

COMMUNITY TRANSPORT OF THE FUTURE

Executive Summary

Report outlining the findings and opportunities identified in the research project -
Accelerating Innovative Local and Community Transport





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NOTE: As this report is being published, the coronavirus pandemic continues to impact many organisations, communities and technology developments mentioned within it. While little can be projected with any real certainty the research suggests that the national and international pandemic impacts will only increase the need to consider interim interventions and activities to reduce impacts on our transport networks, public transport and communities more generally, this is especially the case for Community Transport providers and customers who have been hit particularly hard by pandemic impacts.

Our project team extends deep thanks to these stakeholders in particular for their input and engagement in the development of this report and look forward to ongoing discussions, ITS Australia is committed to continuing to connect Community Transport providers, technology suppliers and policy makers to further explore and realise the benefits of technology to enhance services for our communities.

President's forward



Dean Zabrieszach

In partnership with our members, ITS Australia works to design relevant and practical research projects to support a range of transport industry activities and goals. At ITS Australia, we build relationships, advocate for industry, and engage with government to inform and advise.

ITS Australia is a proud member of iMOVE Australia, the national centre for applied research and development in transport. As iMOVE participants, we have undertaken to contribute financially over a 10-year period and work to develop and participate in research projects that advance our industry and shape the future of transport in Australia.

To that end ITS Australia is very pleased to present this report which synthesises research into *Accelerating Innovative Local Transport: Community Transport of the Future*, a research project developed by ITS Australia through the iMOVE CRC with our research partners the Institute for Public Policy and Governance at UTS.

Providing equitable and accessible transport options for those that need it most is a huge issue already and is only growing more acute as our aging population increases and our health policies focus more on living in place targets for disabled and older people.

The findings from previous ITS Australia research, *Mobility as a Service in Australia Customer insights and opportunities*, led us to consider potential technology applications for Community Transport.

This in turn highlighted that there was a limited depth of understanding about what Community Transport is and how it works. To better understand the potential for transport technology to provide opportunities for this essential sector we developed this research proposal in partnership with our members.

This work is intended to offer a foundational understanding of Community Transport operations across Australia, their critical role, the challenges they and their customers face and the potential opportunities for existing and emerging technology.

ITS Australia can deliver this and other research projects only with the valued help of our partners, as well as our broader membership. I sincerely thank our partners on this project, iMOVE Australia Ltd, University of Technology Sydney (UTS), Department of Transport and Main Roads Queensland, Transport for NSW, Department of Transport Victoria and Department of Transport WA.

Finally, building on the important relationships developed during this project ITS Australia will be supporting on-going discussions and workshops with the project committee and community transport stakeholders through a Community Transport and Technology Working Group.

Dean Zabrieszach
President, ITS Australia

A handwritten signature in black ink, appearing to read 'Dean Zabrieszach', written over a white background.

About this report

This report provides a summary of findings developed as part of the collaborative research project *Accelerating Innovative Local Transport – Community Transport of the Future*, made possible with funding from partners through the iMOVE CRC (Cooperative Research Centre) and supported by the Cooperative Research Centres program, an Australian Government initiative.

The main partners are: iMOVE Australia Ltd, ITS Australia, University of Technology Sydney (UTS), Department of Transport and Main Roads Queensland, Transport for NSW, Department of Transport Victoria and Department of Transport WA.

This project has worked in close collaboration with key stakeholders in the community transport sector, government and the transport technology industry to better understand the current context, challenges and opportunities in advancing the community transport sector, barriers and opportunities for accelerating innovation in community transport, and more broadly addressing major societal challenges associated with transport disadvantage.

The full research paper is available at [its-australia.com.au](https://www.its-australia.com.au)

Date of publication: March 2022

Project participants

- ITS Australia
- iMOVE CRC (Cooperative Research Centre)
- University of Technology Sydney (UTS)
- Main Roads Queensland
- Transport for NSW
- Department of Transport Victoria
- Department of Transport WA

Research partner

The research was conducted by the Institute for Public Policy and Governance, an independent, interdisciplinary research and consulting organisation within the University of Technology Sydney whose purpose is to shape policy, governance and decision-making for the public good.

<https://www.uts.edu.au/research-and-teaching/our-research/institute-public-policy-and-governance>

Acknowledgements

ITS Australia and the project participants would like to thank the Project Committee and key stakeholders for their contributions and ongoing support, the public and community transport sector has been particularly impacted during the COVID pandemic and their support and engagement is deeply appreciated.

Glossary

ABS	Australian Bureau of Statistics	IPPG	Institute for Public Policy & Governance
ACQSC	Aged Care Quality & Safety Commission	MaaS	Mobility as a Service
AIHW	Australian Institute of Health & Welfare	NDIS	National Disability Insurance Scheme
CHSP	Commonwealth Home Support Program	NHS	National Health Service (UK)
CT	Community Transport	PcF	Person-centered Funding
DoH	Department of Health	TfNSW	Transport for NSW
DRT	Demand-responsive Transport	UTS	University of Technology Sydney
HACC	Home & Community Care Program	WGO	World Health Organisation

Project goals

The project aimed to develop insights into the community transport sector and its context to inform government policy development and wider industry thinking about the role of community transport, key challenges and opportunities for innovation to enhance the future delivery of flexible, demand-responsive local and assisted transport.

The research particularly sought to:

- Holistically review community transport in Australia, including the current customer, service delivery, policy and funding ecosystem
- Explore barriers and opportunities for innovation and use of technology in community transport (and adjacent or equivalent services), and
- Develop insights on systemic, cross-cutting issues to inform future policy development and delivery approaches.

Community Transport
provides the glue
connecting users to vital
services and social
networks

Methodology

The research was conducted between May and December 2021. The project used a mixed methodology approach that incorporated:

Desktop research: three parallel literature and evidence reviews, examining and synthesising international evidence from a wide range of sources on:

- The customer and service delivery landscape.
- The policy and funding landscape.
- The technology and innovation landscape.

Interviews: 40 semi-structured interviews with government, industry, community transport providers and peak bodies and user representative groups

Workshops: a workshop with community transport providers and peak bodies, and another with community transport, government and industry stakeholders

Supplementary analysis: including demographic modelling and qualitative analysis of research findings from desktop research and interviews.



Executive Summary

Community Transport is more about the 'Community' than just transport – it provides the glue connecting users to vital services and social networks.

Access to transport is a basic human need that fundamentally impacts everyone's wellbeing and community transport is a critical element of our wider transport network that ensures suitable transport options exist for everybody, especially those with specific or more complex needs.

This research reveals how emerging technologies can improve community transport by increasing access for clients, allowing better allocation of resources by providers, and increasing client choice with improved customer experience.

Community Transport (CT) users are a growing and complex stakeholder group with challenging needs and expectations.

While there is limited data on the profile of customers for most jurisdictions and at a national level, based on interviewed stakeholders, in practice customers can be anyone whose needs are not being met by other forms of transport, and customers described in terms of those experiencing disadvantage.

Combined evidence from interviews and literature reviews indicates that the most prominent groups of users (which overlap) are:

- Older people
- Disabled people
- People who need to access non-emergency health services
- People in regional areas
- Women

Although the primary user groups are older people, disabled people and people living in rural and regional locations, there is no 'typical' Community Transport user and services are provided to customers of all ages and with a wide variety of specific needs.

The wider transport sector is currently undergoing a sustained period of technological change generally, thanks to technology, digitalisation, automation and access to data. New capability is creating new ways of planning and delivering services that have the potential to meet everyone's need, including our most vulnerable and disadvantaged communities. But there needs to be consensus and action starting now to ensure that we minimise transport disadvantage and maximise opportunities for our communities.

The Community Transport sector see opportunity to work with transport technology providers to partner on solutions that work for their customers and their organisations.

