

# RETURN TO RAIL INSIGHTS

DECEMBER 2022



# RETURN TO RAIL INSIGHTS

## ABOUT THE RESEARCH

The Australasian Railway Association (ARA) commissioned Zing Insights to complete consumer research to assess how our use of rail transport has changed compared to before the COVID-19 pandemic, and identify the factors that would support greater use of rail in the future.

2500 people who live within 5km of a rail station or light rail stop in Sydney, Melbourne, Brisbane, Adelaide and Perth were surveyed in November 2022 as part of the project.

## KEY FINDINGS

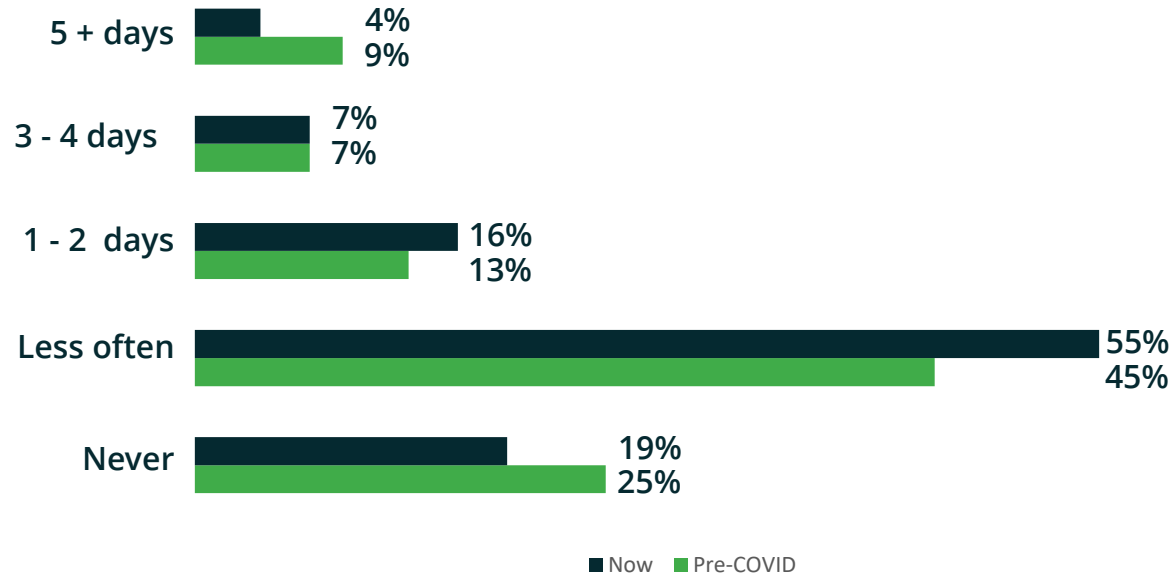
- 25 per cent of people say they plan to use rail more over the next six months, with a desire to get out more being the most common reason (27 per cent)
- Increasing cost of living pressures is likely to drive greater public transport use, with people citing rising petrol prices (39 per cent), traffic congestion (31 per cent) and increasing parking fees (25 per cent) as among the reasons people would consider using rail more
- The wave of new rail projects currently underway is expected to support stronger use of rail as it enables more frequent services and greater convenience for public transport users. More frequent services was the top improvement (43 per cent) people identified to encourage them to use rail more, while lack of convenience was identified as a barrier to increased use of rail.
- The importance of increased cleaning and hygiene measures introduced during the pandemic was highlighted, with 30 per cent of respondents identifying increased cleaning as an important driver for greater use of rail.

# RETURN TO RAIL INSIGHTS

## HOW OUR HABITS HAVE CHANGED

Overall, 24 per cent of people are using rail less compared to before the pandemic. However, fewer people say they never use rail compared to 2019. People are working from home more often, with 67 per cent of people expecting their work patterns to stay the same in the near future.

