



BusVic Social Strategies 2021 survey summary report

September 2021

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Executive Summary

In early 2021, BusVic established a Social Strategies Sub-Committee (SSC) to act as a think tank by providing advice and actively contributing to initiatives that address the social issues facing operators, their teams, and the Victorian bus and coach industry more broadly. The SSC's scope of work includes events, projects, outreach, and research. To help inform these activities, the SSC invited BusVic members and their employees, supplier partners of the association, and BusVic employees to complete a short, anonymous survey to help identify social issues impacting the industry.

This report presents a summary of themes that emerged from the survey and does not enter into further analysis.

The survey was conducted throughout June to July 2021 and received **121 responses**. The strongest representation in the survey is by those located in metropolitan Melbourne (58%), bus drivers (53%), full time employees (62%), males (82%), 55-64 year old's (42%), and those of English background (42%). Further detail on survey respondents can be found on pages 4 to 6.

The survey primarily focused on identifying present and future concerns facing the industry. Seven major themes emerged from the data, these being the short and long-term impact of COVID-19, the current and future workforce, challenges facing bus operators, on-board experiences and passenger interactions, local and regional development, environmental issues, and technology. These seven themes are summarised, together with select direct quotes from survey respondents, on pages 7 to 12.

Highlighted in this report is a profile on the next generation (page 13) – those in the industry under the age of 44 years old – and a bus driver perspective on current and future concerns (page 14).

The SSC hosted a webinar on Thursday 19 August 2021 to present the key findings from the survey to BusVic members. The recording is available to members on the BusVic website.

Section 1: Survey respondents

The survey asked respondents to provide information about themselves—namely location, their role, employment status, gender, age, and cultural background. The results are presented over the following pages.

The survey asked these questions to firstly, help map industry diversity – to understand who we are as an industry – and secondly, to help give voice on themes and priorities common to demographic features.

