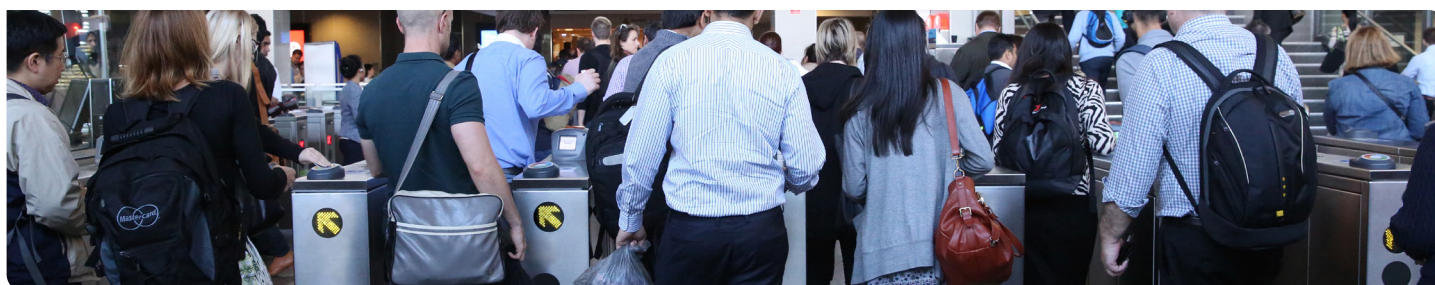


May 2016 Fare Compliance Survey Results



Key highlights

The May 2016 survey estimates fare compliance to be **93.6% across the public transport network:**

↓ **a decrease of 1.6 percentage points compared with the November 2015 estimate.**

Revenue loss as a result of non-compliance **for the six months to June 2016 is estimated to be \$54.2 million.**

Train fare compliance is estimated to be **92.9%**, down from 95.2% in November 2015: a decrease of **2.3 percentage points.**

Bus fare compliance is estimated to be **94.5%**, down from 95.1% in November 2015: a decrease of **0.6 percentage points.**

Ferry fare compliance is estimated to be **96.3%**, down from 96.9% in November 2015: a decrease of **0.6 percentage points.**

Light rail fare compliance is estimated to be **95.7%**, down from 96.1% in November 2015: a decrease of **0.4 percentage points.**

Survey background

The fare compliance survey is conducted twice yearly in May and November, and is designed to measure the incidence of non-compliance and associated revenue loss across the public transport network. This work identifies problem areas and helps the NSW Government develop strategies to improve both fare compliance and public transport cost recovery.

The May 2016 survey involved checking over 74,000 Opal cards and paper tickets (including Magnetic Stripe Tickets) on 5,900 services across train, bus, ferry and light rail modes.

Customers identified as not complying included those not having a ticket or not tapping on, those travelling on a concession ticket or concession Opal card without valid entitlement (concession misuse), and those travelling beyond the distance allowed by their ticket or Opal card (overriding).

Ticketing changes since November 2015 survey

On 1 January 2016, all paper tickets except single adult and concession tickets (trains, buses, ferries and light rail) and return adult and concession tickets (trains, ferries and light rail) were retired from sale. Tickets no longer available from 1 January 2016, included: pensioner excursion tickets, MyMulti weekly tickets, MyBus TravelTen tickets, and MyFerry TravelTen tickets.

Survey snapshot

Fare compliance by mode

Mode	May 2015	Nov 2015	May 2016	Change from Nov 2015
Train	94.6%	95.2%	92.9%	-2.3
Bus	95.0%	95.1%	94.5% ¹	-0.6
Ferry	97.4%	96.9%	96.3%	-0.6
Light Rail	95.7%	96.1%	95.7%	-0.4

¹ Includes outer metropolitan buses, surveyed for the first time in May 2016.

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Level 3 18 Lee Street Chippendale NSW 2008

