

**community transport
association**



MORE THAN A MINIBUS

Scotland's Community Transport Sector in 2021

MORE THAN A MINIBUS

Scotland's Community
Transport Sector in 2021

cta
community transport
association

CONTENTS

KEY FINDINGS	4
INTRODUCTION	9
CONTEXT & METHODOLOGY	10
Mapping Scotland	10
Methodology	11
Context	12
DATA & ANALYSIS	13
Operators & governance	13
Permits	16
Geography	18
Schemes & services	21
Vehicles	24
Staff & volunteers	27
Passengers & journeys	31
Funding	36
Purposes & activities	40
CONCLUSIONS & RECOMMENDATIONS	44
ACKNOWLEDGEMENTS	47

KEY FINDINGS

COMMUNITY TRANSPORT IN SCOTLAND IN 2021...



166

operators



4

new operators



7.2%

operated no transport schemes in 2021



Over

802,000

passengers



Over

890,000

journeys

000h

Over

5.18m

miles



353

Community Transport schemes across Scotland



78%

are charities

30%



Group Vehicle Hire

24%



Dial-a-Ride / Door-to-Door / Demand Responsive Transport

22%



Transport to Health & Social Care

13%



Medication, Prescription or Shopping Collection service

11%



Community Bus Service

10%



Car Clubs and Travel Share

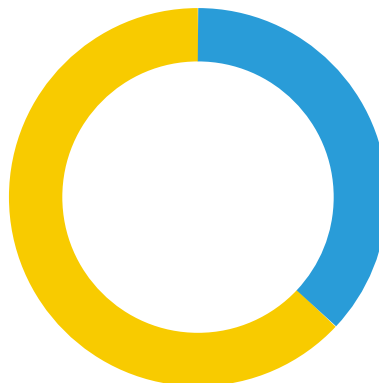
5%



Bike / e-Bike Hire

63%

secondary purpose operators



37%

primary purpose operators

3,200

people per operator
in Orkney

1 in 5

based in Highlands

187,065

people per operator
in Fife

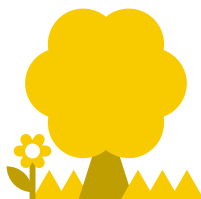
12%

based in Glasgow



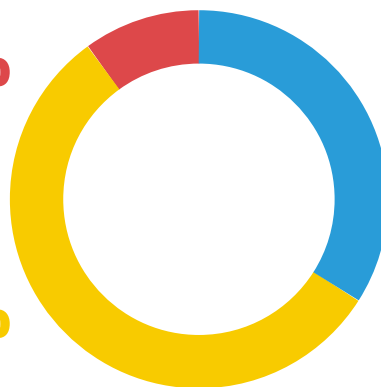
10%

island



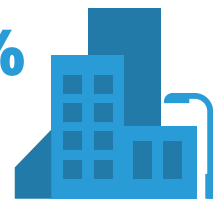
44%

rural



34%

urban



900+

Community Transport vehicles



2 in 3

vehicles are minibuses



68%

of fleet is accessible



12%

of fleet is electric or hybrid



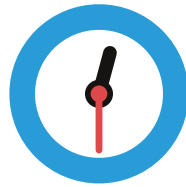
£87.4m

funding gap to decarbonise fleet



2,000+

Community Transport
volunteers



12.5hrs

average volunteer
hours per week



1,131+

jobs in Scotland's
Community Transport sector



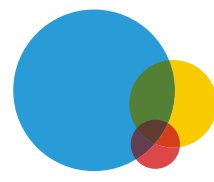
43%

reported lower levels of
volunteer recruitment



92%

did not attract young
volunteers in 2021



16%

Living Wage-accredited



2,274

drivers in
Community Transport



27%

drivers hold D1 licence



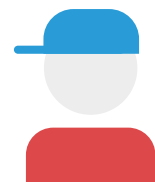
1 in 2

served older and
disabled people



36%

supported charities and
community groups



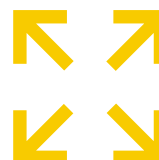
26%

transported children
and young people



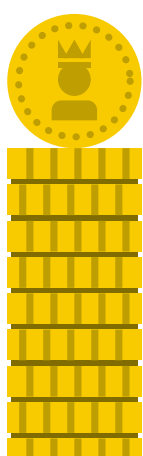
45%

report increased demand
in 2021



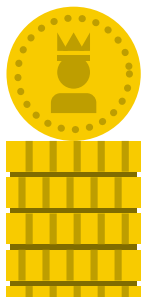
69%

want to expand



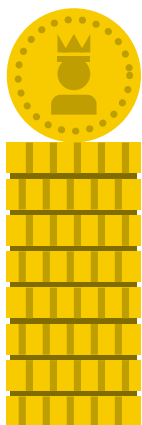
35%

received
Bus Service
Operators'
Grant



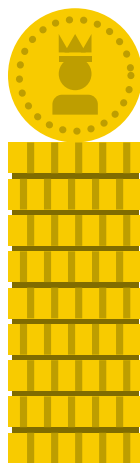
23%

received fare
income



33%

relied on just
one source
of funding



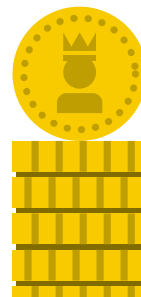
36%

gross annual
income under
£25K



13%

gross annual
income over
£1m



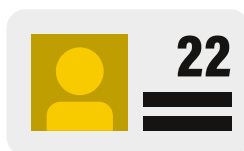
23%

uncomfortable
with level of
reserves



68%

have at least one
Section 19 permit



10%

have at least one
Section 22 permit



9

have no licence



26%

have no website



11%

delivered
befriending projects



22%

delivered wellbeing, therapy,
mental health or counselling
services



1 in 10

cared for community
woodland or allotment



17%

operated food bank or
community pantry



INTRODUCTION



Our flagship Mapping Scotland project was launched to research, map and analyse Scotland's Community Transport sector back in early 2021. This report is packed full with new and

valuable data, evidence and insights, as well as 14 case studies, which we hope can inform and enhance your own work – whether you're an operator, a volunteer, a policymaker or a funder – as it will ours.

We're also proud to share the first-ever interactive, online map of Community Transport in Scotland – available at www.ctauk.org/mapping-scotland-project – as a useful resource for:

- **New and existing operators to identify and collaborate with their peers and neighbours**
- **Politicians, policymakers and regulators to implement policies and strategies which recognise and help our sector**
- **Funders and stakeholders to understand and respond to the financial needs of our sector**
- **Volunteers, passengers and the public to find services and opportunities near them**

As you'll see in our Conclusions & Recommendations, we're committed to using the map and the results of our research to inform and enhance everything we do in the year ahead – from establishing new forums and curating exciting events, to engaging with funders and influencing policy.

Community Transport is more than just a minibus. Our sector brings people together, builds community wealth and tackles big problems like climate change, poverty, inequality, exclusion and loneliness. Operators are innovating with new and different modes and models, from e-bikes to car clubs. As Scotland recovers from COVID-19, struggles with a cost of living crisis and transitions to net zero, Community Transport is perhaps more important now than ever before.

Thank you to everyone who has supported this project – especially our members, who do amazing work every single day, and our partners at Transport Scotland, who back us to the hilt. We couldn't have done this without you.

I'm so proud of all that we've achieved together with our members – not least this report, the first of its kind for the Community Transport sector since 2015 – in the nearly twelve months since I became Director for Scotland. It's testament to the commitment, hard work and expertise of my new colleagues, Nicola and Lara, as well as our predecessors, at CTA.

But this is just the start of our journey together.

The Community Transport sector has built back better from the pandemic – and so have we. CTA's Team Scotland has grown – and, we hope, will continue to strengthen – as we deliver on our ambitions to champion, connect, support and grow the sector. We look forward to hearing your views – online with **#MoreThanAMinibus**, at CTA Scotland Conference 2022 in Perth and beyond – on what our research can tell us about the present and, most importantly, the future of Community Transport.

David Kelly

*Director for Scotland,
Community Transport Association*

CONTEXT & METHODOLOGY

Mapping Scotland

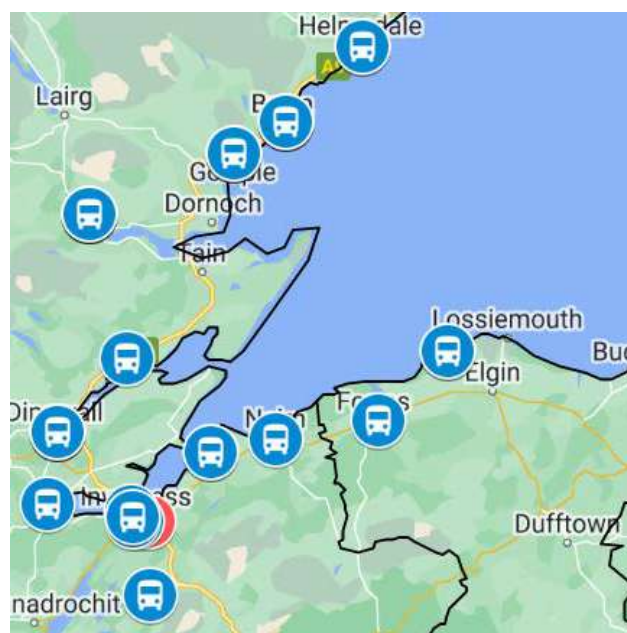
CTA's Team Scotland launched our Mapping Scotland project in early 2021 in partnership with Transport Scotland. A steering group of CTA members was established to provide advice and guidance throughout the process. The project had four clear objectives:

1. **Recover from COVID-19:** The pandemic proved how valuable Community Transport is for people and communities across Scotland, but it was also an exceptionally challenging period for operators. We need to understand the impact of COVID-19 and make the case for change, securing evidence-based policymaking, greater recognition and more funding.
2. **Raise our profile:** Limited awareness or understanding of Community Transport in some political, policymaking and funding circles, as well as in many communities, is holding the sector back. We need to showcase its diversity and strength to grow the sector, attract new talent, reach new audiences and restore passenger levels.
3. **Identify gaps and opportunities:** Uncovering where there is – or is not – Community Transport will empower CTA to be data-driven and enable us to focus, plan and prioritise. We will use our findings to build new forums, facilitate collaborations and help create new operators in the right places. It will also help our wider work to better integrate the sector into Scotland's transport network.

4. **Prepare for the future:** The Community Transport sector faces a number of major challenges – from Scotland's ageing demographics and escalating driver shortages, to the cost of living crisis and the transition to net-zero. We need to understand the nature and scale of these issues to demand, design or deliver the investment and support the sector needs from CTA, national or local government, regulators and funders.

To achieve these objectives, we determined to:

1. Build the first-ever map of Community Transport in Scotland
2. Publish the first 'State of the Sector'-style report of the sector since 2015

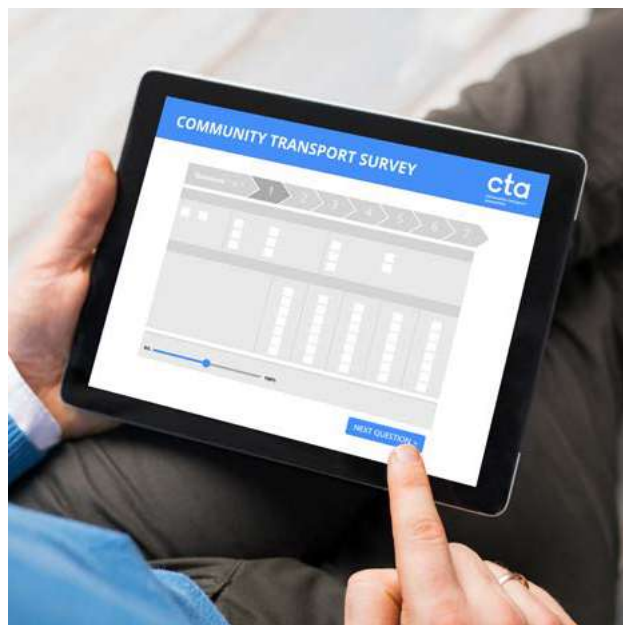


Methodology

To deliver these two major outputs, we conducted a rigorous data- and evidence-gathering exercise in late 2021 and the first half of 2022, which included the following key elements:

- Extensive desk-based research on 166 Community Transport operators
- Literature review of past research, reports and strategies by CTA and the sector
- Regular steering group meetings to co-design our research methods
- Qualitative interviews, visits and meetings with dozens of CTA members and stakeholders
- Detailed quantitative survey responses from 70 CTA members
- 14 case studies of urban, rural and island operators from 11 local authorities

The survey was sent to all 166 CTA members in Scotland. Each operator received a partially pre-filled survey, which drew on our knowledge of them and their services based on the CTA database and our extensive desk-based research, to build an indicative picture of the sector.¹



We received a total of 70 complete survey responses from CTA members – representing a response rate of just over 42% – with answers to our detailed questions about governance, permits, vehicles, funding and so on. This gives us a large and representative sample of the sector on which to base our findings and draw conclusions.

Moreover, for the 96 operators who did not respond, our prior knowledge and desk-based research enables us to include them in some of the data categories (e.g. geography, permits, income), albeit not others (e.g. number of employees, volunteers, vehicles). Some data is therefore based on all operators, while other data is based on respondents only. All 166 operators are represented on our map of the sector, but some with less information than respondents.

