

Transportation Provider Survey

Quantitative Survey Findings

April 2024

Research for:



Conducted by:

Southpaw *Insights*



Table of Contents

BACKGROUND	3	DETAILED FINDINGS (CONTINUED)	
• Background and Purpose	4	• Funding	29
• Survey Administration	5	• FTA Section 5310 Funding	34
• Profile of Survey Respondents	6	• Fares	40
EXECUTIVE SUMMARY	9	• Challenges and Needs	45
DETAILED FINDINGS	13	• Initiatives	51
• Transportation Service Providers	14	• Coordination	56
• Services Provided	20	• Diversity, Equity, and Inclusion	62
• Accessibility of Rides	24		

Background

Background and Purpose

In 2023, the National Aging and Disability Transportation Center (NADTC) partnered with Southpaw Insights to commission a survey of transportation providers that serve older adults and people with disabilities. The survey was intended to update data collected in a previous Transportation Provider Survey conducted in 2019, as well as identify work being done by transportation providers to address coordination and diversity, equity and inclusion. NADTC's report on groundbreaking research conducted in 2021 identified and documented the transportation experiences of diverse older adults, people with disabilities, and their caregivers.

This Provider Survey Report is intended to describe the experiences and perspectives of providers to add to NADTC's knowledge and help us better target the information and technical assistance we offer to the ever-changing transportation field in meeting the mobility needs of older adults, people with disabilities, caregivers and communities. We hope that transportation providers will use the data to compare their programs with others and identify areas where they can make improvements.

Survey Administration

Methodology

In partnership with NADTC, Southpaw Insights created and fielded a 10-minute online survey and received **445 responses** from those who provide transportation services to older adults and people with disabilities.

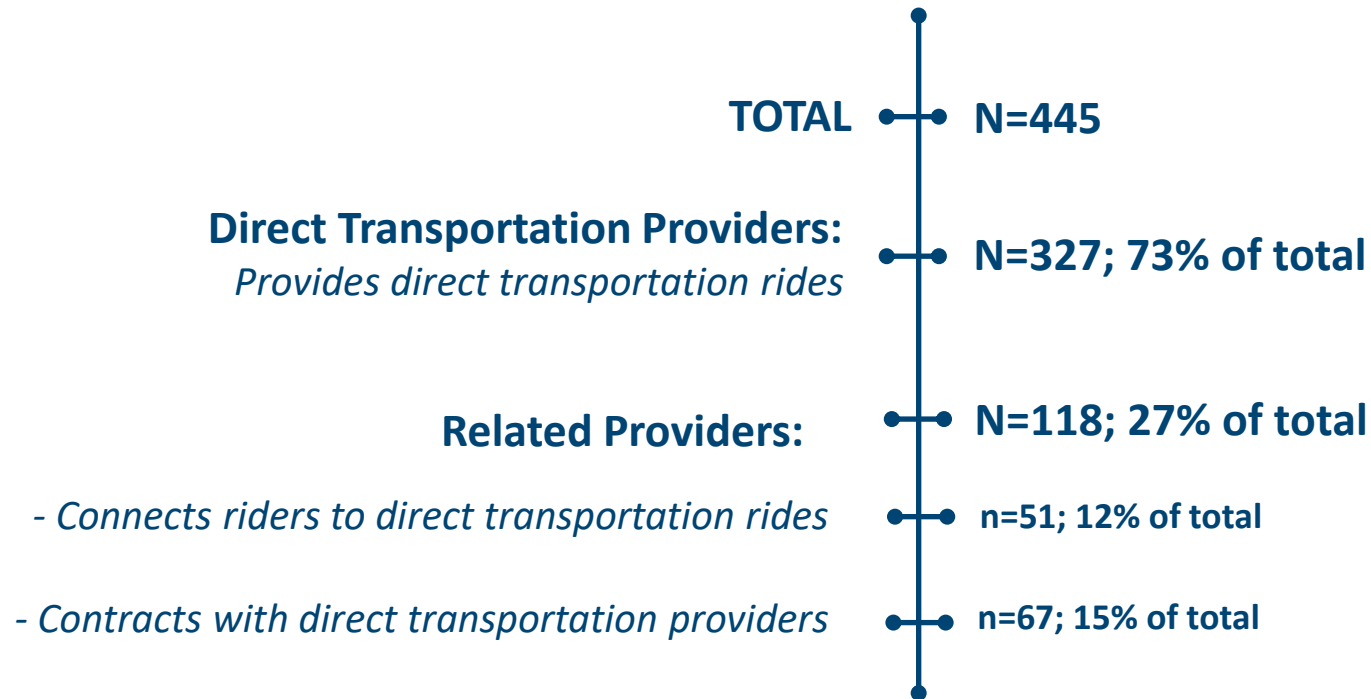
Two distinct types of providers are featured in this report:

- **Direct Transportation Providers** who administer programs that provide rides to older adults, people with disabilities, and/or the general public
- **Related Providers** who connect people to rides or contract with Direct Transportation Providers

NADTC distributed a survey link to its database of transportation organizations and worked with a communications firm, The Hatcher Group, to conduct a robust outreach campaign. The survey was fielded from October 30, 2023, through November 30, 2023.

Profile of Respondents: Total Survey Responses

Transportation Service Groups*



Profile of Transportation Service Providers* (N=445)

Organization	%
Public Transit	34
Human Services Agency/Organization	19
Area Agency on Aging	18
Senior Center	16
Aging and Disability Resource Center	13
Community Action Agency	6
Center for Independent Living	5
Healthcare organization	2
Transportation Network Company (Uber, Lyft, etc.)	2
Assisted Living/Nursing Facility	2
Taxi Provider	1
Other for-profit sector	3
Other public or non-profit sector	21
Other	5

Funding Sources	%
FTA Section 5307	12
FTA Section 5310	53
FTA Section 5311	28
Other FTA	7
Older Americans Act	27
Tribal Transportation Funding	1
Other Federal Funding	8
State	48
County	38
City	22
Tribe	1
Other Local Funding (e.g., tax levy, fundraising, etc.)	28
Fares	38
Donations	41
Other	20

Geographic Area Served	%
Rural	74
Urban	40
Suburban	35
Frontier / highly rural	7
Tribal	4
Other	4

Riders Served	%
Older adults (ages 60+)	94
People with disabilities	87
General public	51

Area of Provided Services	%
Multiple counties	29
Single county	28
Multiple cities/towns/municipalities	17
City/Town/Municipality	13
Regional/Multi-state	4
Statewide	1
Tribal lands/Reservation/Pueblo	1
Other	7

Executive Summary

Summary of Findings

Survey Respondents A total of 445 survey responses were received from 49 states and the District of Columbia. Respondents included 327 (73%) direct transportation providers and 118 (27%) related providers who connected riders to transportation or contracted with direct providers.

- Most survey respondents target their transportation services to older adults and/or people with disabilities.
- More than 70% of transportation providers who responded to the survey serve rural areas and most serve a single country or multiple counties

Transportation Services

- **Direct Transportation Services:** Non-emergency medical transportation is the predominant service provided by 67% of Direct Providers. About one-third restrict rides to specific purposes while many offer multiple types of services.
- **Related Transportation Services:** Outreach and education on community transportation options is provided by 58% of Related Providers and 46% of Direct Providers.

Summary of Findings

Accessibility Four out of five Direct Transportation Providers have wheelchair accessible vehicles. Almost all provide rider assistance such as ramps or lifts and help with boarding/alighting. More than half (60%) provide phone assistance with ride scheduling.

Section 5310 funding is the top funding source used by transportation providers in urban/suburban (57%) and rural/frontier areas (55%) and the second highest funding used by providers in tribal/other areas (49%).

- Transportation providers that receive Section 5310 funding are more likely to have wheelchair accessible vehicles.
- Section 5310 recipients are more likely to engage in coordination activities and be involved in diversity, equity and inclusion work compared to those who do not receive this funding.

Fares About three-fourths of Direct Transportation Providers offer free and/or reduced fares, most often determined by rider age. Most providers charge for rides, with cash being the most commonly accepted form of payment.

Challenges Hiring staff/staff shortages and lack of funding are the top challenges identified by more than half of survey respondents.

Summary of Findings

Initiatives Improvements in technology lead the way in new initiatives already implemented, in development or identified as a priority by transportation providers.

Coordination Collecting data, surveying riders and coordination in planning are the most frequent coordination activities in which transportation providers in all geographic areas are engaged.

Diversity, Equity, and Inclusion Across all geographic areas, the top DEI activities transportation providers are engaged in are diversifying staff and/or board members and providing materials in languages other than English.

Detailed Findings and Insights

Transportation Service Providers

Direct Transportation Providers are more likely to be public transit organizations while Providers that offer Related services tend to be Area Agencies on Aging

Type of Transportation Provider
Top answers shown

	Direct (N=327)	Related (N=118)
Public Transit	42% (N=136)	13% (N=15)
Human Services Agency/Organization	21% (N=68)	14% (N=17)
Senior Center	20% (N=66)	5% (N=6)
Area Agency on Aging	13% (N=41)	31% (N=37)
Ageing and Disability Resource Center	13% (N=41)	13% (N=15)
Other public or non-profit sector	19% (N=63)	26% (N=31)

Transportation Service Providers are most likely to be located in public transit agencies in all geographic areas

