

# **Benchmark and evaluation research: Proposed Western Sydney Airport**

**A GfK Australia report  
(W5 December 2016)**

Prepared for:

The Western Sydney Unit  
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# 1 THE RESEARCH APPROACH

## 1.1 Overview of approach

GfK developed a program involving six waves of online surveys (one benchmark and five tracking waves) with a representative sample of the Western Sydney community or public. This report covers Wave 5 of the program conducted in early December 2016.

Prior to this current wave of research, in August 2016 GfK also conducted a separate ad-hoc quantitative survey into the attitudes of Western Sydney residents toward transport infrastructure and, more specifically, rail options for the proposed Western Sydney airport at Badgerys Creek. Qualitative research coinciding with the August 2016 wave of research was also completed. GfK conducted eight discussion groups, lasting two hours and comprising eight to nine respondents per group. The sample comprised a representative sample from within the Western Sydney region (taking into account factors such as location, proximity to the airport site, age, occupation, gender and cultural background). The overall objective of this qualitative research was to gain a deeper, more nuanced understanding of awareness and attitudes towards the airport project and the need for a rail connection.

In addition to the research components mentioned above, there have also been two workshop sessions with local, regional, state and indeed national stakeholders such as: industry groups (e.g. Sydney Business Chamber, Tourism and Transport Forum etc.), environment and heritage groups, Western Sydney local government authorities (e.g., WSROC), and others. The full research program plan is outlined below.

Overall project set-up	Project Inception			
	Meet the teams, discuss proposed project parameters and setup of research program; share previous research and relevant reports, agree milestones and deliverables			
Community	Questionnaire development and testing	Benchmark survey	Post Strategy tracking survey (5 waves)	Rail Attitudes ad-hoc survey
	GfK to develop draft questionnaire	Online survey N=500 people aged 18 years and older –10 minutes' duration	Online survey N=500 people aged 18 years and older –12 minutes' duration	Online survey N=500 people aged 18 years and older –15 minutes' duration
	Cognitive testing (x4) among select demographic and audience groups	Stratified sample with quotas set for age, gender and location representation ~ 30% CALD and n=10 Indigenous	Stratified sample with quotas set for age, gender and location representation ~ 30% CALD and n=10 Indigenous	Stratified sample with quotas set for age, gender and location representation ~ 30% CALD and n=10 Indigenous
		➡Topline debrief and report of benchmark findings	➡Topline debrief and summary report of benchmark vs. wave findings	➡Topline debrief and summary report
	Qualitative focus groups			
	8 discussion groups, lasting 2 hours and comprising 8-9 respondents per group			
	Sample comprises a representative sample from within the Western Sydney region (taking into account factors such as location, proximity to the airport site, age, occupation, gender and cultural background)			
Stakeholders	Workshop discussion guide development	Review of benchmark findings	Post launch workshops (2 sessions)	
	GfK to develop draft discussion guide	And of other publicly available material leading to the Strategy.  No independent benchmark findings re Stakeholders will be collected	Workshops with stakeholders (recruit 15-20 participants) to discuss awareness, response to and fine-tuning of the Strategy  ➡Topline debrief and summary report of session	
Overall Strategy evaluation	Final Evaluation			
	Full campaign evaluation with process and outcome evaluation analysis of stakeholders and community			
	• Formal report in MS Word			
	• Web or teleconference presentation of results			

This report includes findings from the quantitative online benchmark and the five tracking surveys with community residents.

## 1.2 Notes to reading the report

### Sampling error

Because a sample, rather than the entire population of Australians will be surveyed, the percentage results are subject to sampling tolerances. On a question where 50% of the sample responds with a particular answer, in our proposed sample of 500 individuals, there is a 95% chance that this result would not vary more than (+/-) 4.38% from the result that would have been obtained from a census of the entire Australian population of the target age range.

### Significance testing

For the benchmark wave, significance testing has been conducted to compare sub-groups such as different demographics or segments. Statistically significant differences have been denoted using the following symbols:

↑↓ Significantly higher / lower at a 95% confidence interval compared to previous waves.

▲ ▼ Significantly higher / lower at a 95% confidence interval compared to the benchmark wave.

+ / - Significantly higher / lower at a 95% confidence interval compared to comparable sub-groups in the population (i.e. higher than females).

### Weighting

Wave 2-4 data was weighted to the Benchmark demographic composition for age, gender and location.

