

KANTAR PUBLIC

Canberra Light Rail Customer Satisfaction Survey March 2023

Prepared for Canberra Metro
Operations

Erin Maher and Kirstin Marr

263407480

19 April 2023



Contents

Executive Summary	3
Methodology	5
Research Results	7
Satisfaction with the Light Rail service and information	7
Use of Light Rail service	15
Satisfaction with Light Rail and likelihood to recommend	24
Appendix: demographics and questionnaire	37



Executive Summary

Executive Summary

- The majority of Light Rail users are satisfied with the temperature inside the Light Rail (95%), with 80% of Light Rail users reporting the temperature as just right, followed by 15% reporting it was too hot. March 2023 has seen a significant increase in Light Rail users reporting they are very satisfied with the temperature inside the Light Rail.
- Most Light Rail users (98%) report being satisfied with the Light Rail service overall, with 68% reporting very satisfied. Among the 98% who report being satisfied, top reported reasons are that the Light Rail service is fast (23%), comfortable (23%), accessible (21%), and reliable (19%).
- Of the 68% of Light Rail users that provided suggestions to help improve the Light Rail service, common suggestions are to increase services (20%), extend the network (17%), and improve security (9%).
- Similar to September 2022 findings, almost two in five (37%) report the main purpose of their Light Rail trip is for paid work, followed by one in six's (15%) main purpose being social activities.
- One in four (26%) report the main reason for using Light Rail is because it is more convenient, followed by to avoid driving (19%) and have no car available (13%).
- One in three (34%) Light Rail users report they would use the bus as alternative transport if Light Rail was unavailable, which is significantly lower than September 2022 (43%). This is followed by 30% reporting they would use a car and 14% reporting they would rideshare.
- Just over four in five (83%) Light Rail users are aware of Emergency Help Points located on the Light Rail and at platforms.
- One in three (34%) Light Rail users report having purchased their Light Rail ticket from a MyWay Retail Agent, followed by 26% having purchased it from a ticket vending machine and 22% online/Transport Canberra Website.
- Satisfaction is high across ease of use, reliability, customer service, cleanliness and safety and security (Performance Target average score of no less than 6.5 is required for each of these metrics):
 - 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)
 - Cleanliness average score 9.0 (96% satisfied or very satisfied - scores 7-10)
 - Safety and security average score 8.8 (94% satisfied or very satisfied - scores 7-10)
 - Customer service average score 8.8 (93% satisfied or very satisfied - scores 7-10)
- Likelihood to recommend Light Rail to friends or family was also high, with 80% being very likely (scores 9-10) to recommend and 16% being likely (scores 7-8) to recommend (96% overall likely to recommend – scores 7-10) with an average score of 9.3 (Performance Target average score of no less than 8 is required for this metric).

Methodology

Methodology

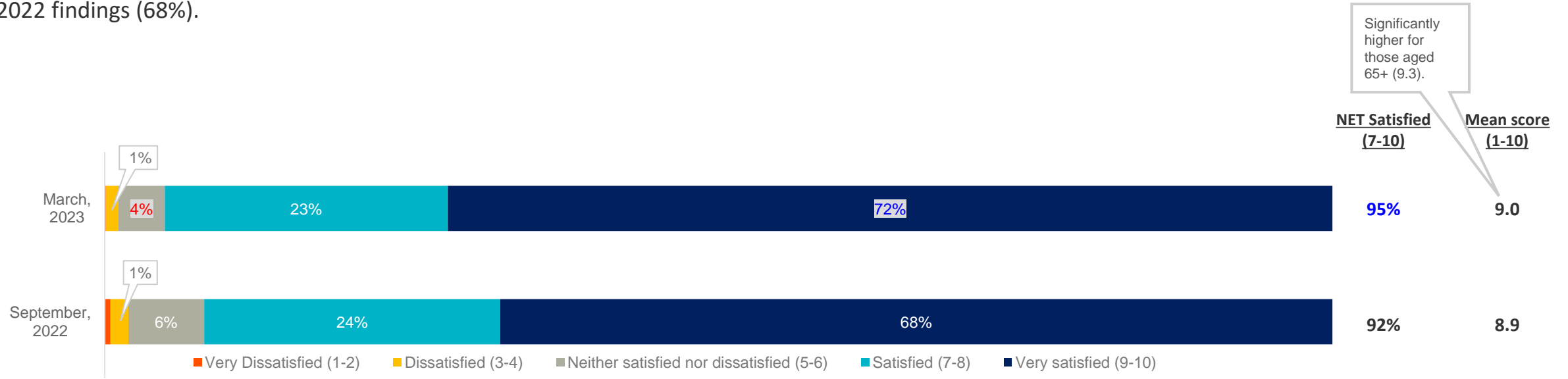
- Kantar Public partnered with Q&A Research to deliver the CMET Customer Satisfaction Survey:
 - Kantar Public are CMET's day-to-day contact, leading on all aspects of research design, analysis and reporting. Q&A Research are responsible for co-ordinating all aspects of fieldwork
- Quantitative questionnaire was completed using iPads on board Light Rail via intercepts
- n=1,270 total responses
- LOI was 3.9 minutes
- Fieldwork was conducted from 15 March 2023 – 28 March 2023, between all hours of operation and across different stops
- Margin of error was 2.66%
- 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)
- In some charts and tables figures may add up to more than 100%. This is either because of rounding effects or a question allowing multiple responses (MR) rather than just a single response (SR)

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

Satisfaction with the Light
Rail service and
information

Satisfaction with temperature inside the Light Rail

When prompted, 95% of Light Rail users report that they are satisfied with the temperature inside the Light Rail, which has seen a significant increase from September 2022 findings (92%). Over two in three, 72%, are very satisfied with the temperature, which has also seen a significant increase from September 2022 findings (68%).



Satisfaction with temperature inside the Light Rail

Satisfaction with the temperature inside the Light Rail is relatively high and consistent across all demographics, with those aged 65+ having a significantly higher average (9.3).

	TOTAL	GENDER		AGE				
		Male	Female	16-24	25-34	35-49	50-64	65+
Very satisfied (9-10)	72%	70%	74%	70%	70%	73%	73%	80%
Satisfied (7-8)	23%	25%	22%	24%	24%	22%	25%	19%
Neither satisfied nor dissatisfied (5-6)	4%	4%	4%	5%	4%	4%	2%	1%
Dissatisfied (3-4)	1%	1%	1%	2%	1%	1%	0%	0%
Very dissatisfied (1-2)	0%	0%	0%	0%	0%	0%	0%	0%
Mean score (1-10)	9.0	9.0	9.0	8.9	8.9	9.1	9.1	9.3
Base n=	1,270	534	736	397	346	228	148	151

Q11. Using a scale from 1 to 10, where 1 is very dissatisfied and 10 is very satisfied, how dissatisfied or satisfied are you with the temperature inside the light rail vehicle today?

