

KANTAR PUBLIC

Canberra Light Rail Customer Satisfaction Survey 2022

Prepared for Canberra Metro
Operations

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Executive Summary

Executive Summary

- Majority of respondents are not hesitant to travel on the Light Rail since the COVID pandemic (66%).
 - More than two in three respondents' travel patterns have not changed as a result of the COVID pandemic (70%).
 - The majority (91%) of respondents do not use any of the Light Rail park and ride locations. Of those who do, most people (81%) reported they are satisfied with their experience.
 - Most respondents (89%) reported they are satisfied with the Light Rail service information available for journey planning.
 - Half (51%) of respondents said they do not check what time the Light Rail service is scheduled to depart, they just turn up and wait.
 - Majority of people (81%) said they are satisfied with the information provided about planned service changes and disruptions. With two in five (42%) respondents saying they use Google Maps to find this information.
 - Satisfaction is high across ease of use, reliability, customer service, cleanliness and safety and security:
 - Ease of use average score 9.4 (98% satisfied or very satisfied - scores 7-10)
 - Reliability average score 9.1 (97% satisfied or very satisfied - scores 7-10)
 - Customer service average score 9.0 (95% satisfied or very satisfied - scores 7-10)
 - Cleanliness average score 9.0 (93% satisfied or very satisfied – scores 7-10)
 - Safety and security average score 8.9 (95% satisfied or very satisfied - scores 7-10)
 - Performance Target average score of no less than 6.5 is required for each of these metrics.
 - Likelihood to recommend Light Rail to friends or family is also high, with 73% being very likely to recommend and 21% being likely to recommend (94% overall) with an average score of 9.1.
 - Performance Target average score of no less than 8 is required for this metric.
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Methodology

Methodology

- Kantar Public partnered with Q&A Research to deliver the CMET Customer Satisfaction Survey:
 - Kantar Public are CMET's day-to-day contact, leading on all aspects of research design, analysis and reporting. Q&A Research are responsible for co-ordinating all aspects of fieldwork
- Quantitative questionnaire was completed using iPads on board Light Rail via intercepts
- n=1,099 total responses
- LOI was 3 minutes
- Fieldwork was conducted from 28 February 2022 – 13 March 2022, between all hours of operation and across different stops
- Margin of error was 2.87%
- Significance testing was conducted within Q Research Software. Overall testing is done at the 95% confidence level. Throughout the report, statistically significant differences have been highlighted
 - **Blue-coloured figures** reflect a figure significantly higher than other groups (e.g. 16-24 year old's vs. those not aged 16-24)
 - **Red-coloured figures** reflect a figure significantly lower than other groups
- Project was conducted according to quality assurance standards (ISO accreditation 20252:2019)

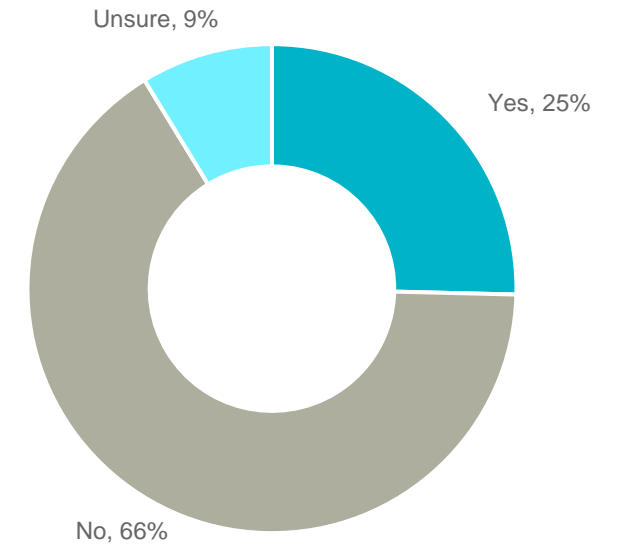
Note: Where numbers are omitted throughout this report, the corresponding result is <1%

Use of Light Rail and COVID impacts

Hesitancy to use Light Rail since COVID pandemic

The majority of Light Rail users (66%) are not hesitant to travel on the Light Rail since the COVID pandemic began.

Males are significantly more likely to not be hesitant compared to females (72% and 62%, respectively).

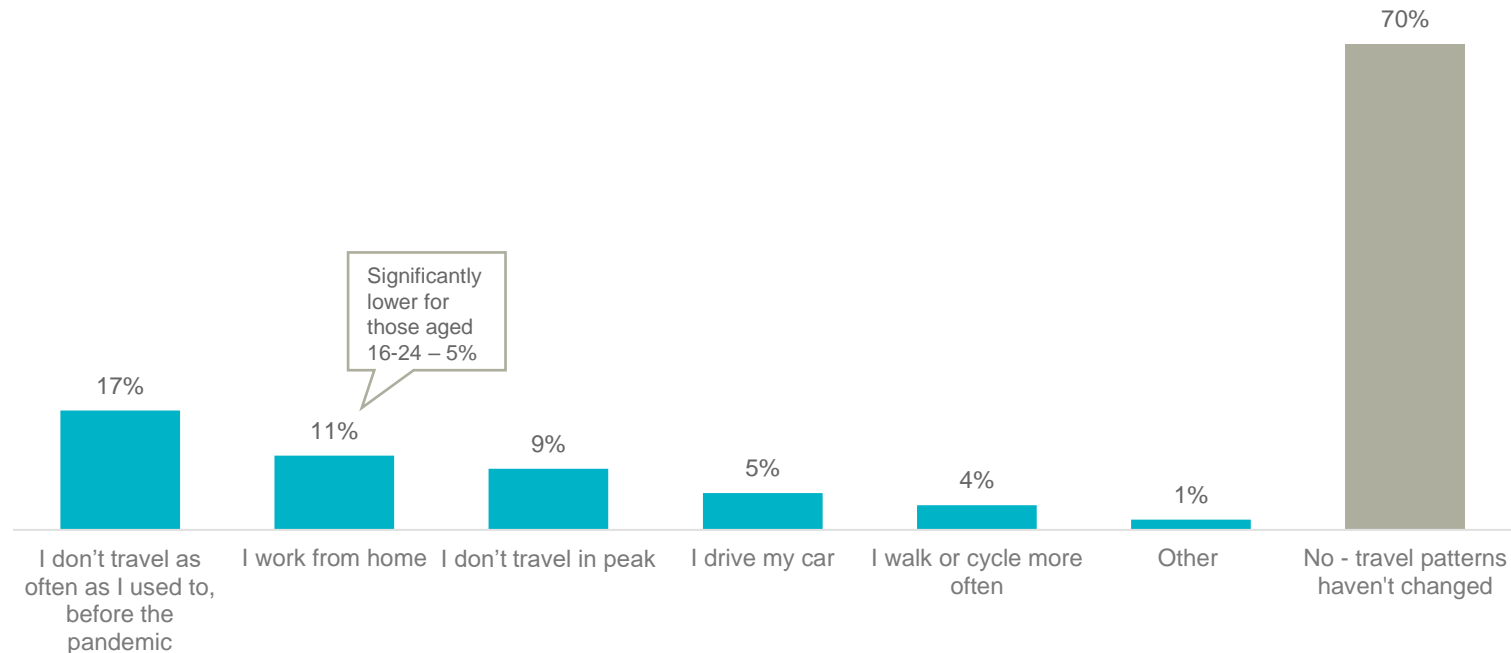


	TOTAL	GENDER		AGE				
		Male	Female	16-24	25-34	35-49	50-64	65+
YES	25%	22%	28%	26%	23%	27%	28%	22%
NO	66%	72%	62%	66%	66%	63%	64%	76%
UNSURE	9%	6%	10%	8%	11%	10%	9%	1%
Base n=	1099	463	636	336	350	208	129	76

