

NYS THRUWAY SERVICE AREAS: 2018 CUSTOMER EXPERIENCE SURVEY



INTRODUCTION

- On Monday, March 5 of this year, a **Service Areas Motorists Survey** was made available online (www.ThruwaySurvey.com).
- The Survey was provided as a general questionnaire along with 27 site-specific versions (e.g. Angola.ThruwaySurvey.com).
- The Survey was heavily promoted via NYSTA’s social media platforms, the Thruway mobile app, press release, signage/buck slips at all 27 Service Areas, and partnerships with the New York Chapter of AAA and the Trucking Association of New York.
- From start to finish (Monday, July 9, 2018), Surveys were completed by 2,645 participants.
 - 47.7 % Completion Rate
 - Average Time to Complete = 9:12
- Each Survey participant was required to state their primary use of the NYS Thruway:



DON'T USE/OTHER: 77 Responses | 2.9% of Total

CUSTOMER EXPERIENCE ANALYSIS: BIG PICTURE

- For the Services Areas, the **Customer Experience** (defined as the user's perception of these roadside amenities) is the “North Star” for the New York State Thruway Authority as it redevelops the properties.
- Four Metrics summarizes the current **Customer Experience** (0 – 10 Scale) for Key **Customer Segments** (**Occasional Thruway Users, Leisure Travelers, Commuters, and Road Warriors**):

6.3 WEIGHTED AVERAGE



SAFE & SECURE

I feel safe and secure when I stop at a Service Area. I don't have to keep a constant eye on my kids to be sure that they are safe.

2.7 WEIGHTED AVERAGE



AUTHENTIC & CONNECTED

I had a sense of where I am and what makes this place unique. I want to visit the surrounding area or plan future trip there.

4.1 WEIGHTED AVERAGE



WELCOMING & INVITING

The staff was friendly. The restrooms were clean. Service was quick. I was thanked for my purchase.

5.2 WEIGHTED AVERAGE



VISUALLY INTERESTING & ENGAGING

I want to post a picture of here on Facebook.

- NOTE: Commercial Drivers** completed a separate set of questions focused on the specific needs of the Trucking Industry.

CHARACTERISTICS

PERSONAL TRAVEL

WORK RELATED

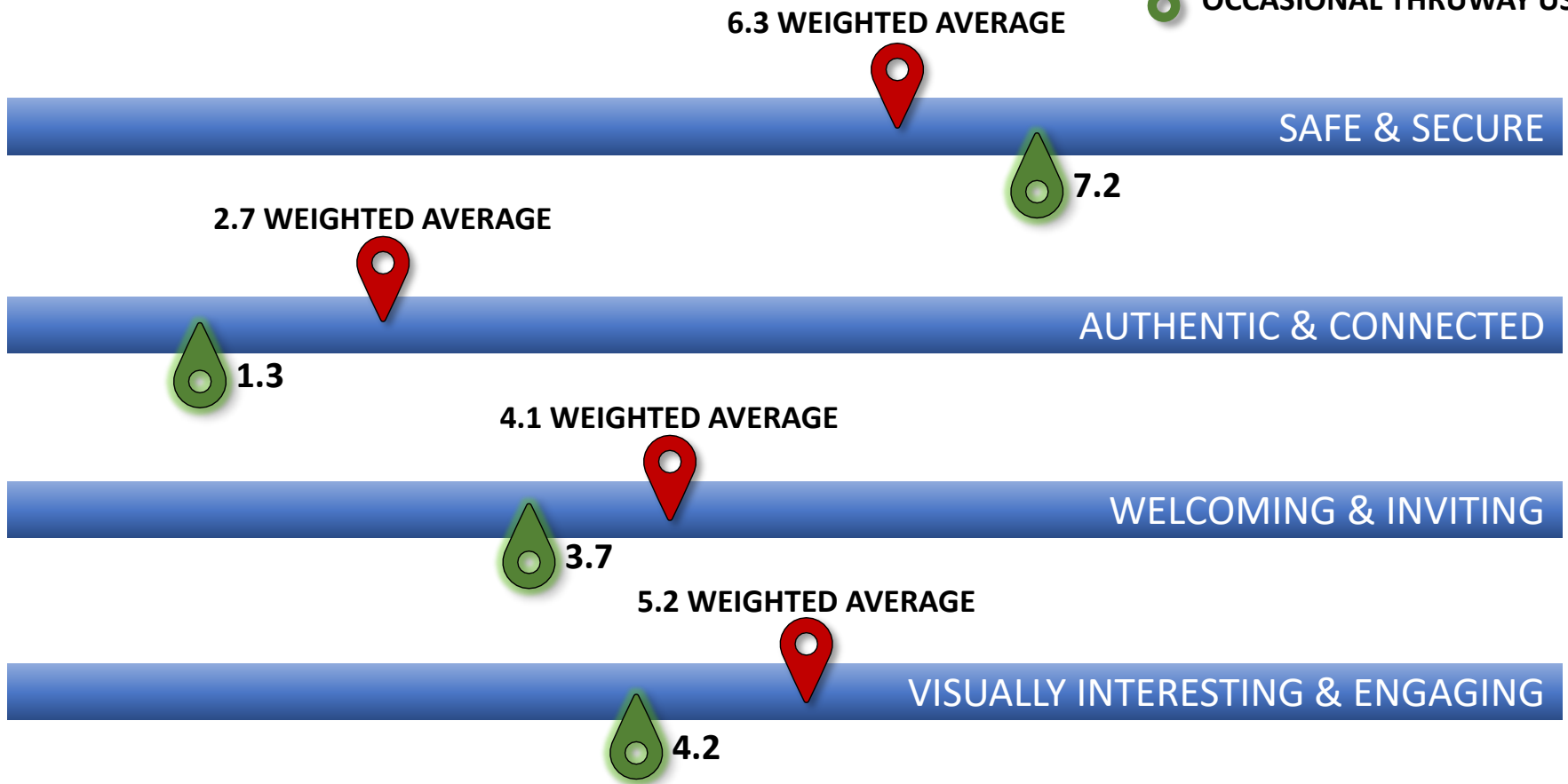
<p>Occasional Thruway User</p> <ul style="list-style-type: none"> • Shorter Trips (25 Miles or Less) • User of Thruway System, But Not Daily • Routing Varies Depending on Tasks at Hand • Seeks “Trip Chaining” Opportunities (e.g. Picking Up Dinner on the Way Home from an Appointment) 	<p>Commuter</p> <ul style="list-style-type: none"> • Passes Certain Service Plaza(s) Every Weekday • Looking for “Touch & Go” Products and Services (Drive Thru, Fueling) • Short Dwell Times Important (≤ 10 Minutes) • Heavy User of Time-Saving Apps (e.g. Starbucks Mobile Ordering, Thruway Mobile App for Real-Time Traffic Conditions)
<ul style="list-style-type: none"> • Vacationing or Traveling for a Personal Event (Class Reunion, Wedding, etc.) • Traveling 100+ Miles Away from Home • Likely Traveling with Family and/or Friends • Wants Unique Experiences • Typically Highest Customer Spend <p>Leisure Traveler</p>	<ul style="list-style-type: none"> • Typically Salesperson or District Manager • Looking for a Quiet Place to Work or Meet • Savvy User of Technology to Stay Connected and Productive (Great Wi-Fi and Access to Electrical Outlets Critical) <p>“Road Warrior”</p>