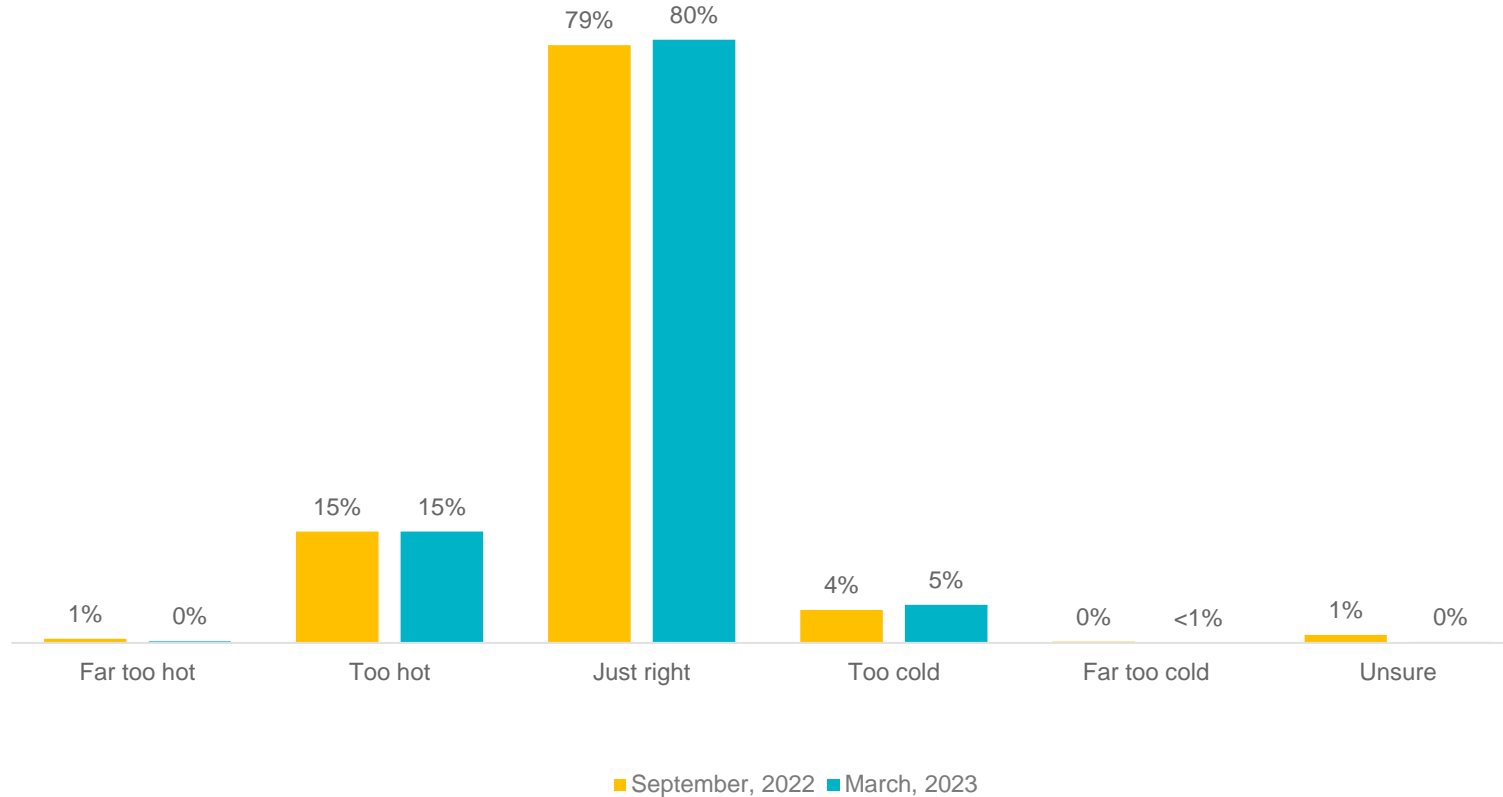
Base: All respondents March 2023 n=1,270

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

Significantly lower than other groups

Temperature inside the Light Rail

Consistent with September 2022 findings, when prompted to describe the temperature inside the Light Rail, the vast majority of Light Rail users (80%) describe it as just right. This is followed by 15% of Light Rail users reporting it as too hot.



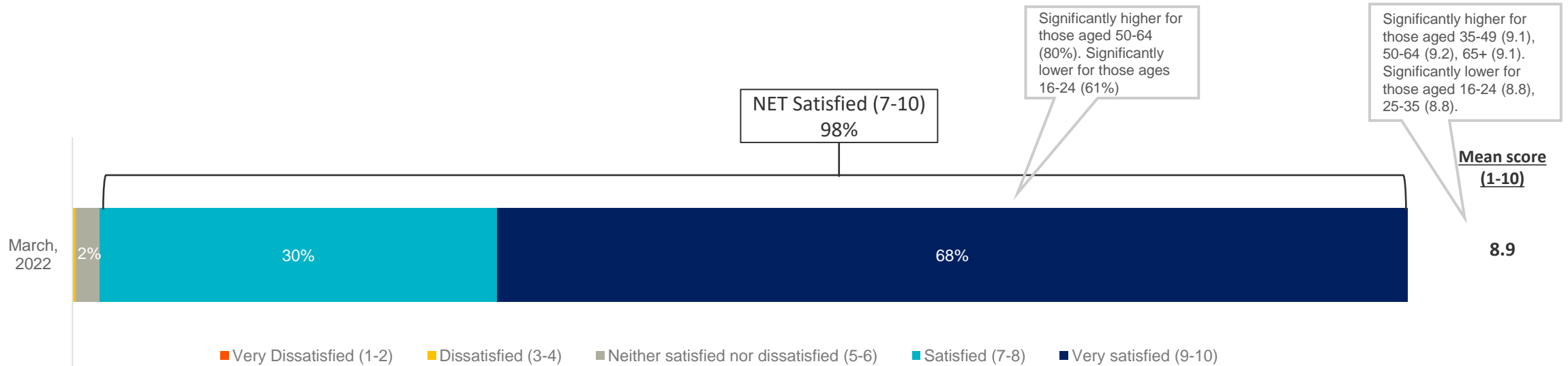
Temperature inside the Light Rail

Light Rail users' perceptions of the temperature inside the Light Rail is consistent across all demographics.

	TOTAL	GENDER		AGE				
		Male	Female	16-24	25-34	35-49	50-64	65+
Far too hot	<1%	<1%	<1%	1%	<1%	0%	0%	0%
Too hot	15%	17%	13%	17%	14%	16%	16%	9%
Just right	80%	77%	82%	76%	82%	77%	80%	89%
Too cold	5%	5%	5%	6%	3%	7%	5%	3%
Far too cold	<1%	0%	<1%	0%	0%	<1%	0%	0%
Unsure	<1%	<1%	0%	1%	0%	0%	0%	0%
Base n=	1,270	534	736	397	346	228	148	151

Overall satisfaction with Light Rail service

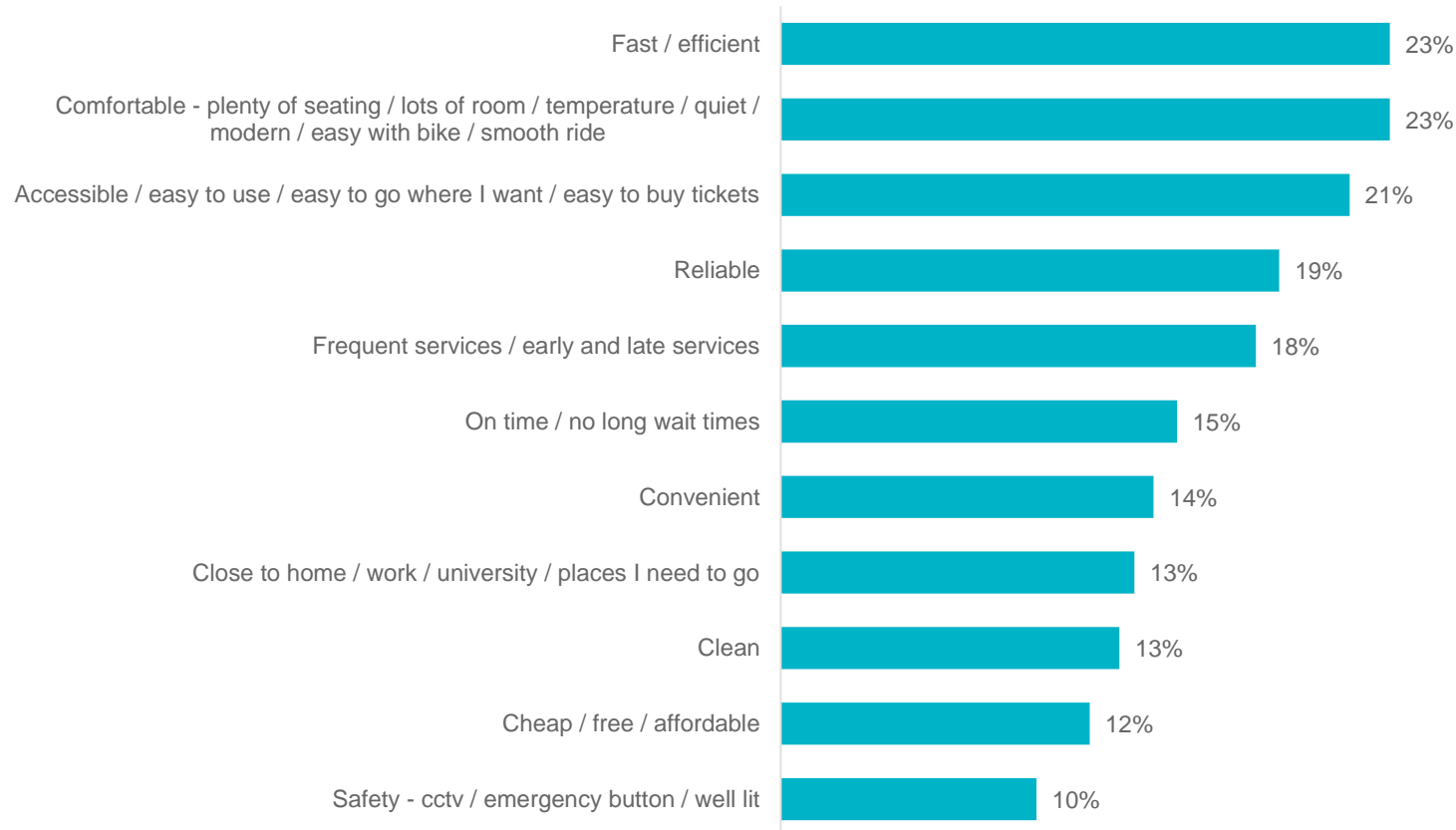
When Light Rail users are asked to rate their overall satisfaction with the Light Rail service, the vast majority (98%) report being satisfied (7-10), with two in three (68%) reporting they are very satisfied. Those aged 50-64 are significantly more likely to report they are very satisfied (80%).