Change in travel patterns since COVID pandemic

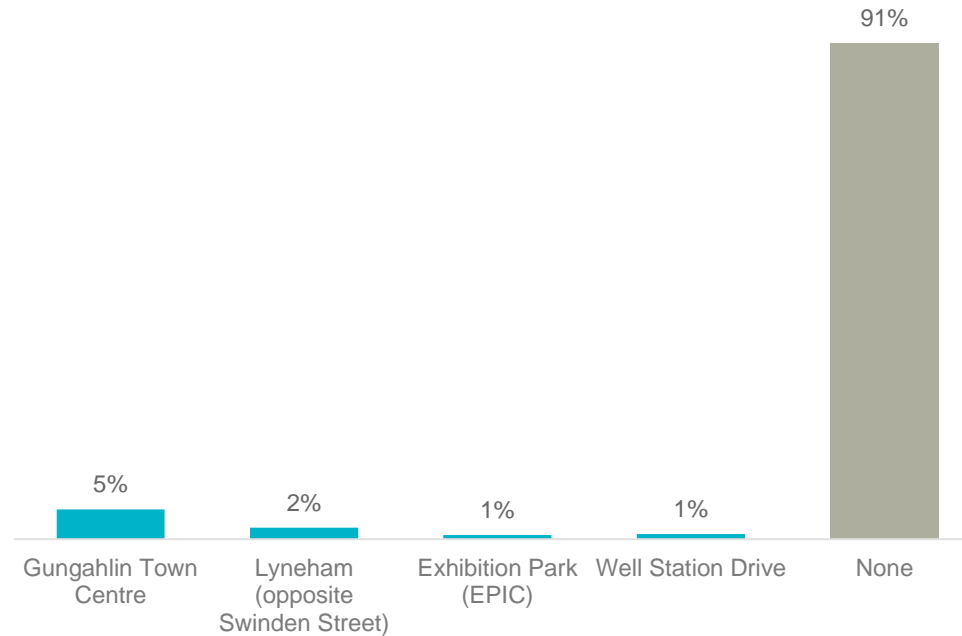
The majority of Light Rail users' travel patterns have not change due to the COVID pandemic (70%). Among those whose travel patterns have changed, the most common reasons for this change were related to not travelling as often as they did prior to the pandemic (17%), followed by working from home (11%).

Not surprisingly, fewer respondents from the 16-24 year group are likely to have mentioned that their travel patterns have changed due to working from home (5%).



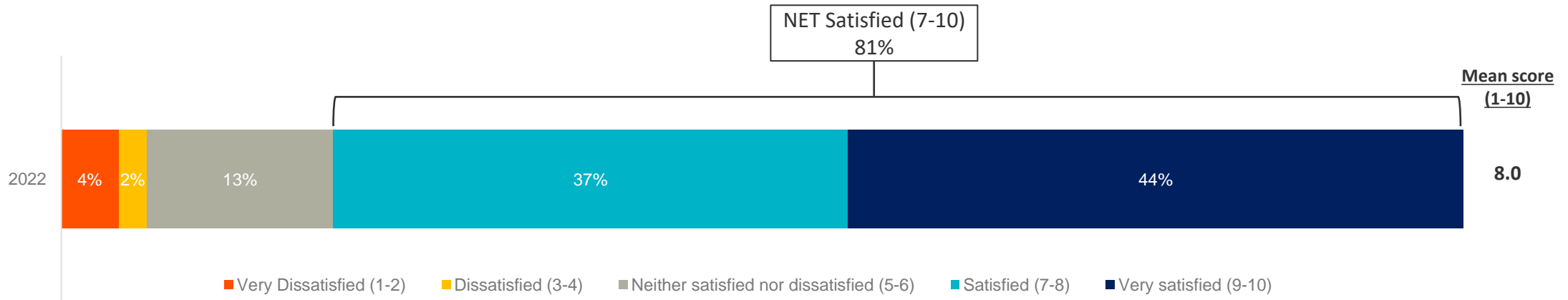
Light Rail park and ride usage

The vast majority of Light Rail users report they do not use any of the park and ride facilities (91%). Among those who do use these facilities, Gungahlin Town Centre is reportedly the most used (5%).



Satisfaction with Light Rail park and ride

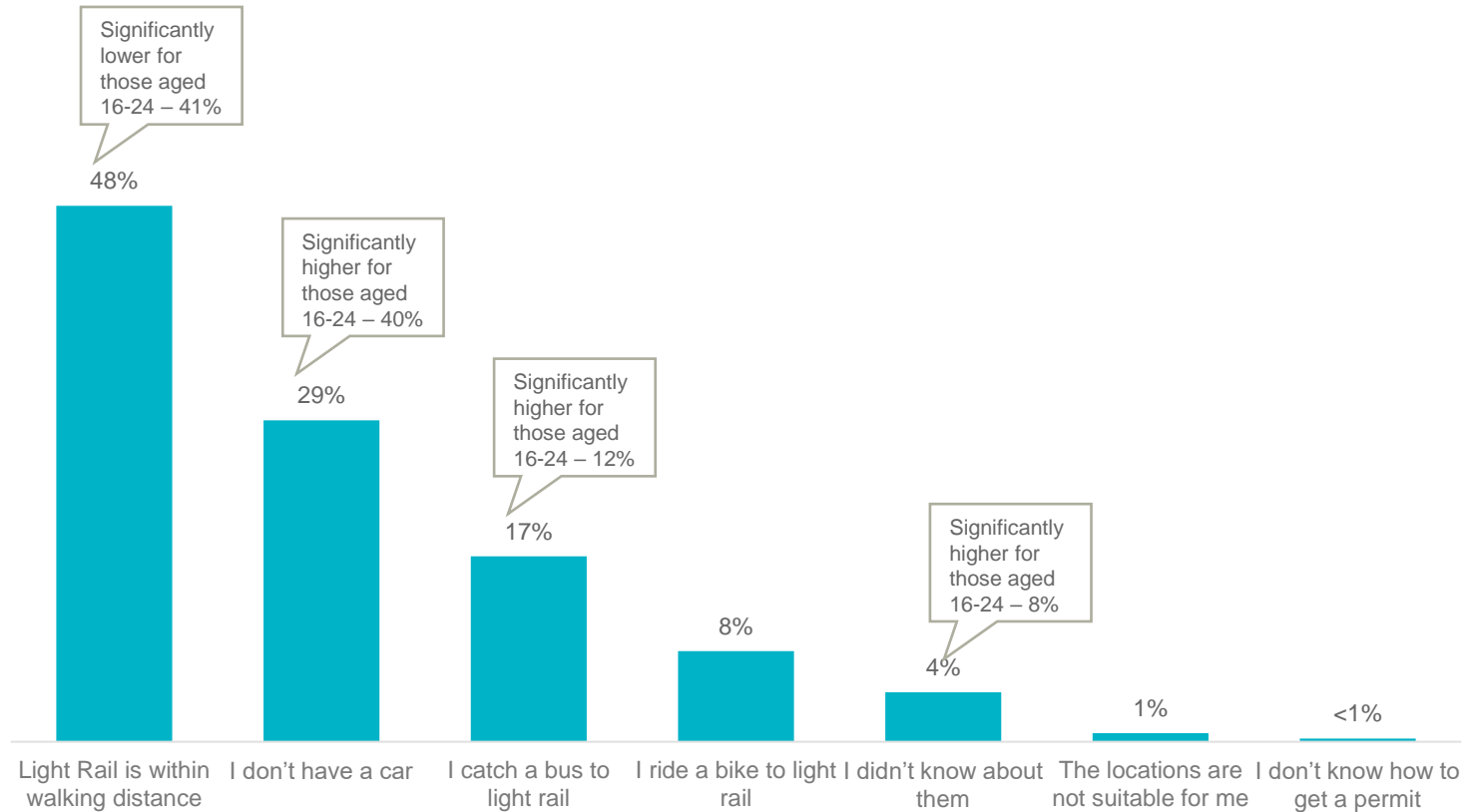
Among Light Rail users who have utilised the park and ride facilities, four in five (81%) are satisfied with their experience, with almost half (44%) being very satisfied.



