain a significant concern. The Real Living Wage, determined independently by the Living Wage Foundation, goes further by calculating rates based on actual living expenses this would further impact the sector.

All of the Primary Purpose Operators currently comply with the National Living Wage requirements and demonstrate a clear commitment to promoting economic fairness, with aspirations to exceed these standards. However, despite these intentions, they continue to face significant challenges in balancing fair but attractive pay with operational sustainability.

In contrast, Secondary Purpose Operators display varied levels of adherence, reflecting the diverse nature of their organisations. Of the 30 Secondary Purpose Operators surveyed, only 12 responded to the question on wage policies. Among these, 58% reported being Living Wage employers, while 42% did not confirm compliance. This disparity likely stems from differences in organisational structures and priorities. Many Secondary Purpose Operators rely heavily on volunteers or lack paid staff altogether, limiting their capacity to formally adopt living wage policies.

Community Transport employers remain committed to fair pay. Ensuring fair wages is essential for maintaining a motivated workforce and delivering high-quality services. However, the additional financial burden associated with adopting the Real Living Wage, a voluntary standard determined by the Living Wage Foundation based on actual living costs, presents significant challenges. Balancing these aspirations with financial realities will be critical for sustaining fair wage practices while maintaining operational viability

Summary

Community Transport plays a vital role in supporting local communities across Northern Ireland, relying on both paid staff and volunteers to deliver essential services. Despite their dedication, the sector faces growing challenges, including the high costs of driver training, competition from better paying employers, and a shortage of volunteers, particularly among Primary Purpose Operators. Staffing structures differ significantly between Primary and Secondary Purpose Operators, reflecting their operational priorities. Efforts to comply with wage standards are evident, with Primary Purpose Operators adhering to the National Living Wage, but financial pressures remain a barrier to adopting more competitive pay policies, such as the Real Living Wage. Without effective solutions, these challenges pose a serious risk to the long-term sustainability of Community Transport services, jeopardising the vital support they provide to vulnerable communities.

Key points

- The 2018 D1 licensing interpretation in Northern Ireland has increased time and cost barriers for driver training, making community trained drivers more attractive to sectors offering better compensation and benefits.
- Primary Purpose Operators employ a higher proportion of full-time drivers (40%) compared to Secondary Purpose Operators, who have a larger focus on administrative functions (50% in support roles).
- A critical shortage of volunteers is reported by 54% of Primary Purpose Operators, while 47% of Secondary Purpose Operators face similar shortages.
- While all Primary Purpose Operators adhere to the National Living Wage, they face financial pressures that hinder adopting the Real Living Wage, whereas only 58% of Secondary Purpose Operators comply, reflecting the diversity in organisational structures.



South Antrim Community Transport

Case Study: Volunteer Now

Volunteers' Role in Mission and Operations

The volunteers at Volunteer Now play an immense role in supporting our organisation's mission and operations. One section of our work (Community Projects) is funded by the Belfast Health & Social Care Trust specifically to support older people across Belfast. We do this in a range of ways, all of which require support from volunteers. We offer a befriending, shopping support and transport scheme to meet identified needs for the older population.

Our volunteer driving scheme provides transport (volunteers use their own car) to and from medical appointments for isolated older people who may require additional support in order to attend. Volunteers give not only their time, but their skills and qualities (such as patience, kindness) to reassure these people and ensure they are supported when attending potentially stressful medical appointments.

We are also supported by the SEHSCT to deliver a driving service for looked after children, this involves volunteer drivers taking children to and from school, contact visit or summer scheme / after school activity. Volunteers use their own car to provide this service.

Significance of Volunteer Services

Volunteers are able to offer a different perspective to many service providers, and the fact they have 'chosen' to be there is significant. This motivation allows them to be that bit more relatable to those who we support. Volunteer-led services are crucial in communities and are often combatting real and emerging needs at a fast pace. Volunteers work across society helping those in need and are important in almost every setting, addressing almost every challenge.

Challenges in Recruiting and Retaining Volunteers

We at Volunteer Now face a range of challenges which are not unique to us. Due to changes in society caused by the cost-of-living crisis and the covid-19 pandemic, the demographic of volunteers has shifted. A lot of stalwart volunteers took a step back and didn't return, and those who did return or decided to volunteer for the first time often offered less time due to their life circumstances. Volunteers also prefer less bureaucracy in the recruitment process and given our roles (supporting adults at risk), there are unavoidable and important processes we must follow, e.g. Access NI and induction. As a result, we experience a high level of volunteer dropout during the recruitment process.

Transport Services and who benefits from them

Volunteer Now provide transport to isolated older people across the Belfast council area. We transport people to medical appointments and health and wellbeing groups/classes on a regular, semi-regular or ad-hoc basis. People are referred to us by social workers and we support those who are struggling to attend for a range of reasons including: anxiety

around appointments; limited mobility meaning longer periods of standing waiting for taxis; struggles coordinating their diary, all of which may lead to missed appointments.

We also have a separate driving service for looked after children in the Ards and North Down area, the children are referred to our scheme through a social worker and we would work in partnership with foster carers, social workers and volunteers to deliver the service.

Challenges in Maintaining and Expanding Transport Services

As an organisation, we are constantly receiving more referrals, and our output continues to grow. We do rely heavily on our volunteers and their availability, with service capacity directly proportionate to them.

Two aspects we identify as limiters to our capacity are:

1) Staff and core funding: Our scheme could continue to grow, and the need is clearly apparent. However, due to limited staff and resources, our ability to manage and coordinate a scheme is at its maximum capacity.

2) Fuel costs: For our Belfast driving scheme for older people, the service users making payment for the journeys at a rate of 45p per mile. This is to reimburse volunteers for their out of pocket expenses for fuel. However, these costs aren't fairly reflecting the increased fuel costs or wear and tear of a volunteer drivers car, due to the cost of living crisis we are currently facing this can be prohibitive for people coming forward to volunteer.

Memorable Success Story

We hear countless positive stories on a weekly basis from both volunteers and service users. There is one lady who had been missing several appointments and was referred to us by a social worker. After meeting her, it became clear that she was really anxious when it came to getting taxis, as she had been left waiting on her feet for prolonged periods and became increasingly scared of falling. After assessing her for our service, we put in place measures to restrict the amount of standing time she would have when waiting to be collected. Our driver was able to phone 5 minutes ahead and then she could come to the front door and be picked up there. Now, the lady attends appointments at least each month in a range of different hospitals and has become very close to two of our volunteer drivers. At Christmas, she wrote them both Christmas cards and expressed her gratitude for all they do for her. This shows not only the practical benefits of our support, but also the power of the relationships built between our drivers and service users!

For our Ards and North Down service, some of the volunteer drivers who transport the same child on a regular basis will have quizzes and games during their journey, volunteers enquire how their school day went so there is great interaction on the school journey and friendships are built.

Lindsay Armstrong, Community Projects Manager

[Volunteer Now](#)



4. Services

Community Transport services in Northern Ireland play a vital role in supporting passengers whose needs are unmet by existing transport options or who are unable to travel using the public transport network. These services aim to provide accessible and reliable transport for individuals who might otherwise feel isolated or experience barriers to travel.

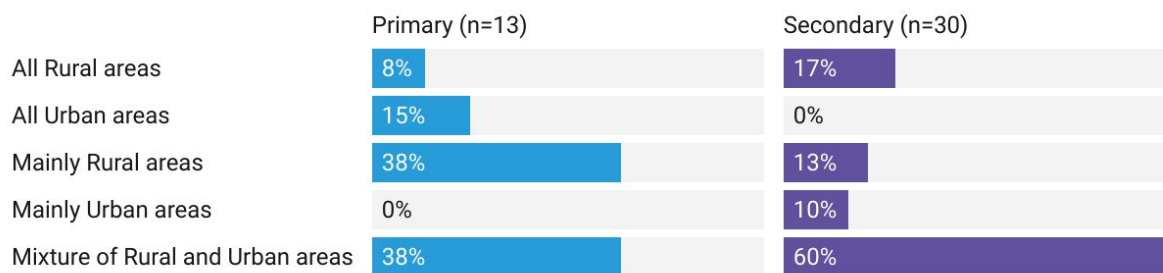
The Community Transport model is fundamentally person centred, focusing strongly on addressing diverse needs and ensuring accessibility for all. To meet the varying requirements of the populations they serve, CTOs offer a broad range of services. These can include group hire and door-to-door transport, with the type of service tailored to the unique needs of the local community and the geographic area in which each CTO operates. This adaptability allows services to effectively respond to local demands.

4.1 Rural/urban mix

The geographic focus of services provided by primary and secondary providers highlights the differences in their operations across rural, urban, and mixed areas. These patterns reflect the diverse nature of the communities served by Community Transport and the ongoing challenges in clearly defining what constitutes a rural area.

Figure 4:1: Areas of operation.

