



POSITION PAPER

NSW Hire Cars Beyond June 2020 - Implications Far Beyond P2P Transport



Position Paper created by the *NSW Hire Car Association for Transport for NSW*
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ABSTRACT

The NSW Government passed new legislation and reforms in 2016 which revoked long established hire car licences and require operators to return HC plates on 30th June 2020 - which will result in the loss of access to bus and transit lanes. This loss will add 30-60 minutes travel time to many customer trips, especially those taken during peak hours, and further exacerbate traffic problems as 1500 working vehicles are pushed to already congested Sydney roads.

Travel and Tourism is one of the largest and fastest growing sectors in the world. In Australia it contributes over \$136 Billion (10.9%) to the national GDP and employs 12.5% of Australia's workforce.ⁱⁱ

In NSW the hire car industry alone makes a direct contribution of \$320million to the economy and a further \$320 million in indirect contributions. **Professional hire car drivers and operators are those who are full-time dedicated to the provision of differentiated ground transport services to clients.** This groups of service providers do not indulge in this service as a part time supplement or extra-income hobby. **Professional hire cars and the efficiency of their services are essential in a leading world city such as Sydney and have far reaching implications far beyond being merely another transport option.**

Hire car customers are primarily high productivity business and private users whose contributions to the NSW economy is in the order of tens of billions. Efficiency of transport is a critical requirement of this consumer group. In addition, this consumer group does not currently know or believe the loss of access to bus and transit lanes will actually come into effect.

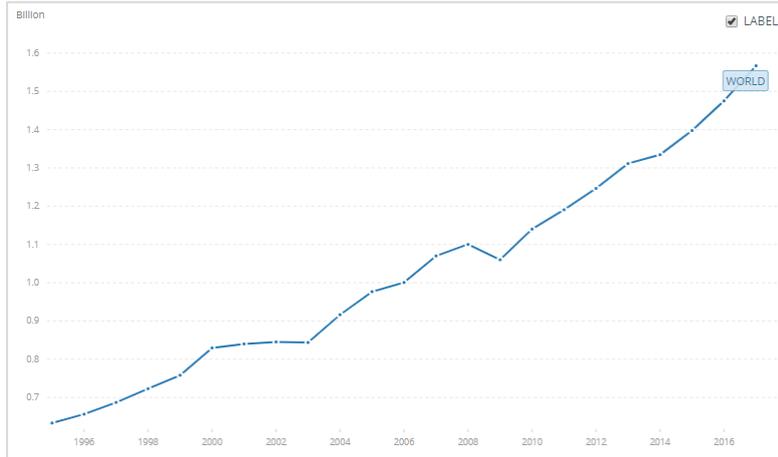
This paper is written for submission to **Transport for NSW** to outline the key challenges, desired outcome, the market opportunity and evidence of the customer mindset regarding this issue. We hope this paper will serve as a serious platform to prompt urgent progress in the discussion to **find a viable solution well before 30th June 2020.**

TRAVEL INDUSTRY – PERSPECTIVE & ECONOMIC IMPACT

Global travel industry gross bookings reached \$1.6 trillion in 2017, making it one of the largest and fastest growing sectors in the world.ⁱⁱⁱ Factoring in the indirect economic contributions, travel and tourism now accounts for a staggering 10.2 percent of global GDP.^{iv}

Over the past two decades, the number of international travel departures across the globe has more than doubled from roughly 600 million to 1.57 billion (see figure 1).^v

Figure 1: Global tourism international departures 1996-2017 (Source: World Bank)