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But there needs to be consensus and action starting now to ensure that we minimise transport disadvantage and maximise opportunities for our communities.

This is a complex and challenging ecosystem and technology has the potential to improve Community Transport by:

- Increasing access for clients
- Better allocation of resources by providers
- Increased client choice
- Improved customer experience
- Improved client access and choice
- Higher quality, more responsive services
- Enhanced efficiency and productivity for providers
- Improved visibility and reach of services



Access to transport is a basic human need that has a fundamental impact on the well-being of each of us. Community transport is a critical element of our wider transport network that aims to ensure that suitable transport options exist for everybody, especially those that have specific or more complex needs.

The findings give us the clearest picture yet of the community transport landscape and where there are opportunities to deliver services that meet everyone's needs at both a system and service level.

This research highlights how needs are still not being met in many places, particularly for older, disabled and people living in regional or rural areas. It explores the options for improving the situation by having the right discussions and action, including through integration and innovation in the CT sector.

Our ageing population is just one reason why the number of people at risk of transport disadvantage will grow significantly over coming years.

This work is intended to offer a foundational understanding of Community Transport operations across Australia, their critical role, and the challenges they and their customers face. It has clarified some hesitations around technology, highlighting the advantages and the importance of reciprocal partnerships for technology adoptions.

The wider transport sector is currently undergoing a sustained period of technological change generally, thanks to technology, digitalisation, automation and access to data.

New capability is creating new ways of planning and delivering services that have the potential to meet everyone's need, including our most vulnerable and disadvantaged communities. But there needs to be consensus and action starting now to ensure that we minimise transport disadvantage and maximise opportunities for our communities.

Who does Community Transport help?

A significant minority of the population do not have equal transport access and may experience transport disadvantage and social exclusion. Barriers to access as well as a lack of adequate provision can be a major impediment to health and wellbeing for individuals, risks failure in major government programs, and imposes significant downstream costs on society.

12% of adult Australians sometimes have difficulty getting where they need to go and 4% either cannot get to the places they needed to go or often have difficulties in doing so. Many causal factors and forms of exclusion can influence transport-related exclusion, including physical, geographical, spatial, economic, social and temporal.

Older people, people with disability and those living in rural and remote areas are among the most likely to experience difficulties with access and mobility. Many experience compounding disadvantages and may have particularly complex needs.

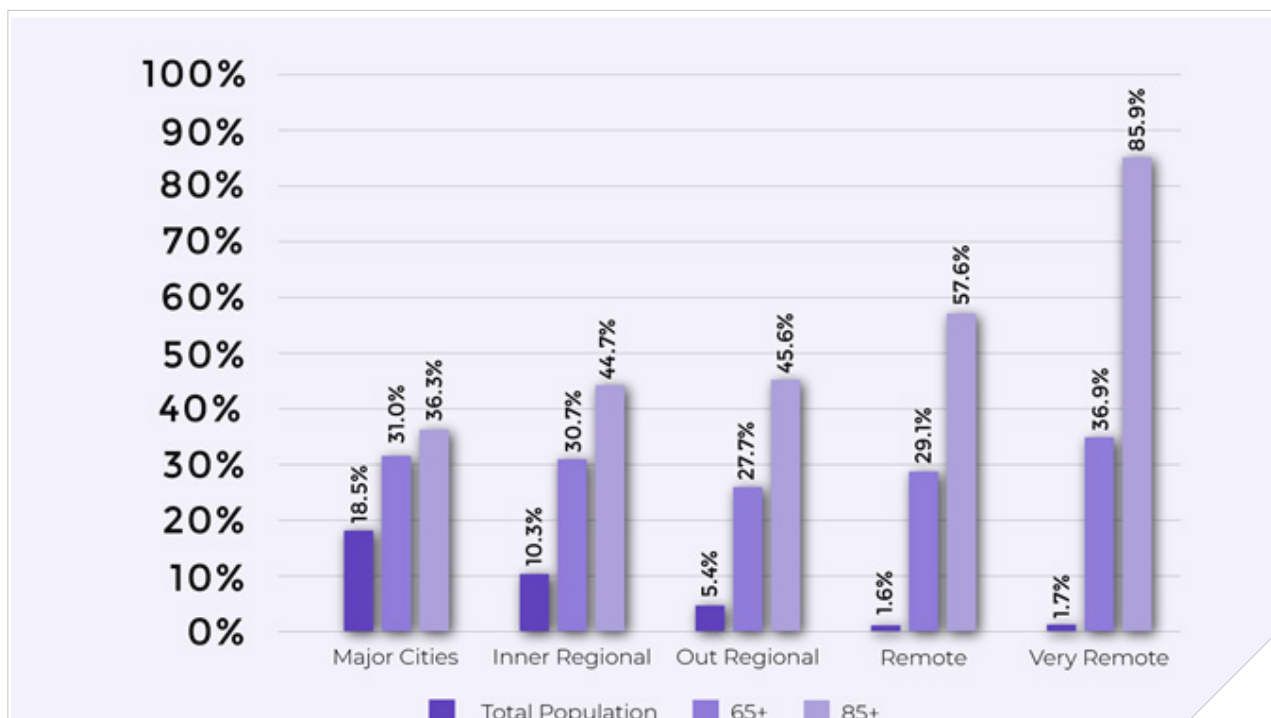
This is especially true for older people, who often face multiple barriers including mobility limitations, health restrictions, cognitive/emotional factors, psychosocial factors, reduced access to private transport, or having less income and experiencing financial vulnerability or disadvantage.

By 2030, the over 65 population is set to grow significantly in all regions. For people over 85 years old, the population in major cities alone is expected to grow by more than a third (36.3%) with growth progressively higher in more remote areas.

Older people are much more likely to be living with a disability. In 2018, 11.6% of people aged 0-64 years were living with a disability while the rate of disability rose dramatically to one in two (49.6%) for people aged 65 years and over.

Regional and remote areas will experience much higher growth in the older population relative to total population

Population growth in the older population by 2030



Source: Institute for Public Policy and Governance . Based on PHIDU (2021), ABS (2017)

Older people may also be more likely to experience social isolation. In 2020, the Commissioner for Senior Victorians published a report which found that 92% of older people rated personal mobility as critical to health, social wellbeing and independence. Being able to get around was seen as a major determinant of quality of life.

As both social preference and aged care policy places an emphasis on care at home, the number of people using home care is also rising significantly and has already tripled over the last ten years.