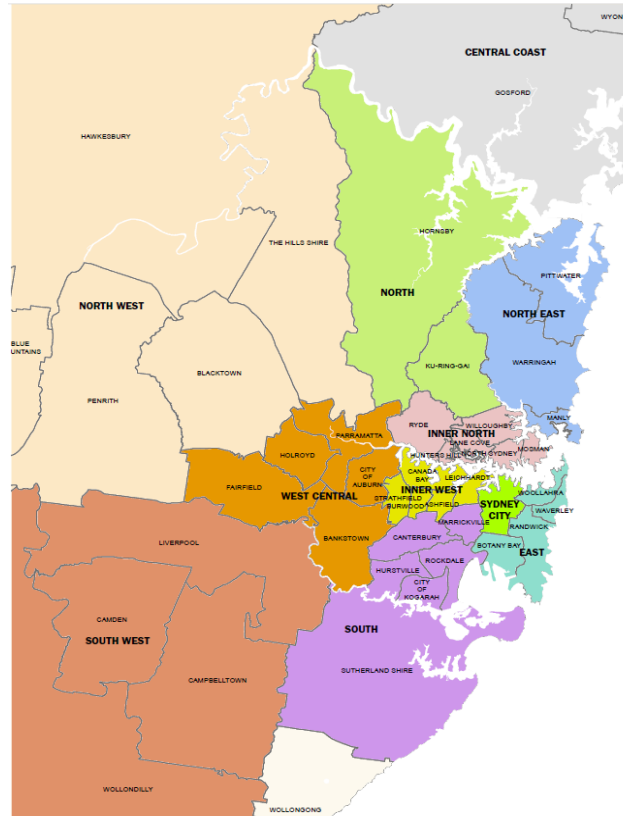
## 2 SAMPLE DESCRIPTION

To qualify for the research, screened participants were shown an image of a map (shown below) and asked to indicate the region they lived in. Only those from South West, Inner West, North West or West Central were eligible to continue.

The suburbs corresponding to the qualifying regions were as indicated by the map:

- **South West** (Camden, Campbelltown, Wollondilly, Liverpool)
- **North West** (Blue Mountains, Penrith, Hawkesbury, Blacktown)
- **Inner West** (Canada Bay, Strathfield, Burwood, Inner West council)
- **West Central** (Fairfield, Canterbury-Bankstown, Parramatta, Cumberland).

Note, regional assignment in the research is based on respondent self-classification.



Across all waves, an even spread of males and females across age groups were recruited for the survey (minimum quotas set to reflect the benchmark achievements). There were also quotas set from Wave 1 onwards to achieve a similar proportion of residents from the broad regions. Weighting was also applied post-data collection to provide further comparability between samples as mentioned above.

	Benchmark November 2014	Wave 1 June 2015	Wave 2 December 2015	Wave 3 April 2016	Wave 4 August 2016	Wave 5 December 2016	Sample %
Male	250	251	238	229	234	236	50%
Female	251	262	264	270	271	267	50%
18-34	160	171	166	156	170	166	32%
35-54	184	187	182	188	178	176	37%
55+	157	155	154	155	157	161	31%
South West	143	129	143	139	156	143	29%
Inner West	90	70	77	96	90	88	18%
North West	156	163	158	137	142	158	31%
West Central	112	151	124	127	117	114	22%
Colum n	501	513	502	499	505	503	-

### 3 RECAP OF PREVIOUS FINDINGS

#### 3.1 Recap of Benchmark findings

In the benchmark wave, the research found that:

- While most Western Sydney residents are aware the airport has been proposed and a site selected, they don't believe they know much about the development of the proposed airport.
- Overall, there is more support for the proposed airport in Western Sydney than dissent or questioning.
- It is a minority view that the negative impacts of the proposed airport would outweigh the benefits.
- Residents believe that the proposed airport would result in economic benefits.
- There are concerns (when prompted) about the impact both during construction and when the airport starts operating.
- There is a demand for more information about the development.

#### 3.2 Recap of W4 findings (August 2016)

In terms of overall perceptions and sentiment towards the proposed Western Sydney airport, very little has changed since the wave of tracking in April 2016, or from the levels seen when tracking began late in 2014.

Residents continue to be mostly positive (or neutral) towards the airport with nearly 3 in 5 (56%) in 'favour of the proposed Western Sydney Airport at Badgerys Creek'. Only a minority continue to be strongly opposed (12%). Around half (48%) continue to believe that overall, the positive benefits of an airport at Badgerys Creek would outweigh any negative impacts while around 3 in 10 (32%) have neutral views on this. This leaves much room for improvement to convert those 'on the fence' to a more positive mindset.

There also remains some differences of opinion by demographic groups, with males and residents aged 55 years or older more strongly supportive of the airport development, while females and younger residents (aged 18-34 years) were more likely to be undecided or neutral towards the proposed airport. There are only small differences in terms of attitudes by region, with the most notable difference being that those in the Inner West are a little more undecided/ambivalent towards the proposed airport. This is perhaps a result of their proximity to the site and the lower likelihood of direct impacts on their neighbourhoods when compared to the other regions covered in the study.

The most marked differences we saw this wave related to resident's perceived level of knowledge of the proposed airport (and associated developments) and their recall of airport related media and communications. It is important to mention that communication activities were minimal in the months leading up to this reporting period when compared to the higher levels seen in late 2015 and early 2016. That period saw a sharp increase in activities and media coverage relating to the draft EIS and draft Airport Plan exhibition, which translated into higher knowledge of the airport generally and more detailed knowledge of specific activities/areas related to the proposed airport. The proportion feeling they know a lot about the proposed airport has now slipped back to a level not seen since the benchmark wave over 18 months ago (19%). Awareness of the proposed site of the airport, the fact that 'assessments have shown that Badgerys Creek is the best place for a second Sydney airport' and that 'roads will be upgraded / improved to support the proposed Western Sydney Airport' has significantly declined (either compared to last wave or from benchmark levels).

