

23 October 2012

Mr Todd Buttsworth
Research Officer
Legislative Assembly
State and Regional Development Committee
Parliament of New South Wales
Macquarie Street
SYDNEY NSW 2000

Dear Mr Buttsworth

Re: Inquiry into inter-regional public transport

Thank you for the transcript of my comments at the recent inquiry into inter-regional public transport.

I have no verbal inaccuracies to correct.

With regard to the 3 items highlighted I advise as follows:

1. The operator comments to BusNSW did not have specific CountryLink rail services identified as possible candidates to be replaced by coaches.
2. A copy of the paper on Improving Personal Mobility Opportunities in Regional Areas and the PowerPoint presentation is attached.
3. A copy of the 8 point plan referred to in my transcript is also attached.

Yours sincerely



Darryl Mellish
Executive Director

DJM.821 : S/X/3

Improving Personal Mobility Opportunities in Regional Areas



**A report to BusVic by
Monash Sustainability Institute**

June 2012

 **MONASH University**

Monash Sustainability Institute


BusVic

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Introduction

1.1 The context

Effective transport systems are a vital foundation of competitive economies and of liveable, inclusive communities, enabling the efficient and safe movement of people and goods that is critical to our quality of life. Our roads, public transport systems, footpaths and cycle ways provide us with opportunities to access family and friends, jobs, recreation, education, health care and the many other activities that contribute to individual and community wellbeing.

In both urban and regional/rural areas, personal transport is heavily reliant on the private car. The Australian capital city public transport (PT) mode share has been growing strongly, and is widely acknowledged as having to continue to grow. However, it still accounts for only about one in ten personal trips in urban Australia. Sydney and Melbourne's shares are higher. In Warrnambool, 7.3% of households don't own a vehicle, slightly higher than the average for Regional Victoria (6.9%) (Corangamite Shire, 2012). In Moyne Shire, only 4.2% of households are without a vehicle, perhaps reflecting the larger geographical area of the shire and the significantly lower levels of PT, hence the unavailability of car ownership.

In regional/rural areas, PT service levels are less, travel distances typically longer and car reliance higher. For those without ready availability of a private vehicle, mobility opportunities can be severely restricted. For example, in comparative metropolitan and regional studies undertaken in Victoria in 2008, Currie and Delbosc (2010) found that:

- regional respondents aged 15 or older travelled an average of 47 kilometres a day, compared to 36 for metropolitan respondents;
- public transport service availability was 5-6 times higher in the metropolitan area than in the regional area studied (the Latrobe Valley), with public transport accounting for a much lower share of regional trips;
- some 24% of regional respondents indicated that there were activities they could not do because of transport problems, compared to 15% in the metropolitan area.

Stanley et al. (2011), working from the same data set, reported a higher level of risk of social exclusion among the regional respondents. Some 45% of metropolitan respondents exhibited none of a possible five social exclusion thresholds¹, this proportion falling to 36% in the regional sample. Nineteen per cent of metropolitan respondents failed two or more exclusion thresholds but this figure rose to 28% in the regional sample. Metropolitan respondents failed an average of 0.89 exclusion thresholds, whereas regional respondents failed an average of 1.03.

Stanley et al. (2011) modelled influences on risk of social exclusion and wellbeing in both the metropolitan and regional settings. The regional model showed that improved mobility (as measured by increased trip making) is significantly associated with a lower risk of social exclusion. This, in turn, leads to improved wellbeing. The model also suggests that regional

¹ These five dimensions of social exclusion are: income, employment, political engagement, participation and social support.

people place a high value on sense of community (higher than city folk) and this high connection with community is where regional people derive much of their life satisfaction, as measured by the Personal Well-being Index. This finding is important in terms of thinking about how to improve regional mobility levels. If there are opportunities to draw on the regional sense of community, this should be utilised.

Using the co-efficient values for trips and household income from the regional model, Stanley et al. produced an implied value of \$A19.40 per additional regional trip, at the regional sample mean household income level of \$A188/day. This demonstrates the significant value of regional mobility enhancements. Higher values are attributable to additional trips by low income people. Similar values were derived for the metropolitan model, providing confidence in the results.

These various data indicate:

- the importance of mobility for social inclusion and wellbeing in regional areas
- the greater difficulties of travelling in regional areas
- the lesser availability of public transport in regional areas
- the high value of additional trip making by those at risk of social exclusion.

Regional groups more likely to be transport disadvantaged and at risk of social exclusion from a mobility origin include young people, older folk, people with a disability, unemployed and those on a low income. The activities they are less able to undertake are most commonly associated with visiting family and friends, engaging in recreation, etc, activities that build social capital, social inclusion and personal wellbeing and thereby reduce future costs associated with exclusion, such as welfare benefits and mental health costs. Public policy initiatives that deliver cost-effective improvements in regional personal mobility are likely to be valuable to both individuals and the community generally. Where the beneficiaries are likely to be at risk of social exclusion, this value is likely to be particularly high, provided mobility solutions are provided cost-effectively.

1.2 Service Availability

In regional areas, there are a number of publicly supported transport opportunities, from regular public transport services (PT) (local and regional) and Community Transport (CT) services to school buses and subsidised taxis. All receive financial support from the State government, with PT, CT and school bus services receiving substantial assistance. Local government also supports some CT. CT also obtains voluntary and philanthropic resources to establish and operate services and benefits from Commonwealth funding under the Home and Community Care program (HACC). State government programs, such as child protection services, which sit in the Department of Human Services, also contribute funding to enable clients to access services.

In Victoria, both PT and CT have grown in recent years, through programs such as *Meeting Our Transport Challenges* and *Transport Connections*. Figure 1.1 characterises rural PT and CT on various dimensions. Both tend to have travellers with a lower income and non-car user groups, the CT passengers being more likely to be aged or have a disability. Personal control is much lower in CT, as a person is usually not able to choose when to travel, nor how frequently they can travel. Where a person has easy mobility, much travel is spontaneous and

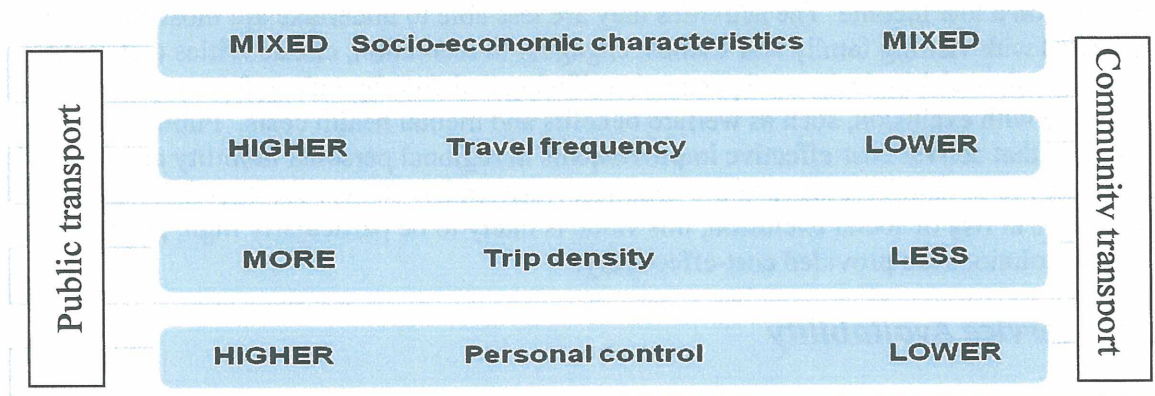
unplanned. This loss of personal control is an unfortunate feature which may be associated with feelings of helplessness, reduction in personal capability and loss of wellbeing.

Tracking down the level of public funding going to PT, CT and school bus services is relatively easy for PT and school bus but very difficult for CT, because of the multiplicity of funding sources and absence of any centralised planning systems for CT. The 2011 Victorian State Budget shows that, in 2011-12:

- regional passenger rail services will receive an estimated \$352m
- regional bus services \$116m.

School bus contracts cost about \$160m, with special school services a further \$50m, the latter encompassing metropolitan and regional services. The Transport Connections Program has an allocation of \$22.8m (over 3 years). Other amounts are provided for schemes such as the Multi-Purpose Taxi Program, Federal HACC funding that is spent on transport, and mobility funds attached to case-management services for a range of people. In short, there is a substantial, but largely unmeasurable, sum already being spent to support regional mobility solutions.

Figure 1.1: Illustrative Characteristics of Rural Public and Community Transport



Regional mobility services are frequently restricted in availability by:

- regulation: e.g. which defines the catchment area for student use of school buses
- institutional restrictions: e.g. limiting carriage of other passengers on school buses; restricting availability of various community transport options to particular client groups, such as people with certain physical conditions or of certain ages
- provider attitudes: e.g. where some community groups with vehicles are unwilling to make them available to others
- restrictions in use due to funding arrangements.

A particular concern with government funding of regional mobility solutions is that these solutions operate almost entirely in silos. For example, school bus services are almost only used by primary and secondary school students and widening access to others, including TAFE students, is a very difficult process. Eligibility for many CT services is commonly

defined narrowly by age, physical abilities, or other criteria. Perhaps the most extreme example, and certainly the most absurd, of these silos is the requirement in funding guidelines for Transport Connections initiatives that public transport solutions be excluded. This is an incomprehensible exclusion in a jurisdiction where the transport legislation is called the *Transport Integration Act!*

Silos reflect traditional functional administrative frameworks and encourage behaviour which protects territory and self-interest, whereas accessibility/mobility problems arise on a place basis, which cuts across functions. Administrative systems have not adapted adequately. Transport policy failures have led to 'spot' solutions with poorer service outcomes and lower sustainability. Place-based approaches are required. The Transport Connections program has a place face but remains severely constrained by overriding functional silos.

Performance measurement in relation to some regional mobility services is scant. The contracts that govern provision of route and school public transport services set out various performance requirements and (for example) contract termination may be exercised in certain circumstances. However, the restrictive conditions that are imposed on access to school buses are a clear limitation on the potential performance effectiveness of those services.

The Transport Connections Program has been heavily criticised by the Victorian Auditor General for the lack of outcome measurement (and poor co-ordination) (2011). More generally, the relatively low asset utilisation achieved by a number of CT services has been frequently observed (see, for example, Stanley and Stanley 2004).

