

KANTAR PUBLIC

Canberra Light Rail Customer Satisfaction Survey September 2023

Prepared for Canberra Metro
Operations

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Executive Summary

Executive Summary

- The majority (91%) of light rail users report that walking is part of their Light Rail Journey. This is followed by almost one in three (32%) using a bus service in their journey.
- Over half (51%) of Light Rail users report they will use at least one of the new Stage 2A Light Rail stops. With two in five (40%) reporting the new stop they will use is the Commonwealth Park stop.
- Around three in four (77%) Light Rail users report that their Light Rail usage is influenced (somewhat or greatly) by the environmental benefits of a zero emissions public transport system.
- Over nine in ten (92%) Light Rail users report they are satisfied (7-10) with the frequency of the Light Rail service. 62% report they are very satisfied.
- Majority (60%) of Light Rail users typically use the Light Rail on weekdays during peak times. This is followed by 53% typically using the Light Rail on weekdays outside of peak times.
- Most Light Rail users report that it is easy to top up their MyWay card or purchase a ticket at the Light Rail stop (86%). Just under one in three (29%) report they are aware of the 5% discount applied when using autoload or BPAY to top up their MyWay card. Awareness is highest among those aged 35-49 (42%).
- Almost half (47%) of Light Rail users report they speak a language other than English at home. Other than English, the languages most commonly spoken at home are Nepali (8%), Hindi (7%) and Mandarin (6%).
- Just over one in ten (13%) Light Rail users report they have taken their bike on the Light Rail before, with 9% reporting they take their bike on board at least once a month. Of the users who have taken their bike onboard the Light Rail before, just under four in five (79%) report there is normally (often + always) bike racks available on board.
- 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 (96% satisfied or very satisfied - scores 7-10)
 - Cleanliness average score 8.8 (95% satisfied or very satisfied - scores 7-10)
 - Safety and security average score 8.8 (92% satisfied or very satisfied - scores 7-10)
 - Customer service average score 8.7 (92% satisfied or very satisfied - scores 7-10)
- Likelihood to recommend Light Rail to friends or family was also high, with 77% being very likely (scores 9-10) to recommend and 18% being likely (scores 7-8) to recommend (95% overall likely to recommend – scores 7-10) with an average score of 9.2 (Performance Target average score of no less than 8 is required for this metric).

Methodology

Methodology

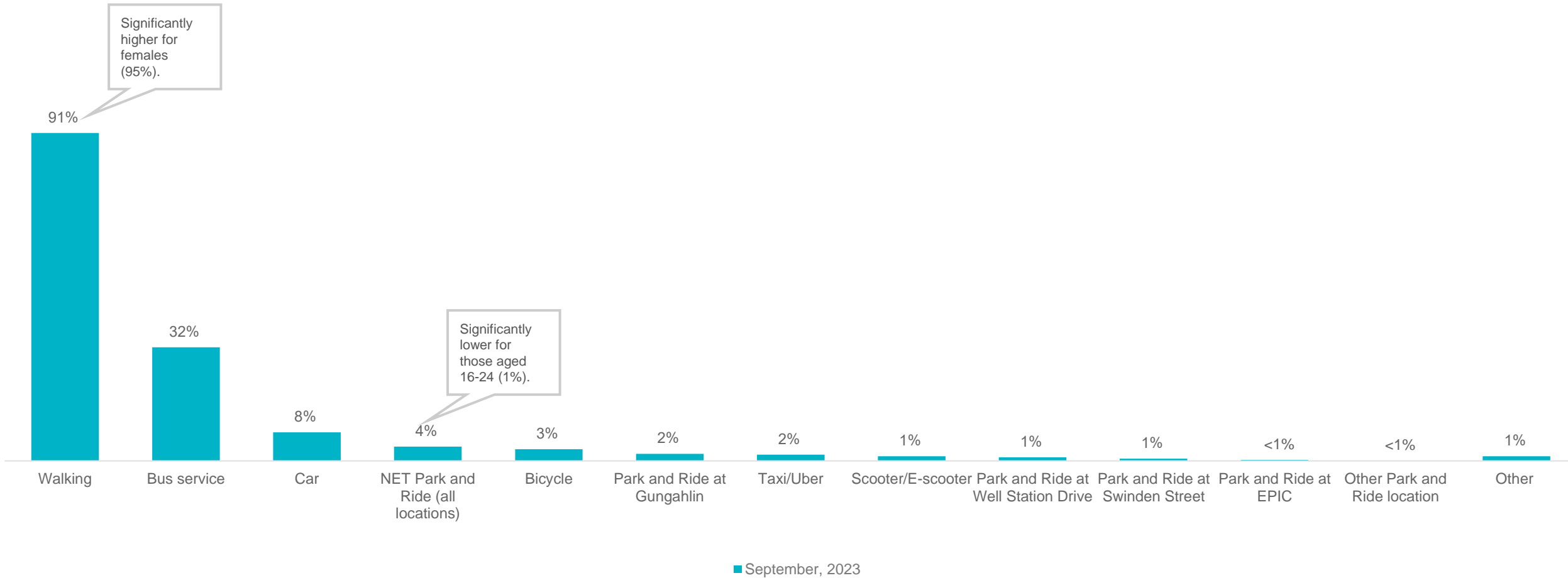
- Kantar Public partnered with Q&A Research to deliver the CMET Customer Satisfaction Survey:
 - Kantar Public are CMET's day-to-day contact, leading on all aspects of research design, analysis and reporting. Q&A Research are responsible for co-ordinating all aspects of fieldwork
- Quantitative questionnaire was completed using iPads on board Light Rail via intercepts
- n=1,073 total responses
- LOI was 3.3 minutes
- Fieldwork was conducted from 1 September 2023 – 14 September 2023, between all hours of operation and across different stops
- Margin of error was +/-2.91%
- 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%

