Mapping England

State of the Sector
Report 2024

community transport association

Foreword by Caroline Whitney, CTA Director for England

Mapping England is first State of the Sector research on England's Community Transport Operators since 2014. It is a thorough examination of Community Transport Operators (CTOs) in England that aims to provide a vital source of information for CTOs, policy makers, funders, volunteers and the other stakeholders that use, fund or link with CTOs.

It is vital for our sector that we understand the scale and operations of Community Transport. This report forms a baseline: it provides a snapshot of the sector that can be used to identify changes in future years and differences with provision in other countries in the UK. We at the CTA will use the information you have given to design suitable support for CTOs as well as providing evidence to policy makers about the issues faced in the sector. Moreover, we can build on many of the findings to identify greater details about the different types of trips made by operators, their value to passengers and the wider public sector.

Thank you to everyone who has contributed to this research, including the CTOs who took the time to complete detailed returns, the operators and stakeholders who met to guide the research and ensure that we were asking the right questions in the right way, and the CTA staff who promoted the survey, contributed to drafting and analysing the data, and offered valuable insight throughout.

We hope you find this research useful, but we do not want this work to stand still. Mapping England research will continue with further analysis of the data and detailed investigations into several of the issues raised through the survey. We will continue to feed out findings that are relevant to current policy debates and ensure that our research and insight is used to promote the fantastic work undertaken by Community Transport Operators.

Contents

Headlines

Mapping England is the first state of the sector survey for Community Transport in England since 2014. The research is intended to provide an updated overview of England's Community Transport Organisations (CTOs), their services, staff, volunteers, income and vehicles, to show the scale and breadth of the work delivered by CTOs across England.

The results of the survey show the diversity of our sector including the range of different sized organisations from smaller volunteer-run groups (including a large and under-represented volunteer car scheme sector) to larger operators, running services in multiple locations. It includes dedicated transport operators, but also many organisations running transport to support other charitable purposes. Different types of services are being provided, to meet the needs of the many types of passengers, the varying reasons for travel, and the range of rural and urban environments that services operate in.

Mapping England results show CTA members reaching over 13 million passengers a year, providing accessible transport options for those who would not usually be able to travel. They show a sector experiencing growing demand, but also a sector that needs support to recruit the necessary staff and volunteers and provide sustainable funding for operations and vehicles.

For the Community Transport Association, the results of this survey will be vital for informing the support offered to the sector and providing evidence to stakeholders. Moreover, this data will constitute a baseline, to show changes in future years and compare the different characteristics of the sector in the different countries within the UK.

Derbyshire Community Transport

CTA's key policy areas were set out in the CTA manifesto: below is a summary of some the key results in these areas:

Modernising for Growth

Recruiting volunteer drivers with a D1 license entitlement (allowing them to drive minibuses) is critical for CTOs. 45% of volunteer drivers with a D1 category license hold this entitlement as they received their license before 1997, whilst 31% of volunteer drivers only have a 'B' license. As drivers need to re-apply for licenses aged 70, the number of drivers with the D1 entitlement will fall by a fifth in the next five years and continue to reduce after that, limiting the number of potential volunteers able to drive larger minibuses every year. Granting D1 entitlement to new category B licence holders would increase the available pool of potential volunteer drivers, especially amongst younger people. CTA is regularly engaged with the government on this issue and will continue to lobby new ministers for change.

In England, over 34,000 section 19 permits and 821 section 22 permits were issued between 2018 and 2023, but for many of these permits, information is limited and varies between different designated bodies. Equally, volunteer car schemes are an important part of the Community Transport sector but are underrepresented in the CTA membership and not included in current permit structures. CTA is working with the Office for Transport Commissioner and the Department for Transport to provide clarity on operating licensing guidance and the role of small vehicle permits.

37% of operations currently use journey planning software. This percentage rose according to income, from 13% of operators with an income at £25k or under, to 69% amongst operators with an income over £1million per year. Amongst those using software, 17 different systems were identified, not including several bespoke systems. Whilst it is unlikely there is a 'one size fits all' solution, discussion of the best journey planning software for Community Transport could arrive at common solutions that increases operational efficiency, staff understanding and enables common data to be collected and shared with transport planners. CTA will discuss this issue with England forums to understand the best way forward.

Bookings in the Community Transport sector are still predominantly done by phone. Whilst this may be the most convenient option in most cases, there are opportunities to increase the 22% of organisations taking booking through a website or the 2% currently using an app. Increased digital capacity in passenger bookings can improve integration with other services, efficiency of operations and potentially passenger experience, with the proviso that no passengers should ever face digital exclusion. CTA will continue to work with digital providers, to showcase new solutions and evaluate their effectiveness for the sector.

Improving Access to Health and Social Care

68% of CTOs are making journeys to health-related destinations and 60% are travelling to social care. However, only 29% are in contact with health services and this disconnect makes it difficult for CTOs to organise coordinated travel to health services or receive adequate funding to support these journeys. Equally it means that passengers who have a transport and health-related need may be unsure of their Community Transport options. The CTA manifesto sets out possible routes to improved partnership working with health services and we will continue to look to opportunities for CTOs to engage with local health services through our policy programme.

More encouragingly, 65% of CTOs feel well connected to their VCS, meaning that another manifesto priority, improved integration with social prescribing partnerships, should theoretically be easier to achieve. However, this integration is also dependent on better partnerships with health trusts to ensure that CTOs are integrated into planning and receive funding for their activities.

Investing in Community Solutions

Funding and finance issues were the 2nd highest priority for CTOs behind recruitment and included concerns over continued funding, as well as rising costs. 77% of CTOs receive grant income and grants are in the 3 highest sources of income for 81% of these organisations. Grant income is therefore critical to CTOs, but it is time-limited and reapplying or finding new grants is a major drain on staff resources. CTA will continue to call for more sustainable funding from local government (and 62% of respondents were receiving funds from local authorities) to allow long-term planning, reduce administration and keep pace with inflation.

Ensuring Community Transport is a part of key government schemes, partnerships and strategies is a central aim for CTA. Currently, half of respondents disagreed that they were part of local transport decision making. There remains a clear need for representation at a national and regional level to ensure that local guidance includes CTO involvement for Local Transport Plans, Bus Service Improvement Plans, Bus franchising and other transport planning.

Community bus routes, run through section 22 permits, were being operated by 24% of respondents. These were more likely to be run by CTOs operating in rural areas. There has been a growth in the number of section 22 permits issued, potentially because these services offer the possibility of meeting transport need following the withdrawal of bus routes. CTA will continue to gather intelligence and best practice to inform the provision of community bus routes.

Accelerating Community-Led Climate Action

The CTA manifesto identifies the need to encourage the uptake of electric vehicles. In England, only 3% of identified vehicles were electric. Cost and funding issues were a major barrier for those without EVs and comments noted that expensive EVs can appear less cost effective than cheaper ICE vehicles. Moreover, charging infrastructure, both at depots (if the organisations has one) and in public, remains an issue. The take-up of EVs appears to be lower in England than Scotland and CTA are planning further work to identity policy and practical solutions to overcome barriers to adoption.

39% of diesel vehicles were older than Euro 6 rating, meaning that they have the potential to be charged if accessing a Clean Air Zone. Most CAZ areas have a Community Transport exemption and most of these vehicles will not be in CAZ areas, but these exemptions are time-limited and there remains a need to replace many of these older vehicles. The CTA will continue to liaise with authorities to ensure that Community Transport is included in exemptions and funding for replacements, as well as looking to encourage all sources of funding for new vehicles.

Delivering a Fair Deal for Volunteers

Volunteers are essential to the existence of Community Transport. Respondents to the survey had 4279 volunteers during 2022/3, which equates to nearly 16,000 if factored up to CTA England members.

However, volunteering numbers have seen a general decline across the voluntary and community sector. Amongst survey respondents, 37% of CTOs had seen a decline in volunteer recruitment in the past year. Most organisations were also seeing rising demand and 67% did not think they had sufficient volunteers to meet demand for their services.

Community Transport has several factors that can limit recruitment, from the shrinking numbers of drivers with a D1 entitlement that limit the pool of potential volunteers, to the increasing cost of living that can limit available time for volunteering and rising cost of motoring that can act as a deterrent.

Recognising these pressures and noting falling number of volunteers and rising demand, CTOs named recruitment as their biggest priority in the coming year. CTA has already started to provide more support and opportunities for peer learning in this area and will continue offer this through Community Building Sessions and bespoke learning opportunities.

What next?

Mapping England results provide a valuable snapshot of the sector, which will an important source of evidence for Community Transport stakeholders. It provides evidence that will support the development of solutions to issues identified in the CTA manifesto, but also highlights new issues that are important to CTA members in England, with wider relevance for CTOs throughout the UK. Further research, policy work and support programmes will be informed by this research, which we hope will help members continue to provide vital accessible transport to passengers throughout the country.

1. Community Transport Organisations (CTOs)

Community Transport is operated by a wide range of organisations, of different sizes, structures and purposes. Analysis of the Community Transport Association membership, permit details and the Mapping England response show that within the sector there is no such thing as a typical Community Transport Operator (CTO).

Understanding the range of operators and organisations involved in the sector is vital for designing suitable support, training and engagement for CTA members and ensuring that stakeholders have an accurate view of Community Transport. For example, the Mapping England research showed that a significant proportion of CTOs have an income of under of £25k per year. These smaller groups have distinct needs, many of which are highlighted through the research.

Primary and secondary purpose operators will be referred to throughout this report. For the survey, organisations were asked whether their organisation was a primary purpose operator (their organisation's main occupation is road passenger transport) or a secondary purpose operator (the organisation provides transport to support another activity, which is their main occupation and generates most of their income).

CTO's with an income of over £1million per year are most likely to be Secondary Purpose organisations, who provide transport to support their main purpose. However, secondary purpose organisations were only devoting about 28% of their income to Community Transport on average. There are also several larger Primary Purpose organisations, dedicated to transport, with larger fleets and opportunities to provide extensive community or contractual services.

Over 34,000 section 19 permits had been issued in England over the past five years. The CTA is the largest designated body and had over 5000 active section 19 permits at the time of publication. 821 section 22 permits were issued in the same period, indicating community bus routes have been a growing form of provision, since legislation changes in 2008.

1.1 Mapping England and the CTA membership

The Community Transport Association membership for England is 941 organisations, which is 72% of the overall UK membership. The breakdown of the England membership is shown in figure 1.1.[1]

Fig 1.1: CTA England membership

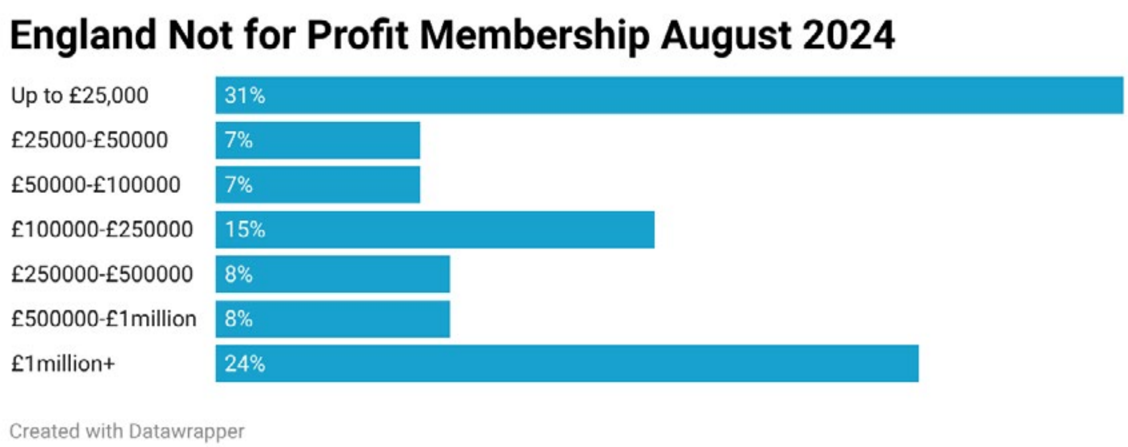
CTA England membership by type

Type of member	England Members
Not for profit	742
School or educational body	124
Public body	48
Group membership	27

Created with Datawrapper

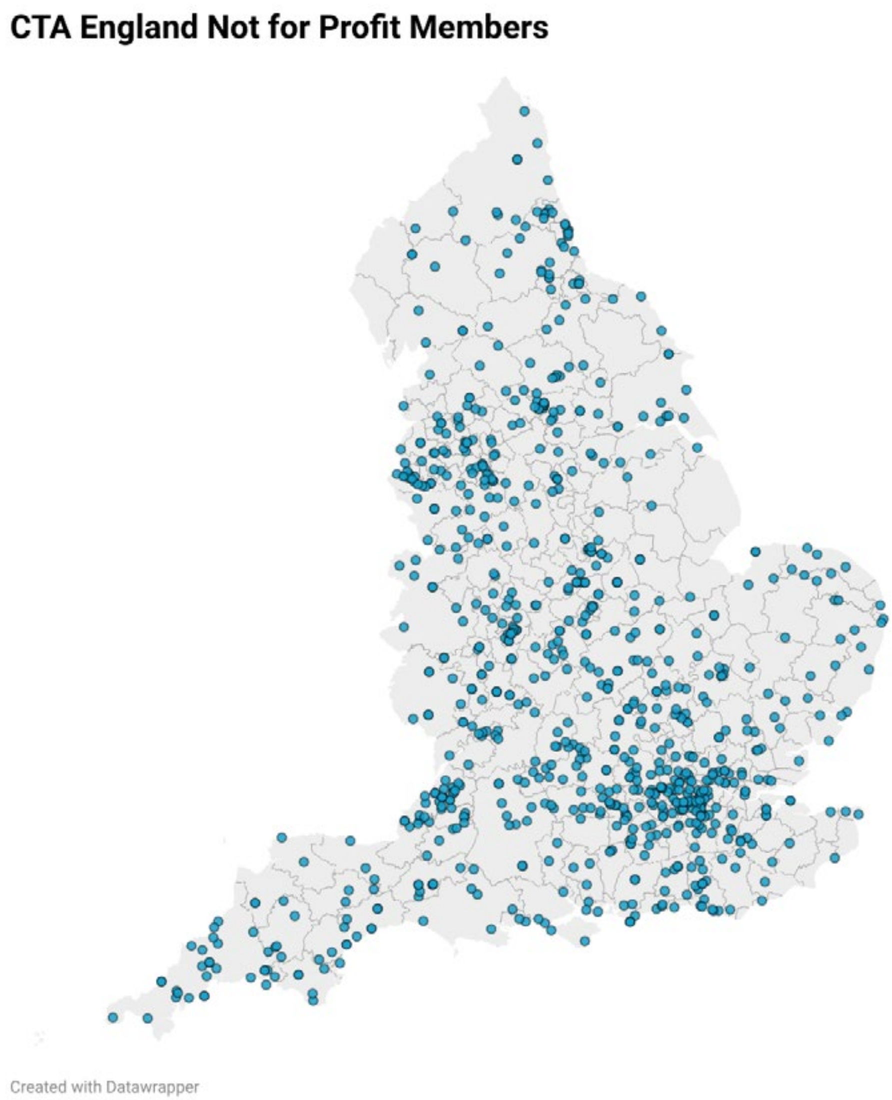
https://datawrapper.dwcdn.net/gOJoA/2/

Fig 1.2 CTA England membership by income



1 The overall response to the Mapping England survey is compared to the CTA membership in section 8.

Fig 1.3 CTA England membership by location



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The CTA membership is segmented by organisational income. As shown in figure 1.2, almost a third of non-profit members have an income of less than £25k per year. Equally, a quarter of members have an income of over £1million. This means that our members face different challenges, from smaller CTOs running a volunteer-led organisation, to larger organisations with staff and large fleets of vehicles. Some of the different characteristics and challenges for these organisations will be discussed through the report.

Locations of members are shown in figure 1.3. The CTA has members throughout the country with a particular concentration in the South East.

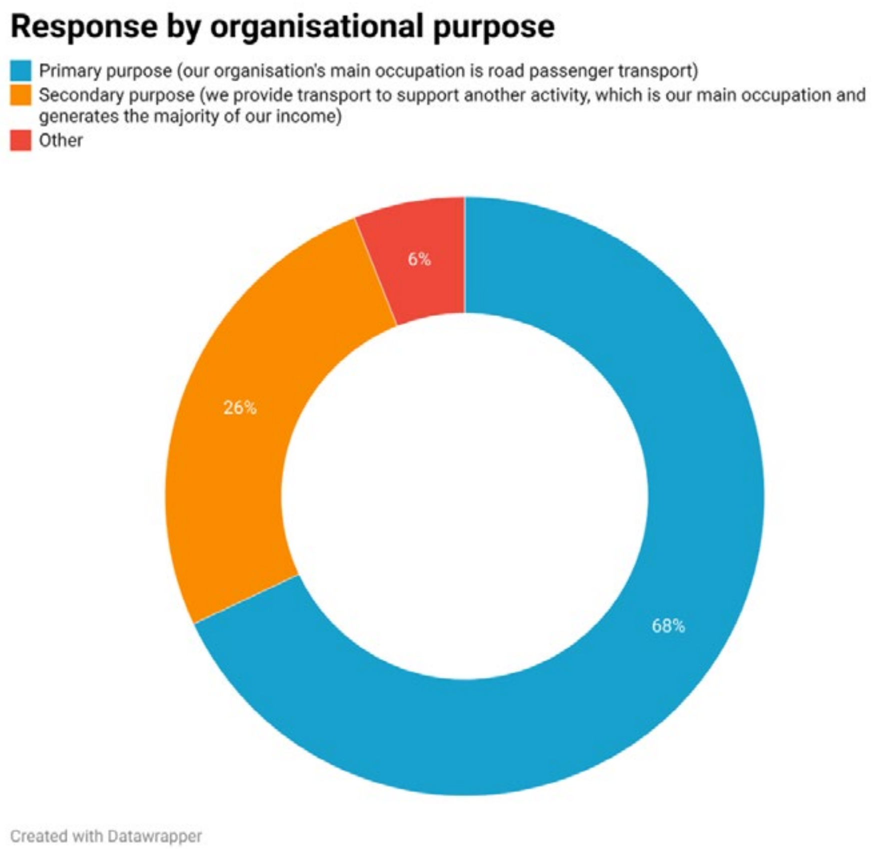
Section 8 discusses the survey development and compares the response to the CTA England membership. The survey response is broadly representative of membership in terms of income and geography,

1.2 Primary and Secondary Purpose Operators

CTOs are a diverse group and provide transport for different reasons. CTOs may solely provide transport services or run a transport operation as a subsidiary to another occupation. Primary and secondary purpose operators will be referred to throughout this report. For the survey, organisations were asked whether their organisation was a primary purpose operator (their organisation's main occupation is road passenger transport) or a secondary purpose operator (the organisation provides transport to support another activity, which is their main occupation and generates most of their income). Whilst this is a simplification of the differing purposes that organisations serve, it provides a broad distinction that allows comparison between the two groups.

Figure 1.3 shows that the response to the survey was higher amongst primary purpose operators. This reflects previous state of the sector research in England. The CTA membership shows a slight weighting towards primary purpose operators, but not to the same extent as the survey response. The large proportion of primary purpose operators replying to the survey reflects their level of engagement with the CTA.

