



Penrith City Council Distinguishing Identity Research

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Conducted for:
Penrith City Council

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Executive Summary and Conclusions

This report summarises the findings of a large telephone survey conducted for Penrith City Council. The objective of the survey was to assess the perceptions of Sydney residents of Penrith and surrounding areas to determine whether the Penrith area has achieved a unique identity in line with the objectives outlined in the “Penrith City 2000+ Strategic Plan 2000-2004” document.

Telephone interviews were conducted with persons aged 18 years and over from across Sydney. Quotas were set to ensure a set number of interviews were achieved in various areas across Sydney. We have then weighted the data according to population statistics by region to ensure that the results reflect a representative sample of Sydney residents.

Survey Findings

Key findings from the research are as follows:

Familiarity

- *Overall, awareness of Penrith is on a par with most of the other western LGA’s included in the research. The combined ‘Know it well’/‘Know a fair amount’ score for Penrith is 25%, compared with 29% for Liverpool, 24% for both Blacktown and Baulkham Hills, 18% for Campbelltown and 12% for Camden.*
- *Whilst most of the above awareness scores are quite close, there is some indication that respondents felt they were somewhat more aware of Liverpool than any of the other areas. In fact, whilst the combined score for Liverpool is only 4% above that for Penrith, this difference is statistically significant at the 95% confidence level.*
- *Campbelltown appears to have the lowest awareness level of the suburban areas.*
- *That respondents have relatively low awareness of Camden is not altogether unexpected, given that it is the one area that is outside the greater metropolitan area.*
- *Penrith residents aside, the Baulkham Hills/Blacktown/Liverpool residents appear to have the greatest familiarity with Penrith, recording a combined ‘Know it very well’/‘Know a fair amount’ score of 40%.*
- *In contrast, familiarity with Penrith was lowest amongst North residents (combined score of 8%) and East/South residents (combined score of 13%). However, these sub-samples tended to have below-average familiarity with most of the western regions included in the research.*

(See Section 1)

Unaided Impressions of Regions

- *Two broad issues (or groups of issues) emerged when we asked respondents what words or phrases they would use to describe Penrith:*
 - *Facilities, such as shopping centres, leagues club, football team, water sports, etc.*
 - *The natural surroundings, such as the Blue Mountains and the Nepean River.*

Encouragingly, references to crime, low socioeconomics and even over-crowding were relatively low when compared with the responses for Liverpool, Blacktown and Campbelltown. However, the dominant set of negative comments about Penrith dealt with it being too far away (11%). These comments were more likely to be made by those with less familiarity of the Penrith area, suggesting that perhaps these respondents claim to know less about Penrith because they haven't been there (very often) because they perceive it as being too far away.

(See Section 2.1)
- *In contrast to Penrith, comments about Liverpool and Blacktown were more polarised. On the positive/neutral side, comments focussed on the facilities available and the people (especially the ethnic mix of people). However, the positive comments weren't as dominant for these areas as they were for Penrith.*

On the negative side, comments about crime/gangs/violence, low socioeconomics and over-crowding dominated

(See Sections 2.2 and 2.3)
- *Unaided impressions of Campbelltown were somewhere between Penrith on the one hand and Liverpool/Blacktown on the other. Positive/neutral comments were fragmented, but there were some mentions of the natural surroundings to complement the more 'generic' mentions of facilities, people and housing.*

On the negative side, perceptions of crime are a problem, as they are for Liverpool and Blacktown. However, there are fewer mentions of lower socioeconomics. The other dominant negative comment centred on Campbelltown being too far away.

(See Section 2.4)
- *The mix of comments about Baulkham Hills was completely different to Penrith, Liverpool, Blacktown and Campbelltown. The majority of comments were positive/neutral, with only fragmented negatives appearing (traffic/access appears to be an issue, and some respondents felt it was overpopulated. However, references to crime were non-existent).*

The mix of positive/neutral comments about Baulkham Hills indicates an ‘aspirational’ image – perceptions of wealth, natural surroundings, large/quality homes and new/developing housing estates.

(See Section 2.5)

- *Camden generated overwhelmingly positive comments. The only real negative to emerge was that Camden is a long way from Sydney, which is probably more a statement of ‘relative fact’ than a negative image perception (Camden was the only non-metropolitan area included in the research, which may have served to highlight the distance factor).*

However, the dominant image perception of Camden is of a country/rural/scenic area. A sizeable minority of respondents also felt it was a growing/progressive area.

(See Section 2.6)

Aided Impressions of Regions

- *Respondents were asked to write down the names of six areas; ‘Penrith and surrounding areas’, ‘Liverpool and surrounding areas’, ‘Blacktown and surrounding areas’, ‘Campbelltown and surrounding areas’, ‘Baulkham Hills and surrounding areas’ and ‘Camden and surrounding areas’. The interviewers then read out a series of 13 statements and asked respondents to nominate which, if any, of the areas each statement applied to. The 13 statements were all drawn from the ‘Penrith City 2000+ Strategic Plan 2000-2004’ document. The purpose of the question was to determine whether Penrith has a unique identity or image amongst Sydney residents relative to other western LGA’s, based on the stated objectives outlined in the Strategic Plan.*

The findings were that Penrith does indeed have a unique identity relative to the other LGA’s included in the research:

- *At a global level, Penrith has generated the highest average score per statement of 29%, compared with 25% for Camden, 22% for Baulkham Hills, 21% for Liverpool, 18% for Campbelltown and 16% for Blacktown.*

In other words, across the 13 statements respondents were generally more likely to select Penrith than any other of the listed areas¹.

¹ It should be noted that the 13 statements were all meant to be relevant to Penrith (because they were drawn from the Strategy Plan), whilst the other regions may not want (or be able) to position themselves in these ways. Having said that,

- *At a more micro level, Penrith generated the highest or second highest number of mentions on ten of the 13 statements². In contrast, none of the other regions included in the research generated more than five highest or second highest scores.*

*In other words, Penrith isn't the dominant area on all 13 statements. However, it is **one** of the dominant areas on ten of the 13 regions, suggesting that the perceptions of Sydney residents about Penrith (more so than any other region) tend to reflect the strategic objectives outlined in the Strategic Plan.*

➤ *Exploring the Penrith identity/image further, we see that:*

- *Penrith is perceived to be a modern area, generating the highest number of mentions in terms of 'Innovative area', 'Vibrant area' and 'Progressive area'. These are fairly intangible attributes, potentially providing Penrith with a competitive advantage because they are not necessarily easily emulated by other regions.*
- *Penrith is seen as a business centre ('Major economic centre', 'Major administrative centre'), although Liverpool has a stronger image in this regard.*
- *Camden clearly dominated the natural/rural related attributes. However, excluding Camden and focussing on the other metropolitan-based areas, we see that Penrith has a more relaxed, rural image than do the other metropolitan areas, scoring relatively well on 'Different from other metropolitan areas in Sydney', 'Has natural beauty such as bushland and waterways', 'Blend of urban and rural qualities' and 'Relaxed feel'.*
- *There is some perception amongst respondents that Penrith has 'Good quality education facilities', although Baulkham Hills dominates on this dimension.*
- *Two statements where Penrith has not dominated are 'Major cultural centre' and 'Cosmopolitan feel'. Liverpool and, to a lesser extent, Blacktown, have dominated on these statements. Whilst we cannot be sure, our sense is that respondents may have interpreted 'cultural' as multi-cultural rather than 'the arts' – this would also explain the 'Cosmopolitan' responses.*

The purpose of the research was to determine whether Penrith has a unique identity relative to its western neighbours, so it is almost irrelevant whether or not the other areas wanted or were able to be seen in a similar way.

² Our belief is that with six quite disparate regions and 13 statements that covered a range of images/perceptions, it is unlikely that any one region could be expected to generate the highest number of mentions on all 13 statements. However, it is more plausible to expect Penrith to generate the highest or second highest mentions on most statements, which is what this analysis is based on.

