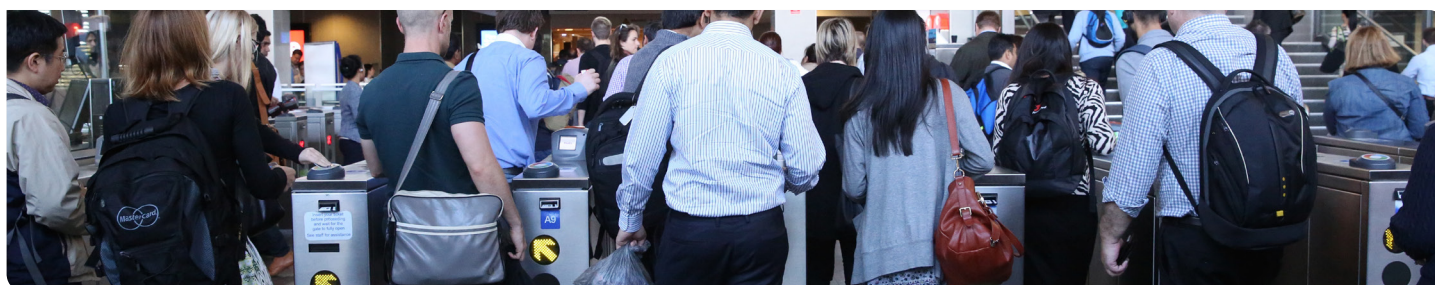# November 2015
Fare Compliance Survey Results

Key highlights

The November 2015 fare compliance survey estimates fare compliance to be **95.2% across the public transport network:**

⬆ **an improvement of 0.4 percentage points compared with the May 2015 estimate.**

Revenue loss as a result of non-compliance **for the six**

$ **months to December 2015 is estimated to be $35.0 million**, **Train contributes 69.4%, bus 27.6%, ferry 2.0% and light rail 1.0%.** Estimated revenue loss for the six months to June 2015 was $36.2 million.

Train fare compliance is estimated to be **95.2%**, up from 94.6% in May 2015:

⬆ an improvement of **0.6 percentage points.**

Bus fare compliance is estimated to be **95.1%**, steady in comparison to **95.0% in May 2015.**

Ferry fare compliance is estimated to be **96.9%**, down from 97.4% in May 2015:

⬇ a decrease of **0.5 percentage points.**

Light rail fare compliance is estimated to be **96.1%**, up from 95.7% in May 2015:

⬆ an improvement of **0.4 percentage points.**

Survey background

- In November 2012, Transport for NSW commissioned the first fare compliance survey since the establishment of the agency. The survey was repeated in November 2014, May 2015 and November 2015.

- The surveys are 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 November 2015 survey involved checking over 66,000 Opal cards and paper tickets (including Magnetic Stripe Tickets) across trains, buses, ferries and light rail.

- Customers identified as not complying included those not having a ticket, those travelling on a concession ticket without valid entitlement (concession misuse), and those travelling beyond the authority of their ticket (overriding).

Survey snapshot

Fare compliance by mode

Mode	Nov 2012	Nov 2014	May 2015	Nov 2015	Change from May 2015
Train	91.7%	93.8%	94.6%	**95.2%**	**+0.6**
Sydney Metro Buses	84.7%	– [1]	95.0%	**95.1%**	**+0.1**
Sydney Ferries	95.1%	97.1%	97.4%	**96.9%**	**-0.5**
Sydney Light Rail	– [2]	93.5%	95.7%	**96.1%**	**+0.4**

1. Buses were not surveyed in November 2014 due to Opal rollout on buses occurring at the time of the survey.

2. Light rail was not surveyed in November 2012 as TfNSW began its contract with the Light Rail operator in July 2013.

bts.nsw.gov.au

Level 3 18 Lee Street Chippendale NSW 2008

PO Box K659 Haymarket 1240

Email: tpa@transport.nsw.gov.au

NSW GOVERNMENT | **Transport for NSW**

Non-compliance by time of day (weekday)

Mode	AM peak	PM peak	Off peak
Train (total)	2.9%	5.0%	5.5%
Sydney Trains	2.8%	4.7%	5.3%
NSW Trains – Intercity	4.0%	9.5%	8.6%
Sydney Metro Buses	5.7%	3.8%	5.6%
Sydney Ferries	3.2%	2.9%	2.9%
Sydney Light Rail	1.3%	2.2%	4.2%

Non-compliance by day type

Mode	Weekday	Weekend
Train (total)	4.5%	7.0%
Sydney Trains	4.3%	6.9%
NSW Trains – Intercity	7.3%	9.8%
Sydney Metro Buses	5.1%	4.0%
Sydney Ferries	3.0%	3.3%
Sydney Light Rail	3.0%	7.1%