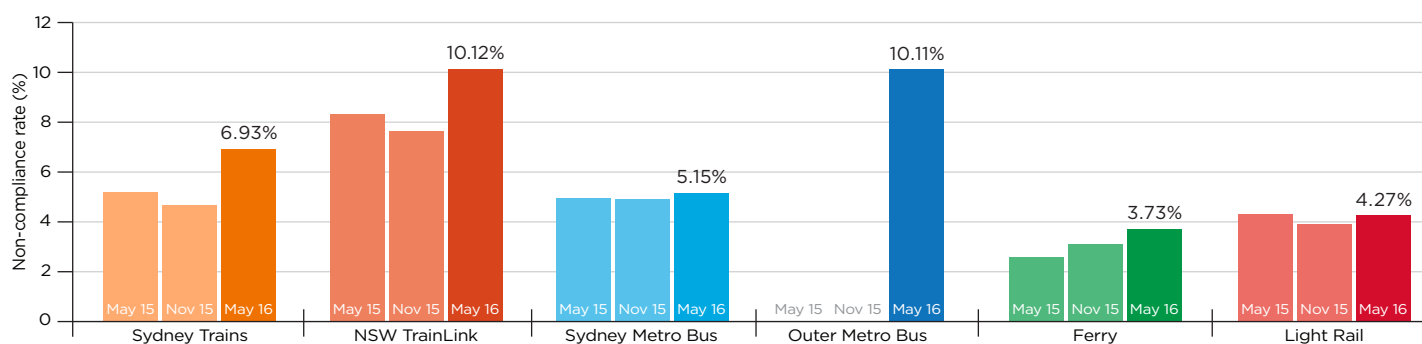
PO Box K659 Haymarket 1240

Email: tpa@transport.nsw.gov.au



**Transport
for NSW**

Non-compliance rate: May 2015 - May 2016



Non-compliance by day type

Mode	Weekday	Weekend
Train (total)	7.37%	5.67%
Sydney Trains	7.23%	5.24%
NSW TrainLink - Intercity	9.70%	12.39%
Bus (total)	5.57%	4.99%
Sydney Metro Buses	5.24%	4.66%
Outer Sydney Metro Buses	10.90%	10.01%
Sydney Ferries	4.24%	2.71%
Sydney Light Rail	4.48%	3.59%

Non-compliance by time of day (weekday)

Mode	AM peak	PM peak	Off peak
Train (total)	9.18%	7.76%	5.35%
Sydney Trains	9.22%	7.59%	5.07%
NSW TrainLink - Intercity	8.60%	10.32%	10.25%
Bus (total)	5.62%	6.87%	4.57%
Sydney Metro Buses	5.32%	6.23%	4.44%
Outer Sydney Metro Buses	9.74%	15.94%	6.23%
Sydney Ferries	4.26%	3.23%	4.95%
Sydney Light Rail	3.53%	4.58%	4.86%

Non-compliance and revenue loss by category

Revenue loss figures represent estimated revenue lost due to non-compliance for the six month period from January to June 2016.

Mode	Not having a ticket (%)	Not having a ticket (\$ '000)	Concession misuse (%)	Concession misuse (\$ '000)	Over riding (%)	Over riding (\$ '000)
Train (total)	5.97%	33,752	1.10%	4,030	0.05%	82
Sydney Trains	5.79%	29,476	1.08%	3,547	0.05%	71
NSW TrainLink - Intercity	8.68%	4,276	1.31%	483	0.13%	11
Bus (total)	4.61%	12,775	0.85%	1,733	0.03%	39
Sydney Metro Buses	4.47%	11,373	0.66%	1,234	0.03%	33
Outer Sydney Metro Buses	6.53%	1,402	3.50%	499	0.09%	6
Sydney Ferries	3.05%	1,177	0.63%	174	0.05%	5
Sydney Light Rail	3.75%	416	0.51%	30	0.02%	1

Estimated revenue loss

for the six months to June 2016

Mode	May 2016 (\$ '000) For the six months to June 2016
Train (total)	37,863
Bus (total)	14,547
Sydney Ferries	1,356
Sydney Light Rail	447
Total	54,214

Notes:

Customers identified as having no paper ticket or Opal card at all, were allocated to the Paper category.

Compliance and non-compliance percentages may not add to 100%; and minor discrepancies for totals are a result of rounding.

Opal card vs. paper ticket non-compliance

(Paper includes magnetic stripe tickets)

Mode	Opal	Paper	Non compliance rate (total)
Train (total)	3.77%	3.35%	7.12%
Sydney Trains	3.68%	3.24%	6.93%
NSW TrainLink - Intercity	5.16%	4.96%	10.12%
Bus (total)	3.35%	2.14%	5.49%
Sydney Metro Buses	3.27%	1.89%	5.15%
Outer Sydney Metro Buses	4.56%	5.55%	10.11%
Sydney Ferries	2.81%	0.91%	3.73%
Sydney Light Rail	1.94%	2.33%	4.27%

Fare compliance by mode

Sydney Trains

Sydney Trains Network Map – Fare compliance survey results



- Sydney Trains **fare compliance is estimated to be 93.1%, a decrease of 2.2 percentage points** compared with November 2015. Compliance on weekends improved by 1.6 percentage points, however compliance on weekdays decreased 2.9 percentage points. Decreases in compliance during the weekday AM peak and weekday PM peak were 6.4 percentage points and 2.9 percentage points respectively. Compliance during the weekday off-peak remained steady.

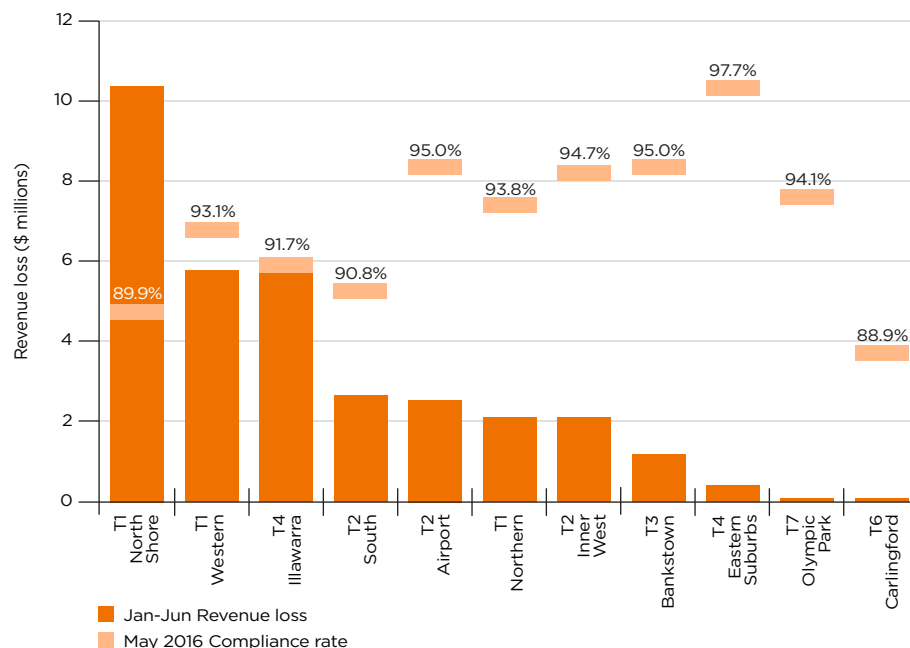
- Compliance is highest on the Eastern Suburbs line (97.7%) and lowest on the Carlingford line (88.9%).