Location

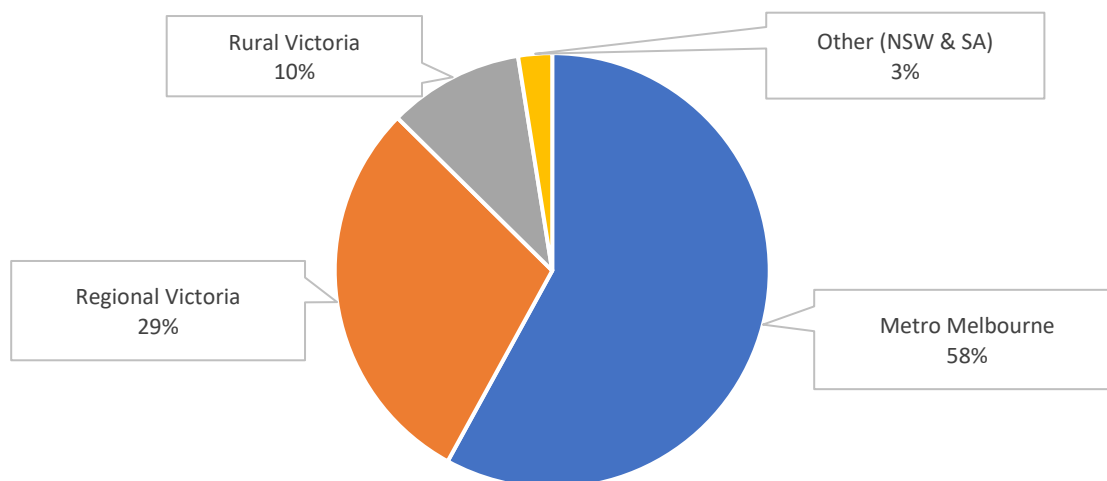


Figure 1: Location of survey respondents

Role

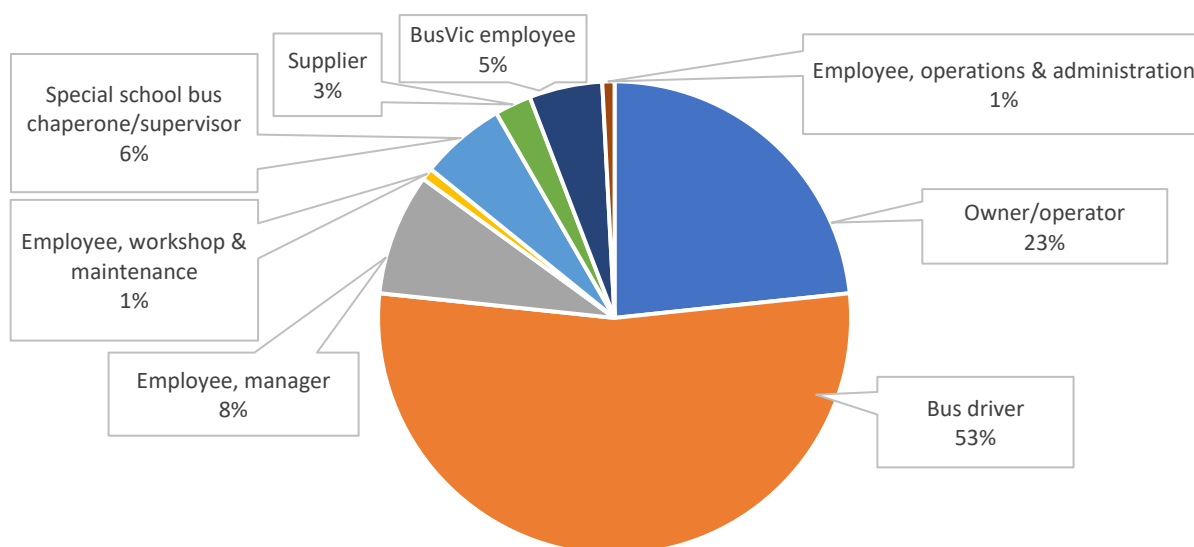


Figure 2: Role/job classification of survey respondents

Employment status

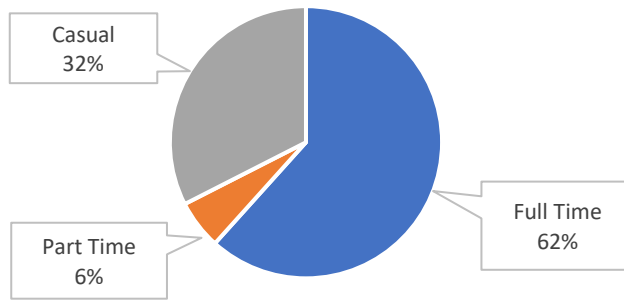


Figure 3: Employment status of survey respondents

Gender

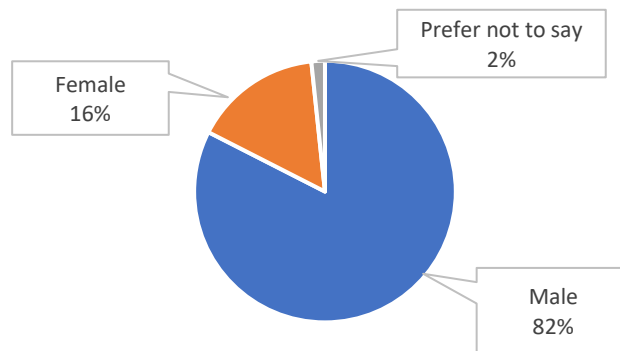


Figure 4: Gender of survey respondents

Age

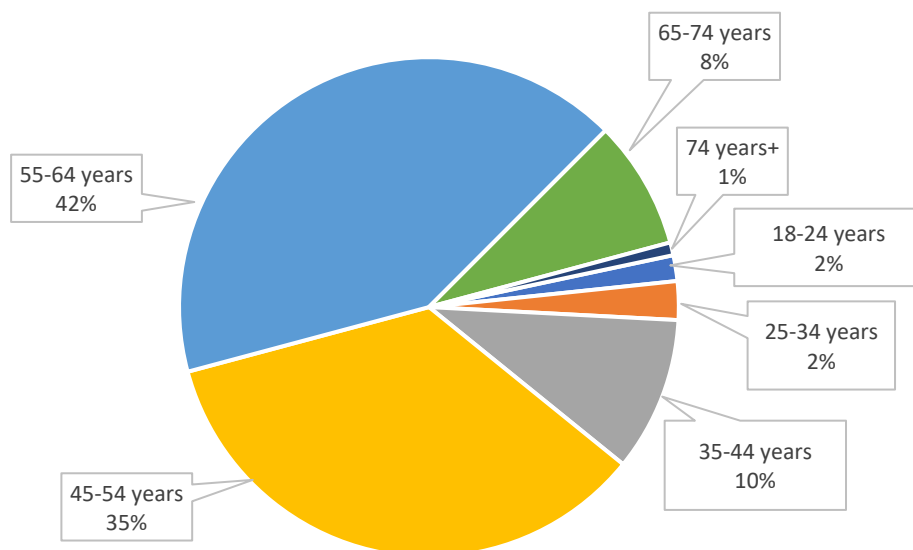


Figure 5: Age range of survey respondents

Cultural background

Survey respondents were invited to disclose their cultural background as a way of identifying the diversity of the industry – the ethnicity, ancestry, and related skills of languages and global experiences of the workforce.

