

KANTAR PUBLIC

Canberra Light Rail Customer Satisfaction Survey 2021

Prepared for Canberra Metro
Operations

Erin Maher, Phil Detoya
263406515
17 March 2021



Contents

Executive Summary	3
Methodology	5
Research Results	7
Knowledge and use of Light Rail	7
Satisfaction with Light Rail and likelihood to recommend	16
Appendix: demographics and questionnaire	29



Executive Summary

Executive Summary

- The most common purpose for using Light Rail was for work (42%).
- More than two in three respondents walked to their Light Rail stop (67%).
- The majority (72%) of respondents had previously used public transport before Light Rail services commenced, and most (70%) were likely to use public transport now that Light Rail is available.
- Very few people (16%) had used the free wi-fi on Light Rail.
- About half (55%) of respondents were aware of off-peak fare discounts, however 71% said that they would not influence when they chose to travel.
- Fewer than half (42%) of respondents were aware that a defibrillator was on board Light Rail.
- Satisfaction was high across customer service, reliability, safety and security, ease of use and cleanliness:
 - Cleanliness (98% satisfied or very satisfied)
 - Reliability (97% satisfied or very satisfied)
 - Ease of use (97% satisfied or very satisfied)
 - Safety and security (93% satisfied or very satisfied)
 - Customer service (95% satisfied or very satisfied)
- Likelihood to recommend Light Rail to friends or family was also high, with four in five being very likely to recommend (80%) and 16% being likely to recommend (96% overall)

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=1,279 total responses
- LOI was 3.5 minutes
- Fieldwork was conducted from 15 February 2021 – 28 February 2021, between all hours of operation and across different stops
- 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.

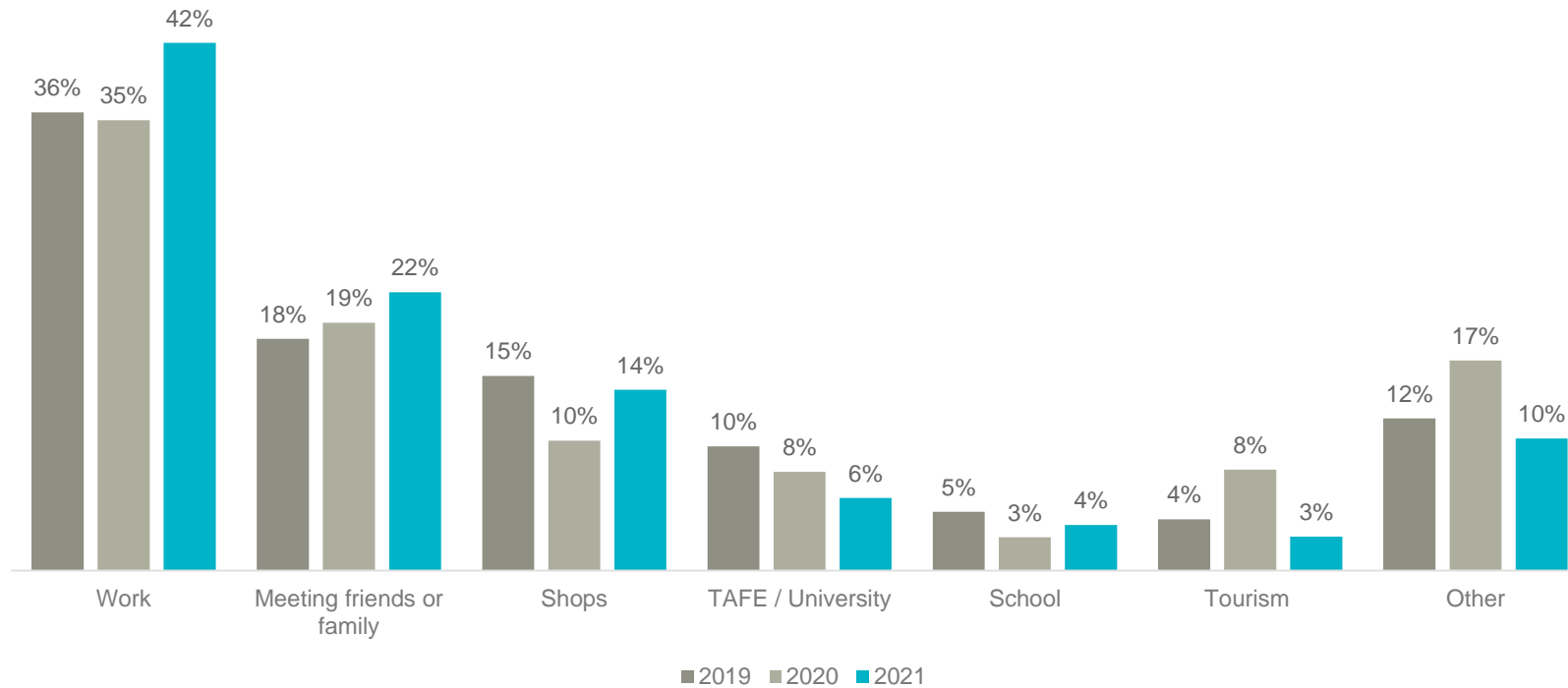
Note: Where numbers are omitted throughout this report, the corresponding result is <1%

Knowledge and use of Light Rail

Main purpose of Light Rail journey

Work continued to be the most commonly cited reason for using Light Rail and appeared to be growing. A significantly greater proportion of respondents reported work as their main purpose of Light Rail travel in February 2021 compared with the previous two years.

