

Transport
for NSW

Customer Satisfaction Index

November 2022



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Contents

Executive summary	3
Customer satisfaction methodology	4
November 2022 results	6
Overall train network	7
Overall bus regions	8
Overall ferry routes	9
Overall light rail	10
Overall Metro	11

Executive summary

The NSW Government's vision is for an integrated public transport system that drives better outcomes for all customers.

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

The Customer Satisfaction Index November 2022 independently brings together the voices of almost 9,300 customers, and demonstrates current satisfaction levels across all public transport.

By publishing these results, TfNSW 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 customers.

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

Overall customer satisfaction

Mode	Nov 2012	Nov 2018	May 2019	Nov 2019	Nov 2020	May 2021	May 2022	Nov 2022
Overall train network	79%	86%	89%	90%	94%	93%	92%	85%
Overall bus regions	79%	90%	91%	91%	94%	93%	92%	89%
Overall ferry routes	94%	98%	98%	98%	99%	99%	98%*	98%
Overall light rail	91%	92%	91%	90%	96%	93%	93%	91%
Overall metro	N/A	N/A	95%	96%	99%	98%	98%	97%

*Results for Ferry includes both Sydney Ferries and Newcastle (Stockton) Ferry networks. The Newcastle (Stockton) ferry was first included in May 2022 and subsequent periods.

Customer satisfaction methodology

Background

Transport for NSW has conducted surveys each year to measure customer satisfaction levels across the NSW public transport system.

In the last report, we reported on satisfaction from May 2022. In this report, we look at data from our November 2022 survey.

We will continue to survey customers each year to help us drive improvements.

The survey was designed by the Customer Strategy and Technology of 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 nine customer service priorities including timeliness, safety & security and comfort.

The Customer Satisfaction Index November 2022 includes responses from almost 9,300 customers 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 customer's opinions. Firstly, services were randomly selected by surveyors to meet quotas and secondly, customers on board those services were randomly selected by surveyors. In order to reduce sampling error, maximums were placed on the number of customers to be sampled within each vehicle, at 40 customers for train, bus, light rail and metro and 100 customers 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, customers were asked about their experience of their current trip or most recent experience. Where customers 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

Customers 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. Customers include all users of the NSW train, bus, ferry, metro and light rail network, including local residents, interstate customers and overseas visitors.

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

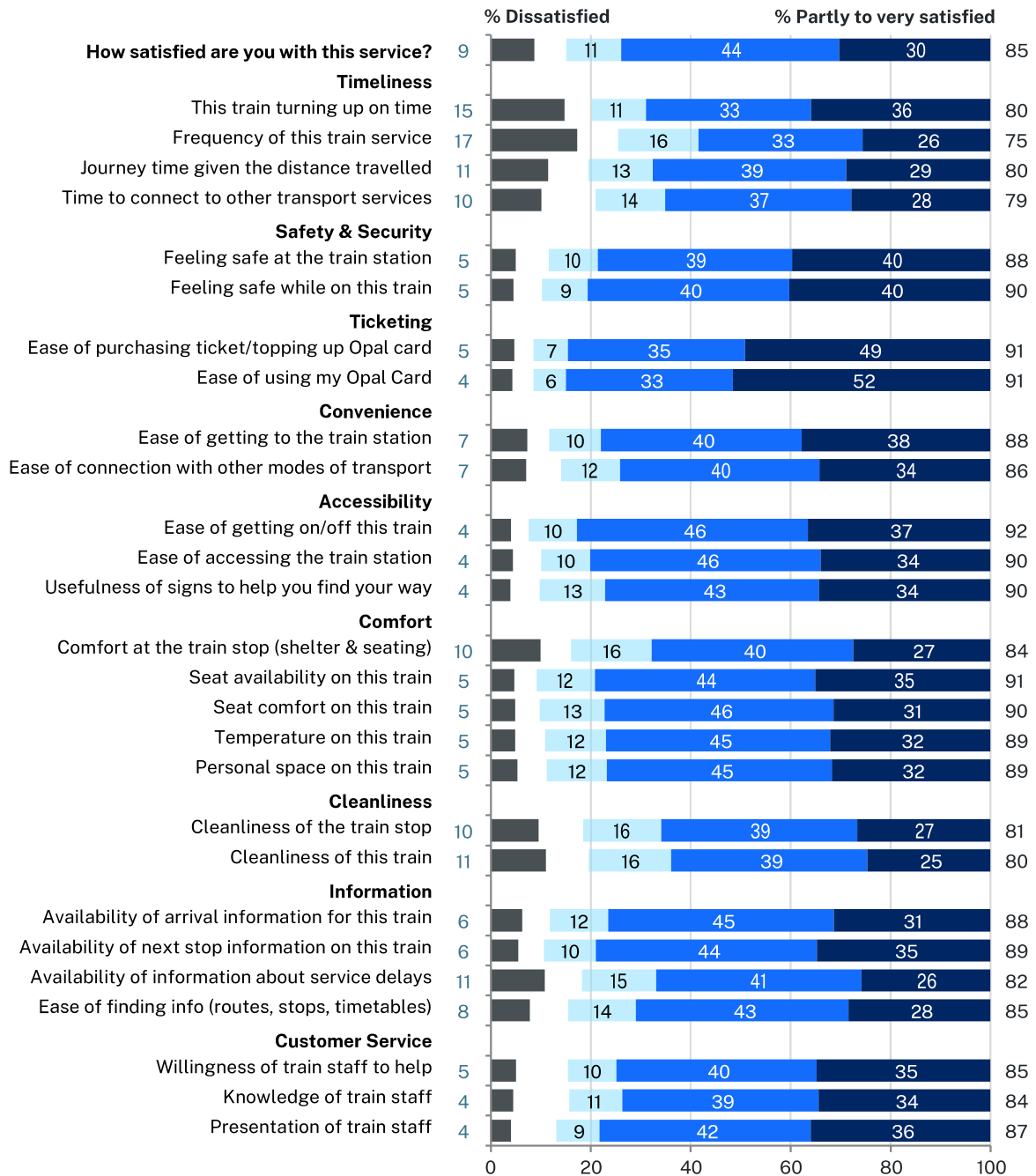
Notes about the customer satisfaction results in this report

