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BACKGROUND AND METHODOLOGY

The ACT Government Capital Metro Agency has been conducting research within the ACT community to inform its communication and engagement strategies regarding the light rail plan for the ACT. This research had previously been conducted in a two-stage process including focus groups of various demographic groups across Canberra and a quantitative telephone survey of residents.

This report outlines the findings of a follow-up tracking survey conducted in December 2014 to assess any changes in public opinion since June 2014. This survey also allowed the opportunity to examine new issues and topics to ensure the research remains current. Piazza Research (a local ISO 20252 quality certified market and social research firm) conducted the first part of the work in June 2014, and was again selected to complete this tracking survey.

Methodology

A telephone survey of Canberra residents was conducted as this method provides results which are most representative of the ACT population overall.

Questionnaire design

The survey questions were developed using information and insights obtained from earlier work, including the focus group research and previous telephone survey, together with input from the Capital Metro Agency management team and input from Piazza Research project consultants. The survey was designed to be succinct to minimise respondent burden and could be administered by telephone in approximately 8 minutes. Most questions were ‘closed’ (or tick-box) format. Lists of issues presented (when asking for importance ratings from the community) were asked in randomised order to prevent any question order bias in results.

Data collection

Data collection was conducted between the 28th November and 12th December 2014 by trained research interviewers. A Computer Assisted Telephone Interviewing (CATI) system was used and quality control checks were conducted by data collection team supervisors.

Sample Design

List assisted random digit dialling was used to achieve a random sample of adult residents across the ACT.

A total of 1,230 responses were achieved. For the 95% confidence interval, overall results to this survey are calculated to be accurate to within a +/- 2.8% margin of error.

Quality Assurance System – This project complies with the ISO 20252 Market, Opinion and Social Research Standard.
Data Processing and Analysis

Piazza Research used its own statistical software, ‘Q’, and Excel to analyse survey results. Software validation and post data-entry checks were conducted to ensure data integrity before analysis.

A descriptive analysis was performed producing graphs, tables and frequency counts.

**Rounding error** – Percentage results have been rounded to the nearest whole per cent. Percentages in some graphs may total slightly more or less than 100%.

**Multiple choice questions** – Percentages may add to more than 100% for questions where respondents could select more than one option from a list (e.g. Q3 and Q4).
SUMMARY OF MAIN FINDINGS

- **Public awareness and communication** – Most residents (87%) had heard about the light rail project, however, only 21% who knew about the project could recall its brand name (Capital Metro). This result was the same as for June 2014 (within 1%). People mainly obtained their information through television or radio news or advertisements (67%) and from the Canberra Times or newspapers (on or off-line) (50%). About half (51%) of residents who had heard about the project knew that the business case had been released but only 18% of these had read it. While the majority (54%) of residents were aware there is a Light Rail Master Plan looking at a city-wide network, a high proportion (46%) were unaware.

- **Perception of traffic congestion** – The majority of Canberrans (51%) did not think traffic congestion was currently a problem in Canberra but over three quarters (79%) believed traffic congestion will be a problem for the future. The majority of current project non-supporters (66%) also believed that congestion would be a problem for Canberra in the future.

- **Messages and strong arguments for a light rail system** – The most influential message for a light rail system (from those presented) were “We are growing towards a population of 600,000 by 2050. To manage that growth sustainably we’ll need public transport investment and better use of urban land”. Overall the second-most influential argument was “Doing nothing is not an option – we need to address our car dependency now and provide better transport options for visitors and residents.”

- **Spending money on improving Canberra’s bus network versus light rail** – Without providing further context, 54% of residents agree that money would be better spent on improving the bus network. However, when long-term benefits of light rail are considered (such as a cleaner environment, better transport access and more jobs and investment for Canberra), 57% of Canberrans supported spending money on light rail and 31% supported spending on the bus network.

- **Public-Private Partnership (PPP)** – The majority of Canberra residents (66%) knew what a public-private partnership arrangement was and 58% believed it would be a good financing solution for the project.

- **Public support for the project** – The highest proportion 46% of Canberrans supported the first stage of light rail as currently proposed (40% did not). The majority of Canberra residents (54%) supported ACT Government plans to develop the Capital Metro for Canberra. When Canberra residents understood that the Capital Metro is part of a wider plan to connect the whole city with an integrated transport system, support levels increased to 72%. Support for the Capital Metro increased as the age of the respondent decreased, although the majority of all age groups (except for those over 65) supported the ACT Government plans to develop light rail. Those with higher education qualifications were also more likely to support the project than those with lower levels of education.