As mentioned, coupled with this decline is significantly lower recall of media/communications relating to the airport (34% recall, down from 43% in April 2016). Among those who could recall communications, there also appears to be much lower recall of traditional media coverage (TV Radio, Newspapers) while more informal communications (conversations, social media) have risen moderately. Prompted

recognition of DIRD communications and activities were also significantly lower this wave (26%, down from 32%). It appears that for an increasing number of Western Sydney residents the topic of the proposed airport has really 'fallen off the radar' recently. While it still remains an important topic for many when prompted, it clearly wasn't high profile/top of mind.

As mentioned previously, it is likely that until more concrete announcements are made or more tangible outcomes come about, residents will continue to hold mostly positive, but also relatively generic knowledge about what the airport could bring to the region.

## 4 SURVEY FINDINGS

### 4.1 Sentiment over time

**Over one in two Western Sydney residents remain positive toward the proposed airport. However, one in four remain neutral towards the proposed airport, showing more can be done to promote the specific benefits and further improve perceptions.**

Residents continue to be mostly positive (or neutral) towards the airport with over one in two (56%) who are in 'favour of the proposed Western Sydney Airport at Badgerys Creek'. A minority continue to be opposed (11%).

Around half (49%) continue to believe that overall, the positive benefits of an airport at Badgerys Creek would outweigh any negative impacts, while around 3 in 10 (31%) have neutral views on this.

- While few continue to believe the reverse (negative outweighing the positives) there is room to further improve perceptions.

Note the improvements observed at the end of 2015 have not been sustained and it is suggested that for residents, sentiment will be stable until operations commence, or more announcements about the progress are made.

***As seen previously, while most are in favour, there remains a gap between those in favour and those who feel it will provide more benefits than drawbacks. This suggests the opportunity to provide more education and evidence about the benefits still exists.***

Sentiment towards the airport						
Column %	Benchmark - November 2014 (n=501)	Wave 1 - June 2015 (n=513)	Wave 2 - December 2015 (n=502)	Wave 3 - April 2016 (n=499)	Wave 4 - August 2016 (n=505)	Wave 5 - December 2016 (n=503)
Q 11. In this question we would like to know in more detail how you feel about this proposed airport in Western Sydney. Using a 0 to 10 scale, where 0 means Strongly Disagree and 10 means Strongly Agree, please rate the extent to which you agree with the following statements. <b><i>I am in favour of the proposed Western Sydney Airport at Badgerys Creek</i></b>						
Disagree (0-3)	12	12	8 ▼	12 ↑	12	11
Neutral (4-6)	28	25	25	25	26	25
<b>Agree (7-10)</b>	<b>54</b>	<b>56</b>	<b>61 ▲</b>	<b>57</b>	<b>56</b>	<b>56</b>
Don't know	6	7	6	6	6	8
Q 10. Using a 0 to 10 scale, where 0 means Strongly Disagree and 10 means Strongly Agree, to what extent do you agree with the following statement? <b><i>Overall, the positive benefits of an airport at Badgerys Creek would outweigh any negative impacts</i></b>						
Disagree (0-3)	11	14	11	11	12	12
Neutral (4-6)	30	30	30	32	32	31
<b>Agree (7-10)</b>	<b>49</b>	<b>49</b>	<b>52</b>	<b>49</b>	<b>48</b>	<b>49</b>
Don't know	10	7 ↓	7	8	8	8

### Residents believe that a new airport is necessary and many remain excited by the prospect.

Two in three residents (66%) continue to believe that Sydney really needs a new airport to support the current airport at Mascot and over half (53%) say they are excited about the proposed airport in Western Sydney as it would bring jobs and improved roads to the region. A minority (28%) is concerned that an airport in the area would compromise living standards. Whilst concerns about living standards were at their highest mid-year, these concerns have softened to align with levels seen during 2014 and end of 2015.

Attitudes towards the proposed airport						
Column %	Benchmark - November 2014 (n=501)	Wave 1 - June 2015 (n=513)	Wave 2 - December 2015 (n=502)	Wave 3 – April 2016 (n=499)	Wave 4 – August 2016 (n=505)	Wave 5 – December 2016 (n=503)
Q 11. What is your level of agreement with the following statements? Showing those who agree 7-10 out of 10						
Sydney really needs a new airport to support the current airport at Mascot	63	64	66	66	66	66
I am excited about the proposed airport in Western Sydney as it would bring jobs and improved roads to the region	56	57	58	54	56	53
I'm worried that an airport in Western Sydney would make it harder to live and work in the area	27	29	28	34 ↑ ▲	34 ▲	28 ↓

Nearly half (48%) feel that the airport should run 24 hours, 7 days a week with around 1 in 5 (19%) who don't think this is necessary.

Importance of a 24 hr airport						
Column %	Benchmark - November 2014 (n=501)	Wave 1 - June 2015 (n=513)	Wave 2 - December 2015 (n=502)	Wave 3 – April 2016 (n=499)	Wave 4 – August 2016 (n=505)	Wave 5 – December 2016 (n=503)
Q101. What is your level of agreement with the following statement - It is important that the proposed Western Sydney airport be open for business and operate 24 hours a day, 7 days a week						
0-3 Not at all important	NA	17	17	20	19	19
4-6		29	24	27	26	24
7-10 Very important		46	51	45	47	48
Don't know		8	8	8	8	9

## 4.2 Sentiment by population groups

**There remains significant variability between sentiment across demographic and geographic groups.**

There is higher advocacy for the proposed airport among males (63% in favour of) and residents aged 55 years old or older (64% in favour of). Sentiment between regions is at comparable levels, however residents in the Inner West are more likely to be undecided as to how they feel towards the airport when compared to the other regions (14% 'don't know' vs average 6%-7% in other regions). However, despite some ambivalence among residents in the Inner West, overall residents in this area, and Sydney's North West, have the highest proportion of those who are strongly in favour of the airport and believe the positive benefits of its development outweigh the negatives (nearly 3 in 5 in both areas). Residents of the South West and West Central regions are slightly less positive overall, however more than 1 in 2 still see the airport in a positive light.