OCCASIONAL THRUWAY USER



THE FOUR CUSTOMER EXPERIENCE METRICS

 ALL CATEGORIES
 OCCASIONAL THRUWAY USERS ONLY



Takeaways

- Wants Service Areas to be a “Point of Pride” for Community
- OK with Pricing
- Top of Wish List: Food Hall and Take Out Dinner Options

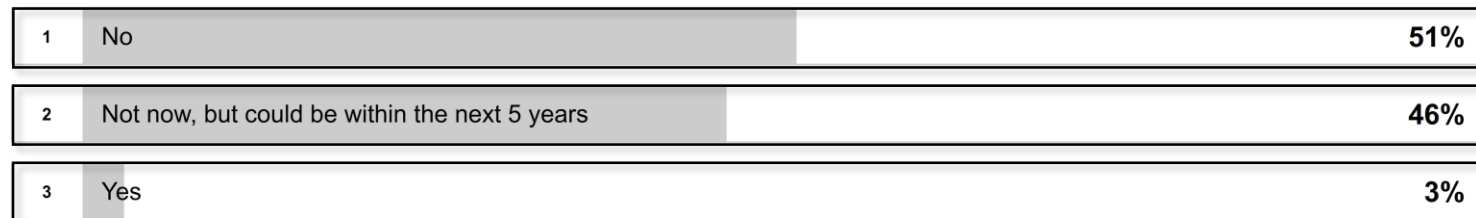
OCCASIONAL THRUWAY USERS (48.1% OF RESPONDENTS)

- **Definition:** An "Occasional Thruway User" who travels for personal appointments, shopping, errands, meeting up with family and friends, and social engagements.
- **Factoid:** 95% of Occasional Thruway Users surveyed are residents of the State of New York.
- **Selected Responses:**

As an occasional user of the Thruway, have you visited any of the New York State Thruway Services Areas (also known as Travel Plazas) in the past six months?



Is access to an electric car charging station important to you?



OCCASIONAL THRUWAY USERS

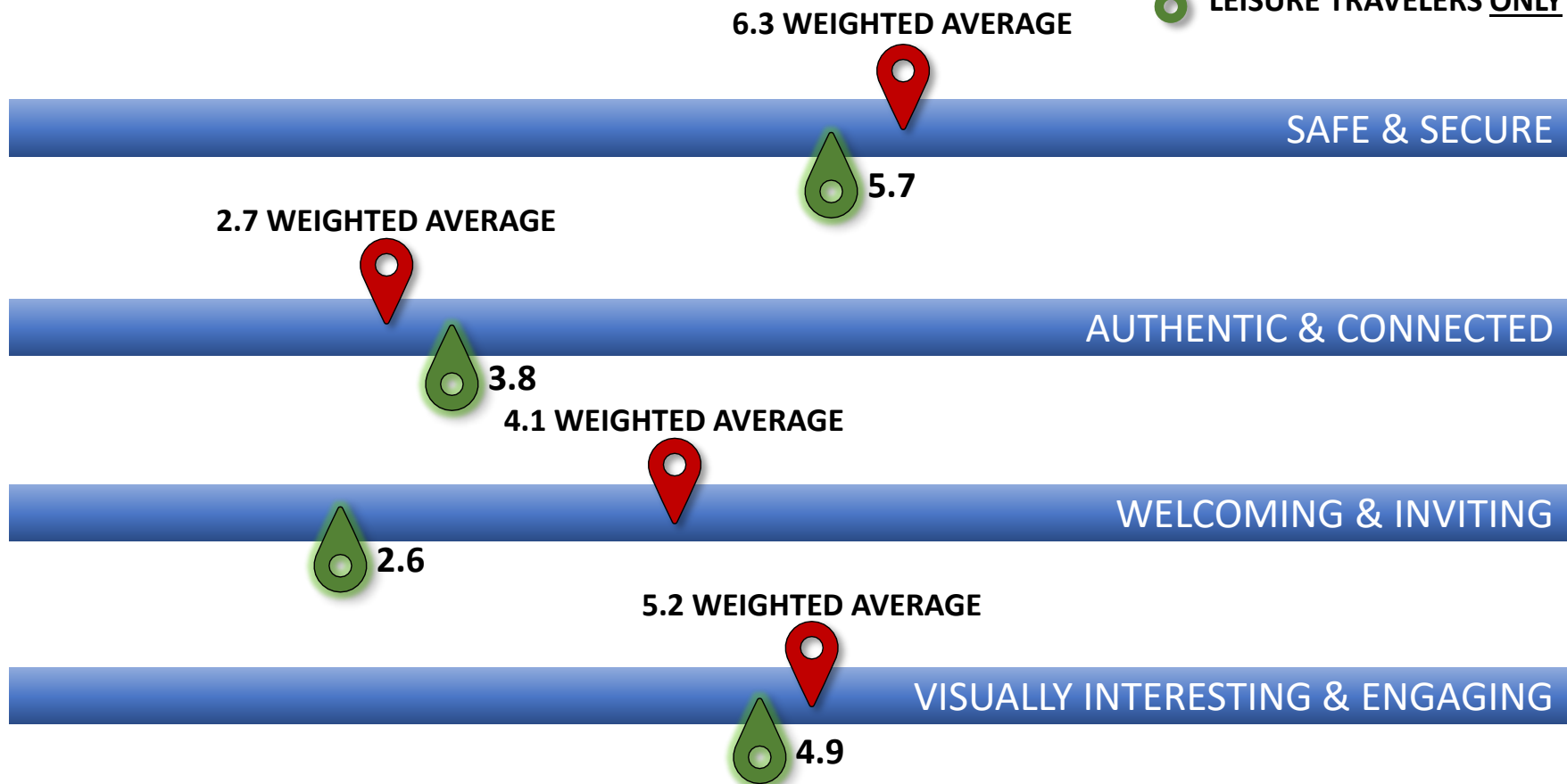
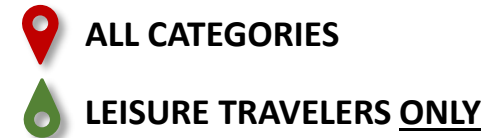
What services could be offered that would make the Service Areas more helpful to you?