Non-compliance by category

Mode	Not having a ticket	Over riding	Concession misuse
Train (total)	3.0%	0.1%	1.8%
Sydney Trains	2.8%	0.1%	1.8%
NSW Trains – Intercity	5.2%	0.2%	2.3%
Sydney Metro Buses	2.7%	0.2%	2.0%
Sydney Ferries	2.4%	0.0%	0.7%
Sydney Light Rail	2.8%	0.1%	1.0%

Opal card vs. paper ticket (including magnetic stripe ticket) non-compliance

Mode	Opal	Paper[1]	Non compliance rate (total)[2]
Train (total)	2.0%	2.9%	4.9%
Sydney Trains	2.0%	2.7%	4.7%
NSW Trains – Intercity	2.5%	5.2%	7.6%
Sydney Metro Buses	2.0%	2.9%	4.9%
Sydney Ferries	1.6%	1.6%	3.1%
Sydney Light Rail	2.2%	1.7%	3.9%

1 Customers identified as having no ticket at all were allocated to the Paper category.

2 As percentages are rounded, the total non-compliance rate may not equal the sum of the Opal and paper ticket non-compliance rates.

Non-compliance revenue loss by category

for the six months to December 2015

Mode	Not having a ticket ($ '000)	Over riding ($ '000)	Concession misuse ($ '000)
Train (total)	16,133	164	7,982
Sydney Trains	13,803	124	7,042
NSW Trains – Intercity	2,330	40	940
Sydney Metro Buses	6,607	199	2,855
Sydney Ferries	547	0	159
Sydney Light Rail	279	4	62

Estimated revenue loss*

Mode	May 2015 ($ '000) For the six months to June 2015	% of total estimated revenue loss	Nov 2015 ($ '000) For the six months to December 2015	% of total estimated revenue loss
Train (total)	25,267	69.8%	24,279	69.4%
Sydney Metro Buses	9,915	27.4%	9,662	27.6%
Sydney Ferries	675	1.9%	707	2.0%
Sydney Light Rail	318	0.9%	345	1.0%
Total	**36,175**	**100.0%**	**34,992**	**100.0%**

* Revenue loss figures shown above are for two consecutive six-monthly periods: January to June 2015 and July to December 2015.

* As figures are rounded, reported totals may differ slightly from the sum of all modes.

General notes:

• The November 2015 revenue loss estimate is for the six months from July to December 2015, taking into account average fares and patronage estimates for this period.

• The May 2015 revenue loss estimate is for the six months from January to June 2015, taking into account average fares and patronage estimates for this period.

• Compliance and non-compliance percentages may not add to 100% due to rounding.

• Minor discrepancies for totals are a result of rounding.
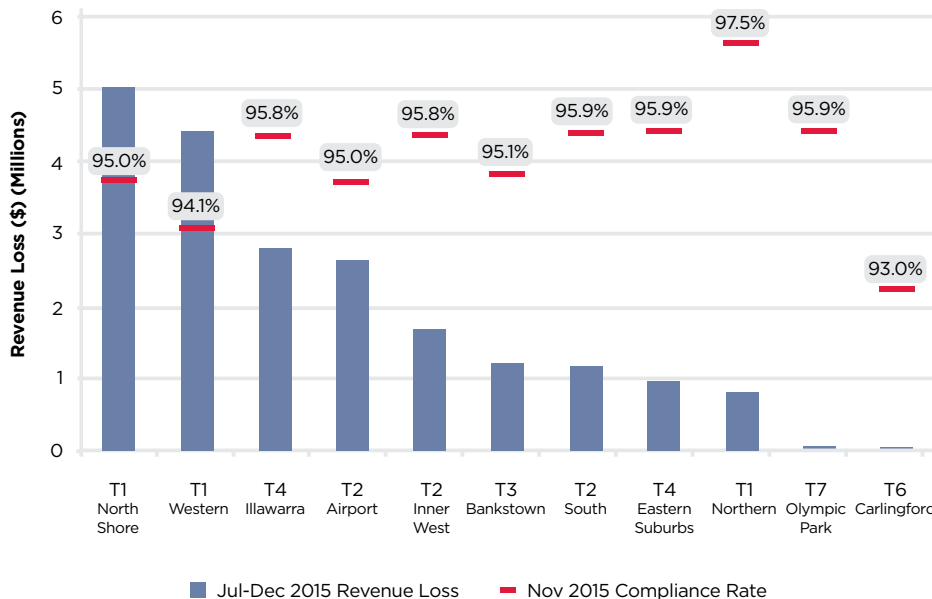
Fare compliance by mode

