

# A benchmarking and evaluation research services report

## A GfK Australia report

Prepared for:

The Western Sydney Unit  
Department of Infrastructure and Regional Development

GfK Australia Pty Ltd

Sydney  
L7, 107 Mount Street, North Sydney  
NSW 2060 AUSTRALIA

Tel +61 2 9900 2500  
Fax +61 2 9900 2828

Melbourne  
L4, 126 Wellington Parade  
East Melbourne VIC 3002  
AUSTRALIA

Tel +61 3 8415 9555  
Fax +61 3 8415 9599

[www.gfk.com](http://www.gfk.com)

December 2014

## TABLE OF CONTENTS

	Page
<b>LIST OF FIGURES AND TABLES .....</b>	<b>iii</b>
<b>EXECUTIVE SUMMARY .....</b>	<b>4</b>
<b>1 BACKGROUND AND CONTEXT FOR THE RESEARCH .....</b>	<b>6</b>
<b>2 KEY EVENTS AND ACTIVITIES .....</b>	<b>8</b>
<b>3 THE RESEARCH OBJECTIVES .....</b>	<b>9</b>
3.1 Research objectives .....	9
<b>4 THE RESEARCH APPROACH.....</b>	<b>10</b>
4.1 Overview of approach .....	10
4.2 Considerations relating to timing of research .....	10
<b>5 COMMUNITY RESIDENTS RESEARCH APPROACH .....</b>	<b>11</b>
5.1 Methodology .....	11
5.2 Sample .....	11
5.3 Significance testing .....	11
5.4 Weighting .....	11
<b>6 AWARENESS OF AND KNOWLEDGE REGARDING THE PROPOSED AIRPORT .....</b>	<b>12</b>
6.1 Awareness of the airport .....	12
6.2 Perceived knowledge about the airport .....	14
<b>7 COMMUNICATIONS RELATING TO THE PROPOSED AIRPORT .....</b>	<b>17</b>
7.1 Communication recall .....	17
7.2 Communications / messaging .....	17
7.3 Communication channels .....	18
7.4 Sources of communication .....	19
<b>8 GENERAL ATTITUDES TOWARD CHANGE .....</b>	<b>20</b>
<b>9 ATTITUDES TOWARD THE PROPOSED AIRPORT .....</b>	<b>22</b>
9.1 Overall attitude (in favour / opposition) to the proposed airport .....	22
9.2 Attitudes to and perceptions of the proposed airport .....	23
<b>10 PERCEIVED BENEFITS OF THE AIRPORT.....</b>	<b>26</b>
<b>11 CONCERNS ABOUT THE AIRPORT .....</b>	<b>27</b>
<b>12 THE NEED FOR INFORMATION AND RECOMMENDED CHANNELS .....</b>	<b>28</b>
12.1 Demand for information .....	28
12.2 Western Sydney residents' nominated channels for communication .....	29
<b>13 DEMOGRAPHIC DIFFERENCES .....</b>	<b>30</b>
<b>14 COMMUNITY SEGMENTS .....</b>	<b>33</b>
14.1 Community segments .....	33
14.2 Segment profiles .....	35
<b>15 RESEARCH FINDINGS AND RECOMMENDATIONS.....</b>	<b>37</b>
15.1 Research findings .....	37
15.2 Recommendations .....	38
<b>APPENDIX: USING THIS RESEARCH .....</b>	<b>39</b>

## LIST OF FIGURES AND TABLES

	Page
Table 1: Key events and activities .....	8
Figure 1 : Knowledge about the proposed airport .....	12
Figure 2: Site for the proposed airport.....	13
Figure 3: Degree of knowledge about the proposed airport .....	14
Figure 4: Understanding of the development (Don't know about) .....	15
Figure 5: Understanding of the development (Know about) .....	16
Figure 6: If heard / seen communications about the proposed airport.....	17
Figure 7: Information sources about the proposed airport .....	18
Figure 8: Information sponsors .....	19
Figure 9: Attitudes toward change .....	20
Table 3: Attitudes toward change (vs. Developmental research).....	21
Figure 10: Overall attitude (in favour / opposition) to the proposed airport .....	22
Figure 11: Attitudes or perceptions toward the proposed airport .....	23
Table 4: Attitudes or perceptions toward the proposed airport (vs. Developmental research) .....	24
Figure 12: Overall perception of the proposed airport (positive benefits outweighing negative) .....	25
Figure 13: Perceived benefits of the proposed airport .....	26
Figure 14: Concerns of the proposed airport.....	27
Figure 15: Demand for information.....	28
Figure 16: Recommended information channels .....	29
Table 5: Activities conducted in Western Sydney by demographics .....	30
Table 6: General attitudes to change by demographics .....	31
Table 7: Attitude and perceptions toward the proposed airport by demographics .....	32
Figure 17: Community segmentation.....	33

## EXECUTIVE SUMMARY

### Background and context

On 15 April, 2014, Prime Minister Tony Abbott and Infrastructure Minister Warren Truss announced Federal Cabinet approval of Badgerys Creek as the site of a new airport (the Airport) in Sydney. The Australian Government, through the Western Sydney Infrastructure plan, will invest over \$3 billion over 10 years in major infrastructure upgrades. The plan involves major road and transport linkages to Ensure an airport at Badgerys Creek is connected to the wider transport network. A new airport and the Western Sydney Infrastructure Plan would facilitate the long-term economic development of Western Sydney.

To facilitate consultation with stakeholders and the community, a communications and stakeholder engagement strategy (the Strategy) is currently under development. Elements of the Strategy will be implemented by both the Department and the contracted external communications adviser and although it is yet to be finalised, the Strategy will take a grass roots approach using public relations activities as opposed to mass media advertising.

To monitor and evaluate the effectiveness of the *Strategy's implementation and performance against its objectives* the Department commissioned GfK Australia to conduct a research program to provide both a benchmark and long-term tracking of the activities and to evaluate the Strategy.

### Research methodology

The benchmark quantitative research covered in this report included an online survey with n=501 Western Sydney residents (defined as South West, Inner West, North West, West Central). Fieldwork was conducted 11-17 November 2014. Quotas were set (for age, gender and location) during screening to ensure a representative sample was surveyed. The sample was sourced from online research only panellists.

### Research findings

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. There are significant knowledge gaps in relation to the details of the development (right of first refusal, environmental assessments and opportunity for public consultation). There is however some knowledge about how it might impact residents and infrastructure (residents will need to relocate, road upgrades)

Overall, there is more support for the proposed airport in Western Sydney than there is dissent or questioning and most feel that the benefits would outweigh the negative impact. Western Sydney residents are receptive to change and most support investment in new infrastructure. Most also feel that 'we need to be forward thinking and continually developing' and that 'it is important to build new infrastructure to prosper and be competitive'. Residents do, however, question the likelihood of developments being delivered on time and as promised.

These views were similar to the developmental research outcomes, with some indication of higher likelihood of embracing change and less negativity to the development and its impacts.

Residents believe that the proposed airport would result in economic benefits, in particular benefits associated with improving infrastructure such as road upgrades and growth for the local and national economy. There are however concerns (when prompted) about the impact both during construction and When an airport starts operating (environmental and day to day impacts on noise and traffic/ roads).

There was also concern (but to a lesser extent) about the need for residents or businesses to vacate or relocate.

There is a demand for more information about the development. Ideal channels to communicate information about the proposed airport include media and news (traditional and digital), a dedicated website and state government websites, as well as advertising and through the local council.

The population of Western Sydney can be broadly segmented into four groups based on their advocacy for the proposed airport and level of concern. Two segments (Objectors and Conditional Supporters) who make up around a third of residents and have concerns about the proposed airport and therefore should be a priority for communications.

### **Recommendations**

The research points to a significant need for proactive and pre-emptive communications around the proposed airport, not only to dispel concerns among selected segments in the community but also to keep residents broadly up to date about the progress of this important development. With most residents largely in favour of the proposed airport, communication should focus on promoting the benefits and sensitively address what is being done to mitigate any concerns (environmental management, noise / road impact). The communications should also highlight the opportunities to consult and to engage the community and local stakeholders.

## 1 BACKGROUND AND CONTEXT FOR THE RESEARCH

Since the first commissioned study of Sydney's airport needs in 1946, a second airport for Sydney has been an ongoing proposition to supplement the existing Kingsford Smith Airport to manage significant forecast growth in passenger numbers. For example, between 1985-86 and 2011-12 total passenger movements through Sydney more than tripled - from 9.5 million to 36.0 million<sup>1</sup>. Several locations have been proposed over the years including: Wilton, Holsworthy, Berrima and Badgerys Creek. In 1986, the Hawke Government named Badgerys Creek as the site for a second Sydney airport and began to acquire land. Further land acquisitions were completed in 1989.

Since then the project stalled, with decades of debate over the location and other issues. However, on the April 15, 2014, Prime Minister Tony Abbott and Infrastructure Minister Warren Truss announced Federal Cabinet approval of Badgerys Creek as the site of the new airport (the Airport).

The Australian Government, through the Western Sydney Infrastructure plan, will invest over \$3 billion over 10 years in major infrastructure upgrades. The plan involves major road and transport linkages to ensure Badgerys Creek is connected to the wider transport network. The new airport and the Western Sydney Infrastructure Plan will facilitate the long-term economic development of Western Sydney.

The Government has established the Western Sydney Unit within the Department of Infrastructure and Regional Development to implement the proposed airport for Western Sydney. This Unit will also be responsible for undertaking important consultation with local councils, the community and other stakeholders, including the aviation industry.

### The consultation process

To facilitate consultation with stakeholders and the community, a communications and stakeholder engagement strategy (the Strategy) is currently under development. Elements of the Strategy will be implemented by both the Department and the contracted external communications adviser and although it is yet to be finalised, the Strategy will take a grass roots approach using public relations activities as opposed to mass media advertising.

In essence the Strategy aims to:

- Build strong stakeholder relationships and foster a sense of transparency around key decisions.
  - Communication is to be delivered through a proactive and 'no surprises' approach, to build trust with stakeholders.
- Ensure stakeholders are informed of the latest project news and to leverage 'good news' opportunities.
- Create an accessible and inclusive forum for stakeholder feedback and constructive dialogue.
- Ensure stakeholders are informed of the 'bigger picture' and the benefits if / when a Western Sydney airport becomes operational – not only for Western Sydney, but for the wider NSW and Australian economies.
- Where possible, in the development of project proposals, address stakeholder feedback.
- Anticipate issues that may attract political or media attention, and provide strategies for prompt and proactive management of those issues in a coordinated and professional manner.