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

November 2022 results

85%
satisfied

Overall train network customer satisfaction



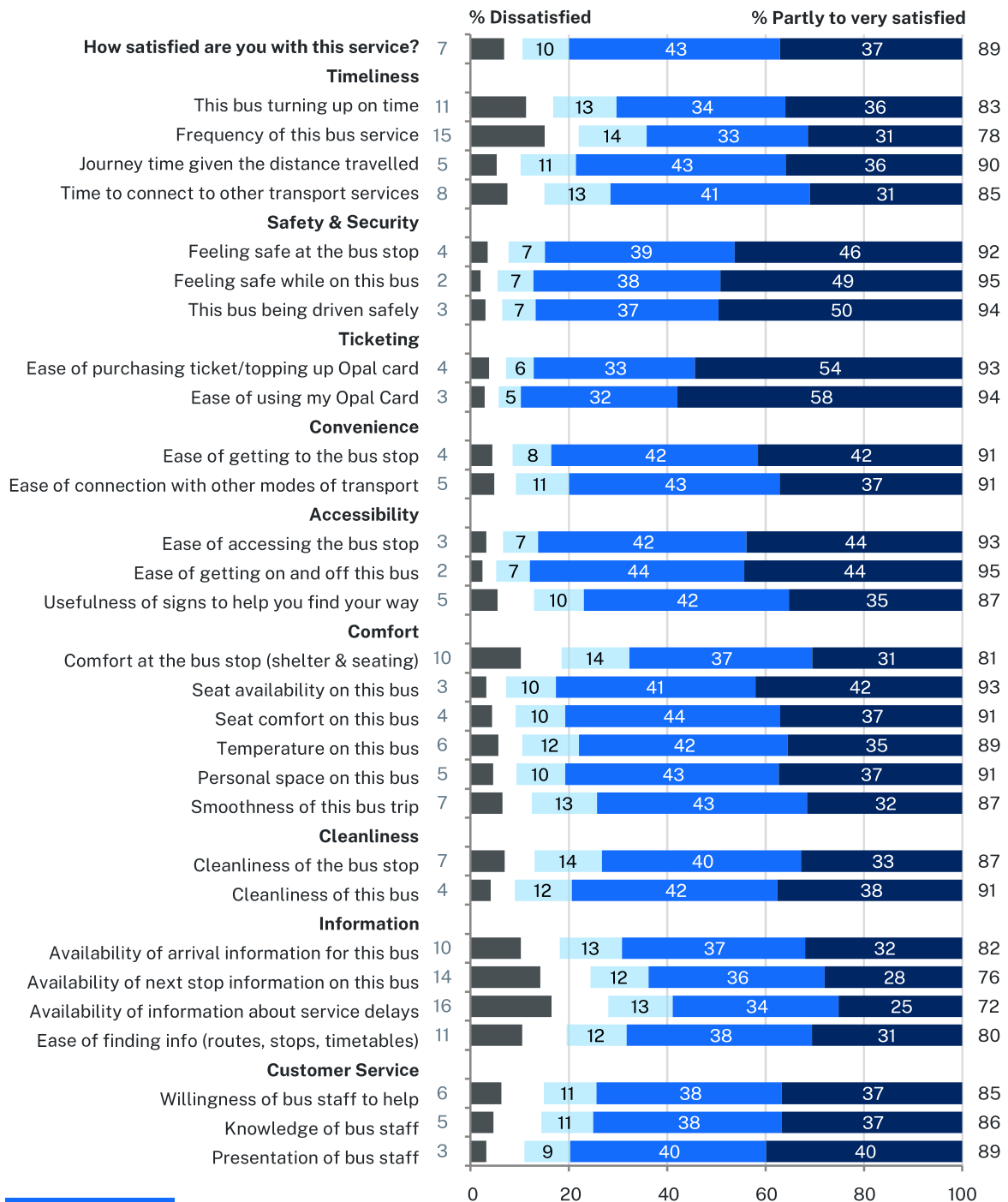
Summary

- Satisfaction with the train network has declined to 85%
- Customers were most satisfied with Ticketing, and Accessibility and Comfort, including: ease of getting on/off the train
- Customers were least satisfied with Timeliness; including frequency of train service.

Dissatisfied includes customers 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.

89%
satisfied

Overall bus regions customer satisfaction



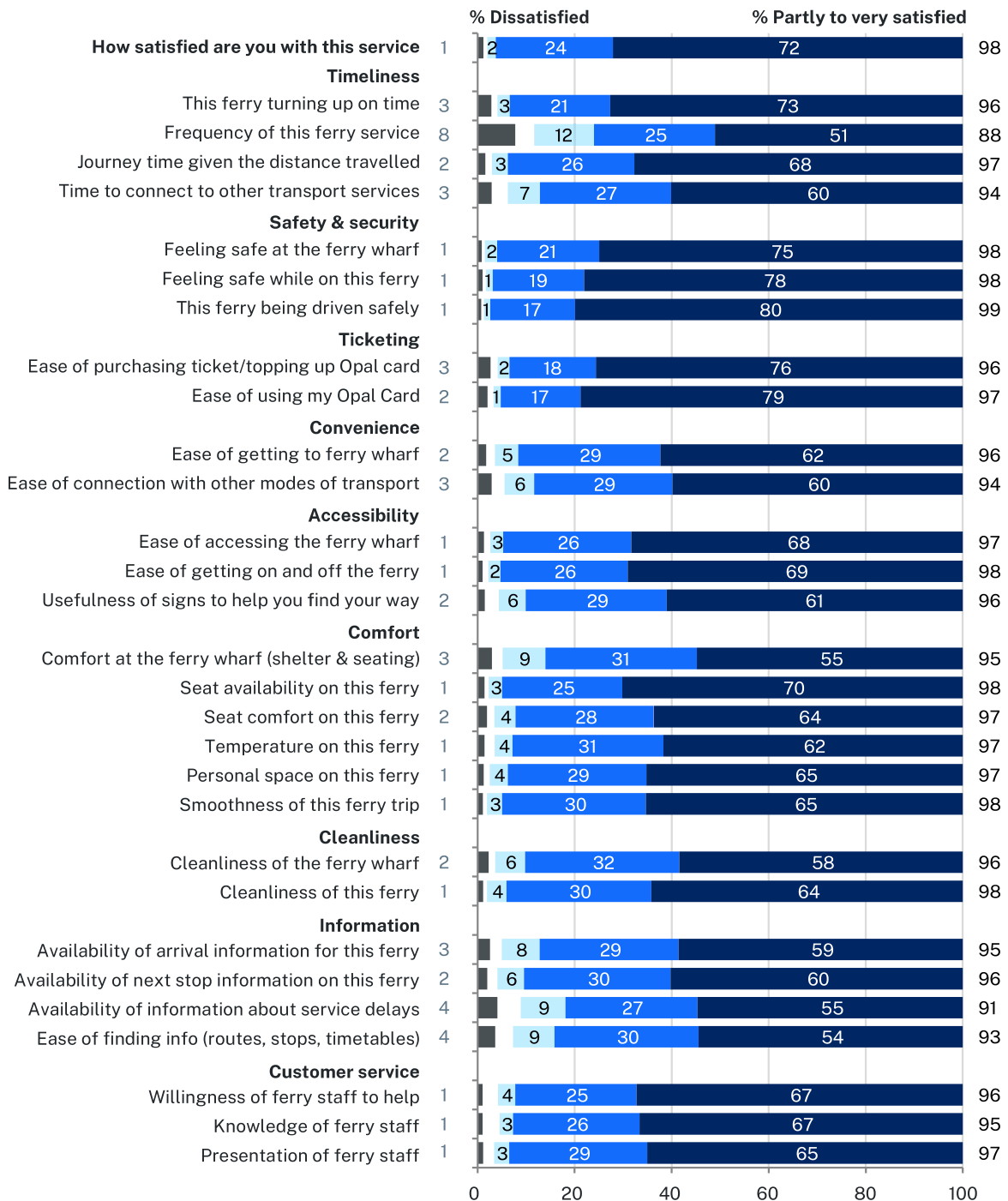
Summary

- Satisfaction with the bus network is 89%
- Customers were most satisfied with Ticketing and Safety & Security, including: feeling safe while on this bus and bus being driven safely.
- Customers were least satisfied with availability of information about service delays.

Dissatisfied includes customers 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.