Reason for overall satisfaction with Light Rail service

Of the 98% of Light Rail users who reported they are satisfied (7-10) with the overall Light Rail service, the top reported reasons are that the Light Rail is fast/efficient (23%), followed by the Light Rail is comfortable (23%), accessible/easy to use (21%) and reliable (19%).

Top reasons for satisfaction with Light Rail service (98% reported satisfied (7-10, n=1,244).



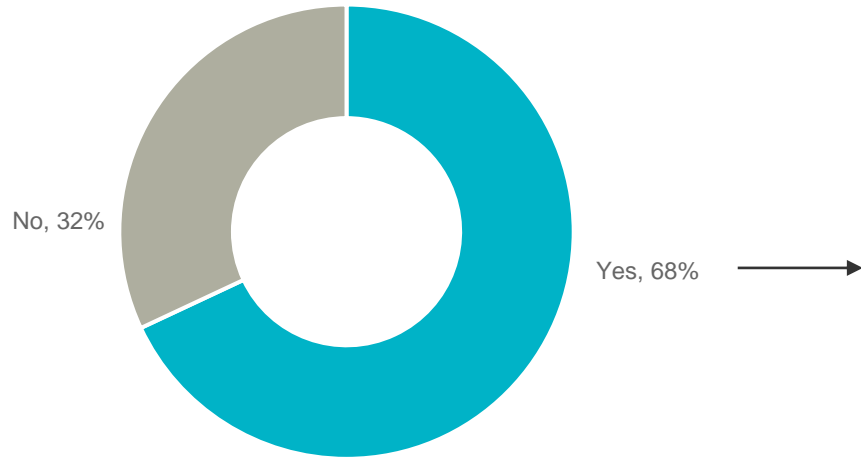
Of the 2% (n=26*) who reported they were dissatisfied or neither satisfied or dissatisfied with Light Rail service, some common reasons relate to:

- Accessibility
- Customer service
- Proximity to key locations such as home and work
- Frequency of service
- Cleanliness
- Overcrowded
- Cost

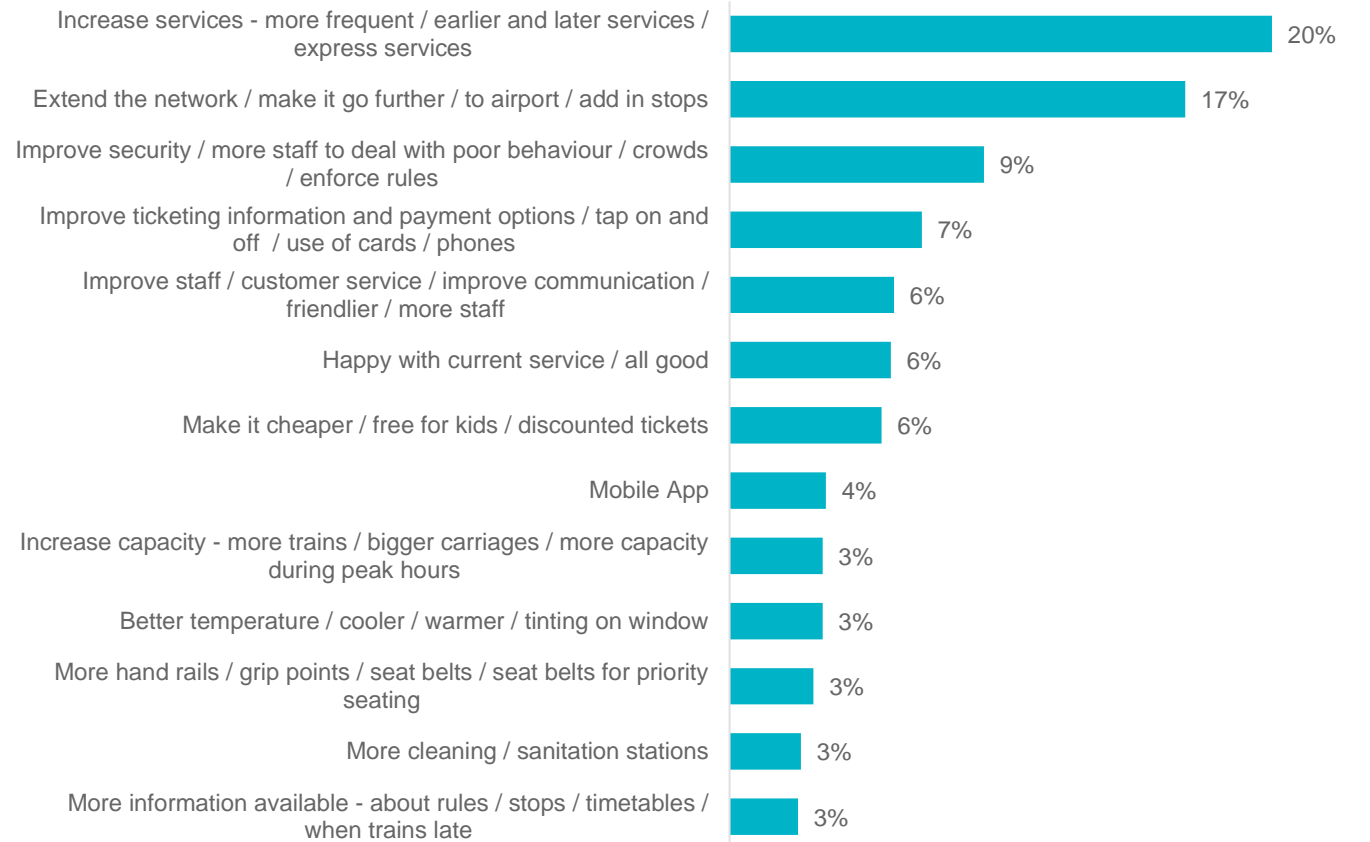
Suggestions to help improve Light Rail service

When asked to provide a suggestion to help improve the Light Rail service, two in three (68%) provided a suggestion. Of those who provided a suggestion, the top suggestion was to increase services (20%), followed by extend the network (17%) and improve security (9%).

Provided a suggestion to help improve Light Rail service



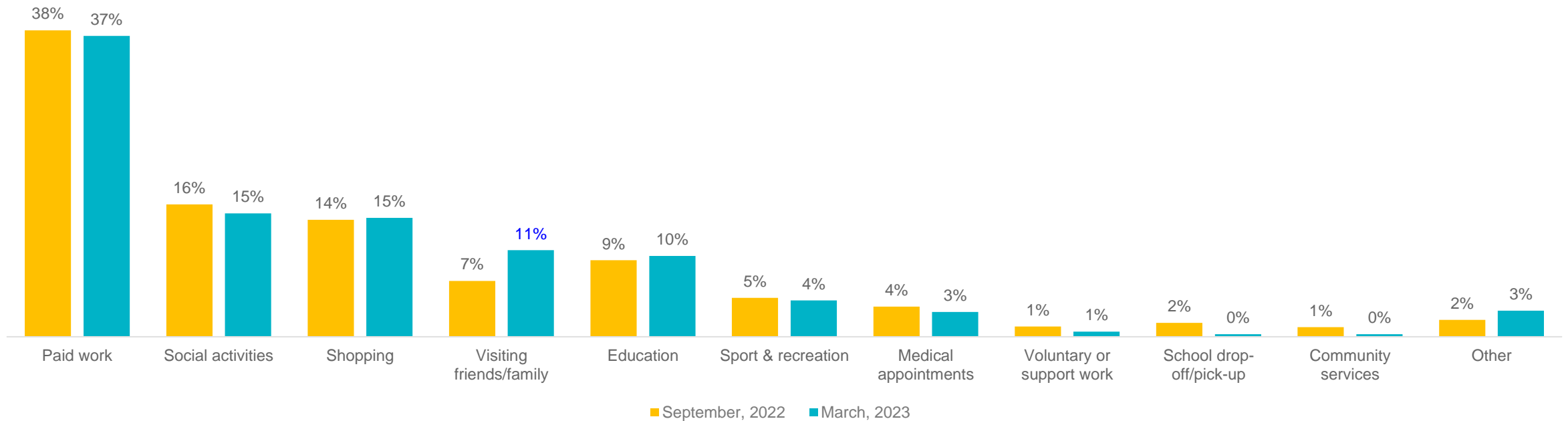
Provided a suggestion to help improve Light Rail service (n=864)



Use of Light Rail service

Main purpose of Light Rail trip

Similar to September 2022 findings, the most common main purpose of a Light Rail trip is for paid work (37%), followed by social activities (15%) and shopping (15%). March 2023 findings saw a significant increase from September 2022 in Light Rail users reporting the main purpose of their trip is for visiting friends/family (11% and 7%, respectively).