1	Food Hall with local artisan food & beverage offerings	56%
2	Take-Out Individual or Family-Style Meals	42%
3	Drive Thru Service	41%
4	Auto Services including minor repairs and oil change	31%
5	Sale of New York State wine/beer/spirits for home use	23%
6	Carwash	22%
7	Park & Ride, Shuttle Service, Carpooling	16%
8	Meal Kits (e.g. Blue Apron)	7%
9	Business Center/Conference Room	5%
10	Amazon Lockers or other eCommerce pickup	4%
11	Other	4%
12	Dry Cleaning/Laundry Drop-Off/Pick-Up	1%

LEISURE TRAVELER



THE FOUR CUSTOMER EXPERIENCE METRICS

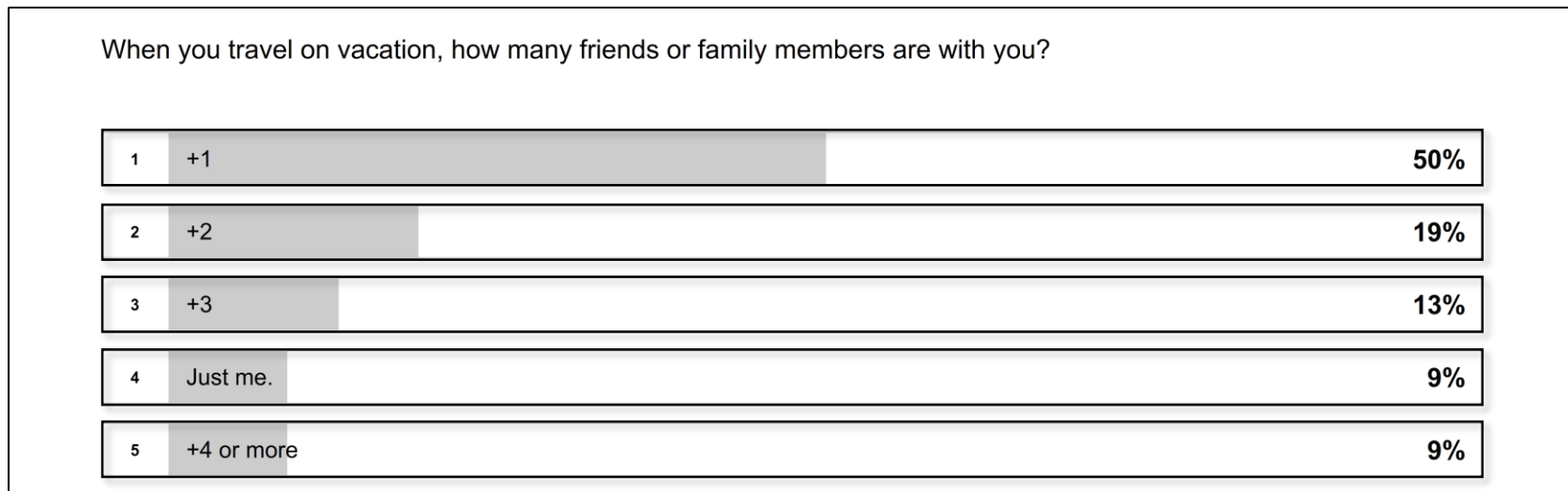


Takeaways

- Service Areas Lack “Instagram-able” Moments
- Positive about Exterior — Negative about Interior Layout
- Strongly Feels Offering are Overpriced
- Top of Wish List: Activities for Children/Family, Outdoor Amenities

LEISURE TRAVELER (27.1% OF RESPONDENTS)

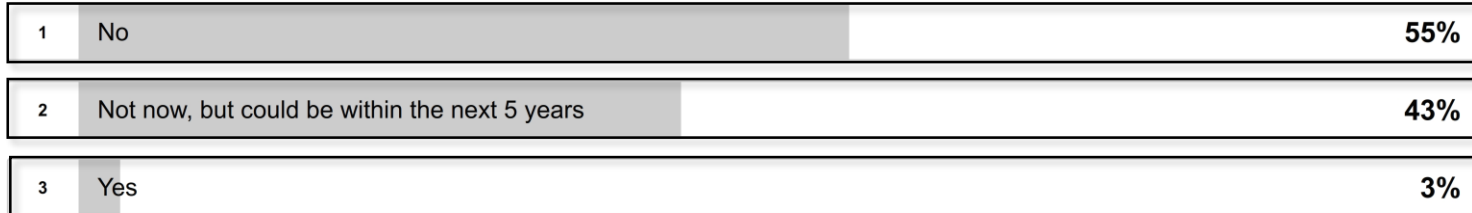
- **Definition:** A "Leisure Traveler" sightsees, visits historical places, or engages in other related activities. Typically, someone who is on vacation or a weekend getaway.
- **Factoid:** 77% of surveyed Leisure Travelers' trips involve at least one overnight stay.
- **Selected Responses:**



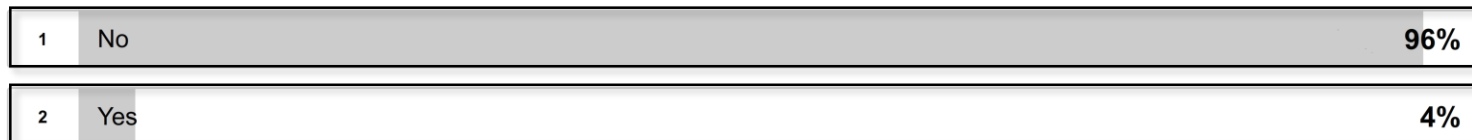
91% of Leisure Travelers surveyed had at least 1 additional passenger on their trip.

LEISURE TRAVELER

Is access to an electric car charging station important to you?



Do you typically travel in a recreational vehicle (RV), trailer, or camper?