98%
satisfied

Overall ferry routes customer satisfaction



Summary

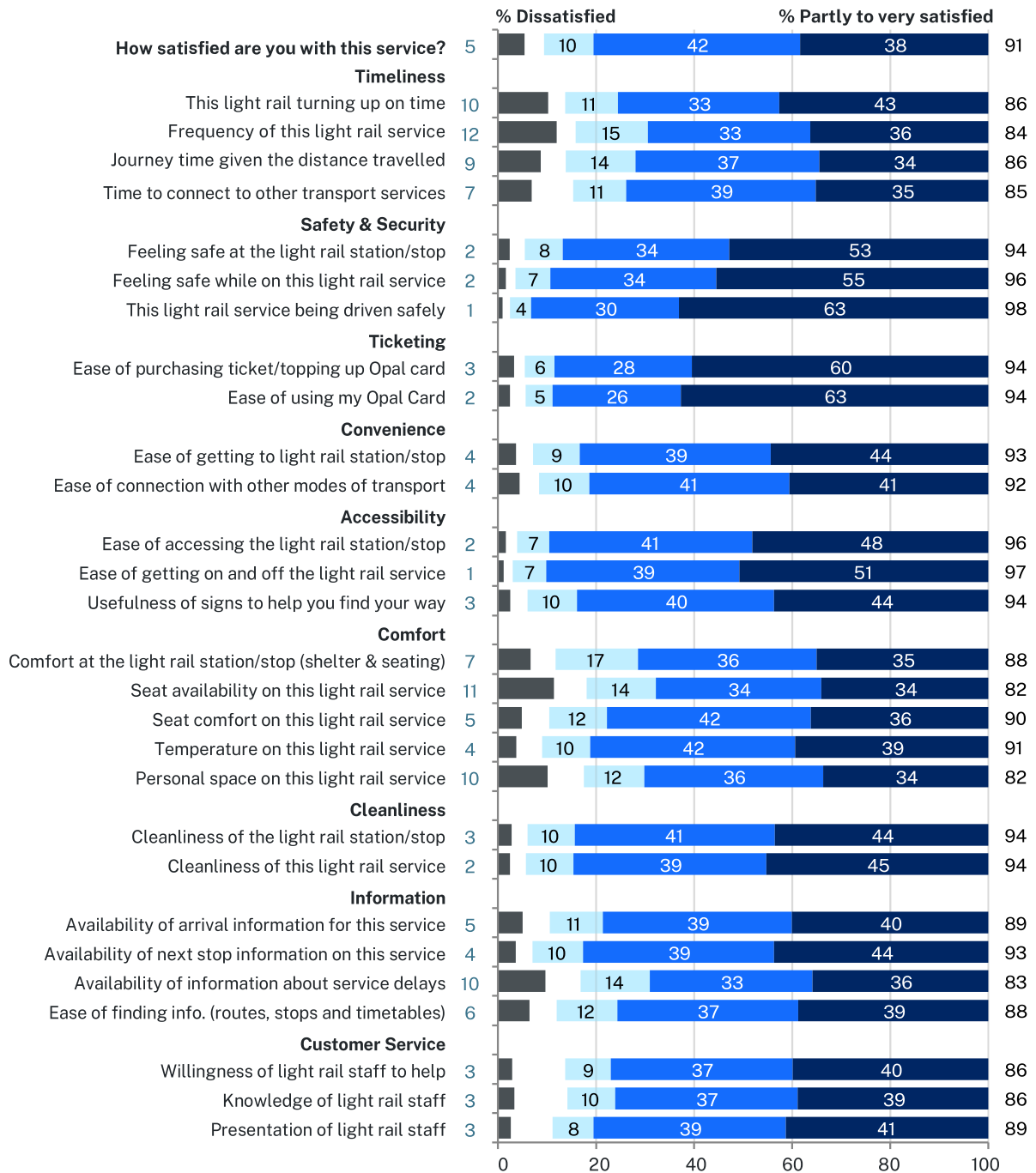
- Satisfaction with the ferry network remains high at 98%
- Customers were most satisfied with Safety & Security, including; feeling that the ferry was being driven safely
- Customers were least satisfied with the frequency of the ferry service

*Includes Sydney ferries and Newcastle-Stockton ferry

Dissatisfied includes customers 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

91%
satisfied

Overall light rail customer satisfaction



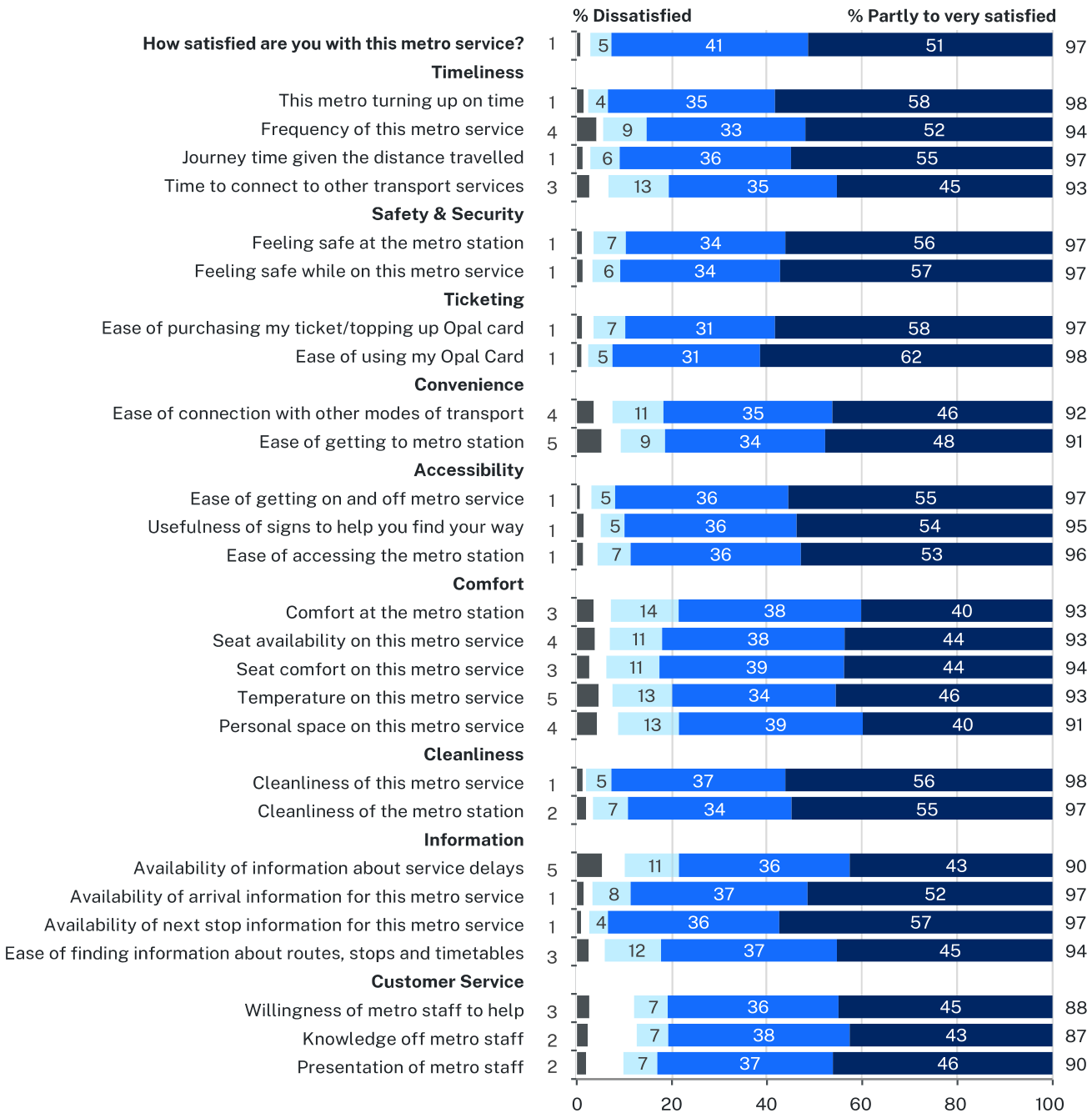
Summary

- Satisfaction with light rail remains high at 91%
- Customers were most satisfied with Safety & Security and Accessibility, including: light rail service being driven safely
- Customers were least satisfied with seat availability on the light rail service and personal space

Dissatisfied includes customers 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

97%
satisfied

Overall metro customer satisfaction



Summary

- Satisfaction on the Metro service remains high at 97%
- Metro customers were most satisfied with Safety & Security, Cleanliness and Ticketing
- Customers were least satisfied with knowledge of metro staff and their willingness to help.

Dissatisfied includes customers 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.