¹ www.ctauk.org/mapping-scotland-project

Context

2021 was, of course, no ordinary year. The COVID-19 pandemic still dominated all of our daily lives. Driver shortages, fewer passengers and unprecedented restrictions on our ability to travel forced all transport operators to adapt and change – or even to suspend or withdraw services altogether.

Nevertheless, this report is proof that Community Transport weathered the storm. Despite the challenges and the struggles, despite all of the ups and downs, the sector survived and much of it even managed to thrive, playing an essential and lifesaving role in Scotland's response to a public health emergency.²

Consequently, our research does not provide us with a conventional baseline of Community Transport in Scotland. Instead, it captures the state of a sector doing its best at an extraordinary moment of national crisis, as new ways of working, living and travelling emerged. It is a snapshot of how things were in 2021. Things may look quite different in 2022 – and certainly looked very different in 2019, before the pandemic.

However, as the first 'State of the Sector'-style report for seven years with a more comprehensive and detailed range of questions, it does provide us with an up-to-date source of valuable data, information and insights about Scotland's Community Transport sector in 2021.

It has also enabled us to build the first-ever interactive, online map of Community Transport in Scotland, which is available at www.ctauk.org/mapping-scotland-project as a resource for operators, politicians and policymakers, funders, regulators and stakeholders, as well as communities, passengers and the general public. While this companion report digs deeper into the numbers to present a more detailed picture of the sector, the map provides a spatial overview of Community Transport and 166 operators in all their diversity.



² www.ctauk.org/report-serving-scotland-during-covid

DATA & ANALYSIS

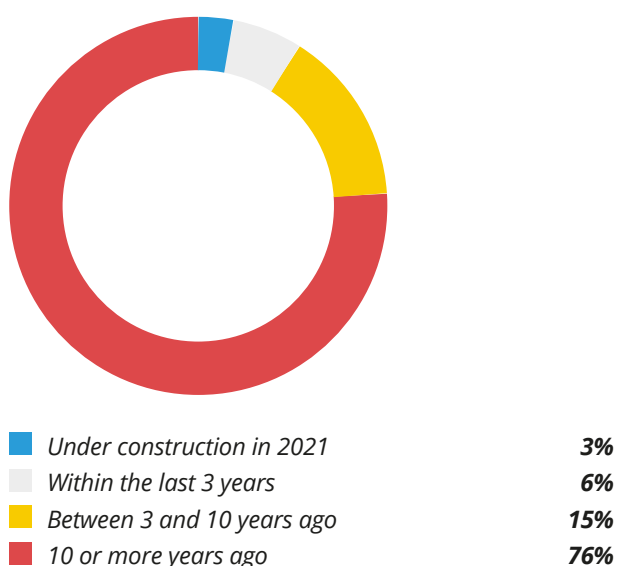
Operators & governance

In 2021, CTA had 166 members in Scotland delivering a wide range of community-led, not-for-profit transport services with accessibility, inclusivity and sustainability at their heart.

The Community Transport sector has a long and proud history of serving people and communities across Scotland. A significant number of operators have been in existence for many years or even decades, becoming an indispensable, trusted and valued piece of the fabric of urban, rural or island life. 76% of CTA members have been delivering local transport services for 10 years or more.

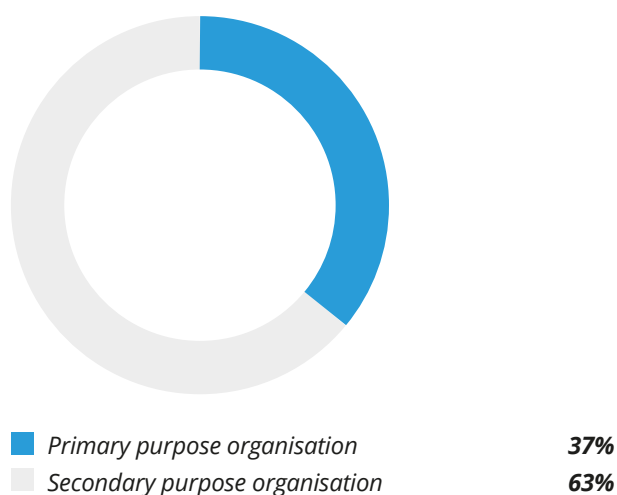
However, the sector is still dynamic and growing, with many new Community Transport operators being created in recent years – 9% within the last 3 years between 2021 and 2019, despite the immense challenges of the COVID-19 pandemic demonstrating the extent of unmet transport needs across Scotland.

When was your organisation established?



Most CTA members (63%) are so-called 'secondary purpose organisations', which deliver transport services to support other functions and objectives, but not as their main purpose – such as a community trust or local charity – or even as a potentially minor aspect of their overall activities – such as a college, university, school or care home. A large minority (37%) are 'primary purpose organisations' where Community Transport is their main or sole purpose.

Is Community Transport a primary or secondary purpose for your organisation?



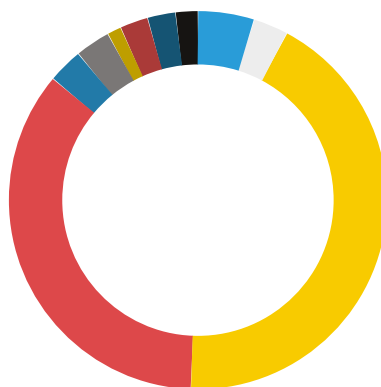
One of the most significant characteristics of Community Transport has always been the diversity of the kinds of organisations involved in the sector, how they are constituted and structured and how and by whom they are governed. Our research finds that this strongly remained the case in 2021, perhaps even more so as some operators adopt newer models, such as social enterprise (3%).

Many operators are charities and registered as a Scottish Charitable Incorporated Organisation (SCIO) (42.8%), the formal legal structure which allows Scottish charities to be corporate bodies capable of employing people, owning property, entering into contracts and so on, and is regulated by the Office of the Scottish Charity Regulator (OSCR).³ A similar proportion of operators are a Company Limited by Guarantee (CLG) (40.3%), most of which also have charitable status (35.5%), meaning that they are regulated by both Companies House and OSCR.⁴

Other types of organisation involved in Community Transport include Public Bodies (3%) like local authorities or regional transport partnerships; Third Sector Interfaces, which provide a single point of access for support and advice for the third sector within a local area (2.4%); Education Establishments like colleges, universities and schools (2.4%); and Community Interest Companies (1.2%).⁵

There are two types of SCIO – single-tier and two-tier. In single-tier SCIOs, the trustees and members of the charity are one and the same, while in two-tier SCIOs there is a separate body of members.⁶ The former therefore retain control of the organisation with a smaller number of people, while the latter increases the need and opportunity for community participation and wider accountability. Of the Community Transport operators which are SCIOs (42.8%), there is a roughly even split between single-tier (55%) and two-tier (45%) SCIOs.

What is the status of your organisation?



Company Limited by Guarantee (CLG)	8 (4.8%)
Public Body	5 (3%)
Scottish Charitable Incorporated Organisation (SCIO)	71 (42.8%)
Company Limited by Guarantee (CLG) with charitable status	59 (35.5%)
Social Enterprise	5 (3%)
Unincorporated Association	5 (3%)
Community Interest Company (CIC)	2 (1.2%)
Educational Establishment	4 (2.4%)
Third Sector Interface (TSI)	4 (2.4%)
Other	3 (1.8%)

The high number of single-tier SCIOs in the sector likely reflects the perennial challenges faced by local charities and community groups in recruiting and retaining trustees and members, as well as relatively high number of Community Transport operators in Scotland which are new or located in smaller rural or island communities.

³ www.oscr.org.uk/media/3113/cscios_a_guide.pdf

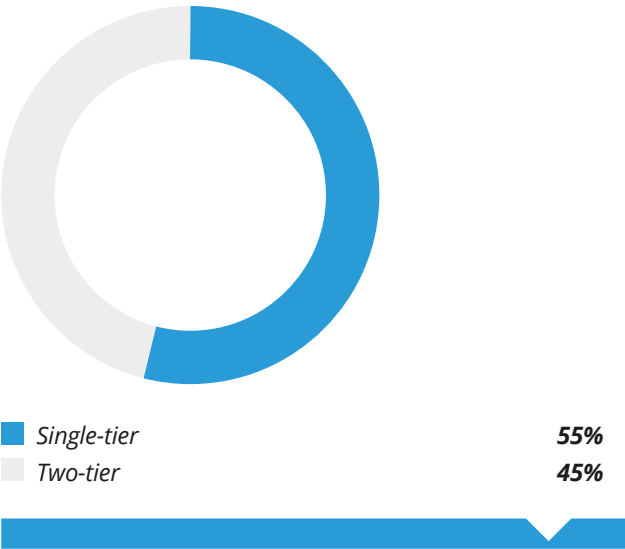
⁴ <https://scvo.scot/support/setting-up/structure>

⁵ <https://tsi.scot>

⁶ www.oscr.org.uk/media/3113/cscios_a_guide.pdf

8% of operators have a trading arm, indicating how the sector has strived to innovate and diversify its sources of revenue as funding from the public sector has remained stagnant or declined in real terms.⁷

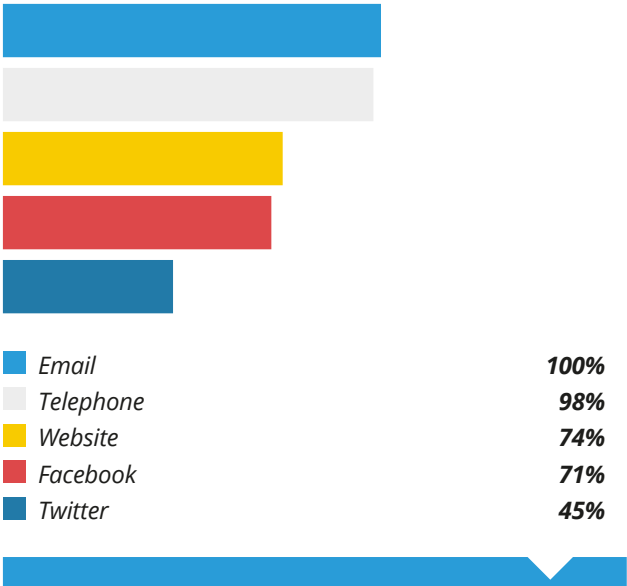
What type of SCIO are you?



Our research illustrates that the digitisation and modernisation of the sector and the way it operates remains an ongoing challenge. All of Scotland's 166 Community Transport operators can be reached by email (100%) and nearly all by telephone (98%). However, 26% of operators do not have a website, which is an essential requirement for any business or organisation to be accessible and successful in the internet age. Others do not have an easily navigable, user friendly or up-to-date website.

Cost has proven prohibitive to some smaller operators, especially those surviving on shoestring budgets, while a lack of knowledge or skills is a barrier for others, which highlights the need for a greater diversity and a younger demographic of staff, volunteers and trustees in the future. 29% of operators do not have a presence on Facebook, while 55% are not active on Twitter, where new and larger audiences can often be reached. There is clearly a need for more support for some operators to digitise and modernise the way they communicate about and operate their services.

Do you have...?



⁷ www.ctauk.org/scotlands-spending-review-ctas-call-for-multi-year-funding

Permits

The Community Transport sector in Scotland is governed by the provisions of the Transport Act 1985, which applies across Great Britain. There are two types of permit issued under this legislation – Section 19 and Section 22 permits. CTA provides advice and support to operators on the legislation and is a designated body which can issue Section 19 permits to our members.⁸

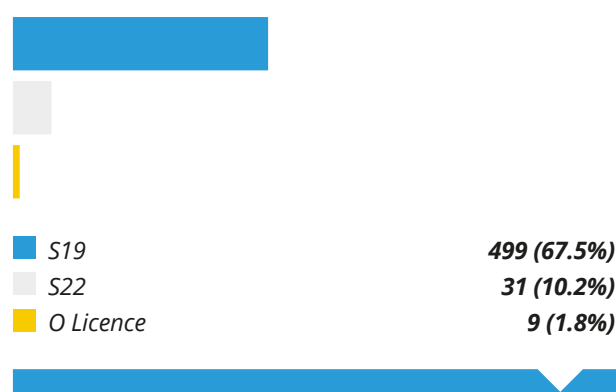
Section 19 permits may be granted to non-profit organisations to transport their members or identified people ‘whom the organisation exists to help’ and are required for each vehicle in operation at any one time.⁹ 67.5% of operators held at least one Section 19 permit in 2021.

Section 22 permits may be issued to not-for-profit organisations ‘concerned for the social and welfare needs of one or more communities’ and providing a timetabled community or local bus service which, unlike Section 19 services, can carry the general public.¹⁰ Section 22 permits are issued by the Traffic Commissioner for Scotland.¹¹ Just over 1 in 10 CTA members in Scotland (10.2%) held a Section 22 permit in 2021.

Section 22 permits are essential to enable Community Transport operators to deliver free services for holders of the National Entitlement Card for older people over 60 years old and disabled people, and those eligible under the Young Persons’ (Under 22s) Free Bus Travel scheme, which cannot be used on Section 19 services.¹²

A Public Service Vehicle Operator Licence – also known as an ‘O Licence’ – is required to ‘operate a vehicle for hire or reward (payment or payment in kind) that can carry 9 or more passengers’ or to ‘operate a smaller vehicle carrying passengers and charging separate fares for the journey’.¹³ Of 166 operators in Scotland in 2021, only 9 held an O Licence (1.8%), which is more complex and expensive. It remains the preserve of some larger Community Transport operators with more complex operations.