Figure 1.4: Response amongst Primary and Secondary organisations (Base=260)



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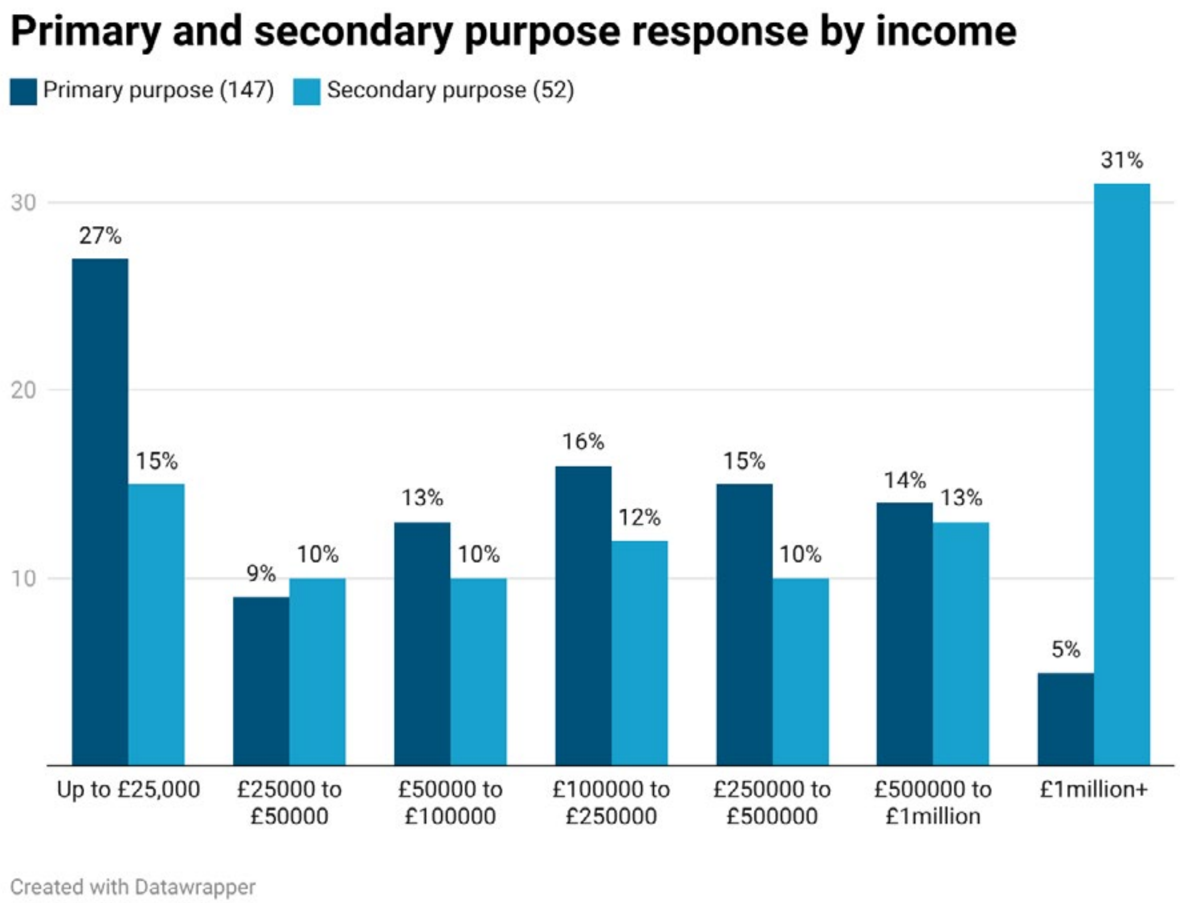
Splitting these organisations by annual income shows slight differences at either end of the income scale. Figure 1.5 shows that a higher percentage of primary purpose operators were small organisations, whilst nearly a third of secondary organisations had an annual income of over £1million.

However, it should be noted that not all this income will be directed to Community Transport. As a broad guide, primary purpose organisations noted that 88% of their income was dedicated to Community Transport on average, whilst this was only 28% amongst secondary purpose operators.

Figure 1.5: Primary and secondary purpose operators by income (bases in brackets)



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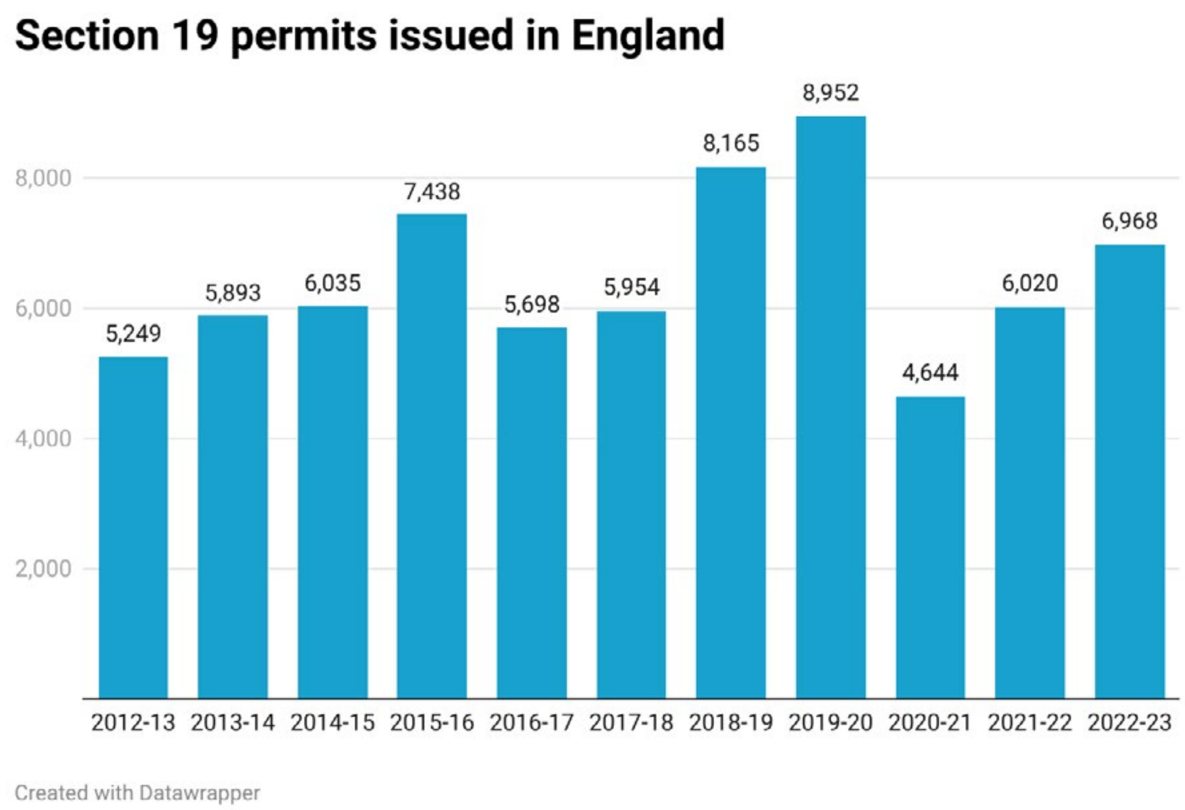
Rural CTOs generally have a lower income than urban ones. 32% of rural CTOs have an income of £25,000 or lower per year, compared to just 15% of urban organisations. Similarly 38% of urban CTOs have an income of more than half a million per year, compared to just 13% of rural CTOs.

1.3 Section 19 Permits

Community Transport requires a section 19 or 22 permit to operate in most cases. In England, over 34,000 section 19 permits were issued between 2018 and 2023, by the Office of Traffic Commissioner (OTC), designated bodies and some Local Authorities. A permit is valid for five years from its issue date. The CTA is largest designated body and had over 5000 active permits in England in August 2024.

Fig 1.6: Number of section 19 permits issued in England 2012-23



Source: OTC Annual Report 2023

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The types of organisations applying for section 19 permits varies, particularly according to the issuing body. For example, most section 19 permits issued by the OTC are to schools and educational bodies and 'secondary' providers, generally charities or community groups who are providing transport to support their main activity or purpose.

Local authorities generally issue permits internally to enable transport for Adult Social Care, Children and Young People services and other activities.

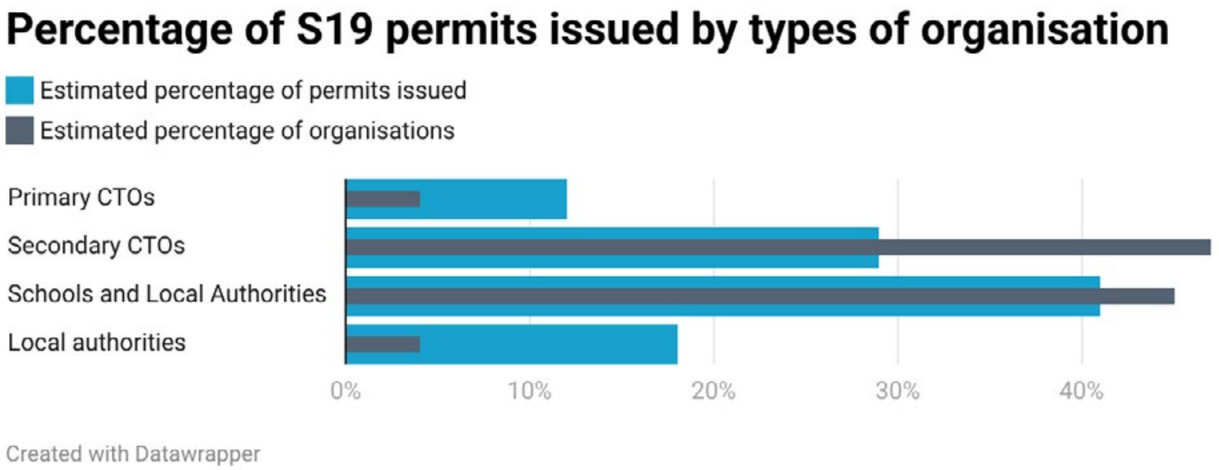
Additionally, section 19 permits may be issued by designated bodies. CTA is the largest of 68 designated bodies able to issue permit to members, along with organisations such as the Scouts association.[2] Organisations must join the CTA to be issued with a permit by the CTA, which means that the membership is weighted towards primary purpose CTOs, who

2 The Section 19 Minibus (Designated Bodies) Order 1987

require multiple permits as well as the membership services that the CTA provides.[3] CTA is also the only body currently issuing permits for small vehicles and is discussing revised guidance with the OTC to clarify this practice.

The CTA membership makes up a relatively small percentage of organisations applying for permits. In the 2018 to 2023 period over 12,000 different organisations received section 19 permits in England. An estimated 85-90% of those organisations are either educational bodies or secondary providers. Figure 1.6 shows estimated percentage of permits issued by types of organisations based on a Freedom of Information request to the Office of Traffic Commissioners (OTC). The OTC note that this is based on incomplete returns from some local authorities. Equally, the categorisation of organisations applying for permits is based on qualitative analysis of the records, based on prior knowledge and organisation's internet presence. Consequently, these figures should be regarded as indicative.

Fig 1.7: Section 19 permits issued in England by type of organisation 2018-2023



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Whilst primary Community Transport operators constitute less than 5% of the organisations receiving section 19 permits, the percentage of all permits issued to this type of group is much higher.

Section 19 permits are required by the operator, who is not necessarily the owner of the minibus, but could be a group hiring the minibus from its owner. Consequently, permits may be issued to groups who do not own vehicles and therefore the number of permits issued is likely to be considerably higher than the number of minibuses. This is reflected in the large number of secondary organisations receiving a relatively small number of permits.

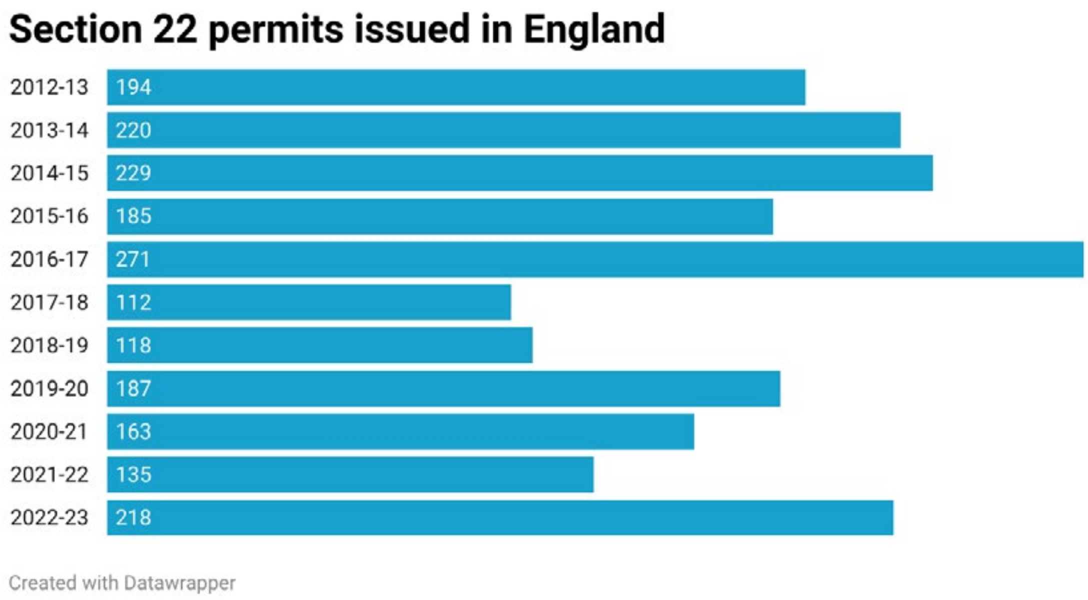
This practice highlights the wide range of organisations that could be part of the Community Transport sector, including those that are not transport operators, or even vehicle owners. It also showcases the additional capacity that the Community Transport sector brings to the voluntary and community sector, sharing vehicles, staff, volunteers and resources amongst local groups.

3 Permit-only memberships are now available from the CTA for secondary providers or schools who do not require the full package of membership services.

1.4 Section 22 permits

Section 22 permits are only issued by the Office of the Traffic Commissioner (OTC) and are mainly for use on scheduled community bus routes.

Fig 1.8: Section 22 permits issued in England 2012-23



Source: OTC Annual Report 2023

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Previous CTA state of the sector research documented the growth in the number of section 22 permits issued by the OTC following the revision of permit conditions in the Local Transport Act 2008, which imposed a lifespan of 5 years on each permit. This Act removed the upper limit of 16 passengers and allowed paid drivers, whereas drivers had to be volunteers previously.[4] As shown in figure 1.7, the number of permits has fluctuated over the past ten years, but given that prior to 2008 the number of section 22 permits did not exceed 50 in any one year, the overall result of the legislation was to increase the number of section 22 permits considerably.

Community bus routes must be registered with the OTC. In 2022 a freedom of information request showed over 800 routes in England. Just over 100 of these were registered to local authorities, chiefly county councils. Previous CTA research noted that there were 220 registered community bus routes in 2012, so there has been a large growth in this type of provision[5].

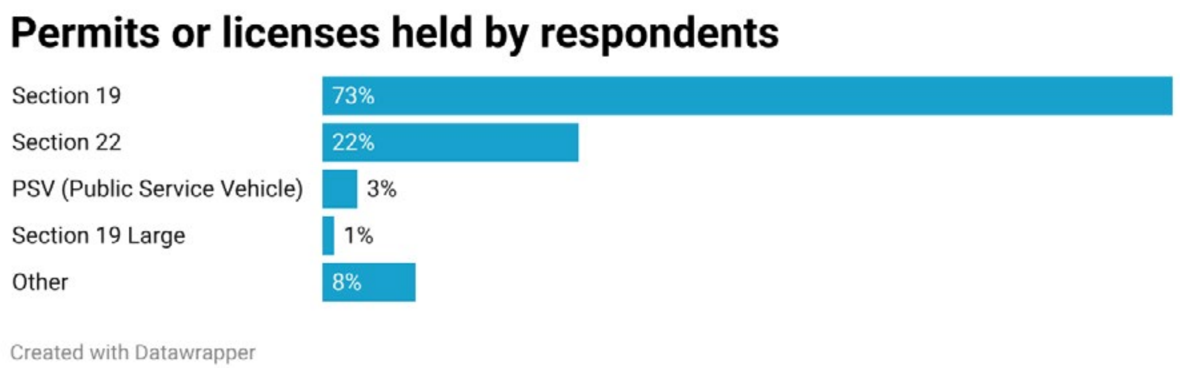
4 Local Transport Act 2008, Section 59
5 CTA (2012) State of the Sector report

In 2024, the OTC started to issue the number of live permits they have issued at regular intervals.[6] The most recent figures issued (June 19th 2024) showed 821 live section 22 permits. 29% were issued to local authorities or town councils, suggesting that permits may be being used to supplement bus services, particularly as local services are discontinued.[7] Further investigation is required to understand this change and the implications for CTOs.

1.5 Respondent permits

The Mapping England response showed three quarters of CTOs held section 19 permits. Just over a fifth held section 22 permits, showing the high use of these types of permits amongst primary CTOs. A small number of organisations were using PSV 'O' licenses.

Fig 1.9: Types of permits or license per respondent organisation (base=249)



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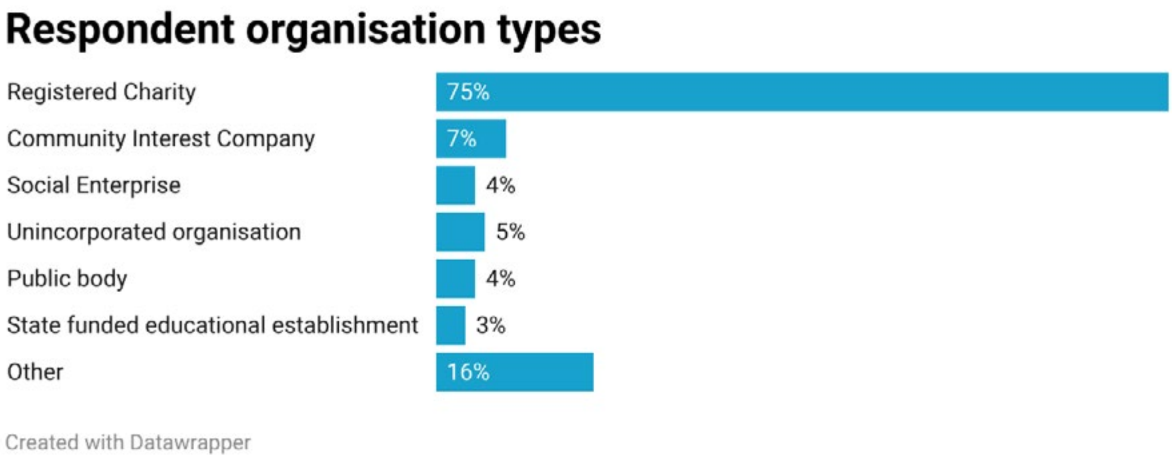
6 https://www.gov.uk/government/publications/section-19-section-19-large-and-section-22-permits-issued-under-the-transport-act-1985
7 For example, see Leeds University research on bus service reductions https://policy.friendsoftheearth.uk/insight/how-britains-bus-services-have-drastically-declined

1.6 Organisation types

Three quarters of respondents were registered charities, with just over 1 in 10 registered as either a community interest company or social enterprise. Several organisations noted that they were also company limited by guarantee (without share capital) under 'other': these organisations were also registered charities. Other structures listed included registered societies (either industrial and provident, or community and benefit societies) and charitable incorporated organisations. This suggests a continuing need for support with charitable administration, particularly for smaller organisations, but also shows a need for support with a diverse range of organisational structures.

School and public bodies were removed from analysis.

Fig 1.10: Organisational structure per respondent (base=278)



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2. Income

A steady and reliable source of income is vital for Community Transport operators, allowing for long term planning, investment in vehicles and retention of staff. Concerns over income and funding were cited as one of three main priorities for 2024 by three fifths of respondents.

This section looks in more detail at the sources of this income and the potential for CTOs to increase their revenue in the future.

Survey responses show that grant funding is critical and is in the top 3 sources of income for more than four-fifths of CTOs. However, this source of income is time consuming to apply for and frequently does not allow for long-term planning.

Despite a strong need for grant funding, CTOs had an average of four different sources of income. This diversity is a strength, with sources of income such as fundraising, donations and trusts providing a small but important source of money for many.

Grant income and savings are also central to financing the purchase of new vehicles, with most organisations again relying on more than one source of finance, due to the large investment required.