<sup>1</sup> Bureau of Infrastructure, Transport and Regional Economics (27 February 2013). "Airport Traffic Data 1985–86 to 2011–12"

It is evident from recent media coverage that among residents and local community organisations feelings continue to be mixed towards this recent announcement. At a meeting organised by Transport for NSW in early August 2014, residents expressed their fears that major transport projects in Western Sydney, including the corridor proposal that will eventually accommodate the M9 Outer Sydney Orbital and Badgerys Creek airport, will require compulsory acquisition of some homes<sup>2</sup>. Others argued that the impact an airport would have minimal impact on the economic development of the area. Philip O'Neill, a Professorial Research Fellow at the University of Western Sydney's Urban Research Centre says hopes for a 'jobs bonanza' triggered by D new airport are unrealistic<sup>3</sup> whilst Qantas CEO Alan Joyce has been reported as saying that the second airport is a vital piece of economic infrastructure for Australia — and Badgerys Creek is clearly the right site<sup>4</sup>.

---

<sup>2</sup> ABC News 8 August 2014

<sup>3</sup> Smh.com.au 13 September 2014

<sup>4</sup> News.com.au 15 April 2014

## 2 KEY EVENTS AND ACTIVITIES

In the weeks immediately prior to conducting this research, a number of announcements and events occurred relating to the proposed airport as summarised in the table below.

**Table 1: Key events and activities**

Date	Description	Channels / Coverage
<b>15 October 2014</b>	Deputy Prime Minister announces that an environmental referral is being prepared to initiate an environmental assessment for the site.	Print/online media coverage. Some metros and local.
<b>26 October 2014</b>	Young engineers competition releases concept designs for the proposed airport	Media coverage included prime time commercial news and metro dailies.
<b>3 November 2014</b>	Advice to tenants about the need to vacate commenced.	Media coverage included prime time commercial news, talk back radio and metro dailies.
<b>5 November 2014</b>	Prime Minister's address a Bradfield Oration supports naming the proposed airport after Bradfield.	<ul style="list-style-type: none"> <li>– "Bradfield Airport" full page cover of Daily Tele.</li> <li>– Widespread media coverage/speculation – particularly around disagreement across government.</li> <li>– Increased correspondence to Government regarding the naming of the proposed airport.</li> </ul>
<b>10 November 2014</b>	Announcement of first projects to receive funding under the Local Roads package.	Print/online media coverage. Some metros and local.



### 3 THE RESEARCH OBJECTIVES

#### 3.1 Research objectives

Given the need for this research to evaluate the Strategy, the research objectives were derived from the overall Strategy objectives. The overriding evaluation research objectives were therefore to assess both the outcome and process, namely:

- a. Evaluate the Strategy's performance on key metrics and impact measures to assess achievement of the communication objectives and 'outcome' of the campaign; and
- b. Provide strategic recommendations for the future Strategy activities (process evaluation).

More specifically the research sought to:

- provide a 2014 benchmark of the Western Sydney community awareness, attitudes, perceptions and benefits relating to the proposed Badgerys Creek Airport development;
- track changes and movement on all benchmarked indices;
- evaluate the communications and activities as a whole to assess their effectiveness in achieving the objectives (cut-through, recall, message take-out and ability to inform and create buy-in for the proposal) including;
  - both at the general community level and by target audiences of interest, including special audiences if necessary;
  - evaluating the performance and return on investment (ROI) of different Strategy elements at an individual and combined level where possible; and
  - identifying potential barriers / drivers to the cut-through or Strategy impact.

The research will provide the Department with; a robust means of determining how the general community and stakeholders perceive the proposed Airport and its impact on the broader community and economy an understanding of which activities are working well, whether any changes are required to messaging or activities, and how to optimise activities to meet the objectives of the Strategy.

More specifically, the research aims to capture the following information:

- Awareness and understanding of the stage of / Government position on the Airport;
- Understanding of what the current activities (communications and delivery) are relating to the Airport and preparation for the Airport;
- Attitudes and perceptions towards an Airport and associated developments (such as road developments) including benefits, drawbacks, concerns;
- Ideal and trusted media and information channels to disseminate information relating to the proposed Airport;
- How these have changed over time (tracking and evaluation research stages);
- Opportunities or avenues to support community and stakeholders, especially those already promoting the proposed Airport and its benefits (such as UWS for example via initiatives such as the recent community forum [http://www.uws.edu.au/newscentre/news\\_centre/more\\_news\\_stories/community\\_forum\\_on\\_badgerys\\_creek\\_airport](http://www.uws.edu.au/newscentre/news_centre/more_news_stories/community_forum_on_badgerys_creek_airport)); and;
- What is working / not working in the communications context and how this can be addressed.

## 4 THE RESEARCH APPROACH

### 4.1 Overview of approach

GfK developed a program involving four waves of online surveys (one benchmark and 3 tracking waves) with a representative sample of the Western Sydney **community** or public. Additionally, there will be 2 workshop sessions with local, regional, state and indeed national **stakeholders** such as: industry groups (e.g. Sydney Business Chamber, Western Sydney Airport Alliance etc.), environment and heritage groups, Western Sydney local government authorities (e.g., WSROC), and others. This will involve inviting representatives from these bodies to attend workshop events. The objectives of these sessions will be to understand participants recall and perceptions of Strategy initiatives and their response to the communications and /or consultations to date.

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 (4 waves)
	GfK to develop draft questionnaire  Cognitive testing (x4) among select demographic and audience groups	Online survey N=500 people aged 18 years and older –10 minutes' duration  Stratified sample with quotas set for age, gender and location representation ~ 30% CALD and n=10 Indigenous ⇒ Topline debrief and report of benchmark findings	Online survey N=500 people aged 18 years and older –12 minutes' duration  Stratified sample with quotas set for age, gender and location representation ~ 30% CALD and n=10 Indigenous ⇒ Topline debrief and summary report of benchmark vs. wave findings
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 benchmark report includes findings from the Quantitative online benchmark survey with community residents.

### 4.2 Considerations relating to timing of research

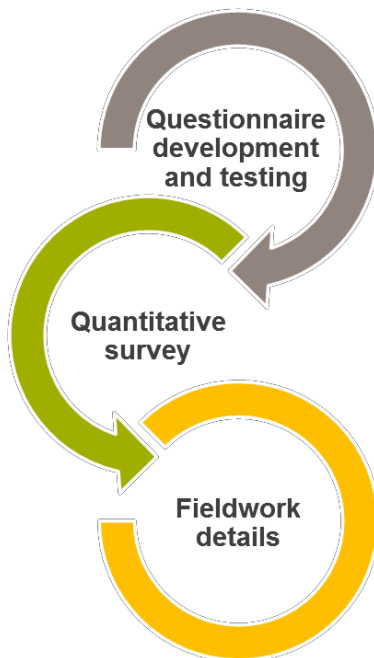
The benchmark research was conducted in the second week of November 2014 shortly following two key events relating to the proposed airport that received media coverage:

- Advice to tenants about the need to vacate commenced (3 November 2014); and
- Prime Minister's address a Bradfield Oration supports naming the proposed airport after Bradfield (5 November 2014).

To assess the impact of these events, some comparisons with the Developmental research conducted in September 2014 have been made in this report to understand how these activities may have impacted community sentiment.

## 5 COMMUNITY RESIDENTS RESEARCH APPROACH

### 5.1 Methodology



- Development of questionnaire – adapting from previous survey
- Benchmark online survey with n=501 Western Sydney residents (defined as South West, Inner West, North West, West Central)
- Quotas set during screening to ensure a representative sample were surveyed for age, gender and location
- Fieldwork conducted from 11-17 November 2014
- Median survey length 11 minutes and 17.9 minutes on average
- Sample sourced from online research only panellists

### 5.2 Sample

The target audience for this research included residents of the Western Sydney region. They were defined as residing in the area within approximately 20 kilometres of the Badgerys Creek site and local government areas included in the region - Liverpool, Penrith, Blacktown, Camden, Campbelltown, Fairfield, Blue Mountains, Bankstown, Holroyd, Parramatta, Auburn, Hawkesbury and Wollondilly. A map was used to indicate the broader locations of South West, Inner West, North West, and West Central).

### 5.3 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 other relevant sub-groups.

### 5.4 Weighting

Data were not weighted for the benchmark wave as it largely reflected the population of Western Sydney and it will be more critical for future waves to match the benchmark sample on age, gender and location.

## 6 AWARENESS OF AND KNOWLEDGE REGARDING THE PROPOSED AIRPORT

### 6.1 Awareness of the airport

**Most Western Sydney residents are aware that an airport has been proposed *and* a site decided on.**

The majority (59%) had heard that a new airport had been proposed and a site had been selected. Only

7% had not heard anything about the airport.

**Figure 1 : Knowledge about the proposed airport**



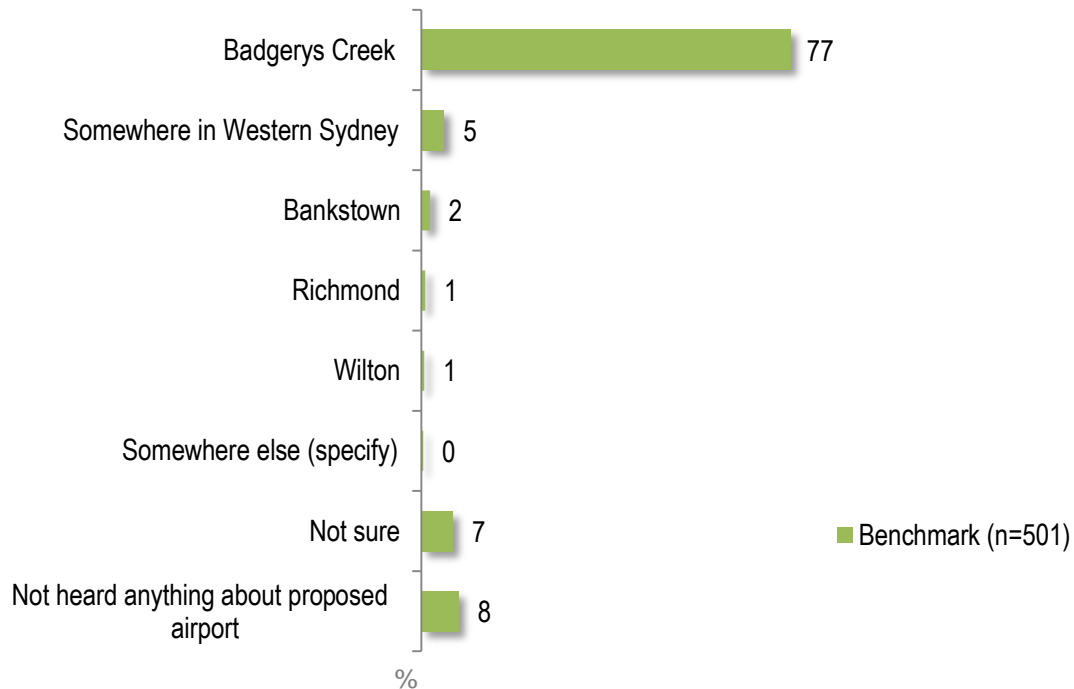
Base: All respondents

Q3. Before today, what (if anything) have you seen / heard / read about the development of a new or second airport in Sydney?

**It is also well known that Badgerys Creek will be the site of the proposed airport.**

More than three quarters of all Western Sydney residents (77%) have now heard about the proposed airport site being Badgerys Creek (84% of those who had heard about the airport to begin with).