- Compared with November 2015, the largest decreases in compliance were recorded on the South line and North Shore line (5.1 percentage points), with compliance on the South line decreasing from 95.9% to 90.8% and compliance on the North Shore line decreasing from 95.0% to 89.9%. Decreased compliance was also noted on the Illawarra line (4.1 percentage points, from 95.8% to 91.7%); the Carlingford line (4.1 percentage points, from 93.0% to 88.9%); and the Northern line (3.7 percentage points, from 97.5% to 93.8%).

- Estimated **revenue loss for the six months to June 2016 was \$33.1 million**, which accounts for 61.0% of the total estimated revenue loss across all modes.

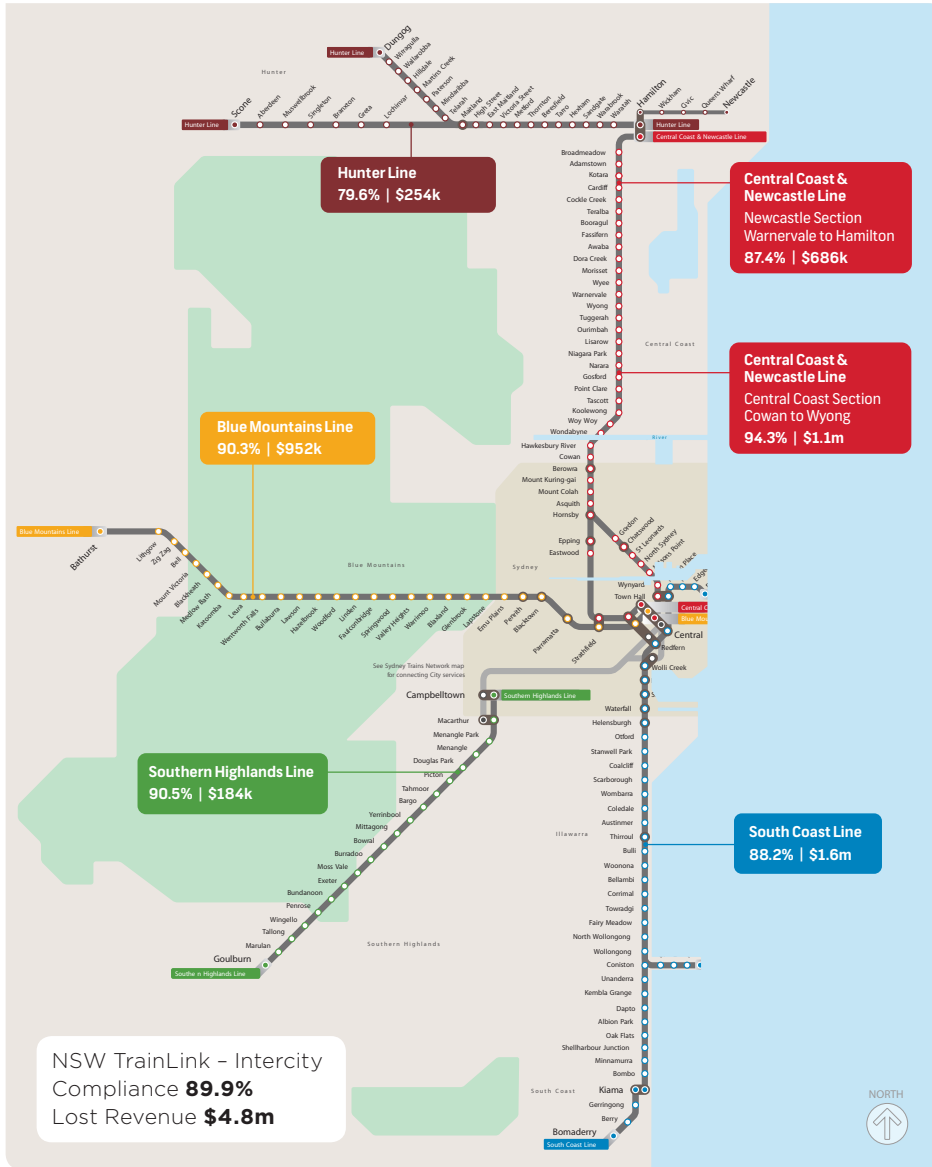
- Highest contributors to the Sydney Trains \$33.1 million estimated revenue loss were the North Shore line (31.4%), Western line (17.4%) and Illawarra line (17.3%).