In recent years, Victorian State Government policies have been increasingly seeking to ensure that all people have access to reasonable mobility opportunities to enable them to participate in society in a comprehensive manner. Government policies are also seeking to maximize value for money in service delivery (as well as ensure services are delivered in a safe manner), in a tight fiscal environment.

It is arguable that there already is a considerable investment by government(s) devoted to regional mobility services but that the effectiveness of this investment is compromised by:

- governance arrangements that impose silo mentalities
- a lack of performance accountability.

It is time to consider new ways of providing regional mobility services, to maximise the public value that is achieved from those services, with a particular focus on efficiently meeting the needs of transport disadvantaged people who are at risk of social exclusion. A key issue, then, is how to improve regional mobility by (1) making better use of existing resources and (2) sourcing additional resources to better meet needs, to enhance social inclusion and improve wellbeing in regional communities and reduce the longer term costs of reduced wellbeing, associated with outcomes such as poor health and fewer job skills.

1.3 The Project

These issues can be effectively explored through a detailed case study. BusVic engaged Monash Sustainability Institute to undertake such an investigation in Warrnambool, building on earlier (2004) work undertaken by the Association in that area. The research was undertaken by the Dr Janet Stanley and Professor John Stanley, who undertook the 2004

study (with Geoff Craige), assisted in this project by Brenda Hampson from Transit South West.

2. Scoping a Possible Case Study

2.1 Warrnambool Area

Warrnambool is located on the coast about 300 kilometers south-west of Melbourne. The City of Warrnambool, a major regional service centre, had a population of over 30,000 at 2006 Census time, with an estimated 34,000 today. It is surrounded by the agriculturally-based Moyne Shire, with a further 15,000+ people. The labour and service catchment of the urban centre of Warrnambool is thus about 50,000 population, or larger for some specialized services (e.g. those requiring hospitalization, specialised medical services or higher education services).

Table 2.1 shows the numbers of Warrnambool/Moyne residents in 2006 in various categories where personal mobility issues might be difficult to meet. The numbers are not additive, because there is some overlap between categories, but they indicate a substantial potential number for whom PT, CT, school bus and other publicly/communally-based mobility options (including taxis) are likely to be important, even if there are one or more cars in the household. Stanley and Stanley (2004), for example, argued that rural young people were probably the most transport disadvantaged in the Warrnambool area. There are significant numbers in this group alone. The numbers aged over 75 are also significant and increasing and there are large numbers of single parent households and multi-person households with none or only one car. In short, this is an area where public/communally organized mobility options are likely to be of significant value, if effectively deployed.

Table 2.1 Some Socio-Economic Descriptors for Warrnambool Area: 2006 Census

Indicator	Warrnambool	Moyne	Total
Population	30,392	15,453	45,845
aged <18	7,777	4,180	12,957
aged 12-17	2,785	1,551	4,336
aged >65	4,616	2,228	6,904
aged >75	2,312	1,124	3,436
Lone parent families with dependent children and family income <\$800pw	671 (~1,825 people)	247 (~427 people)	918 (~2,252 people)
Households with no cars	228	46	274
Households with >2 people and 0/1 car	871	298	1,169
Lone parent families with no cars	596	168	764

Source: ABS Census 2006

The Appendix shows the location of some groups of residents of the City of Warrnambool and those nearby in the Shire of Moyne who may be experiencing social exclusion and transport disadvantage. In these maps, the light grey shade reflects the Victorian average. The older age group (70 plus) (Map 1) have moved into urban Warrnambool and other larger urban centres to improve their accessibility to goods and services and personal contacts. The

areas around Warrnambool have lower than average numbers of people in this age group, consistently between none and less than 9%, the average for Victoria being over 9% to less than 12% of the population.

In contrast, Warrnambool and surrounds have high numbers of sole parent families with children (Map 2), with many collector districts having over 20% of their population in this category. These families have only one income coming into the household, often a low sole parent pension. They may therefore find transport difficult. Sole parents are rarely catered for in CT. The high numbers away from most PT, and the low number of households without a car in the Moyne Shire, suggest that many of these families may be struggling to meet the cost of a vehicle because of a lack of other options. The lower cost of housing in these areas of low accessibility is likely to have governed the choice of their living location. Often this financial sacrifice comes at the price of health and education requirements. Improved transport access would improve the wellbeing of many sole parent families.

Slightly higher numbers of residents who provide unpaid assistance to a person with a disability are found both in urban Warrnambool and in a couple of areas close to Warrnambool in Moyne shire (Map 3). It is likely that those with a disability who live closest to Warrnambool are already receiving some assistance from CT, although the transport needs of their carers is not known.

Some unemployment in the age group 25 to 64 years is present in urban Warrnambool with some present especially nearer Port Fairy (Map 4). However, there are pockets of high youth unemployment in Warrnambool and West of Port Fairy, and moderate levels (over 12% to less than 15%) in three areas close to urban Warrnambool (Map5). Again, this group of people are presently not serviced by CT and would be likely to benefit from transport being more available.

Generally, rental properties are in urban Warrnambool (Map 6), with social housing, which indicates low incomes, being located in the urban centres of Warrnambool, Koroit and Port Fairy (Map 7). This group of people are again not a target of CT at present. This preceding snapshot of potential areas of significant transport disadvantage should be updated as soon as the 2011 Census data is available.

2.2 A Social Enterprise Model

In the light of failures of existing PT, CT and school bus systems to operate in an integrated way, notwithstanding the overarching exhortations of the Victorian *Transport Integration Act*, this study took a different approach. The authors' extensive regional research on mobility opportunities suggests that matching (1) those with mobility needs with (2) potential mobility providers is likely to be most successfully achieved if both sides have a sense of ownership of the problem. The **social enterprise** business model seems to be well suited to this application. The Cameron Government in the UK has shown considerable interest in this business model. Blond (2010), who has explored ideas in this area, argues that the model can address two critical problems that confront public sector service delivery: low productivity and disempowerment. These problems are endemic to much communal transport.

A social enterprise is a business with mainly social objectives whose surpluses are primarily re-invested for those objectives in the business or community². It draws on the entrepreneurial spirit of the business sector, using this for community purposes. This is likely to work well in a region with a strong sense of community and committed community leadership. Warrnambool is such a region.

Following the 2004 BusVic mobility study in Warrnambool (Stanley and Stanley 2004), a multi-stakeholder Regional Accessibility Committee (RAC) was established by interested local stakeholders, to pursue implementation of the recommendations of that study and, more importantly, to provide a point for co-ordination of needs identification for regional mobility services. This initiative has not depended on external funding support but has been regionally conceived, managed and resourced. This regional initiative demonstrates that Warrnambool has the regional leadership to pursue a social enterprise approach to communal transport.

The major focus of this study, then, has been an examination of the scope to develop a social enterprise model for delivery of many personal mobility services in the Warrnambool region.

A social enterprise model in the Warrnambool region should be able to:

- better integrate the range of existing regional mobility opportunities and leverage community development more broadly in the process, to improve social capital and sense of community, reduce social isolation and improve wellbeing
- make better use of existing community mobility resources (e.g. vehicles, drivers, volunteers), capturing synergies across agencies and increasing specialisation and coordination in service planning and delivery, resulting in more efficient and effective client service
- provide more transport options and transport opportunities to a wider range of people, particularly those at risk of social exclusion from mobility origins.

In a regional setting, the objectives for a mobility oriented social enterprise should include:

- improved transport/mobility opportunities for those whose needs are not presently met by mainstream public transport
- better understanding of mobility needs and current options leading to more cost/effective transport arrangements
- create employment/training opportunities for some people and volunteering opportunities for others (e.g. driving, office, website, etc).

Briefly, in the context of the current study, what we have in mind here is the establishment of a specialised mobility service planning and delivery agency that initially manages and, in time, owns the key fixed assets and sources the labour used in delivering many (or even all) community transport services, providing a service for participating agencies, their clients and other at-risk people, including through better integration with, and use of, existing PT route, school services and supported taxi services.

² Some writers on social enterprise get bogged down in definitions. We have not dwelt on definitions in this paper, seeing the key ingredients of a social enterprise approach (for our purposes) as being (1) community purposes, (2) drawing on business skills and (3) re-investment of any surpluses to further the community purposes.

2.3 Initial Soundings

To test the potential for this idea in the Warrnambool region, an extensive consultation program was undertaken. Three broad groups were consulted:

1. those who provide both a client service and a related community transport service
2. those who provide just community transport
3. those who only provide client services, not transport, but where transport is likely to be an important issue in effective client service delivery.

Consultations included 16 individual agency meetings, three Warrnambool Regional Accessibility Committee meetings and several meetings with a group of agencies. Some 57 questionnaires were sent to potential parties, with 23 returns being received. Generally, the response to the idea of better coordination, through a model such as a regional social enterprise, was enthusiastic. Answers to some of the questions are summarised below.

Those consulted were asked if they would be prepared to consider making vehicles available for some time to a community based organisation which arranges community transport for people in this area, if their organisation was a shareholder in this organisation. A few said yes and were enthusiastic about the idea as it would take the transport burden away from the organization. Most people responded with 'maybe', believing it to be a good idea but there would be a need to resolve a couple of issues. These included:

- consultation with Head Office (for branch agencies)
- concerns about availability of vehicles for their clients
- insurance questions (coverage)
- a trial is important to this significant (by size/client numbers) group.

A few responded to this question with a 'no', but their reasons for saying no were often not very different from those who answered 'maybe'. Some points made were:

- "I would be concerned if the car was not available in (small town) as only one car provides little flexibility if it is not in the town"
- "Our vehicle is used every day for residents – sharing is not an option" (but the vehicle is only on the road 9 to 16 hours a week, on average)
- "Too difficult to ensure all drivers would be licensed bus operators"
- "There must be a person (volunteer) from the organisation with our bus" .

The way different responding agencies currently handle transport varies greatly. Some organisations have dedicated staff and/or volunteers to organise transport and devote a great deal of resources (time, physical and emotional) in trying to get people to places. Others simply don't 'buy-in', in that they see people have to work out for themselves how to travel. A major government employment agency did not understand why transport was an issue, yet some clients have mentioned to the researchers that they were told by the agency that there is no point looking for a job until you have your licence!

