



Benchmark and evaluation research: Proposed Western Sydney Airport

**A GfK Australia report
(W4 August 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 4 of the program, with Wave 5 to be conducted towards the end of 2016. This current wave of research also coincided with 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 that coincided with the August 2016 wave of research was also recently completed (with excerpts included in this report). 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 has 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, noting the research may be extended to include additional waves of the community survey.

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 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	Online survey N=500 people aged 18 years and older –15 minutes' duration Stratified sample with quotas set for age, gender and location representation ~ 30% CALD and n=10 Indigenous ➡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 <ul style="list-style-type: none"> Formal report in MS Word Web or teleconference presentation of results 			

This report includes findings from the quantitative online benchmark and first four tracking surveys with community residents and the second stakeholder consultation.

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.

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 W3 findings (April 2016)

While perceptions and sentiment towards the proposed airport remained largely positive in W3, there had been little change over time. DIRD communications continue to fly under the radar – only a minority of residents were aware of specific activities or progress around the proposed airport (such as the draft Airport Plan and draft Environmental Impact Statement).

Only those 'very engaged' with some vested interest in the Western Sydney Airport and its impact (i.e. those in advocacy or community representatives, stakeholders) were likely to be seeking and engaging with DIRD communications. The majority of residents were likely to be reached via mainstream media coverage and announcements.

Fewer had heard or seen updates or communications about the proposed airport generally since November 2014 (the Benchmark wave) which is likely to be the result of lower media coverage (and limited progress of the development activity) rather than DIRD efforts.

It was likely that until more concrete announcements are made or more tangible outcomes come about from the proposed airport, residents will continue to hold largely positive, but also relatively generic knowledge about what the airport could bring. While most are in favour of the proposed airport, less believe the positive benefits outweigh the negative. This points to an opportunity to build further knowledge, but this is likely to require communications about specific and measurable benefits to the community from legitimate sources and stakeholders on mainstream media.

While the current DIRD community activity and information is important to keep residents informed of developments, it needs to be recognised that the typical resident may not be accessing this more technical information. It is more likely that residents will engage with information relating to the development and community specific benefits. When key milestones occur (such as the announcement of an airport operator, physical operations commencing) it will be necessary to use public media to gain attention and coverage.

4 SURVEY FINDINGS

4.1 Sentiment over time

The majority of Western Sydney residents remain positive toward the proposed airport but there is room for more promotion or evidence of the specific benefits to further improve perceptions.

Residents continue to be mostly positive (or neutral) towards the airport with nearly 3 in 5 (56%) who are in 'favour of the proposed Western Sydney Airport at Badgerys Creek'. A minority continue to be 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.

- While few continue to believe the reverse (negative outweighing the positives) there is room to further push the benefits or make these more tangible.

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 last wave, 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)
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. <i>I am in favour of the proposed Western Sydney Airport at Badgerys Creek</i>					
Disagree (0-3)	12	12	8 ▼	12 ↑	12
Neutral (4-6)	28	25	25	25	26
Agree (7-10)	54	56	61 ▲	57	56
Don't know	6	7	6	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? <i>Overall, the positive benefits of an airport at Badgerys Creek would outweigh any negative impacts</i>					
Disagree (0-3)	11	14	11	11	12
Neutral (4-6)	30	30	30	32	32
Agree (7-10)	49	49	52	49	48
Don't know	10	7 ↓	7	8	8

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

Two in three (66%) believe that Sydney really needs a new airport to support the current airport at Mascot and over half (56%) say they are excited about the proposed airport in Western Sydney as it would bring jobs and improved roads to the region. It is a minority (34%) that are concerned that an airport in the area would compromise living standards although interestingly this has increased when compared to the levels seen over 2014 and 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)
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
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
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 ▲

Viewpoints from our qualitative research:

Residents were divided by the positives and negatives of an airport, but it was clear that there was an overall positive feel regarding the proposal. Most believe it will be a positive influence on Western Sydney and something that is long overdue.

The majority of respondents however (whether they were for or against the development) were aware of the need for the airport in terms of the growing population.

“It is inevitable; they couldn't have coped with just one airport. It's the way things happen, we get bigger and you need more facilities.”