Compliance rate and revenue loss for Sydney Trains



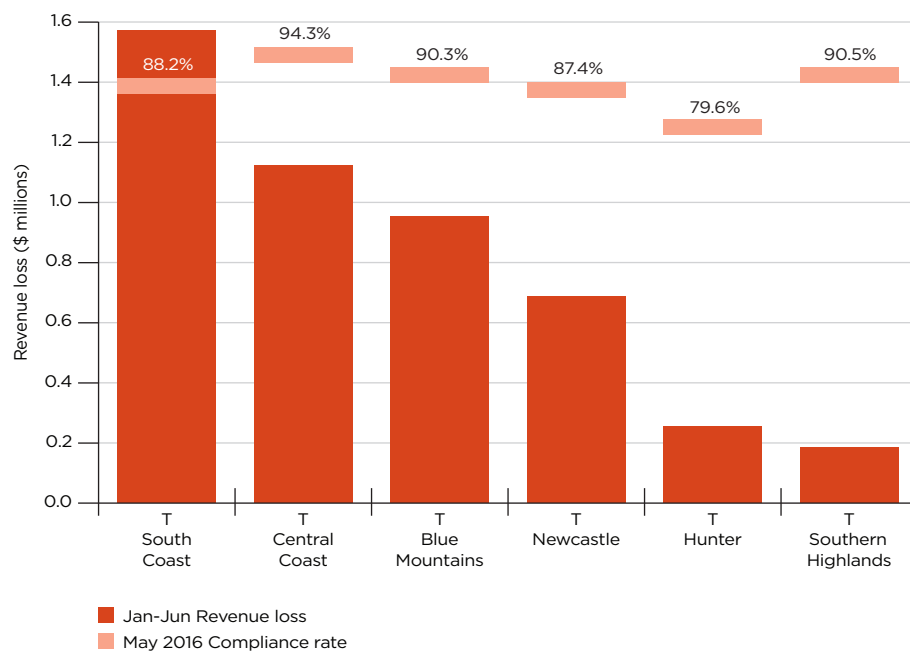
NSW TrainLink - Intercity

NSW TrainLink - Intercity Network Map - Fare compliance survey results



- NSW TrainLink - Intercity **fare compliance is estimated to be 89.9%, a decrease of 2.5 percentage points** compared with November 2015. Compliance on weekends decreased by 2.6 percentage points and weekday compliance decreased by 2.4 percentage points. A 4.6 percentage point decrease in compliance during the weekday AM peak was reported.
- Compliance is highest on the Central Coast line, with compliance estimated to be 94.3%, an improvement of 0.4 percentage points compared with November 2015. Compliance also improved on the Southern Highlands line (0.8 percentage points from 89.7% to 90.5%).
- The Hunter line continues to record the lowest compliance rate (79.6%) of all NSW TrainLink - Intercity lines.
- Compared with November 2015, the largest decrease in compliance was recorded on the Blue Mountains line (4.7 percentage points), with compliance decreasing from 95.0% to 90.3%. Decreased compliance was also noted on the Newcastle line (4.6 percentage points, from 92.0% to 87.4%); and the Hunter line (4.0 percentage points, from 83.6% to 79.6%).

Compliance rate and revenue loss for NSW Trains - Intercity



- Estimated **revenue loss for the six months to June 2016 was \$4.8 million**, which accounts for 8.8% of the total estimated revenue loss across all modes.
- Highest contributors to the NSW TrainLink - Intercity Trains \$4.8 million estimated revenue loss were the South Coast line (32.9%), Central Coast line (23.5%) and Blue Mountains line (20.0%).

Sydney Metropolitan Buses

Sydney Metropolitan Bus Network – Fare compliance survey results

Contract	Area	2016 Operator	Nov 2015 Compliance Rate	May 2016 Compliance Rate	Change from Nov 2015 *
1	Penrith, Blacktown, Richmond	Busways	96.1%	90.3%	-5.7
2	Liverpool, Ingleburn, Campbelltown	Interline	98.5%	94.9%	-3.6
3	Parramatta, Fairfield, Liverpool	Transit Systems	95.6%	91.3%	-4.3
4	Hills District	Hillsbus	94.8%	96.7%	+1.9
5	Bankstown, Hurstville, Roselands	Punchbowl Bus Co.	97.1%	93.3%	-3.8
6	Inner West	Sydney Buses	95.3%	96.4%	+1.1
7	North Sydney, Epping, Parramatta	Sydney Buses	96.2%	94.0%	-2.2
8	Northern Beaches	Sydney Buses	94.9%	94.0%	-0.9
9	Eastern Suburbs	Sydney Buses	93.9%	95.8%	+1.9
10	Hurstville, Sutherland, Cronulla	Transdev NSW	96.2%	90.7%	-5.5
12	Chatswood, Hornsby	Transdev NSW	96.8%	95.8%	-1.0
13	Parramatta, Liverpool, Bankstown	Transdev NSW	95.0%	94.0%	-1.0
14	Frenchs Forest, St Ives, Hornsby	Forest Coach Lines	96.7%	95.4%	-1.3
15	Campbelltown, Camden, Macarthur	Busabout	97.6%	93.7%	-4.0