- *The other statement where Penrith has not dominated is 'Attractive area', being rated third behind Camden and Baulkham Hills. Given the natural/rural attributes mentioned above, we expected Penrith to perform better on this statement. However, our hypothesis is that respondents have interpreted the statement more broadly than just physically attractive – they may have assumed it meant an area that would attract you. As noted earlier, open ended comments about Camden and Baulkham Hills were almost totally positive. In contrast, comments about Liverpool, Blacktown and (to a lesser extent) Campbelltown were predominantly negative. Penrith sat somewhere in the middle – perceptions of crime, low socioeconomics and even overcrowding were low for Penrith relative to Liverpool, Blacktown and Campbelltown, but they were mentioned. This may have tempered respondents' enthusiasm for selecting Penrith when thinking of 'attractive areas'.*
- *Not surprisingly, Penrith residents provided considerably higher scores for Penrith on most statements than did the rest of the sample. In particular, Penrith residents felt that Penrith was 'Innovative', 'Attractive', 'Has a relaxed feel' and 'Has good quality education facilities'.*

In contrast, they were less enthusiastic when it came to claiming that Penrith was 'Different from other metropolitan areas' and 'Has a cosmopolitan feel'.

- *Following on from the above point, when averaging out the 13 statements, Penrith residents gave higher scores for Penrith than residents of other areas gave **their own** areas. This adds further support to the notion that Penrith has a unique identity based on the 13 statements and five other regions included in the research – even Penrith residents see their area somewhat differently to how those who live elsewhere see their local areas.*

(See Section 3)

Appeal of Regions

- *As a final measure, respondents were asked which, if any, of the six areas they had written down were 'Nice areas to live in' and which, if any, were 'Nice areas to work in'. Camden and Baulkham Hills absolutely dominated responses to the 'Live in' question, whilst Penrith was on a par with the two of them when it came to the 'Work in' question. Liverpool, Blacktown and Campbelltown performed relatively poorly, particularly in terms of the 'Live in' question.*

To some extent these results (particularly the ‘Live in’ results) reflect the earlier finding about the ‘Attractive area’ statement. Both Camden and Baulkham Hills generated predominantly positive comments on the open-ended questions, so it is not surprising that they are seen as ‘attractive areas’ and even ‘nice areas to live in’. In contrast, Liverpool, Blacktown and Campbelltown generated a large number of negative comments (especially about crime/violence, low socioeconomics and even overcrowding), so it is not surprising that they scored less well in terms of being seen as ‘attractive areas’ and ‘nice areas to live in’. Penrith fell somewhere between these two extremes in terms of open ended comments (i.e.: a better balance of positives, with less emphasis on crime etc), so it is perhaps not surprising to see Penrith score in the middle in terms of being an ‘attractive area’ and a ‘nice area to live in’.

In short, Camden and Baulkham Hills may be seen as more appealing places to live in than is Penrith, but Penrith appears to have a distinct advantage over its nearest western metropolitan neighbours.

And the fact that Penrith scored on a par with both Camden and Baulkham Hills in terms of being ‘A nice place to work’ is an encouraging finding.

*It is also encouraging to note that Penrith residents have been more favourable about their local area as a place to live/work than have Liverpool, Blacktown and Campbelltown residents been about **their own** local areas. Only Baulkham Hills residents were more committed to their area as a place to live/work.*

(See Section 4)

Conclusions

Our conclusions based on this research are as follows:

- *The Penrith area **does** appear to have a unique identity or image relative to the other western LGA’s included in the research, based on the 13 statements researched.*

*By ‘unique’ we do **not** mean that **only** Penrith is associated with the 13 statements. However, on average there is a stronger association on most attributes with Penrith than with the other regions.*

- *The unique image of Penrith is in line with the strategic objectives as outlined in the “Penrith City 2000+ Strategic Plan 2000-2004” document.*

- *The main areas where Penrith distinguishes itself from its neighbours include:*
 - *Being innovative, vibrant and progressive (what we have loosely termed ‘modern’).*
 - *A business centre.*
 - *A natural/rural area.*
- *It is worth noting that the research was not designed to identify what initiatives, communications, etc, have contributed to this unique image. Thus, whilst the image of Penrith appears to be broadly in line with the objectives outlined in the Strategic Plan, we cannot determine what factors have helped to shape that image.*

In addition to assessing the current situation, the research also provides some additional insights that could be considered by Council when drafting future Strategic Plans:

- ***Maintain a Unique Identity:*** *We have noted that some of Penrith’s neighbours (Liverpool, Blacktown and Campbelltown) have some negative perceptions (eg: crime, low socioeconomics, etc). Penrith received fewer of these negative mentions, which provides some level of (positive) differentiation. It is not clear from the research what has contributed to this differentiation (i.e.: Is it fact, result of communications, perception based on other factors, etc?). However, our belief is that if Sydney residents were to stop seeing Penrith as different, the area may be tarred with the same negative brush. Thus, it is important that Council continues to pursue a differentiated image.*

Looked at another way, we do not believe that Penrith should attempt to emulate its neighbours. This may appear to be an obvious statement given the above comments about Liverpool, Blacktown and Campbelltown. However, we believe Penrith should also resist the temptation to emulate Baulkham Hills. We have noted that based on the open ended comments provided by respondents, perceptions of Baulkham Hills were very aspirational – wealth, opulent housing, etc. However, Baulkham Hills is mainly seen as a residential location with some nice natural surroundings – its image is not as comprehensive as is Penrith’s.

- ***Enhance the ‘Natural/Rural’ Image:*** *Penrith’s proximity to natural features presents Council with something of a paradox. On the one hand, it is possible that people see Penrith in the shadows of the Blue Mountains – from a tourism/leisure perspective, this could render Penrith irrelevant as a tourism/leisure destination. On the other hand, the proximity to the Blue Mountains, along with the river/lakes*

system, helps to differentiate Penrith (as a suburb of Sydney) from some of its neighbours.

On balance, we believe Council should continue to use Penrith's natural surroundings as the cornerstone of its image, because it has been one of the main factors contributing to the differentiation mentioned above. Indeed, our hypothesis is that perceptions of natural/ rural features may in fact help to reduce negative perceptions of crime etc (i.e.: perceptions of tranquillity and open spaces may to some extent counteract thoughts of crime and overcrowding).

Our feeling is that the 'River, Mountains, Lakes' positioning is probably appropriate; that is, more emphasis on water than on mountains, in order to counteract (even complement) the Blue Mountain monopolising the nature positioning. From a strategy viewpoint, this would require Council to work with the appropriate authorities to ensure the water quality on the river and lakes is acceptable, and then communicating this point to the general public.

- **Promote an Entertainment/Leisure Positioning:** *One of the findings of the open ended questions was that respondents associated a number of leisure facilities with Penrith; shopping centres, Panthers Leagues Club, Penrith Panthers Football Team, water sports, tourist attractions, etc. Shopping centres were a feature of other locations as well, such as Liverpool and Blacktown. However, the other items were fairly unique to Penrith.*

A focus on water sports/water parks would not only assist in building this entertainment/leisure positioning but also complement the 'natural' image discussed in the previous point. The likely target market for such activities would be residents of other western LGA's – it is unlikely that too many North, South and East residents would turn their backs on the local beaches to pursue water sports elsewhere.

Previous research has shown that Panthers Leagues Club is one of the most (if not the most) recognised landmarks of Penrith. Thus, Panthers provides another platform on which to build the entertainment/leisure positioning.