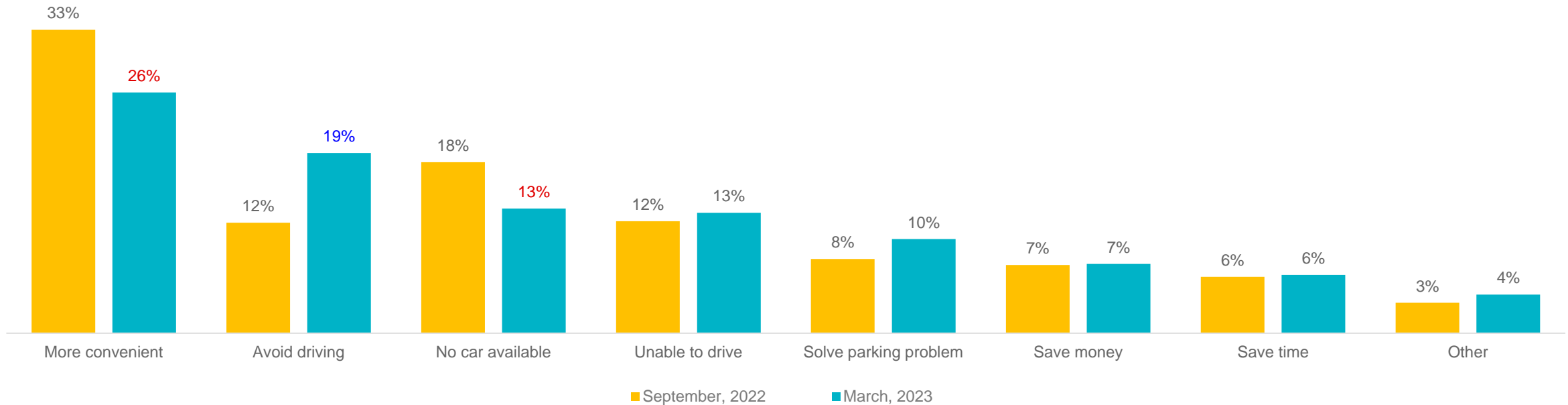
Main purpose of Light Rail trip

There are a few significant differences among demographics for the main purpose of travelling on the Light Rail. Paid work is significantly more likely to be the main purpose of the Light Rail trip for those aged 25-34 (45%) and 35-49 (51%). Those aged 65+ are significantly more likely to be travelling on the Light Rail for social activities (23%), shopping (29%) and visiting friends/family (21%).

	TOTAL	GENDER		AGE				
		Male	Female	16-24	25-34	35-49	50-64	65+
Paid work	37%	36%	38%	36%	45%	51%	37%	3%
Social activities	15%	16%	15%	15%	13%	16%	12%	23%
Shopping	15%	10%	18%	8%	15%	15%	16%	29%
Visiting friends/family	11%	12%	10%	10%	10%	6%	11%	21%
Education	10%	11%	9%	26%	5%	2%	1%	0%
Sport & recreation	4%	6%	4%	3%	5%	5%	7%	2%
Medical appointments	3%	3%	3%	1%	2%	2%	6%	12%
Voluntary or support work	1%	0%	1%	0%	1%	0%	1%	1%
School drop-off/pick-up	0%	0%	1%	0%	1%	0%	1%	0%
Community services	0%	1%	0%	0%	0%	0%	1%	1%
Other	3%	5%	2%	2%	2%	2%	7%	8%
Base n=	1,270	534	736	397	346	228	148	151

Main reason for using Light Rail

Despite a significant decrease from September 2022 findings, the most commonly reported reason for using the Light Rail continues to be because it is more convenient (26%), followed by to avoid driving (19%), which has seen a significant increase since September 2022.



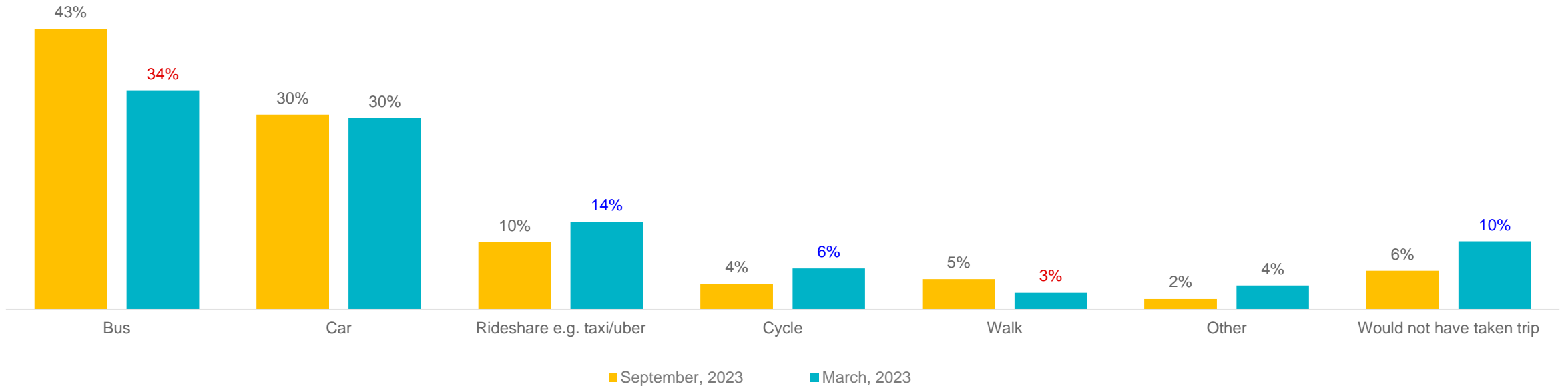
Main reason for using Light Rail

There are a number of significant difference among demographics for the main reason for using Light Rail. Males are significantly more likely to report because it is more convenient (33%). Additionally, females and those aged 65+ are more likely to report to avoid driving (22% and 27%, respectively).

	TOTAL	GENDER		AGE				
		Male	Female	16-24	25-34	35-49	50-64	65+
More convenient	26%	33%	21%	28%	26%	25%	28%	20%
Avoid driving	19%	16%	22%	14%	21%	20%	20%	27%
No car available	13%	14%	13%	15%	15%	8%	14%	15%
Unable to drive	13%	12%	14%	19%	8%	10%	10%	17%
Solve parking problem	10%	7%	13%	6%	9%	19%	11%	9%
Save money	7%	7%	8%	7%	10%	7%	7%	5%
Save time	6%	6%	7%	8%	7%	7%	5%	1%
Other	4%	6%	3%	3%	4%	5%	5%	6%
Base n=	1,270	534	736	397	346	228	148	151

Alternative transport if Light Rail was unavailable

When respondents are asked how they would have taken their trip if no Light Rail service was available, one third (34%) report they would use the bus which is significantly lower than September 2022 findings (43%). This is followed by 30% saying they would use car and 14% saying they would use rideshare.



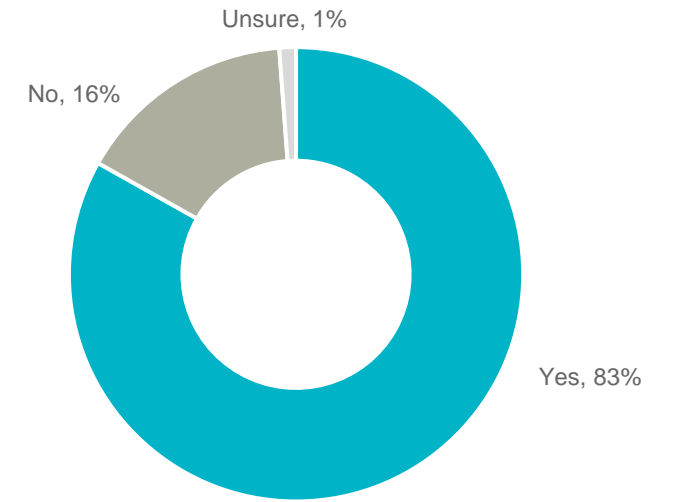
Alternative transport if Light Rail was unavailable

Alternative transport options if Light Rail was unavailable varies among demographic groups, with those aged 16-24 being significantly more likely to report using the bus (45%), females and those aged 35-49 being significantly more likely to report using a car (33% and 40%, respectively) and those aged 25-34 being significantly more likely to report using rideshare (18%).