The mobility needs of certain groups of people are given relatively high priority, such as disability, child protection, family counselling and aged groups. But gaps still exist within such groups. Others are less catered for (e.g. youth, especially rural youth), while others miss

out entirely (e.g. those on a low income getting their child to kindergarten; those not linked in with a welfare service).

Financial arrangements for different agencies can vary substantially with respect to transport. For example, some own their own vehicle, purchased with a government grant, while others fund vehicles from their revenue. Costs per vehicle vary substantially, partly reflecting use but also partly reflecting the detail of accounting practices. Some agencies charge clients a fare, while others do not. Some receive transport funding as a part of case management funding, others don't. These are complications that must be considered in the development of a pilot social enterprise scheme.

There is also wide variability in the use of volunteers and the roles that are performed by volunteers. For example, some agencies use volunteers as drivers, others use them as an accompanying carer. Some make use of the volunteers' own vehicles, others use volunteers to drive agency vehicles. Some pay volunteers for use of their own vehicle but insurance arrangements appear to vary between agencies. There is wide variation in the level of support provided to volunteers between different agencies and a number of agencies report difficulties in scheduling availability of volunteers. A social enterprise model may provide a means of supporting volunteering, to improve mobility and build social capital.

Table 2.2 provides some examples of potential vehicle availability for a mobility social enterprise, if agencies interested in participating were to make current spare vehicle capacity available to the social enterprise. It was rare for vehicles to be used more than half time during the week and use at weekends and evenings was less.

Table 2.2: CT vehicles owned by an agency and their use

Organisation type	Vehicles	Use per week per vehicle
Aged care	1 people mover 1 car	Up to 8 hours
Aged care	1 bus (12 to 25 passengers)	9 to 16 hours
Specialist agency	1 bus (12 to 25 passengers) 2 cars	Up to 8 hours
Disability welfare	1 bus (12 to 25 passengers) 8 cars	17 to 30 hours
Health service	1 people mover	Up to 8 hours
Service organisation	1 bus (12 to 25 passengers) 8 cars	17 to 30 hours
Health service	3 buses (12 to 25 passengers) 4 people movers 2 cars	17 to 30 hours
Service organisation	1 bus (12 to 25 passengers)	17 to 30 hours
Health	1 people mover	Up to 8 hours

Table 2.3 shows examples of the kinds of transport tasks required by agency clients. The scale of the transport task varies considerably and is substantial for some agencies, particularly for medical purposes.

Table 2.3: Examples of current agency transport tasks

No. clients	Service offered	Nos. transport arranged for per week	Purpose of trip
200-400	Health	3-12	Medical
51-100	Vocational and life skills training	100 Activity at organisation 50 to travel out	Medical, shopping, recreational, business, educational
100-200	Residential	10-30	Medical, recreational
400-1,000	Health and support	1-5	Medical, recreational
1,000+	Health	26 Activity at organisation 5 travel out	Medical, shopping, recreational, business
26-50	Health and support	A few times a year	shopping
45	Links, support	45 at organisation 16 travel out	Medical, shopping, recreational,
400-1,000	Welfare	10% of clients use once p.a. 90% less than once p.a.	Medical, shopping, recreational, business
51-100	Health	18	Recreational
51-100	Residential	20	Medical, shopping, recreational, business
51-100	Residential	2 travel out	Medical, shopping, recreational, business
51-100	Residential, health, support	5 travel out	Medical, shopping, recreational, business

Table 2.4 sets out the main reasons why agencies currently provide or arrange transport for clients. The most common reason reflects targeting of community transport to particular sub-groups. All the reasons listed are indicative of transport disadvantage on the part of clients.

Table 2.4: Reason current client transport provided

Reason	No. (N=12)
Age, disability or health prevents driving or use of PT	11
Lack of person to give a lift	9
Lack of public transport	8
Inability to afford other transport (car ownership, PT fares or taxi)	6

Table 2.5 confirms this by suggesting that, if the transport was not provided, most people would not be able to undertake the activity for which transport is provided. Very few were thought likely to be able to drive themselves or use public transport. This again reflects eligibility criteria for transport service. A social enterprise model would seek to broaden the scope of client eligibility but transport disadvantage would remain an integrating theme.

Table 2.5: Most common client outcome if organisation did not provide transport

Outcome	Number (N=13)
They would miss their meeting/service/visit/ appointment/social engagement	11
They would need to get a friend/family to drive them	3
They would have to drive themselves	2
Use PT	2
Other: taxi used, ambulance organised	3

To illustrate the nature of the current transport task for agencies who responded to the survey, transport was provided for between three to 100 people in a typical week to get to the agency for some activity, with an unweighted average of 42. Most agencies travel between one and 20 kilometres to pick people up, but two (of nine) have half of their pick-ups over 20 kilometres away. It is rare for pick-ups to be made along a route, suggesting a personalised service. Interestingly, if they were unable to directly meet their client’s transport needs, some 12 out of 13 who responded indicated they would find another way to assist. This indicates both the importance of mobility and the commitment of those providing the relevant services. Five agencies, for example, suggested that they would ‘unofficially’ go and pick the person up. However, some 12 of 17 agencies who responded said they had clients where they were not able to meet their transport needs, for reasons set out in Table 2.6. These reasons indicate unmet demand in the current system.

Table 2.6: Reasons agencies are unable to meet client transport needs

Reason need not met	Nos. of agencies
Agency doesn’t have capacity to meet their needs	7
Clients don’t meet the eligibility criteria to receive transport	5
A support person was needed and not available	4
Too difficult to transport (lifting involved, medical implications for trip, difficult or unsociable issues)	4
Person too far away	1

In summary, then, this initial scoping survey work and our other research in the Warrnambool area indicates:

- many people who are clients of an agency (as well as those who are not supported by an agency) are currently missing out on transport. The numbers in the latter category are unknown
- there is a common and genuine desire on the part of many service agencies to provide better client mobility options
- there is under-use of many vehicles in community transport applications

- there are various current revenue streams which might be able to be pursued by a mobility focused social enterprise
- some agencies whose clients have mobility requirements have reservations about engagement in a possible social enterprise model, BUT
- there is strong interest in continuing to a social enterprise trial.

3. Case Study Design

3.1 Value Proposition

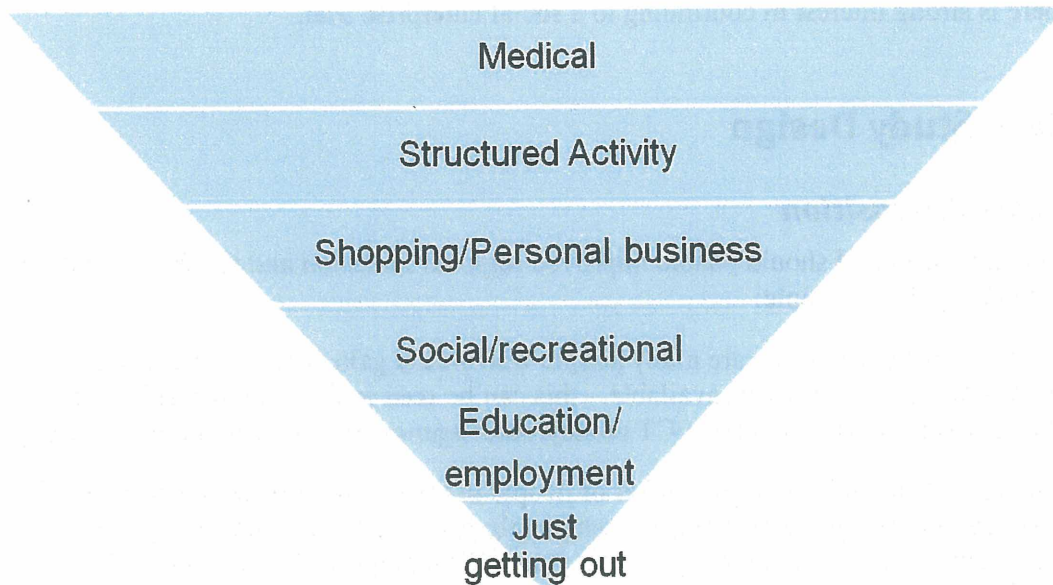
A Social Enterprise model should enable improved regional inclusion and wellbeing, through enhanced mobility. For example:

- It would appear that there are many people who would gain value from getting out more often, if transport was available – this can be seen in the case of residential clients. (Resources: Volunteers/CT money/other agency money used more efficiently)
- There are likely to be a large number of people in the community who would benefit from greater transport availability. Such people may not be known to an agency at present and could independently contact the social enterprise for assistance. This would be especially for recreational/social purposes, often not viewed as a high value activity. (Client payment/volunteer/Transport Connections Program)
- Improving educational transport for youth will expand opportunities – e.g. VET program. (Education Department pay for transport service?).

By combining resources and integrating service provision, a social enterprise model should achieve these improved services, and consequential enhanced wellbeing, more efficiently than current systems.

A social enterprise model provides the opportunity to change the way mobility needs are currently conceived in regional areas, by breaking down silos. This is part of enhancing public value. The current eligibility criteria and resulting resource allocation within CT, according to activity, represents a tacit hierarchy of 'worth'. Figure 3.1 illustrates, in approximate order of descending priority, the kinds of activities that are currently supported by CT. Medical/health type activities are on top. Activities that might build social capital and sense of community, like 'just getting out', are at the bottom. Yet our research has shown that activities like 'just getting out' are important for social inclusion and wellbeing as well as important social determinants of health. They should have similar priority to activities like medical/health activities. Indeed, research on use of a new route bus service showed that the new passengers tended to use the service more frequently for social and leisure purposes than other purposes (Bell et al. 2006). A social enterprise model provides an opportunity to seek such a re-prioritisation, to improve social inclusion and wellbeing.

Figure 3.1: Activities likely to be assisted by community transport, in approximate order of descending priority.