- **Business Positioning:** *We have noted that Liverpool was mentioned more frequently than Penrith in terms of being an economic centre and an administrative centre. However, there is also a sense that Sydney residents would feel more comfortable conducting business in Penrith than Liverpool, as evidenced by the fact that Penrith generated considerably better 'Nice area to live in' and 'Nice area to work in' scores.*

It may appear contradictory to pursue both a 'natural' image and a 'business centre' positioning. However, Penrith is the only one of the six regions included in the research to score relatively well on both these dimensions. In other words, it appears to have already achieved this balance to some extent and this has contributed to its uniqueness. Thus, it would be worth maintaining and building on these images.

- **Modern Positioning:** *Penrith scored higher than any of the other listed regions in terms of being Innovative, Vibrant and Progressive. This is a particularly valuable finding, as these are fairly intangible elements that are not easily emulated, thereby providing Penrith with a potential competitive advantage. We are unsure what factors have contributed to these perceptions – perhaps it is because a number of respondents felt that Penrith was simply a newer area than more established suburbs such as Blacktown and Liverpool. However, we do recommend that Council actively encourages this 'modern/progressive' perception.*

Introduction

This report summarises the findings of a large telephone survey conducted for Penrith City Council.

The objectives of the survey were as follows:

- Assess the perceptions of Sydney residents of Penrith and surrounding areas to determine whether the Penrith area has achieved a unique identity in line with the objectives outlined in the “Penrith City 2000+ Strategic Plan 2000-2004” document.
- Identify differences in perceptions of the Penrith area by those who live in the Penrith area versus those who live elsewhere in Sydney.
- Identify any issues that exist with people’s perceptions of the Penrith area that could be addressed in future strategic plans.

Details of the survey are as follows:

- ✓ **Methodology:** 609 stratified random telephone interviews.
- ✓ **Sample:** Respondents were randomly selected from nine ‘regions’ within the Sydney metropolitan area. The nine regions are shown in a map in Technical Appendix 1, along with the number of interviews achieved in each region.

This was a ‘general population’ survey, meaning that anyone aged 18 years or over was eligible to participate. Note that we set age/sex quotas to ensure we obtained a representative sample of the general population. Only one person was interviewed per household.

- ✓ **Data Weighting:** As noted above, our sample was deliberately skewed to ensure we obtained a certain number of interviews per region. For instance, 25% of the interviews were conducted with Penrith-area residents, even though Penrith-area residents account for closer to 5% of the Sydney population. Accordingly, we have weighted the data to reflect the actual population in each region. For example, whilst Penrith residents represented 25% of the sample, their answers have been weighted down to reflect just 5% of the overall results.

The sample sizes shown in the summary tables of this report reflect the actual sample achieved, not the weighted/adjusted sample size. This is so the reader can assess the ‘accuracy’ of the findings based on the sample size. However, the percentages are taken from computer tables which have been weighted.

- ✓ **Study Dates:** Fieldwork was conducted from December 2 to 16, 2003. Interviews were conducted on weekends and weekday evenings to ensure a more representative sample was obtained.

- ✓ **Questionnaire:** A copy of the questionnaire can be found in Technical Appendix 2. Note that Questions 1, 2, and 3 were rotated to reduce the effects of position bias. The order of reading out the region names on Q3 (when respondents wrote them down) was also rotated.

In line with the stated objectives of this research, a large portion of the questionnaire (Q 3 in particular) utilises wording/phrases that draw heavily on the terminology of the “Penrith City 2000+ Strategic Plan 2000-2004” document.

Findings in Detail

1 Familiarity with Regions (Q1)

The first question of the survey asked respondents to rate how familiar they were with six different Sydney areas. Results for the total sample are summarised in the table below:

	Penrith (n = 609) %	Liverpool (n = 609) %	Blacktown (n = 609) %	Campbell- town (n = 609) %	Baulkham Hills (n = 609) %	Camden (n = 609) %
Know it very well	11	14	11	8	12	6
Know a fair amount about it	14	15	13	10	12	6
Know a little about it	43	38	37	40	33	35
Heard of it but know nothing about it	31	32	37	40	39	45
Have never heard of	**	**	1	1	3	5
Don't know	1	1	1	1	1	3
Total	100	100	100	100	100	100

Key points to note from the above table include:

- **Overall**, awareness of Penrith is on a par with most of its western neighbours; note that the combined 'Know it well'/'Know a fair amount' score for Penrith is 25%, compared with 29% for Liverpool, 24% for both Blacktown and Baulkham Hills, 18% for Campbelltown and 12% for Camden.

In short, in a general sense Sydney residents' awareness of Penrith appears to be no better or worse than their awareness of surrounding areas.

- Having said that, there is some indication that respondents felt they were somewhat more aware of Liverpool than any of the other areas. Indeed, although the difference is quite small, it is statistically significant at the 95% confidence level.
- In contrast, the Campbelltown scores are significantly lower than most of the others, indicating that it is not as well known as its close suburban neighbours.
- That respondents have relatively low awareness of Camden is not altogether unexpected, given that it is the one area that is outside the greater metropolitan area.

Table 1b below summarises the familiarity ratings of Penrith by where respondents live:

Table 1b: Familiarity with Penrith (Q1c) – By Sub-samples

	Total Sample (n = 609) %	B'Hills/ B'town/ Liverpool Residents (n = 96) %	Campbell -town Residents (n = 60) %	Central/ Inner West Residents (n = 72) %	East/ South Residents (n = 77) %	North Residents (n = 76) %	Other West Residents (n = 76) %	Penrith Residents (n = 152) %
Know Penrith very well	11	21	12	1	1	3	12	72
Know a fair amount about it	14	19	10	24	12	5	14	20
Know a little about it	43	38	43	43	45	50	45	7
Heard of it but know nothing about it	31	17	35	29	39	42	29	1
Have never heard of	**	1	0	3	0	0	0	0
Don't know	1	4	0	0	3	0	0	0
Total	100	100	100	100	100	100	100	100

Ignoring the Penrith residents for the moment, the Baulkham Hills/Blacktown/Liverpool residents appear to have the greatest familiarity with Penrith, recording a combined 'Know it very well'/'Know a fair amount' score of 40%. What makes this finding so interesting is that the other western regions all recorded consistently lower scores (22% for Campbelltown residents, 25% for Central/Inner West residents and 26% for Other West residents).

Familiarity with Penrith was very low amongst North residents (combined score of 8%) and East/South residents (combined score of 13%) – these respondents were more inclined to indicate they 'Know a little' or 'Heard of but know nothing' about Penrith. This raises the question as to whether the North and East/South residents also had limited familiarity with the other western regions. Table 1c overleaf explores this issue – we have analysed the *combined* 'Know it well'/'Know a fair amount' scores for all six regions by which region the respondent lived in:

Table 1c: Familiarity with Regions (Q1a-f) – Combined “Know it very well” and “Know a fair amount about it” Scores by Sub-samples

	Total Sample (n = 609) %	B’Hills/ B’town/ Liverpool Residents (n = 96) %	Campbell -town Residents (n = 60) %	Central/ Inner West Residents (n = 72) %	East/ South Residents (n = 77) %	North Residents (n = 76) %	Other West Residents (n = 76) %	Penrith Residents (n = 152) %
Penrith	25	40	22	25	13	8	26	92
Liverpool	29	42	67	22	29	4	38	21
Blacktown	24	59	17	21	12	7	24	61
Campbelltown	18	19	92	11	17	7	18	20
Baulkham Hills	24	49	12	24	8	21	30	24
Camden	12	9	63	6	12	9	8	20

As can be seen, The North residents had low awareness of all regions except for Baulkham Hills, where they had noticeably higher familiarity. This is perhaps to be expected given Baulkham Hills is in the North-west of Sydney.

Similarly, the East/South residents gave fairly consistently low ratings to all regions except for Liverpool. This may reflect the South residents travelling to or through the Liverpool region.