- **Perceived most important considerations when planning for future stages** – Ensuring as many people as possible to use the light rail network (36%), followed by generally aiming to achieve overall value for money for Canberra (combining coverage, patronage and development potential) (27%) were the most commonly selected priorities for future stages of the project.
Capital Metro costs in the context of spending on ACT roads – The highest proportion of ACT residents (45%) reported that knowing that the ACT spent 1 billion dollars on roads in the last 10 years, made them consider the expected cost of the Capital Metro more reasonable. Thirty-five per cent (35%) disagreed and 20% were unsure.
DETAILED RESULTS

BRAND / COMMUNICATIONS / CHANNELS

Q1. Have you heard about the light rail project for Canberra?

Eighty-seven per cent (87%) of respondents had heard about the light rail project for Canberra. Eleven per cent (11%) had not heard about it, and two per cent (2%) were unsure.

Q2. Can you tell me what the name of the light rail project is?

Of the people who had heard about the light rail project, twenty-one per cent (21%) could correctly name the project (Capital Metro), but seventy-nine per cent (79%) either could not name it correctly or did not know its name. Brand awareness results were almost the same as for the June 2014 cycle of the survey when 20% knew the project’s brand name (un-prompted).
Q3. Where do you get your information about the Capital Metro light rail system?

Sixty-seven per cent (67%) of participants received their information about the Capital Metro from television, radio news, or advertisements. Half (50%) received their information from the Canberra Times or newspapers (on or offline). Other sources included social media (10%) and community newspapers and magazines (9%).

Base min = 1230
Q4. Why do you think the government is investing in light rail?

- 1) To upgrade/improve transport options generally: 31%
- 2) Reduce or prevent traffic congestion: 26%
- 3) For political reasons: 20%
- 4) Planning for the future: 20%
- 5) To provide an environmentally friendly transport option or to become a more sustainable city: 7%
- 6) To promote a healthy lifestyle: 2%
- 7) Unsure: 15%

**Base = 1230**

**Note:** Percentages in this graph total more than 100% as respondents could select more than one option.

Thirty-one per cent (31%) of respondents believed the Government is investing in light rail to upgrade or improve the transportation options, and 26% thought it was to reduce or prevent traffic congestions. The proportion who thought the project was for political reasons (20%) was the same as those who thought the Capital Metro was to better plan for future needs. Fifteen per cent (15%) of the ACT adult population were unsure why the Government is investing in light rail.
Supporters of the Capital Metro project are most likely to believe the ACT Government is investing in light rail to upgrade and improve transport options generally (42%) and to reduce or prevent traffic congestion (34%). Non-supporters are most likely to be unsure about why the Government is pursuing light rail (30%) followed by a belief that the project is for political reasons (29%).
Q5. Were you aware that the ACT Government has publically released the business case showing the expected costs and benefits of the Capital Metro light rail system online?

Of the householders who had heard about the light rail project, just over half (51%) were aware that the ACT Government had released the business case online, while 49% were not aware of this.

Q5. Breakdown by supporters and non-supporters

Majority of non-supporters (58%) were aware of the public release of the Capital Metro business case which was higher than for supporters (47%).
Q6. Have you read the Capital Metro business case?

Of the participants who were aware the release of the business case, eighteen per cent (18%) had read it. Eighty-two per cent, though, (82%) had not yet read the business case.

Q6. Breakdown by supporters and non-supporters

Similar proportions of supporters (83%) and non-supporters (80%) had not yet read the business case.
Q7. How satisfied are you that it (the business case) addressed any concerns you may have had about the project?

Base $n = 97$

Of the minority of Canberrans who had read the business case, opinion was mixed regarding whether the business case addressed the reader’s concerns. Forty-eight per cent (43% satisfied and 5% very satisfied) of readers were satisfied overall, while the same proportion overall (48%) was either dissatisfied or very dissatisfied that the business case addressed their project concerns.

Q7. Breakdown by supporters and non-supporters

Base $n = 96$

Almost all supporters (87%) were satisfied with the questions answered in the business case while, 95% of non-supporters were dissatisfied with the ability of the business case to answer their concerns.
Q8. Do you think traffic congestion is a problem in Canberra NOW?

The majority (51%) of Canberra residents believed that traffic congestion is not a problem in Canberra now, although a high proportion (42%) did.

Q8. Breakdown by supporters and non-supporters

Supporters of light rail tended to think traffic congestion is a problem in Canberra now (50%) whereas only 30% of non-supporters believe this is currently a problem.
Q9. Do you think traffic congestion will be problem for Canberra in the future?