Key positive - Jobs

The most positive factor regarding a new airport was seen to be the creation of jobs. This was seen as the whole 'cycle' of jobs, from producing hardware/infrastructure in factories (if in Australia), to building, to jobs at the airport and surrounding developments. It was hugely positive as many are concerned about the lack of jobs in the area (especially given the rising population) and the airport will provide a great variety of jobs for all ages and interests.

Key Negative - Noise

The biggest negative factor of the airport for many is the potential for noise disruption. This is particularly apparent in Penrith and the Blue Mountains. Those in Liverpool, Campbelltown and Parramatta are less concerned for themselves (as they do not believe they will be directly affected but do sympathise for those who may be affected by being close to flight paths). Blue Mountains residents in particular are fearful of noise and pollution.

"We are already hearing planes going over. I think they are trying to get us used to the noise and I don't like it."

Nearly half (47%) 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)
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
4-6		29	24	27	26
7-10 Very important		46	51	45	47
Don't know		8	8	8	8

Viewpoints from our qualitative research:

Planning for 24 hour airport operation

The proposed airport operating for 24 hours a day is both a negative and a positive for residents. Those not directly affected generally believe that it can be a good thing. Sydney is an international city and needs to behave like one, and having a curfew at its only airport is a hindrance.

"It's ridiculous that as an international city we have a curfew – we can't operate in the same way as other international cities!"

4.2 Sentiment by population groups

There is significant variability between sentiment across demographic and geographic groups.

There is higher advocacy for the proposed airport among males (61% in favour of) and residents aged 55 years old or older (65% in favour of). Those in the Inner West were less likely to be in favour of the proposed airport (49% in the Inner West vs. 56% of the broader sample in favour of) and are more likely to hold neutral attitudes when compared to the other regions. Opposition to the airport was relatively comparable across the remaining regions.

Females and younger residents (18-34 years) were more likely to be undecided or neutral towards the proposed airport.

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 (52% and 54% respectively) were most likely to believe the positive benefits outweigh any negative impacts.

Sentiment towards the airport Column %	Wave 4 – August 2016 (n=505)	Male (n=234)	Female (n=271)	18-34 (n=170)	35-54 (n=178)	55+ (n=157)	South West (n=156)	Inner West (n=90)	North West (n=142)	West Central (n=117)
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.										
<i>I am in favour of the proposed Western Sydney Airport at Badgerys Creek</i>										
Disagree (0-3)	12	12	12	8 -	14	13	14	6 -	14	12
Neutral (4-6)	26	24	28	34 +	26	19 ↓	23	35 +	23	27
Agree (7-10)	56	61+	51 -	49 -	54	65 +	57	49	58	56
Don't know	6	3 -	10 +	9	7	3 -	6	11	5	5
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?										
<i>Overall, the positive benefits of an airport at Badgerys Creek would outweigh any negative impacts</i>										
Disagree (0-3)	12	11	13	9	12	16	10	15	15	8
Neutral (4-6)	32	32	31	34	36	24 -	34	29	32	32
Agree (7-10)	48	52 +	43 -	47	43	54	48	42	48	52
Don't know	8	4 -	13 +	9	10	6	9	14 +	5	8

South West residents were also more concerned.

Those in the South West area remain the most concerned about potential negative impacts (39% concerned).

Concerns about the proposed airport Column %	Wave 4 – August 2016 (n=505)	Male (n=234)	Female (n=271)	18-34 (n=170)	35-54 (n=178)	55+ (n=157)	South West (n=156)	Inner West (n=90)	North West (n=142)	West Central (n=117)
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. <i>I'm concerned about the negative impact building an airport would have on Western Sydney</i>										
Disagree (0-3)	23	27 +	18 -	18 -	20 -	31 +	19 -	19 -	28 +	23
Neutral (4-6)	38	38	38	39	39	36	37	45 +	35	37
Agree (7-10)	35	32 -	38 +	37	36	31 -	39 +	30 -	33	36
Don't know	4	3 -	6 +	6	5	3 -	5	6	3 -	4

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 benefit.

The most salient benefits for residents are the potential for more jobs (64%), world class infrastructure for global competitiveness (63%), improved travel and logistics for tourism and business (62%) as well as general support for the local economy (59%).

Over half (51%) believe that the proposed airport would make Western Sydney a better place to live and work.