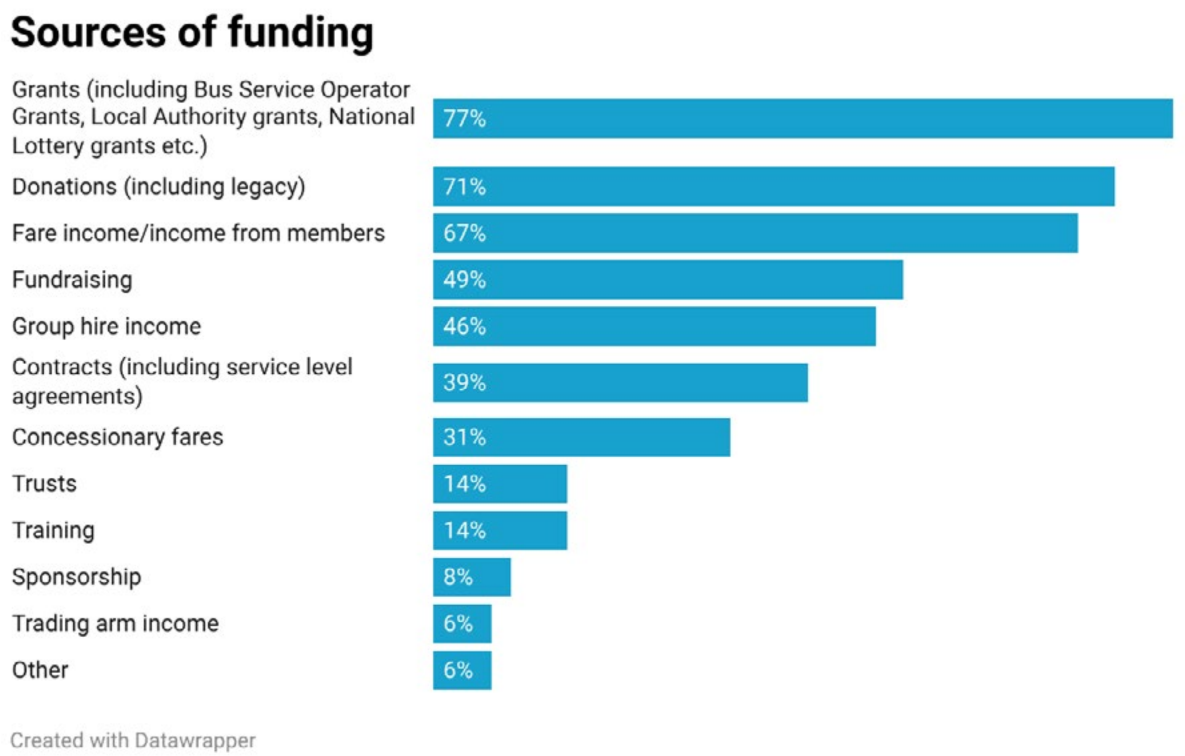
CTA will continue to press for more sustainable funding solutions as well as offering support in locating and completing grant applications.

Halton Community Transport

2.1 Sources of income and funding

Grant funding is vital to CTOs. As shown in fig 2.1, almost four fifths of CTO receive this type of income.

Fig 2.1: Sources of income for CTOs (base=192)



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Donations and fare or member income are also critical, although in the case of fare income, a third of organisations do not receive this. Predominantly the organisations not receiving fare income were operating contracts or receiving donations.

It is also notable that CTOs do not rely solely on one source of income. On average, CTOs had four different sources, rising to 5 different income sources for primary purpose organisations and falling to 3 sources for secondary purpose organisations.

The average number of funding sources rises incrementally from 3 amongst the very smallest organisations with an income of £25,000 or less per year, to 6 amongst those with an annual income of £250,000 to half a million. The number of funding sources for those organisations with an annual income of over half a million declines slightly, indicating that larger organisations may have fewer funding sources for larger amounts of money.

2.2 Largest sources of income

Whilst CTOs are likely to receive several different sources of income, some of these are larger than others. As shown in figure 2.2, grant income is particularly important. For 39% of CTOs receiving grants, this is their largest source of income and for 81% of grant recipients it is in the three largest sources of income.

Figure 2.2: Largest three sources of income for CTOs (bases in brackets)

Source of income (number of respondents receiving this income in brackets)	**Largest source of income**	**Second largest source of income**	**Third largest source of income**	**Not in top three**
Grants (including Bus Service Operator Grants, Local Authority grants, National Lottery grants etc.) (148)	39%	27%	15%	19%
Donations (including legacy) (137)	9%	12%	25%	53%
Fare income/income from members (128)	16%	34%	23%	27%
Fundraising (95)	4%	13%	18%	65%
Group hire income (88)	19%	19%	19%	42%
Contracts (including service level agreements) (75)	56%	24%	4%	16%
Concessionary fares (59)	20%	19%	17%	44%
Trusts (27)	15%	7%	30%	48%
Training (26)	0%	4%	12%	85%
Sponsorship (15)	7%	0%	13%	80%
Trading arm income (11)	9%	36%	18%	36%
Other (11)	64%	9%	9%	18%

39% of CTOs held contracts or service level agreements. These were likely to be the largest source of income of 56% of those with contracts, and in the top three sources of income for 84% of CTOs receiving this type of income. For organisations with contracts but without grants, contract income is even more important. Four fifths of the small group of CTOs with contracts but not grants, stated that their contracts were their largest source of income. This shows how important service contracts can be for CTOs, but also that contract income can become dominant for those who have it.

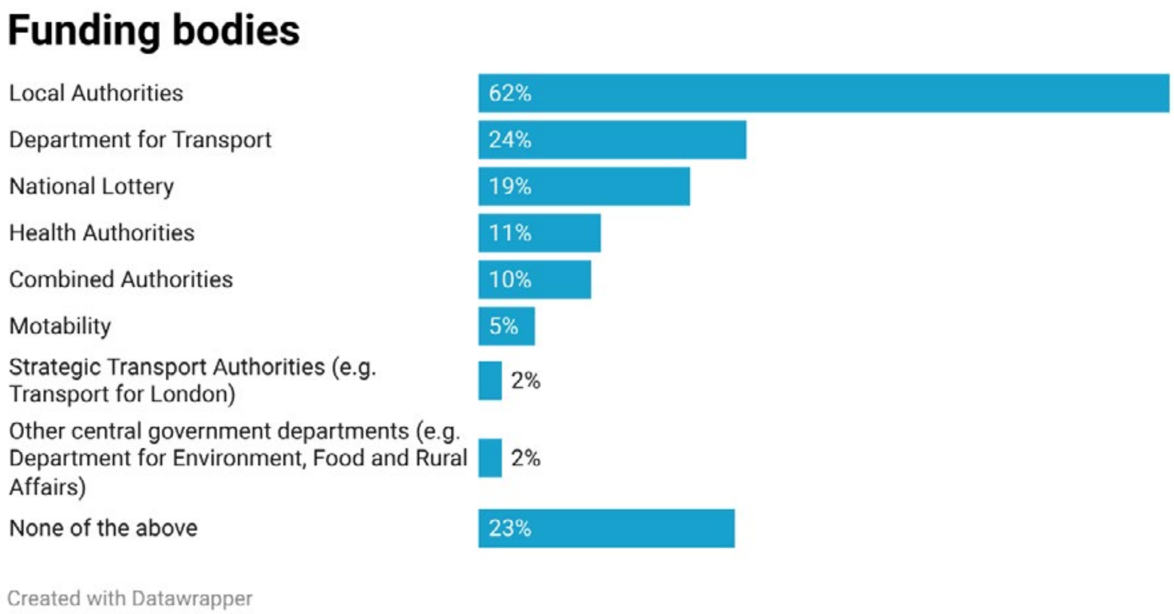
In contrast, whilst donations are a popular source of income, these are not amongst the three largest sources of money for half of CTOs. Likewise, whilst fundraising is a popular source of income, it is also unlikely to be in the top three largest sources of income for most groups.

Trading arm income, despite not being a popular type of income, is an importance source for those CTOs who use it.

2.3 Funders

Respondents to the survey were also asked whether they received funding from a range of bodies as shown in figure 2.3.

Figure 2.3: Percentage of CTOs receiving funding by body (base=192)



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Local Authorities are the central funders for Community Transport organisations, which places organisations in a vulnerable position, given the high reliance shown to grant and contract funding in figure 2.2. Local Authorities have seen a series of funding cuts and face increasing demand for services, to the extent that half of authorities replying to the Local Government Association (LGA) 2023 temperature check were not confident of being able to meet statutory duties in 2024/25.[8] Analysis of the National Council of Voluntary Organisations' (NCVO) almanac has found that Local Authority funding of the Voluntary and Community sector had already fallen by 23% between 2009-10 and 2020-21.[9] In this climate, discretionary funding, which includes local grants to CTOs, is under severe pressure.

Other areas show the potential for growth. Journeys for health purpose are made by two-thirds of CTOs, but only a tenth of CTO's receive funding from health authorities.[10] Some do receive local authority funding for journeys to health destinations, but in discussion organisations note that it is difficult to engage health authorities to discuss transport arrangements. The CTA manifesto highlights the need for a clear point of contact for transport within health authorities, to allow these journeys to be coordinated and funded.[11]

8 LGA (2023) *Post-Autumn Statement Temperature Check.*
9 Kitson, B (2024) *Tethered fortunes: The threat to charities from trouble in local government*, Pro bono Economics.
10 See Section 7, figure 7.3 and Section 4, figure 4.6.
11 CTA Manifesto

Strategic Transport Authorities account for a very small amount of local funding, but there is potential for greater local involvement through devolved transport decision making and investment in the sector through the inclusion of Community Transport in strategic documents such as Local Transport Plans and Bus Service Improvement Plans (BSIP).

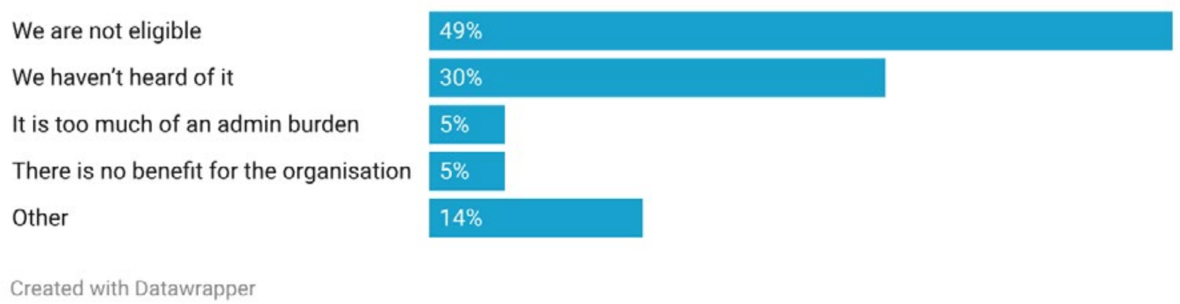
2.4 Bus Service Operator's Grant (BSOG)

The Bus Service Operators Grant (BSOG) is a discretionary grant paid to local bus service operators. The grant helps them recover some of their fuel costs.

BSOG can be an important source of funding for CTOs and 54% of respondents were claiming it.[12] It provides support towards fuel costs and since the announcement of an uplift in July 2023, for every £1 claimed, operators will now receive £1.60.[13] Moreover, organisations in receipt of this grant receive a BSOG number, which facilitates easier access to other DfT schemes.

Organisations not in receipt of BSOG were generally not eligible for the scheme, as shown in figure 2.4. 39 of the organisations were not eligible due to the services they were providing, but 24 had not heard of the scheme, suggesting a small number of CTOs who could potentially apply for the scheme in the future.

Figure 2.4: Reasons for not receiving BSOG (n=79)



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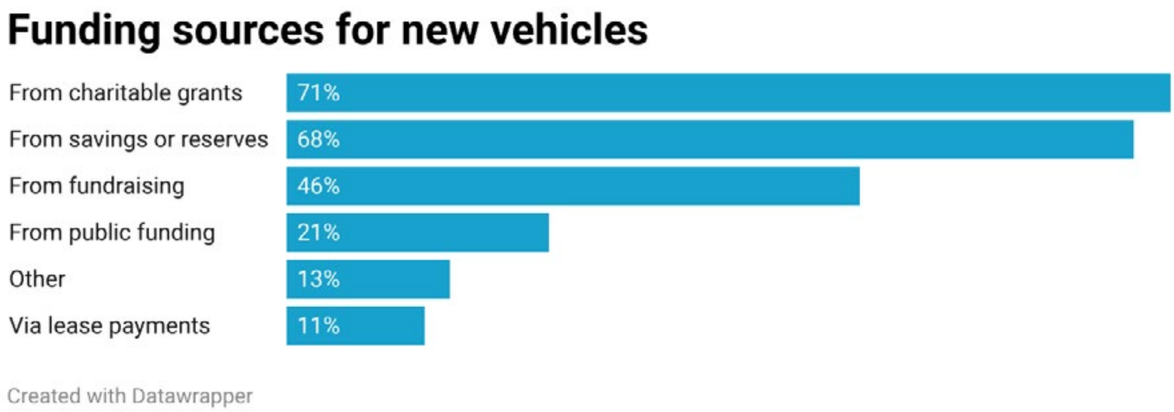
12 This suggests that the percentage receiving funding from the Department for Transport (DfT) in Figure 2.3 is understated, as whilst half of respondents were receiving BSOG funding, only a quarter of respondents said they were receiving funding from DfT. Potentially respondents were unaware of the connections between the two sources or did not associate BSOG with the DfT when completing the questionnaire.
13 https://ctauk.org/bsog-funding-to-support-ct-provision/

2.5 Purchasing new vehicles

The major capital expenditure for any Community Transport operator is a new vehicle. Section 6 looks at the existing fleet and last vehicle purchases, but figure 2.5 shows how CTOs generally pay for new vehicles.

Figure 2.5: Finance for new vehicle purchases (N=160)



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Most organisations were using more than one funding source to cover the cost of new vehicle purchases, indicating that financing a new purchase is likely to be a long-term project.

Generally, the percentage of organisations using each source of funding remains broadly consistent whatever the overall income of the group, apart from lease payments, which are more popular amongst CTOs with the largest incomes. This suggests that there may be potential to extend leasing opportunities to a greater number of organisations.

3. Staff and volunteers

Community Transport wouldn't exist without the dedicated teams of volunteers and paid staff who perform a range of roles, from supporting the back office to assisting passengers and, of course, driving.

Across the response to the survey, two thirds of CTOs had paid staff and there were two volunteers for every one paid role. Organisations with smaller incomes were more reliant on volunteers.

Finding qualified drivers, particularly volunteers is crucial for CTOs and the research revealed several worrying trends. Two thirds of volunteer drivers with a D1 entitlement held this category of license through 'grandfather rights' by virtue of qualifying prior to 1997. This shows the reliance that the sector has on an older group of volunteers, and the importance of reforming driver licensing to enable a new generation of D1 drivers. CTA is committed to continued lobbying for this change.

Furthermore, in common with other VCSE areas, survey results revealed a combination of reduced volunteer recruitment and increased demand for services. This led many respondents to worry about their capacity to meet demand and reinforces the need to encourage measures that will bring more volunteers into the sector. The CTA will continue to provide support to volunteer recruitment, through advice, shared good practice and peer support.

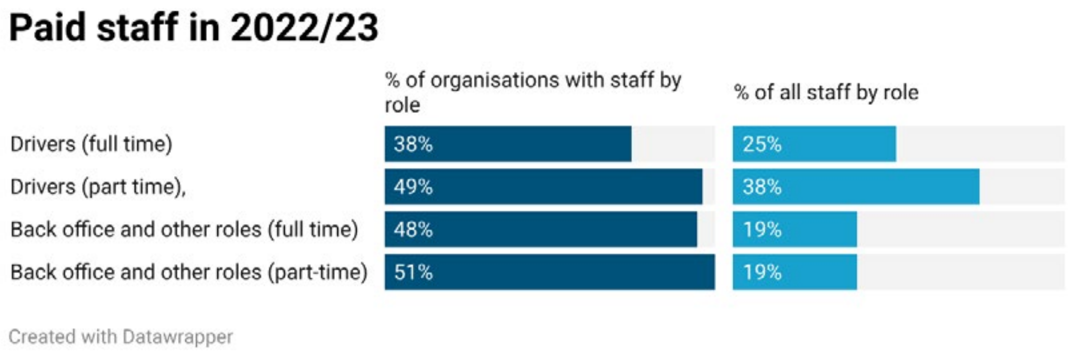
3.1 Paid staff

65% of respondents had at least one paid member of staff. Notably, 92% of organisations with contracts or service level agreements had paid staff. In discussion, several groups have indicated that it is not feasible to run a contracted service purely with volunteers, unless the organisation has an extremely large pool of volunteers.

Similarly, employment of staff did differ by organisational income. Only 17% of smaller CTOs with an income under 25K employed paid staff in any capacity, whilst all organisations with an income of over £250k had paid staff. Primary organisations were also less likely than secondary organisations to have paid staff, chiefly because they were more likely to have a smaller organisational income.

Figure 3.1 demonstrates the breakdown of paid staff by role and shows most paid staff were in driving roles. On average for each organisation with paid staff, there were 6 paid drivers and 4 back office, with a mix of full time and part time positions.

Figure 3.1: Staff in 2022/23



https://datawrapper.dwcdn.net/IVOap/2/

A high percentage of all full-time roles were paid. 77% of full-time drivers and 87% of full time workers in back office roles were paid staff. Full time volunteering is a rarity and those positions that require full time drivers or office staff, generally require a salary.

3.2 Volunteers

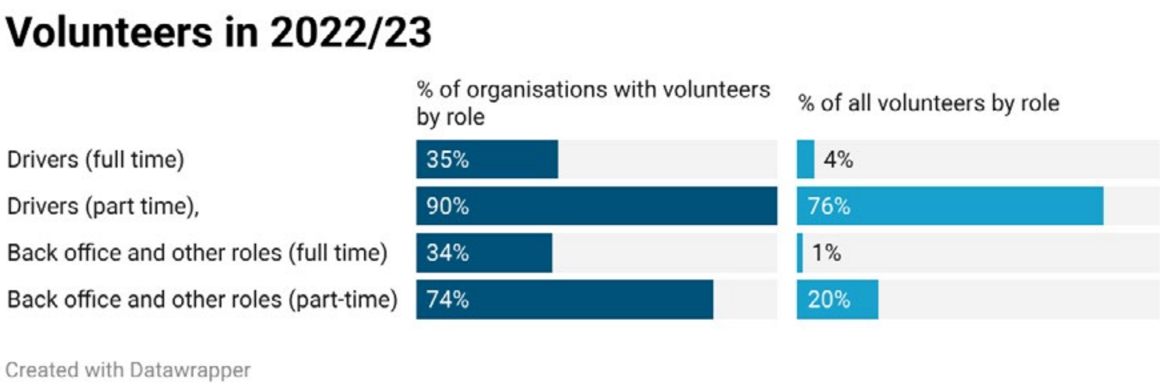
191 respondent organisations had over 4279 volunteers in all positions during 2022/23, an average of 22 volunteers per respondent organisation and approximately 15,800 if factored up to the entire England primary and secondary membership.

Across the whole response, there were two volunteers for every one paid position. Organisations with lower incomes were more dependent on volunteers. 96% of roles were filled by volunteers in organisations with an annual income of less than £100k, whilst only 29% were volunteers in organisations with an annual income of over £1million.

Figure 3.2 shows that nearly all organisations had part time volunteer drivers and three quarters had part time volunteers in back-office functions. Fewer organisations had full time volunteers: full time volunteers made up 5% of the overall total of full time roles.

Also apparent from figure 3.2 is that three-quarters of ***all*** volunteers were part time drivers. This shows the importance of licensing and training to enable volunteering in the Community Transport sector.

Figure 3.2: Volunteers in 2022/23



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The survey did not ask about the demographic details of volunteers, but comments noted that an aging pool of volunteers was a challenge for many organisations. This reflects a more general trend, identified in the Community Life survey and other studies, whereby recruiting volunteers and particularly younger volunteers, is a challenge.[14] The fact that most volunteers for Community Transport organisations are drivers with specific needs regarding driving licences and training, adds a further barrier to volunteer recruitment.

3.3 Licenses held

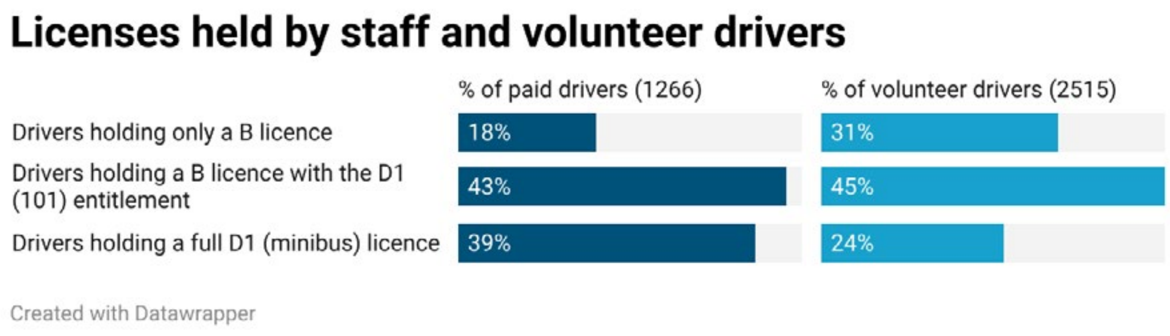
Most Community Transport organisations require paid and volunteer drivers to be able to drive minibuses. For a volunteer to drive a minibus over 3.5 tonnes or 4.25 tonnes if accessible, a D1 entitlement is required on the drivers' license. D1 was issued on all category B driving licenses prior to 1st January.