Younger residents (18-34 years) were more likely to be undecided or neutral towards the proposed airport, whilst female opinion was more diverse.

In general, these same patterns are observed when looking at the proportion who believe the positive benefits outweigh negative impacts. Males and those aged 55 years and older (56% and 61% respectively) were most likely to believe the positive benefits outweigh any negative impacts.

Sentiment towards the airport Column %	Wave 5 – December 2016 (n=503)	Male (n=236)	Female (n=267)	18-34 (n=166)	35-54 (n=176)	55+ (n=161)	South West (n=143)	Inner West (n=88)	North West (n=158)	West Central (n=114)
Q 11. In this question we would like to know in more detail how you feel about this proposed airport in Western Sydney. Using a 0 to 10 scale, where 0 means Strongly Disagree and 10 means Strongly Agree, please rate the extent to which you agree with the following statements.										
<b><i>I am in favour of the proposed Western Sydney Airport at Badgerys Creek</i></b>										
Disagree (0-3)	11	9	14	10	10	15	12	5-	12	14
Neutral (4-6)	25	23	26	30+	25	18-	26	23	22	27
Agree (7-10)	56	63+	50-	49-	57	64+	55	58	59	53
Don't know	8	6	10	11+	8	4-	7	14+	6	6
Q 10. Using a 0 to 10 scale, where 0 means Strongly Disagree and 10 means Strongly Agree, to what extent do you agree with the following statement?										
<b><i>Overall, the positive benefits of an airport at Badgerys Creek would outweigh any negative impacts</i></b>										
Disagree (0-3)	12	10	15	12	10	16	12	9	14	13
Neutral (4-6)	31	30	31	42+	30	20-	35	28	27	34
Agree (7-10)	49	56+	42-	35-	51	61+	44	52	54	45
Don't know	8	3-	12+	11	9	3-	9	11	4	8

**As seen previously South West, and now North West, residents are more concerned.**

Those in the South West and North West regions remain the most concerned about potential negative impacts (42% and 40% respectively). As seen in previous waves, Inner West residents are more likely to be unsure of what the negative impact of building the airport would be. Residents of West Central were most likely to be neutral in relation to this issue.

Concerns about the proposed airport Column %	Wave 5 – December 2016 (n=1,000)	Male (n=236)	Female (n=267)	18-34 (n=166)	35-54 (n=176)	55+ (n=161)	South West (n=143)	Inner West (n=88)	North West (n=158)	West Central (n=114)
Q 11. In this question we would like to know in more detail how you feel about this proposed airport in Western Sydney. Using a 0 to 10 scale, where 0 means Strongly Disagree and 10 means Strongly Agree, please rate the extent to which you agree with the following statements. <b><i>I'm concerned about the negative impact building an airport would have on Western Sydney</i></b>										
Disagree (0-3)	25	32+	18-	12-	27	35+	22	27	26	25
Neutral (4-6)	32	28-	37+	38	30	29	30	34	29	39
Agree (7-10)	36	35	37	41	35	33	42	26-	40	31
Don't know	6	5	8	9	7	2-	6	13+	4	5

### 4.3 Perceived benefits

**The perceived benefits of a proposed airport remain steady at the levels seen earlier in the year. Employment and jobs remain the most compelling benefits.**

The most salient benefits for residents are the potential for more jobs (65%), world class infrastructure for global competitiveness (63%), improved travel and logistics for tourism and business (63%) as well as general support for the local economy (59%).

Just under half (45%) believe that the proposed airport would make Western Sydney a better place to live and work. This sentiment has softened from the more positive levels seen in August 2016, with residents in the South West and West Central regions reporting lower levels of agreement with the statement “The proposed airport would make Western Sydney a better place to live and work” (40% in December vs 54% in August for South West; and 44% in December vs 52% in August for West Central).

Perceptions of the proposed airport						
Column %	Benchmark - November 2014 (n=501)	Wave 1 - June 2015 (n=513)	Wave 2 - December 2015 (n=502)	Wave 3 – April 2016 (n=499)	Wave 4 – August 2016 (n=505)	Wave 5 – December 2016 (n=503)
Q 14. What is your level of agreement with the following statements? Showing those who agree 7-10 out of 10						
An airport for Western Sydney would create thousands of jobs - from accountants and gardeners, to drivers, mechanics, and IT	64	63	68	66	64	65
The proposed Western Sydney Airport is important because a city like Sydney needs world class infrastructure to maintain our global competitiveness	63	61	64	61	63	63
The proposed Western Sydney Airport would allow a greater number of people to come and go, which is critical for business and tourism in Western Sydney	61	61	62	60	62	63
The proposed Western Sydney Airport is necessary to support Western Sydney's growing	56	58	60	57	59	59

population and economy						
The road upgrades to support the proposed airport for Western Sydney would improve travel time within the area	56	56	58	54	54	56
The proposed airport would make Western Sydney a better place to live and work	NA	44	49	49	51	45
The proposed airport would make Western Sydney suburbs more desirable (increase in housing values)	43	44	49▲	48	47	48
Badgerys Creek has a relatively small number of residences so there would be a minimal number of residents affected by the noise from an airport compared to other airports	39	40	46▲	39↓	43	42
By around 2050, the proposed airport must have grown to be capable of handling a similar number of passengers as Sydney Airport does today (around 37 million a year) to accommodate the increase in aviation traffic.	NA	NA	NA	NA	NA	46