**Figure 2: Site for the proposed airport**



Base: All respondents

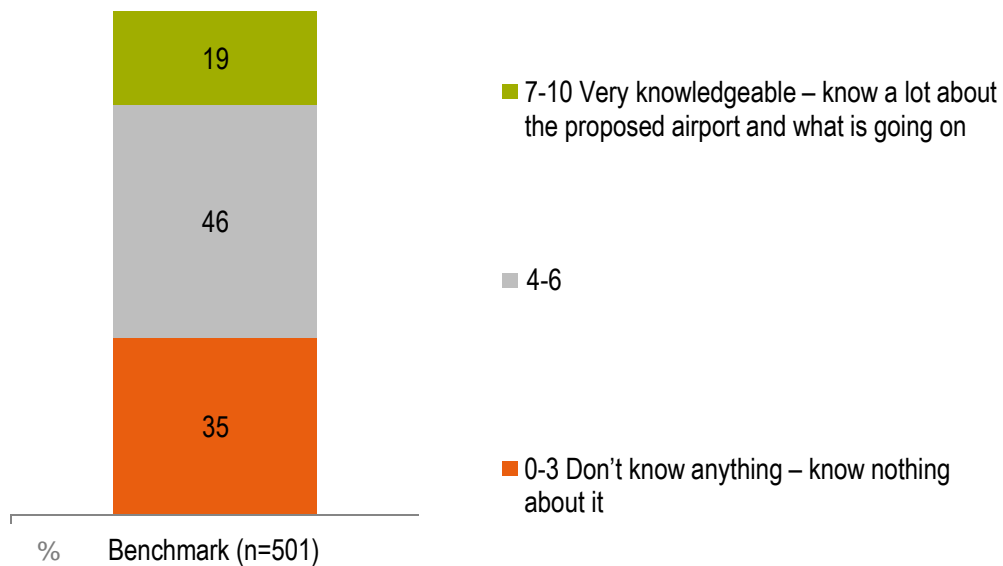
Q4. Do you know where the proposed new airport will be?

## 6.2 Perceived knowledge about the airport

**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.**

Only 1 in 5 (19%) feel they know a lot about the proposed airport with over a third (35%) saying they didn't know anything about it.

**Figure 3: Degree of knowledge about the proposed airport**



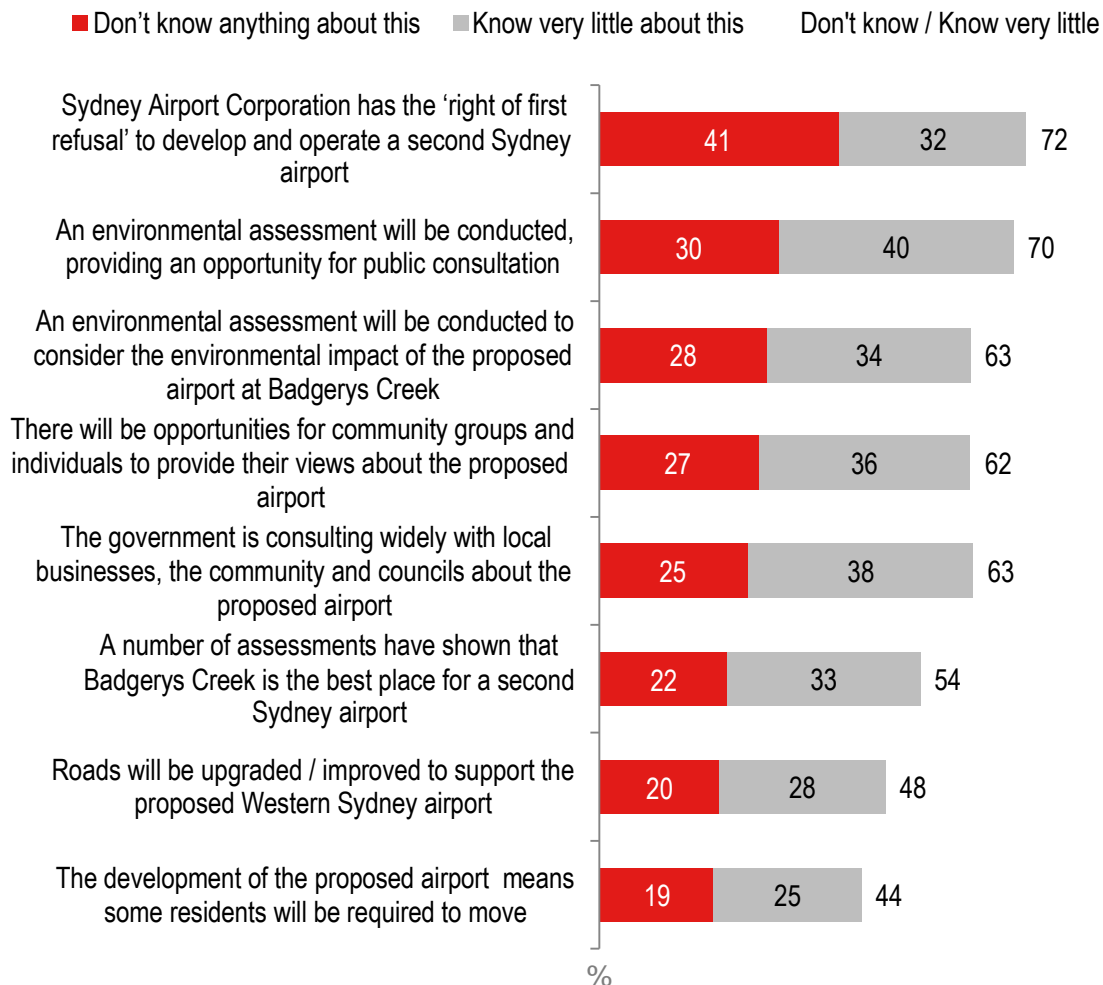
Base: Those aware of the proposed airport

*How much do you know about the proposed airport? Using a 0 to 10 scale, where 0 means Don't know anything and 10 means Very knowledgeable.*

## There are significant knowledge gaps in relation to the details of the development.

There was a lack of awareness about the 'right of first refusal' (72% didn't know much if at all), environmental assessments (70% didn't know much if at all) or that there would be a public consultation process (63% didn't know much if at all).

**Figure 4: Understanding of the development (Don't know about)**



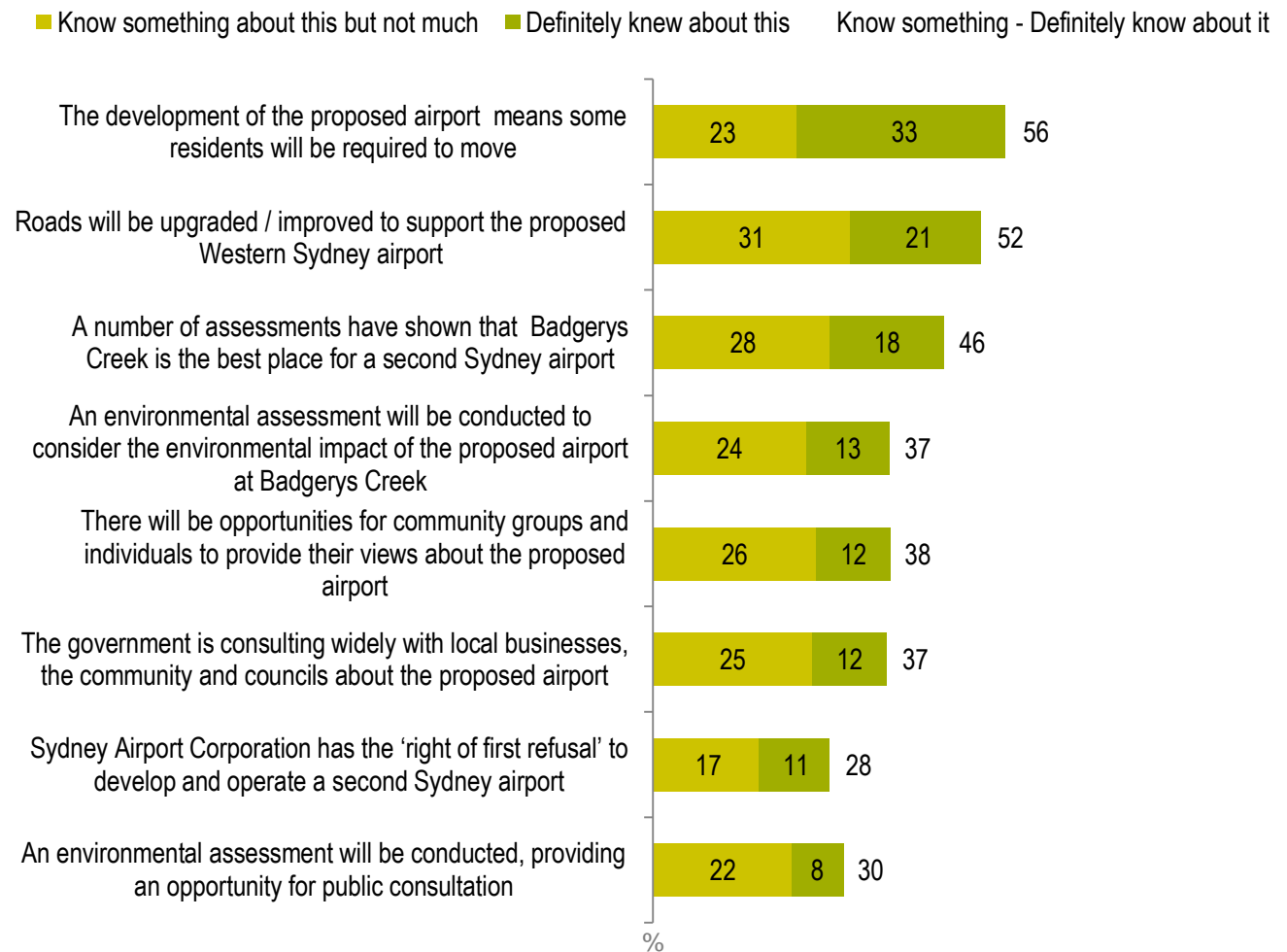
Base: All respondents

Q12. Which of the following describes what you know about the proposed airport?

**There is however some knowledge about how it might impact residents and infrastructure.**

Over half were aware that some people would be forced to relocate (56%) and that there would be upgrades to the roads to support the airport (52%). Nearly half were aware that assessments had been made to identify Badgerys Creek as the best place (46%) and 37% that environmental assessments would be conducted.

**Figure 5: Understanding of the development (Know about)**



Base: All respondents

Q12. Which of the following describes what you know about the proposed airport?



