

3. The Market for Transit

3.1 Visitors

3.2 Commuters

3. THE MARKET FOR TRANSIT

This chapter will examine the market for an improved public transport system to serve the Central National Area of Canberra. It will focus on two significant elements:

- visitors wishing to visit the area's main attractions; and
- commuters who work in the vicinity of the Central National Area (CNA), especially within and adjacent to the Parliamentary Zone.

3.1 VISITORS

As the National Capital, Canberra attracts large numbers of tourists each year. It is one of the top ten tourist markets in Australia. Statistics produced by the Bureau of Tourism Research (BTR) show approximately 4 million visitors are attracted to Canberra annually, with about half of the total being day-trippers. (Canberra Tourism and Events Corporation (CTEC), 2000)

The BTR's National Visitor Survey estimated that 1.998 million Australians visited the ACT and stayed for a minimum of one night during 1999. A further 1.806 million day trips were made by domestic visitors over the same period. (CTEC, 2000; BTR, 2000a)

Of international visitors to Australia, about 174,000 spent at least one night in the ACT in the year ended 31 March 2000. (BTR, 2000b) Data concerning international day-trippers is unavailable but anecdotal evidence from CTEC (2000) and key attractions such as the National Capital Exhibition suggests that Canberra is a popular day trip for international tourists based in Sydney.

The day-tripper market is a very important component to the Canberra tourist industry. Canberra's close proximity to Sydney and the city's well promoted 'event' attractions, such as the annual Floriade Festival and touring art exhibitions associated with the National Gallery of Australia, which target short-term visitors, can result in visitor numbers to the city topping 80,000 a week. (Canberra Times, 2000e, p 22)

Of the total 3.8 million domestic visitors in 1999, almost 39 per cent nominated that their primary reason for visiting was for holiday or leisure reasons; 28 per cent came to visit friends and relatives; and 25 per cent for business. (CTEC, 2000) Given the high incidence of leisure related travel it would be probable that a significant proportion of travellers spent at least some time in the Central National Area. Even the business sector would be likely to generate considerable trip activity to Parliament House and nearby public and private sector offices.

Data from overnight international visitors in 1998 show they were generally visiting Canberra for holiday and leisure purposes (63 per cent), with 15 per cent visiting friends and relatives. (ABS, 2000b, pp 145-146)

Visitors to National Institutions and Attractions

Table 3.1 shows that Parliament House, with some 1.139 million visitors in 1999, is by a fair margin, the most popular national attraction in the ACT. It is followed by the Australian War Memorial with 0.853 million visitors and the National Gallery of Australia with 0.472 million visits.

TABLE 3.1 - VISITORS TO MAJOR CANBERRA ATTRACTIONS (a)

Attraction	1997	1998	1999
Parliament House	1 176 818	1 161 323	1 139 366
Australian War Memorial	812 810	679 357	853 405
National Gallery of Australia	411 709	481 034	# 471 805
Telstra Tower	369 201	348 793	346 993
Australian National Botanic Gardens	325 024	352 749	320 728
National Capital Exhibition	376 120	351 636	317 572
Old Parliament House	129 299	132 379	180 208
National Library Exhibition	53 375	51 449	+ 123 882
High Court of Australia	128 897	109 334	108 708
National Science & Technology Centre	302 705	292 155	* 105 237
Screen Sound Australia	86 551	87 710	83 225

a: - including ACT residents # Jan to Nov only + incomplete * Jan to June only

Source: Canberra Tourism and Events Corporation, Canberra Visitors Surveys (from ABS, 2000b, p 149)

The collective total of visits to these attractions in 1999, which are all located within the Central National Area, was in excess of 4.051 million. It must be noted, however, that this figure, which includes ACT residents, represents the cumulative total of visits to each attraction - and that visitors are likely to visit more than one attraction during their trip.

The data shows that the Parliamentary Zone, which contains six national attractions (Parliament House, Australian National Gallery, Old Parliament House, National Library, High Court of Australia and the National Science & Technology Centre) accounted for a little over half of the total with 2.129 million visits recorded in 1999.

Visitor numbers for the National Archives Exhibition, which is also located within the Parliamentary Zone, were unavailable.

