

OPAL FARES
2020-2024
SERVICES AND USE

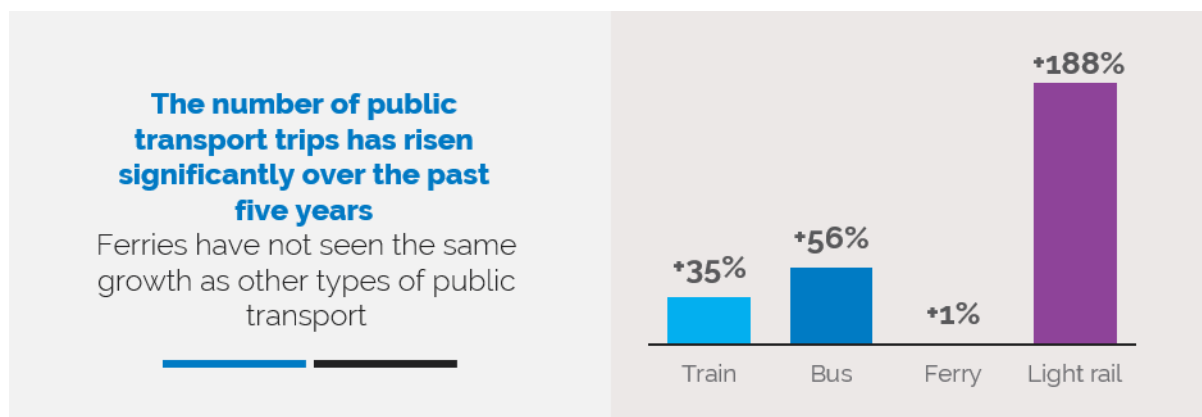


Since recovering from the economic and employment slowdown of the GFC 10 years ago, public transport use is now growing at a faster rate than general population growth. It is an ongoing challenge for the Government to accommodate this growing demand, while maintaining customer satisfaction and service levels, as they work within the constraints of networks that are operating close to capacity. This paper explores how demand for public transport has changed and been accommodated, and what impact this has had on service levels and customer satisfaction.

Public transport use is growing faster than the population

Over the past five years, the number of trips made on trains, buses and light rail services has increased substantially, with all public transport trips across all modes growing by an average of 7% per year.¹ These increases are substantially higher than the rate of population growth in Greater Sydney of around 2% per year.²

The largest growth occurred on light rail services, where the number of trips rose by 188%. Growth in bus and train use was lower, but also significantly above the rate of population growth. The number of ferry trips has changed very little.



The number of bus and light rail services have increased to accommodate additional demand

The Government has invested in more bus and light rail services in recent years, adding over 20,000 extra bus services across the Sydney metropolitan bus regions since 2016.³ On the Inner West light rail, the number of services increased by around 20% on weekdays and Saturdays between 1 July 2015 and 30 June 2018.⁴

¹ Information provided to IPART by TfNSW, May 2019. This includes non-Opal trips, regional patronage and estimates of non-ticketed travel, such as school students, veterans and passengers with certain disabilities.

² Australian Bureau of Statistics, *3218.0 Regional Population Growth, Estimated Resident Population - Greater Capital City Statistical Areas* 30 June 2014 and 30 June 2018. Average annual growth over the four year period.

³ Information provided to IPART by TfNSW, May 2019.

⁴ Information provided to IPART by TfNSW, May 2019.

Our analysis suggests that while most bus and light rail services still have room for more passengers, some routes are at or close to capacity and will require additional services to meet demand. Some Inner West light rail services are currently around 80% full.⁵ While they may be able to accommodate additional passengers, passengers on these services may already feel crowded at this level of use.⁶ In TfNSW's Customer Satisfaction Index 2019, light rail customers identified not being able to get a seat and not having enough personal space as the greatest causes of dissatisfaction with the service.

For bus services, the B1 route from Mona Vale to Wynyard, the M30 from Taronga Zoo to Sydenham and the T80 from Liverpool to Parramatta now have buses at maximum capacity.⁷

The Government has plans for additional bus services to meet increasing demand, which may ease crowding on these services.⁸ As well as being more comfortable for passengers, putting on extra services has the added benefit of reducing waiting time, and as a result overall travel times, for passengers.



Some bus and light rail services are crowded during peak hours
this may be impacting customer satisfaction.