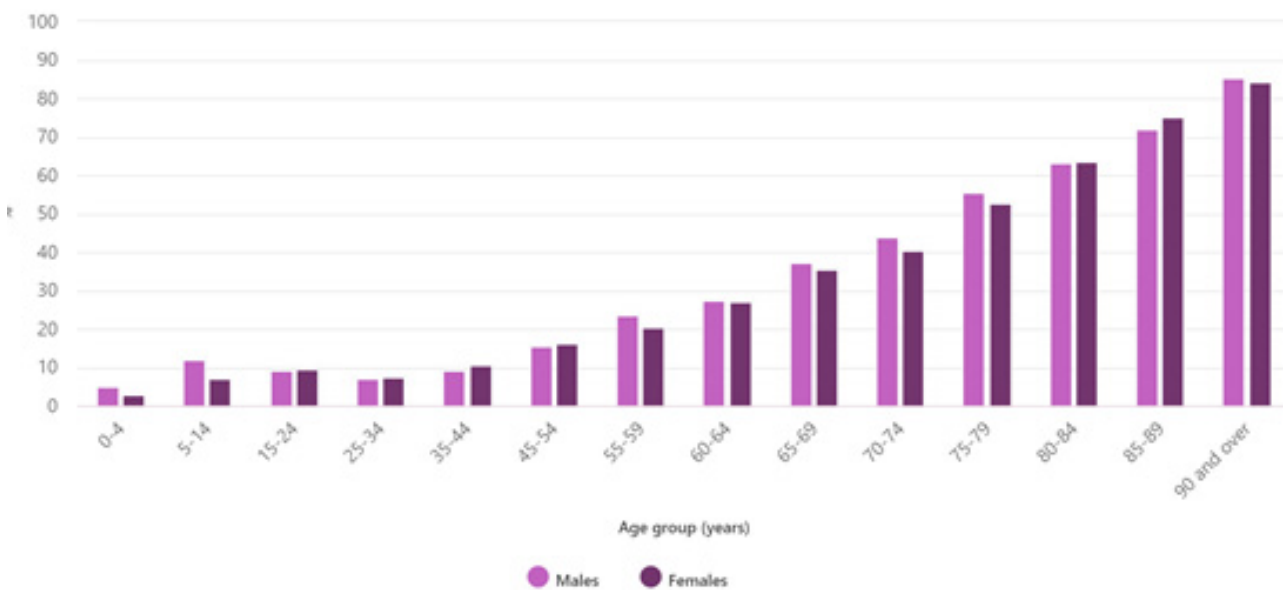
In 2018, there were 4.4 million Australians living with a disability. A further 22% of Australians have a long-term health condition, such as arthritis and heart failure, which may impact their ability to access personal or private transport. 5.7% of Australians have a profound or severe disability (nearly one in three people with disability). This means sometimes or always needing help with mobility.

Recent Australian Government research show that 'safe, accessible and affordable transport' is a severe issue for 24% of people with disability and a major issue for 31%.

For people living in rural and remote areas, factors around geographic and economic exclusion can be particularly significant. Low levels of public transport access, relatively low levels of vehicle ownership, non-family friendly transport options and generally limited transport options, as well as income inequality, can be significant barriers. For example, this can limit access to health services, education and employment, material and social resources, and participation in society, due to the cost of transport, distance, or because these services are not evenly distributed across the country.

Overall, this indicates a looming challenge over the next decade in providing for the increasing mobility demands of a growing older population experiencing complex needs and multiple forms of transport disadvantage.

Prevalence of disability by age and gender, Australia, 2018



Source: ABS (2018) Disability, Ageing and Carers, Australia: Summary of Findings

How does Community Transport work?

'Community transport' can refer to a wide variety of local, assisted and specialised transport services that are responding to and tailored towards specific assessed-individual, local community and place-based needs. Community transport is as much a community service as a transport one and has become "an increasingly common way of addressing unmet transport needs of people at risk of social exclusion." (Stanley & Lucas, 2008).

Evidence from interviews indicated that service providers are highly diverse:

- Operating models can span community-led not-for-profit, private or government (e.g., local council) run services. They may be single purpose, multi-service, or may be run under the auspices of a larger organization (e.g., a major hospital)
- Some providers are funded solely for providing transport services, while others offer a variety of services including transport. For example, a disability not-for-profit may provide transport as one of a suite of support services, even if they do not receive specific funding for transport
- Areas of operation vary significantly in scale between an area within a city, an entire city region or state-wide, with some providers operating across borders
- Fleet sizes ranged from 18 to 167 vehicles (although there are known examples of providers that may only operate a single vehicle)
- Fleet compositions also vary widely, and may include buses of various sizes, mini-vans, and sedans owned by the provider, or include volunteers driving their own private vehicles
- Numbers of paid employees ranged from 16 to 300 (though other evidence suggests some services have smaller numbers of paid staff), while many providers rely heavily on volunteers in delivering services
- Numbers of trips delivered each year by those interviewed ranged from 50,000 to 225,000

The research indicates several defining characteristics of community transport:

- **Specific user groups:** Older people and people with a permanent disability emerged as key users of community transport, while people living in regional and remote areas and people with temporary disability were also identified.
- While the most prominent users tend to be older people, people living with a disability and people living outside major cities, this is partly due to the way community transport is structured to respond to specific government funding programs and eligibility for services.
- Desktop research and interviews indicated that a high proportion of community transport customers are also female, which may be linked to the higher representation of women in the older population and higher prevalence of profound or severe disability in women over 80 years old compared to men.
- **Specific user needs:** Addressing transport disadvantage in general was frequently cited, while access to health and disability services and access to the community and social activities also emerged as prominent user needs.
- In 2016 research, 83% of community transport customers in NSW mentioned at least one health-related reason for using community transport, while 66% reported most often using community transport for getting to medical appointments.
- **How services are delivered:** Research participants emphasised the tailored and door-to-door nature of services, and the emphasis on care, as key features. The not-for-profit nature of many service providers and the important role of volunteers in delivery of services were also mentioned by several interviewees.

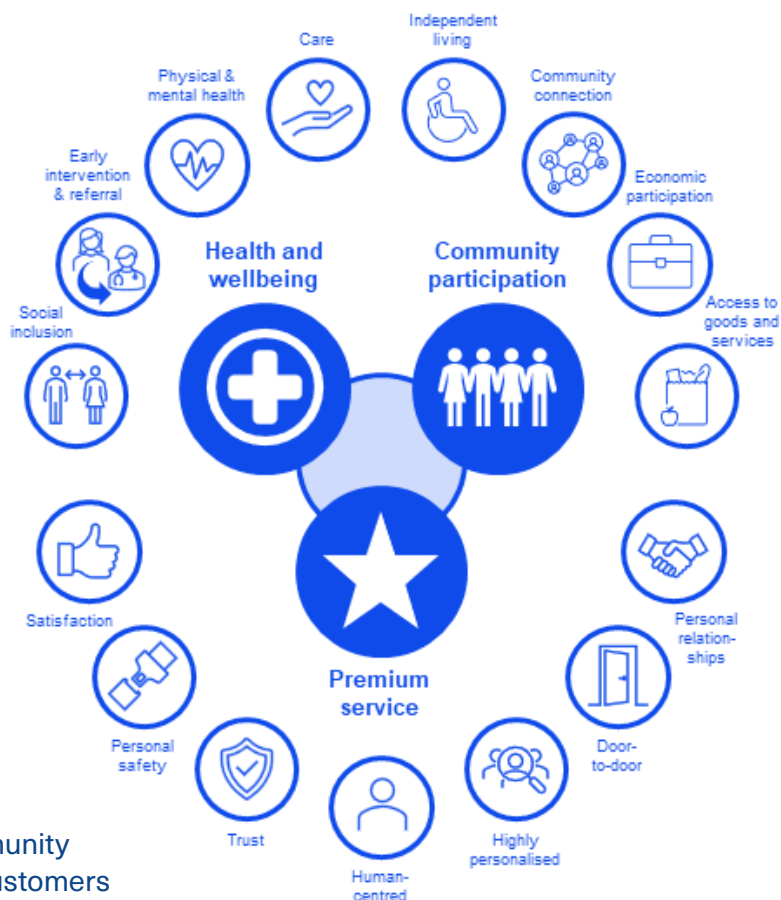
As a vital enabler of equitable access to services and participation for a wide range of vulnerable and disadvantaged people, community transport provides an essential support where conventional private or public transport systems are not considered viable or appropriate. In doing so, it delivers significant value:

- **To individual customers and local communities**, in providing premium, tailored services and care, and providing access to key services, local amenities and opportunities for social interaction, and
- **To government**, in facilitating wide-ranging social, health, aged care, disability and transport policy outcomes, by supporting physical and mental health, community care, social wellbeing, economic participation, and reducing health system costs.

Previous research has shown that community transport is a critically important service providing cross-cutting benefits across a range of policy areas, including transport, health, social services and leisure, and in tackling inequalities.

However, there is little specific or quantifiable evidence of the true value of benefits that community transport delivers.