Significant investment is being made by both public and private sectors in upgrading the tourism infrastructure in Canberra. Major public works completed recently includes the extensions to the National Gallery of Australia; the refurbishment of East Block for the National Archives of Australia, the expanded National Capital Exhibition at Regatta Point; renovations and extensions at the Australian War Memorial; and additional memorials along Anzac Parade.

The largest single project is the new \$152 million National Museum of Australia which was completed in March 2001. It has been suggested that this facility alone could draw an additional 500,000 visitors annually. (Canberra Times, 2000e, p 22).

The celebrations in Canberra associated with the Centenary of Federation during 2001, with the possibility of completing the initial stage of the planned Commonwealth Place development at the Lake edge of the Parliamentary Zone would have a major impact on boosting visitor numbers.

Tourism based on events such as the well established annual Floriade Festival are likely to be joined by new visitor attractions such as the GMC V8 Supercars race which was held for the first time in Canberra in June 2000.

In the longer term, emerging initiatives such as a National Aerospace Centre, to be located within the Parliamentary Zone, and tourism oriented foreshore redevelopment at nearby

Kingston, will serve to further enhance the CNA as the focal point of tourist and leisure activity in Canberra.

Ensuring easy and efficient access to all these new attractions will require planning for visitor growth and supporting transport strategies. As the local press observed recently "...the growth of national buildings, the museum and the Kingston Foreshore Development combine to boost the lake as a new focus for leisure activities and as a transport node. Most of the national attractions are walking distance from a lake jetty." (Canberra Times, 2000e, p 22)

At present transit access to the Lake and its nearby attractions is poor. Of particular concern is the paucity of vessels servicing tourist needs around the Lake.

The completion of the dual carriageway road between Sydney and Canberra, which has reduced the travel time between the cities to little more than three hours and the ongoing upgrading of Canberra International Airport will serve to enhance the accessibility of the National Capital for visitors, particularly day trippers. Should the proposed fast rail link between Sydney and Canberra proceed, with travel times of around 80 minutes, the total visitor market is likely to grow enormously. Visitors arriving by rail would require frequent and convenient transfers to the city and major attractions - a task most suited to a public transit system.

Transport used by visitors in Canberra

1998 data show that most (74 per cent) of domestic overnight visitors to Canberra arrive by private vehicle and about 16 per cent by air. (ABS, 2000b, p 145) The heavy reliance on cars was even greater for domestic day-trippers at almost 87 per cent of visitors. (CTEC, 2000) Mode of transport data for international visitors to Canberra was unavailable, but anecdotal evidence suggests that group coach tours and hire cars play a significant role. (CTEC, 2000)

Two recent surveys, although limited in scope and sample size, provide some additional insight into visitor travel behaviours.

A sample of 201 people, including about 80 from overseas, who visited the National Capital Exhibition at Regatta Point in October 1999 showed that 43 per cent used a private car and 42 per cent used an organised coach tour to access the attraction. About 4 per cent of respondents walked and a similar proportion nominated public transport. (National Capital Authority, 1999b) The low use of public transport may also reflect the withdrawal of ACTION bus services to Regatta Point in early 1999.

Initial results from the Canberra 2000 Visitor Satisfaction Study (first quarter - January - March 2000) are also a useful guide. Based on 355 respondents surveyed by the Canberra Research Centre for Tourism (CRC) at various tourist sites, it showed the majority of visitors used a private car for their main mode of transport (75 per cent); while a further 7.6 per cent used a hire car. Taxi was nominated by 7.1 per cent; and public bus 5.7 per cent with only 0.8 per cent using a 'tour' bus. Interestingly, some 21 per cent of the sample said they used public transport at some point during their stay in Canberra, perhaps indicating its potential to capture a much larger market share. (CRC, 2000, p 8)

Of the 26 per cent of visitors who said that they participated in some form of tour, most undertook a 'Parliamentary Sights Tour' (19.7 per cent) or a 'City Sights Tour' (4.2 per cent). The former group is less indicative of transport mode choice as it also includes conducted in-house tours such as those available to visitors in Parliament House and Old Parliament House. City Sights Tours were primarily coach based tours. (CRC, 2000, p 6)

In summary, the limited data available shows a very low level of use of public transport. While this is indicative of the popularity and flexibility afforded by the car it may also reflect the lack of suitable alternative mode choices available to visitors. Where frequent and affordable public transport options are not readily provided, potential visitors who do not have access to a car may simply choose other destinations or leave the city earlier than intended because of the constraints on accessing attractions and the high costs associated with having to purchase private transport (such as hire cars) or coach tours.