	TOTAL	GENDER		AGE				
		Male	Female	16-24	25-34	35-49	50-64	65+
Bus	34%	35%	33%	45%	32%	31%	30%	19%
Car	30%	24%	33%	17%	34%	40%	37%	30%
Rideshare e.g. taxi/uber	14%	12%	15%	14%	18%	11%	11%	9%
Cycle	6%	10%	4%	10%	6%	5%	6%	0%
Walk	3%	3%	2%	4%	3%	3%	1%	1%
Other	4%	5%	3%	6%	2%	4%	3%	0%
Would not have taken trip	10%	10%	10%	4%	6%	7%	11%	42%
Base n=	1,270	534	736	397	346	228	148	151

Awareness of Emergency Help Points

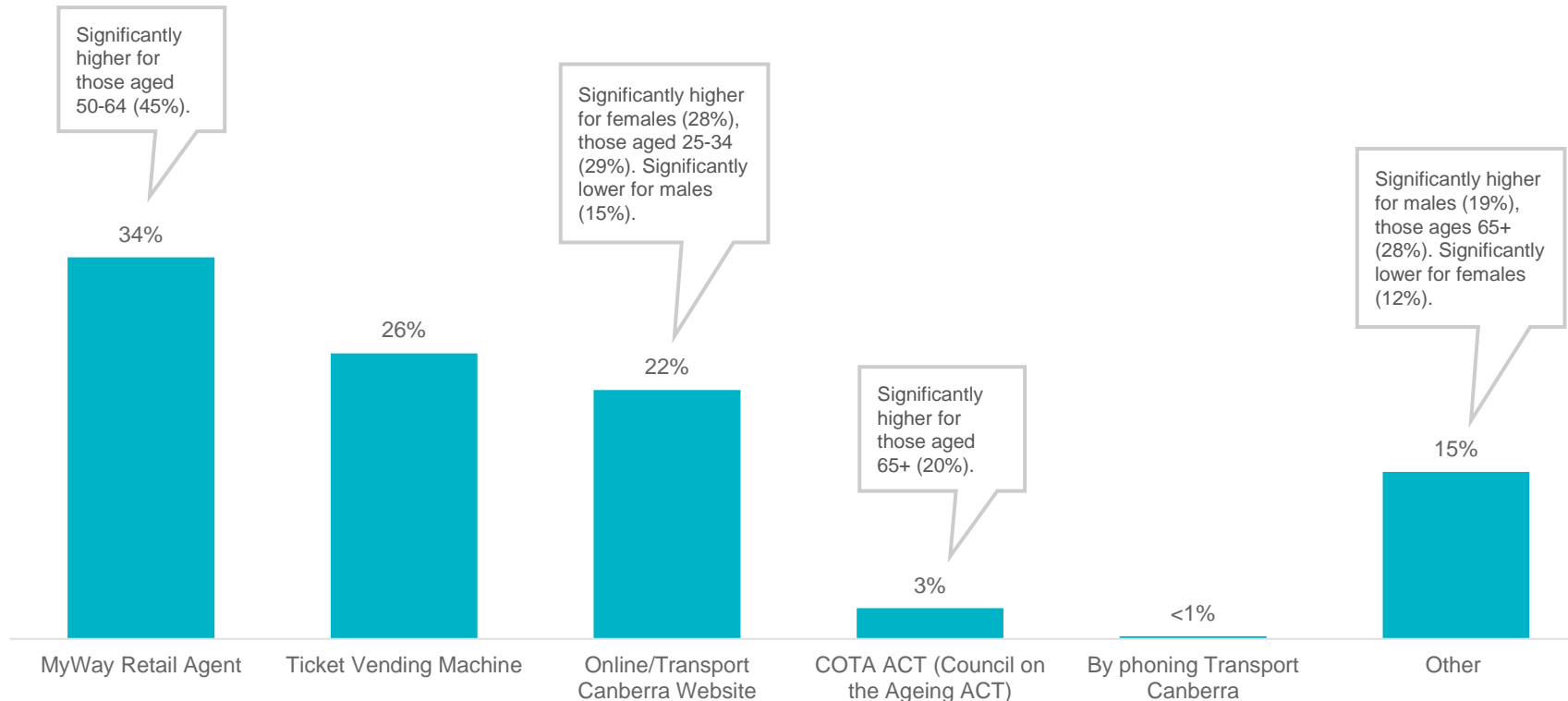
When Light Rail users are asked if they are aware of Emergency Help Points, four in five (83%) are aware. Awareness is high and consistent across demographics.



	TOTAL	GENDER		AGE				
		Male	Female	16-24	25-34	35-49	50-64	65+
YES	83%	83%	83%	84%	83%	83%	81%	83%
NO	16%	16%	15%	15%	15%	16%	18%	17%
UNSURE	1%	1%	1%	1%	2%	1%	1%	0%
Base n=	1,270	534	736	397	346	228	148	151

Purchase location of ticket / MyWay card

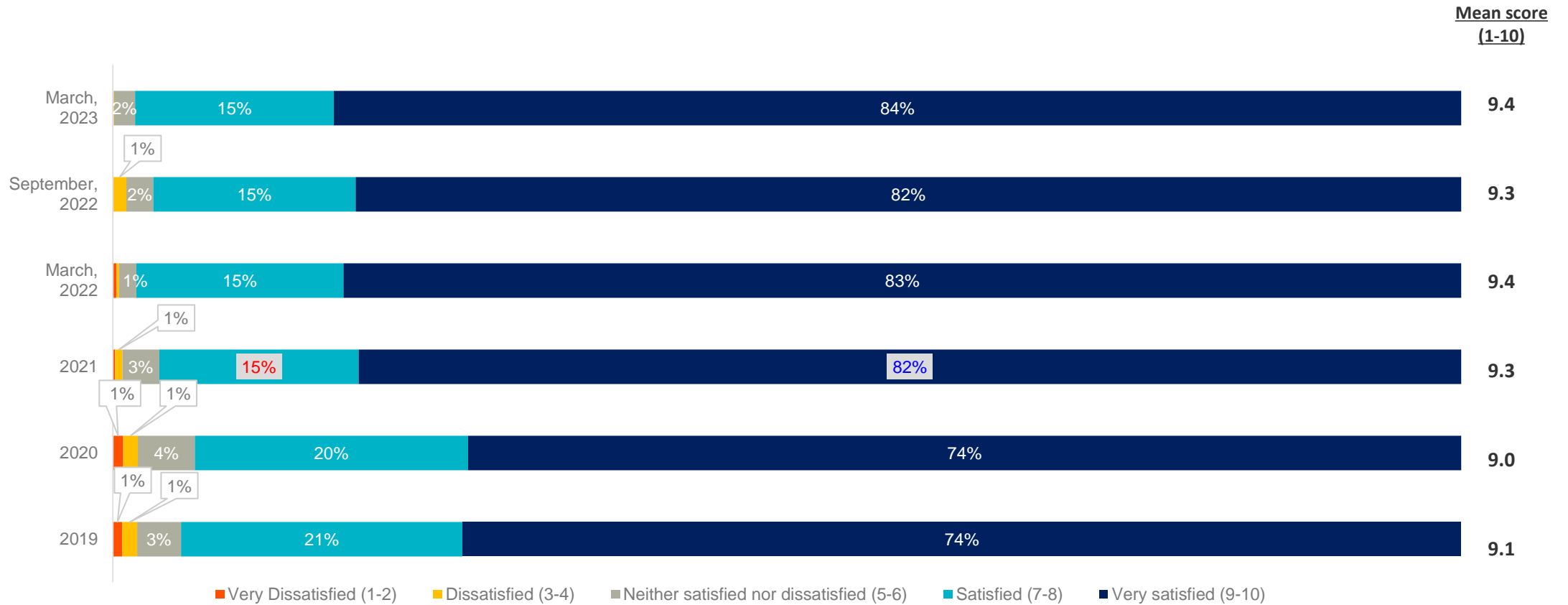
One in three Light Rail users report they purchased their ticket using a MyWay Retail Agent (34%), this is significantly higher for those aged 50-64 (45%). The second most common place Light Rail users purchased their ticket was using a ticket vending machine (26%), followed by online/Transport Canberra Website (22%).