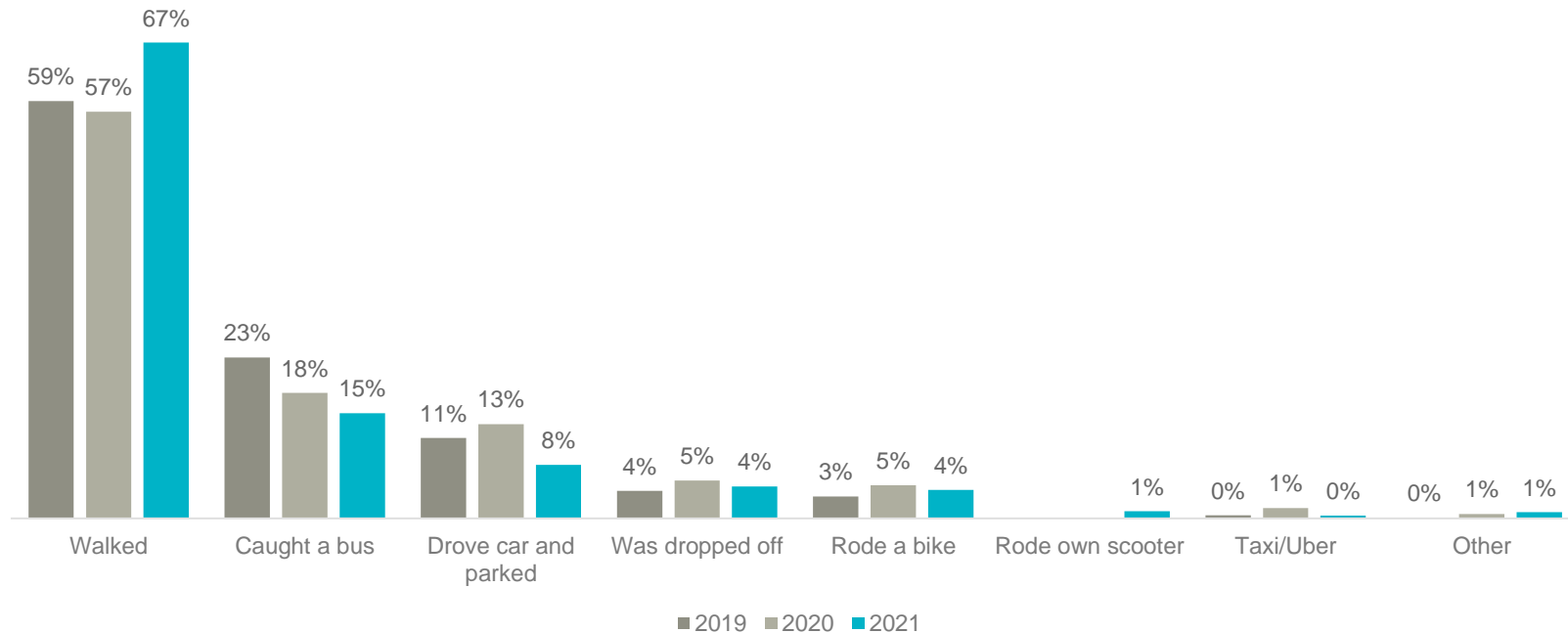
This was in contrast to a decline in the proportion of respondents travelling for university or TAFE and for tourism this year compared with the previous two years.



Transport method taken to get to Light Rail stop

Walking continued to be the most common method of transport to Light Rail stops with two in three respondents opting to walk to their Light Rail stop.

Catching a bus and driving to Light Rail stops appeared to be declining in popularity with a significantly smaller proportion of respondents using these methods of transport in 2021 compared with the previous two years.

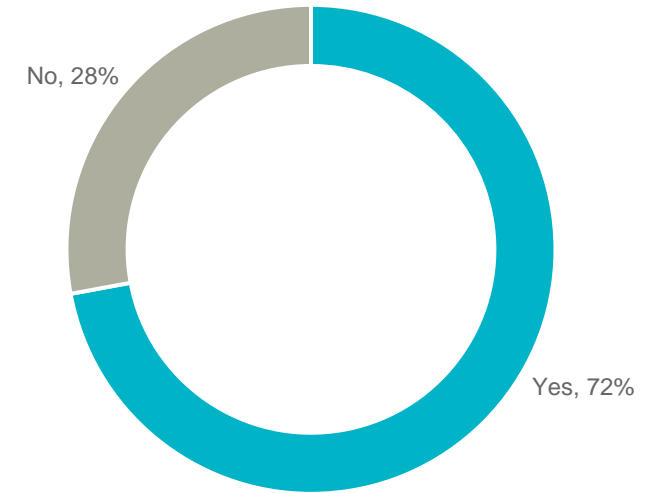


Use of public transport before Light Rail

The overwhelming majority (72%) of respondents had previously used public transport before Light Rail services commenced in 2019.

More respondents from the 16 – 24 year group (four in five; 79%) and those attending university or TAFE (five in six; 85%) had previously used public transport compared with other groups.

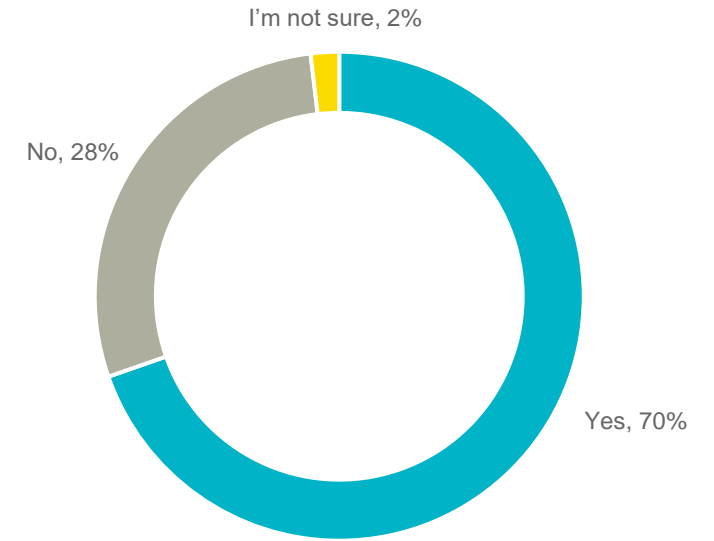
Similarly, more respondents aged 25-34 (34%) as well as those whose purpose of the journey was to meet friends and family (34%) started using public transport when the Light Rail was introduced, compared with other groups.



	TOTAL	GENDER		AGE					PURPOSE OF JOURNEY						
		Male	Female	16-24	25-34	35-49	50-64	65+	Work	Meeting friends or family	Shops	TAFE / University	School	Tourism	Other
YES	72%	75%	70%	79%	66%	71%	72%	72%	72%	66%	74%	85%	74%	62%	77%
NO	28%	25%	30%	21%	34%	29%	28%	28%	28%	34%	26%	15%	26%	38%	23%
Base n=	1279	565	714	382	371	279	155	92	531	280	182	73	46	34	133

Likelihood of using public transport now that Light Rail is available

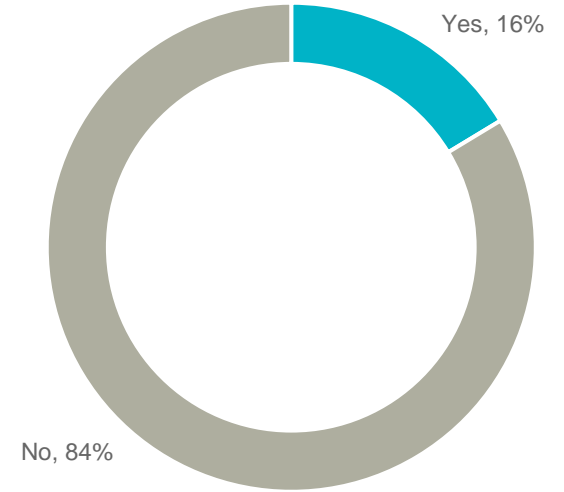
Respondents across all gender, age and purpose of journey groups reported a high likelihood (70%) of using public transport now that Light Rail is available.



