

INQUIRY INTO NSW TAXI INDUSTRY

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TTF TRANSPORT

Submission to the Inquiry into the NSW Taxi Industry



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Tourism & Transport Forum (TTF)

TTF is a national, Member-funded CEO forum, advocating the public policy interests of the 200 most prestigious corporations and institutions in the Australian transport, property, aviation, tourism and infrastructure sectors.

TTF is the only national multi-modal transport advocacy group in Australia.

TTF is committed to improving the quality of passenger transport across the country. TTF's Members include public transport operators, investors, infrastructure developers, consultants and many others with an interest in improving accessibility to passenger transport in Australia. TTF is working to ensure that people have genuine transport choices that meet their needs, by encouraging the integration of transport and land use planning, infrastructure development and by championing innovative funding solutions.

Introduction

TTF welcomes the opportunity to contribute to the *Inquiry into the NSW taxi industry*. Inefficient and conflicting regulations create a significant cost burden on industry and lead to poor practices. This submission details the major concerns of TTF members.

TTF has been a strong advocate for national reform of the taxi industry. State government authorities across the country have not taken sufficient action to require and enforce minimum service standards. In NSW, this particularly affects disabled members of the community, those without private vehicles and residents in areas with limited access to public transport. These groups often experience long waiting times and / or a poor standard of service.

However, taxis are not only a vital mode of transport for residents but also for tourists. Many international and interstate visitors first view Sydney through the window of a taxi. It is therefore vital that the taxi industry presents a welcoming, professional image. The relationship between the tourism and taxi industry is symbiotic: the taxi industry relies on the health of the tourism market to generate demand, while the tourism industry requires efficient taxi services to provide access to high-quality tourism experiences.

It is critical that NSW has a reliable and efficient taxi system to support business as well as leisure visitation in and around the state. Without the effective operation of the taxi industry, visitors may develop negative perceptions of the destination, limiting the dispersal of expenditure in regional areas, as well as discouraging repeat visitation, all which will negatively affect the local economy.

Last year TTF conducted a survey of 200 CEOs from across Australia to gauge views about the standard of taxi services in major cities. The survey found considerable dissatisfaction and widespread recognition that reform was needed. A copy of the survey results is attached.

Summary of Issues

TTF acknowledges that the NSW government has been working to improve taxi services, including the recent announcement of new annual leasing licences. However, other media reports about entrenched interests in the industry only strengthen the case for more urgent reforms. Of particular concern is the fact that, despite a number of government-commissioned reviews of the industry recommending reform, little action has been taken by the Government.

Some of the key issues with the NSW taxi industry include:

- **Weak customer service focus** – Poor customer service and driver knowledge, English proficiency, uncleanliness, poor availability and reliability continue to be major problems with the taxi industry in Sydney. This is having a detrimental effect on the service provided to residents and on taxi drivers' ability to act as tourism 'ambassadors' for the city.
- **Lack of enforced professional standards** – TTF understands that a majority of taxi companies in Australia are failing to meet the minimum service standards set by the relevant state government authorities. Enforcing these basic requirements should be a priority for state governments, including the NSW government.
- **Lack of competition** – The major taxi companies in NSW have holdings in a vast number of subsidiaries, including fare payment systems. This has resulted in poor service standards, hindered industry innovation, and facilitated general customer dissatisfaction, particularly in urban areas.
- **Licensing costs** – A taxi license in NSW can cost upwards of \$380,000. In 2003 it was \$279,600. This represents a 36 per cent increase in just six years. High licensing costs, coupled with other start-up costs, are a significant barrier to entry for small operators and reduce competition in the industry.
- **Lack of driver entitlements** – Many drivers are not entitled to the types of benefits provided in other industries, such as annual or sick leave. Entitling drivers to such benefits will help transform taxi driving into a viable professional career. Any improvements in wages and benefits should be coupled with improved training and ongoing development for drivers.
- **Safety concerns** – Taxi safety is paramount for both drivers and customers. The NSW Taxi Safety Taskforce identified a range of concerns and made key short and long term recommendations to address them. These recommendations should be implemented without delay.

TTF believes that reform of the NSW taxi industry should include the following goals:

- Improving service standards;
- Expanding the supply of taxis, particularly in peak hour and during changeover;
- Breaking the monopoly on electronic transactions;
- Improving wages and conditions for drivers; and
- Increasing the number of Wheelchair Accessible Taxis.