As shown in figure 3.3, 45% of all volunteer drivers hold the D1 'grandfather' 101 entitlement, that equates to 65% of all volunteer drivers with D1. However, because this category of license was last issued in 1996, the youngest holders of this entitlement are in their forties. Moreover, because drivers lose their D1 (101) entitlement when they reach the age of 70 and must reapply for their license, the available pool of drivers with this type of license will shrink by a fifth in the next five years and continue to reduce after that. This presents a considerable threat to Community Transport organisations, particularly smaller organisations who are heavily reliant on volunteers.

The alternative to a D1 (101) license is a full D1 license, requiring a separate test and a considerable investment for a CTO. A higher percentage of paid drivers hold the full D1 entitlement than volunteer drivers, reflecting the level of investment required and that paid drivers are more likely to be full time employees.

14 Department for Culture Media and Sport (2023) ***Community Life Survey 2021/22 : Volunteering and charitable giving***

Figure 3.3: Licence types of paid and volunteer drivers



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3.4 Volunteer recruitment

Volunteer recruitment had declined in 2022/23 amongst 37% of respondents. This pattern was broadly similar amongst rural and urban groups and CTOs with different levels of income. 19% of groups had experienced a growth in volunteer recruitment in the past year.

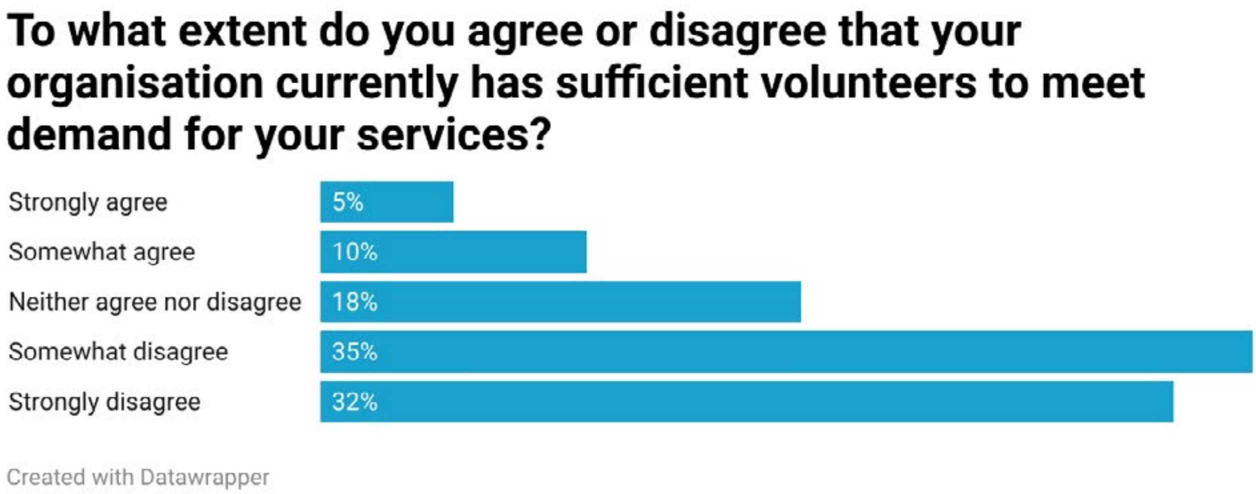
Declining levels of volunteering have been discussed by the National Council for Voluntary Organisations' ***Time Well Spent*** (2023) study, which noted a drop in volunteering levels from the COVID-19 pandemic, which had continued through 2021/22. Reasons attributed this trend included worries over the cost, particularly given rising living expenses, and a lack of available time.

CTA have highlighted the need for funding to support a fair deal for volunteers and remove some of the barriers to recruitment. Examples include reviewing the Approved Mileage Allowance Payment (AMAP) to ensure that volunteers are not out of pocket and organisations are funded to reimburse them, as well as granting D1 entitlement to category B licence holders to increase the available pool of potential volunteer drivers, especially amongst younger people.

3.5 Volunteering and demand

The impact of declining volunteer recruitment, together with rising levels of demand for Community Transport services (see section 5), can be clearly seen in figure 3.4. More than two-thirds of respondents did not think they had enough volunteers to meet demand for their services.

Figure 3.4: Levels of volunteering to meet demand (n=182)



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This level of disagreement was consistent through different levels of organisational income, rural and urban focus. Secondary groups were also as likely to disagree as primary purpose groups, indicating that the dearth of volunteers was not just affecting groups with a sole transport purpose.

4. Services

Community Transport services emerge to fill a gap in existing transport provision. Whether it is because there are potential passengers with needs that cannot be served by existing transport, or because of gaps in the transport network that leave passengers without a public transport alternative, Community Transport services are designed to meet the needs of a specific set of passengers.

Because CTOs are responding to specific transport needs, there are many different types of services in operation, often within the same organisation. CTOs are innovative and adaptive and provide increased levels of support for passengers to allow them to access services and activities. For example, whilst the research shows that Group Hire, Volunteer Car Schemes and Dial-a-ride are the most popular types of service, it also reveals that service types vary according to whether the area served is rural or urban, the organisation is primary or secondary purpose.

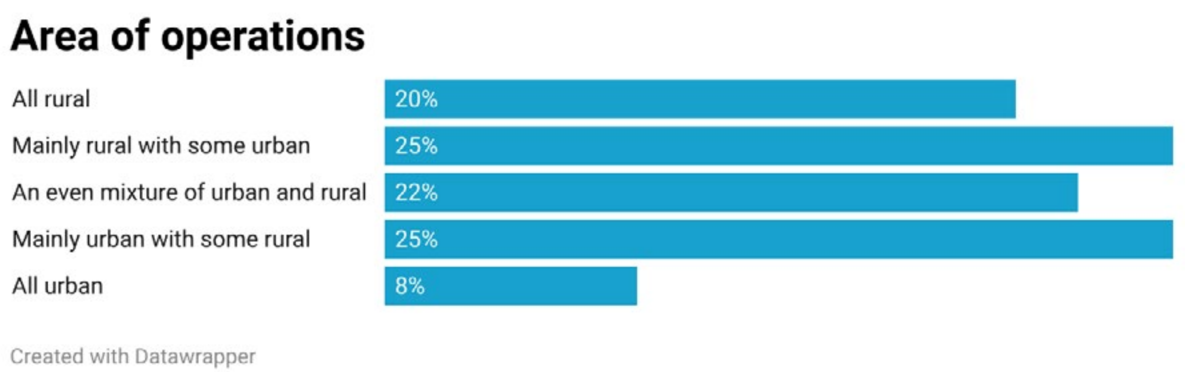
CTOs are providing services for a wide range of passengers showcasing the accessibility of services and the different destinations and purposes that Community Transport exists to serve. Social trips, shopping and health were top journey purposes, but groups offered services for many other reasons besides these.

Four fifths of organisations had seen an increase in demand for services in the past year, potentially due to reduced public transport, an ageing population, or increased diversity of Community Transport provision. However, this reinforces the need for sustainable funding and increased recruitment, to provide the resources needed to meet this demand.

4.1 Rural/Urban mix

Whilst many CTOs will be based in more urban areas according to available premises, the Mapping England asked about the area of operation. As shown in figure 4.1, the response to the Mapping England was slightly weighted towards CTOs operating in rural or mainly rural areas. Nevertheless, a third of respondents were operating in urban or predominantly urban areas.

Fig 4.1: Area of operation (base=258)



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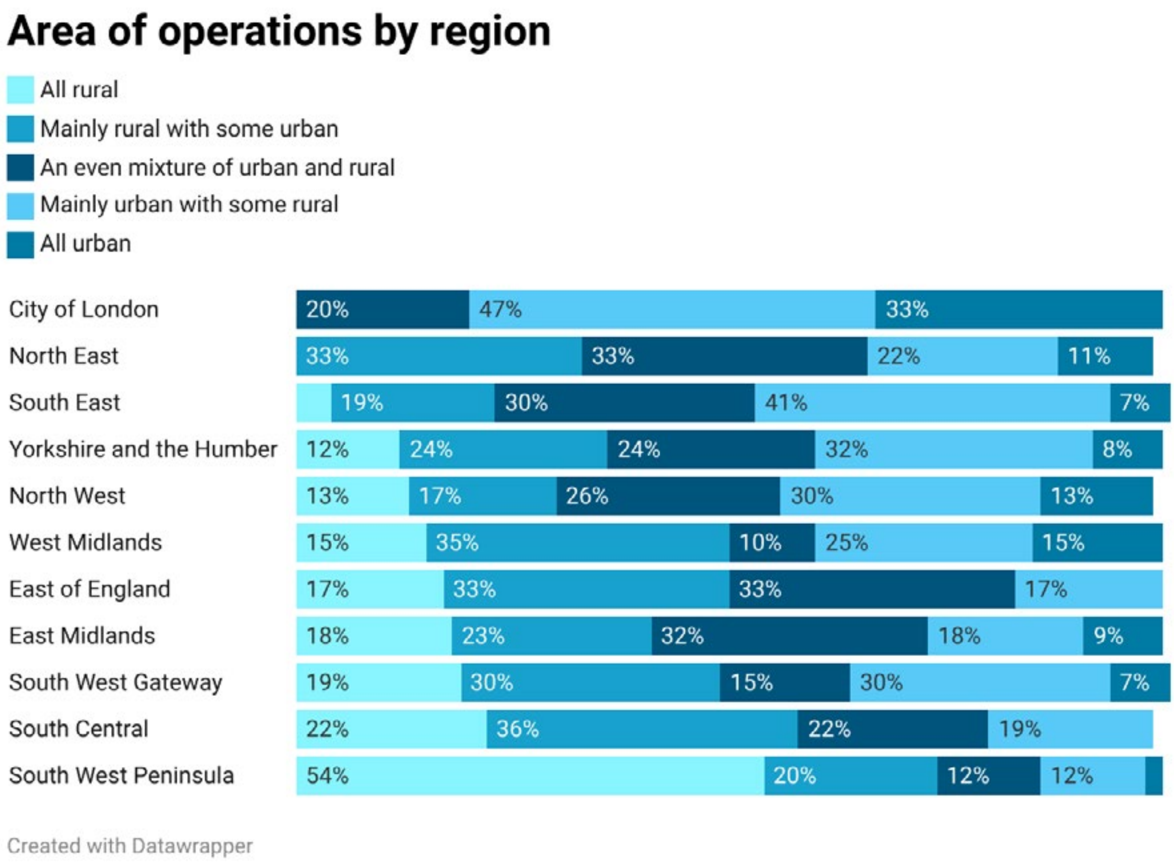
The response across England showed a difference in the rural and urban mix of services according to the CTA region of the respondent. Unsurprisingly, London respondents are nearly all focused in urban areas, whilst the South West Peninsula has the highest concentration of purely rural services.

Fig 4.2 Rural/urban service mix by region (base=257)



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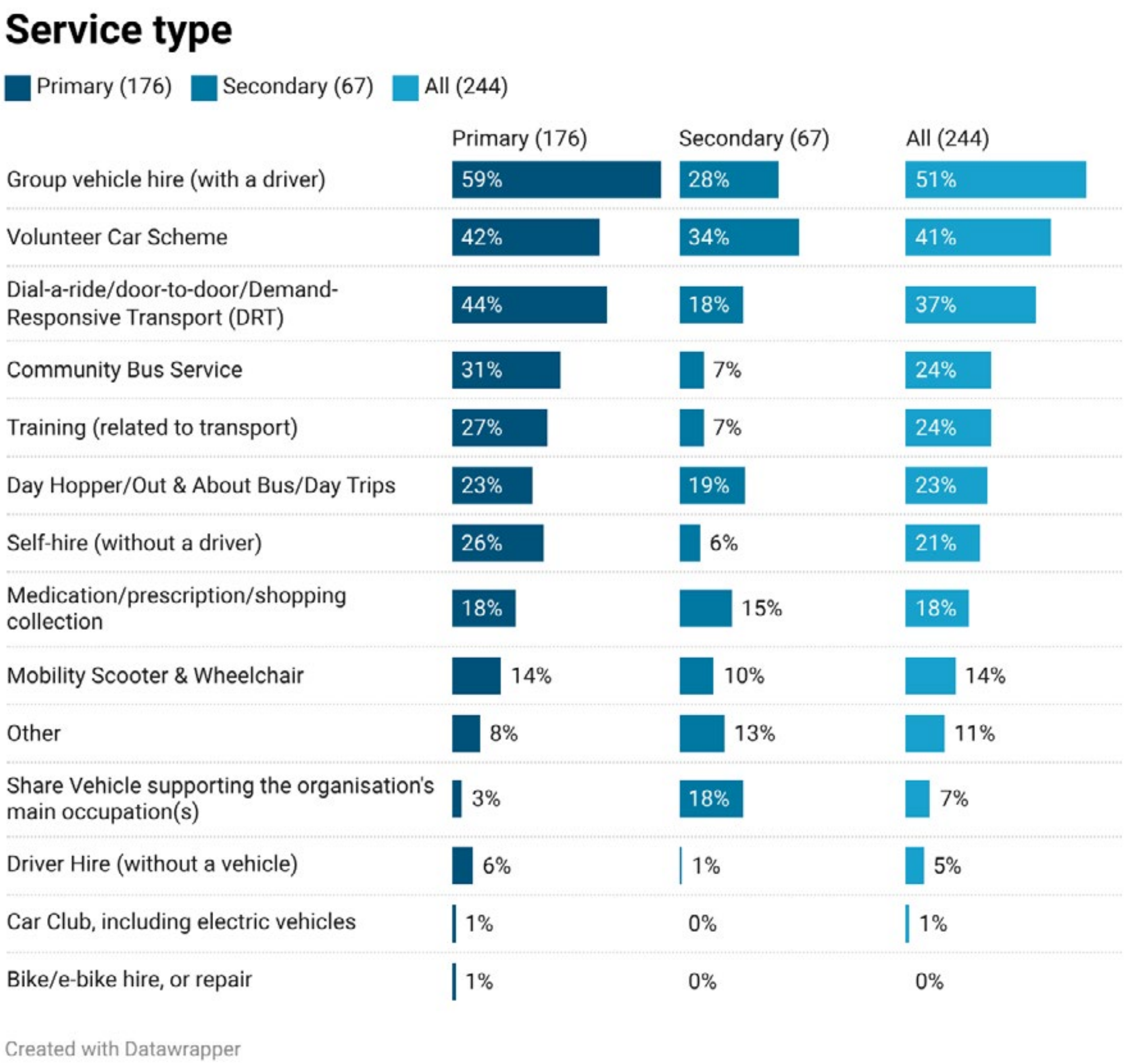
Respondents were also asked whether they were providing services in coastal areas or islands. 24% were providing services in coastal areas and 2% operated services on islands.

4.2 Service type

Group hire (providing a minibus service for local community groups) was the most popular type of service delivered amongst respondents. The popularity of group hire showcases the value that Community Transport brings to the wider voluntary and community sector, adding expertise and transport capacity to VCSE organisations in their area.

Volunteer car schemes, which provide supported access to a variety of destinations, and Dial-a-ride minibus services, which provide a door to door minibus service for passengers unable to access public transport, were the second and third most popular service type.

Figure 4.3: Percentage of primary and secondary purpose CTOs offering different types of services (bases in brackets)



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As shown in figure 4.3. there was a difference in the types of service delivered by primary and secondary operators. Generally secondary purpose operators were delivering fewer different types of service, as an average primary CTOs were delivering 3 different types of service each, whilst secondary purpose operators were delivering 1.7 different types of service per group. Potentially this reflects that primary purpose operators are likely to expand the type of service to meet the needs of a diverse passenger base, whilst secondary purpose operators may have more specialised needs amongst their passengers.

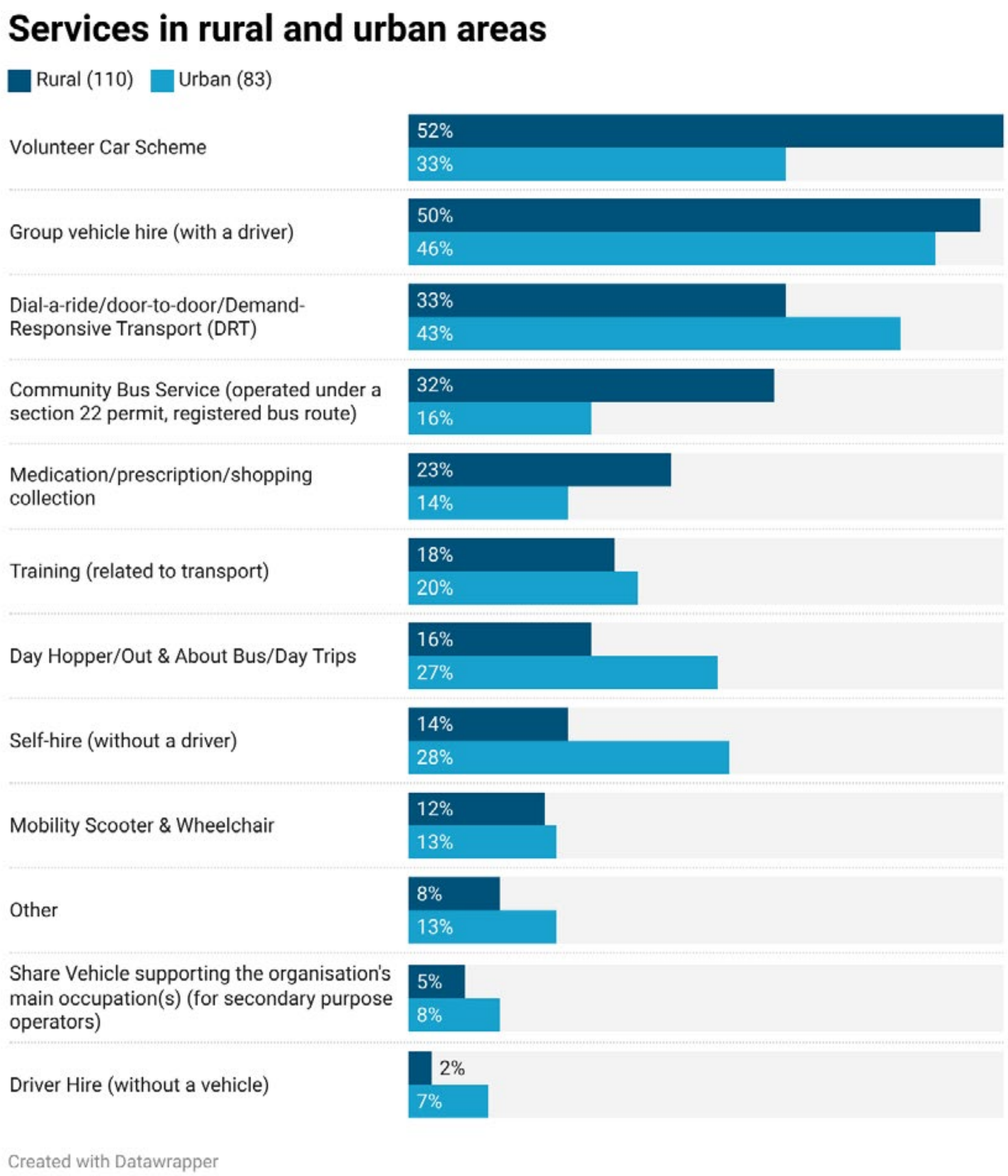
Whilst it is difficult to directly compare these results to the previous state of the sector research in England, one notable difference is that whilst the percentage of CTOs offering group hire, car schemes and community bus routes has remained broadly consistent, the percentage of CTOs offering dial-a-ride schemes has reduced dramatically, from 61% in 2014, to 37% in 2024. Whether this difference is due to changes in definition in the respective surveys, or a wider change in service offerings, deserves further investigation.