Seventy-nine per cent (79%) of Canberra residents believed that traffic congestion will be a problem for Canberra in the future. Thirteen per cent (13%) thought it would not be a problem, and 8% were unsure.

Q9. Breakdown by supporters and non-supporters

The majority of both supporters (88%) and non-supporters (66%) believed that traffic congestion will be a problem in the future.
MESSAGES

Q10. I’m going to read out a list of messages about the Capital Metro. On a scale of 0 = Very Weak to 10 = Very Strong, can you tell me how strong each message is, in terms of being a strong argument FOR having a light rail system in Canberra?

All messages had an average rating of above 5 out of 10. Of the messages posed, the three strongest arguments for having a light rail system were; the ‘growing population’ message with a mean score of 7.0, followed by ‘Doing nothing is not an option / need better transport options’ (6.8), and the ‘future of our local environment and health depend on breaking car dependency..’ message with a mean rating of 6.6 out of 10.
Q10. Breakdown by supporters and non-supporters

Non-supporters generally had a more negative perception about these messages than supporters. All messages appeared to be quite strong arguments for supporters (between 6.7 to 7.8 out of 10). For non-supporters, the strongest argument for having a light rail system was ‘Canberra is growing towards a population of 600,000 by 2050...’, followed by the ‘Doing nothing is not an option...’ message.
USE OF PUBLIC TRANSPORT

Q11. How would you mostly get to work (or travel around Canberra if you don’t work)?

- Drive: 81%
- Take a bus: 12%
- Walk: 3%
- Cycle: 2%
- Take a taxi: 1%
- Other: 1%

Base n = 1227

Eighty-one per cent (81%) of respondents drive to their work, and twelve per cent (12%) take a bus. Walking, cycling and taxi together represent six per cent (6%) of the population. These results are consistent with the June 2014 survey cycle.
Q12. How many cars does your household have?

Half (50%) of Canberra households owned two cars, and 31% households owned one.
Q13. Would you be more likely to use public transport if it involved a light rail system within easy walking distance or was accessible via other means?

Fifty-nine per cent (59%) of Canberra residents would be more likely to use public transport if it involved a light rail system within easy walking distance or was accessible via other means. This is up marginally from the June 2014 survey cycle where 57% agreed. Thirty per cent (30%) of Canberra residents would not be more likely to use public transport (although this result is 4% lower than the June 2014 survey). The proportion of those who are unsure (11%) has increased marginally from June (from 9%).

Q13. **Breakdown by age distribution**
Younger people were more likely to believe they would use a public transport system involving light rail than older people, although the majority of all age groups, excepting over 65 year olds, would be more likely to use public transport if it involved an accessible light rail system.

Q14. Is the money better spent on improving Canberra’s bus network?

Base n = 1070

Without providing further context when asking the question to survey respondents, 54% considered the money would be better spent on improving the bus network. Twenty-six per cent (26%) disagreed, and twenty per cent (20%) were unsure.

Q15. Would you support money being spent on a light rail system rather than buses if you knew there would be more long-term benefits for Canberra e.g. cleaner environment, better access and more jobs and investment?

Base n = 1226
When respondents considered long-term benefits of the project such as a cleaner environment, better access and more jobs for Canberra, the majority of Canberrans (57%) supported the money being spent on a light rail system. Thirty-one per cent (31%) would still want the money to be spent on buses.

**Public Private Partnership**

Q16. The ACT Government intends to fund the Capital Metro construction and operation through a ‘Public-private partnership’ arrangement. Do you know what a public-private partnership is?

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
<th>Unsure</th>
</tr>
</thead>
<tbody>
<tr>
<td>66%</td>
<td>28%</td>
<td>6%</td>
</tr>
</tbody>
</table>

*Base n = 1222*

Sixty-six per cent (66%) of respondents knew what a public-private partnership model was. Twenty-eight per cent (34%) did not know or were unsure.

**Q16. Breakdown by supporters and non-supporters**

- **Yes, I know what a PPP is**
  - Supporter: 66%
  - Non-Supporter: 70%

- **No, I don’t know what a PPP is**
  - Supporter: 30%
  - Non-Supporter: 25%

*Base n = 1220*

Both supporters and non-supporters had similar awareness levels about public-private partnerships. Sixty-six per cent (66%) of supporters and 70% of non-supporters were familiar with the term.
Q17. A public-private partnership is an arrangement between the government and the private sector to build and operate the system. The private sector builds, finances and operates the system. The government would pay for the system by making regular annual payments over 20 years, but will only start paying for the system once it is working and fully operational. Do you think a Public Private Partnership is a good solution to finance the light rail?

