

May 2021 Fare Compliance Survey Results



Survey background

The Fare Compliance Survey is conducted twice yearly in May and November, and is designed to measure the incidence of fare 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 2021 Survey inspected approximately 55,000 Opal cards, contactless payments (credit cards, debit cards or linked devices) and single trip tickets on metro, trains, buses, ferries and light rail.

Non-compliant customers include those not carrying an Opal card, not tapping on and those travelling on discounted Opal products (eg. Concession, Child/Youth, Senior) without valid entitlement.

Due to the impact of COVID-19, the 2020 surveys were not conducted.

Fare compliance and estimated revenue loss by mode

Revenue loss figures represent estimated revenue lost due to non-compliance for the six month periods.

Mode	May 2019		Nov 2019		May 2021	
	Fare compliance (%)	Revenue loss (\$ '000) For six months to Jun 2019	Fare compliance (%)	Revenue loss (\$ '000) For six months to Dec 2019	Fare compliance (%)	Revenue loss (\$ '000) For six months to Jun 2021
Sydney Metro	-	-	98.5	614	97.9	586
Train (total)	96.4	18,828	96.2	21,797	93.9	17,926
Sydney Trains	96.6	14,629	96.4	16,957	94.2	14,592
NSW TrainLink – Intercity	94.5	4,200	93.8	4,841	91.2	3,334
Bus (total)	94.8	16,396	95.6	13,629	90.5	16,415
Sydney Metro Buses	95.0	15,001	95.8	12,054	90.8	14,630
Outer Sydney Metro Buses	92.1	1,395	91.6	1,576	87.6	1,785
Sydney Ferries	95.6	1,665	97.1	1,136	95.9	615
Sydney Light Rail	93.1	573	94.6	624	91.3	2,173
Network (total)	95.7	37,462	96.0	37,801	92.6	37,714

Non-compliance by mode and category

May 2021	No ticket Fare loss (%)	No fare loss (%)	Concession misuse (%)	Total (%)
Sydney Metro	1.2	0.0	0.9	2.1
Train (total)	3.7	1.6	0.9	6.1
Sydney Trains	3.5	1.5	0.8	5.8
NSW TrainLink – Intercity	5.2	2.1	1.5	8.8
Bus (total)	5.0	2.9	1.6	9.5
Sydney Metro Buses	5.0	2.8	1.4	9.2
Outer Sydney Metro Buses	5.7	3.7	3.0	12.4
Sydney Ferries	2.2	1.0	1.0	4.1
Sydney Light Rail	6.2	1.4	1.1	8.7
Network (total)	4.2	2.0	1.2	7.4

Notes:

- "No ticket" accounts for the majority of all non-compliance. To provide more insight, this category has been divided into "fare loss" and "no fare loss".
- "Fare loss" includes fare-paying customers carrying an Opal card or contactless payment but not tapping on, and customers carrying no ticket at all.
- "No fare loss" includes Opal single trip tickets not tapped on and free groups not tapping on, such as school students.

Compliance by day type

Monday-Friday (weekday), and Saturday-Sunday (weekend)

May 2021		
Mode	Weekday (%)	Weekend (%)
Sydney Metro	98.5	93.4
Train (total)	93.8	94.2
Sydney Trains	94.1	94.6
NSW TrainLink – Intercity	91.4	90.0
Bus (total)	90.6	89.9
Sydney Metro Buses	90.9	90.2
Outer Sydney Metro Buses	87.9	85.6
Sydney Ferries	95.9	95.9
Sydney Light Rail	91.1	92.0
Network (total)	92.7	92.4

Compliance by time of day (weekday)

AM peak (6:00am – 10:00am), and PM peak (3:00 pm – 7:00 pm)

May 2021			
Mode	AM peak (%)	PM peak (%)	Off-peak (%)
Sydney Metro	98.0	98.7	99.0
Train (total)	94.1	92.8	95.1
Sydney Trains	94.2	93.0	95.6
NSW TrainLink – Intercity	93.2	90.3	90.4
Bus (total)	91.1	88.7	92.5
Sydney Metro Buses	91.3	88.9	92.8
Outer Sydney Metro Buses	88.2	86.6	88.8
Sydney Ferries	96.0	94.8	97.2
Sydney Light Rail	94.3	88.4	91.6
Network (total)	93.0	91.3	94.0

Summary of compliance and revenue loss for all modes

Mode	May 2019 Compliance (%)	Nov 2019 Compliance (%)	May 2021 Compliance (%)	Revenue Loss (\$ '000) For the six months to Jun 2021
Sydney Metro				
Metro (total)	-	98.5	97.9	586
Sydney Trains				
T1 - North Shore & Western	97.4	96.5	93.1	4,660
T1 - North Shore	98.0	97.5	92.5	1,769
T1 - Western	96.7	95.3	93.8	2,891
T2 - Inner West & Leppington	95.6	95.8	93.6	2,926
T2 - Inner West	97.3	97.4	94.5	905
T2 - Leppington	94.5	94.6	92.9	2,021
T3 - Bankstown	95.4	94.2	94.6	1,321
T4 - Eastern Suburbs & Illawarra	97.8	97.5	96.6	2,114
T4 - Eastern Suburbs	98.2	98.0	97.4	-
T4 - Illawarra	97.4	96.9	95.7	-
T5 - Cumberland	96.0	94.2	94.3	613
T6 - Carlingford	90.7	89.6	-	-
T7 - Olympic Park	93.5	96.7	93.6	85
T8 - Airport & South	96.4	97.1	93.2	1,592
T9 - Northern	95.2	96.3	95.0	1,281
Sydney Trains (total)	96.6	96.4	94.2	14,592
NSW TrainLink – Intercity				
T - Blue Mountains	95.0	95.0	90.2	1,040
T - Central Coast & Newcastle	95.5	93.7	94.0	922
T - Southern Highlands	90.6	94.6	89.8	132
T - South Coast	93.2	93.4	87.5	1,087
T - Hunter	87.3	87.0	84.3	153
NSW TrainLink – Intercity (total)	94.5	93.8	91.2	3,334
Train (total)	96.4	96.2	93.9	17,926