Derbyshire Community Transport

4.3 Services in rural and urban areas

Responses revealed that some types of service were more popular in rural areas and vice versa as shown in figure 4.4. Community bus schemes were more popular in rural areas than urban ones, reflecting that this type of provision is often filling gaps in the transport network caused by a lack of rural buses. Volunteer car schemes were also more prevalent in rural areas than urban ones, although a third of respondents in urban areas also operated this type of scheme. Conversely, CTOs operating in urban areas were more likely to be operating self-drive without a driver.

Figure 4.4: Services in rural and urban areas (bases in brackets)



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4.4 Volunteer Car Schemes

The response to the survey showed 41% of organisations operated volunteer car schemes. However, only 15% of organisations were ***solely*** volunteer car schemes and it is likely that both the survey response and the CTA membership in general underrepresents this type of organisation.

Volunteer Car Schemes in the survey sample are heavily concentrated in Devon. This is due to the engagement of the Access to Services team in Devon, who run a forum of scheme providers in the area and engaged their members during the survey period.

As a snapshot, Devon's Access to Services group works with 49 providers in the county. CTA's membership for the county is 38 groups, with 14 common organisations between the two cohorts. This suggests that there are 73 groups in the county including the voluntary car schemes, nearly double the CTA membership. However, it is likely that this level of provision is variable between areas and equally likely that the level of support by Access to Services has encouraged continued provision by volunteer car schemes in Devon.

Volunteer car schemes do not require permits (if using volunteer's own vehicles) and so are unlikely to engage the CTA for this purpose. Equally, most are small, volunteer-led organisations and so may not be aware of CTA, have time to engage, or feel that the support offered is tailored for their needs.

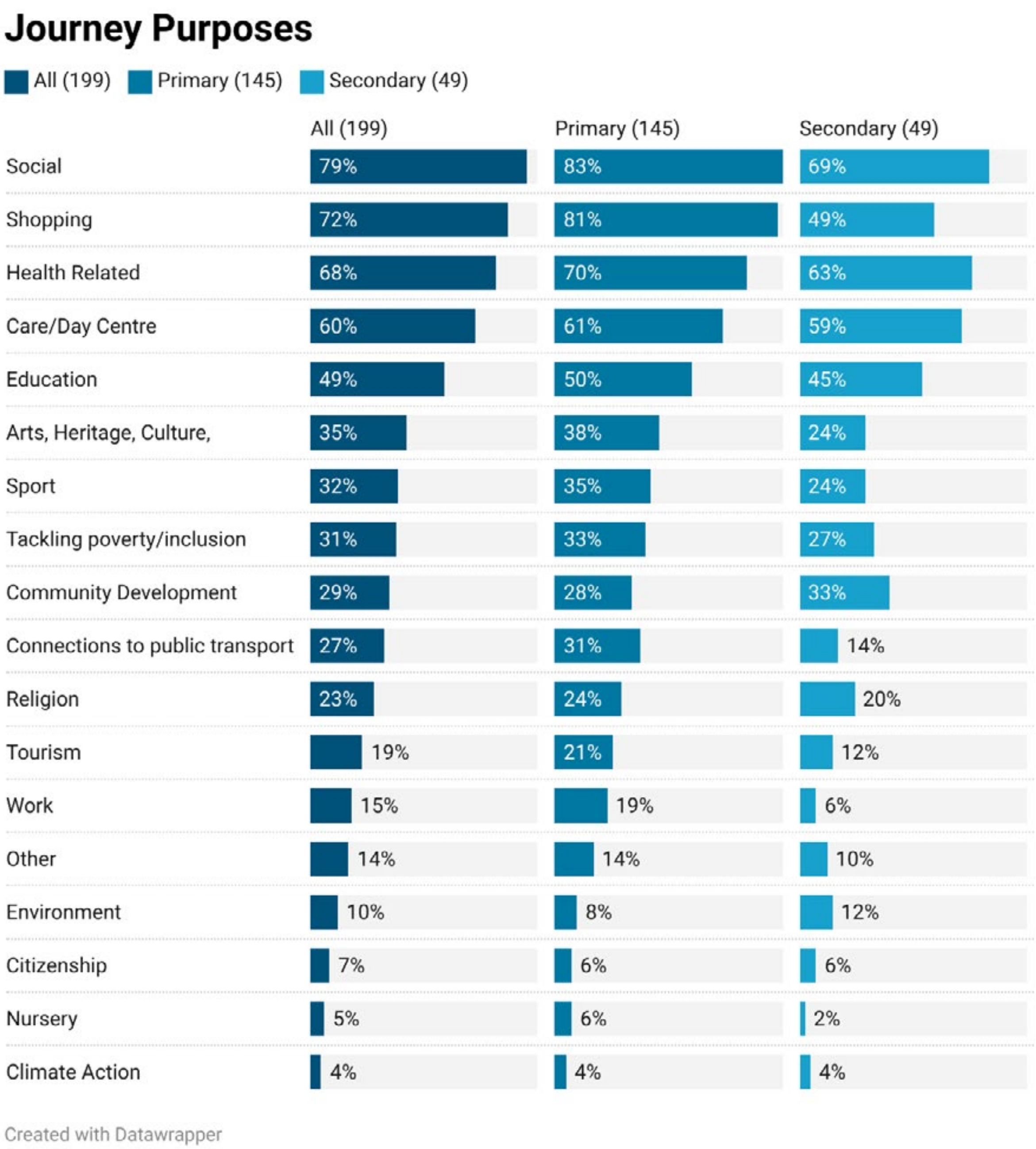
The numbers of volunteer car schemes and the specific issues faced by groups providing this type of service will be a subject for continued investigation.

SWAN Community Transport

4.5 Journey Purposes

The main purposes for Community Transport journeys were social, shopping and health-related trips. These types of trips were made by more than two thirds of respondents. However, CTOs were making journeys for many different purposes as shown in figure 4.6.

Figure 4.6: Journey purposes by type of organisation (bases in brackets)



https://datawrapper.dwcdn.net/vzaCG/2/

There were two areas where the types of journeys differed significantly between primary and secondary operators. Firstly, shopping trips were disproportionately provided by primary operators, which also reflects that primary operators were more likely to be providing dial a ride services. Primary operators were also more likely than secondary operators to be transporting passengers for connections to public transport.

CTOs operating in urban areas were more likely than those in rural areas to be transporting passengers to and from social care or day care, potentially reflecting the locations of these services. However, there were no other major differences between the journey purposes of CTOs in rural or urban areas.

4.6 Passengers

Community Transport provides access to destinations for those who would otherwise be unable to access them, either due to physical or transport barriers. CTO's design their services and select their vehicles to enable these groups to access their services.

Figure 4.7 shows the percentage of organisations transporting each passenger type. Nearly all CTOs were transporting older people, those not selecting this category were predominantly youth organisations or organisations providing transport for a specific cohort.

Primary purpose CTOs were more likely than secondary purpose organisations to be transporting older people, people in rural areas, children, third sector organisations, people with financial hardship, teenagers and the general public through community bus routes.

Figure 4.7: Passenger types by rural/urban focus (bases in brackets)

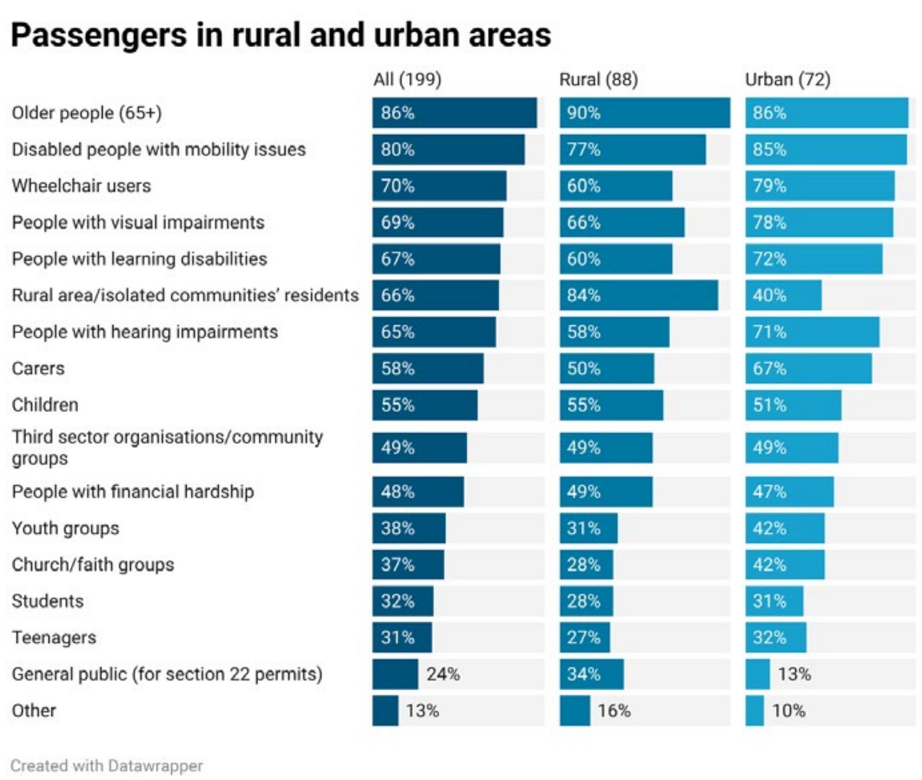


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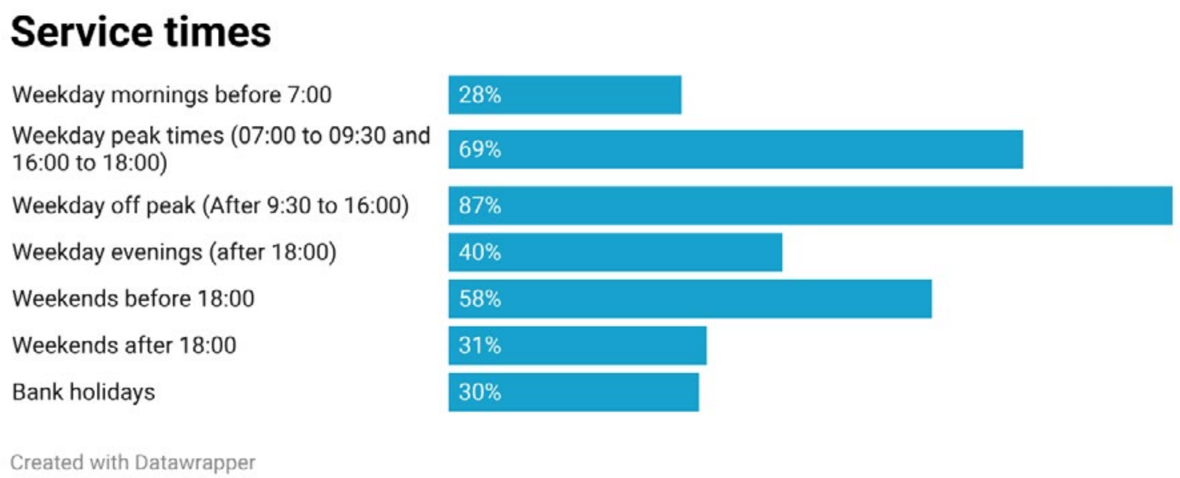
Figure 4.7 also shows the differences in passenger types carried by rural and urban focused organisations. Urban CTOs were more likely than rural providers to be transporting wheelchair users and carers. As previously noted, rural organisations were more likely to transport the general public via community bus routes, and of course were more likely to be reaching isolated rural residents.

4.7 Times of operation

CTOs provide services to meet the needs of their passengers, so times of operations are largely driven by purpose of the journey. Given that a large proportion of organisations are transporting older people and that social, health and shopping trips are most popular, it is unsurprising that weekday services, either peak or off peak, are most common.

However as shown in figure 4.8, several CTOs also provide services at weekends and on bank holidays as needed.

Figure 4.8: Times of operation (n=199)



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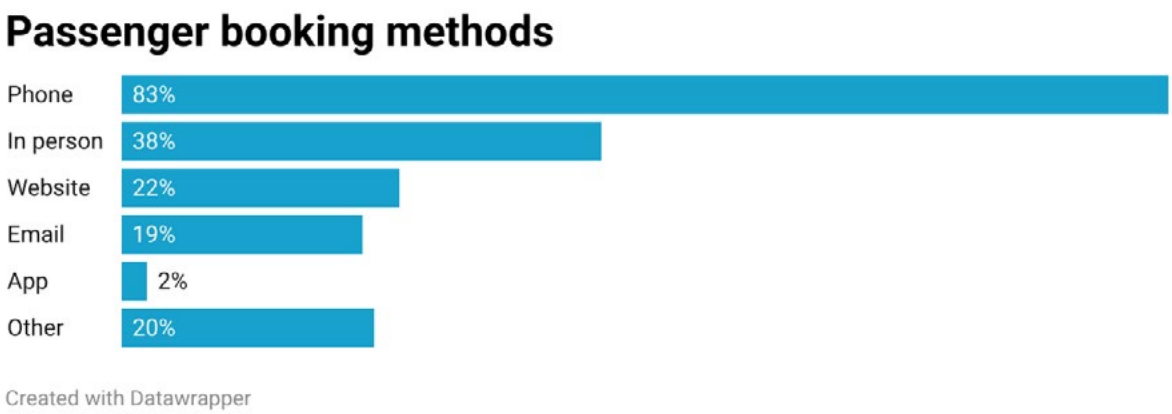
A common misconception of Community Transport amongst transport commissioners is that organisations are providing an infrequent or irregular service. However, 90% of respondents noted that their services are provided all year round, with 1 in 10 providing a mixture of year-round and seasonal services.

4.8 Passenger booking

Phone is the most common method of booking journeys. Relatively few organisations used digital methods, with only a fifth of organisations having a website for this purpose.

There were several other methods suggested including referrals from other agencies and several CTOs noted that they did not have a booking process but ran scheduled stops using a section 22 permit.

Figure 4.9: Methods of passenger bookings



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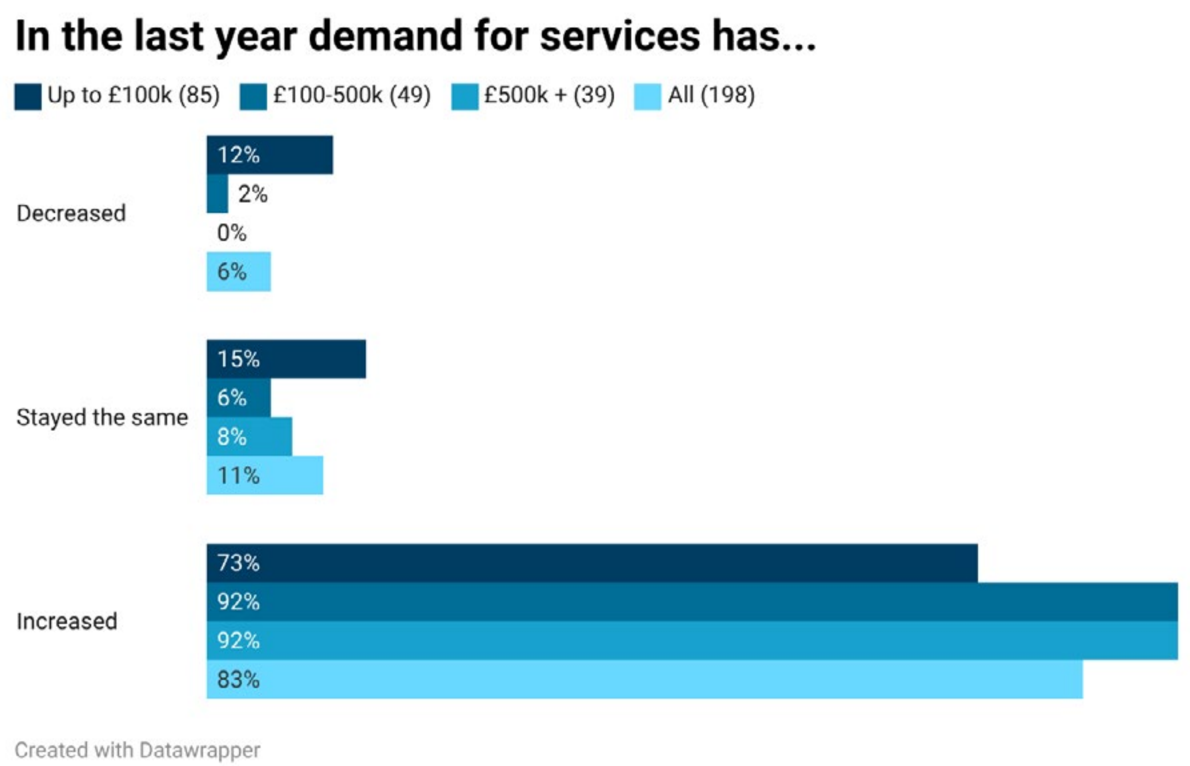
Nidderdale Community Transport

4.9 Demand for services

CTOs were asked to estimate whether demand for their services had changed in the last year. 83% of respondents felt that demand had increased, either a little or a lot.

As shown in figure 4.10, this figure differed by organisational income: CTOs with an income of below £100k were less likely to say that demand had increased and more likely to say it had decreased. However, even amongst these groups, demand had increased for three quarters of CTOs.

Figure 4.10: Demand for services by income (bases in brackets)



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5. Community Transport Trips

Just as CTOs provide many different types of services, so the number of number and character of trips are determined by the type and size of the organisation, the passengers being taken and the environment that the CTO is operating in. Respondents were asked to provide top-line figures for their monthly operations.

Crucially these figures show how CTOs are responding to different types of transport in different areas. Organisations operating in rural areas were likely to be making fewer trips, with fewer passengers, with a longer average trip distance due the more dispersed nature of their service area. The dispersed nature of demand is the chief difficulty for rural group travel and frequently the reason why commercial operators are not providing services in these areas.

Equally secondary purpose organisations are traveling less often and with longer distance trips, reflecting more day trips or transport for fewer passengers with distinct needs.

CTA will continue to work with CTOs to show the details behind these figures, for example supporting the valuable work by Ealing Community Transport in developing and updating their Social Value toolkit, as well as working with the sector to enable trip data to be collected and shared with local stakeholders more easily.

5.1 Estimating trips

The quantity of Community Transport trips is currently difficult to estimate for the sector. Organisations vary in size, offer different types of services which have differing capacity, and the definition of a trip often differs between organisations.

The Mapping England survey asked respondents to provide monthly numbers of trips, mileage covered and passengers taken. Not all organisations had full details available, so some organisations provided estimates. Given these barriers, it is difficult to formulate a reliable estimate of trip numbers, so these figures should be considered indicative. However, it is important to consider these indicative numbers of trips and passengers, as these provide an indication of the capacity of the sector.

5.2 Number of trips

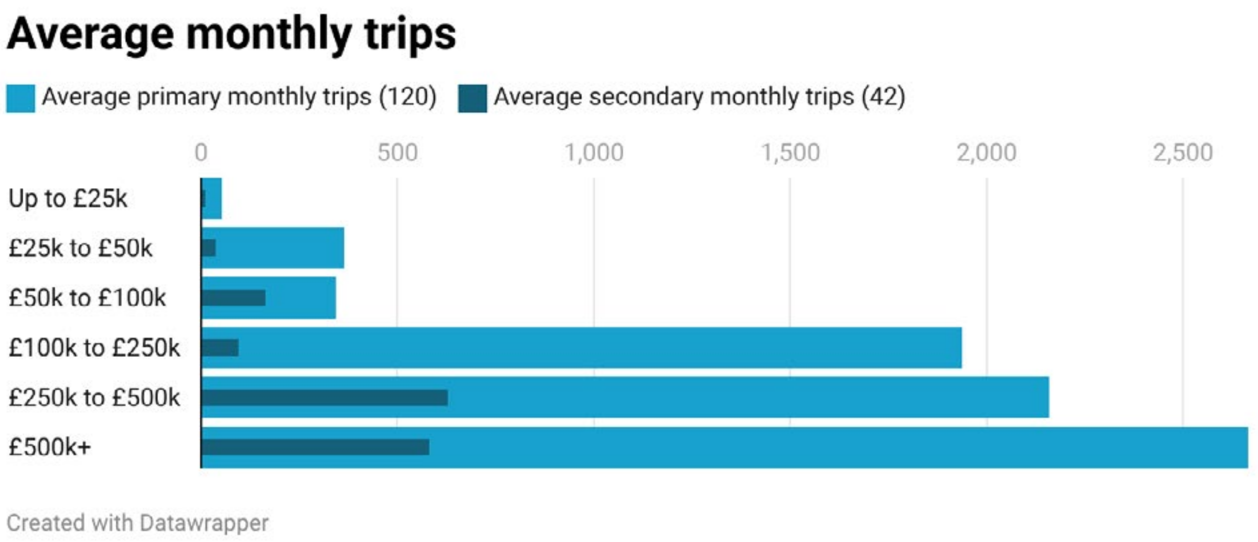
Organisations were asked to provide their monthly total of vehicle trips.[15]

On average, CTOs were making 896 trips per month. However, as shown in figure 5.1, this varied by size and type of CTO. Notably, secondary purpose groups were making considerably fewer trips than primary purpose organisations, which reflects both that transport is not the major part of their organisational purpose, and potentially that their passengers may require specialised transport.