The majority (58%) of Canberra residents believed that a public-private partnership would be a good solution to finance the light rail. Twenty-two per cent (22%) disagreed and 20% were unsure.

**Q17. Breakdown by supporters and non-supporters**

The majority (74%) of supporters believed a public-private partnership was a good financing solution for the Capital Metro whereas the majority (51%) of non-supporters disagreed that it was a good solution.
INFLUENCERS / SUBJECTIVE NORMS

Q18. Do you think your family and friends would want a new light rail system for Canberra?

The highest proportion of Canberrans (43%) thought their family and friends would want a light rail system in Canberra. Thirty-three per cent (33%) did not and 24% were unsure. Three per cent fewer people thought that their family and friends would want a new light rail system for Canberra, than in June 2014 (46%) although this would be considered a marginal change.

Q18. Breakdown by supporters and non-supporters

The majority of supporters believed their family and friends would also support the project (68%), whereas the majority of non-supporters (79%) believed their family and friends would not.
AWARENESS / SUPPORT

Q19. Do you support the first stage of light rail as currently proposed?

Of the residents who had heard about the Capital Metro project, the largest group (46%) supported the first stage of light rail as currently proposed. Forty per cent (40%) did not support it as currently proposed, and 15% did not know.

Q19. Breakdown by supporters and non-supporters

Almost all supporters (80%) supported the first stage as currently proposed. Conversely, almost all non-supporters (94%) disapproved of the first stage plan as currently proposed.
Q20. Do you support the ACT Government plans to develop the Capital Metro light rail system for Canberra?

The majority (54%) of Canberra residents supported ACT Government plans to develop the Capital Metro for Canberra. Thirty-two per cent (32%) did not and fourteen per cent (14%) were unsure. Results were similar to June 2014 where 55% supported ACT Government plans. The proportion who answered ‘unsure’ increased slightly from 11% to 12%.

Q21. Are you aware that there is a Light Rail Master Plan that is looking at a city-wide network?

While the majority (54%) were aware there is a Light Rail Master Plan looking at a city-wide network, a high proportion (46%) were not aware of this or reported being ‘unsure’.
FUTURE EXTENSION OPTIONS

Q22. I’m going to read out 10 locations that the light rail could be extended to in future stages of the project. Where do you think that light rail should be extended to next after the Gungahlin to City stage?

- E) Airport to the city: 23%
- J) Don’t know: 21%
- G) Tuggeranong to the city: 20%
- A) Belconnen to the city: 12%
- B) Mawson and Woden to the city: 8%
- C) Parliamentary Triangle to the city: 8%
- H) Weston Creek to the city: 3%
- D) Russell to the city: 3%
- F) Fyshwick to the city: 2%
- I) Molonglo to the city: 1%

Base n = 1069

Relatively popular future extension options for the light rail system included airport to the city and Tuggeranong to the city. A relatively high proportion of Canberrans (21%), representing the second-highest response, did not know where the Capital Metro should be extended to after the Gungahlin to City stage.
Q22. Breakdown by supporters and non-supporters

The most popular extension routes for supporters and non-supporters were airport to the city, Tuggeranong to the city and Belconnen to the city.
Q23. Would you support the Capital Metro light rail system if you knew it was part of a wider plan to connect the whole city with an integrated transport system?

Seventy-two per cent (72%) of Canberrans who were aware of the Capital Metro light rail project, would support the system if they knew it was part of a wider plan to connect the whole city with an integrated transport system.

**Q23. Breakdown by supporters and non-supporters**

Almost all supporters (96%) would support the light rail system after knowing it was part of a wider plan to connect the whole city with an integrated transport system. A substantial proportion (35%) of current non-supporters would become supportive after knowing of the wider integrated transport plan. The majority of current non-supporters, though (54%) remained unsupportive.
Q24. Which one of the following 4 priorities is the most important consideration when planning for future stages of the light rail project?

Base \( n = 1009 \)

The highest proportion of Canberrans (36%) identified ‘ensuring as many people as possible use the light rail network’ as the most important consideration when planning future stages of the light rail project. Achieving overall value for money for Canberra was the second-most common response (27%) closely followed by extending coverage to South Canberra (26%).
Q24. Breakdown by supporters and non-supporters

The supporters and non-supporters had different opinions on priorities. Supporters considered ensuring as many people as possible to use the networking as being the most important priority (42%), however non-supporters focused on achieving overall value for money (40%).

Base n = 1007
Q25. Over the last 10 years, the ACT spent 1 billion dollars on the road network. Does knowing this make the expected $610 million to $783 million cost of the Capital Metro more reasonable?

