

Independent Pricing and Regulatory Tribunal of NSW

2021 Survey of Private Ferry Routes

Contact name: David Bruce
Phone number: 02 6109 6300
Our ref: 5073

July 2021

Contents

I. Executive Summary	1
II. Introduction	9
A. Background	9
B. Research objectives	10
C. Methodology	10
III. Detailed Results	13
A. Resident Survey Results	14
Awareness of Ferry Services	14
Knowledge of Ferry Service Routes	15
Usefulness of Ferry Services	16
Usage of Ferry Services	19
Awareness and Usage of Other Transport Options	23
Access to Transport Services	30
Satisfaction with Transport Services	32
Preference for Ferries	35
Perceptions of Ferry Services	37
Expectations of Future Use and Factors Affecting Use	42
B. Ferry User Survey Results	45
Preferences for Using Ferries	45
Reasons for Using Ferries	47
Last Trip: Purpose	51
Last Trip: Time and Day	53
Getting To and From the Ferry	54
Last Trip: On Board Experiences	57
Fares and Value for Money	61
Appendix A: Questionnaires	63
Appendix B: Catchment areas for resident survey	94
Appendix C: Sample demographics	97

This research was conducted in accordance with
ISO20252 and ISO27001 quality standards and the Privacy Act 1988.

I. Executive Summary

Source of data:

A total of 772 surveys were completed, using two sampling methods: online panel and CATI telephone to sample residents in suburbs immediately adjacent to seven private ferry operators and on-board surveys on 4 of the private ferry routes to sample users of those services.

A total of 685 surveys were conducted with residents in suburbs immediately adjacent to seven private ferry routes operating in NSW, whether or not they used those services (samples for each route range from n=69 to n=104). Resident surveys were conducted by online panel and CATI telephone methods, with all interviews from each defined area combined for analysis. No weighting was applied to the samples, but because of the limited sample available to conduct the surveys in such small areas, an older age profile than the community is present in the survey data.

Of those 685, 245 surveys were completed with people who had used one of these ferry routes within the last 12 months. These were combined with a sample of 87 passengers who completed a survey while on board for a total user sample of 332 surveys (combined user samples for each route ranged from n=27 to n=77).

Results are always presented at the route-level. Overall averages are shown in some cases, but only to assist interpretation, and these averages should not be used to communicate overall results. Results using **green** colour coding are from the resident survey, and using **blue** colour coding are from the users survey.

Overview of key results

Over the following pages, summaries of key results for each route are shown.

Because of the independent nature of the routes and samples, overall combined results are not meaningful 'total' results and are not shown in these route summaries. Overall averages are shown in the body of the main report to provide a general point of comparison for interpreting the results at the level of each route.

1

Brooklyn

The Brooklyn Ferry service runs between Brooklyn and Dangar Island, with some trips also including Little Wobby.

Summary of results from IPART NSW Private Ferry Survey 2021



Residents (n=44-69)



64% Aware of ferry service

Of those aware of ferry service....

89% At least roughly aware of ferry route

80% Knew details of ferry route

Perceptions of service



Potential usefulness of ferry service for...

48% ...me personally

90% ...my community

Satisfaction with service (residents aware of service)

★ ★ ☆ **71%** satisfied or very satisfied with ferry service

Compared with % satisfied or very satisfied with...

32% Bus **65%** Train **33%** Taxi / rideshare **56%** Water taxi



Expectations of service

% of residents who expect ferry service to be good or very good

87% Being an enjoyable way to travel

71% How easy it is to get on and off the ferry

71% General cleanliness and condition of the ferry

68% Safety

65% Being easy to get to where you catch it

61% Customer service

61% How long it would take to get to your destination

59% Hygiene during COVID

58% Being easy to get where you needed to go at the other end

42% Being available when you wanted or needed it

32% Value for money

Experiences with service



Use of transport services (all residents)

% who used service in...	...last 6 months	...last 12 months	...ever
Private ferry	38%	39%	53%
Bus	19%	23%	42%
Train	59%	62%	72%
Taxi / rideshare	10%	11%	14%
Water taxi	19%	22%	38%
Private vehicles	94%	94%	94%
Private boats	35%	41%	47%

Looking forward

Travel intentions over next 12 months

% who intend to use the ferry...

▲ **7% more**

84% about the same

▼ **9% less**

-2% Nett change

Top 3 changes that would have at least a small effect on increasing use

\$\$\$ **44%** cheaper fares

🕒 **38%** shorter wait times

🔄 **36%** more stops

Users (n=71)

Experiences of most recent trip



Purpose top 2 reasons

31% recreation or social activity

27% work



28% Destination choice at least partly influenced by ferry route

Time taken to get to...

	< 5 mins	6-10 mins	11+ mins
... ferry	41%	32%	27%
... destination	37%	34%	30%



57% rated overall value for money as at least adequate (adequate, good, or very good)

★ ★ ☆ **87%** At least partly satisfied with most recent trip

% users who rated aspects as at least adequate (adequate, good or very good)

🧼 **100%** cleanliness and condition of ferry

🕒 **93%** being on time

📅 **88%** timing / availability of service when you needed to travel

💖 **82%** customer service

💰 **57%** value for money

2

Central Coast

Central Coast Ferries run between Woy Woy and Empire Bay, with stops at Davistown and Saratoga.

Summary of results from IPART NSW Private Ferry Survey 2021



Residents (n=22-101)



72% Aware of ferry service

Of those aware of ferry service....

81% At least roughly aware of ferry route

49% Knew details of ferry route

Perceptions of service



Potential usefulness of ferry service for...

50% ...me personally

95% ...my community

Satisfaction with service (residents aware of service)

★ ★ ★ **66%** satisfied or very satisfied with ferry service

Compared with % satisfied or very satisfied with...

65% Bus **86%** Train **61%** Taxi / rideshare **45%** Water taxi



Expectations of service

% of residents who expect ferry service to be good or very good

83% Being an enjoyable way to travel

83% Safety

72% How easy it is to get on and off the ferry

69% General cleanliness and condition of the ferry

69% Customer service

63% Being easy to get to where you catch it

61% How long it would take to get to your destination

60% Being easy to get where you needed to go at the other end

59% Hygiene during COVID

56% Being available when you wanted or needed it

52% Value for money

Experiences with service



Use of transport services (all residents)

% who used service in...	...last 6 months	...last 12 months	...ever
Private ferry	16%	20%	49%
Bus	33%	40%	78%
Train	53%	59%	84%
Taxi / rideshare	25%	36%	66%
Water taxi	1%	1%	5%
Private vehicles	87%	87%	92%
Private boats	10%	12%	22%

Looking forward

Travel intentions over next 12 months

% who intend to use the ferry...

▲ **13%** more

73% about the same

▼ **14%** less

-1% Net change

Top 3 changes that would have at least a small effect on increasing use

\$\$\$ **48%** cheaper fares

🔄 **47%** more stops

🕒 **31%** shorter wait times

Users (n=20-21)

Experiences of most recent trip



Purpose top 2 reasons

86% recreation or social activity **10%** other



65% Destination choice at least partly influenced by ferry route

Time taken to get to...



< 5 mins 6-10 mins 11+ mins

... ferry 43% 38% 19%

... destination 53% 33% 14%



85% rated overall value for money as at least adequate (adequate, good, or very good)

★ ★ ★ **100%** At least partly satisfied with most recent trip

% users who rated aspects as at least adequate (adequate, good or very good)



100% being on time



95% cleanliness and condition of ferry



95% timing / availability of service when you needed to travel



95% customer service



95% value for money

3

Church Point

The Church Point Ferry Service has 4 stops on Scotland Island and 3 on the western foreshore of Pittwater, as well as Church Point.

Summary of results from IPART NSW Private Ferry Survey 2021



Residents (n=49-104)



58% Aware of ferry service

Of those aware of ferry service....

79% At least roughly aware of ferry route

34% Knew details of ferry route

Perceptions of service



Potential usefulness of ferry service for...

24% ...me personally

98% ...my community

Satisfaction with service (residents aware of service)

★ ★ ★ **54%** satisfied or very satisfied with ferry service

Compared with % satisfied or very satisfied with...

79% Bus **38%** Train **70%** Taxi / rideshare **36%** Water taxi
Low sample (n=8)



Expectations of service

% of residents who expect ferry service to be good or very good

- 78%** Being an enjoyable way to travel
- 68%** Safety
- 65%** Customer service
- 63%** How easy it is to get on and off the ferry
- 60%** Hygiene during COVID
- 59%** General cleanliness and condition of the ferry
- 52%** How long it would take to get to your destination
- 43%** Being easy to get where you needed to go at the other end
- 42%** Value for money
- 38%** Being easy to get to where you catch it
- 30%** Being available when you wanted or needed it

Experiences with service



Use of transport services (all residents)

% who used service in...	...last 6 months	...last 12 months	...ever
Private ferry	8%	12%	39%
Bus	70%	80%	96%
Train	4%	4%	4%
Taxi / rideshare	46%	51%	77%
Water taxi	6%	6%	23%
Private vehicles	94%	94%	95%
Private boats	24%	28%	48%

Looking forward

Travel intentions over next 12 months

% who intend to use the ferry...

▲ **6% more**
84% about the same
▼ **11% less**
-5% Net change

Top 3 changes that would have at least a small effect on increasing use

➕ **41%** more stops
\$\$\$ **30%** cheaper fares
🕒 **24%** shorter wait times

Users (n=45-46)

Experiences of most recent trip



Purpose top 2 reasons

70% recreation or social activity

9% work / study



58% Destination choice at least partly influenced by ferry route

Time taken to get to...



	< 5 mins	6-10 mins	11+ mins
... ferry	26%	13%	60%
... destination	40%	26%	35%



79% rated overall value for money as at least adequate (adequate, good, or very good)

★ ★ ★ **96%** At least partly satisfied with most recent trip

% users who rated aspects as at least adequate (adequate, good or very good)

- 100% cleanliness and condition of ferry
- 100% being on time
- 100% customer service
- 90% timing / availability of service when you needed to travel
- 78% value for money

4

Clarence River

Clarence River Ferries run between Yamba and Iluka on the Clarence River.

Summary of results from IPART NSW Private Ferry Survey 2021



Residents (n=24-104)



82% Aware of ferry service

Of those aware of ferry service....

96% At least roughly aware of ferry route

91% Knew details of ferry route

Perceptions of service



Potential usefulness of ferry service for...

61% ...me personally

97% ...my community

Satisfaction with service (residents aware of service)

★ ★ ★ **86%** satisfied or very satisfied with ferry service

Compared with % satisfied or very satisfied with...

64% Bus **59%** Train **55%** Taxi / rideshare **0%** Water taxi
Low sample (n=2)



Expectations of service

% of residents who expect ferry service to be good or very good

- 91% Being an enjoyable way to travel
- 88% Safety
- 88% Customer service
- 88% General cleanliness and condition of the ferry
- 85% How easy it is to get on and off the ferry
- 80% Being easy to get to where you catch it
- 79% Hygiene during COVID
- 76% Value for money
- 74% How long it would take to get to your destination
- 63% Being easy to get where you needed to go at the other end
- 58% Being available when you wanted or needed it

Experiences with service



Use of transport services (all residents)

% who used service in...	...last 6 months	...last 12 months	...ever
Private ferry	27%	37%	75%
Bus	14%	17%	50%
Train	1%	3%	16%
Taxi / rideshare	20%	21%	36%
Water taxi	0%	0%	1%
Private vehicles	97%	97%	97%
Private boats	16%	21%	32%

Looking forward

Travel intentions over next 12 months

% who intend to use the ferry...

▲ **13%** more
80% about the same
▼ **7%** less
+6% Nett change

Top 3 changes that would have at least a small effect on increasing use

🔄 **39%** more stops
💰 **29%** cheaper fares
⌚ **23%** shorter wait times

Users (n=36)

Experiences of most recent trip



Purpose top 2 reasons

86% recreation or social activity

8% shopping



42% Destination choice at least partly influenced by ferry route

Time taken to get to...



	< 5 mins	6-10 mins	11+ mins
... ferry	47%	39%	14%
... destination	33%	28%	39%



96% rated overall value for money as at least adequate (adequate, good, or very good)

★ ★ ★ **100%** At least partly satisfied with most recent trip

% users who rated aspects as at least adequate (adequate, good or very good)

- 100% cleanliness and condition of ferry
- 100% being on time
- 100% customer service
- 97% timing / availability of service when you needed to travel
- 97% value for money



Cronulla

Cronulla Ferries runs between Cronulla and Bundeena.



Summary of results from IPART NSW Private Ferry Survey 2021

Residents (n=74-99)



89% Aware of ferry service

Of those aware of ferry service....

97% At least roughly aware of ferry route

84% Knew details of ferry route

Perceptions of service



Potential usefulness of ferry service for...

77% ...me personally

98% ...my community

Satisfaction with service (residents aware of service)

★ ★ ★ **83%** satisfied or very satisfied with ferry service

Compared with % satisfied or very satisfied with...

71% Bus **95%** Train **81%** Taxi / rideshare **0%** Water taxi
Low sample (n=3)



Expectations of service

% of residents who expect ferry service to be good or very good

92% Safety

91% Being an enjoyable way to travel

87% Being easy to get to where you catch it

86% How easy it is to get on and off the ferry

83% Customer service

82% How long it would take to get to your destination

80% Being easy to get where you needed to go at the other end

79% General cleanliness and condition of the ferry

71% Being available when you wanted or needed it

66% Hygiene during COVID

66% Value for money

Experiences with service



Use of transport services (all residents)

% who used service in...	...last 6 months	...last 12 months	...ever
Private ferry	30%	44%	82%
Bus	23%	28%	50%
Train	68%	71%	82%
Taxi / rideshare	45%	51%	64%
Water taxi	0%	0%	1%
Private vehicles	98%	99%	99%
Private boats	10%	12%	28%

Looking forward

Travel intentions over next 12 months

% who intend to use the ferry...

▲ **20% more**

73% about the same

▼ **7% less**

+13% Nett change

Top 3 changes that would have at least a small effect on increasing use

🔄 **46%** more stops

\$\$\$ **42%** cheaper fares

🕒 **37%** shorter wait times

Users (n=40)

Experiences of most recent trip



Purpose top 2 reasons

83% recreation or social activity

5% work / shopping / other



55% Destination choice at least partly influenced by ferry route

Time taken to get to...

	< 5 mins	6-10 mins	11+ mins
... ferry	31%	38%	33%
... destination	38%	30%	33%



93% rated overall value for money as at least adequate (adequate, good, or very good)



98% At least partly satisfied with most recent trip

% users who rated aspects as at least adequate (adequate, good or very good)



100% being on time



97% cleanliness and condition of ferry



97% customer service



91% timing / availability of service when you needed to travel



90% value for money

6

Captain Cook Cruises Lane Cove

Captain Cook Cruises operates the route between Circular Quay and Lane Cove under contract with Transport for NSW.

Summary of results from IPART NSW Private Ferry Survey 2021



Residents (n=28-104)



27% Aware of ferry service

Of those aware of ferry service....

37% At least roughly aware of ferry route

12% Knew details of ferry route

Perceptions of service



Potential usefulness of ferry service for...

47%

...me personally

88%

...my community

Satisfaction with service (residents aware of service)



61% satisfied or very satisfied with ferry service

Compared with % satisfied or very satisfied with...

75% Bus **66%** Train **82%** Taxi / rideshare **26%** Water taxi



Expectations of service

% of residents who expect ferry service to be good or very good

74% Being an enjoyable way to travel

65% Safety

63% General cleanliness and condition of the ferry

57% How easy it is to get on and off the ferry

54% Customer service

52% Hygiene during COVID

44% Being easy to get where you needed to go at the other end

41% How long it would take to get to your destination

35% Being easy to get to where you catch it

34% Value for money

26% Being available when you wanted or needed it

Experiences with service



Use of transport services (all residents)

% who used service in...	...last 6 months	...last 12 months	...ever
Private ferry	8%	20%	20%
Bus	82%	85%	98%
Train	31%	34%	42%
Taxi / rideshare	67%	72%	89%
Water taxi	3%	5%	20%
Private vehicles	94%	96%	96%
Private boats	9%	12%	27%

Looking forward

Travel intentions over next 12 months

% who intend to use the ferry...

▲ **24%** more

66% about the same

▼ **10%** less

+14% Nett change

Top 3 changes that would have at least a small effect on increasing use



62% shorter wait times



56% more stops



56% cheaper fares

Users (n=8 – low sample)

Experiences of most recent trip



Purpose top 2 reasons

63% work

13% study / medical appt



25% Destination choice at least partly influenced by ferry route

Time taken to get to...



... ferry

< 5 mins

6-10 mins

11+ mins

... destination

25%

0%

75%

13%

50%

38%



100% rated overall value for money as at least adequate (adequate, good, or very good)



88% At least partly satisfied with most recent trip

% users who rated aspects as at least adequate (adequate, good or very good)



88% being on time



88% value for money



87% cleanliness and condition of ferry



76% timing / availability of service when you needed to travel



76% customer service

7

Palm Beach

Palm Beach Ferries operate routes from Palm Beach to Ettalong via Wagstaffe and Palm Beach to Mackerel with stops at Bennets, Bonnie Doon, the Basin and Currawong.



Summary of results from IPART NSW Private Ferry Survey 2021

Residents (n=27-104)



88% Aware of ferry service

Of those aware of ferry service....

88% At least roughly aware of ferry route

55% Knew details of ferry route

Perceptions of service



Potential usefulness of ferry service for...

70%

...me personally

97%

...my community

Satisfaction with service (residents aware of service)



90%

satisfied or very satisfied with ferry service

Compared with % satisfied or very satisfied with...

78% Bus **85%** Train **72%** Taxi / rideshare **26%** Water taxi



Expectations of service

% of residents who expect ferry service to be good or very good

- 94% Being an enjoyable way to travel
- 88% How easy it is to get on and off the ferry
- 87% Safety
- 87% Customer service
- 85% General cleanliness and condition of the ferry
- 75% How long it would take to get to your destination
- 71% Being easy to get to where you catch it
- 68% Being available when you wanted or needed it
- 64% Hygiene during COVID
- 62% Being easy to get where you needed to go at the other end
- 53% Value for money

Experiences with service



Use of transport services (all residents)

% who used service in...	...last 6 months	...last 12 months	...ever
Private ferry	32%	45%	80%
Bus	51%	63%	83%
Train	54%	61%	77%
Taxi / rideshare	45%	52%	67%
Water taxi	1%	2%	7%
Private vehicles	92%	96%	97%
Private boats	9%	10%	24%

Looking forward

Travel intentions over next 12 months

% who intend to use the ferry...

▲ **23%** more
67% about the same
 ▼ **10%** less
 +13% Nett change

Top 3 changes that would have at least a small effect on increasing use

\$\$\$ **66%** cheaper fares

🔄 **48%** more stops

🕒 **37%** shorter wait times

Users (n=63-67)

Experiences of most recent trip



Purpose top 2 reasons

78% recreation or social activity

10% work



67% Destination choice at least partly influenced by ferry route

Time taken to get to...



	< 5 mins	6-10 mins	11+ mins
... ferry	31%	36%	31%
... destination	36%	22%	41%



88% rated overall value for money as at least adequate (adequate, good, or very good)



94% At least partly satisfied with most recent trip

% users who rated aspects as at least adequate (adequate, good or very good)



98% cleanliness and condition of ferry



98% customer service



97% being on time



89% timing / availability of service when you needed to travel



82% value for money

II. Introduction

A. Background

The Independent Pricing and Regulatory Tribunal (IPART) provides independent regulatory decisions to balance the rights and needs of NSW citizens, taxpayers and service providers. In 2021 IPART is conducting a review to determine maximum fares for private ferry services from 1 January 2022 to 31 December 2025.

The review is considering private ferry services which operate under contract with Transport for NSW (TfNSW), and which are required to meet service standards, including providing a ferry timetable for a designated route. In return, most ferry operators are granted an exclusive right for their designated route and government subsidies for concession and school student travel. Some operators also receive financial viability payments from the NSW Government. The contracts provide that the operator's fare cannot exceed the maximum fare determined by IPART.

To inform the review, IPART commissioned a two-part survey focussing on seven relevant private ferry routes:

- Brooklyn Ferry Service
- Central Coast Ferries
- Church Point Ferry Service
- Clarence River Ferries
- Cronulla Ferries
- Captain Cook Cruises' Lane Cove to Circular Quay route
- Palm Beach Ferries

Two data collection activities were undertaken – a survey of residents of the immediate areas nearest to each route, and an on-board survey of users (only some routes chose to participate in this survey). The surveys collectively yielded two perspectives for analysis and reporting:

1. A '**residents**' sample, being people who are within the immediate catchment area of the ferry services, regardless of whether they use (or are even aware of) the ferry services; and
2. A '**users**' sample, being residents who use the ferries plus any other users identified through the on-board user survey.

See the methodology section below for more details of the two samples and how they should be appropriately interpreted. The results from the two samples are kept separate throughout the report, and clearly identified at all times (through footnotes and colour coding).

Results in the report are presented at the level of each route. Because each route is an independent operation, and sampling was conducted at the level of each route, overall 'totals' are not meaningful. Generally an 'average' is provided by way of a point for comparison and to aid interpretation of the route-level results – but the overall average is not in itself meaningful, and should not be used as an over-arching indication of results without considerable care to the appropriateness of doing so.

The questionnaire was designed to facilitate some level of comparability to other IPART surveys, notably the annual *Point-to-Point Transport Survey*, and periodic *Rural and Regional Bus Users Survey*.

B. Research objectives

The primary aim of the survey is to collect data on people's use of private ferry services, including the reasons why they do, or do not use them, and the extent to which fares and other factors impact people's use of private ferries.

The surveys included questions about:

- Awareness and use of ferry services (including change in use)
- Satisfaction with ferry services
- Usefulness of ferry services
- Reasons for use
- Last trip details and satisfaction (for users)
- Perception of value
- Expectations of service quality and experience
- Factors that might increase use of ferries
- Impact of COVID on ferry use and confidence using ferries during COVID

C. Methodology

Major challenges for the overall survey were the small geographic catchment areas for the ferries, which impacts on the practicality of conducting resident surveys; and limitations on how the survey could be communicated to users of the ferry services. To address these challenges in a practical and cost-effective manner, the combined resident and user survey involved a variety of methodologies which were integrated and filtered for appropriate analysis.

Resident survey

The resident survey targeted n=100 respondents who lived within the immediate likely catchment area for each ferry route. As no data was available to determine the exact catchment for routes, an approach of targeting just the immediately adjacent suburbs was adopted. The allocation of suburbs to routes for the purposes of the resident survey can be seen in Appendix B. Even in potentially overlapping areas around the four Central Coast routes, adjacent areas were allocated to their nearest ferry for the purposes of the 'resident' survey (*note below that residents in these areas could also be surveyed as 'users' of other nearby ferries if they did not use their primary route*).

Because practical sample availability for phone or online surveys in the tightly defined geographic areas was very limited, a combination of online panel surveys followed by CATI (telephone) surveys was adopted. This process involved doing as many online surveys in the targeted regions as was possible, and then topping up to a maximum of n=100 surveys in total by using available phone numbers for CATI interviews. For all but one of the seven routes it was possible to get to the n=100 target using these combined methods.

Because sample was so limited in most routes that it was a challenge to achieve the target samples, no demographic quotas were able to be applied. Quotas are usually used to manage the representativeness of a sample to approximate population proportions on characteristics such as age

and gender. In this case, it was not possible to do this as there were not enough potential respondents to screen some of them out, and so the final samples for each route reflect the characteristics of residents who were reached and who agreed to do the survey. For the phone surveys in particular, this resulted in a very old age profile for respondents.

Because of the different methods that needed to be used to generate surveys in such specific locations, the variation across routes, the lack of known population benchmarks, and the small absolute sample sizes involved, it was decided to take the simplest approach to representing the data. The raw samples from online and phone methods were combined, and no weighting applied. The tables below show the characteristics of each route's sample, and these should be considered when interpreting both the individual route results, and comparisons between them.

Table M1: Sample sizes by route

Route	Online panel	CATI	Total residents	Residents who used [^]	Residents who used different ferry [^]	On-board user survey	Total users
Brooklyn	1	68	69	27	6	43	76
Central Coast	31	70	101	19	4	2	25
Church Point	49	55	104	12	30	19	61
Clarence River	9	95	104	36	-	-	36
Cronulla	50	49	99	40	-	-	40
Captain Cook	85	19	104	7	20	-	27
Palm Beach	30	74	104	44	-	23	67
Total	255	430	685	185	60	87	332

[^] Used within the last 12 months. Note that initially user questions in the resident survey were based on use within the last 6 months, but this was increased to 12 months to enable a larger sample size. Some early respondents to the survey who last used a ferry 7-12 months ago were not asked the user section.

Table M2: Resident survey age groups by route ^{Q2}

Residents	Brooklyn	Central Coast	Church Point	Clarence River	Cronulla	Captain Cook	Palm Beach	All regions combined
Sample size	69	101	104	104	99	104	104	685
16 to 19	0%	1%	1%	0%	1%	4%	1%	1%
20 to 29	7%	5%	8%	3%	6%	16%	4%	7%
30 to 39	0%	11%	2%	7%	10%	17%	6%	8%
40 to 49	10%	8%	7%	3%	7%	19%	15%	10%
50 to 59	16%	15%	14%	12%	17%	13%	9%	13%
60 to 69	25%	17%	26%	27%	30%	14%	22%	23%
70 to 79	30%	33%	32%	29%	18%	13%	29%	26%
80 and over	12%	11%	11%	20%	10%	4%	14%	12%

Table M3: User survey age groups by route Q2 (Q3 User Survey)

<i>Users</i>	Brooklyn	Central Coast	Church Point	Clarence River	Cronulla	Captain Cook	Palm Beach	All routes combined
<i>Sample size</i>	77	27	62	38	44	28	73	349
16 to 19	0%	4%	6%	0%	0%	4%	0%	2%
20 to 29	3%	4%	5%	3%	2%	18%	10%	6%
30 to 39	5%	19%	3%	5%	7%	14%	4%	7%
40 to 49	22%	15%	18%	0%	5%	14%	16%	14%
50 to 59	19%	15%	13%	8%	18%	21%	8%	14%
60 to 69	29%	15%	23%	32%	32%	11%	27%	26%
70 to 79	18%	26%	24%	34%	27%	11%	26%	24%
80 and over	4%	4%	8%	18%	9%	7%	7%	8%

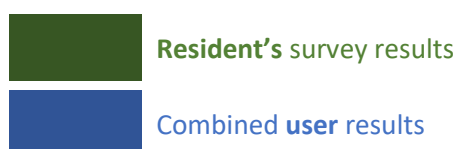
A copy of the questionnaires used can be seen in Appendix A. Further demographic details of the samples are in Appendix C.

III. Detailed Results

Reader Notes

Results from the ferry survey are reported by individual route. In many cases an ‘all routes average’ is also shown. This doesn’t apply any weighting to the routes, but rather looks at the average of all respondents. This is provided simply to assist readers interpret the patterns and differences by route – but the average generally has no inherent meaning, and should not be reported as a total result with consideration to its meaning.

Throughout the survey, **results are colour coded** to assist in identifying the source.



i Note that results are not weighted, but use the unweighted combined surveys from across the various data collection activities that are relevant for each result. Please see the methodology section for information about the age profile of respondents. This is particularly important for the resident survey, where the CATI phone sample in particular had an older age profile.

i Note that throughout the report where sample sizes drop below a minimum threshold of n=20 for any subsample, these results are shown in grey or semi-transparent form, or marked with an asterisk (*). These results should be interpreted with caution as being indicative only.

Throughout the report, in most charts value labels <5% are not shown to assist with the readability of the graphics.

A. Resident Survey Results

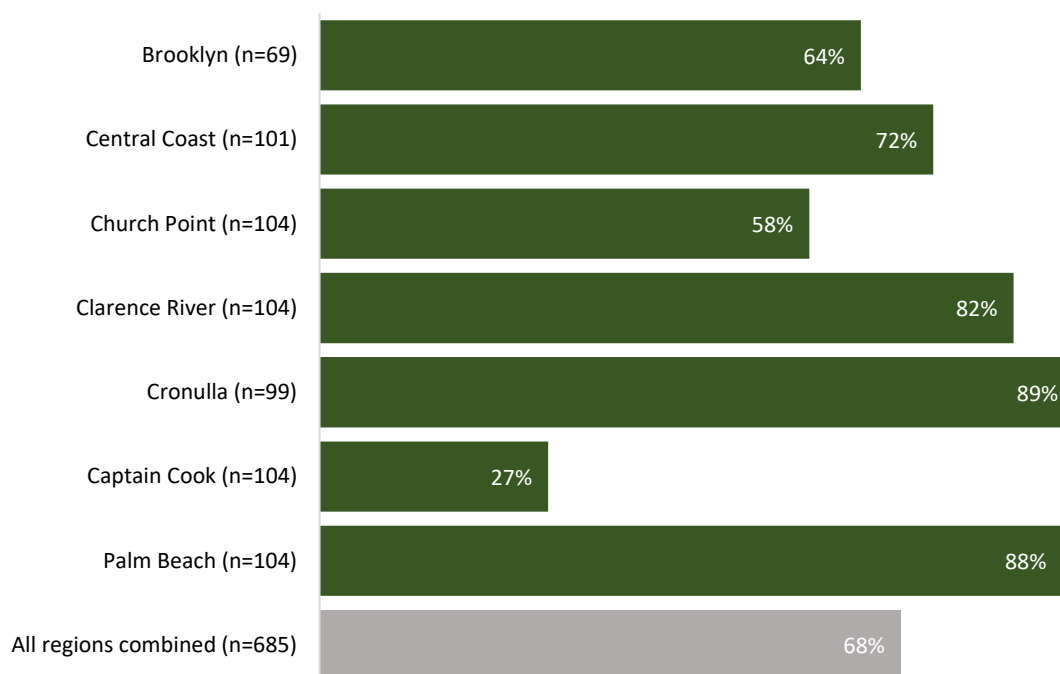
This section of the report is based on results from the resident survey. Tightly defined geographic catchment areas around each ferry route were identified, defined at the suburb level (see Appendix B). Residents in these catchment areas were surveyed on their awareness, usefulness, use of and perceptions of the specified ferry service. Where they had used the ferry within the last 12 months they were also asked a set of questions about their last trip. These results are reported along with any other users surveyed in the next section of this report. A target sample size of n=100 per route was set, with this being achieved for all but one route. Note that because of sample availability and a hybrid of methodologies being used, the sample for each route has not been weighted. See the methodology section for profiles of the samples available for analysis, and note the older age profile when interpreting these results.

Results are presented by route, and the overall *all routes combined* figures are only shown to aid with interpretation. These averages should not be used to represent overall results.

Awareness of Ferry Services

Awareness of the specified private ferry routes varied considerably, but was moderate-to-high in all areas other than for the Captain Cook Cruises Lane Cove to Circular Quay route. Church Point and Brooklyn routes had the next lowest awareness, but both were well above half the total residents surveyed.

Figure 1: Awareness of local ferry route (Residents) ^{Q4}



Knowledge of Ferry Service Routes

Residents in the immediate catchments for all routes other than the Captain Cook Cruises Lane Cove route generally had at least some knowledge of the route description given to them (including some of the residents who did not consider themselves aware of the route when prompted with its name).