3.2 COMMUTERS

Employment location has been a major element in the strategic planning of Canberra. Both the National Capital Plan and the Territory Plan provide for dispersed employment, with a hierarchy of nodes based on Civic, the town centres (Woden, Belconnen and Tuggeranong) and at some group centres such as Dickson. Overlaid on that pattern, planning provision has been made for the central Commonwealth departments and agencies to cluster in key locations within the CNA. The Defence portfolio, for example is based at Russell, with a workforce of around 5,000. (ACT Planning & Land Management, 1998, Table 2)

The Parliamentary Zone provides for employment associated with Parliament House; key Commonwealth administrative functions such as Treasury and Finance as well as most of the national institutions. In the adjacent precincts of Barton and Forrest where total employment has grown rapidly in recent years, there is a mix of public and private sectors. It reflects the trend for major Commonwealth departments and agencies, the business sector and national associations to relocate to sites within close proximity of Parliament House.

Quantifying the potential commuter market for these areas with any degree of precision is difficult as the latest location based employment data dates from the 1996 Census of Housing and Population. It showed that 14,000 people were employed in Parkes/Barton. (ACT Planning & Land Management, 1998, Table 2) In the period since that survey, total employment has been subject to significant change due to changing public sector employment policies, including staff shedding and outsourcing; government agencies relocating into the area (such as the Department of the Environment & Conservation relocating to Parkes; the Department of Foreign Affairs and Trade to Barton; and the Department of Communications, Information Technology and the Arts to Forrest); as well as an expanding private sector.

While acknowledging the limitations of the methodology (including the omission of all private sector employment) the author has assembled data which is indicative of public sector employment in both the Parliamentary Zone (Parkes) and Barton/Forrest as at 30 June 1999 at Table 3.2. The overview is based on published data from the Commonwealth's Public Service and Merit Protection Commission (1999) and annual reports of the various agencies and institutions located in areas concerned. Table 3.2 should be used with caution as some of the data presented is based on estimates or extrapolation.

A greater measure of certainty is assumed in calculating total employment within the Parliamentary Zone due to the highly prescriptive nature of the land use policy in force in that area. The National Capital Plan provides for a land use policy of 'National Capital Use' within the Zone. This policy effectively permits only *public sector* activity of national significance. Nevertheless not all employment is recorded in the public sector sources. The diverse labour requirements associated the Parliament and the Institutions in particular, ranging from consultants, caterers, and casual staff, to voluntary guides and explainers can significantly distort (expand) the total employment numbers. Unless otherwise stated, these workers are not included in Table 3.2.

TABLE 3.2 - PUBLIC SECTOR EMPLOYMENT IN PARKES AND BARTON

Location: Parliamentary Zone (Parkes)	Number of staff employed as at 30 June 1999*
National Library of Australia	450
Dept of Environment & Heritage	1 175
Dept Finance & Administration	1 241
- Australian Electoral Commission	178
Parliament House	
- House of Representatives	183
- Joint House	248
- Parliamentary Library	162
- Parliamentary Reporting Staff	270
- Senate	203
- Other (incl Parliamentary staff, etc)	2 400 (sitting days)
High Court of Australia	50 (est)+
National Archives	200 (est)+
National Gallery of Australia	177 (plus 83 temps and casuals)+
National Science & Technology Centre	76 (plus 210 casuals/explainers)+
Old Parliament House/NPG	50 (est)+
Treasury	485
Total Parliamentary Zone (PZ)	7 548
Barton/Forrest (B/F)	
Agriculture/Fisheries/Forestry Aust	1 938
Attorney-General's	1 384
- Office of Parliamentary Counsel	46
Dept Communications, IT & the Arts	1 009
Dept of Foreign Affairs & Trade	1 878
National Capital Authority	70
Dept Prime Minister & Cabinet	428
· Australian National Audit Office	285
· Public Service and Merit Protection Commission	112
Total Barton/Forrest	7 150
Total - all PZ & B/F	14 698