Note also from the above table that Penrith residents gave Penrith a combined score of 92% and Campbelltown residents recorded a combined score of 92% for Campbelltown. Whilst the sample sizes for the other areas were smaller (and hence not shown separately in the above table) their results were similar:

- Liverpool residents (n = 32) gave a combined score of 94% for Liverpool.
- Blacktown residents (n = 32) gave a combined score of 91% for Blacktown.
- Baulkham Hills residents gave a combined score of 97% for Baulkham Hills.

2 Unaided Impressions of Regions (Q2)

Respondents who had at least some familiarity with each region were asked what words or phrases they would use to describe the area. This is an important measure as it is ‘unaided’; that is, respondents used their own words, not phrases/statements we had developed. Results for each region are summarised in the following tables.

2.1 Unaided Impressions of Penrith (Q2c)

Table 2a below (and continued overleaf) is a summary of comments made about the Penrith area:

Table 2a: Unaided Impressions of Penrith (Q2c) – By Awareness of Penrith					
	Total Aware of Penrith (n = 599) %	Know Penrith Very Well (n = 146) %	Know a Fair Amount about Penrith (n = 96) %	Know a Little about Penrith (n = 211) %	Have Heard of Penrith but Know Nothing (n = 146) %
Good shopping/big shopping centre/Penrith Plaza	14	28	24	14	4
Huge club/leagues club/nice clubs/Panthers	12	19	10	15	7
Great football team/Penrith Panthers/they won the rugby	8	2	7	10	7
Sports/rowing/good football ground/sporting facilities/water Olympics there/fishing/skiing	7	7	6	8	7
Good facilities/well serviced/good amenities/lots to do/good parks/good restaurants/great entertainment/city within itself	7	18	13	6	2
Water parks/movie cinemas/Krispy Kremes/Wonderland/Museum of Fire/tourist attractions	4	9	3	5	2
Good transport/more access due to freeway/traffic is controlled/wide streets/good rail lines/plenty of parking	4	14	4	3	0
Good schools/universities	3	1	5	3	**
Satellite city/metropolitan area of is own	2	5	0	4	0
Gross Subtotal – ‘Facilities’ Mentions	61	103	72	68	29
Clean area/greenery/peaceful/nice environment/quiet/picturesque/fresh air	16	34	27	14	7
Close to Blue Mountains/foot of mountains/drive through on way to mountains	15	15	16	17	13
Nepean River/near river/waterways/lake/lake system	8	20	13	7	1
Large area/not congested/less populated/open area, not a lot of concrete/not too developed	7	17	8	6	4
Rural/country/nice country town/country feel/large village	4	5	11	4	1
Gross Subtotal – ‘Natural Surroundings’ Mentions	50	91	75	48	26

Continued Overleaf...

	Total Aware of Penrith (n = 599) %	Know Penrith Very Well (n = 146) %	Know a Fair Amount about Penrith (n = 96) %	Know a Little about Penrith (n = 211) %	Have Heard of Penrith but Know Nothing (n = 146) %
Growing area/growing and developing area/busy area/growing CBD/quiet but getting busy/new housing estates	12	19	17	14	5
Largest growth area in Sydney/major go-ahead/centre of Sydney in terms of population	2	1	4	2	0
Gross Subtotal – ‘Growth’ Mentions	14	20	21	16	5
Established families/family oriented/suburban, settling families/lots of families	6	9	10	6	2
Friendly, happy/pleasant people/great people/lower educated	5	10	14	2	3
Multi-cultural/mix of people/range of people	2	2	7	2	0
All Aussies/not a great ethnic population	1	2	2	1	0
Gross Subtotal – ‘People’ Mentions	14	23	33	11	5
More upmarket/an improving western suburb/modern and historic/young people go ahead area/more affluent/raised house prices/upper class suburb	6	3	8	8	2
Western suburbs/very west/out west of city/‘westy’ area	5	4	4	6	5
Affordable homes/cheaper area/less expensive	2	4	6	1	2
Housing larger and older/larger blocks/spaced housing	2	**	0	4	1
Gross Subtotal – ‘Housing’ Mentions	4	4	6	5	3
Far away/too far from city/too far from beaches/distance/remote	11	6	7	11	16
Too much crime/violence and alcoholism/crime and drugs/need more police	3	6	5	2	3
Rough area/has a bad name/rough people	2	6	2	2	2
Gross Subtotal – ‘Crime’ Mentions	5	12	7	4	5

Continued Overleaf...

	Total Aware of Penrith (n = 599) %	Know Penrith Very Well (n = 146) %	Know a Fair Amount about Penrith (n = 96) %	Know a Little about Penrith (n = 211) %	Have Heard of Penrith but Know Nothing (n = 146) %
Crowded/over crowded/built up/congested/over-populated/ high population//lots of people	5	14	11	5	**
Hot/hot and dusty/dry/extreme temperatures/cold in winter	4	4	2	6	4
Low socio-economic/working class/industrial community/lower educated	4	4	6	5	2
Other mentions	14	30	18	15	5
Can't Say	20	1	2	12	46

Two broad issues (or groups of issues) dominated unaided mentions of Penrith:

- Facilities, such as shopping centres, leagues club, football team, etc. Whilst this category may be artificially inflated by the success of the Penrith Panthers last year, there is still considerable awareness of non football-related facilities, such as shops, water sports and some tourist attractions. In essence, a large number of respondents were aware that the Penrith area has a number of attractions/facilities to offer.
- The natural surroundings, such as the Blue Mountains and the Nepean River.

It is also encouraging to note that, as a general rule, references to crime (gross subtotal of 5%) and lower socio-economic profile (4%) are relatively low for Penrith. For instance, references to crime were 26% for Liverpool, 25% for Blacktown and 22% for Campbelltown. And references to lower socioeconomic area were 9% for Liverpool, 14% for Blacktown and 6% for Campbelltown.

However, the dominant set of negative comments about Penrith dealt with it being too far away (11%). In addition, a handful of other respondents implied that it was distant by making comments such as 'Very west' and 'Out west of city'. These comments were more likely to be made by those with less familiarity of the Penrith area. Whilst we cannot be sure of the causality of this relationship, our hypothesis is that these respondents claim to know less about Penrith because they haven't been there (too often) because they perceive it as being too far away.

Some of the other negatives mentioned by respondents included the Penrith area being overcrowded (5%) and too hot/too cold (4%).

In short, unaided perceptions of Penrith were generally positive. Whilst a handful of negatives emerged, only one was dominant, namely that Penrith was perceived as being too far away. The problem for Penrith is that this psychological distance may not only stop some people wanting to travel out to Penrith, but in other cases it may prevent them from stopping there when passing on their way to the Blue Mountains.

2.2 Unaided Impressions of Liverpool (Q2a)

Table 2b below (and continued overleaf) is a summary of comments made about the Liverpool area:

Table 2b: Unaided Impressions of Liverpool (Q2a) – By Awareness of Liverpool			
	Total Aware of Liverpool (n = 599) %	Subtotal – Know Liverpool Well/ Fair Amount (n = 185) %	Subtotal – Know Liverpool a Little/ Nothing (n = 414) %
Big shopping centres/shops are great/good shops/busy shops	13	21	10
Lots of facilities/amenities/well provided city/lots to do	6	15	3
Mini city/large suburb/well established/CBD	5	4	5
Good by-pass/expressway/M5/new roads/roads well organised	5	4	5
Good train service/big station/easy to get to/accessible transport/new railway line	3	4	3
Good hospital/new hospital/hospital	2	2	2
Cycling/football/swimming pool/basketball/race tracks	2	3	1
Gross Subtotal – ‘Facilities’ Mentions	36	63	29
Multicultural/migrant area/ethnic	13	23	10
Friendly people/nice people	2	4	1
Gross Subtotal – ‘People’ Mentions	15	27	11
Lots of new homes/expanding/growing area/housing developments, units/changing area/older area that has been revamped	13	22	9
Southwest of Sydney/western suburbs/south of Sydney	8	6	8
Not too bad there/good area/not much trouble in streets	4	7	3
Nice area, not so much housing commission/community based	3	6	1
Cheaper houses, units/relatively affordable/cheaper living standard	3	4	3
Close/convenient/central	2	4	1
Industrial area	2	1	2

Continued Overleaf...