What permits do you hold – and how many?



The CTA membership in Scotland held a total of 539 permits in 2021. There were 51 operators who did not hold – or did not report holding – any permits in the same year, representing nearly 1 in 3 operators. This is an incomplete picture as we did not secure a 100% response rate. For some operators, this may be an outstanding issue of compliance, with which CTA can offer guidance and support. For others, however, it will reflect the nature of their services for which no permits are required.

⁸ www.ctauk.org/cta-advice-service/faq/section-19-permits

⁹ www.gov.uk/government/publications/section-19-and-22-permits-not-for-profit-passenger-transport/section-19-and-22-permits-not-for-profit-passenger-transport

¹⁰ www.gov.uk/government/publications/section-19-and-22-permits-not-for-profit-passenger-transport/section-19-and-22-permits-not-for-profit-passenger-transport

¹¹ www.gov.uk/government/organisations/traffic-commissioners

¹² www.ctauk.org/tackling-inequality-in-partnership-with-transport-scotland

¹³ www.gov.uk/psv-operator-licences

CASE STUDY

Thornhill and District Community Transport

The Section 22 permit has enabled Thornhill and District Community Transport to operate a vital Community Bus Service. It provides the only public transport link between Thornhill in rural Dumfries and Galloway and surrounding villages, Castle Douglas and Dumfries. Its timetabled services are a lifeline for these rural communities, facilitating access to shops and public services as well as preventing rural deprivation, exclusion and isolation, especially for local older people.



© Thyge Finkelsen – shutterstock.com

Geography

How many CT operators do you have?

Local Authority	Number of CT operators	% of CT operators	CT operators per head of population
Aberdeen	3	2%	76,353
Aberdeenshire	15	9%	17,385
Angus	2	1%	57,910
Argyll and Bute	9	5%	9,492
Clackmannanshire	1	1%	51,290
Comhairle nan Eilean Siar	3	2%	8,833
Dumfries and Galloway	7	4%	21,184
Dundee	2	1%	74,410
East Ayrshire	2	1%	60,800
East Dunbartonshire	0	0%	N/A
East Lothian	2	1%	53,950
East Renfrewshire	1	1%	96,060
Edinburgh	11	7%	47,965
Falkirk	1	1%	160,560
Fife	2	1%	187,065
Glasgow	20	12%	31,782
Highland	34	20%	6,924
Inverclyde	0	0%	N/A
Midlothian	1	1%	93,150
Moray	2	1%	47,855
North Ayrshire	2	1%	67,125
North Lanarkshire	2	1%	170,570
Orkney Islands	7	4%	3,200
Perth and Kinross	12	7%	12,659
Renfrewshire	3	2%	59,796
Scottish Borders	4	2%	28,810
Shetland Islands	1	1%	22,870
South Ayrshire	3	2%	37,380
South Lanarkshire	8	5%	40,102
Stirling	3	2%	31,360
West Dunbartonshire	2	1%	44,170
West Lothian	1	1%	183,820

Community Transport has a strong presence throughout Scotland, from Shetland to Dumfries and Galloway. 1 in 5 CTA members are in the sprawling Highland region, which is Scotland's largest and one of its least densely populated local authorities. The sector is also strong in Glasgow (12%), Aberdeenshire (9%), Perth and Kinross (7%) and Edinburgh (7%).

Proportionally, Community Transport is most common in Orkney, where there is one operator for every 3,200 people. Not far behind is Highland, where there is one operator for every 6,924 people, as well as Comhairle nan Eilean Siar (8,833 people) and Argyll and Bute (9,492 people). Perth and Kinross (12,659 people) and Aberdeenshire (17,385 people) perform similarly well.

There are CTA members in all but two of Scotland's 32 local authorities – East Dunbartonshire and Inverclyde. However, this does not mean there is not a need for Community Transport in these areas. Indeed, there are likely to be some smaller, secondary purpose organisations which exist on the ground, but are not CTA members.

East Dunbartonshire is one of Scotland's most affluent council areas with high levels of private car ownership and use in highly suburbanised, commuter towns like Bearsden, Milngavie and Kirkintilloch which, although relatively geographically close to each other, are not well connected by public transport.¹⁴ Community Transport could play an important role in East Dunbartonshire in improving connectivity, reducing car dependency and empowering communities to take climate action.

Inverclyde has the highest proportion (30%) of its population living in the 10% most deprived areas in Scotland of any local authority.¹⁵ The cost of living crisis will have a disproportionate impact on people in these neighbourhoods. Community Transport could play an important role in Inverclyde in reducing forced car ownership, reducing health inequalities and tackling transport poverty.

Community Transport is also significantly under-represented in Fife – a significant council area with a large population, many rural communities and unmet transport needs – where there are just two operators in total or one operator for every 187,065 people. A small number of operators in West Lothian (183,820 people), North Lanarkshire (170,570 people) and Falkirk (160,560 people) also serve large numbers of people.

CASE STUDY

North Area Transport Association

North Area Transport Association (NATA) is a social enterprise which has been serving the people and communities of the North of Glasgow – home to some of the city's most deprived and marginalised neighbourhoods in the city, such as Sighthill and Springburn – since 2004.

NATA operates Community Bus Services, Dial-a-Ride, group vehicle hire and schools transport with a fleet of ten accessible minibuses and twelve paid drivers. It reinvests any profits straight back into serving the local community and providing affordable ways for local people to travel across Glasgow to maintain social connections and access essential services.

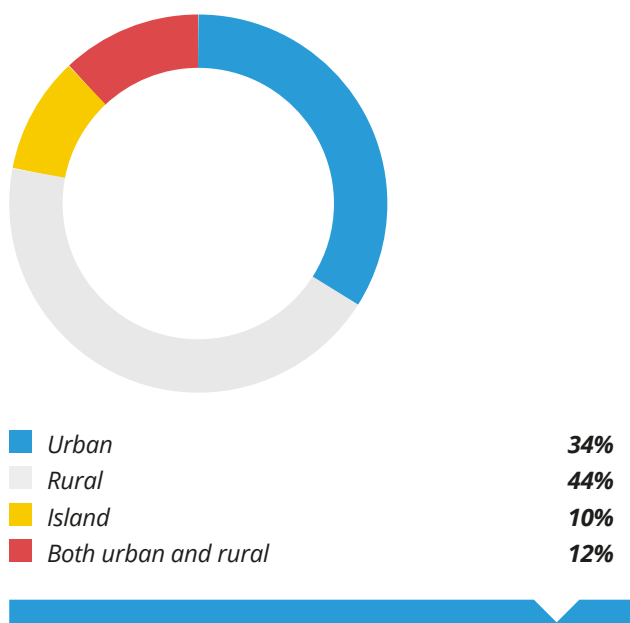
¹⁴ www.gov.scot/news/scottish-index-of-multiple-deprivation-2020

¹⁵ www.gov.scot/news/scottish-index-of-multiple-deprivation-2020

Community Transport in Scotland has historically been perceived as a primarily or even exclusively rural phenomenon. However, our research underlines that community-led, not-for-profit transport services are needed and delivered in urban as well as rural and island communities from north to south, east to west.

Although 44% of operators are based in rural areas and 10% in island communities, 46% exclusively or partly serve people in urban places. Unmet transport needs are not an exclusively rural problem in modern Scotland. It is clear there is a lack of accessible public transport provision in urban areas too and that the Community Transport sector is stepping up to fill the gap and build community wealth.

Do you serve an urban, rural or island community?



From our research, it is clear that there are four key factors which explain the geographical profile of the Community Transport sector:

- **Complex geography:** Community Transport is concentrated in areas with a complex rural or island geography to provide lifeline transport services and tackle the connectivity challenges faced by these communities (e.g. Argyll and Bute; Dumfries and Galloway; Highland; Orkney Islands)
- **Unmet transport needs:** Community Transport is concentrated in areas where public transport has failed to meet the needs of people (e.g. older people; disabled people) and communities (e.g. remote villages; deprived neighbourhoods; smaller, disconnected towns on the edge of cities – Aberdeenshire; Edinburgh; Glasgow; South Lanarkshire) due to inaccessibility, unaffordability or even a lack of any provision at all
- **Community leadership:** Community Transport is concentrated in areas where local people and communities have taken the initiative and organised to design, build and deliver community-owned, community-led solutions to their problems against all the odds
- **Council backing:** Community Transport is concentrated in areas where there has been strong support and significant funding for operators from the local authority (e.g. Aberdeenshire; Highland; Perth and Kinross) and/or regional transport partnership (e.g. Strathclyde Partnership for Transport)

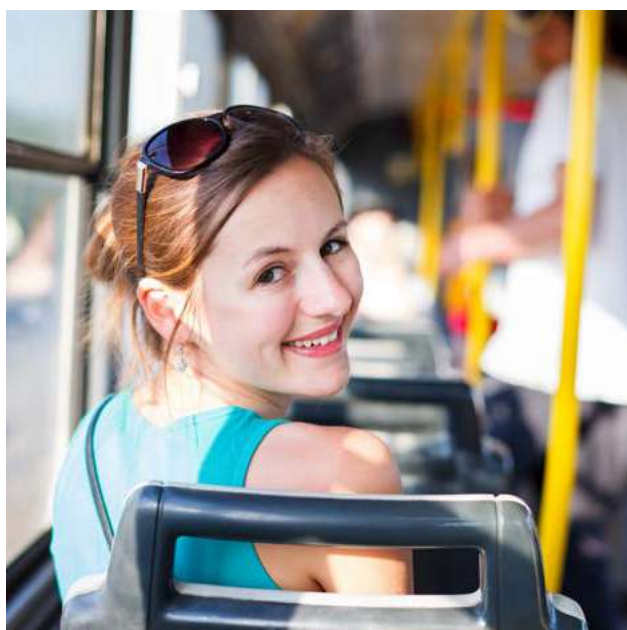
CASE STUDY

Badenoch and Strathspey Community ConnXions

Badenoch and Strathspey Community ConnXions provide accessible transport alongside other services and social inclusion projects to reduce loneliness and isolation across the small towns and villages of Badenoch and Strathspey, a large and highly rural region with a few public transport options around Aviemore in Highland.

The operator – which was crowned UK Community Transport Provider of the Year in 2021 – delivers Community Bus Services, a Community Car Scheme, Vehicle Hire, a Mobility Scooter & Wheelchair Loan Service and more.

You can find out more about the geography of Scotland's Community Transport sector or the operators in your area by visiting our map at www.ctauk.org/mapping-scotland-project.

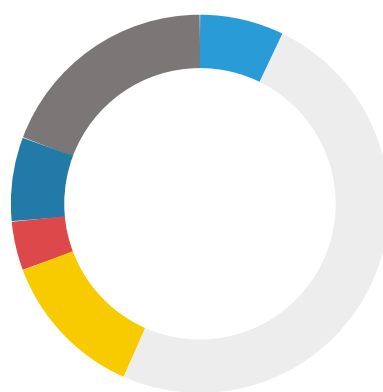


Schemes & services

In 2021, Scotland's 166 Community Transport operators delivered over 353 different transport schemes. While nearly half of operators ran just one scheme (49.4%), nearly 1 in 5 operators reported running 5 or more (19.3%).

A small albeit significant number of CTA members (7.2%) did not deliver any transport schemes last year, either as a result of restrictions or organisational difficulties during the COVID-19 pandemic, or due to their status as a public body – a local authority, for example – which supports rather than directly delivers Community Transport.

How many transport schemes or services do you operate?



0	7.2%
1	49.4%
2	12.7%
3	4.2%
4	7.2%
5 or more	19.3%

Which types of transport schemes or services do you operate?



Group Vehicle Hire (with a driver)	29.5%
Dial-a-Ride / Door-to-Door / Demand Responsive Transport	24.1%
Transport to Health & Social Care	22.3%
Self-Hire (without a driver)	21.1%
Day Hopper / Out & About Bus / Day Trips	17.5%
Training (related to transport)	15.1%
Volunteer Car Scheme	14.5%
Medication / Prescription/ Shopping Collection	12.7%
Community Bus Service (Section 22)	10.8%
School Transport	10.2%
Other	7.2%
Travel Club / Travel Share	6.0%
Bike / e-Bike Hire	4.8%
Mobility Scooter & Wheelchair Loan Service	4.2%
Car Club	3.6%
Taxi Voucher / Taxi Booking Service	3.0%
Bike Repair	1.8%
Driver Hire (without a vehicle)	1.8%
Garage (related to transport)	1.2%

Our research found that the most common transport scheme in 2021 was Group Vehicle Hire (with a driver), with 29.5% of operators in Scotland hiring out vehicles, usually but not limited to minibuses, to other local charities and community groups. This underlines the importance of Community Transport as a trusted steward of community assets, a contributor to community resilience and an enabler of the activities and impact of the rest of the voluntary sector.

Self-Hire (without a driver) (21.1%), delivering transport-related Training (15.1%) and School Transport (10.2%) are also vital sources of income for a significant number of operators.

The second most common scheme is Dial-a-Ride, Door-to-Door or Demand Responsive Transport (DRT), with nearly 1 in 4 operators delivering this kind of highly flexible and personalised service, which also represents more than 1 in 10 Community Transport schemes. DRT remains at the core of what the sector does.