### WEEKLY USE OF RAIL



### WEEKLY WORK PATTERNS

**33%** of work is done from home now, compared to 17% pre-COVID.

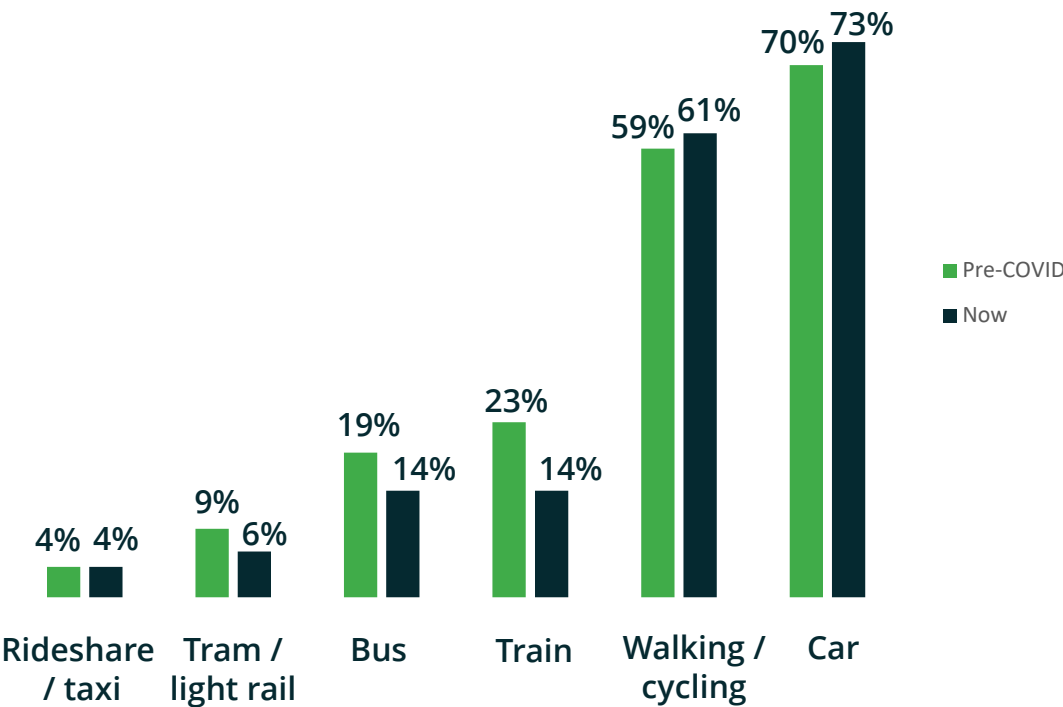
People are working outside of home an average of **3.5 days per week**, compared to 4.1 days pre-COVID.

# RETURN TO RAIL INSIGHTS

## HOW OUR HABITS HAVE CHANGED

People are driving, walking or cycling on a regular basis more, and using public transport less, compared to before the pandemic.