Service Standards

A majority of taxi companies in Australia are failing to meet the minimum required service standards set by the relevant state government authorities. TTF asserts that to date, state government authorities have not taken sufficient action to enforce minimum service requirements and this is certain to impact negatively on customer service, particularly for those who rely exclusively on taxis for transport, such as the disabled.

Poor customer service and driver knowledge, uncleanliness and poor availability and reliability were cited in a survey on the standards of taxi services in Australian cities¹ as serious and ongoing problems with the taxi industry in NSW. This is having a detrimental effect on the service provided to residents and on taxi drivers' ability to act as tourism 'ambassadors' for the city. An overwhelming 97.4 per cent of survey respondents believed that insufficient training for drivers had impacted negatively on their ability to meet satisfactory service standards.

Insufficient oversight of the industry was one factor contributing to the overall dissatisfaction with taxi services in the survey. 53 per cent of respondents nominated Sydney as their least favourite city to catch a taxi, with 74 per cent insisting taxi services failed or significantly failed to meet satisfactory service expectations. Sydney's taxi service has consistently ranked as the least favourite city among survey respondents.

TTF believes a critical factor in the poor levels of service is the result of a number of service standards being indirectly deferred to taxi networks. These include lost property, driver safety, vehicle tracking and the monitoring of compliance with licensing conditions. This has encouraged drivers to join taxi networks to ensure, among other things, operating conditions, thus entrenching the importance and dominance of the networks in the industry. TTF believes regulation and enforcement should be the role of the government and not undertaken by network operators.

Results from consecutive TTF surveys on taxi service standards suggest that the deference of regulatory responsibilities such as driver training to taxi networks has failed customers in NSW. It is inappropriate for a market participant to have a central role in the regulation of the industry, and the government should install an independent regulatory authority to ensure that customer service requirements in NSW are more adequately met.

Recommendation: Establish an independent regulatory authority to set and enforce driver training and minimum customer service standards.

¹ Tourism & Transport Forum, *Taxi Standards in Australian Cities*, sighted at <http://www.transport.nsw.gov.au/taxireform/>, 20 January 2010.

Competition

Licensing

Restriction of the supply of taxi licences has impacted negatively on customers and drivers, and encouraged anti-competitive behaviour.

Limiting the supply of unrestricted taxi licences in New South Wales has been detrimental in two ways: a steady decline in taxi numbers relative to population growth has forced fewer taxis to service an increasing demand; and the distorted market for taxi licence plates has forced up fares, as taxi operators are required to cover unreasonable costs to lease vehicles.

Taxi licensing costs have increased by 8 per cent in the past year.² The high licence values place upward pressure on operating costs, as most drivers either lease their vehicles, paying weekly rent to plate owners, or are employees of networks. This spiralling cost - as well as other operating costs such as fuel – combined with variable fare takings has significantly narrowed profit margins for drivers, with many struggling to make ends meet.

Restrictions in plate supply has seen the actual value of a Sydney Metropolitan unrestricted taxi licence increase by over 160 per cent between 1990 and 2009.³ The main beneficiaries of this situation have been the owners of NSW taxi plates, who are concentrated within a handful of established commercial operators.

The circumstances of licence supply restriction and licence ownership concentration have given rise to perceptions of a government-sanctioned monopoly in the NSW taxi industry. For the purpose of probity and promotion of competition, the government should explore – as a priority – the reform of the existing taxi licensing regime.

The impending release of new annual licence plates at the market value of \$28,600, or \$550 per week, indicates an awareness of this supply shortage by the NSW Government, however it is doubtful that this alone can stem the flow of unsustainable licence values, and anti-competitive activity.

90 per cent of TTF survey respondents supported reforms to restrictive licensing regimes. Reforms should be aimed at decentralising ownership to encourage a competitive market, and regulating supply relative to population growth and the additional demand generated by tourism.

Recommendation:

- **Expand the supply of taxis, particularly in peak hour and changeover periods; and**
- **Reform the existing taxi licensing regime.**

² NSW Transport & Infrastructure, *Taxi Licensing Changes for New South Wales*,

³ CPI adjusted increase approximately 75% - NSW Transport & Infrastructure

Fare Collections

Significant difficulties are being faced by prospective competitors entering the market for taxi payment systems. Currently, an overwhelming majority of the market is serviced by one operator which charges 10 per cent on every taxi fare to access its EFTPOS facilities. This fee, when compared with similar transactions in restaurants, supermarkets and other retail operations, is exorbitant.