The third most common scheme is Transport to Health & Social Care (22.3%), which is also a major focus of some Dial-a-Ride services as well as many Volunteer Car Schemes (14.5%). In 2021, around 1 in 4 Community Transport schemes provided non-emergency patient transport to help people – especially older or disabled people and those without access to private or public transport – to access health & social care facilities and services, such as GP surgeries, hospital appointments, care homes and respite care, as well as COVID-19 vaccination and testing centres.

In 2021, the Community Transport sector's contribution to Scotland's pandemic response and resilience remained impressive and important. Throughout the pandemic – typically with little or no funding or support from the public sector – local charities and community groups across Scotland sprang into action to protect the most vulnerable in our society, widen access to life-saving jobs and tackle health inequalities which the pandemic had exacerbated.¹⁶

Nearly 13% of Community Transport operators provided a medication, prescription or shopping collection service last year, many of which are now permanent or semi-permanent services after being created as an emergency response to the first 'lockdown' of 2020.

CASE STUDY

Upper Tay Transport

Upper Tay Transport in the Perthshire town of Aberfeldy aims to 'improve transport options in the area and to encourage and enable people to travel more actively and more sustainably where possible'. It has several initiatives to achieve this modal shift away from private cars, such as lift share, a free loan scheme for bikes and e-bikes and guided walking and cycling tours.

Community Transport operators continue to innovate, developing new services and adopting new modes to meet the evolving transport needs of their local community. In particular, tackling climate change by improving access to sustainable transport is a growing concern and opportunity for the sector, as it steps up its efforts to not only decarbonise its fleets, but also to empower people and communities to take climate action.¹⁷

¹⁶ www.ctauk.org/report-serving-scotland-during-covid

¹⁷ www.ctauk.org/scotlands-20-car-km-reduction-route-map-ctas-response

Just over 1 in 10 operators delivered a Community Bus Service in 2021, bringing back public transport to otherwise car dependent places which had previously been overlooked or underserved by commercial bus operators. An increasing number of operators are delivering Bike or e-Bike Hire schemes (4.8%) and Car Clubs (3.6%) – a third of which are all-electric – to increase active travel, reduce car use and accelerate modal shift.

CASE STUDY

Interloch Transport

Community Transport services play a vital role in supporting Scotland's older people to live happily, healthily and independently in their own homes and communities and reducing long-term costs for the health & social care system through prevention and early intervention.

Interloch Transport's grocery and prescription delivery service helps hundreds of older people across Argyll to maintain their independence and continue to live locally, rather than having to go into supported accommodation or a care setting. Rena, who is 83 years old, said: *"Without Interloch, I'd be in a care home right now. I've no doubt about that at all."*

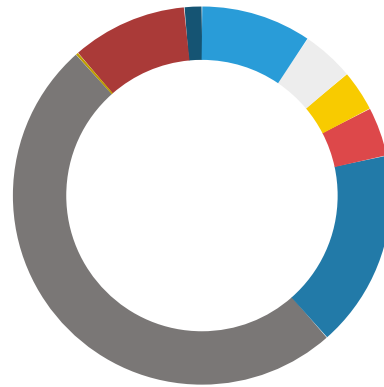
You can find out more about the transport schemes and services delivered by each of Scotland's Community Transport operators by visiting our map at www.ctauk.org/mapping-scotland-project.

Vehicles

From our research, we can estimate that more than 900 vehicles were owned or leased by Community Transport operators in Scotland in 2021, excluding those owned by or belonging to volunteer drivers.

The most common vehicle was the Accessible Minibus (49.9%) followed by the Minibus (16.9%). More than 2 in 3 Community Transport vehicles are some kind of minibus, which remains a symbol or even icon of the sector. 68.4% of Scotland's Community Transport overall fleet is accessible for people with disabilities or mobility needs.

What types of vehicle(s) do you have – and how many?



Cars	86 (9.5%)
Accessible Cars	41 (4.4%)
MPVs	31 (3.5%)
Accessible MPVs	37 (4.2%)
Minibus	152 (16.9%)
Accessible Minibus	449 (49.9%)
Bus	1 (0.2%)
Accessible Bus	89 (9.9%)
Van	14 (1.5%)

However, Community Transport is about so much more than the minibus. More than 1 in 5 Community Transport vehicles are Cars or Multiple-Purpose Vehicles (MPVs). This would be an even larger proportion if volunteers' own vehicles, which are almost always private cars, were to be included. There are also a number of vans and buses in the sector, in addition to other kinds of transport modes, such as bikes and e-bikes.

Given the challenges and costs of securing and retaining drivers with D1 licences required for larger, heavier vehicles, as well as supply chain delays and the cost-effectiveness of electric cars, it is likely that the proportion of Community Transport vehicles which are cars or MPVs will increase in the coming years as operators adapt their services towards smaller, lighter and electric vehicles.

The Community Transport sector's transition to net zero is well underway. In addition to operators' role in providing shared transport and facilitating modal shift, our research uncovered that there were 51 Electric Vehicles and 4 Hybrid Electric Vehicles in the Community Transport sector in Scotland in 2021. 12% of the sector's overall fleet is electric or hybrid. The sector is leading the way to net zero – by comparison, only 2% of all road vehicles in Scotland which are electric or hybrid, according to the most recent official statistics.¹⁸

The sector's progress in decarbonising its operations has been accelerated thanks to welcome financial support from Transport Scotland through the Plugged-In Communities Grant Fund administered by Energy Saving Trust. In 2022/23, after a highly successful and over-subscribed pilot round in 2021/22, £1.5 million will be invested in Community Transport operators to fund their purchase of zero-emissions vehicles.¹⁹

CASE STUDY

Mull and Iona Community Trust

Mull and Iona Community Trust was established in 1997 to support connectivity, economic development, housing and transport on the island. The Trust's Community Transport services support residents to access education, employment and health & social care as well as large numbers of visitors in the summer months.

The Trust received £75,000 from Transport Scotland's Plugged-In Communities Grant Fund in 2021/22 to purchase a Mercedes eVito Tourer L3 Pro, which is a wheelchair accessible electric vehicle with a significant battery range. It enables the Trust's drivers to complete multiple trips across the island – or even a return trip of over 5 hours and 100 miles transporting patients for essential medical appointments to Belford Hospital in Fort William – on a single full charge.

However, there remains a net zero funding gap in the sector. Continued public investment of this kind – but on much a larger scale – will therefore be required in the years ahead to support the whole of Scotland's Community Transport sector to meet the significant up-front capital costs of transitioning from petrol and diesel vehicles to electric, hybrid or perhaps even hydrogen vehicles. The commercial bus sector has, for example, benefited from far higher levels of investment from taxpayers to date in the decarbonisation and electrification of their larger fleets.²⁰

¹⁸ www.transport.gov.scot/publication/scottish-transport-statistics-no-39-2020-edition/chapter-1-road-transport-vehicles

¹⁹ www.ctauk.org/scotlands-plugged-in-communities-fund-2022-23-update

²⁰ www.transport.gov.scot/public-transport/buses/scottish-zero-emission-bus-challenge-fund

Although ongoing maintenance and running costs are significantly lower than with petrol or diesel vehicles, the upfront capital cost of EVs are relatively high and in many areas new enabling infrastructure, such as EV charging points, are required.

While the average cost of a new diesel minibus in the UK is currently around £60,000, electric minibuses can be 50% more expensive at an average of £90,000. Similarly, the higher average cost of an electric car or MPV (£44,000), electric van (£45,000) or electric bus (£400,000) remains prohibitive for many Community Transport operators.

CASE STUDY

Community Transport Glasgow

Community Transport Glasgow (CTG) has one of Scotland's first zero-emissions Community Transport fleets. With £1.2m of funding from Scottish Power Energy Network's Green Economy Fund, CTG has an all-electric fleet of 7 low floor minibuses, 4 standard minibuses, 2 people carriers, 1 van and 1 car.

The new fleet serves over 75,000 passengers every year in some of the least-affluent and -connected parts of the city – such as Drumchapel, Easterhouse and Shettleston – and reduced carbon emissions by 188 tonnes over 18 months. CTG's Graham Dunn, said: *"We will be focusing on climate change at the heart of our vision to reduce CO2 emissions as our main environmental ethos and building on our social purpose."*

CASE STUDY

Order of Malta Dial-a-Journey

Community Transport operators are collaborating and sharing assets with partners to help themselves and others to decarbonise. Order of Malta Dial-a-Journey host an Electric Vehicle charging station for Stirling Council at their premises by the Springkerse Park and Ride facility.

Duncan Hearsum, Chief Executive, said: *"As the leading Community Transport operator working across the Forth Valley, we want to take climate action and transition to a zero-emission fleet. Sharing an EV charging facility on our site will be a cost-effective way for us to start the shift to electric and will help us accurately evaluate our infrastructure needs."*

Our research indicates that 88% of the Community Transport sector's overall fleet of 900 or more vehicles has still to 'go green'. Given the types of vehicles in the sector, we can estimate that a further £87.4m of investment in the sector is likely to be required to decarbonise Community Transport and transition to a fully net zero emissions fleet nationally.

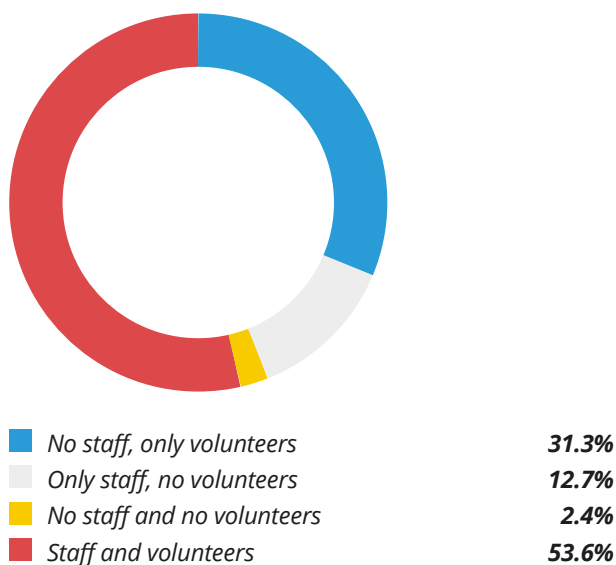
The local charities and community groups of the Community Transport sector will not be able to – and, as part of a just transition to net zero, should not – shoulder this financial burden alone. Some operators have launched large-scale, long-term fundraising projects or utilised their reserves to purchase EVs, while others have successfully secured financial support from the private sector. However, going forward, most operators will be wholly or partially reliant on some level of public funding to help decarbonise their fleets.

Staff & volunteers

The Community Transport sector has always involved a collaboration between paid staff and unpaid volunteers. As community-led organisations, the sector is well placed to harness the knowledge, skills and expertise of professionals alongside the energy, enthusiasm and diversity of communities to deliver transport solutions and build community wealth. Volunteers are the lifeblood of the Community Transport sector, which creates many opportunities for volunteering.

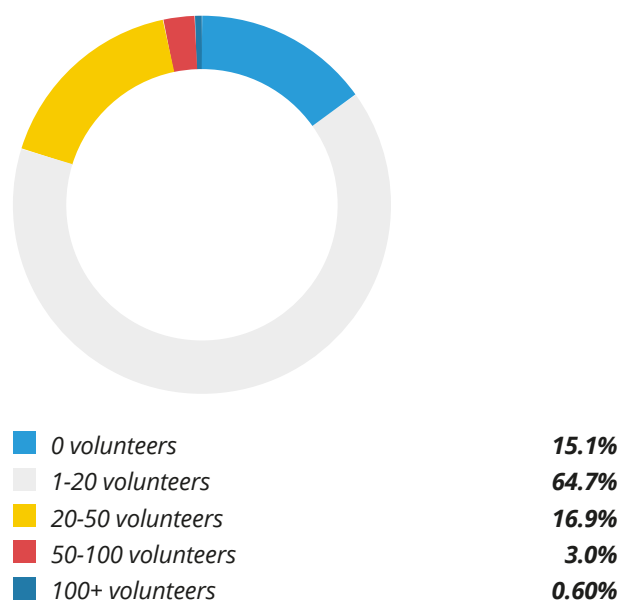
From our research, we can estimate that there were over 2,000 people volunteering in Scotland's Community Transport sector in 2021, an average of 12 volunteers per operator. Most operators (65.7%) have between 1 and 20 volunteers helping to deliver various transport schemes. A Community Transport volunteer commits on average over 50 hours a month or around 12.5 hours every week.

Do you have staff, volunteers, both or neither?



Around half of all Community Transport operators (53.6%) have staff and volunteers. Nearly 1 in 3 operators (31.3%) have no staff and rely solely on volunteers, especially Volunteer Car Schemes and Car Clubs. This is a result of the sector's precarious funding position which means that many smaller schemes simply cannot afford to hire part- or full-time employees. However, it also reflects the determination and community spirit which ensures that they still survive.

How many volunteers do you have?



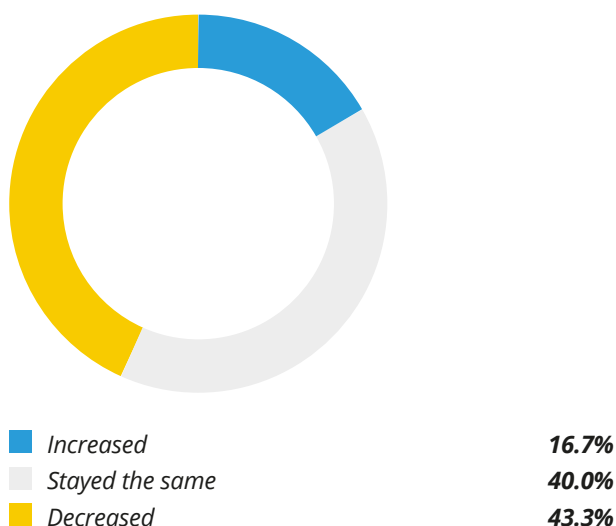
2021 was a difficult year for volunteering. In common with many other parts of the voluntary sector across the UK, much of Scotland's Community Transport sector struggled to recruit and retain volunteers in a challenging economic and public health context.