Sydney Trains

Sydney Trains Network Map – Fare compliance survey results

Map labels:

- **T6 Carlingford Line** 93.0% | $50k
- **T1 North Shore Line** 95.0% | $5.0m
- **T1 Northern Line** 97.5% | $836k
- **T1 Western Line** 94.1% | $4.4m
- **T2 Inner West Line** 95.8% | $1.7m
- **T2 South Line & SWRL** 95.9% | $1.2m — Merrylands to Leppington
- **T7 Olympic Park Line** 95.9% | $73k
- **T4 Eastern Suburbs Line** 95.9% | $979k
- **T4 Illawarra Line** 95.8% | $2.8m
- **T2 Airport Line** 95.0% | $2.6m — City to Macarthur via Airport
- **T3 Bankstown Line** 95.1% | $1.2m

Sydney Trains Compliance **95.3%** Lost Revenue **$21.0m**

NORTH

Compliance rate and revenue loss for Sydney Trains

Chart legend: ■ Jul-Dec 2015 Revenue Loss — Nov 2015 Compliance Rate

Bars (Revenue Loss, Millions) and compliance rates:
- T1 North Shore: 95.0%
- T1 Western: 94.1%
- T4 Illawarra: 95.8%
- T2 Airport: 95.0%
- T2 Inner West: 95.8%
- T3 Bankstown: 95.1%
- T2 South: 95.9%
- T4 Eastern Suburbs: 95.9%
- T1 Northern: 97.5%
- T7 Olympic Park: 95.9%
- T6 Carlingford: 93.0%

- Sydney Trains **fare compliance is estimated to be 95.3%, an improvement of 0.5 percentage points** compared with May 2015. Compliance on weekends improved (0.3 percentage points), as did compliance for weekdays across all three weekday periods: AM peak (0.9 percentage points), PM peak (0.2 percentage points) and off peak (0.6 percentage points).

- Compliance is highest on the Northern line (97.5%) and lowest on the Carlingford line (93.0%).

- Compared with May 2015, fare compliance has improved on 8 of the 11 lines, with decreases in fare compliance on the Western (1.1 percentage points), Eastern Suburbs (0.9 percentage points) and North Shore (0.3 percentage points) lines.

- Compared with May 2015, the Carlingford line had the largest improvement in compliance (4.4 percentage points, from 88.6% to 93.0%). Other notable improvements were:
  - Bankstown line (4.2 percentage points, from 90.9% to 95.1%);
  - Olympic Park line (2.4 percentage points, from 93.5% to 95.9%); and
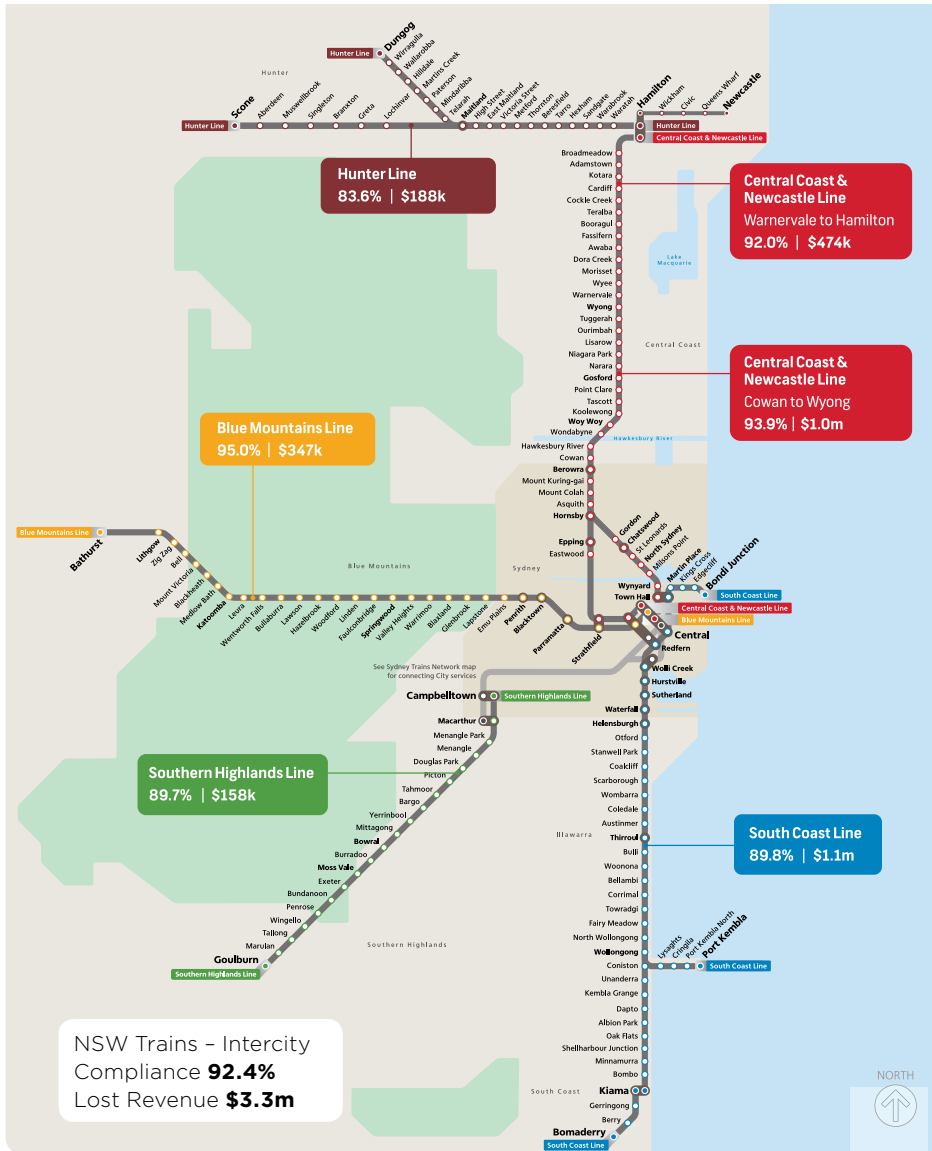 - South line (2.4 percentage points, from 93.5% to 95.9%).