USE OF TRAVEL MODES AT LEAST THREE TIMES A WEEK





# SUPPORTING GREATER USE OF RAIL

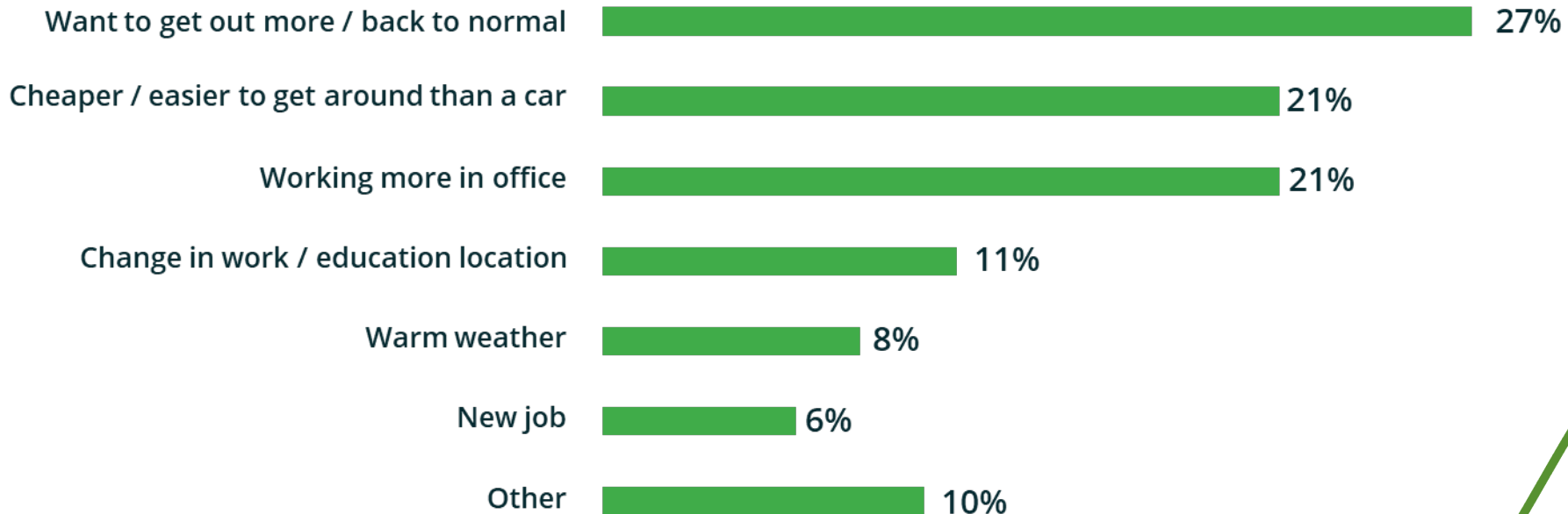


# RETURN TO RAIL INSIGHTS

## WHY PEOPLE WILL USE RAIL MORE IN THE NEXT SIX MONTHS

One in four people (25 per cent) said they were likely to use rail more often in the next six months, as they start to get out more, with public transport providing a cheaper option compared to using the car.

### WHY ARE YOU LIKELY TO INCREASE YOUR USE OF RAIL IN THE NEXT SIX MONTHS?



# RETURN TO RAIL INSIGHTS

## WHO WILL RETURN TO RAIL MORE

More Sydney residents and people under 35 years of age are planning to use rail more.

### VERY OR QUITE LIKELY TO INCREASE THEIR USE OF RAIL IN THE NEXT SIX MONTHS

LOCATION	PERCENTAGE
Sydney	30%
Melbourne	26%
Brisbane	22%
Perth	24%
Adelaide	23%

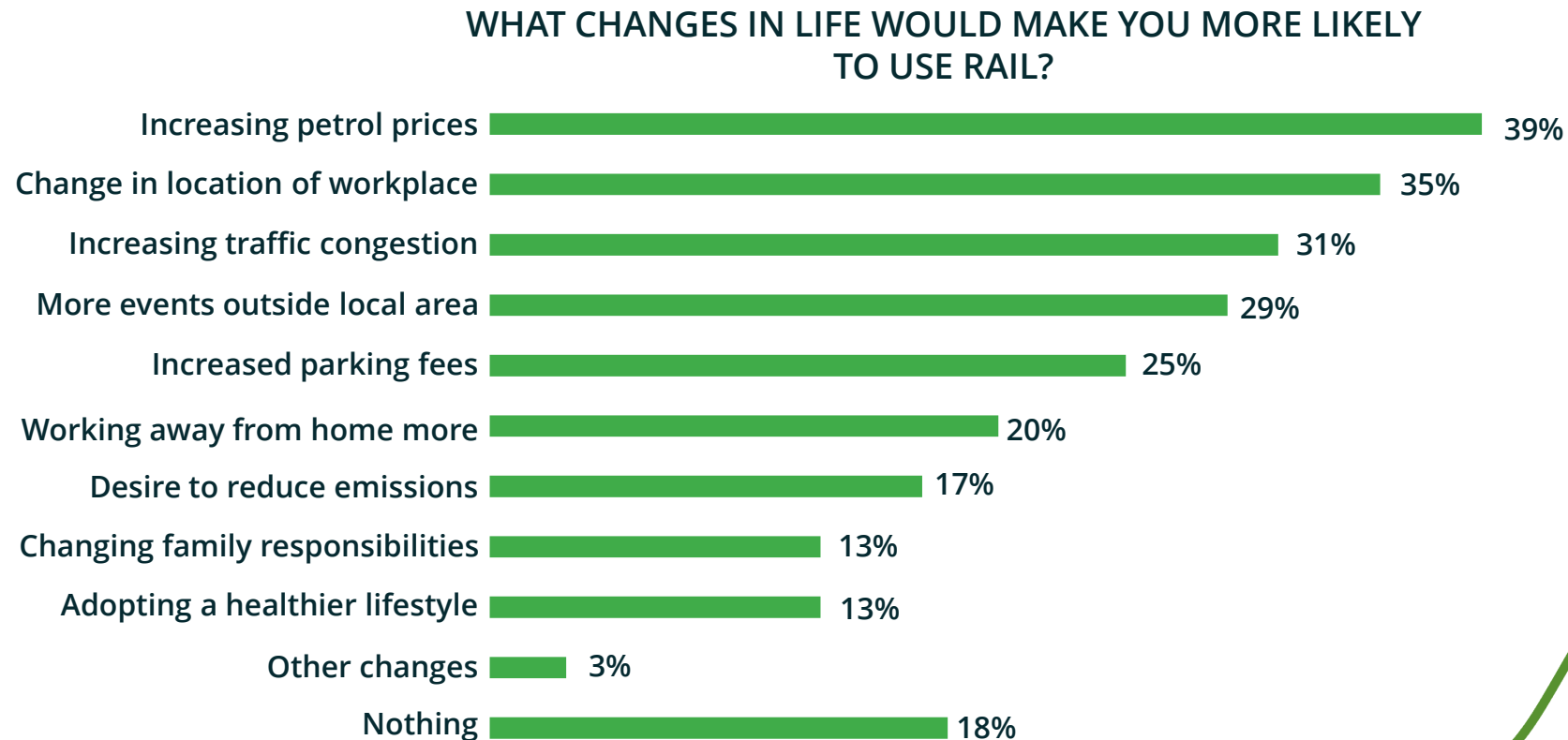
AGE	PERCENTAGE
<35	32%
35-50	24%
50-64	20%
65+	21%