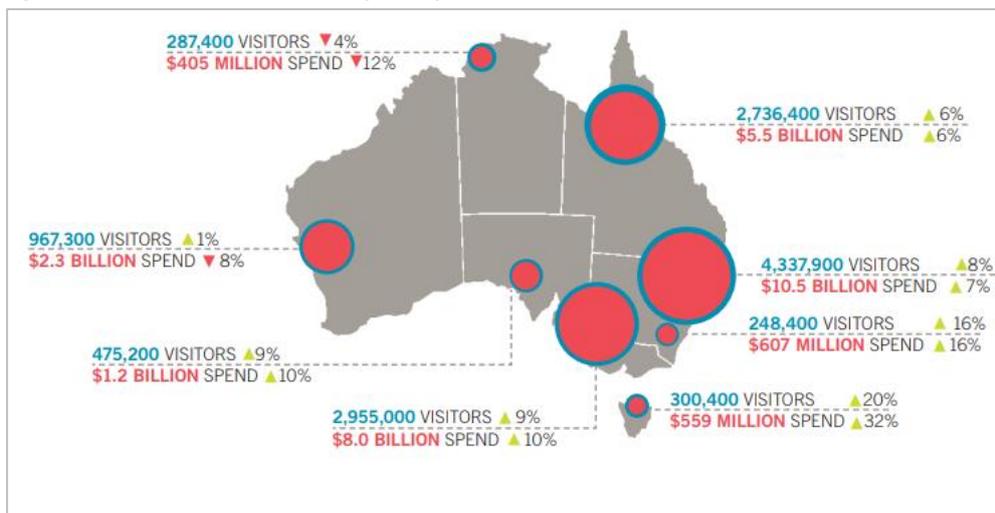


The key drivers behind this staggering growth are rising population and increasing disposable income (in both developed and emerging countries) leading to the mobility of millions of new consumers in both private and business travel spheres. Similarly, in NSW the travel market is expected to continue growing primarily due to increasing population, increasing disposable income and increasing inbound tourism.^{vi} **Interestingly, observations in spending shifts show consumers are moving away from purchasing products and more towards purchasing *travel experiences*.**

In Australia specifically, in 2016 Travel & Tourism generated a total contribution of \$136 billion to the national GDP, which equates to a total of 10.9% of national GDP (considering direct, indirect and induced contribution), and employed 12.6% of Australia's total workforce in that same year.^{vii}

NSW makes the largest state contribution to national travel and tourism turnover (see figure 2). In the 12 months preceding March 2018 saw an 8% increase in visitor numbers to 4,337,900 who generated \$10.5 billion in direct spend (up 7% on previous 12 months).^{viii}

Figure 2: International visitors and spend by state – YE March 2018^{ix}



Travel & Tourism is clearly a growing industry which makes a strong and essential contribution to the overall economy in Australia and especially in NSW. Importantly, if hotels, airlines, and local activities and experiences represent the core of the travel industry, then ground transportation is the glue that ties it all together.^x

The ground transportation industry globally and in NSW is recovering from the impact of heavily invested global disruptors who in addition to introducing new transport choices such as on demand ridesharing are also challenging the status quo as intermediaries of traditional services (such as Uber Black for HC plated vehicle services).

While these global giants have the advantage of technical innovation and funding to purchase market share (through heavily discounted pricing) what local suppliers excel at is the guest experience. **If we believe the longitudinal shifts in consumer spending centres more and more on “experience” then tenured local suppliers still have a critical role to play in the provision of suitable services to a vast cross section of business and leisure travellers.**

In fact, the provision of unique guest experiences to our customer base is the primary reason why the impact of ridesharing to hire car operators was much less severe compared with the impact on the taxi industry.

NSW HIRE CAR JOURNEY - 2012 TO PRESENT

In October 2012 the global phenomenon of *ridesharing* arrived in Australia in the form of one global operator known as *Uber*. This caused immediate and large-scale disruption to an established passenger transport industry dominated by taxi networks alongside which operated a smaller professional hire car industry. The disruption was enabled through the operation of this ridesharing service outside the strict parameters of the governing public transport laws at the time, which gave Uber distinct advantage over existing traditional operators.

The key challenges faced in curbing the “illegal” operation of ridesharing are complex and outside the scope of this position paper but for the record include: a substantially funded global corporation with ability to buy market share and tie local authorities in court indefinitely, wide-spread public adoption and support due to longstanding issues with taxi services unable to meet consumer demand, and the power of instant access mobile technology.