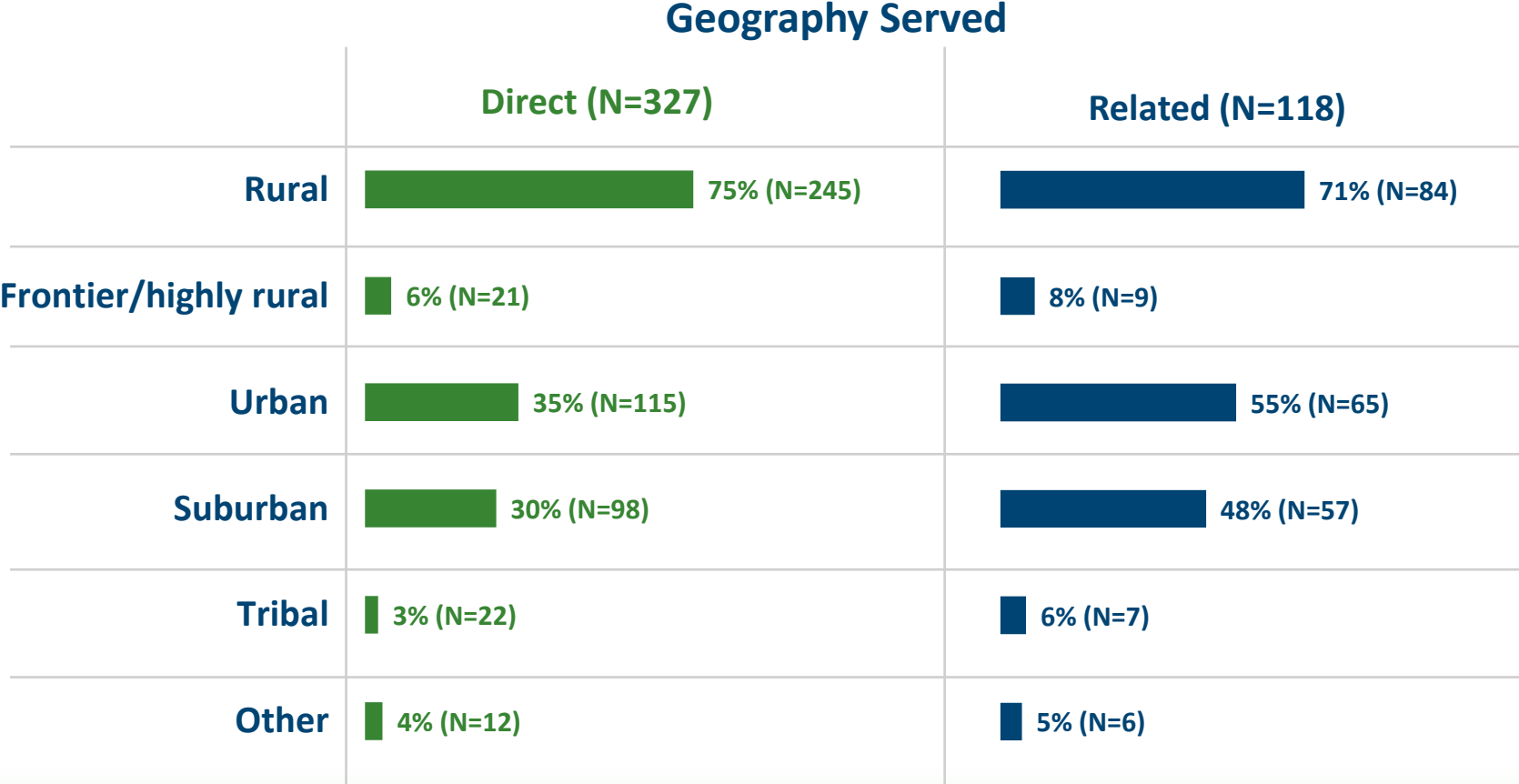
Type of Transportation Provider

Transportation Service Providers: N=445*

Top answers shown

	Urban/Suburban (N=237)	Rural/Frontier (N=336)	Tribal/Other (N=35)
Public Transit	30% (N=72)	34% (N=114)	49% (N=17)
Human Services Agency/Organization	20% (N=48)	21% (N=70)	11% (N=4)
Area Agency on Aging	17% (N=40)	20% (N=67)	9% (N=3)
Senior Center	15% (N=35)	16% (N=54)	9% (N=3)
Aging and Disability Resource Center	12% (N=28)	14% (N=48)	11% (N=4)
Other public or non-profit sector	24% (N=56)	20% (N=67)	26% (N=9)

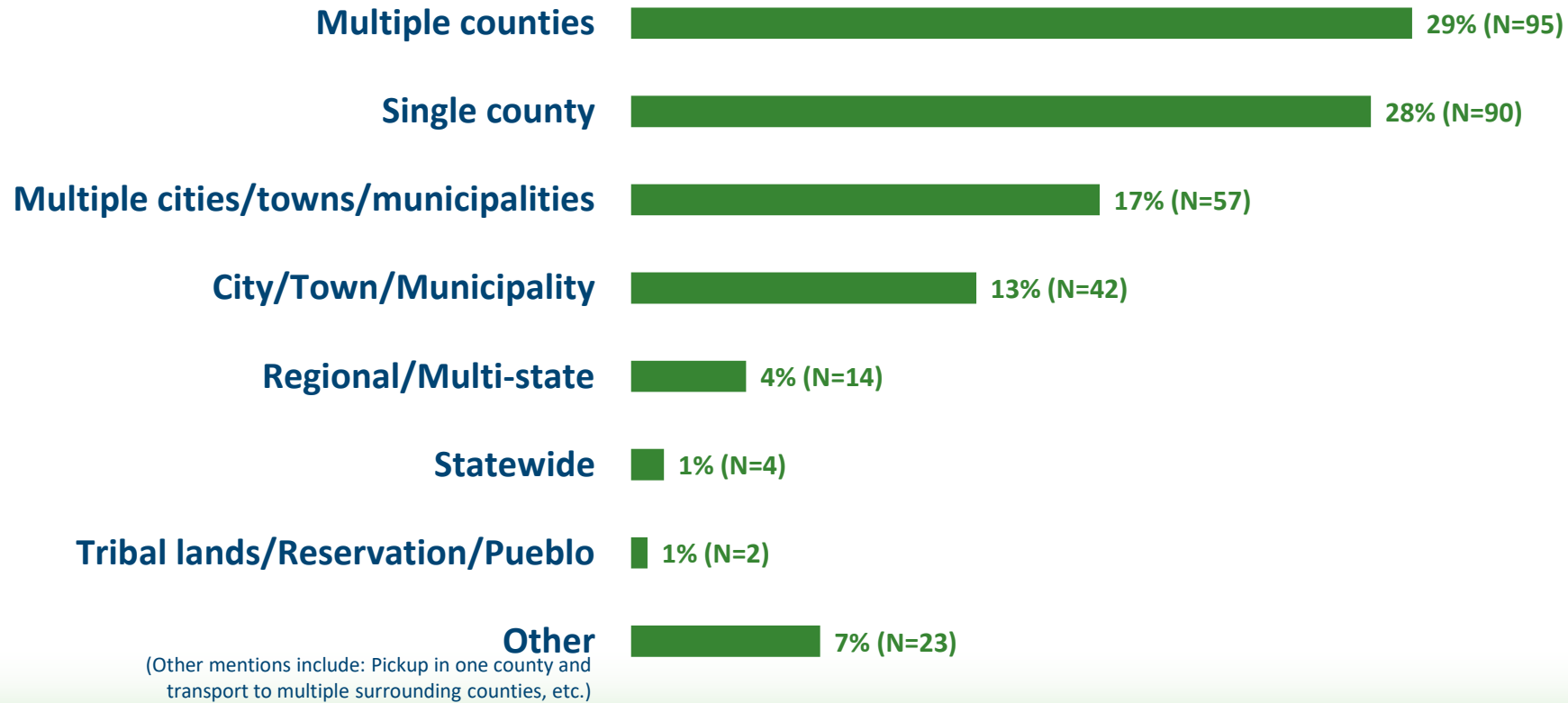
Most Transportation Service Providers who responded to the survey serve rural areas



Direct Transportation Providers are most likely to offer services in either a single county or across multiple counties

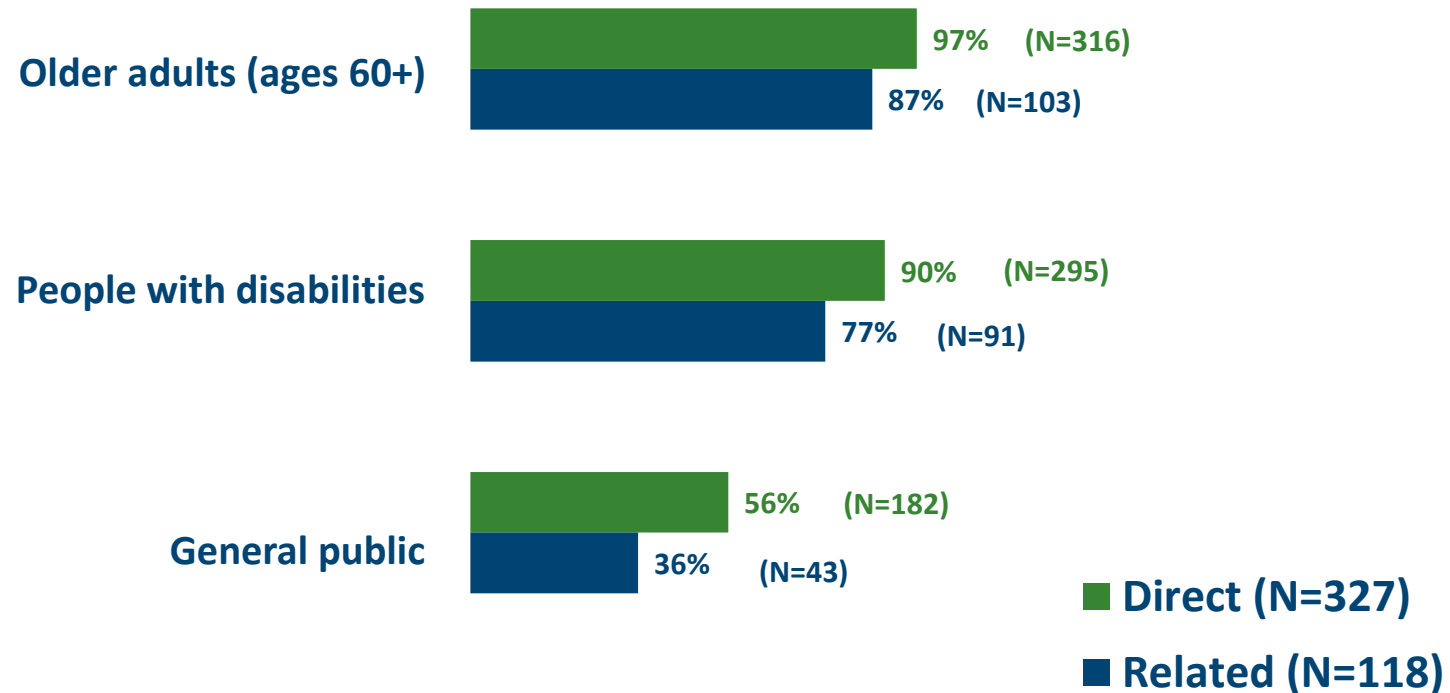
Areas of Provided Services

Direct Transportation Providers: N=327



Survey respondents most often target their services to older adults and/or people with disabilities