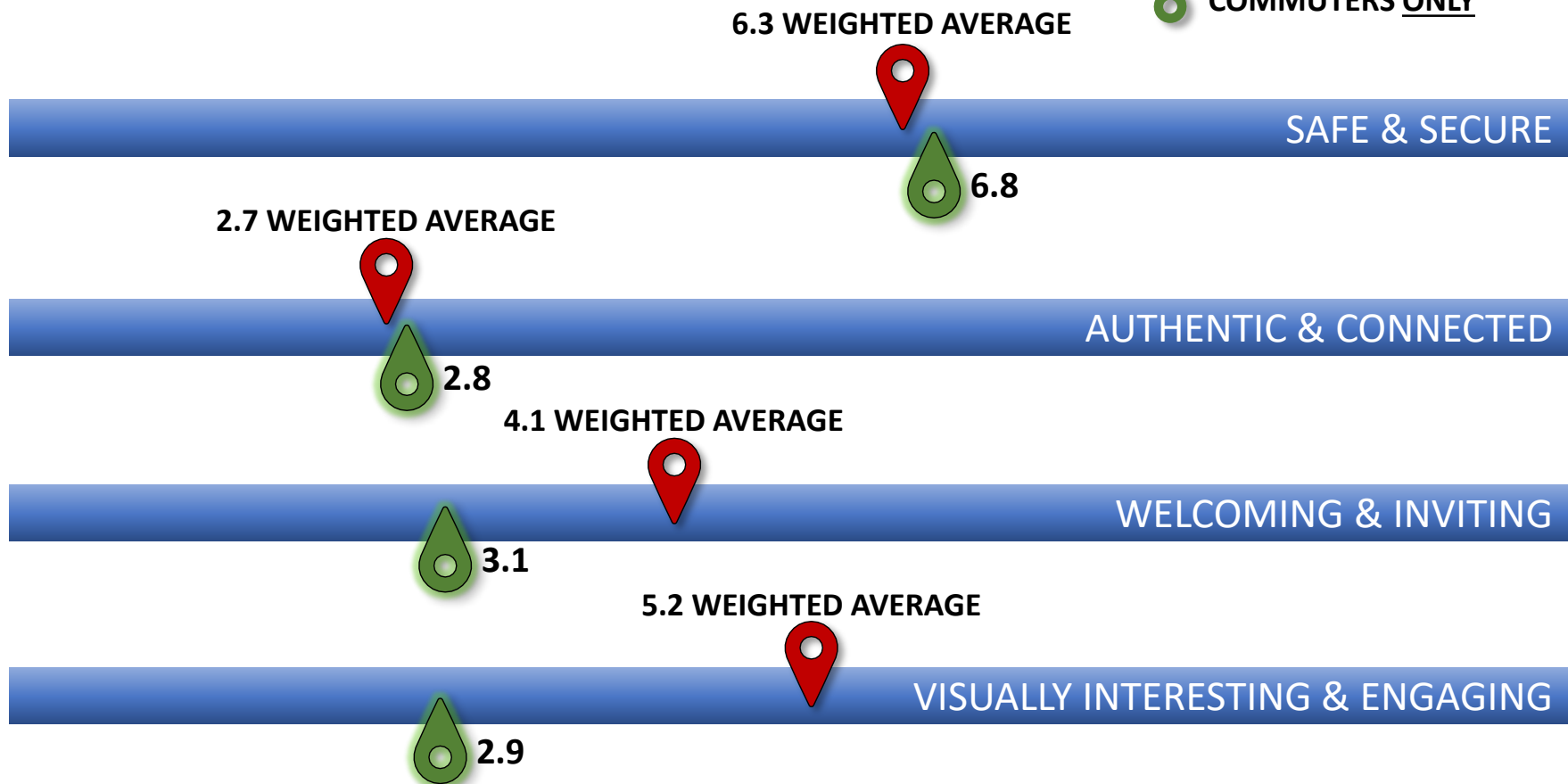
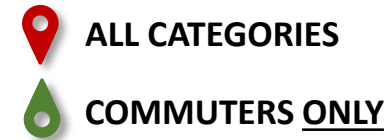


NYS THRUWAY SERVICE AREAS: 2018 CUSTOMER EXPERIENCE SURVEY

COMMUTER



THE FOUR CUSTOMER EXPERIENCE METRICS



Takeaways

- Focused on Functionality and Not Architecture
- 78% of Commuters Stop To Use Restrooms
- Group Most Likely To Purchase Fuel
- Top of Wish List: Drive-Thru, Faster Service

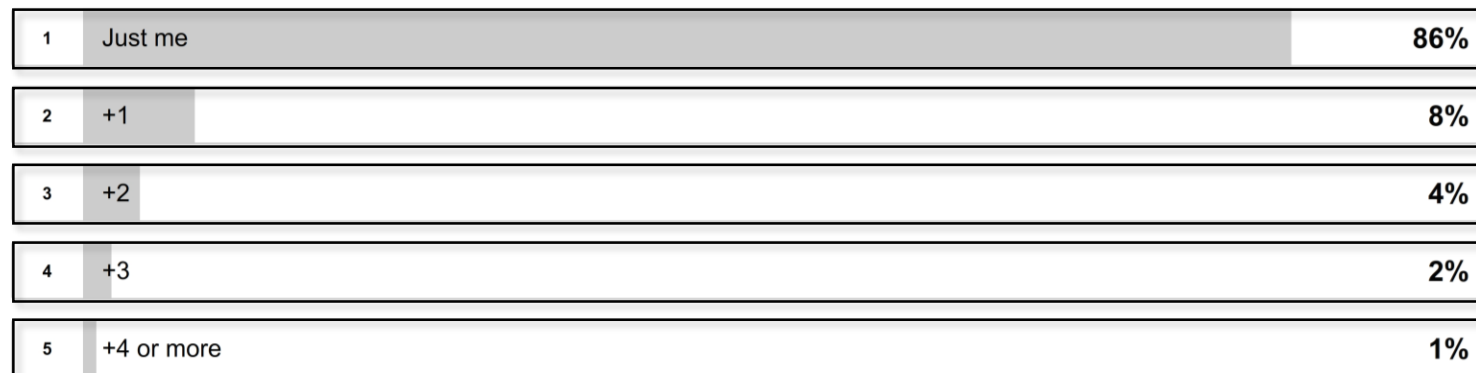
COMMUTER (9.9% OF RESPONDENTS)

- **Definition:** A "Commuter" who travels from home to work/school and back on a daily basis.
- **Factoid:** 41% of Commuters surveyed travel more than 50 miles each way in their commute.

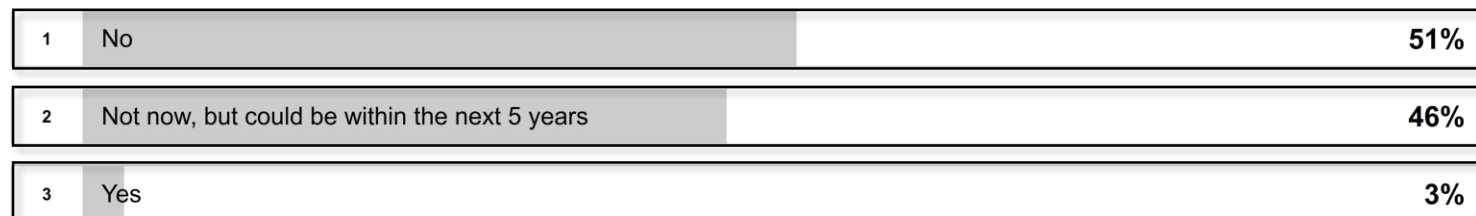
Are you a "stretch" Commuter (drive 50 miles or more **one way**)?