Governments across Australia, as previously seen globally, scrambled to respond to this changing landscape. *On 1 July 2015 the (NSW) Minister for Transport and Infrastructure announced the establishment of an independent Taskforce to examine the future sustainability of taxis, hire cars and other emerging point to point transport providers in NSW, including ridesharing services.^{xi}* The taskforce was headed by Professor Gary Sturgess and the resulting *Point to Point Transport Taskforce Report to Minister for Infrastructure and Transport* became the cornerstone of the framework that lead to the *Point to Point Transport (Taxis and Hire Vehicles) Act 2016 No 34^{xii}* and the related *Point to Point Transport (Taxis and Hire Vehicles) Regulation 2017^{xiii}*.

The key outcome of this new framework relevant to this paper was the elimination of traditional “hire car” licences, the recall of HC plates in December 2016 and subsequent loss of bus and transit lane access.

The key impact of the loss of access to bus and transit lanes is the addition of 30-60 minutes to many customer trips in peak hour traffic times. This is a catastrophic outcome that consumers who rely on hire cars for increased productivity still (at the time of this paper) either don't know about or as cited by many "don't believe it will ever happen".

In June 2015 a coalition of the larger hire car operators was formed under the banner of the *NSW Hire Car Association*^{xiv} to make urgent representations to government on the catastrophic effects of the immediate loss of HC plates on families of the 1500 HC plate operators, thousands of employees employed by the industry and many thousands of customers. **After urgent representations by the NSW Hire Car Association to Minister Andrew Constance & Transport for NSW, the recall of HC plates was extended to 30th June 2020 to allow for a more considered transition.**

MARKET SIZE & OPPORTUNITY

Current Market Size

In 2016, at the time the new Act was passed into law, there were 1500 HC plates on licensed vehicles in NSW. These vehicles are estimated (conservatively) to complete 7,500 trips per day and contribute **\$312,000,000 in direct turnover** to the NSW economy. A further **\$300,000,000 is estimated to be contributed indirectly via auxiliary products and services** supporting this industry, a further unquantified induced contribution would also be made through discretionary spending by professional hire car operators, drivers and direct/indirect industry employees.

Professional Hire Car Operator Characteristics

The professional hire car industry in NSW has been established and operating for over four decades. The industry is uniquely identified by government-issued HC plates on licenced vehicles, which allows these vehicles access to bus and transit lanes.

The hire car industry primarily serves the NSW business community and on a daily basis facilitates the safe and efficient transport of persons who have a material impact on NSW commercial activities and economic development. In addition, the NSW hire car industry has been a preferred transport option for vulnerable and special needs passengers.

Hire car providers are small-medium businesses run and managed by self-employed operators whose families live off the income generated. These businesses do not have excess funds to invest in wide-spread PR and marketing campaigns and certainly could would never have been able to wage a campaign against a cashed up global opponent or even protest adequately against an unexplained government recommendation to entirely remove this class of service without plausible reason.

Most importantly, **professional hire car operators are those business operators and drivers who are full-time dedicated to the provision of private hire car services to clients.** The daily provision of grounds transport services is the full-time dedicated profession of this group of service providers. Many operators and drivers become extensions of the families they serve.

They do not indulge in this as a part-time supplement or extra income hobby as is evidenced in other form of ground transport.

Customer Characteristics

The market currently serviced by professional NSW HC plated vehicles is a broad cross section of the business and leisure travel community and includes the following user groups:

- Corporate leaders and executives
- Government officials and public servants
- Members of the federal and state judiciary
- Visiting overseas political dignitaries
- Visiting diplomats, international leaders and royal families
- Entertainment industry – celebrities and specialty events
- Events and conferences – across a broad spectrum of industries including political summits
- Sporting events
- Inbound luxury travel clients
- Private wealth clients
- Children and elderly parent of business clients who want their loved ones taken care of by someone that they know and trust
- Timely transfers for Veterans and other special needs clients which include daily travel to and from hospital appointments and specialist treatments such as dialysis.
- Long distance Intrastate & interstate transfers for passengers who cannot fly due to medical reasons

These users collectively make contributions to the NSW economy (both directly and indirectly) in the order of tens of billions of dollars. The loss of access to bus and transit lanes would add 30-60 minutes of additional travel time to many trips, particularly in peak hours, and that element alone would reduce daily productivity substantially.