Some previous attempts to quantify the value delivered by community transport using Social Return on Investment (SROI) methods indicate that for every \$1 invested community transport services deliver between \$8-23 in value (although some have claimed that services can deliver up to \$40 per \$1 invested).



Value of community transport to customers and the community

Source: IPPG

The complexity of transport disadvantage and its impacts in creating barriers to employment, healthcare, education, recreation and social inclusion, for example, have resulted in a wide variety of policy and funding responses that seek to address barriers to access for specific user cohorts, user needs and/or services in Australia.

The most relevant interventions are in health and aged care, disability and transport and delivered by multiple agencies across policy portfolios and levels of government, with varying focus but all ultimately aiming to improve access to essential services, social inclusion and full participation in the community.

Major government programs, especially Commonwealth funding programs for aged care and disability supports, provide a substantial portion of funding available to the community transport sector. In practice many community transport services are structured to respond to these programs and the customers whose needs they target. However, providers may also be funded through other non-governmental means and often rely on diverse sources of income to remain financially sustainable.

Given the variety of siloed programs, the diversity of the community transport sector and the position it occupies at the intersection of multiple policy domains, the landscape of funding available for community transport mirrors this complexity:

Australian Government funding programs. Primarily major national programs for aged care and disability, especially the Commonwealth Home Support Program (including \$181.7 million for CHSP-subsidised transport in 2019-20) and the National Disability Insurance Scheme (including \$700m for 'core' NDIS transport services in the 12 months to September 2021). These programs are subject to strict eligibility requirements and provide a mix of block funding to providers (via contracted service-level grant agreements) and individual person-centred funding.

State and Territory government programs. Vary between jurisdictions and across policy portfolios, but include transport, health and human services programs. These can include enhancements to public transport accessibility, recurrent programs (such as state Community Transport Programs) and non-recurrent programs, subsidies for different types of service or customer group (such as taxi subsidies or seniors travel concessions), non-emergency medical transport or patient transport service programs, as well as indirect funding of assisted transport via programs for other services.

Other diverse local and community programs and initiatives. These can include local programs or services provided by councils, local services, charitable organisations or community-led initiatives that may, for example, focus specifically on transport needs or offer transport as one of many community support services.

Total spending on health in 2019–20 estimated to be \$81.8 billion, representing 16.3 per cent of the Australian Government's total expenditure

Australian Government, *Budget strategy and outlook: budget paper no.1: 2019–20*, pp. 5-19

Key Community Transport Innovation areas

Customer facing

Digital payments systems, online booking, wayfinding and navigation, real-time information

Fleet

Assistive technology, electric and low/zero emission vehicles, automated vehicles

Service innovation

Asset and service sharing partnerships, social enterprise innovation, Software-as-a-Service' models

Operations

Automated scheduling, route optimisation, demand responsive transport, real-time vehicle tracking, CRM tools, APIs



What are the technology benefits?

The opportunities that emerging innovations offer to make transport accessible, flexible, efficient and cost-effective are significant and will be crucial to addressing transport disadvantage and complex mobility needs into the future.

There are many positive examples of innovation in community transport services in Australia and internationally, particularly in service innovation, operations, fleet technologies, and customer-facing solutions.

The Covid-19 pandemic has been a useful catalyst for some providers to introduce new technologies, especially with the increasing familiarisation with, adaptation to and adoption of technology and digital methods to engage with or receive services by community transport customers. Covid has also presented opportunities for providers to adopt new systems such as digital 'cashless' payment systems – especially where this was seen as beneficial but may have previously been resisted by customers.

The technology and service innovations identified through the research can offer multiple benefits to the sector and its customers, including: visibility and reach; flexibility, responsiveness and resilience of services; availability, timeliness and accuracy of information; efficiency and productivity; and cost savings.

There is a strong appetite for innovation in the community transport sector, and growing recognition of the opportunities of technology as an enabler to make community transport services more visible, accessible and cost-effective.

Community transport providers that have adopted innovative solutions are seeing demonstrable benefits,

while others clearly see the potential but may be unable to realise these opportunities on their own. While strong pockets of innovation exist, innovation in the sector is uneven due to variations in scale, funding issues, viability or appetite for risk, customer barriers, staff resistance, or philosophy.

Ensuring community transport services are engaged with innovation, and supported and brought along for the ride, will be vital to leveraging the power of technology in meeting future needs. Successful innovation will depend on effective partnerships and collaboration within the sector, with other local services and with industry to develop and implement solutions that meet the complex needs of the sector and its customers.

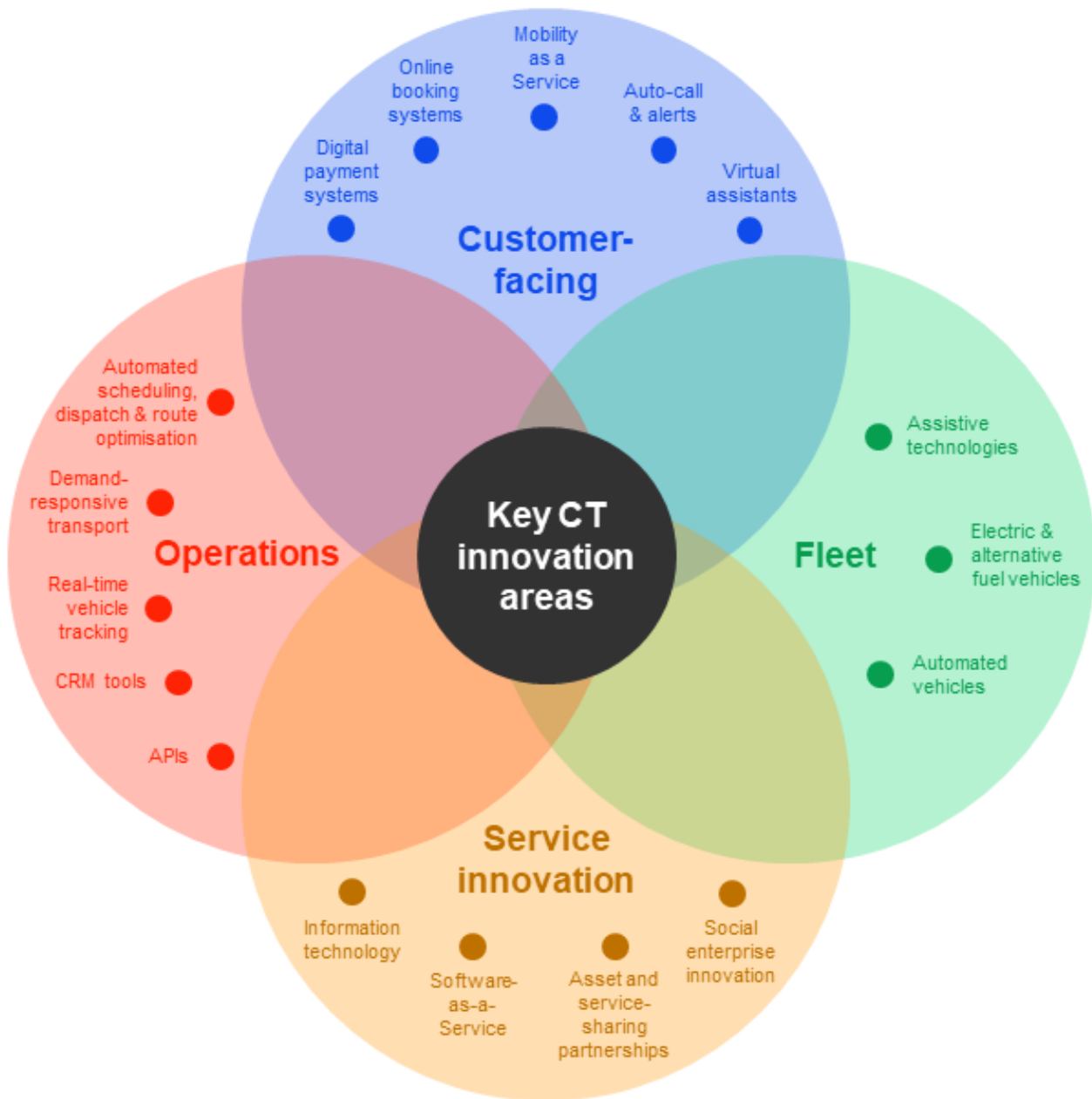
As in other areas of transport, collaboration and partnership involving community transport providers is likely to be vital in advancing innovation in the sector, especially where there are opportunities for mutual benefit.