	Total Aware of Liverpool (n = 599) %	Subtotal – Know Liverpool Well/ Fair Amount (n = 185) %	Subtotal – Know Liverpool a Little/ Nothing (n = 414) %
Too much crime/dangerous at night/high crime rate/crime and drugs/gangs/violence and alcoholism	16	22	13
Bad area/rough/not friendly	10	11	9
Gross Subtotal – ‘Crime’ Mentions	26	33	22
Crowded, lots of people/congested/greater population density/over populated	16	21	13
Low socio-economic/lower income/working class/lower middle class	8	9	8
A lot of unemployment/not a lot of workers	1	1	1
Gross Subtotal – ‘Low Socioeconomic’ Mentions	9	10	9
Distance/ too far away/too far from city and beaches/need street directory to get there	7	6	8
Lots of trucks/busy transport/heavy traffic/too many cars/roads not effective	6	7	6
Not much greenery/not pretty/not enough parks, gardens	3	1	3
Dirty/untidy/too much rubbish/polluted/run down	2	5	1
Housing commission	2	3	1
Dry and hotter in summer/too hot/ too cold in winter	2	2	2
Other Mentions	20	29	17
Can't Say	19	1	27

Overall, comments about Liverpool were considerably more polarised than they were for Penrith. Main positive/neutral comments focussed on the facilities available (although to a lesser extent than for Penrith), the ethnic mix of people, and the growth of the area (especially new housing estates replacing some older homes). To some extent there are fewer positive distinguishing features for Liverpool than there were for Penrith.

In contrast, there were a substantial number of negative distinguishing features mentioned about Liverpool:

- Crime/gangs/violence (26% of gross mentions).
- Crowded/congested area (16%) and heavy traffic/too many cars (6%).
- Low socioeconomic area (9% of gross mentions).

2.3 Unaided Impressions of Blacktown (Q2b)

Table 2c below (and continued overleaf) is a summary of comments made about the Blacktown area:

Table 2c: Unaided Impressions of Blacktown (Q2b) – By Awareness of Blacktown			
	Total Aware of Blacktown (n = 602) %	Subtotal – Know Blacktown Well/ Fair Amount (n = 199) %	Subtotal – Know Blacktown a Little/ Nothing (n = 403) %
Shops/Westfield/big shopping malls/lots of shops/good prices on clothes	11	24	6
Ice skating rink/not far from Wonderland/good clubs/thriving area because of club amenities/soccer/Parklea markets/Featherdale Wildlife Park/lots of facilities/pool	8	10	7
Good services/good transport/good public transport/great motorway/good infrastructure	5	9	4
Good hospital/thriving Tafe college	1	**	2
Gross Subtotal – ‘Facilities’ Mentions	25	43	19
Friendly, interesting/down-to-earth people	7	16	4
Multicultural/lots of migrants/different ethnics/different cultures	7	10	6
Good family place to live/stable family environment/more young family focussed	3	5	2
Gross Subtotal – ‘People’ Mentions	17	31	12
Growing/expanding/developing area/people moving there because they can afford it/surrounded by large housing projects	13	31	7
Western suburbs/west of Parramatta/’Westie’	4	1	5
Suburban/very suburban/dense urban	3	1	3
Major industrial/growing industrial/plenty of factories	3	1	3

Continued Overleaf...

	Total Aware of Blacktown (n = 602) %	Subtotal – Know Blacktown Well/ Fair Amount (n = 199) %	Subtotal – Know Blacktown a Little/ Nothing (n = 403) %
Cheap rent/cheaper housing/affordable housing	3	4	2
Native bush/nice parks/pretty area/well maintained	2	6	1
Wealthy area/prices have gone up in last few years/booming economy	2	4	2
Crime rate is high/bad reputation for crime/unsafe/negative impression due to crime levels/dangerous	15	21	13
Reputation for bad activities and cultural unrest/bad reputation/nasty area/rough neighbourhood/schools have bad reputation/rough	9	12	8
People just hanging around/a lot of teenagers with loud mouths	1	4	**
Gross Subtotal – ‘Crime’ Mentions	25	37	21
Lower socio-economic status/working class/poorer area/blue collar/low to middle class	12	13	11
High unemployment/welfare problems/high social security bill	2	2	2
Gross Subtotal – ‘Low Socioeconomic’ Mentions	14	15	13
Crowded/very high, dense population/over populated/too many houses	7	13	6
Ugly, no trees/nothing attractive/not green/no parklands/no water/treeless	3	3	4
Fair way out of Sydney/far away from city/long way away	3	1	4
Infrastructure problems/lack of public transport/terrible road system/very busy traffic	3	6	2
Somewhere you drive through/pass it on the way to the Blue Mountains/ long way away/drive through, but wouldn’t stop	2	0	2
Could be cleaner/old and dirty/unclean/fibro houses/run down/very polluted	2	3	1
Hot/dry and sparse	1	1	2
Other Mentions	14	19	12
Can’t Say	26	1	34

The pattern of responses for Blacktown was very similar to that of Liverpool; that is, there were few positive/neutral distinguishing features and a substantial number of negative distinguishing features nominated. Once again, perceptions of crime and low socioeconomic area dominated the negative mentions, although there were fewer references to overcrowding than there were for Liverpool.

2.4 Unaided Impressions of Campbelltown (Q2d)

Table 2d below (and continued overleaf) is a summary of comments made about the Campbelltown area:

Table 2d: Unaided Impressions of Campbelltown (Q2d) – By Awareness of Campbelltown			
	Total Aware of Campbell- town (n = 593) %	Subtotal – Know Campbell- town Well/ Fair Amount (n = 145) %	Subtotal – Know Campbell- town a Little/ Nothing (n = 448) %
A lot of housing estates that have come up quickly/rapid development/ fast growing area/booming/new housing estates/grown really quickly	18	32	14
Good shopping centre/very nice shops/lots of shops/shops convenient	5	11	3
A huge laid out city on its own/everything you need/like a satellite city	5	5	5
Easy to get to transport wise/accessibility to city/close to town	2	8	1
Good roads/end of M5/lots of big roads	2	6	1
Ice rink/skating/sports minded/soccer/active area/quite a lot to do	2	6	1
Gross Subtotal – ‘Facilities’ Mentions	16	36	11
More rural/a lot of bush/like a country town/semi-rural/country feel/not as crowded	9	20	7
Lots of greenery/surrounded by green/a lot of scenic areas/lots of parks/close to attractions like the blue Mountains	4	5	3
Gross Subtotal – ‘Natural Surroundings’ Mentions	13	25	10
Cheaper housing/it’s cheap to live there/cheap area of Sydney/young people live there because they can afford it	6	14	4
Big housing commission area/lot of housing commission	4	6	4
Huge houses/elaborate houses	2	5	1
Gross Subtotal – ‘Housing’ Mentions	12	25	9

Continued Overleaf...