Over 80% of residents in the areas linked to the Brooklyn, Clarence River and Cronulla ferry services said they felt they *knew the details* of the route. Most of those near the Central Coast, Church Point and Palm Beach routes indicated that they *at least roughly knew where it went*. Only around a third of those in the vicinity of the Lane Cove route felt they knew even roughly where the ferry route went.

Table 1: Prior knowledge of details of route? ^{Q8}

Residents	Brooklyn	Central Coast	Church Point	Clarence River	Cronulla	Captain Cook	Palm Beach	All routes combined
<i>Sample size</i>	69	101	104	104	99	104	104	685
Knew the details of the route	80%	49%	34%	91%	84%	12%	55%	56%
Knew roughly where it went	9%	32%	45%	5%	13%	25%	33%	24%
Didn't know much about where the ferry went	7%	10%	14%	1%	1%	25%	10%	10%
Didn't know about the ferry route at all	4%	10%	7%	3%	2%	38%	3%	10%

Usefulness of Ferry Services

Residents were asked to consider how useful or potentially useful a ferry that services each route was to them, both overall and for a variety of specific purposes. They were also asked to consider how useful a ferry servicing this route was to their community more generally.

Overall, residents thought that each of the routes was important to their community. **More than 88% of residents surveyed said that a ferry that serviced their route was *at least quite useful* to their community.** For the Brooklyn, Church Point, Cronulla and Palm Beach, around a half or more of the surveyed residents described the service as *essential* to their community.

Ratings of overall personal usefulness were somewhat lower than for the community, with 47%-77% describing the route as *at least quite useful to them personally* for all routes other than Church Point, where a considerably lower proportion of residents said it was *at least quite useful* to them (24%).

The most common purpose that residents saw each of the ferry routes as being potentially useful was for social and recreational purposes, with work purposes the next most common. This reflects the most common reasons for use seen in the users' last trip section.

Table 2: Potential usefulness of a ferry service by purpose (Residents) ^{Q9}

% at least quite useful	Brooklyn	Central Coast	Church Point	Clarence River	Cronulla	Captain Cook	Palm Beach	All routes combined
<i>Sample size</i>	69	101	104	104	99	104	104	685
Work purposes (if work)	39%	31%	6%	23%	43%	42%	38%	33%
Study (if study)	*	*	*	*	*	*	*	*
Shopping	33%	17%	11%	15%	27%	25%	9%	19%
Medical appointments	30%	12%	9%	9%	20%	4%	10%	12%
Social / recreation	67%	64%	46%	76%	80%	64%	78%	68%
Children to school	12%	7%	8%	2%	19%	7%	3%	9%
Overall - personally	48%	50%	24%	61%	77%	47%	70%	54%
Overall – to community	90%	95%	98%	97%	98%	88%	97%	95%

** in the survey only n=9 people reported studying and this data is too small to report*

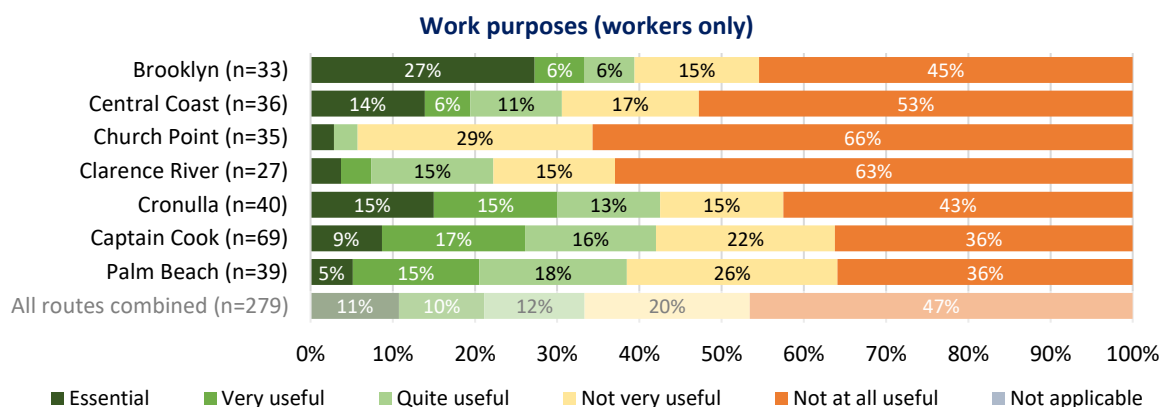
The following tables and charts show the detailed breakdown of perceived usefulness of each route.

Table 3: Overall usefulness of local route ^{Q9}

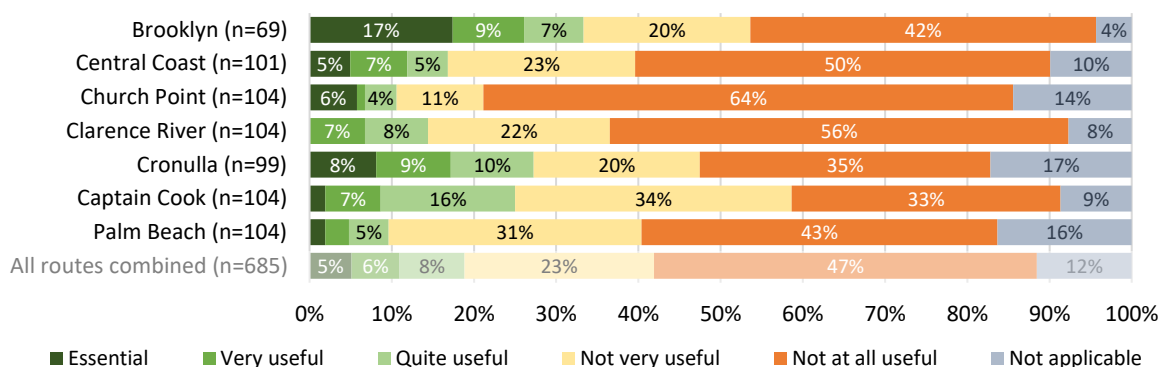
<i>Residents</i>	Brooklyn	Central Coast	Church Point	Clarence River	Cronulla	Captain Cook	Palm Beach	All routes combined
<i>Sample size</i>	67	100	98	101	98	99	100	663
Overall usefulness for me personally								
Essential	27%	7%	4%	10%	21%	10%	18%	13%
Very useful	9%	16%	7%	19%	28%	12%	22%	16%
Quite useful	12%	27%	13%	33%	28%	25%	30%	25%
Not very useful	15%	26%	32%	25%	16%	38%	17%	25%
Not at all useful	37%	24%	44%	14%	7%	14%	13%	21%
Useful to me personally	48%	50%	24%	61%	77%	47%	70%	54%
Not useful	52%	50%	76%	39%	23%	53%	30%	46%
Overall usefulness for the community								
Essential	72%	28%	60%	42%	61%	22%	56%	48%
Very useful	7%	41%	22%	32%	27%	33%	26%	28%
Quite useful	10%	26%	16%	23%	10%	34%	15%	20%
Not very useful	3%	5%	2%	3%	2%	9%	3%	4%
Not at all useful	7%	0%	0%	0%	0%	3%	0%	1%
Useful to the community	90%	95%	98%	97%	98%	88%	97%	95%
Not useful	10%	5%	2%	3%	2%	12%	3%	5%

Figure 2: Regardless of how often you currently use it, how potentially useful to you personally is a ferry service that goes [local route description] (Residents) ^{Q9}

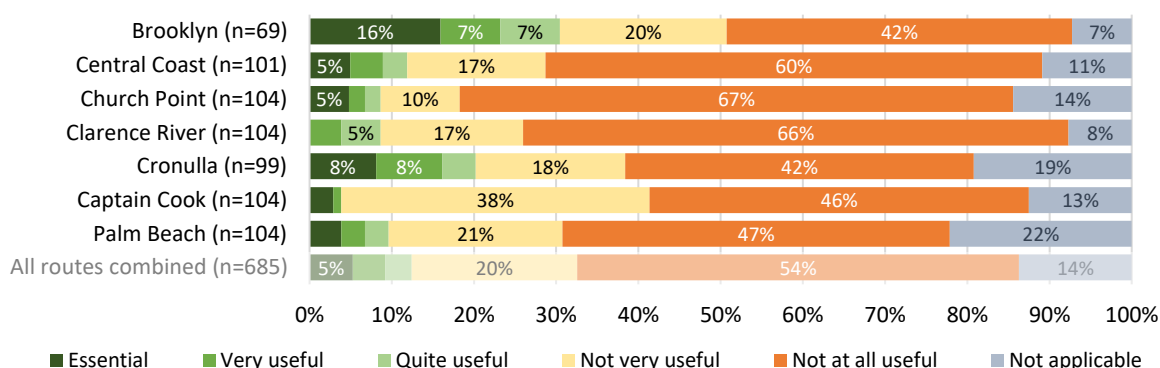
Base: Workers and students only for applicable questions; all respondents for all other questions



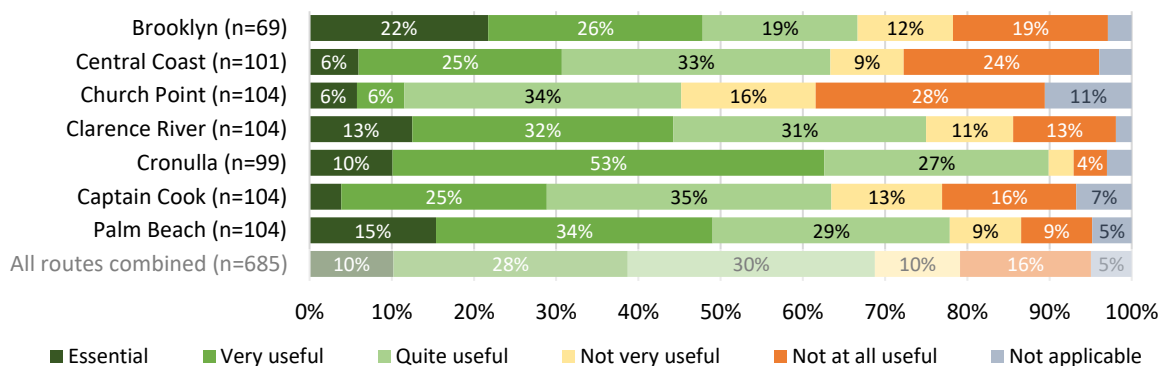
Shopping



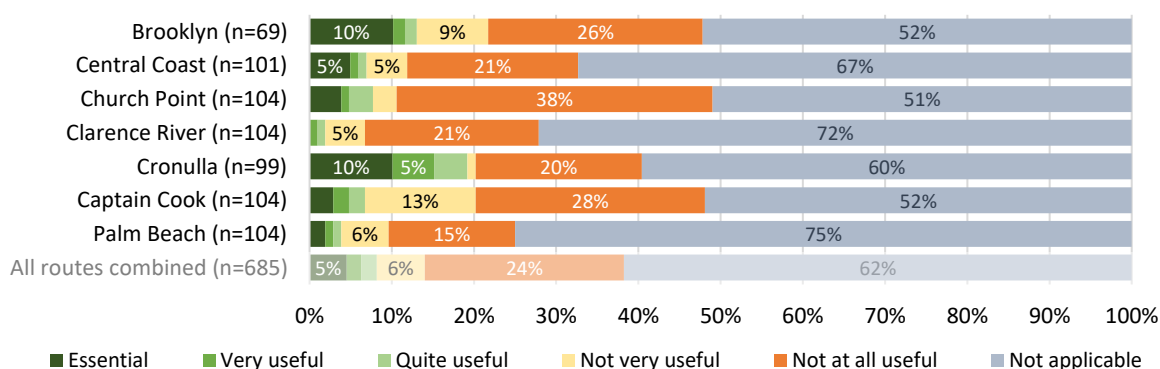
Medical appointments



Social or recreational purposes



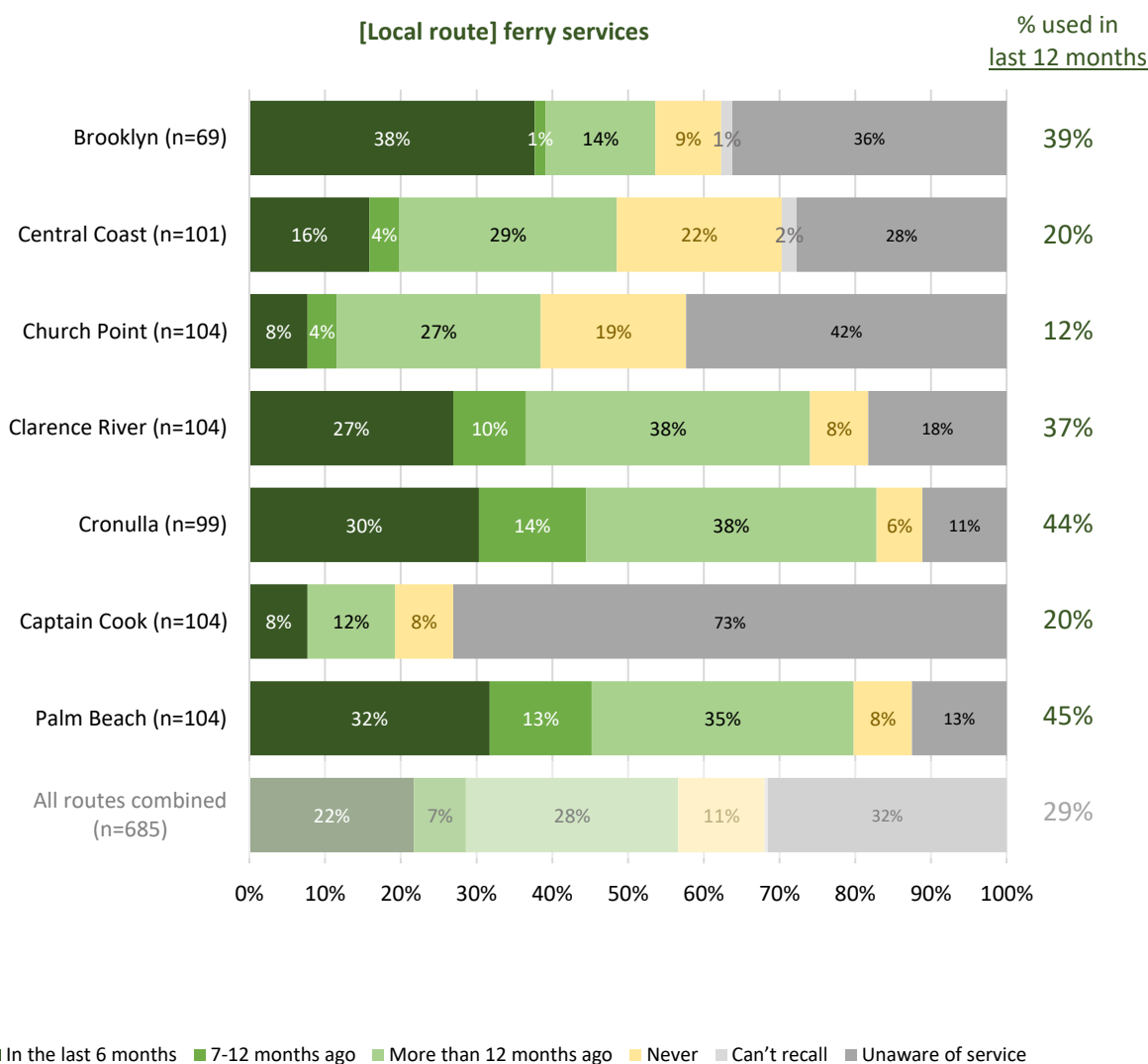
Children in the household to get to school



Usage of Ferry Services

Usage of the routes was somewhat correlated with awareness, but least so in Brooklyn where a higher proportion of residents who were aware of the ferry service had also used it in the last 6 months in particular. For all routes, only a minority of residents were aware of the ferry service but had *never* used it.

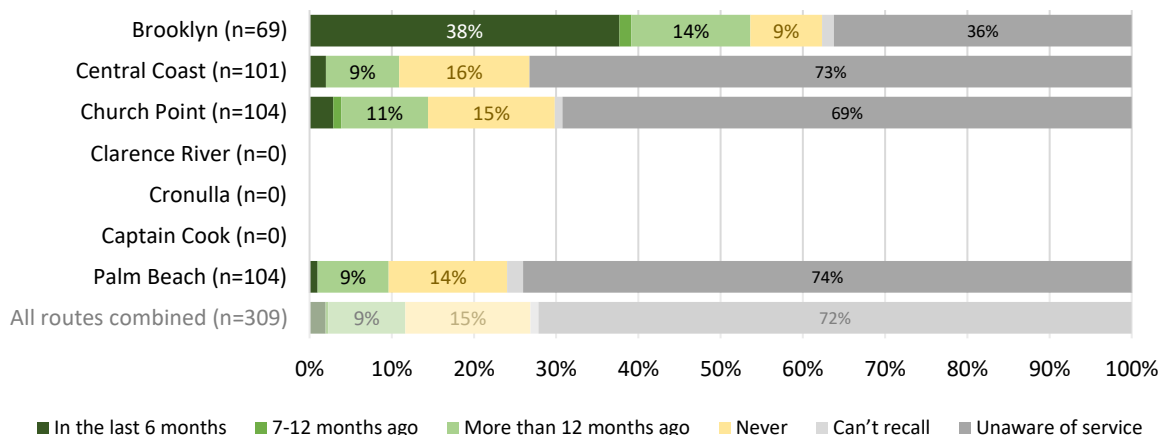
Figure 3: Use of transport services (Residents) Q4, Q5



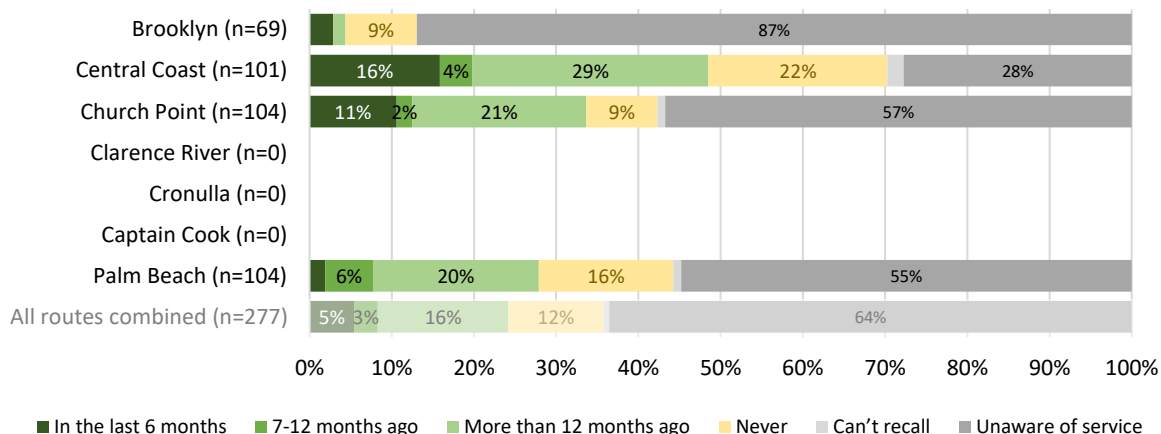
In the Central Coast area there are four private ferry services in close proximity. For the purposes of the resident survey suburbs were allocated to their closest route in order to measure awareness and use. However, residents in these locations were also asked about their use of the other nearby services.

The next set of charts below show the reported use of *other* routes in the survey by residents surveyed about their closest ferry route.

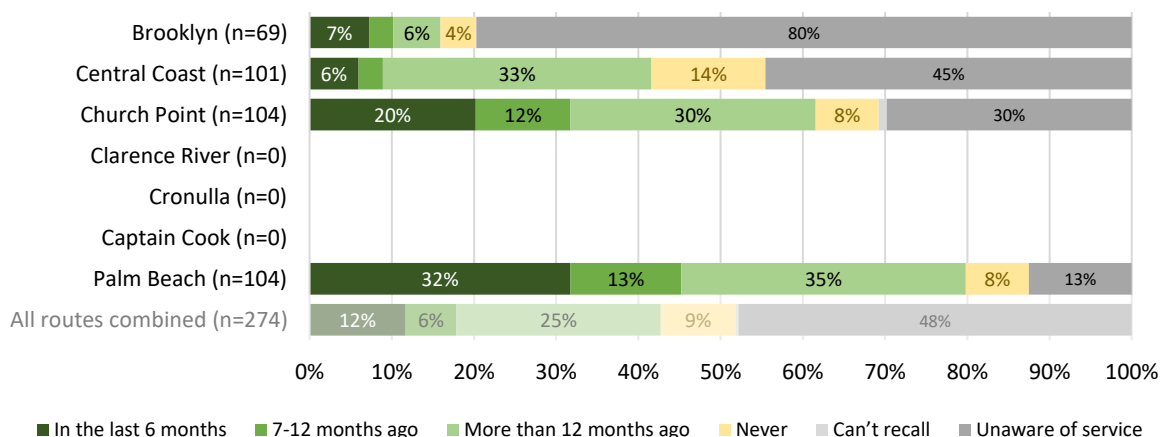
Brooklyn ferry services*



Central Coast ferry services*



Palm Beach ferry services*



* Asked of respondents in nearby locations (primary route usage included in chart for comparison)

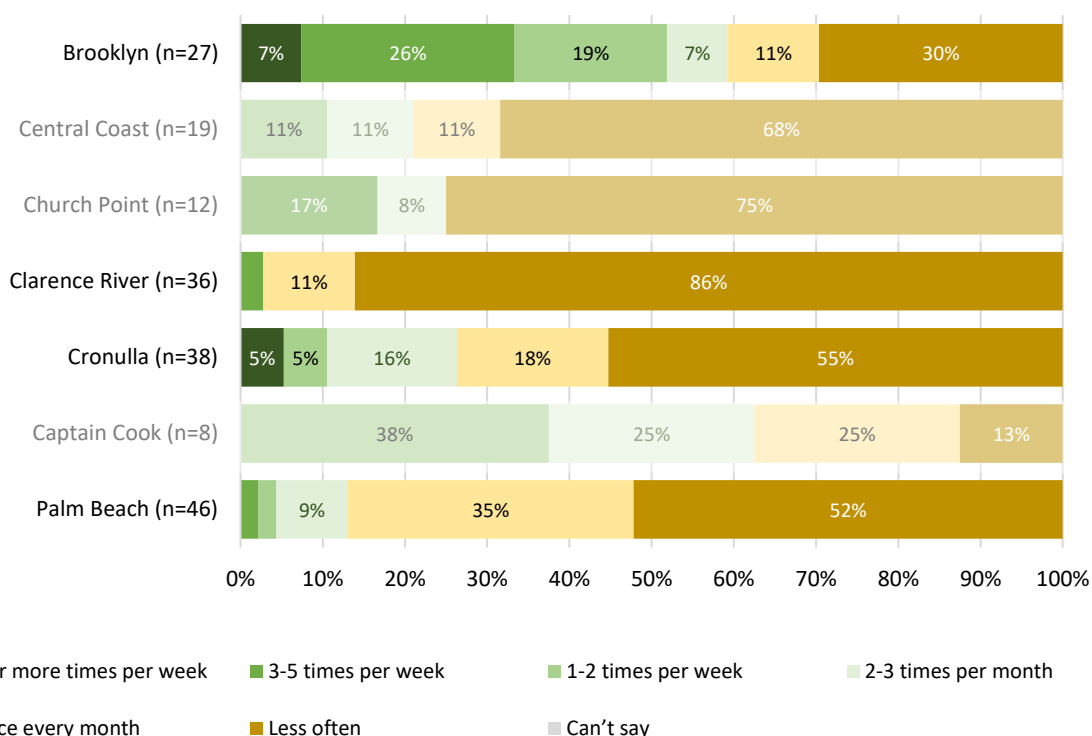
Amongst the small groups of 'resident users' identified for each route, those who used the Brooklyn route reported the highest frequency of use. Around half the 27 Brooklyn resident users reported using the ferry at least weekly.

Of the other three routes with similar sample sizes, less than 10% reported weekly use. Nearly half reported monthly use for the Palm Beach and Cronulla ferries, and around 1-in-8 for the Clarence River ferry.

Figure 4: Of the types of transport you have used in the last 12 months, on average about how many times have you used them to travel to or from your local area? (Residents) ^{Q10}

Base: Those who used each transport option.

[Local route] ferry services available to you



For each of the Central Coast region ferries, residents were also asked about their use of the other nearby private ferry routes. While a small number of such users were identified, only isolated individuals were regular users, with most indicating their use of these other ferry services was less than monthly.

Samples of residents who had used each route in the last 12 months were small, but for every route more of them indicated they had used the ferries *less* in the last 12 months than *more*. Across all the residents who had used their nearest ferry in the last 12 months, around 1-in-4 had used them less, and just 1-in-10 had used them more.

Table 4: In the last year have you used [local route] ferry more, less or the same amount? ^{Q11}

Residents <i>Only includes primary route</i>	Brooklyn	Central Coast	Church Point	Clarence River	Cronulla	Captain Cook	Palm Beach	All routes combined
<i>Sample size</i>	27	20	12*	38	44	8*	47	196
More	15%	5%	8%	11%	9%	25%	11%	11%
The same	56%	55%	75%	71%	68%	50%	53%	62%
Less	30%	40%	17%	16%	23%	25%	34%	27%
Can't say	0%	0%	0%	3%	0%	0%	2%	1%
Net difference (more minus less)	-15%	-35%	-8%	-5%	-14%	0%	-23%	-16%

Of the small number who had used their nearest ferry more often in the last 12 months (n=21), only 5 said that was *completely or mostly* due to COVID. Of the 52 who had used their nearest ferry less often, 30 of them said that this was *mostly or completely* due to COVID.

Taken together, this suggests that the impact of COVID on use of ferries was to reduce usage.

Table 5: Extent to which increased/decreased use of the route is due to COVID-19 ^{Q12}

Residents <i>Only includes primary route</i>	Brooklyn	Central Coast	Church Point	Clarence River	Cronulla	Captain Cook	Palm Beach	All routes combined
For those using the route <u>more</u>...								
<i>Sample size</i>	4	1	1	4	4	2	5	21
Completely	0%	0%	0%	0%	0%	0%	0%	0%
Mostly	25%	0%	0%	25%	25%	50%	20%	24%
Somewhat	25%	0%	0%	0%	25%	50%	0%	14%
Not very much	25%	0%	0%	50%	25%	0%	60%	33%
Not related to COVID at all	25%	100%	100%	25%	25%	0%	20%	29%
For those using the route <u>less</u>...								
<i>Sample size</i>	8	8	2	6	10	2	16	52
Completely	25%	25%	100%	33%	0%	100%	50%	35%
Mostly	0%	25%	0%	0%	50%	0%	38%	25%
Somewhat	25%	0%	0%	17%	20%	0%	0%	10%
Not very much	0%	13%	0%	0%	10%	0%	0%	4%
Not related to COVID at all	50%	38%	0%	50%	20%	0%	13%	27%

Awareness and Usage of Other Transport Options

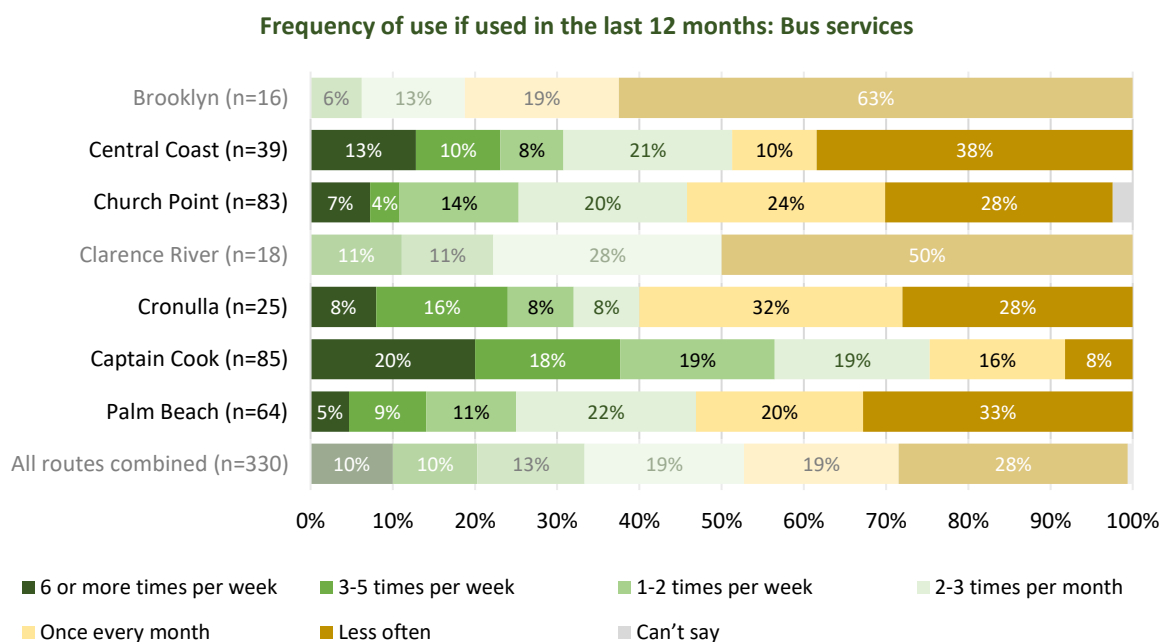
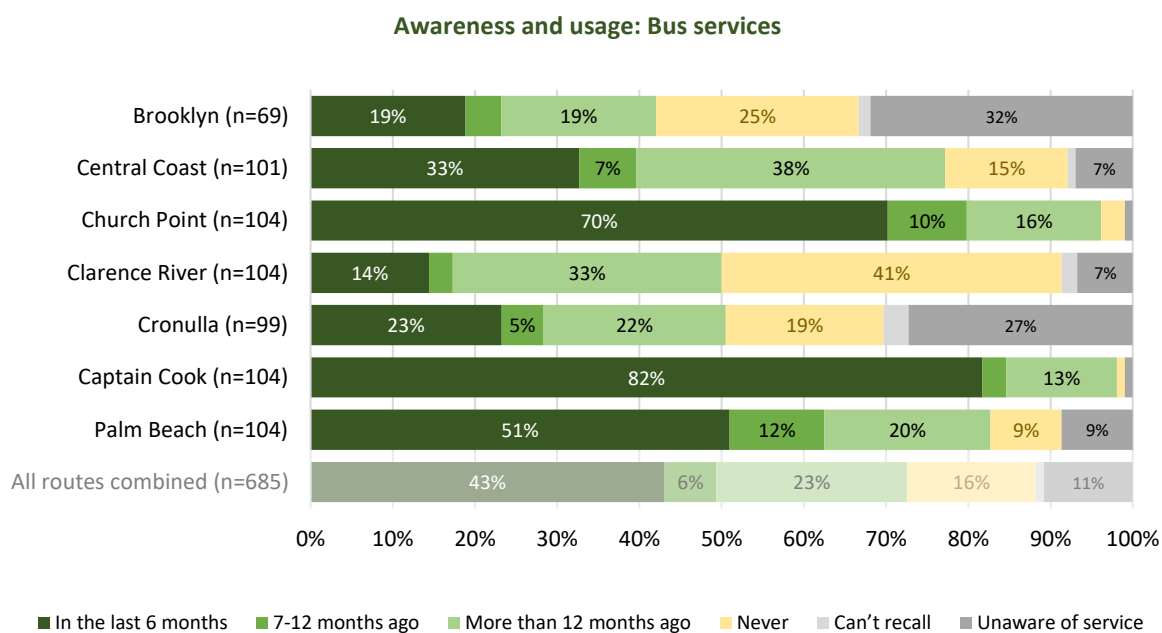
Awareness and use of other transport options naturally varied very considerably across services and locations, with availability of public transport options in particular being variable. Interestingly, in all locations there were at least some residents who considered that all transport options were available in some form for them to travel to and from their local area.