Usage and knowledge of Light Rail services

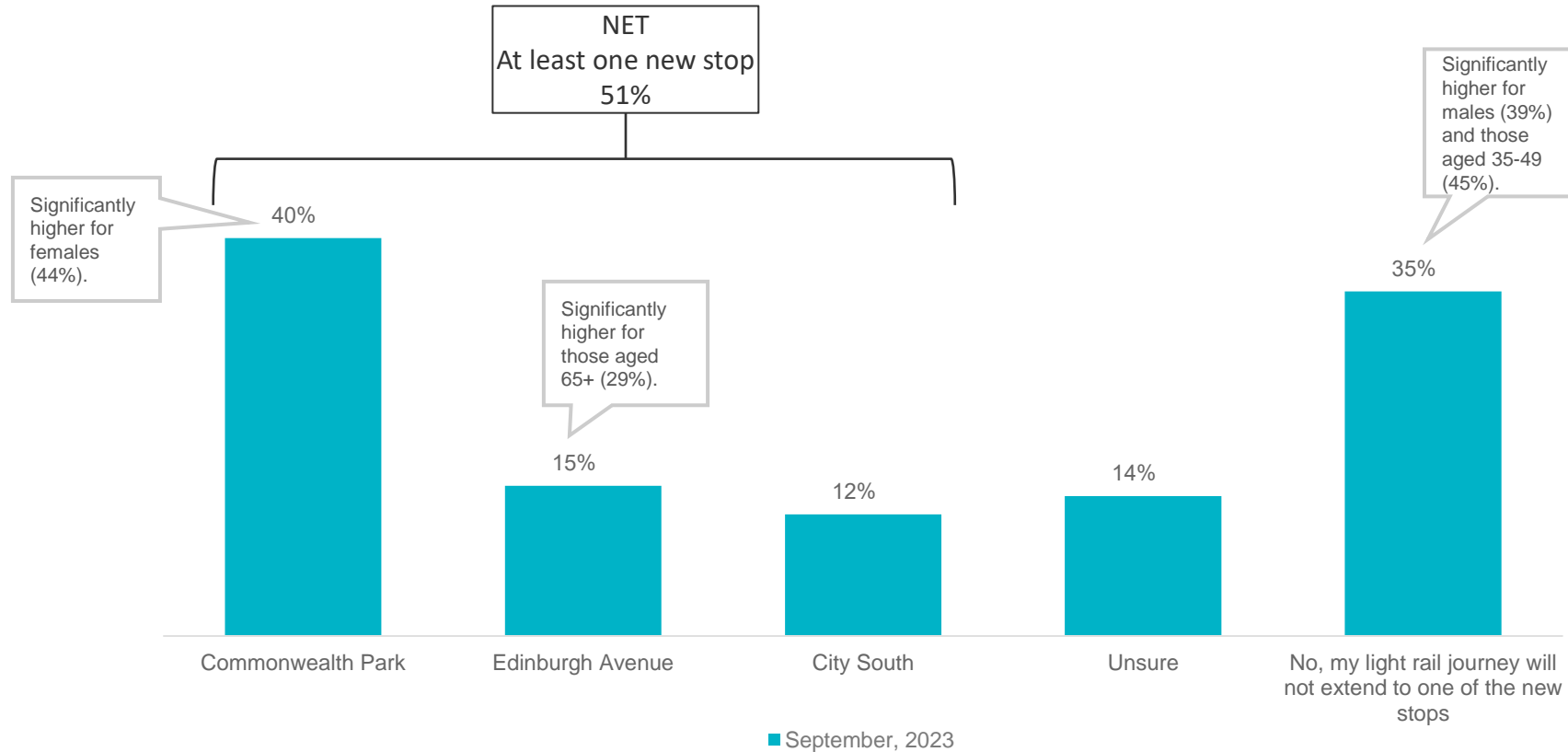
Other modes used in Light Rail journey

Vast majority of light rail users report that walking is part of their Light Rail Journey (91%). This is followed by almost one in three (32%) also using a bus service in their journey.



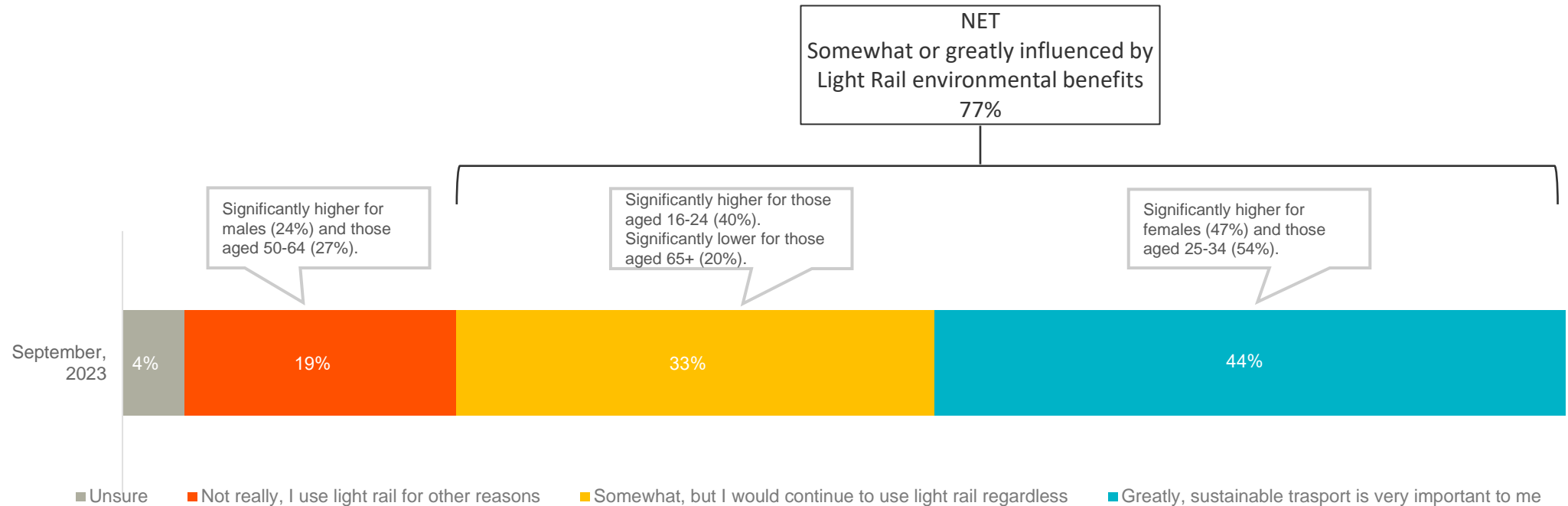
Usage of new Stage 2A Light Rail extension stops

When Light Rail users are prompted with the new Stage 2A Light Rail stops, over half (51%) report they will be using at least one of the new stops. Two in five Light Rail users (40%) report the new stop they will be using is the Commonwealth Park stop. The upcoming Floriade event, held at Commonwealth Park, may have influenced the number of users reporting they plan to use the new Commonwealth Park stop.



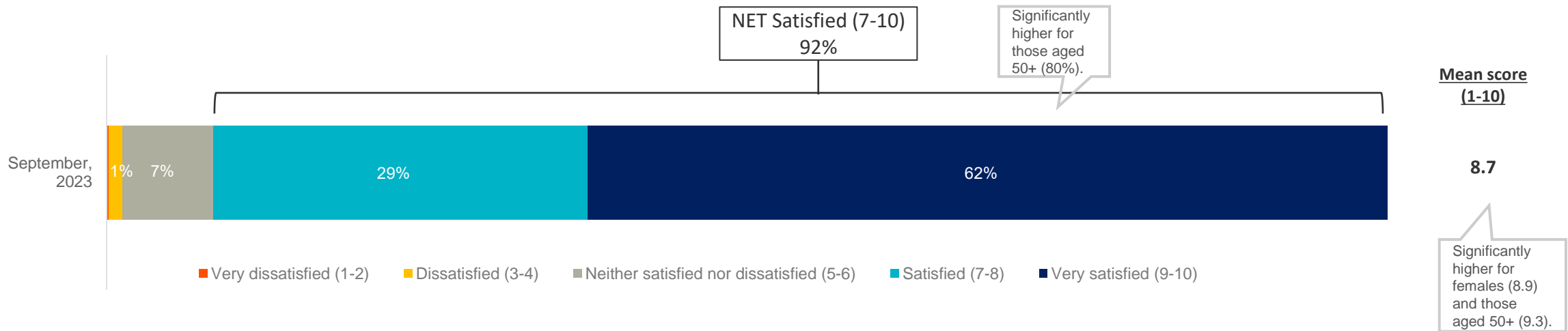
Environmental benefits influence on Light Rail usage

Just over three in four (77%) Light Rail users report their Light Rail usage is somewhat or greatly influenced by the environmental benefits of a zero emissions public transport system. With just over two in five (44%) reporting they are greatly influenced by this. Females (47%) and those aged 25-24 (54%) are significantly more likely to be greatly influenced by these environmental benefits.