Area of Operation



Created with Datawrapper

<https://datawrapper.dwcdn.net/06ned/3/>

Primary providers are most active in predominantly rural areas, with 38% of their services based in these regions. In comparison, only 13% of secondary providers focus on predominantly rural areas, indicating a lower level of engagement. Meanwhile, no primary providers operate in predominantly urban areas, although 10% of secondary providers are active in these locations.

Additionally, 8% of primary providers and 17% of secondary providers operate exclusively in rural areas, demonstrating a relatively limited focus on entirely rural settings. In urban areas, 15% of primary providers focus solely on these regions, while secondary providers have no operations confined exclusively to urban areas.

Mixed rural-urban areas are the primary focus for both types of providers, with secondary providers concentrating most of their efforts there. Overall, primary providers tend to prioritise rural and mixed areas, while secondary providers maintain a more balanced distribution, with significant activity in mixed and urban-adjacent regions.



4.2 Service type

Figure 4.2 highlights the differences in transportation services provided by Primary and Secondary Purpose Operators, illustrating clear distinctions in the types of services they offer.

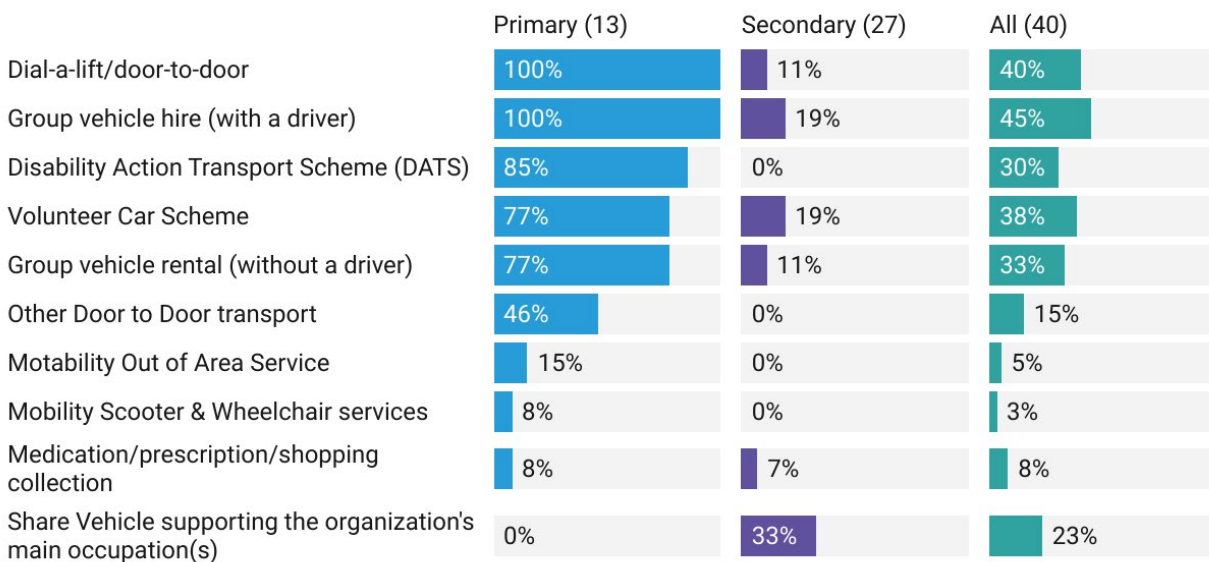
Across all organisations in the sector, the most common services are Group vehicle hire with a driver (45%) and Dial-a-lift/door-to-door transport (40%). Primary Purpose Operators are highly focused on transport services, with all 13 organisations (100%) offering both Dial-a-lift/door-to-door transport and Group vehicle hire with a driver. These services are essential for providing flexible and accessible transport to individuals. The majority of Primary Purpose Operators (85%) also offer the Disability Action Transport Scheme (DATS), demonstrating their strong commitment to supporting people with disabilities. Furthermore, 77% of these organisations provide Volunteer Car Schemes and Group vehicle rental without a driver, expanding their range of services.

Other services such as “Other Door to Door” and the Motability Out of Area Service are less common, with 46% and 15% of organisations, respectively, offering these options.

In contrast, Secondary Purpose Operators offer a broader range of services, though with a reduced focus on transport. Only 11% provide Dial-a-lift/door-to-door transport and Group vehicle hire with a driver, reflecting their lower emphasis on core transport functions. Around 19% of Secondary Purpose Operators offer Volunteer Car Schemes. Notably, 33% of Secondary Purpose Operators use shared vehicles to support their primary organisational goals, highlighting that transport is often a secondary function for these organisations.

Figure 4.2: Percentage of primary and secondary purpose CTOs offering different types of services.

Service type



Created with Datawrapper

<https://datawrapper.dwcdn.net/PNrQu/2/>

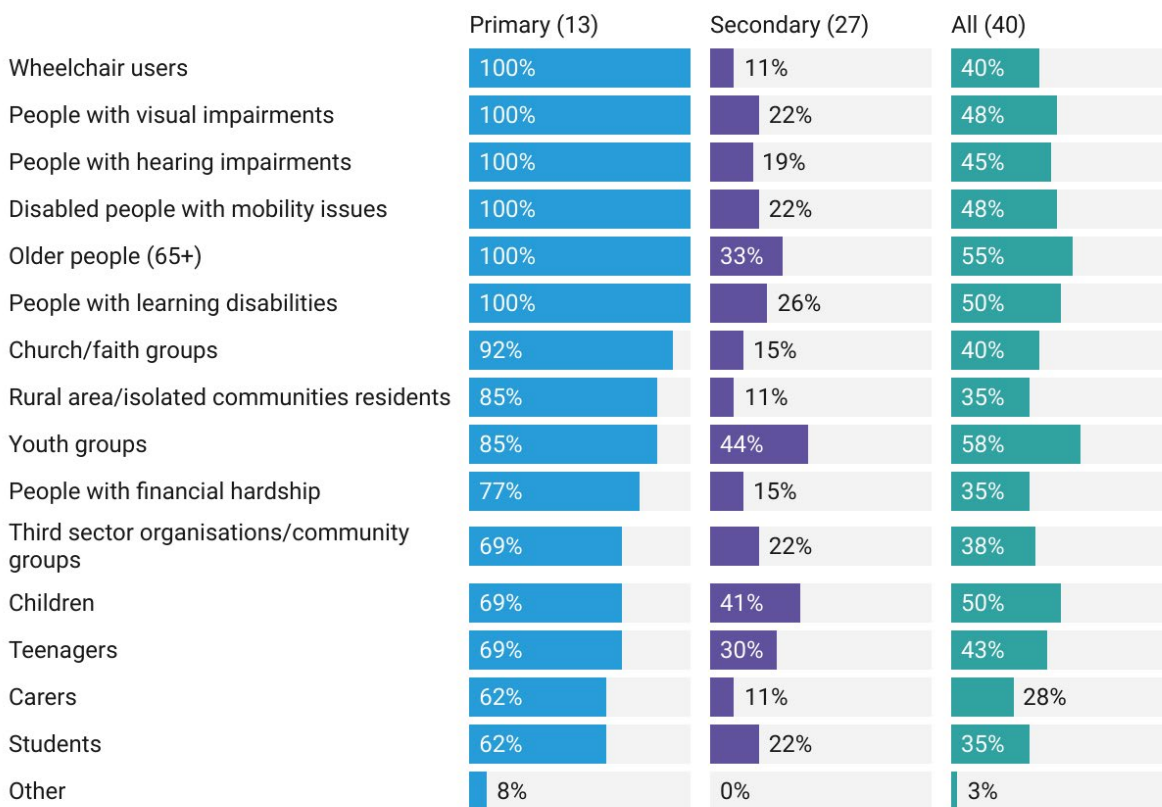
4.3 Passengers

Figure 4.3 provides an overview of the groups served by Primary and Secondary Purpose Operators over the past year, highlighting notable differences in the demographics they support.

Across all organisations, the most frequently served groups are older people (55%), youth groups (58%), and individuals with learning disabilities (50%). However, there is a clear distinction between Primary and Secondary Purpose Operators in terms of the level of service provided to individuals with accessibility needs.

Figure 4.3: Passenger types by Primary and Secondary Purpose Operators.

Passengers



Created with Datawrapper

<https://datawrapper.dwcdn.net/K5hKo/1/>

Primary Purpose Operators play a key role in supporting groups that require specialised transport, with a strong focus on individuals with specific mobility and accessibility needs. All 13 Primary Purpose Operators provide transportation for wheelchair users, people with visual and hearing impairments, and individuals with mobility-related disabilities. These organisations are also dedicated to supporting older people (aged 65+), people with learning disabilities, and youth groups, with 100% of Primary Purpose Operators offering services for these groups. Furthermore, 85% of Primary Purpose Operators provide transport for residents of rural or isolated communities, highlighting their commitment to meeting the needs of vulnerable populations. Services for people experiencing financial hardship (77%) and third sector/community groups

(69%) are also provided by a significant proportion of Primary Purpose Operators.

