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1 Introduction

The approach to communications and stakeholder engagement in the Inland Rail Communications Strategy has been informed by the results of a comprehensive research program undertaken between March and May 2018. The research was undertaken to obtain an understanding of the characteristics of communities along the corridor and set a baseline of existing levels of awareness, understanding and attitudes towards Inland Rail among the Australian public and key stakeholders.

The research findings provide guidance on how the communication concepts can be applied, and insights into general public communication preferences and the suitability of geographic audience segmentation. The research has helped to inform the selection of approaches and tools in the Inland Rail Communications Strategy and is a source of evidence to draw on when developing specific communications activities.

The focus of the research was to test existing levels of awareness, attitudes and values relating to the Inland Rail project among known stakeholder groups and the broader public. Specifically, we sought to understand:

» **What people know about Inland Rail now**

- A. What are their perceptions and misperceptions?
- B. What else do they want to know (e.g. number and types of jobs it will generate, number of trucks off roads, planned and potential future rail connections)?

» **What people think about Inland Rail**

- A. Is the project regarded as being good, bad or are people indifferent towards it?
- B. What do they see as its potential benefits or concerns – for them as individuals, businesses and for their communities (e.g. economic, social and health, environmental)?
- C. What does the community/industry expect from the Australian Government in relation to Inland Rail? Which benefits do they see as being most important?

» **Which messages work best to build understanding and address misperceptions about Inland Rail**

- A. What are the opportunities for communications to build trust and support for the project along the alignment, in Victoria, NSW and Queensland, and among Australians more broadly?
- B. What are the important story opportunities and angle that can be told about this national infrastructure project?
- C. Who are the right people to tell them, and how?

2 Key research findings

The baseline research has uncovered insights into aspects of communications from audience awareness and understanding, to levels of support, appropriate messages, and preferred communications approaches and methods.

The key findings of most relevance for informing our understanding of how the communications concepts can be applied are:

- » The strong overall level of support for the project among the general public.
- » The low to moderate awareness and understanding of Inland Rail among the general public overall, with higher levels of awareness and understanding within the corridor.
- » The limited and confused understanding of the involvement and roles of the Australian Government and ARTC among the community and stakeholders.
- » That people want to know more about key aspects of the project including the route location and how it was selected, the project cost and how Inland Rail will affect communities.

What do we know about the current level of understanding and awareness of Inland Rail?

- » **There was low to moderate awareness and understanding of Inland Rail among the general public overall, with higher levels of awareness and understanding within the corridor.** Just under half of all survey participants (46%) had heard about the project. Levels of awareness are significantly higher in the corridor area (80%) than in the eastern states (26%) and wider Australia (24%).
- » **While stakeholders have a higher level of awareness about the project, there is a lack of understanding about specific aspects** such as timelines, benefits, environmental, social considerations and return on investment. The majority of stakeholders were aware of the breadth of the Australian Government's transport infrastructure work such as the National Freight and Supply Chain Strategy and road reform and pricing activity and are keen to see how this work would align with or leverage Inland Rail.
- » **Reported low levels of awareness and understanding of Inland Rail among some stakeholder members,** which can be addressed by providing more information about the project.

What level of support currently exists for Inland Rail?

- » **A strong overall level of support for the project among the general public.** Support is strongest in the corridor area (68% compared to 39% of those in other states and territories) and lower among younger people and people with lower levels of awareness of the project Inland Rail.
- » **General support for the project among stakeholders** and potential for more definitive support if provided with



further information about the project. This support extends to supporting future project communications, with the majority of stakeholders stating they will include project information in their monthly membership newsletters, conferences, events and other channels.

- » **Overall, more than two in three members of the community think the benefits of Inland Rail outweigh the challenges**, despite limited awareness and understanding of the project. People in the Corridor area were significantly more likely to think the benefits outweigh the challenges (77%) than Australians in other states and territories (59%). The perception that 'the benefits of the project outweigh the challenges' increased with both previous awareness of the project and with age.



What are people most interested in knowing more about?

