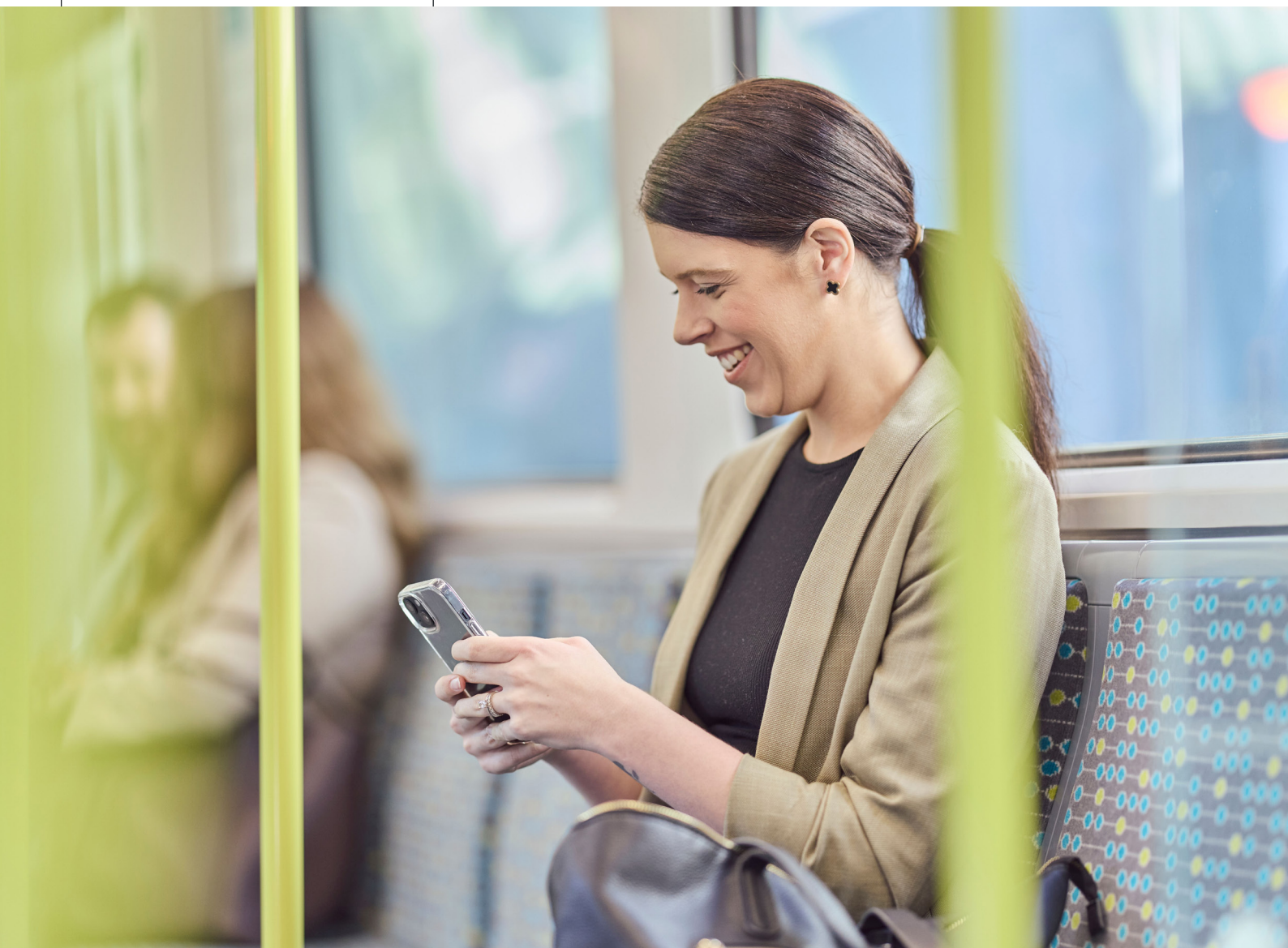


Customer Satisfaction Index

November 2024



Contents

Executive summary	2
Customer satisfaction methodology	3
November 2024 results	5
Overall train network customer satisfaction	6
Overall bus regions customer satisfaction	7
Overall ferry routes customer satisfaction	8
Overall light rail customer satisfaction	9
Overall metro customer satisfaction	10

Executive summary

The NSW Government’s vision is for an integrated public transport system that drives better outcomes for all people and passengers.

Transport for NSW is tasked with putting people and passengers at the centre of our decision making to boost customer satisfaction across the public transport network of NSW.

The Customer Satisfaction Index November 2024 independently brings together the voices of over 12,000 people, and demonstrates current satisfaction levels across all public transport.

By publishing these results, Transport for NSW is enabling operators and the agency to drive accountability for continual improvement for people and passengers across the transport network.

We will keep talking with people about what matters to them, be accountable for our performance and in turn drive a better public transport system for all passengers.

The below table shows the movement in overall customer satisfaction over time:

Overall customer satisfaction								
Mode	Nov 2012	May 2021	May 2022	Nov 2022	May 2023	Nov 2023	May 2024	Nov 2024
Overall train network	79%	93%	92%	85%	90%	89%	87%	89%
Overall bus regions	79%	93%	92%	89%	90%	89%	87%	88%
Overall ferry routes*	94%	99%	98%	98%	98%	98%	98%	98%
Overall light rail	91%	93%	93%	91%	93%	93%	92%	91%
Overall metro	N/A	98%	98%	97%	99%	98%	97%	98%

*Newcastle (Stockton) Ferry was first included in May 2022 and subsequent periods. Manly Fast Ferry was first included in May 2024.

Customer satisfaction methodology

Background

Transport for NSW conducts surveys twice a year to measure customer satisfaction levels across the NSW public transport system.

In the last report, we reported on satisfaction from May 2024. In this report, we look at data from our November 2024 survey.

We will continue to survey passengers to help us drive improvements across public transport.

The survey was designed by Transport for NSW to ensure that it measured the service attributes that passengers value the most. The division used customer research to determine what drives customer satisfaction levels across the various modes. This information was then used to design the questions in the surveys. The results present what passengers value most, focusing on the top nine customer service priorities including timeliness, safety & security and comfort.

The Customer Satisfaction Index November 2024 includes responses from over 12,000 passengers across five transport modes: train, bus, ferry, light rail and metro.

Scale

The survey uses a seven-point scale in order to differentiate levels of satisfaction as shown below. The top three ratings together are defined as satisfied and the bottom three ratings together are defined as dissatisfied.

Dissatisfied				Satisfied		
1	2	3	4	5	6	7
Very Dissatisfied	Dissatisfied	Partly Dissatisfied	Neither Satisfied nor Dissatisfied	Partly Satisfied	Satisfied	Very Satisfied

Customer satisfaction methodology

Survey methodology

The surveys applied sampling in two stages to better represent the average passenger's opinions. Firstly, services were randomly selected by surveyors to meet quotas and secondly, passengers on board those services were randomly selected by surveyors. In order to reduce sampling error, maximums were placed on the number of passengers to be sampled within each vehicle, at 40 passengers for train, bus, light rail and metro and 100 passengers for ferry. Sample sizes on board most of the services stayed within these maximums and were exceeded in only a few cases.

The surveys aim to achieve a margin of error of approximately $\pm 5\%$ with a 95% confidence interval at the bus region, ferry route and train or light rail line level of reporting. Regions of high error have been noted and certain regions of geographical or operational similarity may have been aggregated.

Survey interviewers worked seven hour shifts in pairs to distribute and collect surveys. Shift times include:

- Weekday am 6:30 am – 1:30 pm
- Weekday pm 1:30 pm – 8:30 pm
- Weekend 10:00 am – 5:00 pm

While on board, passengers were asked about their experience of their current trip or most recent experience. Where passengers were unable to complete the survey on board, fax and mail back options were provided.

In order to get a result for each overall mode, survey results were weighted for patronage along each line, region or route. The results are then presented for the overall network and the individual operating corridors.

Eligibility

Passengers were selected to participate in the survey for train, bus, ferry, light rail and metro while travelling on a typical day of a typical week. A typical day includes weekdays and weekends, but does not include school holidays, public holidays or special events. Passengers include all users of the NSW train, bus, ferry, metro and light rail network, including local residents, interstate Passengers and overseas visitors.

Passengers under 17 years old were excluded from the survey and surveys were not distributed to school children in uniform.