How many people normally carpool with you?

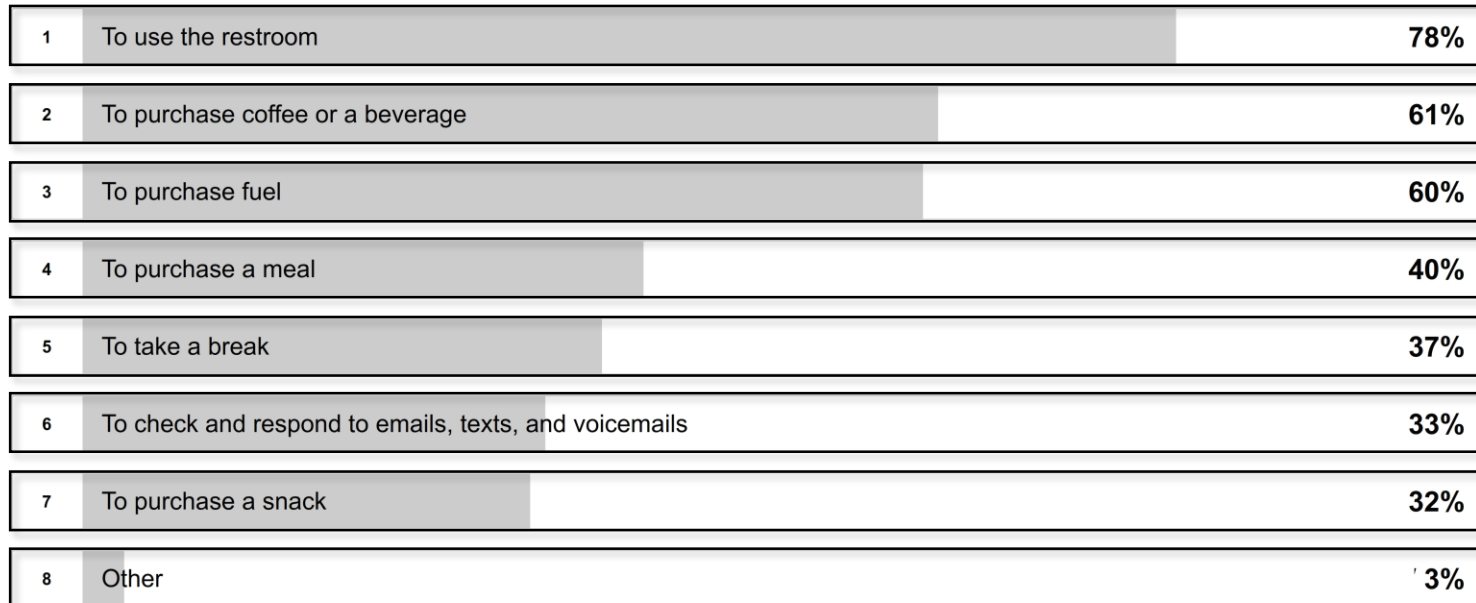


Is access to an electric car charging station important to you?

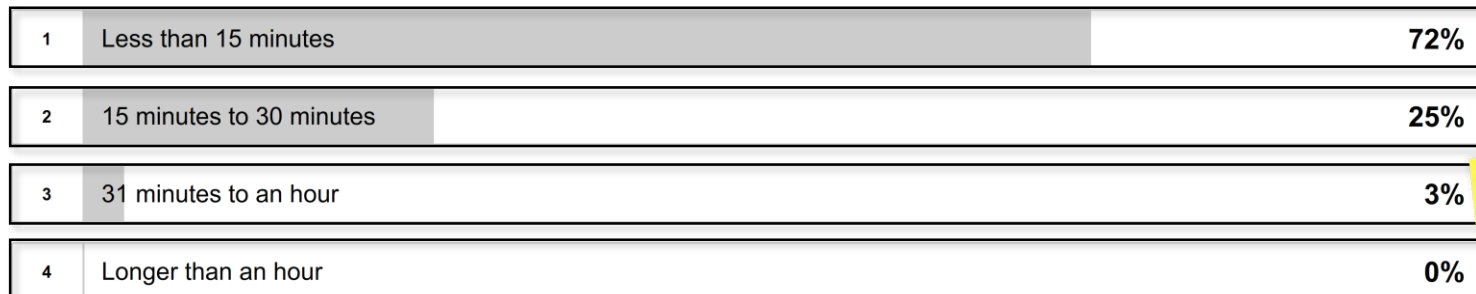


COMMUTER

Since you have stopped at a Service Area as part of your commute, please tell us why.



Normally how long do you stop at a Service Area?



70% of commuters are AAA members, but only 26% have the Thruway mobile app.

COMMUTER



Since you normally don't stop at the Service Areas as part of your commuting routine, what services would entice you to use the facilities more often?