Residents who used each form of transport to get to or from their local areas in the last 12 months were also asked to provide information about how frequently they used them in the last 12 months.

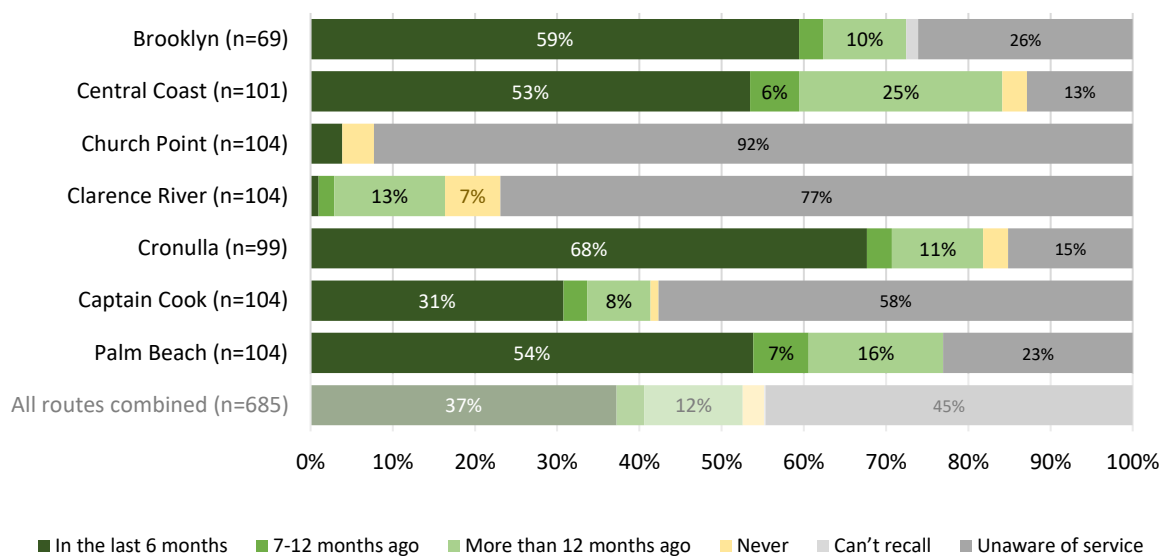
Table 6: Awareness and use of transport options. ^{Q36}

	Brooklyn	Central Coast	Church Point	Clarence River	Cronulla	Captain Cook	Palm Beach	All routes combined
<i>Sample size</i>	69	101	104	104	99	104	104	685
Buses								
Aware of service	68%	93%	99%	93%	73%	99%	91%	89%
Used in last 12 months	23%	40%	80%	17%	28%	85%	63%	49%
Trains								
Aware of service	74%	87%	8%	23%	85%	42%	77%	55%
Used in last 12 months	62%	59%	4%	3%	71%	34%	61%	40%
Taxi / rideshare								
Aware of service	35%	85%	91%	72%	75%	93%	82%	78%
Used in last 12 months	11%	36%	51%	21%	51%	72%	52%	43%
Water taxis								
Aware of service	64%	22%	47%	2%	3%	37%	26%	27%
Used in last 12 months	22%	1%	6%	0%	0%	5%	2%	5%
Private vehicles								
Aware of service	100%	100%	100%	100%	100%	100%	100%	100%
Used in last 12 months	94%	87%	94%	97%	99%	96%	96%	96%
Private boats								
Aware of service	100%	98%	97%	99%	97%	98%	98%	98%
Used in last 12 months	41%	12%	28%	21%	12%	12%	10%	18%

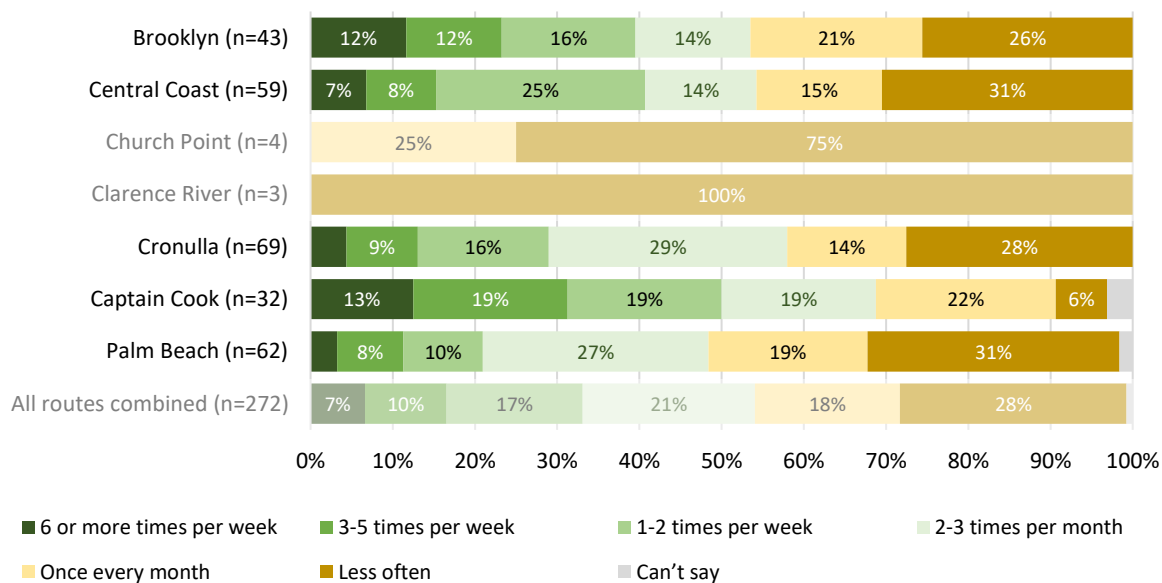
Figure 5: Awareness and usage of transport services? (Residents) Q4/5/10



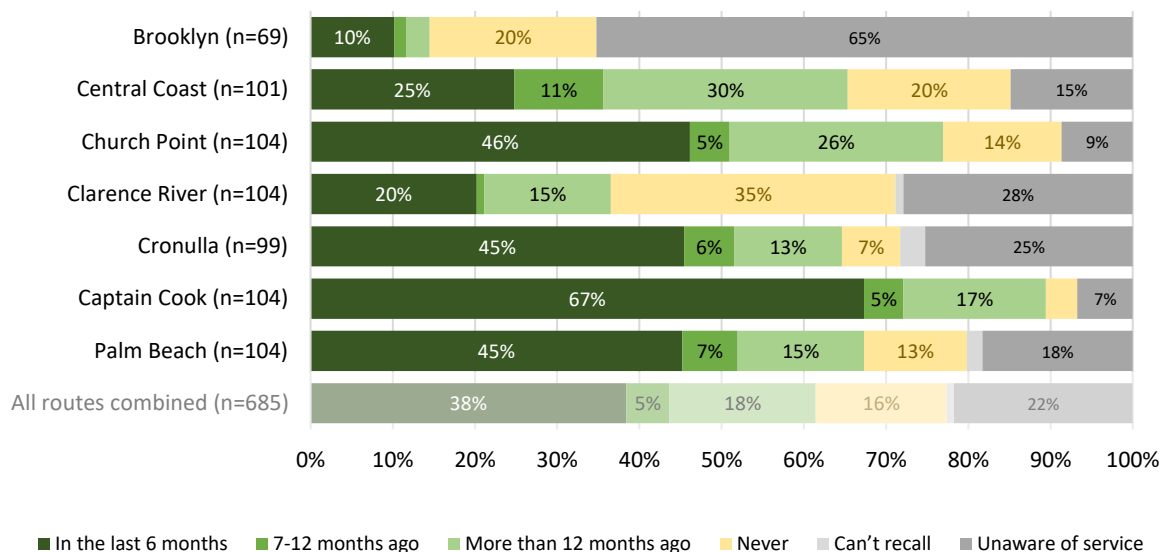
Awareness and usage: Train services



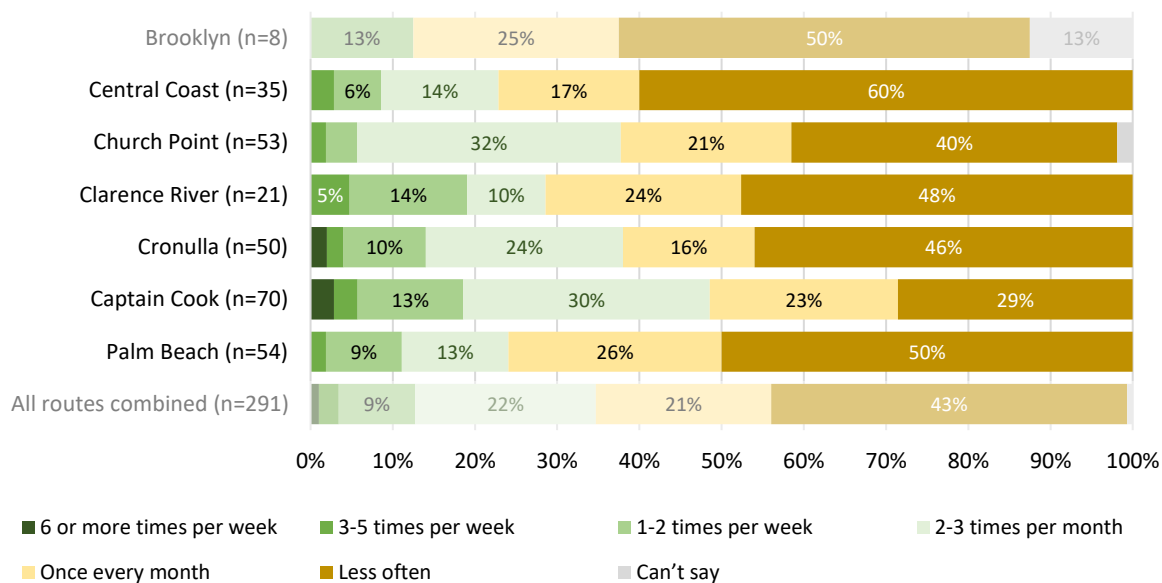
Frequency of use if used in the last 12 months: Train services



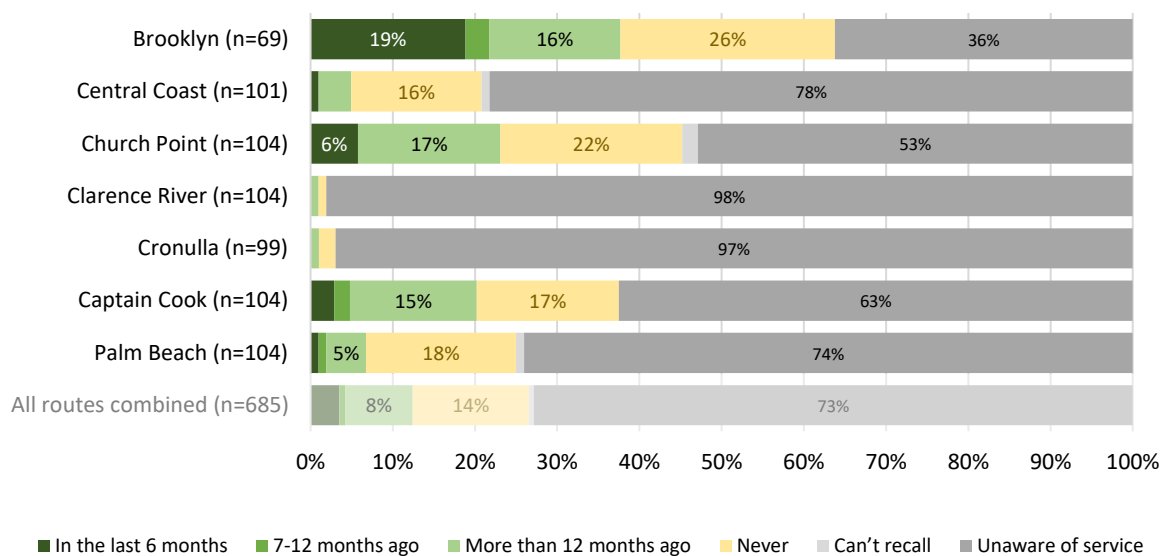
Awareness and usage: Taxi / rideshare services



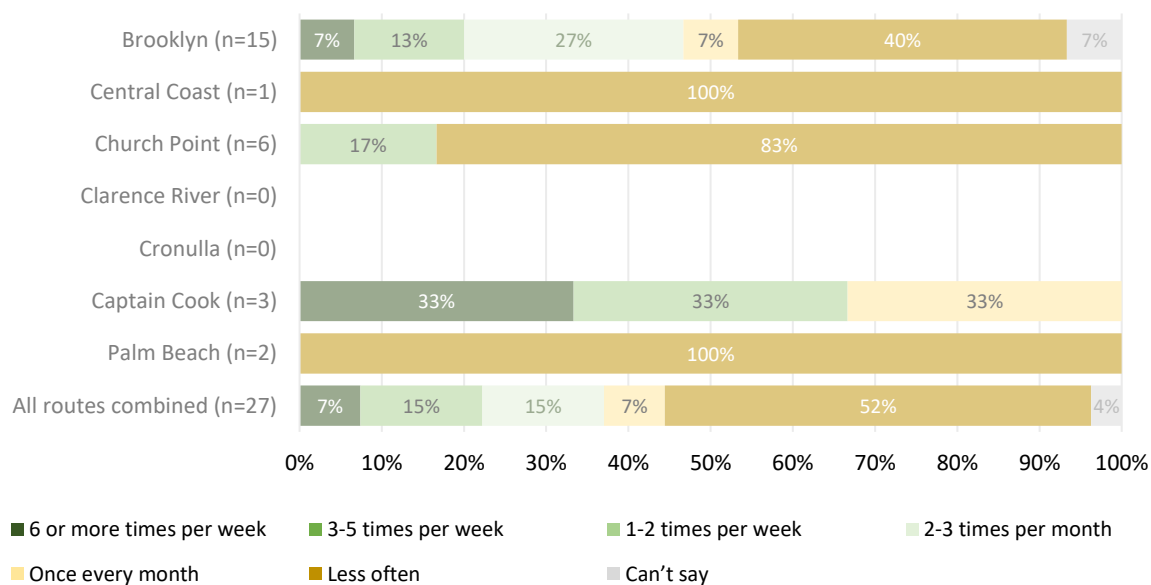
Frequency of use if used in the last 12 months: Taxi / rideshare services



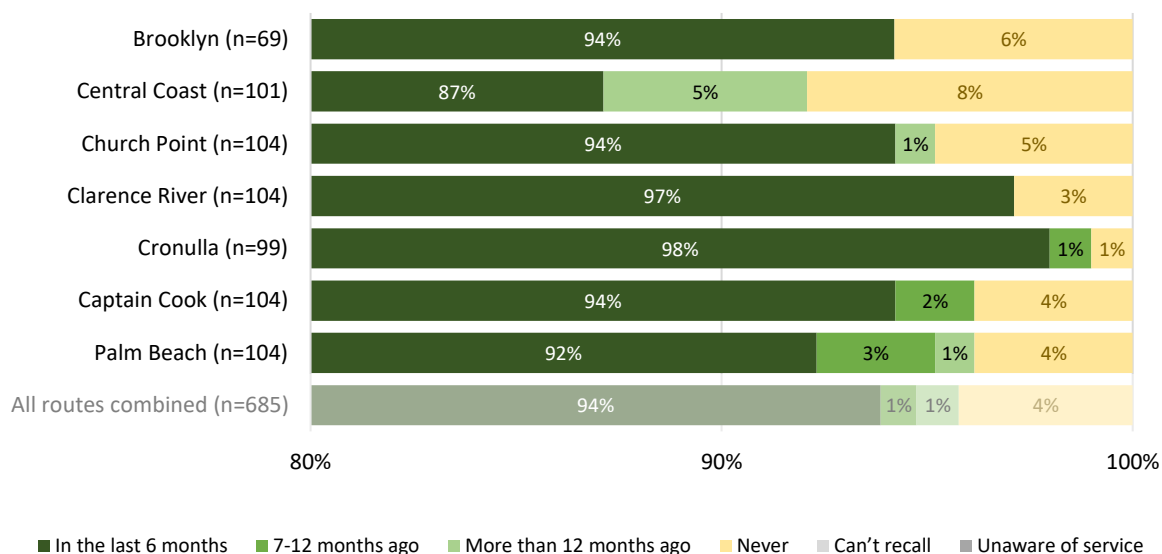
Awareness and usage: Water taxi services



Frequency of use if used in the last 12 months: Water taxi services

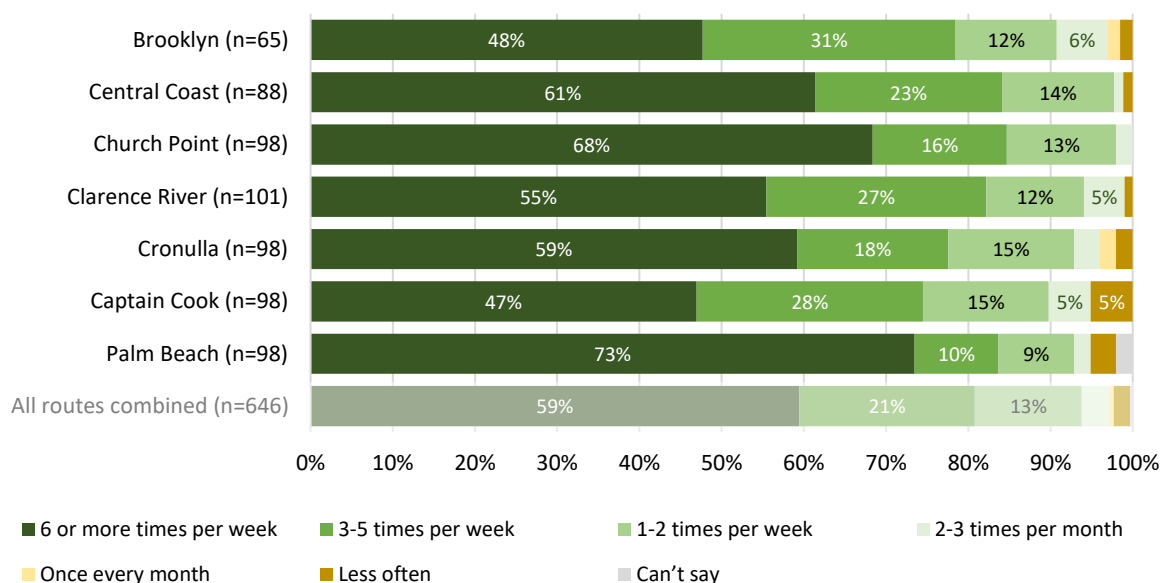


Awareness and usage: Private vehicles (cars or motorbikes)

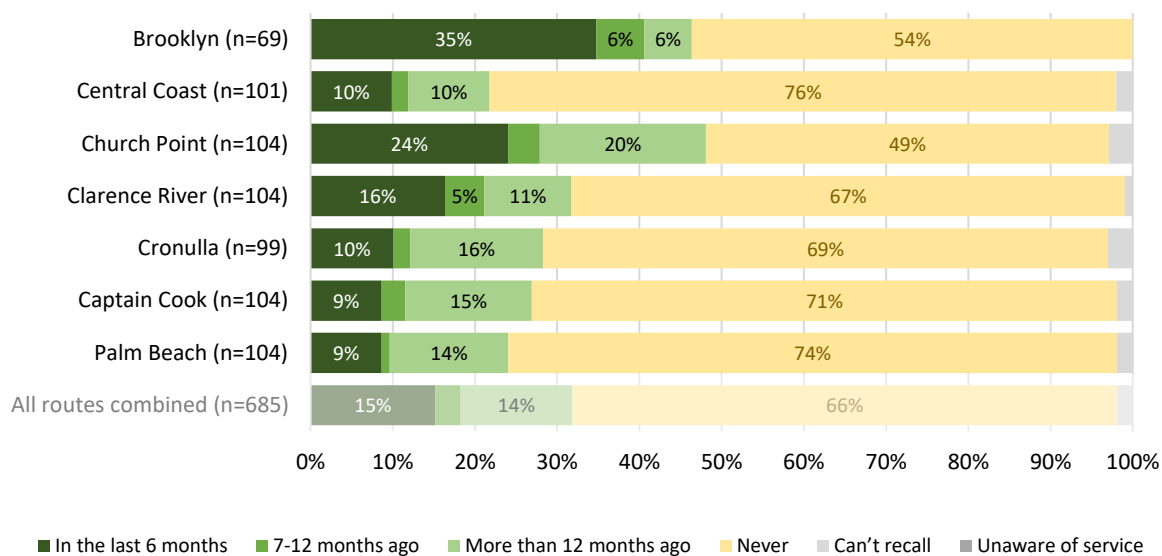


Note compacted scale used for the private vehicles chart, as recent usage was over 90% in all locations.

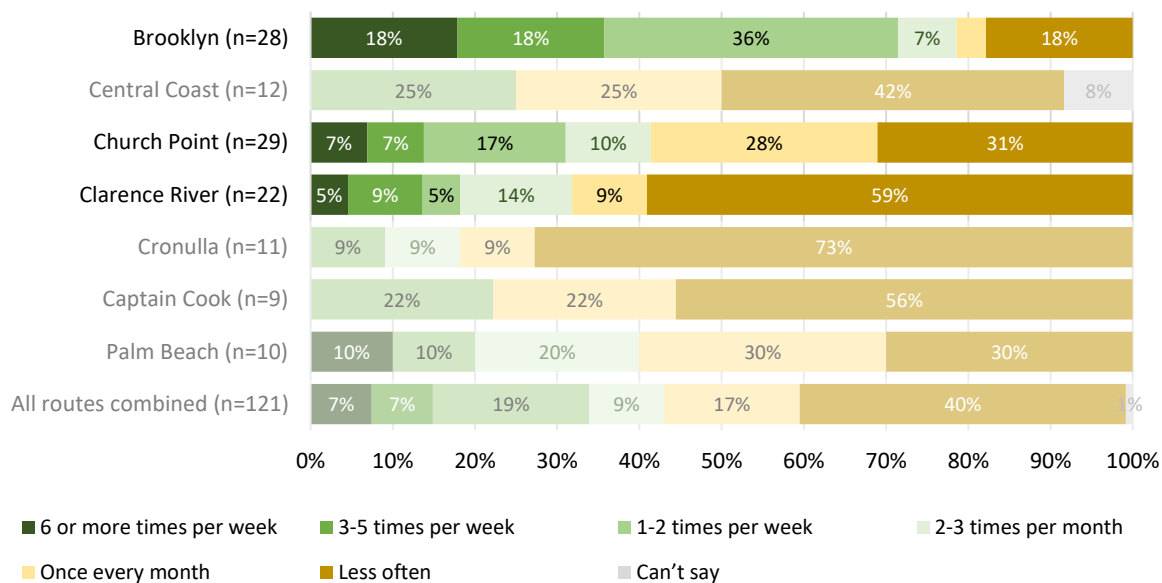
Frequency of use if used in the last 12 months: Private vehicles (cars or motorbikes)



Awareness and usage: Private boats



Frequency of use if used in the last 12 months: Private boats



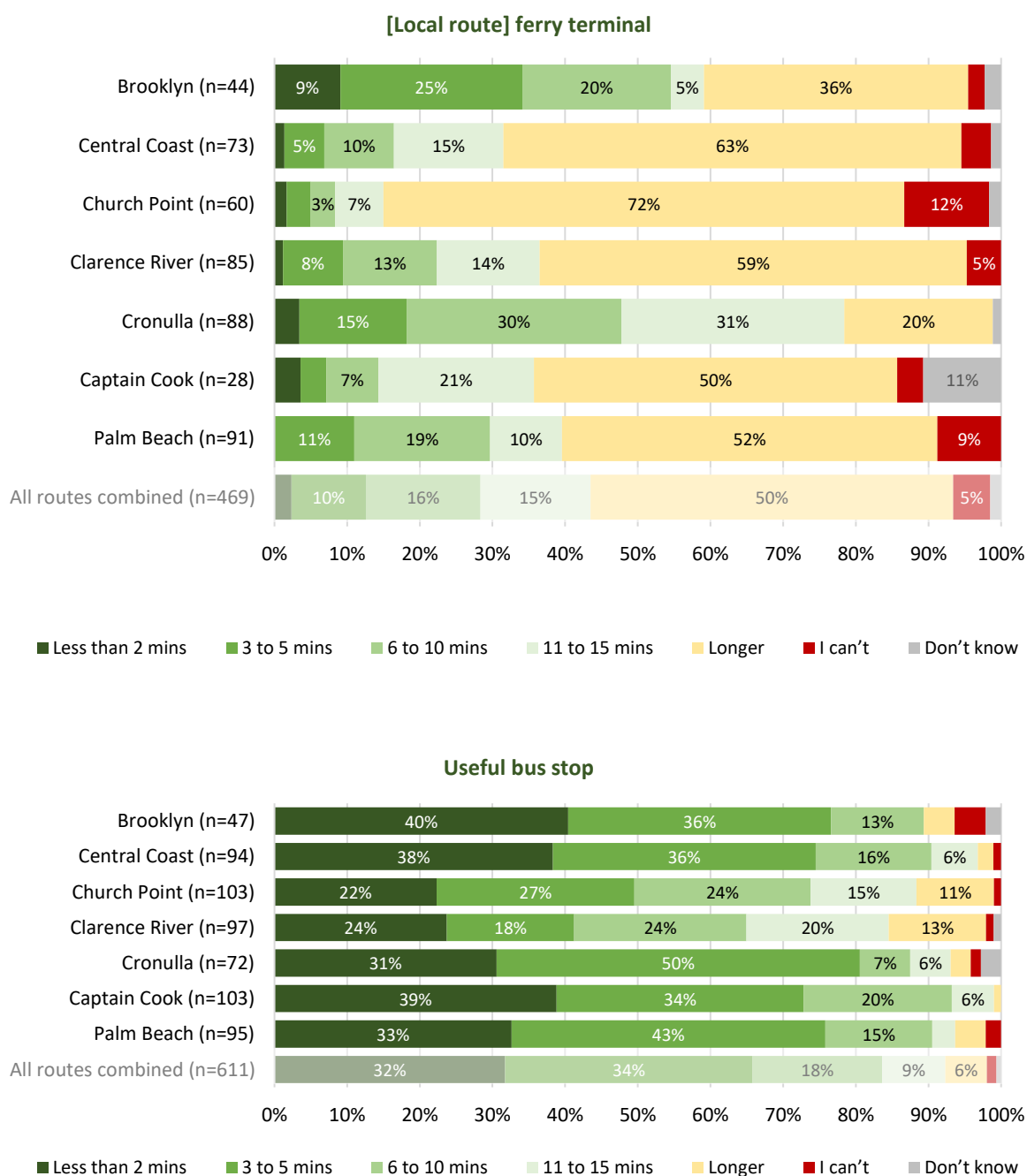
Access to Transport Services

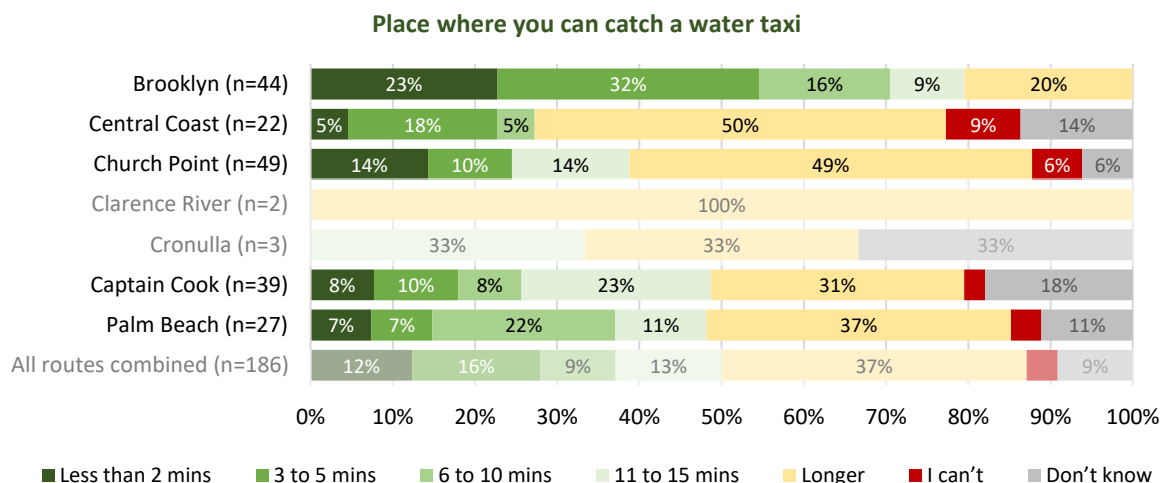
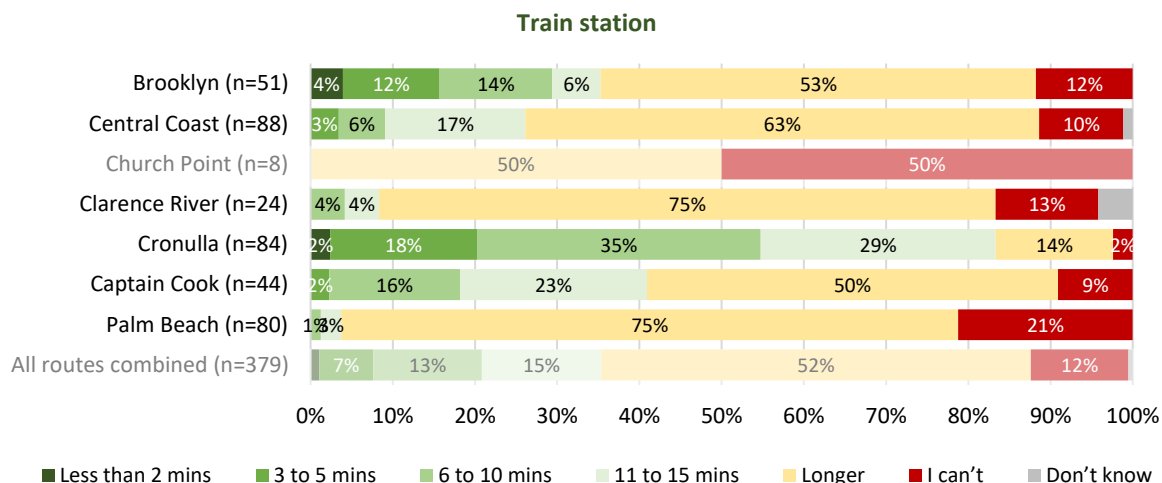
Generally, residents who are aware of them feel they have quicker walking access to bus services and water taxis (where available) than they do to the private ferry services.

However, the private ferry services were somewhat more accessible to them than train services.