Includes all full & part time permanent staff; but excludes all temporary staff; consultants; contractors.
estimated by Parliament House Information Service; + estimates derived from 1998/99 Annual Report of respective institution

Source: Public Service & Merit Protection Commission (1999), Table 10, p 31

Perhaps the most noteworthy example occurs at Parliament House, where the average workforce of 1,800 people on a non-sitting day, almost doubles to 3,500 on sitting days with the influx of large numbers of personal and support staff to serving the Members and Senators.

While the departments and agencies located within Barton also engage non-public sector personnel (for example to provide outsourced information technology services), the extent of such employment is not known.

As noted above Table 3.2 is intended to give an indicative overview of the employment position within the areas nominated. The rapid restructuring of the Australian Public Service in recent years has led to Commonwealth departments and agencies adopting much more flexible staffing regimes. As a result there are more likely to be fewer permanent employees, more temporary staff and significant outsourcing of jobs to the private sector. For these reasons the employment numbers shown are likely to *underestimate* the actual numbers of people working for the departments and agencies listed. As quantitative data concerning these workers is unavailable, the margin of such underestimation is unknown.

Unlike the Parliamentary Zone, where the National Capital Plan provides only for employment directly associated with national institutions or Government administration functions, the land use policies for Barton and Forrest permit a much wider range of development and therefore broader employment options. As a result, the area has attracted a large number of office developments which accommodate National Associations and private sector firms seeking a prestigious location in close proximity to Parliament House and the key departments and agencies. The level of non-government employment in Barton/Forrest is unavailable but would form a significant supplement to that engaged in the public sector shown in Table 3.2.

Commuter Transport

For a city of its size, Canberra has a relatively comprehensive, but poorly patronised bus-based public transport system. The services are provided by ACTION - a business unit within the ACT Government's Department of Urban Services (DUS).

The 1996 Census of Population and Housing showed that only about 7 per cent of the ACT population used public transport to travel to and from work. This proportion had declined from 9 per cent in 1991. The 1996 result was only marginally above the 6 per cent who walked or cycled. (ABS, 2000b, p 65)

More recent surveys suggest that overall public transport usage has continued to fall dramatically from the 24 million passenger boardings recorded in 1995/96 to only 16.0 million in 1999/00. (ABS, 2000, p 156; ACT DUS, 2000, p 27)

The issue of declining patronage was canvassed in *Canberra: A Capital Future*, a strategic planning policy report produced by the ACT Chief Minister's Department. (ACT Government, 1996) It argued that if public transport were to become the mode of choice for a much larger proportion of travellers, then the type of services offered would have to change to much better meet the needs of those travellers. To illustrate the point, the report found 90 per cent of all people who drive to work consider they have no alternative to their car. The reasons they offered included:

- public transport was inconvenient with longer journey times; infrequent services and unsuitable routes;
- a desire or need to use a private car while at work; and

- the need to undertake multiple trips such as dropping off children to day-care and school, shopping; etc.

Other reasons cited for low patronage related to a generally poor level of awareness of the public transport system; some negative perceptions associated with personal security; and the major disadvantage it faces in competing for market share against the city's high quality, uncongested road network and plentiful parking.

The report suggested that:

"...traditional methods of increasing public transport use, such as reductions in journey times and increased service frequencies, will not, however, be enough. Such measures will, at best, result in marginal gains.

"Major changes to public transport's share of the transport 'task' will be delivered only by meeting the specific travel needs of the community, not by forcing the community to conform with a system that does not meet their needs.

"While not all community travel needs can be met by public transport, public transport *can* be made more relevant, by modifying or better coordinating existing public transport systems, and more attractive, by encouraging residential development close to the town centres and major public transport routes.

"Public transport systems will also become more attractive to users as the city and town centres are revitalised, enabling more trip purposes to be satisfied at a single destination. It is in this context that commuter access to these centres by car should be managed. Finally, positive community perceptions and attitudes about public transport will be critical in helping to maximise its use." (ACT Government, 1996, p 65)

The first stage in effecting change came in early 1999 when the ACTION system, which was based on local 'feeder' services which link suburbs to their nearest town centre and inter-town express services which operate between town centres, was restructured. (ACTION, 1999) The reforms introduced new routes, including through services; improved frequencies; and zone based fares including one hour transfer tickets which aimed to boost patronage and reduce deficits.