3.2 Transport Integration

A key component of this social enterprise model is that the perverse administrative and governance barriers between transport modes are removed and the needs of the travelling public made the central issue. The present disaggregated system leads to service overlap and gaps; it tacitly divides people into ‘worthy’ (our clients) and ‘unworthy’ (not our problem) people with a travel need. It makes it difficult to understand the true needs of the travelling public as these remain hidden in the complexity. The lack of choice for passengers in the CT system is not a good model for people who may already be feeling excluded. The social enterprise model may not be able to offer a number of alternatives for travel for all people, but it will have a greater chance of doing this than an agency based transport arrangement.

A hidden value of a transport hub (the transport social enterprise’s public face) is that passenger movements and preferences can be better understood. Where these coalesce, with a critical number of people on a continuing basis, then a recommendation could be made that the service be provided by a regular public transport (e.g. route bus) system. This movement through to a regular route service is important as it offers choice, moves people from special purpose ‘exclusionary transport’ to a setting where there is mixing with the general public. The social capital generation of bus travel was found to be present and important for some people in the 2004 Warrnambool transport study. It also offers opportunities for the regular travelling public to use the new service. Where a person needs assistance with travel, a carer could also travel on the PT option, as they would with a CT option. There will, of course, be a few situations where a person cannot travel on a route bus, but these exceptions may be met through a taxi service or in some situations a special bus. The study on new bus services in Pakenham found that people wanted increased accessibility and the ability to participate in activities, along with self-reliance, independence and choice (Bell et al. 2006).

The transport hub should also provide information about travel options for people. Knowing the available options is a continuing need expressed by the community. It would also promote the use of all local travel options by tourists. A transport hub could also make transport connections for people using different modes, and indeed learn about how these connections could be improved. The report on the new bus services found that transport connections were extremely important, one person noting, 'if they have to wait half an hour or whatever then that's when you're going to use the car' (if you have one).

It may be that some of the difficulties around transport are not so much transport problems as problems with the service provision. For example, for youth doing a VCAL course, it would be more accessible to the student if block classes over one whole day were provided, rather than have the youth move between a couple of venues in the one day if long travel distances are involved. Similarly, the time of medical appointments could be arranged giving consideration to the available transport options. The transport hub could undertake this negotiation with frequently used services.

The implication here is that the route bus system could also move towards greater flexibility of service in relation to designated bus stops, demand responsive transport, universal design principles, more effective use of school buses, etc. The PT system, including rail, can offer more in terms of customer service, which, if improved, may attract car drivers to the system, thus supporting a more frequent service for all travelers. Such services could include various multi-media options including internet wireless and an up-graded food service and heating on the long distance trains.

3.3 The Value of Community Transport

The authors of this report note recent work done for the Department of Transport on valuing CT. The authors recognize that CT may be the only travel option for some people who have considerable disability. They also recognize that the present CT system provides a highly valuable service for some people who have no other means of travel, such as some elderly people accessing shops. The valuation report provides a dollar benefit for each of nine dimensions of social, economic and environmental aspects of CT. However, it is suggested that these values be treated with considerable caution due to methodological concerns.

The figures for Victoria are largely extrapolated from two focus groups comprised of CT providers and Department of Transport representatives, of unspecified size and with users notably absent. The information used for the dollar calculations appears to be based on the beliefs of these two groups of people rather than on factual data. Recent work undertaken by one of the authors of this social enterprise report suggests that many of these beliefs are aspirational rather than factual (Stanley and Banks 2012). An audit of transport services in two Victorian rural shires reveals that the availability of CT is extremely limited. One shire covering 4,425 square kilometres has two CT buses which originate from the shire, one of which is used exclusively by one agency. There is one wheelchair taxi in the shire. There are two programs which use private cars to take people to longer distance medical appointments, officially available for a couple days a month, one of which charges for this service. There are also neighbourly people who informally drive people on some occasions to some places.

While it is possible that there are higher levels of CT services in other areas, as indeed is the case with services originating from Warrnambool, the present model of CT is in general very limited, exclusive and priority is given to particular needs.

The expansive statements in the valuation report, at a minimum, do not occur universally in Victoria. Indeed, the authors have confused the value of mobility as such, with the value of CT. Mobility needs can be met in many ways. It could be argued that the best option is a coordinated approach which integrates all transport modes and all travelers, understands and addresses service gaps where possible, provides choice, and offers extra care for the traveler, where this needed.

3.4 Elements of a Business Plan for Mobility Services in the South West

3.4.1 Business Purposes

‘South West Mobility Services’ (or similar name business) will be a ‘not-for-profit’ whose purpose is to provide transport services for regional residents whose needs are not met by present mainstream public transport/taxis. It will also serve as a ‘transport hub’ providing transport information for all the travelling public and serving to monitor need and service gaps. It may also create regional employment/training opportunities for some disadvantaged people and volunteering opportunities for others (e.g. drivers, office staff, website, etc).

It will be run as a social enterprise, owned by shareholders who are either mobility service providers, service user representatives or other ‘financially committed’ regional people. Within limits set by its funding levels, the business will:

- provide transport, gaining synergies by coordinating regional resources. To provide transport, it may own its own vehicles and/or source vehicles from others
- provide personal assistance to people with specific travel needs
- provide an information service to advise regional residents/visitors of regional transport options
- provide volunteering opportunities
- possibly provide job training.

3.4.2 Market Potential

A two year trial is needed to firm up the potential size of the market for mobility services for a regional social enterprise, since there is no prior experience with such a business model in the provision of integrated mobility services in Victoria. The services will target those who are transport disadvantaged, including:

- clients of various health and welfare agencies
- youth, including post-secondary and VCAL students
- older citizens
- people with a disability
- rurally isolated people
- others with particular needs.

However, it will also provide an integrating service with existing PT. 2006 census data provides a rough guide to potential market size in this regard, as shown in the preceding Table 2.1. The various components of potentially ‘at risk’ people in that Table are not additive.

Many of the people in the categories shown will have their own private transport available and others will be able to use regular PT. Others will travel with family/friends or walk/cycle for many trips. However, PT has a limited span of operating hours, limited frequency, family/friends sometimes dislike chauffeuring and walking/cycling are not popular for some people. Many of these attributes are more marked in CT, with the additional issue of exclusivity. An integrated system should go a considerable way to addressing many of these issues. The figures in Table 2.1 suggest a broad potential market for regular PT/CT of perhaps 5,000 people in Warrnambool and Moyne (about one in ten). At an average trip rate of 3 round trips/person/day for all purposes, this means a total of about 1000 trips/person/year, with probably >750/person by motorised means (e.g. cars, PT, CT, taxi, school bus, train). A potential combined PT/CT catchment of about 400,000 return trips results from the conservative assumptions of one trip/day for 5,000 people on one to two days/week.

The current PT boarding rate in the Warrnambool area is about 430,000, which suggests about 215,000 return trips annually (by way of comparison, school bus return trips are about three times this level). Current CT usage is unknown (one of the major problems with CT) but will be small compared to route bus use. However, these broad numbers suggest a potential market of unmet trips amounting to perhaps 150,000 trips/year. This is the broad target market for the social enterprise model. Some of that unmet demand will be best met by additional PT trips and some by making more effective use of spare capacity on school buses. Other trips may be catered for by a growth in services that are like existing CT services. **What is important is meeting a mobility need in the most effective and efficient manner, not the mode per se.**

Trip purposes can be understood as accessing widespread and centralised services (NIEIR, unpublished) and trips for recreational/and social interaction purposes. Widespread services include education, health and welfare, while centralised services relate to those services that a larger urban centre offer, such as a hospital or university. Work undertaken by one of the authors for the Transport Connections Program showed the importance of Warrnambool as a centre for many centralised services for the LGAs of Warrnambool, Moyne and Corangamite. Thus, a social enterprise should consider their role to be:

- assistance with transport for centralised services for the wider region. This will entail commonly infrequent travel for a single person and perhaps a carer, over a longer distance. It will also include those travelling more frequently to access work or a day activity based in Warrnambool.
- access to widespread services over more localised areas. These trips will be more frequent and will include more passengers. The distance would be likely to go beyond the LGA boundary of Warrnambool to include the smaller towns about 30 minutes in travel distance. These towns have little PT and look to Warrnambool as their major base.

Organisations may choose to maintain their existing transport arrangements, perhaps until the value of a social enterprise can be shown. The Transport Hub could hold knowledge about these trips, negotiating to fill spare seats on community transport, where applicable and appropriate. Ideally the Transport Connections Program could also take advantage of this social enterprise system. All means of providing mobility services should form part of a single approach that is co-ordinated through the social enterprise.

The social enterprise marketing strategy needs to include tasks such as:

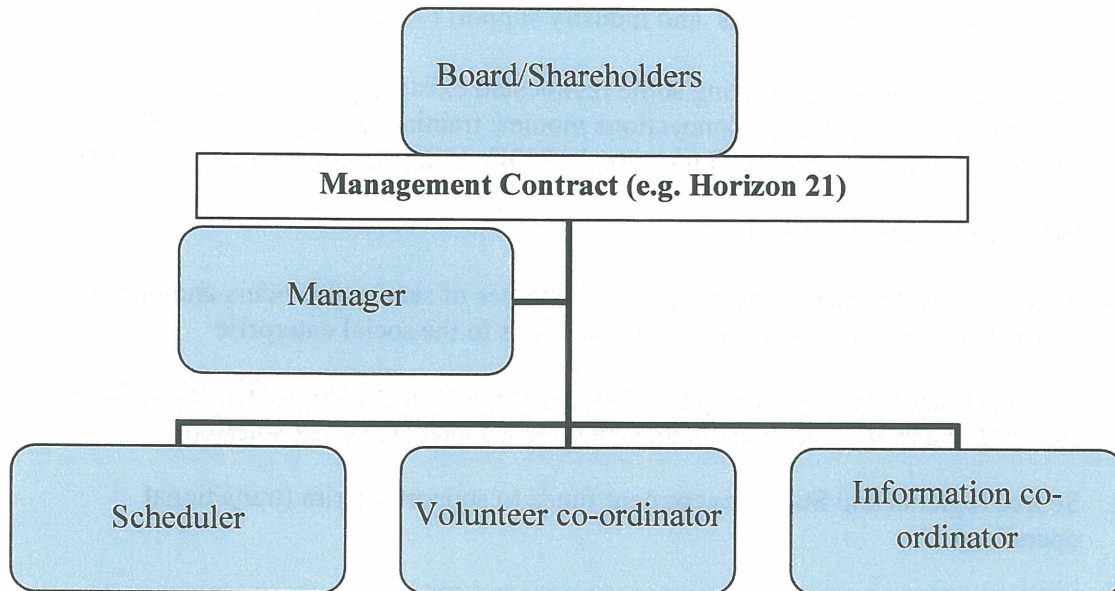
- identify potential participants on both supply (vehicles, drivers, software, etc) and demand sides (client groups)
- engage them in establishing the entity and in identifying potential service users
- identify potential users' travel requirements that might be served, by directly engaging participants, their representative groups, and others, using suitable scheduling software to plan service opportunities
- establish a centralised office presence, website, app, media presence, etc to raise local awareness
- over time, possibly broadening activities to include recognised job training for longer time un-employed people, providing a pool of low impact vehicles such as bikes and gofers and collaborating on the development of walking and bike tracks.