The number of train services has not kept up with the increase in trips

In November 2017, the Government undertook a major revision of train timetables to add almost 1,500 extra weekly services, increasing capacity on the T1 Western, T2 Inner West and Leppington, T3 Bankstown, T5 Cumberland, and T8 Airport and South lines. A key element was providing additional peak hour express services between Parramatta and the City and the full integration of the South West Rail Link into the network. This resulted in around 89% of suburban peak hour customers having access to 'turn up and go' services, with around 70% of suburban customers receiving a minimum 15 minute frequency across the rest of the day.⁹

However, as rail services have improved, this has created additional customer demand. There is now limited capacity to put on more train services because of constraints on the existing network, particularly through the Sydney CBD.¹⁰

We analysed Opal data to put together a picture of the current capacity of train services. We found that during the weekday morning peak periods, a number of services going into the

⁵ Maximum capacity for light rail services is defined as 80 people seated and 206 people standing.

⁶ 80% full means that all seats are occupied and around 150 people are standing.

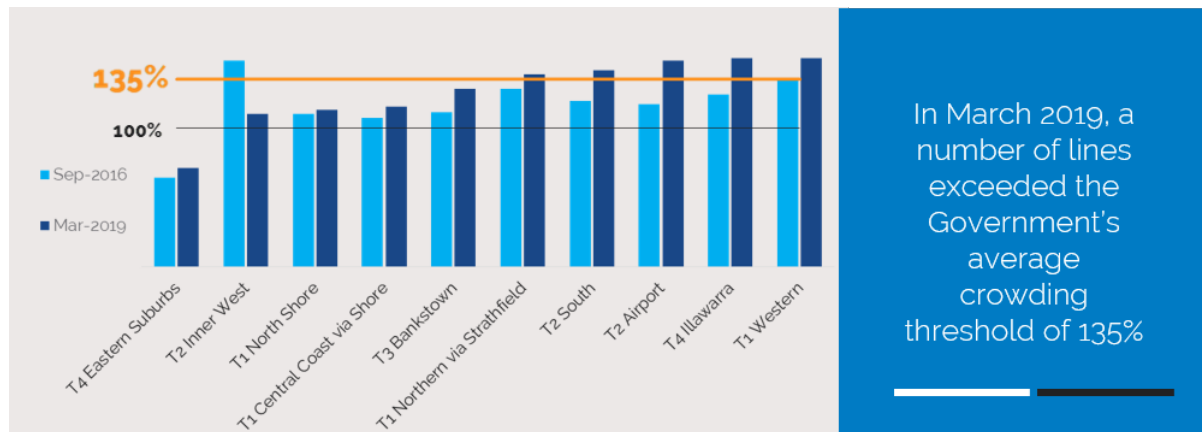
⁷ Maximum passenger capacity depends on the type of bus and ranges from a combined seating and standing capacity of 65 up to 110 for articulated two or three-door buses.

⁸ See <https://nsw.liberal.org.au/Shared-Content/News/2019/communities-to-get-thousands-of-extra-bus-services>, accessed November 2019

⁹ NSW Government, *Customer Outcomes More Trains, More Services Stage 1 November 2017 Timetable – Technical Report*, November 2018, p 1.

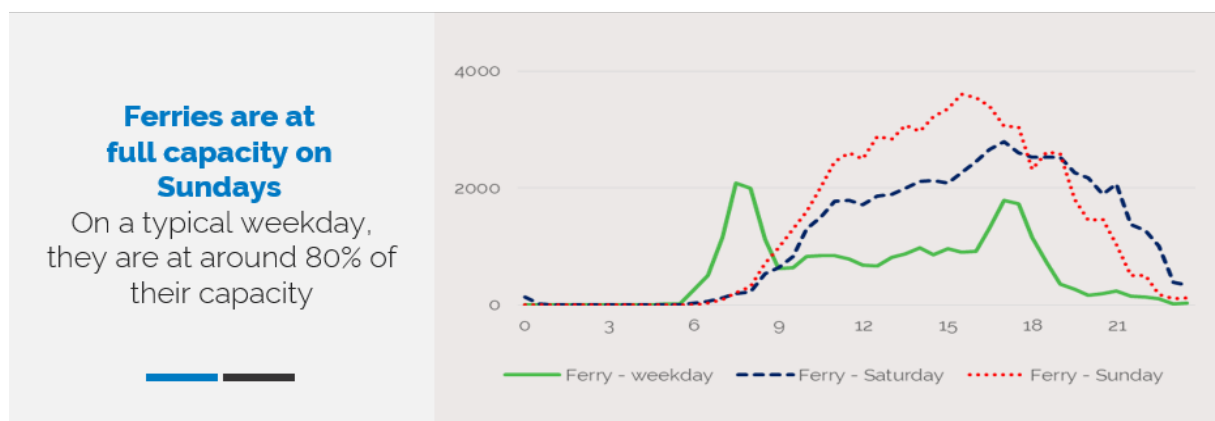
¹⁰ Ibid, p 2.