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)
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
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
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
The proposed Western Sydney Airport is necessary to support Western Sydney's growing population and economy	56	58	60	57	59
The road upgrades to support the proposed airport for Western Sydney would improve travel time within the area	56	56	58	54	54

The proposed airport would make Western Sydney a better place to live and work	NA	44	49	49	51
The proposed airport would make Western Sydney suburbs more desirable (increase in housing values)	43	44	49▲	48	47
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

Viewpoints from our qualitative research:

Messages our focus group participants responded well to

In line with the quantitative results, the two messages that appealed across all groups of residents of Western Sydney pertain to the number and nature of jobs created locally and highlighting local jobs and infrastructure respectively.

Jobs

*'The proposed Western Sydney Airport would **create thousands of jobs closer to where people live** in Western Sydney, including jobs like baggage handlers, ground staff and engineers, and in supporting industries like security, catering, retail, warehousing, administration and IT'*

This message resonates strongly across all Sydney residents, as local jobs are something that Western Sydney residents want and need. They like the fact that the message highlights that **'thousands of jobs will be created'** and that these jobs include a **variety of different jobs** created within and outside the airport itself.

"We need more local jobs, and this tells us we will get them and the kinds of jobs we can get."

Jobs and infrastructure

*The **\$3.6 billion package** of road upgrades surrounding the airport site will improve travel within the area, **relieve pressure** on existing infrastructure and unlock the economic capacity of the region by **slashing travel times** and **creating thousands of local jobs***

This message also received a positive reaction. It is highly appealing and relevant as it talks to both upgrades in infrastructure and local job creation. ‘Thousands of jobs’ sounds like a high number which is appealing. ‘Slashing travel times’ is also a highly appealing message to communicate. Congestion is a major source of frustration for residents living in Western Sydney.

“This is what we were worried about, that there would be no new roads to support the growing population – we people need to hear this.”

“Quicker travel times – that’s what we need!”

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 35% 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 (77%) 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)
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. <i>I'm concerned about the negative impact building an airport would have on Western Sydney</i>					
Disagree (0-3)	25	22	21	24	23
Neutral (4-6)	37	38	41	35 ↓	38
Agree (7-10)	33	36	34	37	35
Don't know	5	4	4	4	4
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					
Concerns total	74	76	78	76	77
Busier roads because of an airport	55	54	58	58	55
Noise pollution once an airport is running	53	56	54	53	56
Worse traffic due to road upgrades during the construction phase	55	55	54	53	53
Noise at night and early in the morning if an airport was operating 24 hours a day	55	55	51	56	56
Environmental impact once an airport is running	49	49	48	48	47

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

4.5 Knowledge of the proposed airport

The proportion of residents feeling very knowledgeable about the proposed airport has declined from the higher levels seen over the past two waves.

The proportion feeling they **know a lot** about the proposed airport has slipped back to the level seen in the benchmark wave over 18 months ago (19%) after the higher figures seen in December '15 and April '16. 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). This wave a higher proportion now say they feel moderately informed about the airport (rising from 40% to 45%) while around one in three continue to feel 'in the dark' about developments.

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)
0-3 Don't know anything - know nothing about it	35	35	32	36	36
4-6	46	44	44	40	45
7-10 Very knowledgeable – know a lot about the proposed airport and what is going on	19	21	24 ▲	24 ▲	19 ↓
Column n	501	513	502	499	505

This decline in general knowledge is also impacting knowledge of specific activities/areas related to the proposed airport. While two in three say they are aware of the proposed site of the airport (66%) this proportion has significantly declined since last wave (73%) and is now at the lowest level measured thus far. Significantly fewer residents also say they are aware that 'Badgerys Creek is the best place for a second Sydney airport' (44% compared to 52% last wave). The proportion knowing that 'roads will be upgraded / improved to support the proposed Western Sydney Airport' (44%) is also down (significantly so when compared to the benchmark wave, 52%).