This question was a free-form text response, not a pre-determined list to select from. The 'Australian' category includes those of multi-generational Australian-born heritage and those who perhaps identify more strongly with being 'Australian' than their country of birth or family cultural background.

The 'Other' category combines single responses.

The workforce is more culturally diverse in metro Melbourne and in bus driver occupation cohort.

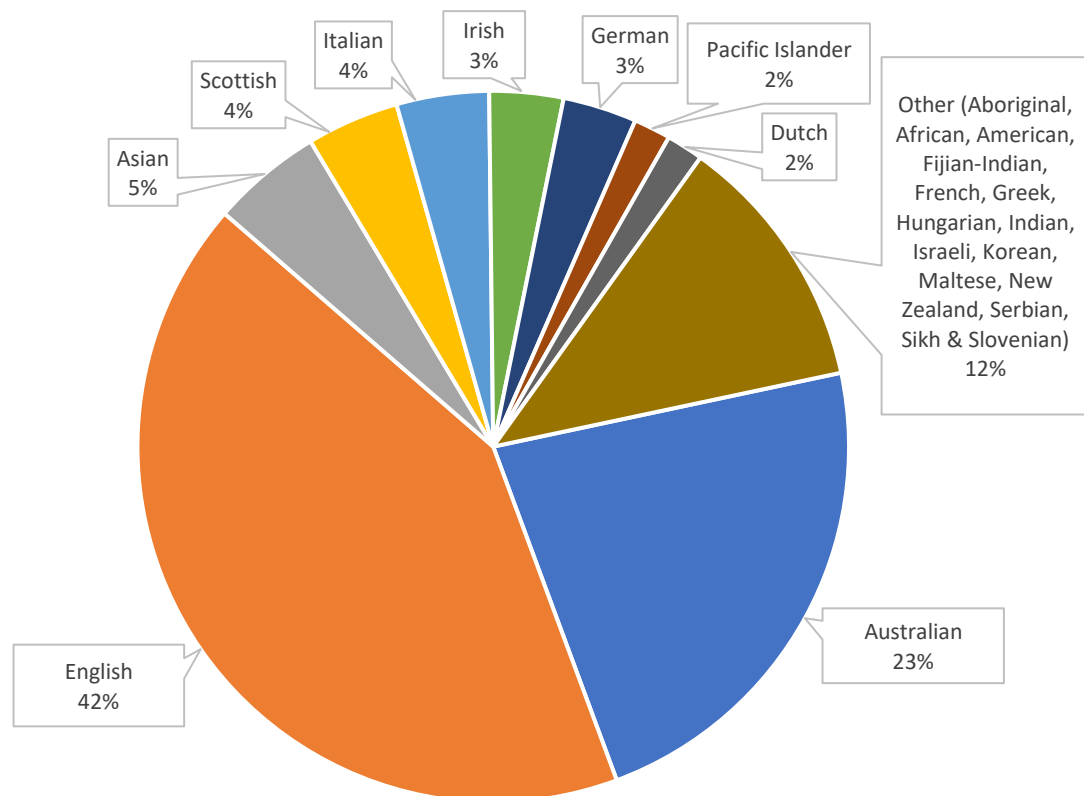


Figure 6: Cultural background of survey respondents

Section 2: The issues

Overview

The primary purpose of the survey was to identify the social issues currently impacting and emerging within the industry. The survey asked the following questions:

- What do you believe are the big issues facing your operation, your teams, and/or your local community?
- What concerns or worries, if any, do you have about the present and future of the bus and coach industry?

From the responses provided, seven themes emerged that directly relate to both the present and the future. Ranked in order by volume of responses the themes are COVID-19, workforce, operators challenges, on-board experiences, development, environment, and technology.

A summary of the themes is presented below, including exemplar quotes from the data to illustrate. All quotes are presented as provided, with some minor editing done to improve context and readability.

COVID-19

COVID-19 responses fell into three main areas:

- The short and long term social and economic impact of lockdowns.