Over 43% of operators report recruitment of new volunteers decreasing last year as furlough came to an end and working hours surged above pre-pandemic levels; the cost of living increased and fuel prices soared; and the initial sense of urgency and the emergency response from communities to the COVID-19 crisis gradually dissipated alongside easing restrictions.²¹

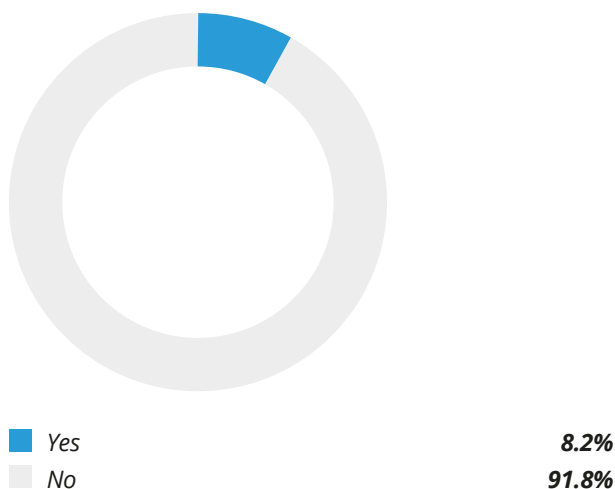
Only 16.7% of operators report increased volunteer recruitment in 2021, while just 8.2% were successful in attracting younger volunteers, which is a major and urgent priority for the sector given the ageing demographics of its workforce and volunteers. The lack of younger volunteers entering the sector poses a risk to succession planning.

Our research demonstrates that there is much still to do by operators – including stepping up efforts to reach out to younger and more diverse audiences – and by government – including reform by HM Treasury of the Approved Mileage Allowance Payment (AMAP) rate which reimburses volunteer drivers – to ensure a sustainable long-term future with affordable volunteering for all at its heart.²²

Did your recruitment of volunteers in 2021 increase, decrease or stay the same?



Did you attract young volunteers in 2021?



CASE STUDY

Larkhall and District Volunteer Group

Volunteers are the backbone of Larkhall and District Volunteer Group (LDVG) and essential to delivering their services in South Lanarkshire. Ann Rodger – who has volunteered with LDVG since 2017 as a driver, befriender, event organiser and trustee – won the UK Volunteer of the Year Award at last year's the Community Transport Awards after being nominated by the charity's manager, Sandra McCrory.

Sandra said: "Ann has a particular eye and ear for the older members of our community... She genuinely enjoys helping people and never expects anything in return. She is always upbeat and enthusiastic in her role and this rubs off on the people she helps and colleagues she works with. We are so lucky to have her."

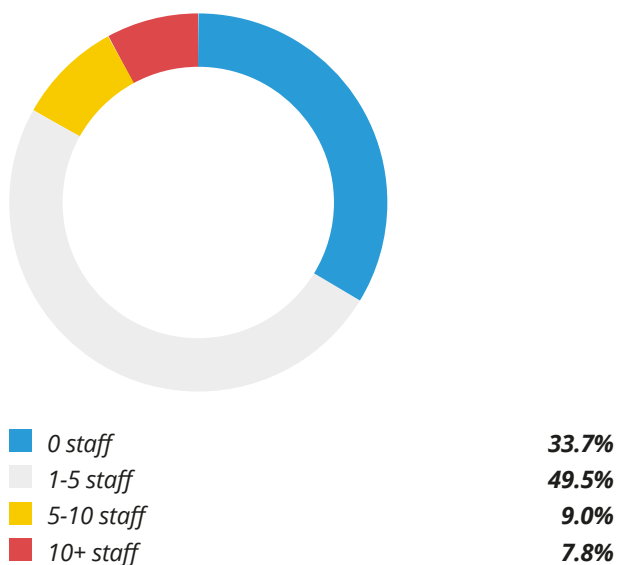
²¹ <https://researchbriefings.files.parliament.uk/documents/CBP-8898/CBP-8898.pdf>

²² www.ctauk.org/amap-campaign

The Community Transport sector creates jobs and builds community wealth. Our research suggests that 1,131 people were employed by Scotland's Community Transport sector in 2021, an average of 6.8 employees per operator. Most operators with staff are very small employers. Around half of the sector (49.4%) is composed of organisations with between only 1 and 5 employees, often in part-time co-ordinator or driver roles.

A smaller proportion of those organisations involved in the sector (12.7%) deliver non-profit transport services with staff only and have no volunteers, including public bodies, local authorities and educational establishments, which also tend to be larger employers, with 10 staff or more (7.8%).

How many staff do you have?



16% of Scotland's Community Transport operators were Living Wage employers in 2021, reflecting the sector's commitment to Fair Work. The real Scottish Living Wage, which is currently £9.90 per hour, is an 'independently calculated rate based on the cost of living and is paid voluntarily by employers'.²³ It is a cornerstone of Fair Work.²⁴

Given the severe inflationary pressures facing households, with many workers and their families struggling to make ends meet, earning a genuinely Living Wage which keeps pace with the cost of living is as important now as it ever has been.

Much of the rest of the sector would like to become, or has investigated becoming, Living Wage employers. However, the financial cost for smaller charitable organisations remains a major barrier, because budgets are so stretched and service or project funding often does not contribute to core operating costs. While more than 80% of Scottish workers earn the Living Wage, many charities struggle to afford to pay higher than the legal minimum for some roles.²⁵

CASE STUDY

Coalfield Community Transport

Coalfield Community Transport in East Ayrshire became an accredited Living Wage employer in 2021, the very first third sector organisation to do so in a region where average wages are significantly lower than the Scottish average.

Susan Dever, Project Coordinator, said: *"Our ability to move to become a Living Wage employer is as a direct result of the hard work undertaken by all staff to put Coalfield Community Transport on a firm financial footing. Making this change is something myself and the Trustees are delighted to do."*

²³ www.scottishlivingwage.org/what-is-the-real-living-wage

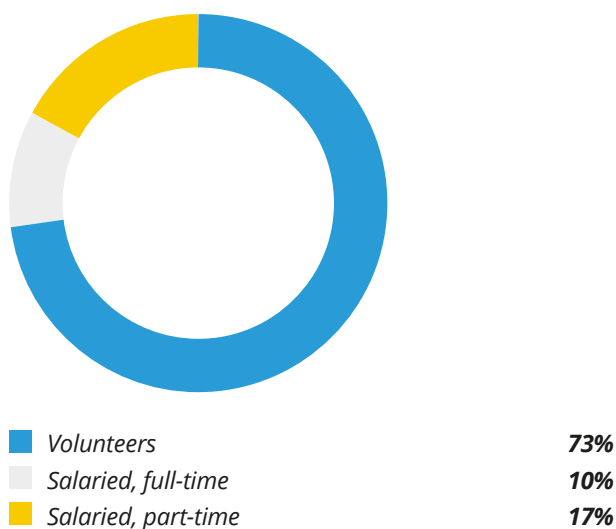
²⁴ www.gov.scot/policies/employment-support/fair-work-and-pay

²⁵ www.gov.scot/policies/employment-support/fair-work-and-pay

Meanwhile, a total of four operators reported having 'no staff and no volunteers' in 2021. There were four new Community Transport schemes under construction in 2021 with support from CTA in communities in Arran, the Borders, Edinburgh and West Dunbartonshire. This demonstrates the continued growth of the sector and rising demand for Community Transport in urban, rural and island communities across Scotland. These new and emerging schemes appear in our data with 'no staff and no volunteers', because they were not yet fully operational during the year under consideration.

From our research, we can estimate that there were 2,274 drivers completing journeys across the sector in 2021, an average of 13.7 drivers per operator. 73% of Community Transport drivers are volunteers and 27% are paid staff. 72.6% of the more than 3,131 people working across the sector, either as volunteers or employees, do so as drivers.

How many of your drivers are...?

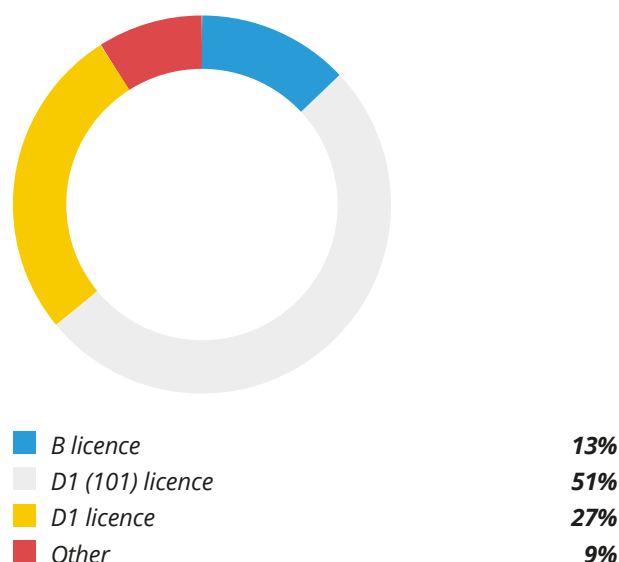


The licences which Community Transport drivers require depends on the service and the vehicle. 27% of Community Transport drivers hold a full D1 licence, which permits the holder to drive a 16-passenger seat minibus weighing over 3.5 tonnes and under 7.5 tonnes and to do so for hire or reward – in other words, as a salaried employee – for example as part of Community Bus Service, Dial-a-Ride, School Transport or Driver Hire scheme. More than half of drivers (51%) possess a D1 licence with a '101 exemption', which means they cannot drive these larger, heavier vehicles for hire or reward, thereby restricting them to volunteering.

The need for a D1 licence – which can be costly, complex and time-consuming to secure – is contributing to significant and growing driver shortages across the Community Transport sector, which is likely to threaten the long-term viability of some schemes.

13% of drivers hold a standard B licence, which allows them to drive smaller, lighter vehicles with up to 8 passengers, for example as part of Transport to Health & Social Care or Volunteer Car schemes.

Which licences do your drivers hold?



Passengers & journeys

Community Transport operators deliver or arrange a wide range of training opportunities for staff and volunteers, whether drivers, passenger assistants or others, to ensure a high-quality and professional transport service.

We found that the most common type of training is the Minibus Driver Awareness Scheme (MiDAS), which is the nationally recognised standard for the assessment and training of minibus drivers to enhance operations and safety and is administered by CTA.²⁶ Nearly half (47.6%) of Community Transport operators in Scotland put their drivers through MiDAS in 2021. First Aid, Health & Safety and Dementia Awareness training as well as how to operate vehicle tail-lifts, handle wheelchairs and support passengers are also widespread throughout the sector.

6.6% of operators put their drivers through training for a D1 licence, which is required by drivers who passed their test after 1 January 1997 to legally drive buses or minibuses for hire or reward.²⁷ However, the cost of doing so, the length of time required to complete and the 'poaching' of D1 licenced drivers by commercial bus operators, supermarkets and haulage firms for higher paid jobs are reported by CTA members as significant barriers which disincentivise more operators to do the same.

The Department for Transport's ongoing review of the licensing regime is welcome and could help resolve these challenges if, as proposed, drivers who have a category B licence are granted an entitlement to a D1 licence.²⁸

The collective impact and scale of Community Transport has often been overlooked due to the diversity of the sector and the size of many individual operators. Our research enables us, for the first time, to estimate the reach of Scotland's Community Transport sector. In 2021, Scotland's Community Transport sector delivered:

- Over 802,000 passengers
- Over 890,000 journeys
- Over 5.18 million miles

This means that the average Community Transport operator in 2021 in Scotland delivered:

- Over 4,830 passengers
- Over 5,360 journeys
- Over 31,200 miles

All kinds of people from all kinds of backgrounds and in all kinds of communities are Community Transport passengers, but the sector plays an essential role in supporting the most vulnerable in our society. Most Community Transport services support older people (54.2%) and disabled people or people with long-term conditions (51.2%). Older and disabled people remain the sector's core users due to operators' focus on accessibility and inclusion. CTA's long-term mission has been accessible, inclusive transport for all.