3.4.3 Organisational Design

The social enterprise will need a small organization to perform its roles. This task could be undertaken via a management contract with a suitably skilled local entity. In the South West, this could be a multi-stakeholder regional group such as Horizon 21, which has the networks and skills to undertake the role efficiently and effectively. Organisational arrangements along the lines outlined in Figure 3.2 are envisaged.

The business may initially be set up by agreement between major potential clients, some service providers and a management entity such as Horizon 21. This would be to demonstrate proof-of-concept, via a two year case study. Assuming a successful case study, on-going arrangements would then seek shareholders in the social enterprise, these shareholders being people prepared to commit resources and/or mobility clients to the business. It could thus include some existing CT providers who transfer vehicles wholly or partly into the social enterprise, existing PT providers who might provide accreditation and servicing requirements as well as some vehicle/driver commitments, major welfare agencies who commit to using the social enterprise for their clients' mobility needs, the local council who makes its volunteer network available to work with the social enterprise and others, such as tertiary institutions. The shareholders would select the Board when the entity is established as an on-going business. The Board should include a balance of people with requisite directorial skills and representation of key stakeholder groups.

Figure 3.2: Indicative Organizational Arrangements for Mobility Social Enterprise



3.4.4 Some Financial Aspects for the Case Study Period

In setting up a social enterprise to co-ordinate the regional provision of mobility services to transport disadvantaged people, a financial plan is vital. The two year case study should be undertaken on a bare-bones cost basis but not to the point of risking the success of the exercise. Some cost and revenue issues to be considered are outlined.

Establishment costs

- Software licence (for scheduling software - could be \$40K, unless a more economical source can be found. This may be possible, given the international possibilities from a successful trial. A preliminary discussion has been held with a major international provider of scheduling software, to explore possibilities. This software would not be needed in the first year of the trial, because scale of operations will initially be small. However, it should be relevant in year 2).
- Office equipment (Gifted for the trial?)

Operating costs

- Staffing (~\$160K p.a.)
- Office costs (\$30-40K when on-going)
- Annual software fee (\$10K p.a.) (Not needed at start-up)
- Service marketing (~\$50K)
- Vehicle/driver costs (including fuel, maintenance, insurances) (Costs will depend on level of volunteering, types of vehicles required and method of vehicle supply)
- Advisory and evaluation services
- Training costs?

Revenue (indicative targets to meet annual operating costs and a contribution towards establishment costs)

- Philanthropic trusts/donations and industry support (~\$50,000)
- Local councils (~\$50,000)
- State /Federal Grants (including some reallocated existing government program funding, such as Transport Connections monies; training grants) (~\$150,000)
- User charges at \$2/trip for 400 trips/week~\$40K; some users will not be charged)

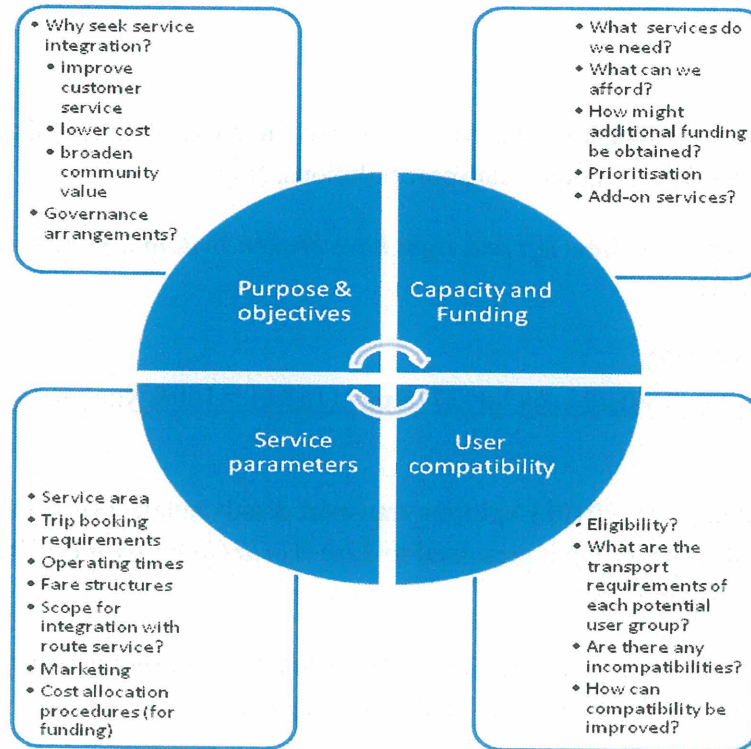
3.4.5 Steps for Establishment

1. Establish Interim Board - comprised of nominees of service providers and clients prepared to commit assets, finance and/or users to the social enterprise
2. Initial establishment assumes primarily loaned vehicles/drivers – while establishing the need and level of regional commitment to a social enterprise solution
3. Source regional and State Government funds to support interim (transitional operation)
4. Establish office presence, recruit key personnel (office, drivers, volunteers, etc).
5. Establish eligibility parameters (see Figure 3.3)
6. Undertake market research to establish interim travel requirements
7. Schedule vehicles and drivers to serve these needs.

Figure 3.3 sets out some of the practical questions that will need to be answered in establishing and running the service. Issues associated with purpose and objectives have been discussed above and capacity/funding matters have also been noted. Service parameter and user compatibility issues are particularly important, since they go to the heart of what the business is about. Aspirations will be modest during the two-year trial case study but should be much larger after that, given the potential scale of unmet demands.

Three points deserve comment. First, it is important to ensure that the social enterprise service does not draw people from existing PT services. The aim, instead, should be the reverse – the social enterprise should encourage people to use existing PT services as far as possible, rather than switch out of PT to a social enterprise service. Second is the issue of whether a fare should be charged? Our view is that if an existing fare is payable for a similar service, then a fare should apply to the social enterprise service. Also, as the social enterprise service will be seeking to expand the market for mobility into new areas of unmet demand, fares may also be relevant where capacity to pay is not a concern for the potential user. We expect that this will frequently be the case. So fares should be charged if the client is able to pay and should be set at modest levels, to avoid discouraging use. Finally, how do you manage expectations of what the service can deliver? The answer is to start small and grow incrementally, demonstrating capacity to deliver.

Figure 3.3: Some Business and Service Planning Considerations



4. Conclusions

There are many unmet mobility needs in regional communities, needs that would improve social inclusion and personal wellbeing if they were met. Current public and community transport services are only meeting some of the needs of regional transport disadvantaged people. School bus services play a vital role in provision of mobility for school children but are hampered in their potential effectiveness by the same problems that beset CT – restrictions on use. Various eligibility criteria serve to impose silo thinking on provision of major forms of regional ‘public’ mobility services and hinder the effective achievement of personal and community wellbeing in the process.

A significant improvement in regional mobility, particularly for transport disadvantaged people, requires breaking through the silo mentality that handicaps delivery and achievement of outcomes. This requires a new business model. This report has argued that a social enterprise business model has the potential to provide the cut-through that is needed. The idea is to effectively devolve much responsibility for (1) prioritization of mobility needs and (2) providing suitable mobility solutions to the regional community, drawing on all the existing resources that are available and augmenting those resources as possible. In most cases the main problem for improving regional mobility is not so much a lack of resources but poor resource use, largely because of various restrictions on eligibility/access to resources/services.

A social enterprise model deserves the opportunity to demonstrate what it can achieve in this regard. The Warrnambool region in South West Victoria has done the ground work to take this step and should be supported by governments and the wider regional community in progressing to a social enterprise delivery model.

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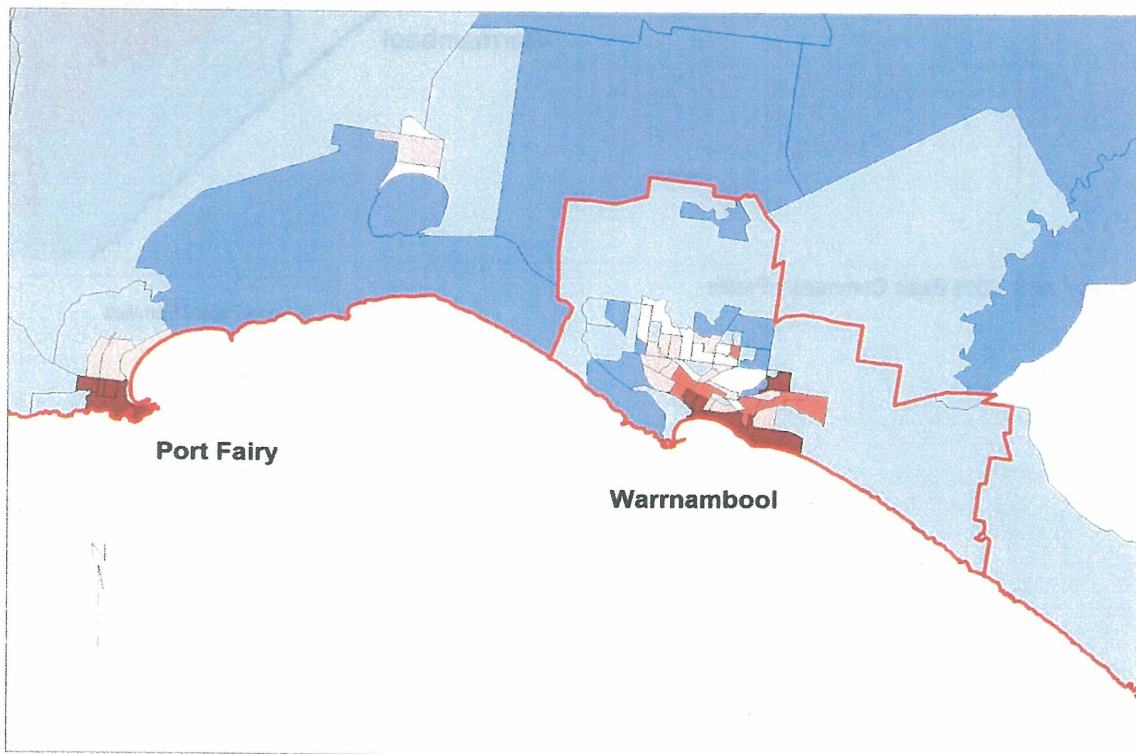
Victorian Auditor-General (2011) *Local Transport Services: the Transport Connections Program*, Victorian Government Printer, Melbourne, March.