Populations Served

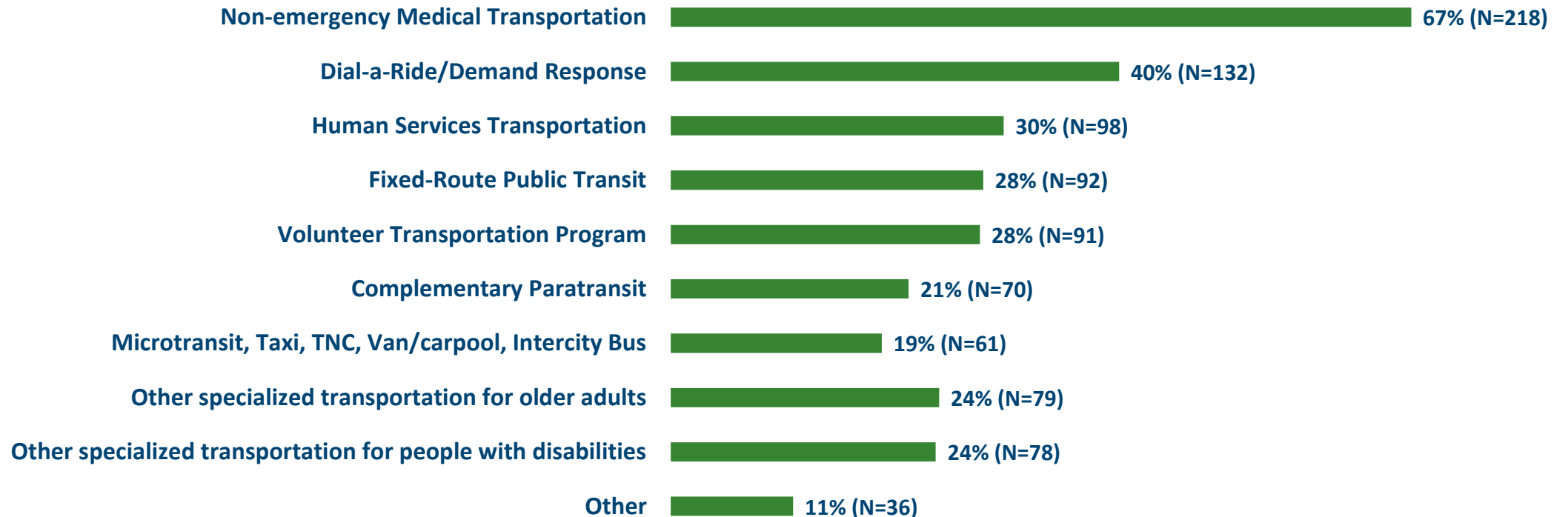


Services Provided

Direct Transportation Providers may offer multiple types of transportation

Transportation Services Offered

Direct Transportation Providers: N=327



Non-emergency medical transportation is the most frequent service offered by Direct Transportation Providers in all geographic areas

Types of Transportation Services

Direct Transportation Providers: N=327*

Top answers shown

	Urban/Suburban (N=157)	Rural/Frontier (N=250)	Tribal/Other (N=22)
Non-emergency Medical Transportation	59% (N=92)	70% (N=174)	64% (N=14)
Dial-a-Ride/Demand Response	36% (N=56)	44% (N=111)	36% (N=8)
Fixed-Route Public Transit	34% (N=54)	24% (N=59)	45% (N=10)
Human Services Transportation	28% (N=44)	31% (N=78)	32% (N=7)
Volunteer Transportation Program	26% (N=41)	32% (N=81)	14% (N=3)

Both Direct and Related Providers frequently offer outreach and mobility management

Types of Transportation Related Services*

Top answers shown

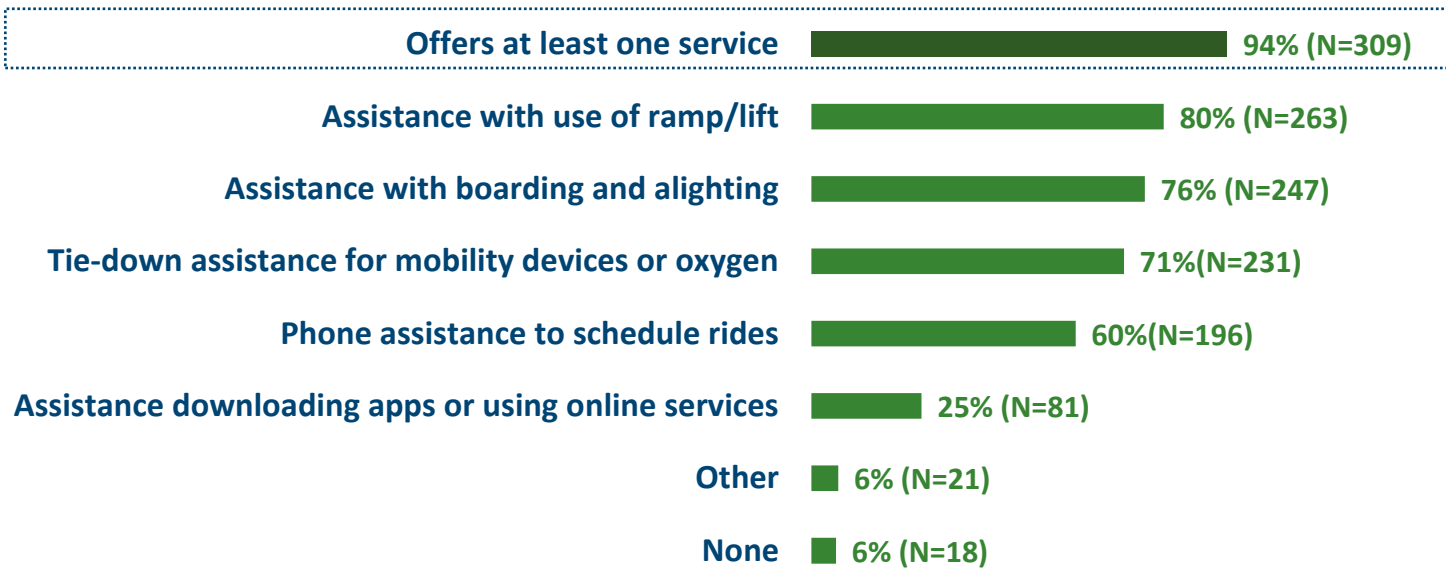
	Direct (N=327)	Related (N=118)
Offers one or more transportation-related service	70% (N=230)	82% (N=97)
Outreach/education on community transportation options	46% (N=150)	58% (N=68)
Mobility management	31% (N=103)	38% (N=45)
Travel training	24% (N=77)	26% (N=31)
Companion/escort service	13% (N=44)	14% (N=17)
Dementia-friendly designated services	10% (N=34)	8% (N=9)

Accessibility of Rides

Nearly all Direct Transportation Providers offer rider assistance and have wheelchair-accessible vehicles

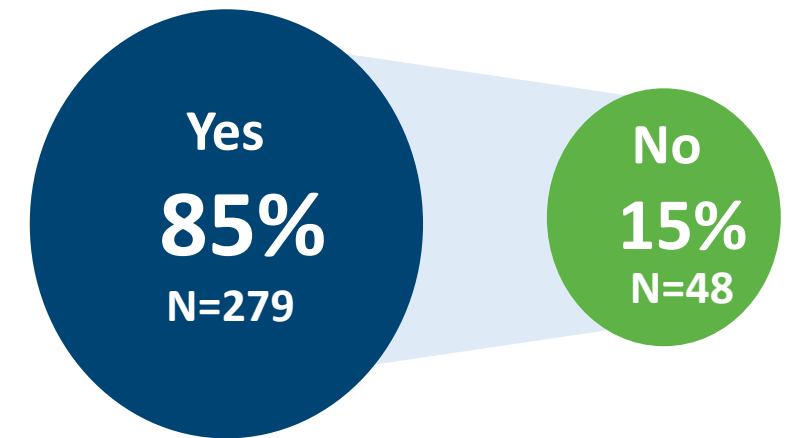
Types of Rider Assistance Services Organizations Offer*

Direct Transportation Providers: N=327



Has Wheelchair Accessible Vehicles

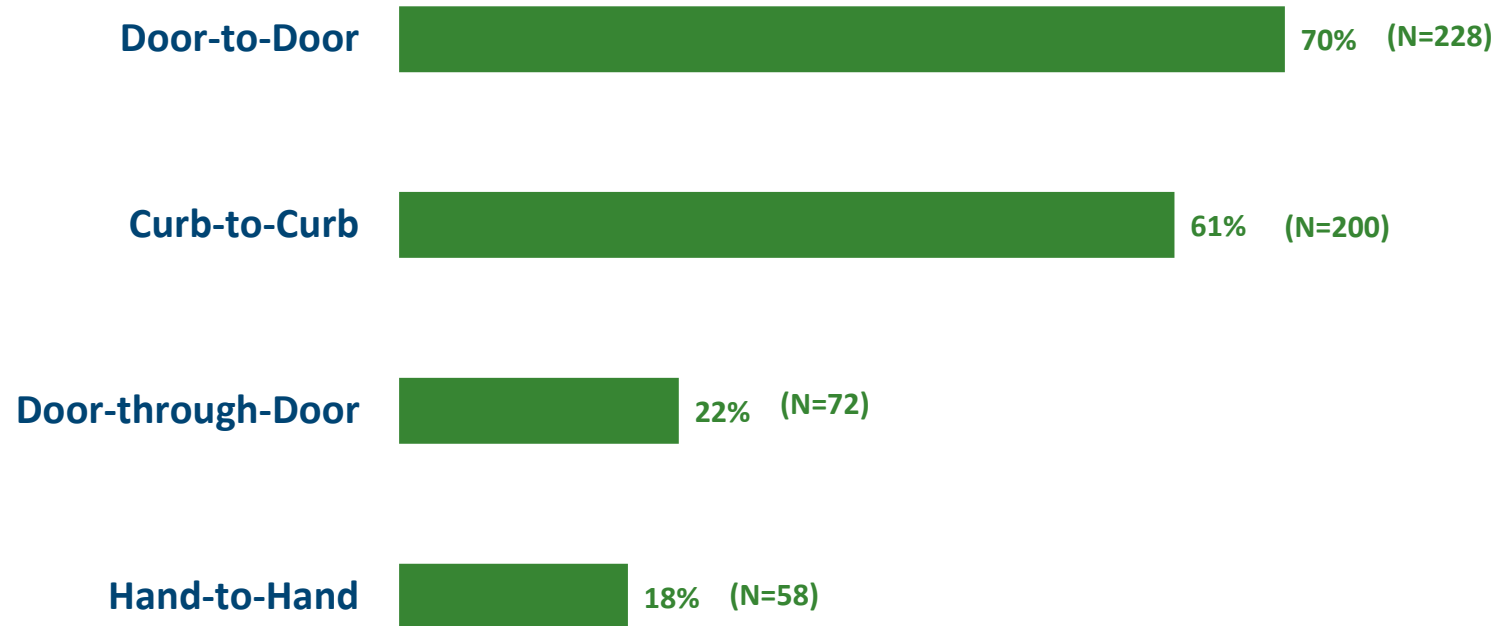
Direct Transportation Providers: N=327



Direct Transportation Providers are most likely to offer door-to-door service followed by curb-to-curb service

Levels of Transportation Services*

Direct Transportation Providers: N=327



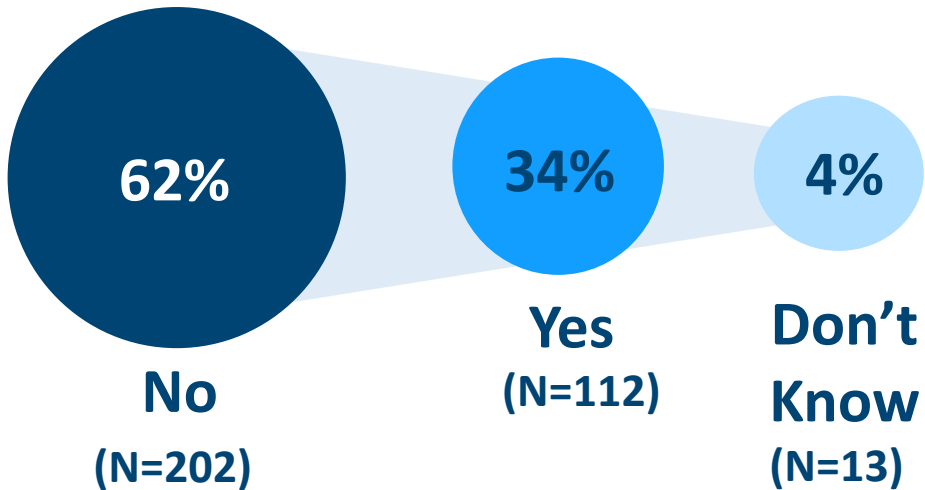
A6: Which level(s) of transportation service do you offer?