In addition to the many examples of community transport providers already working in partnership with other local services, participants in the research highlighted a desire for partnering to explore and implement technology, involving both technology providers and other service partners to develop effective solutions.

“92% of seniors rated personal mobility as critical to health, social wellbeing, and independence”

[2020 Commissioner for Senior Victorians Report](#)

Innovation opportunities



Source: Institute for Public Policy & Governance

Funding and the future of mobility

Actual demand for community transport and assisted mobility is poorly understood. This is partly due to an overall lack of data on specific, relevant areas of community need, demand for and use of assisted mobility services. In addition, evidence that does exist is largely focused on those people already eligible for support within the context of specific funding programs.

Despite the limitations in data, there is already evidence of existing gaps and mismatches between supply and demand. For example, a 2020 analysis of the CHSP program for the Department of Health indicated that demand for transport services exceeded supply for over 13% of services. Other research has highlighted issues of unmet need for people that may need assistance to travel but do not meet the criteria for funding under programs such as the CHSP or NDIS.

The Aged Care Royal Commission's Final Report also highlights evidence of unmet needs for aged care services overall, with transport cited as a key example, as well as the overall lack of evidence on demand.

A consultation paper for the new Australian Disability Strategy 2021-2031 noted that around 85% of Australians with a disability will not be eligible for support under the NDIS and would have limited supports to assist with the high cost of living, including transport costs.

Providers engaged in the research also gave consistent qualitative evidence that, beyond the gaps in funding or provision for cohorts already eligible for subsidised transport supports, there are much broader community issues around transport disadvantage and needs for mobility assistance that go largely unmet.

Without intervention, the scale of unmet needs for transport assistance for vulnerable and disadvantage members of the community will worsen, especially with a growing ageing population with complex needs.

Challenges of fragmentation

Responses to community needs

Community transport occupies a position at the nexus of transport, health, aged care, disability, social and community services.

Many of these sectors may be increasingly working towards holistic approaches for addressing the needs of specific customer needs or demographics.

However, viewed from a transport perspective, the existing market has evolved within a context of fragmented regulatory and funding regimes across jurisdictions, policy siloes and single-purpose programs, rather than as a planned, systemic approach designed to provide equitable transport supports that are responsive to community demands.

Policy and regulation

Community transport providers are operating under a complex array of policy, regulations, standards and other obligations that apply to the delivery of services across varying customer groups and needs – particularly for aged care, disability and transport – while at the same time not typically being integrated into wider transport policy and planning.

A consistent theme emerging from interviews with service providers was the 'strong', 'heavy', 'multi-layered' or 'over-' regulation of the sector. The complex and costly administrative requirements that can be involved in providing services to customers under multiple funding programs and regulatory regimes also impact providers.

The fragmented nature of the existing system creates significant barriers to access for customers across a range of services. Customers may have difficulty navigating varying eligibility requirements and programs, finding providers and accessing services, while those experiencing transport disadvantage may also face unequal levels of support to assist them in accessing transport.

Funding arrangements

The challenges associated with a fragmented system have a major impact on funding.

The community transport sector is supported by multiple, independent funding programs many of which are designed to align funding for a variety of service types to specific eligibility criteria and user groups.

In practice, this has the effect of community transport organisations structuring themselves to align and respond to specific channels of funding aimed at particular cohorts or purposes (such as aged care and disability supports), and to provide distinct, though in many cases similar, services to each funded customer group.

A recent report by the Commissioner for Senior Victorians highlights evidence of people struggling to navigate the aged care system, identifying a need for better coordination of policies and services across government, including community transport options. At the same time, this fragmentation means service providers may face barriers in being able to offer an integrated service to meet a range of customer needs under multiple different regulatory regimes and funding programs.



This fragmentation results in funding for transport support not being aligned to a more holistic understanding of community needs for assisted mobility and creates a range of challenges including equity of access to assisted transport, funding constraints, and a lack of funding stability.

This complexity can also result in variations between jurisdictions, as variations in uptake of different programs as well as inequities in funding.

Many research participants commented on the financial pressures created by the interplay between high running costs, high administrative and compliance expenses and limited funding.

A lack of funding certainty and long-term financial sustainability was a particular area of concern for most providers, and feedback from interviewed stakeholders highlighted the extent to which community transport organisations and services depend on actively and continuously pursuing funding from diverse sources to ensure ongoing viability.

While in specific agencies the approach to funding programs may make good sense from a holistic user perspective, viewed through a transport lens this fragmentation can result in complexity, potential gaps or misalignment between government policy and funding objectives, and community needs. It can also limit scalability, viability and sustainability of services where it creates barriers to effective integration.

The fragmented nature of funding also results in an inability for providers to flexibly respond to changing demands in their communities, as funding designed to support one user group cannot typically be pivoted to support the needs of another user group.

For example, a provider receiving funding under both the Commonwealth Home Support Program (CHSP) and the Queensland Community Transport Program (CTP) would not be able to re-direct unspent funds from their CTP grant to provide transport to a customer over the age of 65 after their CHSP funding had been exhausted, or visa versa.

Varying conditions attached to funding around how and where funding can be used and the extent to which funding can or cannot be used to cover the full range of costs associated with service delivery also limits flexibility and can constrain the capacity of providers to flexibly respond to demand in their local community and invest funding efficiently.

The CHSP, for example, currently contracts providers to deliver services within a specified Aged Care Planning Region, which places constraints on where providers can operate.

Whilst these Regions are quite large in rural and remote areas, they can be small in metropolitan areas and could be restrictive for providers. Several major programs also place conditions on how funding can be used, often only to cover the costs of delivering service outputs (i.e., trips), such as for fuel, wages or supporting technologies.

Programs frequently place constraints on the use of funding to pay for or invest in assets (e.g., vehicles or depots), which can limit the ability of community transport providers running asset-intensive operations to operate efficiently.

Another challenge emphasised by research participants was the short-term nature of funding arrangements associated with major Commonwealth programs. For example, contracts under the CHSP's current block funding model typically do not extend beyond a period of two years.

While this offers some short-term certainty it does not allow for more strategic mid- to long-term planning. As with other transport organisations and capital-intensive sectors, short-term funding and a lack of funding certainty creates significant challenges for providers in their ability to plan ahead, adopt more efficient long-term approaches to managing assets and operate cost-effectively.

Challenges for providers around the ability to fund substantial capital and infrastructure costs, such as vehicle fleets, under current grant funding arrangements was specifically highlighted by the Aged Care Royal Commission as a key reason for recommending a new social supports category of grant funding in the Commonwealth aged care program.

Qualitative evidence from community transport providers indicates that the costs of providing services outstrip public funding and are rising faster than increases in funding, while there are also concerns around funding models that are based on per-trip funding, including assumptions in funding programs about the flat-rate cost of trips.

For example, the planned changes to CHSP in 2022 will include changes to payment arrangements and the introduction of a fixed national unit price range (\$18 - \$36 per one way trip) and only allow providers to apply loading if they deliver the majority of their services in remote or very remote areas.