The characteristics of this broad user base are varied and unique to each user group. These users rely on professional hire cars on a daily basis to efficiently transport them from point to point and are most effectively served by operators who come to know them and their unique requirements.

Customers who responded to the NSW Hire Car Industry Study^{xv} had the following observations:

- 83% said access to bus and transit lanes was “very important” to them
- 95% indicated they expect to maintain or increase use of hire cars in the next decade
- 1 in 4 customers cited they had **never** used a taxi or ridesharing

Sample customer testimonials included in this paper directly confirm and support this understanding.

Current Customer Mindset & Knowledge Gap

The alarming reality is that the majority of this important consumer group either does not know about the pending loss of access to bus/transit lanes in June 2020, or believes “that will NEVER happen”. Member of both federal and state judiciary have been especially dismissive of this pending issue. This group of consumers allegedly lobbied for hire car access to bus and transit lanes many decades ago for security reasons.

There is indisputable evidence that this consumer group does not fully understand the direct impact of the 2016 P2P Act and Regulations to their daily routine and productivity. **It is critically important and indeed responsible that TfNSW and other key government stakeholders conduct an awareness campaign for this consumer group and provide an opportunity for public dialog as a matter of urgency. The NSW HCA and its constituent members are certain that government stakeholders will find a resounding opposition among this influential group of consumers to the pending hire car vehicle loss of bus/transit lane access.**

Below are some excerpts from customer testimonials submitted in support of this paper (attached as references are the whole customer submissions received). Please note, while this is a very small number of submissions it is a very accurate representation of the sentiments which have been consistently cited by a broad cross section of hire car customers.

These views were firmly confirmed during the customer interviews and surveys conducted during the NSW Hire Car Strategy study in August to October of 2018.

There is growing demand for a suite of future mobility options across NSW including dedicated shared mobility infrastructure both across the State's major population centres and this demand is strongest in Sydney... If this legislation is maintained in its current form, it will result in the loss of access to bus and transit lanes in Sydney for this important sector of the NSW transport industry. It is critical that a compromise is found to assist this sector and the visitors and business community they support. **Margy Osmond, Chief Executive, Tourism & Transport Forum Australia**

HC plated vehicles currently provide a very important and reliable service to the business sector in NSW and can only do so efficiently by having access to bus and transit lanes.... It is inconceivable to imagine the implications to business travellers in NSW who would be deprived of suitable point-to-point transport options." **Tim Worner, CEO Seven West Media**

"I believe this to be a matter which should be discussed in public, as it will have a substantial impact on a number of important constituencies... I not only use HC cars for my work, but often on a personal basis. Each time, use of a HC plated vehicle keeps my car off the road." **Sam Weiss, Chairman, Altium**

Hire cars are used extensively throughout the events industry for transport for key people such as special guests, keynote speakers and other important stakeholders to and from events. Hire cars complement the transport options for those prepared to pay a premium for the experience - a world city requires this.... The NSW business community cannot support a loss of access to priority lanes which enable the safe and efficient transport services currently provided by the hire car industry. **Joyce DiMascio, Chief Executive Exhibition & Event Association of Australasia**

My work requires that I attend a variety of locations spread across greater Sydney, not all of which are serviced easily by public transport routes. I prefer not to add to the traffic congestion by driving my own vehicle I choose hire cars over taxis as I find that taxis can be unreliable.... As far as the service they are providing to the business community, I can see no reason as to why they would be denied use of these priority lanes when I assume regular taxi cabs would still enjoy the benefits. **Kitty Flanagan, Australian Comedian, Writer & Actor**

I ask you respectfully to take every consideration possible into account for a solution beyond June 2020 as the NSW business community cannot support a loss of access to “priority” lanes which enable the safe and efficient transport services currently provided by the hire car industry.

Hayden Quinn, Australian Celebrity Chef

“Most of our roads in major cities are bottlenecks during peak traffic times and the removal of access to bus/transit lanes for Hire Cars would be detrimental to running our company’s business efficiently, both economically and time. Time Is Money for all companies in Australia and the removal of this privilege will be a backward step for our business.”