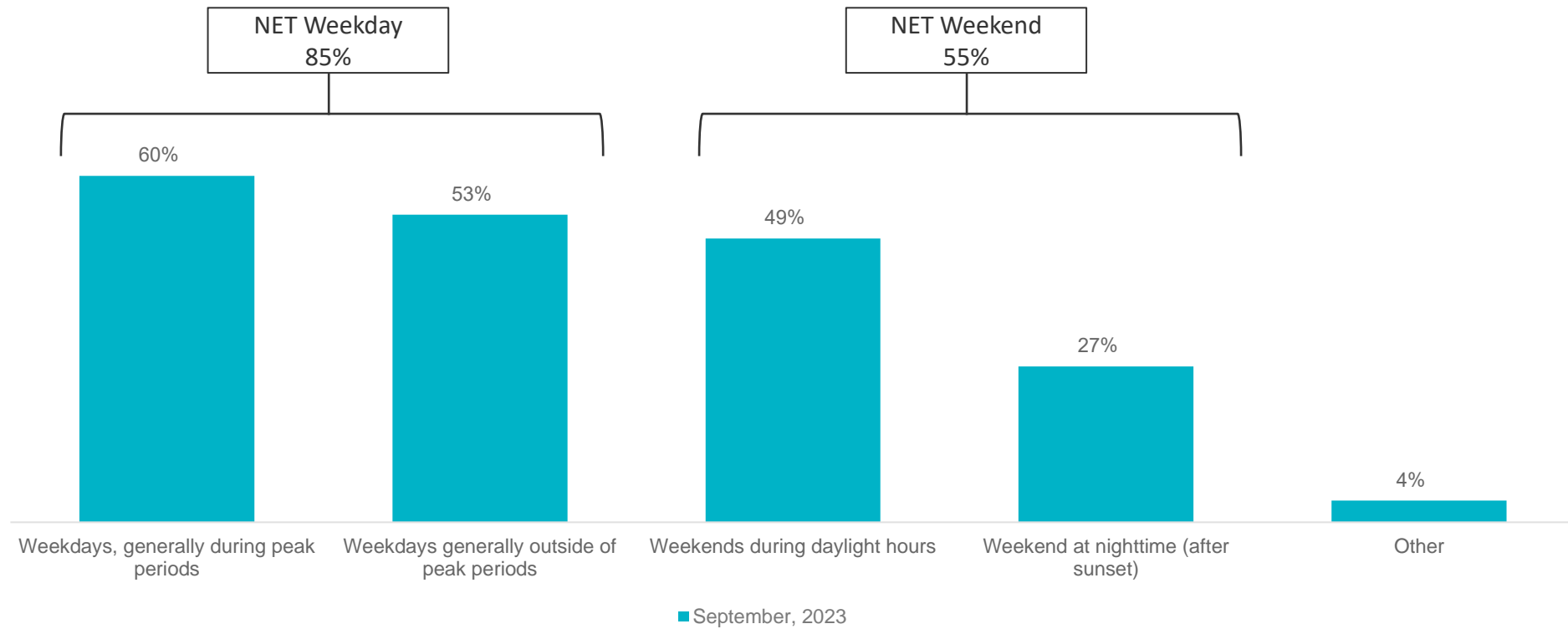
Overall satisfaction with frequency of the Light Rail service

When Light Rail users are asked to rate their overall satisfaction with the frequency of the Light Rail service, the vast majority (92%) report being satisfied (7-10), with almost two in three (62%) reporting they are very satisfied. Those aged 50+ are significantly more likely to report they are very satisfied (80%).



Typical time of day Light Rail is used

Just over five in six (85%) Light Rail users report they typically use the Light Rail during the week, with three in five (60%) users reporting they use it typically during peak periods. Over half (55%) of Light Rail users report they use it on the weekend.



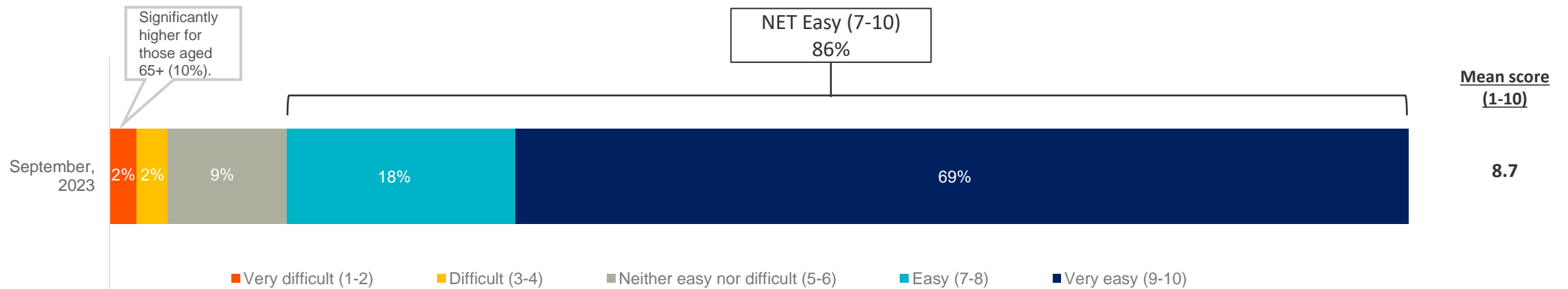
Typical time of day Light Rail is used

A few significant differences among demographics emerge from the typical time of day the Light Rail is used. Females (64%) and those aged 25-34 (67%) are significantly more likely to report they use the Light Rail on weekdays, during peak periods. Those aged 65+ are significantly more likely to report they use the Light Rail on weekdays, outside of peak periods (87%).

	TOTAL	GENDER		AGE				
		Male	Female	16-24	25-34	35-49	50-64	65+
Weekdays, generally during peak periods	60%	56%	64%	60%	67%	64%	54%	28%
Weekdays, generally outside of peak periods	53%	52%	54%	55%	47%	46%	54%	87%
Weekends, during daylight hours	49%	48%	50%	48%	48%	49%	54%	49%
Weekends, at nighttime (after sunset)	27%	30%	24%	31%	29%	21%	25%	20%
Other	4%	4%	4%	3%	3%	4%	6%	6%
Base n=	1,073	524	549	316	349	201	118	89

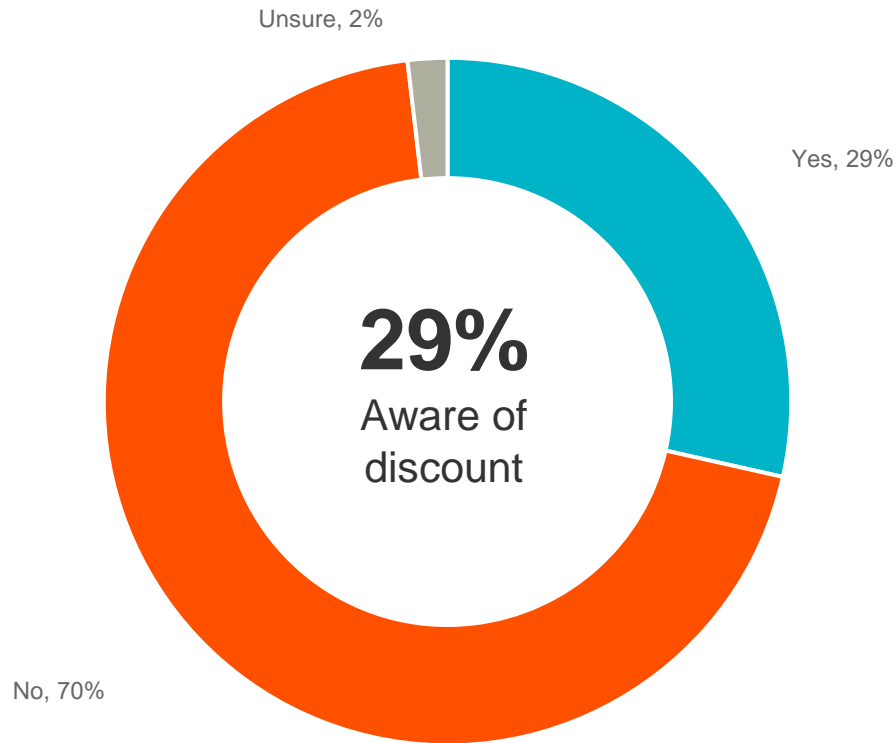
Ease of topping up MyWay card or purchasing a ticket

When Light Rail users are asked how easy it is to top up their MyWay card or purchase a ticket at the Light Rail stop, the majority (86%) report it as easy, with just over two in three (69%) reporting very easy. Findings are consistent across demographic groups, however, those aged 65+ (10%) are significantly more likely to report it is very difficult.