- » **People want to know more about key aspects of the project** – including the route location and how it was selected (59% of community participants), the project cost (50%) and how it will affect communities (46%).
- » **Most members of the community do not consider freight rail to be a key infrastructure priority.** Only one in five survey respondents (20%) identified freight rail as a priority when considering it within the context of other types of infrastructure including hospitals and health facilities, social and affordable housing and roads.
- » **There is a limited and confused understanding of the involvement and roles of the Australian Government and ARTC** among the community and stakeholders.
- » When asked to nominate the *single most important benefit of the project*, the **top three** most commonly identified by participants overall were: **taking trucks off the roads (24% of all participants), improving environmental outcomes (16%), and supporting regional communities (14%)**. People in the corridor area were significantly more likely to see support for regional communities as the most important benefit (20%) than those in the eastern states (10%). They were significantly less likely to regard reducing the cost of consumer goods as the most important benefit (7%) than people living in Australia's other states and territories (beyond the eastern states) (22%). Understanding the perceived benefits of the project will allow future communications to leverage this.



Survey question: Which of those benefits is most important to you? (please select one only)

- » **Over four in ten participants were concerned or very concerned about the potential impacts of the project on the environment** (42%, 482). Another four in ten participants were concerned or very concerned about the **potential impacts of the project on local communities** (40%, 460). Over a third were concerned or very concerned about **the project cost** (38%, 428). Understanding the areas of concern will enable future communications materials to address these.



Survey question: How do you feel about the following aspects of the project?

How do people want to receive information about Inland Rail?

- » **Both social media and traditional news media** are trusted sources of information across locations. The communications methods most commonly identified by survey participants for future communications about Inland Rail were: TV (45% of all respondents), mail/letterbox drop (34% of all respondents), email (34%), local newspapers (25%), Australian newspapers (20%), social media (17%) and website (15%). People in Australia's other states and territories were significantly more likely (23%) to propose a website than people in the Corridor (5%). People in the Corridor were significantly more likely to suggest local newspapers (32%) than people in the eastern states (19%). How these preferences will be accommodated and balanced with the need for the efficient use of resources in the national communications approach will be detailed in the Communications Strategy.
- » The preference for future communications about Inland Rail by mail/letterbox drop was shared by approximately one third of people across all locations. However, given the significant geographic scale of the project the costs of hardcopy communication against other methods such as mass media, social media and digital communication need to be considered.

3 Research approach

Detailed information about each aspect of the baseline research including methodology and findings are provided in the accompanying research reports (Appendices A-1, A-2, A-3 and A-4).

Key insights and high-level findings were presented during a 1 May 2018 workshop involving representatives of the Department, the Australian Rail Track Corporation (ARTC) and Elton Consulting. This presentation is available as Appendix A-5.

Key activities undertaken during the research phase involved:

- » Eight focus groups
- » Surveys completed by 1,141 respondents (117 over the phone and 1,024 online)
- » Fifteen key stakeholder interviews
- » GIS research.

A summary of the research methods is provided below.

3.1 Focus Groups

A total of eight focus groups were completed between Monday 26 and Wednesday 28 March in Sydney, Toowoomba, Dubbo and Albury. Participants were professionally recruited by Jetty Research from along the route corridor and the Sydney metropolitan area through random phone interview. The regional focus group locations were selected to reflect the locations of the Department's Regional Liaison Offices and Sydney was selected as a metropolitan sample.

The focus groups provided the qualitative data and research providing key insights for future communications. The focus groups explored:

- » What do people know and think about Inland Rail?
- » What do they value about Inland Rail?
- » How should we be communicating about Inland Rail?

The full Focus Group Research Report is available as Appendix A-1.

3.2 Survey

The survey research provides baseline data about people's existing levels of awareness and understanding of Inland Rail, sentiment towards the project, and communications preferences. It also provides demographic information to inform an understanding of any key differences in levels of awareness, knowledge and attitudes by location and across population groups. This information has guided the target audience definitions as well as the targeting and tailoring of communications material for each audience. This is detailed in the Inland Rail Communications Strategy.