CBD, including the T1 Western line (from Strathfield), T4 Illawarra/Cronulla line (from Hurstville), T2 Airport line, T5 Cumberland (Southwest) and the T1 Northern lines are particularly full with load factors in excess of 135% of seat capacity (all seats taken and around 30 people standing in each carriage).¹¹



Peak ferry use occurs on Sundays

For ferries we observed capacity of up to 80%¹² on services with relatively higher demand such as the F3 Parramatta River and F1 Manly services and so there is capacity to cater for additional demand in the short term (however, we note that services are up to full capacity on Sundays for these services).



In a typical week, 96% of passengers use reloadable Opal cards to pay for their journeys, with almost 3% now using contactless payments and 1% purchasing single trip tickets.

¹¹ Information provided to IPART by TfNSW, May 2019. Load factors are a percentage of seat availability. For example, if a carriage has seat capacity of 122, then a load factor of 135% would mean that every seat is occupied and that 30 people are also standing.

¹² Capacities differ between services depending on the fleet used. The fleet used for the F1 Manly service has a passenger capacity of 1,100 whereas the F3 Parramatta River service has passenger capacity of 230. https://en.wikipedia.org/wiki/List_of_Sydney_Ferries_vessels, accessed 24 September 2019.

Opal trip characteristics

We analysed Opal data to find out how different categories of Opal card users (adult, senior, concession and child) travel in a typical week.¹³

A majority of passengers use reloadable Opal cards

Product Type	Fare Type	Weekly spend
Reloadable	Adult	\$20
Contactless	Adult	\$9
Single Trip Ticket	Adult	\$8
Reloadable	Child/Youth	\$4
Single Trip Ticket	Child/Youth	\$2
Reloadable	Concession	\$10
Reloadable	Senior/Pensioner	\$5
Total		\$15

Reloadable adult Opal cards have the highest average weekly spend

In a typical week, the average weekly spend on a reloadable adult card is \$20, while other Opal card users tend to spend less on public transport.

Train is the most commonly used mode

However, senior Opal card users make more trips by bus (43% compared to 38% by train), while children make equal numbers of trips by bus and train (43%).



¹³ This is not a school holiday week, or a week with a public holiday.

Almost a third of adult and concession Opal users benefit from transfer discounts


85%

of all journeys in a typical week are **single mode**, while 15% are **multi-mode**


29%

of adult and concession Opal users receive a **transfer discount** in a typical week

Bus-train journeys are the most common multi-mode journey
They account for 13% of all journeys in a typical week



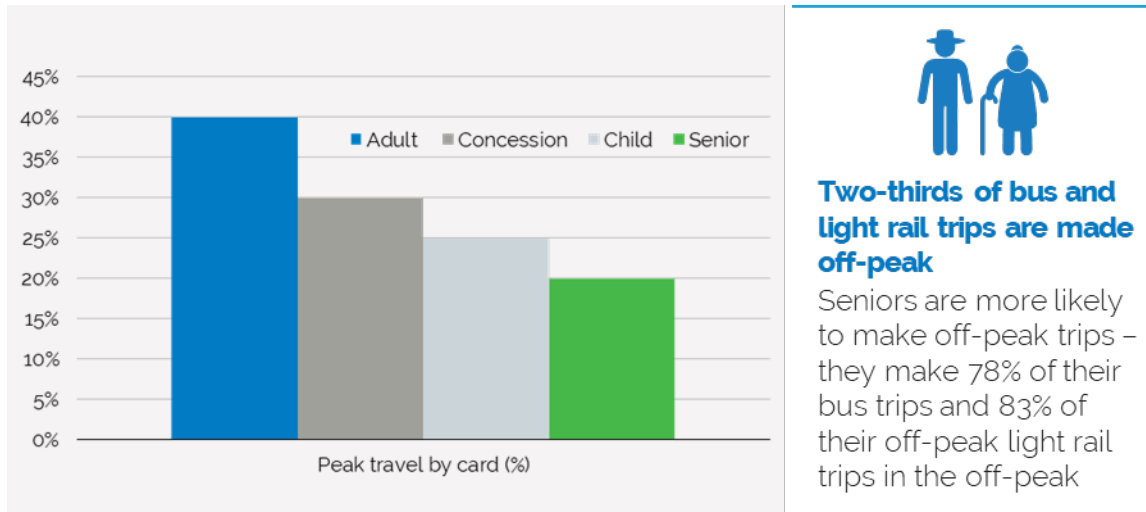
Seniors and concession users
are more likely to make multi-modal journeys