15 Question wording: Based on the past year, please type the number of trips your organisation runs in a month. Please include each time a vehicle goes out to collect passengers.

Amongst primary purpose organisations, the average number of trips grows by income band. There is a large jump in the average number of trips between organisations with an income of £50k to £100k and those with an income of £100k to £250k: this gap is related the difference in the size of the two income bands.

Figure 5.1: Average monthly trips by income band and organisational purpose



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Similarly, there is some disparity in the average number of tips amongst rural and urban focused organisations. Urban focused organisations were making more monthly trips on average (1432) than rural focused organisations (469).

In total, an average total of 166,882 monthly trips were being made by 186 responding organisations. If expanded to the overall CTA membership, based on average totals for primary and secondary organisations by income banding, this produces a monthly total of nearly half a million trips per month and 5.8 million trips per year. As noted in section 1, the CTA membership is not the whole sector, so this the number for the whole sector will be larger.

5.3 Mileage

Respondents were asked to provide an average monthly mileage total including the number of 'dead miles' where the vehicle was not carrying passengers.

On average, CTOs were travelling 16,446 miles in a month, with 2.6 million miles covered in a month. The average vehicle trip length was 18 miles. It should be noted that this included a wide variety of different services, with different numbers of passengers on board. Nevertheless, there were some clear differences according to different types of CTO.

Mileage rose by size of organisation: CTOs with an income of up to £25k were travelling just over a thousand miles per month on average, whilst those with an income of over £1million were travelling over 37,000 miles per month.

Urban providers were making more trips with an overall higher mileage per month than rural providers, but their average vehicle trip length was much shorter: 9 miles compared to 23 miles in rural areas. Primary organisations had a slightly higher average mileage than secondary organisations and were making more trips.

5.4 Passengers

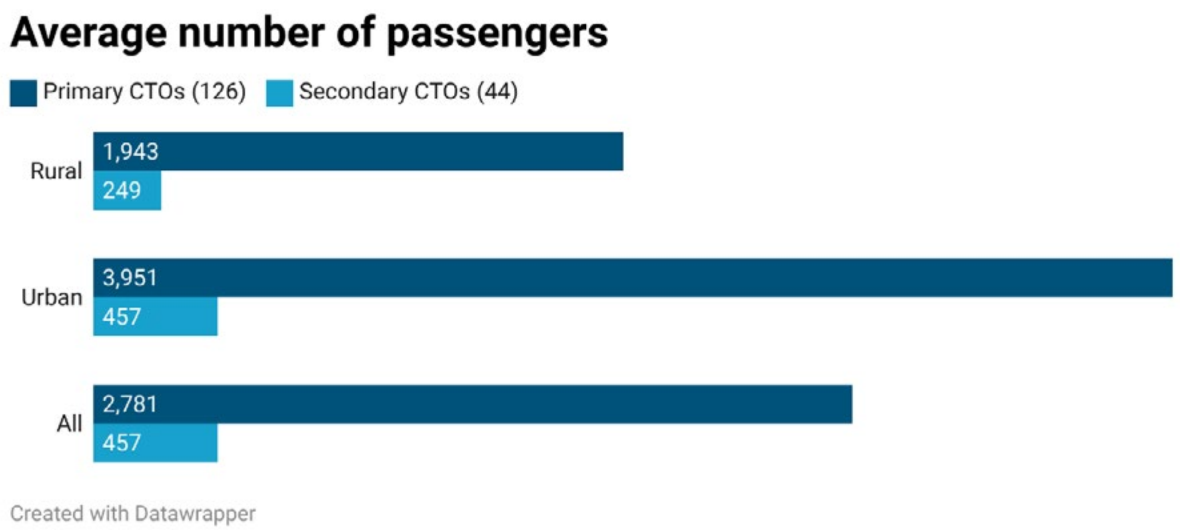
170 respondents were carrying over 370,000 passengers per month. On average CTOs were carrying 2179 passengers per month. Factoring up the average number of passengers by purpose and income bands to the overall CTA membership, gives a monthly estimated total of over 1 million passengers carried, with 13.8 million passengers taken annually.

Again, there were considerable differences between organisations. Smaller organisations, with an income of less than £25k per year were transporting 193 passengers per month on average, whereas the largest organisations, with an income over £1million, were carrying 8310 passengers on average.

Similarly, organisations who received income through contracts were carrying many more passengers than those who did not: 4438 passengers were carried on average by CTOs with contracts or service level agreements compared to 710 passengers per month by those without.

Number of passengers were generally smaller in rural areas than urban areas, as shown in figure 5.2. This reflects the wider pattern shown in these trip figures: CTOs working in rural areas were generally responding to a more dispersed population by conducting fewer trips that covered a greater number of miles and carried fewer passengers than the equivalent journeys in urban areas. Figure 5.2 also shows the lower number of passengers by secondary purpose organisations in comparison to primary purpose CTOs.

Figure 5.2: Average passenger in rural and urban areas



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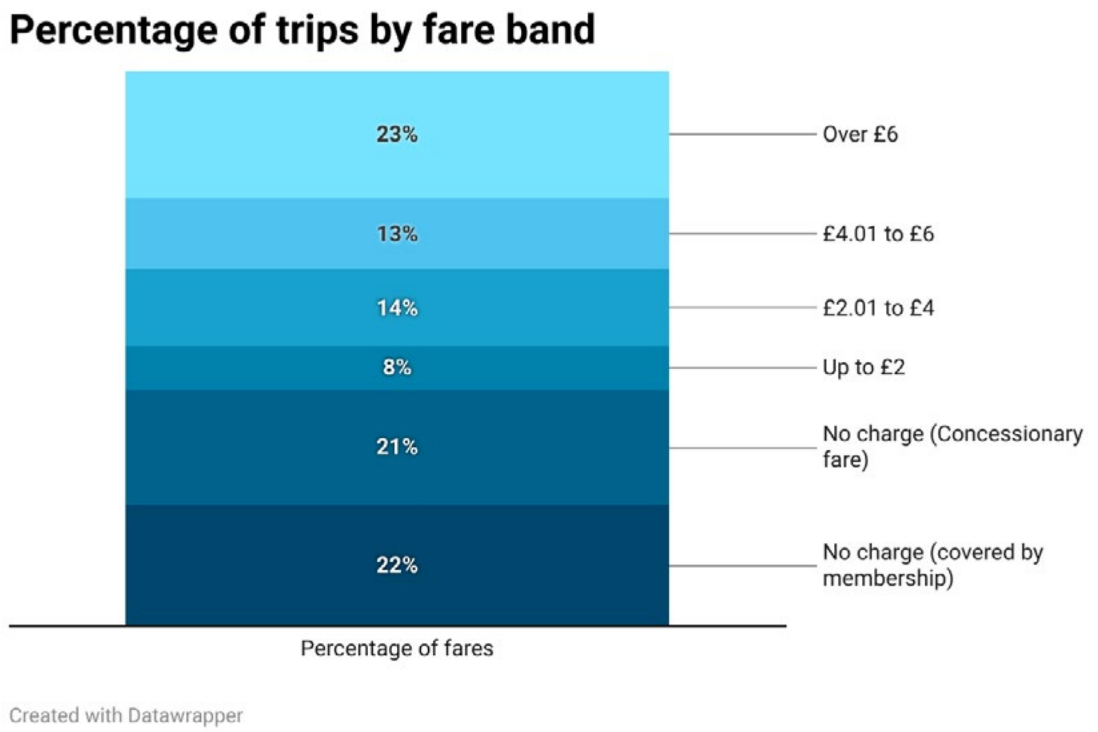
5.5 Fare Bands

As shown in figure 5.3, fare charges varied across the sample. 43% were not directly charged, with cost either covered by membership or a concessionary pass. Almost a quarter of fares cost over £6.

Figure 5.3: Percentage of trips per fare band



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However, this charging varied by type of organisation. For instance, 3% of journeys by secondary purpose organisation were covered by concessionary fares, compared to 22% amongst primary purpose organisations. Conversely, 29% of trips made by secondary purpose organisations were paid for by membership costs, compared to 21% amongst primary purpose organisations.

There were also differences according to the rural or urban focus of services. 33% of trips made by urban focused organisations were costing over £6, compared to 19% in rural areas. 34% of trips in rural areas were covered by concessionary fares, compared to 18% in urban areas. However, whilst it is not possible to break these figures down by type of service, it is likely that the higher proportion of concessionary pass use in rural areas is in part due to the higher proportion of community bus routes in these areas.

5.6 Journey planning

37% of respondents were using journey planning software to plan their operations. This was more common amongst larger groups: more than two thirds of those with an income above £250,000 were using a version of journey planning software.

However, there was little commonality in the software used. CATSS was the commonly named system, but there were 17 different types named, not including the several organisations who used their own bespoke system.

It is arguable whether this disparity of software represents a strength or a weakness for the sector. CTOs will have chosen a package to best fit their needs in most cases, but equally this wide range of systems make it difficult to standardise data across the sector.

Derbyshire Community Transport

6. Vehicles

Vehicles are vital to Community Transport, whether owned by the CTO or volunteers, but are expensive to buy, operate, maintain and replace.

In keeping with the accessible nature of Community Transport, three quarters of minibuses and four fifths of multi-person vehicles (MPVs) owned or leased by CTOs are wheelchair accessible. However, the fleet is ageing: two fifths of diesel vehicles are pre-2015. Likewise, there are low levels of electric vehicles in the sector

New vehicles are likely to be Euro 6 diesel vehicles but there are still a high level of older vehicles and a low number of new electric vehicles being purchased. Cost is the key barrier, although half of those without EVs have doubts about the suitability of electric vehicles for their services. Further research is planned to understand what is needed to encourage take up of electric vehicles, both in terms of understanding demand for this type of vehicle and suitable funding mechanisms.

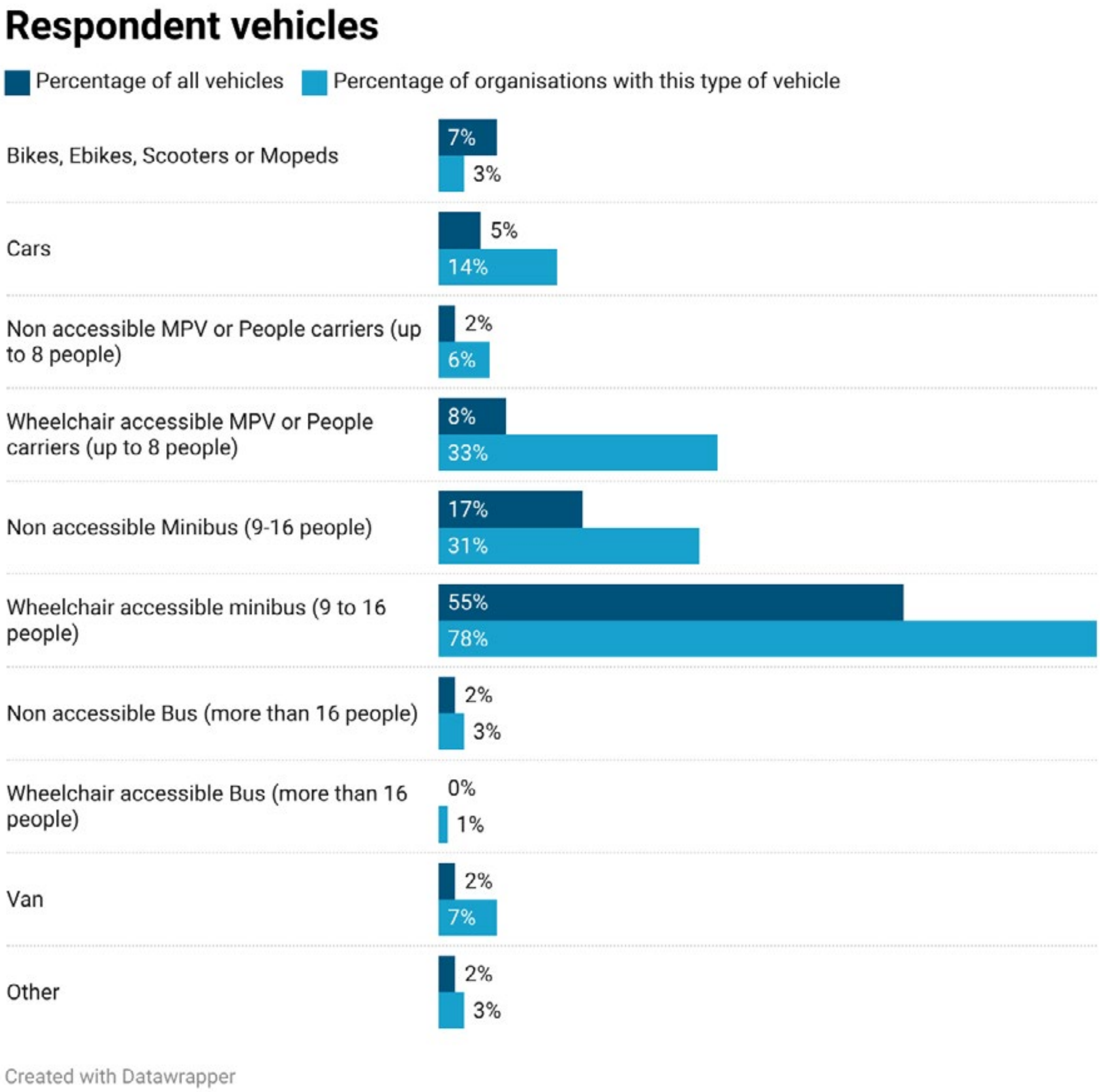
As shown in section 7, securing new vehicles is one of three main priorities for CTOs. Responses in section 2 show that purchasing new vehicles requires a mixtures of finance sources, including grants, saving and fundraising. CTA will continue to work with the sector, manufacturers, dealers and funders, to identify opportunities for suitable new vehicles and ensure that dedicated vehicle funding reaches CTOs.

6.1 Types of vehicles

Not every Community Transport organisation owns vehicles. 17% of respondents did not own or lease their own vehicles, most noting that they were a volunteer car scheme and supported volunteers to use their own vehicles. 83% of respondents did own or lease vehicles, but it is important to note that many also ran volunteer car schemes, so also supported their vehicle capacity with volunteers' vehicles.

Figure 6.1 shows the range of different types of vehicles owned by respondents.

Figure 6.1: Vehicles owned or leased by respondents



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Community Transport is sometimes characterized as transport by minibus. Whilst figure 6.1 shows this is reductive, it does illustrate that 9-16 person minibuses are still the most popular vehicle type.

Overall, over 2000 vehicles were identified by respondents, on average 10 per organisation.

Figure 6.1 also illustrates the high percentage of these vehicles that are wheelchair accessible: 76% of 9 to 16 seat minibuses were wheelchair accessible and 83% of MPV or people carriers were wheelchair accessible.

6.2 Fuels

39% of diesel vehicles were older than Euro 6 rating. Vehicles older than Euro 6 have the potential to be charged for Clean Air Zones.[16] Community Transport is exempt from charging in some but not all CAZ areas and those exemptions are for a limited period. Moreover, given that Euro 6 was introduced in 2015, this also illustrates that two fifths of diesel vehicles are over nine years old.

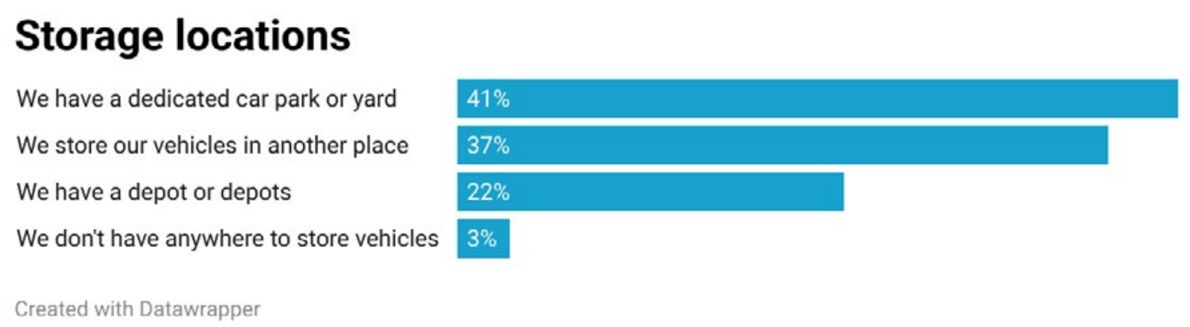
A small number of vehicles had petrol engines: 8% of these were older than Euro 4 rating (before September 2006). Euro 4 is the minimum standard for emissions for petrol vans, minibuses, taxis, private hire vehicles and cars where they are included in CAZ schemes.

6.3 Storing vehicles

Suitable space to store vehicles is vital for several reasons. Organisations require easy access to vehicles to reduce 'dead' mileage, secure locations to protect vehicles from theft or vandalism and space to enable checks and maintenance to be carried out easily. For organisations looking to transition to electric vehicles, a location for charging points is also needed.

Figure 6.2 shows the wide range of locations used to store Community Transport vehicles. Three fifths had either a dedicated car park or yard, or a depot.

Figure 6.2: Locations for storing vehicles



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Within the 37% shown above, several 'other' locations were named. 16% of respondents were using a school, church, community centres or similar location that was owned by a local organisation or service. 14% were using homes or public car parks. 9% were using locations owned by local businesses such as garages, pubs or farms. Only one organisation named a depot shared with a bus company, but potentially there could be more of these types of agreement.