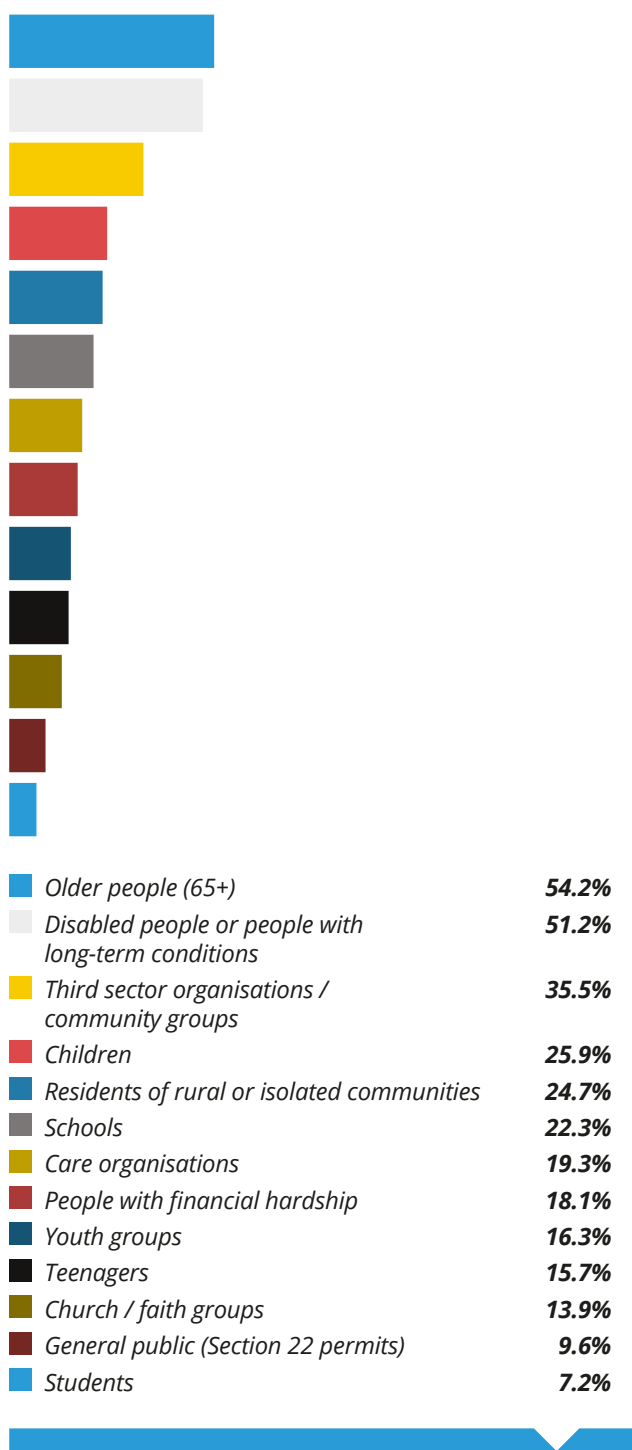
More than 1 in 3 operators (35.5%) provide transport for third sector organisations and community groups. The Community Transport sector is a major enabler of the rest of the voluntary sector, empowering and supporting them to do their important work and deliver impact.

²⁶ www.ctauk.org/training/midas

²⁷ www.gov.uk/driving-licence-categories

²⁸ www.ctauk.org/driving-licensing-review-call-for-evidence

Which categories of people or organisations used your transport services in 2021?



Many operators support young people, including children (25.9%), schools (22.3%), youth groups (16.3%), teenagers (15.7%) and students (7.2%). Community Transport is an important facilitator of access to learning, training, recreational and social opportunities for young people.

Nearly 1 in 10 operators (9.6%) transported the general public using a Section 22 permit in 2021. Community Transport continues to provide a lifeline service for residents of many rural or island communities, with a quarter of all operators (24.7%) providing such services. These are often lifeline services in places where local people and communities have had to step up to develop their own transport solutions due to a lack of public transport or after commercial bus operators withdraw services on 'commercially unviable' routes.

CASE STUDY

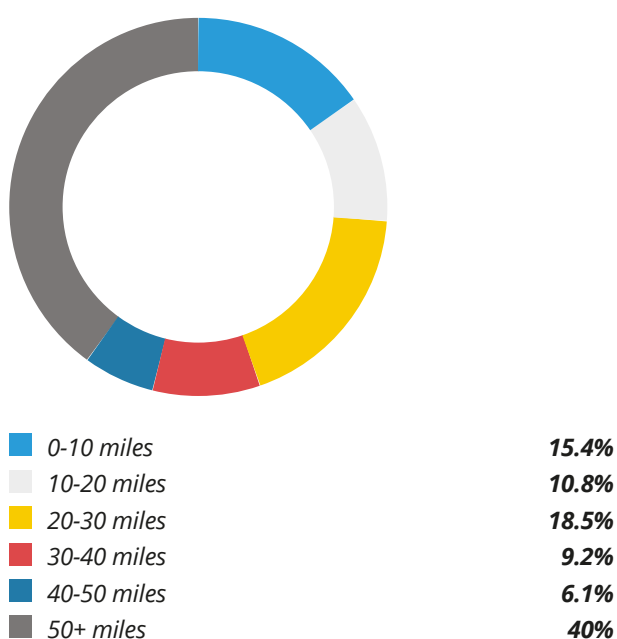
Killin and District Volunteer Car Scheme

Killin and District Volunteer Car Scheme (KDVCS) provide door-to-door transport for local residents in rural Stirlingshire 'who by reason of age, ill-health, disability or financial hardship need the provision of accessible transport to aid their mobility, alleviate discomfort and contribute to an improvement in their quality of life'. Local volunteer drivers help many older people in the village and the surrounding area to access medical appointments across Forth Valley and beyond.

Eileen is 73 years old and a regular passenger. She became reliant on KDVCS after losing her driving licence after being diagnosed with glaucoma. She said: *"The volunteers go above and beyond to make sure I reach critical healthcare appointments. These wonderful people ensure I am physically and socially supported, heard and connected to my community... The service they offer is priceless."*

Most journeys by Community Transport are local and therefore relatively short in duration and distance. However, our research illustrates that most operators have a larger 'maximum radius' and support journeys over longer distances, particularly in rural areas or as part of non-emergency patient transport to NHS sites for cancer, renal or other specialist services in more centralised locations. 15.4% of operators only completed journeys within 10 miles of their operation, but 40% of operators have a maximum radius of 50 miles or more.

What is the maximum radius of your operation?

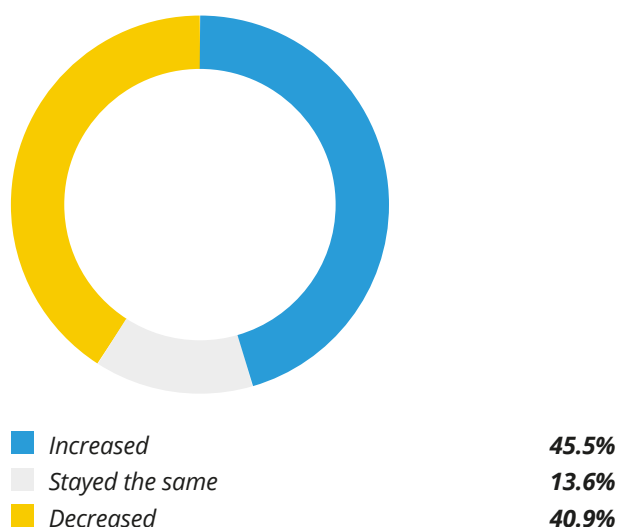


The COVID-19 pandemic had a severe impact on the transport sector as a whole in 2020 and again in 2021. Passenger and journey numbers fell sharply due to public health guidance, especially for vulnerable people in shielding categories, and unprecedented restrictions on movement and travel.

Unsurprisingly, therefore, around 2 in 5 (40.8%) Community Transport operators experienced lower demand in 2021. A number of factors contributed to this, from public health messaging which portrayed private transport as a safer option, to the rollout of online or hybrid learning and remote GP consultations reducing the need for Schools Transport and Transport to Health & Social Care respectively.

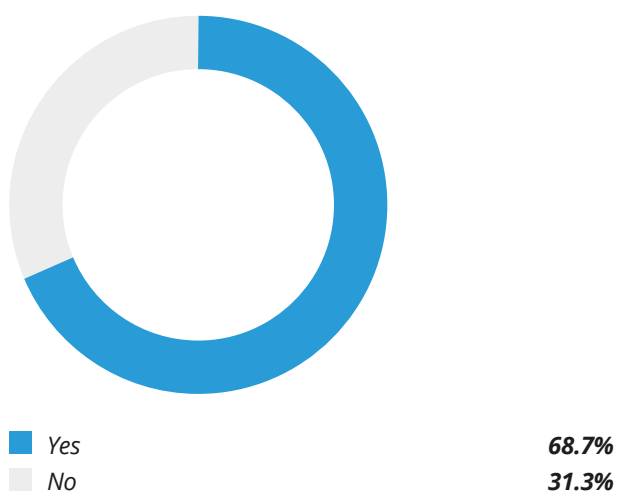
Nonetheless, nearly half (45.5%) of operators report that demand for their services actually increased last year despite the pandemic. Many people and communities were clearly desperate to re-connect with each other – or return to something like normal life by getting back in-person to college, school or the workplace – and depended on Community Transport to do so safely and sustainably.

Did demand for your transport services increase, decrease or stay the same in 2021?



More than 2 in 3 operators (68.7%) are seeking to expand their services in 2022, another reflection of the growing ambition of the sector as well as rising demand from people and communities. In the context of the soaring fuel costs, modal shift away from private transport and an ageing population, demand for Community Transport is highly likely to only continue to rise in the years ahead.

Do you want to expand your transport services in 2022?

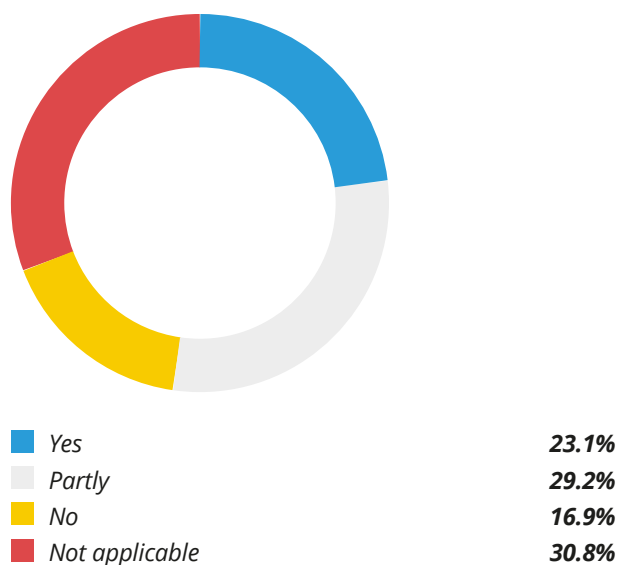


Community Transport operators have built collaborations and partnerships with stakeholders across the sector and beyond. Around 1 in 3 operators (29.5%) reported a 'continuous and positive working relationship' with a local authority in 2021, indicating that the relationship between the sector and local government remains more developed and significant than that with Scottish Government (5.4%) at a national level. Nevertheless, Transport Scotland is a vital funder of the sector through the Bus Service Operators' Grant, for example.²⁹

18.1% work directly with other Community Transport operators, while a similar proportion (15.1%) are part of a local Community Transport Forum, suggesting that there is room for CTA to lead the creation and growth of more local forums in large parts of the country.

A long-standing strategic aim of the sector has been to better integrate Community Transport services within the wider transport network to improve public awareness, encourage collaboration and ensure seamless multi-modal, multi-operator journeys for passengers. Our research suggests some positive signs of progress, with more than half (52.3%) of operators indicating that they 'feel integrated with other transport networks' to some extent. Mobility as a Service (MaaS) – which integrates different transport modes and operators as well as journey planning and payment functions into a single service – offers opportunities to accelerate this progress.³⁰

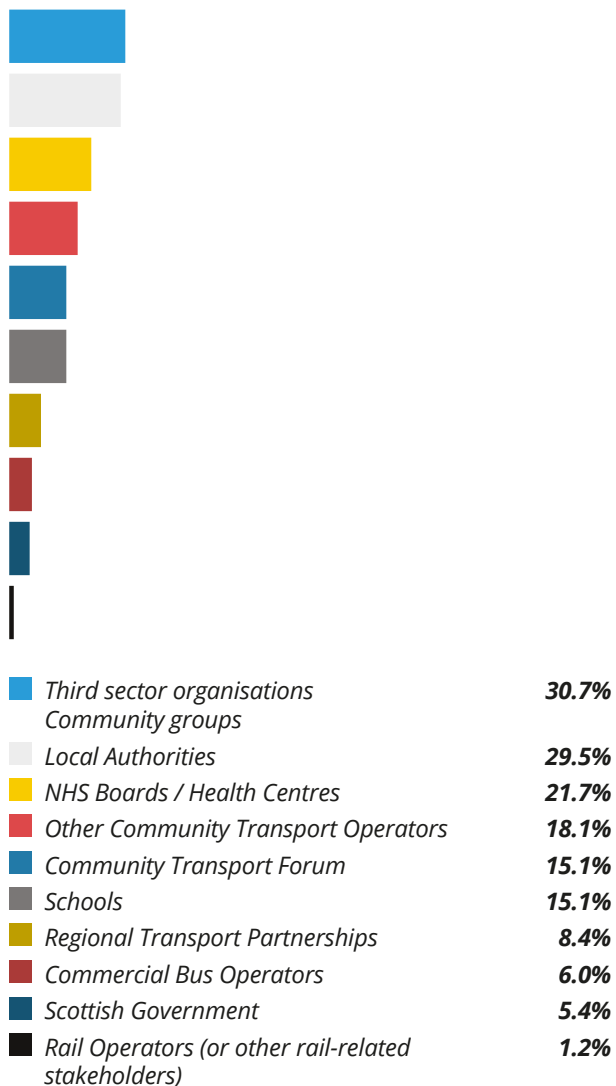
Did you feel integrated with other transport networks in 2021?



²⁹ www.transport.gov.scot/public-transport/buses/network-support-grant

³⁰ www.ctauk.org/maas-code-of-practice-ctas-response

Which categories of people or organisations used your transport services in 2021?