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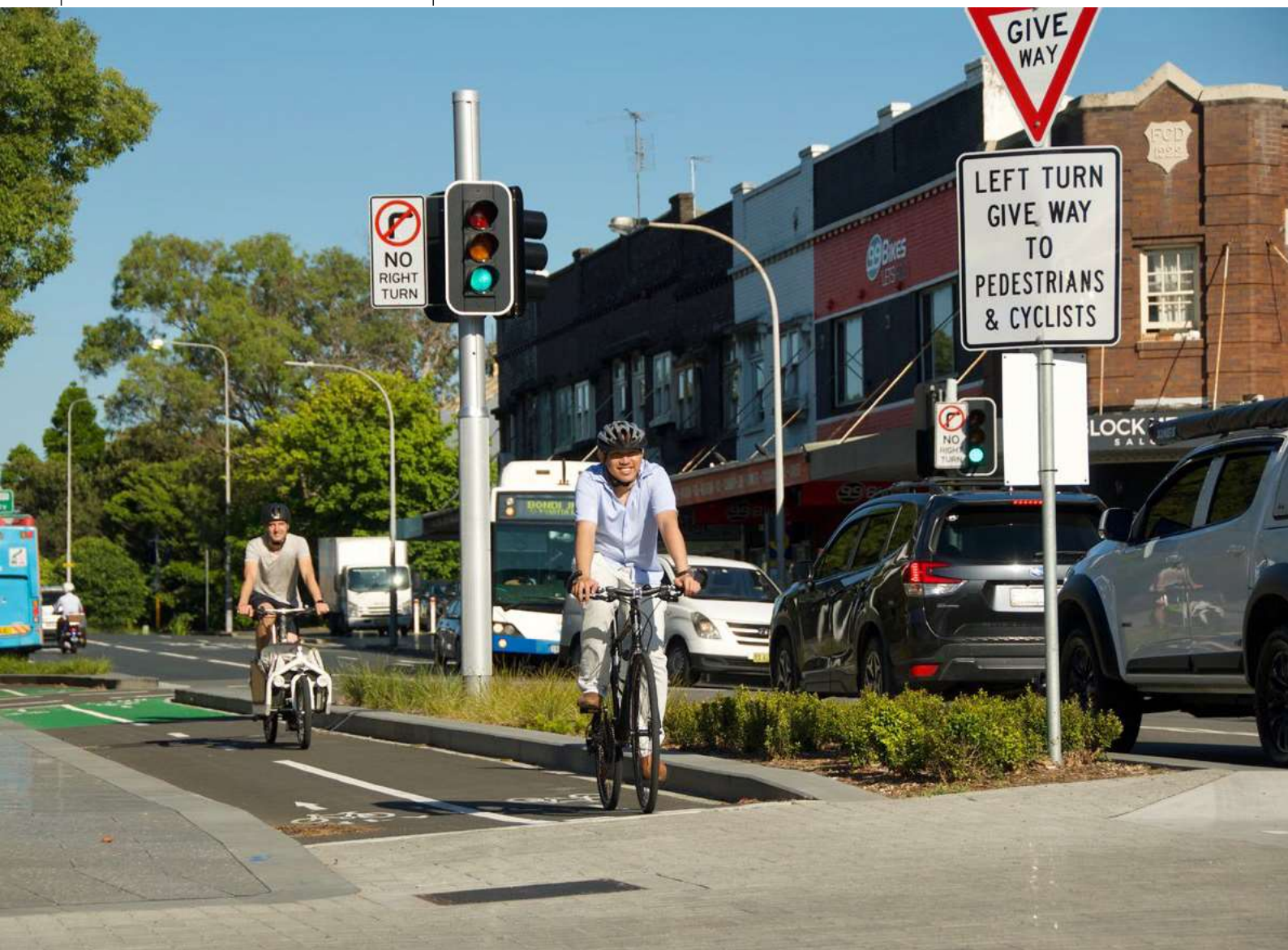
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Roads Customer Satisfaction Index

November 2022



Contents

Executive summary	3
Customer satisfaction methodology	4
November 2022 results	6
Private vehicle	7
Heavy vehicle	8
Motorcycle	9
Bicycle	10
Walking	11

Executive summary

The NSW Government's vision is for an integrated transport system that drives better outcomes for all customers.

The Roads Customer Satisfaction Index November 2022 independently brings together the voices of over 5,200 customers, and demonstrates current satisfaction levels across all transport modes for roads.

By publishing these results, TfNSW 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 transport system for all customers.

The below table shows overall roads customer satisfaction over time:

Overall customer satisfaction

Mode	Nov 2015	Nov 2016	May 2017	Nov 2017	May 2018	May 2019	May 2021	May 2022	Nov 2022
Private Vehicle	85%	83%	85%	85%	83%	85%	85%	88%	87%
Heavy Vehicle	67%	66%	61%	61%	75%	70%	70%	63%	58%
Motorcycle	86%	86%	82%	86%	89%	87%	92%	93%	89%
Bicycle	84%	85%	87%	88%	87%	85%	87%	90%	87%
Walking	85%	85%	85%	86%	85%	87%	85%	88%	89%

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 customers each year to help us drive improvement.

The survey was designed by the Customer Strategy and Technology of 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 journey time reliability, safety, road quality and design.

The Roads Customer Satisfaction Index (RCSI) November 2022 includes responses from more than 5,200 customers 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.

Customers were surveyed regarding their most recent experience by means of an online questionnaire with additional face-to-face interviews where required. Customers 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

Customers 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.

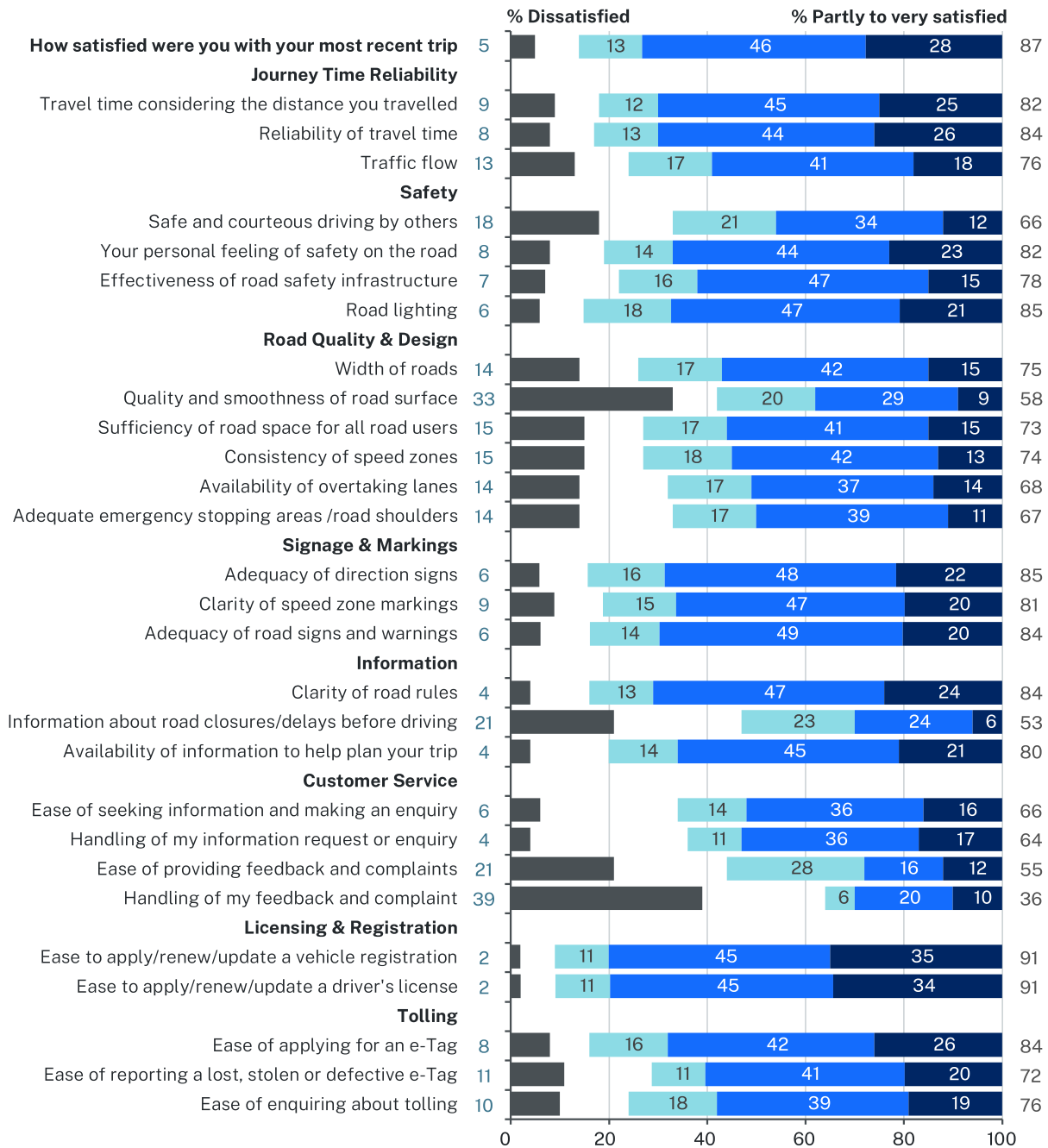
Notes about the customer satisfaction results in this report