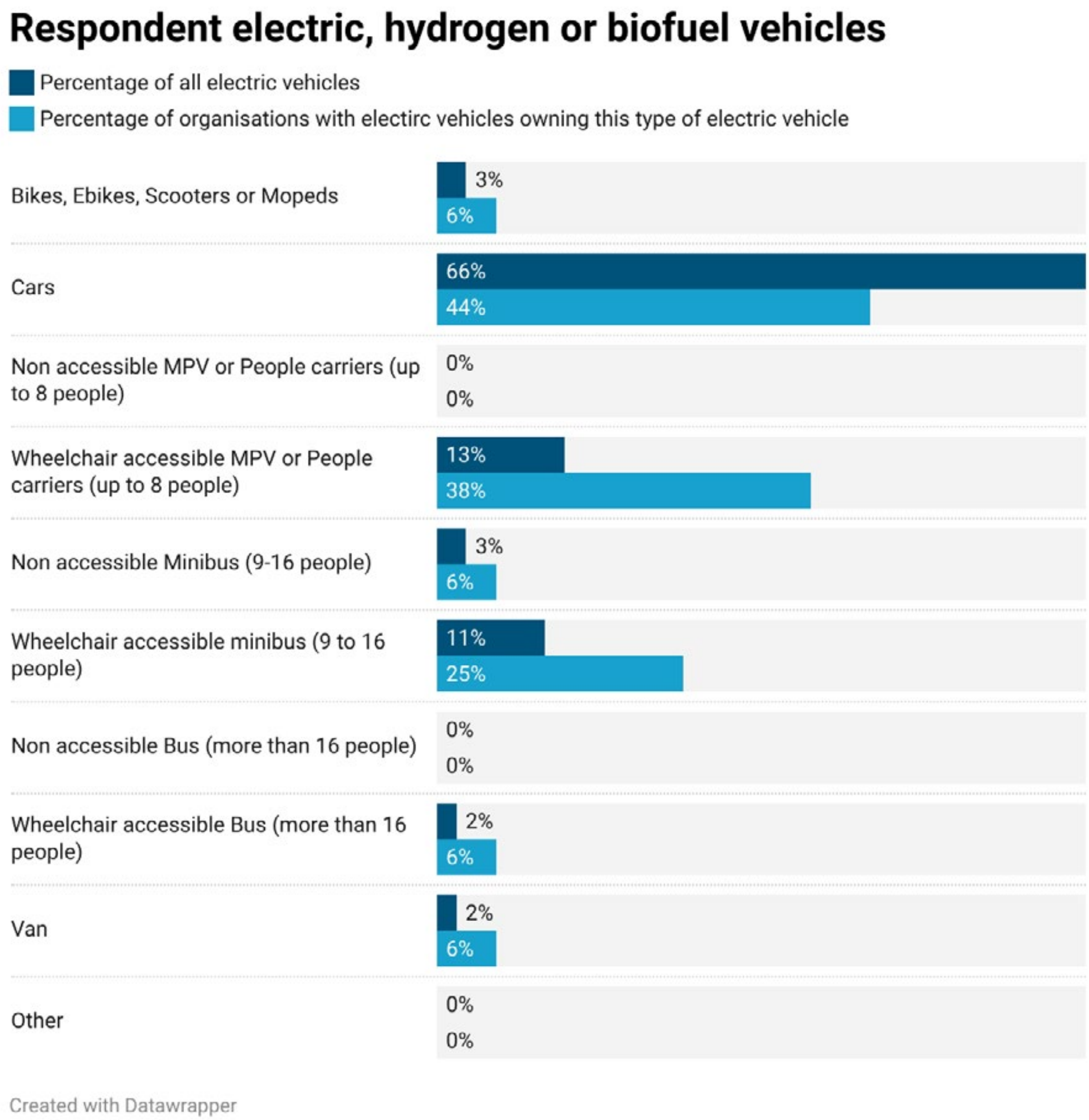
16 https://www.gov.uk/guidance/driving-in-a-clean-air-zone#minimum-emission-standards

6.4 Electric, hydrogen or biofuel vehicles

8% of organisations owned or leased electric, hydrogen or biofuel vehicles. Figure 6.3 shows that cars were the most popular form of this type of vehicle.

Electric, hydrogen or biofuel vehicles represented 3% of the overall fleet of Community Transport vehicles for respondents to the survey. 93% of electric, hydrogen or biofuel vehicles owned or leased by respondents were purpose-built vehicles, only 7% were retrofitted.

Figure 6.3: Breakdown of electric, hydrogen or biofuel vehicles amongst organisations that own or lease this type of vehicle



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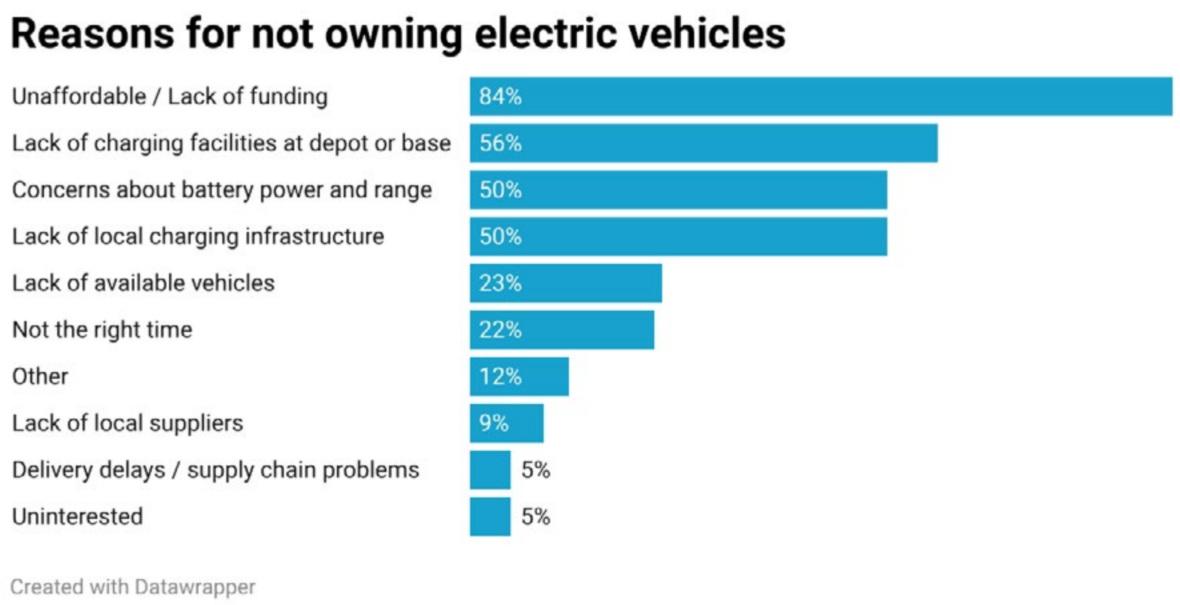
Notably, only 63% of respondents with electric vehicles had dedicated electrical chargers that enabled them to charge electrical vehicles when not in use, although one group had dedicated chargers, but not enough to charge all their vehicles. 38% of those with electric vehicles were using an alternative method of charging electrical vehicles (e.g. running an extension cable) or had no method of charging at all.

6.5 Barriers to Electric Vehicles

The cost of electric vehicles, or the lack of available funding to cover the cost, was the chief barrier to ownership, as shown in figure 6.4.

Figure 6.4: Reasons for not owning electric vehicles (N=183)



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Other key reasons included lack of charging facilities. As shown in Figure 6.2: two fifths of CTOs did not have their own yard or depot, so would be reliant either on public charging or a joint arrangement with the owner of their yard or car park.

Similarly, half were concerned about the availability of public chargers. CTOs may need fast chargers at destinations, particularly if making longer journeys, and it is important that such facilities are accessible for minibuses.[17] Chargers at destinations such as supermarkets, health facilities and leisure locations are crucial to enable minibuses to charge whilst passengers are using the facilities. Other named issues included a lack of space or capacity in electric vehicles due to batteries, weight and lack of towing capacity.

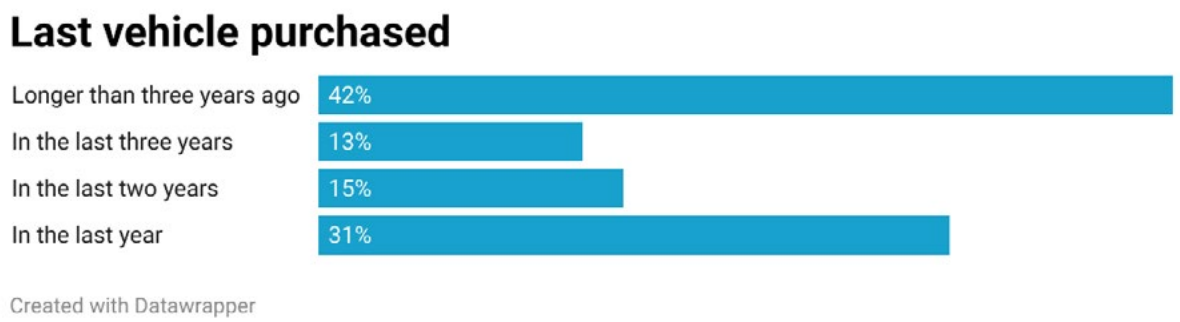
However, only 5% were uninterested in electric vehicles, highlighting that CTOs would be willing to make the transition if practical problems could be overcome.

17 For example see Motability's research on accessible EV charging, which notes the need to consider minibus use.

6.6 Purchasing new vehicles

Two fifths of respondents had not purchased a new vehicle for more than three years, as shown in figure 6.5.

Figure 6.5: Length of time since last vehicle purchase



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Smaller groups were less likely to have purchased vehicles recently: for instance, only 6% of CTOs with an income of less than £25k had purchased a vehicle in the past year, compared to 47% of CTOs with an income of over £1 million.

As an average, vehicles cost approximately £40k, although this figure covered a wide range of different types and ages of vehicles.

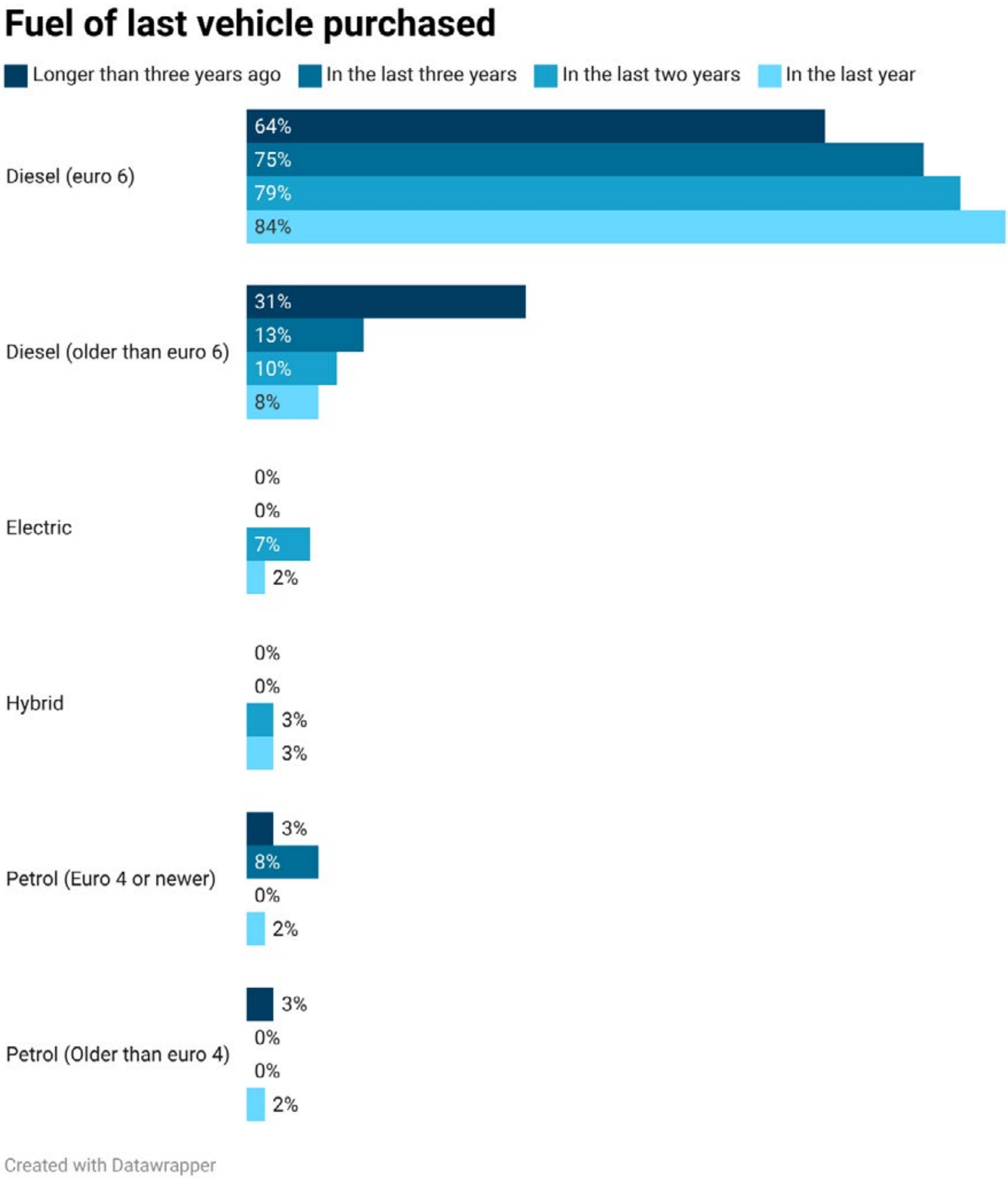
The last vehicle purchased was 3 years old on average, although 58% of vehicles were brand new. Secondary organisations were, on average, buying slightly older and cheaper vehicles than primary organisations.

The fuel of the last vehicles purchased are shown in figure 6.6. This shows the dominance of diesel vehicles and shows the increase in Euro 6 purchases over the past three years.

However, figure 6.6 also shows a low percentage of electric or hybrid vehicles purchased. These are concentrated in the past two years showing an emergence of this market, although the lack of growth in the past year indicates that CTOs may require further support to purchase electric vehicles.

Respondents were also asked how long they waited for their new vehicles to become available. 50% waited for longer than three months. CTOs who waited for their vehicle noted some detrimental effects for this delay: for 19% there were reduced services due the lack of an available vehicles.

Figure 6.6: Last vehicle purchased by fuel



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7. Policy and priorities

It is more important than ever to engage with key stakeholders and get involved in policy discussions. We've seen in the previous sections that while the Community Transport sector delivers a variety of vital services to a wide range of passengers, the sector does face considerable challenges.

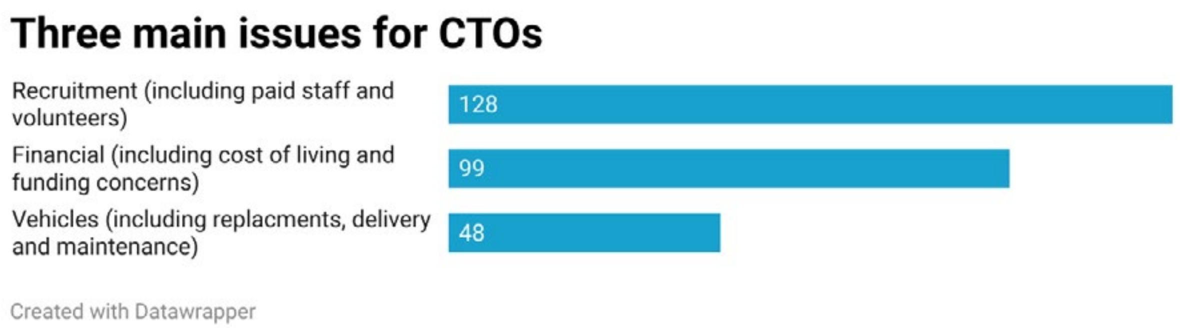
The three main policy priorities set out in responses reflect the challenges set out elsewhere in this report: recruitment of staff and volunteers is huge issue potentially limiting the capacity of the sector, funding is vital for operational costs and sustainable funding is vital for planning, whilst vehicles need replacing to ensure reliable services, comfort and accessibility for passengers, and to limit emissions from the fleet.

Crucially, responses show a disconnect between CTOs and local transport decision making. Improving this connection is crucial, both to the sector and for transport planners themselves. It is vital that the role played by the sector in the provision of non-commercial, accessible services is recognised and operators are supported to continue their operations. CTA's policy programme will work to ensure that the connections between Community Transport and central, regional and local government are strengthened and new relationships with health authorities can flourish.

7.1 Sector priorities

Survey respondents were asked to state the three biggest issues facing them over the coming year. The response to this question highlighted a range of issues, grouped into the three main themes in Figure 7.1.

Figure 7.1 Three main issues facing CTOs in the coming year (n=166)



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Recruitment of both paid and voluntary staff was the most common issue raised. Recruitment, in this case, included a range of concerns, from not being able to bring in enough staff and volunteers to meet demand, worries around an ageing workforce, D1 Licensing and bringing in trustees.

"We need more (younger) drivers. We need more (younger) administrative volunteers"

"Younger people who want the jobs do not have the D1 on their licence, this is what is killing us staff wise"

"Recruiting volunteers and volunteer availability. Our volunteer pool is generally maintaining itself but not growing with demand. Volunteers often have other responsibilities (i.e. staying in work longer or returning to work, grandparent and carer responsibilities etc) and are an aging population."

Financial challenges, which cover issues such as funding and recent cost of living inflationary pressures, were an issue for three fifths of those responding. Around three fifths of these comments concerned funding, whilst two fifths focused on inflationary pressures such as maintenance and staff costs.

"Concerns about Local Authority funding continuing and having to apply for grants if this is cut."

"Increasing running costs and rising wage bills whilst trying to secure funding. Increasing demand on services, with a higher volume of client and professional referrals.

Concerns relating to vehicles were also common. Vehicle issues include the maintenance of current vehicles, the replacement of current ones and the delivery of new ones.

"Our minibus is now very old and we have spent a lot of money on repairs for both the bus and the tail lift this last year. We are getting to the point where we need to buy a new minibus for the safety of our passengers but there are few places that will fund vehicles that we know of."

"Funds for the next new bus. We are not for profit so it is an ongoing battle for funds. Increasingly, organisations such as the National Lottery will not accept an application unless it is for an electric bus. Our trips can be long distance and an electric bus, especially in the winter would not be suitable and we cannot afford to install infrastructure and the farmer would not allow his yard to be dug up. It is a major problem."

These topics feature heavily in CTA's Manifesto, where calls are made for fair multi-year Community Transport funding and for changes to driver licencing, specifically granting B licence holders category D1, enabling them to drive minibuses over 3.5 tonnes or 4.25 tonnes if accessible. Other, less common, concerns raised in include low and high demand for services, political and regulation concerns and concerns around the age/mobility of passengers.

7.2 Connections to decision makers

Connections with local authorities are key for Community Transport as it is the local authority/ transport authorities which sets the plans for transport in a local area. The power that local authorities have to set the direction of transport may even increase over the coming years as devolution continues to be a key agenda in the transport sector. For example, granting powers around bus franchising has featured heavily in transport discourse since Greater

Manchester took the decision to pursue a franchised model in 2021 and is encouraged by new legislation by the incoming Labour government.[18] CTOs being connected to local government and other local stakeholders is more important than ever.

Due to the importance of these connections, we asked survey respondents a range of stakeholder connection questions including whether they felt connected to decision-making (see figure 7.2) and who they have connections with (see figure 7.3).

Figure 7.2: Connections to local transport decision making

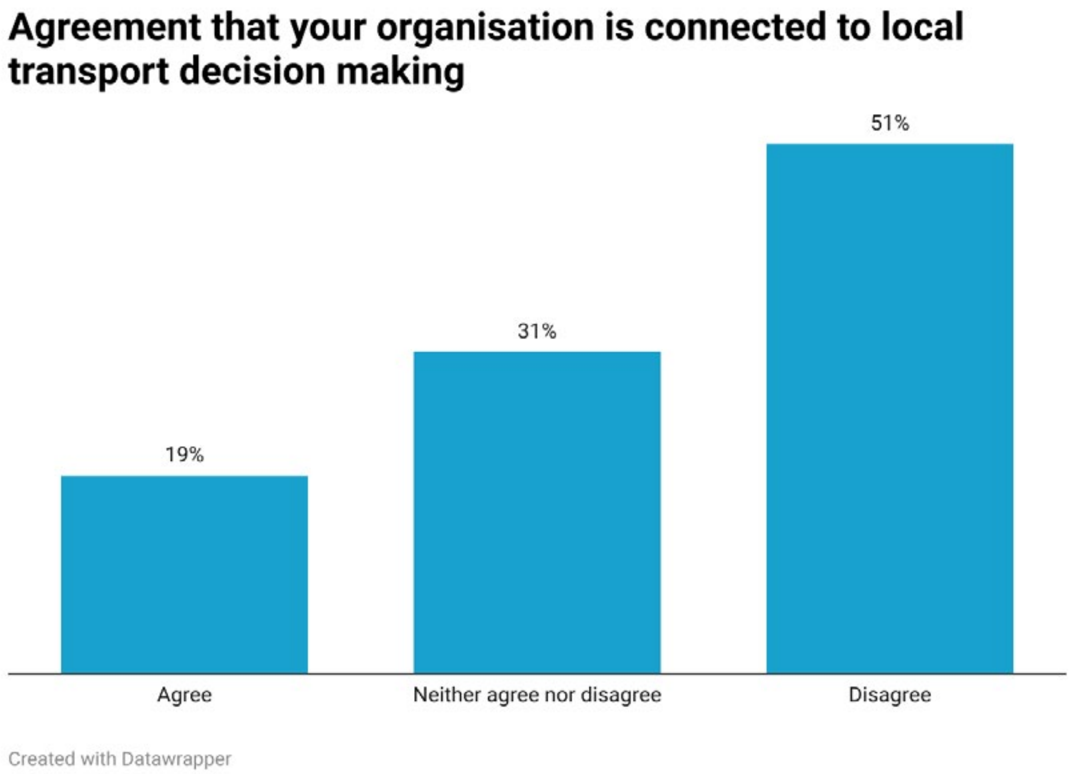

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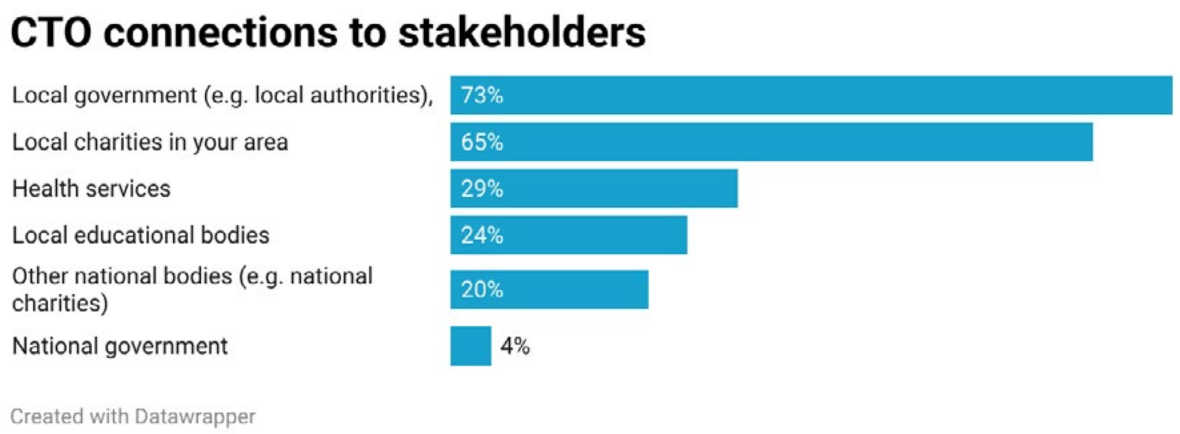
Figure 7.2 shows that over half of respondents did not feel connected to local transport decision making. Whilst not every CTO will want to be involved in all transport decisions, this level of disconnect is concerning. It suggests that many opportunities to connect Community Transport to the wider transport network are being missed.