## 4.4 Concerns

**Around one in three residents remain concerned about negative impacts the airport may cause. This proportion has remained relatively stable since tracking began.**

While only 36% say they are highly concerned, a majority of residents are aware of the potential issues that the new airport may cause. As seen in previous waves, around 3 in 4 (73%) expressed some concerns about the potential impacts – with traffic (both during construction and ongoing once the airport is operational) and noise pollution being the key issues for residents. There has been little change to the types of concerns residents believe to be associated with the development of the airport since tracking began.

As seen previously, while residents can identify potential negative impacts, there has been no significant erosion since the benchmark wave. Residents appear to continue to rationalise the benefits over the negatives.

Concerns about the proposed airport						
Column %	Benchmark - November 2014 (n=501)	Wave 1 - June 2015 (n=513)	Wave 2 - December 2015 (n=502)	Wave 3 – April 2016 (n=499)	Wave 4 – August 2016 (n=505)	Wave 5 – December 2016 (n=503)
Q 11. In this question we would like to know in more detail how you feel about this proposed airport in Western Sydney. Using a 0 to 10 scale, where 0 means Strongly Disagree and 10 means Strongly Agree, please rate the extent to which you agree with the following statements. <b><i>I'm concerned about the negative impact building an airport would have on Western Sydney</i></b>						
Disagree (0-3)	25	22	21	24	23	25
Neutral (4-6)	37	38	41	35 ↓	38	32 ↓
Agree (7-10)	33	36	34	37	35	36
Don't know	5	4	4	4	4	6
Q 15. And how concerned, if at all, are you about the following potential impacts due to the proposed airport in Western Sydney? Showing 7-10 Concerned						
<b>Concerns total</b>	<b>74</b>	<b>76</b>	<b>78</b>	<b>76</b>	<b>77</b>	<b>73</b>
Busier roads because of an airport	55	54	58	58	55	58
Noise pollution once an airport is running	53	56	54	53	56	52
Worse traffic due to road upgrades during the construction phase	55	55	54	53	53	52
Noise at night and early in the morning if an airport was operating 24 hours a day	55	55	51	56	56	53

Environmental impact once an airport is running	49	49	48	48	47	48
Environmental impact from the construction of an airport	48	48	46	47	46	46
Need to close or move public services such as schools / cemeteries	42	43	39	40	40	38
Impact on the desirability of the area (decrease in housing values)	41	42	37	44 ↑	44	38
Pollution for road works / road upgrades	47	45	48	n/a	47	n/a

## 4.5 Knowledge of the proposed airport

The proportion of residents feeling very knowledgeable about the proposed airport has increased in December, to pre August levels.

The proportion feeling they **know a lot** about the proposed airport has increased to levels last seen in December 2015 and April this year. This wave there were slightly fewer residents who said they knew nothing about the airport, however 1 in 3 continue to know little about recent developments (assuming this is something they are interested to know more about).

Q5. How much do you know about the proposed airport?						
Column %	Benchmark - November 2014 (n=501)	Wave 1 - June 2015 (n=513)	Wave 2 - December 2015 (n=502)	Wave 3 - April 2016 (n=499)	Wave 4 - August 2016 (n=505)	Wave 5 - December 2016 (n=503)
0-3 Don't know anything - know nothing about it	35	35	32	36	36	33
4-6	46	44	44	40	45	44
7-10 Very knowledgeable – know a lot about the proposed airport and what is going on	19	21	24▲	24▲	19↓	23

With knowledge of the airport regaining some traction, knowledge of specific activities/areas have also increased to pre August levels. Knowledge of the proposed airport site has returned to approximately 3 in 4 (71%, compared to 66% last wave), and half now claim to know about the proposed road upgrades (50%, compared to 44% last wave). This indicates that government communication initiatives appear to be having some impact on community awareness levels this wave.

Q 12. Which of the following describes what you know about the proposed airport?						
Column % Definitely knew about this / Know something about this but not much	Benchmark - November 2014 (n=501)	Wave 1 - June 2015 (n=513)	Wave 2 - December 2015 (n=502)	Wave 3 - April 2016 (n=499)	Wave 4 - August 2016 (n=505)	Wave 5 - December 2016 (n=503)
The site of the proposed airport is in Western Sydney	73	73	74	73	66↓▼	71
The development of the proposed airport means some residents will be required to move	56	58	57	56	54	55
A number of assessments have shown that Badgerys Creek is the best place for a second Sydney airport	46	48	48	52	43↓	43
Roads will be upgraded / improved to support the proposed Western Sydney Airport	52	51	56	48↓	44▼	50
The government is consulting widely with	37	37	42	37	38	40

local businesses, the community and councils about the proposed airport						
A draft Airport Plan and draft Environmental Impact Statement have been released, providing information on the impacts of the proposed airport at Badgerys Creek	NA	NA	35	35	34	35
Sydney Airport Corporation has the 'right of first refusal' to develop and operate a second Sydney airport	28	27	27	28	26	27
There will be opportunities for community groups and individuals to provide their views about the proposed airport	38	39	39	NA	33	36
The Australian and NSW governments are working together on a Joint Scoping study to determine the rail needs of Western Sydney and the proposed Western Sydney Airport	NA	NA	NA	NA	30	NA
The Australian Government has released the final EIS and the expects the final Airport Plan to be released before the end of the year.	NA	NA	NA	NA	NA	28