	TOTAL	GENDER		AGE					PURPOSE OF JOURNEY						
		Male	Female	16-24	25-34	35-49	50-64	65+	Work	Meeting friends or family	Shops	TAFE / University	School	Tourism	Other
YES	70%	67%	72%	71%	72%	66%	68%	68%	72%	65%	63%	75%	70%	82%	73%
NO	28%	32%	26%	27%	26%	33%	29%	29%	27%	32%	34%	25%	28%	18%	25%
I'm Not Sure	2%	1%	2%	2%	2%	2%	3%	2%	1%	3%	3%	-	2%	-	2%
Base n=	1279	565	714	382	371	279	155	92	531	280	182	73	46	34	133

Use of free Wi-Fi on Light Rail

There was limited use of the free Wi-fi on Light Rail across all gender, age, and purpose of journey groups, with only one in six people responding that they had used this service.



	TOTAL	GENDER		AGE					PURPOSE OF JOURNEY						
		Male	Female	16-24	25-34	35-49	50-64	65+	Work	Meeting friends or family	Shops	TAFE / University	School	Tourism	Other
YES	16%	17%	16%	18%	14%	17%	20%	10%	18%	12%	19%	16%	24%	9%	16%
NO	84%	83%	84%	82%	86%	83%	80%	90%	82%	88%	81%	84%	76%	91%	84%
Base n=	1279	565	714	382	371	279	155	92	531	280	182	73	46	34	133

Awareness of off-peak fare discounts

There was some awareness of off-peak fare discounts among respondents, with just over half (55%) of all respondents aware of this offering.

More respondents aged 35-64 had greater awareness of this discount compared with other groups. The youngest respondents (16-24 years) were much less aware of these discounts than other groups.

More respondents travelling for work were aware of the off-peak fare discount (60%). In contrast more of those who were travelling for school (70%) or for tourism (65%) were not aware of these discounts compared with other travellers.



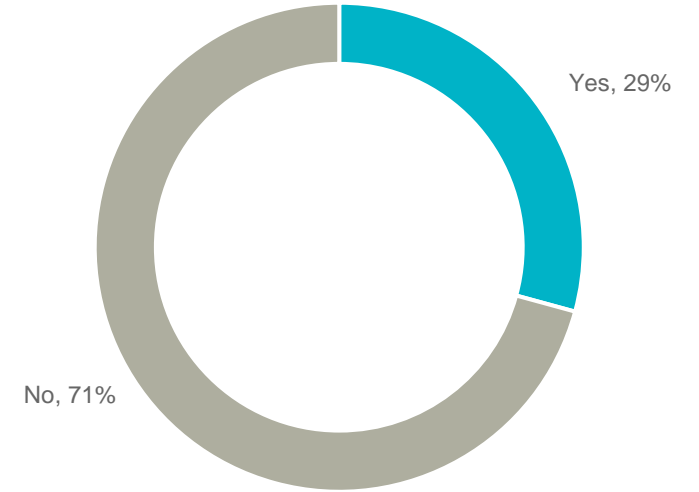
	TOTAL	GENDER		AGE					PURPOSE OF JOURNEY						
		Male	Female	16-24	25-34	35-49	50-64	65+	Work	Meeting friends or family	Shops	TAFE / University	School	Tourism	Other
YES	55%	56%	54%	45%	54%	63%	66%	60%	60%	58%	54%	55%	30%	35%	50%
NO	45%	44%	46%	55%	46%	37%	34%	40%	40%	43%	46%	45%	70%	65%	50%
Base n=	1279	565	714	382	371	279	155	92	531	280	182	73	46	34	133

Influence of off-peak fare discounts on travelling time

Although a large percentage of respondents were not aware of off-peak fare discounts, the majority of respondents (71%) indicated that off-peak fare discounts would not influence when they chose to travel.

This was especially true for those who were travelling to work, with three in four of these respondents reporting it would not influence when they chose to travel.

On the other hand, those who were travelling to meet friends or family were more likely than other groups to be influenced by an off-peak fare discount.



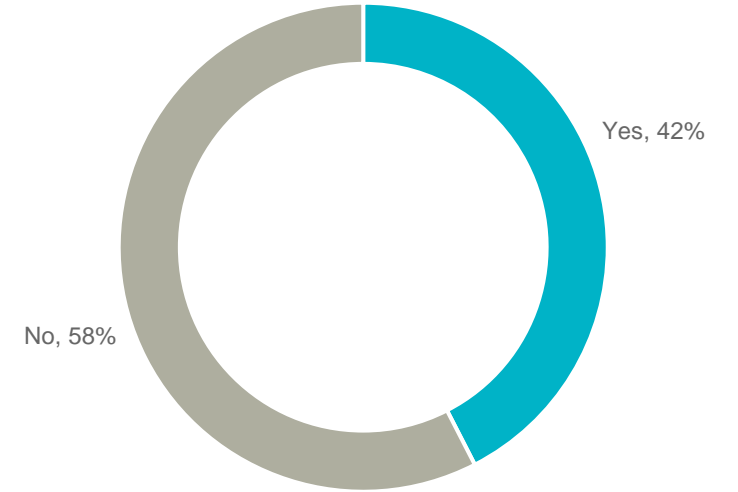
	TOTAL	GENDER		AGE					PURPOSE OF JOURNEY						
		Male	Female	16-24	25-34	35-49	50-64	65+	Work	Meeting friends or family	Shops	TAFE / University	School	Tourism	Other
YES	29%	27%	31%	26%	29%	29%	32%	36%	25%	36%	36%	30%	13%	21%	30%
NO	71%	73%	69%	74%	71%	71%	68%	64%	75%	64%	64%	70%	87%	79%	70%
Base n=	1279	565	714	382	371	279	155	92	531	280	182	73	46	34	133

Awareness of defibrillators on board

Fewer than half (42%) of respondents were aware that a defibrillator was on board Light Rail.