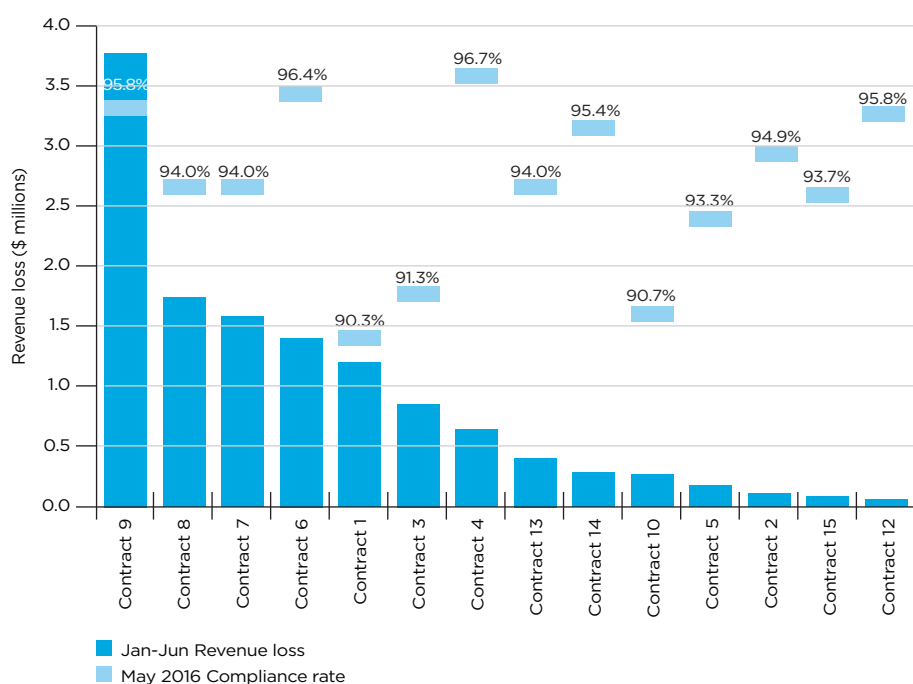
Due to rounding, the reported change in compliance rate may differ slightly from the difference between reported November 2015 and May 2016 compliance rates.

- Sydney Metropolitan Bus **fare compliance is estimated to be 94.9%**, steady compared to 95.1% in November 2015. Compliance across weekdays and weekends was steady compared to November 2015, with only the weekday PM peak showing a notable decrease in compliance of 2.4 percentage points.
- Contract 4** recorded the **highest compliance rate (96.7%)**, an **improvement of 1.9 percentage points** compared with November 2015.

- Contracts 4 and 9** recorded the largest increases in compliance, each **improving by 1.9 percentage points**.

- Contract 1** recorded the **lowest compliance rate (90.3%)**, a decrease of 5.7 percentage points compared with November 2015. Decreased compliance was also noted on Contract 10 (5.5 percentage points, from 96.2% to 90.7%); Contract 3 (4.3 percentage points, from 95.6% to 91.3%); and Contract 15 (4.0 percentage points, from 97.6% to 93.7%).

Compliance rate and revenue loss for Sydney Metropolitan Bus Network



- Estimated revenue loss for the six months to June 2016 was \$12.6 million**, which accounts for 23.3% of the total estimated revenue loss across all modes.

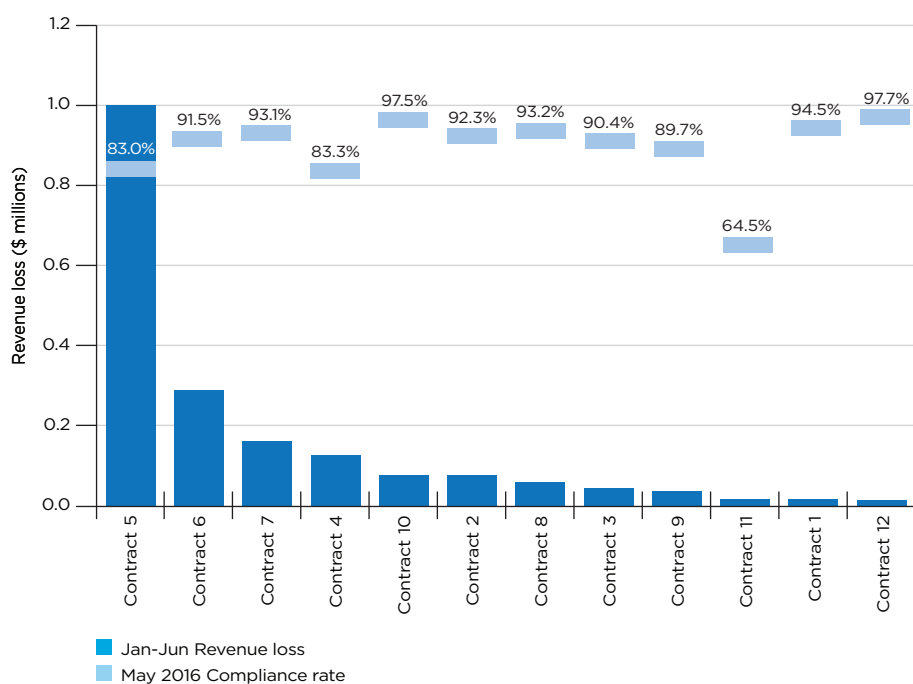
- Highest contributors to the Sydney Metropolitan Buses \$12.6 million estimated revenue loss were Contract 9 (29.9%), Contract 8 (13.8%), Contract 7 (12.5%) and Contract 6 (11.1%).