# RETURN TO RAIL INSIGHTS

## DRIVERS TO SUPPORT GREATER USE OF RAIL

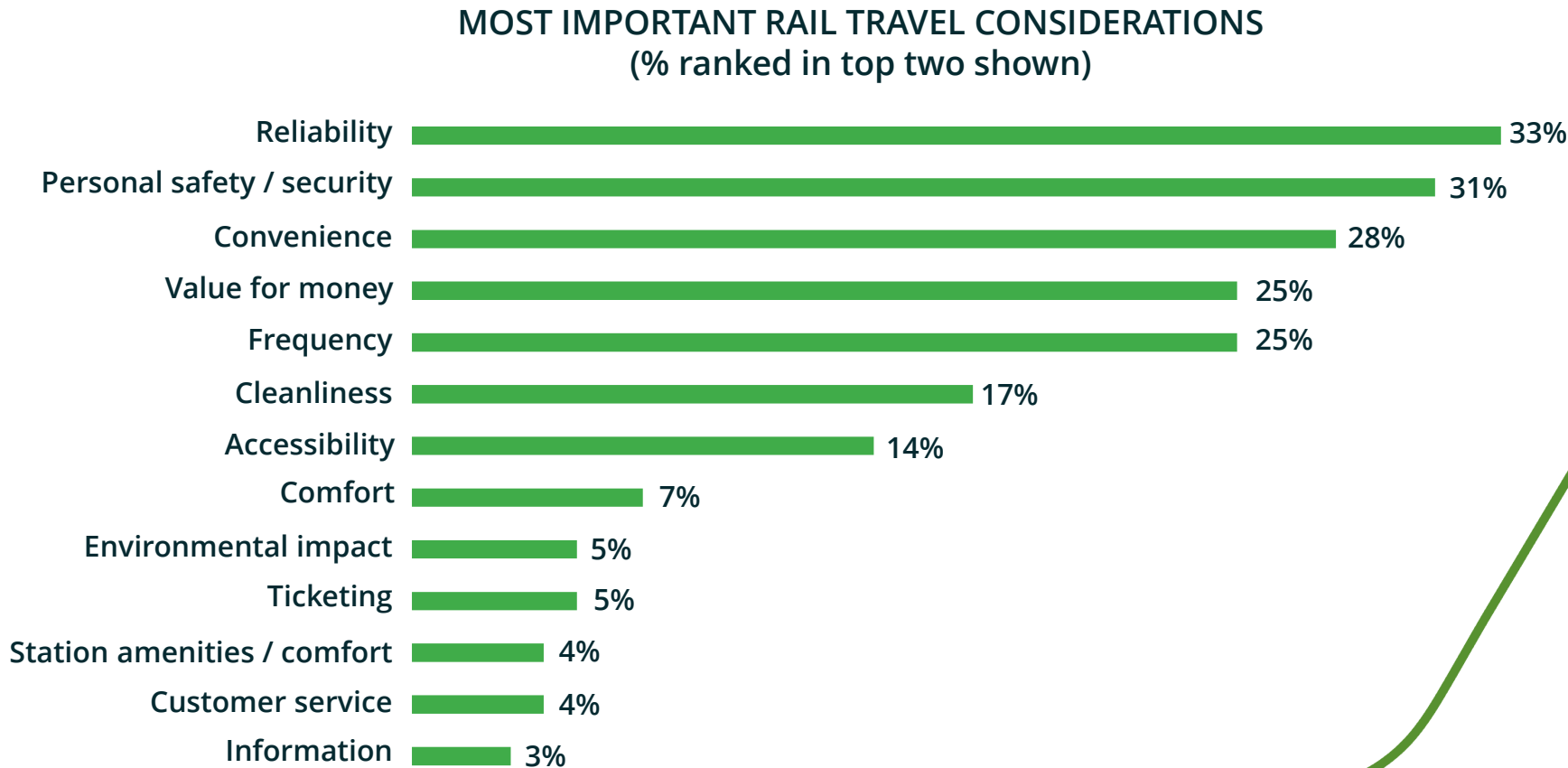
Cost of living pressures such as increasing petrol prices, traffic congestion and parking fees represent a significant opportunity to increase rail patronage.