Satisfaction with Light Rail
and likelihood to recommend

Satisfaction with ease of using Light Rail

Light Rail users reporting they are very satisfied with the ease of using Light Rail has slightly increased from September 2022, with 84% of Light Rail users reporting they are very satisfied. Overall satisfaction also slightly increased in March 2023, with 98% of Light Rail users reporting they are either satisfied or very satisfied (compared to 96% in September 2022).



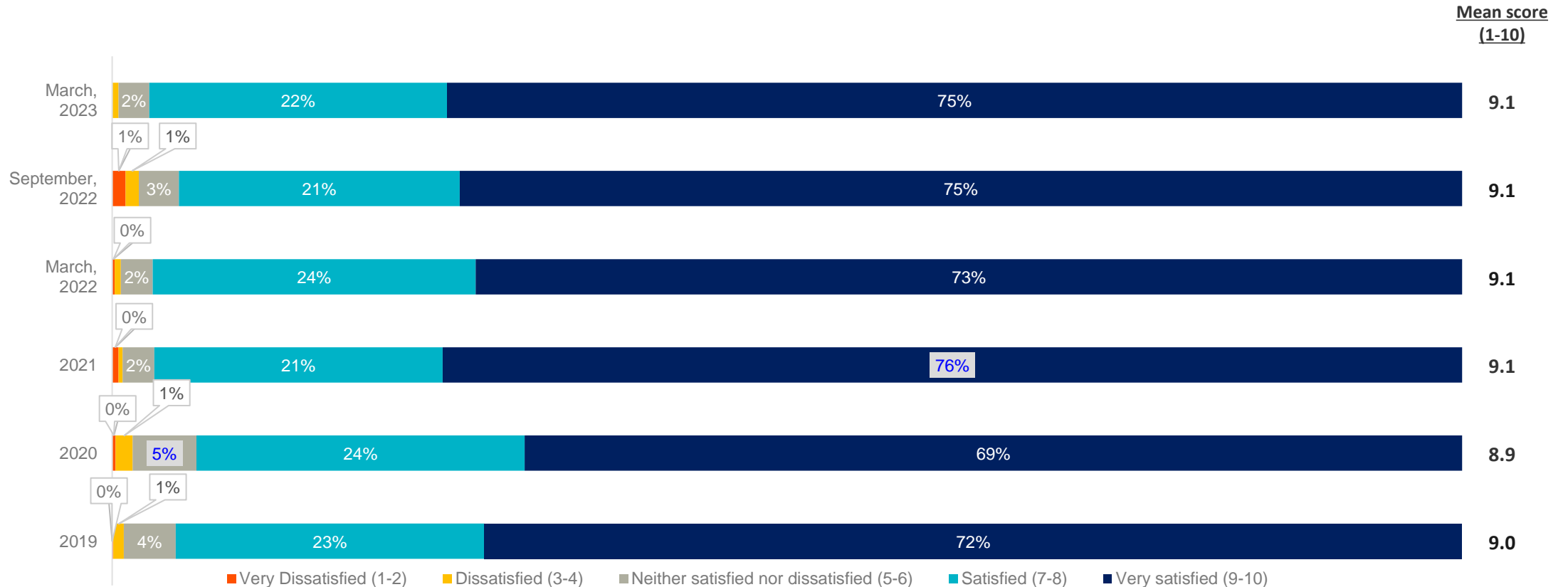
Satisfaction with ease of using Light Rail

Overall, the satisfaction with the ease of using Light Rail is very high across all demographics with no significant differences.

	TOTAL	GENDER		AGE				
		Male	Female	16-24	25-34	35-49	50-64	65+
Very satisfied (9-10)	84%	83%	84%	84%	84%	84%	86%	80%
Satisfied (7-8)	15%	15%	15%	14%	14%	16%	13%	17%
Neither satisfied nor dissatisfied (5-6)	2%	2%	1%	2%	2%	0%	0%	3%
Dissatisfied (3-4)	0%	0%	0%	0%	0%	0%	1%	0%
Very dissatisfied (1-2)	0%	0%	0%	0%	0%	0%	0%	0%
Mean score (1-10)	9.4	9.4	9.5	9.4	9.4	9.5	9.5	9.4
Base n=	1,270	534	736	397	346	228	148	151

Satisfaction with the reliability of Light Rail

Remaining consistent with previous waves of research, Light Rail users' overall satisfaction with the reliability of Light Rail is very high (97%), with 75% reporting they are very satisfied.



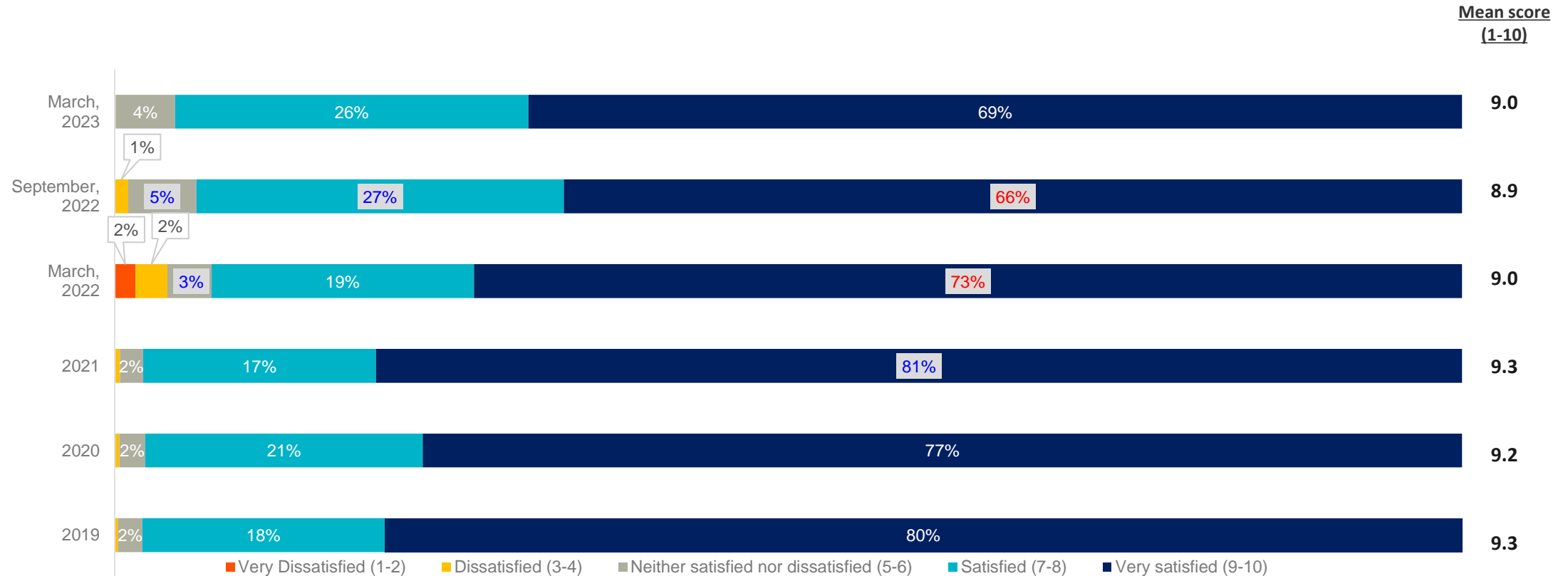
Satisfaction with the reliability of Light Rail

Satisfaction with the reliability of Light Rail in terms of it departing and arriving on time is quite consistent across all demographic groups, similar to previous waves of research. However, Light Rail users aged 16-24 have a significantly lower average (9.0) and those aged 65 and over have a significantly higher average (9.4).

	TOTAL	GENDER		AGE				
		Male	Female	16-24	25-34	35-49	50-64	65+
Very satisfied (9-10)	75%	75%	75%	70%	76%	79%	78%	80%
Satisfied (7-8)	22%	22%	22%	26%	21%	18%	22%	19%
Neither satisfied nor dissatisfied (5-6)	2%	2%	2%	3%	3%	2%	0%	1%
Dissatisfied (3-4)	0%	1%	0%	1%	1%	0%	1%	0%
Very dissatisfied (1-2)	0%	0%	0%	0%	0%	0%	0%	0%
Mean score (1-10)	9.1	9.1	9.1	9.0	9.1	9.2	9.2	9.4
Base n=	1,270	534	736	397	346	228	148	151

Satisfaction with cleanliness on board Light Rail and at the stops

March 2023 has seen a slight increase in Light Rail users reporting they are very satisfied with the cleanliness on board Light Rail and at the stops (69%) after seeing significant decreases in the previous two waves of research. March 2023 has also seen a slight increase in overall satisfaction compared to September 2022 (96% and 94%, respectively).