However, there is still some way to go. Only 8.4% of the Community Transport sector is participating in a Regional Transport Partnership, while even fewer operators have relationships with Commercial Bus Operators (6%) or Rail Operators (1.2%).

CASE STUDY

HcL Transport and Pilton Equalities Project

In response to the emerging issue of food insecurity in Edinburgh during the pandemic, Community Transport operators HcL Transport and Pilton Equalities Project joined with Scran Academy to form the 'Scran Meals Coalition' to tackle hunger, poverty and isolation by working in partnership and with stakeholders.

The coalition was developed with a simple idea: to 'not only serve portions of food, but portions of love and community'. It rapidly activated six production kitchens, enrolled or trained over 500 keyworkers and took referrals from over 100 agencies including GPs, the council, homelessness agencies, sheltered housing, schools and charities.

Scran Academy coordinated the preparation of nutritious and delicious meals, while HcL Transport and Pilton Equalities Project delivered to those most in need across the capital, including children, homeless people and those in shielding categories. At the height of the programme, over 7,500 meals were distributed every single week. Many recipients reported that the interaction with the drivers and volunteers was their only regular social contact.

Funding

Grants (38%) were the most common source of funding for Community Transport operators in 2021. Most often these grants come from local government, but also from national funding pots such as the Plugged-In Communities Grant Fund, or from charities, foundations and other non-profit funders. For example, the National Lottery (6%) appears to be the single biggest funder of the sector in Scotland outside of the Scottish Government or local government. Meanwhile, nearly 1 in 10 operators (9%) have Service Level Agreements with councils, the NHS and others to deliver or support access to local public services.

The Bus Service Operators' Grant – which was replaced by the Network Support Grant in April 2022 – was another important source of funding for the sector. 35% of operators received this discretionary grant for Community Transport operators with Section 19 or Section 22 permits last year from Transport Scotland.³¹

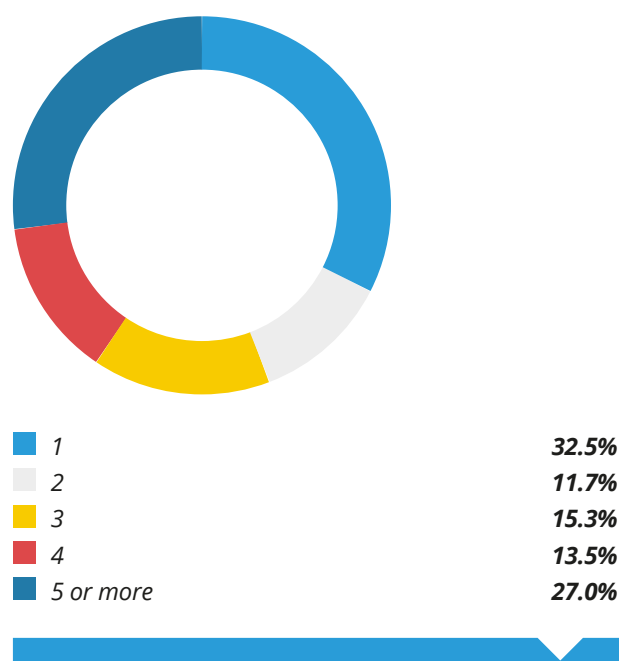
8% of operators received funding from reimbursement for concessionary fares under the National Entitlement Card for older and disabled people or the Young Persons' (Under 22s) Free Bus Travel scheme for their use of Section 22 services.³² However, these schemes are not eligible on Section 19 services which make up the vast majority of Community Transport services, discriminating against many older, disabled and younger people who rely on the sector because, for example, they live in a rural community without public transport.

Extending concessionary fares reimbursement to Section 19 services would not only deliver greater fairness for passengers, it would also be an important new source of funding for many Community Transport operators to help make their services more affordable and accessible.³³

A major source of funding for many operators are local people and communities, such as donations from the public and users (36%), fare income or other revenue from their members (23%), fundraising (19%), group hire income (18%) and legacies (3%).

At present, the sector is highly reliant on small-scale, short-term public funding, such as annual grants from local government, as well as the generosity of local people and communities, to survive. There is a need for adequate, fair and multi-year funding for the Community Transport sector which keeps pace with inflation, contributes to core operating costs and sets flexible conditions. Annual funding cycles, late payments and a lack of inflationary uplift for many years pose significant challenges for many operators, which are struggling to survive without the certainty they need to develop, plan and thrive for the long-term.³⁴

Sources of funding



³¹ www.transport.gov.scot/public-transport/buses/network-support-grant

³² www.transport.gov.scot/concessionary-travel

³³ www.ctauk.org/tackling-inequality-in-partnership-with-transport-scotland

³⁴ www.ctauk.org/scotlands-spending-review-ctas-call-for-multi-year-funding

What were your sources of funding in 2021?



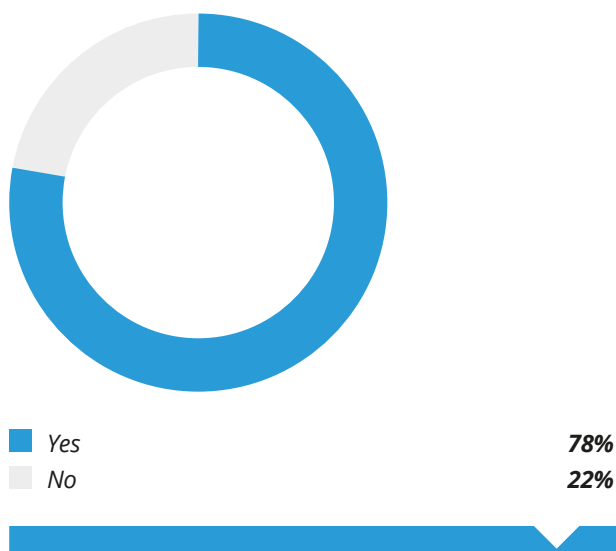
Grants	38%
Donation	36%
Bus Service Operators' Grant (BSOG)	35%
Fare income/income from members	23%
Fundraising	19%
Group hire income	18%
Contracts	9%
Service level agreements	9%
Concessionary fares	8%
Training	7%
National Lottery	6%
Revenue from other activities	6%
Lettings	5%
Trading arm	4%
Legacy	3%
Trust	3%
Consultancy	2%
Sponsorship	2%

Some operators have successfully expanded their sources of funding by diversifying their activities and income streams through delivering training (7%), a trading arm (4%), consultancy (2%), sponsorship (2%) and revenue from the organisation's other activities (6%). More operators will need to follow suit in order to become more secure and sustainable. Too many operators are dependent on just one (32.5%) or two (11.7%) sources of funding.

78% of operators felt supported by the UK, Scottish and local governments and other public bodies in 2021. Additional COVID-related financial support for the Community Transport sector was rolled out in 2020 and 2021, such as the Adapt and Thrive programme, the Third Sector Resilience Fund and the Supporting Communities Fund, as well as some additional funding through the BSOG. It was also welcome, and essential, that local authorities overwhelmingly maintained their funding for the sector as directed by the Scottish Government.

22% of operators disagreed, however. This suggests that greater support to make it through the challenges of the pandemic and manage inflationary pressures would have benefited a significant minority of the sector. Some operators were not eligible for or could not access any available funding, which left them in a precarious financial position during the COVID-19 crisis.

Did you feel supported by government and public bodies in 2021?



VIEWS OF CTA MEMBERS

"There was a lack of support available for us during lockdowns when use of our service was limited. We still had bills to pay, but we were not contacted or eligible for government subsidy."

"We had strong support from our council and the NHS – and significant funding."

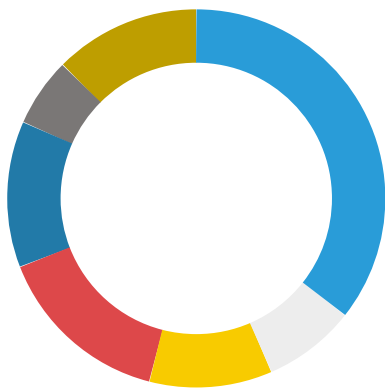
"We've had ongoing core funding from our council and the Health and Social Care Partnership for over a decade. The issue we have is that it never increases. Inflation has now had such an effect over the years that we have had a de facto drop – quite a significant drop."

"We benefited from lots of valuable advice and support from CTA."

"The support from local government has been above and beyond. But national government could do more for the sector financially."

As local charities and community groups, most Community Transport operators in Scotland are small organisations run on the proverbial shoestring. In total, 54% had a gross annual income of less than £100,000 in 2021, although a significant minority are larger operations which reported over £500,000 (18.4%) or over £1 million (12.5%) worth of revenue last year.

Gross Annual Income

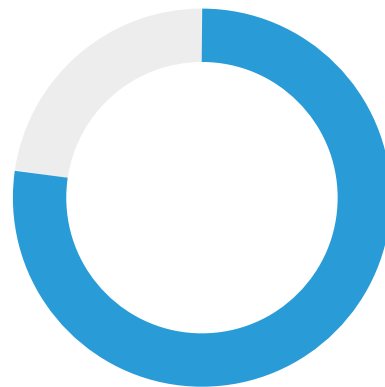


Under £25,000	35.6%
Between £25,000 and £50,000	7.9%
Between £50,000 and £100,000	10.5%
Between £100,000 and £250,000	15.1%
Between £250,000 and £500,000	12.5%
Between £500,000 and £1 Million	5.9%
Over £1 Million	12.5%

Despite the challenges of the pandemic, a large majority of operators (77.3%) reported feeling 'comfortable' with their level of unrestricted reserves in 2021. However, this may change in 2022 as a result of inflationary pressures causing large and unsustainable increases in equipment, fuel, labour and vehicle costs. Some operators are likely to cut back services in 2022.

Moreover, nearly 1 in 4 operators (22.7%) were already uncomfortable with their underlying financial position last year. Reduced levels of income from donations, fares and driver or vehicle hire as a result of COVID-19 forced some operators to reach into their reserves to pay their bills.

Did you feel comfortable with your level of unrestricted reserves in 2021?



Yes	77.3%
No	22.7%



Purposes & activities

Community Transport is about so much more than minibuses – it is even about so much more than travel. It is about connecting people and communities, supporting them to help each other to thrive in all sorts of ways. Our research has uncovered an extraordinarily rich array of non-transport activities which CTA members across Scotland, whether primary or secondary purpose, undertook in 2021.

From education projects and employability schemes to lunch clubs, sports teams and youth clubs, Community Transport operators are an integral part of the local economy and local community. They contribute to education, employment, health and wellbeing and provide services which tackle poverty and inequality, exclusion, social isolation and loneliness and climate change.

There was a total of 508 non-transport activities across the Community Transport sector in 2021, representing an average of 3 non-transport activities per operator.

More than 1 in 4 operators (27%) support social activities in their community, while around 1 in 5 (22%) deliver wellbeing, therapy, mental health or counselling services and support and over 1 in 10 (11%) are involved in befriending. 10% manage allotments or community-owned farms, gardens and woodlands, while 2% deliver local recycling programmes.

17% operate a food bank or community pantry, often in the most deprived neighbourhoods at the sharp end of the cost of living crisis where levels of food poverty and in-work poverty are high. 16% of operators are involved in giving formal or informal advice to local people or representing them in accessing benefits, public services or other support. Demand for these essential services will only increase in 2022 due to the cost of living crisis.

CASE STUDY

Mid Deeside Community Trust

Mid Deeside Community Trust was set up in 1996 by people in Aboyne, Banchory and the nearby area in Aberdeenshire to develop social, health, educational, cultural and economic projects which would help its communities to flourish.

The Trust delivers a wealth of Community Transport services. It operates a free Dial-a-Bus to link local villages with amenities, public services and retail. Its fleet of wheelchair accessible minibuses are available to rent by community groups. It offers transport to the nearest hospital and local GP surgeries through its volunteer car scheme. It also has a fleet of commuter and trekker ebikes for hire by residents and visitors.

However, it also has many exciting non-transport activities. The Trust owns and looks after two community woodlands. It supports a network of activities and clubs for older people in Aboyne, Ballater and Braemar to tackle exclusion and isolation. It has installed 15 Defibrillators and delivered training across Mid Deeside, in addition to offering other educational and language courses. It owns and operates a bike park for local children and young people and has completed refurbishment projects of other local parks and landmarks.

What other non-transport activities did you deliver in 2021?

Activity	Number of operators	% of CT operators
Advice/representation	27	16%
Allotment/Community Farm/Community Garden/Woodlands	17	10%
Arts	18	11%
Assisted Shopping	18	11%
Bakery	1	1%
Banking	2	1%
Befriending Project	18	11%
Caravan Holidays	1	1%
Catering	7	4%
Charity Shop/Other Shops	16	10%
Charity Work	11	7%
Childcare	5	3%
Community Electric Scheme/Electric Scheme	3	2%
Community Centre	14	8%
Community Events	18	11%
Community Link Worker	6	4%
Consultancy	6	4%
Digital	9	5%
Dining/lunch club/café	25	15%
Education/research/training	15	9%
Employability scheme/job club	7	4%
Faith	3	2%
Food bank/food deliveries/community pantry	29	17%
Grant funding/participatory budgeting	9	5%
Hairdresser	4	2%
Handyman/help exchange	4	2%
Health services	13	8%
Housing/housing support	5	3%
Industrial Park	1	1%
Information Services	10	6%
Intergenerational Activities and Services	5	3%
Languages	1	1%
Lettings	10	6%
Library	5	3%
Local Authority duties	10	6%
Mobility aids rental	2	1%
Museums	2	1%
Newspaper	2	1%
Paths, landscape, urban/rural planning	3	2%
Printing/stationery	5	3%
Shopping Service	18	11%
Repair/recycling programme	2	1%
Social Activities	44	27%
Sports and Recreation	27	16%
Team Building	2	1%
Wellbeing/therapy/mental health/counselling	36	22%
Youth clubs/services	12	7%

Nearly half of Community Transport services (48.8%) exist for social purposes, reflecting the sector's focus on delivering accessible, inclusive transport for all and bringing people and communities together. Through community development (16.9%) and citizenship (7.8%), operators help make our communities better places to live.