Appendix: Maps of those at risk of social exclusion for Warrnambool LGA and surrounds

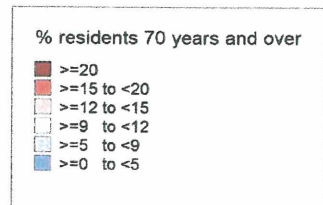
The maps in this Appendix thematically depict selected socio-economic variables for the City of Warrnambool and surrounds. The data is from the Australian Bureau of Statistics 2006 Basic Community Profile. Data was extracted at the collection district (200-300 households) level. All variables are expressed as percentages and the thematic shading used in the mapping is based on the metropolitan average for the respective variables. In all cases the average is depicted by a shade of pale grey.

Map 1

Proportion of residents who are aged 70 years and over, Collection Districts within the Local Government Area of Warrnambool, 2006

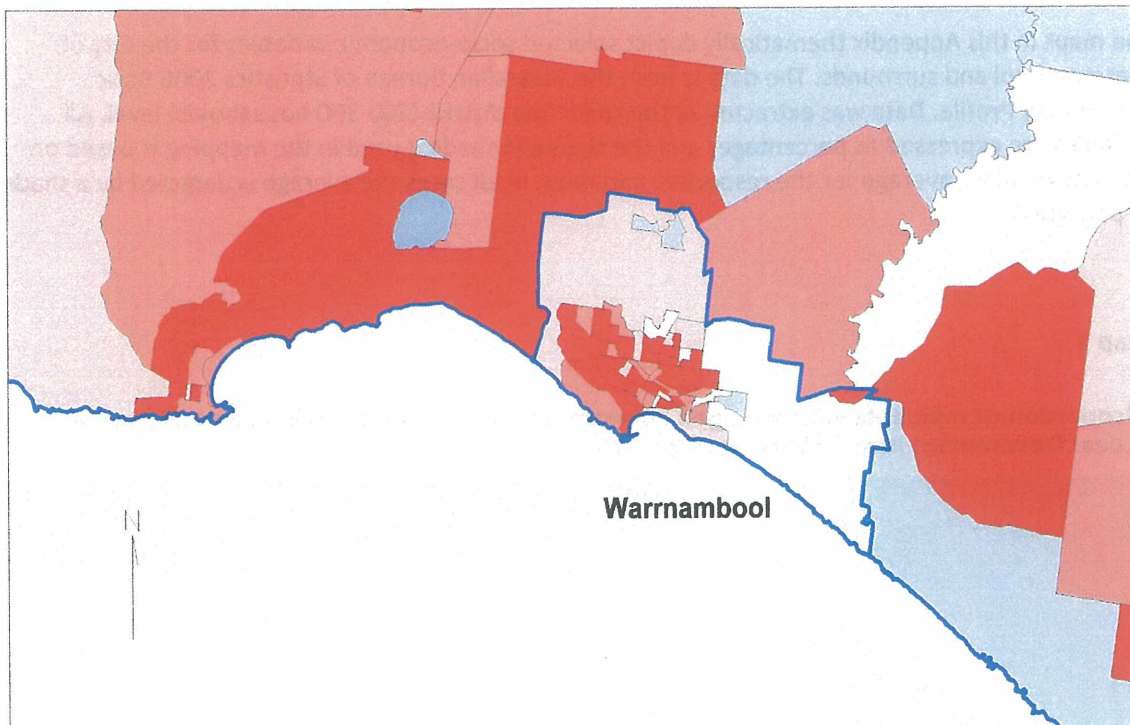


Source: ABS, 2006 Basic Community Profile

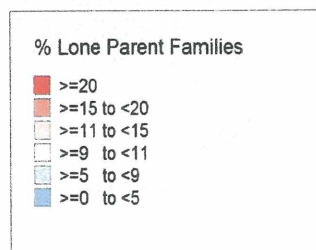


Map 2

Percentage of lone parent families with children with a gross weekly income of less than \$1,000, Collection Districts within the Local Government Area of Warrnambool, 2006

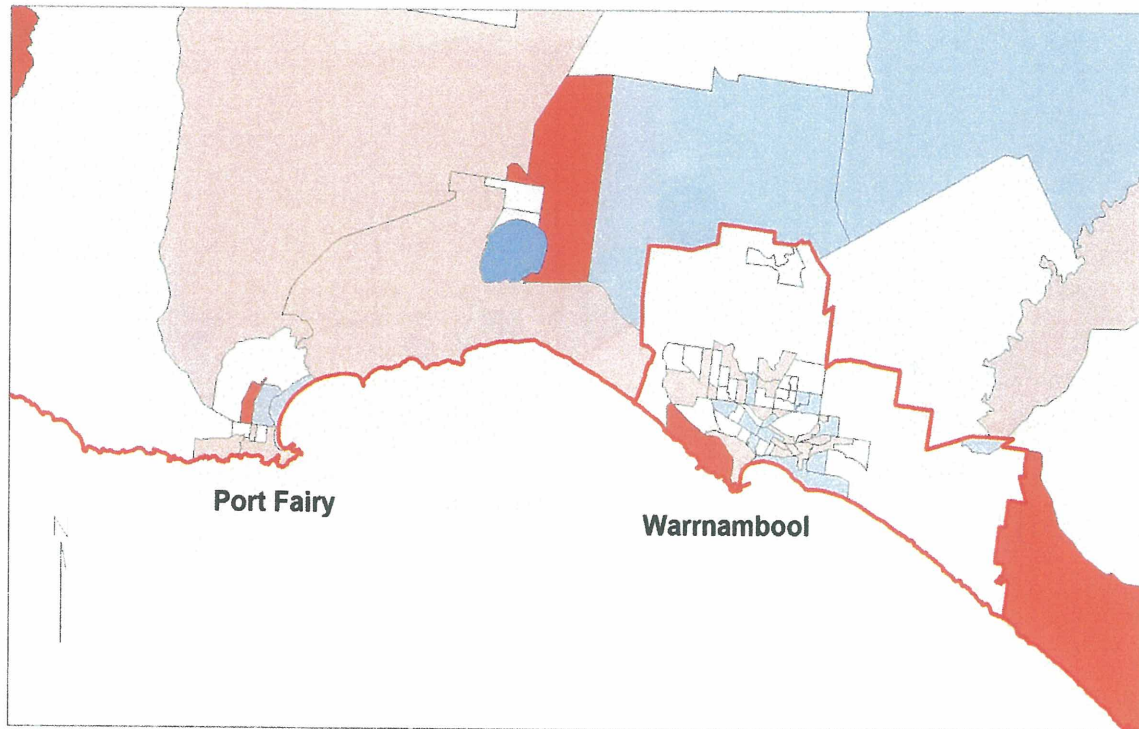


Source: ABS, 2006 Basic Community Profile

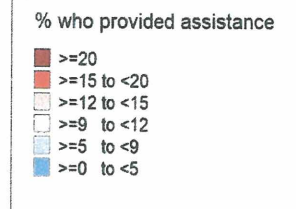


Map 3

Percentage of persons aged 15 years and over who provided unpaid assistance to a person with a disability, Collection Districts within the Local Government Area of Warrnambool, 2006

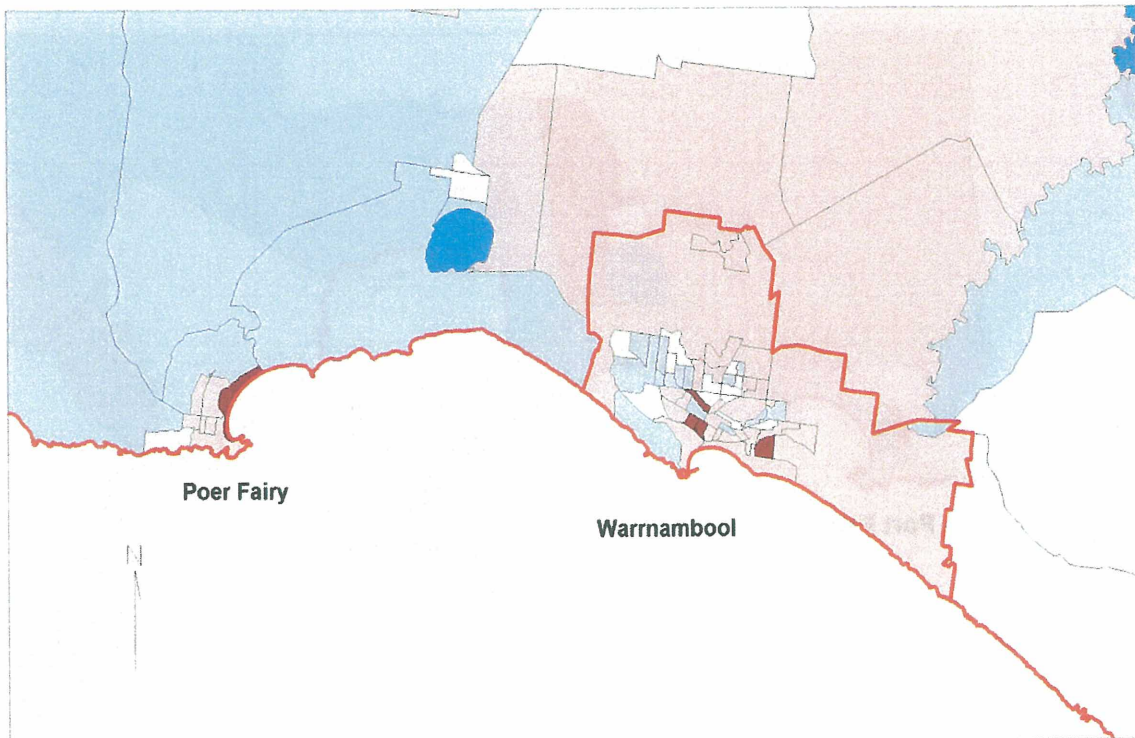


Source: ABS, 2006 Basic Community Profile

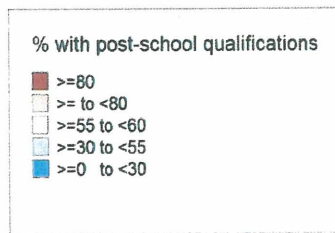


Map 4

Percentage of persons aged 25 to 44 years with post-school qualifications, Collection Districts in the Local Government Area of Warrnambool, 2006