Awareness of 5% MyWay discount from using autoloader or BPAY

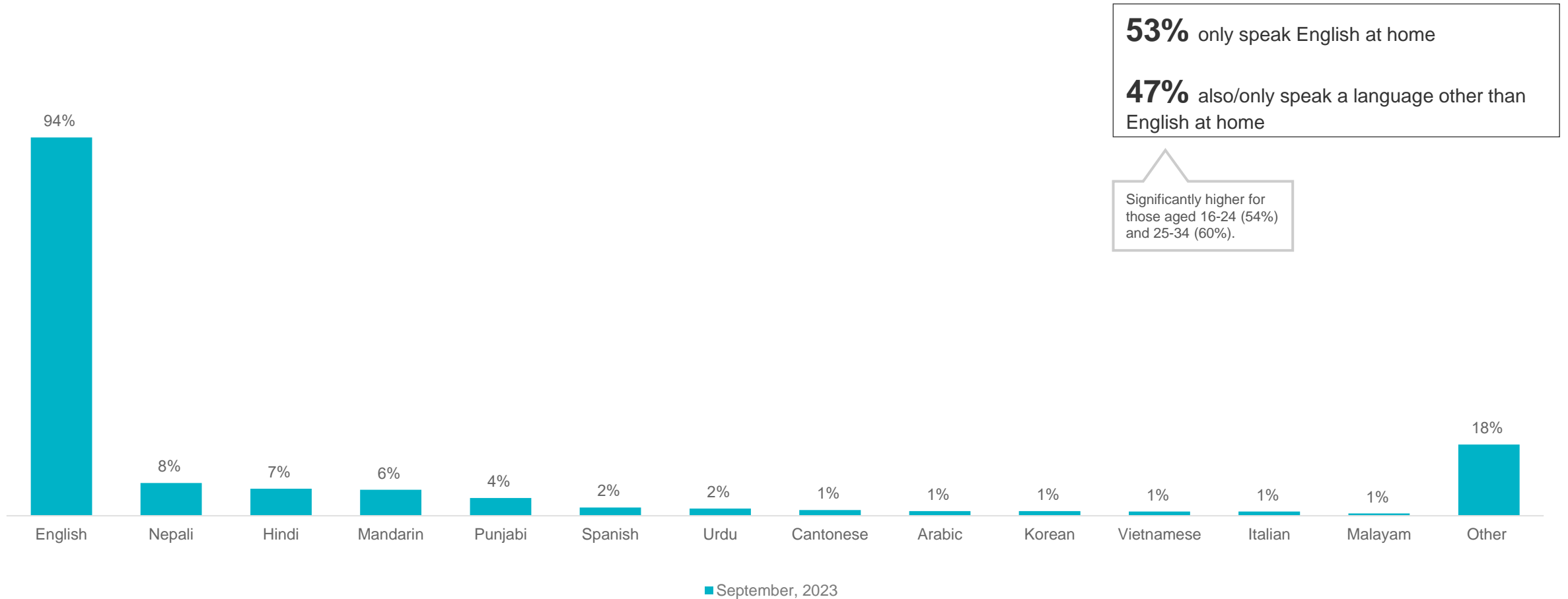
Around one in three (29%) Light Rail users are aware of the 5% discount on fares on offer when using autoloader or BPAY when topping up their MyWay. Awareness is significantly higher for those aged 35-49 years (42%) and significantly lower for those aged 16-24 (20%) and age 65+ (12%).



	TOTAL	GENDER		AGE				
		Male	Female	16-24	25-34	35-49	50-64	65+
Yes, aware	29%	27%	30%	20%	32%	42%	32%	12%
No, not aware	70%	71%	68%	78%	66%	58%	66%	82%
Unsure	2%	2%	2%	2%	2%	0%	2%	6%
Base n=	1,073	524	549	316	349	201	118	89

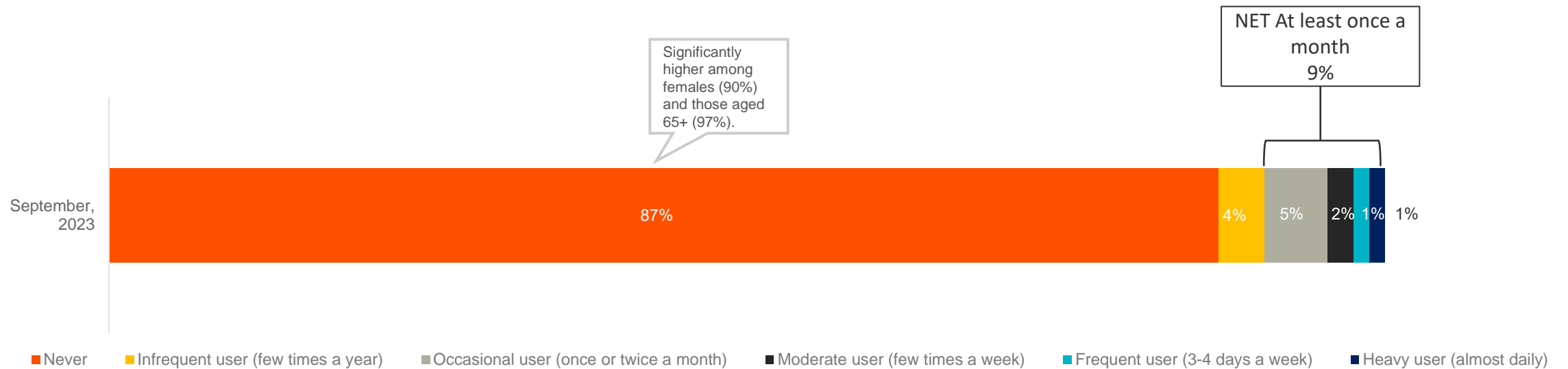
Languages spoken at home

Vast majority of Light Rail users (94%) report they speak at least English at home, with just over half of Light Rail users (53%) reporting they only speak English at home. Of the 47% who speak another language at home, the most spoken languages are Nepali (8%), Hindi (7%) and Mandarin (6%).



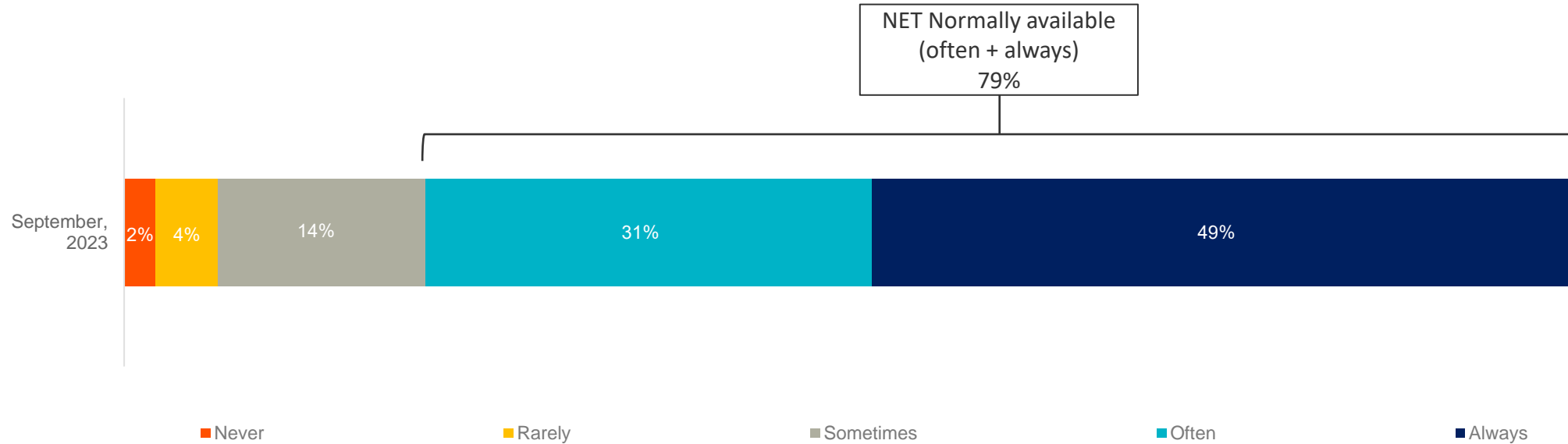
Frequency of taking bikes onto the Light Rail

Majority of Light Rail users report they have never taken their bike onto the Light Rail (87%). Just under one in ten (9%) report they take their bike onto the Light Rail at least once a month.