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

November 2022 results

87%
satisfied

Private vehicle customer satisfaction



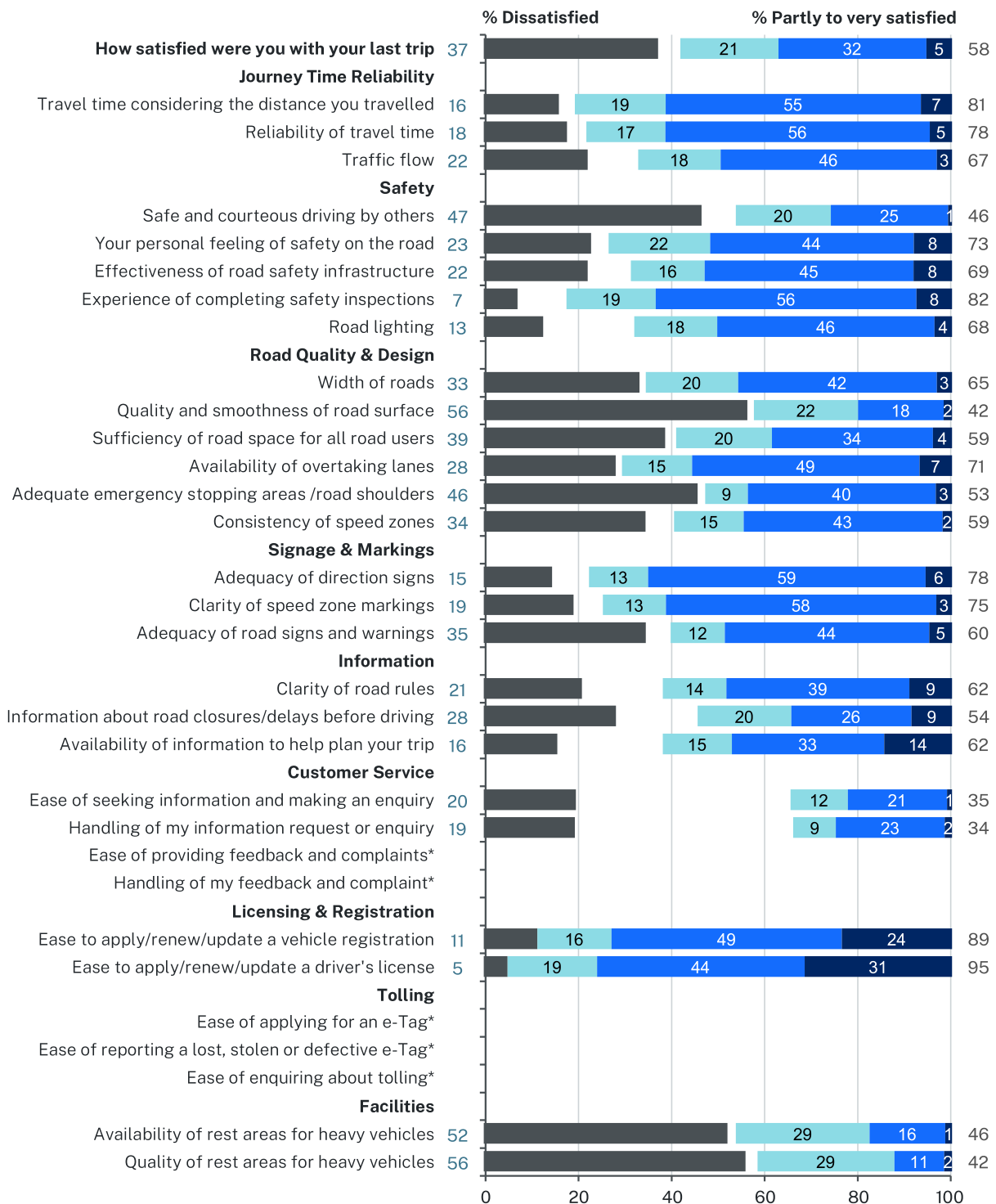
Summary

- Satisfaction with private vehicle trips is 87%
- Customers were most satisfied with Licensing & Registration including: ease to apply/renew/update vehicle registration
- Customers were least satisfied with information about road closures/delays before driving.

Dissatisfied includes customers 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.

58%
satisfied

Heavy vehicle customer satisfaction



Summary

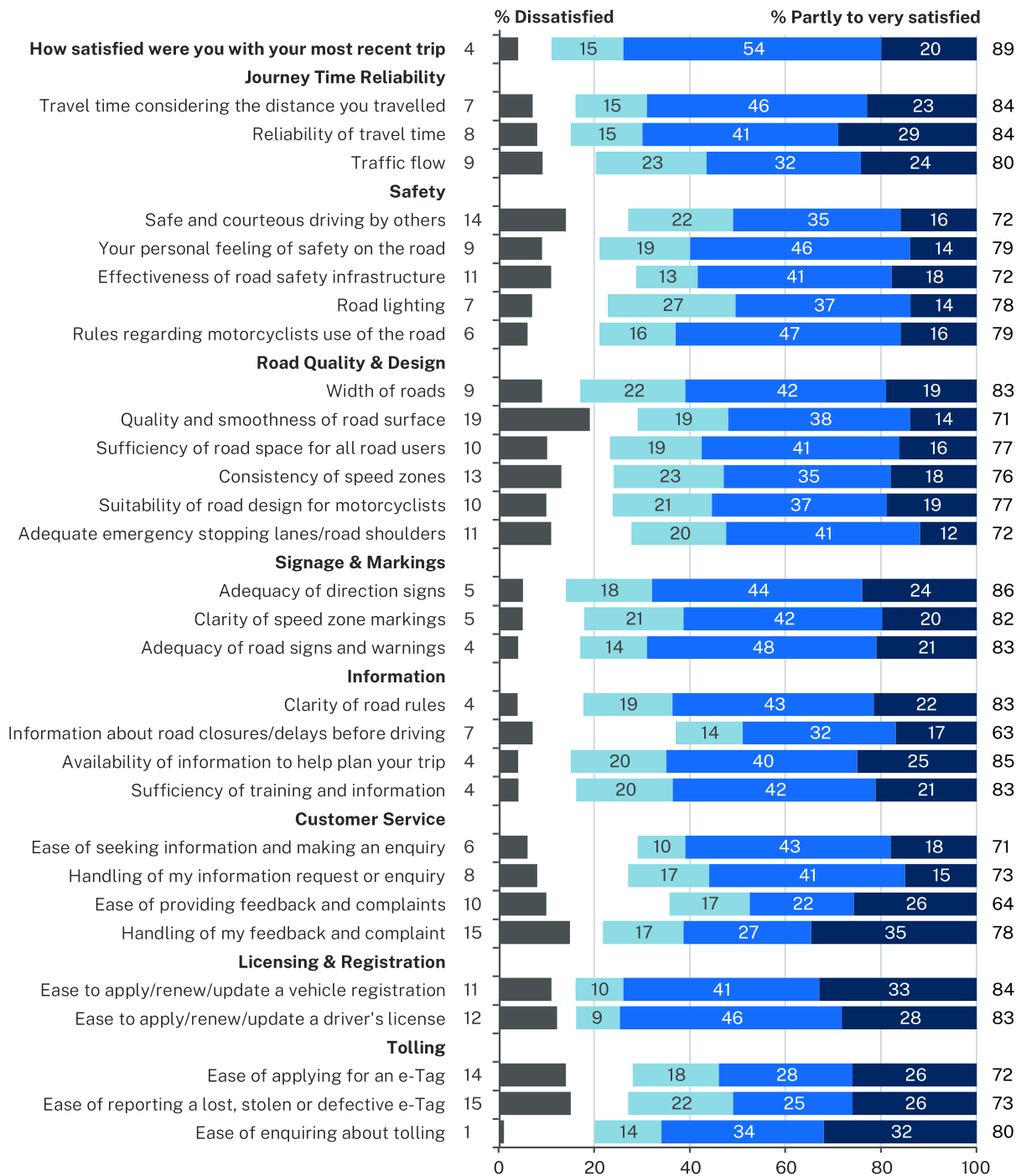
- Satisfaction with heavy vehicle trips is 58%
- Customers were most satisfied with Licensing & Registration
- Customers were least satisfied with availability and quality of rest areas and quality and smoothness of road surface