An overwhelming majority (88 per cent) of TTF survey respondents found this transaction surcharge unreasonable.

Anti-competitive activities in the Australian taxi industry regarding payment and metering systems should be addressed via the appropriate legal avenues with due diligence. The supply of taxi meters and EFTPOS terminals at below cost prices by subsidiary companies of the major stakeholders in NSW taxi operations represents a gross contravention of the principles of competition, which the government should enforce without exception.

TTF recognises that proceedings brought by the ACCC are currently before the Federal Court against Cabcharge Australia Limited for alleged breaches of the Trade Practices Act in relation to its conduct in the Australian taxi industry. Any breaches of competition law found by these proceedings should be incorporated into recommendations for reform in NSW.

Recommendation: Promote competition in electronic transactions.

Working Conditions and Entitlements

Driver Entitlements

A major concern is the distinct lack of entitlements for most taxi drivers in NSW, such as annual or sick leave. Currently, most drivers are required to deduct their own GST and leave loading from takings. With rising operating costs and small profit margins, the reality is that taking leave is not a viable option for many drivers.

Allowing drivers these entitlements, by enshrining them into binding employment contracts will transform taxi driving into an attractive professional career. Reforms to the taxi industry should aim to bring drivers' working conditions into line with the standards of the broader transport industry.

Lifting the barriers to taxi ownership posed by the current licensing regime will encourage the establishment of more owner-driver and small fleet operations in the industry. Encouraging small business ownership and competition in the market will dramatically increase service standards for customers and career opportunities for drivers.

Restriction on the type of work undertaken

Current conditions do not encourage taxis to undertake different types of work during off-peak periods, such as delivering community transport and courier-type tasks. This has led to the underutilisation of taxis as a transport asset throughout the entire day and discouraged drivers from innovating for new customer bases.

Restrictive vehicle specifications

While vehicle specifications are necessary to guarantee a certain base quality of vehicle product, current regulation may have hindered innovation in the supply of new products to the market by being overly prescriptive.

Driver Safety

Driver safety is paramount to the quality of working conditions for drivers and service standards for customers. Despite the NSW Taxi Safety Taskforce identifying a range of issues and strategies to address them, concerns about the safety of drivers and passengers remain. The Government should seek to minimise the risk of safety incidents as much as possible and to this effect TTF insists all of the recommendations of the Safety Taskforce be implemented without delay.

Recommendation: Improve driver entitlements and remove restrictions that hinder service innovation.

Government Action

In the last decade, government responses to the recommendations of a number of inquiries of the NSW taxi industry have been inadequate. The preference of the Government for self-regulation has resulted in poorer service standards and further exacerbated public perceptions of a sanctioned monopoly in the industry.

We note that a Ministerial Inquiry into the taxi industry was established in 2004 and tasked specifically with investigating ways to improve taxi services and standards. However, despite the release of an interim report in September 2004, the inquiry did not move beyond the provisional stage.

This lack of action has not gone unnoticed. The Independent Pricing and Regulatory Tribunal (IPART), has highlighted on numerous occasions the need for an inquiry, most recently in a draft report on taxi fares published in 2008:

“IPART is of the view that there would be value in undertaking a full review of the industry that touches upon its structure, its viability and the impact of the regulations imposed.”⁴

TTF recommends a more proactive approach to reform by the Government, that encompasses recommendations from previous reports and inquiries.

Recommendation: The Government take a proactive approach to industry reform.

⁴ Independent Pricing and Regulatory Tribunal, *2008 Review of Taxi Fares in NSW*, p12.

Wheelchair Accessible Taxis (WATs)

TTF also supports a review of the subsidy scheme for the use of wheelchair accessible taxis. In order for the Government to fulfill its requirements under disability laws, the 50 per cent fare concession capped at \$30 should be reviewed. It falls well below the standards set in other jurisdictions - the South Australian and West Australian governments have increased their subsidies to 75 per cent of a fare and the Victorian Government has its cap set at \$60 a trip.