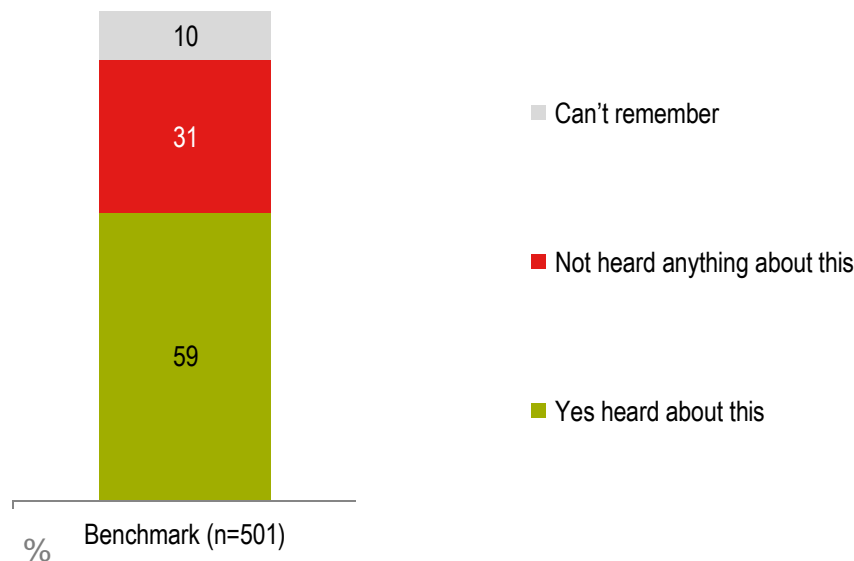
## 7 COMMUNICATIONS RELATING TO THE PROPOSED AIRPORT

### 7.1 Communication recall

**There has been quite a lot of talk around the proposed airport.**

In the last 3 months nearly 6 in 10 (59%) had heard or seen something about the proposed airport with only 31% who had heard nothing about it.

**Figure 6: If heard / seen communications about the proposed airport**



Q6. In the last 3 months, have you heard / seen / read anything about this proposed airport?

### 7.2 Communications / messaging

**Messages about construction starting and residents being given notice to vacate are currently top of mind when Western Sydney residents do think about the proposed airport.**

Open ended mentions around what they'd heard ranged in topic but many had heard about residents being given notice to vacate their properties or being evicted. One in five (22% of these had heard something related to notices being given to vacate (13% total) which was a key activity (the notification to tenants of the need to vacate) shortly preceding the benchmark survey data collection.



Base: All who had heard / seen something about the proposed airport

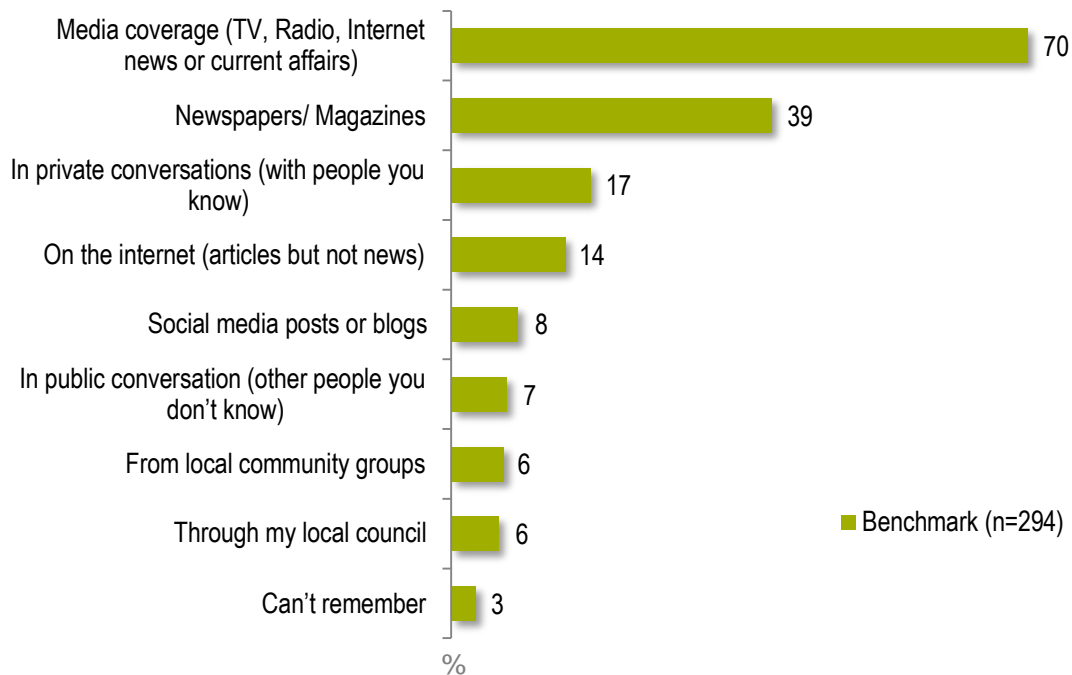
Q7a. What have you seen, read or heard about the proposed airport?

### 7.3 Communication channels

#### Media and news have been the main source of information about the proposed airport.

Recent communications about the proposed airport were mainly through media coverage (70%) as well as in newspapers and magazines (39%).

**Figure 7: Information sources about the proposed airport**



Base: Those who had heard something about the proposed airport in the last 3 months

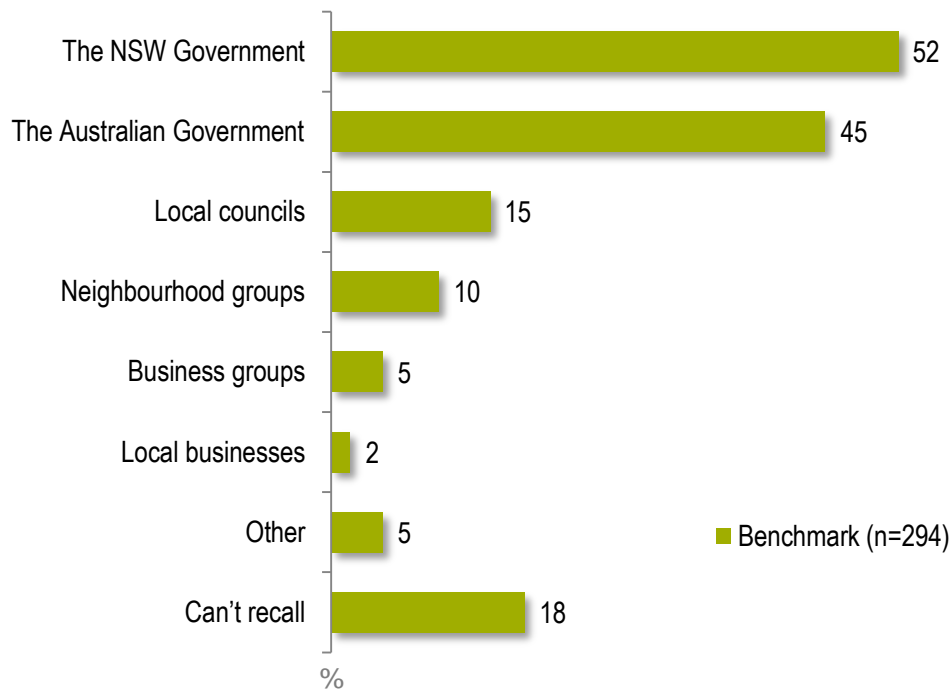
Q8. Where did you see, read or hear about the proposed airport? (channels)

#### 7.4 Sources of communication

**The NSW Government has been seen as the source of recent communications, along with the Australian Government.**

Most believed that information they had heard about the proposed airport was from the NSW Government (52%) or the Australian Government (45%). To a lesser extent, communications were attributed to local efforts - councils (15%), neighborhood groups (10%), business groups or businesses (5%, 2%).

**Figure 8: Information sponsors**



Base: Those who had heard something about the proposed airport in the last 3 months

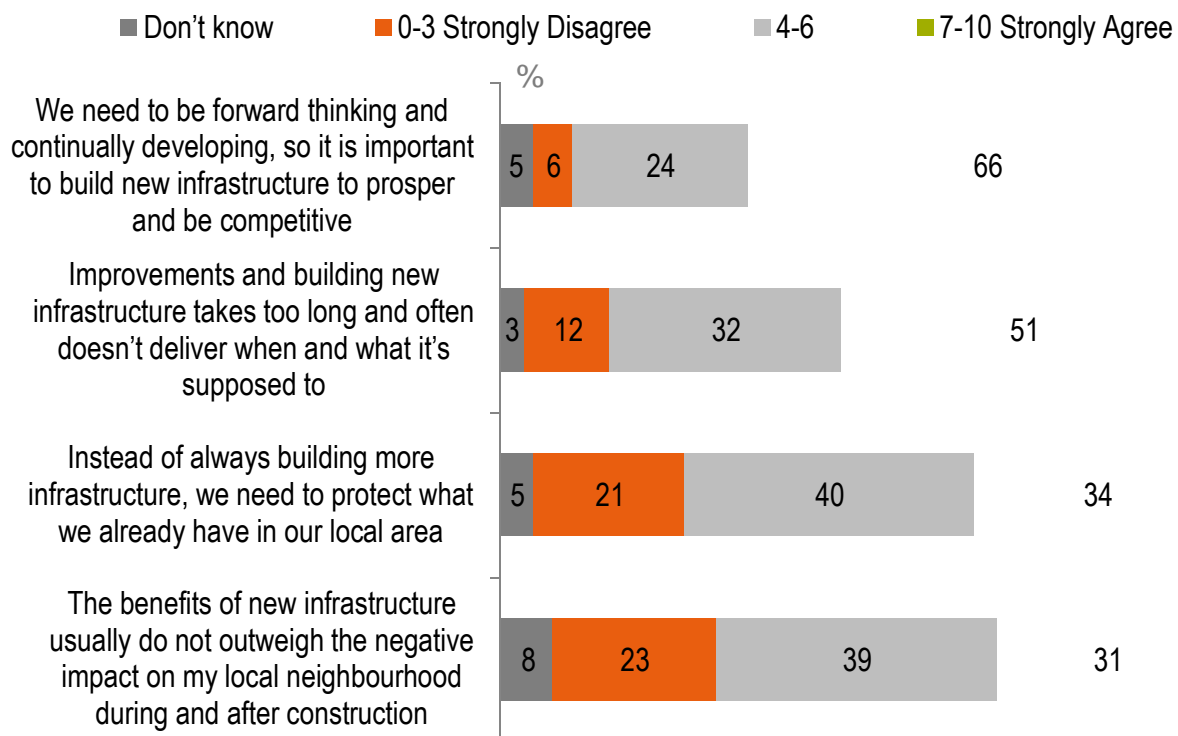
Q9. So far as you know, where has the information about the proposed airport come from?

## 8 GENERAL ATTITUDES TOWARD CHANGE

### Western Sydney residents are receptive to change and most support investment in new infrastructure.

Two thirds (66%) felt that we need to be forward thinking and continually developing and that it is important to build new infrastructure to prosper and be competitive. Half however also felt that this can be a lengthy process that does not deliver when it should (51%) Around a third said that there is a greater need to protect assets in the local area (34%) or that the benefits don't outweigh the negative impacts on the local community (31%).

**Figure 9: Attitudes toward change**



Base: All respondents

A9. Using a 0 to 10 scale, where 0 means Strongly Disagree and 10 means Strongly Agree, please rate the extent to which you agree or disagree with the following statements

These views were similar to those found in the Developmental research, with some indication of higher likelihood of embracing change and less negativity to developments and impacts.