Specific knowledge about government consultation is low (40%), as is knowledge of the release of the draft Airport Plan and final Environmental Impact Statement (28%) and 'opportunities for community groups and individuals to provide their views about the proposed airport' (36%). Awareness that Sydney Airport Corporation has the 'right of first refusal' (27%) remains the lowest element measured.

***Despite some improvements, the results indicate that most residents generally are not aware of the specific activities or information releases around the proposed airport.***

#### 4.6 Exposure and recall of communications or initiatives (general)

**Overall communications recall has returned to pre August levels, with recall of media coverage increasing.**

Increases in airport knowledge (after a notable low point in August) are the likely result of increased communications activity from the government being picked up by the news media. Recall of communications significantly increased to 41% in December from 34% in August. However, despite the increase this wave, awareness of news related to the proposed airport is still well below the levels seen in late 2014 (and throughout much of 2015). Among those who can recall communications, there appears to be significantly higher recall of traditional media coverage (64% TV, Radio, Internet news or current affairs). Just over 1 in 4 residents (28%) also say that they are having conversations with people they know.

<b>Q6. In the last 3 months, have you heard / seen / read anything about this proposed airport?</b>						
Column %	Benchmark - November 2014 (n=501)	Wave 1 - June 2015 (n=513)	Wave 2 - December 2015 (n=502)	Wave 3 - April 2016 (n=499)	Wave 4 - August 2016 (n=505)	Wave 5 - December 2016 (n=503)
Yes heard about this	59	53	49▼	43▼	34↓▼	41↑▼
Not heard anything about this	31	37↑	33	41↑▲	51↑▲	45↓▲
Can't remember	10	10	18↑▲	16	15	14
Column n	501	513	502	499	505	503
<b>Q8. Where did you see, read or hear about the proposed airport? (channels) among those who had heard / seen / read anything about this proposed airport</b>						
Media coverage (TV, Radio, Internet news or current affairs)	70	65	67	64	52↓▼	64↑
In private conversations (with people you know)	17	25↑	21	23	28▲	28▲
Newspaper advertising	39	43	22↓▼	18▼	24▼	19▼
In public conversation (other people you don't know)	7	10	7	10	19↑▲	6↓
Social media posts or blogs	8	10	8	13	16▲	13
On the internet (articles but not news)	14	17	14	18	15	18
Through my local council	6	7	11▲	10	13▲	8
From local community groups	6	5	6	8	11	6↓
State Government websites	3	9↑	7	6	8▲	7▲
Direct Mail	1	3	8↑▲	5▲	6▲	4▲

Information provided by my local MP	3	7↑	8	6	4	5
Commonwealth Government websites	3	3	4	5	4	2
Website dedicated to the proposed airport	1	4↑	3	3	4	4
Through attending community forums	2	1	3	1	4	0↓
Information stands at local events	1	2	4▲	4▲	3	2
At an information session	0	0	4↑	1↓	3	3▲
Can't remember	3	2	3	3	3	3
Column n	294	272	246	216	169	206

Those who recall seeing / hearing communications about the proposed airport, about half were likely to attribute it to the NSW Government (52%), whilst about 2 in 5 (43%) thought the communications came from the Australian Government (increasing from last wave). In comparison to the end of 2014, residents were increasingly attributing communications to local councils. A smaller proportion were likely to believe these communications came from neighbourhood groups or local businesses, particularly versus the previous wave.

Q9. So far as you know, where has the information about the proposed airport come from?						
Column %	Benchmark - November 2014 (n=501)	Wave 1 - June 2015 (n=513)	Wave 2 - December 2015 (n=502)	Wave 3 - April 2016 (n=499)	Wave 4 - August 2016 (n=505)	Wave 5 - December 2016 (n=503)
The Australian Government	45	37	43	NA	36▼	43
The NSW Government	52	59	63▲	NA	50	52
Local councils	15	24↑	27▲	NA	28▲	22▲
Neighborhood groups	10	12	18▲	NA	25▲	10↓
Business groups	5	4	7	NA	5	8
Local businesses	2	5↑	5	NA	11▲	5↓▲
Other (specify)	5	3	3	NA	3	2
Can't recall	18	16	10↓	NA	17	16
Column n	294	272	246	NA	169	206

#### 4.7 Prompted recognition of DIRD communications or initiatives

**Overall prompted recognition of DIRD communications and activities has remained stable since August at a relatively low level.**

Just over one in four (26%) residents say they recognised any of the DIRD communication collateral shown to them in the survey, in line with August levels. Local residents continue to be most aware of the airport and infrastructure map (10%), and the announcement of the joint scoping study (10%). Following these communications, 7% have seen or heard about the airport website, have seen draft plans and Environmental Impact statements (6%), fact sheets (6%) or have seen information at local events (5%).