Availability of onboard bike racks

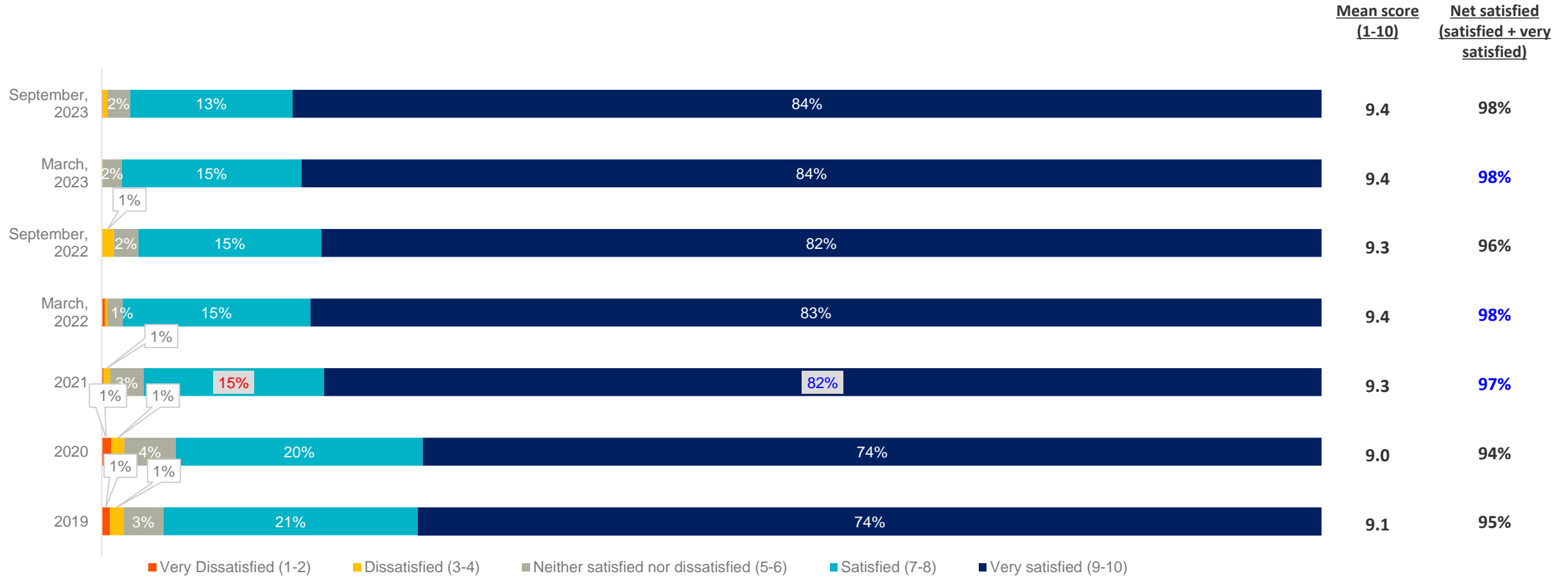
Of the Light Rail users who report they have taken their bike onto the Light Rail before, just under four in five (79%) report there is often or always onboard bike racks available.



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 remains consistent with March 2023, with 84% of Light Rail users reporting they are very satisfied.



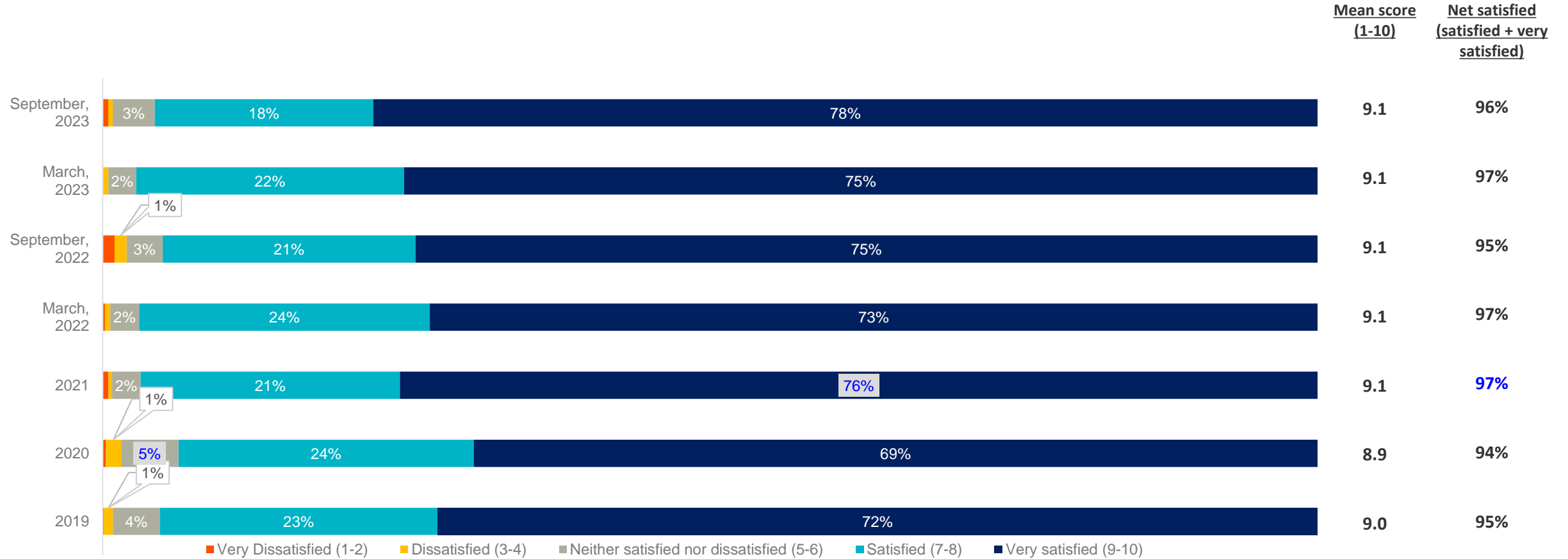
Satisfaction with ease of using Light Rail

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%	82%	87%	82%	83%	87%	88%	88%
Satisfied (7-8)	13%	15%	11%	15%	15%	11%	8%	10%
Neither satisfied nor dissatisfied (5-6)	2%	3%	1%	3%	2%	1%	3%	0%
Dissatisfied (3-4)	0%	0%	1%	0%	0%	0%	1%	1%
Very dissatisfied (1-2)	0%	0%	0%	0%	0%	0%	0%	1%
Mean score (1-10)	9.4	9.3	9.5	9.3	9.4	9.4	9.5	9.5
Base n=	1,073	524	549	316	349	201	118	89

Satisfaction with the reliability of Light Rail

Light Rail users' overall satisfaction with the reliability of Light Rail has seen a directional increase from March 2023, with 78% of users reporting they are very satisfied.



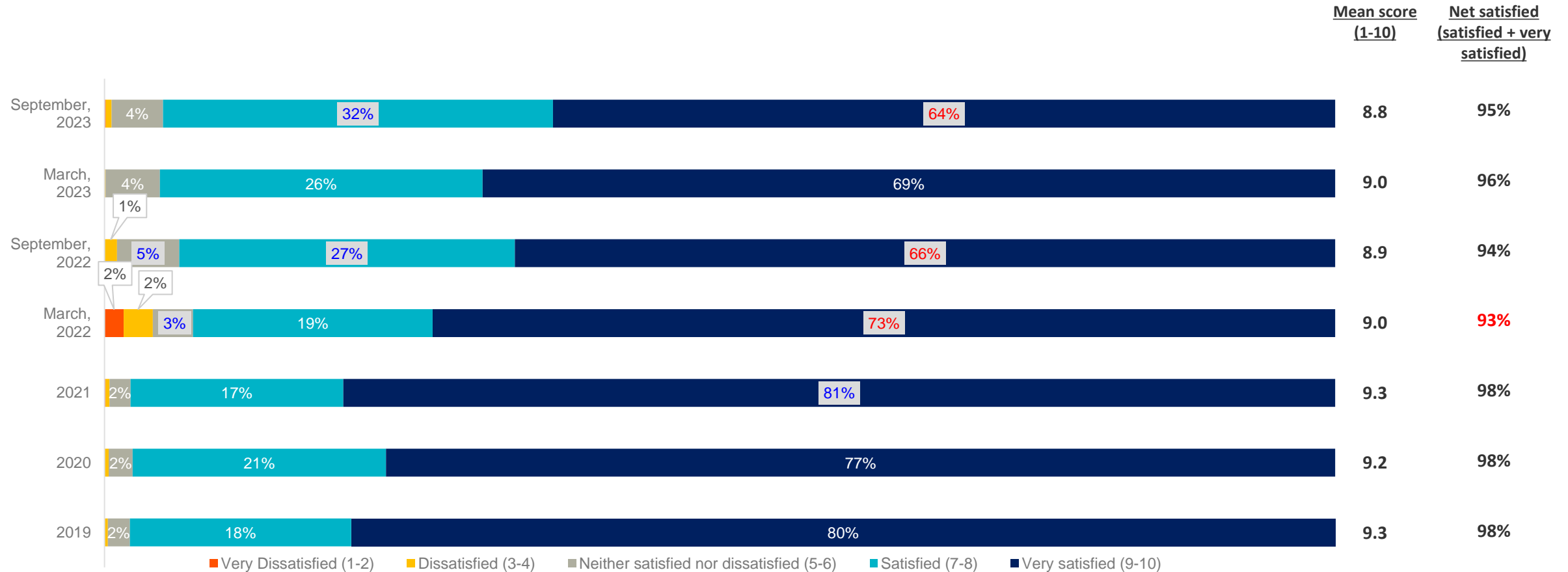
Satisfaction with the reliability of Light Rail

Satisfaction with the reliability of Light Rail in terms of it departing and arriving on time is relatively consistent across all demographic groups, similar to previous waves of research. However, male Light Rail users (9.0) and those aged 16-24 (8.9) have a significantly lower average. Females (9.2) and those aged 50-64 (9.4) have a significantly higher average.