The survey was completed between Thursday 19 and Tuesday 24 April, with a total sample size of 1,141 completed responses including 117 by phone and 1,024 online. The survey was conducted with members of the general public living in Australia, with a particular focus on people located in the eastern states of Victoria, NSW and Queensland.

The survey research: was conducted in accordance with the proposed approach and methodology as documented in the Research Plan, Appendix A-6, with the following noted:

- » The survey achieved a total sample size of 1,141 completed responses (slightly lower than the target 1,200). This was due to a low level of interest in the topic area and lengthy survey completion time. Communications will need to be targeted and appealing in order to achieve cut through. Information should be concise and provide details about how to access further information for people with higher levels of interest.
- » The multi-mode survey approach achieved a total of 1,024 responses online and 117 by phone. The proposed online component of the survey fieldwork was completed using an online panel. The proposed Computer Assisted Telephone Interview (CATI) component involved recruitment of all candidates by phone, to provide them with an opportunity to complete the survey by phone or online. People who work for the Department and the Australian Rail Track Corporation (ARTC) were excluded as part of the initial screening process for the survey.
- » Overall, the survey achieved a random sampling error (RSE) of +/- 2.9% at the 95% confidence level. Sampling error for each of the sub samples is in the survey report in Appendix A-2.

The survey achieved a fairly even balance of men (47%, 534) and women (53%, 603) from a range of age groups. Forty five percent of participants were aged 56 years and over, one third were aged 36-55 years, just under one in five (18%) were aged 26-35 years, and another five percent was aged 18 to 25 years. While this broadly reflects the age profile of the Australian population, it more closely reflects the profile of the corridor, which is older than the Australian population.

Just under one in ten survey participants (8%, n=86) reported speaking a language other than English at home. This compares with 22.2% across Australia. The most commonly spoken languages other than English were Italian, Indian languages and Chinese languages. Communications should use plain English, graphics and provide details of the relevant government translation service.

A total of 39 survey participants identified as being of Aboriginal or Torres Strait Islander origin. This represented 3.5% of all survey respondents. This compares with 2.8% of people who identified as Aboriginal or Torres Strait Islander persons across Australia. Communications targeting Aboriginal and Torres Strait Islander persons and communities should be appropriate and culturally sensitive.

The full Survey Research Report is available as Appendix A-2.

3.3 Stakeholder interviews

A total of fifteen interviews were conducted between 27 March and 17 April 2018. The purpose of the stakeholder interviews was to identify and explore perspectives of key stakeholders about Inland Rail, specifically:

- » awareness (high, medium or low) and understanding of the project
- » attitudes (supporting, ambivalent or unsupportive) and areas of interest
- » opportunities to support future communications.

Approaches were made to 30 organisations with 15 accepting the invitation to be interviewed. Interviews were conducted with the [REDACTED]

[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]

The full Stakeholder Interview Report is available as Appendix A-3.

3.4 Geographic Information Systems (GIS)

GIS mapping technology has been used to show demographic and other data to build a report which provides greater understanding of the target audiences and to help shape the Communications Strategy. The GIS research was undertaken using data from the **2016 Australian Bureau of Statistics Census of Population and Housing** to provide detailed information about each of the 13 Inland Rail project areas.

Given the expansive overall scale of the alignment and specific characteristics of each of the 13 projects, an understanding of these communities of interest (and the differences between them) provides an important underpinning for effective communication.

Initial analysis of population data demonstrates the need for careful tailoring and targeting of communications materials. Insights into differing population characteristics include:

