

November 2023 Fare Compliance Survey Results

February 2024



Survey Background

The Fare Compliance Survey is conducted twice yearly in May and November, and is designed to measure the incidence of fare 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 non-compliance and public transport cost recovery.

The November 2023 Survey inspected approximately 51,000 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 (e.g. Concession, Child/Youth, Senior) without valid entitlement.

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 2022		May 2023		Nov 2023	
	Fare Compliance (%)	Revenue Loss (\$'000) Jan to Jun 2022	Fare Compliance (%)	Revenue Loss (\$'000) Jan to Jun 2023	Fare Compliance (%)	Revenue Loss (\$'000) Jul to Dec 2023
Sydney Metro	97.1	456	95.1	1,541	95.7	1,678
Train (total)	92.7	18,808	92.0	33,099	94.0	28,345
Sydney Trains	92.8	16,008	92.3	26,323	94.6	21,404
NSW TrainLink	91.2	2,800	88.4	6,776	87.6	6,941
Bus (total)	87.1	19,892	88.8	24,949	91.4	21,489
Sydney Metro Buses	87.2	18,528	89.0	22,326	92.0	18,603
Outer Sydney Metro Buses	85.6	1,363	86.1	2,623	83.4	2,886
Sydney Ferries	89.5	2,007	95.8	1,550	95.5	1,761
Sydney Light Rail	88.9	2,599	90.1	4,296	92.1	4,130
Network (total)	90.3	43,762	90.8	65,435	93.0	57,403

Non-compliance by mode and category

November 2023 Mode	No ticket Fare loss (%)	No ticket No fare loss (%)	Concession misuse (%)	Total (%)
Sydney Metro	2.4	1.0	0.9	4.3
Train (total)	4.0	1.3	0.7	6.0
Sydney Trains	3.6	1.2	0.6	5.4
NSW TrainLink	7.6	2.4	2.2	12.3
Bus (total)	4.9	3.0	0.7	8.6
Sydney Metro Buses	4.6	2.8	0.6	8.0
Outer Sydney Metro Buses	8.7	5.6	2.3	16.6
Sydney Ferries	2.8	0.8	0.9	4.5
Sydney Light Rail	6.4	1.0	0.5	7.9
Network (total)	4.4	1.9	0.7	7.0

Notes:

1. "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".
2. "Fare loss" includes fare-paying customers carrying an Opal card or contactless payment but not tapping on, and customers carrying no ticket at all.
3. "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

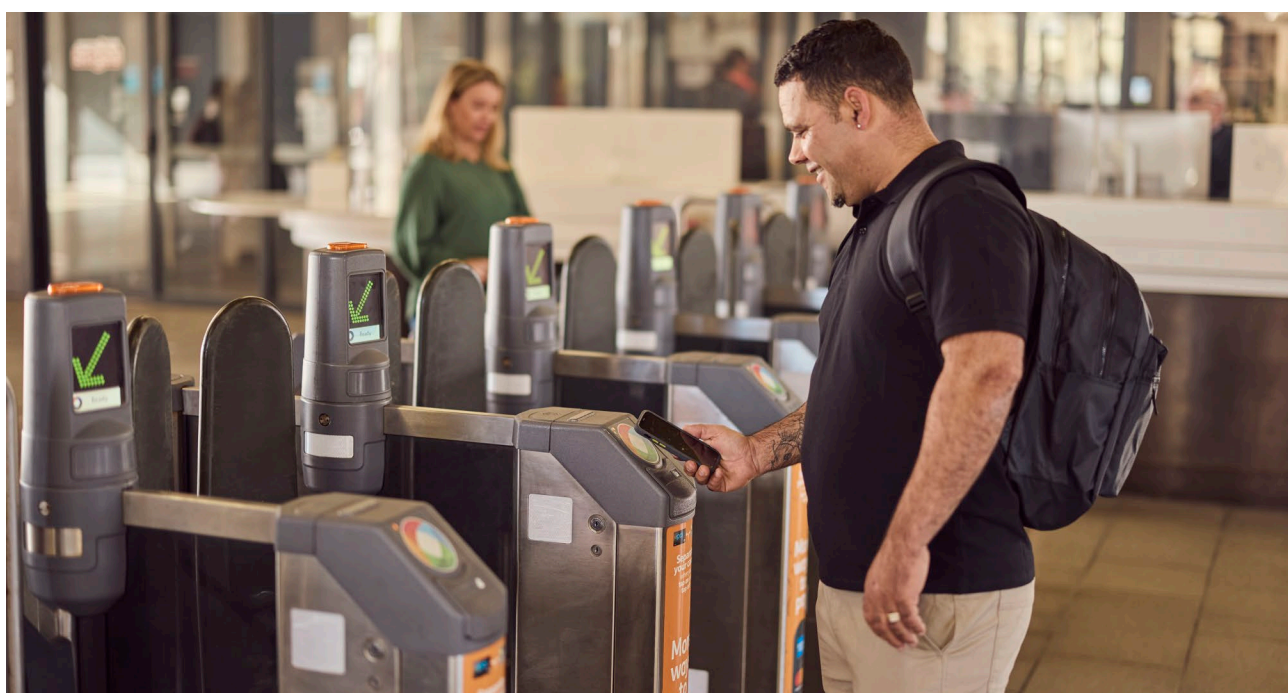
Monday - Friday (weekday), and Saturday - Sunday (weekend)