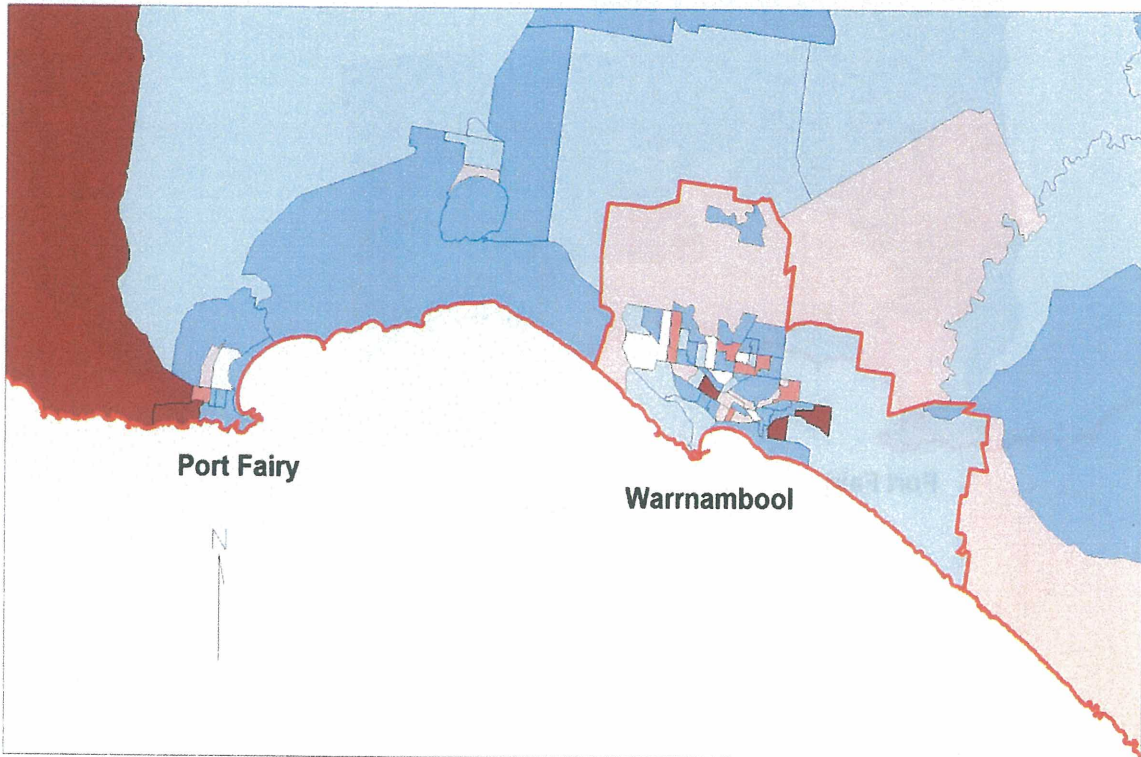


Source: ABS, 2006 Basic Community Profile

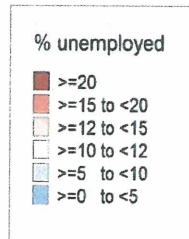


Map 5

Percentage of persons aged 15 to 24 years in the labour force and who are unemployed, Collection Districts within the Local Government Area of Warrnambool, 2006

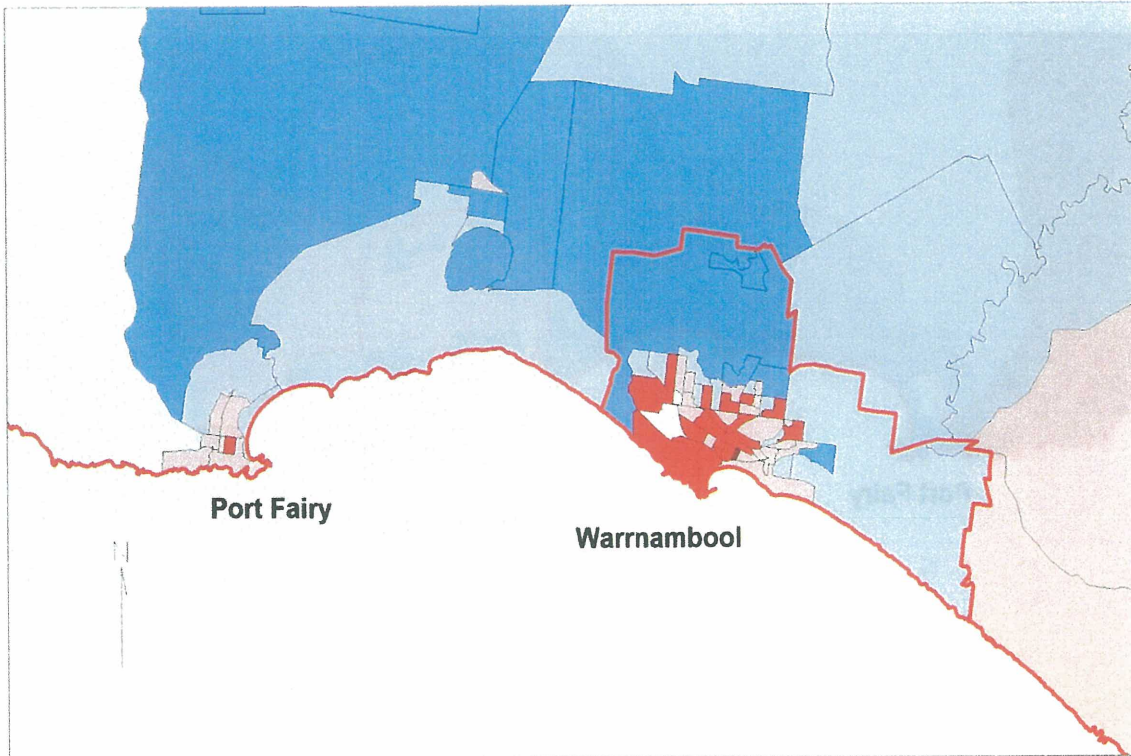


Source: ABS, 2006 Basic community Profile

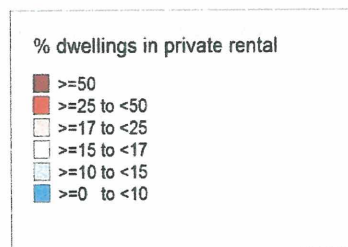


Map 6

Percentage of dwellings that are privately rented*, Collection Districts within the Local government Area of Warrnambool, 2006

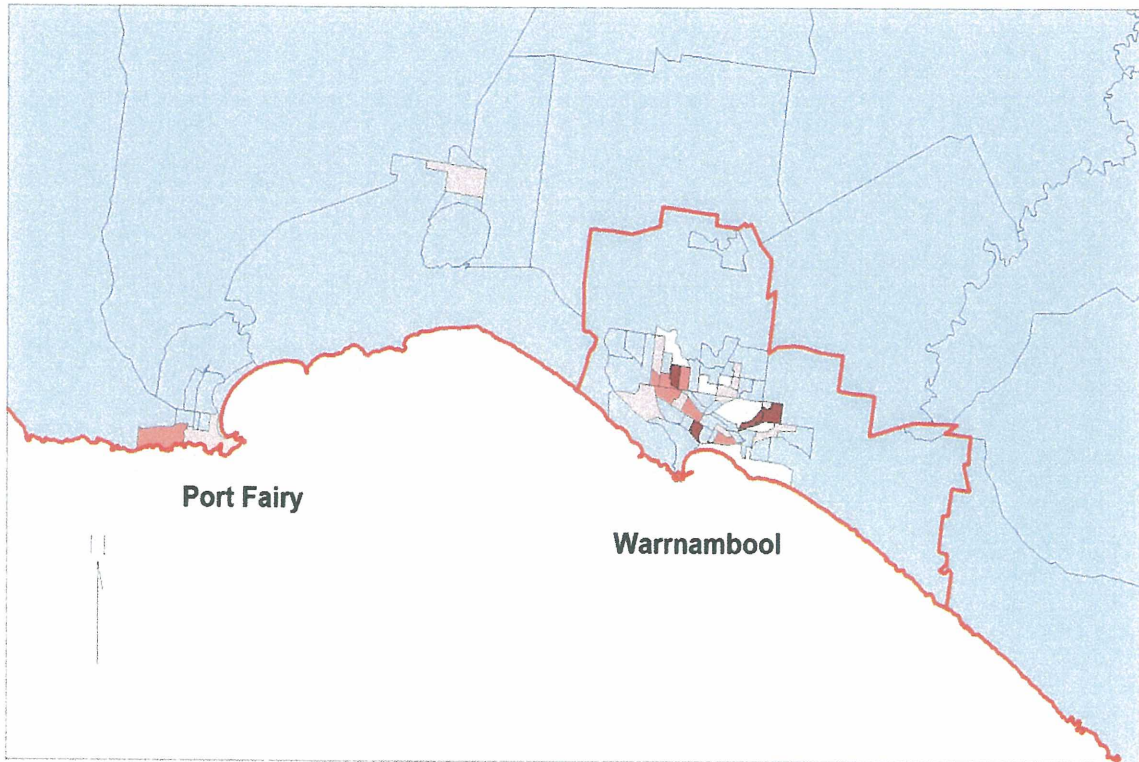


Source: ABS, 2006 Basic Community Profile
* Private rental is comprised of rental through real estate agents and private rental through a realtive etc.