- » **Between 2011 and 2016, rates of population growth varied considerably across the corridor area.** Whereas the growth rate for Australia overall was 14.4%, five of the localities along the route alignment experienced higher rates of growth, with the highest being in the Tottenham to Albury locality at 27.2%. By contrast, another six localities experienced very low or negative growth (ie between 3.4% in Narromine to Narrabri and -5.1% in the Illabo to Stockinbingal locality). The approach outlined in the Communications Strategy explains how the communications about Inland Rail will be tailored to the local conditions including rates of growth and decline, available workforce and opportunity.
- » **There is a slightly older age profile within the corridor than for Australia overall.** The median age of the population in the corridor area (ie 10 kilometres either side of the alignment) is 38 years, compared with the national median of 37 years. The community within 10 kilometres either side of the Illabo to Stockinbingal alignment had the highest median age of the 13 project areas at 48 years. The age profile of the project communities has relevance for both the likely topics of interest and preferred methods of communication across the 13 localities, particularly where the age profile indicates underlying problems such as youth exits and community decline.
- » **There are significantly higher proportions of Aboriginal and Torres Strait Islander persons living in the corridor area than in Australia overall (2.7%).** The proportion of Aboriginal and Torres Strait Islander persons living in all but two of the 13 areas was considerably higher than the national average. In the North Star to NSW/QLD locality, Aboriginal and Torres Strait Islander persons accounted for more than half the local population (51%). Communications targeting Aboriginal and Torres Strait Islander persons and stakeholders will be particularly important in a number of localities. Information must be presented using methods that are culturally appropriate.
- » **There is a higher unemployment rate in six of the alignment localities than for Australia overall (6.9%).** The area with the highest unemployment rate was the North Star to NSW/QLD locality, with just under 11% unemployment. Communications about jobs, training and economic benefits relating to Inland Rail are expected to be of particular interest to communities in many of the localities within the corridor.
- » **There is generally a high level of internet access across the corridor at around 70-80%, compared with 83% for Australia overall.** However specific localities along the alignment have significantly lower levels of internet connectivity. For example, within communities 10 kilometres either side of the North Star to NSW/Queensland alignment, the level of internet access is 58%.

As the project progresses, further information can be obtained to provide insights on key variables of interest. The full report is available as Appendix A-4. It includes information on:

- » Population growth rates
- » Median age in years
- » Aboriginal and Torres Strait Islander persons
- » Persons born overseas
- » Persons who speak a language other than English at home
- » SEIFA index
- » Internet access
- » Median total household income (gross)
- » Unemployment rate
- » Youth unemployment rate
- » Level of education attained by adult persons.

4 Audience insights

Key insights from the research – including interests and communications preferences – are shown by geographic area below. This information provides an understanding of the specific topics of interest and preferences for future communications for people living in the corridor, in the Eastern States and whole of Australia, and the differences between. This information has been used to inform the selection of tools and tactics in the Communications strategy.

Table 1 Geographic group insights identified through the research

Geographic group	Characteristics (ie current awareness and support)	Preferred methods of communication
<p>People living along the alignment</p>	<p>Awareness of Inland Rail:</p> <ul style="list-style-type: none"> » 80% had heard about Inland Rail » 15% had not heard about Inland Rail » 5% Not sure <p>Overall support for Inland Rail:</p> <ul style="list-style-type: none"> » Strongly support 68% » Oppose 5% » Neutral 28% 	<p>Top ten methods of communication:</p> <ol style="list-style-type: none"> 1. TV (43% of survey participants) 2. Email (33%) 3. Local newspapers (32%) 4. Mail/letterbox drop (31%) 5. Social media (18%) 6. Australian newspapers (17%) 7. Local radio (16%) 8. Australian radio (11%) 9. Through local councils/Members for Parliament (11%) 10. Face to face (eg information booths or meetings in your area) (6%) <p>Social media use in last 48 hours:</p> <ul style="list-style-type: none"> » Yes (53%) » No (47%) <p>Preferred social media platforms:</p> <ol style="list-style-type: none"> 1. Facebook (41%) 2. YouTube (7%) 3. Instagram (4%) 4. Twitter (3%) 5. LinkedIn (3%) <p>Most trusted sources of information for accessing news (ie websites, discussion forums and social media):</p> <ol style="list-style-type: none"> 1. TV (general) (31%)