* Indicates low sample size for reporting purposes.

Dissatisfied includes customers 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.

89%
satisfied

Motorcycle customer satisfaction



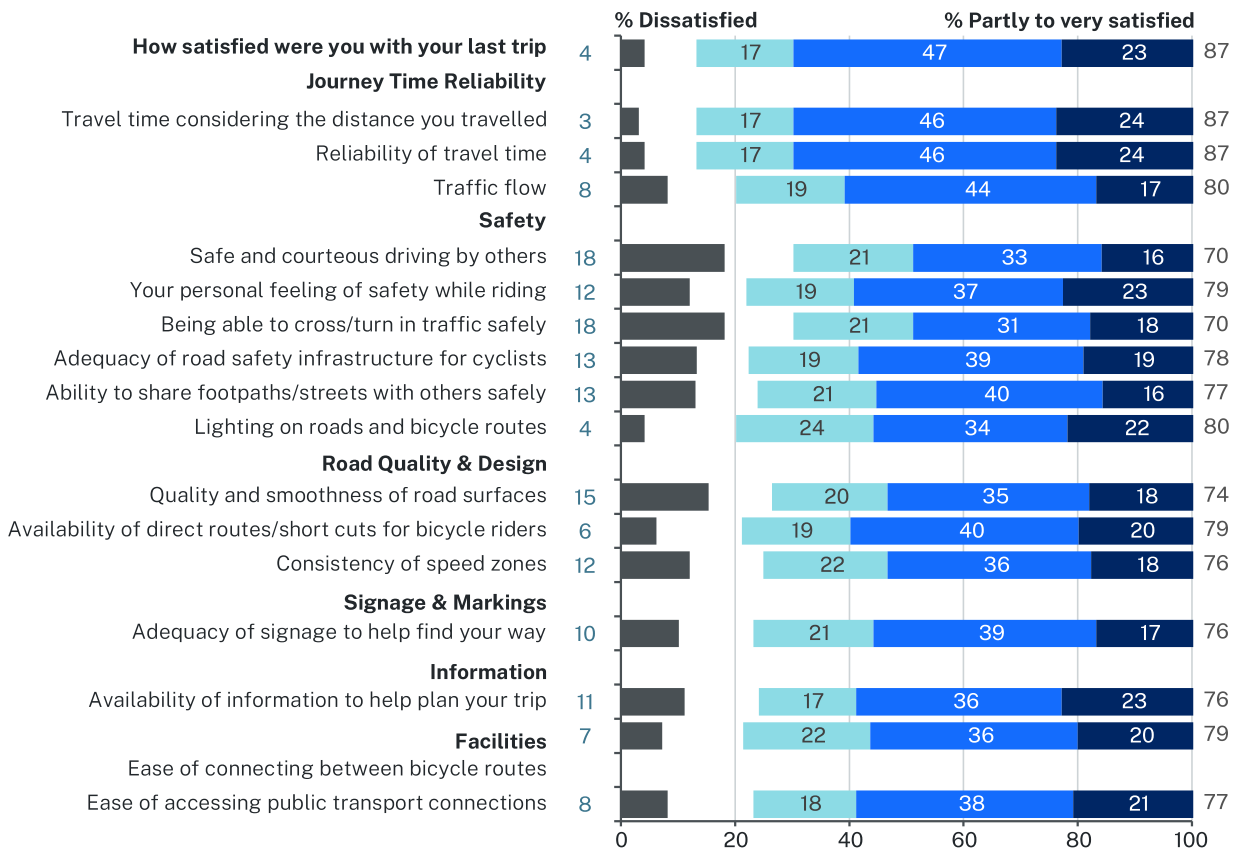
Summary

- Satisfaction among motorcycle users is 89%
- Customers were most satisfied with Licensing and Registration and Signage and Marking including; adequacy of direction signs
- Customers were least satisfied with Customer Service.

Dissatisfied includes customers 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