Far and away the biggest issue since early 2020 has been the impact of Victoria's COVID lockdowns on businesses - in our sector, especially on tour and charter operations - and on children's education with school closures.

Anxiety and uncertainty due to the pandemic impact on business and the constant lockdowns affecting revenue and incomes.

The ability of the industry to withstand the impact of COVID.

- The decimation facing tourism, and the impact to bus tour and charter operators.

COVID has destroyed the seniors touring market and with borders closing rapidly all the time very hard to plan excursions and tours. Passengers won't book and schools cancel.

Tour sector is in shambles with COVID and borders.

Recovery from Covid lockdowns is going to be tough for the tour and charter sector. A couple of tour companies have gone to the wall. These income losses are forever, it's not like they just make it up once/when lockdowns end and the economy picks up.

- Vaccine anxiety relating to the pace of roll out and vaccinated populations, and uncertainty about mandatory workforce vaccination.

Possibly being forced to have the vaccine to keep my job.

Travel restrictions due to slow vaccinations will send more companies to the wall.

Slow covid vaccination rates crippling the economy and recovery of life back to some sort of normal.

I am sick of wearing a face mask at work when I am fully vaccinated. Drivers should have the option to display their vaccination certificate and not have to wear a mask while they drive.

Workforce

In in the workforce theme the following issues emerged:

- Managing the lifecycle of an employee and an ageing workforce, the constant cycle of attracting talent through to transition (such as registration, retirement, or redundancy) and succession planning.

Attracting talent, experienced or not, to the industry or company for long-term commitment.

The attraction of new employees to the industry is on-going and we know of the massive pool of female (mum) drivers that we just can't seem to attract! Our industry could benefit from this cohort of the population in our regional communities.

Promoting to the wider community that the bus industry is a stable, welcoming, provides flexible working hours that enables employees a fulfilling career. I am sure the statistics show that employees remain with companies a very long time and this is testament that the companies care.

- Skill shortages with concerns relating to where the future workforce will come from, and the time and resources required to train and retrain staff.

Unemployment and labour shortage (especially skilled trades), recruiting qualified tradespersons e.g. Diesel & Body Technicians, lack of suitable drivers.

Getting drivers - no one wants to work and then the red tape to work and the layers of possible breaches that a driver or business can get why would you want to work in the industry as high risk. For example, schools now doing risk assessments on routes buses travel on school excursions. The many grey area in the school bus program make it difficult for drivers to keep rolls and keep a time table.

Lack of diversity within the workforce.

- Job prospects and security, spanning the spectrum of rostering/shifts and career pathways through to uncertainty caused by COVID-19, and the impact of new technology and digitalisation on job availability.

Being casual workers, not enough work hours to make ends meet. Most are older or senior citizens, retraining is very important.

I am worried about future job prospects for the bus industry as COVID-19 has already diminished many jobs in this industry in just this year and last year alone.

COVID-19 played a major role causing job instability and job loss within the local community. Due to the nature of my role as a bus driver, my daily operations involved a lot more cleaning procedures, which increased workload and stress.

- Individual staff health and wellbeing and the idea of organisational health (referring to an organisation's ability to function effectively, to adapt to change, and to grow from within).

I believe the 'esprit de corps' amongst staff could be improved ... The need to 'experience some sense of community' is vital to us all, the workplace at the moment is one of the few places offering this potential.

Maintaining connectedness during the new ways of working and living with COVID. Dealing with the mental impacts of the pandemic.

Operator challenges

The third theme of operator challenges raised concerns about:

- Business survival and consolidation within the industry and the roll-on effect to employees and local communities.

The industry was always about local family ownership and operations but this is slowly changing with the spread of national and multi-national operators.

Corporatising, consolidating of bus businesses which is limiting the personal face-to-face conversation between all levels of management and staff.

Loss of operator numbers = loss of individual expression and creativity and the general loss of the soul of the industry when family owned companies are gobbled up.

- Managing compliance, paperwork, and red tape some of which has been accelerated by COVID-19.

Too much politics in operating a bus bogged down in paperwork.

Paperwork involved in the business is ridiculous and only seems to increase.

The huge amount of back-office people required to operate buses, obviously in comparison to only a decade ago. From a people perspective, post multiple lockdowns, our operation has seen need for more resources - in effect we are less efficient.