18 See the King's Speech 2024

Figure 7.3: Connections to local stakeholders



Despite low perceived engagement with transport decision makers, figure 7.3 shows that almost three-quarters of CTOs are in contact with local authorities. This suggests that CTOs may not be connected to the specific transport officers within their local authority, or may feel that their voice is not heard, despite their connections.

We would like to see all local transport authorities fully engaging with and listening to the sector in the development of their next Local Transport Plans. CTA understands this must be a two-way relationship, and the Community Transport sector must ensure they are informing authorities about what they do and the needs of the passengers they serve.

Along with connections to local authorities, Figure 7.3 also shows only three-tenths have connections to health services and a quarter with local education. Secondary providers were more likely than primary providers to have connections to the health service, it is likely that this is due to having a main charitable purpose connected to heath or social care.

Figure 7.4: Connections to local stakeholders by income

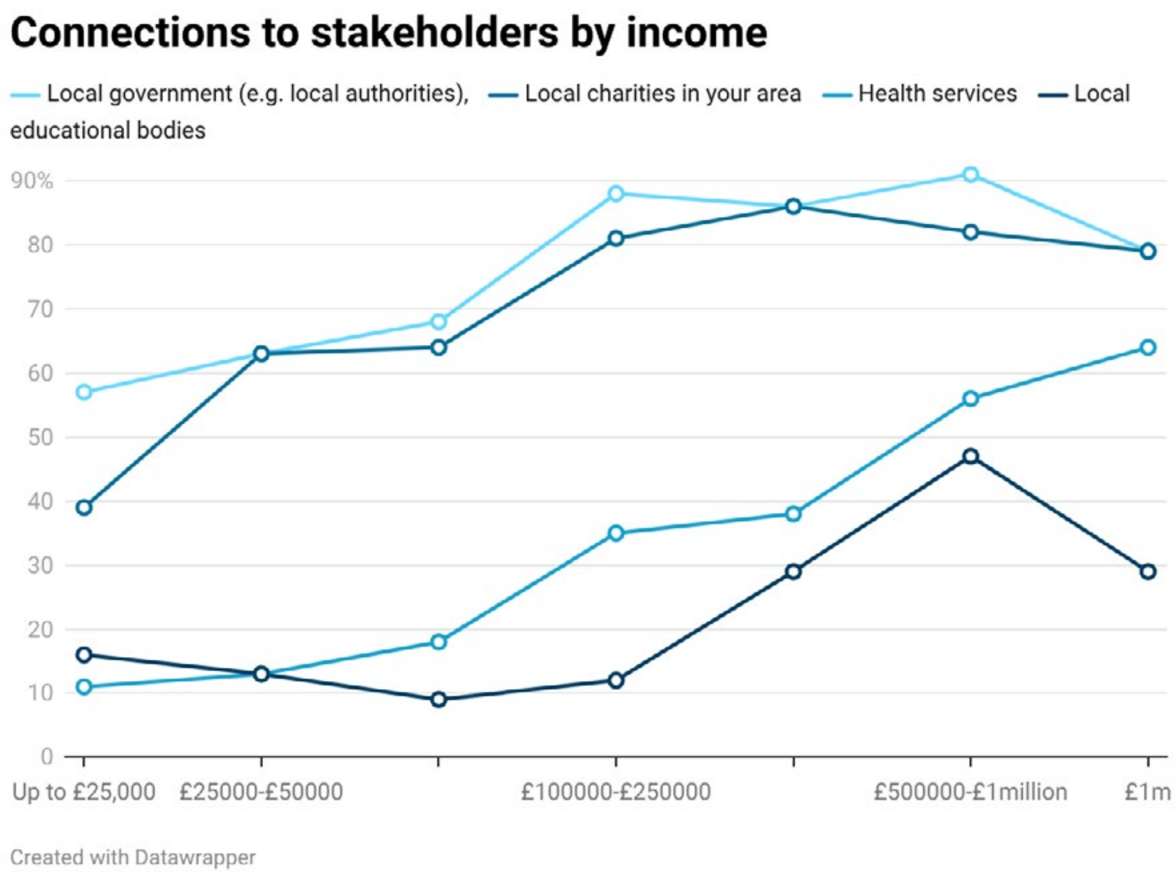


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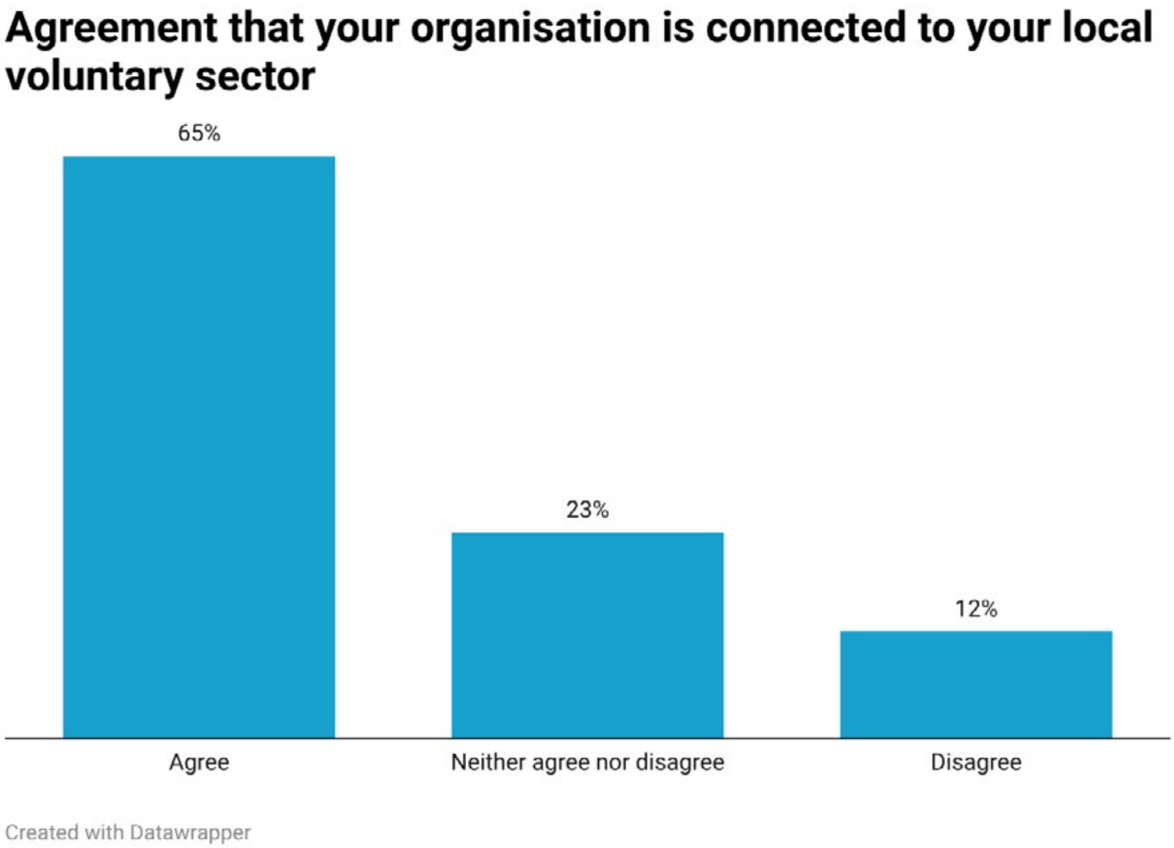
Figure 7.4 shows that high-income groups are generally better connected than smaller CTOs. This may be down too larger organisations being more likely to have the paid staff that can build these connections.

These results show a need for the sector and CTA to build greater connections to stakeholders, to showcase the work of CTOs, the transport needs that the sector meets and social value that it generates. There are several policy areas where Community Transport could be more heavily represented. CTA's analysis of Bus Service Improvement Plans found that only 1 in 10 fully integrated Community Transport into the overall plan and half had either no mention or limited mentions of Community Transport within the text. Ongoing opportunities to engage in Local Transport Plans and bus franchising, may also offer the possibility of widening awareness of Community Transport and its importance in providing accessible local transport.

Figure 7.5: Connections to the local voluntary sector



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Being charities and non-profit organisations, the connections between CTOs and the wider voluntary and community sectors are also important. Collaboration between CTOs and these other organisations ensure VCSE services are accessible for the people who depend on them. The importance of these connections is reflected in Figure 7.5, which shows nearly two-thirds of CTOs feel well-connected to the wider VSCE, and only around a tenth said they were not well-connected. It is also reflective of a sector where 51% of organisations provide group hire and 49% note that one of their key passenger groups are local VCSE organisations (see section 4 for details).

8. Survey Method and Response

The Mapping England survey was developed in consultation with a stakeholder group, comprising CTA members, local and transport authority representatives, health bodies and representatives of a VCSE umbrella organisation. The questionnaire was discussed and reviewed by this group, as well as with CTA's country directors, who were able to provide a wider UK perspective and consider how this research could be replicated throughout the UK.

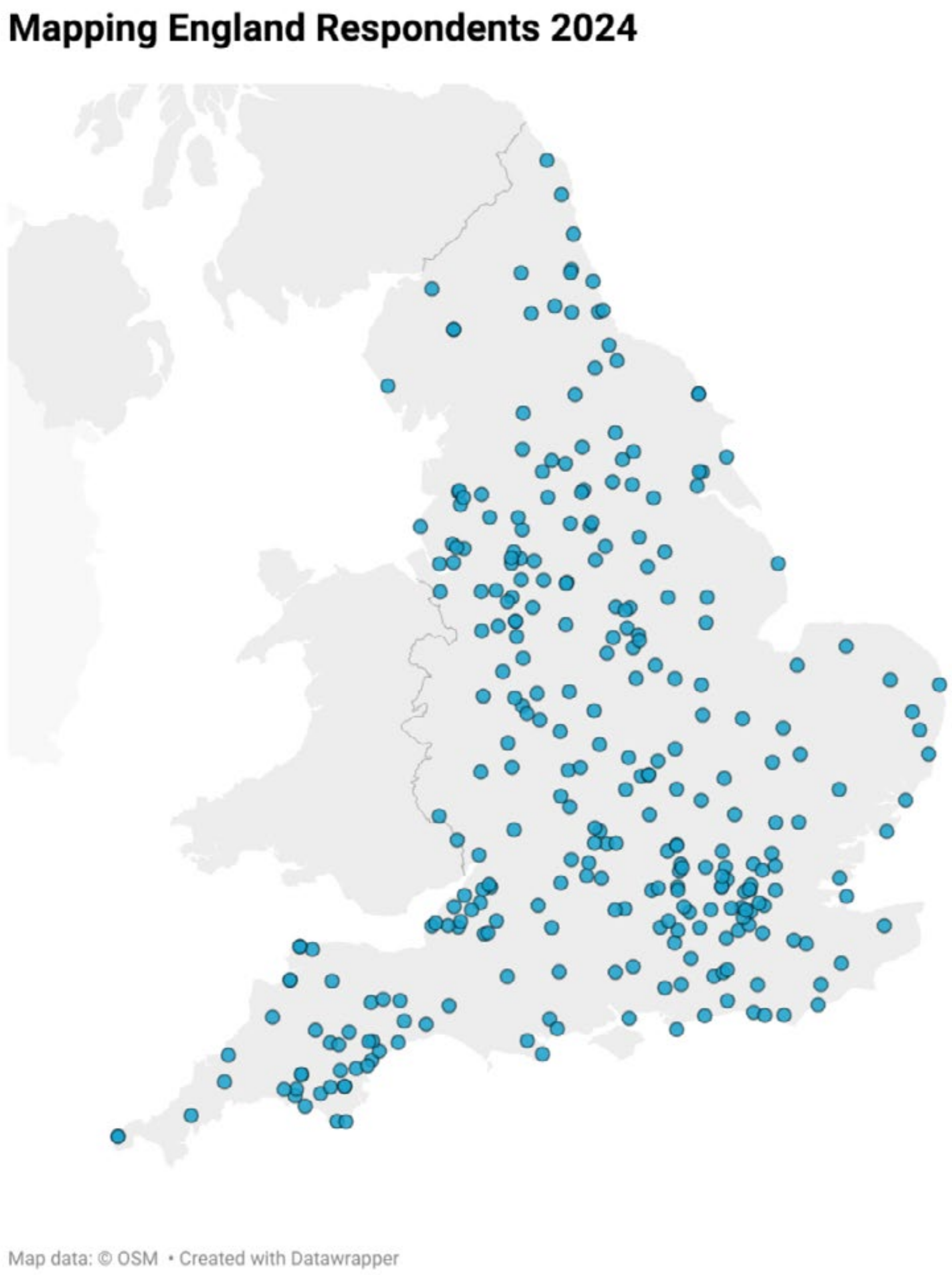
The survey was undertaken with CTOs throughout England. An online questionnaire, with hard copy options, was open between November 2023 and February 2024. The survey was distributed to all CTA members and further distributed through CTA's stakeholder network, to reach non-members.

The survey response is compared to the CTA membership below. This shows that the response was broadly representative of the membership and where it is not, this is generally due to a boosted responses amongst volunteer car schemes, which we know to be underrepresented in CTA membership.

Halton Community Transport

8.1 Mapping England response

Figure 8.1: Mapping England Responses



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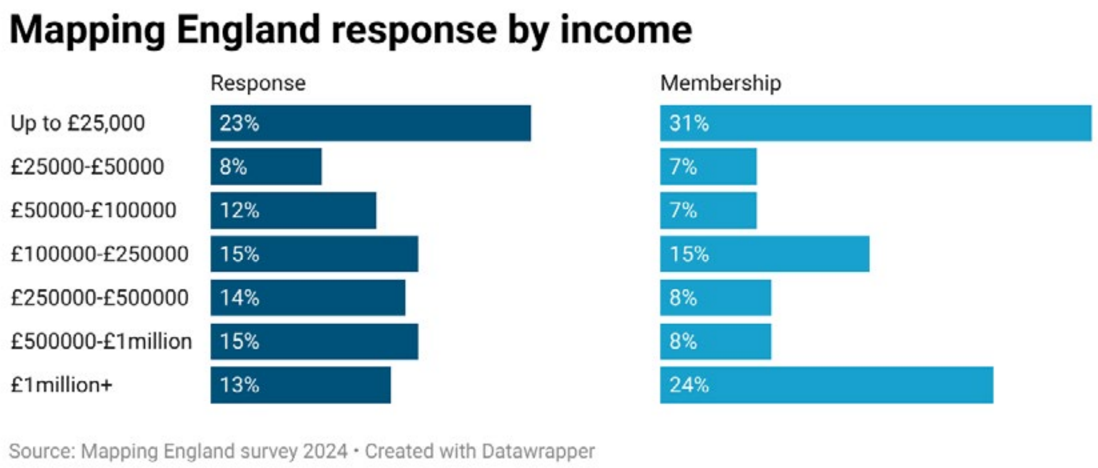
After data cleaning, 302 organisations returned the survey. 201 fully completed the questionnaire. Not all respondents completed the survey in full and so the base number of respondents is reported by question. Public bodies and schools have been removed from analysis unless stated. Data in this report is presented is unweighted. As shown in figure 1.2, the response to the survey was broadly representative of the CTA membership in terms of annual income, with an under-representation of the smallest and largest CTOs. Smaller groups are less likely to have staff or volunteer capacity to engage with a lengthy survey such as the Mapping England survey. Nevertheless, a quarter of the overall response was from such groups.

Fig 8.2: Mapping England Response by income band



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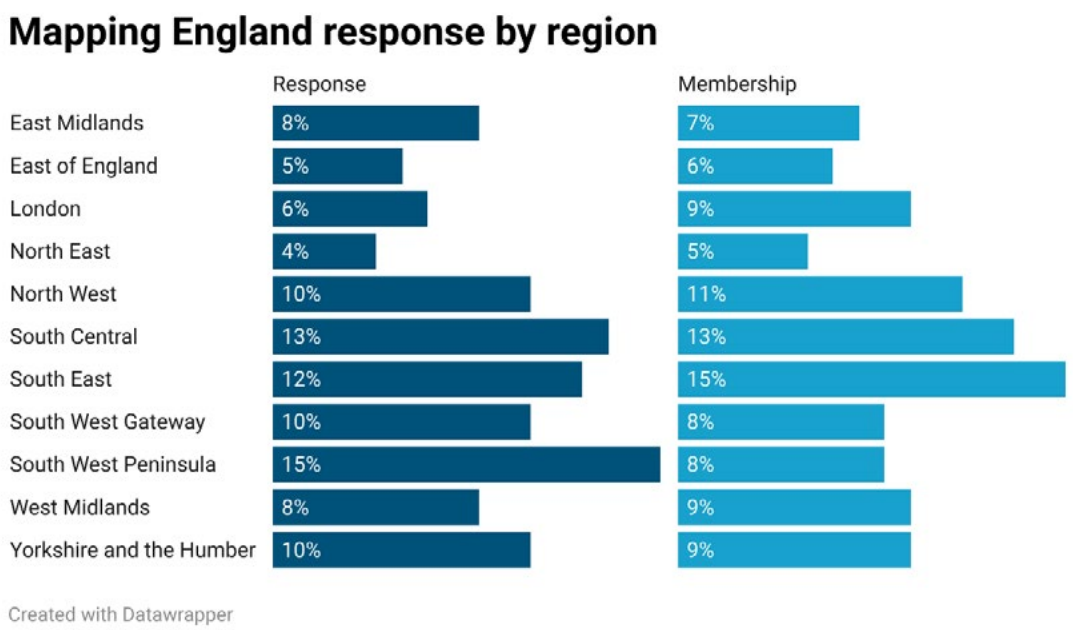
The geographic spread of respondents also broadly represents the CTA membership, according to the CTA regions, which are areas created by the CTA for our England forums and which follow the footprint of Local Transport Authorities.

Fig 8.3: Mapping England Response by CTA region



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Given this comparison, we can be confident that the response is broadly representative of the CTA membership.

This report was written by Nick Mills, Research and Insight Manager for the Community Transport Association. If you have any questions or would like to discuss the report, please contact england@ctauk.org.

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