Secondary Purpose Operators, by contrast, serve a more varied range of service users, but with a less concentrated focus on individuals with mobility or accessibility needs. For example, only 11% of Secondary Purpose Operators transport wheelchair users, compared to 100% of Primary Purpose Operators. Similarly, the proportion of Secondary Purpose Operators serving individuals with visual impairments (22%), hearing impairments (19%), and those with mobility issues (22%) is significantly lower than for Primary Purpose Operators.

However, Secondary Purpose Operators support a broader range of groups, particularly youth groups (44%) and children (41%). They also provide transportation for teenagers (30%), students (22%), and carers (11%).

Overall, the data illustrates the differing priorities of Primary and Secondary Purpose Operators. Primary Purpose Operators focus on providing transport for individuals with specific mobility and accessibility needs, while Secondary Purpose Operators offer a broader, less specialised service to a variety of community groups.



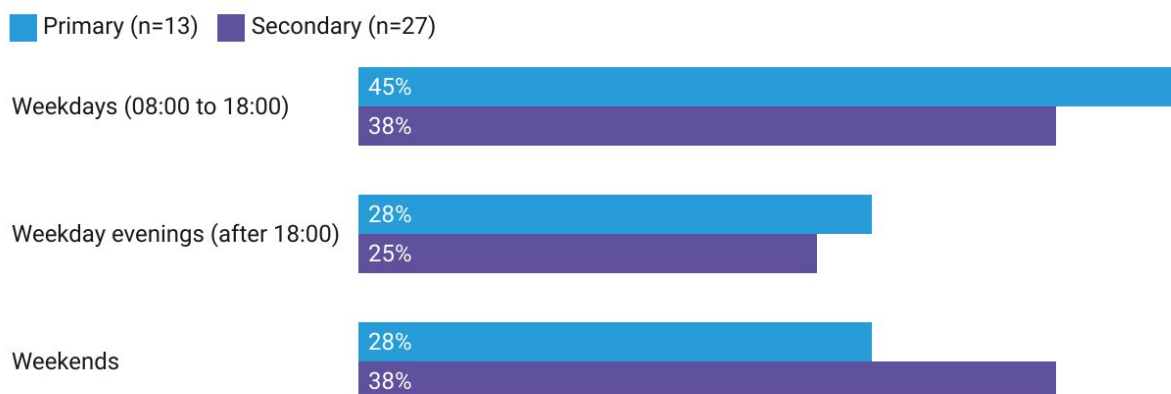
Out & About Community Transport

4.4 Times of operation

Primary Purpose Operators primarily operate during weekdays, with 45% offering services between 08:00 and 18:00, indicating a focus on providing transport during standard working hours. A smaller proportion, 28%, extend their services into weekday evenings after 18:00, while another 28% provide transport during weekends. These figures suggest a degree of flexibility in meeting customer needs outside traditional working hours.

Figure 4.4: Service times by Primary and Secondary Purpose Operators.

Service times



Created with Datawrapper

<https://datawrapper.dwcdn.net/KLZBu/2/>

In contrast, Secondary Purpose Operators demonstrate a more varied approach to service times. While 38% offer transport during weekdays from 08:00 to 18:00, similar to Primary Purpose Operators, a larger share of 38% focus on providing services during weekends, indicating a stronger emphasis on meeting demand during this period. However, fewer Secondary Purpose Operators (25%) offer evening services after 18:00. In summary, both Primary and Secondary Purpose Operators prioritise weekday daytime services, but Secondary Purpose Operators are more likely to extend their services into weekends, reflecting a broader operational timeframe.

Summary

Community Transport in Northern Ireland is vital for providing accessible transportation to underserved groups, including older adults, individuals with disabilities, and those in rural areas. Primary Purpose Operators focus on specialised services like door-to-door transport and group vehicle hire, catering primarily to individuals with mobility challenges, including wheelchair users, older adults, and those with hearing or visual impairments. They also provide services for rural and isolated communities. Secondary Purpose Operators offer a wider variety of services, including Volunteer Car Schemes, targeting community groups like youth, students, and carers. While Primary Purpose Operators emphasise accessibility for individuals with specific needs, Secondary Purpose Operators support a broader demographic. Both operators adapt their service times to meet local demands, with Primary Purpose Operators mostly operating on weekdays and Secondary Purpose Operators providing weekend services for greater flexibility.

Key points

- Primary Purpose Operators are more focused on rural areas, while Secondary Purpose Operators have a more varied presence across rural, urban, and mixed regions.
- Primary Purpose Operators primarily serve individuals with mobility and accessibility needs, such as wheelchair users and older adults, while Secondary Purpose Operators cater to a wider variety of community groups, including youth and students.
- Both types focus on weekday daytime services, but Secondary Purpose Operators are more likely to offer services on weekends, while Primary Purpose Operators extend services into weekday evenings.

Case study: Down Armagh Rural Transport

In August of last year, John from Banbridge faced an unexpected and life-changing event. He developed a serious infection, sepsis, which rapidly spread through his body and putting him at serious risk.

During a visit, John's sister found him unresponsive and quickly called for an ambulance. John woke up more than two weeks later in the high dependency unit of the hospital, facing a devastating reality: both of his legs had been amputated above the knee.

The months that followed were a whirlwind of adjustment and recovery, with John spending four months in various hospitals before being discharged.

"It has been a very big adjustment, Many a time I wake up in the morning, and completely forget that I don't have lower legs any more."

However, the 49-year-old, who was always fiercely independent, is slowly coming to terms with the fact that he now relies on others to an extent he never had to before.

One of John's most significant challenges was transportation, this was alleviated through the Down Armagh Rural Transport (DART) service. Thanks to its Access Plus scheme, funded by the Motability Foundation, John has been able to attend crucial medical appointments free of charge. John first learned about DART through a friend of his sister, who works as a nurse.

For John, the service has been indispensable:

"I wouldn't be able to get to these appointments without it because I couldn't afford it. It's not easy getting transport when you're in a wheelchair. I don't know what I would do without DART,"



5. Vehicles

Vehicles are a fundamental component of Community Transport operations, playing a vital role in ensuring the delivery of reliable services. Whether owned, leased, or otherwise managed by CTOs the financial burden of purchasing, operating, maintaining, and replacing these vehicles has increased significantly in recent years.

A recurring theme identified in the survey was the urgent need to replace ageing vehicles and modernise fleets. This issue is further compounded by growing discussions about the integration of electric vehicles (EVs). While EVs offer a promising opportunity for sustainable transport, concerns remain about their current suitability within the Community Transport delivery model.

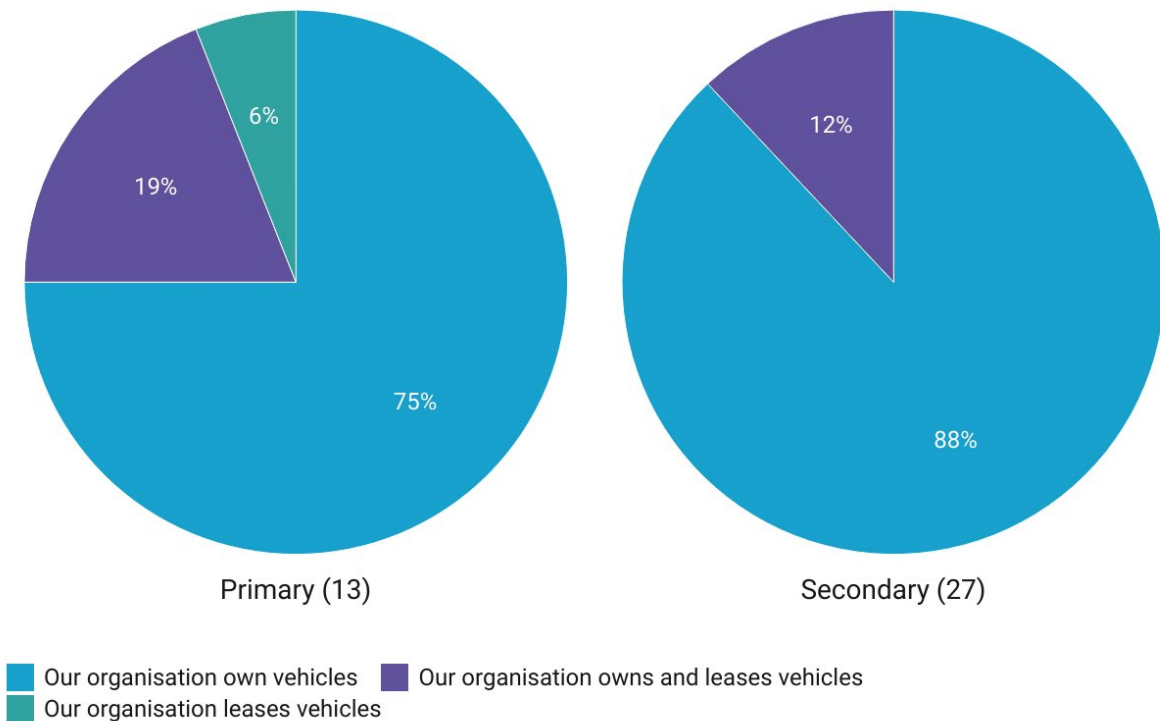
CTOs emphasised the need to evaluate how EVs can be adapted to meet specific service requirements. Additionally, they highlighted the importance of strategic planning for future transitions to align with both environmental and operational goals.