- Estimated **revenue loss for the six months to December 2015 was $21.0 million**, which accounts for 59.9% of the total estimated revenue loss across all modes. Estimated revenue loss for the six months to June 2015 was $21.8 million.

- Highest contributors to estimated revenue loss were the North Shore line (23.9%), Western line (21.1%), Illawarra line (13.4%) and Airport to Macarthur line (12.6%).
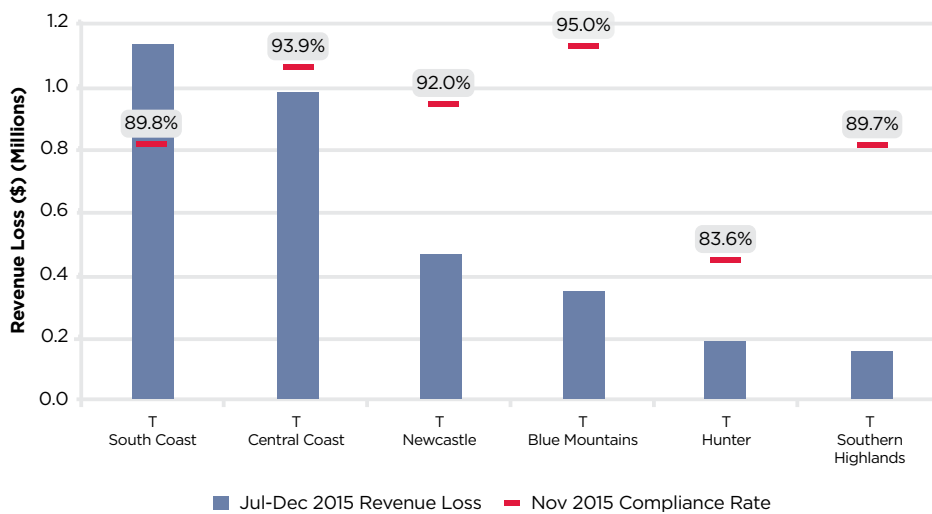
NSW Trains – Intercity

NSW Trains – Intercity Network Map – Fare compliance survey results

Hunter Line
83.6% | $188k

Central Coast & Newcastle Line
Warnervale to Hamilton
92.0% | $474k

Central Coast & Newcastle Line
Cowan to Wyong
93.9% | $1.0m

Blue Mountains Line
95.0% | $347k

Southern Highlands Line
89.7% | $158k

South Coast Line
89.8% | $1.1m

NSW Trains – Intercity
Compliance **92.4%**
Lost Revenue **$3.3m**

NORTH

- NSW Trains – Intercity **fare compliance is estimated to be 92.4%, an improvement of 0.7 percentage points** compared with May 2015. Improvements in compliance during the weekday AM peak (2.8 percentage points) and weekday off peak (1.1 percentage points) were noted, however there was a decrease in compliance during the weekday PM peak (0.7 percentage points) and on weekends (1.7 percentage points).

