



Benchmark and evaluation research: Proposed Western Sydney Airport

A GfK Australia report

Prepared for:

The Western Sydney Unit
Department of Infrastructure and Regional Development

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1 THE RESEARCH APPROACH

1.1 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 a workshop. The objectives of these sessions will be to understand their 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		
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 <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 tracking surveys with community residents.

1.2 Considerations relating to timing of research

The benchmark research was conducted in the second week of November 2014 shortly following three 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.

1.3 Notes to reading the report

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.

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

Weighting

Wave 1 data was weighted to the Benchmark demographic composition for age, gender and location.

2 COMMUNITY FINDINGS

2.1 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.

2.2 Exposure and recall of communications or initiatives

There has been no significant or even notable change since the benchmark wave in exposure to communications: only 26% recalled seeing or hearing the Department's activities and communications. However there is a need to continue to inform residents about the progress of the proposed airport.

The proportion who had heard anything about the airport in media / advertising has not changed significantly (53% vs. 59% at the benchmark wave). Most continue to attribute what they have heard to the NSW Government and Australian Government, although there has been an increase in the proportion which has heard from 'local councils' on the matter (24% up from 15% at the benchmark wave).

Column %	Bmk - November 2014	W1 - June 2015
Yes heard about this	59	53
Not heard anything nothing about this	31	37
Can't remember	10	10
Column n	501	513
<i>Among those who heard / saw something</i>		
The NSW Government	52	59
The Australian Government	45	37
Local councils	15	24▲
Neighborhood groups	10	12
Business groups	5	4
Local businesses	2	5
Other (specify)	5	3
Can't recall	18	16
Column n	294	272

Q6. In the last 3 months, have you heard / seen / read anything about this proposed airport? by Wave
 Q9. So far as you know, where has the information about the proposed airport come from? by Wave

When prompted with images of the Department's initiatives, only 26% recalled seeing or hearing any of these. This was higher among males (32% vs. 20% of females) as well as among those living in the Inner West region (40%).

The initiatives that residents were most aware of have been the Western Sydney airport and infrastructure map (11%) or the community update newsletter (10%).

With little change in the proportion which has heard or seen anything about the proposed airport, and low recall of the Department's initiatives, it is unlikely that there would be significant change to the attitudes toward the proposed airport (which was even at the benchmark wave, relatively positive).

Column %	W1 - June 2015	Male	Female	18-34	35-54	55+	South West	Inner West	North West	West Central
Any of these (total)	26	32↑	20↓	32	21	26	25	40↑	25	18
Western Sydney airport and infrastructure map	11	13	10	12	5↓	18↑	12	10	14	9
Community update newsletter	10	12	7	12	7	10	10	21↑	6	5
Community information stand	8	10	6	10	6	7	8	13	6	6
Western Sydney airport website	8	10	6	12	4	7	8	14	5	4
Environmental referral	6	8	5	6	6	6	5	10	5	5
Fact sheets	5	5	4	9↑	2	4	5	8	3	3
Preparing for take-off conference	4	7↑	1↓	3	3	6	6	7	2	3
None of these	74	68↓	80↑	68	79	74	75	60↓	75	82
Column n	513	251	262	171	187	155	129	70	163	151

There continues to be a desire for information about the proposed airport with 64% who feel it is important that they be informed about the progress of the proposed Western Sydney airport at Badgerys Creek (indicatively - but not statistically significantly - up from 58% at the benchmark).

Column %	Bmk - November 2014	W1 - June 2015
0-3 Not at all important	9	7
4-6	33	29
7-10 Very important	58	64

2.3 Knowledge about the proposed airport

Knowledge about the proposed airport remains high but unchanged from the benchmark wave.

With the introduction of a new statement *'The government has started planning work towards a proposed new airport in Sydney'* in this first tracking wave, 21% said they knew this about the airport while fewer (37% vs. 59% in the benchmark wave) said they had heard that a site had been selected only. There was no change in the proportion who had heard 'anything' about the proposed airport, remaining almost universal at 92% (vs. 93% at the benchmark wave).

Column %	Bmk - November 2014	W1 - June 2015
Heard something (total)	93	92
The government has started planning work towards a proposed new airport in Sydney	Not asked	21
The government has proposed a new airport in Sydney AND a site / location has been selected	59	37 ▼
The government is considering the development of a new airport in Sydney but no decision has been made	7	7
The government has proposed a new airport in Sydney be built BUT a site / location has not been decided	6	4
Heard some talk but don't really know anything about it	20	22
The government has decided against developing a new airport in Sydney	0	0
Not heard anything about a new airport in Sydney	7	8
Column n	501	513

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

Most who have heard about the proposed airport, correctly believe it will be based in Badgery's Creek – unchanged from the Benchmark wave (80% vs. 84% at the benchmark wave).

Column %	Bmk - November 2014	W1 - June 2015
Badgerys Creek	84	80
Bankstown	2	3
Richmond	1	1
Wilton	1	1
Somewhere in Western Sydney	5	8
Somewhere else (specify)	0	1
Not sure	7	6
Column n	462	471

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

In terms of overall perceived knowledge, there has been no change in the level of knowledge across waves.