5.1 Vehicle ownership

The data highlights distinct approaches to vehicle ownership and leasing among Primary and Secondary Purpose Operators, with both groups showing a clear preference for outright ownership.

Figure 5.1: Vehicles ownership by Primary and Secondary Purpose Operators.

Vehicle Ownership



Created with Datawrapper

<https://datawrapper.dwcdn.net/gefjn/2/>

Primary Purpose Operators predominantly own their vehicles, with 75% managing their fleets through outright ownership. An additional 19% utilise a combination of owned and leased vehicles, demonstrating some flexibility in meeting operational needs. However, only 6% rely exclusively on leasing, indicating that outright ownership remains the preferred option within this group, likely due to the stability and long term cost management it offers.

Secondary Purpose Operators show an even stronger reliance on vehicle ownership, with 88% owning their vehicles outright. A smaller share, 12%, manage their fleets through a mix of ownership and leasing, while none rely solely on leasing. This strong preference for ownership among Secondary Purpose Operators aligns with their operational requirements and reflects the reduced administrative complexity associated with owning vehicles outright.

In summary, vehicle ownership is the dominant model for both Primary and Secondary Purpose Operators, highlighting its advantages in cost-efficiency and operational control. While Primary Purpose Operators show some flexibility through mixed ownership and leasing, leasing alone is rare across the sector. These patterns emphasise the importance of stable, long-term fleet management strategies for Community Transport operators. Equally, it is important to note that stable, multi-year funding would enable vehicle leasing, offering greater financial flexibility and long-term planning, which is not possible under the current funding model.



Lagan Valley Community Transport

5.2 Types of vehicles

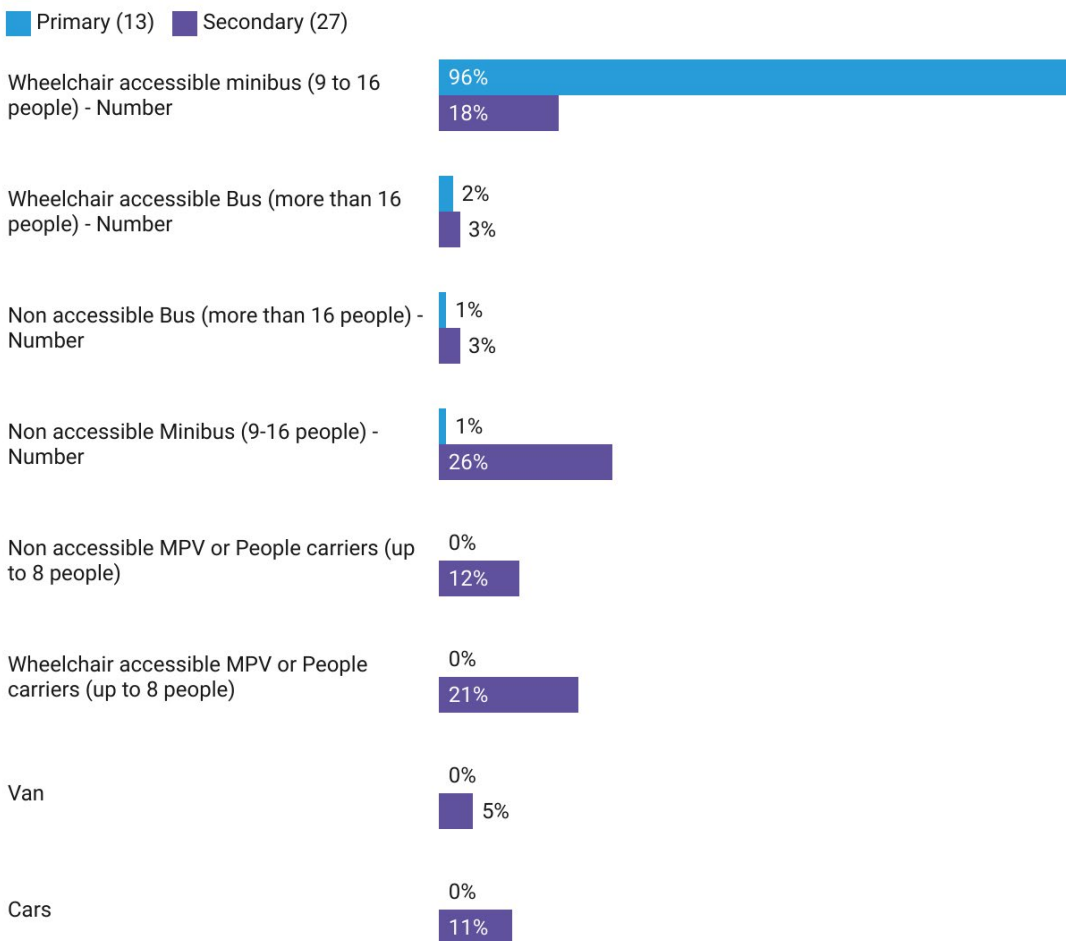
The vehicle fleets of Primary and Secondary Purpose Operators highlight differences in their operational priorities and service models.

Primary Purpose Operators prioritise accessibility, with 96% of their fleet consisting of wheelchair-accessible minibuses designed for 9 to 16 passengers. This strong focus underscores their commitment to providing inclusive transport solutions for individuals with mobility challenges. Other vehicle types are nearly absent from their fleets, with wheelchair-accessible buses (2%) and non-accessible minibuses (1%) playing a minimal role. Notably, Primary Purpose Operators report no ownership or leasing of MPVs, cars, or vans, reflecting their specialised approach to transport services centred on accessibility and group transport.

Secondary Purpose Operators, in contrast, maintain a more diverse vehicle fleet to support their broader range of services. While only 18% of their fleet consists of wheelchair-accessible minibuses, they employ a variety of other vehicles, including non-accessible minibuses (26%), wheelchair-accessible MPVs (21%), and non-accessible MPVs (12%). Additionally, cars (11%) and vans (5%) are part of their fleet, indicating flexibility in addressing a wide range of transport needs—many of which do not require wheelchair accessibility.

Figure 5.2: Vehicles type by Primary and Secondary Purpose Operators.

Types of Vehicles



<https://datawrapper.dwcdn.net/8yajn/1/>

5.3 Fuels

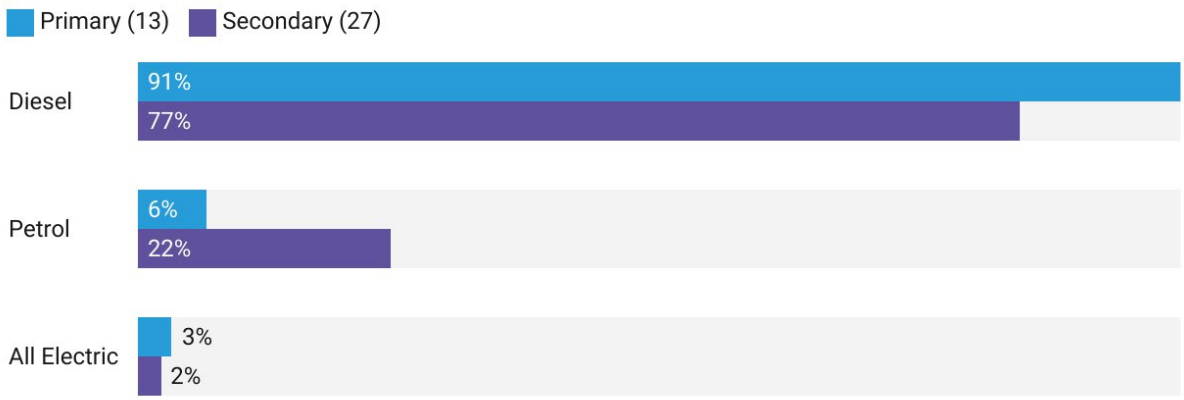
Diesel remains the primary fuel type for CTOs. For Primary Purpose Operators, diesel powers 91% of their vehicles. This heavy reliance is largely due to the efficiency and power of diesel engines, which are well-suited to the demands of accessible and group transport services. Petrol vehicles account for a minimal 6% of their fleet, while electric vehicles make up just 3%. The limited presence of electric vehicles highlights that the transition toward sustainability is still in its early stages, hindered by challenges such as limited range, high upfront costs, and gaps in infrastructure.