The sector contributes to improving physical and mental health and wellbeing, with a large number of operators declaring a purpose related to health (43.4%) or care/day centres (31.9%). Community Transport also plays a vital economic role by supporting access to education (25.9%), work (10.2%), shopping (38%) and tourism (6.6%), which builds community wealth.

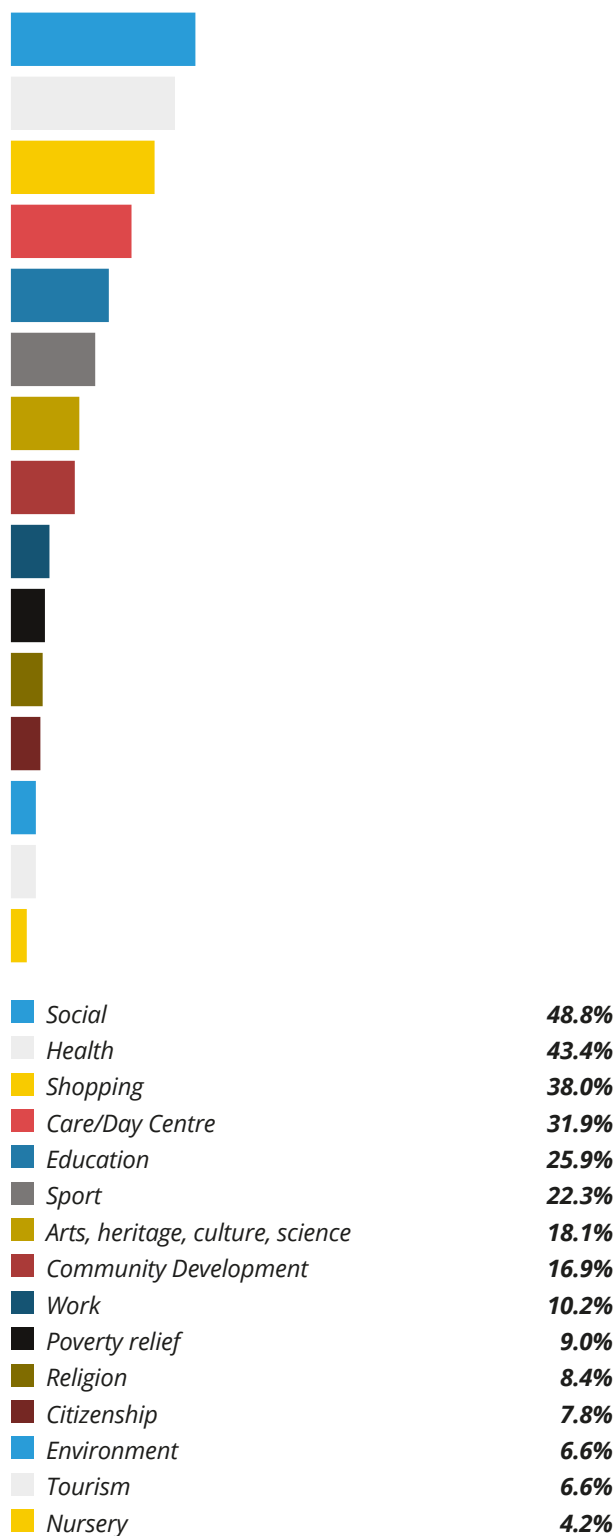
The environment (6.6%) is likely to become a more common and significant purpose for Community Transport in the future, as operators increasingly look towards net zero and empower local communities to take climate action.

CASE STUDY

Climate Action Strathaven

Climate Action Strathaven was established in 2020 by local people in the South Lanarkshire market town to bring the community together to reduce its carbon emissions, reduce car use locally and play its part in tackling climate change. The charity runs several exciting sustainability projects including a car club of three vehicles, including an EV, with more on the way; a fleet of e-bikes for rent; an e-cargo bike project with local retailers; and a bicycle repair workshop.

Which categories of people or organisations used your transport services in 2021?





CONCLUSIONS & RECOMMENDATIONS

1. Protect Funding for Community Transport

Fuel, labour and vehicle costs are soaring, as is demand for Community Transport from an ageing population. Yet our research demonstrates that many operators struggle to survive on shoestring budgets and run services on small, short-term grants without long-term certainty or stability. As we recover from COVID-19 and face a cost of living crisis, there is an urgent need to protect funding for Community Transport to prevent services which support the most vulnerable in our society from becoming unaffordable or being cut back in 2022 or 2023.

- a. Scottish Government, local authorities and other funders should deliver fair, adequate and multi-year funding for Community Transport which keeps pace with inflation, contributes to core operating costs and sets flexible conditions
- b. Local authorities and public bodies like the NHS should review and reform their procurement strategies to prioritise not-for-profit providers, build community wealth and deliver social value in service commissioning

2. Tackle Driver Shortages

Scotland's Community Transport sector is an important economic actor which builds community wealth and supports more than 1,100 jobs. However, our research exposes the growing shortage of drivers, especially of D1 licence holders, which is hampering operators. There is a need to tackle driver shortages, attract new talent and make the sector a great place to work and volunteer to protect its long-term future.

- a. Operators should invest in their drivers, whether paid staff or unpaid volunteers, and help them to upskill and to gain D1 licences

- b. Operators should offer Fair Work and pay at least the Living Wage

- c. CTA, Scottish Government, local authorities and other funders should explore how to provide financial support and training programmes which help operators, upskill drivers and fund the Living Wage

3. Deliver a Fair Deal for Volunteers

Many of the sector's more than 2,000 volunteers can no longer afford to continue to do what they love. Soaring inflation and record high fuel prices are putting community-led, volunteer-run Community Transport services at risk. There is an urgent need for reform of the AMAP rate of 45p per mile from the UK Government to ensure it meets the real costs of motoring.

- a. HM Treasury should deliver an inflationary uplift to the AMAP in the Autumn Budget to ensure volunteering is accessible and affordable for all
- b. CTA should develop new support and programmes to help operators to attract, retain and develop volunteers and improve succession planning
- c. Operators should engage with young people and under-represented groups and communities to improve equality, diversity and inclusion and secure new volunteers

4. Close the Net Zero Funding Gap

Community Transport is leading the way to net zero – 12% of the sector's national fleet is electric or hybrid, compared to just 2% of all road vehicles in Scotland. However, the sector faces a net zero funding gap, as the higher upfront capital costs of EVs are prohibitive for most operators. Our research estimates that £87.4m of investment is likely to be required to decarbonise the sector.

- a. Transport Scotland should build on the success of the Plugged-In Communities Grant Fund and scale-up funding for operators to decarbonise their fleets and empower communities to take climate action
- b. Funders should deliver new and scaled-up financial support to help operators to purchase EVs and decarbonise their fleets
- c. Operators should identify climate action, modal shift and sustainability as core purposes
- d. Local authorities should collaborate with operators to deliver sustainable transport solutions which accelerate modal shift, reduce car use and reduce carbon emissions
- e. CTA should develop new expertise and resources to advise and support operators on their transition to net zero
- f. CTA should create new forums as platforms for collaboration, partnership and peer-to-peer learning between operators on climate action, decarbonisation and EVs

5. Targeted Local Support for Community Transport

Community Transport has a strong presence in urban, rural and island communities throughout Scotland. The sector's diverse geographical profile is explained by complex geography, unmet transport needs, community leadership and council backing. Community Transport is most widespread in Orkney, Highland and Glasgow, but under-represented in East Dunbartonshire, Inverclyde and Fife, illustrating the need for targeted local support for the sector.

- a. Local authorities and CTA should engage with people and communities where there is no Community Transport to help create new Community Transport schemes and address unmet transport needs
- b. Local authorities should create Community Transport Coordinator roles to work with and provide adequate, fair and sustainable funding for local operators
- c. CTA should create new local or regional forums as platforms for collaboration, partnership and peer-to-peer learning between operators

6. Invest in Transport to Health & Social Care

Non-emergency patient transport is one of the most common and important types of Community Transport scheme. The sector made a major contribution to Scotland's pandemic response in 2021, protecting the most vulnerable and widening access to vaccines. However, there is a lack of public funding for the sector's work helping older and disabled people to access GP or hospital appointments and live happier, healthier and more independent lives for longer in their own homes and communities.

- a. NHS, National Care Service and Health & Social Care Partnerships should work in partnership with CTA, local authorities and operators to develop, deliver and fund health & social care transport schemes
- b. Health & Social Care Partnerships should create Transport Coordinator roles to work with patients, users, communities and operators to ensure everyone can affordably, fairly and sustainably access NHS and National Care Service sites
- c. Health & social care professionals and services should work with CTA and local operators to signpost eligible patients and users to health & social care transport schemes

7. Improve Digital Capacity and Communications

More than 1 in 4 Community Transport operators do not have a website. A similar proportion has no presence on social media, where new, more diverse and large audiences can often be reached. Many internal processes which could be digitised remain paper-based and inefficient. There is a need for all operators to be accessible and visible online, as well as to make the most of technology.

- a. Operators should improve their online presence and communications to widen access, reach new audiences, attract younger volunteers and improve relationships with funders
- b. CTA, funders and stakeholders should provide advice, support and training for operators to build their digital capacity, infrastructure and skills

8. Fairness in Concessionary Travel

Over 68% of Scotland's Community Transport fleet is accessible. But the National Entitlement Card for older and disabled people and the Young Persons' (Under 22s) Free Bus Travel scheme can only be reimbursed on Section 22 services, which represent just 5% of schemes. Many people eligible for concessionary travel rely on Community Transport's Section 19 services, especially if they live in a rural area or have a disability, leaving them unable to benefit and often out of pocket.

- a. Transport Scotland should extend eligibility for concessionary travel to Section 19 services to end discrimination, deliver greater fairness and improve affordability for passengers

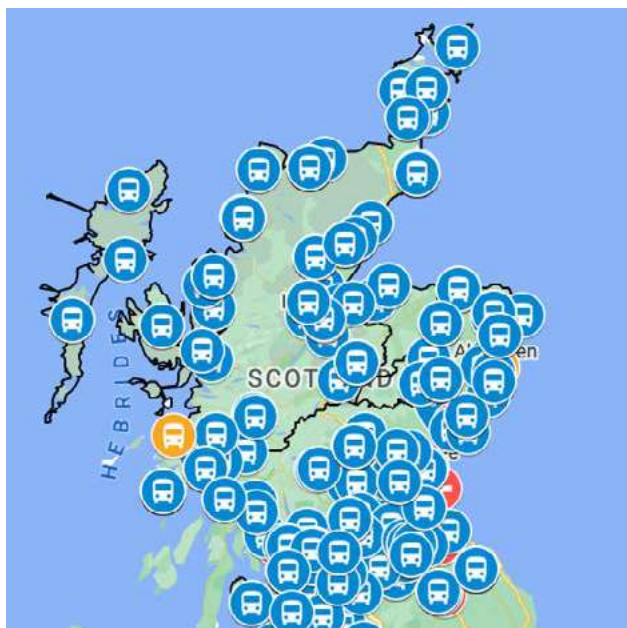
9. Deliver Sustainable Transport for All

Community Transport operators collaborate and partner with stakeholders across the sector and beyond, but there remains significant room for improvement. A long-standing strategic aim has been to better integrate Community Transport within the wider transport network to deliver seamless journeys for passengers. The Climate Emergency is an urgent imperative to do so.

- a. Scottish Government and local authorities should deliver sustainable transport for all by ensuring Scotland's public transport network is accessible, affordable and attractive
- b. Scottish Government and local authorities should integrate Community Transport within the wider transport network
- c. MaaS platforms and projects should integrate Community Transport as far as possible and provide capacity building programmes tailored to the sector



ACKNOWLEDGEMENTS



Our thanks to our members, stakeholders and supporters for making this report possible.

The views and conclusions in the report are those of CTA and should be attributed to CTA. CTA takes responsibility for the content of the report, including any errors.

Report Author

David Kelly, Director for Scotland, CTA

Community Transport Map

Our interactive, online map of Community Transport in Scotland is available at

www.ctauk.org/mapping-scotland-project.

Join the Conversation

Follow us on Facebook, LinkedIn or Twitter

@CTAUK1 and join in the conversation with the hashtag #MoreThanaMinibus.

Further Information

Please visit www.ctauk.org/mapping-scotland-project, follow us on Twitter

@CTAUK1 or email us at scotland@ctauk.org.



**community transport
association**

Community Transport Association

Scotland Office
83 Princes Street
Edinburgh
EH2 2ER

0131 220 0052
scotland@ctauk.org

www.ctauk.org

 twitter.com/CTAUK1

 facebook.com/CTAUK1

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

© CTA 2022

Charity registered in Scotland no. SC038518