



Review of maximum fares for private ferry services for 2022 to 2025 – survey results

## Information Paper

July 2021

Transport >>



### **The Independent Pricing and Regulatory Tribunal (IPART)**

We make the people of NSW better off through independent decisions and advice. IPART's independence is underpinned by an Act of Parliament. Further information on IPART can be obtained from [IPART's website](#).

### **Acknowledgment of Country**

IPART acknowledges the Traditional Custodians of the lands where we work and live. We pay respect to Elders, past, present and emerging.

We recognise the unique cultural and spiritual relationship and celebrate the contributions of First Nations peoples.

## Survey of private ferry usage

IPART has recently commenced a review to determine maximum fares for 7 private ferry operators that hold passenger service contracts with Transport for NSW (TfNSW) under the *Passenger Transport Act 2014*. The fares we determine in this review will apply from 1 January 2022 to 31 December 2025. We released an [Issues Paper](#) on 29 June 2021, and are seeking submissions in response to the questions raised in this by 6 August 2021.

To provide more information to help both IPART and stakeholders understand the role of these private ferry services in their communities we engaged ORIMA Research to design and conduct a survey about how people use private ferry services.

To ensure we reached as many people as possible, 2 surveys were undertaken:

1. A random survey of residents in the local areas immediately adjacent to the 7 private ferry routes. This commenced as an online survey and then continued as a phone survey to ensure enough respondents were reached and that both users and non-users of private ferries were captured.
2. A user survey designed to be undertaken on board the ferries. This was a shorter version of the main survey. All operators were approached to participate by promoting the survey on board their ferries and at their wharves.

This was the first time we have surveyed private ferry use. 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-19 on ferry use and confidence using ferries during COVID-19.



Source: ORIMA Research, *2021 Survey of Private Ferry Routes*, July 2021, p 1.

ORIMA Research's report sets out the results for each survey question. ORIMA has also prepared separate 1-page summaries capturing the key results for each private ferry operator:

- Brooklyn Ferry Service
- Captain Cook Cruises (Lane Cove route)
- Central Coast Ferries
- Church Point Ferry Service
- Clarence River Ferries
- Cronulla and National Park Ferry Service
- Palm Beach Ferries

## We will consider the results of the surveys in our draft determinations

As set out in our [Issues Paper](#), in making our draft determinations for maximum fares we will consider the results of the resident and passenger surveys.

In cases where the fare proposed by the private ferry operator does not recover the efficient costs of operating the ferry we will consider the appropriate balance between passengers and taxpayers; that is how much of any gap between proposed fares and the cost reflective fare should be met by taxpayers (via a government subsidy – the viability payment) and how much by passengers (via higher fares). Our consideration of this issue will be guided by a range of factors including the role of the private ferry in the community it services, and the factors that impact on people's decisions to use private ferries. The results of the surveys will be useful in answering these questions.

## Key findings

The survey results are presented by operator as they are separate businesses, with different characteristics in terms of passenger types and location.

The full results are in ORIMA Research's report and 1-page summaries linked above. Below we highlight some key results.

### Most residents consider their ferry service useful for their community

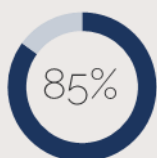
More than 88% of residents surveyed across all routes said that a ferry that serviced the route was at least *quite useful* to the community.<sup>1</sup> For the Brooklyn, Church Point, Cronulla and Palm Beach routes, at least half of the surveyed residents described the service as *essential* to their community.<sup>2</sup>

While the reasons for using private ferries varies from route to route, social/recreation purposes are the most likely potential use. Residents also considered the local ferry service to be useful for work, shopping, medical appointments and taking children to school.

Table 1 Potential usefulness of a ferry service by purpose (Residents) - % at least *quite useful*

Purpose	Brooklyn	Central Coast	Church Point	Clarence River	Cronulla	Captain Cook	Palm Beach
Work purposes (if work)	39%	31%	6%	23%	43%	42%	38%
Shopping	33%	17%	11%	15%	27%	25%	9%
Medical appointments	30%	12%	9%	9%	20%	4%	10%
Social/recreation	67%	64%	46%	76%	80%	64%	78%
Children to school	12%	7%	8%	2%	19%	7%	3%
<b>Overall - Personally</b>	<b>48%</b>	<b>50%</b>	<b>24%</b>	<b>61%</b>	<b>77%</b>	<b>47%</b>	<b>70%</b>
<b>Overall – to community</b>	<b>90%</b>	<b>95%</b>	<b>98%</b>	<b>97%</b>	<b>98%</b>	<b>88%</b>	<b>97%</b>

Source: ORIMA Research, 2021 Survey of Private Ferry Routes, July 2021, Table 2, p 16.