- Engagement with government such as contract negotiations, reporting and perceived unbalance within the relationship by not being seen as an equal partner in delivering services

More and more is being required from us and yet government are paying less and less. This creates a back log of work that takes valuable time away from the tasks required. More time is spent reporting to government on matters that don't impact the reliability and safety of the service.

On-going contract negotiations and the inability to plan and invest into the future because of the tender-centric mind set of the government and private schools.

A feeling of 'guilty until proven innocent' within the regulatory framework.

[The Government] treat us like lower case employees not contractors. Yes we are contractor, but we shouldn't be treated [badly].

Need for the persons at the coal face to be more actively engaged with [government] in regard to some decision making.

On-board experiences

The next theme is on-board experience – what happens in, on, and around buses.

- Driver safety from not only road users, and the condition of the roads themselves, but also challenges presented by passenger behaviour both on-board and at bus stops.

Difficult passengers and drivers put under pressure to deal with these people leading to stress and mental health issues for drivers.

As a driver, the most abuse I receive is from other road users who don't know or understand the 'give way to buses' rule, and the reasons we have it. I would like to see this rule publicised. Buses cannot accelerate quickly and its passengers aren't wearing seatbelts which is something other road users don't understand. I would like to see these points publicised as well.

As a driver it's a balancing act just trying to avoid wayward and unpredictable road users and pedestrians.

Unless attention is given to addressing issues that drivers have complained about, there will be a decline in the number of persons entering the industry or remaining. Particularly where it comes to behaviour of passengers towards drivers. Lack of support or empathy often shown which is responsible for many who depart the industry earlier than they had anticipated.

- **Managing on-board compliance, with calls for clarity on the role of the bus driver, and support for them, to enforce wearing face masks and addressing fare evasion.**

The spread of COVID-19 through the fleet from poorly regulated rules for mask wearing by passengers we the bus drivers feel powerless and worn down not having enough say about this.

Give the bus drivers more power to refuse passengers not wearing masks. Ensure we have better chances of going home after work and not to hospital.

At the moment we are told to just let the non-mask wearing public on as it's not our job to tell them to wear masks. It bothers me as I am being put at risk and so is my family because a local government law isn't being enforced.

Driver are held in very low regard by the public. There is little no policing of the law for passengers. In the past 3 years I have had inspectors on my bus 3 times.

[Fare evasion] situation very toxic creating stress for drivers and discontent with paying passengers.

Fare evasion encourages anti-social behaviour.

Development

The development theme speaks to rural and regional sustainability and infrastructure.

- **Rural and regional growth and sustainability and shifting population demographic.**

What can the bus industry do to support the sustainability of small rural communities?

The economic and social sustainability of small rural communities is the critical issue for rural school bus operators. The strength and diversity of rural communities directly impacts on school size, pupil/student numbers, employment pool, service industry support, road quality and lifestyle.

Decline in rural population of young people and becoming a retirement village. No business growth or any real business development in the pipeline.

We are looking at population decline in rural areas. The agricultural sector is being influenced by huge corporations buying very large acreage hence we have farmer and family reduction. With this comes less children obviously, so our bus numbers are dropping. The bulk of new community members to our area are retirees or near retirees and they are settling in the townships.

Lack of industry and infrastructure around my area leading to less numbers and less requirements for public service.

- **Road conditions, congestion, and engagement of the community and bus industry in urban design.**

An improved network of bus lanes, express lanes, priority at traffic lights for buses, etc... would all assist in pushing people towards public transport options. If the service is cost effective and quicker than sitting in a car in traffic then it is more likely to be used.

Continual decline of consideration given to bus drivers when developing and redeveloping road infrastructure and planning and implementing route/timetable changes.

Congestion affects our run times as more traffics means slower travel = less jobs possible per day per vehicle = loss in earnings.

Traffic congestion and greater urbanisation of our rural environs with the current metro population exodus, but without government investment to match.

- **Schools particularly the immediate impact of remote learning and long term decline in rural and regional schools.**

As the number of rural schools and pupil/student numbers continue to decline how committed will governments be to continuing to provide school bus services? And given the expenditure undertaken to deal with the pandemic, what impact will inevitable future state budget savings measures have on the approach taken to school bus contracts?

Decline in student numbers but the area that needs to be covered doesn't alter. The reduction in bus runs servicing each school can only be diminished so much on numbers but not on area.

Reduction of students travelling on school buses in country areas.

Environment

The environment theme was dominated by two issues – Zero Emission Bus developments and broader moves for operators to be more environmentally friendly.