Column %	Bmk - November 2014	W1 - June 2015
0-3 Don't know anything - know nothing about it	35	35
4-6	46	44
7-10 Very knowledgeable – know a lot about the proposed airport and what is going on	19	21
Column n	501	513

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

2.4 Attitudes towards the proposed airport

As of June 2015, there has been no change in the largely positive (and neutral) attitudes towards the proposed airport, with support for an airport that operates 24 hours a day, 7 days a week. The proposed airport is seen to carry many positive benefits in supporting the growth of the local economy and infrastructure.

There has been no change to the sentiment towards the proposed airport with 49% who feel that overall, the positive benefits of an airport at Badgerys Creek would outweigh any negative impacts – in line with the benchmark wave (48%). There is no evidence of any change in the proportion who feel that the negative impact would outweigh the positive benefits (14% vs. 11% at the benchmark wave).

Additionally, in terms of the specific benefits (about new jobs, world class infrastructure, supporting population growth etc.) there has been no change since the benchmark wave. On the new measure introduced in Wave 1, 44% agreed that the proposed airport would make Western Sydney a better place to live and work.

Column %	Bmk - November 2014	W1 - June 2015
0-3 Strongly Disagree	11	14
4-6	30	30
7-10 Strongly Agree ... that overall, the positive benefits of an airport at Badgerys Creek would outweigh any negative impacts	48	49
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
The proposed Western Sydney airport is important because a city like Sydney needs world class infrastructure to maintain our global competitiveness	63	61
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
The proposed Western Sydney airport is necessary to support Western Sydney's growing population and economy	56	58
The road upgrades to support the proposed	56	56

Column %	Bmk - November 2014	W1 - June 2015
airport for Western Sydney would improve travel time within the area		
The proposed airport would maximise the economic potential of Western Sydney if it operated 24 hours a day	50	52
The proposed airport would make Western Sydney suburbs more desirable (increase in housing values)	43	44
The proposed airport would make Western Sydney a better place to live and work	Not asked	44
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
Column n	501	513

Q10. Agree with statement - Overall, the positive benefits of an airport at Badgerys Creek would outweigh any negative impacts by Wave. Q14. Do you agree or disagree... 0-10 point scale.

For the new questions added in Wave 1, 46% agreed that it is important that the proposed Western Sydney airport be open for business and operate 24 hours a day, 7 days a week with only 17% who did not feel it was important. The key benefits of this were that a 24 hour operating airport would:

- Create more jobs in Western Sydney
- Make the proposed Western Sydney airport more commercially-viable by allowing NSW to open for business at key times and trade with global partners
- Allow Sydney to compete with Melbourne and Brisbane, delivering more international visitors and imports and exports.

Column %	June 2015
7-10 Very important that the proposed Western Sydney airport be open for business and operate 24 hours a day, 7 days a week	46
4-6	29
0-3 Not at all important	17
Don't know	7
Top 3 statements agree with	
Creates more jobs in Western Sydney	60
Makes the proposed Western Sydney airport more commercially-viable by allowing NSW to open for business at key times and trade with our global partners	47
Allows Sydney to compete with Melbourne and Brisbane, delivering more international visitors and imports and exports	44
Column n	513

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 by Wave
Q102. Which of the following statements do you most agree with (Top 3) by Wave

2.5 Concerns

While sentiment and attitudes toward the airport continues to be positive, residents still do have concerns about the proposed airport, in particular around noise pollution, traffic and potential environmental impact. These concerns remain on par with the benchmark wave. Three quarters of residents (76% in Wave 1 and 74% at the benchmark) have some concerns about the proposed airport.

Column % Agree 7-10 out of 10	Bmk - November 2014	W1 - June 2015
Any of these (total)	74	76
Noise pollution once an airport is running	53	56
Noise at night and early in the morning if an airport was operating 24 hours a day	55	55
Worse traffic due to road upgrades during the construction phase	55	55
Busier roads because of an airport	55	54
Environmental impact once an airport is running	49	49
Environmental impact from the construction of an airport	48	48
Pollution from road works / road upgrades	47	45
Need for people to move from homes due to the proposed airport	46	45
Need to close or move public services such as schools / cemeteries	42	43
Impact on the desirability of the area (decrease in housing values)	41	42
Column n	501	513

2.6 Community Recommendations

While encouragingly, there has been no erosion in positive sentiment towards the proposed airport, there does not appear to be any further improvement and Department's activities have largely gone under the radar. This is not a problem given the largely positive disposition of residents; however, continued communications about the developments and benefits are necessary to keep residents informed and assured during the development. Any communications that can counter (or disprove) concerns or myths could help shift those who are 'on the fence' and alleviate continuing concerns.

3 STAKEHOLDER FINDINGS

The following nine organisations were represented at the first workshop held in Parramatta on 18 June 2015:

- Sydney Business Chamber
- Urban Taskforce
- DHL
- Tourism and Transport Forum
- University of Western Sydney
- WSROC
- Western Sydney Parklands
- Badgerys Creek Airport Taskforce (established by Liverpool Council)
- TAFE NSW

3.1 Benefits and drawbacks of the proposed airport

There was a clear view that the proposed airport would be 'good', especially for Western Sydney. Even those initially opposed to the idea had changed their view and there was a view also that the community had become more accepting and supportive of the idea. The economic benefit was the primary driver of positive attitudes, especially in the context of high unemployment among youth in Western Sydney.