	TOTAL	GENDER		AGE				
		Male	Female	16-24	25-34	35-49	50-64	65+
Very satisfied (9-10)	78%	74%	81%	70%	77%	83%	87%	88%
Satisfied (7-8)	18%	21%	15%	25%	19%	16%	8%	8%
Neither satisfied nor dissatisfied (5-6)	3%	4%	3%	4%	4%	0%	4%	3%
Dissatisfied (3-4)	0%	1%	0%	0%	1%	0%	0%	0%
Very dissatisfied (1-2)	0%	0%	1%	1%	0%	1%	0%	1%
Mean score (1-10)	9.1	9.0	9.2	8.9	9.1	9.3	9.4	9.4
Base n=	1,073	524	549	316	349	201	118	89

Satisfaction with cleanliness on board Light Rail and at the stops

September 2023 has seen a significant decrease in Light Rail users reporting they are very satisfied with the cleanliness on board Light Rail and at the stops (64%). Despite this significant decrease, there has been a significant increase in users reporting they are satisfied (32%) from March 2023.



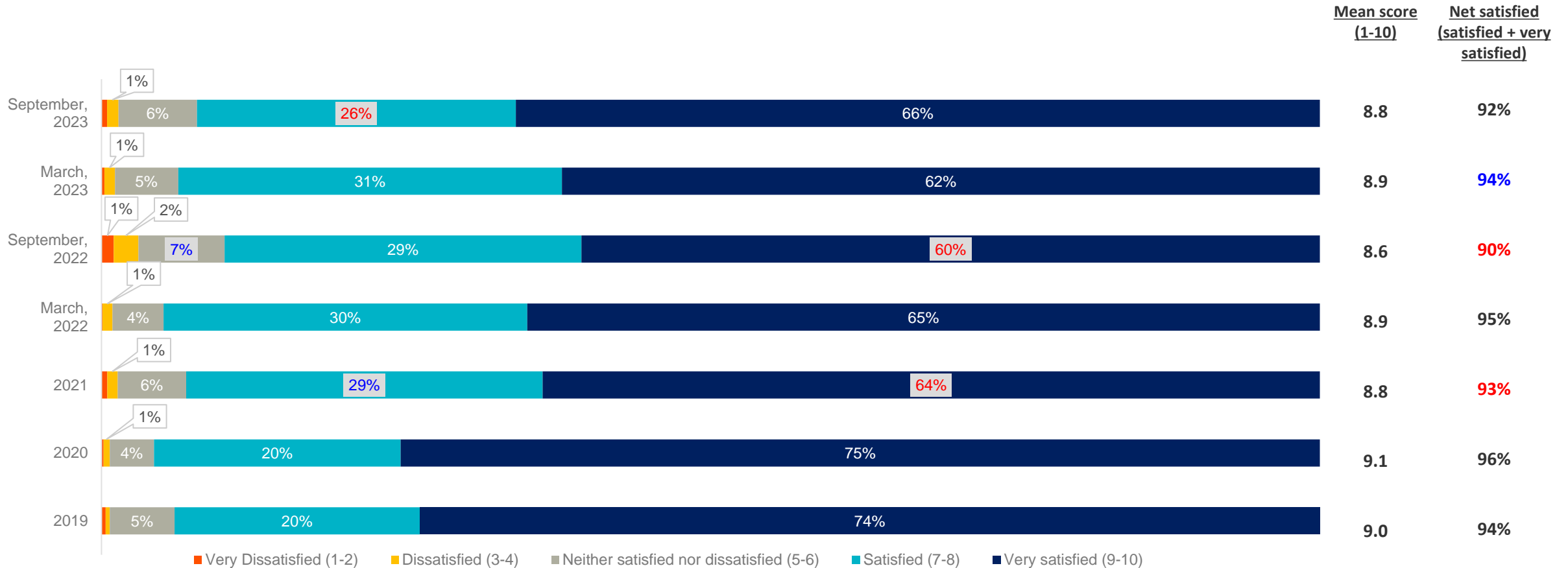
Satisfaction with cleanliness on board Light Rail and at the stops

Satisfaction with cleanliness on board Light Rail and at the stops is high across all demographic groups. Those aged 65+ (83%) are significantly more likely to be very satisfied with the cleanliness on board Light Rail and at the stops.

	TOTAL	GENDER		AGE				
		Male	Female	16-24	25-34	35-49	50-64	65+
Very satisfied (9-10)	64%	63%	64%	59%	60%	63%	73%	83%
Satisfied (7-8)	32%	32%	31%	35%	34%	33%	26%	15%
Neither satisfied nor dissatisfied (5-6)	4%	4%	4%	5%	6%	4%	0%	1%
Dissatisfied (3-4)	0%	1%	0%	1%	0%	0%	1%	0%
Very dissatisfied (1-2)	0%	0%	0%	0%	0%	0%	0%	1%
Mean score (1-10)	8.8	8.8	8.8	8.6	8.7	8.8	9.1	9.4
Base n=	1,073	524	549	316	349	201	118	89

Satisfaction with the safety and security when travelling on Light Rail

Majority of Light Rail users are very satisfied with the safety and security when travelling on Light Rail (66%), this has seen a direction increase from March 2023.



Satisfaction with the safety and security when travelling on Light Rail

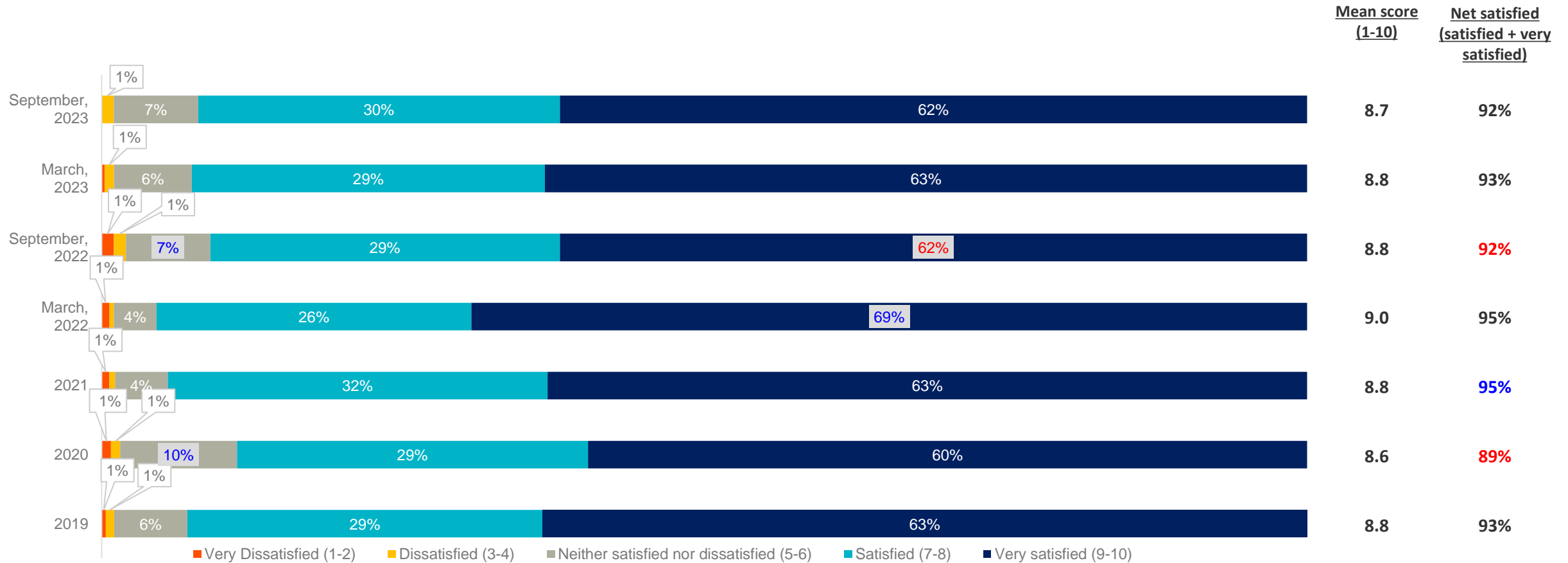
Satisfaction with the safety and security when travelling on Light Rail remains high and consistent across all demographic groups, with those aged 65+ having a significantly higher average (9.3).