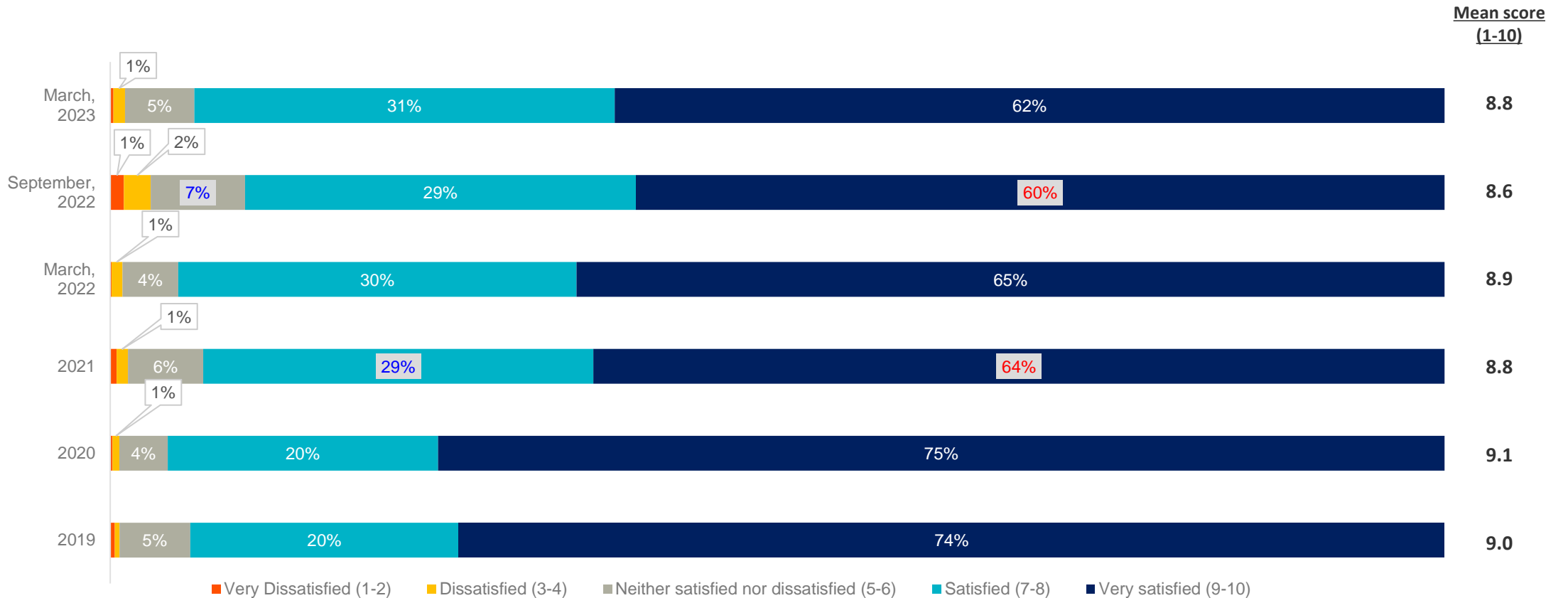
Satisfaction with cleanliness on board Light Rail and at the stops

Satisfaction with cleanliness on board Light Rail and at the stops is high and consistent across all demographic groups.

	TOTAL	GENDER		AGE				
		Male	Female	16-24	25-34	35-49	50-64	65+
Very satisfied (9-10)	69%	68%	70%	64%	68%	72%	72%	79%
Satisfied (7-8)	26%	28%	25%	31%	27%	24%	24%	17%
Neither satisfied nor dissatisfied (5-6)	4%	4%	5%	5%	5%	4%	3%	4%
Dissatisfied (3-4)	0%	0%	0%	0%	0%	0%	0%	0%
Very dissatisfied (1-2)	0%	0%	0%	0%	0%	0%	0%	0%
Mean score (1-10)	9.0	9.0	9.0	8.9	9.0	9.0	9.1	9.3
Base n=	1,270	534	736	397	346	228	148	151

Satisfaction with the safety and security when travelling on Light Rail

Overall satisfaction with the safety and security when travelling on Light Rail remains high with 94% of Light Rail users reporting they are satisfied. March 2023 has seen a slight increase from September 2022 in Light Rail users reporting they are satisfied and very satisfied with the safety and security when travelling on the Light Rail.



Satisfaction with the safety and security when travelling on Light Rail

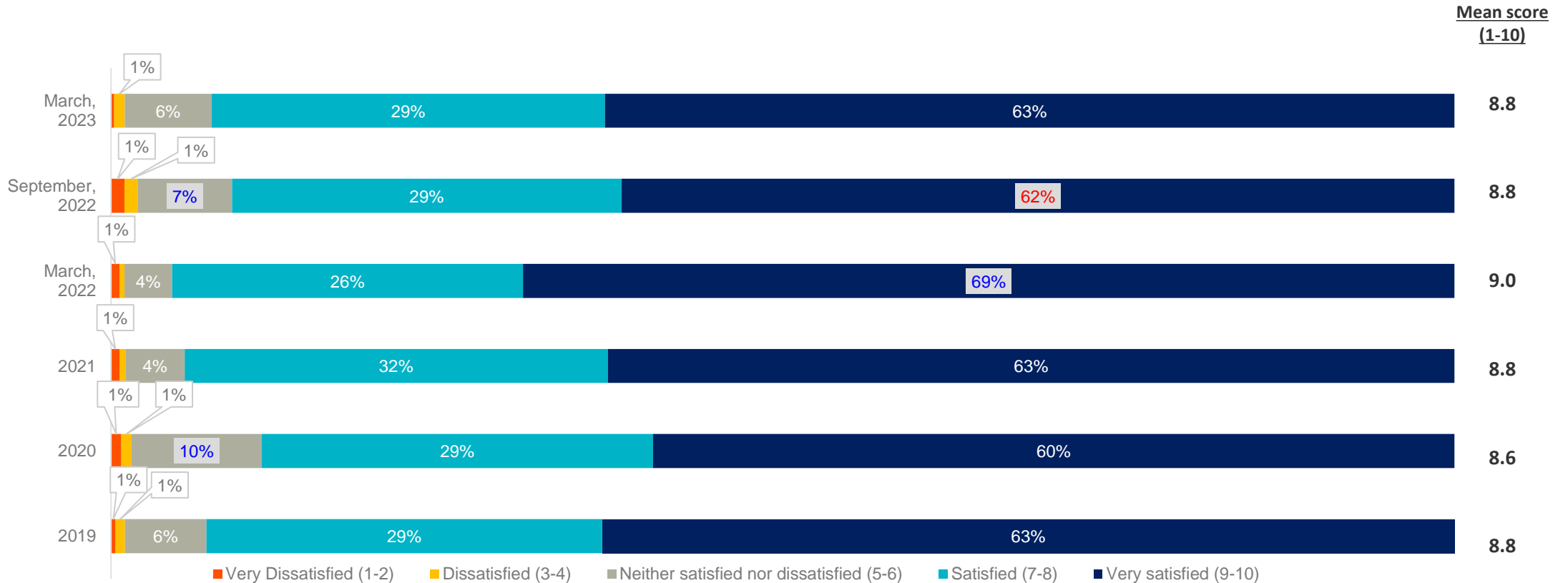
Satisfaction with the safety and security when travelling on Light Rail remains high and consistent across all demographic groups, with those aged 65+ having a significantly higher average (9.1).

	TOTAL	GENDER		AGE				
		Male	Female	16-24	25-34	35-49	50-64	65+
Very satisfied (9-10)	62%	65%	60%	62%	60%	57%	66%	72%
Satisfied (7-8)	31%	29%	33%	29%	35%	38%	26%	25%
Neither satisfied nor dissatisfied (5-6)	5%	4%	6%	6%	5%	5%	5%	3%
Dissatisfied (3-4)	1%	1%	1%	2%	0%	1%	1%	0%
Very dissatisfied (1-2)	0%	0%	0%	1%	0%	0%	1%	0%
Mean score (1-10)	8.8	8.8	8.7	8.7	8.7	8.7	8.8	9.1
Base n=	1,270	534	736	397	346	228	148	151

CQ2. How dissatisfied or satisfied are you with 'safety and security when travelling on Light Rail'?
 Base: All respondents March 2023 n=1,270
 Significantly higher than other groups (i.e. cell vs. not-cell)
 Significantly lower than other groups

Satisfaction with the customer service of the Light Rail staff

Overall satisfaction remains high with 93% of Light Rail users reporting they are satisfied with the customer service of the Light Rail staff. Findings remain consistent with September 2022.