	Total Aware of Campbell- town (n = 593) %	Subtotal – Know Campbell- town Well/ Fair Amount (n = 145) %	Subtotal – Know Campbell- town a Little/ Nothing (n = 448) %
Lots of young families//lot of young people with children/family oriented/ large families/community atmosphere	4	3	4
Diverse/pretty multicultural	3	5	3
Nice people/friendly people/good people	2	7	1
Gross Subtotal – ‘People’ Mentions	9	15	8
Southwest Sydney/’Westies’/South/West	3	2	3
Suburban/very suburban/suburbia	2	4	2
Relatively clean/very clean	2	6	1
Gateway to Canberra/pass through on the way to the Southern Highlands	2	0	3
Lots of crime/unsafe/crime area/bad crime reputation	10	13	9
Rough area, rough people/bit dangerous/too much violence/gangs	7	7	6
A lot of youth problems/street kids hanging around with no occupation/a lot of social problems	2	2	2
A lot of drugs/drug problems getting worse	2	4	2
Unemployment	1	3	1
Gross Subtotal – ‘Crime’ Mentions	22	29	20
Really far out west/long way out/outer suburb/too far from city	14	6	16
Overcrowded/lots of people/over-developed/population growing	7	14	5
Poorer area/lower socio-economic people live there/poor families/less affluent/working class/blue collar	6	4	7
Traffic/very busy/bad traffic/more traffic	3	6	3
Other Mentions	20	41	15
Can’t Say	29	2	35

Impressions of Campbelltown were somewhere between Penrith on the one hand and Liverpool/Blacktown on the other. Positive/neutral comments were fragmented – note the relatively low gross subtotal scores for ‘Facilities’ (16%), ‘Natural Surroundings’ (13%), ‘Housing’ (12%) and ‘People’ (9%). Whilst this is a better mix than for Liverpool and Blacktown (especially the inclusion of the ‘Natural surroundings’ comments), the numbers are relatively low. In fact, the most frequently mentioned item was a perception of rapid growth (18%).

On the negative side, perceptions of crime are a problem (gross subtotal of 22% of mentions), as they are for Liverpool and Blacktown. However, there are fewer mentions of lower socioeconomics. The other dominant negative comment centred on Campbelltown being too far away.

The picture that emerges is that whilst there are some positive image perceptions of Campbelltown, none of them are really dominant. And given there is a ‘concern’ about how far away it is, there seems to be little to attract people to the area.

2.5 Unaided Impressions of Baulkham Hills (Q2e)

Table 2e below (and continued overleaf) is a summary of comments made about the Baulkham Hills area:

Table 2e: Unaided Impressions of Baulkham Hills (Q2e) – By Awareness of Baulkham Hills			
	Total Aware of Baulkham Hills (n = 584) %	Subtotal – Know Baulkham Hills Well/ Fair Amount (n = 154) %	Subtotal – Know Baulkham Hills a Little/ Nothing (n = 430) %
Wealthy/a lot of cash/affluent area/more exclusive/posh	16	21	14
Middle class/mid-range socio-economic class/middle to upper class	8	13	6
More directed to the upper class/upmarket/more classy/elite	4	6	4
Professional people/professional area	1	3	**
Gross Subtotal – ‘Wealthy’ Mentions	29	43	24
Nice atmosphere/pleasant/quiet/peaceful/homely	16	28	12
Nice bushy suburb/bushlands - natural setting/fair amount of trees/green suburbs	11	17	9
Lots of land/open spaces/big area	1	4	1
Nice parks/lots of parklands	1	4	**
Gross Subtotal – ‘Natural Surroundings’ Mentions	29	53	22

Continued Overleaf...

	Total Aware of Baulkham Hills (n = 584) %	Subtotal – Know Baulkham Hills Well/ Fair Amount (n = 154) %	Subtotal – Know Baulkham Hills a Little/ Nothing (n = 430) %
Up and coming development/full of new housing estates/developing area/ rapidly growing	12	14	12
Shopping/close to good shopping/modern shopping/Castle Towers/up- market shops	7	15	4
Lots of activities for kids/lots of facilities/leisure facilities	2	5	1
Schools have a good reputation/good for education/selective schools	2	4	2
Gross Subtotal – ‘Facilities’ Mentions	11	24	7
Quality housing/big houses/top-of-the-range homes	5	8	4
Nice houses/beautiful homes/nice architecture	5	7	5
Gross Subtotal – ‘Housing’ Mentions	10	15	9
Family area/young families/family oriented/family community	6	11	4
Nice people/friendly people/people aren’t too bad	3	9	1
Gross Subtotal – ‘People’ Mentions	9	20	5
Quite clean/tidy/well maintained/people are house proud	4	3	4
Suburban/mainly residential/suburbanised	4	3	4
Hills/hilly environment/nice because not as flat	3	3	3
New suburb/newer area	3	3	3
Out west/Northwest/North	2	1	3
Not as much crime/low crime rate/not a lot of vandalism/safer than other communities	2	6	1

Continued Overleaf...

	Total Aware of Baulkham Hills (n = 584) %	Subtotal – Know Baulkham Hills Well/ Fair Amount (n = 154) %	Subtotal – Know Baulkham Hills a Little/ Nothing (n = 430) %
Heavily populated/becoming overcrowded/population growing/heavily built up	6	11	4
Too far out/too far away/far from the city/outer suburb	5	6	5
Quite a lot of traffic/busy traffic/roads are a nightmare/overcrowded roads	4	8	2
Hard to access railway station/poor transport facilities/not good for public transport	4	9	2
People are stuck-up/snobby/pretentious	2	2	2
Other Mentions	24	43	18
Can't Say	31	3	41

The mix of comments about Baulkham Hills was completely different to Penrith, Liverpool, Blacktown and Campbelltown. The majority of comments were positive/neutral, with only fragmented negatives appearing (traffic/access appears to be an issue, and some respondents felt it was overpopulated – references to crime were non-existent).

The mix of positive/neutral comments indicates an ‘aspirational’ image – perceptions of wealth, natural surroundings, large/quality homes and new/ developing housing estates.

2.6 Unaided Impressions of Camden (Q2f)

Table 2f below is a summary of comments made about the Camden area:

Table 2f: Unaided Impressions of Camden (Q2f) – By Awareness of Camden			
	Total Aware of Camden (n = 569) %	Subtotal – Know Camden Well/ Fair Amount (n = 103) %	Subtotal – Know Camden a Little/ Nothing (n = 466) %
Country/rural/semi-rural/not crowded/big country town	41	64	37
Pretty/scenic/green and lush/nice countryside/picturesque	13	15	13
Good atmosphere/nice country feel/quiet/peaceful/laidback country-style living/tranquil settings	18	42	14
Farms/vineyard area/wineries/orchards/dairy farms/horse studs	7	3	8
Clean/clean air/nice and tidy/well maintained	2	8	2
Gross Subtotal – ‘Natural Surroundings’ Mentions	81	132	74
Growing/very progressive/becoming popular/expanding/developing area	13	28	10
Very far from city/separate from city/remote/distant/too far away	10	11	10
Heritage/historical town/nice historic homes/old town	5	15	4
Large properties/large houses/big blocks	5	7	5
South west/southern highlands/south Sydney	3	3	3
Nice shops/little antique shops	3	12	1
Good to go to for a drive/pretty to drive through/good weekend getaway	3	0	3
Affluent and ‘monied’/expensive rural properties/upper class/more upmarket	2	3	2
Nice people/friendly people	2	8	1
Other Mentions	22	48	18
Can’t Say	32	0	37

There are two noticeable aspects of the above table:

- The only real negative comments deal with how distant Camden is from Sydney³, which is no real surprise (i.e.: it's more a statement of fact than a potentially negative perception).
- The overwhelming image perception of Camden is a country/rural/scenic area.

A sizeable minority of respondents (13% of those aware of Camden) also felt it was a growing/progressive area.

³ There are other negative comments in the 'Other Mentions' section, but they are based on just a handful of comments.