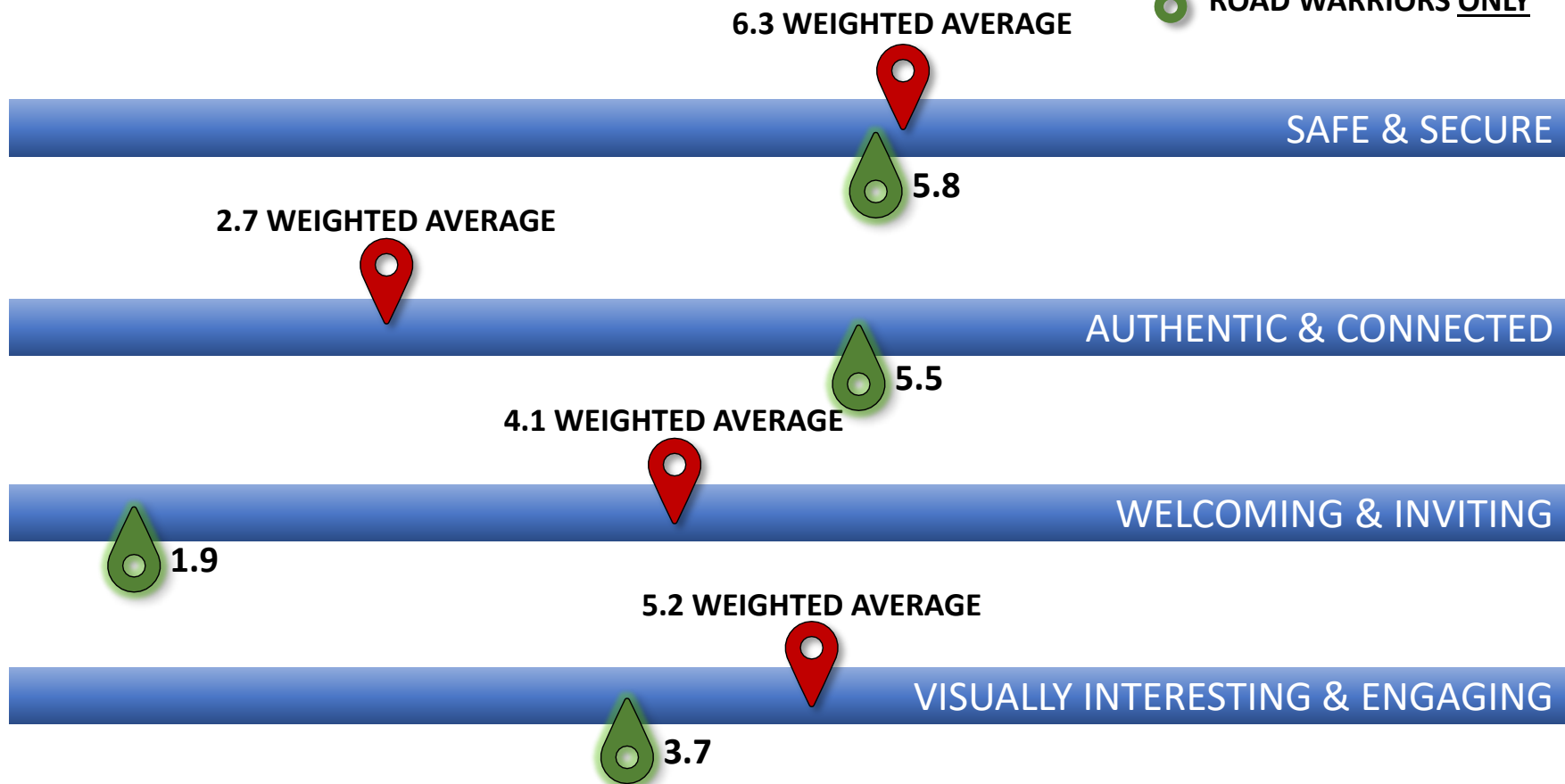
1	Drive Thru Window Service	46%
2	Carwash	28%
3	Take-Out Individual or Family-Style Meals	28%
4	To purchase New York State packaged wine/beer/spirits for home use	24%
5	Mobile Order Ahead	20%
6	Park & Ride, Shuttle Service, Carpooling	19%
7	Amazon Lockers or other eCommerce pickup	15%
8	Auto Services including Minor Repairs and Oil Change	13%
9	Meal Kits (e.g. Blue Apron)	12%
10	Other	12%
11	Dry Cleaning/Laundry Drop-Off/Pick-Up	7%
12	Business Center/Conference Room	5%

ROAD WARRIOR/MOBILE WORKER



THE FOUR CUSTOMER EXPERIENCE METRICS

 ALL CATEGORIES
 ROAD WARRIORS ONLY

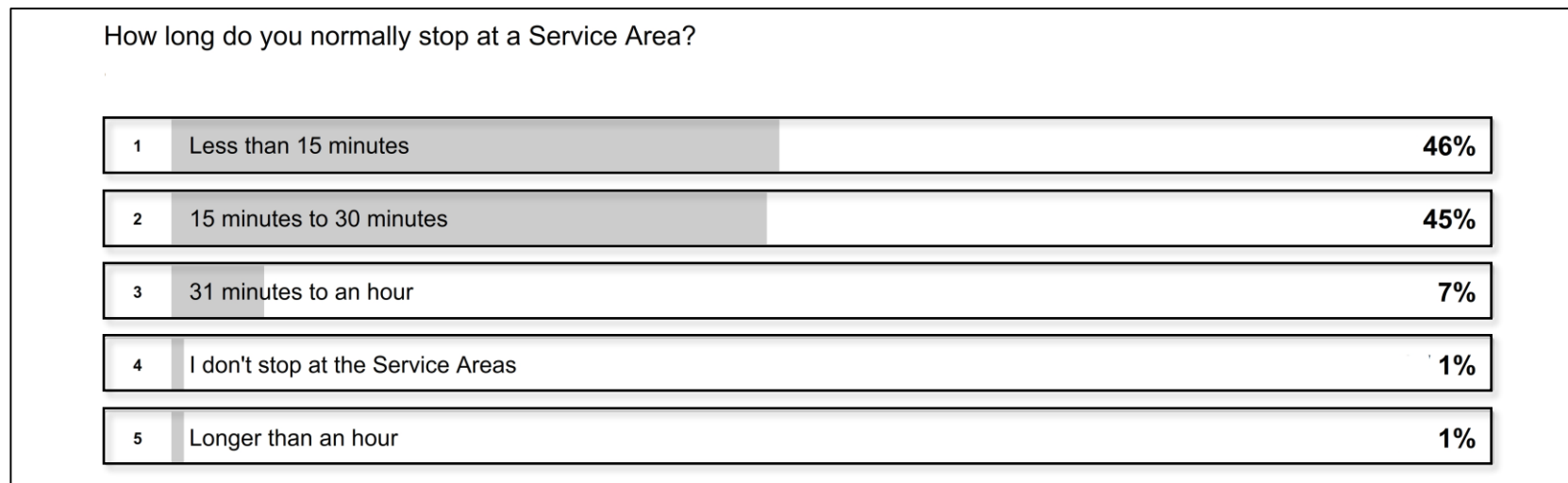


Takeaways

- Smallest Sampling of Four Customer Segments Skewing Results
- Wants “Small Luxuries” (Comfortable Chairs, Quiet Spots, Food Hall)
- Top of Wish List: Carwash, Oil Change

ROAD WARRIOR/MOBILE WORKERS (7.5% OF RESPONDENTS)

- **Definition:** A "Road Warrior/Mobile Worker" frequently travels by car for business appointments and meetings.
- **Factoid:** 31% of Road Warriors surveyed use the Thruway mobile app on a routine basis (Average of All Respondents = 13%).
- **Selected Responses:**



- Road Warriors were asked to rate the following potential Service Areas amenities on a 1 – 10 Star basis...