Those aged 50-64 had a *greater* awareness (61%) than other groups, while the youngest respondents (aged 16-24) had a significantly *lower* awareness (34%).

Furthermore, those travelling to school were significantly less aware (20%), while those travelling to work were significantly more aware of defibrillators on board (48%).

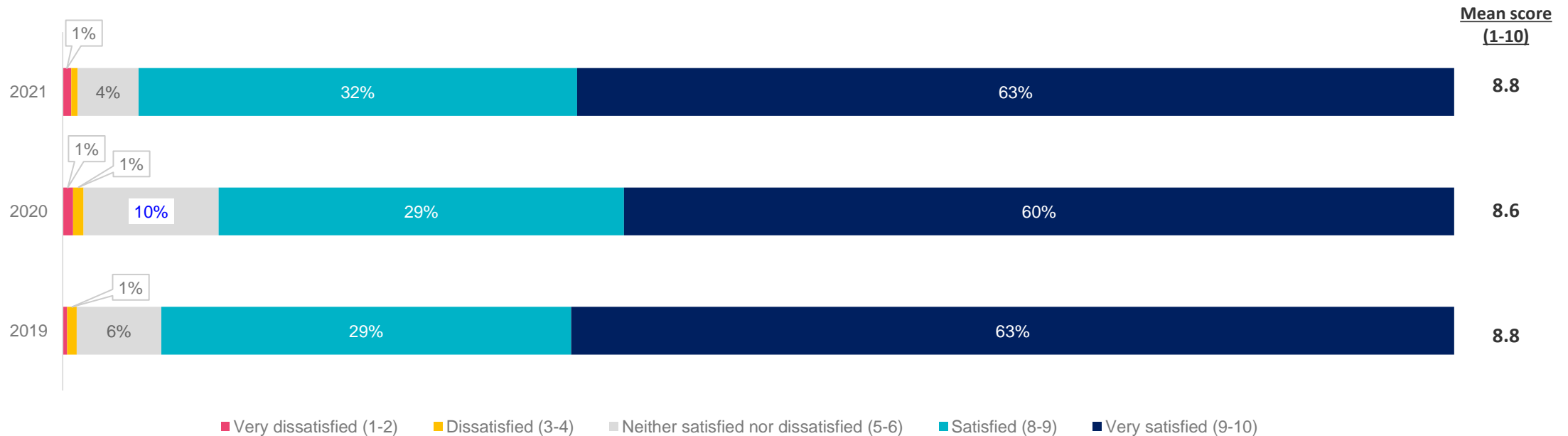


	TOTAL	GENDER		AGE					PURPOSE OF JOURNEY						
		Male	Female	16-24	25-34	35-49	50-64	65+	Work	Meeting friends or family	Shops	TAFE / University	School	Tourism	Other
YES	42%	45%	40%	34%	42%	42%	61%	49%	48%	42%	40%	45%	20%	26%	36%
NO	58%	55%	60%	66%	58%	58%	39%	51%	52%	58%	60%	55%	80%	74%	64%
Base n=	1279	565	714	382	371	279	155	92	531	280	182	73	46	34	133

Satisfaction with Light Rail
and likelihood to
recommend

Satisfaction with the customer service of Light Rail staff

Overall, satisfaction with customer service of Light Rail staff remained high and constant over the past three years with 95% of respondents satisfied or very satisfied.



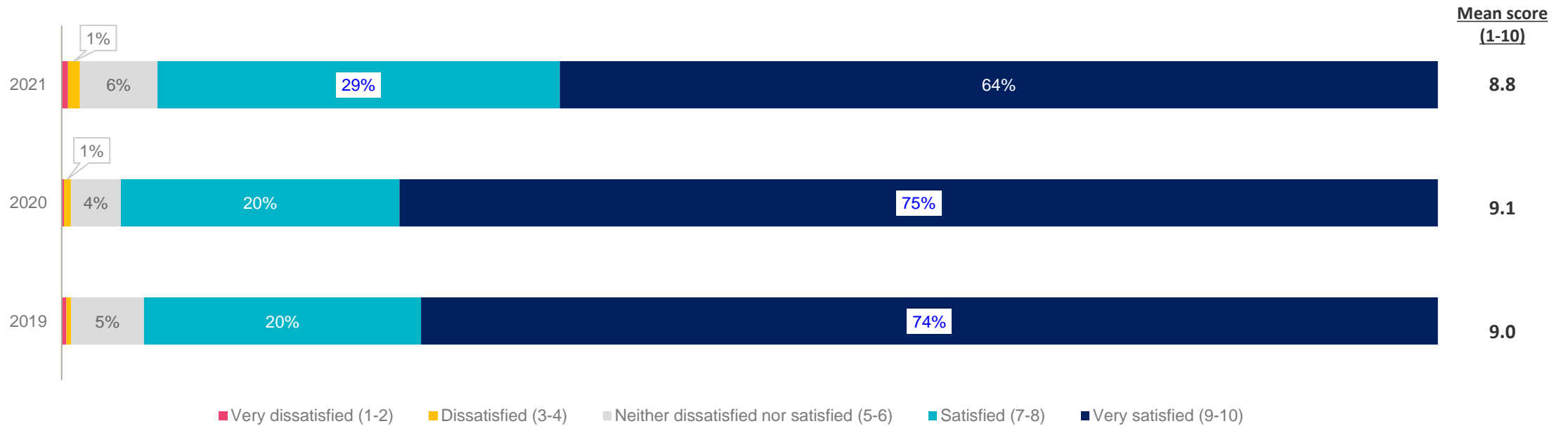
Satisfaction with the customer service of Light Rail staff

Satisfaction with customer service of Light Rail staff was significantly greater for those aged 65+ (mean rating of 9.3) compared with the other groups (mean rating <9).

	TOTAL	GENDER		AGE					PURPOSE OF JOURNEY						
		Male	Female	16-24	25-34	35-49	50-64	65+	Work	Meeting friends or family	Shops	TAFE / University	School	Tourism	Other
Very Satisfied (9-10)	63%	61%	65%	62%	59%	62%	66%	80%	64%	62%	63%	63%	50%	62%	68%
Satisfied (7-8)	32%	34%	30%	35%	35%	30%	28%	16%	31%	31%	32%	32%	48%	29%	28%
Neither satisfied nor dissatisfied (5-6)	4%	5%	4%	3%	5%	7%	4%	3%	5%	5%	4%	5%	2%	6%	2%
Dissatisfied (3-4)	0%	0%	1%	1%	1%	0%	1%	-	0%	0%	1%	-	-	3%	1%
Very dissatisfied (1-2)	1%	1%	1%	1%	1%	1%	1%	-	1%	1%	-	-	-	-	1%
Mean score (1-10)	8.8	8.8	8.9	8.8	8.7	8.7	8.9	9.3	8.8	8.8	8.8	8.9	8.5	8.7	9.0
Base n=	1279	565	714	382	371	279	155	92	531	280	182	73	46	34	133

Satisfaction with the safety and security when travelling on Light Rail

The average rating of satisfaction and security was slightly lower in 2021 (8.8) compared with the previous two years. However, satisfaction still remained high with 93% of respondents satisfied or very satisfied with the safety and security when travelling on Light Rail.