- Compliance is highest on the Blue Mountains line, with compliance estimated to be 95.0%, an improvement of 2.3 percentage points compared with May 2015.

- Compared with May 2015, compliance on the Hunter line improved by 6.1 percentage points, however the Hunter line continues to record the lowest compliance rate (83.6%) of all NSW Trains – Intercity lines.

- Estimated **revenue loss for the six months to December 2015 was $3.3 million**, which accounts for 9.5% of the total estimated revenue loss across all modes. Estimated revenue loss for the six months to June 2015 was $3.4 million.

- Highest contributors to estimated revenue loss were the South Coast line (34.4%), Central Coast line (30.3%) and Newcastle line (14.3%).

Compliance rate and revenue loss for NSW Trains – Intercity

Revenue Loss ($) (Millions)

	T South Coast	T Central Coast	T Newcastle	T Blue Mountains	T Hunter	T Southern Highlands
Compliance	89.8%	93.9%	92.0%	95.0%	83.6%	89.7%

■ Jul-Dec 2015 Revenue Loss   ▬ Nov 2015 Compliance Rate

Sydney Metropolitan Buses

Sydney Metropolitan Buses Network – Fare compliance survey results

Contract	Area	2015 Operator	May 2015 Compliance Rate	Nov 2015 Compliance Rate	Change from May 2015*
1	Penrith, Blacktown, Richmond	Busways	97.4%	96.1%	**-1.3**
2	Liverpool, Ingleburn, Campbelltown	Interline	97.3%	98.5%	**+1.2**
3	Parramatta, Fairfield, Liverpool	Transit Systems	93.9%	95.6%	**+1.6**
4	Hills District	Hillsbus	95.7%	94.8%	**-0.9**
5	Bankstown, Hurstville, Roselands	Punchbowl Bus Co.	96.3%	97.1%	**+0.8**
6	Inner West	Sydney Buses	95.6%	95.3%	**-0.3**
7	North Sydney, Epping, Parramatta	Sydney Buses	96.7%	96.2%	**-0.5**
8	Northern Beaches	Sydney Buses	93.3%	94.9%	**+1.6**
9	Eastern Suburbs	Sydney Buses	93.3%	93.9%	**+0.5**
10	Hurstville, Sutherland, Cronulla	Transdev NSW	96.6%	96.2%	**-0.4**
12	Chatswood, Hornsby	Transdev NSW	98.8%	96.8%	**-2.0**
13	Parramatta, Liverpool, Bankstown	Transdev NSW	97.4%	95.0%	**-2.5**
14	Frenchs Forest, St Ives, Hornsby	Forest Coachlines	95.7%	96.7%	**+1.1**
15	Campbelltown, Camden, Macarthur	Busabout	98.7%	97.6%	**-1.1**

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

- Bus **fare compliance is estimated to be 95.1%,** steady compared to 95.0% in May 2015. Compliance on weekends improved by 1.5 percentage points, however a decrease in compliance during the weekday AM peak (2.2 percentage points) resulted in an overall decrease in compliance on weekdays of 0.2 percentage points. There was improved compliance during the weekday PM peak and off peak (0.7 percentage points each) compared with May 2015.

Compliance rate and revenue loss for Sydney Metropolitan Bus Service Contracts (SMBSC)

Jul-Dec 2015 Revenue Loss — **Nov 2015 Compliance Rate**

- **Contract 2** recorded the **highest compliance rate** (98.5%), an improvement of 1.2 percentage points compared with May 2015.