In order to improve WATs in Victoria, in 2008 the Victorian Government issued 330 new WAT licenses, it also commenced subsidies for a course in Wheelchair Accessible Training Services for taxi drivers, including additional out-of-pocket expenses for those who successfully complete the course, and subsidies for new or replacement WATs in country Victoria. NSW should look at such initiatives to improve the availability and standards of WATs in NSW.

Recommendation: Increase number of Wheelchair Accessible Taxis.

Interstate reforms

TTF recognises that issues within the taxi industry are not confined to NSW. Almost all of the major state governments of Australia have recognised endemic issues within the taxi industry igniting inquiries, audits, and reviews of standards of service across the country within the past two years. In addition, the ACCC is currently in the Federal Court pursuing a case against Cabcharge Australia Limited for alleged breaches of the Trade Practices Act.

While reform of the industry has occurred in varying degrees in many states and territories, the recent changes in Victoria and Queensland are of particular note for addressing a number of issues across the industry. TTF believes these reforms can form the basis of similar changes in NSW.

Victoria

Throughout 2008 and 2009 the Victorian Government undertook a suite of reforms to improve taxi services. It included the release of over 500 new taxi licences, 300 of which were WAT licences, a new model bailment agreement for drivers and operators, the introduction of prepaid fares between 10pm and 5am, a 50 per cent subsidy to help fund the cost of mandatory driver protection screens, improved driver training (including the Knowledge of Melbourne test) and training for drivers to help them assess workplace risks and learn skills to manage difficult passengers. The Victorian Taxi Directorate also undertook a complete audit of every taxi in the state to ensure vehicles were safe and roadworthy.

Any reforms undertaken in NSW should seek to emulate the Victorian government's 17 point taxi and hire vehicle industry reform package. This has brought tangible

improvements in customer service and working conditions for drivers and has seen the establishment of an independent licence regulator. Melbourne has consistently ranked as the favourite city to catch a taxi among survey respondents.

Queensland

In July 2009, the Queensland Government announced a reform package of the taxi industry targeted at improving driver standards. Reforms included improved driver authority eligibility criteria, adoption of training standards being developed through the Transport and Logistics Industry Skills Council, the introduction of a targeted taxi compliance unit in Queensland, improvements in information about performance of the industry through a taxi complaints hotline, mystery shopper services, quarterly Nielsen survey data, and the establishment of a Taxi Industry Advisory Committee. Taxi industry compliance data has been extrapolated from quarterly compliance reports and licence cancellation and suspension reports produced within the Queensland Department of Transport and Main Roads.

Recommendation: Consider adopting interstate reforms in NSW.

Concluding Remarks

The NSW Taxi Industry Inquiry is a timely response to the increasing need for greater taxi service standards in this state. The interdependent relationship between the tourism industry and taxi services is critical in shaping the perception of NSW as a business and leisure destination and encouraging greater expenditure within the local economy.

TTF is encouraged by the inquiry's proposed examination of interstate taxi regulatory systems, with recent changes to the Victorian and Queensland systems providing the review with a number of examples of possible reform for NSW.

It is imperative that the NSW government remains committed to delivering genuine, long-lasting improvements to the taxi industry. TTF acknowledges the NSW Government's renewed commitment to improving taxi services and looks forward to working with the government to achieve future improvements through the outcomes of the inquiry.

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TAXI STANDARDS IN AUSTRALIAN CITIES

In early 2008, the Tourism and Transport Forum (TTF) conducted a survey of business executives' attitudes towards service standards in the Australian taxi industry. This study has been repeated in December 2009.

The survey was conducted with senior staff of the most prestigious organisations in Australian tourism, transport, aviation and the professional services sectors. These include some of the country's leading airlines, hotels, public transport operators and attractions.

TTF members are frequent travellers who rely heavily on taxi services and are therefore highly qualified to compare taxi standards across Australian cities.

Since many of TTF's members come from the transport and service sectors, this survey also represents something of a 'peer review' of taxi standards and service levels.

The majority of respondents were based in Sydney (52 per cent), followed by Melbourne (22 per cent) and Brisbane (10 per cent).

Key Findings

1. Taxi services are letting down cities

Across the board, taxi standards are regarded as poor. 74 per cent of respondents said taxi services 'failed' or 'significantly failed' Australian cities. This was an increase of 11 per cent on 2008 levels. Just 14 per cent of executives were 'satisfied' with the taxi industry.

Open ended feedback from respondents focused on poor levels of customer service, geographic knowledge and cleanliness.