Reasons for not using Light Rail park and ride

Just under half of those who do not use the park and ride facilities (48%) report that it is because they live within walking distance. This is followed by 29% saying it is because they do not have a car, and a further 17% who say it is because they catch a bus to the light rail.

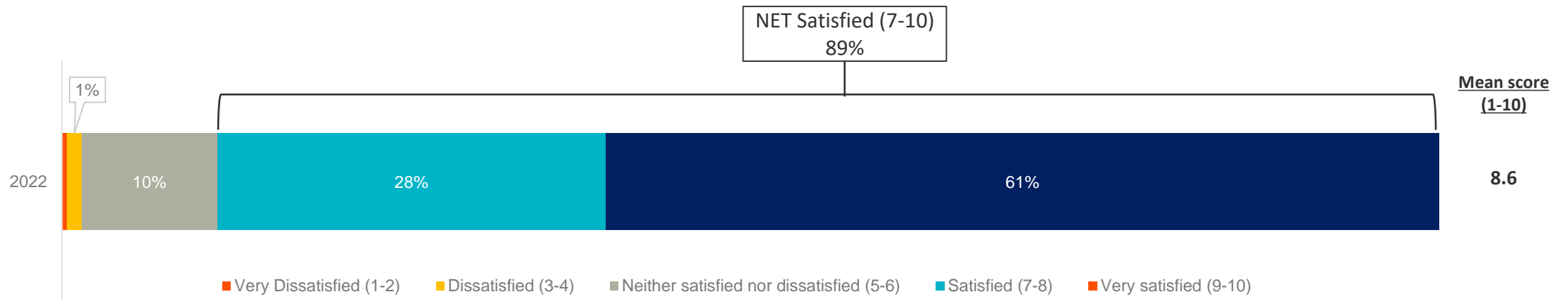
Those aged 16-24 years, are significantly more likely to say they do not use the park and rides due to not having a car (40%), they catch a bus to the light rail (12%) or do not know about them (8%). Conversely, those aged 16-24 years are significantly less likely to say they do not use the park and rides because the light rail is within walking distance (41%).



Use of Light Rail service information

Satisfaction with the Light Rail journey planning service information

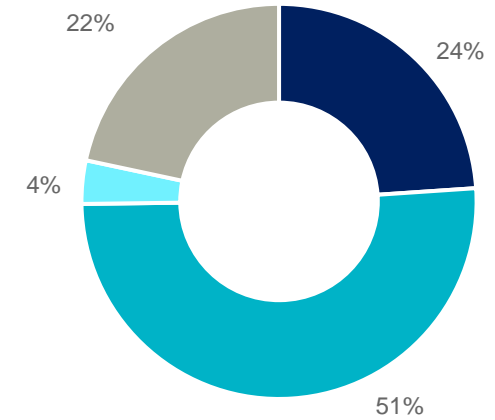
When prompted, 89% of Light Rail users said that they are satisfied with the service information available to plan their Light Rail journey. Over half of respondents (61%) are very satisfied with these services.



Checking Light Rail timetable

One in two Light Rail users (51%) report they do not check the timetable, they just turn up and wait for the next service. This is significantly higher among males (59%) and those aged 50-64 (74%) and 65+ (82%).

Despite only 24% of respondents saying they check the journey planner or timetable, usage of these services are particularly higher among those aged 16-24 (32%) and 25-34 (31%).



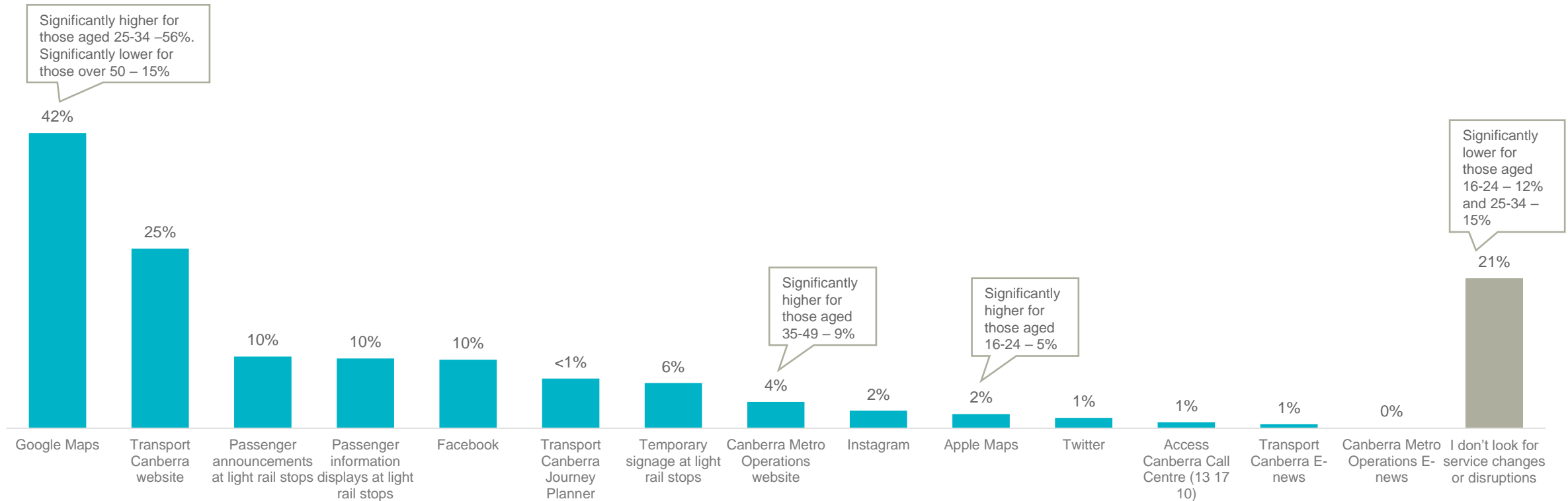
- Yes, I check a journey planner or the timetable before going to the light rail stop
- No, I just turn up and wait for the next service.
- No, but I always catch the same service, so I know what time it arrives.
- Sometimes I turn up and wait, and sometimes I check beforehand.