Summary of compliance and revenue loss for all modes

Mode	May 2019 Compliance (%)	Nov 2019 Compliance (%)	May 2021 Compliance (%)	Revenue Loss (\$ '000) For the six months to Jun 2021
Sydney Metropolitan Buses				
SMBSC001 - Penrith, Blacktown, Richmond	93.9	89.0	88.6	1,070
SMBSC002 - Liverpool, Ingleburn, Campbelltown	89.7	96.6	89.1	228
SMBSC003 - Parramatta, Fairfield, Liverpool	94.6	94.7	89.8	804
SMBSC004 - Hills District	93.7	98.1	93.5	1,195
SMBSC005 - Bankstown, Hurstville, Roselands	94.3	95.7	89.2	304
SBSC006 - Inner West	97.1	95.0	92.9	2,812
SMBSC007 - North Sydney, Epping, Parramatta	95.9	96.8	93.8	1,222
SMBSC008 - Northern Beaches	95.7	96.5	92.3	2,136
SMBSC009 - Eastern Suburbs	93.2	96.4	91.2	3,378
SMBSC010 - Hurstville, Sutherland, Cronulla	95.6	97.5	82.5	256
SMBSC012 - Chatswood, Hornsby	96.7	96.6	93.0	158
SMBSC013 - Parramatta, Liverpool, Bankstown	94.7	95.8	83.6	633
SMBSC014 - Frenchs Forest, St Ives, Hornsby	96.9	96.3	94.1	218
SMBSC015 - Campbelltown, Camden, Macarthur	94.1	94.3	89.9	217
Sydney Metro Bus (total)	95.0	95.8	90.8	14,630
Outer Sydney Metropolitan Buses				
OSMBSC001 - Cessnock, Maitland, Newcastle	93.8	87.3	89.7	30
OSMBSC002 - Maitland, Raymond Terrace	89.0	89.3	84.4	112
OSMBSC003 - Port Stephens, Newcastle	90.2	90.4	78.1	21
OSMBSC004 - Maryland, Edgeworth, Toronto	82.7	82.7	73.5	77
NISC001 - Newcastle, Lake Macquarie	89.7	87.1	85.7	687
OSMBSC006 - Gosford, Wyong (Busways)	94.6	94.1	89.6	260
OSMBSC007 - Gosford, Wyong (Red Bus Service)	90.2	96.9	83.9	283
OSMBSC008 - Katoomba, Springwood, Penrith	86.3	87.6	92.0	63
OSMBSC009 - Wollongong, Stanwell Park, Helensburgh	92.8	93.0	95.7	7
OSMBSC010 - Kiama, Dapto, Wollongong	97.7	97.6	93.7	209
OSMBSC011 - Wyong	96.6	96.7	88.1	4
OSMBSC012 - Wollongong, Corrimal, Thirroul	97.5	97.5	93.8	32
Outer Sydney Metro Bus (total)	92.1	91.6	87.6	1,785
Bus (total)	94.8	95.6	90.5	16,415
Sydney Ferries				
F1 - Manly	98.7	98.5	96.3	176
F2 - Taronga Zoo	94.8	97.6	97.6	35
F3 - Parramatta River	92.8	97.5	96.5	117
F4 - Cross Harbour	93.7	95.4	-	-
F4 - Pyrmont Bay	-	-	92.7	123
F5 - Neutral Bay	97.4	98.3	97.9	13
F6 - Mosman Bay	97.0	96.6	95.2	48
F7 - Double Bay	95.9	97.0	97.3	9
F8 - Cockatoo Island	94.6	94.9	92.9	38
F9 - Watsons Bay	-	-	97.2	55
Sydney Ferries (total)	95.6	97.1	95.9	615

Summary of compliance and revenue loss for all modes

Mode	May 2019 Compliance (%)	Nov 2019 Compliance (%)	May 2021 Compliance (%)	Revenue Loss (\$ '000) For the six months to Jun 2021
Sydney Light Rail				
L1 - Dulwich Hill	93.1	94.6	91.2	546
L2 - Randwick	-	-	91.5	765
L3 - Kingsford	-	-	91.8	861
Light Rail (total)	93.1	94.6	91.3	2,173
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Network (total)	95.7	96.0	92.6	37,714

Notes:

1. Compliance and non-compliance percentages may not add to 100%; minor discrepancies for totals are a result of rounding.
2. Outer Sydney Metro Bus regions 3, 4, 9, 11 & 12 were not surveyed in November 2019. Results from May 2019 were reweighted to updated patronage data to estimate a fare non-compliance rate for November 2019. All Outer Sydney Metro Bus regions were surveyed in May 2021.
3. NISC001 region includes buses, Stockton Ferry and Newcastle Light Rail.
4. Sydney Metro and Newcastle Light Rail were both surveyed for the first time in November 2019.
5. Two new Light Rail lines have become operational since the November 2019 survey. The L2 Randwick Line opened 14 December 2019 and the L3 Kingsford Line opened 3 April 2020.
6. From 25 October 2020 the F4 Cross Harbour route was divided into two new routes- the F4 Pyrmont Bay and F9 Watsons Bay routes