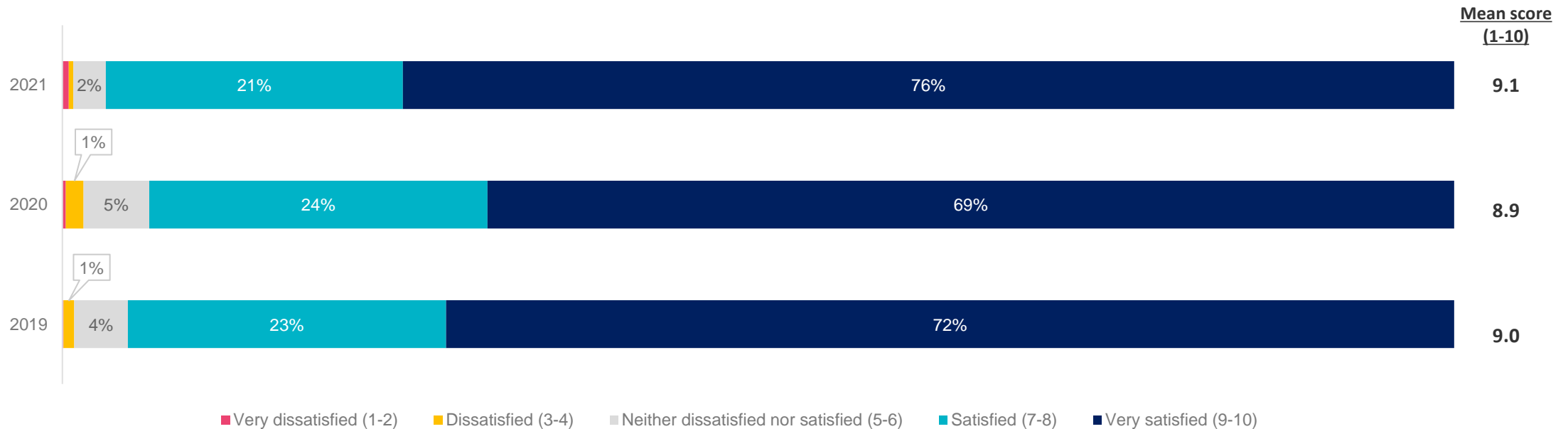
Satisfaction with the safety and security when travelling on Light Rail

Participants responded consistently across gender, age and purpose of journey groups for how satisfied they were with the safety and security on Light Rail.

	TOTAL	GENDER		AGE					PURPOSE OF JOURNEY						
		Male	Female	16-24	25-34	35-49	50-64	65+	Work	Meeting friends or family	Shops	TAFE / University	School	Tourism	Other
Very Satisfied (9-10)	64%	63%	64%	63%	62%	62%	64%	77%	60%	66%	63%	71%	57%	71%	70%
Satisfied (7-8)	29%	31%	28%	31%	30%	30%	30%	15%	31%	28%	31%	26%	39%	24%	24%
Neither satisfied nor dissatisfied (5-6)	6%	5%	6%	5%	6%	7%	5%	7%	7%	5%	5%	3%	4%	6%	5%
Dissatisfied (3-4)	1%	1%	1%	1%	2%	0%	-	1%	1%	1%	1%	-	-	-	1%
Very dissatisfied (1-2)	0%	1%	0%	1%	0%	1%	1%	-	1%	-	-	-	-	-	1%
Mean score (1-10)	8.8	8.8	8.8	8.8	8.7	8.7	8.8	9.1	8.6	8.8	8.8	9.0	8.8	9.1	8.9
Base n=	1279	565	714	382	371	279	155	92	531	280	182	73	46	34	133

Satisfaction with the reliability of Light Rail

Satisfaction with the reliability of Light Rail has improved over the past three years with 97% of respondents reporting they were satisfied or very satisfied in 2021 compared with 93% in 2020. Furthermore, the proportion of respondents who were very satisfied increased significantly from 69% in 2020 to 76% in 2021.



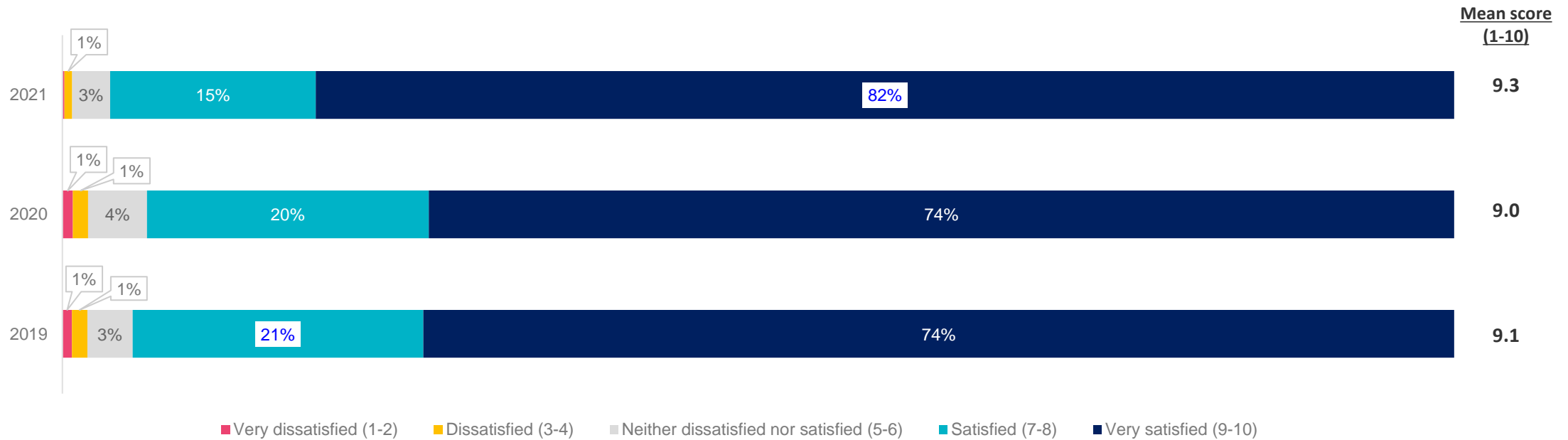
Satisfaction with the reliability of Light Rail

Participants responded consistently across gender, age and purpose of journey for how satisfied they were with the reliability of Light Rail.