	TOTAL	GENDER		AGE				
		Male	Female	16-24	25-34	35-49	50-64	65+
YES, I CHECK A JOURNEY PLANNER OR TIMETABLE	24%	22%	25%	32%	31%	13%	11%	5%
NO, I JUST TURN UP AND WAIT	51%	59%	45%	46%	37%	56%	74%	82%
NO, BUT I ALWAYS CATCH THE SAME SERVICE	4%	4%	3%	3%	4%	3%	3%	4%
SOMETIMES I TURN UP AND WAIT AND SOMETIMES I CHECK BEFORE HAND	22%	15%	26%	18%	28%	28%	12%	9%
Base n=	1099	463	636	336	350	208	129	76

Source of information for planned service changes and disruptions

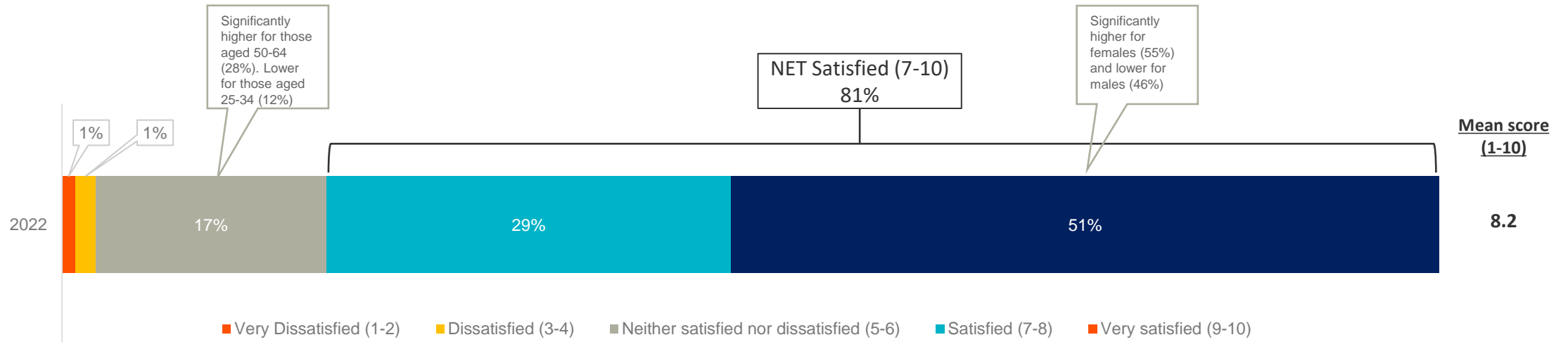
The most used sources of information for Light Rail planned service changes and disruptions is Google Maps (42%), followed by the Transport Canberra website (25%). Around one in five (21%) indicated they do not look for service changes or disruptions.

The use of Google Maps for these updates is significantly higher for those aged 25-34 (56%) and significantly lower for those aged over 50 (15%).



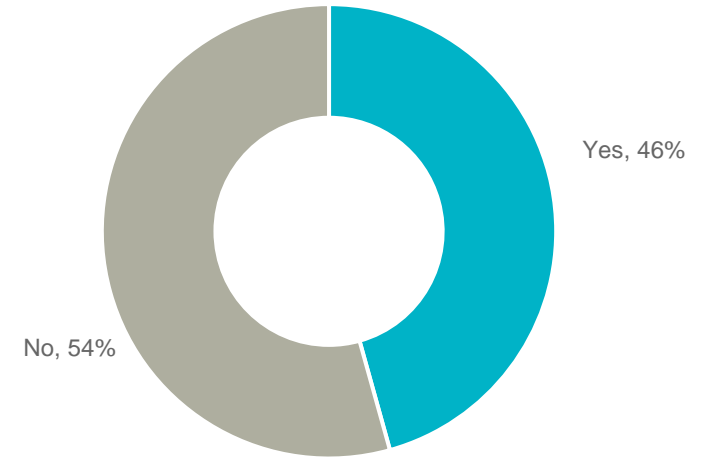
Satisfaction with the information about planned service changes and disruption

The majority of Light Rail users are satisfied with the information provided about planned service changes and disruptions (81%). Over half (51%) of respondents are very satisfied, with significantly more females reporting very satisfied (55%) compared to males (46%).



Finding Light Rail replacement bus stops

When asked about finding Light Rail replacement bus stops, under half (46%) of Light Rail users know how to do so. Males are significantly more likely to know how to find the nearest Light Rail replacement bus stop (51%) than females (42%).



	TOTAL	GENDER		AGE				
		Male	Female	16-24	25-34	35-49	50-64	65+
YES	46%	51%	42%	43%	46%	45%	47%	54%
NO	54%	49%	58%	57%	54%	55%	53%	46%
Base n=	1099	463	636	336	350	208	129	76

Q15. If you were already at the Light Rail stop and there was a service disruption, do you know how to find the nearest Light Rail replacement bus stop?

Base: All respondents 2022 n=1099

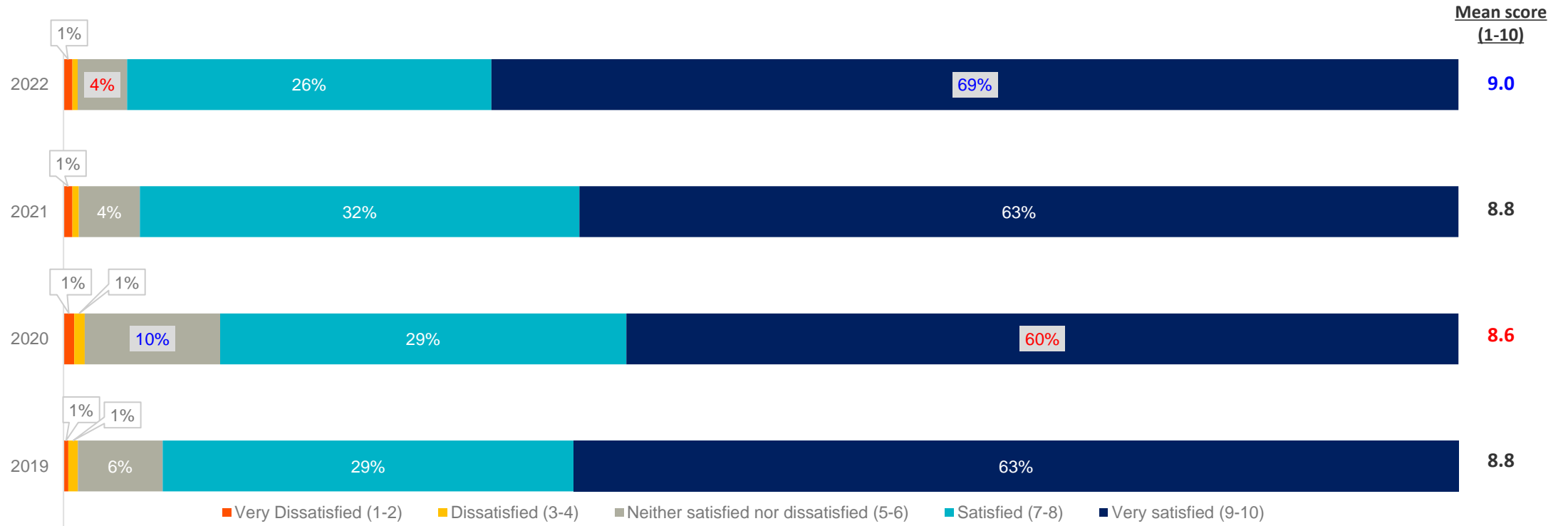
Significantly higher than other groups (i.e. cell vs. not-cell)