	TOTAL	GENDER		AGE				
		Male	Female	16-24	25-34	35-49	50-64	65+
Very satisfied (9-10)	66%	66%	66%	62%	64%	67%	69%	79%
Satisfied (7-8)	26%	27%	25%	26%	29%	26%	25%	18%
Neither satisfied nor dissatisfied (5-6)	6%	6%	7%	11%	5%	5%	5%	2%
Dissatisfied (3-4)	1%	1%	1%	1%	1%	0%	1%	0%
Very dissatisfied (1-2)	0%	0%	1%	0%	0%	1%	0%	1%
Mean score (1-10)	8.8	8.9	8.8	8.7	8.8	8.8	8.9	9.3
Base n=	1,073	524	549	316	349	201	118	89

Q6. How dissatisfied or satisfied are you with 'safety and security when travelling on Light Rail'?
 Base: All respondents September 2023 n=1,073
 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 92% of Light Rail users reporting they are satisfied with the customer service of the Light Rail staff. Findings remain consistent with March 2023.



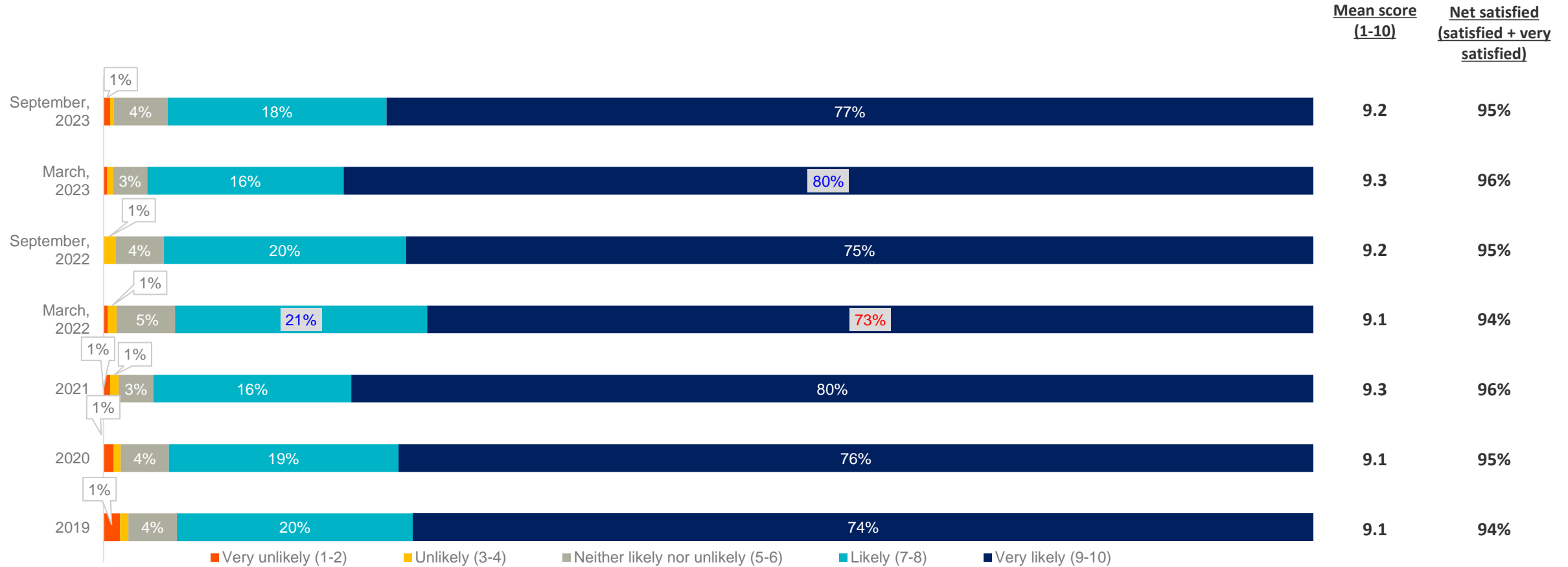
Satisfaction with the customer service of the Light Rail staff

Satisfaction with customer service of the Light Rail staff is remains relatively high across all demographics, with females (8.8) and those aged 25-34 (8.9) having a significantly higher average.

	TOTAL	GENDER		AGE				
		Male	Female	16-24	25-34	35-49	50-64	65+
Very satisfied (9-10)	62%	59%	66%	53%	66%	62%	67%	76%
Satisfied (7-8)	30%	32%	27%	35%	29%	32%	23%	15%
Neither satisfied nor dissatisfied (5-6)	7%	8%	6%	9%	5%	5%	9%	8%
Dissatisfied (3-4)	1%	1%	1%	2%	0%	0%	1%	0%
Very dissatisfied (1-2)	0%	0%	0%	0%	1%	0%	0%	1%
Mean score (1-10)	8.7	8.6	8.8	8.4	8.9	8.7	8.8	9.1
Base n=	1,073	524	549	316	349	201	118	89

Likelihood of recommending Light Rail to friends and family

Despite a direction decrease in September 2023, the majority Light Rail users continue to report they would recommend the Light Rail to friends and family (77%).



Likelihood of recommending Light Rail to friends and family

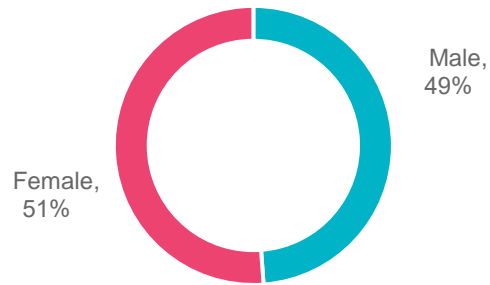
Respondents report consistently high likelihood of recommending Light Rail to friends and family across all demographics groups. Those aged 50-64 have a significantly higher average score (9.5) and those aged 16-24 have significantly lower average score (8.8).

	TOTAL	GENDER		AGE				
		Male	Female	16-24	25-34	35-49	50-64	65+
Very satisfied (9-10)	77%	73%	80%	67%	77%	81%	85%	88%
Satisfied (7-8)	18%	21%	16%	23%	19%	15%	14%	8%
Neither satisfied nor dissatisfied (5-6)	4%	6%	3%	9%	3%	2%	2%	1%
Dissatisfied (3-4)	0%	0%	0%	0%	0%	1%	0%	0%
Very dissatisfied (1-2)	1%	0%	1%	1%	0%	0%	0%	3%
Mean score (1-10)	9.2	9.1	9.2	8.8	9.2	9.3	9.5	9.4
Base n=	1,073	524	549	316	349	201	118	89

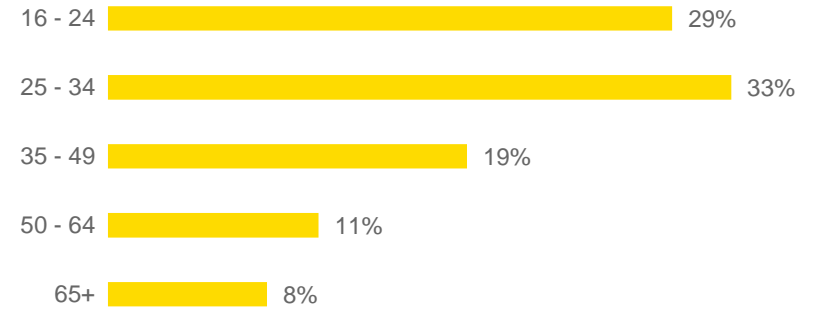
Appendix: Demographics and questionnaire