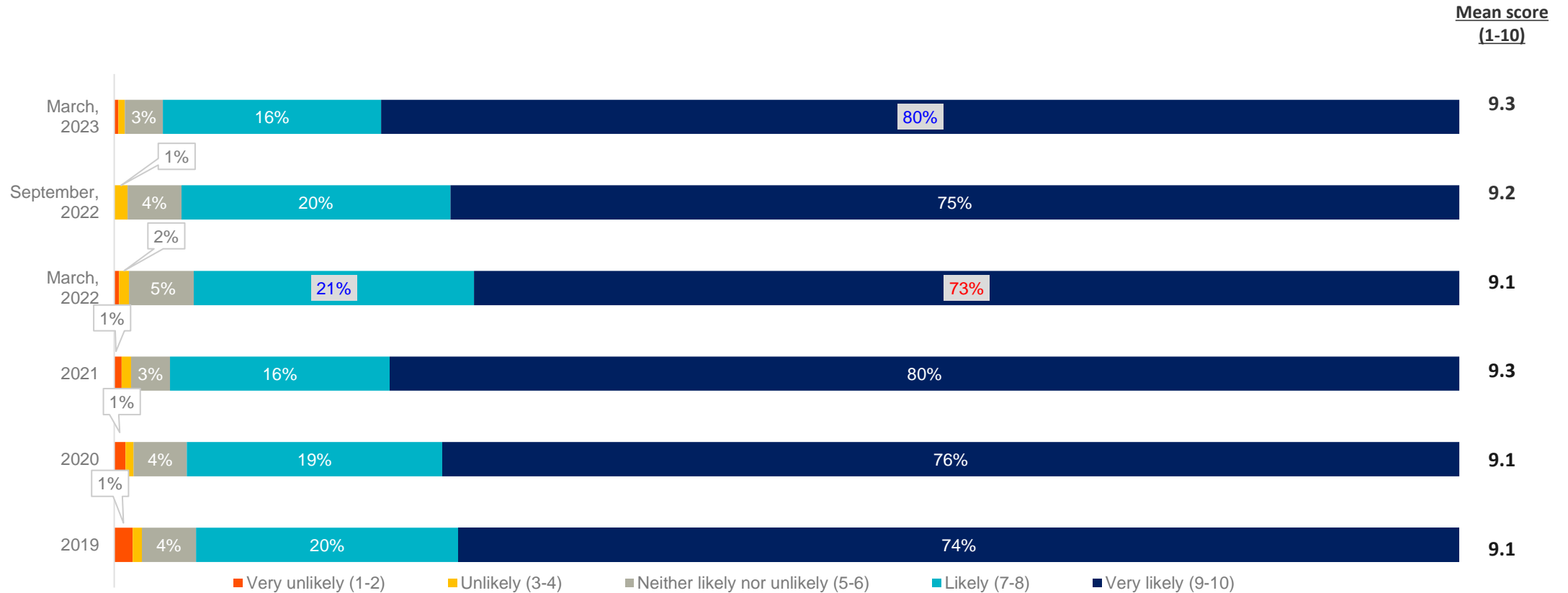
Satisfaction with the customer service of the Light Rail staff

Satisfaction with customer service of the Light Rail staff is remains relatively high across all demographics, with those aged 65+ having a significantly higher average (9.1).

	TOTAL	GENDER		AGE				
		Male	Female	16-24	25-34	35-49	50-64	65+
Very satisfied (9-10)	63%	61%	65%	63%	59%	63%	67%	70%
Satisfied (7-8)	29%	31%	28%	29%	32%	31%	25%	25%
Neither satisfied nor dissatisfied (5-6)	6%	7%	6%	6%	8%	6%	7%	5%
Dissatisfied (3-4)	1%	1%	1%	1%	1%	0%	1%	0%
Very dissatisfied (1-2)	0%	0%	0%	0%	0%	0%	1%	0%
Mean score (1-10)	8.8	8.7	8.8	8.7	8.6	8.8	8.8	9.1
Base n=	1,270	534	736	397	346	228	148	151

Likelihood of recommending Light Rail to friends and family

March 2023 has seen a significant increase in Light Rail users reporting they are very likely to recommend Light Rail to friends and family (80%). Overall likelihood to recommend has also seen a directional increase from September 2022 (96% and 95%, respectively).



Likelihood of recommending Light Rail to friends and family

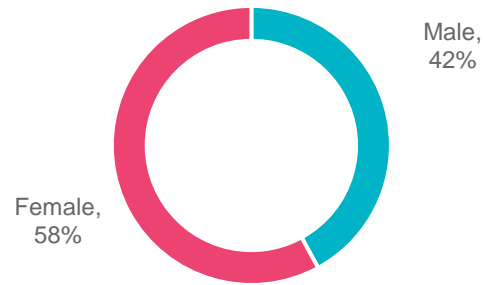
Respondents report consistently high likelihood of recommending Light Rail to friends and family across all demographics groups. However, those aged 16-24 (9.1) and males (9.2) have significantly lower average scores than other demographic groups and females (9.4) have a significantly higher average score.

	TOTAL	GENDER		AGE				
		Male	Female	16-24	25-34	35-49	50-64	65+
Very likely (9-10)	80%	77%	82%	73%	83%	84%	82%	84%
Likely (7-8)	16%	18%	15%	22%	14%	12%	15%	14%
Neither likely nor unlikely (5-6)	3%	4%	2%	3%	2%	4%	3%	1%
Unlikely (3-4)	0%	1%	0%	1%	0%	0%	0%	0%
Very unlikely (1-2)	0%	1%	0%	1%	0%	0%	0%	1%
Mean score (1-10)	9.3	9.2	9.4	9.1	9.3	9.4	9.4	9.5
Base n=	1,270	534	736	397	346	228	148	151

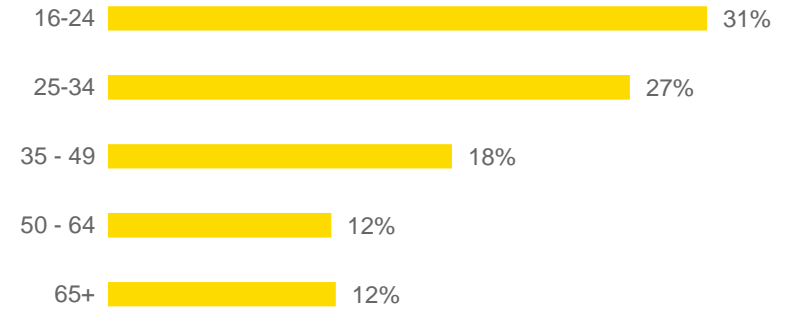
Appendix: Demographics and questionnaire

Respondent profile

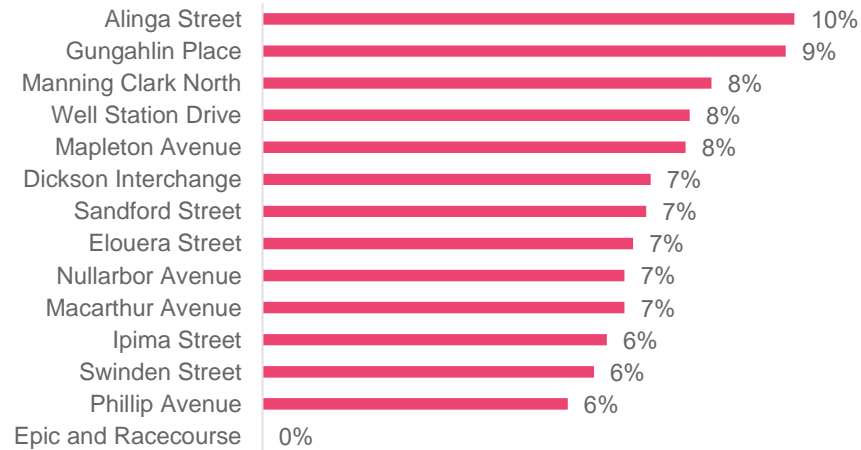
Gender



Age groups



Most recent stop



Date of interview (March 2023)