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)
The site of the proposed airport is in Western Sydney	73	73	74	73	66↓ ▼
The development of the proposed airport means some residents will be required to move	56	58	57	56	54
A number of assessments have shown that Badgerys Creek is the best place for a second Sydney airport	46	48	48	52	43↓
Roads will be upgraded / improved to support the proposed Western Sydney Airport	52	51	56	48↓	44 ▼
The government is consulting widely with local businesses, the community and councils about the proposed airport	37	37	42	37	38
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
Sydney Airport Corporation has the 'right of first refusal' to develop and operate a second Sydney airport	28	27	27	28	26
There will be opportunities for community groups and individuals to provide their views about the proposed airport	38	39	39	NA	33
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
The Australian Government is currently reviewing submissions on the draft Airport Plan and draft Environmental Impact Statement, with a view to finalising these documents in 2016	NA	NA	NA	29	27
Column n	501	513	502	499	505

Specific knowledge about government consultation is low (38%), as is knowledge of the release of the draft Airport Plan and draft Environmental Impact Statement (34%) and 'opportunities for community groups and individuals to provide their views about the proposed airport' (33%). Awareness that of the joint scoping study (30%) and that Sydney Airport Corporation has the 'right of first refusal' (26%) were the lowest elements measured.

This continues to supports the idea that residents generally are not aware of the specific activities or information releases around the proposed airport.

Viewpoints from our qualitative research:

Awareness of the airport project

Whilst respondents were recruited to be aware of the airport, there were variations in knowledge regarding plans and details. The Blue Mountains and Penrith groups did have a couple of respondents who had more knowledge as they felt that they were the most affected by the development. They were more likely to be aware of flight paths and how the airport could affect the area etc.

However, **most Western Sydney residents knew little beyond the fact there was an airport being planned**, and where it was going to be situated.

"I know it's at Badgerys 'cause I drive past and see all the signs."

"They said it was going to be out there a couple of years ago and we haven't heard much since."

They have heard 'gossip' and 'hearsay' about its size, who will be running it, what will be changed in the process, but they know few tangible facts about its planning and what has been done so far. They have also seen some media reports about the airport, but there is little recollection of what this might have been regarding or where they might have seen it. They believe some information would likely have been in the local press but many claim to rarely read these:

"Oh do you mean that blue one that comes about Liverpool – no I never read it!"

4.6 Exposure and recall of communications or initiatives (general)

Overall communications recall has declined further since last wave and is now at the lowest level measured thus far.

Recall of communications continues to gradually decline and is now well below the level seen in the benchmark wave (59%, now down to 34% in August 2016). Among those who can recall communications, there appears to be much lower recall of traditional media coverage (TV Radio, Newspapers) while recall of more informal communications (conversations, social media) have risen. However, these informal elements remain in the minority.

Q6. In the last 3 months, have you heard / seen / read anything about this 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)
Yes heard about this	59	53	49▼	43▼	34↓▼
Not heard anything about this	31	37↑	33	41↑▲	51↑▲
Can't remember	10	10	18↑▲	16	15
Column n	501	513	502	499	505
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					
Media coverage (TV, Radio, Internet news or current affairs)	70	65	67	64	52↓▼
In private conversations (with people you know)	17	25↑	21	23	28▲
Newspaper advertising	39	43	22↓▼	18▼	24▼
In public conversation (other people you don't know)	7	10	7	10	19↑▲
Social media posts or blogs	8	10	8	13	16▲
On the internet (articles but not news)	14	17	14	18	15
Through my local council	6	7	11▲	10	13▲
From local community groups	6	5	6	8	11
State Government websites	3	9↑	7	6	8▲
Direct Mail	1	3	8↑▲	5▲	6▲
Information provided by my local MP	3	7↑	8	6	4
Commonwealth Government websites	3	3	4	5	4

Website dedicated to the proposed airport	1	4↑	3	3	4
Through attending community forums	2	1	3	1	4
Information stands at local events	1	2	4▲	4▲	3
At an information session	0	0	4↑	1↓	3
Can't remember	3	2	3	3	3
Column n	294	272	246	216	169

Those who recall seeing / hearing communications about the proposed airport, were most likely to attribute it to the NSW Government and, increasingly, local councils or neighbourhood groups. A significantly smaller proportion were likely to believe these communications came from the Australian Government when compared to the benchmark wave.

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

Viewpoints from our qualitative research:

Younger respondents claim that they get most of their 'news' from social media and if something important or interesting is happening in their area then that is where they go to find out about it.