Emerging changes to the market, including anticipated funding reforms (particularly the shift from block grant to person-centred funding in the aged care sector) and an evolving ecosystem of innovative and diversified mobility services, are expected to increase competition. While these changes may create opportunities for customers and providers, there are also potential risks for the future viability of community transport services, quality and safety standards, regulatory oversight and compliance.

For people over 85 years old, the population in major cities alone is expected to grow by more than a third (36.3%) with growth progressively higher in more remote areas.

An evolving market for services

Beyond present challenges in community transport, the context for the sector is also changing, introducing new challenges in terms of increased competition and less certainty over demand and funding.

Major developments include Commonwealth policy and funding reforms in aged care, following the recent Aged Care Royal Commission, as well as an evolving wider transport and mobility service ecosystem with the emergence of innovative technologies and a range of new, diversified mobility service models and providers (such as ride-share).

Changes to funding arrangements

The biggest area of concern among providers related to planned Commonwealth reforms to aged care in the wake of the Royal Commission into Aged Care Quality and Safety report published in February 2021. On 11 May 2021, the Department of Health announced that in July 2023 a new Support at Home Program will replace all relevant aged care programs, including the CHSP.

Of specific concern to the community transport sector is the proposed shift away from contract-based block grant funding towards a more person-centred funding model, like that which operates under the NDIS, was cause for concern among many providers.

Many of the major programs that support the provision of community transport, such as the CHSP and state CTPs, currently subsidise services based on a block grant funding model. This provides a 'block' of funding, typically up front, for delivery of a target number of services over a set time period, with providers required to meet certain conditions or standards of service. Any unspent funds are then recouped by the funding agency through an acquittal process.

Block funding models are regarded by some as necessary to guarantee the continued supply of high-quality services, especially in what may otherwise be a market failure situation, while they can also provide valuable certainty and stability of funding and a degree of autonomy that can facilitate the efficient delivery of services. However, others contend that the model reduces the self-determination of customers and is an inefficient means of distributing public funds.

In contrast, person-centred funding models direct funding to individuals rather than to service providers. These models represent more market-based approaches to funding, aiming to improve individual customer control and choice over how funding is spent, increase the availability of and competition between subsidised services, and reduce the overspend of public funds.

However, these models are also considered by some to be a threat to smaller providers in the sector, to exacerbate existing administrative burdens, and may reduce customer choice in certain circumstances.

In addition, while competition can be an important driver of efficiency and innovation in many parts of the economy, in areas where there are extensive market failures (such as healthcare) competition is not always effective at achieving the desired benefits.

Examples of major concerns raised in interviews included reduced certainty of funding (with implications for the ability of providers to manage assets and deliver services efficiently), potential risks associated with a competitive market-based funding model (including a weakening of quality standards and controls, reduced consumer choice and greater inequality of access), higher administrative costs, risks of disadvantaging smaller providers, and the future sustainability of services.

Evolving mobility services

The wider transport sector is also undergoing extensive change with the emergence of new forms of mobility and technology-enabled service models, such as ride-share, on-demand transport and Mobility as a Service.

These innovations and resulting diversification of transport services and choices are changing supply-side dynamics in the transport market, and potentially offer new opportunities to serve the needs of people that experience transport disadvantage (including those who may have previously relied on community transport).

Some interviewed stakeholders – including user groups and industry organisations – pointed to the positive impacts of technology in facilitating easier access to more mainstream transport services, such as on-demand or ride-share, indicating that digital tools and increased visibility of services may attract customers where those services can meet their needs.

At the same time, these innovations have implications for the future role and integration of community transport within an increasingly diversified and interconnected transport ecosystem.

The major perceived risk for providers involves other services taking over community transport customers with less complex needs and lower costs of service, leaving community transport providers to only service trips for people with more complex needs that require higher standards of care and involve higher delivery costs.

This raises questions over the applicability of and compliance with aged care, disability or other regulations and quality and safety standards and could also make it impossible for community transport providers to remain financially sustainable. By extension, this could leave the most vulnerable in society that depend on the level of care and support from community transport services without a viable transport option.

Quality and safety compliance

In an inherently high-risk category of service involving many forms of vulnerable user in relatively uncontrolled environments, it is appropriate to establish a range of quality and safety standards, duties of care, clinical supports and other specific requirements for the provision of community transport and equivalent services. These include standards and regulations overseen by the Aged Care Quality and Safety Commission, the NDIS Quality and Safeguards Commission and transport regulators in States and Territories.

However, in practice the multi-layered regulatory environment creates challenges for providers in complying with a complex array of obligations and standards, as well as high compliance and administration costs. Smaller, community-based not-for-profit providers with few resources may find it especially difficult to comply and bear the costs involved given the combined extent of requirements. Some providers may therefore choose to 'opt out' of serving some customer cohorts.

Providers emphasised the high regulatory load associated with regimes attached to individual federal funding programs, such as the CHSP and NDIS, and the separate registration, standards, contractual and reporting requirements for each of these – as well as the added complexity of state regulations, programs and requirements. At the same time, other evidence shows that existing systems for monitoring compliance in areas such as aged care are generally ineffective and in need of reform.

Workforce challenges

Within the community transport sector, as with most organisations staffing represents a significant source of operating costs. The significant levels of training required for staff providing services and care to customers in the context of quality and safety standards and obligations are also a major cost.

Several providers engaged in interviews and workshops highlighted workforce challenges facing the sector, including high levels of staff turnover that results in lack of continuity in terms of skills and training and impacts the connections formed between providers and customers that are a key part of the care relationship.

While volunteers play a vital role in delivering community transport services, the sector's reliance on volunteers also brings challenges. For example, recruiting and retaining a sufficient pool of volunteers can be difficult for many providers, particularly due to many volunteers being older and reaching a point where they are less willing or able to continue. Reliance on a volunteer-heavy workforce can also limit the capacity of individual providers and the sector as a whole to pivot or gear up for shifts in demand.

The transition from block funding to person-centred, individualised funding across various sectors (including reforms to aged care funding) also may potentially increase certain risks around quality and safety standards.

For example, a move away from contractual arrangements for services to a competitive market may decrease mechanisms for regulatory oversight. Funding limitations faced by providers already create challenges around managing assets, such as vehicle fleets, and a lack of funding certainty and individualised funding models may compromise vehicle quality and safety standards and fail to take account of capital costs required to acquire, modify, maintain and renew vehicle fleets.

Individualised funding arrangements may result in customers in need of assisted transport using mainstream transport providers to provide trips. As some community transport sector participants in the research noted, under person-centred market-based funding models many customers are primarily concerned with the price of services rather than necessarily being willing to pay for additional service or quality.

The shifts in funding and supply-side dynamics, issues around maintaining and improving quality and safety standards, and challenges of growing demand for assisted transport presents both challenges and opportunities for the community transport sector.

It also makes the future marketplace for assisted mobility uncertain, with an important role for governments in monitoring how this evolves and intervening to safeguard standards and address potential market failures.

A diverse and disaggregated sector

The community transport sector has many providers, operating in different locations and ranging from small community-based not-for-profit organisations to large providers with substantial fleets covering wide service areas.

This diversity and disaggregation creates challenges for the sector's visibility, ability to act cohesively and strategically, advocate for itself and speak with a strong, unified voice about its issues and priorities. It may equally make it harder for other stakeholders, such as government agencies, to understand and engage effectively with the needs of a diverse and disaggregated community of operators.

While many of the providers interviewed already worked in partnership with other health, transport or community services, some respondents highlighted struggles in forming these partnerships because "they don't know we exist."

Others saw both missed and future opportunities for establishing better connections and partnerships with different parts of the transport sector and improving the integration of community transport with other forms of public transport, as well as with other services and community needs.