2. Services in every city rated poorly with Sydney identified as the least favourite city for catching taxis

When asked to rate each city, no city achieved an average rating of 'good' and the worst results were returned for Sydney, Canberra and Perth.

The majority of respondents (53 per cent) said Sydney was their least favourite city for catching a taxi. The most favoured city was Melbourne (favoured by 36 per cent).

3. Card surcharging levels are out of control

88 per cent of business executives said that the 10 per cent surcharge for card payments in taxis is 'unreasonable'. Of them, more than half said that this charge was 'very unreasonable'.

4. There is an appetite for reform

90 per cent of respondents said that reform to the taxi licensing regime should be explored (up 7 per cent on 2008).

75 per cent believe chauffeur hire cars and limousines could play a greater role in delivering taxi style services (up 7 per cent on 2008).

"A taxi that is clean, in good working order, appropriately heated or cooled (depending on the time of year) and driven by a polite person who knows where they are going is definitely in the minority."



Overall Ratings

While it was expected that satisfaction levels with taxi services would be low, the level of dissatisfaction was remarkable.

Q: Considering such factors as knowledge, driving skills, customer services, language skills, safety, vehicle cleanliness, booking reliability, availability and other factors, how would you rate your overall satisfaction with the taxi industry?

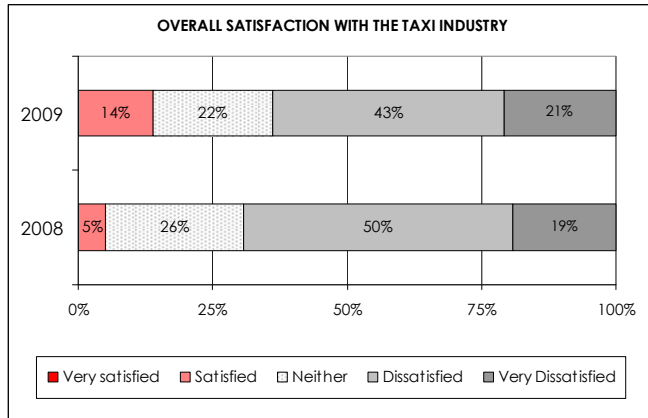
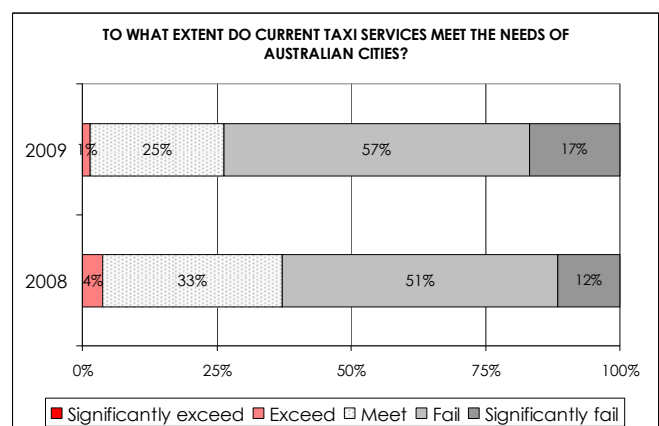
64 per cent of business executives rated their overall satisfaction with the taxi industry as 'dissatisfied' or 'very dissatisfied'.

Just 14 per cent – or 1 in 7 – were 'satisfied' with the taxi industry and none were 'very satisfied'.

That said there was a mild improvement in satisfaction on 2008 levels.

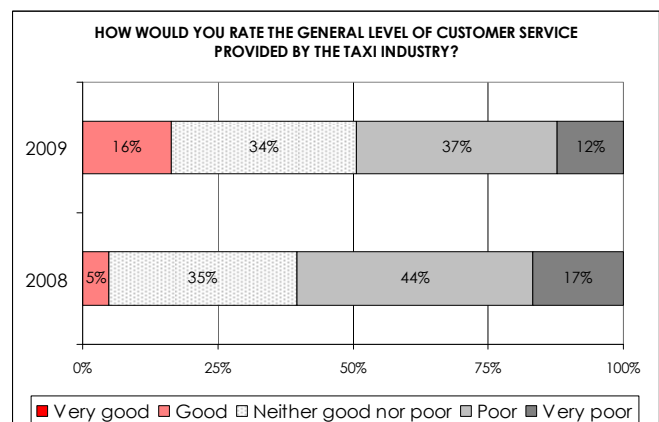
An overwhelming 74 per cent of respondents believe that current taxi services either significantly fail (17 per cent) or fail (57 per cent) to meet the needs of Australian cities. This is an 11 per cent increase on 2008 levels.