# RETURN TO RAIL INSIGHTS

## PRIORITIES FOR RAIL TRAVEL

Reliability, safety and security, and convenience matter most when people are travelling by rail.



## INITIATIVES TO ENCOURAGE MORE TRAVELLERS TO INCREASE THEIR USE OF RAIL

Almost half (43 per cent) of people said more frequent services would encourage them to use rail more. New rail projects underway will help deliver on this demand. The results also highlighted the importance of increased cleaning and hygiene measures introduced by industry during the pandemic – and continuing today – with this one of the top five issues to encourage greater use of rail.

### INITIATIVES THAT WOULD ENCOURAGE YOU TO USE RAIL MORE OFTEN

#### MOST ENGAGING

- More frequent services **43%**
- More express services **37%**
- More visible security **36%**
- Loyalty program for frequent travellers **31%**
- More regular cleaning on trains/trams **30%**

#### MODERATELY ENGAGING

- Seamless connections to bus services at stations **29%**
- Free Wi-Fi on board **28%**
- More comfortable trains/trams **26%**
- Dedicated quiet carriages **23%**
- Real time information on capacity **23%**
- Improved station facilities **22%**

#### LESS ENGAGING

- More cycle paths or footpaths to connect you to rail stations/stops **13%**

## INITIATIVES TO ENCOURAGE MORE TRAVELLERS TO INCREASE THEIR USE OF RAIL

Survey participants were also asked to share their own ideas on initiatives that would improve their willingness to use public transport more. Many of these suggestions, including increased frequency and number of services; expanding the network; and better connections to other modes; will be supported by new rail projects underway.

### OTHER SUGGESTIONS TO IMPROVE RAIL CONSIDERATION

- Make rail travel less expensive
- Improve frequency or number of services
- Make rail travel safer
- Improve car parking (cheaper, better access)
- Expand network (stations, routes)
- Better connections to other modes
- Increase number of carriages during peak time (reduce crowding)
- Consider free public transport for some/all



# RETURN TO RAIL INSIGHTS

## THE CHANGING SCHOOL COMMUTE

Two thirds (65 per cent) of people with children said their kids were using rail the same amount or more often.

Of those who were using rail less, being driven to school or education more was the primary reason for their changing travel habits.