	TOTAL	GENDER		AGE					PURPOSE OF JOURNEY						
		Male	Female	16-24	25-34	35-49	50-64	65+	Work	Meeting friends or family	Shops	TAFE / University	School	Tourism	Other
Very Satisfied (9-10)	76%	75%	76%	74%	72%	77%	77%	86%	77%	70%	73%	78%	74%	82%	82%
Satisfied (7-8)	21%	21%	21%	23%	25%	21%	18%	11%	21%	25%	25%	19%	24%	18%	14%
Neither satisfied nor dissatisfied (5-6)	2%	2%	3%	3%	2%	1%	4%	3%	2%	3%	3%	1%	2%	-	4%
Dissatisfied (3-4)	0%	0%	0%	0%	1%	-	1%	-	0%	1%	-	-	-	-	-
Very dissatisfied (1-2)	0%	1%	0%	0%	1%	0%	-	-	0%	1%	-	1%	-	-	1%
Mean score (1-10)	9.1	9.1	9.1	9.1	9.0	9.2	9.2	9.4	9.2	9.0	9.0	9.1	9.0	9.4	9.2
Base n=	1279	565	714	382	371	279	155	92	531	280	182	73	46	34	133

Satisfaction with ease of using Light Rail

Average satisfaction with ease of using Light Rail was greater in 2021, compared with the previous two years, with an average score of 9.3. Additionally, the proportion of respondents who are very satisfied (82%) improved significantly compared to the previous two years.



Satisfaction with ease of using Light Rail

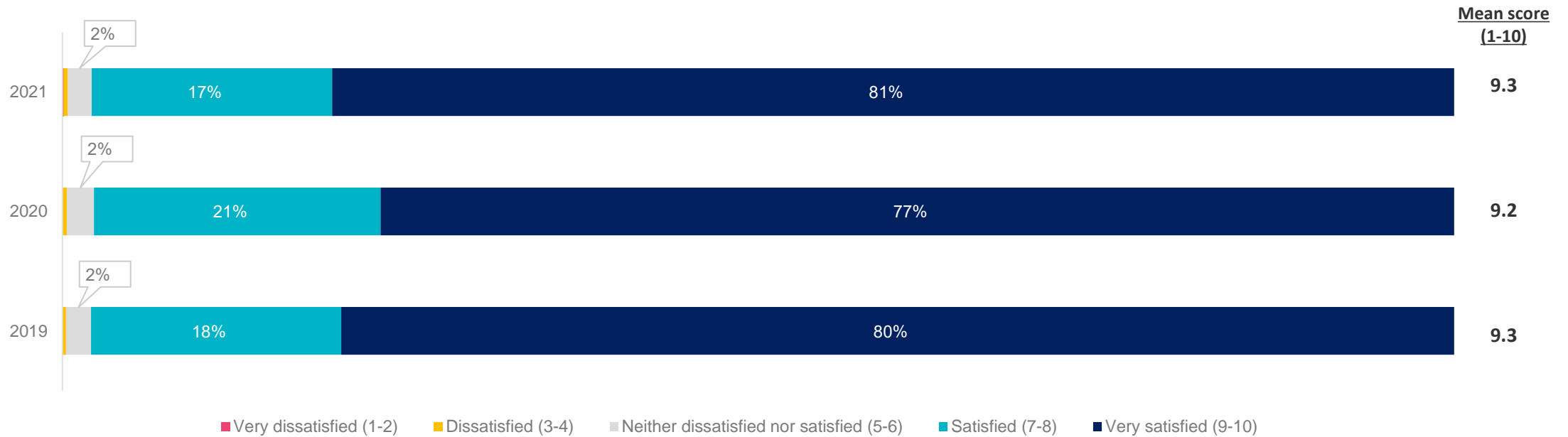
The older demographic (65+ years) reported greater satisfaction with the ease of using Light Rail (average rating 9.6) compared with other groups.

Likewise, those who used Light Rail for tourism reported greater satisfaction with the ease of using Light Rail (average rating 9.7).

	TOTAL	GENDER		AGE					PURPOSE OF JOURNEY						
		Male	Female	16-24	25-34	35-49	50-64	65+	Work	Meeting friends or family	Shops	TAFE / University	School	Tourism	Other
Very Satisfied (9-10)	82%	82%	82%	84%	80%	80%	82%	89%	80%	79%	82%	89%	80%	88%	89%
Satisfied (7-8)	15%	14%	15%	14%	15%	16%	15%	10%	16%	17%	16%	11%	15%	12%	7%
Neither satisfied nor dissatisfied (5-6)	3%	3%	3%	2%	4%	4%	2%	1%	3%	2%	2%	-	4%	-	5%
Dissatisfied (3-4)	1%	1%	1%	0%	1%	-	1%	-	1%	1%	-	-	-	-	-
Very dissatisfied (1-2)	0%	0%	0%	-	-	0%	1%	-	0%	0%	-	-	-	-	-
Mean score (1-10)	9.3	9.3	9.3	9.3	9.2	9.2	9.3	9.6	9.3	9.2	9.3	9.5	9.2	9.7	9.5
Base n=	1279	565	714	382	371	279	155	92	531	280	182	73	46	34	133

Satisfaction with cleanliness on board Light Rail and at the stops

Satisfaction with the cleanliness on board Light Rail and at stops remained consistently high throughout 2021, 2020 and 2019 with 98% of respondents reporting they were satisfied or very satisfied.