<b>C1. To date, which of these initiatives and communications from the Australian Government have you seen or heard?</b>						
Column %	Benchmark - November 2014 (n=501)	Wave 1 - June 2015 (n=513)	Wave 2 - December 2015 (n=502)	Wave 3 - April 2016 (n=499)	Wave 4 - August 2016 (n=505)	Wave 5 - December 2016 (n=503)
<b>Aware (total)</b>	<b>NA</b>	<b>26</b>	<b>28</b>	<b>32</b>	<b>26↓</b>	<b>26</b>
Western Sydney Airport and infrastructure map		11	14	9 ↓	10	10
Western Sydney Airport website		8	8	7	7	7
Community information stand / Information stand at a local event		8	8	4 ↓	7	5
The announcement of the joint scoping study of rail needs for Western Sydney		NA	NA	7 ↑	7	10
Community update newsletter		10	10	7 ↓	6	5 ↓
Draft Environmental Impact Statement		NA	3 ↑	NA	6	6
Draft Airport plan		NA	NA	5 ↑	6	6
Fact sheets		5	7	8	0	6
Environmental referral		6	6	NA	NA	NA
Preparing for take-off conference		4	3	NA	NA	NA
Information session		NA	2 ↑	NA	NA	NA
Summary pamphlet		NA	3 ↑	9 ↑	NA	NA
Postcard		0	3 ↑	7 ↑	NA	NA
Newspaper advertising		0	8 ↑	7	NA	NA
Poster		NA	3 ↑	3	NA	NA
Out There Summit		NA	NA	3 ↑	NA	NA
Western Sydney Airport information session		NA	NA	5 ↑	NA	NA
None of these		74	72	68	74↓	74

Nearly 2 in 3 residents (62%), say that it is important that they are kept up to date on the progress of the new airport. With more information and media coverage in market at the moment, it is important to keep up the momentum, particularly for those residents who are still neutral or unsure about how the new developments will affect them.

<b>Q13. How important would it be that you're informed about the progress of the proposed Western Sydney Airport at Badgerys Creek?</b>						
Column %	Benchmark - November 2014 (n=501)	Wave 1 - June 2015 (n=513)	Wave 2 - December 2015 (n=502)	Wave 3 - April 2016 (n=499)	Wave 4 - August 2016 (n=505)	Wave 5 - December 2016 (n=503)
0-3 Not at all important	9	7	7	6	8	7
4-6	33	29	31	34	33	31
7-10 Very important	58	64↑	62	60	59	62

With more regular developments for the airport being announced, compared to August more residents say they want to get information about the airport. Whilst traditional media outlets (TV, Radio, Internet news or current affairs) remain the most preferred way for residents to keep up to date about the proposed airport (mentioned by 37%), more residents have said they have a preference to use a dedicated website for the proposed airport (32%, compared to 26% in August), as well as receiving information through newspapers and magazines (29%, compared to 21% in August).

**Residents have expressed interest in a dedicated airport website, however salience of the current website is low (4%). Aim to drive traffic to the dedicated website through channels that have higher salience and where they would prefer to find information, such as through media coverage and newspapers/magazines (online or print versions).**

<b>Q16. Where would you want to get information about the proposed Western Sydney airport?</b>				
Note: Question asked every second wave – Responses with less than 10% in W4 not included in the table				
Column %	Benchmark - November 2014 (n=501)	Wave 1 - June 2015 (n=513)	Wave 4 - August 2016 (n=505)	Wave 5 - December 2016 (n=503)
Media coverage (TV, Radio, Internet news or current affairs)	47	39	34	37▼
Website dedicated to the proposed airport	38	35	26	32↑▼
On the internet (articles but not news)	32	30	25	27
State Government websites	30	27	25	29
Advertising (TV, radio, newspapers etc)	28	27	24	25
Through my local council	28	28	22↓▼	25
Direct Mail	22	22	22	20
Newspapers/ Magazines	38	32	21↓▼	29↑▼
In direct mail / magazines	14	17	16	12↓
Commonwealth Government websites	22	19	14↓▼	18
Social media posts or blogs	12	12	14	13
Information provided by my local MP	16	16	12	12

Don't want any information	9	9	16↑▲	12↓
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#### 4.8 Demand for rail services

Over half believe that trains are necessary from day one of the proposed airport's operation, similar to levels seen 12 months ago.

Many feel rail services need to be in place on the first day that a plane takes off (56% feel it should be). This view has gained some momentum since the last wave, to return to levels seen last December.

<b>Q102. What is your level of agreement with The proposed airport would NOT require a rail/train service from the day the first plane takes off?</b>				
Column %	Wave 2 - December 2015 (n=502)	Wave 3 – April 2016 (n=499)	Wave 4 – August 2016 (n=505)	Wave 5 – December 2016 (n=503)
Agree (7-10) – NOT REQUIRED	19	21	23	18↓
Neutral (4-6)	18	20	21	19
Disagree (0-3) – REQUIRED	57	51	48	56 ↑
Don't know	6	8	8	8

The majority of residents want to see a railway available from day one (69% agree at any cost), that the rail link should connect the proposed airport with the Sydney CBD (77%) and that it should also connect with Western Sydney suburbs (77%).