25 per cent of respondents feel that current taxi services meet the needs of Australian cities, and only 1 per cent believe that taxi services exceed the needs of cities.



Q: How would you rate the general level of customer service provided by the taxi industry?

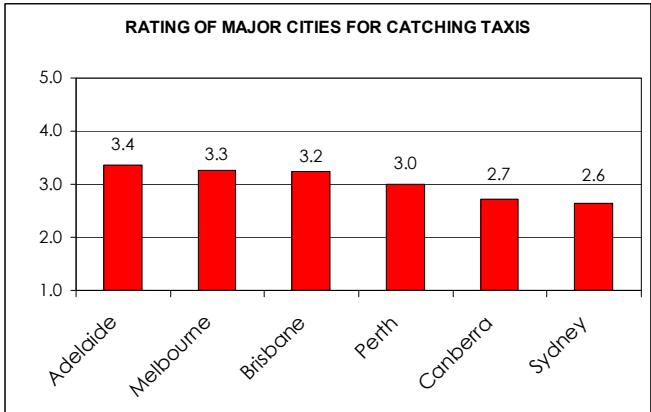
49 per cent of respondents thought the level of customer service provided by the taxi industry was poor (37 per cent) or very poor (12 per cent). This is a slight improvement on 2008 levels.



“Local knowledge generally poor, language skills generally poor, cleanliness of cars generally poor.”

Q: An effective taxi service is critical to the functioning of Australian cities. To what extent do current taxi services meet the needs of Australian cities?

“Not enough cabs on the streets. Driver's knowledge of city is extremely poor. Drivers do not know landmarks, restaurants or hotels. Drivers taking windy, long routes.”



Rating: 1 = Very poor, 3 = Neither good nor poor, 5 = Very good.

Open ended comments frequently criticised the knowledge of drivers and cleanliness of taxis in Sydney and identified significant capacity issues in Canberra and Perth.

“Terrible availability in Canberra.”

“Many drivers in Sydney have no clue where they are going or how to get there.”

City by City

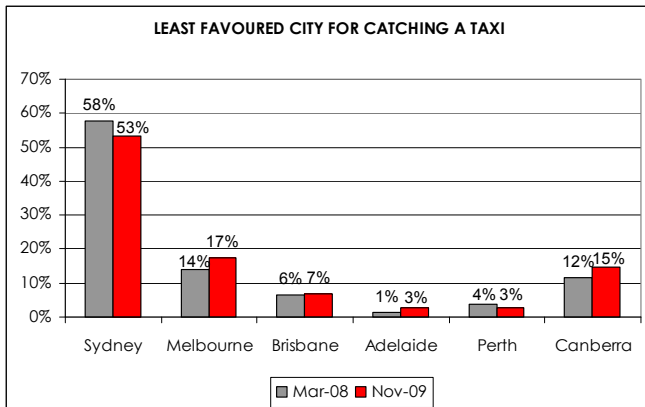
Respondents were asked to rate taxi services in major Australian cities and also to select their most and least preferred cities for catching taxis.

Q: Considering factors including reliability, availability, customer service, driver knowledge and accessibility, how would you rate the following cities for catching a taxi?

It was found that no Australian city received an average rating of ‘good’ or better. The lowest ratings were given to Sydney (2.6 out of 5), Canberra (2.7) and Perth (3.0).

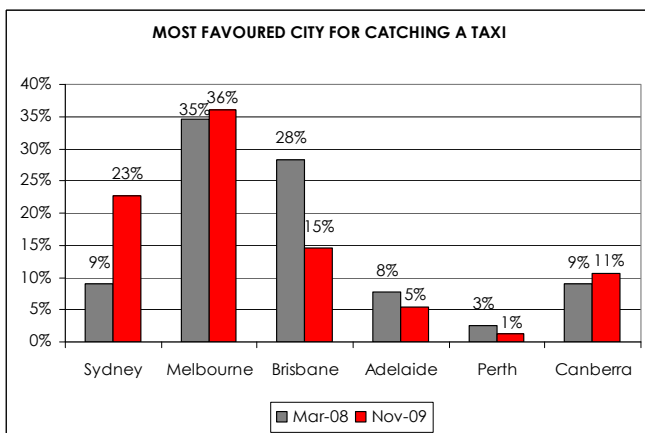
Q: Considering factors including reliability, availability, customer service, driver knowledge and accessibility, which is your LEAST and MOST favoured city in Australia for catching a taxi?