Figure 6: How long would it take you to walk to your nearest... (Residents) ^{Q7}

Base: Respondents indicating they are **aware of each service**





Satisfaction with Transport Services

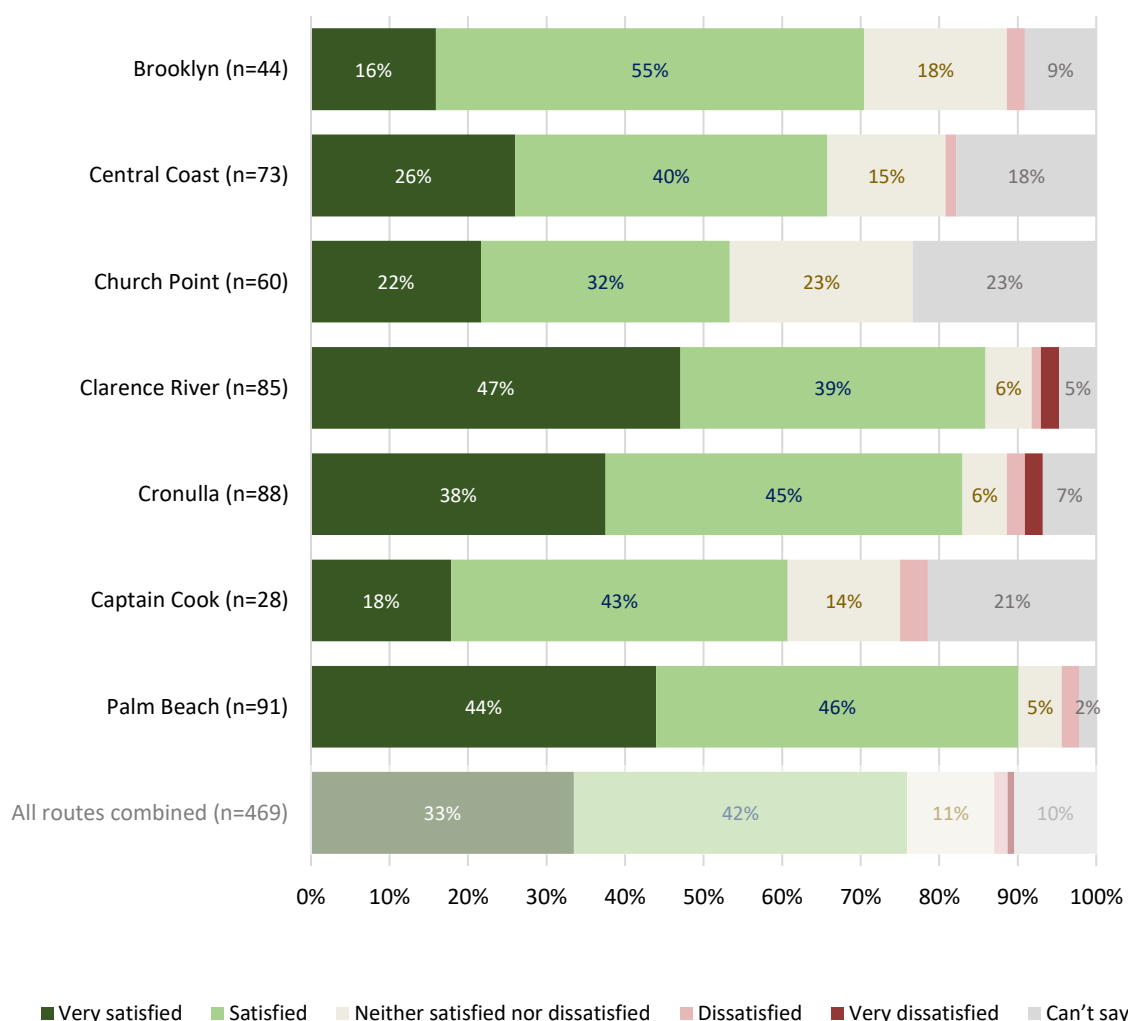
Residents who were aware of various transport options were asked about their satisfaction with what is available to them (even if they don't actually use it). Note that the base for this question is those who were aware, and sample sizes for each service and area are shown in the charts. Where sample sizes drop below n=20, results are greyed out and should be treated with particular caution.

Of those aware of the private ferry services, satisfaction was highest for Palm Beach, Clarence River and Cronulla. Satisfaction was over 50% for all routes, with only very small minorities (1%-4%) who were dissatisfied or very dissatisfied with the ferry service available to them.

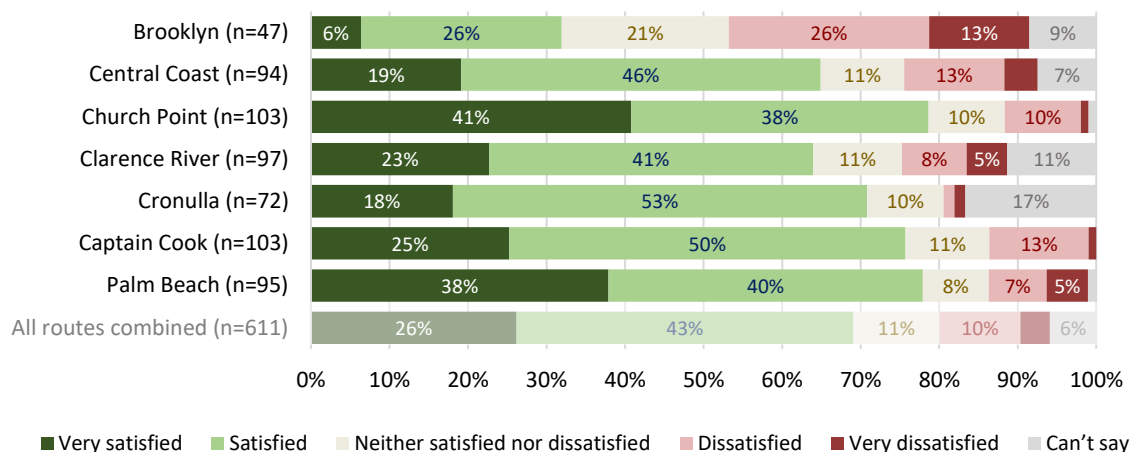
Figure 7: about when you need to travel to or from your local area, even if you don't use it, how satisfied are you with... (Residents) ^{Q6}

Base: Respondents indicating they are **aware of** each service

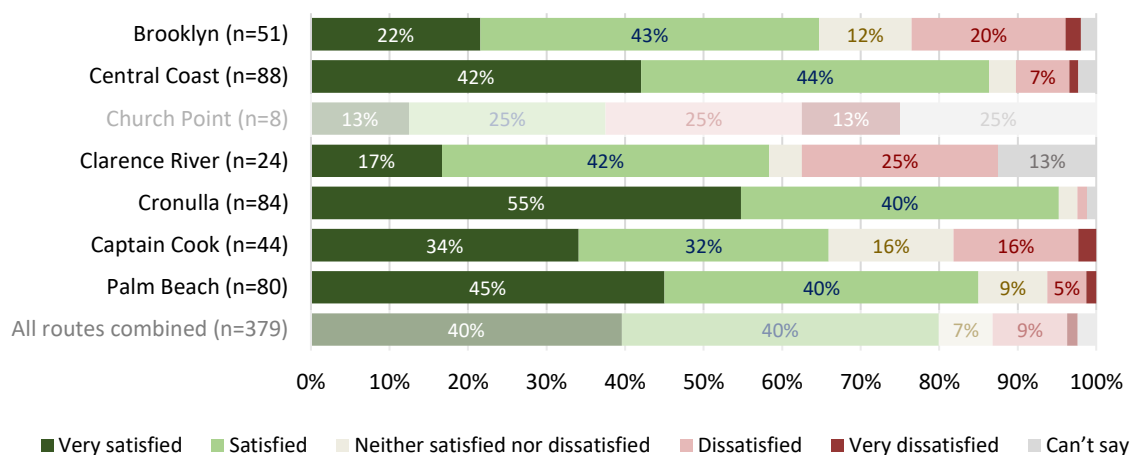
[Local route] ferry services available to you



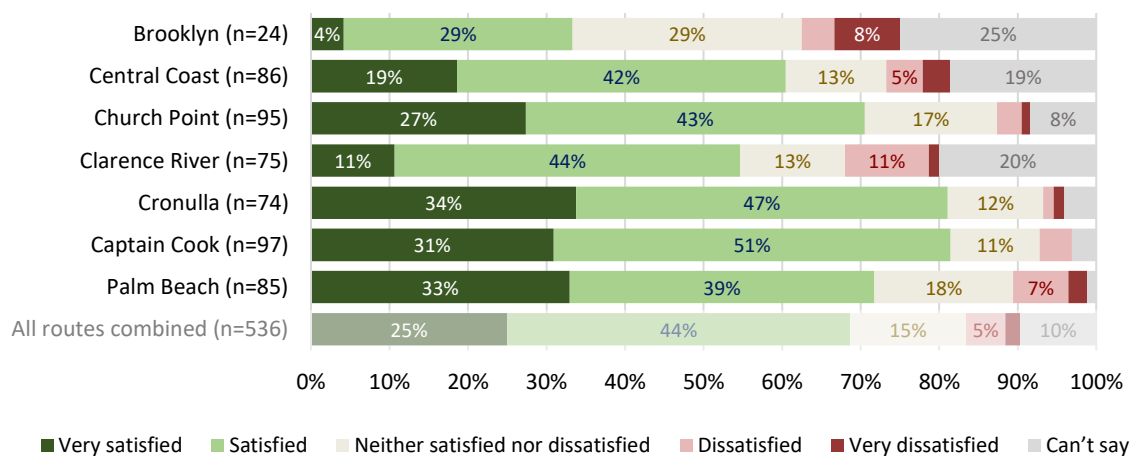
Bus services available to you



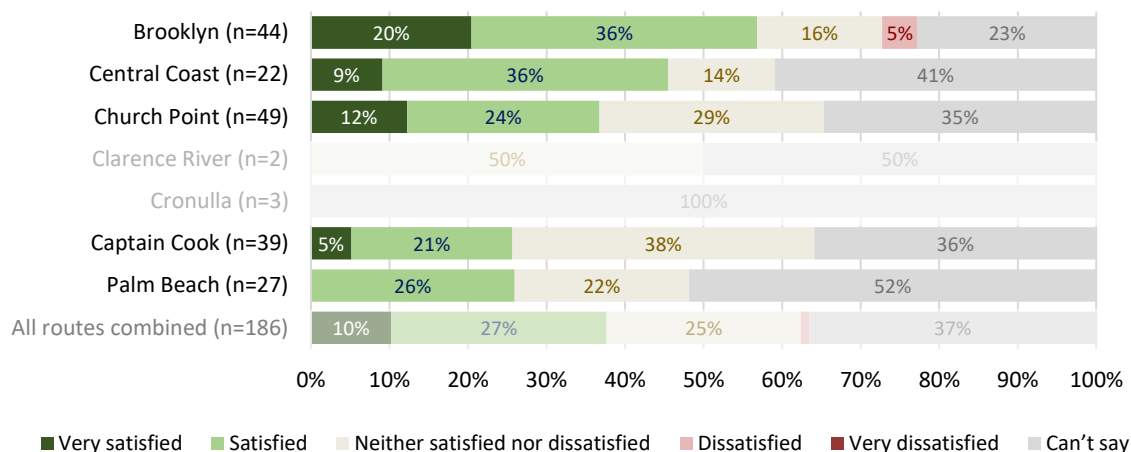
Train services available to you



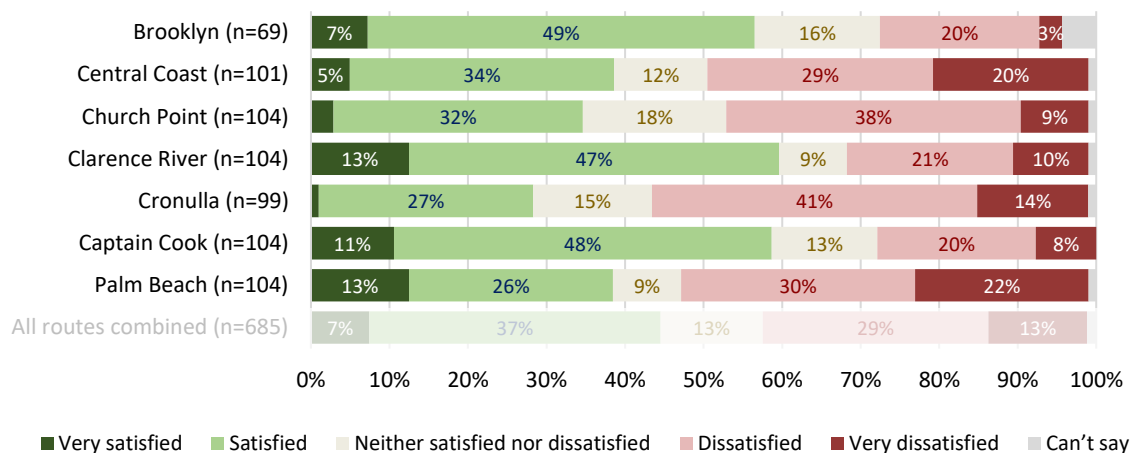
Taxis / Rideshare available to you



Water taxi services available to you



Typical road and traffic conditions getting to and from your local area



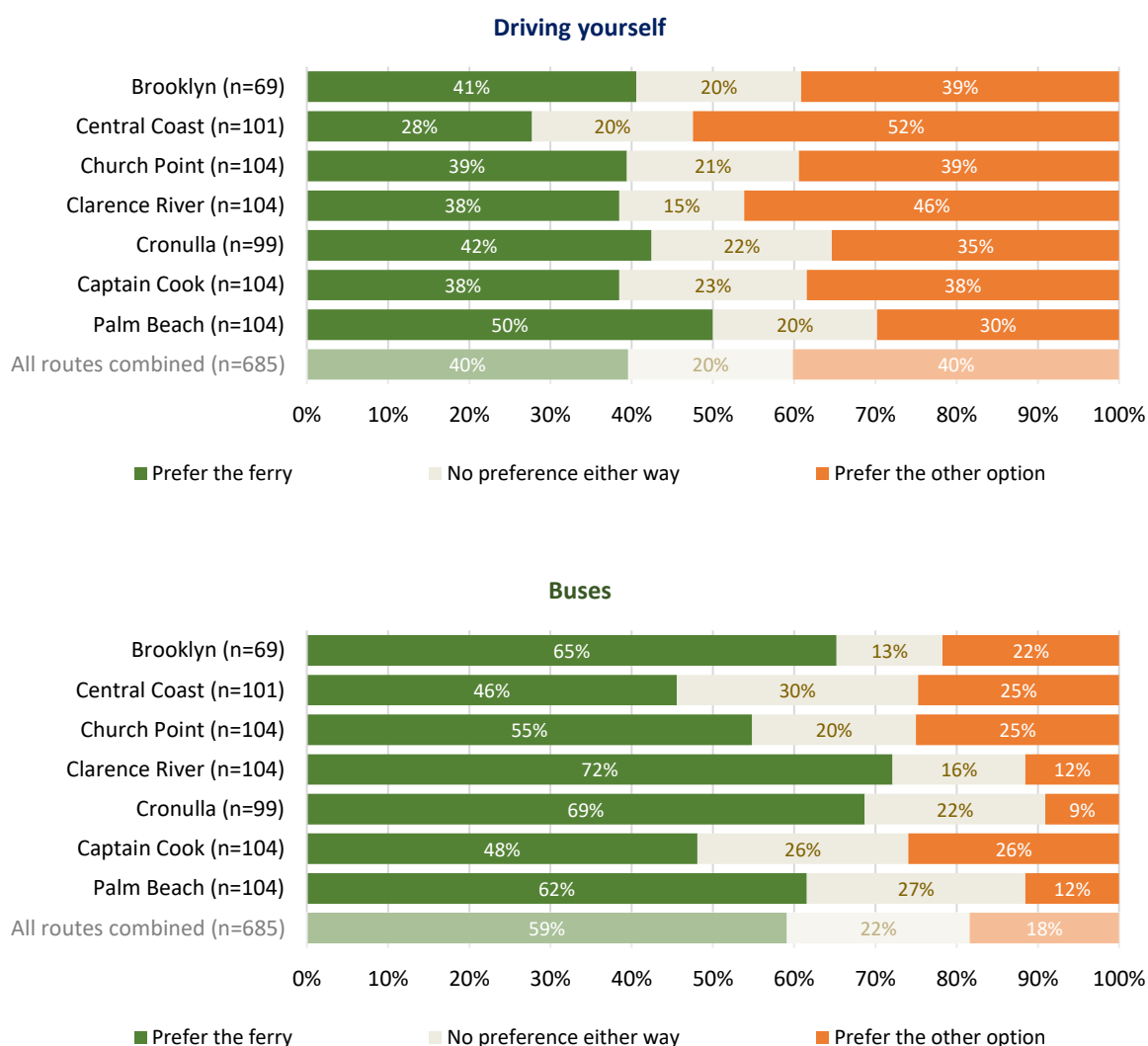
General Preference for Ferries

In general, compared to other possible forms of practical transport, ferries are widely liked by NSW residents. Across all routes, as many residents surveyed would prefer to use a ferry (40%) as drive themselves (40%). Though the exact split varied across the routes, the basic pattern was fairly consistent.

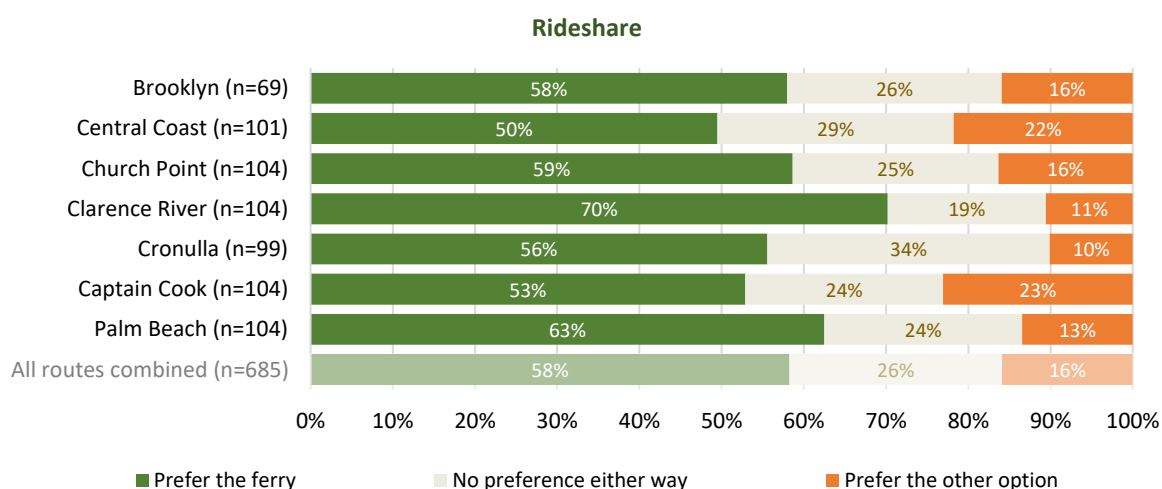
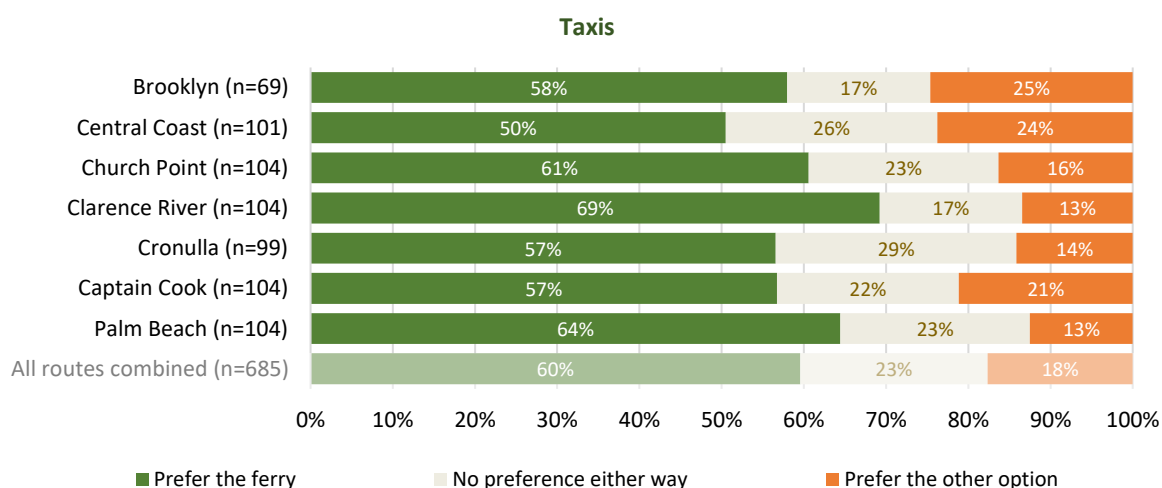
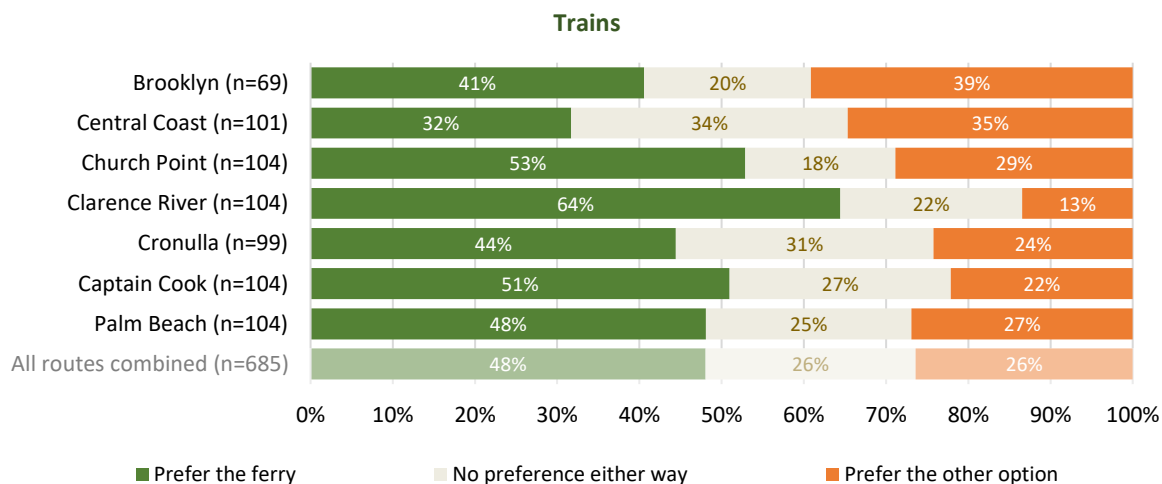
When looking at other forms of public transport or point-to-point transport, more residents tended to have a general preference for ferries than for the other options.

Unsurprisingly, when looking just at users of ferries, preferences for ferries were higher again (see page 45 in the user section for details).

Figure 8: Thinking about using ferries in general, if it was practical for your trip, compared to these other types of transport, would you prefer to use a ferry or prefer to use each other form of transport – or do you not have a preference either way? (Residents) ^{Q41}



Note that charts show general preferences for using ferries, not specifically for the purpose of travelling to and from their local area.



Perceptions of Ferry Services

While not all residents have experience of using the private ferry services, all residents can have an *expectation* of what the ferry service is likely to be like, and this will have practical meaning in terms of their likelihood to use the service at some stage. This approach allows the perception of cost, expressed here as ‘value for money’, to be considered in context alongside other relevant facets.

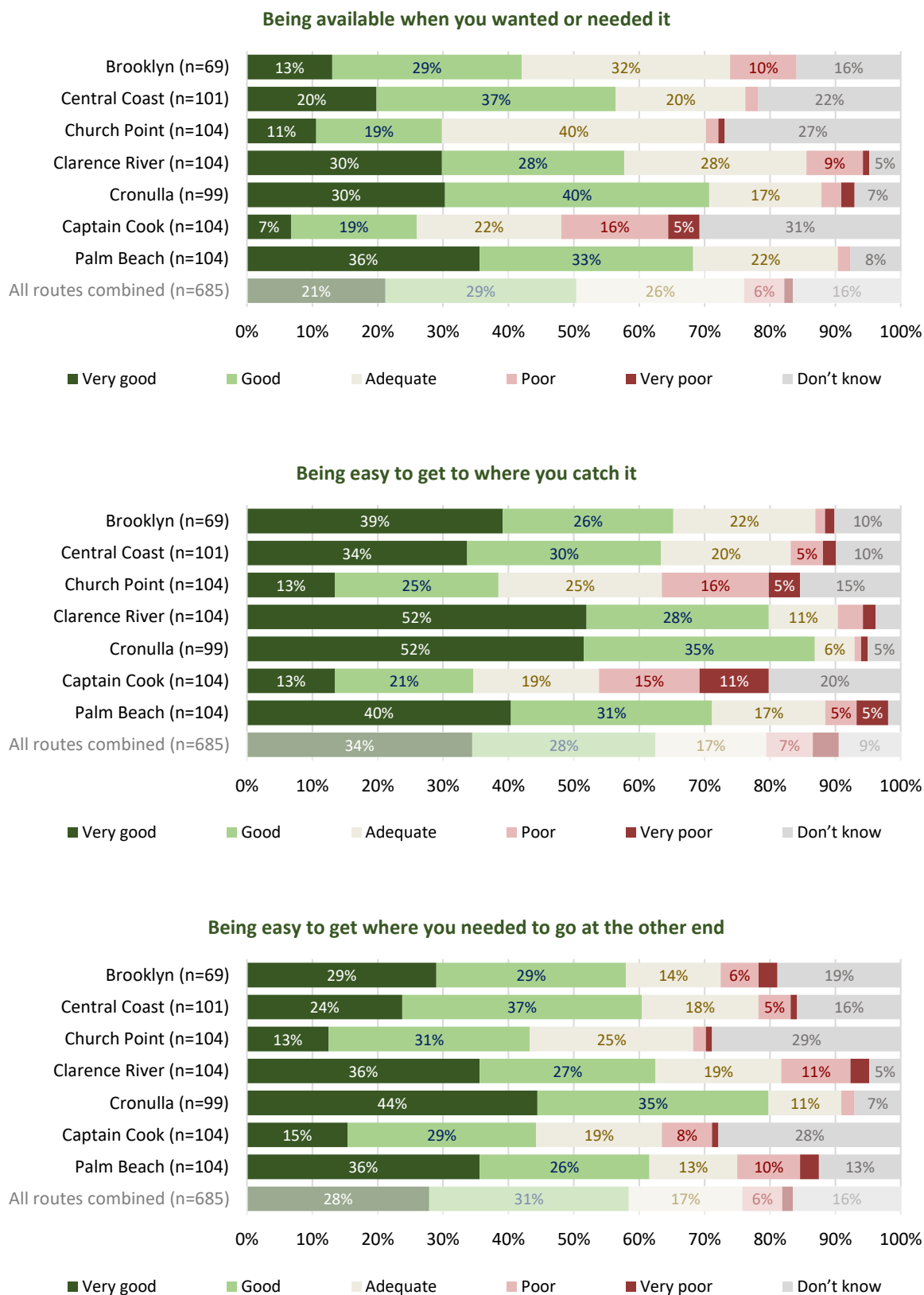
The table below summarises the proportion of residents who expect that each facet of the service would be *good* or *very good*. More detailed charts on the following pages show the full range of responses.

The tables and charts show that value and many aspects of convenience (accessibility, availability, time to destination) are the facets with relatively lower expectations from residents.