3M - C Holdsworth, EA to CEO

“This is a matter which is not widely understood and to a large extent unknown by the majority of the business community.” **Deborah Hutton, Australian Media Personality**

Future Opportunity

A recent hire car industry study funded by TfNSW independently confirms the annual turnover (estimated conservatively by the industry) at around \$320M and importantly identifies through the customer survey results that *Hire cars provide a clear, compelling and differentiated market proposition over other point-to-point (P2P) transport options, and customers overwhelmingly identify the service quality, reliability, efficiency, safety, comfort and trust as major benefits.*^{xvi}

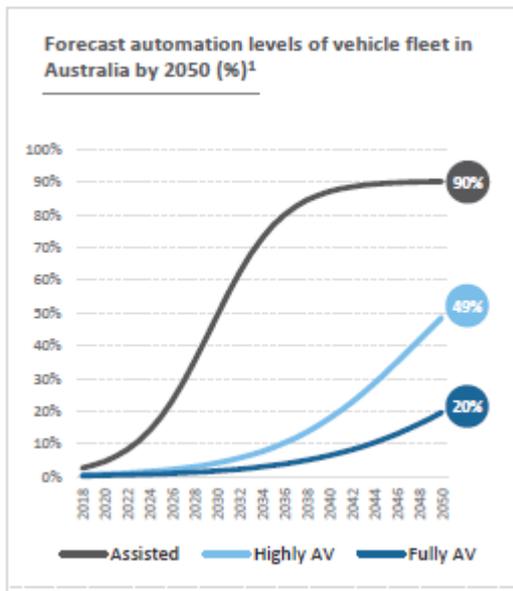
The study identifies a strong future growth opportunity and cites growing population, increasing personal wealth and rising tourism as key drivers of this growth (see figure 3).



Figure 3: Market Forecasts, NSW growth opportunity^{xvii}

In addition, the report rationalises the mainstream use of fully autonomous vehicles well beyond 2050. This is a generous timeframe which will allow natural consolidation in the industry and sufficient time for emerging strong players to invest in autonomous vehicles and other innovations in due course (p16) many of which have far reaching implications well beyond just the travel industry.

Figure 4: Technology Outlook – Mainstream AVs are still a while away



In terms of anticipated growth rates, the World Travel and Tourism council is forecasting Australia Travel and Tourism GDP to grow at an annual average of 2.6% over the next decade which could mean an increase in NSW hire cars direct market contribution from \$320 million per annum in 2018 to upwards of **\$420 million in 2028, plus another \$420 million in indirect contributions**, plus a currently undefined induced contribution.

These factors alongside a strong loyal customer base with differentiated transport needs will ensure that NSW hire car operators will continue to make a strong and growing contribution to the NSW economy well into the future.

IMPACT OF NEW P2P ACT & REGULATIONS

Positive Changes

The NSW Hire Car Association views many of the reforms outlined in the 2016 P2P Act and subsequent Regulations as positive changes which will increase transparency and accountability for all genuine operators.

This will allow the industry as a whole to refocus and importantly will allow for a natural selection process where forward thinking operators will thrive. This is a strong opportunity for strong players to emerge successfully from the disruption and take advantage of the market opportunity to provide unique and differentiated services to a large sector of the business community which is not served by other methods of transport.

Issues & Challenges

There are four key challenges arising from the imminent loss of HC plates in Jun 2020:

1. Loss of the professional hire car **identity**

This is a substantial challenge as historically operators and their customers were bound by a tangible *proof of standards* in the form of the HC plate. This designation on a licenced vehicle was an official “seal of trust” which inferred the operator and the vehicle met the government safety and compliance standards.

While the loss of this identity is an issue, the industry now broadly believes we can create a standard of excellence through other official mechanisms through Trademark Australia (such as the Heart Foundation tick and the Australian Woolmark logo have done for their respective industries). This is not an ideal outcome and will be a costly and arduous journey. But NSWCA members accept the challenge and see the long-term benefits of a self-driven “mark” of excellence which can become a tangible consumer “seal of trust”.

2. Loss of **access to bus and transit lanes**

This is the most critical challenge faced by hire car operators and their customers in NSW.