November 2023 Mode	Weekday (%)	Weekend (%)
Sydney Metro	96.1	93.8
Train (total)	93.9	94.2
Sydney Trains	94.6	95.0
NSW TrainLink	87.7	87.5
Bus (total)	91.1	92.5
Sydney Metro Buses	91.7	93.0
Outer Sydney Metro	83.1	85.0
Sydney Ferries	95.6	95.4
Sydney Light Rail	91.6	93.3
Network (total)	92.9	93.5

Compliance by time of day (weekday)

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

November 2023 Mode	AM peak (%)	PM peak (%)	Off-peak (%)
Sydney Metro	97.0	95.4	96.0
Train (total)	94.5	92.4	95.1
Sydney Trains	95.0	93.5	95.5
NSW TrainLink	90.4	81.4	92.1
Bus (total)	91.1	89.4	93.3
Sydney Metro Buses	91.6	90.0	93.9
Outer Sydney Metro	83.7	78.2	86.7
Sydney Ferries	95.5	96.0	95.4
Sydney Light Rail	91.7	93.2	89.8
Network (total)	93.2	91.6	94.1



Summary of compliance and revenue loss for all modes

Mode	May 2022 Compliance (%)	May 2023 Compliance (%)	November 2023 Compliance (%)	Revenue Loss (\$'000) Jul to Dec 2023
Sydney Metro				
Metro (total)	97.1	95.1	95.7	1,678
Sydney Trains				
T1 – North Shore & Western	94.4	94.2	94.1	7,289
T1 – North Shore	94.7	94.1	94.9	2,499
T1 – Western	94.2	94.4	93.3	4,790
T2 – Inner West & Leppington	92.1	91.2	93.2	4,937
T2 – Inner West	92.1	95.2	96.0	963
T2 – Leppington	92.1	88.1	91.2	3,974
T3 – Bankstown	90.2	86.2	91.7	2,106
T4 – Eastern Suburbs & Illawarra	90.1	92.3	96.4	2,693
T4 – Eastern Suburbs	94.1	91.1	96.7	-
T4 – Illawarra	86.2	92.6	95.8	-
T5 – Cumberland	91.7	90.2	93.4	800
T7 – Olympic Park	89.8	90.7	92.7	120
T8 – Airport & South	95.1	93.6	95.9	2,226
T9 – Northern	95.6	93.1	96.5	1,233
Sydney Trains (total)	92.8	92.3	94.6	21,404
NSW TrainLink				
T – Blue Mountains	87.2	87.7	90.2	1,346
T – Central Coast & Newcastle	93.4	90.2	87.8	3,122
T – Southern Highlands	88.4	87.5	91.3	171
T – South Coast	89.8	87.5	85.7	1,908
T – Hunter	80.1	78.6	77.0	394
NSW TrainLink (total)	91.2	88.4	87.7	6,941
Train (total)	92.7	92.0	94.0	28,345
Sydney Metropolitan Buses				
GSBC1 - Penrith, Blacktown, Richmond	85.7	85.9	82.4	1,227
GSBC2 - Liverpool, Campbelltown, Camden, Macarthur	79.5	87.0	86.1	788
GSBC3 - Parramatta, Fairfield, Liverpool, Bankstown	88.5	88.2	87.3	2,117
GSBC4 - Hills District	84.5	93.1	93.6	873
SBSC6 - Inner West	89.4	89.1	93.4	4,369
GSBC7 - North Sydney, Epping, Parramatta	85.9	90.9	92.2	1,879
GSBC8 - Northern Beaches	88.6	92.6	93.3	2,142
GSBC9 - Eastern Suburbs	86.3	87.0	94.5	3,940
GSBC10 - Hurstville, Sutherland, Cronulla,	88.4	85.6	84.8	797
GSBC14 - Chatswood, Hornsby, Frenchs Forest, St Ives, Hornsby	94.2	91.2	92.4	471
Sydney Metro Bus (total)	87.2	89.0	92.0	18,603