### REASONS FOR CHILDREN USING RAIL LESS

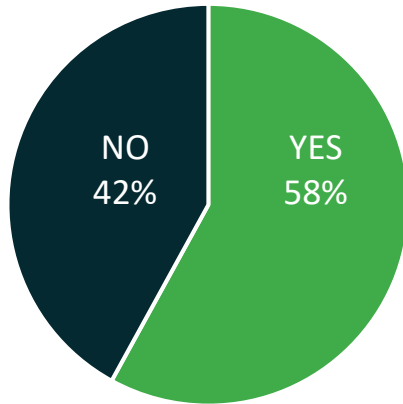


# SUPPORTING OUR **NET-ZERO FUTURE**

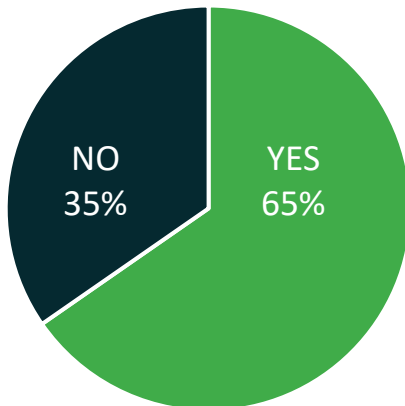


# RETURN TO RAIL INSIGHTS

## ARE YOU CONSIDERING WAYS TO REDUCE YOUR CARBON FOOTPRINT



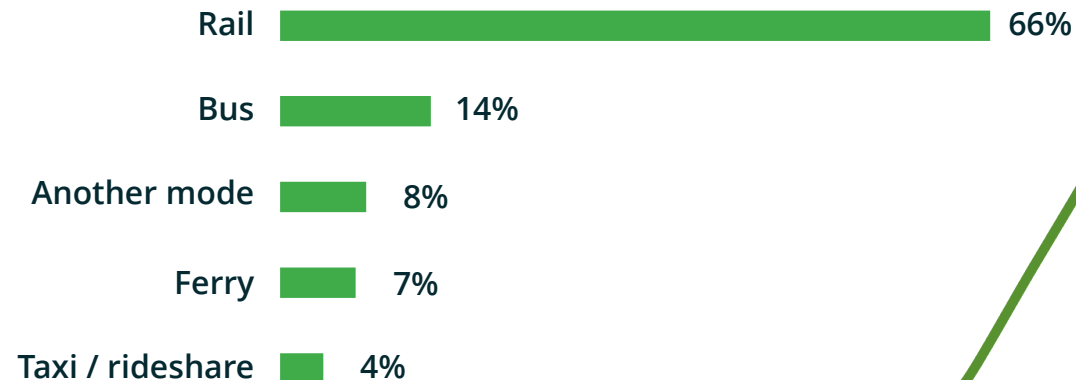
## ARE YOU CONSIDERING GREATER USE OF PUBLIC TRANSPORT TO REDUCE YOUR CARBON FOOTPRINT



## INCREASING USE OF RAIL TO REDUCE OUR CARBON FOOTPRINT

Rail was recognised by two thirds (66 percent) of people as the most sustainable transport mode. Just under two thirds of people (65 percent) looking to reduce their carbon footprint are considering greater use of public transport to support this. However, only 32 per cent said they were likely to make changes in the next 12 months.