Secondary Purpose Operators, on the other hand, display a more varied fuel mix, although diesel remains dominant at 77%. Petrol vehicles represent 22% of their fleet, reflecting a broader mix of smaller and more versatile vehicles that are frequently employed by these operators. Electric vehicles make up only 2% of their fleet, indicating similar barriers to adoption as those faced by Primary Purpose Operators.

In summary, diesel continues to dominate the fuel profiles of both Primary and Secondary Purpose Operators, highlighting its role as the foundation of current service delivery models. However, the minimal presence of electric vehicles underscores the challenges that must be addressed to enable a transition to greener and more sustainable transport options. Overcoming these obstacles will be essential as the Community Transport sector works toward more environmental sustainability including decarbonisation, while continuing to meet the needs of its users.

Figure 5.3: *Vehicle fuel type by Primary and Secondary Purpose Operators.*

Vehicle Fuel type



Created with Datawrapper

<https://datawrapper.dwcdn.net/lccjE/3/>

5.4 Barriers to electric vehicles

Electric Vehicle (EV) adoption in Community Transport remains limited, with only a small proportion of providers incorporating EVs into their fleets primarily in urban areas where charging infrastructure is more developed. The transition to EVs faces several challenges, including insufficient infrastructure, limited battery range, and high costs.

Key barriers to adoption include a lack of local charging facilities, both public and depot based, and financial strain stemming from high upfront costs and limited funding. Additionally, the availability of suitable EV models for the specific needs of Community Transport is a concern, exacerbated by supply chain issues and uncertainty about the timing of the transition.

Operational hurdles add further complexity to the shift. These include the need to replace multiple diesel vehicles with a similar number of EVs, challenges in managing recharging logistics. Particularly in relation to drivers who start and finish their shifts at home, alongside concerns about the reliability of current EV models. Moreover, a shortage of qualified maintenance personnel adds to these challenges.

While there is support for the integration of EVs, significant obstacles persist. Overcoming these barriers will require targeted investment, improved infrastructure, and better coordination across the sector to ensure that EV adoption aligns with the practical and operational needs of Community Transport.



Disability Action

5.5 Purchasing new vehicles

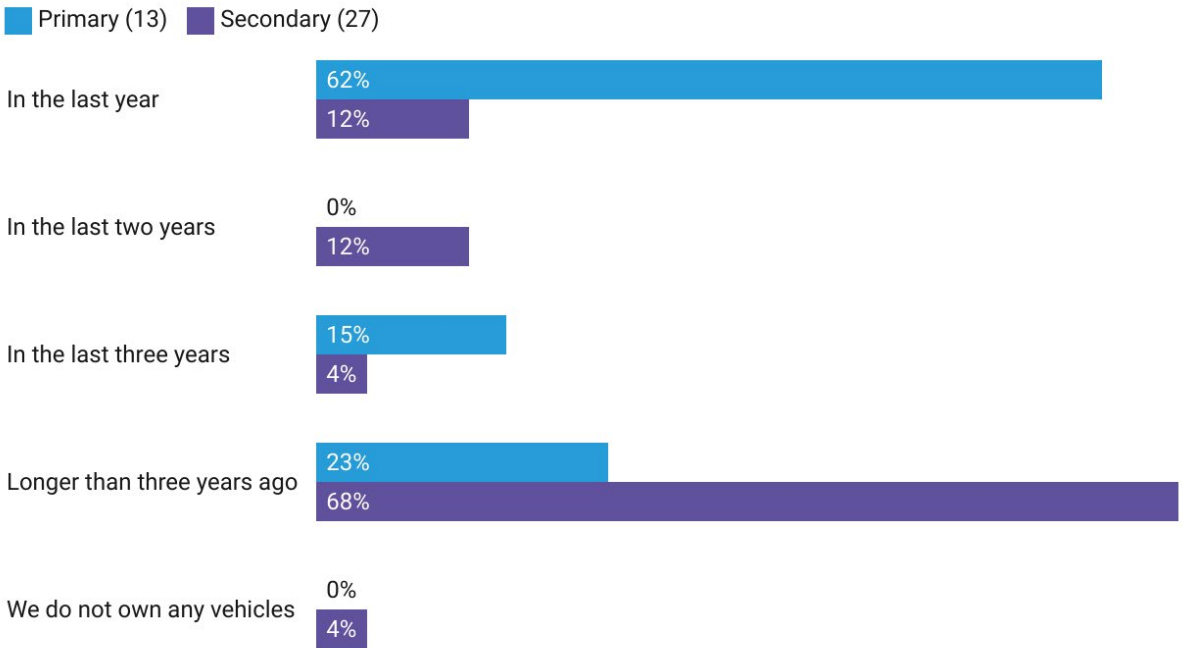
Figure 5.4 highlights a clear contrast in the timing of vehicle acquisitions between Primary and Secondary Purpose Operators. A significant majority of Primary Purpose Operators (62%) have purchased or leased a new vehicle within the past year, indicating recent investment in their fleets. However, none of the Primary Purpose Operators reported purchasing or leasing vehicles in the last two years, while 15% made acquisitions within the past three years.

In contrast, Secondary Purpose Operators exhibit a different pattern. A substantial proportion (68%) last purchased or leased a vehicle over three years ago. Only a small percentage (12%) have acquired new vehicles within the past year, and a similar proportion (12%) did so within the last two years. This suggests that Secondary Purpose Operators may operate with older fleets or rely more on their existing vehicles.

The data reveals that Primary Purpose Operators are more proactive in acquiring new vehicles, likely to meet the ongoing demand for accessible and reliable transport services. Conversely, Secondary Purpose Operators, with a lesser focus on transport services, may face constraints in updating their vehicle fleets. These limitations could impact their operational efficiency and service delivery over time.

Figure 5.4: Timeframes for new vehicle purchases.

Purchasing new vehicles



Created with Datawrapper

<https://datawrapper.dwcdn.net/nBJhW/1/>

5.6 Financing new vehicles

Figure 5.6 offers valuable insights into how CTOs finance the purchase of new vehicles, highlighting key differences between Primary Purpose Operators and Secondary Purpose Operators.

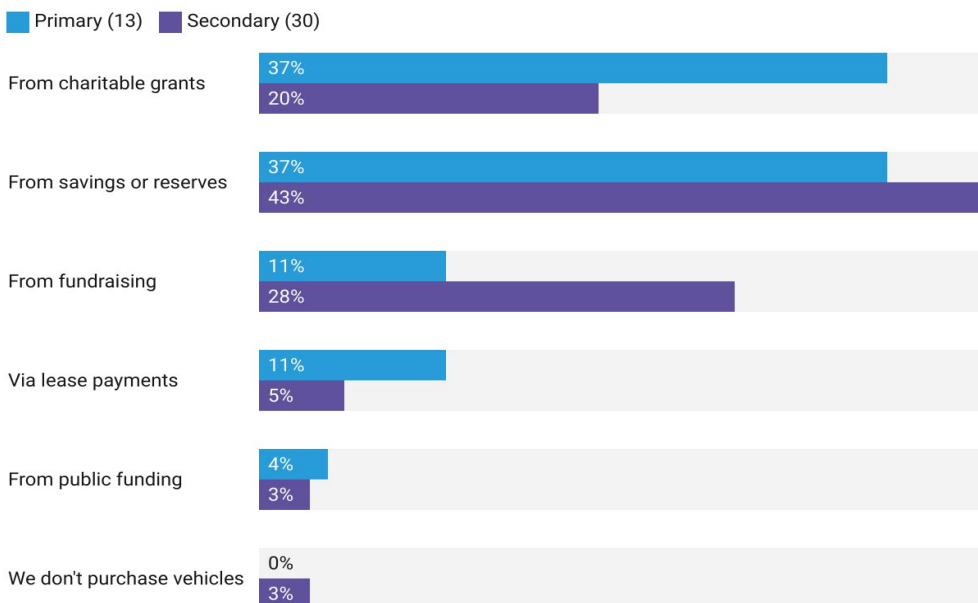
For Primary Purpose Operators, charitable grants and savings or reserves are the most common funding sources, each accounting for 37% of responses. This indicates that Primary Purpose Operators rely heavily on external grants and their own financial reserves to finance vehicle purchases. Additionally, fundraising contributes to 11% of their vehicle funding, suggesting that some operators also turn to public donations as an extra financial resource.