Significantly lower than other groups

Satisfaction with Light Rail
and likelihood to recommend

Satisfaction with the customer service of the Light Rail staff

Satisfaction with customer service of Light Rail staff has remained high, with 95% of respondents reporting they are satisfied or very satisfied. There was a significant increase in respondents reporting they are very satisfied in 2022 (69%) compared to previous years.



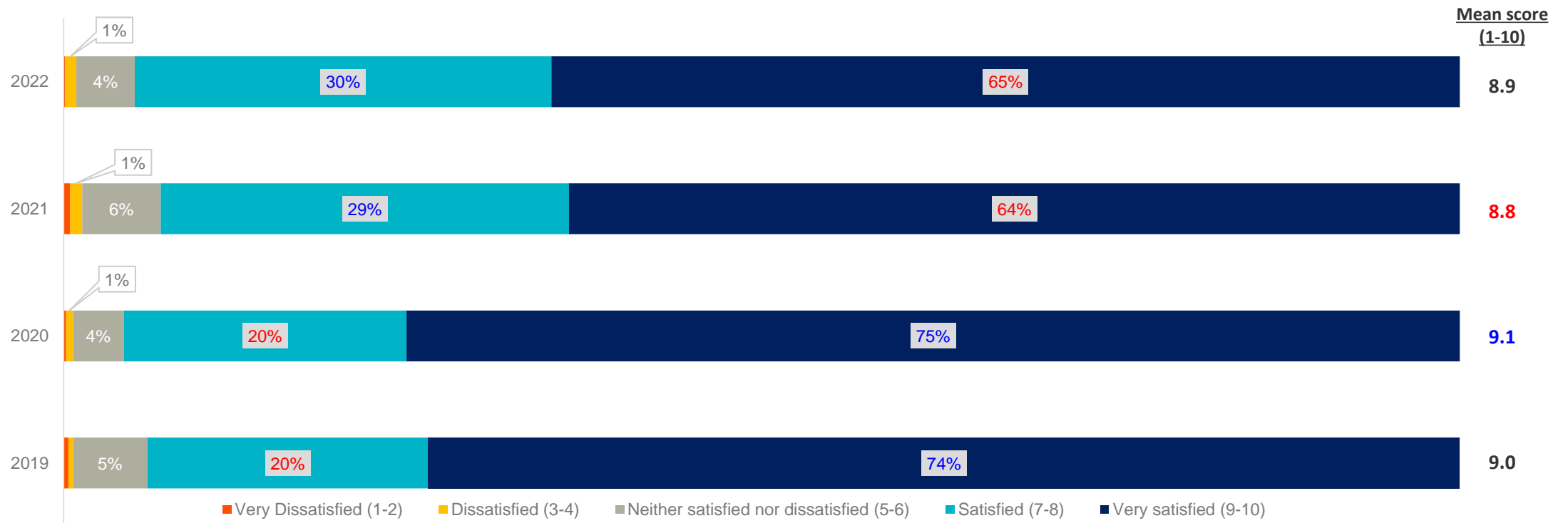
Satisfaction with the customer service of the Light Rail staff

Satisfaction with customer service of the Light Rail staff is high across all demographics. Females reported being very satisfied (74%) significantly more than males (63%).

	TOTAL	GENDER		AGE				
		Male	Female	16-24	25-34	35-49	50-64	65+
Very Satisfied (9-10)	69%	63%	74%	70%	70%	70%	67%	67%
Satisfied (7-8)	26%	32%	22%	27%	25%	25%	24%	33%
Neither satisfied nor dissatisfied (5-6)	4%	5%	3%	3%	3%	4%	7%	0%
Dissatisfied (3-4)	0%	1%	0%	0%	1%	0%	2%	0%
Very dissatisfied (1-2)	1%	0%	1%	1%	1%	0%	1%	0%
Mean score (1-10)	9.0	8.8	9.1	9.0	9.0	9.0	8.8	9.1
Base n=	1099	463	636	336	350	208	129	76

Satisfaction with the safety and security when travelling on Light Rail

The average rating of satisfaction with the safety and security when travelling on Light Rail saw a slight increase from in 2022 (8.9) from 2021 (8.8). Additionally, respondents reporting that they are very satisfied (65%) remains significantly lower than results in 2020 (75%) and 2019 (74%). Despite this, overall satisfaction remains high with 95% of respondents reported they are satisfied or very satisfied with the safety and security when travelling on Light Rail.



Satisfaction with the safety and security when travelling on Light Rail

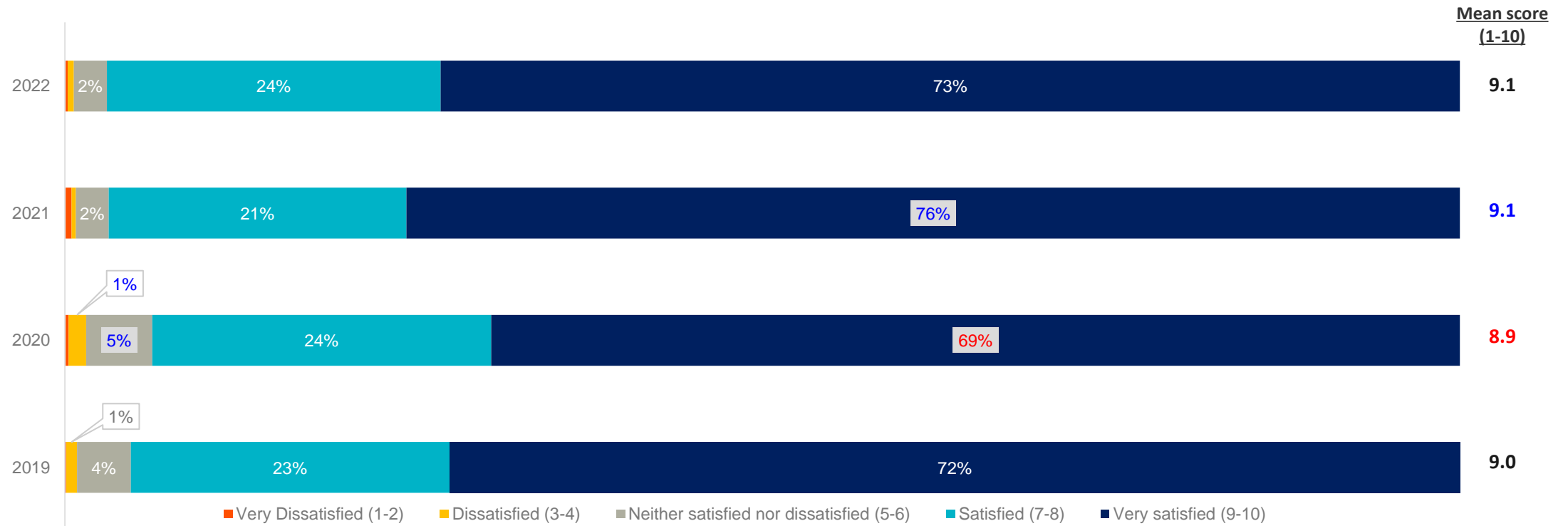
Satisfaction with the safety and security when travelling on Light Rail remains high and consistent across all demographic categories.