- **The Victoria State Government's pledge for Zero Emission Buses (ZEBs) by 2025.**

The Zero Emissions target in 3 years buying new buses is very unrealistic and places unnecessary long term stress on operators that can't see what this really looks like with bus purchase and maintenance teams and depot requirements. This needs a long-term plan not in 2025.

How will this happen in the given time frame, how will this work especially given current depots set up for diesel, re-training of current mechanics etc.

Change to ZEB's ... unsure how it will affect our operation.

- Going green and being environmentally friendly.

Going Green and the cost involved and will a bus last 18 years.

The industry sits at a cross roads, diesel engines are not going to get much cleaner in their current form, yet hybrid technology (or fully electric) is not at a point where it can take over and carry the heavy vehicle industry forwards. Sitting in limbo is never good, there needs to be a jump forwards to reinvigorate the industry and hopefully change the public mindset on the use of heavy vehicles on our roads.

More incentive for our operations to be environmentally savvy - the state could easily create incentives for bus operations to be the pinnacle of local communities for recycling - re generating and driving environmental efficiency thru govt contract incentives.

Technology

The survey revealed anxiety about the possible impact of technology and autonomous vehicles.

- Autonomous vehicles and impact on the workforce.

Automation of buses resulting in a mass loss of jobs many of whom will not be able to easily transition into an alternative industry.

I am worried about the potential stunted growth of new jobs in this industry due to potential rise of automated self-driving vehicles.

Self-driven commercial buses and finding suitable alternative occupation.

- Digital disruption on processes, job prospects, new skills and technology.

Access to affordable technology that assists with keeping up with the larger corporations that the State Government prefers to work with.

Hoping drivers will continue to be needed due to advancing technology.

Digital disruption anxiety. Excessive regulation for one part of the industry and nothing for other parts. Businesses and employees degrading to an 'auction' regime for work at the cheapest price forcing casualisation, contracting and holding wages growth back.

Section 3: The Next Generation

From the survey responses, a profile of the next generation can be drawn.

The industry’s ‘next generation’ includes survey respondents between the ages of 18-44 years old. This cohort accounts for 14% of overall responses to the survey. Figure 7 (below) illustrates details about the next generation who participated in the survey – their gender, location, role, and employment status by age.

When asked what about the big issues facing bus operations, staff and the local community, the next generation’s responses were dominated by COVID-19 (similar to issues outlined in Section 2) followed by driver on-board experience and passenger abuse, and staff retention.

Concerns about the future were mostly on career development, job security and skill shortages; government policy effective business continuity and operational demands; automation and digital disruption; and factors impacting the ability to effectively to their job (such as health and urban design/traffic congestion).