Satisfaction with cleanliness on board Light Rail and at the stops

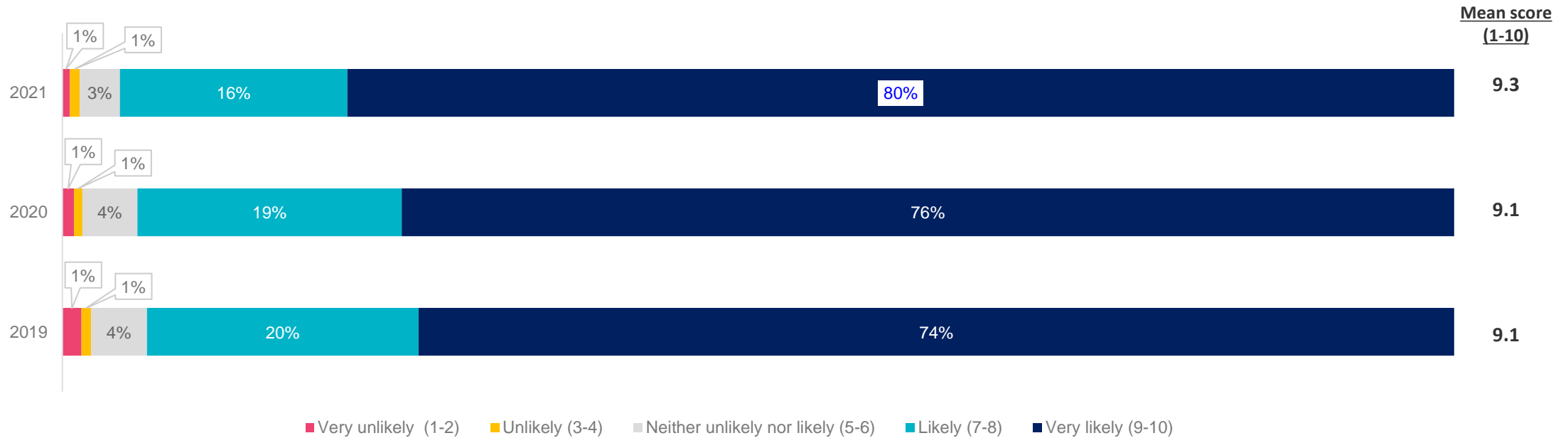
The older demographic (65+ years) reported greater average satisfaction with the cleanliness on board Light Rail and at the stops (average rating 9.6) compared with other groups.

While the majority of respondents were satisfied or very satisfied with the cleanliness of Light Rail, passengers who were travelling for tourism, reported greater dissatisfaction with the cleanliness (3% very dissatisfied) than other groups (<1% very dissatisfied).

	TOTAL	GENDER		AGE					PURPOSE OF JOURNEY						
		Male	Female	16-24	25-34	35-49	50-64	65+	Work	Meeting friends or family	Shops	TAFE / University	School	Tourism	Other
Very Satisfied (9-10)	81%	78%	82%	80%	81%	78%	81%	89%	77%	79%	85%	86%	83%	88%	85%
Satisfied (7-8)	17%	19%	16%	17%	17%	20%	16%	11%	21%	20%	12%	12%	15%	9%	11%
Neither satisfied nor dissatisfied (5-6)	2%	3%	1%	2%	2%	2%	1%	-	2%	1%	3%	1%	2%	-	4%
Dissatisfied (3-4)	0%	0%	0%	-	0%	0%	1%	-	1%	-	1%	-	-	-	-
Very dissatisfied (1-2)	0%	-	0%	-	-	-	1%	-	-	-	-	-	-	3%	-
Mean score (1-10)	9.3	9.2	9.3	9.3	9.3	9.2	9.3	9.6	9.2	9.3	9.3	9.3	9.3	9.3	9.4
Base n=	1279	565	714	382	371	279	155	92	531	280	182	73	46	34	133

Likelihood of recommending Light Rail to friends and family

Almost all respondents would recommend Light Rail to their friends and family (95%) which is consistent with previous years. However, there has been a significant increase in the proportion of people who would be very likely to recommend Light Rail in 2021 compared with previous years. This increase has seen the average rating rise from 9.1 in 2019 and 2020 to 9.3 in 2021.



Likelihood of recommending Light Rail to friends and family

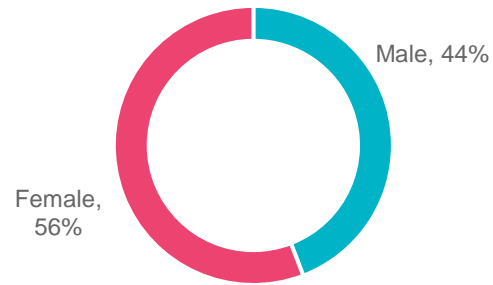
Respondents reported consistently high ratings across gender, age and purpose of journey groups. Respondents travelling for tourism offered a higher average rating (9.9) than other groups with a different purpose of journey.

	TOTAL	GENDER		AGE					PURPOSE OF JOURNEY						
		Male	Female	16-24	25-34	35-49	50-64	65+	Work	Meeting friends or family	Shops	TAFE / University	School	Tourism	Other
Very likely (9-10)	80%	77%	81%	76%	77%	83%	85%	87%	80%	78%	78%	79%	78%	97%	81%
Likely (7-8)	16%	17%	16%	19%	18%	15%	11%	9%	17%	19%	17%	15%	15%	3%	14%
Neither likely nor unlikely (5-6)	3%	4%	2%	5%	3%	1%	2%	3%	3%	2%	3%	4%	4%	-	5%
Unlikely (3-4)	1%	1%	1%	0%	2%	-	1%	1%	0%	1%	2%	-	2%	-	-
Very unlikely (1-2)	1%	1%	0%	0%	1%	1%	1%	-	0%	1%	1%	1%	-	-	-
Mean score (1-10)	9.3	9.2	9.3	9.1	9.2	9.4	9.4	9.5	9.3	9.2	9.2	9.1	9.2	9.9	9.3
Base n=	1279	565	714	382	371	279	155	92	531	280	182	73	46	34	133

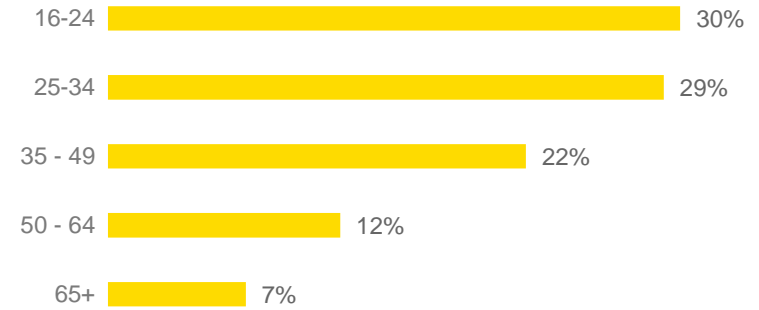
Appendix: Demographics and questionnaire