	TOTAL	GENDER		AGE				
		Male	Female	16-24	25-34	35-49	50-64	65+
Very Satisfied (9-10)	65%	64%	66%	66%	60%	64%	72%	74%
Satisfied (7-8)	30%	30%	30%	29%	33%	32%	22%	22%
Neither satisfied nor dissatisfied (5-6)	4%	4%	4%	4%	6%	2%	4%	3%
Dissatisfied (3-4)	1%	1%	0%	1%	1%	1%	1%	1%
Very dissatisfied (1-2)	0%	0%	0%	0%	0%	0%	1%	0%
Mean score (1-10)	8.9	8.8	8.9	8.9	8.8	8.9	9.0	9.1
Base n=	1099	463	636	336	350	208	129	76

CQ2. How dissatisfied or satisfied are you with 'safety and security when travelling on Light Rail'?
 Base: All respondents 2022 n=1099
 Significantly higher than other groups (i.e. cell vs. not-cell)
 Significantly lower than other groups

Satisfaction with the reliability of Light Rail

Similar to previous years, respondents satisfaction with the reliability of Light Rail in terms of it departing and arriving on time remains very high (97%). Three in four respondents (73%) in 2022 report being very satisfied with the reliability of Light Rail.



Satisfaction with the reliability of Light Rail

Satisfaction with the reliability of Light Rail in terms of it departing and arriving on time is quite consistent across all demographic groups. However, respondents aged 50-64 are significantly less likely to report they are satisfied with the reliability (12%).

	TOTAL	GENDER		AGE				
		Male	Female	16-24	25-34	35-49	50-64	65+
Very Satisfied (9-10)	73%	72%	74%	72%	71%	69%	84%	82%
Satisfied (7-8)	24%	24%	24%	26%	25%	31%	12%	14%
Neither satisfied nor dissatisfied (5-6)	2%	2%	2%	2%	3%	0%	4%	3%
Dissatisfied (3-4)	0%	1%	0%	0%	1%	0%	1%	1%
Very dissatisfied (1-2)	0%	0%	0%	0%	0%	0%	0%	0%
Mean score (1-10)	9.1	9.0	9.1	9.1	9.0	9.1	9.3	9.3
Base n=	1099	463	636	336	350	208	129	76

Satisfaction with ease of using Light Rail

Following the similar positive trend from 2021, the average score in 2022 for the ease of using Light Rail (9.4) is significantly higher than previous years. Moreover, there are significantly more people who report being very satisfied with the ease of using Light Rail (83%) than in 2020 (74%) and 2019 (74%).



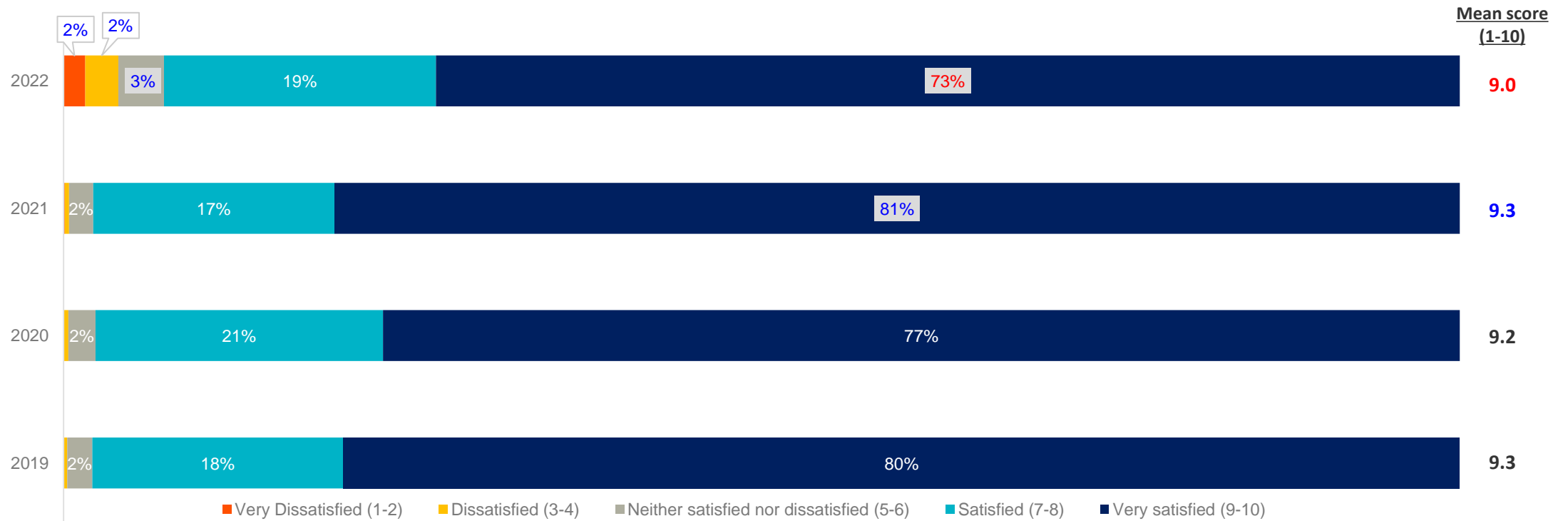
Satisfaction with ease of using Light Rail

Overall, the satisfaction with the ease of using Light Rail is very high across all demographic groups. However, females did demonstrate a significantly higher average score (9.5) for their satisfaction compared to males (9.3).