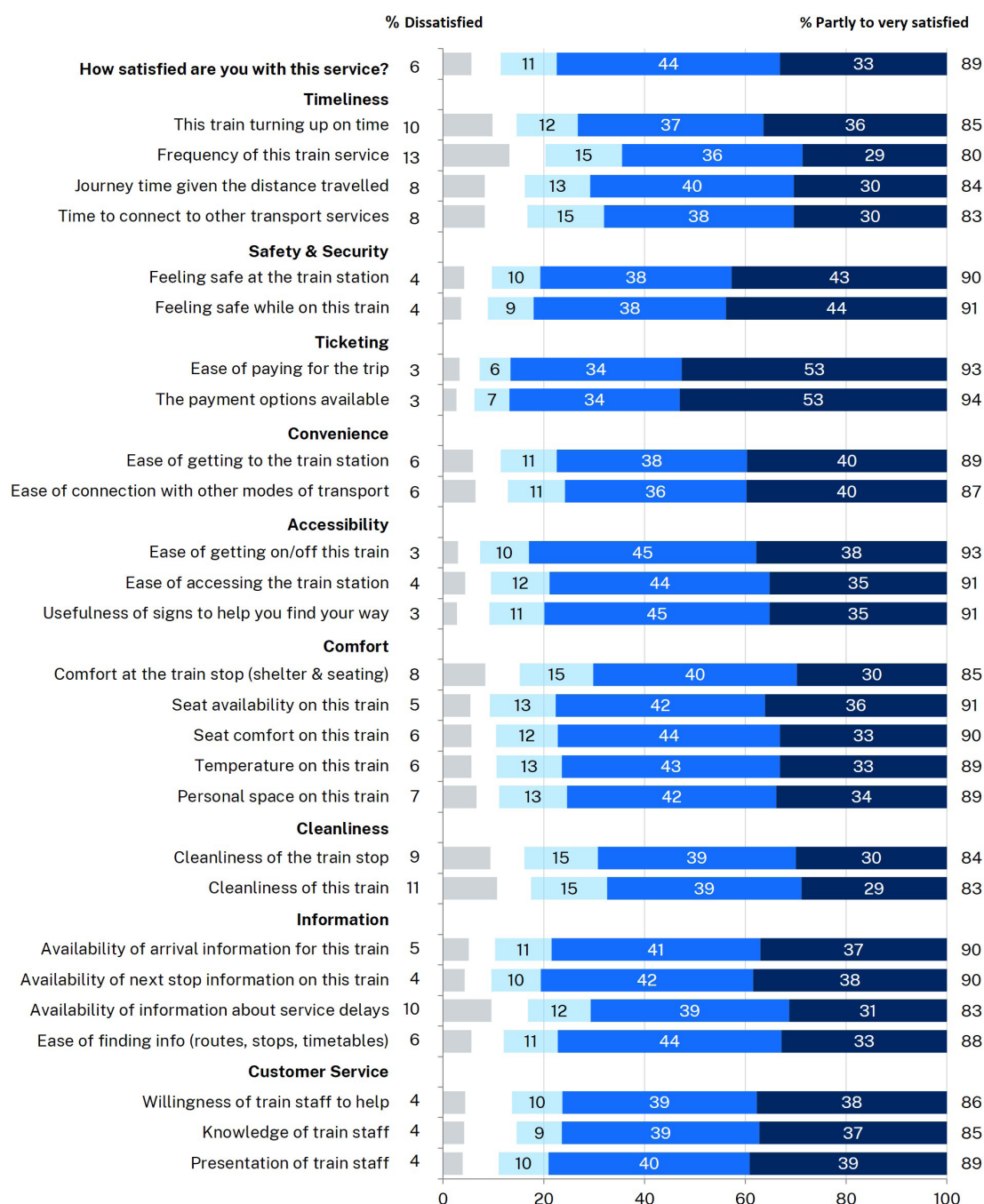
Notes about the customer satisfaction results in this report

The reported variance between some results across time periods may differ from the variance between the whole number results due to rounding.

November 2024 results

Overall train network customer satisfaction

89%
satisfied



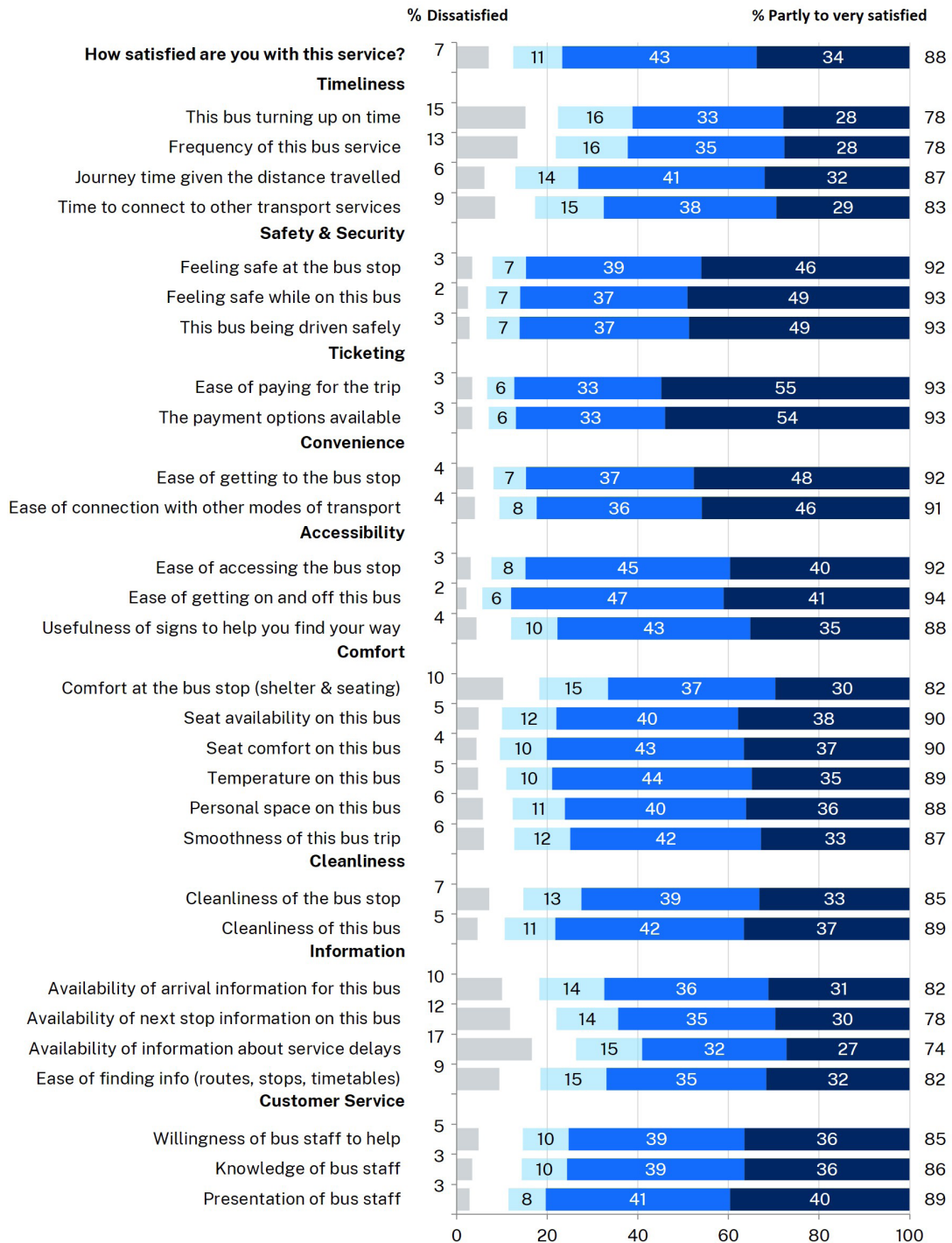
Summary

- Satisfaction with the train network is 89%.
- Passengers were most satisfied with Ticketing: including the payment options available.
- Passengers were least satisfied with Cleanliness and Timeliness: including cleanliness of the train and frequency of train service.

Dissatisfied includes individuals who responded that they were partly to very dissatisfied. The gap after dissatisfied represents a response of neither satisfied nor dissatisfied. Partly satisfied, satisfied and very satisfied are displayed independently from left to right.