In contrast, Secondary Purpose Operators show a greater dependence on savings or reserves, with 43% selecting this option compared to 37% of Primary Purpose Operators. This suggests that Secondary Purpose Operators may be under greater financial pressure, relying more heavily on internal resources to meet their vehicle financing needs. Moreover, fundraising plays a more significant role for Secondary Purpose Operators, with 28% reporting it as a source of funding compared to just 11% of Primary Purpose Operators. This indicates that Secondary Purpose Operators are more actively seeking smaller-scale, alternative funding sources. Both groups rely less on public funding (4% for Primary Purpose Operators and 3% for Secondary Purpose Operators) and lease payments (11% for Primary Purpose Operators and 5% for Secondary Purpose Operators).

Overall, the data demonstrates shared reliance on grants, savings, and fundraising across both types of operators. However, Secondary Purpose Operators tend to face greater financial constraints, depending more heavily on their own financial reserves and smaller-scale fundraising efforts. This highlights the challenges they face in securing the necessary funding for vehicle procurement.

Figure 5.5: Finance for new vehicle purchases.

Funding source for new vehicles



Created with Datawrapper

<https://datawrapper.dwcdn.net/wLnFS/2/>

Summary



CTOs face increasing financial pressures related to vehicle ownership, maintenance, and replacement. While Primary Purpose Operators predominantly own their vehicles, Secondary Purpose Operators show even stronger ownership tendencies. Diesel dominates fuel use across both operator types, with electric vehicle (EV) adoption remaining minimal due to high costs, limited infrastructure, and operational challenges. Transitioning to EVs will require targeted investments, better infrastructure, and support to overcome these barriers. CTOs rely on a mix of grants, reserves, and fundraising to finance new vehicles, though Secondary Purpose Operators tend to face greater financial constraints.

Key points

- Primary Purpose Operators predominantly own their vehicles (75%), with a smaller proportion (19%) using a mix of ownership and leasing, whereas Secondary Purpose Operators show an even stronger preference for outright ownership (88%).
- Primary Purpose Operators have a fleet primarily focused on wheelchair accessible minibuses (96%), while Secondary Purpose Operators maintain a more diverse fleet, including a combination of accessible and non-accessible minibuses, MPVs, and cars.
- Diesel remains the dominant fuel type, powering 91% of Primary Purpose Operators' vehicles and 77% of Secondary Purpose Operators', with minimal adoption of electric vehicles (3% for Primary Purpose Operators and 2% for Secondary Purpose Operators).
- Primary Purpose Operators are more proactive in acquiring new vehicles, with 62% making purchases within the past year, compared to 68% of Secondary Purpose Operators who have not purchased new vehicles in over three years.
- Both groups rely on grants, savings, and fundraising to finance new vehicles, but Secondary Purpose Operators face greater financial constraints, relying more on internal resources and smaller-scale fundraising efforts.

Case Study: Cancer Fund for Children

Overview and Importance of Services

Each week, up to 10 children and young people (aged 0-24) in Ireland are diagnosed with cancer. Cancer Fund for Children offers comprehensive support through home visits, hospital care, and at Daisy Lodge, our therapeutic short break centre in Newcastle, Co. Down. Our Cancer Support Specialists provide informal therapeutic care to help children and families cope with the emotional challenges of cancer. We take a flexible, compassionate approach, focusing on the needs of both the child and their family. At Daisy Lodge, families spend quality time together, receiving holistic support and creating special memories, while also connecting with other families facing similar challenges.

Impact of Challenges on Service Delivery

Cancer Fund for Children strives to minimise operational costs so that funds can go directly into service delivery. However, rising fuel prices and the cost of living increase have placed additional financial pressures on the charity, particularly affecting our minibus operation. Increased fuel and maintenance costs force us to divert funds from other critical areas. Furthermore, recruitment challenges have led to a shortage of drivers and support staff, overburdening existing volunteers. This reduced availability of transport impacts families who rely on it to access our services, adding further stress to those already coping with the emotional strain of cancer.

Impact on Children and Families

Travelling to a residential in our minibus fosters a sense of community and emotional support, reducing feelings of isolation amongst our young people. They are often nervous about heading away for their first overnight residential and the time spent together in the minibus is where many friendships are forged. The minibus is also used for transporting families to Cancer Fund for Children's therapeutic short break centre Daisy Lodge, in Newcastle Co. Down. This transport service alleviates the stress of navigating unfamiliar routes or dealing with traffic, allowing families to focus on their child's well-being. In summary, the minibus is a lifeline for families supported by Cancer Fund for Children. It reduces financial, emotional, and logistical burdens, ensuring that families can access our support, and they feel supported throughout their journey.

Cancer Fund for Children,
Corinna Decodts



6. Policy and priorities

CTOs play a vital role in addressing mobility challenges, ensuring access to vital services and opportunities for individuals who may face barriers to public and private transport networks. These organisations operate with distinct objectives, models, and priorities, supporting a wide range of community needs, from providing accessible transport options to addressing financial constraints and workforce challenges.

The operational landscape of Community Transport is dynamic, with organisations adapting to both shared sector wide trends and unique challenges driven by their specific service models. Understanding these differences is crucial for informing funding strategies, workforce planning, and service delivery improvements across the sector.

This report explores the varied challenges faced by Primary and Secondary Purpose Operators, examining how financial pressures, workforce shortages, vehicle management, and operational demands are shaping their priorities. Additionally, it offers insights into the evolving needs of these organisations, focusing on how they plan to navigate these challenges in the coming years while maintaining their commitment to meeting community needs.

6.1 Sector priorities

CTOs anticipate a range of challenges in the years ahead, reflecting both sector wide concerns and those specific to their operational priorities. While financial pressures are a common theme, the nature and scope of these challenges vary between Primary Purpose Operators and Secondary Purpose Operators.

For Secondary Purpose Operators, financial sustainability is the primary concern, with 37% identifying current funding levels as a significant issue. Additionally, rising costs (21%) and the need for effective fundraising (16%) underscore the financial strain experienced by these organisations, particularly given their diverse and varied service portfolios.

In contrast, Primary Purpose Operators face challenges more directly tied to service delivery. A significant proportion (19%) express concerns about their ability to meet growing demand, highlighting the pressure to maintain and expand essential transport services. Other key challenges for Primary Purpose Operators include securing additional funding streams (8%), recruiting volunteer drivers (8%), and ensuring organisational stability and growth (6%), all of which reflect the operational demands of their role within Community Transport.

Workforce issues are a shared challenge for both groups, with similar proportions of Primary Purpose Operators (22%) and Secondary Purpose Operators (21%) citing recruitment and retention of staff as a key concern. This highlights a shared struggle to maintain a strong and reliable workforce while meeting increasing service demand.

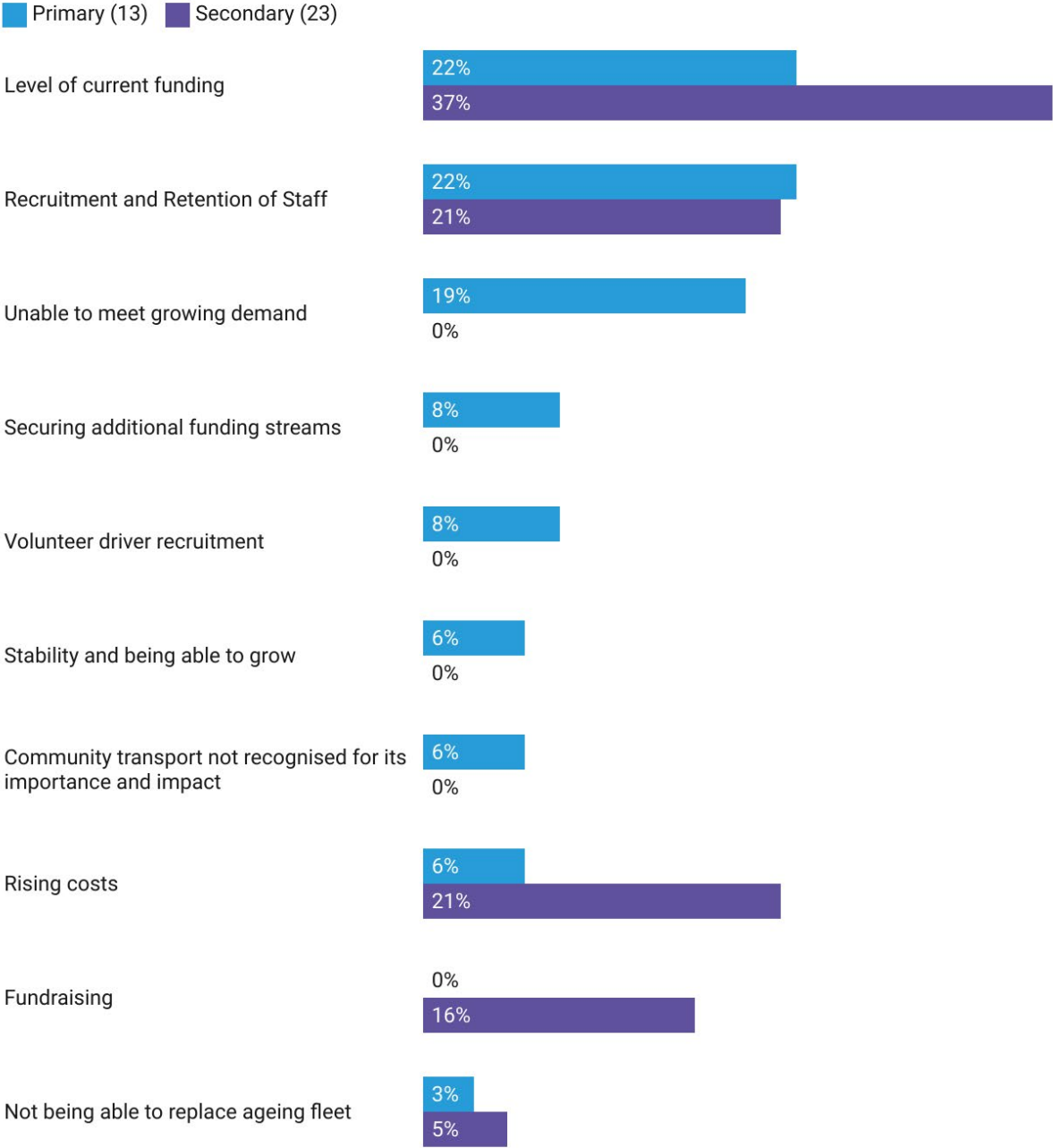
Other challenges also contribute to the sector's complexity, such as the lack of recognition for the role and impact of Community Transport (6% of Primary Purpose Operators) and the difficulty of replacing ageing vehicles, which is a concern for both groups, though less frequently reported.