	TOTAL	GENDER		AGE				
		Male	Female	16-24	25-34	35-49	50-64	65+
Very Satisfied (9-10)	83%	80%	85%	82%	83%	82%	85%	84%
Satisfied (7-8)	15%	18%	14%	17%	15%	17%	11%	14%
Neither satisfied nor dissatisfied (5-6)	1%	1%	1%	1%	2%	1%	2%	0%
Dissatisfied (3-4)	0%	0%	0%	0%	0%	0%	1%	1%
Very dissatisfied (1-2)	0%	0%	0%	0%	0%	0%	1%	0%
Mean score (1-10)	9.4	9.3	9.5	9.4	9.4	9.4	9.4	9.5
Base n=	1099	463	636	336	350	208	129	76

Satisfaction with cleanliness on board Light Rail and at the stops

Results from 2022 show a significant decrease in the number of respondents who are very satisfied with the cleanliness on board Light Rail and at the stops (73%) compared to other years. Despite this decrease in very satisfied, overall satisfaction remains very high (93%).



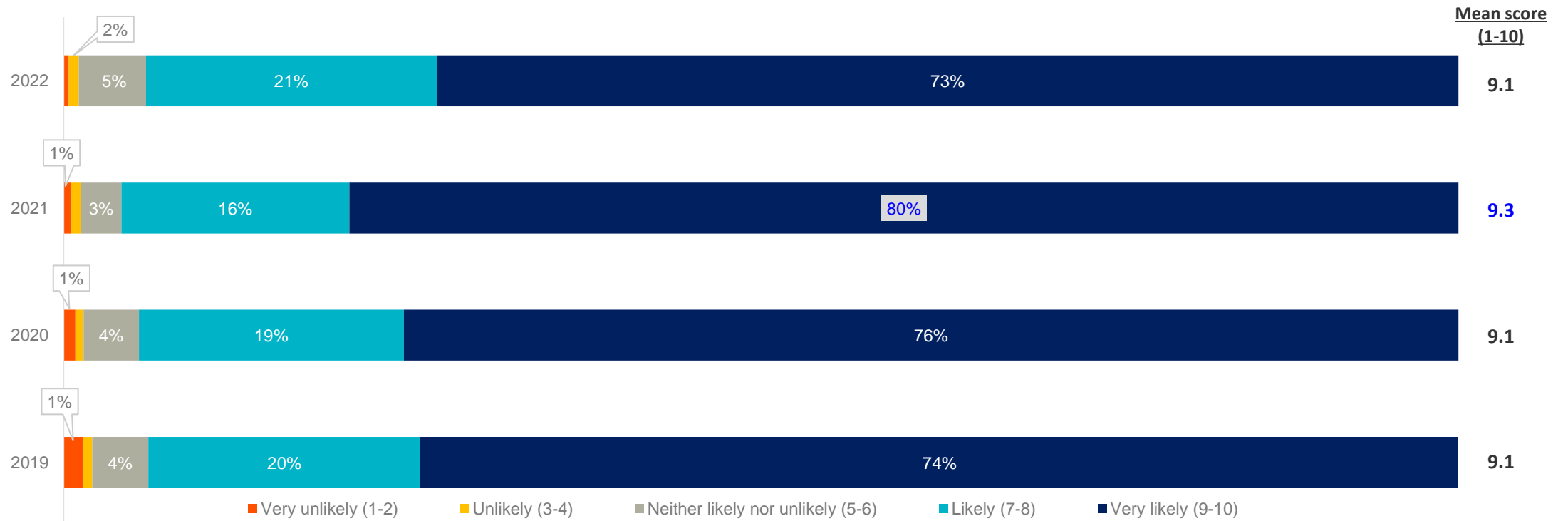
Satisfaction with cleanliness on board Light Rail and at the stops

Light Rail users respond consistently across most satisfaction levels for how satisfied they are with the cleanliness on board Light Rail and at the stops. However, males (25%) and those aged 16-24 (25%) are significantly more likely to report they are satisfied compared to other demographic groups.

	TOTAL	GENDER		AGE				
		Male	Female	16-24	25-34	35-49	50-64	65+
Very Satisfied (9-10)	73%	70%	76%	68%	72%	78%	78%	86%
Satisfied (7-8)	19%	25%	16%	25%	21%	14%	16%	11%
Neither satisfied nor dissatisfied (5-6)	3%	3%	4%	4%	3%	3%	3%	3%
Dissatisfied (3-4)	2%	2%	3%	2%	3%	3%	2%	0%
Very dissatisfied (1-2)	2%	1%	2%	1%	2%	2%	1%	1%
Mean score (1-10)	9.0	9.0	9.0	8.8	8.9	9.0	9.1	9.3
Base n=	1099	463	636	336	350	208	129	76

Likelihood of recommending Light Rail to friends and family

Consistent with previous years, 94% of respondents report likely to recommend Light Rail to their friends and family. While not significant, there is however a directional decrease in the proportion of respondents who are very likely to recommend Light Rail in 2022 (73%) compared with 2021 (80%).



Likelihood of recommending Light Rail to friends and family

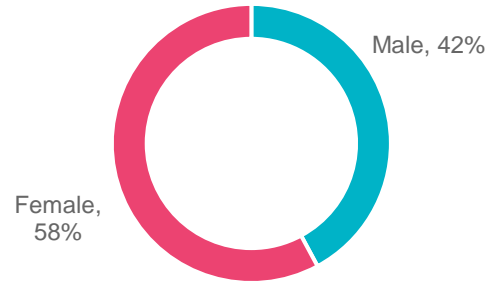
Respondents report consistently high likelihood of recommending Light Rail to friends and family across both gender and age demographics. However, females (9.2) and those aged 50-64 (9.3) and 65+ (9.5) have significantly higher average scores than other demographic groups.

	TOTAL	GENDER		AGE				
		Male	Female	16-24	25-34	35-49	50-64	65+
Very likely (9-10)	73%	69%	76%	69%	75%	71%	78%	86%
Likely (7-8)	21%	24%	19%	22%	19%	25%	21%	11%
Neither likely nor unlikely (5-6)	5%	5%	4%	7%	5%	4%	2%	4%
Unlikely (3-4)	1%	1%	1%	1%	1%	0%	0%	0%
Very unlikely (1-2)	0%	1%	0%	1%	0%	0%	0%	0%
Mean score (1-10)	9.1	9.0	9.2	8.9	9.1	9.1	9.3	9.5
Base n=	1099	463	636	336	350	208	129	76

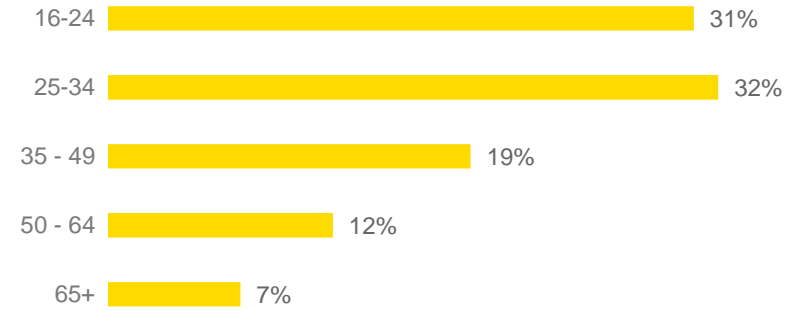
Appendix: Demographics and questionnaire