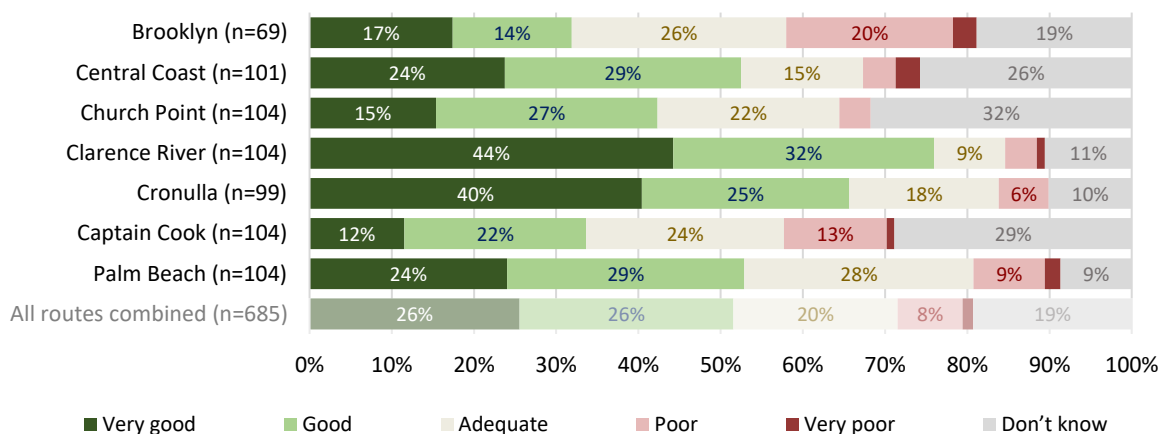
Table 7: Expectations of private ferry services. ^{Q36}

<i>Residents Expect to be “good + very good”</i>	Brooklyn	Central Coast	Church Point	Clarence River	Cronulla	Captain Cook	Palm Beach	All routes combined
<i>Sample size</i>	69	101	104	104	99	104	104	685
Being an enjoyable way to travel	87%	83%	78%	91%	91%	74%	94%	85%
Safety	68%	83%	68%	88%	92%	65%	87%	79%
How easy it is to get on and off the ferry	71%	72%	63%	85%	86%	57%	88%	75%
General cleanliness and condition of the ferry	71%	69%	59%	88%	79%	63%	85%	73%
Customer service	61%	69%	65%	88%	83%	54%	87%	73%
How long it would take to get to your destination	61%	61%	52%	74%	82%	41%	75%	64%
Hygiene during COVID	59%	59%	60%	79%	66%	52%	64%	63%
Being easy to get to where you catch it	65%	63%	38%	80%	87%	35%	71%	62%
Being easy to get where you needed to go at the other end	58%	60%	43%	63%	80%	44%	62%	58%
Value for money	32%	52%	42%	76%	66%	34%	53%	52%
Being available when you wanted or needed it	42%	56%	30%	58%	71%	26%	68%	50%

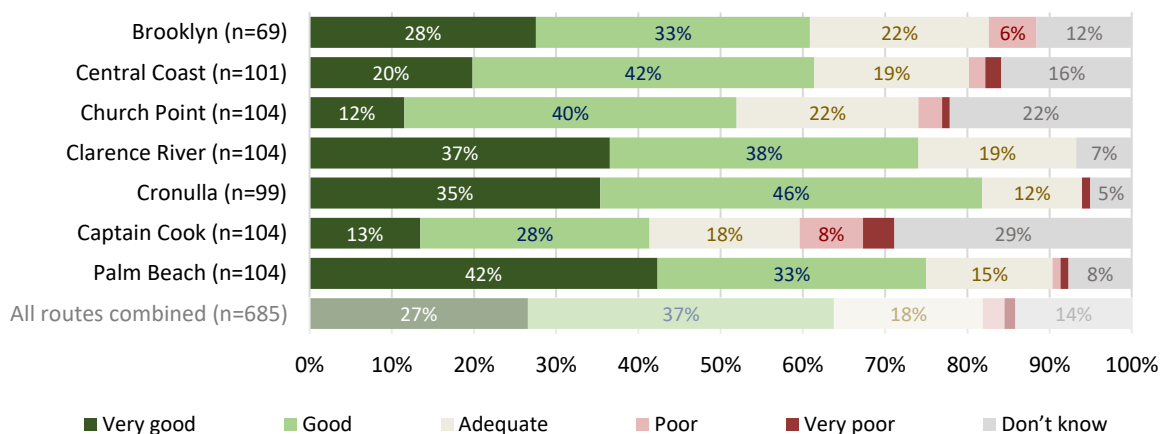
Figure 9: If you were to use the [local route] in the next week, how would you expect to find each of the following aspects? (Residents) ^{Q36}



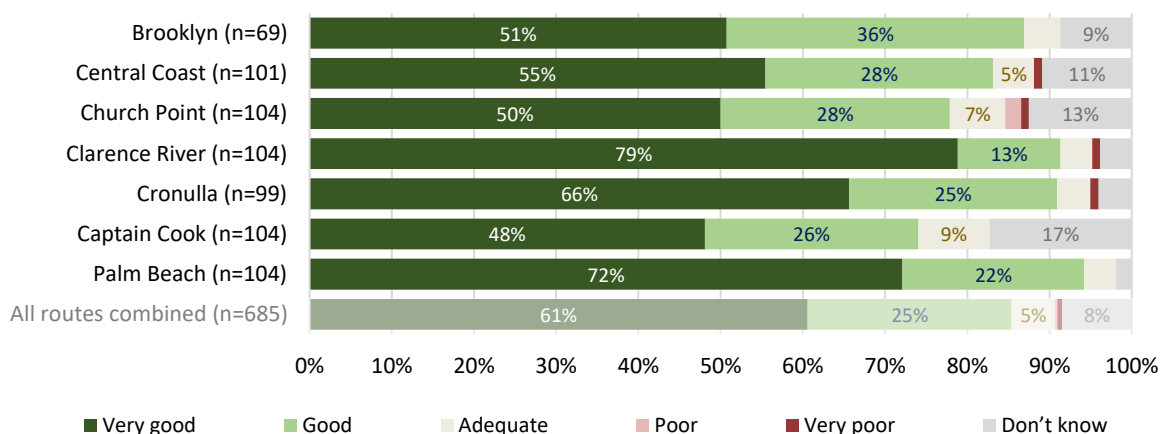
Value for money



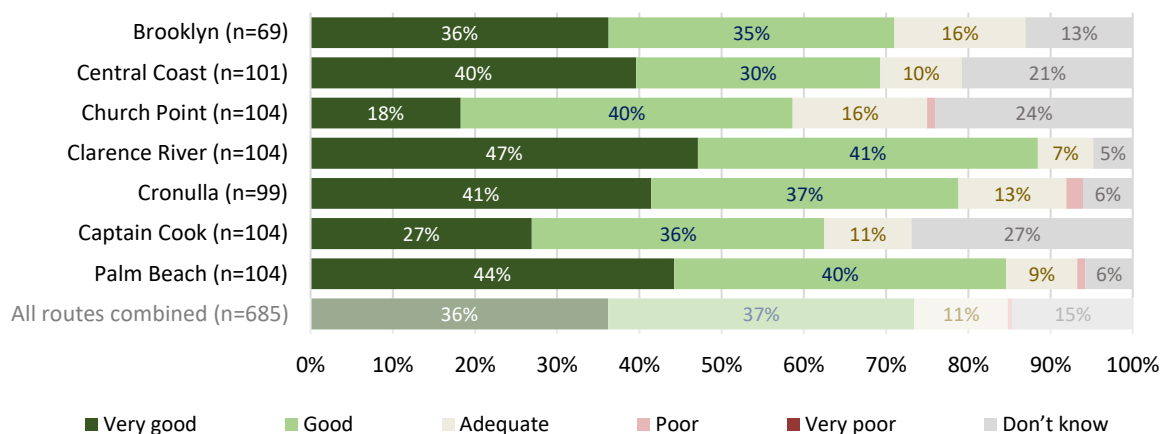
How long it would take to get to your destination



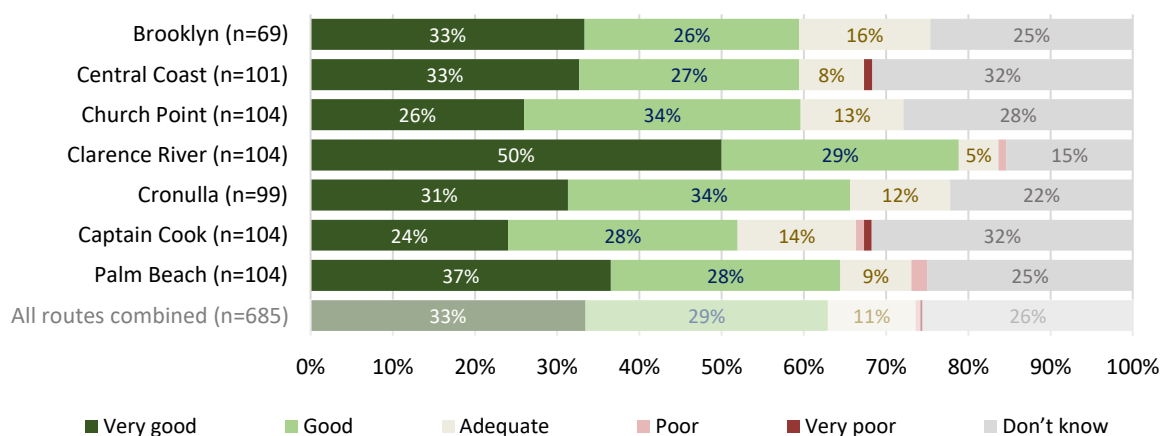
Being an enjoyable way to travel



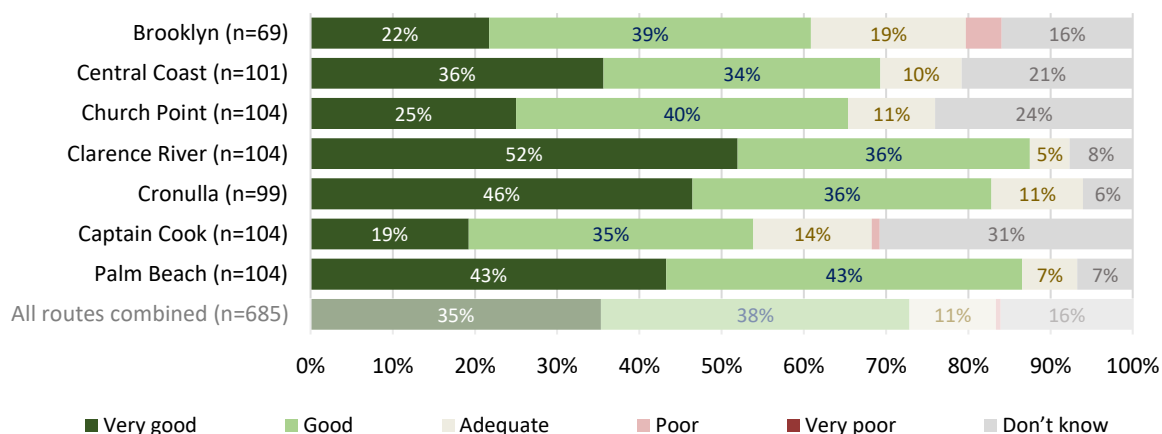
General cleanliness and condition of the ferry



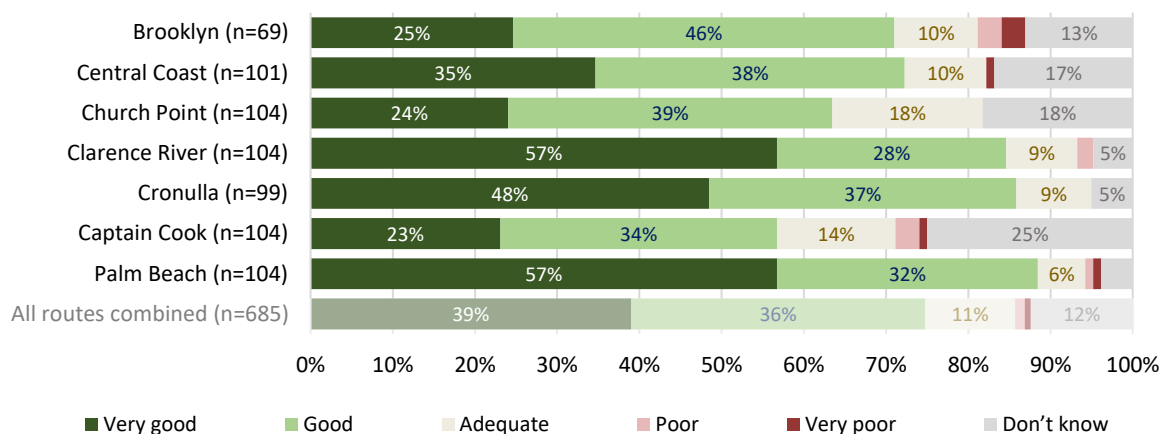
Hygiene during COVID



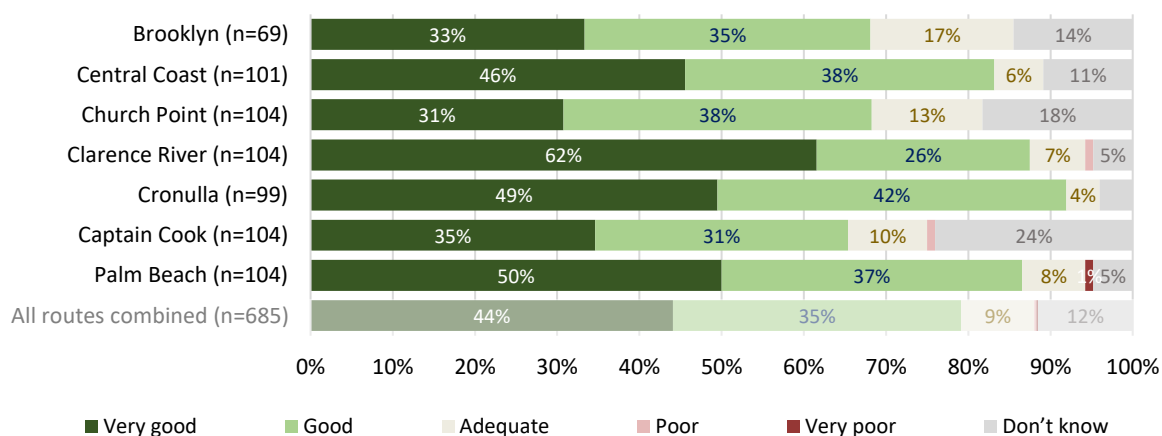
Customer service



How easy it is to get on and off the ferry



Safety



Expectations of Future Use and Factors Affecting Use

Between 66% and 84% of residents in the immediate catchment area of the ferry services expected that their usage would not change in the next 12 months.

For the Brooklyn, Central Coast and Church Point routes, if anything residents were slightly more likely to say they thought they would use the route less, but only by 1%-5%. For the Clarence River (+6%), Cronulla (+13%), Palm Beach (+13%) and Captain Cook Lane Cove route (+14%), more residents thought their usage may increase than decrease in the next 12 months.

Table 8: Expected use of route over next 12 months? ^{Q39}

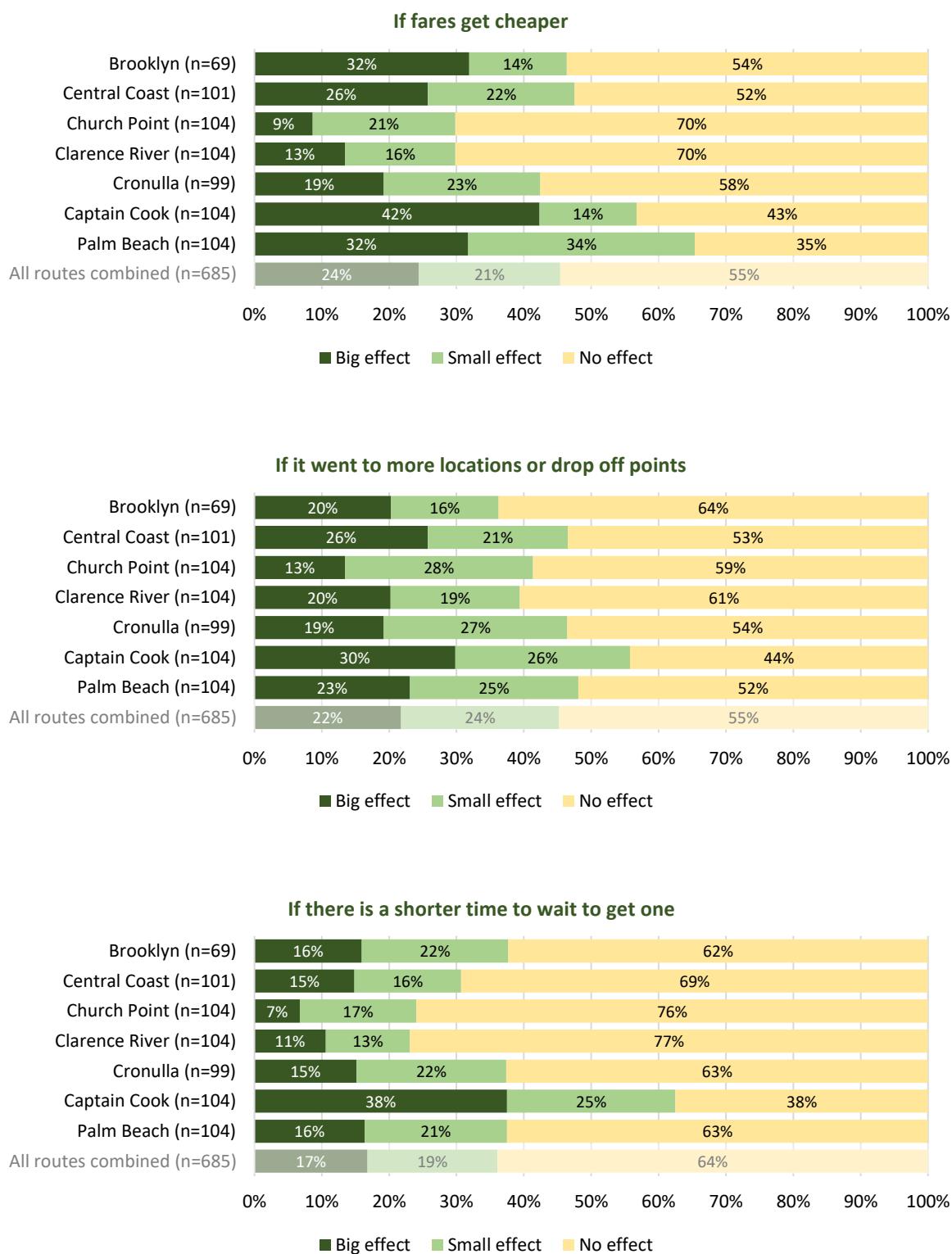
Residents <i>Only includes primary route</i>	Brooklyn	Central Coast	Church Point	Clarence River	Cronulla	Captain Cook	Palm Beach	All routes combined
<i>Sample size</i>	69	101	104	104	99	104	104	685
Much more	1%	6%	0%	5%	6%	6%	6%	4%
A little more	6%	7%	6%	9%	14%	18%	17%	11%
About the same	84%	73%	84%	80%	73%	66%	67%	75%
A little less	1%	3%	3%	3%	3%	4%	2%	3%
Much less	7%	11%	8%	4%	4%	6%	8%	7%
Total using more	7%	13%	6%	13%	20%	24%	23%	16%
Total using less	9%	14%	11%	7%	7%	10%	10%	9%

Residents nearby each ferry route were asked what effect certain changes might have on their use of the ferries.

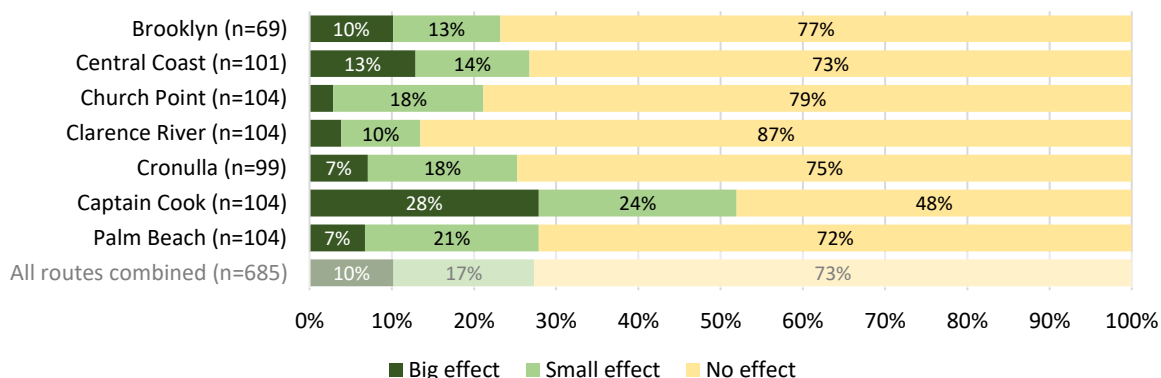
For all routes, the top three changes that residents thought might have at least a small effect on increasing their use would be more stops, cheaper fares, and shorter wait times. Shorter wait times were slightly more appealing than was a quicker time to reach the destination for all routes.

Table 9: Changes that would have at least a small effect in increasing ferry use ^{Q40}

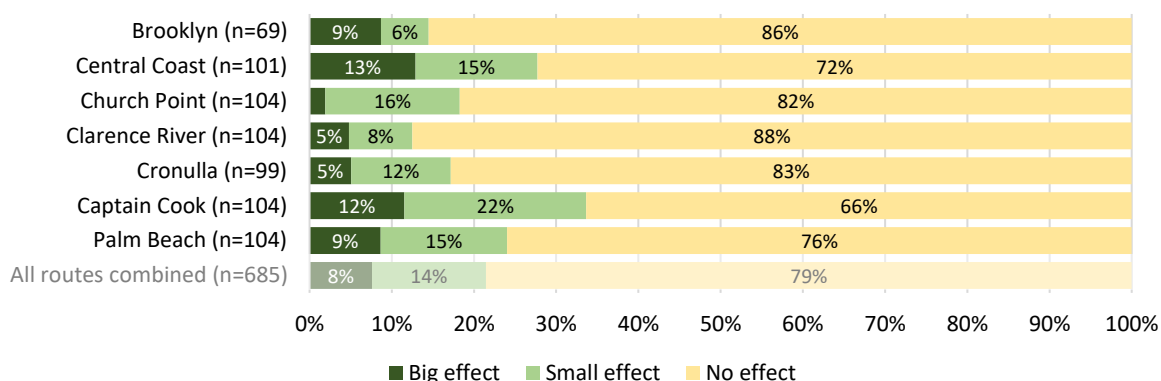
Residents	Brooklyn	Central Coast	Church Point	Clarence River	Cronulla	Captain Cook	Palm Beach	All routes combined
<i>Sample size</i>	69	101	104	104	99	104	104	685
Cheaper fares	44%	48%	30%	29%	42%	56%	66%	45%
More stops	36%	47%	41%	39%	46%	56%	48%	46%
Shorter wait times	38%	31%	24%	23%	37%	62%	37%	36%
Quicker to destination	23%	27%	21%	13%	25%	52%	28%	27%
Customer service	14%	28%	18%	12%	17%	34%	24%	21%
Hygiene / cleanliness	16%	29%	17%	8%	23%	34%	21%	21%
Easier to get on / off	26%	25%	12%	11%	17%	36%	27%	22%

Figure 10: Effect of various changes on likelihood of using [route] ferry (Residents) ^{Q40}

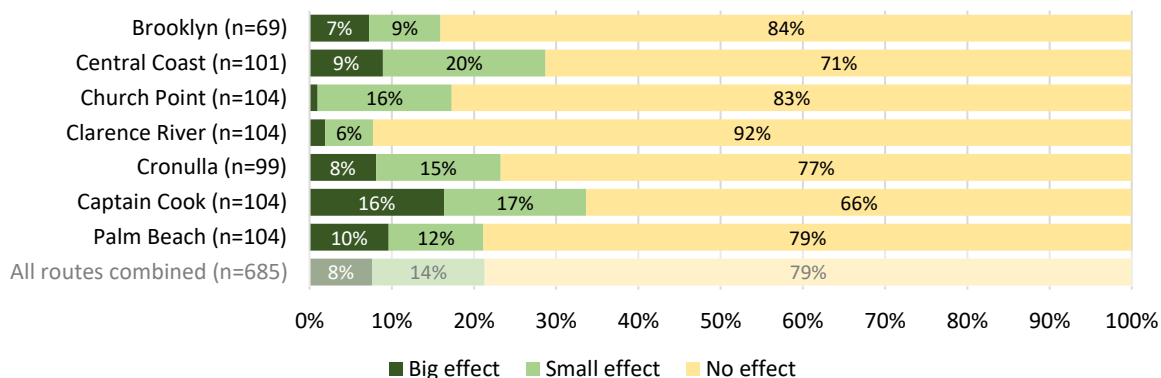
If they took less time to get to the destination



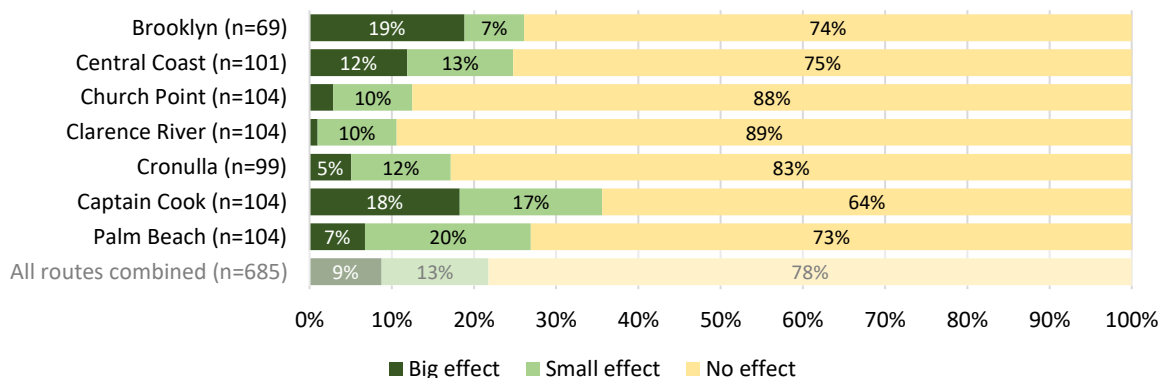
If customer service quality improves



If hygiene or cleanliness was improved



Making the ferries easier to get on and off



B. Ferry User Survey Results

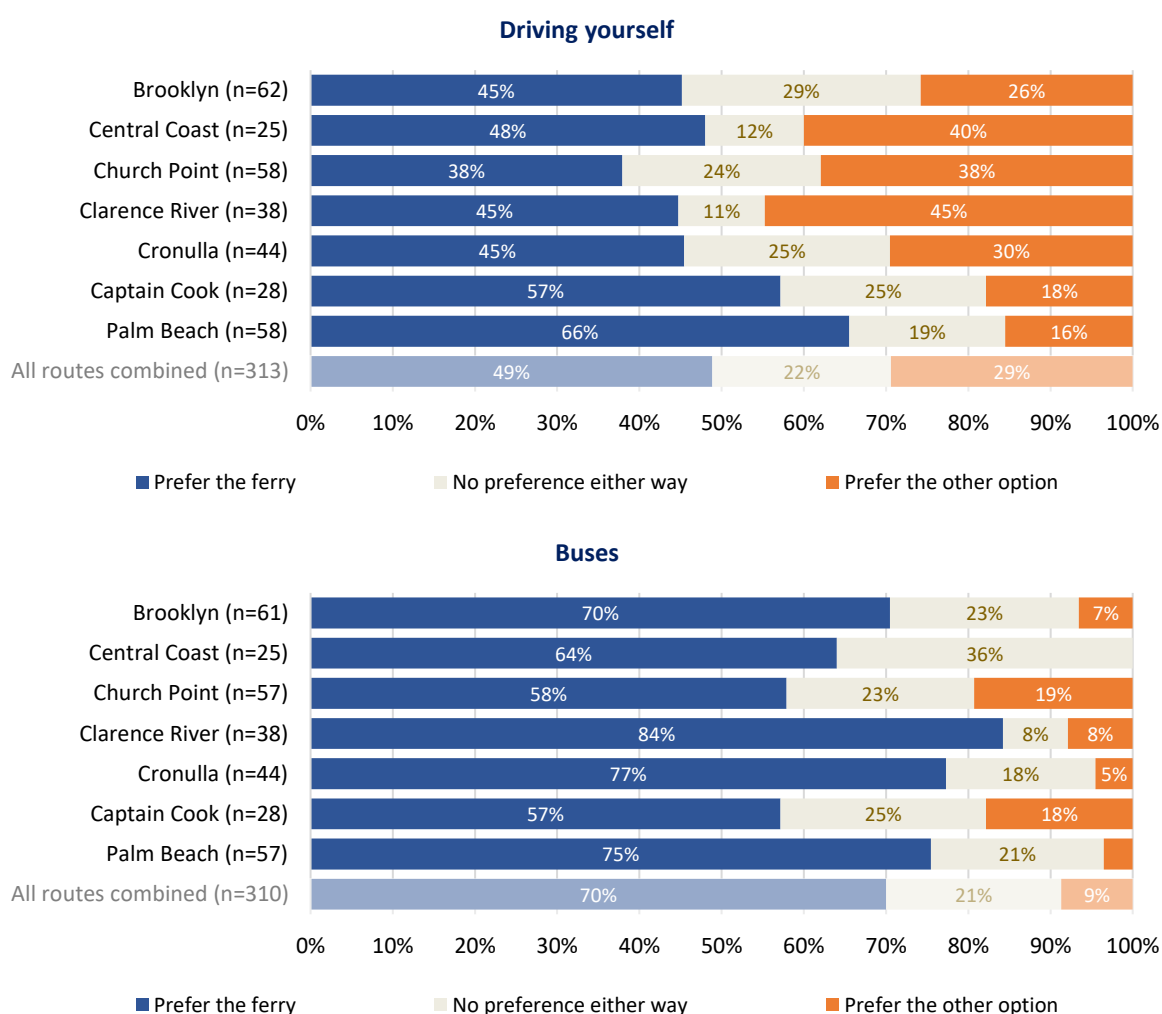
This section of the report is based on results from all people in the survey who had used each route. This included residents who had used the ferry they were allocated to based on proximity, residents in the Central Coast area who were allocated by proximity to one ferry but who had only used one of the others, and passengers on board some routes. In all cases, respondents were asked to provide details of their most recent (or current) trip. The results presented here are based on the aggregate samples of users for each route. Sample sizes are as shown. Note that sample sizes reflect the number of trips reported, and in the on-board user survey it was possible for the same user to provide feedback on multiple trips.

* Care should be taken when interpreting small sample sizes (especially under n=20).

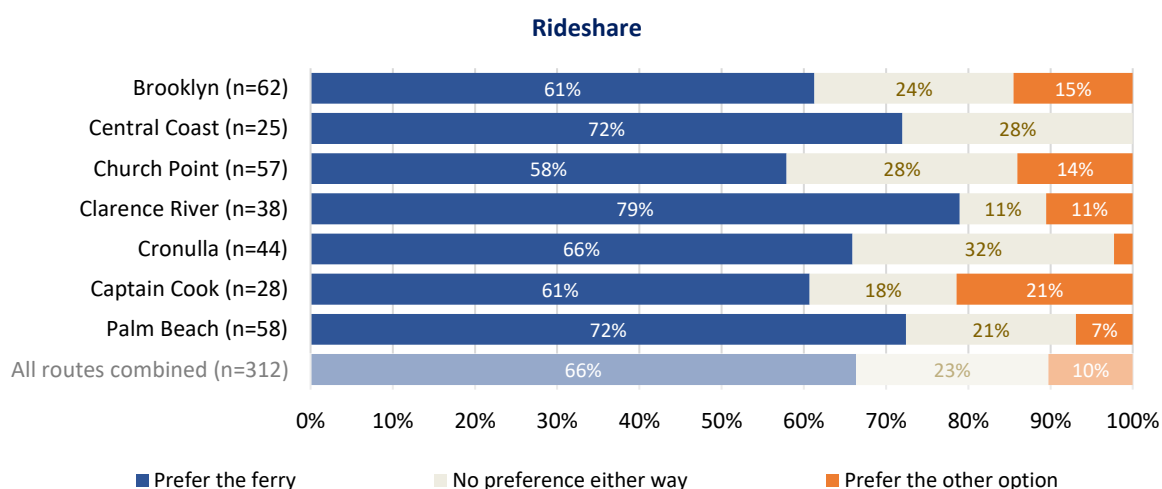
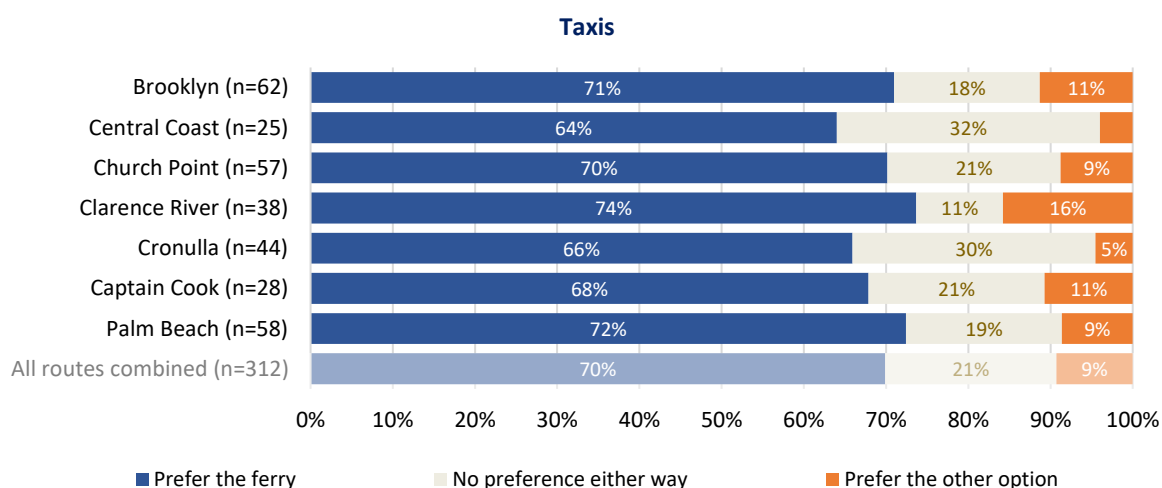
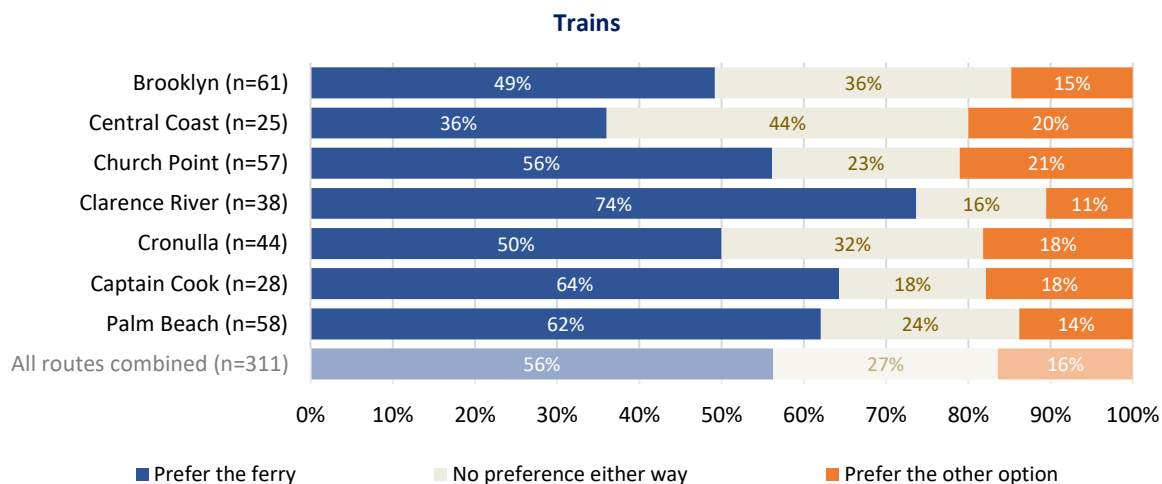
General Preferences for Using Ferries

The resident survey showed people in NSW generally find ferries an appealing form of transport to use where they are a practical option. Unsurprisingly, general preferences for using ferries is higher again amongst users (noting that this is not necessarily about use in their local area, but generally).