Business Center		4.86 Average Rating
Flexible Meeting Spaces		3.41 Average Rating
Hotel Accommodations		3.80 Average Rating
Auto Repair Service		5.14 Average Rating
Mobile Order Ahead		5.35 Average Rating
Food Hall		6.84 Average Rating

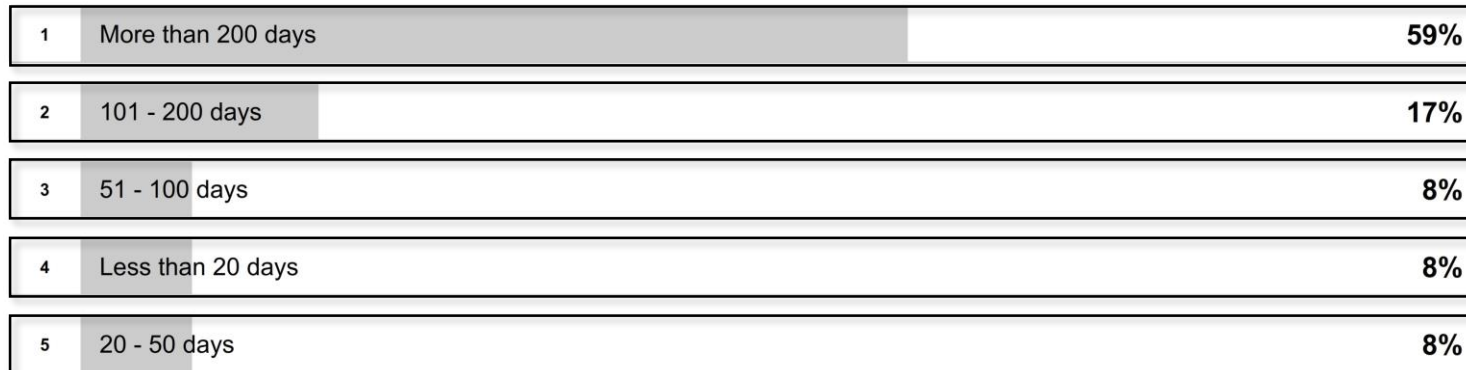
COMMERCIAL DRIVER



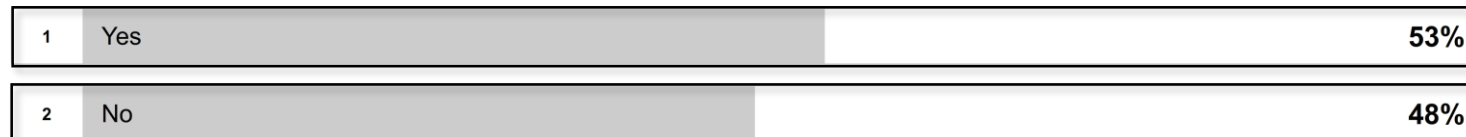
COMMERCIAL DRIVERS (4.5% OF RESPONDENTS)

- **Definition:** A "Commercial Driver" hauls freight or makes deliveries.
- **Factoid:** 52% of Commercial Drivers surveyed never buys diesel at the Service Areas

As a "commercial driver", approximately how many days in the past 12 months have you spent driving on New York State highways including the Thruway?

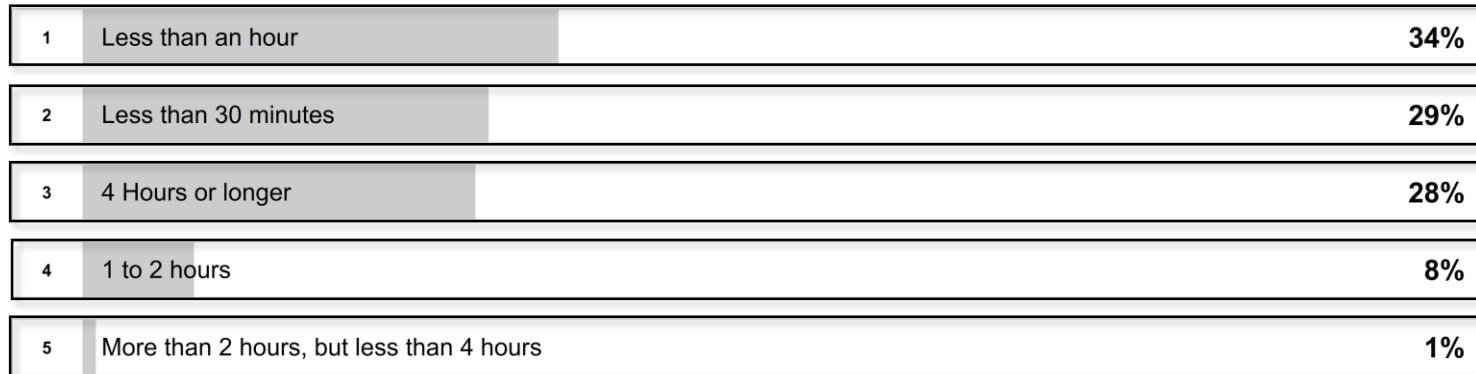


Is your usual vehicle equipped with a sleeper berth?

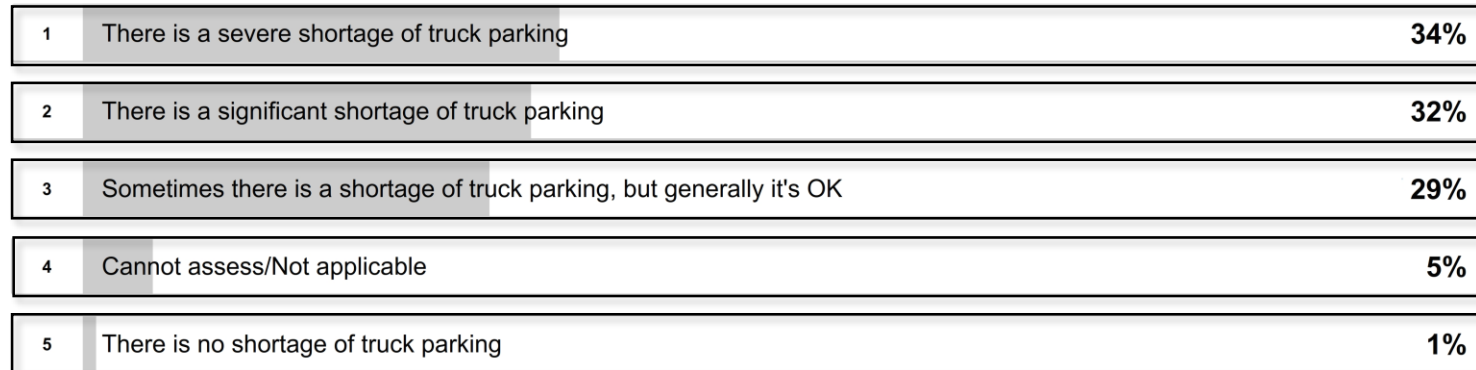


COMMERCIAL DRIVERS

When you stop at a Service Area, how long are you typically parked?