Respondent profile

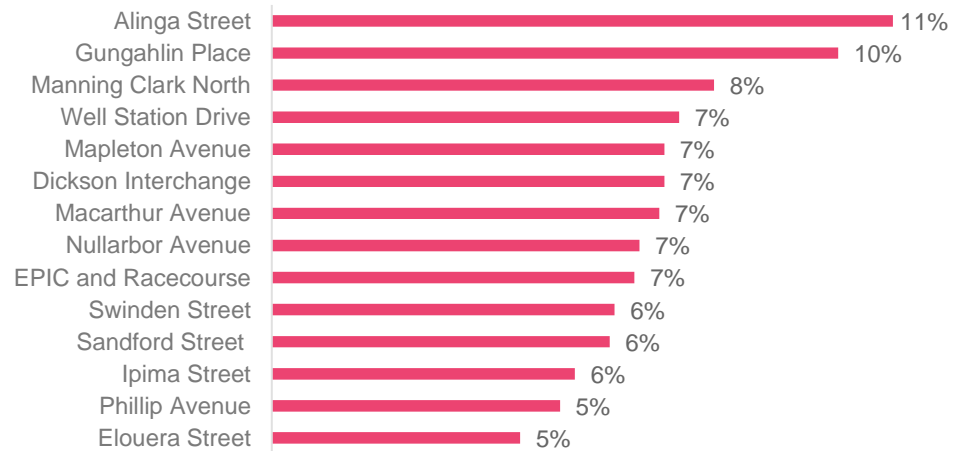
Gender



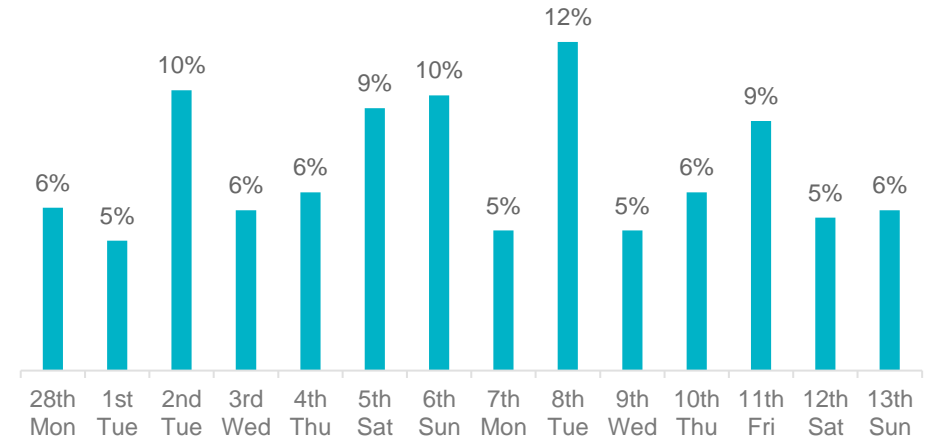
Age groups



Most recent stop



Date of interview (February/March)



Questionnaire

Light Rail Customer Satisfaction Survey - Q1, 2022 28 Feb – 13 Mar 2022.

Part 1 - Screening Questions

- Record most recent stop**
 - Gungahlin Place
 - Manning Clark North
 - Mapleton Avenue
 - Nullarbor Avenue
 - Well Station Drive
 - Sandford Street
 - EPIC and Racecourse
 - Phillip Avenue
 - Swinden Street
 - Dickson Interchange
 - Macarthur Avenue
 - Ipima Street
 - Elouera Street
 - Alinga Street
- Record direction of travel and time of day**
 - North (toward Gungahlin)
 - South (toward City)
- Record perceived gender**
 - Male
 - Female
- Which of the follow age ranges are you in?**
 - Under 16 (Terminate)
 - 16-24
 - 25-34
 - 35-49
 - 50-64
 - 65+

Part 2 - Contractual Questions

NOTE: All questions in Part 2 use a scale from 1 to 10, where 1 is very dissatisfied and 10 is very satisfied.

- How dissatisfied or satisfied are you with the 'customer service of the Light Rail staff'?**
 - Scale of 1 to 10
- How dissatisfied or satisfied are you with 'safety and security when travelling on Light Rail'?**
 - Scale of 1 to 10
- How dissatisfied or satisfied are you with the 'reliability of Light Rail in terms of it departing and arriving on time'?**
 - Scale of 1 to 10
- How dissatisfied or satisfied are you with the 'ease of using Light Rail'?**
 - Scale of 1 to 10
- How dissatisfied or satisfied are you with the 'cleanliness on board the Light Rail vehicle and at the stops'?**
 - Scale of 1 to 10

- How likely or unlikely are you to 'recommend Light Rail to your family and friends'?**
 - Scale of 1 to 10

Part 3 - TCCS Additional Questions

- How satisfied are you with the light rail service information available to plan your journey?**
 - Scale of 1 to 10
- Do you normally check what time the light rail service is scheduled to depart before heading to the light rail stop?**

One of the following:

 - Yes, I check a [journey planner](#) or the [timetable](#) before going to the light rail stop
 - No, I just turn up and wait for the next service.
 - No, but I always catch the same service, so I know what time it arrives.
 - Sometimes I turn up and wait, and sometimes I check beforehand.
- Which of the following sources do you use to find information about planned service changes and disruptions? (Select all that apply)**
 - Canberra Metro Operations website
 - Transport Canberra website
 - Access Canberra Call Centre (13 17 10)
 - Facebook
 - Twitter
 - Instagram
 - Transport Canberra Journey Planner
 - Google Maps
 - Apple Maps
 - Canberra Metro Operations E-news
 - Transport Canberra E-news
 - Passenger information displays at light rail stops
 - Passenger announcements at light rail stops
 - Temporary signage at light rail stops
 - I don't look for service changes or disruptions
- How satisfied are you with the information provided about planned service changes and disruptions?**
 - Scale of 1 to 10
- If you were already at the light rail stop and there was a service disruption, do you know how to find the nearest light rail replacement bus stop?**
 - Yes
 - No (?) **On every light rail platform you will find a map locating the nearest light rail replacement bus stop.**

Part 4 - CMET Additional Questions

- Since the COVID pandemic, are you more hesitant about travelling on the light rail?**
 - Yes
 - No
 - Unsure
- Have your travel patterns changed as a result of the COVID pandemic? (Select all that apply)**
 - Yes - I don't travel in peak
 - Yes - I don't travel as often as I used to, before the pandemic
 - Yes - I work from home
 - Yes - I drive my car
 - Yes - I walk or cycle more often
 - Yes - Other

- No - My travel patterns haven't changed
- Do you use any of the following park and ride locations along the light rail alignment?**
 - Gungahlin Town Centre
 - Exhibition Park (EPIC)
 - Well Station Drive
 - Lyneham (opposite Swinden Street)
 - None
 - If yes (selection of any P&Rs): How satisfied are you with the park and ride(s) experience?**
 - Scale of 1 to 10
 - If no: Why don't you use the P&R's? (Select all that apply)**
 - I don't have a car
 - Light Rail is within walking distance
 - I catch a bus to light rail
 - I ride a bike to light rail
 - There is often not enough space
 - The locations are not suitable for me
 - I didn't know about them
 - I don't know how to get a permit
 - Other