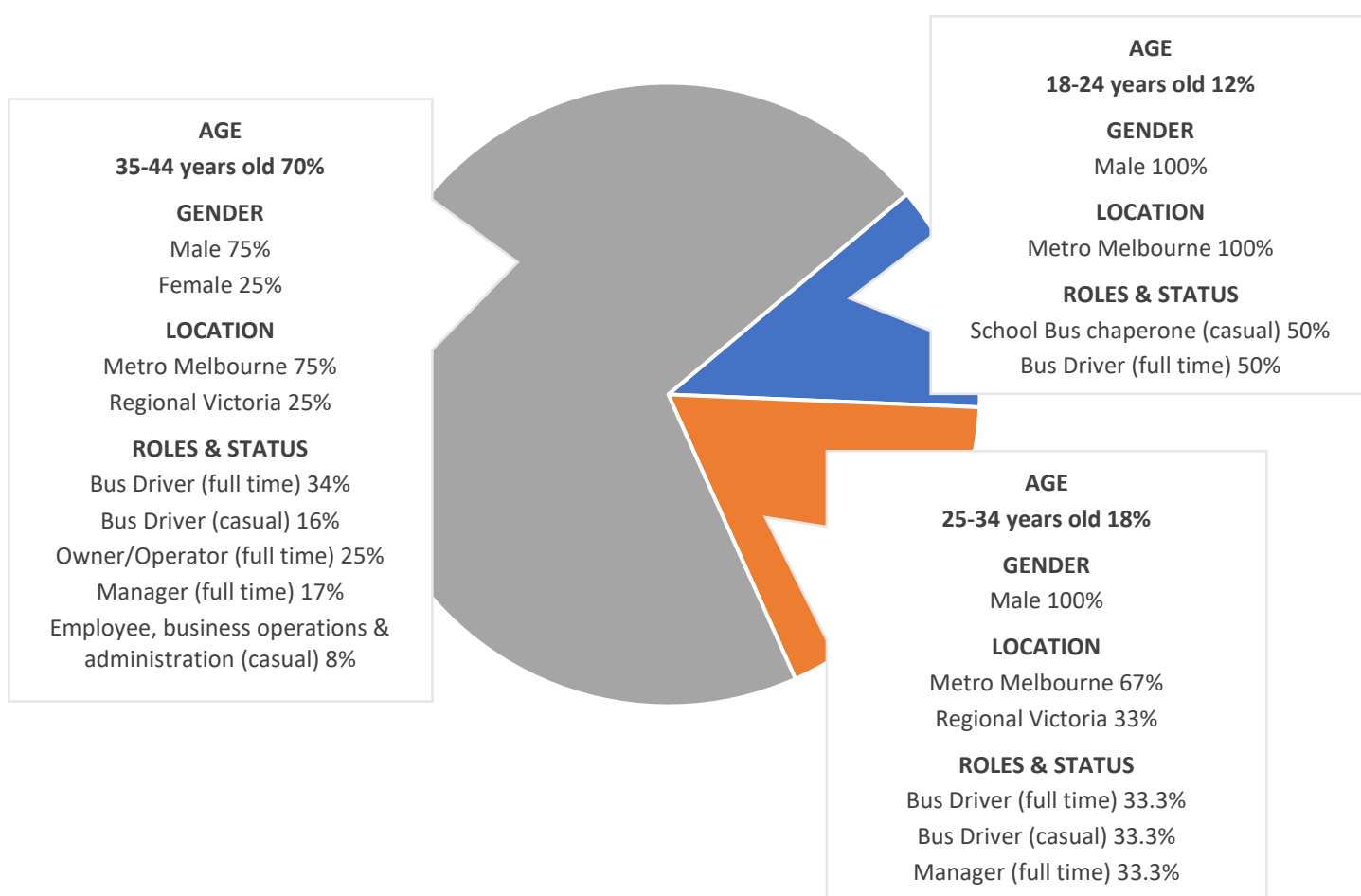


Figure 7: Gender, location, role, and employment status of 18-24, 25-34 and 35-44 year old survey respondents

Section 4: Bus Driver perspective

Bus drivers accounted for 53% of survey responses. Their contribution provides a perspective on the demographics of the bus driver workforce and their current and future concerns.

Figure 8 below outlines bus driver gender, age, location, and employment status.

The employment status of this cohort of bus drivers is 48% casual (90% working in metro Melbourne), 47% full time (57% working in regional Victoria) and 5% part time (100% rural Victoria).

In response to being asked about the big issues facing the industry, bus drivers note (in order of importance) the impact of COVID-19 on working hours and conditions; passenger behaviour and fare evasion; job security and need for extra hours/shifts; road congestion; concerns for safety; and lack of respect experienced by bus drivers.

Their major concerns for the future include (in order of majority responses) bus driver welfare and safety; future job prospects; passenger behaviour and fare evasion; environmental issues and going green; need to upskill and impact of technology on job; road congestion; and long-term impact of COVID-19.