* NOTE: Providers may offer multiple types of transportation

A third of Direct Transportation Providers restrict their rides to certain trip purposes, most often to medical appointments

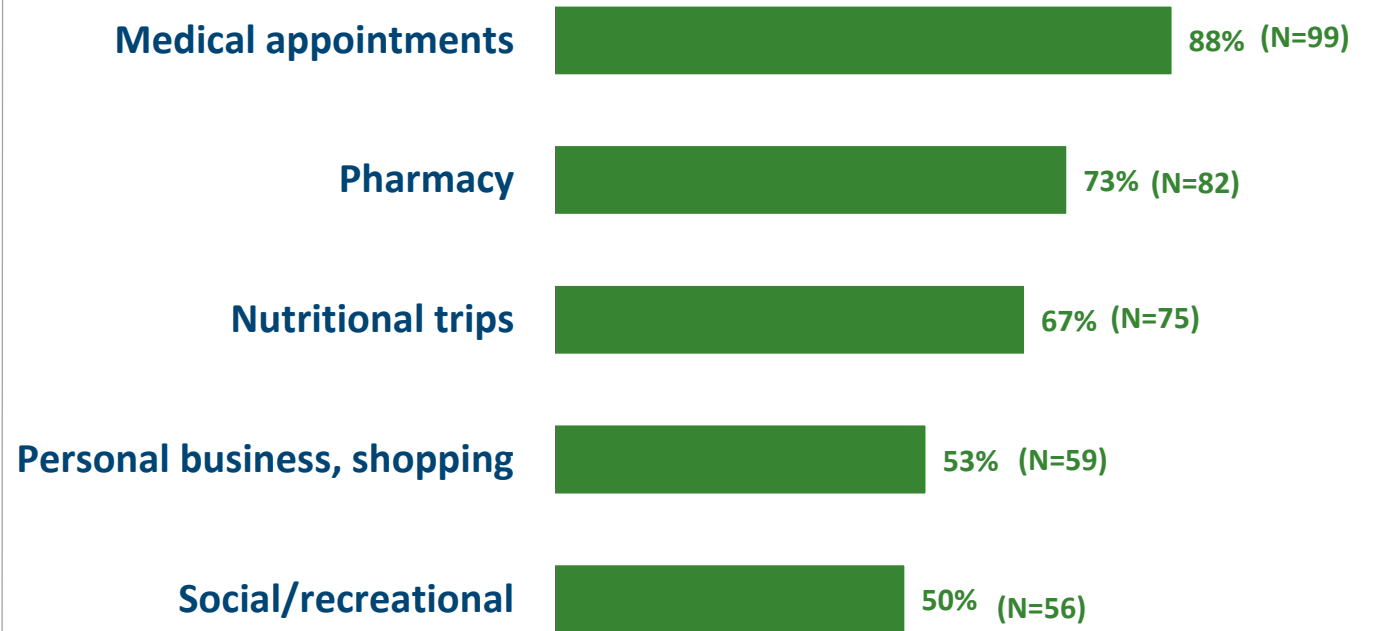
Restricted Rides

Direct Transportation Providers: N=327



Approved Destinations

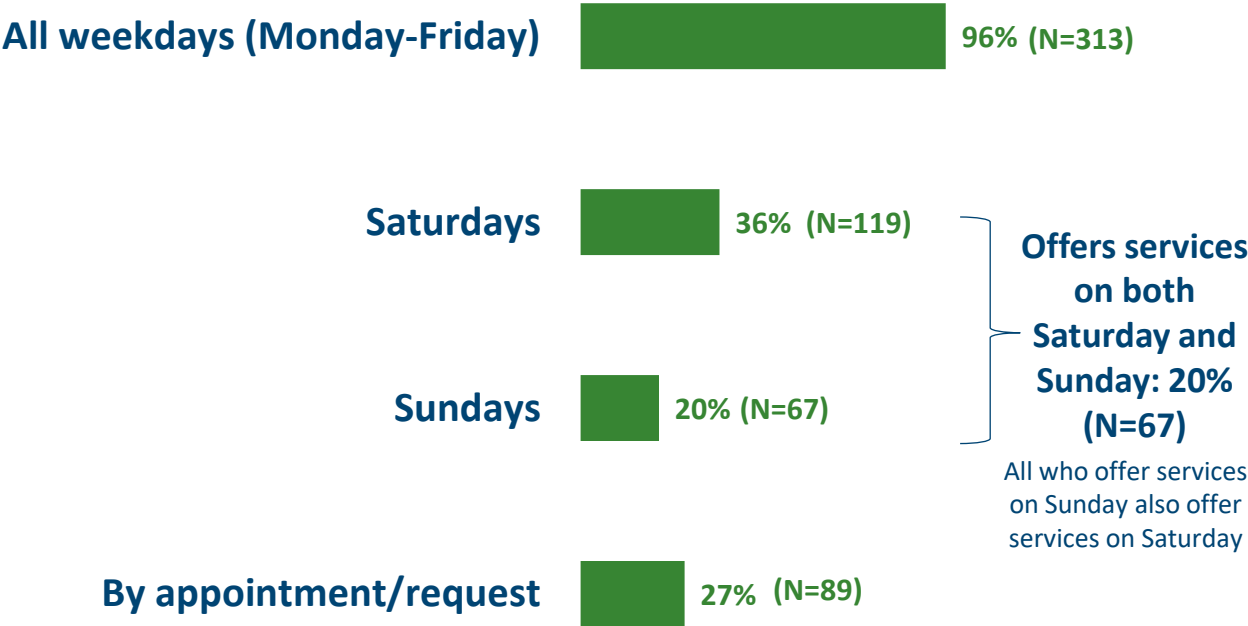
Among Direct Transportation Providers Who Have Restricted Rides: N=112



More than a third of Direct Transportation Providers offer service on Saturdays

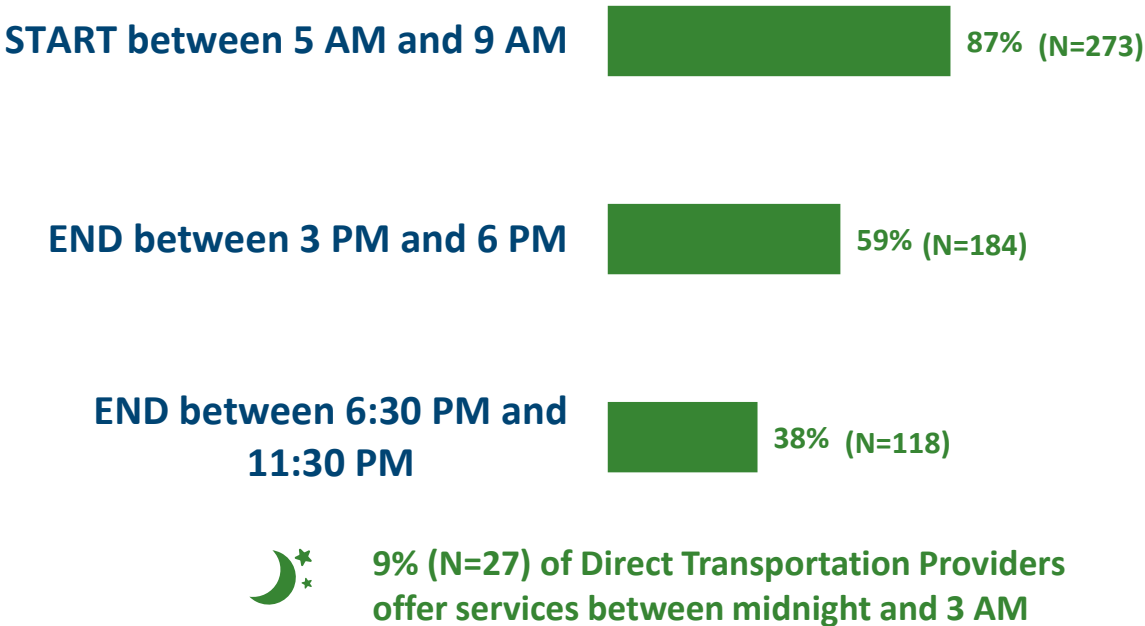
Days Services Are Offered

Direct Transportation Providers: N=327



Weekday Start and End Times

Direct Transportation Providers who serve on weekdays: N=313



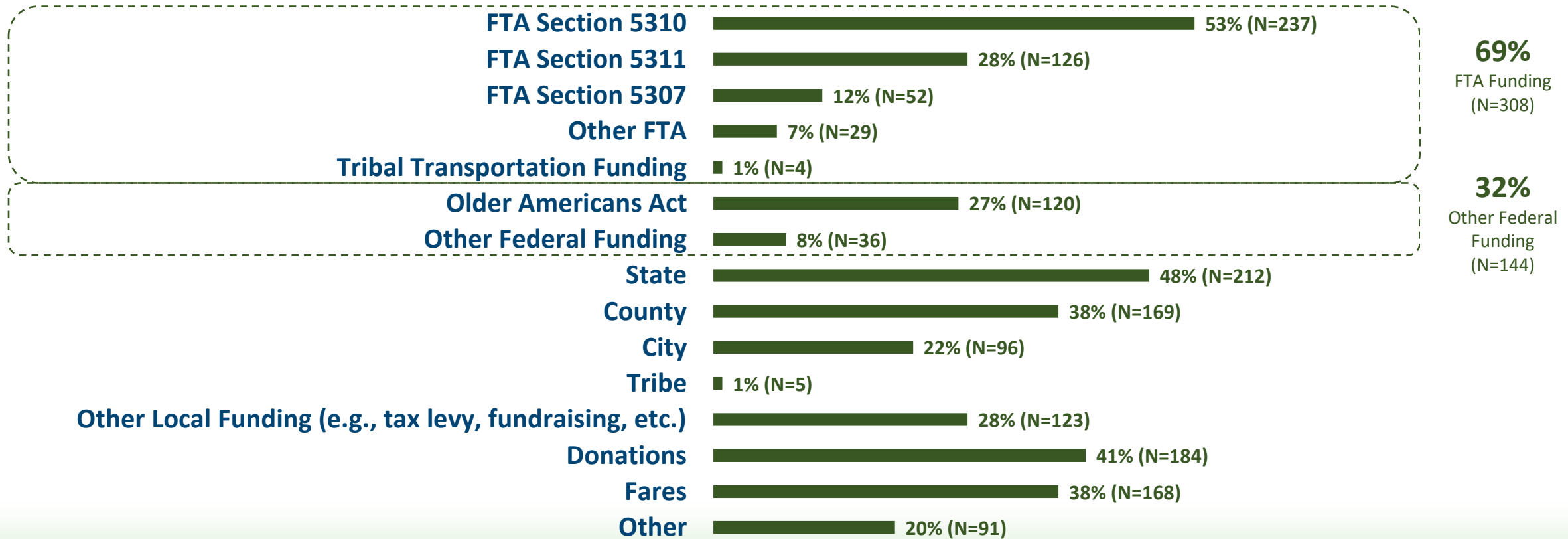
Weekend and by-appointment services follow a similar pattern