Overall bus regions customer satisfaction

88%
satisfied



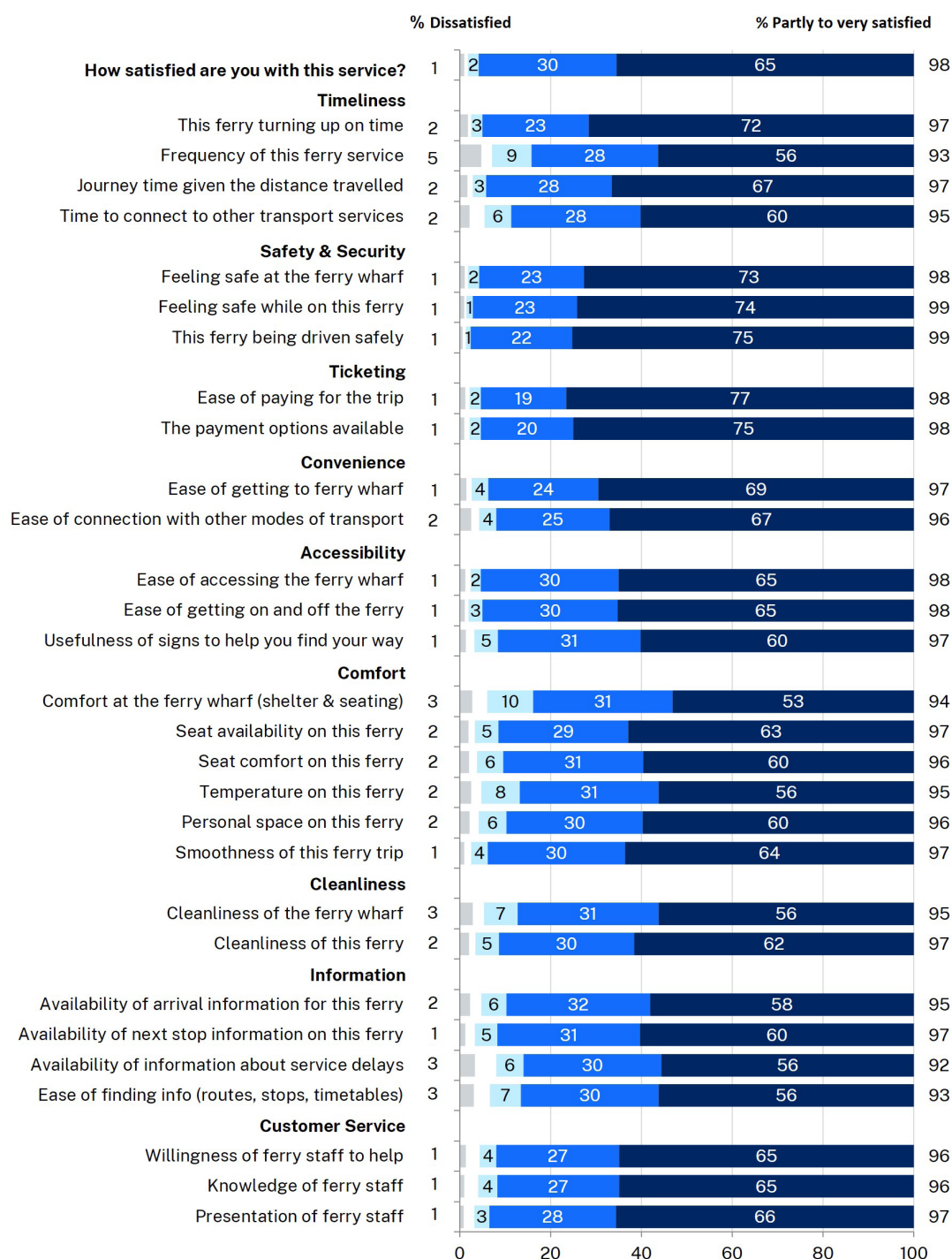
Summary

- Satisfaction with the bus network is 88%.
- Passengers were most satisfied with Ticketing: including payment options available and ease of paying for the trip.
- Passengers were least satisfied with Information: including availability of information about service delays.

Dissatisfied includes individuals who responded that they were partly to very dissatisfied. The gap after dissatisfied represents a response of neither satisfied nor dissatisfied. Partly satisfied, satisfied and very satisfied are displayed independently from left to right.

Overall ferry routes customer satisfaction

98%
satisfied



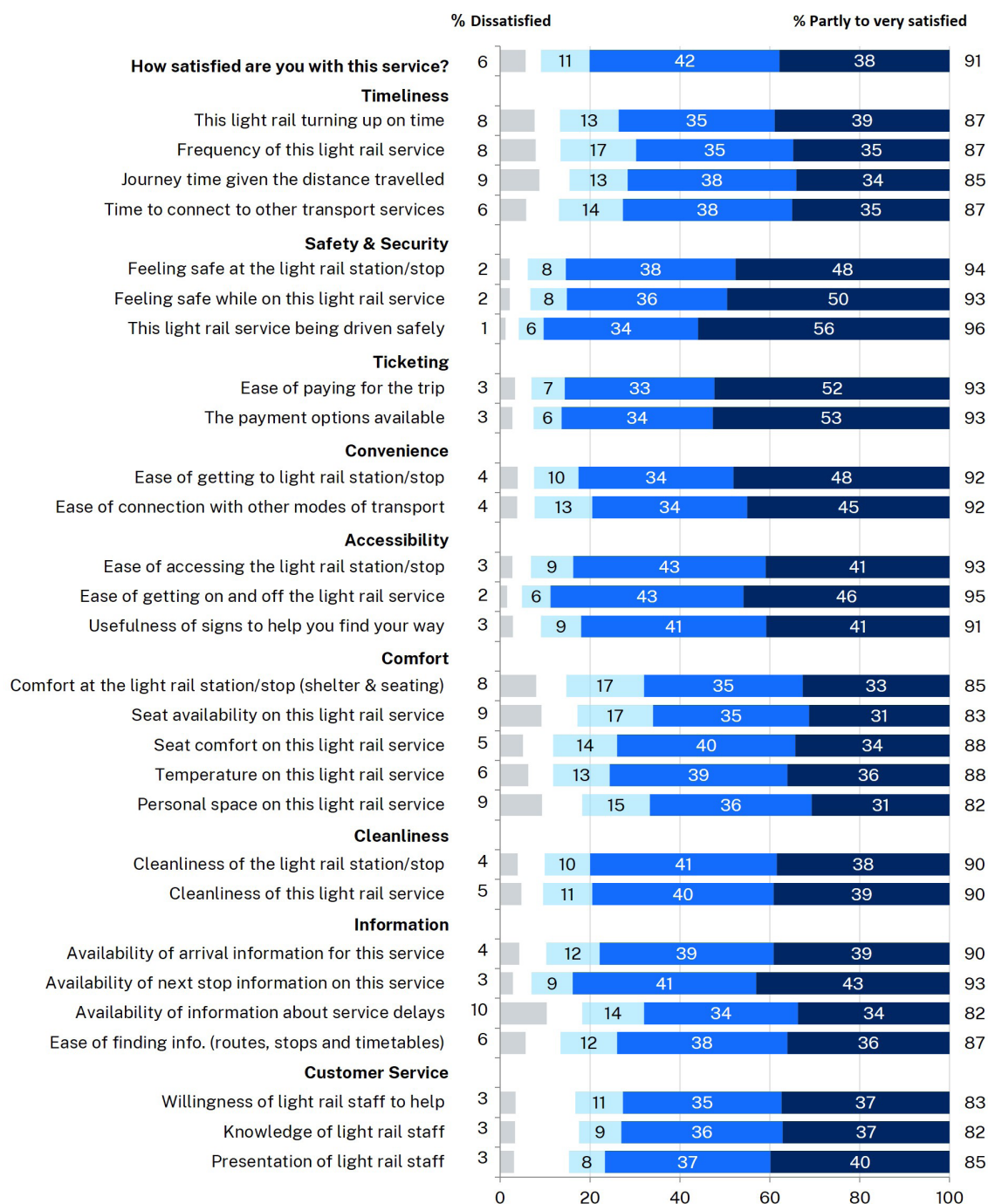
Summary

- Satisfaction with the ferry network remains high at 98%.
- Passengers were most satisfied with Safety & Security: including feeling safe while on the ferry and that the ferry was being driven safely.
- Passengers were least satisfied with Information: including availability of information about service delays.

*Includes Sydney ferry services (including Manly Fast Ferry) and Newcastle Stockton ferry
Dissatisfied includes individuals who responded that they were partly to very dissatisfied. The gap after dissatisfied represents a response of neither satisfied nor dissatisfied. Partly satisfied, satisfied and very satisfied are displayed independently from left to right