Mode	May 2022 Compliance (%)	May 2023 Compliance (%)	November 2023 Compliance (%)	Revenue Loss (\$'000) Jul to Dec 2023
Outer Sydney Metropolitan Buses				
OSMBSC001 - Cessnock, Maitland, Newcastle	90.0	91.8	83.5	47
OSMBSC002 - Maitland, Raymond Terrace	85.6	83.4	67.9	223
OSMBSC003 - Port Stephens, Newcastle	72.6	80.5	69.0	50
OSMBSC004 - Maryland, Edgeworth, Toronto	62.8	66.1	62.1	219
NISC001 - Newcastle, Lake Macquarie	81.5	79.1	76.8	1,437
OSMBSC006 - Gosford, Wyong (Busways)	85.4	82.7	84.8	427
OSMBSC007 - Gosford, Wyong (Red Bus)	89.8	85.0	86.5	234
OSMBSC008 - Katoomba, Springwood,	79.5	89.1	89.2	93
OSMBSC009 - Wollongong, Stanwell Park,	91.5	97.9	96.5	7
OSMBSC010 - Kiama, Dapto, Wollongong	96.3	96.4	97.2	114
OSMBSC011 - Wyong	77.4	70.1	80.3	7
OSMBSC012 - Wollongong, Corrimal, Thirroul	98.3	96.9	96.0	28
Outer Sydney Metro Bus (total)	85.6	86.1	83.4	2,886
Bus (total)	87.1	88.8	91.4	21,489
Sydney Ferries				
F1 – Manly	96.4	97.7	98.0	468
F2 – Taronga Zoo	86.9	95.8	92.9	282
F3 – Parramatta River	90.4	95.3	95.3	297
F4 – Pyrmont Bay	82.0	93.4	92.3	365
F5 – Neutral Bay	90.3	95.3	97.4	34
F6 – Mosman Bay	91.2	96.2	97.5	44
F7 – Double Bay	86.9	95.7	96.5	6
F8 – Cockatoo Island	81.1	92.6	95.4	40
F9 – Watsons Bay	87.7	94.3	94.8	223
Sydney Ferries (total)	89.5	95.8	95.5	1,761
Sydney Light Rail				
L1 – Dulwich Hill	92.9	87.6	92.3	723
L2 – Randwick	89.7	90.3	91.9	1,722
L3 – Kingsford	86.6	91.0	92.1	1,685
Light Rail (total)	88.9	90.1	92.1	4,130
Network (total)	90.3	90.8	93.0	57,403

Notes:

1. Compliance and non-compliance percentages may not add to 100%; minor discrepancies for totals are a result of rounding.
2. Due to the impact of Protected Industrial Action during late 2022 the November 2022 survey was not conducted.
3. All Outer Sydney Metro Bus regions are surveyed in each wave, since May 2021.
4. NISC001 region includes buses, Stockton Ferry and Newcastle Light Rail.
5. From the May 2022 Survey, bus contract regions SMBSC007, SMBSC008 and SMBSC009 are classified as GSBC007, GSBC008 and GSBC009.
6. Changes to Sydney metropolitan bus contracts are detailed below:
 - a. * Regions 12 and 14 were combined on 21 May 2023 to form GSBC 14
 - b. * Regions 5 and 10 were combined on 1 July 2023 to form GSBC 10
 - c. * Regions 3 and 13 were combined on 6 August 2023 to form GSBC 3
 - d. * Regions 2 and 15 were combined on 8 October 2023 to form GSBC 2