**Table 2: Attitudes toward change (vs. Developmental research)**

Attitudes toward change Average score (0-10 scale)	Developmental research (Sept 2014)	Benchmark (Nov 2014)
*Instead of always building more infrastructure, we need to protect what we already have in our local area	5.9	5.5
We need to be forward thinking and continually developing, so it is important to build new infrastructure to prosper and be competitive	7.9	7.4
+Improvements and building new infrastructure takes too long and often doesn't deliver when and what it's supposed to	7.2	6.5
^The benefits of new infrastructure usually do not outweigh the negative impact on my local neighbourhood during and after construction	5.6	5.3

**Developmental wave wording:**

*\*We don't always have to improve and build new infrastructure - it's important to protect what we have in our local area.*

*+Improvements and building new infrastructure take time and often don't deliver when and what they say they will.*

*^The benefits of new infrastructure are not enough to outweigh the negative impact on my local neighbourhood during and after construction.*

Base: All respondents

A9. Using a 0 to 10 scale, where 0 means Strongly Disagree and 10 means Strongly Agree, please rate the extent to which you agree or disagree with the following statements

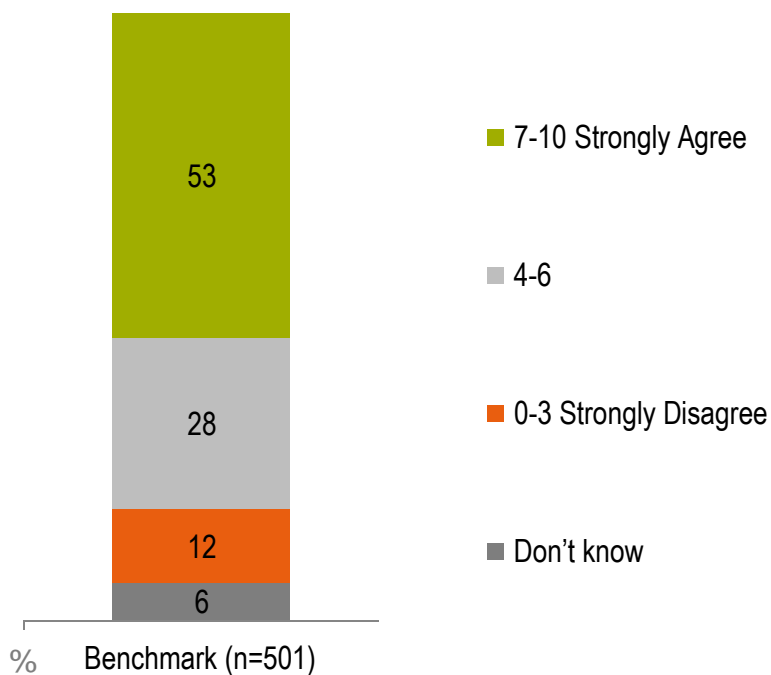
## 9 ATTITUDES TOWARD THE PROPOSED AIRPORT

### 9.1 Overall attitude (in favour / opposition) to the proposed airport

Western Sydney residents are mostly in favour or neutral towards the proposed airport.

Over half of residents were in favour of the proposed airport (53% say they agree / strongly agree that *they* are in favour of and 28% had neutral views). Only a minority (12%) were opposed to the development.

**Figure 10: Overall attitude (in favour / opposition) to the proposed airport**



Base: All respondents

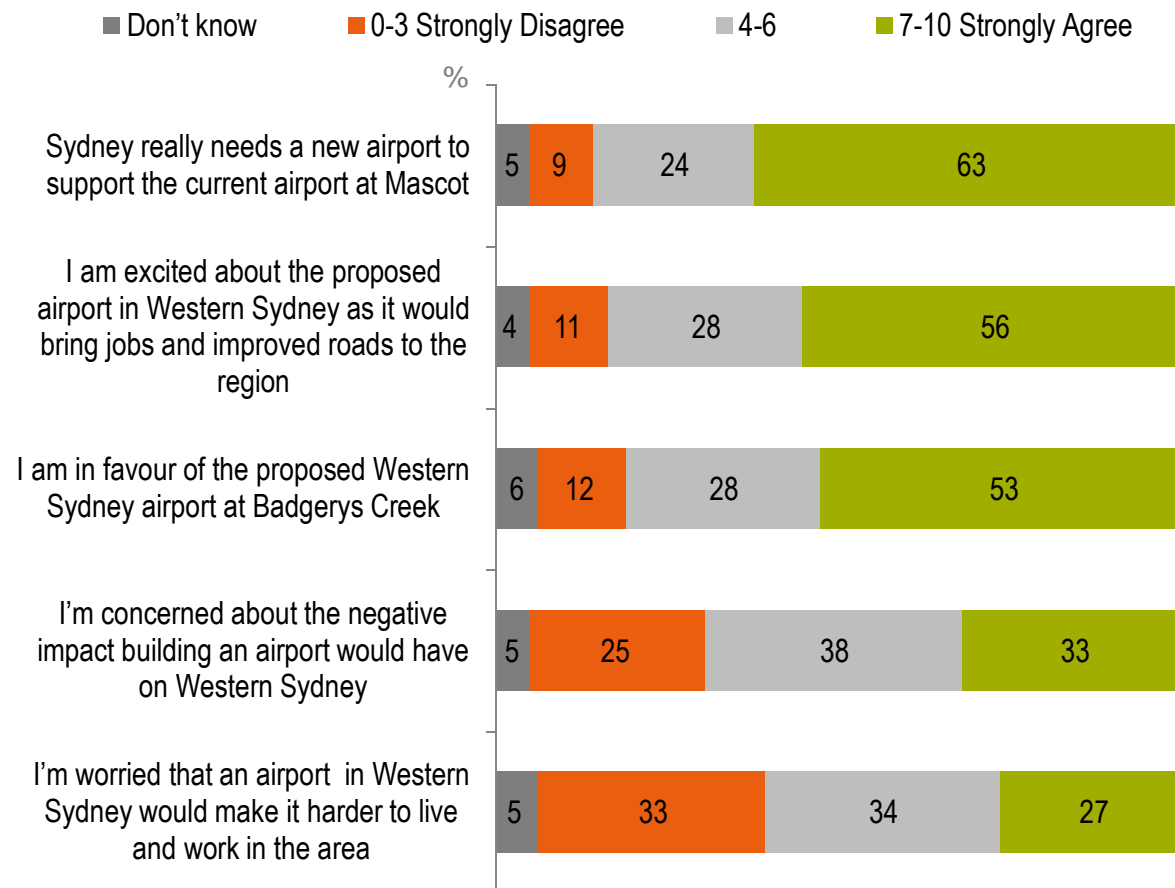
*Q11. In this question we would like to know in more detail how you feel about this proposed airport in Western Sydney. Using a 0 to 10 scale, where 0 means Strongly Disagree and 10 means Strongly Agree, please rate the extent to which you agree with the following statements: I am in favour of the proposed Western Sydney airport at Badgerys Creek.*

## 9.2 Attitudes to and perceptions of the proposed airport

**Overall, there is more support than dissent or questioning for the proposed airport in Western Sydney.**

Most (63%) felt there was a need for a second airport and were excited about the proposed airport (56%). Half (53%) were in favour of the proposed airport at Badgery's Creek. However, a third were concerned about the negative impact (33%) and just over a quarter (27%) were worried it would compromise living conditions in Western Sydney.

**Figure 11: Attitudes or perceptions toward the proposed airport**



Base: All respondents

*Q11. 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:*

There was no marked deterioration in attitudes since September 2014.

**Table 3: Attitudes to or perceptions of the proposed airport (vs. Developmental research)**

Attitudes toward the airport Average score (0-10 scale)	Developmental research (Sept 2014)	Benchmark (Nov 2014)	
I am excited about the proposal to have an airport for Western Sydney	6.1	6.7	<i>Some indication of increasing engagement</i>
I'm concerned about the impact that building an airport would have on Western Sydney	5.9	5.4	<i>Indication of lowering of concerns</i>
I'm worried that an airport would make it harder to live and work in Western Sydney	5.1	4.8	<i>Indication of lowering of concerns</i>

Base: All respondents

*Q11. In this question we would like to know in more detail how you feel about this proposed airport in Western Sydney.*

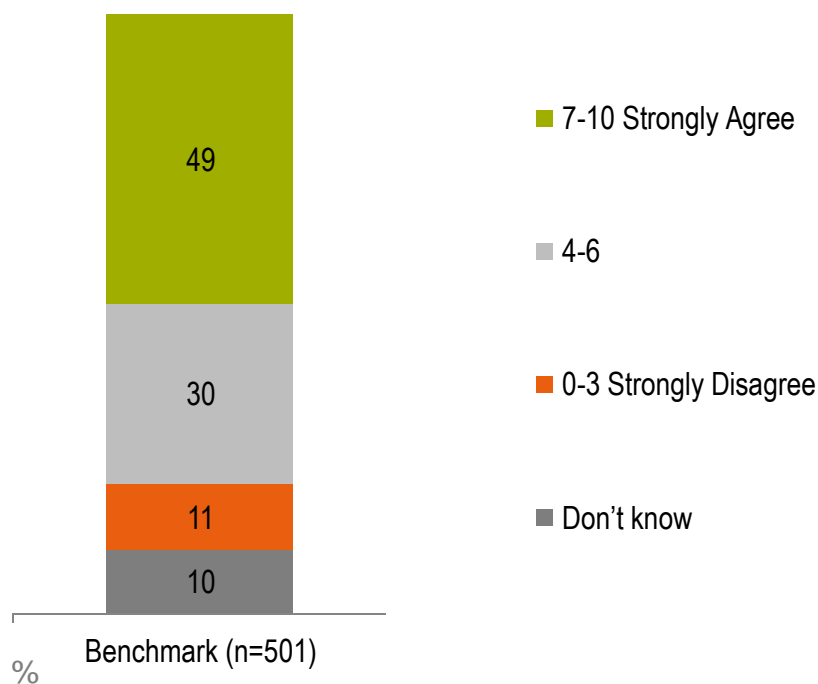


### Overall perception of the proposed airport (positive benefits outweighing negative)

It follows that it is a minority view that the negative impacts of the proposed airport would outweigh the benefits.

Half (49%) believe that overall, the positive benefits of an airport at Badgerys Creek would outweigh any negative impacts with only 11% disagreeing on this point. Around 40% were not sure or felt neutral on the issue.