Consistent with these ratings, Sydney was nominated as the least preferred city in which to catch a taxi for 58 per cent of participants. Rankings were consistent with levels recorded in 2008.



Melbourne was the most commonly nominated 'preferred' city for catching a taxi (36%).

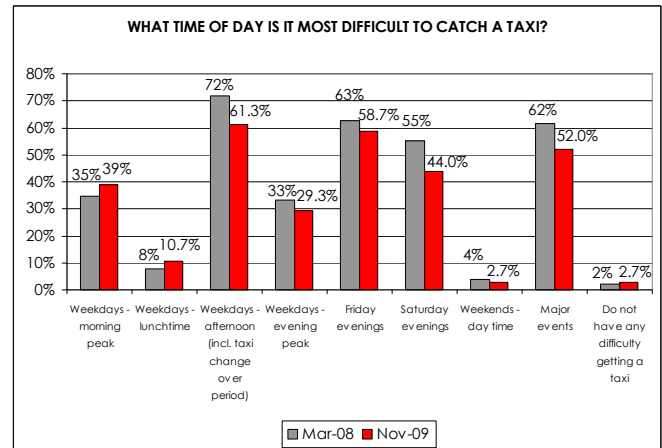
There was a relative slump in the proportion of respondents who said Brisbane was their preferred city for catching a taxi (down from 28 per cent to 15 per cent). Sydney improved by 14 percentage points.



Q: At what time of day, if any, do you have difficulty getting a taxi?

The times of day that respondents indicated were most difficult to catch a taxi were on weekday afternoons during the taxi changeover period (61 per cent), Friday evenings (59 per cent) and major events (52 per cent).

Only 3 per cent of respondents had no difficulty getting a taxi. Responses were consistent with time periods reported in 2008.



Other issues

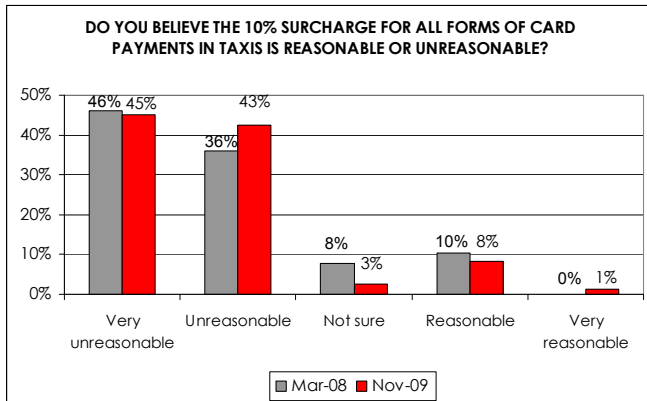
Q: Do you believe the 10% surcharge for all forms of card payments in taxis is reasonable or unreasonable?

88 per cent of respondents thought the 10 per cent surcharge for all forms of card payments in taxis was unreasonable (43 per cent) or very unreasonable (45 per cent).

Just 1 in 10 respondents thought the surcharge was reasonable or very reasonable.

These findings are of considerable importance, since tourism and transport executives have a high reliance on credit cards in their own businesses and would be very familiar with the cost of processing transactions.

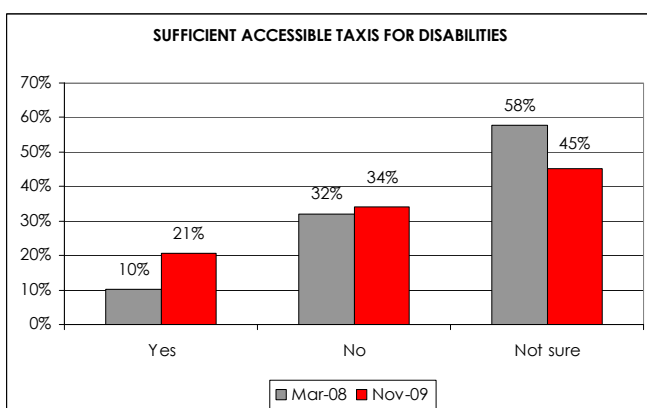
Tolerance of the 10 per cent surcharge is now lower than in 2008 (up to 88 per cent believing it is 'unreasonable' from 81 per cent in 2008).