Respondent profile

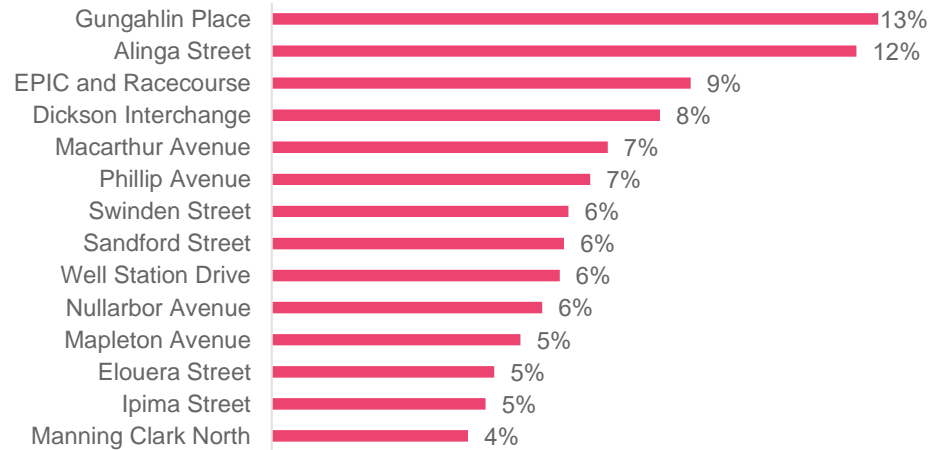
Gender



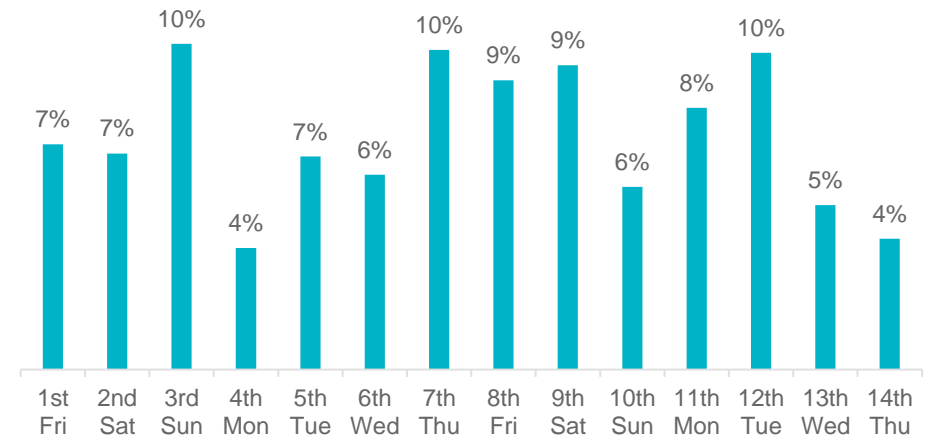
Age groups



Most recent stop



Date of interview (September 2023)



Questionnaire

Light Rail Customer Satisfaction Survey – Q3, 2023

The Light Rail Customer Satisfaction Survey is undertaken twice per year as a requirement of the PPP Project Agreement. The survey is conducted face to face by an independent surveying company. The survey is scheduled to commence on **Friday 1 September**, with an expected duration of two weeks.

TCCS Light Rail Operations needs to submit TCCS' questions to CMET (via Aconex) at least 2 months prior to the survey commencing, which is **1 July 2023** for this survey however an extension has been provided.

The survey consists of 4 parts:

- Part 1 – Screening Questions to allow for data analytics.
- Part 2 – Contractual Questions which are set in the PPP Project Agreement and depending on the results, Canberra Metro can be penalised (abated) if they do not exceed a minimum performance target.
- Part 3 – TCCS Additional Questions – TCCS can include up to 5 additional questions in each survey which can vary for each survey. Questions for this survey have been developed by TC Light Rail Operations, TC Customer Experience, and TCCS Communications with a focus on customer comfort with the LRV temperature, which repeats questions from the previous survey to account for seasonality trends, and overall light rail satisfaction to align with the Select Committee on Estimates 2022-23 inquiry into the ACT Budget recommendation to understand why people are dissatisfied through TC customer surveys.
- Part 4 – CMET Additional Questions – CMET can also include up to 5 additional questions in each survey, which are provided below.

The surveyors have a COVID Safe Plan and wear PPE in accordance with ACT Health Guidelines and a risk assessment conducted with CMET.

Part 1 - Screening Questions

1. 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
2. Record direction of travel and time of day
 - North (toward Gungahlin)
 - South (toward City)
3. Record perceived gender
 - Male
 - Female
4. 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

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 ...

5. ... 'customer service of the Light Rail staff'?
 - Scale of 1 to 10
6. ... 'safety and security when travelling on Light Rail'?
 - Scale of 1 to 10
7. ... 'reliability of Light Rail in terms of it departing and arriving on time'?
 - Scale of 1 to 10
8. ... 'ease of using Light Rail'?
 - Scale of 1 to 10
9. ... 'cleanliness on board the Light Rail vehicle and at the stops'?
 - Scale of 1 to 10

Using a scale from 1 to 10, where 1 is very unlikely and 10 is very likely, how likely or unlikely are you to ...

10. ... 'recommend Light Rail to your family and friends'?
 - Scale of 1 to 10

Part 3 - TCCS Additional Questions

11. What else was used as part of your journey today?

[ALLOW MR]

- Walking
- Bicycle
- Scooter/E-scooter
- Bus service
- Taxi/Uber
- Car
- Park and Ride at Gungahlin
- Park and Ride at Well Station Drive
- Park and Ride at EPIC
- Park and Ride at Swinden Street
- Other Park and Ride location
- Other [please specify]

12. With light rail being extended to Commonwealth Park as part of Stage 2A, will your journey on light rail extend to one of the new stops when they open? If so, which stop?

[SHOW MAP IMAGE WITH QUESTION IF REQUIRED]

- Edinburgh Avenue
- City South
- Commonwealth Park
- No, my light rail journey will not extend to one of the new stops
- Unsure



13. Canberra light rail utilises 100% renewable energy. How much do the environmental benefits of a zero emissions public transport system influence your decision to use light rail?

- Greatly, sustainable transport is very important to me
- Somewhat, but I would continue to use light rail regardless
- Not really, I use light rail for other reasons
- Unsure

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 ...

14. ...the frequency of light rail services when you travel on light rail?
 - Scale of 1 to 10
15. (Follow up) What time of day do you typically travel on light rail?
 - [ALLOW MR]
 - Weekdays, generally during peak periods
 - Weekdays generally outside of peak periods
 - Weekends during daylight hours
 - Weekends at nighttime (after sunset)
 - Other (please specify)

Part 4 - CMET Additional Questions

16. Using a scale from 1 to 10, where 1 is very difficult and 10 is very easy, how difficult or easy do you find topping up your MyWay card or purchasing a ticket at the light rail stop?

- Scale of 1 to 10
- Not applicable

17. Did you know you can receive a 5% discount on fares by selecting autoloan (direct debit) or BPAY to top up your MyWay?

- Yes
- No
- Unsure

18. What language are spoken at home?

[ALLOW MR]

- English
- Mandarin
- Nepali
- Vietnamese
- Punjabi
- Hindi
- Cantonese
- Spanish
- Arabic
- Urdu
- Italian
- Korean
- Malayam
- Other (specify)

19. How often would you bring your bike onto the light rail?

- Heavy user (Almost daily; 5+ days per week)
- Frequent user (Every other day; 3-4 days per week)
- Moderate user (A few times per week; 1-2 days per week)
- Occasional user (once or twice a month, or thereabouts)
- Infrequent user (Used before, but only a few times per year)
- Never

ASK IF Q19=1-5

20. How often is the onboard bike rack available to use when you travel?

- Always
- Often
- Sometimes
- Rarely
- Never
- Unsure