- **Contracts 3 and 8** recorded the largest increases in compliance, each **improving by 1.6 percentage points**, while Contract 13 recorded the largest decrease in compliance (2.5 percentage points) compared with May 2015.
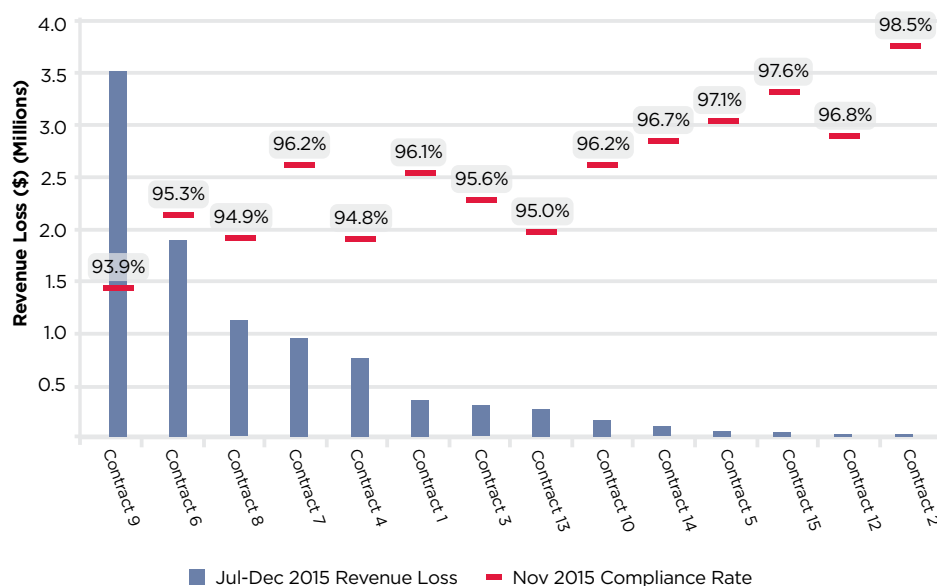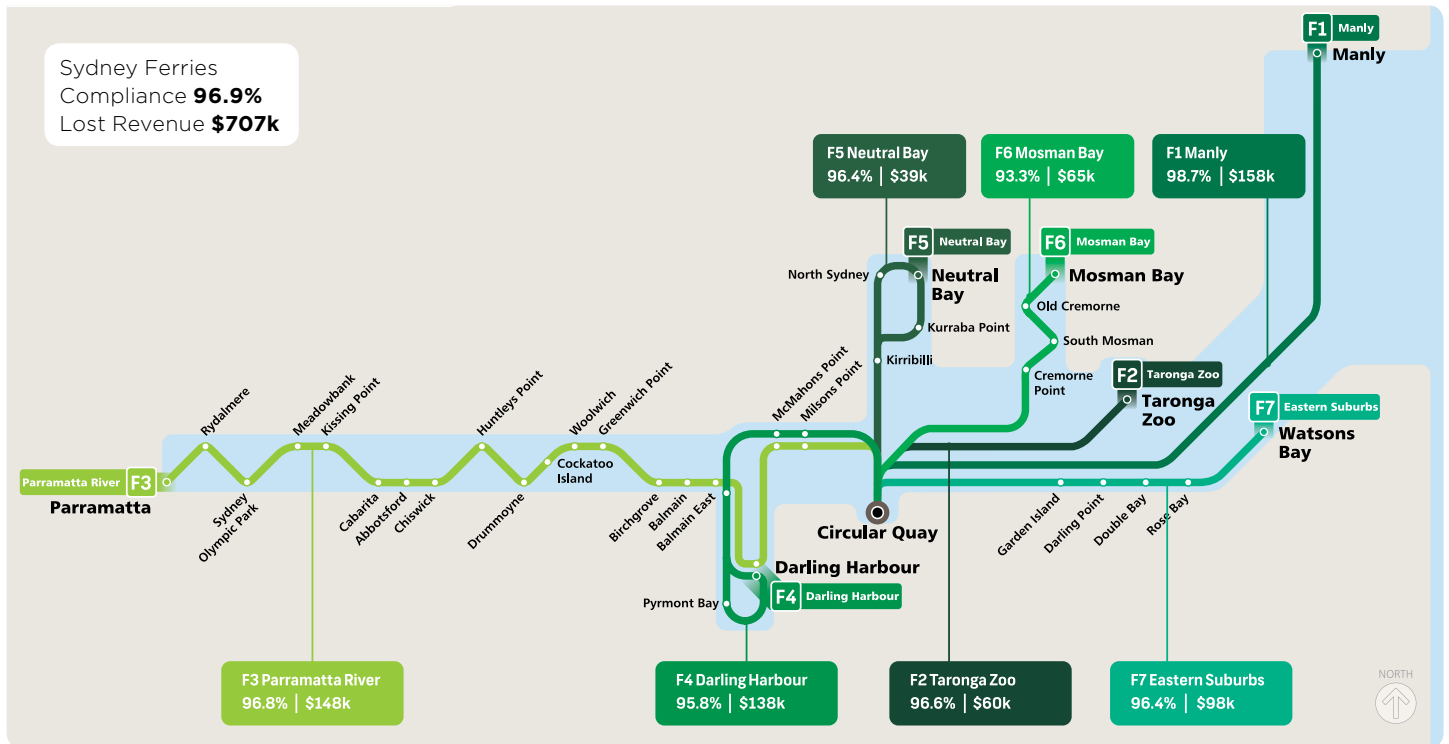
- Estimated **revenue loss for the six months to December 2015 was $9.7 million**, which accounts for 27.6% of the total estimated revenue loss across all modes. Estimated revenue loss for the six months to June 2015 was $9.9 million.