Addressing these challenges will require a nuanced and tailored approach, one that acknowledges the distinct needs of Primary and Secondary Purpose Operators while promoting sector-wide solutions to strengthen and support the Community Transport network as a whole. CT should be

recognised as an integral part of the transport infrastructure in Northern Ireland and consulted as such within the overall transport network, rather than being seen as a nice or add on. It is a crucial component of the transport infrastructure within Northern Ireland.

Figure 6.1: Main Issues affecting Primary and Secondary Operators.

Main issues for CTOS



Created with Datawrapper

<https://datawrapper.dwcdn.net/S9h88/1/>

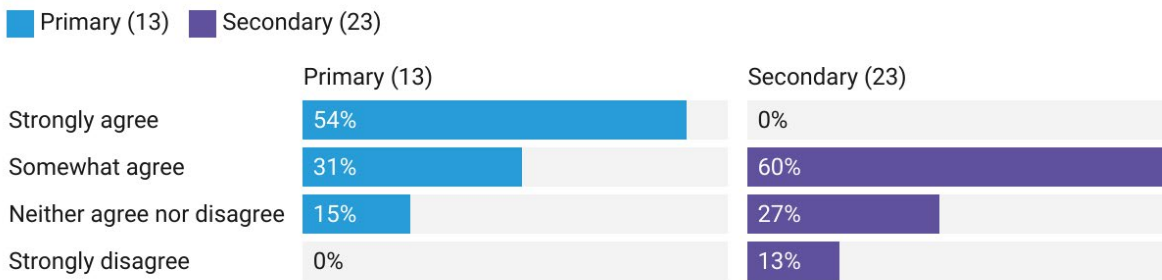
6.2 Connections to decision makers

The data in Figure 6.1 highlights notable differences in how Primary and Secondary Purpose Operators perceive their connections with other voluntary and community groups. For Primary Purpose Operators, the sense of integration is particularly strong, with over half (54%) strongly agreeing that they are well connected, while 31% somewhat agree. This indicates a high level of collaboration and active engagement within their local networks. A further 15% adopt a neutral position, and none strongly disagree, suggesting that even among less confident organisations, there are no significant perceptions of disconnection.

In contrast, Secondary Purpose Operators report more varied levels of connectivity. While a majority (60%) somewhat agree that they are well connected, this suggests a more moderate level of engagement compared to Primary Purpose Operators. A substantial proportion (27%) neither agree nor disagree, which may reflect uncertainty or weaker integration into local networks. Furthermore, 13% strongly disagree, indicating challenges in establishing and maintaining meaningful connections with other community groups.

Figure 6.2: Connection to other Community and Voluntary groups.

Connection to other voluntary and community groups



Created with Datawrapper

<https://datawrapper.dwcdn.net/PlDgX/1/>

The responses highlight a wide range of priorities for the CTA, reflecting the distinct operational needs and challenges of Primary and Secondary Purpose Operators.

Securing funding stability emerges as the most significant concern for both groups, identified as the top priority across all respondents. This shared focus underscores the critical need for reliable financial support to maintain services, address rising costs, and meet growing demand.

Secondary Purpose Operators prioritise capital funding for vehicles, demonstrating the urgency to replace ageing fleets or invest in new vehicles to ensure effective and reliable service delivery. Meanwhile, Primary Operators place a slightly greater emphasis on achieving equality in the interpretation of licensing regulations across the UK, highlighting concerns about operational inconsistencies that may impact efficiency and service uniformity.

Both groups recognise the importance of advocacy and lobbying to raise awareness of Community Transport and influence policy decisions. This shared priority demonstrates the need for a united voice to ensure that the sector’s contributions and challenges are acknowledged and supported at both national and local levels.

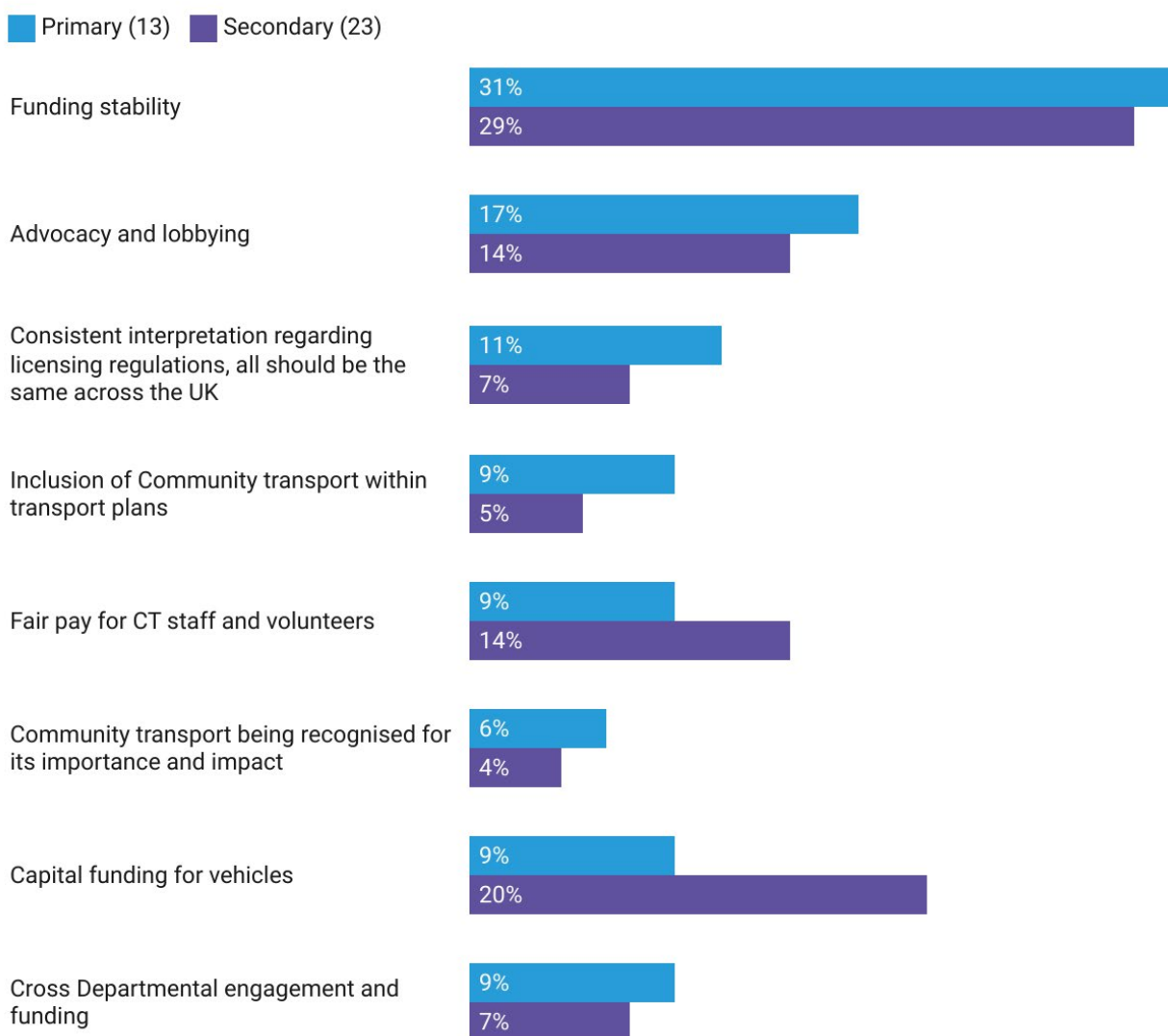
Workforce related issues are a more pronounced concern for Secondary Purpose Operators, with particular attention given to fair pay for staff and volunteers. This reflects the challenges of recruiting and retaining skilled individuals while addressing workforce pressures.