Respondent profile

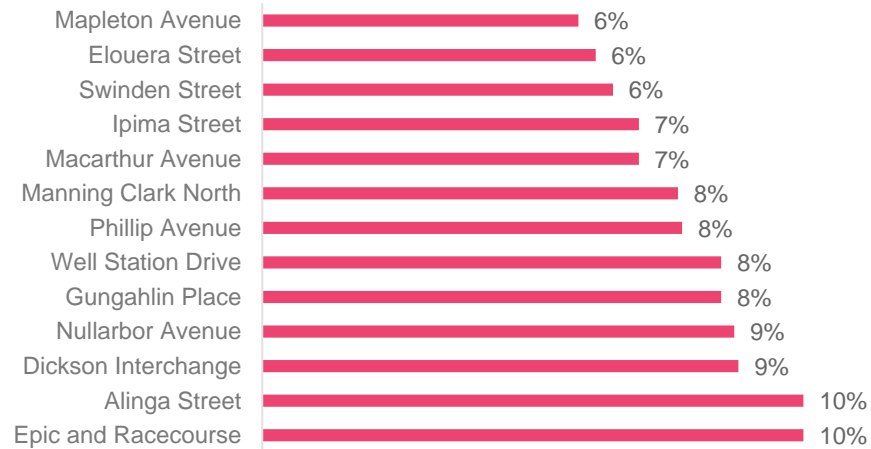
Gender



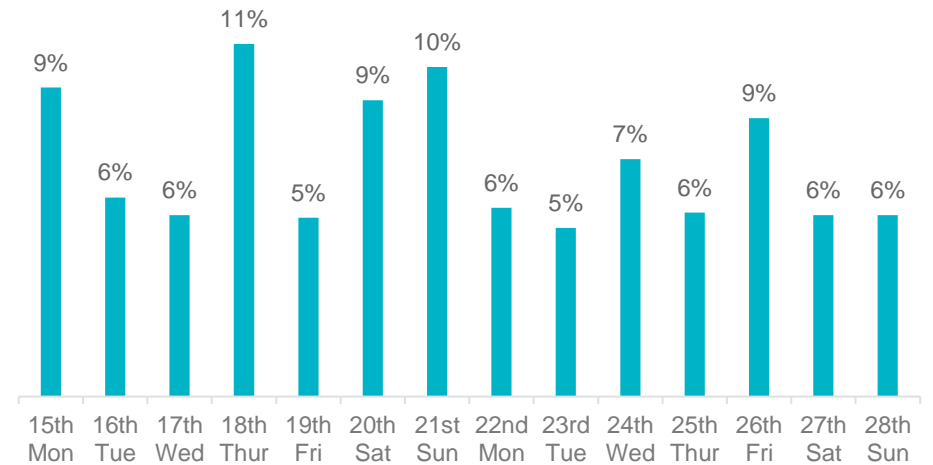
Age groups



Most recent stop



Date of interview (February)



Questionnaire

SCREENING QUESTIONS	
	<p>Record most recent stop</p> <ul style="list-style-type: none"> <input type="radio"/> Gungahlin Place <input type="radio"/> Manning Clark North <input type="radio"/> Mapleton Avenue <input type="radio"/> Nullarbor Avenue <input type="radio"/> Well Station Drive <input type="radio"/> EPIC and Racecourse <input type="radio"/> Phillip Avenue <input type="radio"/> Swindon Street <input type="radio"/> Dickson Interchange <input type="radio"/> Macarthur Avenue <input type="radio"/> Jappa Street <input type="radio"/> Elouera Street <input type="radio"/> Alinga Street
	<p>Record direction of travel and time of day</p> <ul style="list-style-type: none"> <input type="radio"/> North (toward Gungahlin) <input type="radio"/> South (toward City)
	<p>Record perceived gender</p> <ul style="list-style-type: none"> <input type="radio"/> Male <input type="radio"/> Female
	<p>Which of the follow age ranges are you in?</p> <ul style="list-style-type: none"> <input type="radio"/> Under 16 (Terminate) <input type="radio"/> 16-24 <input type="radio"/> 25-34 <input type="radio"/> 35 -49 <input type="radio"/> 50-64 <input type="radio"/> 65+
NEW TC QUESTIONS	
	<p>Had you used public transport before light rail services commenced in April 2019? (Public Transport services includes Transport Canberra Buses)</p> <ul style="list-style-type: none"> <input type="radio"/> Yes <input type="radio"/> No
	<p>Are you more likely to use public transport now that light rail is available?</p> <ul style="list-style-type: none"> <input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> I'm not sure
	<p>Do you use the free Wi-Fi on light rail?</p> <ul style="list-style-type: none"> <input type="radio"/> Yes <input type="radio"/> No
	<p>Are you aware that off-peak fare discounts apply between 9.00am and 4.30pm and after 6.00pm on weekdays?</p> <ul style="list-style-type: none"> <input type="radio"/> Yes <input type="radio"/> No
	<p>Do off-peak fare discounts influence when you decide to travel?</p> <ul style="list-style-type: none"> <input type="radio"/> Yes <input type="radio"/> No

NEW CMET QUESTIONS	
	<p>What is the main purpose of your journey today?</p> <ul style="list-style-type: none"> <input type="radio"/> Work <input type="radio"/> School <input type="radio"/> TAFE / University <input type="radio"/> Shops <input type="radio"/> Meeting with friends or family <input type="radio"/> Tourism <input type="radio"/> Other
	<p>How did you get to the stop today?</p> <ul style="list-style-type: none"> <input type="radio"/> Walked <input type="radio"/> Rode a bike <input type="radio"/> Rode own scooter <input type="radio"/> Hired an e-scooter <input type="radio"/> Drove my car and parked at a Park and Ride <input type="radio"/> Was dropped off (by car, Kiss & Ride etc) <input type="radio"/> Caught a bus <input type="radio"/> Taxi / Uber <input type="radio"/> Other
	<p>Did you know that all light rail vehicles have a defibrillator on board?</p> <ul style="list-style-type: none"> <input type="radio"/> Yes <input type="radio"/> No
CONTRACTUAL QUESTIONS	
<i>(All questions answered using a scale from 1 to 10, where 1 is very dissatisfied and 10 is very satisfied.)</i>	
	How dissatisfied or satisfied are you with the 'customer service of the Light Rail staff'?
	How dissatisfied or satisfied are you with 'safety and security when travelling on Light Rail'?
	How dissatisfied or satisfied are you with the 'reliability of Light Rail in terms of it departing and arriving on time'?
	How dissatisfied or satisfied are you with the 'ease of using Light Rail'?
	How dissatisfied or satisfied are you with the 'cleanliness on board the Light Rail vehicle and at the stops'?
	How likely or unlikely are you to 'recommend Light Rail to your family and friends'?