One example referenced related to COVID-19 and the vaccine roll-out, where more than one community transport provider highlighted the sector's front-line position and willingness to help with the pandemic response but came up against a lack of communication and inability to find ways into government to collaborate.

Innovation challenges

The nature of the sector, its customers and the fragmented ecosystem it operates within create a variety of potential barriers to innovation.

Funding and resources

One of the most prominent barriers to innovation for community transport providers was funding – including an overall lack of funding, but also a lack of funding certainty and flexibility, and the high costs associated with implementing new technologies. These mean the costs and risks of implementing new technology can be prohibitive for providers and makes it difficult for individual providers, and the sector, to operate efficiently and engage with innovation and new technologies.

Challenges of scale

Many community transport providers are small compared to most mainstream transport service providers, typically dealing in far smaller volumes in terms of customers and trips. On their own, most providers will often lack the necessary scale to make investing in technology cost-effective.

Sector capacity and readiness

The research suggests varying capacity and readiness for technology adoption within the community transport sector. Stakeholders described perceived cultural and attitudinal barriers to innovation and change among some community transport organisations and staff, while some providers may only have adopted technology because of requirements to do so which has led to some viewing new technology as an additional compliance burden rather than an improvement or solution. Barriers for providers can include the need for intensive upskilling to implement new innovative technologies, which may be particularly challenging with a volunteer workforce.

Customer barriers

Some research participants suggested a relatively high level of customer readiness and appetite for innovation solutions, while others also noted barriers around customer readiness and challenges around technology adoption. However, there are still significant accessibility or other customer barriers that will mean the introduction of new technologies will not necessarily be able to meet all needs. 471F

Perceived customer resistance or lack of readiness for new technology is one issue, including customers without access to smartphones or unwilling to pay using credit cards. Other barriers related to customer needs, where technology may not be suited to certain customers for example due to a physical or a cognitive impairment or require additional support for customers to be able to use the technology.

Technology solutions not aligned to sector needs

The multi-layered complexity of regulatory compliance, reporting and administrative requirements for providers can be constraining and limit the flexibility to innovate.

For example, providers may have to adhere to prescriptive templates or technical specifications that may constrain technology solutions. Some contracting arrangements have also previously had prescriptive technology requirements.

Some providers also cited previous negative experiences in implementing technology solutions that only offered 'one-size-fits-all' solutions or were not fit-for-purpose for the unique needs of the sector, often resulting in failed implementations, financial losses and frustration among staff, which may make some hesitant to invest in technology.

Opportunities for Innovation

Key findings for strategic innovation

Key finding:

Transport disadvantage is a complex and growing problem, but significant data and evidence gaps exist on current and future community needs associated with disadvantage, which need to be addressed to inform more holistic and responsive strategies

UNDERSTANDING NEEDS

Opportunity to pursue research and data-driven insights to provide more meaningful, ongoing data and strategic evidence on transport disadvantage and changing needs. This would include for key existing community transport user groups as well as other groups that may currently fall outside of dedicated policies, programs or eligibility for funded support.

Opportunity to use this evidence to better inform and enable proactive whole-of-government assessments of strategic options for meeting community needs for transport support that can better address existing gaps and are responsive to changes in demand (as well as an understanding of the system costs of not meeting these needs).

Key finding:

Emerging changes to regulation and funding (e.g., in aged care), as well as the wider mobility market, creates potential risks that will require active monitoring

MARKET OVERSIGHT AND STEWARDSHIP

Opportunity to proactively put in place the means to identify, assess and respond to potential risks of an evolving competition-based market for community transport services, such as service gaps, variable service quality and safety standards and compliance, and emerging market failures. Options may include, for example, developing outcome-based approaches for monitoring the performance of the sector.

Key finding:

The fragmented ecosystem creates systemic challenges to an effective market – many customers experience barriers to access services, while providers face challenges in complying with multiple regulatory regimes and offering integrated services

Opportunity to explore potential government-led policy and/or technology options that could be promoted or applied at a system-wide level to:

- Enhance customer awareness, visibility and reach of community transport services
- Streamline customer access to services and integrate available supports to reduce barriers and pain points
- Modernise services and lift standards

Key finding:

There are currently highly fragmented approaches to policy, regulation and funding of services across policy siloes and levels of government to address similar customer needs for assisted mobility

POLICY COORDINATION

Opportunity to strengthen policy coordination, collaboration and information sharing across state and territory government agencies to facilitate and ensure joined up policy responses to intersecting customers and issues associated with transport disadvantage and assisted mobility within each jurisdiction.

Opportunity for more integrated approaches within states and territories to provide a holistic policy platform on all aspects of transport disadvantage for policy engagement with other jurisdictions and the Commonwealth Government. For example, opportunities to better coordinate and integrate issues around mobility as part of strategy and reforms recommended by the Aged Care Royal Commission to develop integrated systems for long-term support and care of older people.

Key finding:

Service providers (and technology solutions) are often structured to respond to fragmented policies, programs and regulatory requirements, which increases regulatory complexity and prevents delivery of efficient and integrated services to customers

Opportunity to explore development of a standardised framework of assisted mobility needs and transport services to provide a consistent, streamlined categorisation of user needs across different service types. This may help in enabling:

- Clarity from a policy perspective around the scope for different needs to be appropriately met by different type of transport service, and inform approaches to regulation of services
- Certainty for providers around applicable regulatory requirements, standards and eligibility assessment in serving different user types and needs, with the potential ability to integrate services/supports and streamline compliance and administration across multiple programs
- Certainty and consistency for wider industry in developing technology solutions that can underpin more streamlined, integrated approaches to service delivery and administration.



Key finding:

Transport disadvantage is complex, cuts across numerous policy areas and lacks a specific focal point. This also means community transport struggles to engage effectively with government

GOVERNANCE

Opportunity to explore governance options within jurisdictions that can support policy coordination across agencies, and better engage and give a stronger voice to key transport disadvantaged user groups and community transport service providers, to inform policy development.

Jurisdictions could examine a spectrum of options ranging from regular, structured stakeholder engagement through to a dedicated entity that can provide strategic focus on the complexity and cross-sectoral challenges of transport disadvantage – for example, such as a Commissioner for Transport Disadvantage (similar to Mental Health Commissioners), which could focus on issues such as:

- Customer protection: Safeguarding the rights of transport disadvantaged people to access safe, high quality transport services
- Coordination and collaboration: Coordinating policy, funding and regulatory responses across siloes
- Technology solutions: Bringing together customers, service providers and technology providers to facilitate collaborative technology solutions
- Workforce planning: Addressing future workforce challenges for community transport and building capacity and readiness of the sector for technology
- Data and performance: Overarching monitoring and reporting on the performance of sector

Key finding:

There is very limited understanding of the current costs and benefits of service delivery and how this may impact future viability of services to meet community needs under current policy and funding settings

FUNDING

Opportunity to address the current gap in evidence and understanding of the costs and benefits of service delivery of community transport in different settings (e.g., metro, inner/outer regional and remote).

Opportunity to use improved evidence on costs and benefits to inform evidence-based assessments of potential system costs of addressing (or failing to address) community needs, identify funding gaps/needs and potential cases for policy action or investment to meet current and future community needs.

Funding arrangements for CT and assisted mobility more broadly are highly fragmented within policy siloes

Opportunity to explore the potential to align/consolidate disparate funding streams between different agencies (e.g., within or across states and territories) where this can maximise efficient use of funding or integration of delivery across programs and user needs.

Key finding:

Community transport providers run asset-intensive operations but generally face a lack of certainty and stability of funding (expected to worsen under proposed aged care funding reforms), which makes it hard to operate efficiently and limits scope for innovation

Opportunity to explore innovative policy and funding mechanisms within jurisdictions that could support the community transport sector to improve opportunities for efficiency and innovation.