Passengers that travel frequently
are more likely to make multi-modal journeys

Less than half of all trips are made in the peak

Adult Opal card users are more likely to travel during the peak than other passengers. Only 20% of all seniors' trips are made in the peak.



Around half of all passengers travel more than twice a week

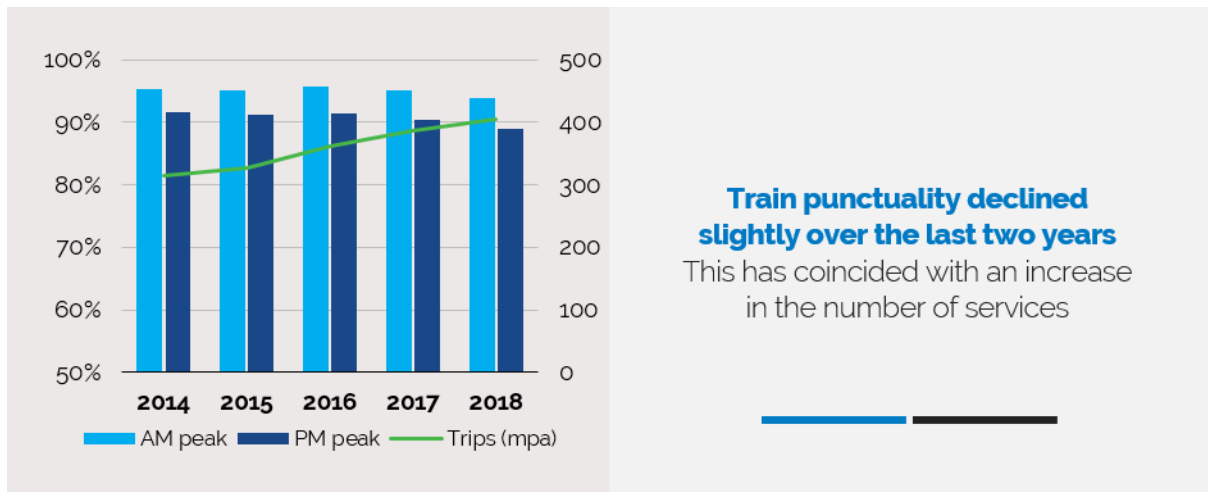
Around 52% of adults and 63% of concession card users travel more than twice a week, with 29% of adult and 27% of concession holders travelling 5 times a week or more. A majority of senior and child card users travel only one or two days per week (66% of seniors and 80% of children). Only 13% of seniors and 7% of children travel 5 times a week or more.

Around 28% of adult and concession Opal users receive the weekly travel reward in a standard week (ie, half price fares after the 8th journey), and 4% reach the \$50 weekly cap (\$25 for concession holders). Many customers spend less than the weekly cap because of the travel rewards and daily caps. Without these, 10% of these passengers would reach the \$50/\$25 weekly cap.