Overall light rail customer satisfaction

91%
satisfied



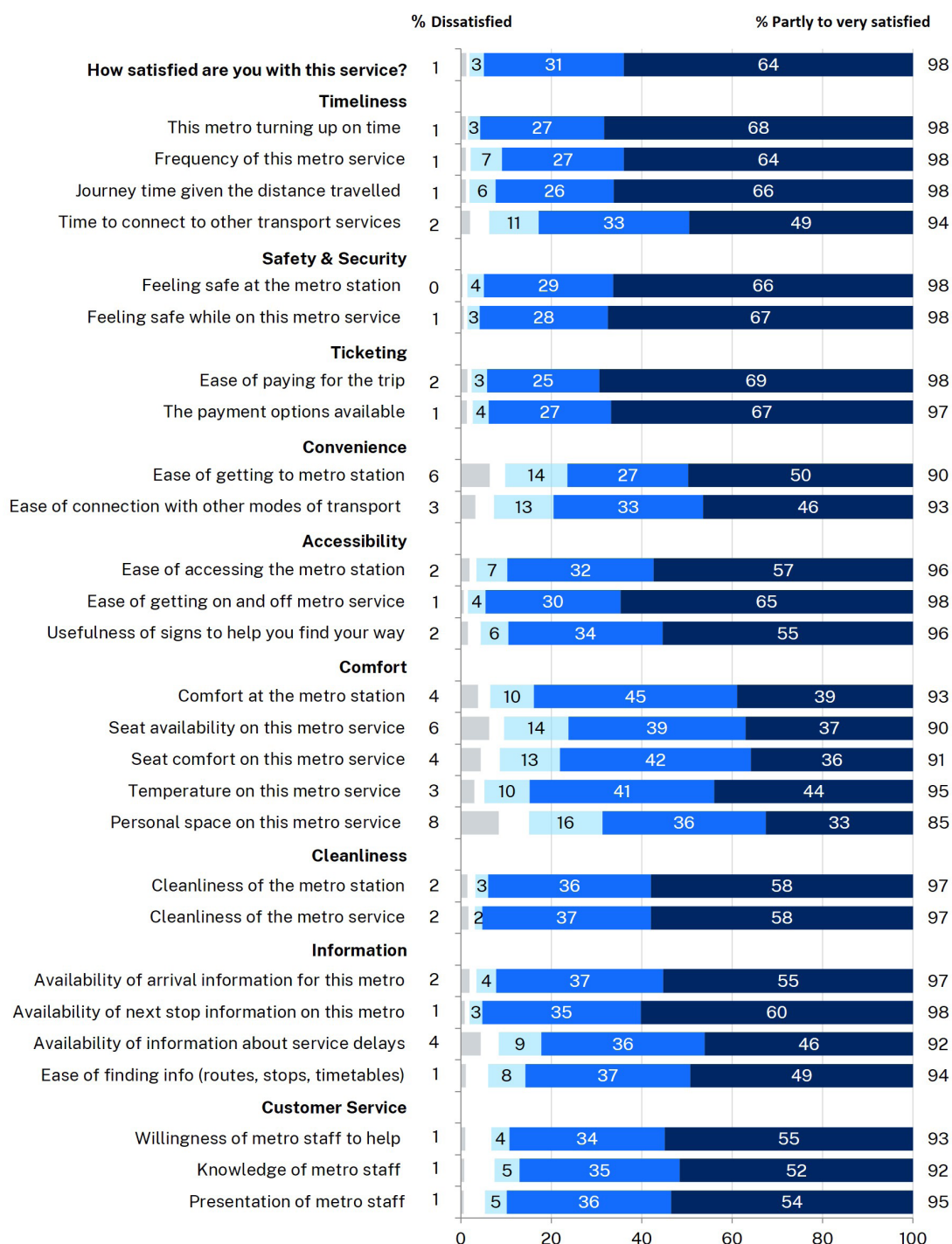
Summary

- Satisfaction with light rail remains high at 91%.
- Passengers were most satisfied with Safety & Security: including light rail service being driven safely.
- Passengers were least satisfied with Customer Service: including knowledge of light rail staff.

Dissatisfied includes individuals who responded that they were partly to very dissatisfied. The gap after dissatisfied represents a response of neither satisfied nor dissatisfied. Partly satisfied, satisfied and very satisfied are displayed independently from left to right

Overall metro customer satisfaction

98%
satisfied



Summary

- Satisfaction on the Metro service is high at 98%.
- Metro passengers were most satisfied with Safety & Security: including feeling safe at the metro station and feeling safe while on the metro.
- Passengers were least satisfied with Comfort: including personal space on the metro

Dissatisfied includes individuals who responded that they were partly to very dissatisfied. The gap after dissatisfied represents a response of neither satisfied nor dissatisfied. Partly satisfied, satisfied and very satisfied are displayed independently from left to right.

Transport for NSW

7 Harvest Street,
Macquarie Park, NSW 2113

E: CSTMailbox_AAI@transport.nsw.gov.au

transport.nsw.gov.au

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Roads Customer Satisfaction Index

November 2024



Contents

Executive summary	2
Customer satisfaction methodology	3
November 2024 results	5
Private vehicle customer satisfaction	6
Heavy vehicle customer satisfaction	7
Motorcycle customer satisfaction	8
Bicycle customer satisfaction	9
Walking customer satisfaction	10

Executive summary

The NSW Government’s vision is for an integrated transport system that drives better outcomes for all people and passengers.

The Roads Customer Satisfaction Index November 2024 independently brings together the voices of over 6,900 road users, and demonstrates current satisfaction levels across all transport modes for roads.

By publishing these results, Transport for NSW is enabling operators and the agency to drive accountability for continual improvement for people using the transport network.

We will keep talking with people and passengers about what matters to them, be accountable for our performance and in turn drive a better transport system for all users.

The below table shows overall roads customer satisfaction over time:

Overall customer satisfaction									
Mode	Nov 2015	May 2019	May 2021	May 2022	Nov 2022	May 2023	Nov 2023	May 2024	Nov 2024
Private Vehicle	85%	85%	85%	88%	87%	86%	90%	88%	91%
Heavy Vehicle	67%	70%	70%	63%	58%	64%	66%	68%	66%
Motorcycle	86%	87%	92%	93%	89%	84%	90%	87%	91%
Bicycle	84%	85%	87%	90%	87%	87%	92%	91%	90%
Walking	85%	87%	85%	88%	89%	90%	91%	91%	91%

Customer satisfaction methodology

Background

Transport for NSW has conducted surveys each year to measure customer satisfaction levels across NSW roads since November 2015. We will continue to survey passengers and users each year to help us drive improvement.

The survey was designed by Transport for NSW to ensure that it measured the service attributes that customers value the most. The division used customer research to determine what drives customer satisfaction levels across the various modes. This information was then used to design the questions in the surveys. The results present what transport users value most, focusing on the top customer service priorities including journey time reliability, safety, road quality and design.

The Roads Customer Satisfaction Index (RCSI) November 2024 includes responses from over 6,900 users across five modes: private vehicle, heavy vehicle, motorcycle, bicycle and walking.

Scale

The survey uses a seven-point scale in order to differentiate levels of satisfaction as shown below. The top three ratings together are defined as satisfied and the bottom three ratings together are defined as dissatisfied.

Dissatisfied				Satisfied		
1	2	3	4	5	6	7
Very Dissatisfied	Dissatisfied	Partly Dissatisfied	Neither Satisfied nor Dissatisfied	Partly Satisfied	Satisfied	Very Satisfied

Survey methodology

The survey is a stratified simple random sample according to a sampling frame. Individual sampling frames have been constructed for each of the individual surveys underpinning the RCSI (passenger vehicle, heavy vehicle, motorcycle, bicycle, walking) to achieve a sample that is statistically representative of the population of the users of the service and is achievable during the in-field period based on known incidence rates in previous surveys.

Sampling and sample sizes set for each of the RCSI modes aims to achieve a Margin of Error (MoE) of less than +/-5% with 95% confidence interval for each service overall and a MoE of less than +/-10% with 95% confidence interval for each of the quota variables. Post weighting may then be used to re-align distributions to be representative of the population.

Transport users were surveyed regarding their most recent experience by means of an online questionnaire with additional face-to-face interviews where required. Transport users were recruited via an online panel and emailed invitations to participate in the survey. Response rates were monitored on a daily basis and were used to determine number of reminders sent to panel members. Survey data is weighted based on ABS and Household Travel Survey (HTS) statistics.

Customer satisfaction methodology

Eligibility

Individuals over 18 years of age were eligible to complete the survey if they had recently travelled using private vehicle (within last 24 hours), heavy vehicle (within last 6 months), motorcycle (within last week), bicycle (within last 6 months) or by walking (within last 24 hours) and their home postcode was within NSW.

Notes about the customer satisfaction results in this report

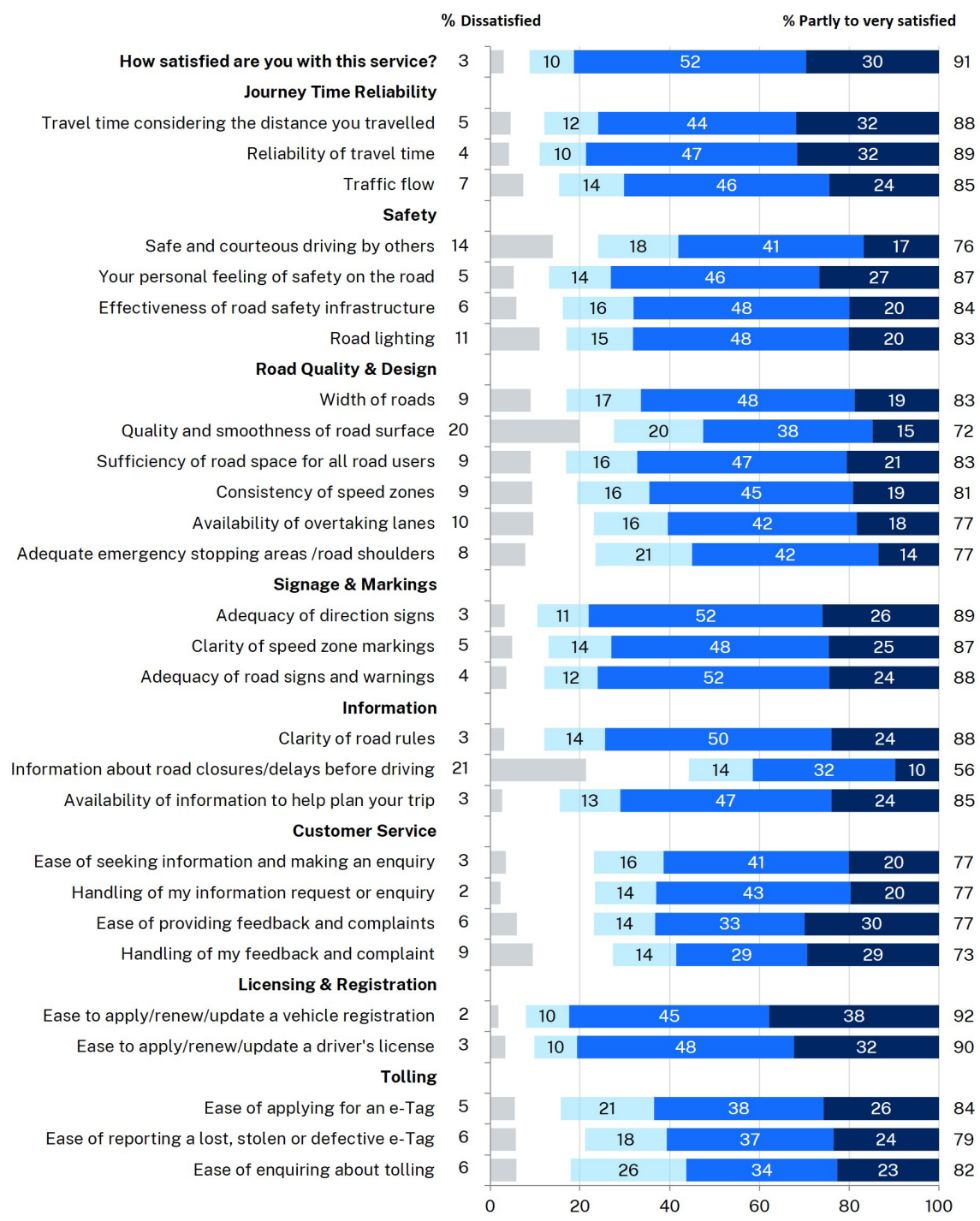
The reported variance between some results across time periods may differ from the variance between the whole number results due to rounding.