87%
satisfied

Bicycle customer satisfaction



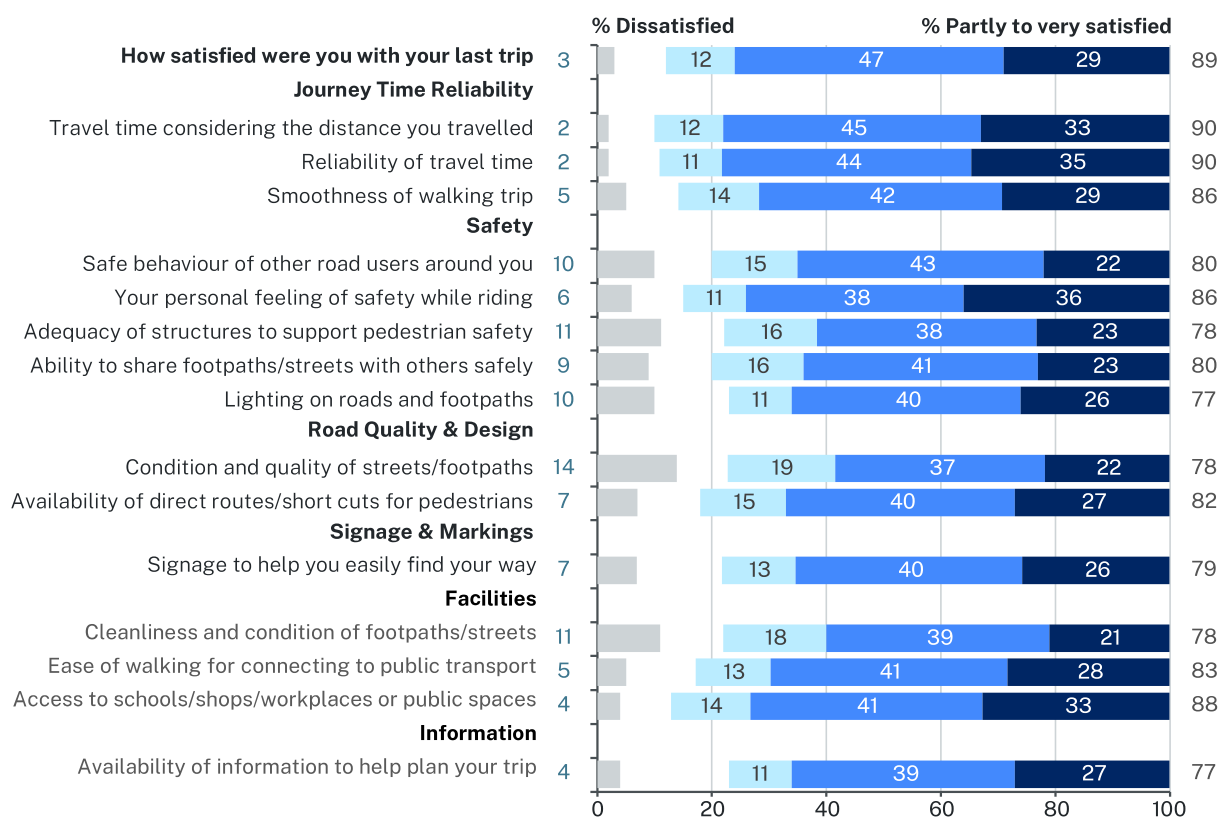
Summary

- Satisfaction with bicycle trips is 87%
- Customers were most satisfied with Journey Time Reliability including: travel time considering distance travelled and the reliability of travel time
- Customers were least satisfied with safe and courteous driving by others and adequacy of road safety infrastructure to support cyclist safety.

Dissatisfied includes customers 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

89%
satisfied

Walking customer satisfaction



Summary

- Satisfaction with walking trips is 89%
- Walkers were most satisfied with Journey Time Reliability including travel time considering the distance you travelled and reliability of travel time
- Walkers were least satisfied with availability of information to help plan your trip and lighting on roads and footpaths.

Dissatisfied includes customers 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.

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Point-to-Point Customer Satisfaction Index

November 2022



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Contents

Executive summary	3
Customer satisfaction methodology	4
November 2022 results	6
Urban Taxi Network	7
Rideshare	8
Hire Car	9

Executive summary

The NSW Government's vision is for an integrated public transport system that drives better outcomes for all customers.

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

The Point-to-Point Customer Satisfaction Index November 2022 independently brings together the voices of over 4,600 customers, and demonstrates current satisfaction levels across point-to-point transport.

By publishing these results, TfNSW 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 customers.

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

Overall customer satisfaction

Mode	Nov 2013	Nov 2016	May 2017	Nov 2017	May 2018	May 2019	May 2021	May 2022	Nov 2022
Taxi	82%	85%	81%	84%	86%	86%	90%	87%	86%
Rideshare	N/A	N/A	88%	91%	92%	91%	93%	90%	90%
Hire Car	N/A	N/A	85%	88%	91%	86%	93%	87%	88%

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 customers each year to help us drive improvement.

The survey was designed by the Customer Strategy & Technology of 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 2022 includes responses from more than 4,600 customers 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.

Customers were surveyed regarding their most recent experience by means of an online questionnaire. Customers 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

Customers 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

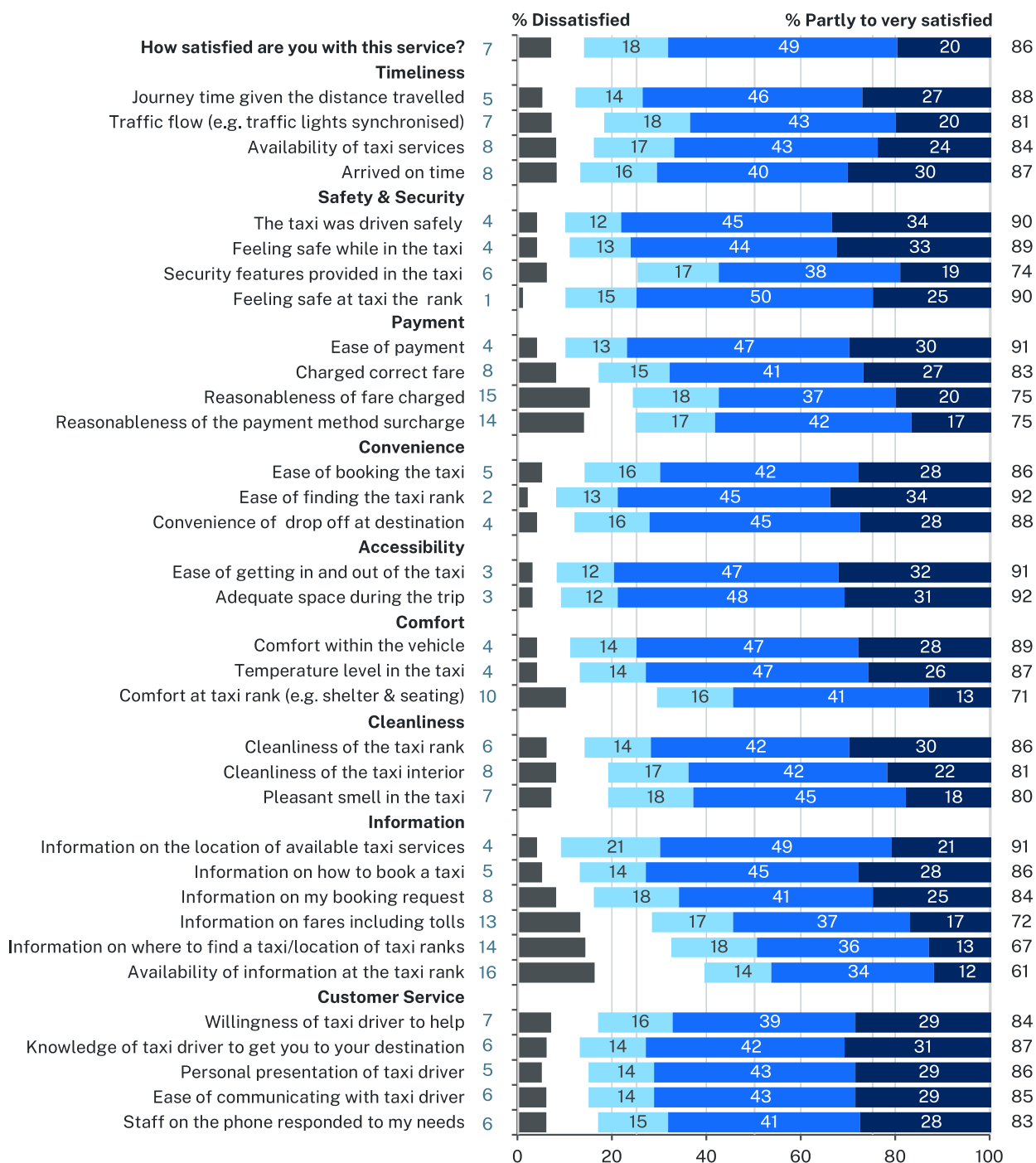
The reported variance between some results across time periods may differ from the variance between the whole number results due to rounding.