The most significant change called for many previously local routes to extend through to serve a more distant centre rather than terminating at the nearest town centre or interchange. These improvements offer more direct, single ticket services with fewer passengers now inconvenienced by having to transfer at interchanges. An example is Route 38 which operates from the inner northern suburb of Dickson - instead of terminating at the Civic bus interchange it now continues to Woden Town Centre via the key employment nodes at Russell, Barton and Kingston.

Most of the feeder services operating through the suburbs of Belconnen and Tuggeranong now continue to form the inter-town express service which operates via Commonwealth Avenue adjacent to the Parliamentary Zone.

Travel to the Parliamentary Zone and Barton

The most recent survey data specifically reviewing the travel patterns of commuters to the Parkes and Barton areas was collected in 1993 and is cited in a consultant's report prepared in 1996 for the then National Capital Planning Authority (NCPA). It confirmed that the preferred mode of transport used was private vehicle. (NCPA, 1996)

The study showed that some 87 per cent of workers used a car to commute (with 78 per cent as drivers); 9 per cent used a bus; and 2 per cent cycled. It found that the car occupancy rate was a low 1.13 persons. (p 12)

The 1993 data indicated that the worker's trip origins were quite widely distributed across Canberra - Belconnen generating 19 per cent of trips; City/North Canberra (19 per cent); Woden (19 per cent); Tuggeranong (17 per cent); South Canberra (12 per cent); and Queanbeyan (6 per cent). (pp 12-13)

The majority of workers (64 per cent) arrived at work in the 8am to 9am time band but the data also indicated a tendency to work later (52 per cent finished between 5pm and 6pm) with a significant number (25 per cent) leaving work after 6pm. (p 12)

Current day anecdotal evidence based on car park occupancy levels observed by the author suggests that the trend towards working longer and later days has continued and has important implications for public transport operations.

Parking

The 1996 NCPA report indicated that within Parkes (the Parliamentary Zone), and excluding the Parliament House car parks, some 4,960 parking spaces are available. The vast majority (almost 80 per cent) are located in dedicated car parks and have no time restrictions. (p 13)

Although total supply exceeds demand within the Parliamentary Zone, utilisation levels are greatest (sometimes at capacity) in the car parks adjacent to the main employment nodes of the Treasury Building, the National Library; and the John Gorton Building (accommodating the offices of the Departments of the Environment; and Finance & Administration). (Figure 3.1) In contrast, the car parking areas behind Old Parliament House are underutilised. (Figure 3.2)

Within Barton, the total number of spaces available exceeds 5,000. (p 13) Most are on developed sites, including dedicated tenant parking, with no time restrictions. Continuing growth in employment has fuelled demand for parking within the Barton precinct. Anecdotal evidence suggests on street parking is approaching saturation and new parking areas have been created by utilising former vacant sites.

Figure 3.1 Parking is at capacity adjacent to John Gorton Building offices



Source: Author (2000)

Figure 3.2 Under-utilised parking area behind Old Parliament House



Source: Author (2001)

The overall supply of parking exceeds demand in the combined Parkes/Barton area. If demand exceeds supply in pockets of the Barton area, commuters could, with only marginal inconvenience, elect to park in Parkes and walk to their workplaces in Barton. The introduction of some form of pay parking regime would probably dampen demand but the extent of any consequent mode shift to public transport would depend on a variety of factors, including the quality of the public transport option.

It is therefore appropriate that the *supply* of car parking be better managed to encourage and nurture the establishment of transit as an alternative mode. The lack of strategic transport planning by the key stakeholders (Commonwealth and Territory Governments) is evidenced by the continuation of ad hoc additions to the stock of free public car parking (most recently in Barton), despite the proposal to better manage demand through the establishment of a parking trust. (NCPA, 1996) The continuing failure to act is likely to result in a worsening spiral of car dependence and increased congestion.