<b>Q102. What is your level of agreement with the following statements?</b>			
Column % Agree (7-10)	Wave 3 – April 2016 (n=499)	Wave 4 – August 2016 (n=505)	Wave 5 – December 2016 (n=503)
A rail link to the proposed airport should be available from day one of airport operations at any cost	70	NA	69
A rail link should connect the proposed airport with the Sydney CBD	78	NA	77
A rail link should connect the proposed airport with suburbs in Western Sydney	78	NA	77

## 4.9 W5 Conclusions

In terms of overall perceptions and sentiment towards the proposed Western Sydney airport, very little has changed since the last wave conducted in August 2016, or from the levels seen when tracking began late in 2014.

Residents continue to be mostly positive (or neutral) towards the airport with nearly 3 in 5 (56%) in 'favour of the proposed Western Sydney Airport at Badgerys Creek'. Only a minority continue to be strongly opposed (11%). Around half (49%) continue to believe that overall, the positive benefits of an airport at Badgerys Creek would outweigh any negative impacts while around 3 in 10 (31%) have neutral views on this. This still leaves plenty of room for improvement to convert those 'on the fence' to a more positive mindset.

In comparison to earlier in the year, fewer residents are concerned that the proposed airport would impact their standard of living, returning to levels seen in 2014 and 2015. There also remains some differences of opinion by demographic groups, with males and residents aged 55 years or older more strongly supportive of the airport development, while females and younger residents (aged 18-34 years) were more likely to be undecided or neutral towards the proposed airport. Sentiment between regions is at comparable levels, however residents in the Inner West are more likely to hold undecided attitudes towards the airport. Similarly, Inner West residents were less concerned about the negative impact construction would have, a likely result of being further away from the airport site. Residents in the South West and North West continue to be most concerned about the short and longer term impacts of the proposed airport. Compared to August, residents in the South West region were more indecisive about whether the new airport would benefit the area and whether it would in fact improve the standard of living. However, overall resident concerns have remained similar to levels seen in previous waves.

Overall communications recall has returned to pre August levels, with recall of media coverage increasing. Increased salience has helped to increase the amount of knowledge residents claim to have about the proposed airport. Knowledge of the proposed airport site has returned to approximately 3 in 4 and half say they know about the proposed road upgrades. It appears that recent communications from the government are having an impact on awareness and knowledge levels within the community.

Nearly 2 in 3 residents say that it is important that they are kept up to date on the progress of the new airport. With more information and media coverage in market at the moment, it is important to keep up the momentum, particularly for those residents who are still neutral or unsure about how the new developments will affect them. Residents have expressed interest in a dedicated airport website, however salience of the current website is low (4%). Driving traffic to the dedicated website through channels that have higher salience (where residents would prefer to find information), such as through media coverage and newspapers/magazines (online or print versions) is advisable.

Over half now believe that trains are necessary from day one of the proposed airport's operation, similar to levels seen 12 months ago and significantly higher than seen last wave. It appears this component of the issue is gaining momentum again and needs to be closely monitored (and managed) should support for the 'day one' rail concept increase further.

## APPENDIX A: USING THIS RESEARCH

It is important that clients should be aware of the limitations of survey research.

### Qualitative Research

Qualitative research deals with relatively small numbers of respondents and attempts to explore in-depth motivations, attitudes and feelings. This places a considerable interpretative burden on the researcher. For example, often what respondents do not say is as important as what they do. Similarly, body language and tone of voice can be important contributors to understanding respondents' deeper feelings.

Client should therefore recognise:

- that despite the efforts made in recruitment, respondents may not always be totally representative of the target audience concerned
- that findings are interpretative in nature, based on the experience and expertise of the researchers concerned

### Quantitative Research

Even though quantitative research typically deals with larger numbers of respondents, users of survey results should be conscious of the limitations of all sample survey techniques.

Sampling techniques, the level of refusals, and problems with non-contacts all impact on the statistical reliability that can be attached to results.

Similarly quantitative research is often limited in the number of variables it covers, with important variables beyond the scope of the survey.

Hence the results of sample surveys are usually best treated as a means of looking at the relative merits of different approaches as opposed to absolute measures of expected outcomes.

### The Role of Researcher and Client

GfK Australia believes that the researchers' task is not only to present the findings of the research but also to utilise our experience and expertise to interpret these findings for clients and to make our recommendations (based on that interpretation and our knowledge of the market) as to what we believe to be the optimum actions to be taken in the circumstances: indeed this is what we believe clients seek when they hire our services. Such interpretations and recommendations are presented in good faith, but we make no claim to be infallible.

Clients should, therefore, review the findings and recommendations in the light of their own experience and knowledge of the market and base their actions accordingly.

### Quality Control and Data Retention

GfK Australia is a member of the Australian Market and Social Research Organisations (AMSRO) and complies in full with the Market Research Privacy Principles. In addition all researchers at GfK Australia are AMSRS members and are bound by the market research Code of Professional Behaviour.

GfK Australia is an ISO 20252 accredited company and undertakes all research activities in compliance with the ISO 20252 quality assurance standard

Raw data relating to this project shall be kept as per the requirements outlined in the market research Code of Professional Behaviour.

## **APPENDIX B: QUALITY CONTROL AND DATA RETENTION**

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