Funding

While 69% of respondents receive Federal funds, only about half receive state funding

Funding Sources

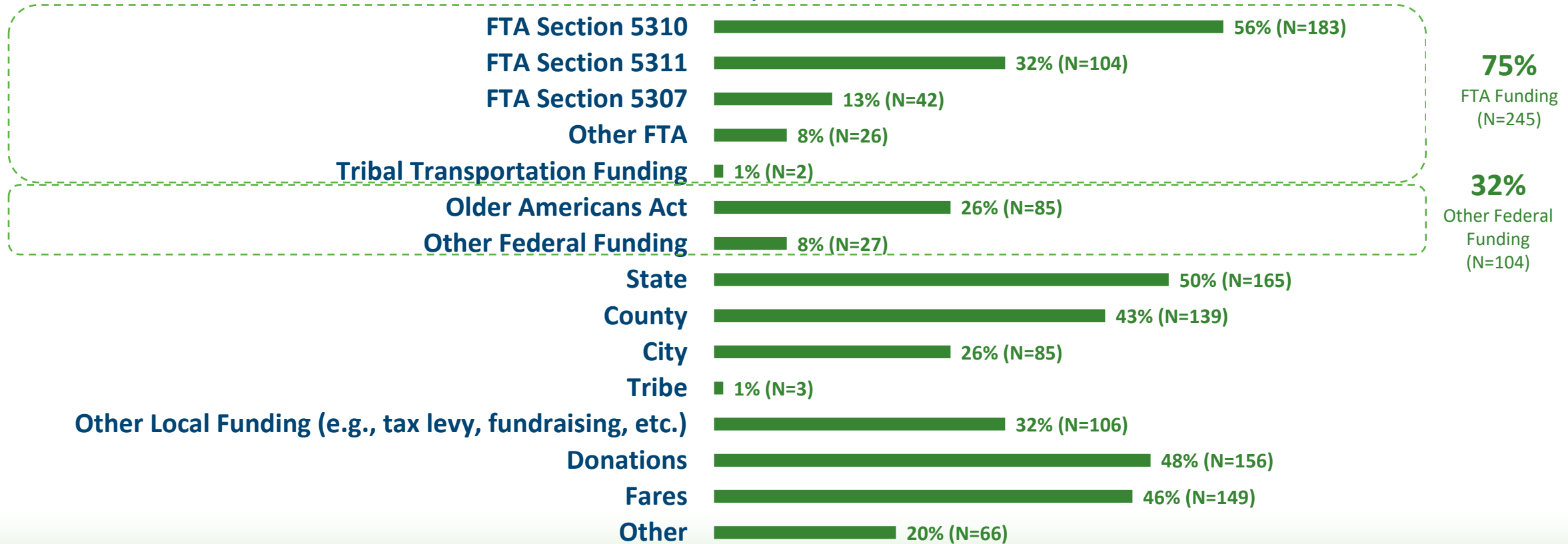
Transportation Service Providers: N=445



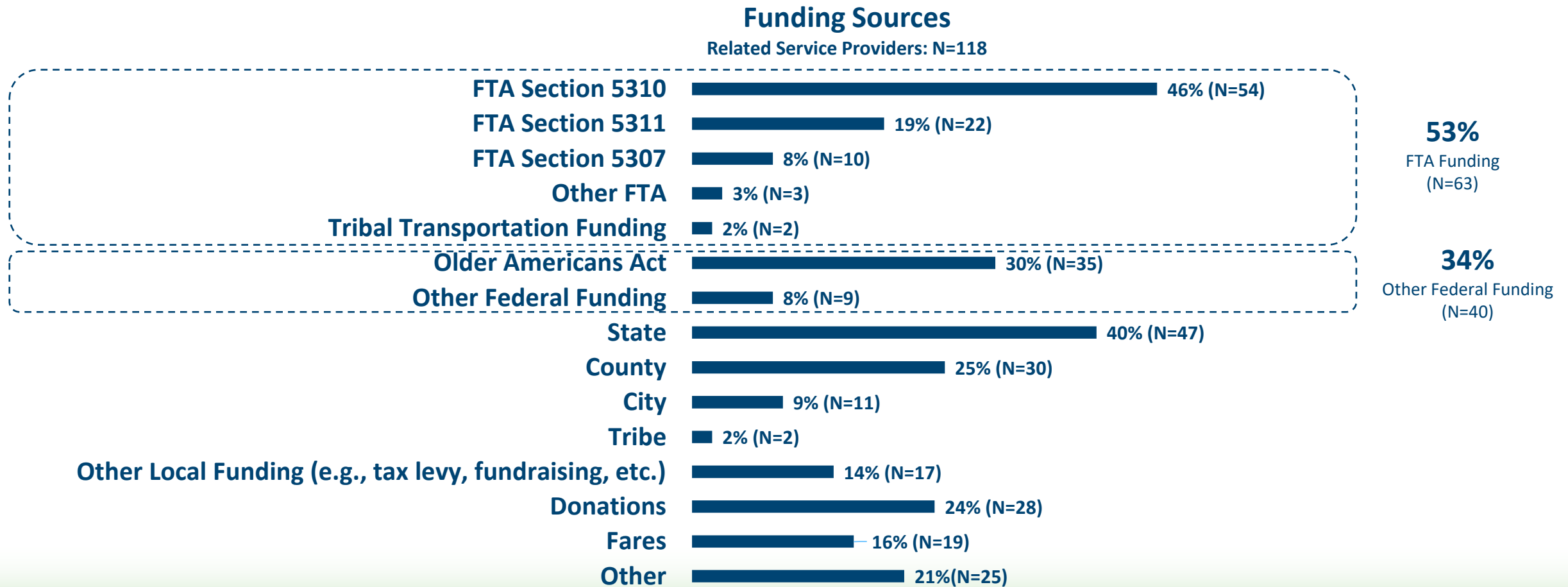
Of Direct Transportation Providers, the most cited funding sources include Section 5310 and state funding along with donations and fares

Funding Sources

Direct Transportation Providers: N=327



Of Related Providers, the top funding sources include Section 5310, state funding, and Older Americans Act funding



Usage of the top 2 funding sources for transportation services is about the same across geographies

Top Funding Sources By Geographical Area

Transportation Service Providers: N=445*

	Urban/Suburban (N=237)	Rural/Frontier (N=336)	Tribal/Other (N=35)
FTA Section 5310	57% (N=134)	55% (N=186)	49% (N=17)
State	48% (N=114)	50% (N=169)	54% (N=19)
Donations	41% (N=97)	44% (N=148)	31% (N=11)
Fares	38% (N=90)	39% (N=130)	34% (N=12)
County	37% (N=87)	41% (N=139)	29% (N=10)

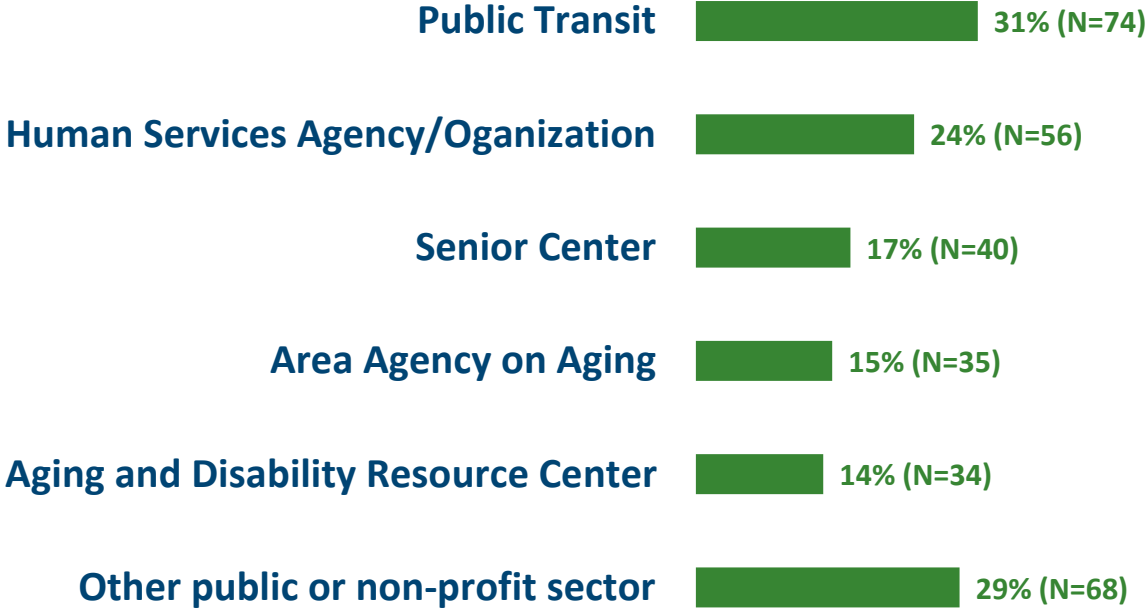
FTA Section 5310 Funding

Enhanced Mobility for Seniors & Individuals with Disabilities

Public Transit and Human Services Agencies are the top organization types that receive Section 5310 funding to support transportation

Type of Company/Agency Among 5310 Funded Organizations



















Receives FTA Section 5310: N=237



Public transit is the top organization type that receives Section 5310 funding in tribal/other areas