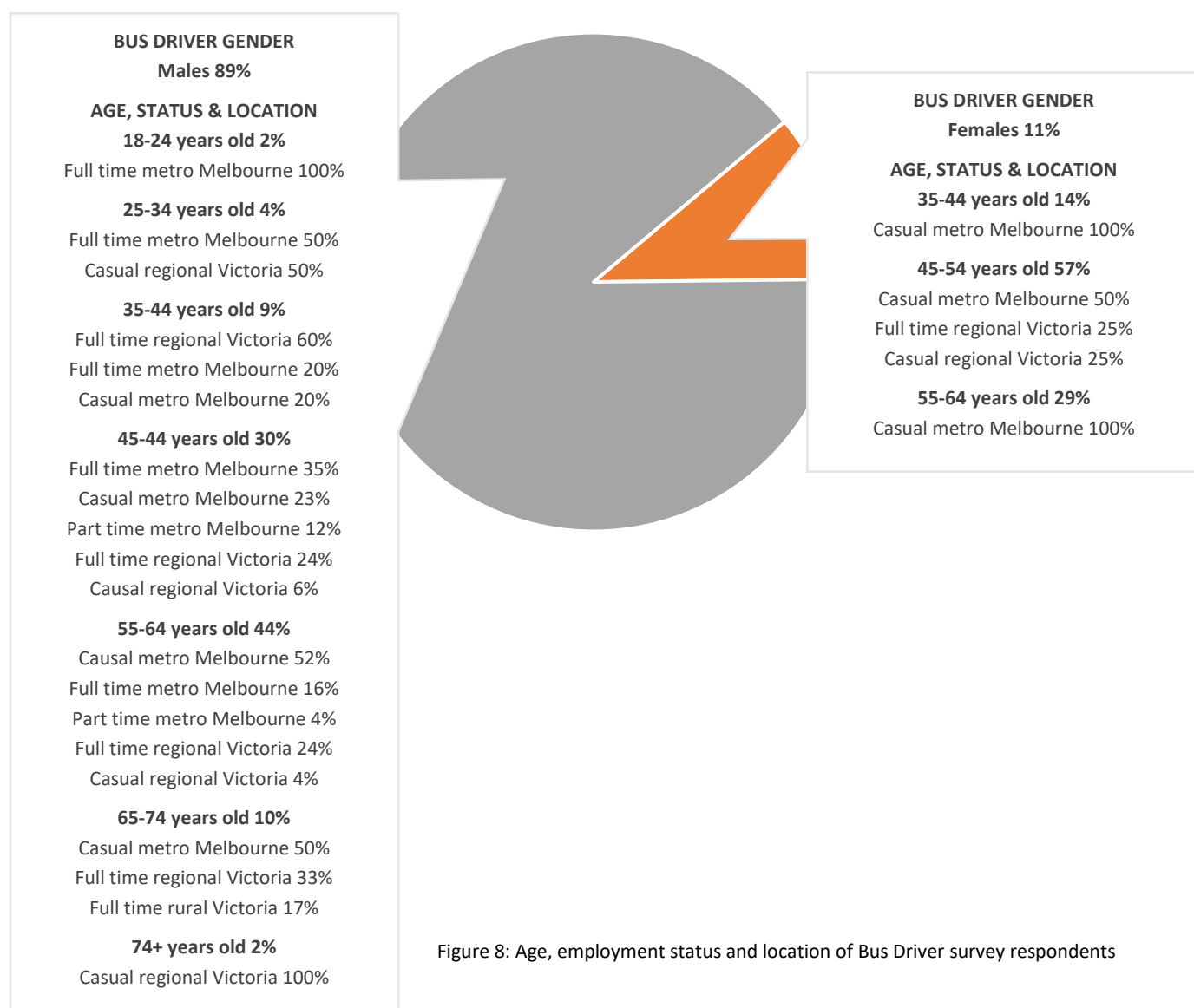


Figure 8: Age, employment status and location of Bus Driver survey respondents

Section 5: Current activity

Finally, the survey asked how active operators are across a range of broader social issues that are currently emerging and being addressed in most Australian industries. Table 1 outlined how active operators are across the key phases of the employee lifecycle, Indigenous issues, workforce diversity, the environment, and state of emergency recovery.

	High activity	Much activity	Some activity	Little activity	No activity
Promoting good health and wellbeing	36%	25%	31%	5%	3%
Encouraging social interaction and inclusion	20%	36%	29%	8%	7%
Attracting new employees	20%	40%	23%	13%	4%
Assisting positive retirement	10%	33%	28%	16%	13%
Indigenous recognition and reconciliation	8%	21%	28%	22%	21%
Workforce diversity (such as age, gender, culture)	28%	36%	22%	9%	5%
Life skill development (such as financial literacy, digital and IT skills, interpersonal communication).	11%	27%	27%	18%	17%
Environmental impact and climate change	27%	33%	28%	7%	5%
State of emergency recovery, such as working with the team and the community on natural disaster recovery and the impact of the pandemic.	19%	33%	27%	10%	11%

Table 1: Level of activity by Victorian bus operators on general social issues

Next steps

The Social Strategies Committee wish to thank all the respondents for their participation and frank comments.

From natural disasters to the pandemic, the Victorian bus industry has been impacted in some way over the last 18-months. The survey shows us that it is an intense time as the industry simultaneously works on business survival and community recovery while it grapples with government initiatives and concerns for the current and future workforce.

The Committee wants to be of service on these issues and is keen to uphold and promote the contribution the bus industry makes to ‘humanising the industry’ by putting people at the heart of all that is done.

The Committee’s role will be in informing BusVic events, projects and research to create awareness on the business impact of social issues, and how to practically address current challenges and prepare for future transformations.