This could include a range of options, such as:

- Exploring state and territory funding options that allocate funding to providers on a contractual basis over longer (3-5 year) terms, potentially linked to/consistent with regional, place-based approaches to transport service provision
- Exploring the scope for greater financial flexibility for providers over the use of grant monies (e.g., enabling funding to be used towards asset or technology costs)
- Exploring options to establish state-wide coordinated models for procurement or management of transport assets (e.g., vehicles), co-development of technology solutions or access to capital for providers. This may particularly benefit smaller providers that lack scale by aggregating needs, de-risking investment and enabling economies of scale

Key finding:

People experiencing transport disadvantage and complex mobility needs are an increasingly large part of the transport customer base – and catering for these customers' needs to be better integrated into transport planning and system design at all levels from the start, including considering the role of community transport as part of integrated solutions

Personalised transport services matching customer need based on shared user data and fleet and staff routing algorithms

INCLUSIVE APPROACHES TO INTEGRATED TRANSPORT

Opportunity to recognise more explicitly that a major and growing proportion of transport customers will comprise people experiencing transport disadvantage and complex needs, and factor this into strategic transport policy and planning responses that embed these into the design of the transport system from the start, rather than as a 'bolt-on', and accelerate efforts towards the universal design of public transport services.

Opportunity to improve regional and local place-based planning of transport and other infrastructure and services to be inclusive of customers with complex needs and disadvantage and actively consider and integrate community transport services as part of the solution mix.

Opportunity for digital transport services and platforms to integrate data about individual customer mobility assistance needs as well as community transport services. This could support transport matched to specific customer needs. This will require a level of technological maturity and data security / privacy compliance on behalf of operators, digital platforms and customers.

Key findings for service-level innovation

Key finding:

Innovative mobility services and technologies could increasingly complement public and community transport in helping address unmet needs linked to transport disadvantage

EXPLORING FUTURE MOBILITY AND TRANSPORT DISADVANTAGE

Opportunity to harness emerging transport innovations such as flexible, on-demand transport and Mobility-as-a-Service to enhance the visibility, choice, reach and integration of transport options for a wider range of customers with less complex mobility needs, especially where these can offer more efficient and cost-effective approaches relative to other forms of public transport.

Opportunity for government and industry to work in partnership, and with the community transport sector, to apply innovative transport technologies or services (such as flexible on-demand public transport, MaaS or automated vehicles) to specific use cases around transport disadvantage. This will help to test and develop learnings on the potential effectiveness and future role for these innovations to contribute to reducing transport disadvantage.

Key finding:

The community transport sector is diverse and disaggregated, with varying levels of scale, revenue, capability and readiness for change, including in responding to an evolving market context and in pursuing innovation

Opportunity for greater collaboration within the community transport sector, for example to:

- Explore mechanisms to facilitate and strengthen information and knowledge sharing between providers and across jurisdictions
- Build collective sector capacity around managing and responding to emerging change in the sector as well as harnessing innovation and implementing technology
- Explore opportunities for collaborative procurement around transport assets, technology solutions or staff training to aggregate needs and leverage combined scale to improve cost-effectiveness

Opportunity for greater collaboration between technology providers and the community transport sector to explore opportunities for technology to enhance operations, service delivery and customer experiences. This includes exploring partnership arrangements that allow for the sharing of risk and co-development of solutions that respond to the range of diverse and complex needs of the sector and its customers.

Opportunity for community transport providers to proactively respond (in a gradual way) to a changing market and funding context, for example by identifying opportunities for growth and diversification (such as expanding areas of operation or diversifying services).

Key finding:

Technology and service innovation offers a variety of potential benefits to community transport and its customers, but face a range of internal and external barriers to innovation and may depend on collaboration and partnerships within and beyond the sector to capitalise on these opportunities

Opportunity to capitalise on digital technologies that can improve efficiency and productivity, streamline compliance and administration, reduce costs and improve the quality and responsiveness of services. Technology solutions can also facilitate the integration and aggregation of mobility needs and services across community transport, other mobility solutions and other local community services.

For example, the community services sector more broadly already recognises the opportunity to embrace and engage in digital transformation to exploit benefits rather than being “left behind”, and the sector is exploring open data platforms to link demand and services to better target service delivery.

Opportunity to form local partnerships or networks across community transport and other local health, social and community-based services, to integrate and aggregate assisted mobility and transport supports and improve quality and efficiency of services.

For example, this could include coordinating the assessment of eligibility and provision of services, as well as exploring opportunities to share assets, costs, resources, functions and budgets. It could also include leveraging partnerships with other types of highly visible local service providers to attract volunteers.

Key finding:

Government and/or industry could facilitate conditions for innovation, e.g providing greater flexibility on use of grant funding, facilitating aggregation or coordinated procurement

Opportunity for government and/or industry to help create the conditions for innovation in community transport. In addition to options already identified elsewhere (such as providing greater flexibility on use of grant funding, facilitating aggregation or coordinated procurement), other possible options might include:

- Exploring further opportunities to minimise or streamline regulatory barriers to innovation, including providing guidance to service providers on navigating red tape, as well as promoting outcome-based and technology-neutral regulatory approaches that avoid stifling innovation
- Considering the need to ensure interoperability of data or systems where this is required to facilitate sector innovation, service integration and the ability to generate system-wide insights
- De-risking innovative solutions, for example through sharing evidence of benefits, sharing information and case studies on key success factors and potential pitfalls around implementation
- Working with the sector to help build capacity and strategic readiness for technology within the sector and across key user groups
- Exploring options to broker collaboration, partnership and risk-sharing between community transport and technology provider.

Next steps

As a community-based service that has developed and evolved organically in response to policy reforms and funding programs, the research highlighted a range of existing and emerging challenges facing the community transport sector, which also impact the effectiveness of broader strategies for tackling transport disadvantage.

Key issues include:

- A limited strategic understanding and evidence base around transport disadvantage, current unmet demands and future needs
- Siloed, rather than systemic and coordinated, responses to transport disadvantage, which creates barriers to access for customers as well as barriers to efficiency, integration and innovation for community transport service providers
- An evolving operating context, with policy and funding reforms heralding increased market-based competition, together with wider changes and innovations in the transport and mobility market. These changes bring a range of opportunities but also potential risks to future choice, availability and viability of services, as well as regulatory implications for ensuring standards are maintained and improved
- A diverse and disaggregated community transport sector that will need to adapt to meet these challenges, but which alone is not able to overcome more systemic barriers and issues that require higher-level intervention.

The previous section outlined in detail priority areas to be explored individually and in collaboration by government, service providers and wider industry, an overview of the key focus areas and opportunities for next steps include:

Opportunities for systemic innovation: to explore more holistic approaches to tackling transport disadvantage, including more integrated approaches to planning, funding and services within and across sectors, and

Opportunities for service-level innovation: to explore ways to harness the benefits of, and create the enabling conditions for, technology and service-level innovation within the community transport and wider community services sector.

Taken together, these opportunities emphasise that the future of community transport:

- Should be viewed as an important and integrated component of a systemic response to transport disadvantage and associated community needs
- Can be strengthened by more coordinated and innovative approaches to policy, funding, planning and service delivery
- Can benefit significantly from technology and service innovation, where community transport providers individually and collectively can step up to current and emerging challenges, facilitated through effective collaboration and partnerships.

1

Opportunity for greater collaboration between technology providers and the community transport sector to explore opportunities for technology to enhance operations, service delivery and customer experiences.

2

Explore partnership arrangements that allow for the sharing of risk and co-development of solutions that respond to the range of diverse and complex needs of the sector and its customers.

3

Engage with the Community Transport and Technology working group convened by ITS Australia to continue investigating opportunities for technology and develop potential pilots or trials.



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