Figure 11: Thinking about using ferries in general, if it was practical for your trip, compared to these other types of transport, would you prefer to use a ferry or prefer to use each other form of transport – or do you not have a preference either way? (Users) Q41 (Q34 User Survey)



Note that charts show general preferences for using ferries, not specifically for the purpose of travelling to and from their local area.

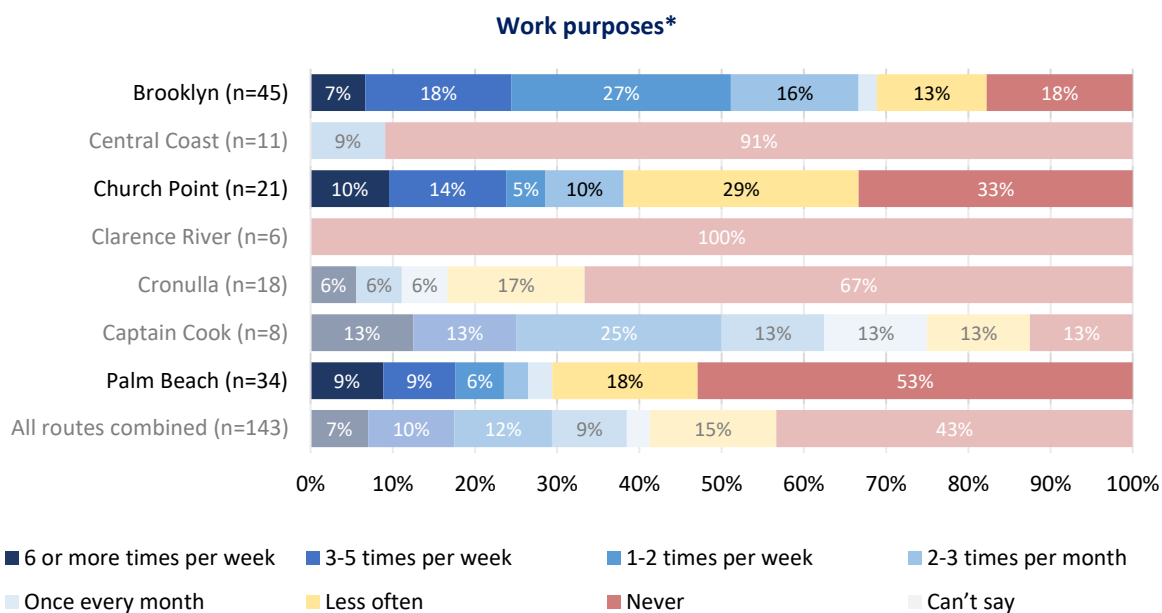


Reasons for Using Local Ferries

Users were asked how often they used the private ferry routes for various purposes.

Only people who said they were working were asked how often they use the ferry for work purposes. This shows that Brooklyn, Church Point, and Captain Cook's Lane Cove route were the most likely to be used for work travel.

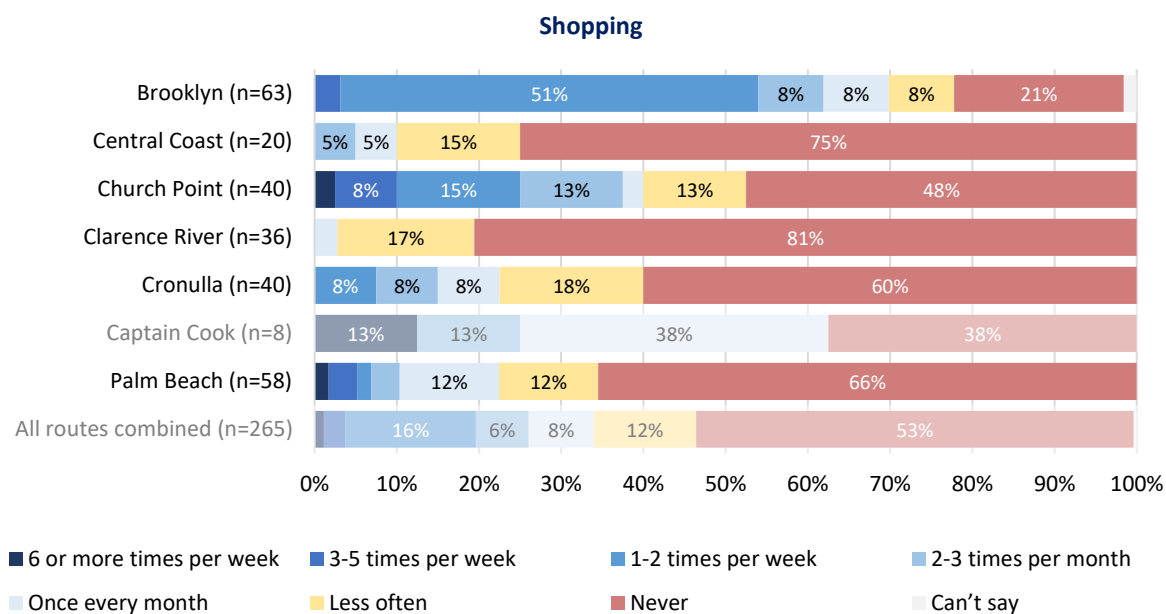
Figure 12: Use of transport services—for particular purposes ^{Q13}



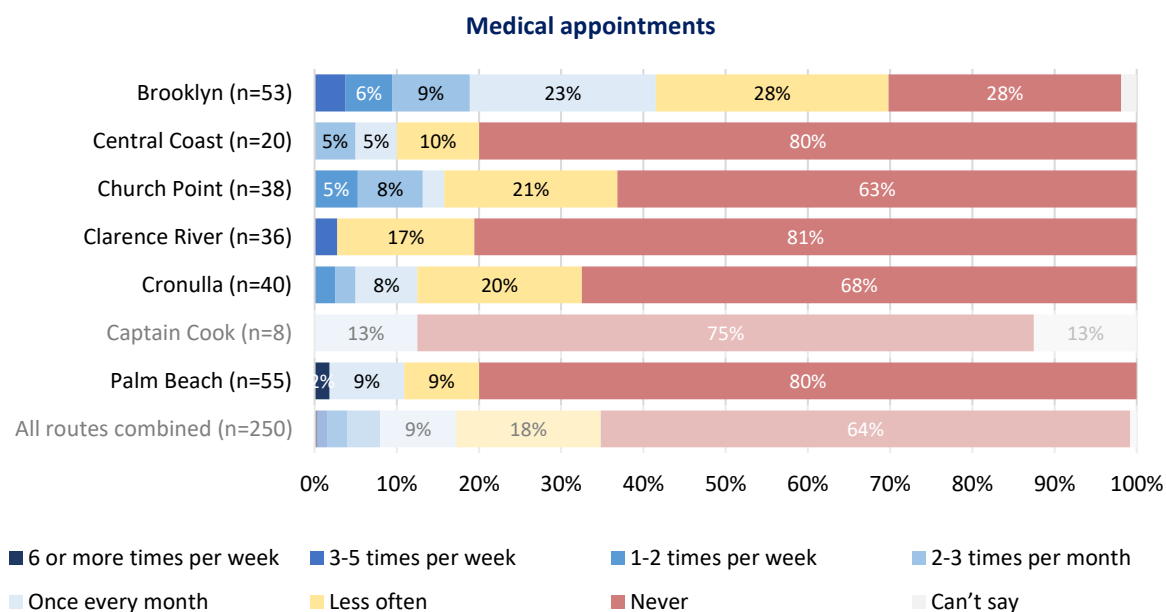
** Only employed respondents were asked this question.*

Only nine people in the survey indicated they were studying, too few to report numerically on their use of routes for study purposes. Six of the nine were located in the Church Point route location, and of these three of them indicated they use the ferry at least weekly for getting to and from study.

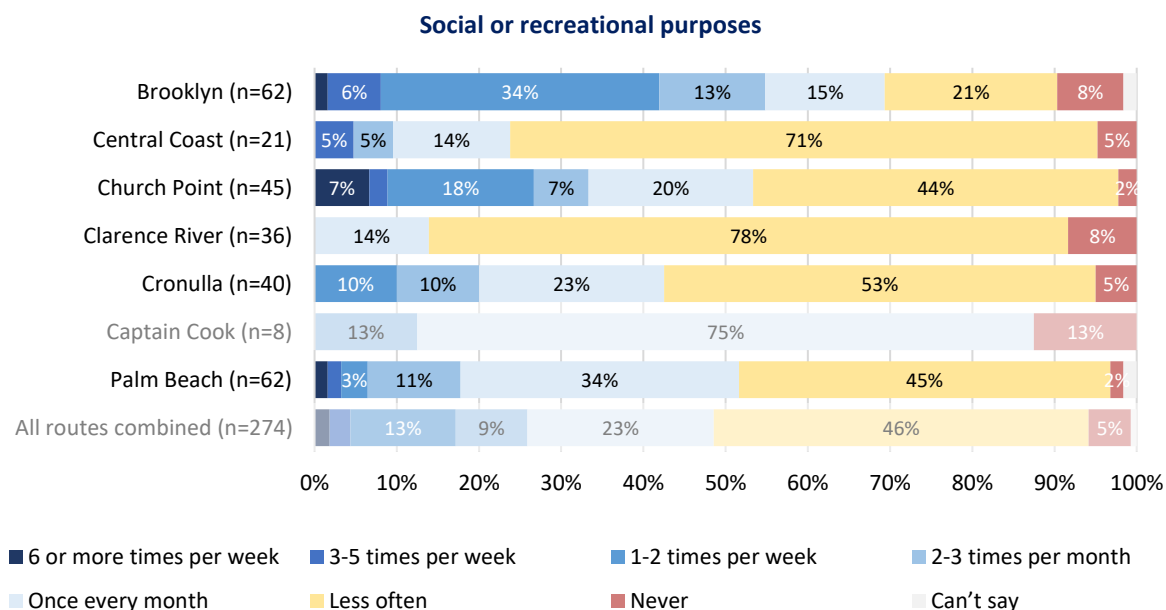
The same routes most used for work purposes were also more commonly used for shopping trips.



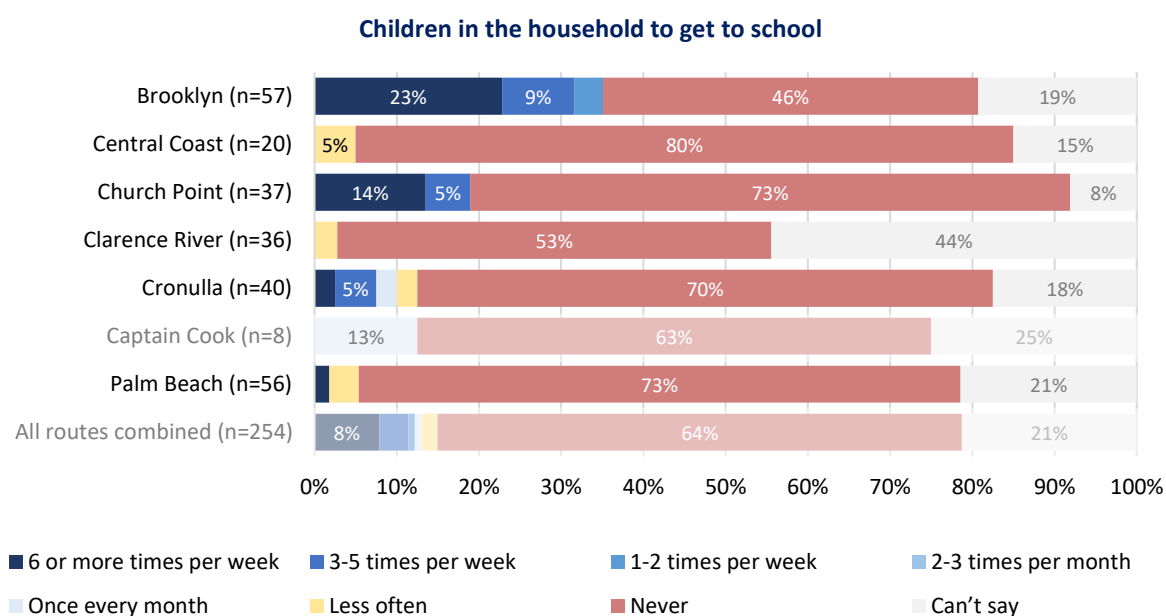
Medical appointments were an uncommon use of all routes, but most often the case for users of Brooklyn.



All routes are at least occasionally used for social and recreational activities by almost all users. This appears to be the most widespread but relatively low frequency purpose for using all routes.



Only Brooklyn, Church Point and Cronulla had users reporting regular usage of the ferry routes as a method of children travelling to school.



In general, users of the private ferries mostly considered they were equally easy to use at all times of the year, and where this wasn't the case, more tended to think they were easier to use in summer / warmer months.

Table 10: Do you feel it is easier to use the [route] ferry at some times of the year? Q37 (Q31 User Survey)

<i>Users</i>	Brooklyn	Central Coast	Church Point	Clarence River	Cronulla	Captain Cook	Palm Beach	All routes combined
<i>Sample size</i>	63	21	29	38	44	8*	58	261
No – equally easy to use throughout the year	62%	62%	69%	68%	48%	75%	55%	60%
Yes – easier to use during summer / warmer months	11%	29%	21%	21%	27%	25%	17%	20%
Yes – easier to use during winter / cooler months	13%	5%	10%	8%	18%	0%	17%	13%
Yes – easier to use at other times of the year	14%	5%	0%	3%	7%	0%	10%	8%

Non-users of the ferries were similar. If anything, non-users were somewhat more likely to feel ferries were easier to use in summer / warmer months (across all routes 32% felt this, compared to 20% of users), and less likely to feel they were easier to use in winter / colder months (7% compared to 13%).

Last Trip: Purpose

Social and recreational trips were the most commonly observed last trip purpose amongst all users and local residents who used the private ferry services for all routes except the Captain Cook Cruises Lane Cove route. Of the small number of users of this route in the survey (just n=8), the route was most commonly used to get to or from work. Of the others, the Brooklyn route had the highest use for work purposes.

Table 11: Main reason for trip Q23 (Q17 User Survey)

<i>All Users</i> <i>Includes any whose used route</i>	Brooklyn	Central Coast	Church Point	Clarence River	Cronulla	Captain Cook	Palm Beach	All routes combined
<i>Sample size</i>	71	21	46	36	40	8*	67	289
Getting to or from work	27%	0%	9%	0%	5%	63%	10%	13%
Getting to or from study	0%	0%	9%	0%	0%	13%	4%	3%
Medical appointment	14%	0%	4%	6%	3%	13%	0%	6%
Shopping trip	14%	0%	7%	8%	5%	0%	3%	7%
Social/recreation activity	31%	86%	70%	86%	83%	0%	78%	65%
<i>Other</i>	14%	10%	2%	0%	5%	0%	4%	6%
<i>Can't recall</i>	0%	5%	0%	0%	0%	13%	0%	1%

Table 12: Main reason for trip Q23

<i>Residents</i> <i>Only includes primary route</i>	Brooklyn	Central Coast	Church Point	Clarence River	Cronulla	Captain Cook	Palm Beach	All routes combined
<i>Sample size</i>	27	19*	12*	36	40	8*	46	188
Getting to or from work	22%	0%	0%	0%	5%	63%	2%	7%
Getting to or from study	0%	0%	0%	0%	0%	13%	0%	1%
Medical appointment	11%	0%	0%	6%	3%	13%	0%	4%
Shopping trip	15%	0%	8%	8%	5%	0%	2%	6%
Social/recreation activity	44%	84%	92%	86%	83%	0%	91%	77%
<i>Other</i>	7%	11%	0%	0%	5%	0%	4%	4%
<i>Can't recall</i>	0%	5%	0%	0%	0%	13%	0%	1%

Across all routes, 85% of all users reported their last trip involved using the ferry 'both ways'. Other than the very small sample of eight users of the Captain Cook Lane Cove route, between 79% and 95% of users reported catching the ferry both ways.

For the Brooklyn ferry, for three-quarters of the last trips reported the user said that they needed to go to their specific destination, and the ferry route did not impact their choice at all. A similar proportion of the small number of users of the Captain Cook Lane Cove route also said this, and 58% of those using the Clarence River ferry.

For the other routes, for more than half of the last trips reported the user chose their specific destination at least in part because of the ferry route.

Table 13: To what extent did you choose your specific destination because the ferry went there? Q30 (Q24 User Survey)

<i>Users</i>	Brooklyn	Central Coast	Church Point	Clarence River	Cronulla	Captain Cook	Palm Beach	All routes combined
<i>Sample size</i>	70	20	45	36	40	8*	64	283
Not at all – I needed to go to that specific place	73%	35%	42%	58%	45%	75%	33%	51%
Somewhat – I chose to go there partly because the ferry went there	6%	30%	27%	3%	18%	13%	13%	14%
Completely – I went there because the ferry went there	19%	30%	24%	22%	35%	13%	33%	26%
Going on the ferry was actually the main purpose	3%	5%	7%	17%	3%	0%	22%	10%

Last Trip: Time and Day

Two thirds of reported last trips on the Brooklyn, Cronulla and Palm Beach routes were on weekdays, with between 44% and 59% reported on the other routes. For all routes, allowing for those who couldn't recall the day of their last trip, more users reported weekday use than weekend use.

Table 14: Day of most recent trip ^{Q15 (Q9 User Survey)}

<i>Users</i>	Brooklyn	Central Coast	Church Point	Clarence River	Cronulla	Captain Cook	Palm Beach	All routes combined
<i>Sample size</i>	72	22	46	36	40	8*	70	294
Monday to Thursday	65%	41%	48%	36%	45%	38%	56%	51%
Friday	4%	9%	11%	8%	20%	13%	9%	10%
Weekday	69%	50%	59%	44%	65%	51%	65%	61%
Saturday	21%	27%	22%	19%	20%	13%	19%	20%
Sunday	1%	18%	15%	22%	10%	13%	11%	11%
Weekend	22%	45%	37%	41%	30%	26%	30%	31%
<i>Can't recall</i>	8%	5%	4%	14%	5%	25%	6%	7%

For all routes other than Brooklyn, the majority of last reported trips were in the mornings. Brooklyn users' last trips were more likely to be in the afternoon or early evening.

Table 15: Time of day of most recent trip ^{Q16 (Q10 User Survey)}

<i>Users</i>	Brooklyn	Central Coast	Church Point	Clarence River	Cronulla	Captain Cook	Palm Beach	All routes combined
<i>Sample size</i>	72	22	46	36	40	8*	70	294
Before 9am	11%	9%	11%	11%	8%	50%	4%	10%
9am-12pm	22%	73%	63%	78%	75%	13%	66%	56%
12pm-4pm	38%	9%	11%	3%	10%	13%	20%	18%
4pm-7pm	25%	5%	11%	0%	8%	13%	7%	11%
After 7pm	1%	0%	0%	0%	0%	0%	1%	1%
<i>Can't recall</i>	3%	5%	4%	8%	0%	13%	1%	3%

Getting To and From the Ferry

Most users came direct from their home prior to catching their most recent trip on a ferry.

Other than the Church Point and Captain Cook Lane Cove routes, where most users reported taking 11+ minutes to get to the ferry, a majority of users of the other routes reported a 3-10 minute travel time to get to their ferry the last time they caught it.

By far the most common ways of getting to the ferry was on foot, or by driving and parking a car or motorcycle.

Table 16: Where did you come from when you caught the ferry? Q17 (Q11 User Survey)

<i>All Users</i> <i>Includes any whose used route</i>	Brooklyn	Central Coast	Church Point	Clarence River	Cronulla	Captain Cook	Palm Beach	All routes combined
<i>Sample size</i>	71	21	46	36	40	8*	69	291
Home	59%	67%	70%	92%	80%	75%	75%	73%
Work	18%	5%	2%	0%	3%	0%	9%	8%
Place of study	1%	0%	4%	0%	0%	13%	1%	2%
Shopping	3%	5%	7%	0%	3%	0%	0%	2%
Medical appointment	7%	0%	4%	0%	0%	0%	0%	2%
Social/recreation activity	8%	24%	13%	8%	15%	0%	14%	12%
Something else	3%	0%	0%	0%	0%	0%	0%	1%
Can't recall	0%	0%	0%	0%	0%	13%	0%	0%

Table 17: Time taken to get to ferry Q19 (Q13 User Survey)

<i>Users</i>	Brooklyn	Central Coast	Church Point	Clarence River	Cronulla	Captain Cook	Palm Beach	All routes combined
<i>Sample size</i>	72	21	46	36	40	8*	69	292
Less than 2 minutes	13%	0%	11%	11%	3%	0%	1%	7%
3-5 minutes	28%	43%	15%	36%	28%	25%	30%	28%
6-10 minutes	32%	38%	13%	39%	38%	0%	36%	31%
11-15 minutes	6%	5%	43%	3%	15%	50%	14%	16%
Longer	21%	14%	17%	11%	18%	25%	17%	17%
Can't recall	1%	0%	0%	0%	0%	0%	0%	0%

Table 18: How did you get to the ferry? (Multiple response) Q18 (Q12 User Survey)

<i>Users</i>	Brooklyn	Central Coast	Church Point	Clarence River	Cronulla	Captain Cook	Palm Beach	All routes combined
<i>Sample size</i>	71	15*	25	33	26	2*	53	225
Walked	56%	33%	26%	25%	78%	63%	39%	45%
Cycled	0%	5%	0%	3%	3%	0%	1%	1%
Drove and parked a car or motorcycle	42%	52%	54%	53%	18%	13%	43%	42%
Got dropped off	0%	10%	4%	17%	5%	13%	10%	7%
Taxi / Rideshare	0%	0%	0%	0%	0%	0%	0%	0%
Bus	0%	0%	17%	3%	3%	13%	6%	5%
Train	4%	0%	0%	0%	5%	0%	0%	2%
Water taxi	1%	0%	0%	0%	0%	0%	0%	0%
Private boat	1%	0%	2%	0%	0%	0%	0%	1%
Some other way	1%	0%	0%	0%	0%	0%	1%	1%
Can't recall	0%	0%	0%	0%	0%	0%	0%	0%

There was somewhat more variation in terms of where people went to after their most recent ferry trip. The most common destination was a social or recreational activity for most route users. The higher proportion of Brooklyn users who reported going home may reflect the higher proportion on this route who reported catching the ferry in the afternoon or evening, suggesting that these users may simply be reflecting a higher proportion of return trips.

As with getting to the ferry, a majority of users reported it taking 3-10 minutes to also get to their destination once getting off the ferry.

Walking and driving a car or motorbike were the most common ways of travelling after getting off a ferry. Compared to getting to the ferry, users reported a stronger dependence on walking once they got off a ferry.

Table 19: Where did you go to after you caught the ferry? Q20 (Q14 User Survey)

<i>All Users</i> <i>Includes any whose used route</i>	Brooklyn	Central Coast	Church Point	Clarence River	Cronulla	Captain Cook	Palm Beach	All routes combined
<i>Sample size</i>	71	21	46	36	40	8	68	290
Home	55%	33%	46%	14%	28%	0%	32%	36%
Work	11%	0%	7%	0%	3%	63%	3%	7%
Place of study	0%	0%	4%	0%	0%	13%	1%	1%
Shopping	6%	0%	0%	11%	0%	0%	3%	3%
Medical appointment	11%	0%	0%	6%	5%	13%	1%	5%
Social/recreation activity	15%	67%	41%	69%	63%	0%	54%	45%
Something else	1%	0%	2%	0%	3%	0%	4%	2%
Can't recall	0%	0%	0%	0%	0%	13%	0%	0%

Table 20: Time taken to get to destination after catching ferry Q22 (Q16 User Survey)

<i>Users</i>	Brooklyn	Central Coast	Church Point	Clarence River	Cronulla	Captain Cook	Palm Beach	All routes combined
<i>Sample size</i>	71	21	46	36	40	8	68	290
Less than 2 minutes	6%	10%	20%	8%	5%	13%	7%	9%
3-5 minutes	31%	43%	20%	25%	33%	0%	29%	28%
6-10 minutes	34%	33%	26%	28%	30%	50%	22%	29%
11-15 minutes	6%	0%	20%	25%	25%	13%	13%	14%
Longer	24%	14%	15%	14%	8%	25%	28%	19%
<i>Can't recall</i>	0%	0%	0%	0%	0%	0%	0%	0%

Table 21: How did you get to where you were going after taking the ferry? (Multiple response) Q21 (Q15 User Survey)

<i>Users</i>	Brooklyn	Central Coast	Church Point	Clarence River	Cronulla	Captain Cook	Palm Beach	All routes combined
<i>Sample size</i>	71	21	46	36	40	8	68	290
Walked	59%	67%	50%	58%	73%	75%	46%	57%
Cycled	3%	5%	0%	3%	3%	0%	1%	2%
Drove and parked a car or motorcycle	23%	19%	33%	17%	10%	0%	19%	20%
Got dropped off	0%	5%	11%	8%	3%	0%	13%	7%
Taxi / Rideshare	1%	0%	2%	0%	0%	0%	0%	1%
Bus	0%	0%	7%	8%	3%	13%	15%	6%
Train	10%	5%	0%	0%	8%	0%	0%	4%
Water taxi	0%	0%	0%	0%	0%	0%	0%	0%
Private boat	1%	0%	2%	0%	0%	0%	0%	1%
Some other way	3%	0%	0%	0%	3%	0%	7%	3%
<i>Can't recall</i>	0%	0%	0%	6%	0%	13%	0%	1%

Last Trip: On Board Experiences

Overall no more than 1-in-5 users of any route reported that the ferry was more than three-quarters full on their last trip, and the majority that the ferry was no more than half full.

Table 22: On your most recent trip on the [route] ferry, how full was the ferry when it was most full? Q25 (Q19 User Survey)

<i>Users</i>	Brooklyn	Central Coast	Church Point	Clarence River	Cronulla	Captain Cook	Palm Beach	All routes combined
<i>Sample size</i>	71	21	46	36	40	8*	67	289
Less than qtr full	34%	29%	26%	6%	15%	25%	22%	23%
Quarter to half full	18%	14%	24%	19%	13%	0%	21%	18%
About half full	23%	14%	4%	36%	30%	63%	18%	22%
Half to three-qtrs full	17%	24%	26%	19%	25%	0%	22%	21%
More than three-qtrs	4%	10%	15%	19%	18%	0%	13%	12%
<i>Can't recall</i>	4%	10%	4%	0%	0%	13%	3%	3%

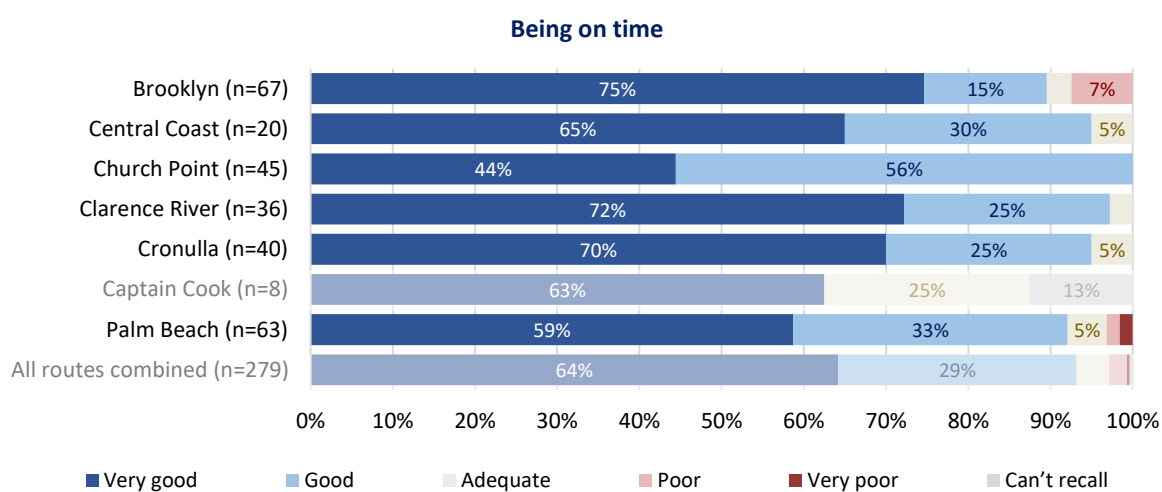
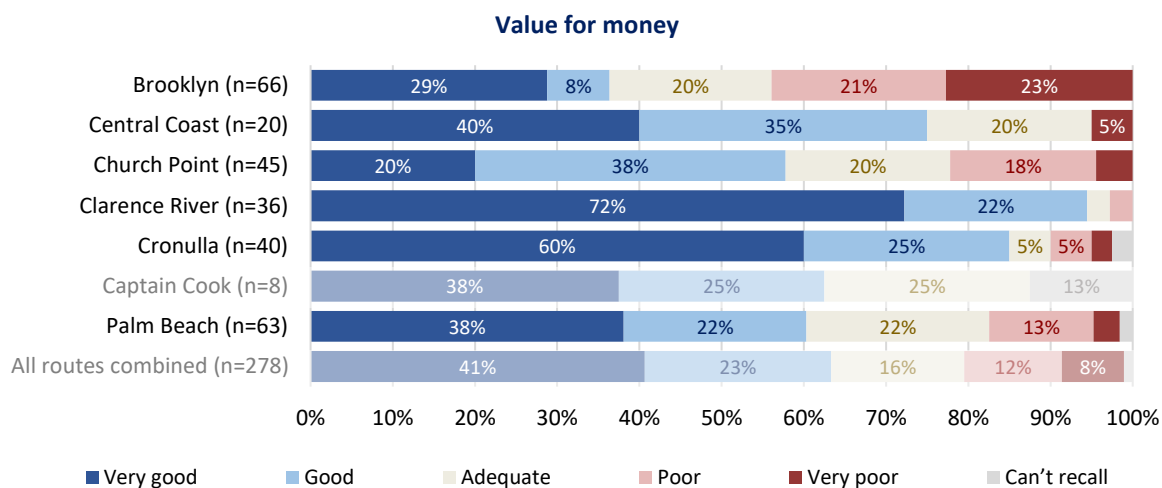
Overall satisfaction with the last trip users had made on all routes was very high, ranging from 87% to 100% by route. 40%-80% rated themselves as *very satisfied* with their last trip overall.