People could well have had more communications but do not remember them or did not notice them at the time. One rationale for this is that they are all aware that the airport has been in discussions for over 30 years, so there have been numerous reports and talk about a new airport but little tangible action (as far as they can tell), so they start to 'switch off':

"There has been so much over the years, you get bits of information and then it stops, and then it starts again, so you kind of switch off and pay less attention."

4.7 Prompted recognition of DIRD communications or initiatives

Overall prompted recognition of DIRD communications and activities is also lower this wave.

Now just over one in four (26%) residents say they recognised any of the DIRD communication collateral shown to them in the survey (significantly down from 32% last wave). Local residents continue to be most aware of the airport and infrastructure map (10%), followed by the airport website (7%), information stands at local events (7%) and the announcement of the joint scoping study of rail needs for Western Sydney (7%). Recall of fact sheets are not registering among any residents this wave (0%).

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

Despite the lower stated level of knowledge about the airport and lower recall of media and collateral this wave, there continues to be a desire for information about the proposed airport from the majority of residents (relatively stable at 59%).

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

Traditional media coverage (TV, Radio, Internet news or current affairs) remains the most preferred way residents would like to get information about the proposed airport (mentioned by 34%), followed by various online methods (dedicated airport website, internet articles or state government websites). This wave the proportion of residents who do not want any information has increased in comparison with the benchmark and wave 1 – June 2015 (16% vs. 9% in the benchmark and wave 1).

Q16. Where would you want to get information about the proposed Western Sydney airport?			
Note: Question asked every second wave – Responses with less than 10% in W4 not included in the table			
Column %	Benchmark - November 2014	Wave 1 - June 2015	Wave 4 - August 2016 (n=505)
Media coverage (TV, Radio, Internet news or current affairs)	47	39	34
Website dedicated to the proposed airport	38	35	26
On the internet (articles but not news)	32	30	25
State Government websites	30	27	25
Advertising (TV, radio, newspapers etc)	28	27	24
Through my local council	28	28	22↓ ▼
Direct Mail	22	22	22
Newspapers/ Magazines	38	32	21↓ ▼
In direct mail / magazines	14	17	16
Commonwealth Government websites	22	19	14↓ ▼
Social media posts or blogs	12	12	14
Information provided by my local MP	16	16	12
Don't want any information	9	9	16↑ ▲
Column n	501	513	505

4.8 Demand for rail services

Just under one in two continue to believe that trains are necessary from day one of the proposed airport's operation.

Many feel rail services need to be in place on the first day that a plane takes off (48% feel it should be). However this view has softened moderately since last wave and is now significantly below the level seen in late 2015.

Q103. 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?			
Column %	Wave 2 - December 2015	Wave 3 – April 2016	Wave 4 – August 2016 (n=505)
Agree (7-10) – NOT REQUIRED	19	21	23
Neutral (4-6)	18	20	21
Disagree (0-3) – REQUIRED	57	51	48
Don't know	6	8	8
Column n	502	499	505

Viewpoints from our qualitative research:

It was clear from all groups and communities that the majority of the community believe a rail line is needed for when the airport is operational. They are all concerned about the lack of future planning and they believe that if a rail line is not built for the opening of the airport then this is another area which will not have been planned for appropriately and they will always be playing 'catch up'.

Their expectations of the size and modernity of the new airport drive some of these perceptions. They want the airport to be (and expect it to be) modern, large and better than Kingsford Smith, something the West can be proud of. So therefore, in their minds, a rail link is crucial to this for both practical and emotional reasons:

- It needs to have rail to feel and look like a modern, world class airport

"If this is supposed to be a modern 21st century airport, we will be a laughing stock without rail."

- It needs rail to **service** all the passengers that will be using it

"If it is as big as we think it will be and they are allowing us to believe then surely it needs rail?"

Viewpoints from our qualitative research:

Joint scoping study

In terms of communicating the joint scoping study, Western Sydney residents are happy that a study is being carried out in terms of the need for rail but this message does not make them feel any differently about the need and strong desire for rail. Indeed, carrying out a scoping study is expected of the Government.

The Australian and NSW Governments are undertaking a Joint Scoping study into the rail needs of Western Sydney and the Western Sydney Airport to determine the type of rail services required, when they would be needed, how much they might cost, and which areas they will serve.

4.9 W4 Conclusions

In terms of overall perceptions and sentiment towards the proposed Western Sydney airport, very little has changed since the last 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.

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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