- Highest contributors to estimated revenue loss were Contract 9 (36.5%), Contract 6 (19.5%), Contract 8 (11.6%) and Contract 7 (10.0%).
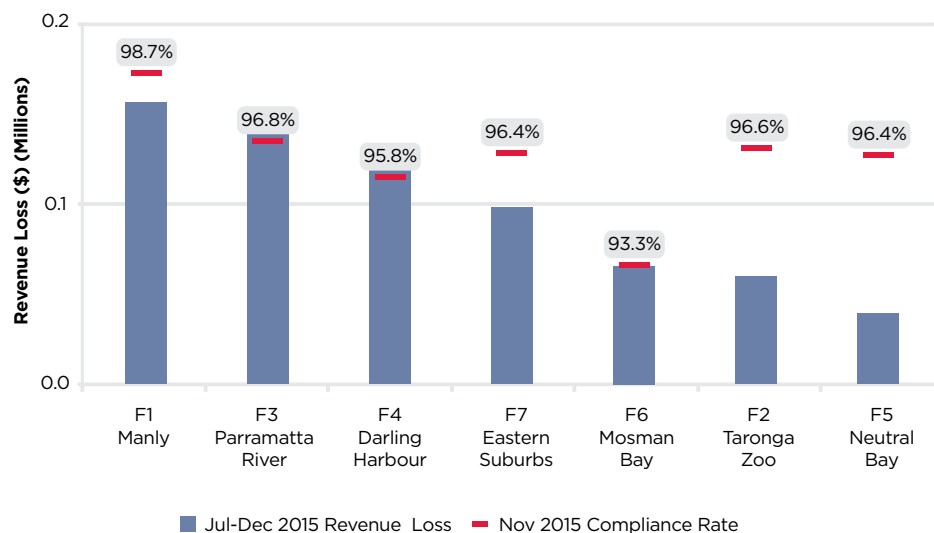
Sydney Ferries

Sydney Ferries Network Map – Fare compliance survey results

Sydney Ferries
Compliance **96.9%**
Lost Revenue **$707k**

F5 Neutral Bay 96.4% | $39k
F6 Mosman Bay 93.3% | $65k
F1 Manly 98.7% | $158k
F3 Parramatta River 96.8% | $148k
F4 Darling Harbour 95.8% | $138k
F2 Taronga Zoo 96.6% | $60k
F7 Eastern Suburbs 96.4% | $98k

- Ferry **fare compliance is estimated to be 96.9%, down by 0.5 percentage points** compared to May 2015. There was a decrease in compliance across both weekdays (0.5 percentage points) and weekends (0.6 percentage points). Compliance during the weekday AM peak and off peak remained steady, however compliance during the weekday PM peak decreased by 1.3 percentage points.

- Compliance is **highest on the Manly service** (98.7%) and **lowest on the Mosman Bay service** (93.3%).

- The **Darling Harbour service** recorded the largest decrease in compliance, **down by 1.7 percentage points** compared with May 2015.

- Estimated **revenue loss for the six months to December 2015 was $707,000**, which accounts for 2.0% of the total estimated revenue loss across all modes. Estimated revenue loss for the six months to June 2015 was $675,000.

- Highest contributors to estimated revenue loss were the Manly service (22.3%), Parramatta River service (20.9%) and Darling Harbour service (19.5%).

Compliance rate and revenue loss for Sydney Ferries

Legend: Jul-Dec 2015 Revenue Loss | Nov 2015 Compliance Rate

Sydney Light Rail

Sydney Light Rail Network Map – Fare compliance survey results

L1 Dulwich Hill Line
Compliance **96.1%**
Lost Revenue **$345k**

Stations: Darling Harbour, John Street Square, The Star, Pyrmont Bay, Fish Market, Convention, Wentworth Park, Exhibition Centre, Paddy's Markets, Capitol Square, Leichhardt North, Lilyfield, Rozelle Bay, Jubilee Park, Glebe, Central, Hawthorne, Marion, Taverners Hill, Lewisham West, Waratah Mills, Arlington, Dulwich Grove, Dulwich Hill

L1 Dulwich Hill Line

CITY

NORTH

Compliance rate and revenue loss for Sydney Light Rail

Jul-Dec 2015 Revenue Loss
Nov 2015 Compliance Rate

- Light rail **fare compliance is estimated to be 96.1%, up 0.4 percentage points** compared with May 2015.