**Figure 12: Overall perception of the proposed airport (positive benefits outweighing negative)**



Base: All respondents

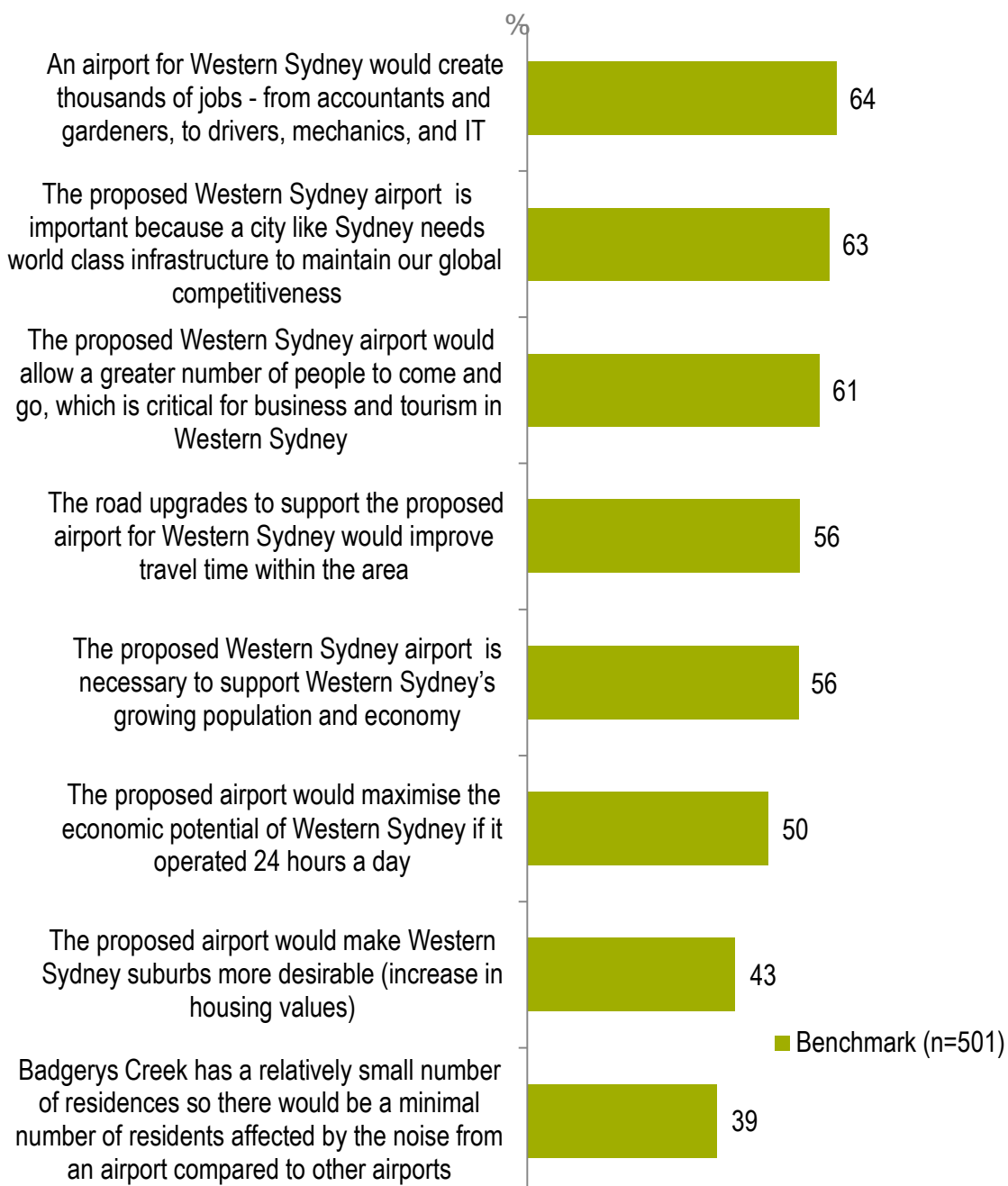
Q10. Using a 0 to 10 scale, where 0 means Strongly Disagree and 10 means Strongly Agree, to what extent do you agree with the following statement?

## 10 PERCIEVED BENEFITS OF THE AIRPORT

### Most agree that the proposed airport would result in economic benefits.

Over half believed the proposed airport would create thousands of new jobs (64%), support the local economy (56%) and improve travel in the area (56%). Many also believed it would add to global competitiveness (63%) and business and tourism (61%). Western Sydney residents were less convinced when it came to the (minimum) number of residents being affected by noise (39% agreed).

**Figure 13: Perceived benefits of the proposed airport**



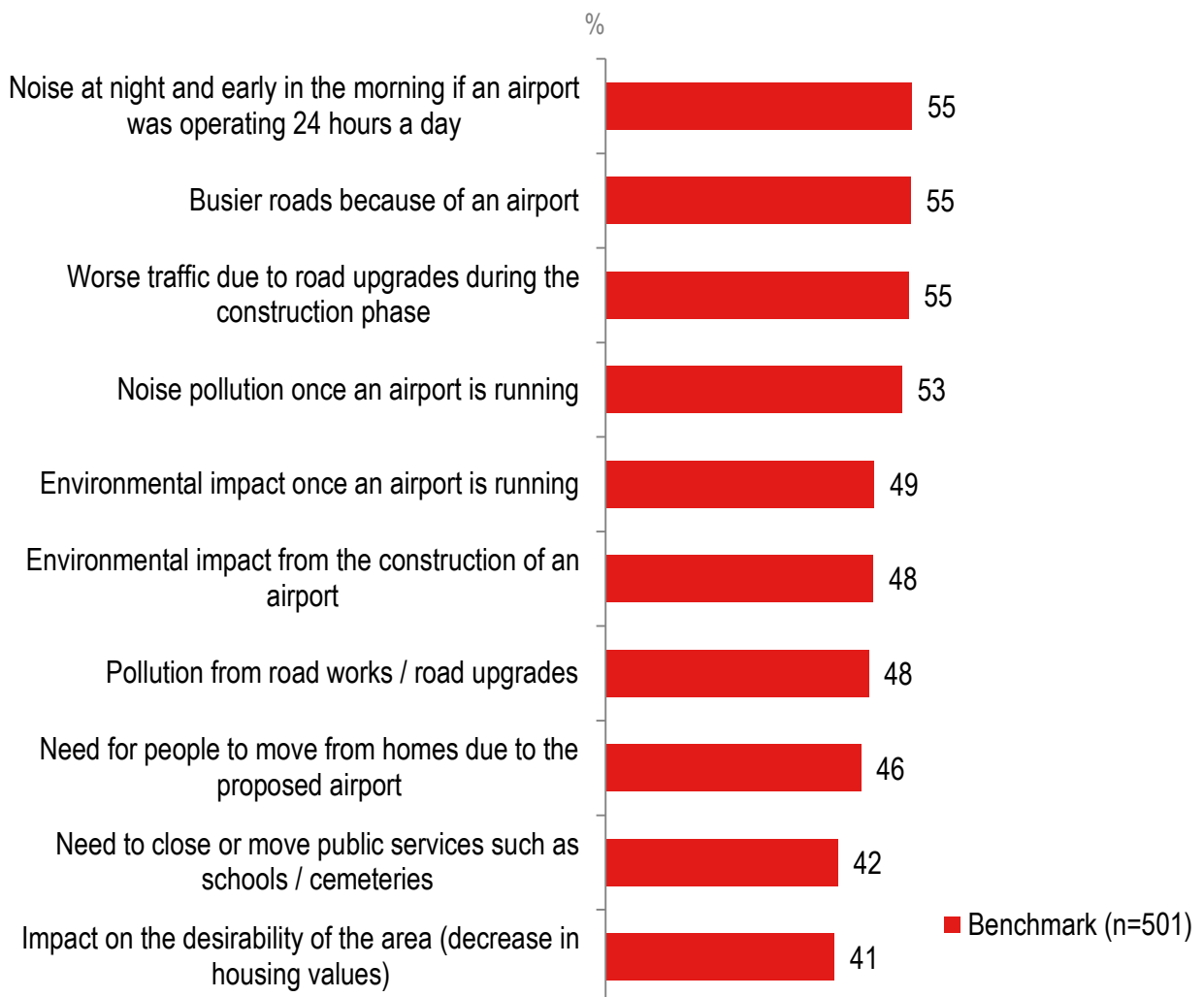
Base: All respondents. Q14. What is your level of agreement with the following statements? 7-10 out of 10 (Strongly agree)

## 11 CONCERNS ABOUT THE AIRPORT

**However there exist concerns (when prompted) about the impact of construction and when the airport starts operating.**

Over half were very concerned about noise (55%), traffic (55%) and the environmental impact (49%) while there was relatively less concern about the need for people / businesses to move or vacate (46%). Some 2 in 5 were also concerned about how this could impact property prices in the area (41%).

**Figure 14: Concerns of the proposed airport**



Base: All respondents

Q15. And how concerned, if at all, are you about the following potential impacts due to the proposed airport in Western Sydney?

## 12 THE NEED FOR INFORMATION AND RECOMMENDED CHANNELS

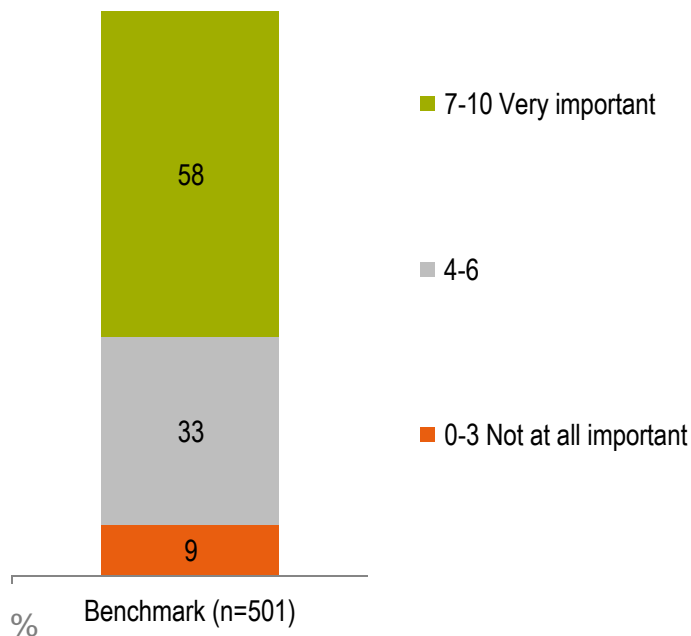
### 12.1 Demand for information

#### There is a demand for more information about the development.

Overall, Western Sydney residents said it is important they are informed about the progress of the proposed airport at Badgerys Creek (58% rated this 7-10, or Very important) with only 9% saying it was not important. A third (33%) was ambivalent about receiving information.

There was a small but notable drop in the level of demand for information since September 2014 - mean score of 6.9 vs. 7.4 in the Developmental research.