## WHICH MODES DO YOU CONSIDER TO BE THE MOST ENVIRONMENTALLY SUSTAINABLE?





# POTENTIAL BARRIERS TO GREATER USE OF RAIL

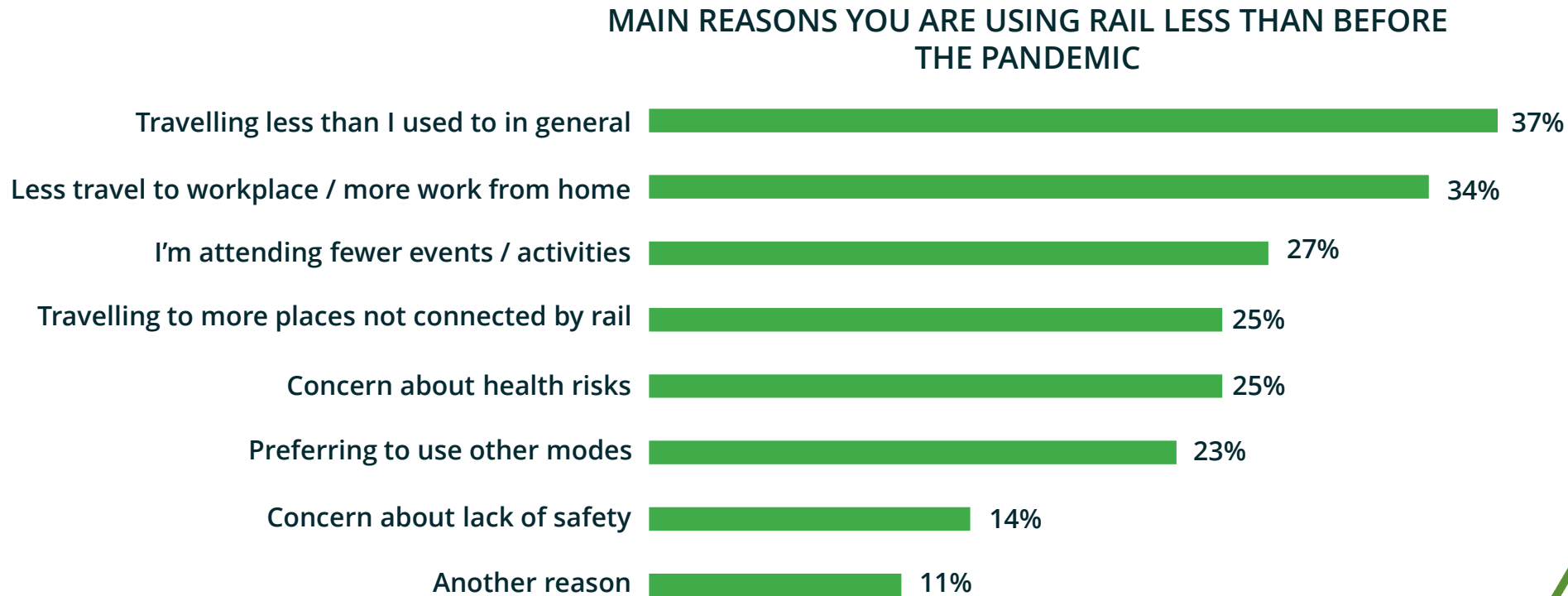




# RETURN TO RAIL INSIGHTS

## WHY SOME PEOPLE ARE TRAVELLING LESS

For the 24 per cent of people using rail less compared to before the pandemic, the most common reasons were they were getting out less or working from home more.



## WHO IS TRAVELLING LESS OFTEN

More Sydney residents and people under 35 years of age are travelling less often at the moment. However, they are also planning to travel more in the next six months.

### USING RAIL LESS FREQUENTLY THAN PRE-COVID

LOCATION	PERCENTAGE
Sydney	33%
Melbourne	24%
Brisbane	24%
Perth	20%
Adelaide	18%

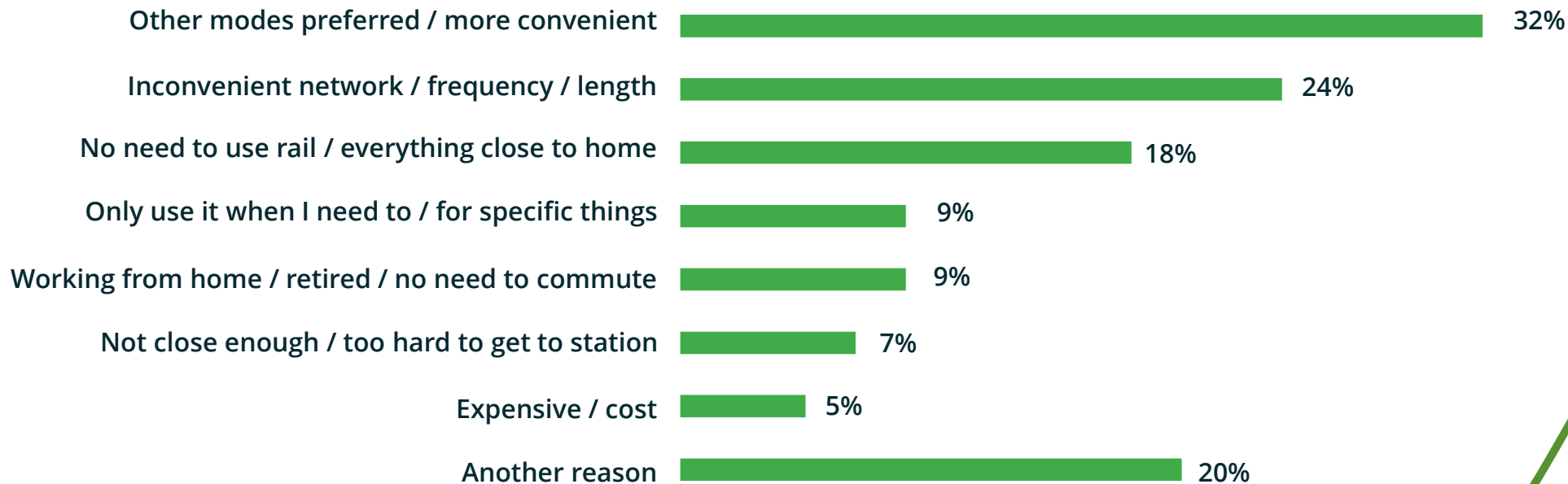
AGE	PERCENTAGE
<35	31%
35-50	25%
50-64	21%
65+	10%