- Compliance during the weekday AM peak and weekday off peak remained steady, compliance during the weekday PM peak improved by 3.6 percentage points and compliance on weekends decreased by 1.9 percentage points.
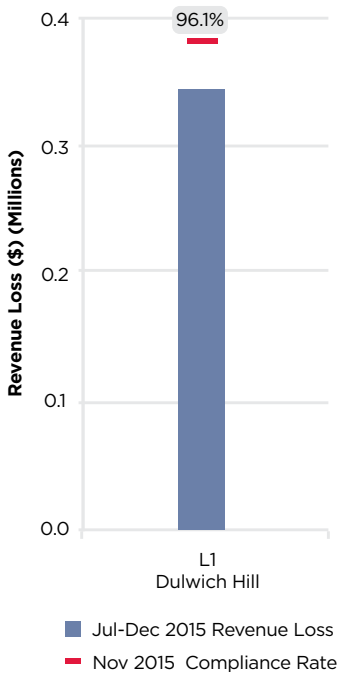
- Estimated **revenue loss for the six months to December 2015 was $345,000**, which accounts for 1.0% of the total estimated revenue loss across all modes. Estimated revenue loss for the six months to June 2015 was $318,000.

Summary of compliance and revenue loss for all modes

Mode	May 2015 Compliance (%)	May 2015 Revenue Loss ($ '000) For the six months to June 2015	Nov 2015 Compliance (%)	November 2015 Revenue Loss ($ '000) For the six months to December 2015
Sydney Trains				
T1 - North Shore	95.3%	3,550	95.0%	5,010
T1 - Northern	96.2%	1,327	97.5%	836
T1 - Western	95.2%	3,702	94.1%	4,428
T2 - Airport	94.6%	3,239	95.0%	2,643
T2 - Inner West	95.7%	1,832	95.8%	1,704
T2 - South	93.5%	1,729	95.9%	1,198
T3 - Bankstown	90.9%	2,130	95.1%	1,237
T4 - Eastern Suburbs	96.8%	748	95.9%	979
T4 - Illawarra	93.9%	3,418	95.8%	2,811
T6 - Carlingford	88.6%	69	93.0%	50
T7 - Olympic Park	93.5%	102	95.9%	73
Total Sydney Trains	**94.8%**	**21,846**	**95.3%**	**20,970**
NSW Trains – Intercity				
T - Blue Mountains	92.7%	561	95.0%	347
T - Central Coast	94.1%	1,010	93.9%	1,003
T - Hunter	77.5%	274	83.6%	188
T - Newcastle	91.8%	462	92.0%	474
T - South Coast	89.7%	1,031	89.8%	1,139
T - Southern Highlands	94.7%	84	89.7%	158
Total NSW Trains – Intercity	**91.7%**	**3,421**	**92.4%**	**3,310**
TOTAL TRAIN	**94.6%**	**25,267**	**95.2%**	**24,279**
Sydney Metropolitan Buses				
1 - Penrith, Blacktown, Richmond	97.4%	231	96.1%	352
2 - Liverpool, Ingleburn, Campbelltown	97.3%	51	98.5%	29
3 - Parramatta, Fairfield, Liverpool	93.9%	483	95.6%	312
4 - Hills District	95.7%	650	94.8%	766
5 - Bankstown, Hurstville, Roselands	96.3%	78	97.1%	63
6 - Inner West	95.6%	1,634	95.3%	1,886
7 - North Sydney, Epping, Parramatta	96.7%	793	96.2%	964
8 - Northern Beaches	93.3%	1,549	94.9%	1,120
9 - Eastern Suburbs	93.3%	3,961	93.9%	3,522
10 - Hurstville, Sutherland, Cronulla	96.6%	156	96.2%	173
12 - Chatswood, Hornsby	98.8%	20	96.8%	33
13 - Parramatta, Liverpool, Bankstown	97.4%	142	95.0%	282
14 - Frenchs Forest, St Ives, Hornsby	95.7%	143	96.7%	105
15 - Campbelltown, Camden, Macarthur	98.7%	23	97.6%	55
TOTAL SYDNEY METROPOLITAN BUSES	**95.0%**	**9,915**	**95.1%**	**9,662**
Sydney Ferries				
F1 - Manly	98.4%	208	98.7%	158
F2 - Taronga Zoo	96.3%	63	96.6%	60
F3 - Parramatta River	96.7%	179	96.8%	148
F4 - Darling Harbour	97.5%	74	95.8%	138
F5 - Neutral Bay	96.9%	26	96.4%	39
F6 - Mosman Bay	94.2%	52	93.3%	65
F7 - Eastern Suburbs	97.2%	72	96.4%	98
TOTAL FERRY	**97.4%**	**675**	**96.9%**	**707**
Sydney Light Rail				
TOTAL LIGHT RAIL	**95.7%**	**318**	**96.1%**	**345**
TOTAL ALL MODES	**94.8%**	**36,175**	**95.2%**	**34,992**