**Figure 15: Demand for information**



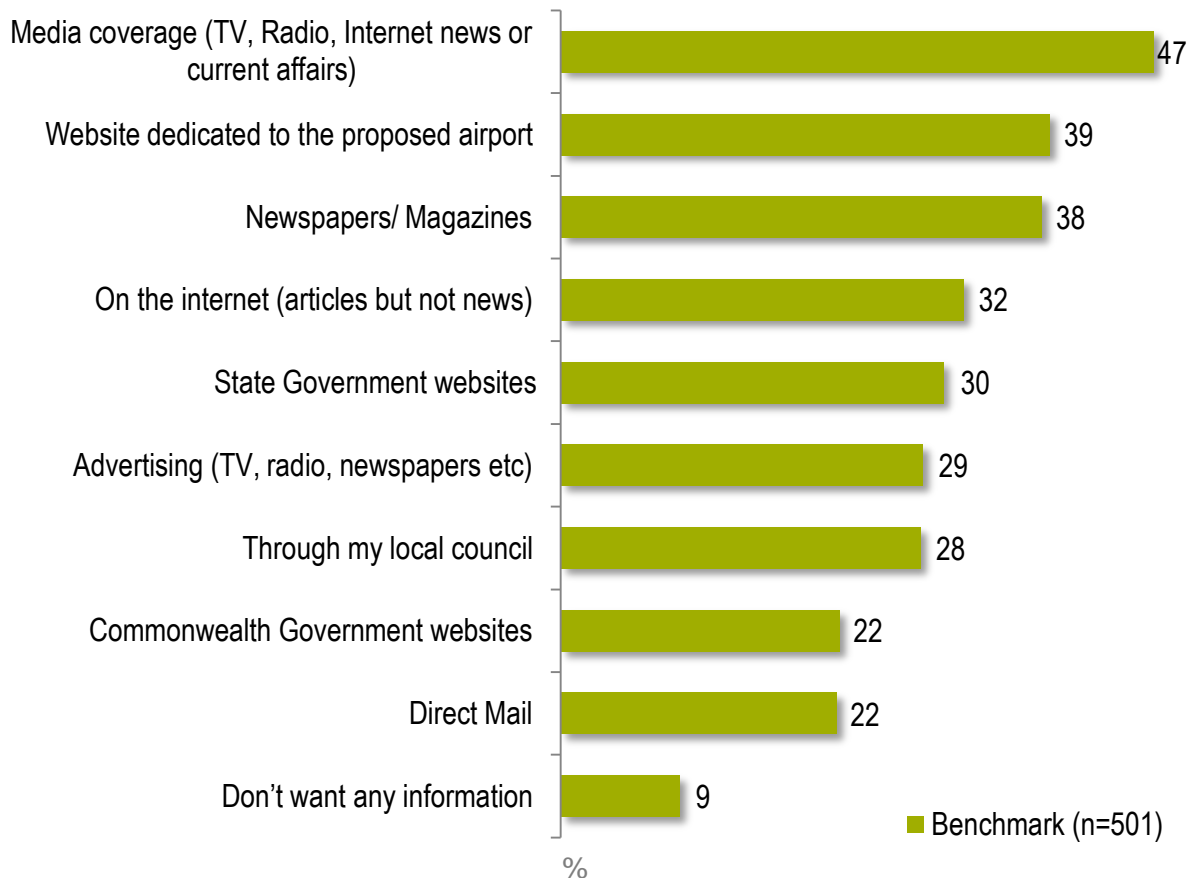
Base: All respondents

Q13. How important would it be that you're informed about the progress of the proposed Western Sydney airport at Badgerys Creek?

## 12.2 Western Sydney residents' nominated channels for communication

Ideal channels to communicate information about the proposed airport include media and news (traditional and digital), a dedicated website and state government websites, as well as advertising and through the local council.

**Figure 16: Recommended information channels**



Base: All respondents

Q16. Where would you want to get information about the proposed Western Sydney airport? Showing top responses (above 20%)

### 13 DEMOGRAPHIC DIFFERENCES

There was some demographic variability in responses to the survey. Those living in West Central were more likely to be travelling to or from Western Sydney by car or public transport. Greater ambivalence towards change was observed among 18-34 year olds which is common for this age group when it comes to community issues while those aged 34-55 years old were more progressively focused. Females were less informed but more concerned and less favourable to the proposed airport. Older residents were even more in favour of the airport.

While not shown in the tables, there was some indication that business owners in the region felt more knowledgeable about the proposal while CALD or those from non-English backgrounds were less knowledgeable.

**Table 4: Activities undertaken in Western Sydney - by demographics**

Column %	Total	Male	Female	18-34	35-54	55+	South West	Inner West	North West	West Central
Lived in Western Sydney for more than 5 years	63	60	66	62	53↓	75↑	69	33↓	62	79↑
Travel by car to or from Western Sydney at least once a week	44	45	43	48	41	43	41	24↓	47	60↑
Take public transport to or from Western Sydney at least once a month	32	34	31	48↑	26	24↓	34	24	27	45↑
Work in Western Sydney	27	27	27	29	30	21	27	16↓	31	31
Run or own a business in Western Sydney	7	10↑	4↓	5	6	10	8	3	9	5
Travel to airport (Mascot) at least every 3 months	16	20	13	16	15	19	17	17	19	11
Travel to airport (Mascot) at least once a month	6	9↑	3↓	9	6	3	8	9	4	4
None of the above	15	14	16	11	21↑	12	10	33↑	16	4↓
Column n	501	250	251	160	184	157	143	90	156	112

Base: All respondents

Q1. Which of the following do you do?

**Table 5: General attitudes to change by demographics**

Column % Strongly agree 7-10	Total	Male	Female	18-34	35-54	55+	South West	Inner West	North West	West Central
Instead of always building more infrastructure, we need to protect what we already have in our local area	34	34	35	30	37	36	35	40	31	33
We need to be forward thinking and continually developing, so it is important to build new infrastructure to prosper and be competitive	66	71	62	53↓	74↑	71	65	60	71	67
Improvements and building new infrastructure takes too long and often doesn't deliver when and what it's supposed to	51	49	52	42↓	53	57	50	47	53	52
The benefits of new infrastructure usually do not outweigh the negative impact on my local neighbourhood during and after construction	31	32	30	26	36	29	27	32	31	33
Column n	501	250	251	160	184	157	143	90	156	112

Base: All respondents

A9. Using a 0 to 10 scale, where 0 means Strongly Disagree and 10 means Strongly Agree, please rate the extent to which you agree or disagree with the following statements

**Table 6: Attitude to and perceptions of the proposed airport - by demographics**

Column % 7-10	Total	Male	Female	18-34	35-54	55+	South West	Inner West	North West	West Central
Very knowledgeable about the proposed airport	19	26↑	12↓	14	17	24	17	18	22	15
Very important to be informed about the progress	58	57	59	44↓	63	66	57	52	61	60
The positive benefits of an airport at Badgerys Creek would outweigh any negative impacts	49	56↑	41↓	38↓	50	58↑	42	47	56	47
I am excited about the proposed airport in Western Sydney as it would bring jobs and improved roads to the region	56	62	51	48↓	58	62	56	57	56	56
I'm concerned about the negative impact building an airport would have on Western Sydney	33	27↓	38↑	36	38	24↓	36	30	30	34
I'm worried that an airport in Western Sydney would make it harder to live and work in the area	27	22↓	32↑	30	28	23	29	24	26	29
Sydney really needs a new airport to support the current airport at Mascot	63	66	60	47↓	65	77↑	59	60	69	63
I am in favour of the proposed Western Sydney airport at Badgerys Creek	53	61↑	46↓	44↓	54	62↑	49	53	59	52
Column n	501	250	251	160	184	157	143	90	156	112

Base: All respondents

Q5. How much do you know about the proposed airport?

Q10. 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?

Q11. In this question we would like to know in more detail how you feel about this proposed airport in Western Sydney.



## 14 COMMUNITY SEGMENTS

### 14.1 Community segments

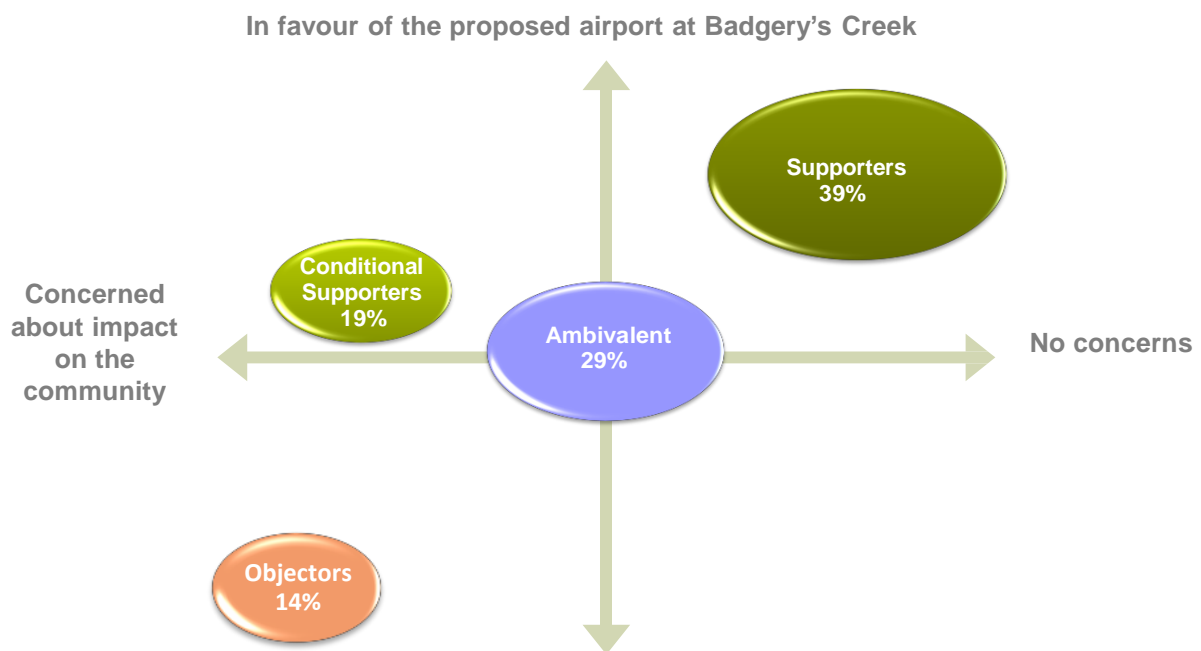
Based on an initial segmentation developed in the Developmental research, GfK generated a basic segment solution based on attitudes toward change and the airport in general.

The segmentation includes four segments based on two variables:

1. Overall disposition towards the proposed airport (in favour vs. opposed); and
2. Level of concern about the impact of the proposed airport.

The largest segment was Supporters making up 39% of Western Sydney residents. There was also a large number of ambivalent residents (Ambivalent segment - that make up 29%). The two segments that require the most attention (in a communication sense) are the Objectors (14%) and Conditional Supporters – as both have concerns about the airport.

**Figure 17: Community segmentation**



Base: All respondents

Based on Q10, Q11 and A9.