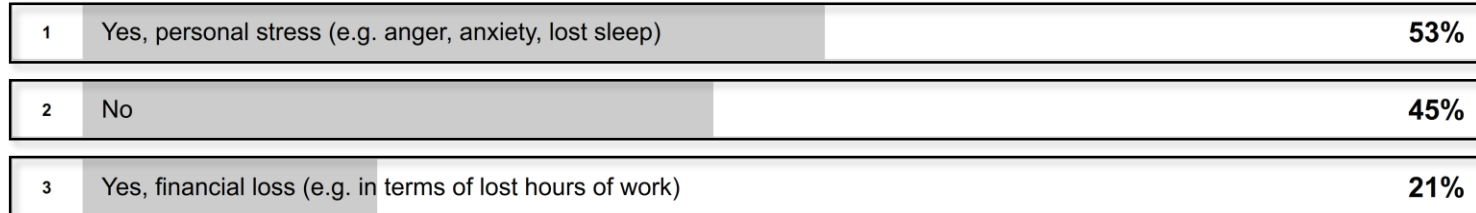


What is your overall assessment regarding the availability of safe and sufficient truck parking along the New York State Thruway?

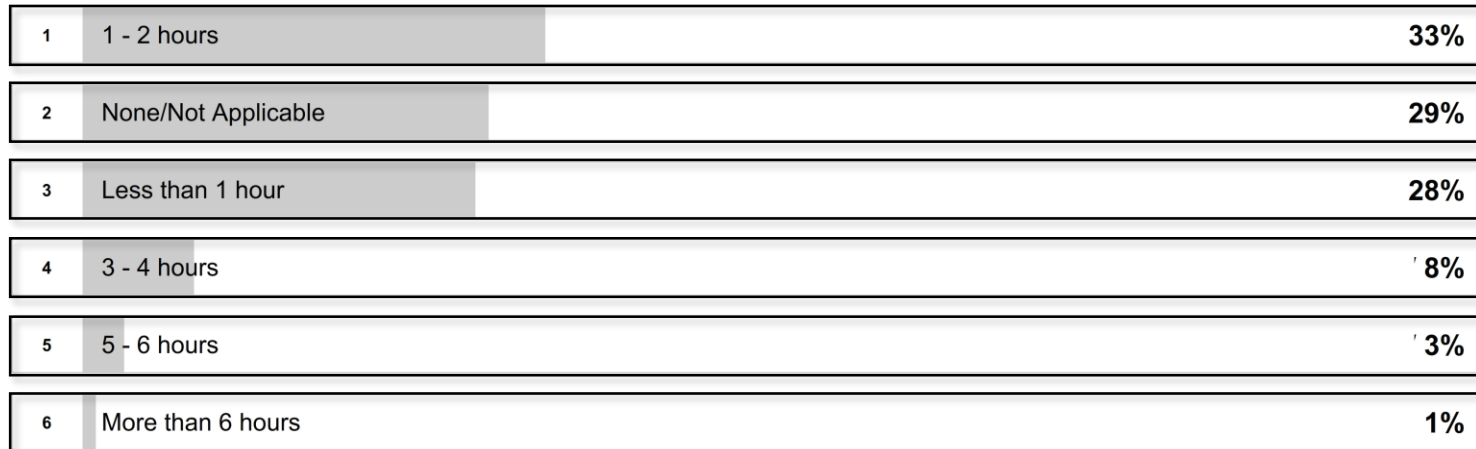


COMMERCIAL DRIVERS

Have you experienced financial loss or personal stress in the past 12 months due to a lack of truck parking along the New York State Thruway?

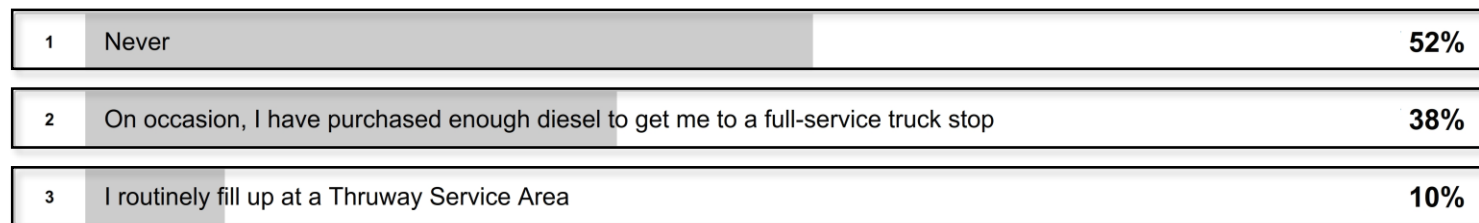


On average, how many hours of productive driving did you lose each time you had difficulty finding available parking?

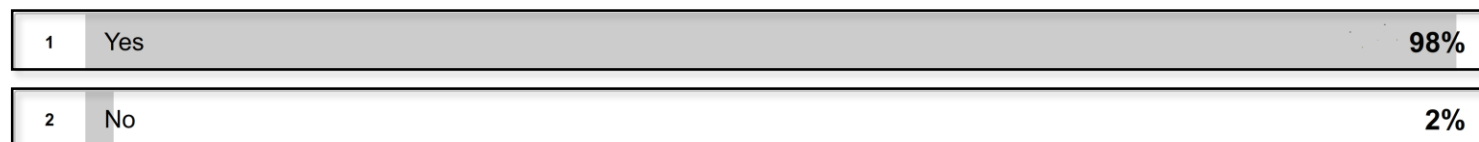


COMMERCIAL DRIVERS

Do you purchase fuel when you stop at a Service Area?



As a commercial driver, have you visited any of the New York State Thruway Services Areas (also known as Travel Plazas) in the past six months?



COMMERCIAL DRIVERS

What features and services/amenities would you like to see at the New York Thruway Service Areas?

1	Expanded truck parking area	80%
2	Access to showers	52%
3	Being able to park for 8 - 12 hours	47%
4	Access to a truckers' lounge	37%
5	Acceptance of fleet cards for fuel purchases	24%
6	More lighting	22%
7	A higher level of security/safety	18%
8	Self-service laundry facilities	15%
9	Budget hotel	10%
10	Electrical charging station	8%
11	Staging areas to conduct transshipment activities	7%
12	Other	6%

SUMMARY

- ❖ The General Perception: Service Areas are a Safe Place to Stop (All Customer Segments)
- ❖ Most Satisfied with Current Service Areas: **Occasional Thruway Users**
- ❖ Least Satisfied: **Commercial Drivers** (Shortage of Parking and Related Stress)
- ❖ Response to Design of Current Service Areas
 - Building Exteriors Gets the Highest Marks
 - General Dislike of the Interior Layout with Barely a Passing Grade for the Restrooms
 - Upgrade in Outdoor Amenities Desired by All Customer Segments Especially Leisure Travelers with Families
- ❖ Low Marks Across the Board for Authenticity and a Sense of Place
- ❖ Small Minority of Respondents Pushed Back on Pricing of Food & Beverage and Retail with Leisure Travelers the Most Vocal
- ❖ Top Wish List Items (All Customer Segments Aggregated)
 - Food Halls
 - Drive Thru Service
 - Car Washes
 - Take-Out Individual or Family-Style Meals
 - Sale of New York State Wine/Beer/Spirits for Home Use