November 2024 results

Private vehicle customer satisfaction

91%
satisfied



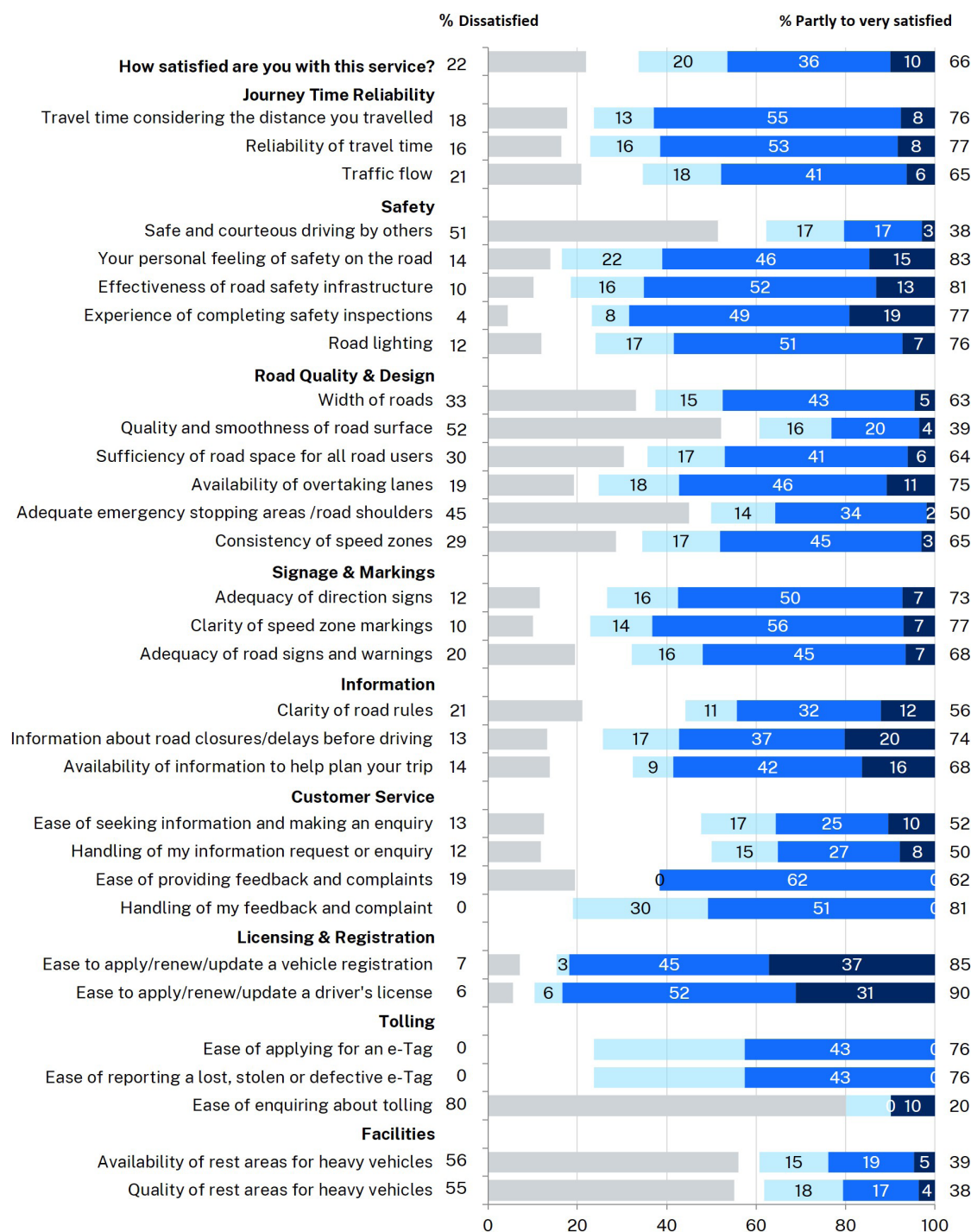
Summary

- Satisfaction with private vehicle trips is 91%
- Private vehicle users were most satisfied with Licensing & Registration: including ease to apply/renew/update vehicle registration
- Private vehicle users were least satisfied with Customer Service.

Dissatisfied includes individuals who responded that they were partly to very dissatisfied. The gap after dissatisfied represents a response of neither satisfied nor dissatisfied. Partly satisfied, satisfied and very satisfied are displayed independently from left to right.

Heavy vehicle customer satisfaction

66%
satisfied



Summary

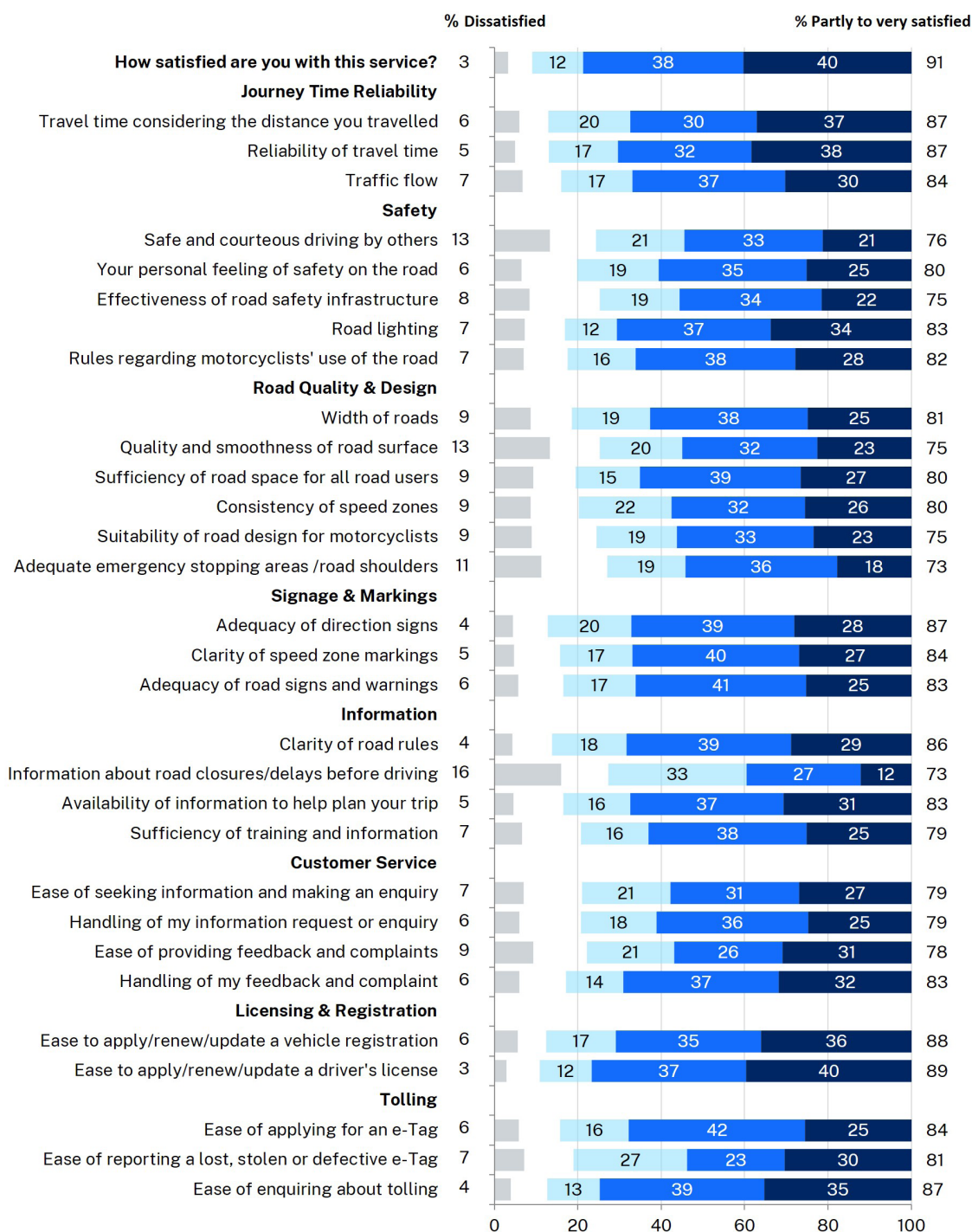
- Satisfaction with heavy vehicle trips is 66%
- Heavy vehicle users were most satisfied with Licensing & Registration
- Heavy vehicle users were least satisfied with availability and quality of rest areas and quality and smoothness of road surface

* Indicates low sample size for reporting purposes.