Top Organization Types by Geography

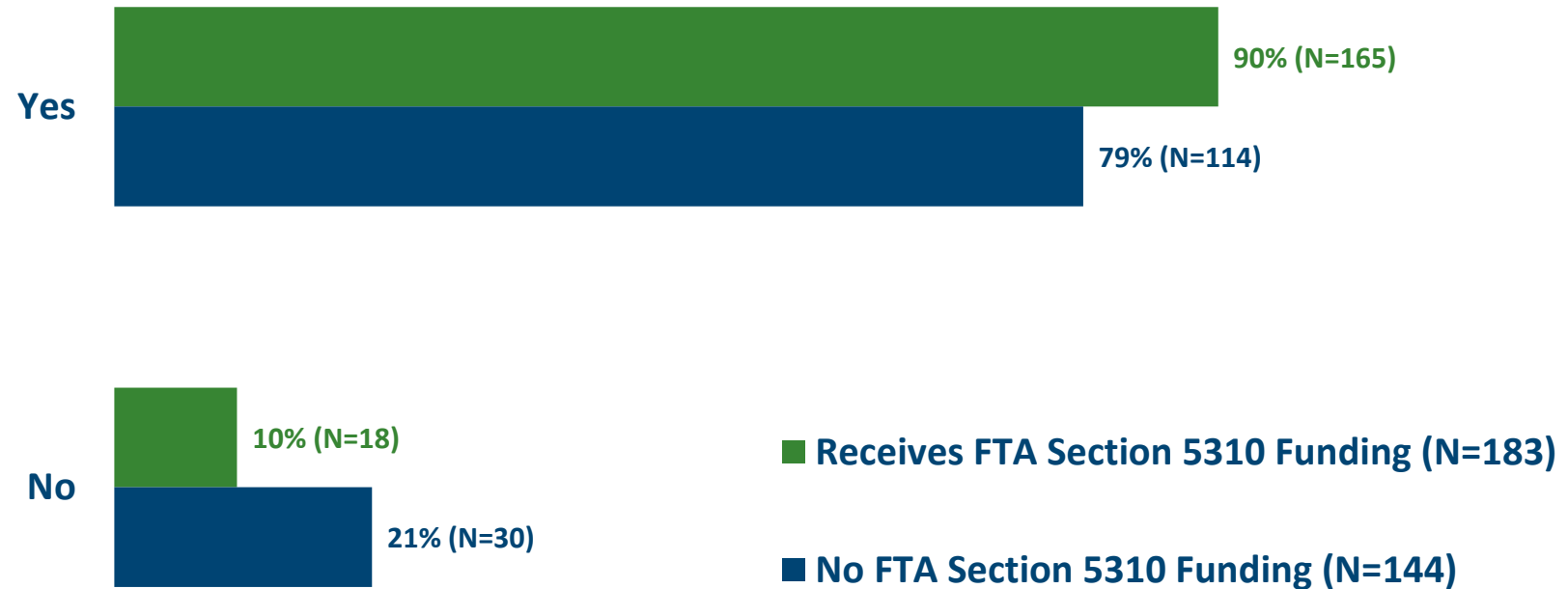
Receives FTA Section 5310: N=237*

	Urban/Suburban (N=134)	Rural/Frontier (N=186)	Tribal/Other (N=17)
Public Transit	 29% (N=39)	 31% (N=58)	 53% (N=9)
Human Services Agency/Organization	 23% (N=31)	 26% (N=48)	 6% (N=1)
Senior Center	 15% (N=20)	 17% (N=31)	 6% (N=1)
Area Agency on Aging	 15% (N=20)	 16% (N=30)	 6% (N=1)
Aging and Disability Resource Center	 14% (N=19)	 16% (N=30)	 6% (N=1)
Other public or non-profit sector	 31% (N=41)	 27% (N=50)	 41% (N=7)

Section 5310-funded Direct Transportation Providers are significantly more likely to have wheelchair-accessible vehicles compared to non-5310 funded providers

Has Wheelchair Accessible Vehicles

Direct Transportation Providers: N=327



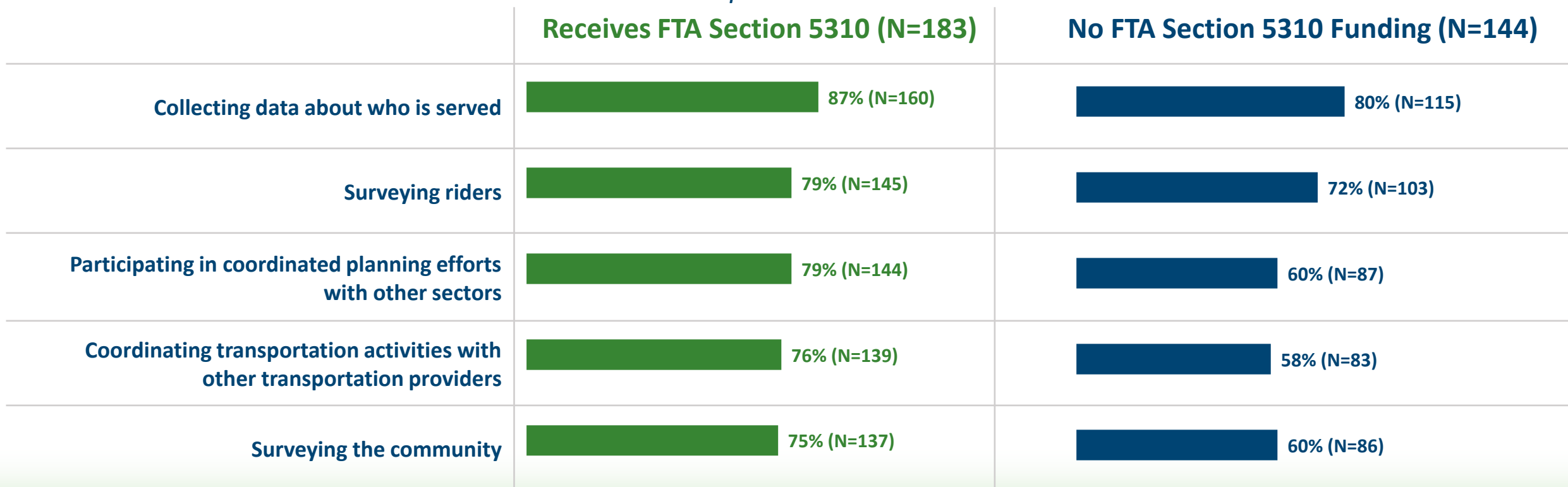
Section 5310-funded Direct Transportation Providers are more likely to participate in a variety of coordination activities

Engagement with Coordination Activities

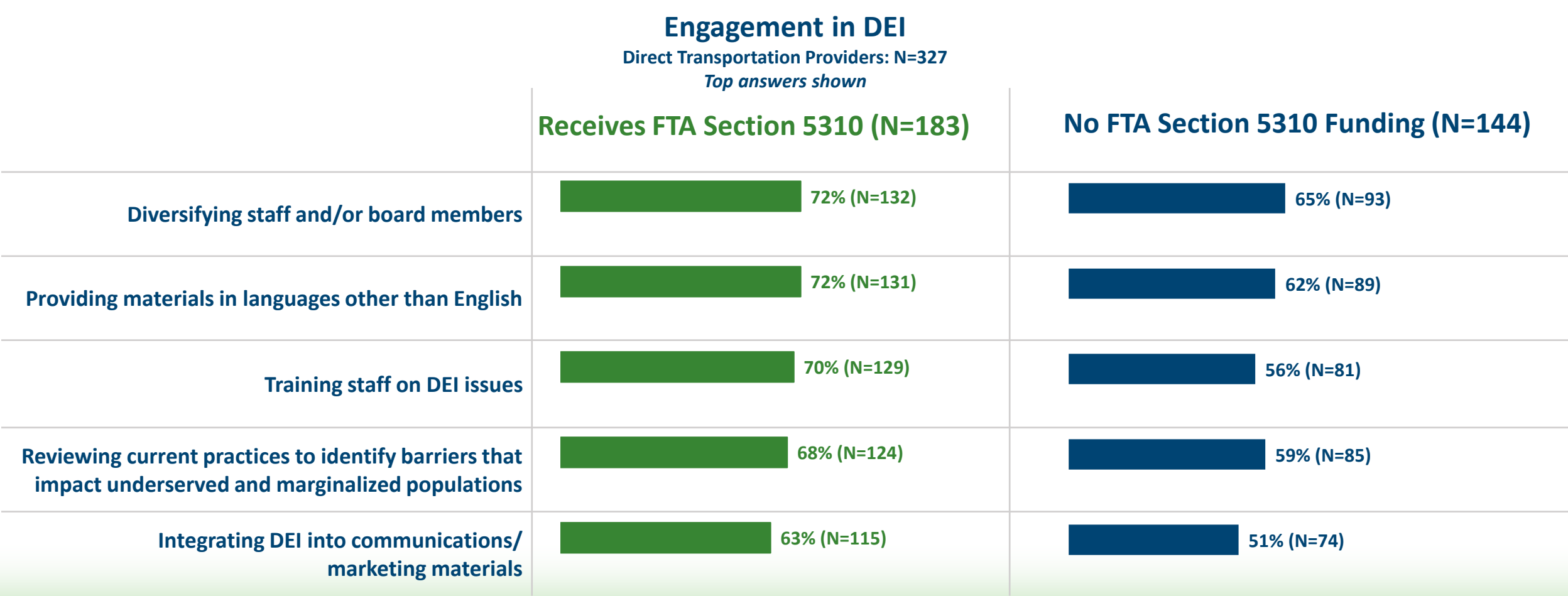
Direct Transportation Providers: N=327

Summary of Engaged

Top answers shown



DEI activities such as training staff and integrating DEI into materials are more common for Section 5310-funded Transportation Providers

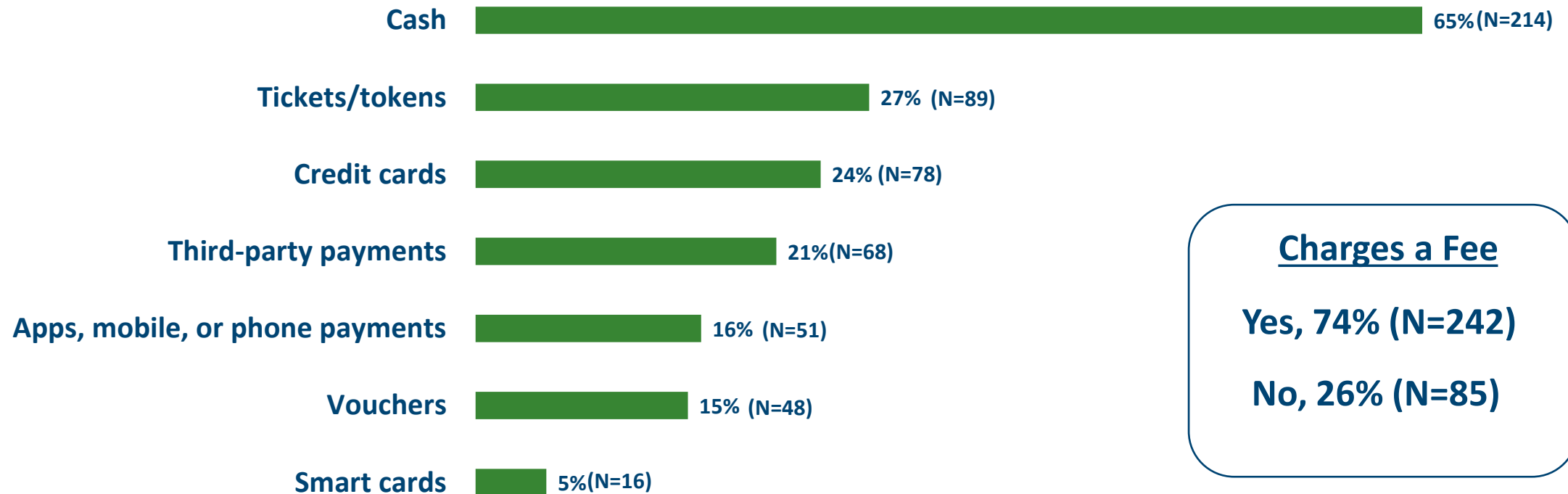


Fares

Most Direct Transportation Providers charge a fee for rides and cash is the top payment method available for riders