Some of the key differences between the segments are summarised below:

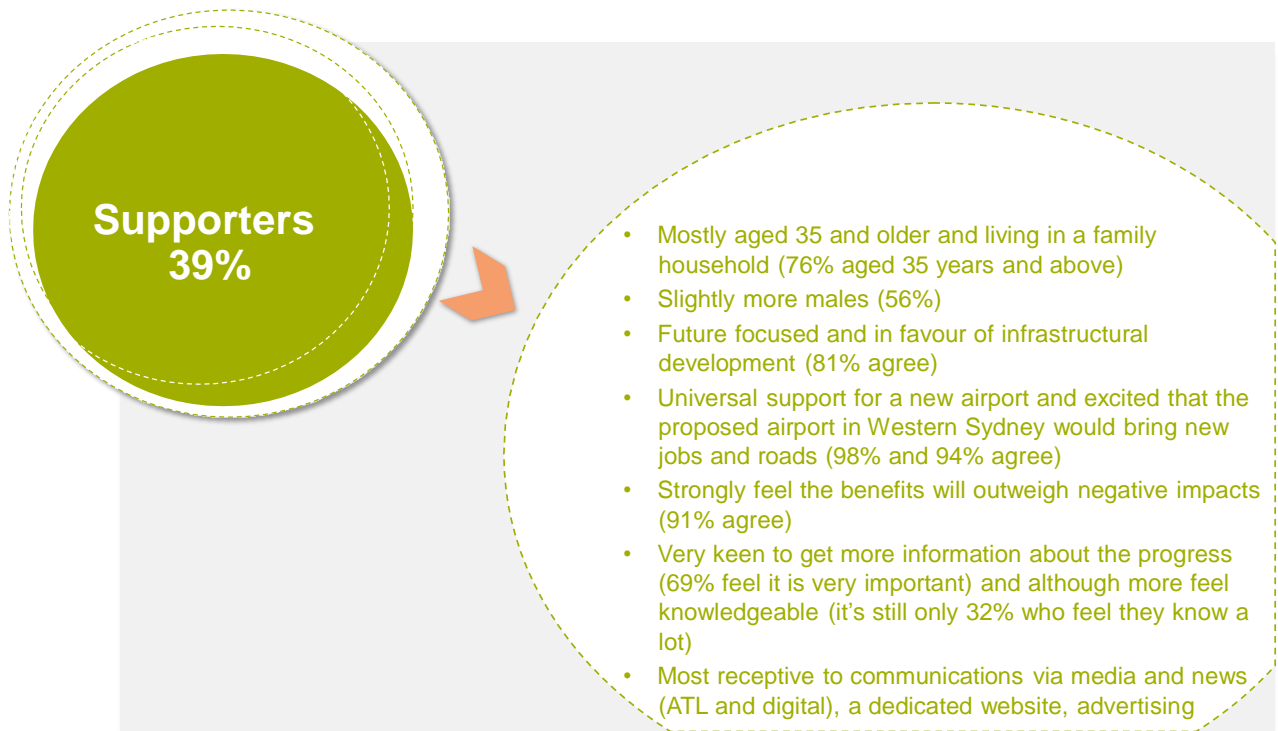
- Supporters tend to be aged 35 and older and living in a family household (76% aged 35 years and above).
- Over half of Ambivalents are younger (55% are 18-34 years old).
- Conditional Supporters are older with nearly half (45%) aged 55 years and above.
- Objectors are even more likely to be long-term Western Sydney residents while Supporters and Conditional Supporters do more car travel.
- Supporters and Conditional Supporters are more future focused while Objectors are more resistant to change.
- Both Conditional Supporters and Objectors are sceptical about the time taken to develop new infrastructure– which is seen to fall short of promises. Supporters are advocates for the proposed airport while Conditional Supporters have mixed feelings.
- Ambivalents are typically neutral while Objectors are opposed and concerned.

Media coverage and news would be most effective in reaching all segments, supported by a website. Objectors would also be highly receptive to communication from local council and from local groups. Conditional Supporters are also favourable to communications from their local MP or Government (state or Commonwealth) websites.

## 14.2 Segment profiles

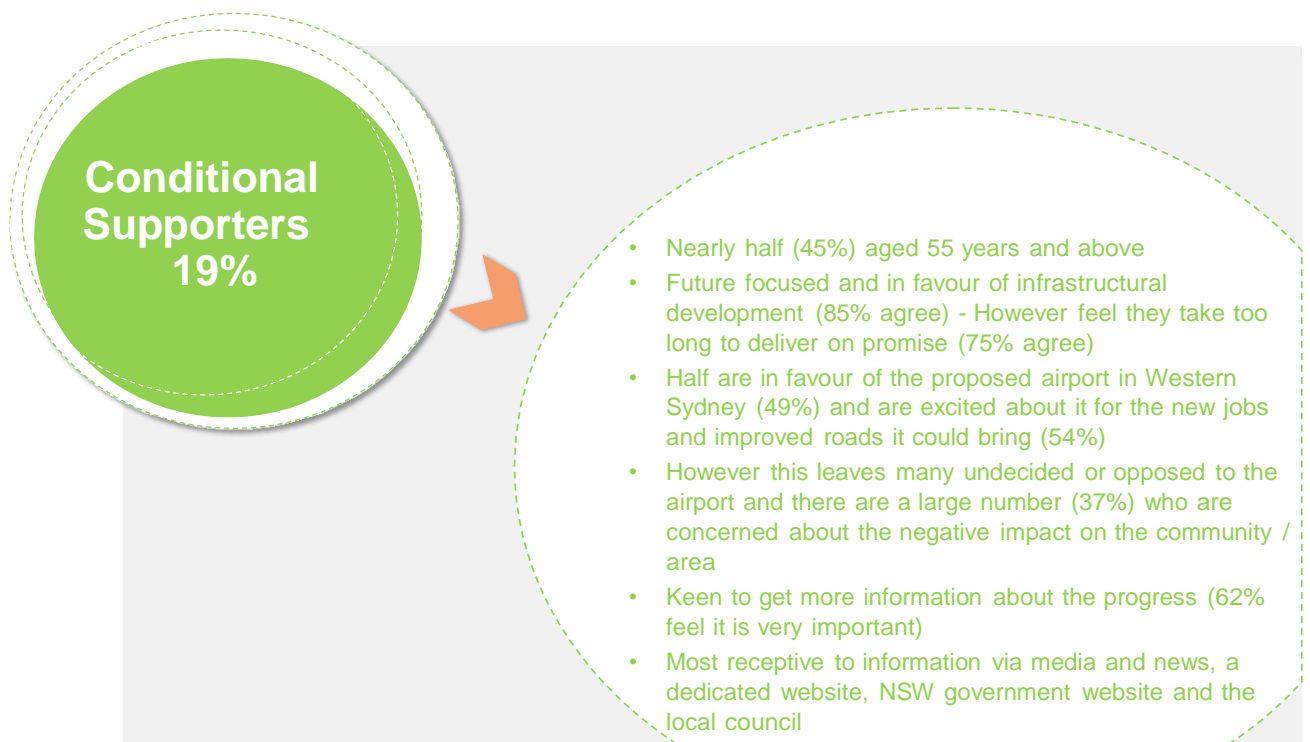
### Supporters

✓ In favour ✓ Few concerns



### Conditional Supporters

✓ In favour ✱ Has concerns



## Ambivalents

Neutral – neither in favour, excited nor concerned



## Objectors

✖ Not in favour ✖ High concerns



## 15 RESEARCH FINDINGS AND RECOMMENDATIONS

### 15.1 Research findings

**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.** Most Western Sydney residents had heard that the airport has been proposed *and* a site decided on (59%). It is also well known that Badgerys Creek *will* be the site of the proposed airport (79%).

That said Western Sydney residents don't believe they know much about the development of the proposed airport (19% felt very knowledgeable). There are significant knowledge gaps in relation to the details of the development (right of first refusal, environmental assessments and opportunity for public consultation). There is however some knowledge about how it might impact residents and infrastructure (residents will need to relocate, road upgrades)

**Overall, there is more support for the proposed airport in Western Sydney than dissent or questioning.**

Western Sydney residents are receptive to change and most support investment in new infrastructure and feel that 'we need to be forward thinking and continually developing' and that 'it is important to build new infrastructure to prosper and be competitive'. However, many also feel that this can be a lengthy process that does not deliver to promises.

Over half of residents are in favour of the proposed airport (53% agree they are in favour of and 28% had neutral views). Only a minority (12%) are opposed to the development. Most (63%) felt the need for a second airport and were excited about the proposed airport (56%). A third were concerned about the negative impact (33%) and 27% were worried it would compromise living conditions in Western Sydney.

**It is a minority view that the negative impacts of the proposed airport would outweigh the benefits.**

Half (49%) believe that overall, the positive benefits of an airport at Badgerys Creek would outweigh any negative impacts with only 11% who disagreed on this point. Around 40% were not sure or felt neutral on this issue.

**Residents believe that the proposed airport would result in economic benefits.**

Over half believed the proposed airport would create thousands of new jobs (64%), support the local economy (56%) and improve travel in the area (56%). Many also believed it would add to global competitiveness (63%) and business and tourism (61%).

They were less convinced that only a minimum number of residents would be affected by noise (39% agreed).

**There are concerns (when prompted) about the impact both during construction and when the airport starts operating.**

Over half were concerned about noise (55%) and traffic (55%), and almost half about the environmental impact (49%) while there was slightly less concern about the need for people / businesses to move or vacate (46%). Some were also concerned about how this could impact property prices in the area (41%).

### **There is a demand for more information about the development.**

Overall, Western Sydney residents said it is important they are informed about the progress of the proposed airport at Badgerys Creek (58%) while only 9% felt it was not important.

Ideal channels to communicate information about the proposed airport include media and news (traditional and digital), a dedicated website and state government websites, as well as advertising and through the local council.

**The market can be broadly segmented into four groups based on their advocacy for the proposed airport and level of concern.** Supporters are already on board with the proposed airport and will likely advocate for the development. Any positive communication will resonate with this group.

Wait and See are a rather disengaged group who are typically younger and are neither in favour nor concerned about the development. Positive communication could help increase their engagement.

**The groups that need the most information are Objectors and Conditional Supporters who hold strong concerns about how the development will affect their community and life.** Conditional Supporters can be convinced with enough evidence that the Government is doing what it can to mitigate risks and impact on residents. Objectors will take more effort and are likely to resist change in general and opt for the status quo.

### **15.2 Recommendations**

With most residents eager to hear more about the proposed airport, there is a big opportunity for further communication (via media, news, websites).

Importantly there should be *proactive* and pre-emptive communications – to avoid any ‘media voids’ which can result in dissenting parties getting there first to fill the absence of news around the proposed airport.

Communications should educate Western Sydney residents and manage their expectations by both ensuring transparency and distributing positive messaging / benefits while also being mindful of local impact/s by providing information about:

- The overall plan for the proposed airport
- The current status and where to go for more information
- Selling benefits of the development (economic, through infrastructure, and impact on the day to day life in Western Sydney) – information about technical details such as the ‘right of first refusal’ is less relevant or impacting on residents so does not need to be a priority.
- How the government plans to minimise / negate outcomes from the construction / development (environmental management / protection, impact on roads, noise, resident displacement)
- Promote the opportunities for a two way dialogue where residents / local interests / stakeholders can provide feedback / concerns (public consultation).

In addition to media, news and a dedicated website, these groups are also receptive to communications from their local council.

## APPENDIX: 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.