Dissatisfied includes individuals who responded that they were partly to very dissatisfied. The gap after dissatisfied represents a response of neither satisfied nor dissatisfied. Partly satisfied, satisfied and very satisfied are displayed independently from left to right.

Motorcycle customer satisfaction

91%
satisfied



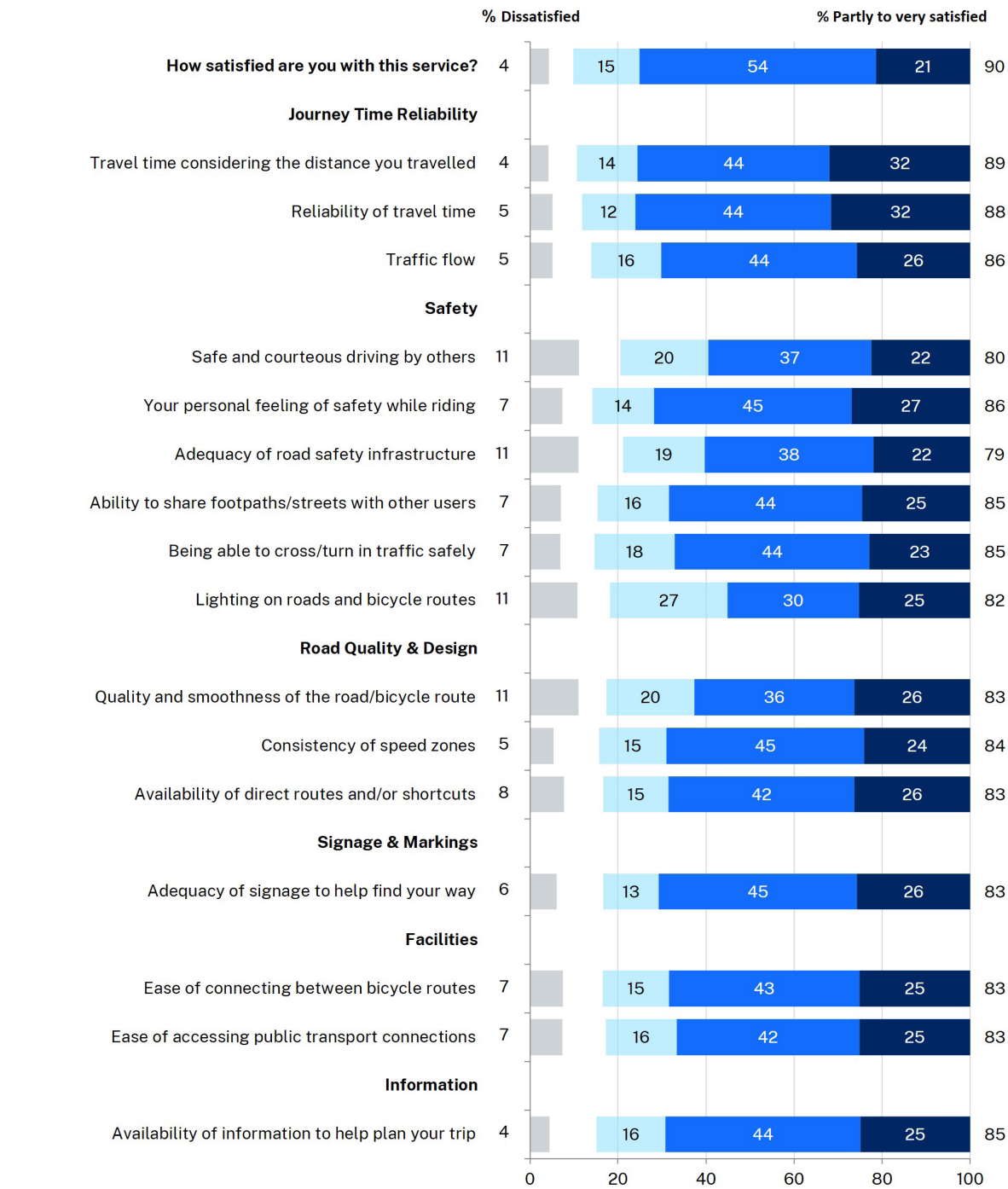
Summary

- Satisfaction among motorcycle users is 91%.
- Users were most satisfied with Licensing & Registration: including ease to apply/renew/update motorcycle licence.
- Users were least satisfied with information about road closures/delays before driving.

Dissatisfied includes individuals who responded that they were partly to very dissatisfied. The gap after dissatisfied represents a response of neither satisfied nor dissatisfied. Partly satisfied, satisfied and very satisfied are displayed independently from left to right

Bicycle customer satisfaction

90%
satisfied



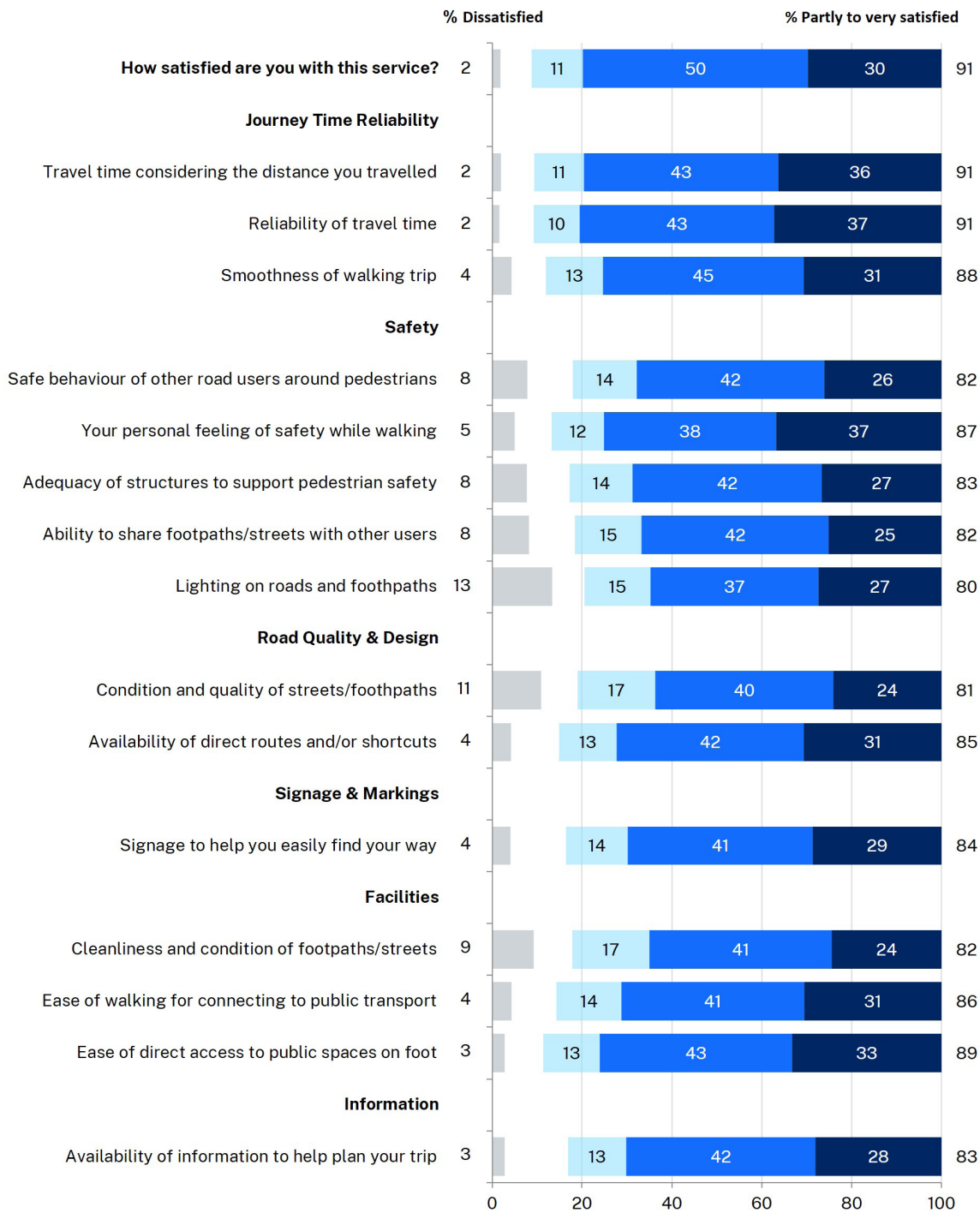
Summary

- Satisfaction with bicycle trips is 90%.
- Users were most satisfied with Journey Time Reliability: including travel time considering the distance travelled.
- Users were least satisfied with adequacy of road safety infrastructure to support cyclist safety

Dissatisfied includes individuals who responded that they were partly to very dissatisfied. The gap after dissatisfied represents a response of neither satisfied nor dissatisfied. Partly satisfied, satisfied and very satisfied are displayed independently from left to right.