Geographic group	Characteristics (ie current awareness and support)	Preferred methods of communication
		<p>2. Newspaper (general) (27%)</p> <p>3. Facebook (26%)</p> <p>4. ABC (general) 14%</p> <p>5. Internet (website / email / blog / forum) (12%)</p> <p>Possible spokespeople for Inland Rail:</p> <p>1. Local councils (43%)</p> <p>2. Businesses, farmers, producers, truck drivers etc (40%)</p> <p>3. Members for Parliament (46%)</p> <p>4. Business / industry peak organisations (21%)</p> <p>5. Regional Development Australia representative (15%)</p>
<p>Eastern States</p>	<p>Awareness of Inland Rail:</p> <ul style="list-style-type: none"> » 26% had heard about Inland Rail » 59% had not heard about Inland Rail » 14% Not sure <p>Overall support for Inland Rail:</p> <ul style="list-style-type: none"> » Strongly support 46% » Oppose 4% » Neutral 50% 	<p>Top ten methods of communication:</p> <ol style="list-style-type: none"> 1. TV (45%) 2. Mail/letterbox drop (36%) 3. Email (35%) 4. Australian newspapers (21%) 5. Web (20%) 6. Local newspapers (20%) 7. Social media (17%) 8. Australian radio (10%) 9. Local radio (7%) 10. SMS (6%) <p>Social media use in last 48 hours:</p> <ul style="list-style-type: none"> » Yes (66%) » No (34%) <p>Preferred social media platforms:</p> <ol style="list-style-type: none"> 1. Facebook (55%) 2. YouTube (22%) 3. Instagram (16%) 4. Twitter (11%) 5. LinkedIn (7%) <p>Most trusted sources of information for accessing news (ie websites, discussion forums and social media):</p> <ol style="list-style-type: none"> 1. Facebook (26%)

Geographic group	Characteristics (ie current awareness and support)	Preferred methods of communication
		<p>2. Newscorp (14%)</p> <p>3. Nine Online (13%)</p> <p>4. TV (general) (13%)</p> <p>5. ABC (general) (10%)</p> <hr/> <p>Possible spokespeople for Inland Rail:</p> <p>1. Local councils (40%)</p> <p>2. Businesses, farmers, producers, truck drivers etc (35%)</p> <p>3. Premier (31%)</p> <p>4. Members for Parliament (26%)</p> <p>5. TV / Radio personalities (22%)</p>
<p>Rest of Australia</p>	<p>Awareness of Inland Rail:</p> <ul style="list-style-type: none"> » 24% had heard about Inland Rail » 61% had not heard about Inland Rail » 15% Not sure <p>Overall support for Inland Rail:</p> <ul style="list-style-type: none"> » Strongly support 39% » Oppose 5% » Neutral 57% 	<p>Top ten methods of communication:</p> <ol style="list-style-type: none"> 1. TV (51%) 2. Mail/letterbox drop (35%) 3. Email (31%) 4. Local newspapers (27%) 5. Web (23%) 6. Australian newspapers (22%) 7. Social media (17%) 8. Local radio (9%) 9. Australian radio (8%) 10. Through local councils/Members for Parliament (6%) <hr/> <p>Social media use in last 48 hours:</p> <ul style="list-style-type: none"> » Yes (72%) » No (28%) <hr/> <p>Preferred social media platforms:</p> <ol style="list-style-type: none"> 1. Facebook (62%) 2. YouTube (26) 3. Instagram (14%) 4. Twitter (9%) 5. LinkedIn (5%) <hr/> <p>Most trusted sources of information for accessing news (ie websites, discussion forums and social media):</p> <ol style="list-style-type: none"> 1. Facebook (20%)

Geographic group	Characteristics (ie current awareness and support)	Preferred methods of communication
		<p>2. Internet (website / email / blog / forum) (19%)</p> <p>3. ABC (general) (15%)</p> <p>4. Digital news (general) (14%)</p> <p>5. Newscorp (13%)</p> <hr/> <p>Possible spokespeople for Inland Rail:</p> <p>1. Businesses, farmers, producers, truck drivers etc (40%)</p> <p>2. Local councils (33%)</p> <p>3. Members for Parliament (31%)</p> <p>4. Premier (24%)</p> <p>5. TV / Radio personalities (22%)</p>

A Appendices

A-1 Focus Groups Research Report

A-2 Survey Research Report

A-3 Stakeholder Interviews Report

A-4 GIS Research Report

A-5 Research Findings Presentation

A-6 Research Plan



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