Table 23: Overall satisfaction with most recent trip Q29 (Q23 User Survey)

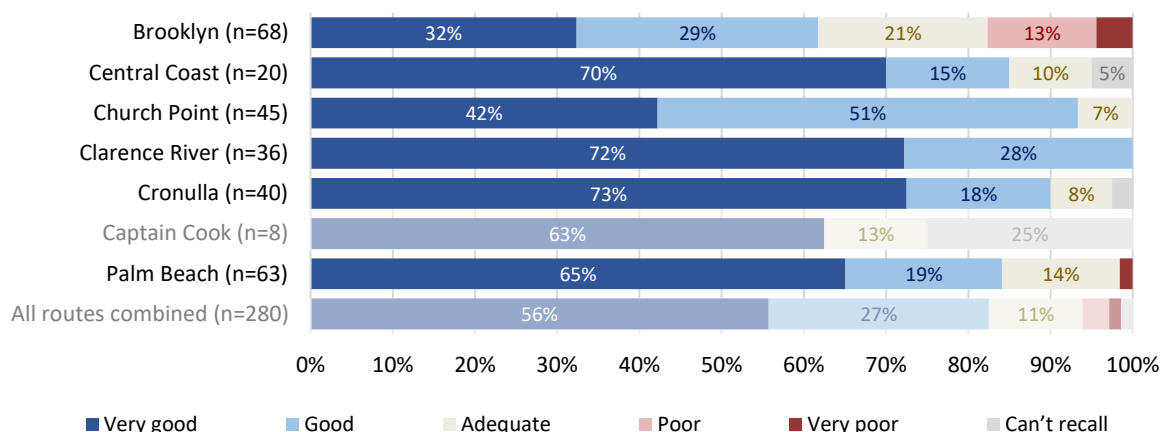
<i>Users</i>	Brooklyn	Central Coast	Church Point	Clarence River	Cronulla	Captain Cook	Palm Beach	All routes combined
<i>Sample size</i>	70	20	45	36	40	8*	64	283
Very satisfied	40%	60%	47%	75%	80%	63%	53%	56%
Satisfied	39%	35%	42%	25%	18%	13%	36%	33%
Partly satisfied	9%	5%	7%	0%	0%	13%	5%	5%
Neither satisfied nor dissatisfied	7%	0%	0%	0%	3%	0%	0%	2%
Partly dissatisfied	1%	0%	0%	0%	0%	0%	5%	1%
Dissatisfied	1%	0%	2%	0%	0%	0%	0%	1%
Very dissatisfied	3%	0%	2%	0%	0%	0%	2%	1%
<i>Can't recall</i>	0%	0%	0%	0%	0%	13%	0%	0%
Total satisfied including 'partly'	87%	100%	96%	100%	98%	88%	94%	94%
Total dissatisfied including 'partly'	6%	0%	4%	0%	0%	0%	6%	4%

Ratings of specific aspects of the ferry services did show a higher level of variation. Value for money and timing and availability showed the highest levels of variation across routes.

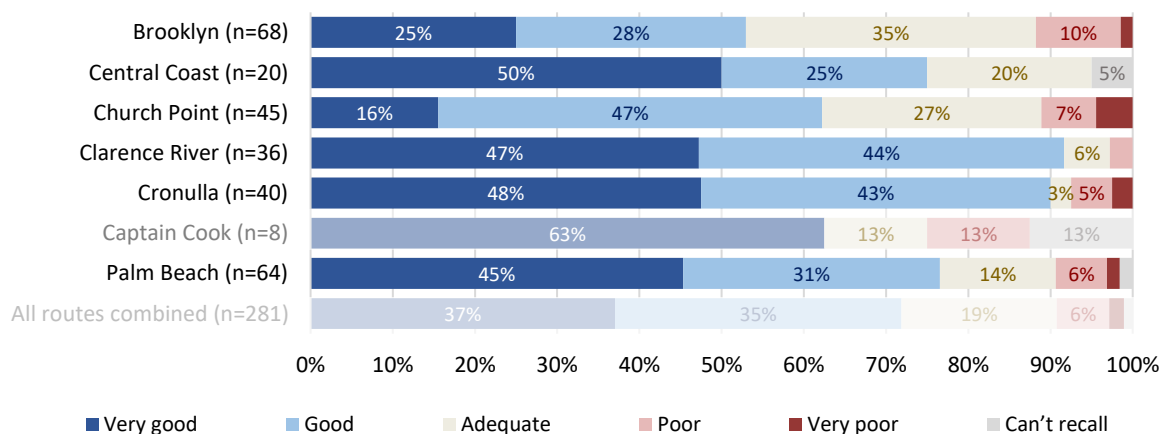
Figure 13: Rating aspects of most recent trip Q13 (Q7 User Survey)



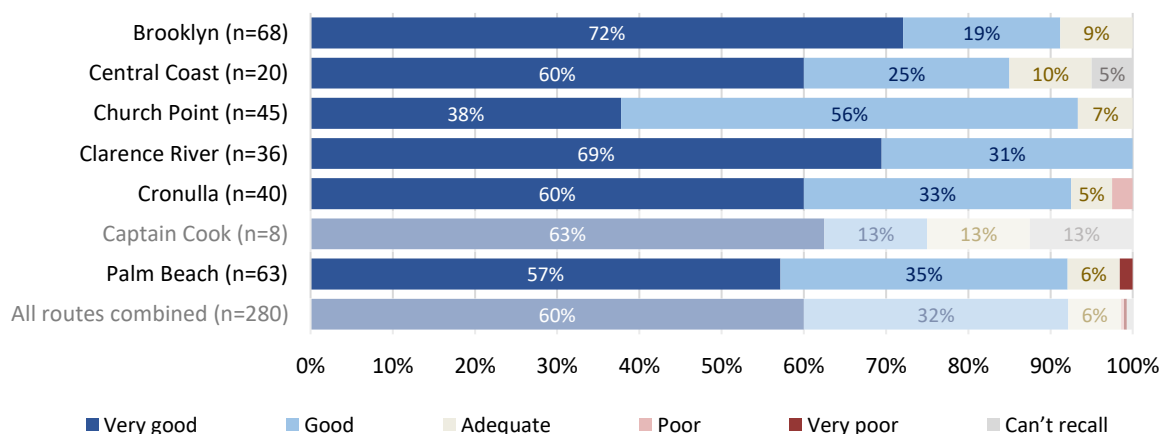
Customer service



Timing and availability of the ferry when you needed to travel



Cleanliness and the condition of the ferry



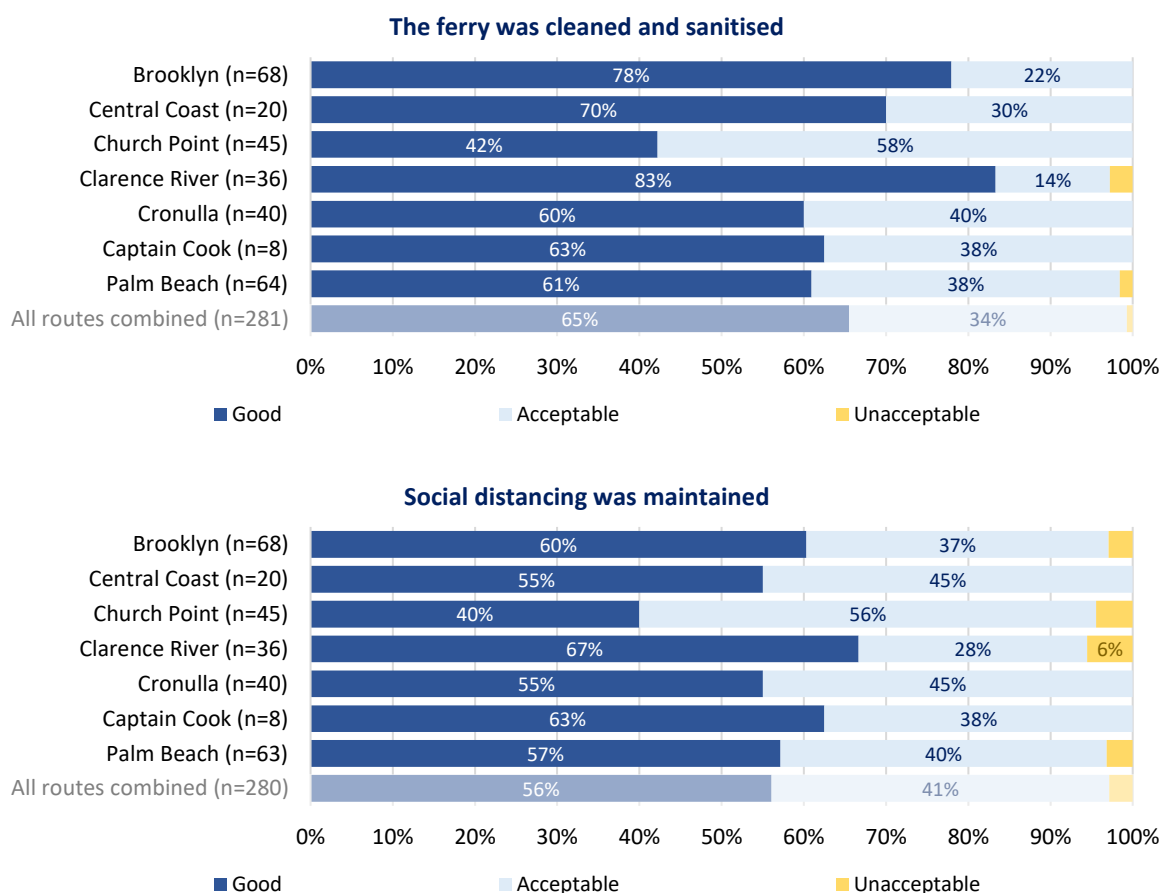
The high degree of satisfaction shown by users with the cleanliness and condition of the ferry was also reflected in perceptions of COVID-safety. 76% to 95% of users felt *very or totally confident* using the ferry in a COVID environment, and just 0% to 5% felt *not very or not at all confident* doing so.

Table 24: How confident were you using the [route] ferry in a COVID environment? Q31 (Q25 User Survey)

Users	Brooklyn	Central Coast	Church Point	Clarence River	Cronulla	Captain Cook	Palm Beach	All routes combined
<i>Sample size</i>	70	20	45	36	40	8*	64	283
Totally confident	50%	50%	40%	56%	45%	75%	47%	48%
Very confident	31%	35%	36%	33%	50%	13%	38%	36%
Somewhat confident	16%	10%	22%	8%	5%	13%	14%	13%
Not very confident	3%	0%	2%	3%	0%	0%	2%	2%
Not at all confident	0%	5%	0%	0%	0%	0%	0%	0%
Totally + very	81%	85%	76%	89%	95%	88%	84%	84%
Not very + not at all	3%	5%	2%	3%	0%	0%	2%	2%

Only isolated individual users rated the cleanliness and sanitising of the ferries as unacceptable; and only slightly more felt that social distancing wasn't acceptably maintained.

Figure 14: From a COVID-19 perspective, how well did you consider... Q32 (Q26 User Survey)



Fares and Value for Money

The types of tickets used were somewhat different across routes. For Brooklyn and Central Coast ferries the most commonly reported was a single trip ticket. For Church Point and the small group of Captain Cook Lane Cove route users, a multi-pass ticket was more common. For Clarence River, Cronulla and Palm Beach users most often reported using a concession card (note the relatively old age profile of the survey respondents, which may contribute to such high use of concession cards).

Table 25: Type of ticket used Q26 (Q20 User Survey)

<i>Users</i>	Brooklyn	Central Coast	Church Point	Clarence River	Cronulla	Captain Cook	Palm Beach	All routes combined
<i>Sample size</i>	71	21	45	36	40	8*	67	288
A single trip ticket	54%	48%	31%	25%	38%	38%	33%	39%
A multi-pass ticket	3%	19%	42%	11%	10%	50%	13%	16%
A concession card	42%	33%	27%	61%	53%	0%	52%	44%
<i>Can't recall</i>	1%	0%	0%	3%	0%	13%	1%	1%

There was a wide variation in the distribution of reported costs of last trip, both across and within routes. For three of the routes, Brooklyn, Church Point and Cronulla there was 18% to 31% of users who said their last trip was free – but no more than 3% of the other routes.

A considerable proportion of users could not recall how much their last trip had cost, with between 1-in-5 and 2-in-5 users unsure of the cost for all routes other than Brooklyn. Brooklyn, Central Coast and Palm Beach had the higher proportions of users reporting a fare of \$8 or more.

Table 26: Cost of trip Q27 (Q21 User Survey)

<i>Users</i>	Brooklyn	Central Coast	Church Point	Clarence River	Cronulla	Captain Cook	Palm Beach	All routes combined
<i>Sample size</i>	71	21	46	36	40	8*	67	289
Nothing, it was free	31%	0%	22%	3%	18%	0%	1%	14%
Less than \$5	8%	19%	4%	28%	23%	13%	7%	13%
\$5 to less than \$8	4%	14%	22%	25%	38%	50%	25%	21%
\$8 to less than \$10	48%	19%	13%	6%	5%	0%	12%	19%
\$10 to less than \$15	4%	19%	11%	6%	0%	0%	36%	13%
<i>Can't recall</i>	4%	29%	28%	33%	18%	38%	18%	19%

A majority of users of all private ferry services considered the value for money they experience using the route to be at least adequate. For all but the Brooklyn route, 61%-89% of users considered the value for money to be *good or very good*, and 79%-100% considered it *at least adequate*. Perceived value for money was slightly lower amongst those users surveyed about the Brooklyn route, where 36% said it was *good or very good*, and 57% that it was at least adequate.

Table 27: How would you rate the value for money of the [route] ferry? Q34 (Q28 User Survey)

<i>Users</i>	Brooklyn	Central Coast	Church Point	Clarence River	Cronulla	Captain Cook	Palm Beach	All routes combined
<i>Sample size</i>	67	20	44	36	40	8	59	274
Very good	27%	35%	25%	69%	68%	38%	29%	39%
Good	9%	35%	36%	19%	20%	38%	32%	24%
Adequate	21%	15%	18%	8%	5%	25%	27%	18%
Poor	25%	10%	14%	3%	5%	0%	8%	12%
Very poor	18%	5%	7%	0%	3%	0%	3%	7%
Total good	36%	70%	61%	89%	88%	75%	61%	64%
Total at least adequate	57%	85%	79%	96%	93%	100%	88%	81%
Total poor	43%	15%	20%	3%	8%	0%	12%	19%

Compared to other public transport ferries operated by Sydney Ferries, perceptions of the relative value of the private ferry services were positive for the Central Coast, Clarence River, Cronulla and Lane Cove routes. However, users of the Brooklyn, Church Point and Palm Beach routes considered the value for money to be somewhat less than those operated by Sydney Ferries.

Table 28: In general, compared to public transport ferries operated in NSW by Transport for NSW, would you consider the [ROUTE] ferry to be? Q35 (Q29 User Survey)

<i>Users</i>	Brooklyn	Central Coast	Church Point	Clarence River	Cronulla	Captain Cook	Palm Beach	All routes combined
<i>Sample size</i>	67	20	45	36	40	8	59	275
Much better value	7%	0%	9%	31%	25%	25%	10%	14%
A little better value	6%	30%	2%	17%	15%	0%	14%	11%
About the same	13%	40%	40%	25%	33%	50%	34%	29%
A little worse value	15%	10%	24%	0%	15%	13%	20%	15%
Much worse value	34%	5%	13%	3%	8%	0%	14%	15%
<i>Can't say</i>	24%	15%	11%	25%	5%	13%	8%	15%
Total better	13%	30%	11%	47%	40%	25%	24%	25%
Total at least same	26%	70%	51%	73%	73%	75%	58%	54%
Total worse	49%	15%	38%	3%	23%	13%	34%	31%
NET BALANCE (better minus worse)	-36%	15%	-27%	44%	18%	13%	-10%	-5%

Appendix A: Questionnaires

#5073 IPART Ferry Survey v2.6

CATI INTRO – ADAPT FOR ONLINE PANEL AS REQUIRED

Good [morning/ afternoon/ evening], my name is [INTERVIEWER NAME].

I am calling from ORIMA Research, an independent social research company, on behalf of the NSW government.

We're doing a 10-15 minute survey with people in very specific locations about the transport services available in their local area. This will help government to improve the services available to you.

1. Would you be interested to do the survey? If not right now, I can make a time to call you back.

1. Yes → CONTINUE
2. Yes, but not now → MAKE APPOINTMENT
3. No → Is there anyone else in the household aged 16 or over who I could ask about doing the survey? We are keen to hear from as many people as possible in these small local areas.

[REPEAT ABOVE INTRO IF RESPONDENT IS ANOTHER PERSON, IF NEEDED]:

Participation in this research is voluntary, you can choose not to answer any question and you can decide to stop participating in the interview at any time. What you tell me during the research will be treated as private, confidential and anonymous. Your answers will only be used for the purposes of the research. At any time during or after the interview, you can ask for your answers to not be used by ORIMA Research.

IF RESPONDENT ASKS TO REMAIN ANONYMOUS OR USE A PSEUDONYM READ OUT]:

You may [REMAIN ANONYMOUS/USE A PSEUDONYM] if you would like to. This will not affect the information you provide.

IF RESPONDENT ASKS WHICH PART OF NSW STATE GOVERNMENT IS CONDUCTING THE SURVEY: The survey is being conducted by IPART – the Independent Pricing and Regulatory Tribunal

Validation and Characteristics

1. Firstly, I just need to confirm that you do live in one of the areas we are focussing on.
What is the postcode where you live?

Postcode: _ _ _ _ NUMERIC (4 DIGITS ONLY).

- 1aa. Within the postcode [INSERT], which suburb do you live in?

SHOW LIST OF SUBURBS FROM LOCATION LIST, PLUS 'Other'

VALIDATE SUBURB AND POSTCODE AGAINST LOCATION LIST. SET "ROUTE" AS PER TABLE BELOW. IF POSTCODE DOES NOT MATCH ANY IN LIST OR SUBURB = 'Other' → ASK Q1A:

Route		Location		Route Description 1	Route Description 2
				INSERT INTO Q8	INSERT INTO Q9
1	Brooklyn	Dangar Island	2083	The Brooklyn Ferry service runs between Brooklyn and Dangar Island, with some trips also including Little Wobby.	between Brooklyn, Dangar Island and Little Wobby
		Brooklyn	2083		
		Little Wobby	2256		
		Patonga	2256		
		Mooney Mooney	2083		
2	Central Coast	Woy Woy	2256	Central Coast Ferries run between Woy Woy and Empire Bay, with stops at Davistown and Saratoga.	between Woy Woy, Davistown, Saratoga and Empire Bay
		Empire Bay	2257		
		Davistown	2251		
		Saratoga	2251		
		Blackwall	2256		
		Woy Woy Bay	2256		
		Phegans Bay	2256		
		Horsfield Bay	2256		
		Bensville	2251		
		Koolewong	2256		
3	Church Point	Church Point	2105	The Church Point Ferry Service has 4 stops on Scotland Island and 3 on the western foreshore of Pittwater, as well as Church Point.	between Scotland Island, Pittwater and Church Point
		Scotland Island	2105		
		Lovett Bay	2105		
		Morning Bay	2108		
		Bayview	2104		
		Mona Vale	2103		
		Newport	2106		
		Clareville	2107		
		Bilgola Plateau	2107		
		Bilgola Beach	2107		
		Avalon Beach	2107		

4	Clarence River	Yamba	2464	Clarence River Ferries run between Yamba and Iluka on the Clarence River.	between Yamba and Iluka
		Iluka	2466		
		Wooloweyah	2464		
		Angourie	2464		
5	Cronulla	Cronulla	2230	Cronulla Ferries runs between Cronulla and Bundeena.	between Cronulla and Bundeena
		Bundeena	2230		
6	Captain Cook Cruises	Riverview	2066	Captain Cook Cruises operates the route between Circular Quay and Lane Cove under contract with Transport for NSW.	with stops between Circular Quay and Lane Cove
		Lane Cove	2066		
		Hunters Hill	2110		
		Longueville	2066		
		Northwood	2066		
		Greenwich	2065		
		Birchgrove	2041		
7	Palm Beach	Palm Beach	2108	Palm Beach Ferries operate routes from Palm Beach to Ettalong via Wagstaffe and Palm Beach to Mackerel with stops at Bennets, Bonnie Doon, the Basin and Currawong.	between Palm Beach and either Ettalong or Mackerel
		Ettalong	2257		
		Wagstaffe	2257		
		Avalon	2108		
		Umina	2257		
		Umina Beach	2257		
		Pretty Beach	2257		
		Box Head	2257		
		Hardys Bay	2257		
		Booker Bay	2257		
		Kilcare	2257		
		Kilcare Heights	2257		
		Pearl Beach	2256		
		Great Mackerel Beach	2108		

1a. In the last 6 months, have you caught any of the following privately operated ferry services? Please select all that apply

1. **Brooklyn Ferry** between Brooklyn, Dangar Island and Little Wobby
2. **Central Coast Ferry** between Woy Woy, Davistown, Saratoga and Empire Bay
3. **Church Point Ferry** between Scotland Island, Pittwater and Church Point
4. **Clarence River Ferry** between Yamba and Iluka
5. **Cronulla Ferry** between Cronulla and Bundeena
6. **Captain Cook Cruises ferry service** with stops between Circular Quay and Lane Cove
7. **Palm Beach Ferry** between Palm Beach and either Ettalong or Mackerel
8. None of these → **Terminate**

IF NONE: Thank you for your interest in the survey. Unfortunately your postcode is not actually one of the places we are focussing on for this survey, and it seems you do not use any of the ferry services we are looking at in this survey.

IF SELECT ONLY ONE OF 1-7 IN 1a, SET "ROUTE" AS PER TABLE

ASK 1B ONLY IF HAVE USED MULTIPLE FERRIES IN LAST 6 MONTHS. SHOW ONLY THOSE
SELECTED IN 1a.

1b. Which of these ferries have you used most often in the last 6 months?

1. **Brooklyn Ferry** between Brooklyn, Dangar Island and Little Wobby
2. **Central Coast Ferry** between Woy Woy, Davistown, Saratoga and Empire Bay
3. **Church Point Ferry** between Scotland Island, Pittwater and Church Point
4. **Clarence River Ferry** between Yamba and Iluka
5. **Cronulla Ferry** between Cronulla and Bundeena
6. **Captain Cook Cruises ferry service** with stops between Circular Quay and Lane Cove
7. **Palm Beach Ferry** between Palm Beach and either Ettalong or Mackerel

IF ANSWER 1B, SET "ROUTE" AS PER TABLE

2. Which age group are you in?

8. Under 16 TERMINATE
9. 16 to 19
10. 20 to 29
11. 30 to 39
12. 40 to 49
13. 50 to 59
14. 60 to 69
15. 70 to 79
16. 80 and over

3. Which of these describe you? *Please select all that apply*

MULTIPLE RESPONSE

1. Working full-time] WORKING
2. Working part-time] WORKING
3. Full-time student] STUDYING
4. Part-time student] STUDYING
5. Unemployed
6. Household duties / caring for children
7. Retired
8. Disability / defence veteran or aged pensioner
9. Other

Use of transport services

In this survey we'll be talking about transport you can use to travel **"to or from your local area"**.

By this, we mean when you need to travel out of the suburb, or to get back to your suburb from other places. You may connect with other types of transport too – but it is the transport that starts or finishes closest to your home that we are talking about.

ASK ALL

4. Which of these transport services do you know of that you could potentially use to travel to or from your local area if you wanted to?

	RANDOMISE [ALWAYS ASK A-B TOGETHER]	Yes	No	Unsure
A	[ROUTE] ferry services	1	2	3
I	Brooklyn ferry services SHOW IF ROUTE = CENTRAL COAST, CHURCH POINT OR PALM BEACH	1	2	3
J	Central Coast ferry services SHOW IF ROUTE = BROOKLYN, CHURCH POINT OR PALM BEACH	1	2	3
K	Palm Beach ferry services SHOW IF ROUTE = BROOKLYN, CENTRAL COAST OR CHURCH POINT	1	2	3
B	Other ferry services ONLY IF ROUTE = CAPTAIN COOK	1	2	3
C	Bus services	1	2	3
D	Train services	1	2	3
E	Taxi / rideshare services	1	2	3
F	Water taxi services	1	2	3

ASK A-F ONLY IF AWARE OF SERVICES AT Q4

5. When was the last time you used each of these transport services that are available to travel to or from your local area?

	REPEAT ORDER FROM Q4, ADD G AND H AT END	In the last 6 months	7-12 months ago	More than 12 months ago	Never	Can't recall
A	[ROUTE] ferry services	1	2	3	4	5
I	Brooklyn ferry services SHOW IF ROUTE = CENTRAL COAST, CHURCH POINT OR PALM BEACH	1	2	3	4	5
J	Central Coast ferry services SHOW IF ROUTE = BROOKLYN, CHURCH POINT OR PALM BEACH	1	2	3	4	5
K	Palm Beach ferry services SHOW IF ROUTE = BROOKLYN, CENTRAL COAST OR CHURCH POINT	1	2	3	4	5
B	Other ferry services ONLY IF ROUTE = CAPTAIN COOK	1	2	3	4	5
C	Bus services	1	2	3	4	5
D	Train services	1	2	3	4	5
E	Taxi / rideshare services	1	2	3	4	5
F	Water taxi services	1	2	3	4	5
G	Private vehicles, like cars or motorbikes	1	2	3	4	5
H	Private boats	1	2	3	4	5

ASK A-F ONLY IF AWARE OF SERVICES AT Q4

6. Thinking about when you need to travel to or from your local area, even if you don't use it, how satisfied are you with:

	REPEAT ORDER FROM Q4, ADD G AT END	Very satisfied	Satisfied	Neither satisfied nor dissatisfied	Dissatisfied	Very dissatisfied	Can't say
A	[ROUTE] ferry services available to you	1	2	3	4	5	6
I	Brooklyn ferry services available to you SHOW IF ROUTE = CENTRAL COAST, CHURCH POINT OR PALM BEACH	1	2	3	4	5	6
J	Central Coast ferry services available to you SHOW IF ROUTE = BROOKLYN, CHURCH POINT OR PALM BEACH	1	2	3	4	5	6
K	Palm Beach ferry services available to you SHOW IF ROUTE = BROOKLYN, CENTRAL COAST OR CHURCH POINT	1	2	3	4	5	6
B	Other ferry services available to you ONLY IF ROUTE = CAPTAIN COOK	1	2	3	4	5	6
C	Bus services available to you	1	2	3	4	5	6
D	Train services available to you	1	2	3	4	5	6
E	Taxis / Rideshare available to you	1	2	3	4	5	6
F	Water taxi services available to you	1	2	3	4	5	6
G	Typical road and traffic conditions getting to and from your local area	1	2	3	4	5	6

ASK FOR ALL AWARE OF AT Q4

7. How long would it take you to walk from home to your nearest ...

		Less than 2 mins	3 to 5 mins	6 to 10 mins	11 to 15 mins	Longer	Don't know	I can't
A	[ROUTE] ferry terminal	1	2	3	4	5	6	7
B	Other ferry terminals ONLY IF ROUTE = CAPTAIN COOK	1	2	3	4	5	6	7
C	Useful bus stop	1	2	3	4	5	6	7
D	Train station	1	2	3	4	5	6	7
E	THERE IS NO PART E							
F	Place where you can catch a water taxi	1	2	3	4	5	6	7

The next few questions are specifically about **the [ROUTE] ferry service**.

[INSERT ROUTE DESCRIPTION 1 FROM TABLE]

8. Before doing this survey, how well did you know where the [ROUTE] ferry went to?

Would you say you:

1. Knew the details of the route
2. Knew roughly where it went
3. Didn't know much about where the ferry went
4. Didn't know about the ferry route at all

ASK ALL

9. Regardless of how often you currently use it, how potentially useful to you personally is a ferry service that goes [INSERT ROUTE DESCRIPTION 2] when travelling for:

		Essential	Very useful	Quite useful	Not very useful	Not at all useful	Not applicable
A	Work purposes [ONLY SHOW IF WORKING]	1	2	3	4	5	6
B	Study purposes [ONLY SHOW IF STUDYING]	1	2	3	4	5	6
C	Shopping	1	2	3	4	5	6
D	Medical appointments	1	2	3	4	5	6
E	Social or recreational purposes	1	2	3	4	5	6
F	Children in the household to get to school	1	2	3	4	5	6

ASK ALL

And how useful do you feel a ferry service that goes [INSERT ROUTE DESCRIPTION 2] is:

		Essential	Very useful	Quite useful	Not very useful	Not at all useful
G	<u>Overall</u> for you personally	1	2	3	4	5
H	Overall for the <u>community</u> (that is, not just for you personally)	1	2	3	4	5

ASK FOR ALL USED IN LAST 12 MONTHS [CODE 1 OR 2 AT Q5]

10. Of the types of transport you have used in the last 12 months, on average about how many times have you used them to travel to or from your local area in that time?

	REPEAT ORDER FROM Q4	6 or more times per week	3-5 times per week	1-2 times per week	2-3 times per month	Once every month	Less often	Can't say
A	[ROUTE] ferry services	1	2	3	4	5	6	7
I	Brooklyn ferry services SHOW IF ROUTE = CENTRAL COAST, CHURCH POINT OR PALM BEACH	1	2	3	4	5	6	7
J	Central Coast ferry services SHOW IF ROUTE = BROOKLYN, CHURCH POINT OR PALM BEACH	1	2	3	4	5	6	7
K	Palm Beach ferry services SHOW IF ROUTE = BROOKLYN, CENTRAL COAST OR CHURCH POINT	1	2	3	4	5	6	7
B	Ferry services (other than the [ROUTE] ferry) ONLY IF ROUTE = CAPTAIN COOK	1	2	3	4	5	6	7
C	Bus services	1	2	3	4	5	6	7
D	Train services	1	2	3	4	5	6	7
E	Taxi / rideshare services	1	2	3	4	5	6	7
F	Water taxi services	1	2	3	4	5	6	7
G	Private vehicles, like cars or motorbikes	1	2	3	4	5	6	7
H	Private boats	1	2	3	4	5	6	7

ASK IF USED [ROUTE] FERRY IN LAST 12 MONTHS [Q5a = CODE 1 OR 2]

11. In the last year have you used the [ROUTE] ferry more, less, or about the same amount?

1. More
2. The same
3. Less
4. Can't say

ASK IF USED FERRY MORE OR LESS OFTEN IN THE LAST 12 MONTHS

12. To what extent is your [INSERT “higher” or “lower”] use of the [ROUTE] ferry in the last 12 months due to the impact of things related to COVID?

1. Completely
2. Mostly
3. Somewhat
4. Not very much
5. Not related to COVID at all

Users and Last Trip Section

ASK IF USED [ROUTE] FERRY IN LAST 12 MONTHS [Q5a = CODE 1 OR 2] OTHERWISE GO TO NEXT SECTION [Q36]

13. How often do you use the [ROUTE] ferry for:

		6 or more times per week	3-5 times per week	1-2 times per week	2-3 times per month	Once every month	Less often	Never	Can't say
A	Work purposes [ONLY SHOW IF WORKING]	1	2	3	4	5	6	7	8
B	Study purposes [ONLY SHOW IF STUDYING]	1	2	3	4	5	6	7	8
C	Shopping	1	2	3	4	5	6	7	8
D	Medical appointments	1	2	3	4	5	6	7	8
E	Social or recreational purposes	1	2	3	4	5	6	7	8
F	Children in the household to get to school	1	2	3	4	5	6	7	8

These next few questions are specifically about just your **most recent trip** on the [ROUTE] ferry. Please just recall the details of the trip to the best of your ability if it was some time ago.