Walking customer satisfaction

91%
satisfied



Summary

- Satisfaction with walking trips is 91%.
- Walkers were most satisfied with Journey Time Reliability: including reliability of travel time and travel time considering the distance travelled..
- Walkers were least satisfied with lighting on roads and footpaths

Dissatisfied includes individuals who responded that they were partly to very dissatisfied. The gap after dissatisfied represents a response of neither satisfied nor dissatisfied. Partly satisfied, satisfied and very satisfied are displayed independently from left to right.

Transport for NSW

7 Harvest Street,
Macquarie Park, NSW 2113

E: CSTMailbox_AA@transport.nsw.gov.au

transport.nsw.gov.au

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Point-to-Point Customer Satisfaction Index

November 2024



Contents

Executive summary	2
Customer satisfaction methodology	3
November 2024 results	5
Taxi network customer satisfaction	6
Rideshare customer satisfaction	7
Hire car customer satisfaction	8

Executive summary

The NSW Government’s vision is for an integrated public transport system that drives better outcomes for all people and passengers.

The Point-to-Point Customer Satisfaction Index November 2024 independently brings together the voices of almost 5,000 users, and demonstrates current satisfaction levels across point-to-point transport.

By publishing these results, Transport for NSW is enabling operators and the agency to drive accountability for continual improvement of customer outcomes across the transport network.

We will keep talking with customers about what matters to them, be accountable for our performance and in turn drive a better public transport system for all people and passengers.

The below table shows the movement in overall customer satisfaction over time:

Overall customer satisfaction									
Mode	Nov 2013	May 2019	May 2021	May 2022	Nov 2022	May 2023	Nov 2023	May 2024	Nov 2024
Taxi	82%	86%	90%	87%	86%	87%	86%	88%	89%
Rideshare	N/A	91%	93%	90%	90%	91%	92%	91%	93%
Hire Car	N/A	86%	93%	87%	88%	88%	89%	86%	89%

Customer satisfaction methodology

Background

Starting in May 2017, Transport for NSW began conducting surveys each year to measure customer satisfaction levels across NSW Point-to-Point transport, including Taxi, Rideshare and Hire Car customers. Prior to this, Taxi customers were surveyed. We will continue to survey passengers and people each year to help us drive improvement.

The survey was designed by Transport for NSW to ensure that it measured the service attributes that customers value the most. The division used customer research to determine what drives customer satisfaction levels across the various modes. This information was then used to design the questions in the surveys. The results present what customers value most, focusing on the top customer service priorities including timeliness, safety and customer service.

The Point-to-Point Customer Satisfaction Index November 2024 includes responses from more than 5,000 users across three modes: taxi, rideshare and hire car.

Scale

The survey uses a seven-point scale in order to differentiate levels of satisfaction as shown below. The top three ratings together are defined as satisfied and the bottom three ratings together are defined as dissatisfied.

Dissatisfied				Satisfied		
1	2	3	4	5	6	7
Very Dissatisfied	Dissatisfied	Partly Dissatisfied	Neither Satisfied nor Dissatisfied	Partly Satisfied	Satisfied	Very Satisfied

Survey methodology

The surveys use stratified and simple random samples according to a sampling frame. Individual sampling frames have been constructed for each of the individual modal surveys (Taxi, Rideshare, and Hire Car) to achieve a sample that is statistically representative of the population of the users of the service and is achievable during the in-field period based on known incidence rates in previous surveys.

Sampling and sample sizes set for each of Point-to-Point modes aims to achieve a Margin of Error (MoE) of less than +/-5% with 95% confidence interval for each service overall. Post weighting may then be used to re-align distributions to be representative of the population.

Transport users were surveyed regarding their most recent experience by means of an online questionnaire. Transport users were recruited via an online panel and emailed invitations to participate in the survey. Response rates were monitored on a daily basis and were used to determine number of reminders sent to panel members. Survey data is weighted based on panel and internal KPI statistics.

Customer satisfaction methodology

Eligibility

Individuals over 18 years of age were eligible to complete the survey if they had recently travelled using Taxi, Rideshare and Hire Car (within last 6 months) and their home postcode was within the greater metropolitan area including Sydney, Newcastle, Central Coast and Wollongong.

Notes about the customer satisfaction results in this report

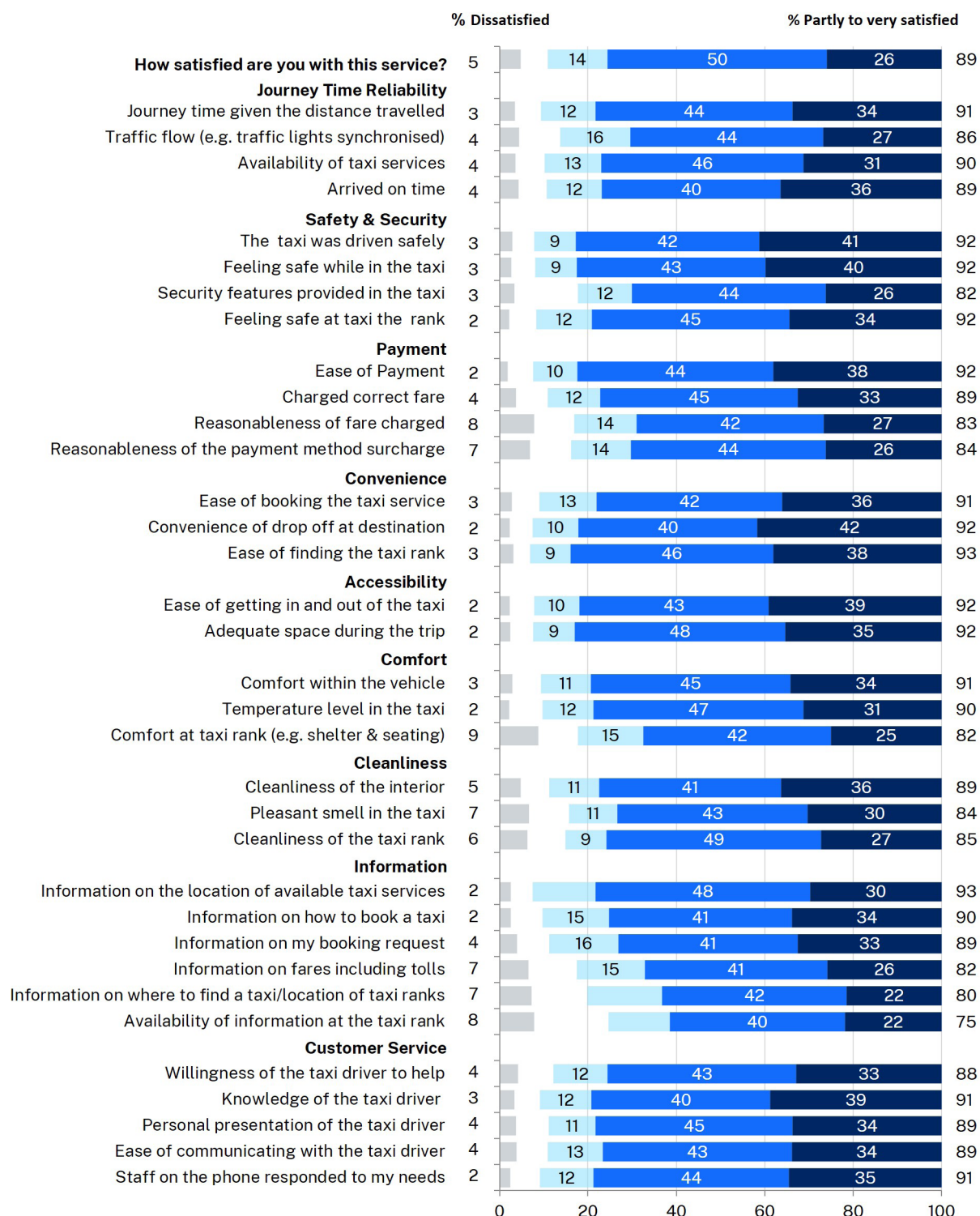
The reported variance between some results across time periods may differ from the variance between the whole number results due to rounding.