Payment Methods Available

Direct Transportation Providers: N=327

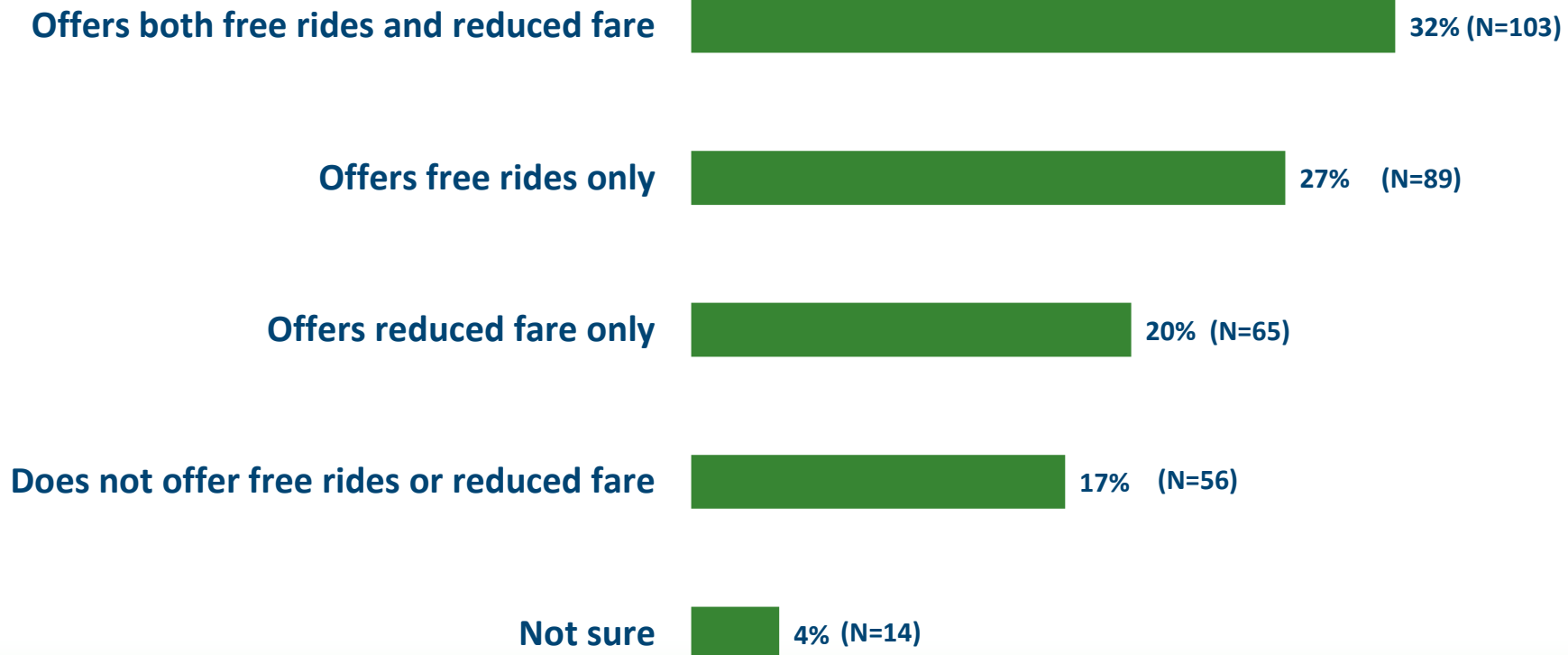


Charges a Fee
Yes, 74% (N=242)
No, 26% (N=85)

Most Direct Transportation Providers offer free or reduced-fare rides

Offer of Free Rides or Reduced-Fare Rides

Direct Transportation Providers: N=327


















Offers free rides AND/OR reduced-fare 79%; N=257

Half of Tribal Direct Transportation Providers offer both free and reduced fare rides

Offer of Free Rides or Reduced-Fare Rides by Geography

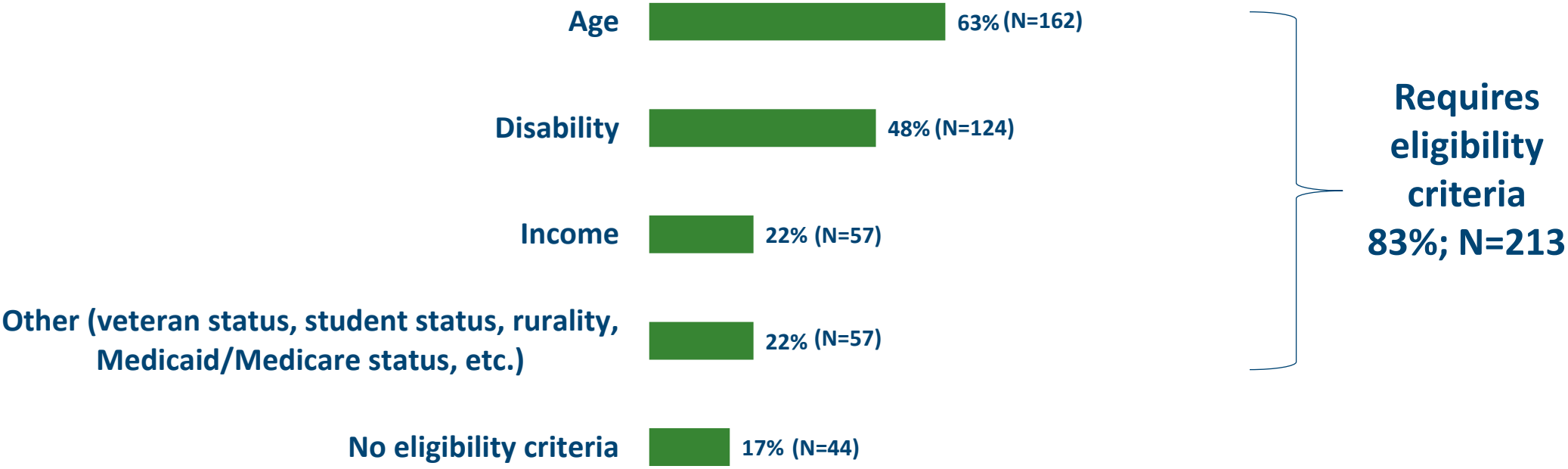
Direct Transportation Providers: N=327

	Urban/Suburban (N=157)	Rural/Frontier (N=250)	Tribal/Other (N=22)
Offers both free rides and reduced fare	 32% (N=50)	 32% (N=79)	 50% (N=11)
Offers free rides only	 28% (N=44)	 28% (N=69)	 27% (N=6)
Offers reduced fare only	 23% (N=36)	 18% (N=44)	 14% (N=3)
Does not offer free rides or reduced fare	 16% (N=25)	 18% (N=46)	 5% (N=1)
Not sure	 1% (N=2)	 4% (N=12)	 4% (N=1)

Among Direct Transportation Providers that offer free and/or reduced-fare rides, age is the top criteria riders must meet to be eligible for that discount

Criteria to be Eligible for Free or Reduced-Fare Rides

Direct Transportation Providers That Offer Free and/or Reduced-Fare Rides: N=257



Challenges and Needs (Direct Transportation Providers)

Staffing is the top challenge with providing transportation services to older adults and people with disabilities

Top Challenges with Providing Transportation Services to Older Adults and People with Disabilities

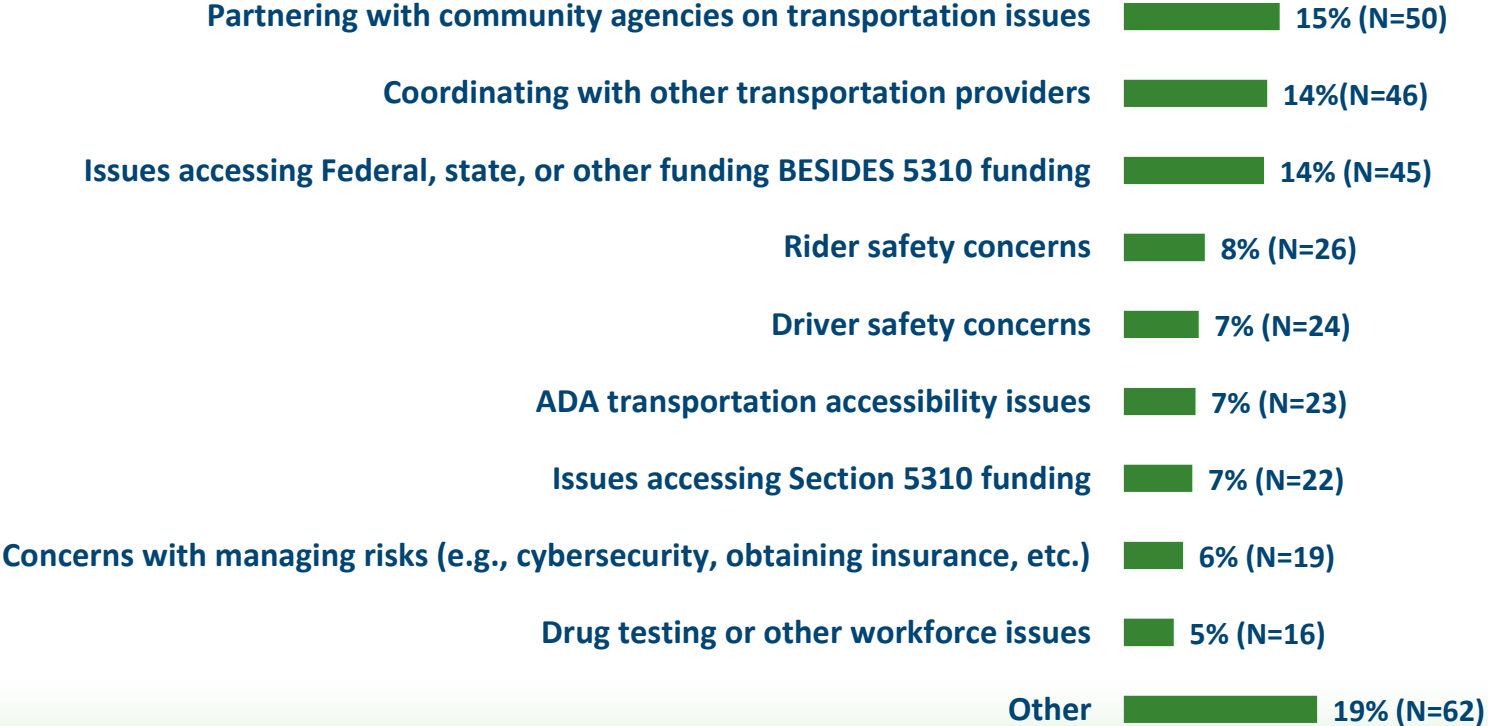
Direct Transportation Providers: N=327



Additional challenges include partnering with community agencies, coordinating with other providers, and accessing funding

Additional Challenges with Providing Transportation Services to Older Adults and People with Disabilities

Direct Transportation Providers: N=327



Top Other mentions include: Insufficient Medicaid/Medicare payment rate, maintenance shop(s) willing to work on ADA vehicles, keeping up with the demands of the population, hiring CDL drivers, vehicle supply chain issues, public awareness of services, and wage increases. It was also noted that it is challenging to provide long-distance rides to healthcare providers and there are often appointment cancellations.