Outer Sydney Metropolitan Buses

Outer Sydney Metropolitan Bus Network – Fare compliance survey results

Contract	Area	2016 Operator	May 2016 Compliance Rate
1	Cessnock, Maitland, Newcastle	Rover Coaches	94.5%
2	Maitland, Raymond Terrace	Hunter Valley Buses	92.3%
3	Port Stephens, Newcastle	Port Stephens Coaches	90.4%
4	Maryland, Edgeworth, Toronto	Hunter Valley Buses	83.3%
5	Newcastle, Lake Macquarie	Newcastle Buses & Ferries	83.0%
6	Gosford, Wyong	Busways	91.5%
7	Gosford, Wyong	Red Bus Services	93.1%
8	Katoomba, Springwood, Penrith	Blue Mountains Transit	93.2%
9	Wollongong, Stanwell Park and Helensburgh	Premier Charters	89.7%
10	Kiama, Dapto and Wollongong	Premier Motor Service	97.5%
11	Wyong	Coastal Liner	64.5%
12	Wollongong, Corrimal, Thirroul	Seapost	97.7%

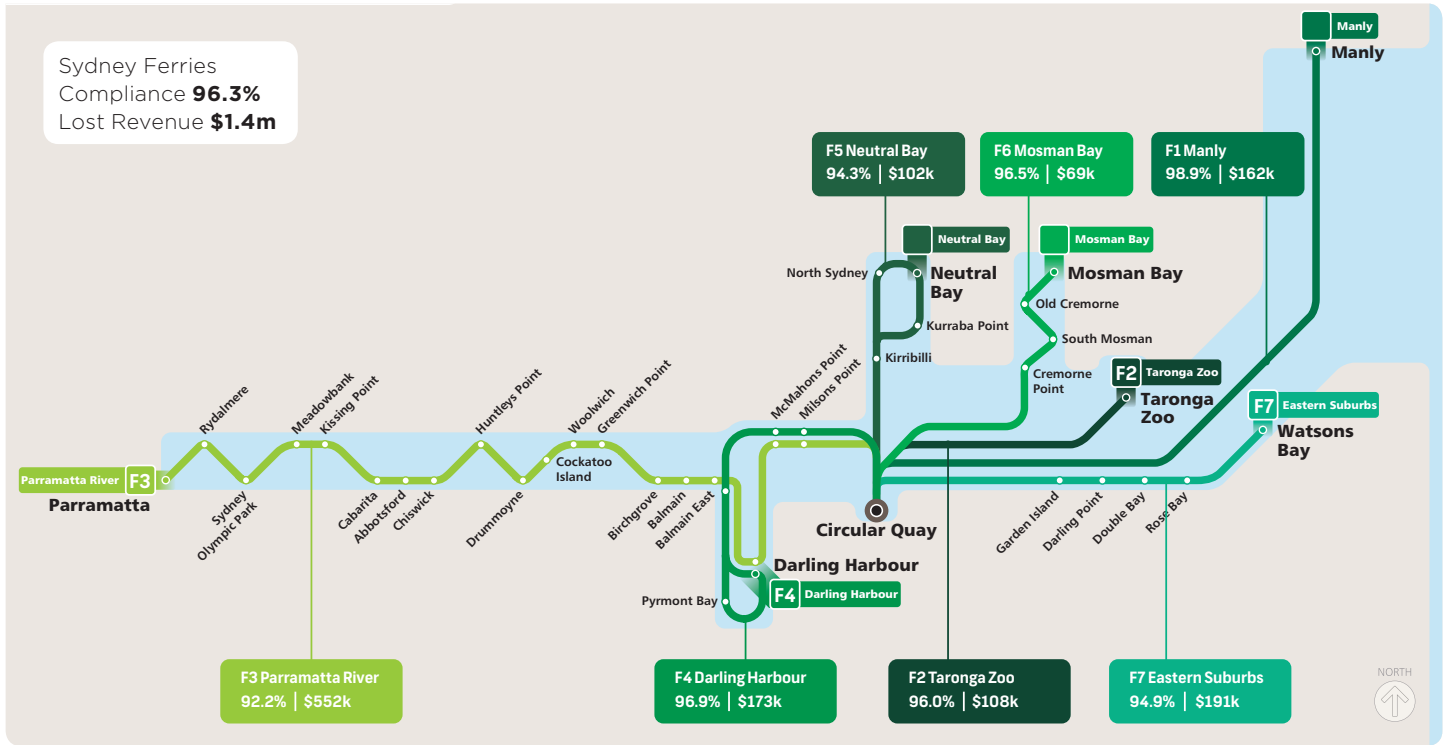
Compliance rate and revenue loss for Outer Sydney Metropolitan Bus Network



- Outer Sydney Metropolitan Buses were surveyed for the first time in May 2016; **fare compliance is estimated to be 89.9%**.
- Similar compliance rates were noted for weekdays (89.1%) and weekends (90.0%). Weekday compliance was lowest during the PM peak (84.1%) and the highest during the off-peak (93.8%).
- The **highest compliance rates** were recorded for **Contract 12** (97.7%) and **Contract 10** (97.5%).
- The **lowest compliance rate** was recorded for **Contract 11** (64.5%), largely driven by 'no ticket' non-compliance.
- Estimated **revenue loss for the six months to June 2016 was \$1.9 million**, which accounts for 3.5% of the total estimated revenue loss across all modes.
- Highest contributors to the Outer Sydney Metropolitan Buses \$1.9 million estimated revenue loss were Contract 5 (52.3%), Contract 6 (15.0%) and Contract 7 (8.4%).