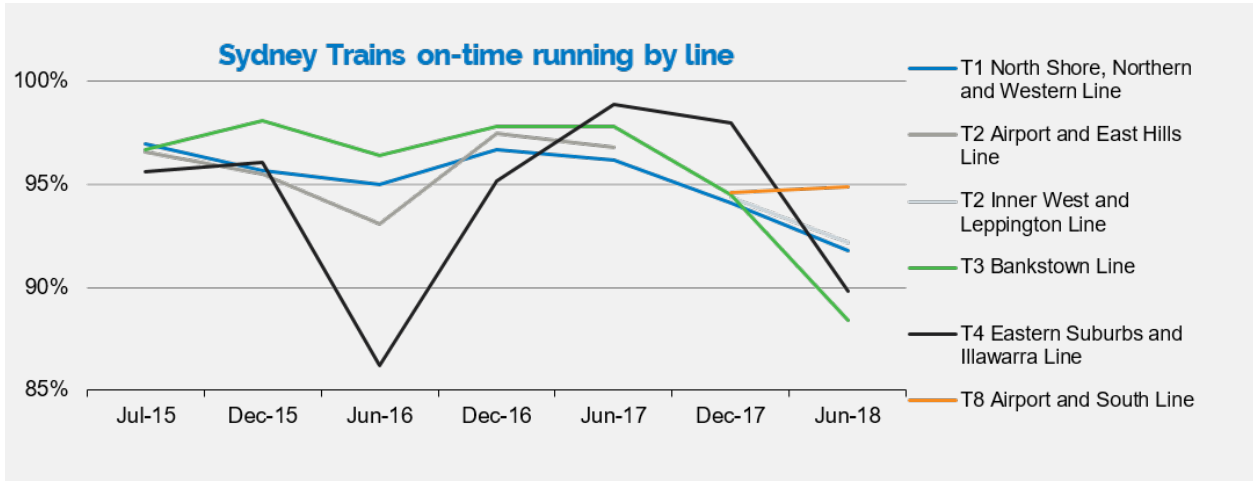
Note: The Opal daily caps are currently \$16.10 for adults, \$8 for concession and children and \$2.50 for seniors.

On-time remains high for all services

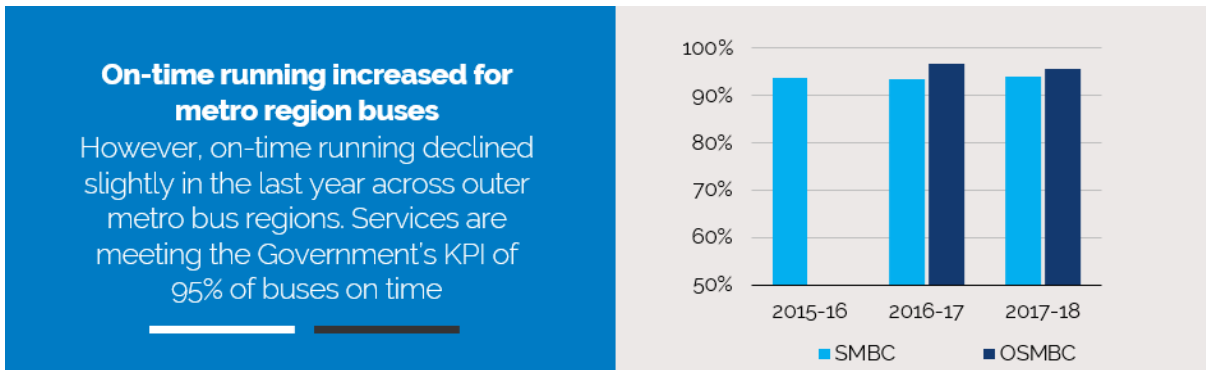


Note: A train is punctual if it stops at the station it was listed to stop in the timetable (ie, no skipped stops), and it arrived at its destination no later than its arrival time as listed in the timetable, plus an on-time tolerance(5 minutes for suburban services and 6 minutes for intercity services).

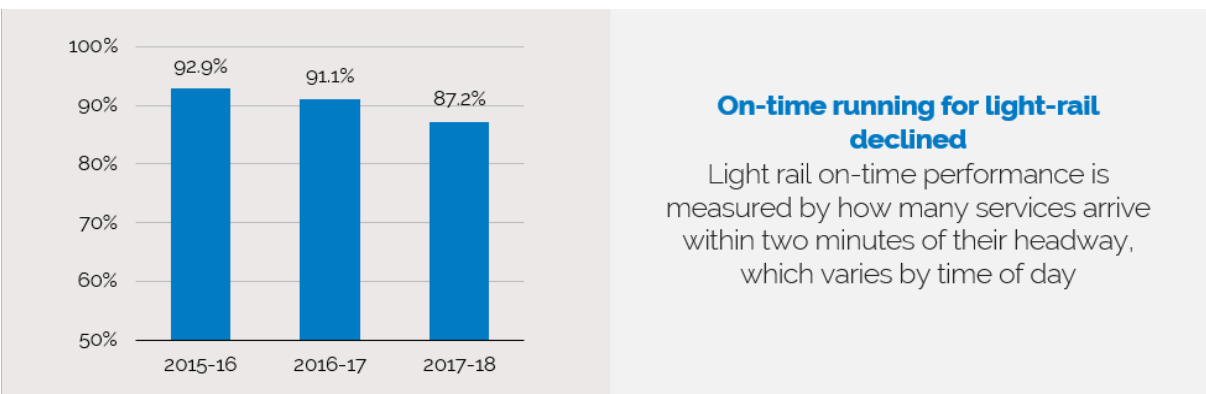
The decline in on-time running affected most lines, with almost all experiencing declines since around June 2017.