Analysis

It is evident that there are two distinct market segments for public transport in the project study area - the visitor (including the many local residents who wish to access the Institutions and attractions of the CNA) and the commuter who works in the Parkes (Parliamentary Zone) or Barton/Forrest precincts.

In general terms, visitors may be more likely to use a good public transport alternative to access attractions when they are unfamiliar with their destination. This is particularly so for Canberra which lacks the legibility afforded by the grid layouts that are more common in other Australian and overseas centres.

Assuming a potential transit market of say 2 million visitors per annum, (about half the total) the weekly demand would, without considering seasonal factors, be around 77,000 trips (assuming each visit consisted of a forward and a return journey). This figure would increase further if visitors were to make multiple intra-zone trips taking in a number of attractions during their visit.

Assessing the demand from commuters is less certain. Being more familiar with the road network and the ready availability of parking (free or pay) at their destination mitigate

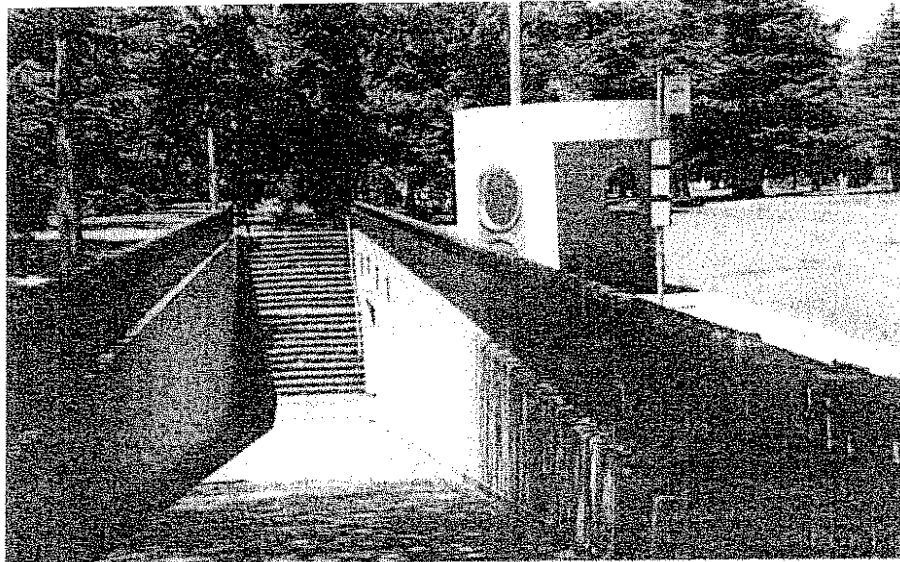
against significant mode shift to public transport. However, incentives such as superior quality service; real time passenger information; and enhanced affordability (such free or subsidised fares) would assist to build market share. Other factors which may influence mode choice might include the relative cost of fuel and motoring generally; road congestion; and the promotion of a community 'environmental conscience'.

The inclusion of the commuter segment would add to the system's financial viability by supplementing (and complementing) the base visitor market. With visitors tending to travel in accordance with attraction opening hours (ie after 9 am and before 5 pm) capacity would be available to focus more on commuter needs during the peak periods from 7 am to 9 am in the morning and 4.30 pm to 7 pm in the evenings). It would, therefore, allow for enhanced amortisation of the investment through a greater utilisation of capital (the buses and related infrastructure).

With a total workforce in excess of 15,000 in Parkes and Barton/Forrest, achieving a target market share of say 10 per cent (1,500 commuters) would generate 3,000 trips a day (15,000 trips a week) based on one forward and return journey Monday to Friday).

To best meet the needs of visitors, but particularly commuters, the public transport system *must be integrated* with other services, so that patrons are able to travel from their suburban origin points either directly to their place of work or be able to transfer with minimum inconvenience at strategic interchange points in or adjacent to the CNA. In the case of the Parliamentary Zone these transfer points would be best located along the existing public transport trunk routes at Commonwealth Avenue and Kings Avenue. (Figure 3.3)

Figure 3.3 Existing bus stop in Commonwealth Avenue. This site, with its existing pedestrian underpass, could be upgraded to become a key transfer point with existing ACTION commuter services.



Source: Author (2001)