On average across all routes 85% of residents consider ferries as an enjoyable way to travel<sup>3</sup>

## Cheaper fares and more stops would have the most effect in increasing ferry use

Most users of all private ferry services considered the value for money they experience using the route is at least adequate. For all but the Brooklyn route, 61%-89% of users considered the value for money *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.<sup>4</sup>



Cheaper fares would have the biggest impact on usage for the Palm Beach and Captain Cook Lane Cove routes.

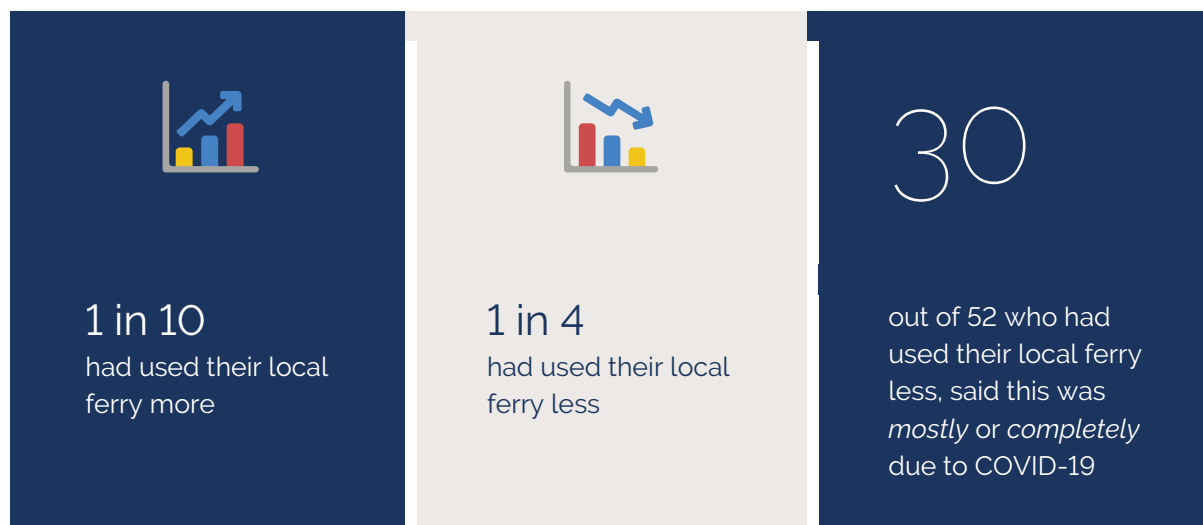
Table 2 Changes that would have at least a small effect in increasing ferry use

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

Source: ORIMA Research, 2021 Survey of Private Ferry Routes, July 2021, Table 9, p 42.

## COVID-19 significantly reduced private ferry use in in 2020

In our [Information Paper – context for the review](#) we showed how the COVID-19 pandemic had impacted patronage levels in 2020. Across all the residents who had used their nearest ferry in the last 12 months, the survey found 1 in 4 had used them less, and only 1 in 10 had used them more.<sup>5</sup>





## Have your say

Submissions on our Issues Paper are closing soon.  
Have your say by 6 August 2021.

[Submit feedback »](#)

Our Draft Report will be released in September 2021

- <sup>1</sup> ORIMA Research, *2021 Survey of Private Ferry Routes*, July 2021, p 16.
- <sup>2</sup> ORIMA Research, *2021 Survey of Private Ferry Routes*, July 2021, Table 3, p 17.
- <sup>3</sup> ORIMA Research, *2021 Survey of Private Ferry Routes*, July 2021, Table 7, p 37.
- <sup>4</sup> ORIMA Research, *2021 Survey of Private Ferry Routes*, July 2021, p 61.
- <sup>5</sup> ORIMA Research, *2021 Survey of Private Ferry Routes*, July 2021, p 22.