“Surcharge of 10% is outrageous. Bill on bill on bill with all the on costs.”

Q: Do you believe there are sufficient accessible taxis in your city to ensure reliable and efficient services for people with disabilities or not?

The majority (45 per cent) of respondents are not sure if there are sufficient accessible taxis. However, of those with an opinion, 34 per cent said there were not sufficient taxis for disabled customers and just 21 per cent said there were.



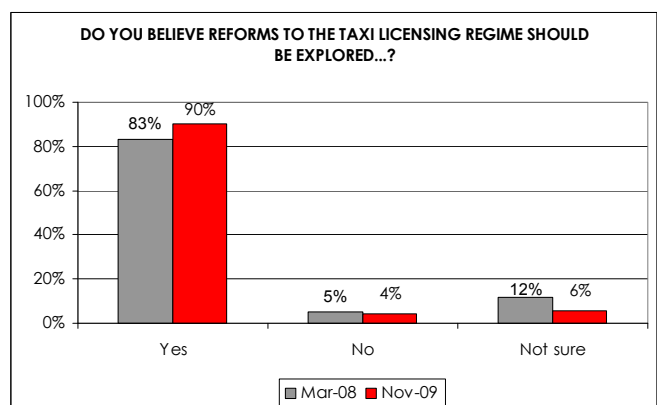
Q: Do you believe taxi drivers receive sufficient training to ensure they deliver a high standard of service to tourists or not?

Overwhelmingly, 100 per cent of respondents thought that taxi driver training was not of a sufficient standard to service tourists (97 per cent response from the 2008 survey).

“Australian taxis are seriously below the normal standards in most other developed nations and are a source of national embarrassment. More importantly, the training and safety standards are dangerously poor. This sector needs a dramatic overhaul as an urgent priority.”

Q: Do you believe reforms to the taxi licensing regime should be explored (private taxi networks, expansion of fleet, peak service licenses, etc) to allow greater availability and reliability?

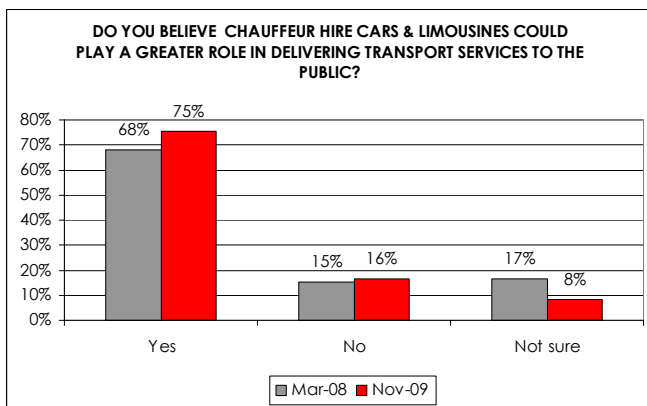
There was a strong appetite for reform of the taxi licensing regime, with 90 per cent of respondents expressing a preference for reform. 6 of the remaining 10 per cent were ‘unsure’ and only 4 per cent were opposed to the reform. Levels were consistent with 2008.



“Kennett’s reform measures for the taxi industry in Victoria should be emulated in other states / territories.”

Q: Do you believe chauffeur hire cars and limousines could play a greater role in delivering transport services to the public or not (e.g. allowing customers to hail them on the street)?

As in 2008, there was strong support for allowing greater use of chauffeur hire cars and limousines to play a greater role in delivering transport services. 75 per cent supported this measure.



About the Survey

The survey was distributed to senior staff within TTF’s membership organisations and other leading tourism businesses around the country. In March 2008 the survey was completed by 78 participants and by 79 participants in November 2009.

Participation in the survey was voluntary and we cannot disclose the identity of those organisations who responded. However, the survey was made available across the tourism and transport sectors, to airports, airlines, hotels, attractions, hospitality, business events, government organisations and investors.

TTF is a national, Member funded CEO forum, advocating the public policy interests of the 200 most prestigious corporations and institutions in the Australian tourism, transport, aviation and investment sectors.

MORE INFORMATION

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