# RETURN TO RAIL INSIGHTS

## WHY PEOPLE ARE NOT USING RAIL MORE

For those that don't use rail often, a preference for other modes and focus on convenience are the main barriers to greater use of rail.

### WHY AREN'T YOU USING RAIL MORE THAN YOU DO NOW?

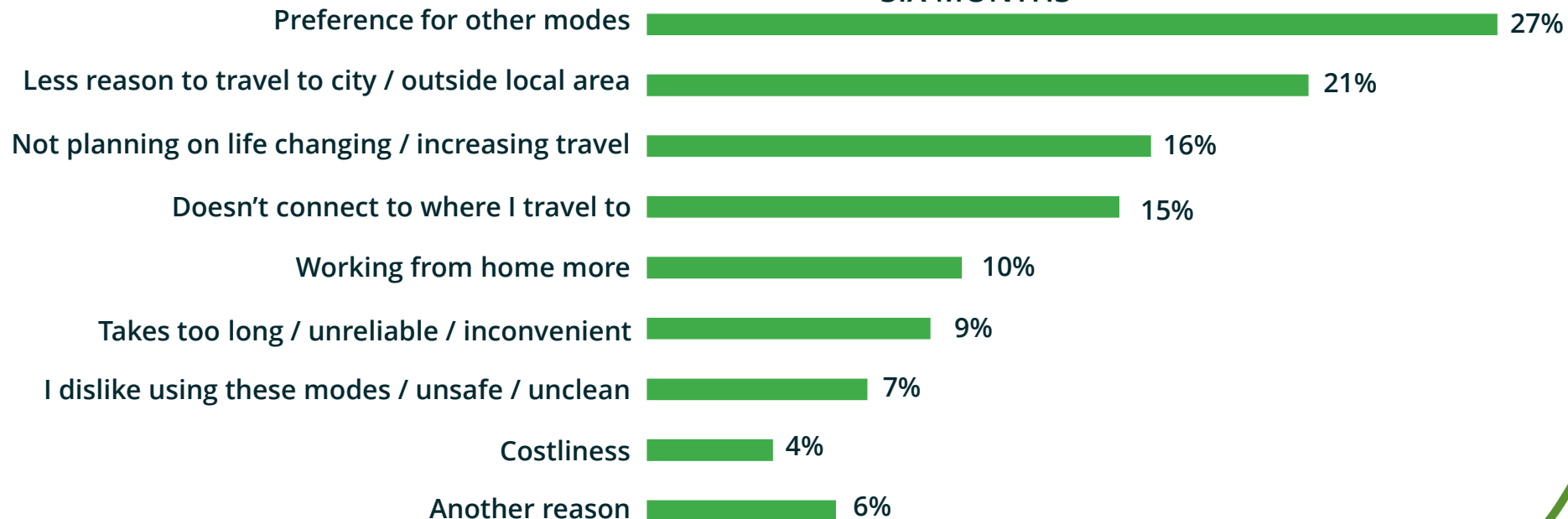


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## BARRIERS TO INCREASING RAIL USE

A preference for other modes was the main reason people said they were unlikely to use rail more in the next six months. Not travelling as much was also a common reason.

### WHY ARE YOU UNLIKELY TO INCREASE YOUR USE OF RAIL IN THE COMING SIX MONTHS





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## CONCERNS ABOUT RAIL TRAVEL

Just over one third of people (38 per cent) had no specific concerns about rail travel. Crowding and COVID risk were the main issues raised by those with at least one specific concern.