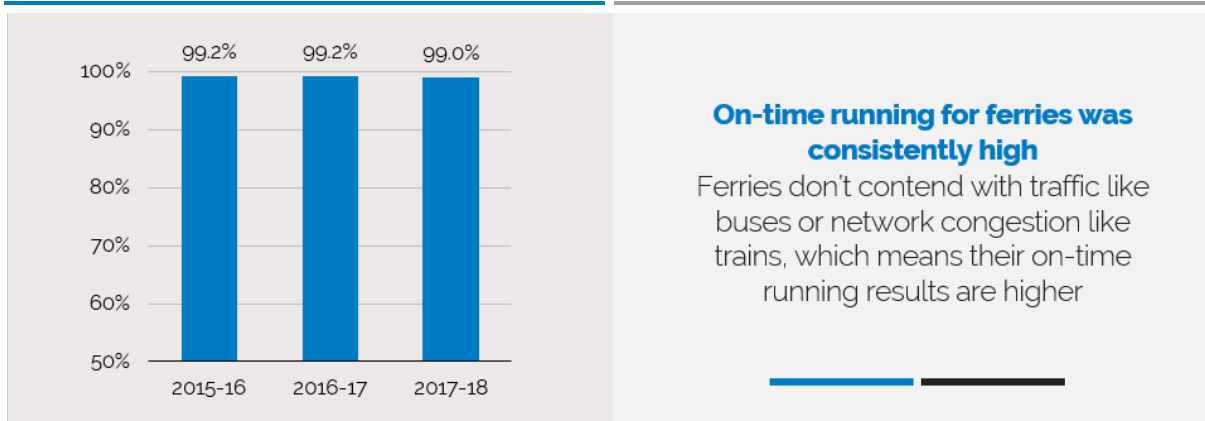
Note: Light rail services do not run to a timetable, rather they are scheduled to arrive every eight minutes in the peak, 12 minutes in the inter-peak, 15 minutes in off-peak and 30 minutes late at night.



Note: Until June 2017, Transport for NSW monitored on-time running through monthly surveys conducted over a sample period at the start of the trip. As of July 2017, the Public Transport Information and Priority System (PTIPS) replaced manual surveys as the source of information for these on-time running results.



Note: Light rail services do not run to a timetable, rather they are scheduled to arrive every eight minutes in the peak, 12 minutes in the inter-peak, 15 minutes in off-peak and 30 minutes late at night.



Customer satisfaction is generally high for all modes of transport

Each year, the Customer Satisfaction Index publishes the results of its survey of around 15,000 customers about their satisfaction with modes of transport.

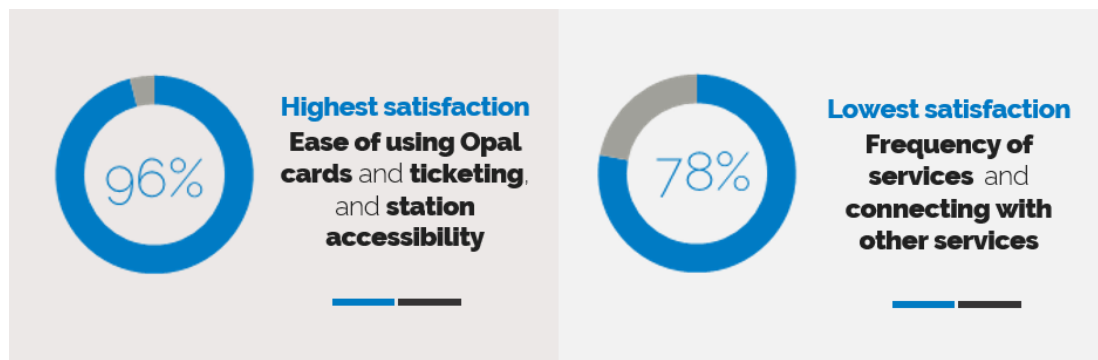


Data source: TfNSW, Customer Satisfaction index, May 2019.