Additionally, both groups show interest in integrating Community Transport into broader transport plans and cross departmental funding strategies, although these priorities are ranked slightly lower overall. This indicates a shared ambition to strengthen the sector’s role within the wider transport system and secure long-term financial and operational sustainability.

In conclusion, while the responses reveal common priorities such as funding stability and advocacy, they also highlight distinct operational challenges between the two groups. Addressing these priorities will require a nuanced, tailored approach that balances immediate organisational demands with long-term, strategic sector goals.

Figure 6.3: Suggested areas of focus for Community Transport Association (CTA).

Suggested areas of focus for CTA



Created with Datawrapper

<https://datawrapper.dwcdn.net/QIC1M/3/>

Summary



CTOs address mobility challenges by providing vital services to individuals who face barriers to public and private transport. Primary and Secondary Purpose Operators face distinct challenges, particularly around financial pressures, workforce shortages, and operational demands. While both groups recognise the importance of securing stable funding and advocating for the sector, their specific priorities differ. Primary Purpose Operators focus on meeting rising service demands and securing additional funding, while Secondary Purpose Operators prioritise fleet management and addressing workforce concerns. Strong connectivity with local networks is a strength for Primary Purpose Operators, while Secondary Purpose Operators experience more variability in their integration. Including CT within transport plans is crucial for ensuring its integration into the broader public transport infrastructure. This requires recognising CT as a key component with the overall transport network, with cross departmental support and engagement. Both groups agree on the importance of sustainable funding, workforce retention, and advocacy to support their growth and stability.

Key Points

- Securing funding stability is the primary concern for both groups, emphasised as the top priority by all respondents, highlighting the urgent need for reliable financial support to sustain services, manage rising costs, and meet increasing demand.
- Both groups face significant difficulties in attracting and retaining skilled staff, underlining the shared concern over workforce shortages that impacts their ability to meet growing service requirements.
- Advocacy is seen as a crucial focus for both types of operators, as they seek to raise awareness of Community Transport's value and ensure the sector's needs are acknowledged in policy-making.
- Primary Purpose Operators report stronger connections with other community groups, while Secondary Purpose Operators experience more varied levels of engagement.

7. Survey Method and Response

The Mapping Northern Ireland survey was funded by a Dormant Accounts Research grant and builds on similar mapping projects previously undertaken by the CTA in Scotland, Wales, and England. Developed in close collaboration with CTA staff and CTO members across Northern Ireland, the survey was carefully reviewed and piloted to ensure its relevance and clarity. Feedback from CTO members was instrumental in refining the final questionnaire.

The survey was distributed to CTOs across Northern Ireland and was available both online and in hard copy to maximise accessibility. Data collection took place from June to September 2024.

Comparing the survey responses with the overall CTA Northern Ireland membership indicates that the findings are broadly representative of the membership, offering a reliable insight into the views and experiences of the sector across the region.

Due to rounding individual percentages to the nearest whole number or decimal place, the total may slightly exceed or fall short of 100%. This happens because rounding can create small discrepancies that accumulate and impact the overall total

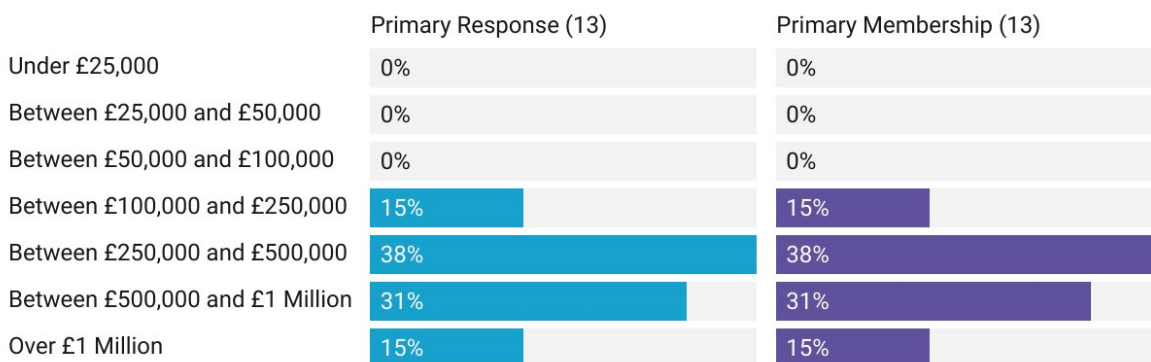
7.1 Mapping Northern Ireland response

After data cleaning, 43 organisations submitted responses to the survey. However, not all respondents completed every question, resulting in varying base numbers for different questions. It is important to note that the data presented in this report is unweighted.

All Primary Purpose Operators participated in the survey, and the response rate closely aligns with the income distribution within the membership. This suggests that the survey sample accurately reflects the income profile of Primary Purpose Operators.

Fig 7.1: Mapping Northern Ireland Primary Response by income band

Mapping Northern Ireland Primary Response by income band



Created with Datawrapper

<https://datawrapper.dwcdn.net/3c3xL/2/>

7.2 Secondary operators

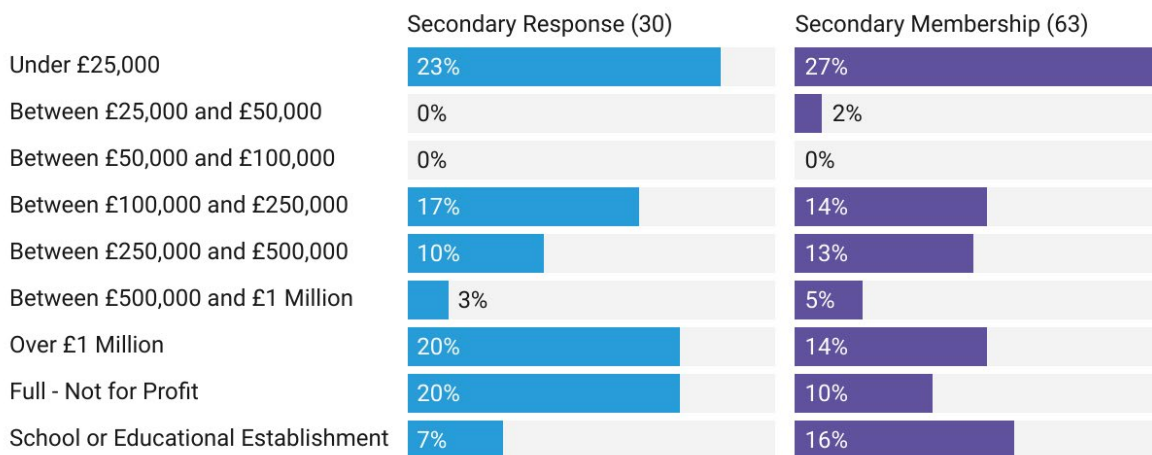
The survey responses from Secondary Purpose Operators generally align with the income distribution of the wider membership, although some variations are observed. For example, 23% of respondents reported incomes under £25,000, which is slightly lower than the 27% in the full membership. Conversely, 20% of survey respondents reported incomes over £1 million, representing a higher proportion than the 14% in the broader membership.

Additionally, the survey captured a greater share of Full - Not for Profit organisations (20%) compared to 10% within the overall membership. On the other hand, the representation of Schools or Educational Establishments was lower, with only 7% of responses compared to 16% in the full membership.

In summary, while the survey data broadly reflects the income distribution of Secondary Purpose Operators, notable discrepancies exist, particularly in the higher-income categories and the representation of educational institutions. Collectively, this profile represents a good view of the NI membership.

Fig 7.2: Mapping Northern Ireland Secondary Response by income band

Mapping Northern Ireland Secondary Response by income band



Created with Datawrapper

<https://datawrapper.dwcdn.net/ngWLS/1/>

cta

community transport
association



**Dormant
Assets NI**

Delivered by

**THE NATIONAL LOTTERY
COMMUNITY FUND**

Community Transport Association

91 Princess Street
Manchester
M1 4HT

0345 130 6195
niteam@ctauk.org

www.ctauk.org

facebook.com/CTAUK1

linkedin.com/company/community-transport-association-uk

© CTA 2025

Charity registered in England and Wales (1002222)