The top challenge among all geographies is hiring staff and staff shortages

Top Challenges by Geography
Direct Transportation Providers: N=327*

	Urban/Suburban (N=157)	Rural/Frontier (N=250)	Tribal/Other (N=22)
Challenges hiring staff/staff shortages	60% (N=94)	63% (N=157)	73% (N=16)
Lack of funding	46% (N=72)	50% (N=126)	68% (N=15)
Lack of vehicles	31% (N=49)	34% (N=86)	32% (N=7)
Recruiting and keeping volunteers	26% (N=41)	30% (N=75)	23% (N=5)
Challenges finding local funding match	20% (N=32)	26% (N=65)	50% (N=11)
Serving rural/tribal areas	16% (N=25)	22% (N=54)	41% (N=9)

In Their Own Words: Challenges & Needs - Funding

Respondents highlight their need for additional funding, emphasizing that the extent of their services is contingent on the amount of funding they can secure.

**“Lack of funding and our County Board to agree to a County Match for federal funding is ALWAYS a barrier for our agency to implement anything new or innovative.”
– Direct Transportation Provider**

**“Our transportation services are in jeopardy due to lack of funding to support higher wages and travel costs. We currently have 3 counties that we cannot find or provide transportation for in our rural region.”
– Direct Transportation Provider**

D1: That is the end of our survey. Is there anything else you would like to communicate to or share with the NADTC?

In Their Own Words: Challenges & Needs – Staffing & Training

Respondents mention that they have encountered challenges related to securing volunteers, getting staff trained, and funding new staff, particularly drivers.

“Insurance companies are making it very difficult to keep and maintain Volunteer drivers for programs like ours. They try to categorize our drivers as Uber or Lyft, or recently, they limited one of my drivers and told him he could only do 2 rides per week for us, or they would drop him because they are saying we are providing commercial transportation services.” – Direct Transportation Provider

**“Would love to see more affordable training options for staff. Most smaller agencies have a very limited training budget - we cannot afford to avail ourselves of the training except on a limited basis.”
– Direct Transportation Provider**






















Initiatives

(Direct Transportation Providers)

Improved dispatch/vehicle tracking technology is the most commonly implemented initiative

Implementation of Initiatives

Direct Transportation Providers: N=327

	Have Implemented	Working/Planning on Implementing	Interested in but No Work/Planning Done
Improved technology for dispatch/vehicle tracking	 39% (N=127)	 22% (N=73)	 16% (N=52)
Improved technology for real-time information sharing with customers	 22% (N=72)	 21% (N=68)	 28% (N=90)
Online or app scheduling for customers	 17% (N=57)	 18% (N=59)	 30% (N=98)
Working with for-profit partners like Transportation Network Companies (Uber, Lyft, etc.) or microtransit providers	 11% (N=37)	 7% (N=23)	 26% (N=84)
Changes in vehicle types & fuels (electric, automated vehicles, alternate fuels)	 10% (N=33)	 19% (N=61)	 33% (N=107)
Automated fare payment systems	 9% (N=30)	 15% (N=48)	 28% (N=90)
Agency consolidations & mergers	 5% (N=17)	 4% (N=13)	 13% (N=42)

In Their Own Words: Initiatives Currently or Planning to Implement – Technology Improvements

Respondents mention tech-related initiatives such as enhancing software to enable text notifications for clients.

“We are looking into implementing new software that will allow for better route planning and real-time client communication.”
– Direct Transportation Provider

“We are slowly wrangling our tech and software into shape in preparation for fee-for-service options. Such options would still be at no cost to the passenger but would allow for streamlined billing for various ride types and funding sources.”
– Direct Transportation Provider

In Their Own Words: Initiatives Currently or Planning to Implement – Strategic Planning

Respondents discuss initiatives in the early stages that are contingent on funding, including evaluating transportation needs to introducing on-demand options.

**“We would like to someday develop an on-demand transportation option.”
– Direct Transportation Provider**

**“We are interested in expanding hours and offering more demand response service. Everything is dependent on financing, including support from local partners.”
– Direct Transportation Provider**

In Their Own Words: Initiatives Currently or Planning to Implement - Partnerships

Respondents highlight their need for additional funding, emphasizing that the extent of their activities is contingent on the amount of funding they can secure.

“RATS created a community-wide consortium with 13 other community organizations and agencies to provide free transportation and meals prepared by local food vendors and served at eight different rural locations for anyone who wants to attend.” – Direct Transportation Provider

“Our staff have been working closely with the Red Cross and Maui United Way to assist displaced kupuna with supportive services. Thanks to our volunteer forces, Na Hoaloha can provide immediate support and kupuna services not offered by other non-profits and without any red tape delays.” – Direct Transportation Provider

Coordination

(Direct Transportation Providers)

Most Direct Transportation Providers are engaged in coordination activities

Coordination Activities

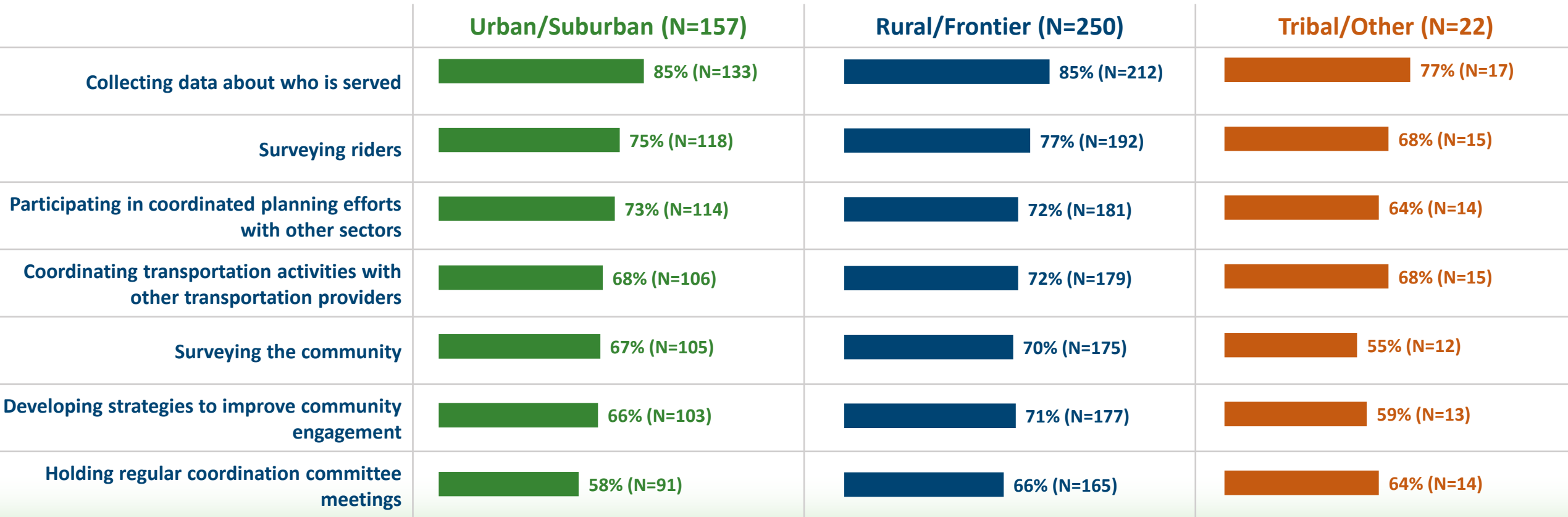
Direct Transportation Providers: N=327



Collecting data about who is served is the top coordination activity across geographies

Top Coordination Activities by Geography

Direct Transportation Providers: N=327



In Their Own Words: Engagement in Coordination Activities – Coordination with Government

Respondents highlight their involvement in collaborating with government programs, including county and state initiatives.

“Ours is a stand-alone volunteer-based service to provide rides to non-procedural medical appointments outside one's home community. We run it independently but do communicate with the county and VA when they may be a better option for the client.”
– Direct Transportation Provider

“We have a Local Advisory Council (LAC) but they only meet once per year. We also are a part of the Regional Coordinated Plan for Transportation Planning for Region 8 in Michigan.” – Direct Transportation Provider

In Their Own Words: Engagement in Coordination Activities – Funding Limitations

Respondents express that funding, especially for vehicles and staff, has hindered their ability to participate in their desired activities.

“We were approved and supposed to receive three 5310 vehicles from VADRPT before 2023 and have been notified we won't receive them until 2025. This delay is significantly impeding our business!” – Direct Transportation Provider

**“We should be pursuing as much coordination as possible to maximize the use of our collective resources. I have encountered some resistance from higher-ups due to the amount of risk it would entail for us, as well as the sheer amount of work-labor hours that we simply do not have within such a small team.”
– Direct Transportation Provider**

In Their Own Words: Engagement in Coordination Activities – Partnerships

Respondents note encountering challenges when attempting to establish partnerships with other agencies to better serve their community.

“Our agency is committed and currently coordinating with two other agencies to assist a rider with transportation. Getting other agencies involved and doing likewise is talked about a lot at our committee meetings but nothing ever seems to happen. When I've tried to set something up, there is always a 'wall' (not enough drivers/van(s) on their end, outside of their business hours, service area).” – Direct Transportation Provider

Diversity, Equity and Inclusion

(Direct Transportation Providers)

Direct Transportation Providers are involved in multiple types of DEI activities

Diversity, Equity, and Inclusion Activities

Direct Transportation Providers: N=327



Engagement in DEI activities is similar among urban, suburban, rural, and frontier areas

Top DEI Activities by Geography

Direct Transportation Providers: N=327*

	Urban/Suburban (N=157)	Rural/Frontier (N=250)	Tribal/Other (N=22)
Diversifying staff and/or board members	73% (N=114)	69% (N=173)	45% (N=10)
Providing materials in languages other than English	71% (N=112)	68% (N=171)	45% (N=10)
Training staff on DEI issues	66% (N=104)	64% (N=161)	41% (N=9)
Integrating DEI into communications/marketing materials	64% (N=100)	58% (N=146)	36% (N=8)
Reviewing current practices to identify barriers that impact underserved and marginalized populations	63% (N=99)	65% (N=162)	50% (N=11)

In Their Own Words: Engagement in DEI – Woven into Strategy

Respondents mention that they integrate DEI initiatives throughout the organization and its overarching strategy.

“Our center recently worked with an agency to develop an Equity Roadmap to improve diversity, equity, and inclusion across all programs and services.”

– Direct Transportation Provider

In Their Own Words: Engagement in DEI – Hiring

Respondents emphasize their commitment to DEI by either hiring dedicated staff or assigning their board the responsibility of ensuring the integration of DEI principles into the organization.

“We have a Chief Organizational Equity Officer at our agency. She oversees the entire agency, including Independence Express. Our program serves anyone with a disability in Western New York. Our department and the people we serve are very diverse. As an agency, we identify gaps as a whole, if any.” – Direct Transportation Provider



Call toll-free: 866.983.3222

Email: contact@nadtc.org

Web: <http://www.nadtc.org>

Find us on Facebook, Twitter, YouTube & LinkedIn