The only concern was that government was not planning 'big enough' and that the airport could 'turn into another Avalon' – a freight-port only. The hope is that this will be an airport with an international capacity, future-proof, and something of which Western Sydney can be proud.

Stakeholders were uniformly excited about an 'aerotropolis' concept and the many opportunities this would provide for the people of Western Sydney. The fear is that ownership of the airport by the Macquarie Airports Corporation (MAC) may lead to a limit in its capacity and/or size as the corporation seeks to maximise use of its current Kingsford Smith Airport asset.

The main issue with the project to date for stakeholders is **what will happen and when?** These timing issues are what they are grappling with and feel they cannot get any clear answers on from the Department or indeed anyone. Even if 'fluid' timelines or a range of dates is provided, they would like greater certainty around the process and the future of the project. Two important issues they would like early timing clarification around are:

- Runway finalisation, because its finalisation and the timing of this decision is important for most, especially local residents; and
- The end point / cut off for MAC deciding whether to take up the option.
- Councils are awaiting the release of the Environmental Impact Statement (EIS) and indicate this may sway their view on the airport, pending its outcomes. On this, there was also a popular call to extend the exhibition period for the EIS to 90 days from the currently planned (or assumed) 60 days.

3.2 Awareness and Communications - unprompted

When asked what communications about the proposed airport they had heard or seen that came from the Australian Government, stakeholders insisted that they 'had not seen or heard anything'. Many of the communications were misattributed to the NSW Government, though some did say that they often received emails/information from 'Kim', referring to the Australian Government contact.

There was **no awareness of the dedicated Australian Government website** and they were all asking for one – a site that covered all topics of interest and was fully up to date with the latest information.

In the absence of this information from the government, myths and misinformation arise to fill the gap about what is happening, when decisions will be made about the number and direction of runways or hours of operation, size of the airport, etc. This is an oft talked about issue, rife with gossip and myths in the western suburbs of Sydney.

The view is that the information is available 'here and there' but is not being pushed to you by the Australian Government or anyone and it's more that they have to consciously search and look for it.

The one community representative felt quite the opposite, however, saying that there was far too much information from 'government' and that it should be more streamlined and focused on **updates only** instead of repeating previously released information. Even from this more involved stakeholder, there was considerable confusion with different levels of government and which one was sending the information to the organisation.

The volume of information was also seen as sometimes unintentionally 'hiding' important information around the consultation/information sessions for example.

This indicates the importance of highlighting:

- new information in any updates that do go out,
- the Australian Government branding; and
- the opportunities for face-to-face information sessions.
 - The latter are seen as particularly important for the community to know about and more of these are requested by community-based stakeholders.

Rather than a 'maze' of links, stakeholders feel it is better to have only one per email so it's more focused and simpler to follow and pass onto others. (Communications from NorthWest Rail Link are said to be a good example of how to keep stakeholders informed and up to date.)

Ideally, stakeholders would like different levels of government to talk to one another and coordinate how and when information is communicated to them about the proposed airport. While stakeholders realise this is unlikely, it would be their ideal model. That is, they would love some clarity around the lines of responsibility – who is responsible for what aspect of the proposed airport (Federal vs. State) and who is communicating what – i.e., coordinated communications. The stakeholder view is that this is something the State government should lead given that it is 'closer to the ground' – that is, more closely aligned with impact on jobs, transport and local issues.

3.3 Awareness and Communications - prompted

- Community information stand/s – there was no awareness at all
- Community update newsletters – just the community representative was aware of this (March and June editions only)
- Western Sydney airport website – no awareness at all
- Environmental referral – widespread awareness an EOI was pending
- Fact sheets – no awareness at all
- Western Sydney airport and infrastructure map – very limited awareness and where encountered (at Liverpool Council Chambers) a request was made for a \$100 payment to receive a copy of the map
- Deputy Prime Minister's address to the "Preparing for take-off conference" - there was widespread awareness of the conference and some resentment that not all key stakeholders were invited.

3.4 Future communications – needs and preferences

A number of clear requirements around future communications from the Australian Government were voiced both directly and indirectly during the stakeholder workshop:

- Information on the timing of decisions or at least broad timeframes – what will happen when?
- This is especially around runway location, airport flight capacity and capacity for retail and freight operators.
- A need for clear and frequent promotion of the Western Sydney airport website.
- Promotion of the Community Update Newsletter – its availability and content.
- An 'overview document' of progress in decision making around the proposed airport, updated as necessary and ideally presented in a graphic/tabular form so it was easy to follow and pass onto others.
- The need to ensure that more than one stakeholder per organisation is informed about developments /updates / changes / newsletters
 - this is to take into account the often chaotic nature of internal communications, as well as staff absences and turnover within stakeholder organisations.

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.