November 2024 results

Urban taxi network customer satisfaction

89%
satisfied



Summary

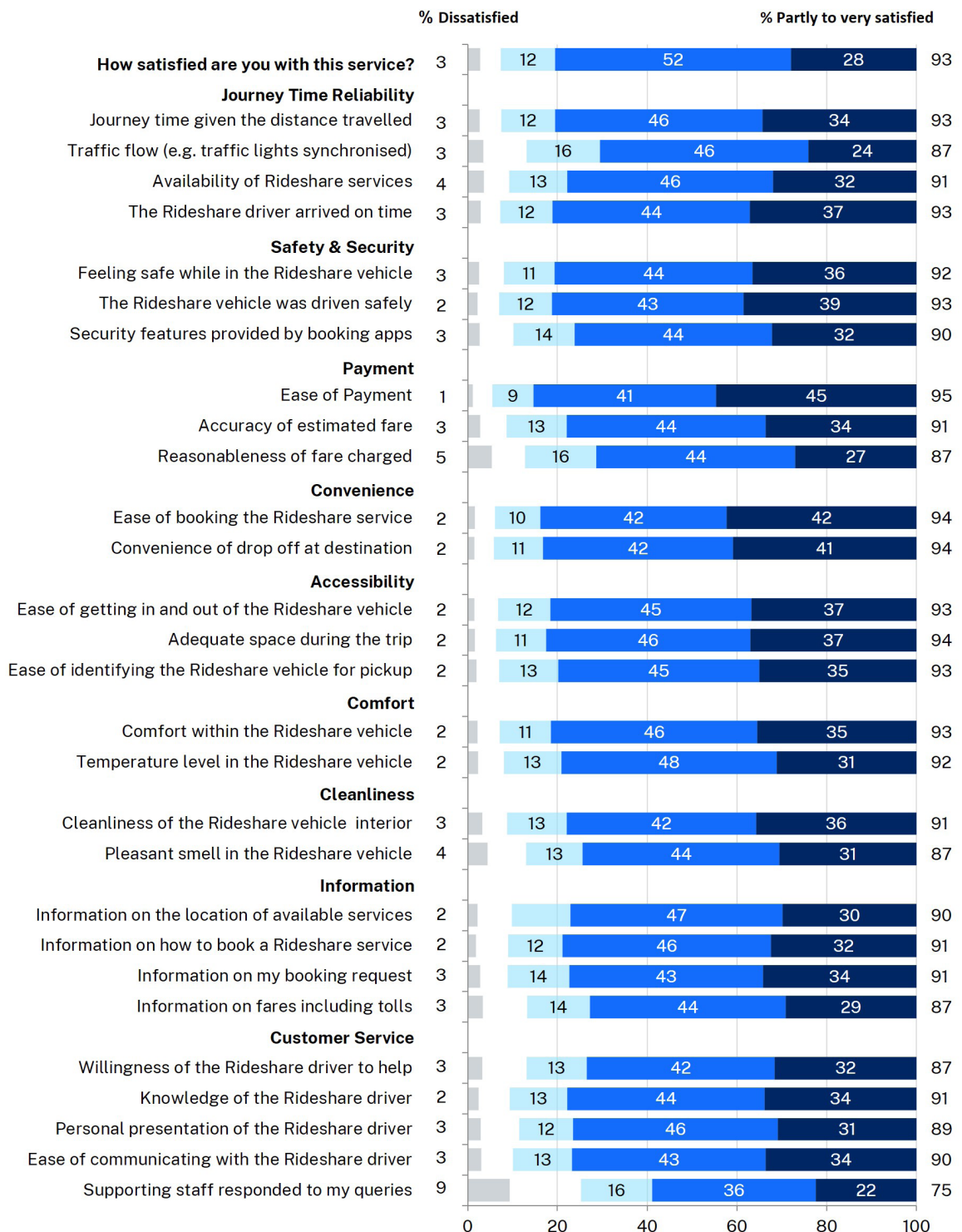
- Satisfaction with Taxi services is 89%.
- Taxi users were most satisfied with Accessibility.
- Taxi users were least satisfied with Information: including availability of information at taxi rank.

Dissatisfied includes individuals who responded that they were partly to very dissatisfied. The gap after dissatisfied represents a response of neither satisfied nor dissatisfied. Partly satisfied, satisfied and very satisfied are displayed independently from left to right.

Rideshare customer satisfaction

93%

satisfied



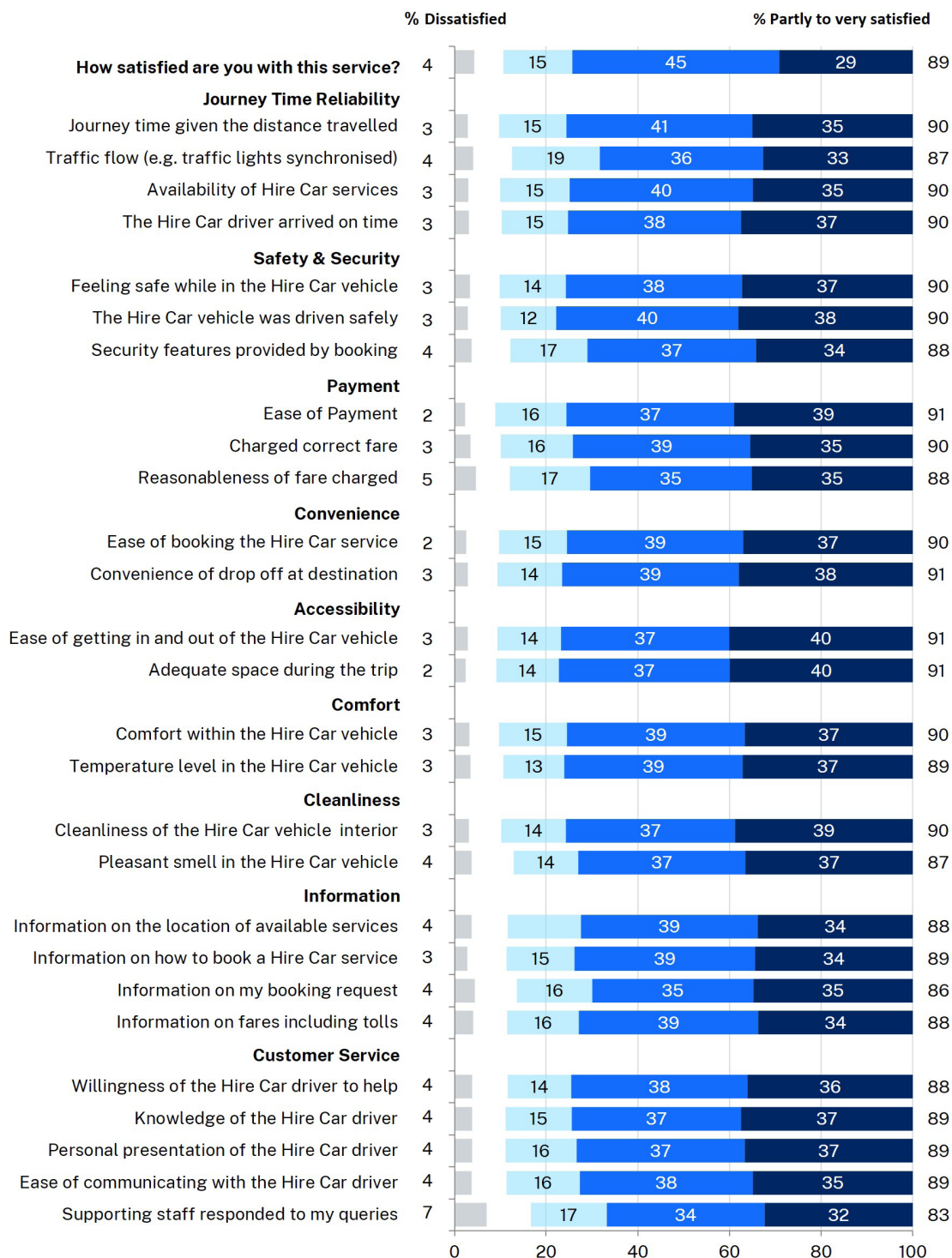
Summary

- Satisfaction with rideshare services is 93%.
- Rideshare users were most satisfied with Convenience.
- Rideshare users were least satisfied with Customer Service.

Dissatisfied includes individuals who responded that they were partly to very dissatisfied. The gap after dissatisfied represents a response of neither satisfied nor dissatisfied. Partly satisfied, satisfied and very satisfied are displayed independently from left to right.

Hire car customer satisfaction

89%
satisfied



Summary

- Satisfaction with Hire Car services is 89%.
- Hire Car users were most satisfied with Accessibility.
- Hire Car users were least satisfied with Information and Customer Service.

Dissatisfied includes individuals who responded that they were partly to very dissatisfied. The gap after dissatisfied represents a response of neither satisfied nor dissatisfied. Partly satisfied, satisfied and very satisfied are displayed independently from left to right

Transport for NSW

7 Harvest Street,
Macquarie Park, NSW 2113

E: CSTMailbox_AAI@transport.nsw.gov.au

transport.nsw.gov.au

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