3 Aided Impressions of Regions (Q3)

To complement the open-ended questions in the previous section, we also asked respondents to give their impressions of various locations using a series of pre-coded questions. Interviewers read out a series of statements (shown as Q's 3a to 3m in the table below) and respondents nominated which of the areas they had written down, if any, each statement applied to (the areas are those shown as the column headings in the table below). The table below provides an overall summary of results based on the total sample. Note that this table is read *across* the rows, *not* down the columns. For instance, when asked about which areas were considered 'A major economic centre' (Q3a), 32% said Penrith, 41% said Liverpool, etc. As respondents could nominate more than one location, the rows add up to more than 100%:

Table 3a: Aided Impressions of Regions (Q3a-m) – Total Sample

		Penrith	Liverpool	Black-town	Campbell-town	Baulkham Hills	Camden	None at all
3a. Major economic centre	(n = 609) %	32	41	28	22	13	3	23
3b. Major cultural centre	(n = 609) %	21	36	22	15	12	9	30
3c. Major administrative centre	(n = 609) %	30	38	26	18	16	4	29
3d. Innovative area	(n = 609) %	23	14	11	14	17	10	39
3e. Vibrant area	(n = 609) %	31	19	14	16	16	10	32
3f. Attractive area	(n = 609) %	25	7	5	10	39	41	17
3g. Different from other metro areas in Sydney	(n = 609) %	24	17	19	20	21	47	22
3h. Has natural beauty such as bushland and waterways	(n = 609) %	50	6	3	14	25	48	13
3i. Blend of urban and rural qualities	(n = 609) %	39	12	9	29	19	53	11
3j. Cosmopolitan feel	(n = 609) %	17	36	24	14	16	7	31
3k. Relaxed feel	(n = 609) %	25	5	5	12	25	50	18
3l. Progressive area	(n = 609) %	40	27	28	33	28	29	18
3m. Good quality education facilities	(n = 609) %	22	16	13	17	35	9	36

It should be noted that the statements in the above table were drawn from the “Penrith City 2000+ Strategic Plan 2000-2004” document, so they are all relevant to Penrith, whilst other regions may not want (or be able) to position themselves in these ways. Having said that, the purpose of the research was to determine whether Penrith Council had been successful in creating a *distinguished/unique identity relative to its western neighbours*, so it is almost irrelevant whether or not the other areas wanted or were able to be seen in a similar way.

To assist in a quick ‘eyeball’ assessment of the above results, we have used **blue** font to highlight the highest scoring region on each statement and **green** font to highlight the second highest scoring region. Whilst most of our discussion below centres on the top one or two scoring regions for each statement, it should also be remembered that respondents could select the ‘None at all’ option. For instance, 39% of respondents felt that *none* of the listed areas were ‘Innovative’ (Q3d).

Key points to note from the table include:

- If we consider just the ‘top’ scores (i.e.: **blue** font), three regions tend to dominate:
 - Penrith has four top scores. Interestingly, three of the four are less tangible; ‘Innovative’, ‘Vibrant’, and ‘Progressive’. These three statements loosely tend to suggest a modern region, which may provide a good platform upon which to build.

The fourth statement where Penrith received the highest score is far more tangible; ‘Natural beauty such as bushland and waterways’. Clearly many Sydney residents know that Penrith has more natural features than do the other areas that were covered in the research, which is also another strong foundation for perceptual growth⁴.

- Liverpool also has four top scores. The sense we get is that Liverpool is seen as something of a business centre (‘Major economic centre’ and ‘Major administrative centre’) but also a cultural/cosmopolitan area (‘Major cultural centre’ and ‘Cosmopolitan feel’). Our sense is that respondents have interpreted ‘cultural’ to mean a mix of races/cultures rather than an artistic interpretation of ‘cultural’. This is based on the frequency of comments in the previous section about a mix of races, which was more frequent for both Liverpool and Blacktown (and these two areas have dominated references to ‘Major cultural centre’ and ‘Cosmopolitan feel’).
- Camden has also recorded four top scores. Perhaps not surprisingly, the more rural nature of Camden forms the basis of its positioning; ‘Attractive area’, ‘Different from other metropolitan areas’, ‘Blend of urban and rural qualities’ and ‘Relaxed feel’.
- The final top score belongs to Baulkham Hills for ‘good quality education facilities’.
- Blacktown and Campbelltown failed to receive any top scores at all.

⁴ It is perhaps surprising that Penrith outsourced Camden on this measure (albeit by 2%). However, this may be a result of the overall lower awareness of Camden and that the statement referred to ‘bushland *and waterways*’.

- Of course, it could be argued that no single region could be expected to generate the **highest** score on **most/all** of the 13 statements. After all, the six regions included on the questionnaire had different qualities and strengths/weaknesses, whilst the 13 statements covered a range of images/perceptions. Furthermore, it is possible that trying to be the **dominant** region on **all** 13 statements is actually undesirable because it could result in a very confused, undifferentiated overall image. Thus, we believe it is more appropriate to consider the top two scores (i.e.: the **blue** and the **green** figures).

Encouragingly, Penrith generated the highest or second highest score on ten of the 13 statements. In contrast, none of the other regions included in the research generated more than five highest or second highest scores. Whilst we don't have a benchmark reading from three or four years ago (before the Strategic Plan was implemented), this finding suggests that a somewhat differentiated identity has developed/evolved for the Penrith area. Key aspects of the Penrith image are as follows:

- Penrith is seen as a business centre ('Major economic centre' and 'Major administrative centre') although as previously noted, Liverpool has a stronger image in this regard.
- As previously noted, Penrith is also perceived to be a modern, progressive area ('Innovative area', 'Vibrant area', and 'Progressive area').
- We noted earlier that Camden scored well on the more rural-focussed statements. However, taking into account the highest and second highest scores, Penrith has also performed well in this area ('Different from other metropolitan areas in Sydney', 'Has natural beauty such as bushland and waterways', 'Blend of urban and rural qualities' and 'Relaxed feel'). In short, excluding Camden for the moment and focussing on the remaining five 'metropolitan' areas, Penrith clearly has a more relaxed, rural image than do the other four metropolitan areas.
- There is also some perception that Penrith has 'Good quality education facilities', although Baulkham Hills dominates on this dimension.
- Somewhat surprisingly given the rural image mentioned above, Penrith has not done as well on the more general statement 'Attractive area', being rated third behind Camden and Baulkham Hills. On the positive side, it has scored well above its closest western neighbours (Liverpool, Blacktown and Campbelltown) on this statement. However, there is a sense that whilst many Sydney residents recognise the natural features that exist within the Penrith area, they are not convinced it is an attractive area. In fact, it is possible that respondents have interpreted 'Attractive area' more broadly than just physically attractive – they may have assumed it meant an area that would attract you. As noted in Section 2.1 of this report, perceptions of crime/ violence, low socioeconomics and even over-crowded population were low for Penrith relative to Liverpool, Blacktown and Campbelltown, but they were present and are therefore a potential roadblock.

- Another way of considering whether Penrith has managed to create a differentiated image based on the 13 statements used in the research is to calculate an average score per statement by region – see Table 3b below:

Table 3b: Average of all 13 Statements (Q3a-m) – Total Sample							
		Penrith	Liverpool	Black-town	Campbell-town	Baulkham Hills	Camden
Average of all 13 Statements on Q3	(n = 609) %	29	21	16	18	22	25

As can be seen, Penrith has the highest average score per statement of 29%, indicating that over all 13 statements, respondents selected Penrith more so than any other region. Camden came a close second (25%) thanks largely to its strong performance on the rural-focussed statements. Ignoring Camden for the moment and focussing just on the Sydney suburbs, we can see that Liverpool and Baulkham Hills appear to be the strongest competitors, whilst Blacktown and Campbelltown have less well defined images (at least in terms of the 13 statements included on the questionnaire).