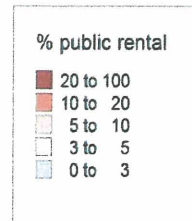


Map 7

**Percentage of dwellings rented through a public housing authority or cooperative,
Collection Districts within the Local Government Area of Warrnambool, 2006**



Source: ABS, 2006 Basic Community Profile



BUS NSW Regional Conference 2012

Improving Personal Mobility in
Regional Areas

Stephen Lucas
Chairman

Sunraysia Buslines

**Sunraysia
Bus Lines**

The logo for Sunraysia Bus Lines features the company name in a bold, blue, sans-serif font. The text is set against a light blue background that includes a stylized graphic of a sun or a starburst, with rays extending outwards.

- Societal Changes
- Regional Accessibility Committee
- CT Structure
- Connect U demonstration Project
- Experience to date and lessons learned

Suntransia
Bus Lines

SOCIETAL CHANGES

- Small Regional and rural towns are being stripped of commercial and government services
- Major towns are growing
- The need for travel to access goods and services is increasing
- Online services are not adequately compensating

**Sunraysia
Bus Lines**

REGIONAL ACCESSIBILITY COMMITTEE

- 5 Local Government Areas
- Facilitated by one Council
- Made up of:
 - Service Providers, State Government, Local Government and User representatives
- Meets Bi monthly
- Aims to match demand with providers and understand the CT space

**Sunraysia
Bus Lines**

RAC Terms of Reference

1. Purpose

The purpose of the Regional Accessibility Committee is to identify transport / accessibility needs and strengthen the regions transport resources.

2. Committee Aim

The Primary aim of the Regional Accessibility Committee is to improve transport options and to disseminate information on those options.

3. Committee Objectives

- Identify (met and unmet) demand for transport in our region
- Link demand to service providers to best meet needs and deliver services.
- Inform communities of transport services options by integrating community and public transport services information into a user friendly resource.
- Create an evaluation and action plan based on research and development exchange.



**Sunraysia
Bus Lines**

The logo for Sunraysia Bus Lines features the company name in a bold, blue, sans-serif font. The text is set against a light blue background that includes a stylized map of the Sunraysia region, with the words 'Sunraysia' and 'Bus Lines' stacked vertically.

RAC Terms of Reference

4. Committee Membership

- Public and Community Transport Service Providers (Warrnambool Taxi's, Warrnambool Bus Lines, V-Line, SW Community Transport Providers).
- Transport users including transport disadvantaged community members
- Bus Association Victoria (BAV)
- Warrnambool City Council
- Moyne Shire Council
- Corangamite Shire Council
- Glenelg Shire Council
- Southern Grampians Shire Council
- South West Community Transport Program
- South West Local Learning and Employment Network (SWLLEN)
- Rural Access
- Department of Infrastructure (DOI)
- Department for Victorian Communities (DVC)
- Warrnambool Liquor Licensing Accord
- Transport Connections Coordinator
- Other Organisations as required.

The logo for Sunraysia Bus Lines features the words "Sunraysia" and "Bus Lines" in a bold, blue, sans-serif font. The text is set against a light blue background that includes a stylized, circular graphic element resembling a sun or a lens flare.

RAC Terms of Reference

5. Term of Appointment

Community members will be encouraged to participate as a member of the Committee with a flexible term of appointment determined by the needs of each member.

6. Meeting Frequency

The committee should meet a minimum five (5) times per year at times (determined by the committee) after taking into consideration the activity required to satisfactorily undertake its determined functions. An annual meeting schedule will be developed and circulated to members.

7. Reporting relationship

Brief records of meetings of the Committee will be available to members two weeks following each meeting and circulated electronically to members.

8. Support from Council

Council will provide a leadership role through facilitating meetings and provision of meeting facilities and information that support the Committees objectives.

**Sunraysia
Bus Lines**

CONNECT U

- 2 Year demonstration project funded by Busvic, BIC and Warrnambool Bus Lines
- Aims to run some and co-ordinate all CT trips so system runs efficiently
- Using social enterprise model
- Currently have MOU's with 4 Service providers with others watching
- Run in conjunction with a research project carried out by Deakin University and Doctor Janet Stanley

Sunraysia
Bus Lines

EXPERIENCE TO DATE AND LESSONS

LEARNT

- Very informal sector
- Operates in silos with no co-ordination
- Varying prices, costs and arrangements
- No connection with traditional PT
- Success of RAC dependent on personalities and trust
- Leadership of Local Government crucial
- A lot of CT not about transport, need to understand market.
- Reduce inefficiencies and better utilise existing funding
- Fund RAC to deliver and co-ordinate

**Sunraysia
Bus Lines**

ACCESS, TOURING & TRANSPORT

BusNSW Priorities / Recommendations – Double Tourism by 2020

INITIATIVES	ACTIONS	IMPEDIMENTS	COMMENTS
<p>Provide a world class Sydney Coach Terminal/Passenger Interchange around Central Railway or alternate location, including suitable management arrangement to promote effective coach operations.</p>	<ul style="list-style-type: none"> • Prepare a cost/benefit report of options addressing the immediate upgrade of existing terminal and the longer term re-development of a new terminal. Report to also include review of the terminal management model to ensure customer experience is optimised. • Re-develop Sydney Coach Terminal and Passenger Interchange. 	<ul style="list-style-type: none"> • Multi jurisdictions involved. • NSW Tourism strategy does not adequately address coach tourism. 	<ul style="list-style-type: none"> • Sydney coach transport infrastructure is well behind the rest of Australia and overseas cities. Currently, safety and the customer experience are being compromised. Significant improvement is required to promote growth in this sector. • Sydney is the major gateway to Australia.
<p>Facilitate efficient coach movements, access and layovers in CBD.</p>	<ul style="list-style-type: none"> • Develop and implement a CBD Coach Strategy that allows effective coach movements and enhances the customer's experience. • Coach transport in the CBD will need to play a key role in doubling overnight visitor expenditure by 2020. 	<ul style="list-style-type: none"> • Various planning initiatives that delay action or overtake the Coach Strategy. • City of Sydney does not appear to recognise the importance of efficient coach movements through the Sydney CBD. 	<ul style="list-style-type: none"> • In October 2009 a draft strategy/discussion paper was prepared, but not finalised. • The paper should be reviewed and updated in line with the Barangaroo development and light rail indicatives. Review should include proper industry consultation, with recommendations implemented.

INITIATIVES	ACTIONS	IMPEDIMENTS	COMMENTS
<p>Promote the benefits of coach travel.</p>	<ul style="list-style-type: none"> Marketing the value add of passengers arriving by coach. Update marketing material. Minister/Destinations NSW should promote Coach Travel via the media. Consideration should be given to a coach based campaign to boost visitor nights in regional areas. Destinations NSW should sponsor and exhibit at the Australian Bus and Coach Show 2013 (owned and managed by BusNSW). Link destination and coach companies. Event marketing should include coach. 	<ul style="list-style-type: none"> Governance structures of tourism agencies that tend to focus on airline and cruise ship industries. Government Executives not recognising the economic, social and environmental benefits of investment in industry partnership. Need Coach Industry Liaison Officer (Employed by BusNSW and funded by State Government). 	<ul style="list-style-type: none"> Coach travel seems to be not on the radar – ie. NSW Tourism Strategy and Visitor Economy Taskforce Terms of Reference.
<p>Make it easier to operate a sustainable coach business.</p>	<ul style="list-style-type: none"> Reduce red tape. Remove cross border anomalies. Review Greenslip costs to sector. Streamline general access process and approve greater use of controlled Access Buses. Approve increase in mass limits. 	<ul style="list-style-type: none"> Government authorities increase rather than decrease red tape. Responsibility in TfNSW/DNSW still not clear (ie. Mass limits). 	<ul style="list-style-type: none"> NHVR reforms, changes to WHS, and DDA are all adding cost without clear productivity benefit to the Coach Sector.

INITIATIVES	ACTIONS	IMPEDIMENTS	COMMENTS
Passenger Interchanges Sydney Airport	<ul style="list-style-type: none"> Enforce only accredited coach operators have access. Improve layover and call up facilities to ensure the customer's transition experience is seamless. 	<ul style="list-style-type: none"> Proposed airport upgrades could delay improvements to passengers/coach interface. 	<ul style="list-style-type: none"> Consultation at Sydney Airport has improved over recent years. Parking marshals should be expressed. Independent Tourism focused concierge should work at all terminals.
Improve customer experience by some simple/low cost solutions.	<ul style="list-style-type: none"> Introduce additional tourist travel products for visitors to Sydney and beyond. Facilitate, Promote and Improve access to information relevant to the tourist's travel needs. 	<ul style="list-style-type: none"> Opal fare strategy not yet developed. Improve marketing and branding of PT information to ensure locals and visitors understand transport options. 	<ul style="list-style-type: none"> It is not clear how ETS/Opal will benefit the tourist. CBD Coach Strategy report should include recommendations to improve marketing and public transport information, including way finding signage.
Improve environment for quality services/operators.	<ul style="list-style-type: none"> Increase enforcement of non-compliance (accreditation). TfNSW/DNSW partner BusNSW on education and training programs, including coach operator seminars. 	<ul style="list-style-type: none"> TfNSW resources/priorities. TfNSW/DNSW seems reluctant to be involved in a partnership approach. 	<ul style="list-style-type: none"> TfNSW do not see this as a priority area. BusNSW offers training and education but needs TfNSW and DNSW for content/gap analysis and funding assistance.
Improve industry consultation and profile.	<ul style="list-style-type: none"> Appoint Coach Sector Liaison Officer to ensure there is a regular line of communication and ongoing development of Coach initiatives between the Coach Sector and TfNSW/DNSW. 		<ul style="list-style-type: none"> Person can be located at BusNSW (employed by BusNSW and funded by State Government). Person would ensure fast and efficient implementations of strategies.