As referenced above, HC plated vehicles currently execute a conservative estimate of 7,500 trips per day and are able to do so efficiently by having access to bus and transit lanes. Removing that access would **increase transit times on some routes by 30-60 minutes during peak travel times. This is simply not a viable outcome for the business community in NSW.** In addition, **the movement of 1500 vehicle which are constantly on the road daily into already congested lanes will have a material impact and exacerbate existing congestion.**

Further, inexplicably, NSW is **the only** state in Australia to remove bus/transit lane access for professional hire cars following the legalisation of ridesharing and associated reforms (see figure 5).^{xviii}

Figure 5: NSW isolated approach on removal of HC licences & bus lane access

State	Distinct Hire Car Plates and Licenses	Bus Lane Access
VIC	 Discontinued but existing plates may be retained.	 Retained for existing plates.
QLD	 Discontinued but existing plates may be retained.	 Retained for existing plates.
ACT	 Distinct H-plate.	 Ongoing Access.
SA	 Distinct Chauffeured Vehicle plate.	 Never granted (taxis allowed).
TAS	 Distinct Luxury Hire Car plate (currently under review).	 Never granted (buses only).
NT	 Distinct Private Hire plate.	 Never granted (buses only).
WA	 Distinct Charter Vehicle License plate ² .	 Never granted (taxis allowed).
NSW	 Discontinued - standard state plates for P2P transport (excl taxis).	 Removed (taxis allowed).

 Distinct plate retained  Bus lane access retained  Removed or discontinued

3. Lack of Consumer Understanding

The pending loss of HC plates and access to bus and transit lanes is a matter which is **not widely understood** and **to a large extent unknown** by the majority of the business community who will be impacted by this change. Anecdotally, customers voice disbelief when given this information and the most common customer response cited is “surely that will never happen”.

This is a very serious situation for an important consumer segment that imagines it will continue to have access to P2P choices which are essential to the ongoing efficient function of their daily routines.

Included below under are statements from a diverse group of customers confirming this issue and serving as an example of the customer mindset. This can be taken as indicative of a vast cross section of the NSW business community and beyond.

4. Professional Plate Issuance Inconsistencies

There are currently two significant unresolved issues following the government reform announcements in December 2015.

First is the issue of “fake” HC plates. These are plates which have a HC prefix but do not include the wording *NSW Hire Car* which an authorised HC plate would have. These vehicles are sighted using bus/transit lanes on a regular basis. RMS, TfNSW and P2P have confirmed and acknowledged these plates should not have been issued but no action has been taken to exclude them from bus/transit lanes.

Second is the issue of TV plates to non-conforming vehicles which do not meet the “bus” criteria. These sedan and SUV vehicles are sighted daily using the bus & transit lanes across NSW. All regulatory bodies have confirmed these have been issued in error and will be recalled. At the time of this paper no visible action has been taken to recall these plates and these vehicles continue to operate and access bus/transit lanes on a daily basis.

The NSW Hire Car Association does not understand why in a time of strong reforms towards accountability this issue has not been addressed and resolved.

BUSINESS REQUIREMENTS POST 2020

The NSW Hire Car industry simply requires the following to allow for a continuation of services beyond 30th June 2020

1. Access to bus/transit lanes or other equivalent priority lanes
2. Recognition that genuine hire car operators are open to a user pays model
3. Recognition that this is very serious matter which impacts consumers generating over \$600,000,000 of direct revenue contributions to the NSW economy
4. Recognition that the affected consumer base does not understand or believe this outcome will come into effect and that a public awareness campaign and discussion must take place
5. Agreed solution well before June 2020 to allow time for a planned and seamless transition BEFORE 30th June 2020

CONCLUSION

The Global travel industry is one of the largest and fastest growing sectors in the world. Factoring in indirect economic contributions, travel and tourism now accounts for a staggering 10.2 percent of global GDP.

In Australia the Travel & Tourism sector currently generates over \$136 billion in direct revenue and employs over 12.6% of Australia's total workforce.