November 2022 results

86%

satisfied

Urban taxi network customer satisfaction



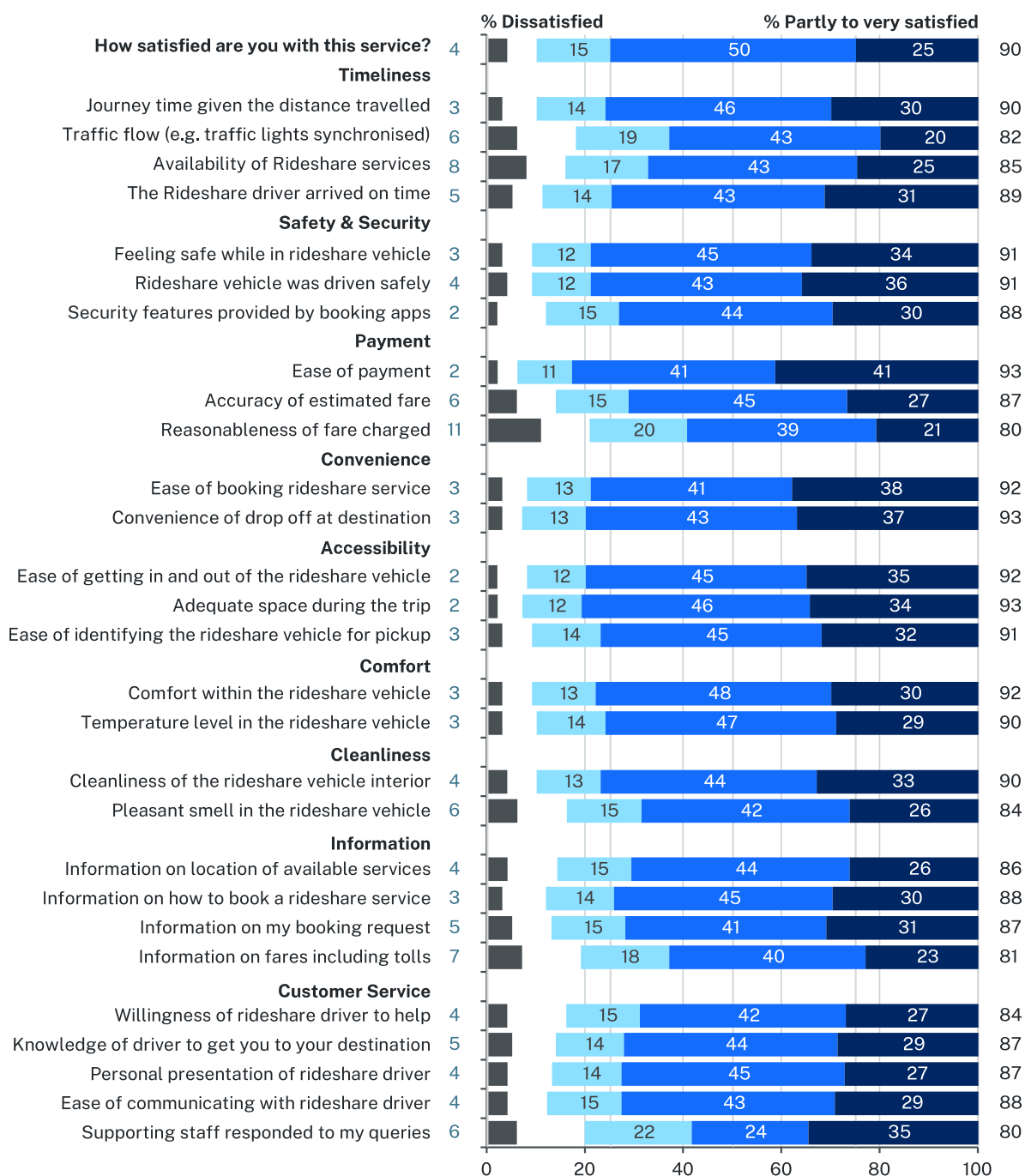
Summary

- Satisfaction with Taxi services is 86%
- Customers were most satisfied with Accessibility
- Customers were least satisfied with Information, including; information on where to find a service.

Dissatisfied includes customers 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.

90%
satisfied

Rideshare customer satisfaction



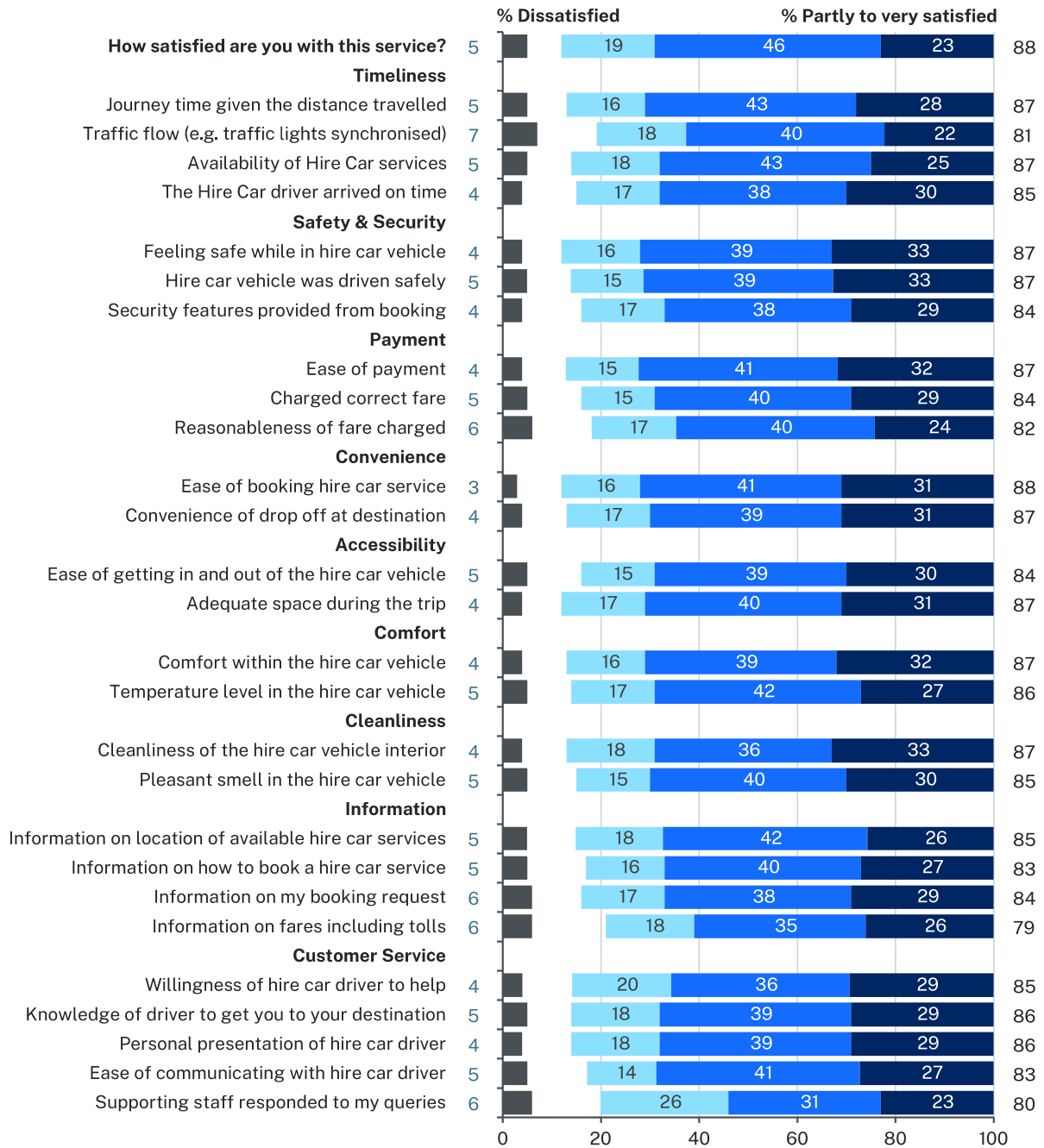
Summary

- Satisfaction with rideshare services is 90%
- Customers were most satisfied with Convenience
- Customers were least satisfied with Customer Service.

Dissatisfied includes customers 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.

88%
satisfied

Hire car customer satisfaction



Summary

- Satisfaction with Hire Car services is 88%
- Customers were most satisfied with Convenience and Comfort
- Customers were least satisfied with Information.

Dissatisfied includes customers 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

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