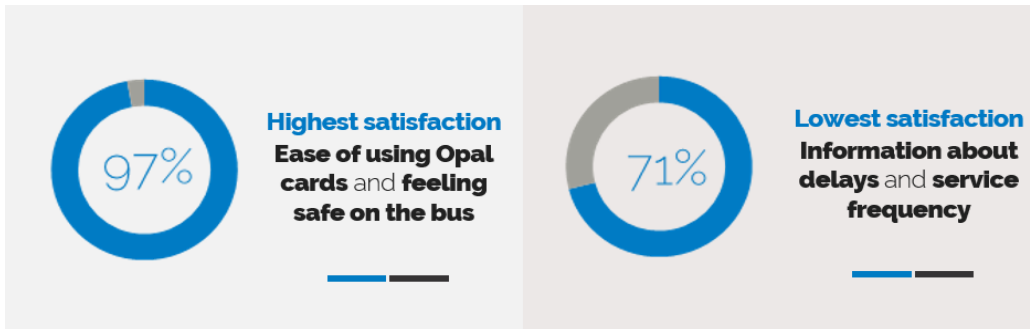
Across all modes, customers were most satisfied with **ticketing, safety** and **stop information**, but were least satisfied with **frequency, connections with other services** and **information about delays**.

Rail service satisfaction increased to 89% from 86% in 2018

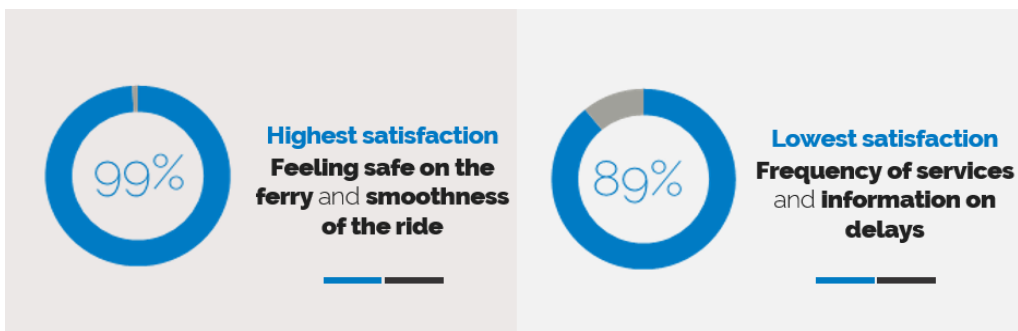
While overall satisfaction with train services was high, it was the lowest of all modes. In particular, the T6 Carlingford line scored the lowest levels of 68% satisfaction, with 46% satisfaction with service frequency and 66% satisfaction with connections to other services. The Hunter line was the highest with 95% satisfaction overall.



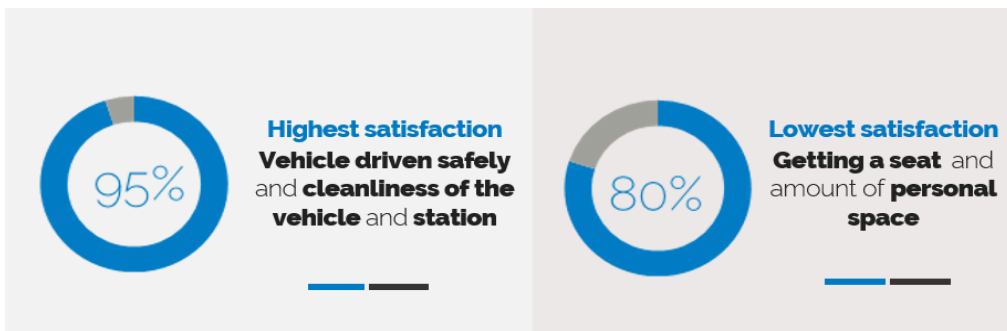
Bus satisfaction increased to 91% from 89% in 2018



Ferries ranked highly in satisfaction for all aspects



Light rail customers were most concerned about personal comfort



The metro ranked 94% for overall satisfaction