Sydney Ferries

Sydney Ferries Network Map – Fare compliance survey results

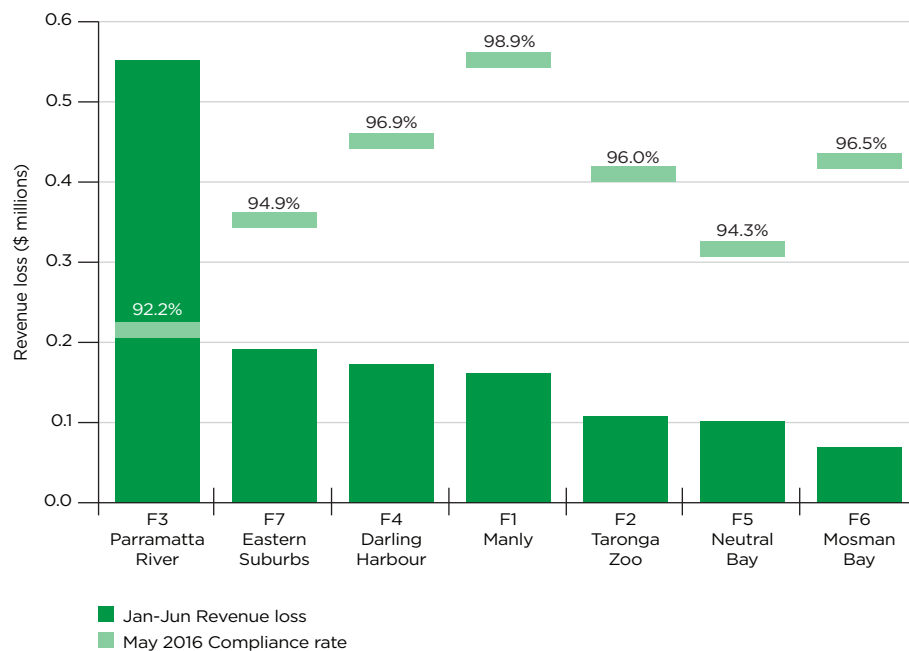


- Ferryfare compliance is estimated to be **96.3%, a decrease of 0.6 percentage points** compared with November 2015. Compliance during the weekday PM peak and on weekends remained steady, however there was a decrease in compliance during the weekday off peak (2.0 percentage points) and weekday AM peak (1.0 percentage points).
- Compliance is **highest on the Manly service** (98.9%) and **lowest on the Parramatta River service** (92.2%).

- The **Mosman Bay service** recorded the largest improvement in compliance, up by 3.2 percentage points compared with November 2015. Improved compliance was also noted on the Darling Harbour service (1.1 percentage points).

- The **Parramatta River service** recorded the largest decrease in compliance, **down by 4.6 percentage points** compared with November 2015. Decreased compliance was also noted on the Neutral Bay service (2.1 percentage points) and Eastern Suburbs service (1.5 percentage points)

Compliance rate and revenue loss for Sydney Ferries



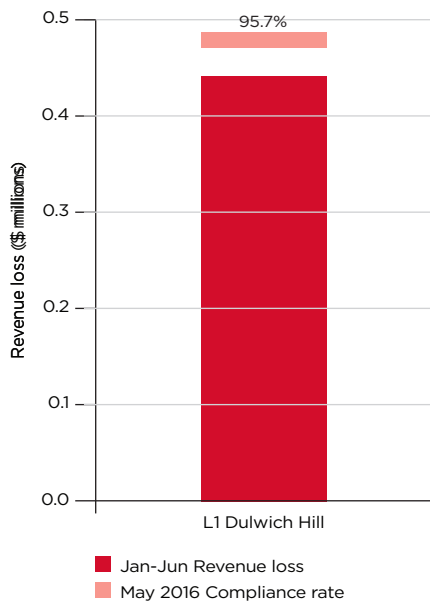
- Estimated **revenue loss for the six months to June 2016 was \$1.4 million**, which accounts for 2.5% of the total estimated revenue loss across all modes.
- Highest contributors to the Sydney Ferries \$1.4 million estimated revenue loss were the Parramatta River service (40.7%), Eastern Suburbs service (14.1%), Darling Harbour service (12.8%) and Manly service (11.9%).

Sydney Light Rail

Sydney Light Rail Network Map – Fare compliance survey results



Compliance rate and revenue loss for Sydney Light Rail



- Light rail **fare compliance is estimated to be 95.7%, down 0.4 percentage points** compared with November 2015.
- Compliance on weekends improved by 3.5 percentage points, however weekday compliance decreased by 1.5 percentage points, driven by decreased compliance during the weekday AM peak (2.3 percentage points) and weekday PM peak (2.4 percentage points). Compliance during the weekday off peak remained steady.
- Estimated **revenue loss for the six months to June 2016 was \$447,000**, which accounts for 0.8% of the total estimated revenue loss across all modes.