NSW makes the largest state contribution to the national travel and tourism turnover and in the 12 months preceding March 2018 saw an 8% increase in visitor numbers to 4,337,900 who generated \$10.5 billion in direct spend (up 7% on previous 12 months).

The NSW Hire car industry makes \$320 million in direct annual contributions and another \$300 million in indirect spend. This is expected to increase to \$420 million and \$400 million respectively by 2028. In addition, the industry serves a broad cross section of the business and private travel community whose contribution to the NSW economy is in the order of tens of billions. **This consumer group relies on the hire car industry to optimise the efficiency and productivity of their daily routines.**

NSW hire cars serve a very important purpose and make an important contribution to the NSW economy. The loss of HC plates in June 2020 and subsequent access to bus and transit lanes will have a material adverse effect on the industry and the consumer group who relies on its services. Further the consumer group who will be impacted currently does not know of this pending threat or does not believe this will actually happen. Customer testimonials included in this whitepaper accurately represent the views of the broader group.

This paper is a respectful call to TfNSW and other NSW State Authorities and stakeholders to urgently work together with the hire car industry to determine a viable solution beyond 2020 as soon as possible.

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Ritta has worked as the *Director of Government Relations & Strategy* with the NSW Hire Car Association since inception to provide advocacy on issues affecting hire car operators and drivers. Ritta works with the advisory council, key members and external consultants to define and execute the advocacy strategy.

The largest part of her portfolio is the remit to build relationships with senior Government officials, P2P industry stakeholders and stakeholders across various other industries to ensure an open dialog on the genuine requirements of hire car operators which will allow them to continue to providing efficient differentiated services to an important consumer group which is not served by other methods of transport.

Ritta also leads the discussion with various stakeholders on education and training for the industry.

ACKNOWLEDGEMENTS

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John Bartolotta – Chairman NSW HCA & CEO *Royale Limousines*

Glen Hames – NSW HCA Advisory Council, CEO *Towncars Networks Australia*

Simon Kalipciyan – Founder & Director NSW HCA & Chief Operating officer *Cars on Demand*

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Simon Kalipciyan – COO *Cars on Demand*

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Stan Vassilis – National Business Manager, *Royale Limousines*

Glen Hames – CEO *Towncars Networks Australia*

ABOUT NSWHCA

The NSW Hire Car Association (HCA) is a not-for-profit organisation created in June 2015 following the announced recall of hire car licenses and associated HC plates.

The NSW HCA is fundamentally a *coalition* of small to medium sized companies along with individual drivers, who have come together and united to form the NSW HCA in order to have a voice in the transport industry.

The NSW HCA sees our role as that of supporting and advocating for our members and the broader industry. We feel this can be achieved through the following three key areas of focus.

Collaboration

The NSW Hire Car association sees collaborative and positive relationships with government and industry stakeholders as essential to the success of our industry. We will continue to work diligently to ensure positive dialog with all stakeholders as required to facilitate the harmonious delivery of diverse services to various consumer groups. We believe the provision of our unique services to an important consumer group is essential in a world leading city such as Sydney and beyond across NSW.

Innovation

The NSW HCA also sees operational efficiency and technology innovation as the cornerstone of long-term sustainability. We will continue to explore solutions which serve our members and ensure long term affordable options.

As an example, we are in discussion with SIRA around building a self-funded technical platform that would allow operators of all sizes to track mileage and accurately meet their CTP mileage charges. This would avoid the gross and unnecessary commercial waste of each individual operator and driver investing in a stand-alone solution.

Education & Training

The NSW HCA has also worked hard to be a key partner in facilitating education and training for the industry. We feel we have been highly successful in changing the negative and defeat mindset of the industry towards a more positive and progressive way of thinking. We have worked hard to ensure that our members (and the industry beyond) was made aware of the **Business Connect** services provided by the *Department of Industry*. Many of our members have used the complimentary services and benefited from them.

We will continue to work in collaboration with government agencies and other independent service providers to provide education, training and support to the industry which raises standards across the board and provides value to members.

Our aim is to continue working collaboratively with TfNSW and other government stakeholders to find a viable solution which will allow us to continue serving our members and our important customer base efficiently beyond June 2020.

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