14. When was your most recent trip on the [ROUTE] ferry?

1. Today
2. Yesterday
3. Within the last week
4. Within the last month
5. Within the last 3 months
6. 3 - 6 months ago
7. 7-12 months ago

AUTOCODE AND DO NOT SHOW IF MOST RECENT TRIP = TODAY (CODE 1) OR YESTERDAY (CODE 2)

15. What day of the week was that trip?
1. Monday to Thursday
 2. Friday
 3. Saturday
 4. Sunday
 5. Can't recall
16. What time of the day was that most recent trip on the [ROUTE] ferry?
1. Before 9am
 2. 9am-12pm
 3. 12pm-4pm
 4. 4pm-7pm
 5. After 7pm
 6. Can't recall
17. Where did you come from before you last caught the [ROUTE] ferry?
1. Home
 2. Work
 3. School / College / University or other place of study
 4. Shopping
 5. Medical appointment
 6. Social / recreational activity
 7. Something else
 8. Can't recall
18. How did you get to the [ROUTE] ferry the last time you used it? *Please select all that apply*
1. Walked
 2. Cycled
 3. Drove and parked a car or motorcycle
 4. Got dropped off
 5. Taxi / Rideshare
 6. Bus
 7. Train
 8. Water taxi
 9. Private boat
 10. Some other way
 11. Can't recall
19. How long did it take you to get to the [ROUTE] ferry the last time you used it?
1. Less than 2 minutes
 2. 3-5 minutes
 3. 6-10 minutes
 4. 11-15 minutes
 5. Longer
 6. Can't recall

20. Where did you go to after you last caught the [ROUTE] ferry?
1. Home
 2. Work
 3. School / College / University or other place of study
 4. Shopping
 5. Medical appointment
 6. Social / recreational activity
 7. Something else
 8. Can't recall
21. What did you do when you got off the [ROUTE] ferry? *Please select all that apply*
1. Walked
 2. Cycled
 3. Drove my parked car or motorcycle
 4. Got picked up
 5. Taxi / Rideshare
 6. Bus
 7. Train
 8. Water taxi
 9. Private boat
 10. Something else
 11. Can't recall
22. How long did it take you to get where you were going when you got off the [ROUTE] ferry?
1. Less than 2 minutes
 2. 3-5 minutes
 3. 6-10 minutes
 4. 11-15 minutes
 5. longer
23. What was the main purpose of your most recent trip on the [ROUTE] ferry?
1. Getting to or from work
 2. Getting to or from school, TAFE, or university
 3. Medical appointment
 4. Shopping trip
 5. Social or recreational activity
 6. Other (please specify)
 7. Can't recall

24. On your most recent trip on the [ROUTE] ferry did you catch the ferry both ways, or just one way?
1. Both ways
 2. One way – leaving
 3. One way – coming back
 4. Can't recall
25. On your most recent trip on the [ROUTE] ferry, how full was the ferry when it was most full?
1. Less than a quarter full
 2. Quarter to half full
 3. About half full
 4. Half to three-quarters full
 5. More than three-quarters full
 6. Can't recall
26. What type of ticket did you use on your most recent [ROUTE] ferry trip?
1. A single trip ticket
 2. A multi-pass ticket
 3. A concession card
 4. Can't recall
27. What was the one-way fare on your most recent ferry journey?
1. Nothing, it was free
 2. Less than \$5
 3. \$5 to less than \$8
 4. \$8 to less than \$10
 5. \$10 to less than \$15
 6. Can't recall

28. How would you rate your last trip on the [ROUTE] ferry in terms of:

	RANDOMISE	Very good	Good	Adequate	Poor	Very poor	Can't recall
A	Value for money	1	2	3	4	5	6
B	Being on time	1	2	3	4	5	6
C	Cleanliness and the condition of the ferry	1	2	3	4	5	6
D	Customer service	1	2	3	4	5	6
E	Timing and availability of the ferry when you needed to travel	1	2	3	4	5	6

29. Overall, how satisfied or dissatisfied were you with your last trip on the [ROUTE] ferry?

1. Very satisfied
2. Satisfied
3. Partly satisfied
4. Neither satisfied nor dissatisfied
5. Partly dissatisfied
6. Dissatisfied
7. Very dissatisfied
8. Can't recall

30. On that last trip, to what extent did you choose your specific destination because the [ROUTE] ferry went there?

1. Not at all - I needed to go to that specific place
2. Somewhat - I chose to go there partly because the [ROUTE] ferry went there
3. Completely - I went there because the [ROUTE] ferry went there
4. Going on the [ROUTE] ferry was actually the main purpose

31. On your last trip on the [ROUTE] ferry, how confident were you using this type of transport in a COVID environment?

1. Totally confident
2. Very confident
3. Somewhat confident
4. Not very confident
5. Not at all confident

32. From a COVID perspective, for that last trip on the [ROUTE] ferry, how well did you consider:

		Good	Acceptable	Unacceptable
A	The ferry to have been cleaned and sanitised	1	2	3
B	Social distancing to be maintained	1	2	3

33. About how much would you spend in total in a typical month using the [ROUTE] ferry?

Please just give us your best guess.

\$ _____

34. Overall, how would you describe the value for money of the [ROUTE] ferry?

1. Very good
2. Good
3. Adequate
4. Poor
5. Very poor

35. In general, compared to public transport ferries operated in NSW by Transport for NSW, would you consider the [ROUTE] ferry to be:

1. Much better value
2. A little better value
3. About the same
4. A little worse value
5. Much worse value
6. Can't say

Perceptions of Ferries

ASK ALL

36. If you were to use the [ROUTE] ferry in the next week, how would you expect to find each of the following aspects?

RANDOMISE	Very good	Good	Adequate	Poor	Very poor	Don't know
Being available when you wanted or needed it	1	2	3	4	5	6
Being easy to get to where you catch it	1	2	3	4	5	6
Being easy to get where you needed to go at the other end	1	2	3	4	5	6
Value for money	1	2	3	4	5	6
How long it would take to get to your destination	1	2	3	4	5	6
Being an enjoyable way to travel	1	2	3	4	5	6
General cleanliness and condition of the ferry	1	2	3	4	5	6
Hygiene during COVID	1	2	3	4	5	6
Customer service	1	2	3	4	5	6
How easy it is to get on and off the ferry	1	2	3	4	5	6
Safety	1	2	3	4	5	6

ASK IF USED [ROUTE] FERRY IN LAST 12 MONTHS [Q5a = CODE 1 OR 2]

37. Do you feel it is easier to use the [ROUTE] ferry at some times of the year?

1. No – Equally easy to use throughout the year
2. Yes – easier to use during summer / warmer months
3. Yes – easier to use during winter / cooler months
4. Yes – easier to use at other times of the year (Specify: _____)

ASK IF NOT USED [ROUTE] FERRY IN LAST 12 MONTHS [Q5a = CODE 3-4-5]

38. Do you think it would be easier to use the **[ROUTE] ferry** at some times of the year?

1. No – Equally easy to use throughout the year
2. Yes – easier to use during summer / warmer months
3. Yes – easier to use during winter / cooler months
4. Yes – easier to use at other times of the year (Specify: _____)

ASK ALL

39. In the next 12 months, do you expect your use of the **[ROUTE] ferry** to change?

1. Expect to use it much more
2. Expect to use it a little more
3. Expect to use it about the same
4. Expect to use it a little less
5. Expect to use it a lot less

ASK ALL

40. In the next 12 months, would each of these things have a big effect, a small effect or no effect on getting you to use the **[ROUTE] ferry more often**?

RANDOMISE	Big effect	Small effect	No effect
If fares get cheaper	1	2	3
If it went to more locations or drop off points	1	2	3
If there is a shorter time to wait to get one	1	2	3
If they took less time to get to the destination	1	2	3
If customer service quality improves	1	2	3
If hygiene or cleanliness was improved	1	2	3
Making the ferries easier to get on and off	1	2	3

ASK ALL

41. Thinking about using **ferries in general**, if it was practical for your trip, compared to these other types of transport, would you prefer to use a ferry or prefer to use each other form of transport – or do you not have a preference either way?

RANDOMISE	Prefer the ferry	No preference either way	Prefer the other option
Buses	1	2	3
Trains	1	2	3
Taxis	1	2	3
Rideshare	1	2	3
Driving yourself	1	2	3

Users of Other Routes section

IF USED PRIMARY [ROUTE] FERRY IN LAST 12 MONTHS [Q5a = 1 OR 2] GO TO CLOSING DEMOGS Q42

IF **NOT** USED PRIMARY [ROUTE] FERRY IN LAST 12 MONTHS [Q5a = 3-4-5] **AND HAVE USED OTHER LOCAL FERRY IN LAST 12 MONTHS** [Q5 i / j / k = 1 OR 2] →

IF ONLY USED ONE OF THE [OTHER ROUTES] AT Q5 i / j / k →

You said you had used the **[OTHER ROUTE] ferry** within the last 12 months. We would like to ask you some questions about your use of that ferry route now.

THEN GO TO USERS AND LAST TRIP SECTION [Q13 – Q35] FOR [OTHER ROUTE]

IF USED TWO OR MORE OF THE [OTHER ROUTES] AT Q5 i / j / k →

46. You said you had used these other ferries within the last 12 months. Which of these ferry routes did you use most recently?

SHOW ONLY [OTHER ROUTES] USED IN LAST 12 MONTHS Q5 i / j / k = 1 OR 2

1. Brooklyn ferry service
2. Central Coast ferry service
3. Palm Beach ferry service

THEN GO TO USERS AND LAST TRIP SECTION [Q13 – Q35] FOR [OTHER ROUTE] SELECTED AT Q46

Closing Demographics

These last few questions are about you, so we can see if different people in the community have different opinions.

42. What is your gender?

1. Male
2. Female
3. Other
4. Prefer not to say

43. Are you eligible for any travel concessions? **Please select all that apply** MULTIPLE RESPONSE ALLOWED

1. Student concession
2. Seniors concession
3. DVA / Centrelink concession
4. Other concession (specify: _____)
5. No

44. Do you have a disability or impairment (such as a physical, intellectual, learning, and/or sensory disability)? **Please select all that apply** MULTIPLE RESPONSE ALLOWED
1. Yes – a physical disability or impairment
 2. Yes – an intellectual, learning or sensory disability or impairment
 3. No
 4. Prefer not to answer
45. Would you mind telling us your approximate household annual income from all sources before tax, bearing in mind that this information will remain strictly confidential and that ORIMA Research and its client have no way of identifying you? Just click on the answer below you believe comes closest, even if you are not completely sure.
1. Under \$30,000
 2. \$30,000 to under \$50,000
 3. \$50,000 to under \$80,000
 4. \$80,000 to under \$120,000
 5. \$120,000 or more
 6. Can't say
 7. Prefer not to say

Conclusion

CATI CLOSE – ADAPT FOR ONLINE PANEL AS REQUIRED

That brings us to the end of the interview. Thank you very much for your time and assistance today.

Are there any other people in the household aged 16 or over who might be willing to do this survey?

Just in case you missed it my name is [INTERVIEWER NAME] and this interview was conducted by ORIMA Research.

[IF NECESSARY]: If you have any queries about the questions in the survey, Action Market Research has a phone line that you can call if you wish to confirm our credentials. The number is 1800 077 789.

You have the right to access the information that we hold about you as a result of this interview. You may request at any time before we process and analyse the data to have this information de-identified or destroyed.

Thank you, have a great day/afternoon/evening!

#5073 IPART Ferry USER Survey v1

Note question 1-3 are system variables, not user response items.

Validation and Characteristics

This survey is specifically about several ferry routes in NSW.

4. Which of these ferries did you most recently use?
1. **Brooklyn** Ferry (Brooklyn, Dangar Island, Little Wobby)
 2. **Central Coast** Ferry (Woy Woy, Davistown, Saratoga, Empire Bay)
 3. **Church Point** Ferry (Scotland Island, Pittwater, Church Point)
 4. **Clarence River** Ferry (Yamba, Iluka)
 5. **Cronulla** Ferry (Cronulla and Bundeena)
 6. **Captain Cook Cruises** Ferry (Lane Cove to Circular Quay)
 7. **Palm Beach** Ferry (Palm Beach, Ettalong, Mackerel)
 8. **None** of these → **TERMINATE** "Thank you – this survey is only relevant for people who have used one of these ferries"

SET "ROUTE" AS PER Q4

We're doing a short (5 minute) survey with people in very specific locations about the transport services available in their local area. This will help government to improve the services available to you.

Participation in this research is voluntary, you can choose not to answer any question and you can decide to stop participating in the interview at any time. What you tell me during the research will be treated as private, confidential and anonymous. Your answers will only be used for the purposes of the research. At any time during or after the interview, you can ask for your answers to not be used by ORIMA Research.

5. What is the suburb and postcode where you live?

A	Suburb:
B	Postcode: _ _ _ _ NUMERIC (4 DIGITS ONLY).

6. Which age group are you in?

1. Under 14 → TERMINATE
2. 14 to 16 → DISPLAY PARENTAL CONSENT NOTE
3. 17 to 19
4. 20 to 29
5. 30 to 39
6. 40 to 49
7. 50 to 59
8. 60 to 69
9. 70 to 79
10. 80 and over

PARENTAL CONSENT NOTE: *If you are 16 or younger, please ask your parents for permission to do this survey. If you continue with the survey, it means that you have been given consent to participate in the Ferry User Survey.*

7. Which of these describe you? *Please select all that apply*

MULTIPLE RESPONSE

1. Working full-time] WORKING
2. Working part-time] WORKING
3. Full-time student] STUDYING
4. Part-time student] STUDYING
5. Unemployed
6. Household duties / caring for children
7. Retired
8. Disability / defence veteran or aged pensioner
9. Other

8. Have you done this specific survey about using ferries before in the last month?

1. No
2. Yes

IF YES → You're welcome to do the survey about as many individual trips as you like. We won't ask some questions again now, so the survey will be shorter and just about your current or latest trip.

Current and Last Trip Section

9. How often do you use the [ROUTE] ferry:

		6 or more times per week	3-5 times per week	1-2 times per week	2-3 times per month	Once every month	Less often
A	Overall	1	2	3	4	5	6

10. And how often do you use the [ROUTE] ferry specifically for:

		6 or more times per week	3-5 times per week	1-2 times per week	2-3 times per month	Once every month	Less often	Never	Can't say
A	Work purposes [ONLY SHOW IF WORKING]	1	2	3	4	5	6	7	8
B	Study purposes [ONLY SHOW IF STUDYING]	1	2	3	4	5	6	7	8
C	Shopping	1	2	3	4	5	6	7	8
D	Medical appointments	1	2	3	4	5	6	7	8
E	Social or recreational purposes	1	2	3	4	5	6	7	8
F	Children in the household to get to school	1	2	3	4	5	6	7	8

These next few questions are specifically about just your **most recent trip** on the [ROUTE] ferry.

11. When was your most recent trip on the [ROUTE] ferry?

1. Now
2. Today
3. Yesterday
4. Within the last week
5. Within the last month
6. Within the last 3 months
7. 3 - 6 months ago
8. More than 6 months ago

IF MOST RECENT TRIP = NOW, SHOW THE 'NOW' VERSION OF EACH QUESTION AND HIDE ALL 'CAN'T RECALL' OPTIONS IN THIS SECTION

AUTOCODE AND DO NOT SHOW IF MOST RECENT TRIP = NOW (CODE 1) OR TODAY (CODE 2) OR YESTERDAY (CODE 3)

12. What day of the week was that trip?

1. Monday to Thursday
2. Friday
3. Saturday
4. Sunday
5. Can't recall

AUTOCODE AND DO NOT SHOW IF MOST RECENT TRIP = NOW

13. What time of the day was that most recent trip on the [ROUTE] ferry?

1. Before 9am
2. 9am-12pm
3. 12pm-4pm
4. 4pm-7pm
5. After 7pm
6. Can't recall

14. Where did you come from before you last caught the [ROUTE] ferry?

1. Home
2. Work
3. School / College / University or other place of study
4. Shopping
5. Medical appointment
6. Social / recreational activity
7. Something else
8. Can't recall

NOW VERSION OF QUESTION: Where did you come from before you caught the [ROUTE] ferry?

15. How did you get to the [ROUTE] ferry the last time you used it?

1. Walked
2. Cycled
3. Drove and parked a car or motorcycle
4. Got dropped off
5. Taxi / Rideshare
6. Bus
7. Train
8. Water taxi
9. Private boat
10. Some other way
11. Can't recall

NOW VERSION OF QUESTION: How did you get to the [ROUTE] ferry?

16. How long did it take you to get to the [ROUTE] ferry the last time you used it?

1. Less than 2 minutes
7. 3-5 minutes
8. 6-10 minutes
9. 11-15 minutes
10. Longer
11. Can't recall

NOW VERSION OF QUESTION: How long did it take you to get to the [ROUTE] ferry?

17. Where did you go to after you last caught the [ROUTE] ferry?

1. Home
9. Work
10. School / College / University or other place of study
11. Shopping
12. Medical appointment
13. Social / recreational activity
14. Something else
15. Can't recall

NOW VERSION OF QUESTION: Where will you go to after you get off the [ROUTE] ferry?

18. What did you do when you got off the [ROUTE] ferry?

1. Walked
12. Cycled
13. Drove my parked car or motorcycle
14. Got picked up
15. Taxi / Rideshare
16. Bus
17. Train
18. Water taxi
19. Private boat
20. Something else
21. Can't recall

NOW VERSION OF QUESTION: What will you do when you get off the [ROUTE] ferry?

19. How long did it take you to get where you were going when you got off the [ROUTE] ferry?

1. Less than 2 minutes
6. 3-5 minutes
7. 6-10 minutes
8. 11-15 minutes
9. longer

NOW VERSION OF QUESTION: How long will it take you to get where you are going when you get off the [ROUTE] ferry?

20. What was the main purpose of your most recent trip on the [ROUTE] ferry?

1. Getting to or from work
8. Getting to or from school, TAFE, or university
9. Medical appointment
10. Shopping trip
11. Social or recreational activity
12. Other (please specify)
13. Can't recall

NOW VERSION OF QUESTION: What is the main purpose of this trip on the [ROUTE] ferry?

21. On your most recent trip on the [ROUTE] ferry did you, or will you, catch the ferry both ways, or just one way?

1. Both ways
5. One way – leaving
6. One way – come back
7. Can't recall

NOW VERSION OF QUESTION: Did you, or will you, catch the ferry both ways, or just one way?

22. On your most recent trip on the [ROUTE] ferry, how full was the ferry when it was most full?

1. Less than a quarter full
7. Quarter to half full
8. About half full
9. Half to three-quarters full
10. More than three-quarters full
11. Can't recall

NOW VERSION OF QUESTION: What is the most full the ferry will be on this trip?

23. What type of ticket did you use on your most recent [ROUTE] ferry trip?

1. A single trip ticket
5. A multi-pass ticket
6. A concession card
7. Can't recall

NOW VERSION OF QUESTION: What type of ticket are you using?

24. What was the one-way fare on your most recent ferry journey?

1. Nothing (free)
7. Less than \$5
8. \$5 to less than \$8
9. \$8 to less than \$10
10. \$10 to less than \$15
11. Can't recall

NOW VERSION OF QUESTION: What is the one-way fare for your ferry journey today?

25. How would you rate your last trip on the [ROUTE] ferry in terms of:

	RANDOMISE	Very good	Good	Adequate	Poor	Very poor	Can't recall
A	Value for money	1	2	3	4	5	6
B	Being on time	1	2	3	4	5	6
C	Cleanliness and the condition of the ferry	1	2	3	4	5	6
D	Customer service	1	2	3	4	5	6
E	Timing and availability of the ferry when you needed to travel	1	2	3	4	5	6

NOW VERSION OF QUESTION: How would you rate your trip on the [ROUTE] ferry in terms of?

26. Overall, how satisfied or dissatisfied were you with your last trip on the [ROUTE] ferry?

1. Very satisfied
9. Satisfied
10. Partly satisfied
11. Neither satisfied nor dissatisfied
12. Partly dissatisfied
13. Dissatisfied
14. Very dissatisfied
15. Can't recall

NOW VERSION OF QUESTION: Overall, how satisfied or dissatisfied are you with your trip on the [ROUTE] ferry?

27. On that last trip, to what extent did you choose your specific destination because the [ROUTE] ferry went there?

1. Not at all - I needed to go to that specific place
5. Somewhat - I chose to go there partly because the [ROUTE] ferry went there
6. Completely - I only went there because the [ROUTE] ferry went there
7. Going on the [ROUTE] ferry was actually the main purpose

NOW VERSION OF QUESTION: To what extent did you choose your specific destination today because the [ROUTE] ferry goes there?

28. On your last trip on the [ROUTE] ferry, how confident were you using the [ROUTE] ferry in a COVID environment?

1. Totally confident
2. Very confident
3. Somewhat confident
4. Not very confident
5. Not at all confident

NOW VERSION OF QUESTION: How confident are you using the [ROUTE] ferry today in a COVID environment?

29. From a COVID perspective, for that last trip on the [ROUTE] ferry, how well did you consider:

		Good	Acceptable	Unacceptable
A	The ferry to have been cleaned and sanitised	1	2	3
B	Social distancing to be maintained	1	2	3

NOW VERSION OF QUESTION: From a COVID perspective, for this trip on the [ROUTE] ferry, how well do you consider?

IF HAVE PREVIOUSLY DONE SURVEY [Q5 = 2] → GO TO CLOSING COMMENTS [Q35] AND THEN CLOSING DEMOGRAPHICS

Thank you for telling us about your last trip on the [ROUTE] ferry. We have a few more general questions now – if you do the survey again about any more trips, you will not be asked these next questions again.

30. About how much would you spend in total in a typical month using the [ROUTE] ferry?
Please just give us your best guess.

\$ _____

31. Overall, how would you describe the value for money of the [ROUTE] ferry?

1. Very good
2. Good
3. Adequate
4. Poor
5. Very poor

32. In general, compared to public transport ferries operated in NSW by Transport for NSW, would you consider the [ROUTE] ferry to be:

1. Much better value
2. A little better value
3. About the same
4. A little worse value
5. Much worse value
6. Can't say

Perceptions of Ferries

ASK ALL

33. If you were to use the [ROUTE] ferry in the next week, how would you expect to find each of the following aspects?

RANDOMISE	Very good	Good	Adequate	Poor	Very poor	Don't know
Being available when you wanted or needed it	1	2	3	4	5	6
Being easy to get to where you catch it	1	2	3	4	5	6
Being easy to get where you needed to go at the other end	1	2	3	4	5	6
Value for money	1	2	3	4	5	6
How long it would take to get to your destination	1	2	3	4	5	6
Being an enjoyable way to travel	1	2	3	4	5	6
General cleanliness and condition of the ferry	1	2	3	4	5	6
Hygiene during COVID	1	2	3	4	5	6
Customer service	1	2	3	4	5	6
How easy it is to get on and off the ferry	1	2	3	4	5	6
Safety	1	2	3	4	5	6

34. Do you feel it is easier to use the [ROUTE] ferry at some times of the year?

1. No – Equally easy to use throughout the year
2. Yes – easier to use during summer / warmer months
3. Yes – easier to use during winter / cooler months
4. Yes – easier to use at other times of the year (Specify: _____)

35. In the next 12 months, do you expect your use of the [ROUTE] ferry to change?

1. Expect to use it much more
2. Expect to use it a little more
3. Expect to use it about the same
4. Expect to use it a little less
5. Expect to use it a lot less

36. In the next 12 months, would each of these things have a big effect, a small effect or no effect on getting you to use the [ROUTE] ferry more often?

RANDOMISE	Big effect	Small effect	No effect
If fares get cheaper	1	2	3
If it went to more locations or drop off points	1	2	3
If there is a shorter time to wait to get one	1	2	3
If they took less time to get to the destination	1	2	3
If customer service quality improves	1	2	3
If hygiene or cleanliness was improved	1	2	3
Making the ferries easier to get on and off	1	2	3

ASK ALL

37. Thinking about using ferries in general, if it was practical for your trip, compared to these other types of transport, would you prefer to use a ferry or prefer to use each other form of transport – or do you not have a preference either way?

RANDOMISE	Prefer the ferry	No preference either way	Prefer the other option
Buses	1	2	3
Trains	1	2	3
Taxis	1	2	3
Rideshare	1	2	3
Driving yourself	1	2	3

38. Are there any other comments you would like to make about the [ROUTE] ferry service?

Closing Demogs

These last few questions are about you, so we can see if different people in the community have different opinions.

39. What is your gender?

1. Male
2. Female
3. Other
4. Prefer not to say

40. Are you eligible for any travel concessions? **Please select all that apply** MULTIPLE RESPONSE ALLOWED

1. Student concession
2. Seniors concession
3. DVA / Centrelink concession
4. Other concession (specify: _____)
5. No

41. Do you have a disability or impairment (such as a physical, intellectual, learning, and/or sensory disability)? **Please select all that apply** MULTIPLE RESPONSE ALLOWED

1. Yes – a physical disability or impairment
2. Yes – an intellectual, learning or sensory disability or impairment
3. No
4. Prefer not to answer

42. Would you mind telling us your approximate household annual income from all sources before tax, bearing in mind that this information will remain strictly confidential and that ORIMA Research and its client have no way of identifying you? Just click on the answer below you believe comes closest, even if you are not completely sure.

1. Under \$30,000
2. \$30,000 to under \$50,000
3. \$50,000 to under \$80,000
4. \$80,000 to under \$120,000
5. \$120,000 or more
6. Can't say
7. Prefer not to say

Conclusion

Thank you for doing this survey.

You're welcome to do the survey about as many individual trips as you like. After the first time you do it, we won't ask some questions again, so the survey will be shorter and just about your current or latest trip.

Appendix B: Catchment areas for resident survey

Route	Location		Route Description 1	Route Description 2
			INSERT INTO Q8	INSERT INTO Q9
Brooklyn	Dangar Island	2083	The Brooklyn Ferry service runs between Brooklyn and Dangar Island, with some trips also including Little Wobby.	between Brooklyn, Dangar Island and Little Wobby
	Brooklyn	2083		
	Little Wobby	2256		
	Patonga	2256		
	Mooney Mooney	2083		
Central Coast	Woy Woy	2256	Central Coast Ferries run between Woy Woy and Empire Bay, with stops at Davistown and Saratoga.	between Woy Woy, Davistown, Saratoga and Empire Bay
	Empire Bay	2257		
	Davistown	2251		
	Saratoga	2251		
	Blackwall	2256		
	Woy Woy Bay	2256		
	Phegans Bay	2256		
	Horsfield Bay	2256		
	Bensville	2251		
	Koolewong	2256		
Church Point	Church Point	2105	The Church Point Ferry Service has 4 stops on Scotland Island and 3 on the western foreshore of Pittwater, as well as Church Point.	between Scotland Island, Pittwater and Church Point
	Scotland Island	2105		
	Lovett Bay	2105		
	Morning Bay	2108		
	Bayview	2104		
	Mona Vale	2103		
	Newport	2106		
	Clareville	2107		
	Bilgola Plateau	2107		
	Bilgola Beach	2107		
	Avalon Beach	2107		
Clarence River	Yamba	2464	Clarence River Ferries run between Yamba and Iluka on the Clarence River.	between Yamba and Iluka
	Iluka	2466		
	Wooloweyah	2464		
	Angourie	2464		
Cronulla	Cronulla	2230	Cronulla Ferries runs between Cronulla and Bundeena.	between Cronulla and Bundeena
	Bundeena	2230		
Captain Cook Cruises	Riverview	2066	Captain Cook Cruises operates the route between Circular Quay and Lane Cove under contract with Transport for NSW.	with stops between Circular Quay and Lane Cove
	Lane Cove	2066		
	Hunters Hill	2110		
	Longueville	2066		
	Northwood	2066		
	Greenwich	2065		
	Birchgrove	2041		

Route	Location		Route Description 1	Route Description 2
			INSERT INTO Q8	INSERT INTO Q9
Palm Beach	Palm Beach	2108		
	Ettalong	2257		
	Wagstaffe	2257		
	Avalon	2108		
	Umina	2257	Palm Beach Ferries operate routes from Palm Beach to Ettalong via Wagstaffe and Palm Beach to Mackerel with stops at Bennets, Bonnie Doon, the Basin and Currawong.	between Palm Beach and either Ettalong or Mackerel
	Umina Beach	2257		
	Pretty Beach	2257		
	Box Head	2257		
	Hardys Bay	2257		
	Booker Bay	2257		
	Kilcare	2257		
	Kilcare Heights	2257		
	Pearl Beach	2256		
	Great Mackerel Beach	2108		

Appendix C: Sample demographics

Table 29: Employment status ^{Q3}

<i>Residents</i>	Brooklyn	Central Coast	Church Point	Clarence River	Cronulla	Captain Cook	Palm Beach	All regions combined
<i>Sample size</i>	69	101	104	104	99	104	104	685
Working full-time	29%	30%	25%	18%	36%	51%	28%	31%
Working part-time	22%	10%	18%	12%	13%	20%	18%	16%
Full-time student	1%	0%	2%	0%	3%	5%	2%	2%
Part-time student	0%	1%	1%	2%	0%	2%	0%	1%
Unemployed	0%	2%	2%	2%	1%	1%	1%	1%
Household duties / caring for children	0%	2%	1%	1%	0%	5%	1%	1%
Retired	48%	53%	54%	62%	45%	22%	50%	48%
Disability / defence veteran or aged pensioner	3%	1%	1%	7%	1%	1%	3%	2%
Other	0%	2%	2%	4%	2%	1%	0%	2%

Table 30: Employment status ^{Q3 (Q4 User Survey)}

<i>Users</i>	Brooklyn	Central Coast	Church Point	Clarence River	Cronulla	Captain Cook	Palm Beach	All routes combined
<i>Sample size</i>	69	101	104	104	99	104	104	685
Working full-time	29%	30%	25%	18%	36%	51%	28%	31%
Working part-time	26%	15%	21%	11%	14%	25%	24%	20%
Full-time student	1%	0%	8%	0%	2%	0%	1%	2%
Part-time student	1%	0%	2%	0%	0%	0%	0%	1%
Unemployed	0%	0%	3%	0%	0%	4%	4%	2%
Household duties / caring for children	9%	0%	2%	0%	0%	7%	0%	3%
Retired	34%	41%	42%	66%	50%	21%	39%	41%
Disability / defence veteran or aged pensioner	5%	4%	2%	8%	0%	0%	0%	3%
Other	1%	0%	5%	8%	5%	0%	1%	3%

Table 31: Eligibility for travel concessions ^{Q47}

Residents	Brooklyn	Central Coast	Church Point	Clarence River	Cronulla	Captain Cook	Palm Beach	All regions combined
<i>Sample size</i>	69	101	104	104	99	104	104	685
Student concession	1%	6%	4%	1%	3%	9%	4%	4%
Seniors concession	55%	51%	58%	60%	54%	27%	56%	51%
DVA / Centrelink concession	10%	9%	4%	22%	5%	6%	10%	9%
Other concession	1%	1%	0%	5%	2%	1%	2%	2%
None	36%	39%	35%	28%	39%	61%	33%	39%

Table 32: Eligibility for travel concessions ^{Q47 (Q37 User Survey)}

Users	Brooklyn	Central Coast	Church Point	Clarence River	Cronulla	Captain Cook	Palm Beach	All routes combined
<i>Sample size</i>	69	25	58	38	44	28	60	322
Student concession	0%	4%	10%	0%	2%	11%	3%	4%
Seniors concession	42%	48%	47%	61%	61%	25%	65%	51%
DVA / Centrelink concession	10%	4%	5%	32%	7%	4%	7%	10%
Other concession	1%	0%	2%	5%	0%	0%	0%	1%
None	51%	48%	36%	16%	32%	61%	28%	38%