The highest proportion of ACT residents (45%) reported that knowing that the ACT spent 1 billion dollars on roads in the last 10 years, makes them consider the expected cost of the Capital Metro more reasonable. Thirty-five per cent (35%) disagreed and 20% were unsure.

Q25. Breakdown by supporters and non-supporters

Answers were again polarised with 68% of supporters considering the Capital Metro cost more reasonable given the money spent on the road network and 77% of non-supporters disagreeing.
DEMOGRAPHICS

Q26. In what year were you born?

The age distribution of collected data closely matched the distribution published by the ABS (June 2011)\(^1\).

<table>
<thead>
<tr>
<th>Age Distribution</th>
<th>ABS Data</th>
<th>Piazza Research Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-29</td>
<td>24%</td>
<td>19%</td>
</tr>
<tr>
<td>30-45</td>
<td>29%</td>
<td>29%</td>
</tr>
<tr>
<td>46-65</td>
<td>32%</td>
<td>32%</td>
</tr>
<tr>
<td>Above 65</td>
<td>15%</td>
<td>20%</td>
</tr>
</tbody>
</table>

\(^1\) 3235.0 - Population by Age and Sex, Regions of Australia, 2011
Q26. Overall support percentage by age category (by Q20)

![Bar chart showing overall support percentage by age category.](chart1.png)

Base n = 1226

Q26. Support percentage for the first stage plan by age category (by Q19)

![Bar chart showing support percentage for the first stage plan by age category.](chart2.png)

Base n = 1065
The level of support for the Capital Metro light rail project was inversely related to the age of the respondent. That is, the older a person was, the less likely they were to support the project. Younger respondents were more likely to support the project. The majority of all age groups except for those aged above 65 years supported the ACT Government plans to develop the Capital Metro light rail system for Canberra.

Q27. What is the highest level of education you have achieved so far?

Forty-five per cent (45%) of respondents held a Bachelor degree or higher. All participants at least completed their secondary education (Year 7-12).
Q27. Overall support percentage by education level (by Q20)

Support for the Capital Metro project increased as the education level of respondents increased.
Forty-one per cent (41%) of survey respondents were from an adult couple only household, 29% represented a couple with dependent children, and 15% were one-person households without children.
Q29. Gender

From ABS data 2012\(^2\), the ACT had a gender distribution of fifty per cent (50%) male and fifty per cent (50%) female. The gender distribution for this survey aligned closely with ABS data.

**Q29. Breakdown by supporters and non-supporters**

Support rates for the Capital Metro project were slightly higher for males (56%) than for females (52%) although a majority of both groups supported the project.

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\(^2\) 3222.0 - Population Projections, Australia, 2012 (base) to 2101
**Q30. What is your postcode?**

<table>
<thead>
<tr>
<th>POSTCODE</th>
<th>Percentage %</th>
<th>Sample size n</th>
</tr>
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<tbody>
<tr>
<td>2615</td>
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<td>1%</td>
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<tr>
<td>2600</td>
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</tr>
<tr>
<td>Total</td>
<td>100%</td>
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</tr>
</tbody>
</table>

*Base n = 1176*

Data sample sizes that are substantially less than 30 are considered insufficient to calculate a reliable result for an individual suburb, and are marked as **Red**. These are not taken into account in the thematic map of support by suburb below.

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Thematic map of support by suburb

This map illustrates that the majority of suburbs across Canberra have a majority of residents who supported the ACT Government’s plans to develop light rail for the ACT (Q20) (shaded green). Calwell is the only suburb having a majority who oppose the ACT Government’s plans (shaded red). Areas shaded in grey represent suburbs without a clear majority of support or opposition.
Comparison over time

Question: (Dec) Have you heard about the light rail project for Canberra? / (Jun) Do you know what a light rail is?

(Note: Not directly comparable as question changed from June to Dec)

Question: How would you mostly get to work (or travel around Canberra if you don’t work)?

Question: Would you be more likely to use public transport if it involved a light rail system within easy walking distance or was accessible via other means?

(Note: Correct answers for June and December have been calculated and compared.)
Question: Do you think your family and friends would want a new light rail system for Canberra?

- Yes: 46% (Jun), 55% (Dec)
- No: 31% (Jun), 34% (Dec)
- Unsure: 23% (Jun), 11% (Dec)

Question: Do you support the ACT Government plans to develop the Capital Metro light rail system for Canberra?

- Yes: 43% (Jun), 54% (Dec)
- No: 33% (Jun), 32% (Dec)
- Unsure: 24% (Jun), 14% (Dec)