Summary of compliance and revenue loss for all modes

Mode	May 2015 Compliance (%)	Nov 2015 Compliance (%)	May 2016 Compliance (%)	May 2016 Revenue Loss (\$ 000) For the six months to June 2016
Sydney Trains				
T1 - North Shore	95.3%	95.0%	89.9%	10,379
T1 - Northern	96.2%	97.5%	93.8%	2,115
T1 - Western	95.2%	94.1%	93.1%	5,766
T2 - Airport	94.6%	95.0%	95.0%	2,547
T2 - Inner West	95.7%	95.8%	94.7%	2,114
T2 - South	93.5%	95.9%	90.8%	2,659
T3 - Bankstown	90.9%	95.1%	95.0%	1,188
T4 - Eastern Suburbs	96.8%	95.9%	97.7%	419
T4 - Illawarra	93.9%	95.8%	91.7%	5,728
T6 - Carlingford	88.6%	93.0%	88.9%	81
T7 - Olympic Park	93.5%	95.9%	94.1%	97
Total Sydney Trains	94.8%	95.3%	93.1%	33,093
NSW TrainLink - Intercity				
T - Blue Mountains	92.7%	95.0%	90.3%	952
T - Central Coast	94.1%	93.9%	94.3%	1,123
T - Hunter	77.5%	83.6%	79.6%	254
T - Newcastle	91.8%	92.0%	87.4%	686
T - South Coast	89.7%	89.8%	88.2%	1,571
T - Southern Highlands	94.7%	89.7%	90.5%	184
Total NSW TrainLink - Intercity	91.7%	92.4%	89.9%	4,770
TOTAL TRAIN	94.6%	95.2%	92.9%	37,863



Summary of compliance and revenue loss for all modes

Mode	May 2015 Compliance (%)	Nov 2015 Compliance (%)	May 2016 Compliance (%)	May 2016 Revenue Loss (\$ 000) For the six months to June 2016
Sydney Metropolitan Buses				
1 - Penrith, Blacktown, Richmond	97.4%	96.1%	90.3%	1,202
2 - Liverpool, Ingleburn, Campbelltown	97.3%	98.5%	94.9%	113
3 - Parramatta, Fairfield, Liverpool	93.9%	95.6%	91.3%	858
4 - Hills District	95.7%	94.8%	96.7%	646
5 - Bankstown, Hurstville, Roselands	96.3%	97.1%	93.3%	181
6 - Inner West	95.6%	95.3%	96.4%	1,409
7 - North Sydney, Epping, Parramatta	96.7%	96.2%	94.0%	1,585
8 - Northern Beaches	93.3%	94.9%	94.0%	1,743
9 - Eastern Suburbs	93.3%	93.9%	95.8%	3,778
10 - Hurstville, Sutherland, Cronulla	96.6%	96.2%	90.7%	273
12 - Chatswood, Hornsby	98.8%	96.8%	95.8%	63
13 - Parramatta, Liverpool, Bankstown	97.4%	95.0%	94.0%	411
14 - Frenchs Forest, St Ives, Hornsby	95.7%	96.7%	95.4%	289
15 - Campbelltown, Camden, Macarthur	98.7%	97.6%	93.7%	91
TOTAL SYDNEY METROPOLITAN BUSES	95.0%	95.1%	94.9%	12,640
Outer Sydney Metropolitan Buses				
1 - Cessnock, Maitland, Newcastle			94.5%	16
2 - Maitland, Raymond Terrace			92.3%	75
3 - Port Stephens, Newcastle			90.4%	44
4 - Maryland, Edgeworth, Toronto			83.3%	125
5 - Newcastle, Lake Macquarie			83.0%	998
6 - Gosford, Wyong			91.5%	287
7 - Gosford, Wyong			93.1%	161
8 - Katoomba, Springwood, Penrith			93.2%	59
9 - Wollongong, Stanwell Park and Helensburgh			89.7%	37
10 - Kiama, Dapto and Wollongong			97.5%	76
11 - Wyong			64.5%	17
12 - Wollongong, Corrimal, Thirroul			97.7%	13
TOTAL OUTER SYDNEY METROPOLITAN BUSES			89.9%	1,907
TOTAL BUS			94.5%	14,547
Sydney Ferries				
F1 - Manly	98.4%	98.7%	98.9%	162
F2 - Taronga Zoo	96.3%	96.6%	96.0%	108
F3 - Parramatta River	96.7%	96.8%	92.2%	552
F4 - Darling Harbour	97.5%	95.8%	96.9%	173
F5 - Neutral Bay	96.9%	96.4%	94.3%	102
F6 - Mosman Bay	94.2%	93.3%	96.5%	69
F7 - Eastern Suburbs	97.2%	96.4%	94.9%	191
TOTAL FERRY	97.4%	96.9%	96.3%	1,356
Sydney Light Rail				
TOTAL LIGHT RAIL	95.7%	96.1%	95.7%	447
TOTAL ALL MODES	94.8%	95.2%	93.6%	54,214