Table 3c below analyses just the Penrith results by the region in which respondents lived:

Table 3c: Aided Impressions of Penrith (Q3a-m) – By Respondent Region								
	Total Sample (n = 609) %	B'Hills/ B'town/ Liverpool Residents (n = 96) %	Campbell -town Residents (n = 60) %	Central/ Inner West Residents (n = 72) %	East/ South Residents (n = 77) %	North Residents (n = 76) %	Other West Residents (n = 76) %	Penrith Residents (n = 152) %
3a. Major economic centre	32	42	23	36	27	28	26	63
3b. Major cultural centre	21	24	12	25	13	24	18	41
3c. Major administrative centre	30	35	27	35	27	22	29	59
3d. Innovative area	23	32	25	22	21	18	16	57
3e. Vibrant area	31	28	33	24	30	33	28	64
3f. Attractive area	25	27	18	29	22	17	25	61
3g. Different from other metro areas in Sydney	24	20	13	33	16	29	26	41
3h. Has natural beauty such as bushland and waterways	50	47	48	50	44	43	55	85
3i. Blend of urban and rural qualities	39	33	37	49	29	37	46	66
3j. Cosmopolitan feel	17	20	10	25	18	8	15	26
3k. Relaxed feel	25	27	13	25	22	20	28	55
3l. Progressive area	40	45	30	38	34	38	41	72
3m. Good quality education facilities	22	30	20	24	9	20	20	68
<i>Average of all 13 Statements on Q3</i>	29	32	24	32	24	26	29	58

The bottom row of the above table provides an average score per statement based on all 13 statements. Given the differences in familiarity with Penrith noted earlier (see Table 1b), we expected there to be sizeable differences in the image perceptions by where respondents live. And whilst there are differences, they are not as great as we had anticipated. The picture that emerges is that whilst many Sydney residents (especially those in the North and East/South) claimed to know very little about Penrith, a number do in fact have some image of what the Penrith area is like. Note for instance that 43% of North residents and 44% of East/South residents believed that the Penrith area ‘Has natural beauty such as bushland and waterways’ – these figures are quite high given that the score for the total sample was 50%. Of course, there is plenty of room for improvement, but there does appear to be a foundation upon which to build.

Interestingly, Campbelltown residents generated relatively low scores for Penrith – note that the Campbelltown resident average score per statement is 24%, identical to the East/South residents and 2% lower than the North residents. This is compared with an average per statement of 32% for the Baulkham Hills/Blacktown/Liverpool residents and 29% for the Other West residents. Perhaps Campbelltown residents are more insular given they are somewhat removed from the rest of the Sydney metropolitan area.

Not surprisingly, Penrith residents generated much higher scores for Penrith than did the rest of the sample. In fact, they were twice as likely as the sample as a whole to select Penrith for the 13 statements. However, some interesting trends also emerged in their responses:

- The Penrith residents were *more than twice as likely* to consider the Penrith area as ‘Innovative’, ‘Attractive’ ‘Relaxed feel’ and ‘Has good quality education facilities’. This last statement may simply reflect that Penrith residents believe their local education facilities suits their *local* needs, whilst those living further a-field may believe there is nothing special in the Penrith area in terms of educational facilities *worth travelling to*.
- However, Penrith residents were not as enthusiastic when it came to claiming that Penrith was ‘Different from other metropolitan areas of Sydney’ and ‘Has a cosmopolitan feel’. In other words, whilst they still gave a higher score for Penrith on these statements than did the sample as a whole, they were not twice as likely to select Penrith.

Whilst it is not surprising to see that Penrith residents gave higher scores for Penrith than did the rest of the sample (in large part due to their greater familiarity with the area), this does not tell whether Penrith residents have a stronger/more distinguished perception of their local area than (say) Liverpool residents have of *their* local area. Table 3d overleaf attempts to address this question, by analysing how residents of each area rated their *own* area (i.e.: the first column shows how the 152 Penrith residents rated Penrith, the second columns shows how the 32 Liverpool residents rated Liverpool, and so on). Three points should be noted about this analysis:

- Some of the sample sizes are quite small (and are shown in red font).
- Camden is not included in this analysis as we did not interview any respondents in Camden (and hence we can’t see how Camden residents rated Camden).
- As with Table 3a, we have used **blue** font to identify the highest scoring region and **green** font to identify the second highest scoring region.

Table 3d: Aided Impressions of Regions (Q3a-m) – By Residents of each Region

	Penrith Residents' Rating of Penrith (n = 152) %	Liverpool Residents' Rating of Liverpool (n = 32) %	Blacktown Residents' Rating of Blacktown (n = 32) %	Campbelltown Residents' Rating of Campbelltown (n = 60) %	Baulkham Hills Residents' Rating of Baulkham Hills (n = 32) %
3a. Major economic centre	63	78	56	58	38
3b. Major cultural centre	41	72	44	52	31
3c. Major administrative centre	59	56	44	42	44
3d. Innovative area	57	34	28	43	56
3e. Vibrant area	64	41	38	32	59
3f. Attractive area	61	28	22	33	78
3g. Different from other metro areas in Sydney	41	34	25	30	50
3h. Has natural beauty such as bushland and waterways	85	22	6	40	66
3i. Blend of urban and rural qualities	66	22	25	43	47
3j. Cosmopolitan feel	26	41	31	22	59
3k. Relaxed feel	55	19	6	35	53
3l. Progressive area	72	44	56	70	59
3m. Good quality education facilities	68	59	47	67	78
<i>Average of all 13 Statements on Q3</i>	58	42	33	44	55

The average scores in the bottom row of the table suggest that, based on the 13 statements included in the research, Penrith residents have a stronger perception of Penrith than do residents of other areas have in terms of their own areas. Looked at another way, Penrith has generated the highest or second highest score on 11 of the 13 statements. As noted earlier, some of the other areas may not want or be able to develop some of the listed image dimensions. However, the purpose of this research was to determine whether Penrith has a unique/distinguished identity relative to some of its closest neighbours, which means it is irrelevant whether the other areas choose to pursue the same positioning or not.

Note that whilst Penrith residents have an edge over the others, the Baulkham Hills residents have rated *their* area very strongly. Indeed, Baulkham Hills has generated the highest or second highest score on nine of the 13 statements, suggesting that Baulkham Hills residents see their area in a similar light to how Penrith residents see their local area.

In contrast, Penrith appears to have quite clearly differentiated itself on the 13 statements from its closer western neighbours, namely Blacktown, Liverpool and Campbelltown.

Table 3e below provides additional analysis of the Penrith scores cross-analysed by respondents' familiarity with the Penrith area.

Table 3e: Aided Impressions of Penrith (Q3a-m) – By Familiarity with Penrith							
	Total Sample (n = 609) %	Know Penrith Very Well (n = 146) %	Know a Fair Amount about Penrith (n = 96) %	Subtotal – Know Well/ Fair Amount (n = 242) %	Know a Little about Penrith (n = 211) %	Have Heard of Penrith but Know Nothing (n = 146) %	Subtotal – Know Little/ Nothing (n = 357) %
3a. Major economic centre	32	53	44	48	34	17	27
3b. Major cultural centre	21	30	28	29	22	13	18
3c. Major administrative centre	30	59	41	49	32	14	25
3d. Innovative area	23	42	38	40	23	11	18
3e. Vibrant area	31	53	52	52	31	14	24
3f. Attractive area	25	39	43	41	24	13	19
3g. Different from other metro areas in Sydney	24	34	27	30	24	21	23
3h. Has natural beauty such as bushland and waterways	50	68	67	68	51	34	44
3i. Blend of urban and rural qualities	39	48	58	54	45	22	35
3j. Cosmopolitan feel	17	13	24	19	19	11	16
3k. Relaxed feel	25	47	32	39	24	17	21
3l. Progressive area	40	65	53	58	44	22	35
3m. Good quality education facilities	22	57	33	43	18	11	15
<i>Average of all 13 Statements on Q3</i>	<i>29</i>	<i>47</i>	<i>42</i>	<i>44</i>	<i>30</i>	<i>17</i>	<i>25</i>

The bottom row of the above table suggests that the *average* difference in image perceptions of Penrith was not too great between those who claimed to ‘Know Penrith very well’ and those who claimed to ‘Know a fair amount about it’; note that the difference between these two columns is just 5%. In contrast, the gap between the ‘Know a fair amount’ and the ‘Know a little’ columns is 12%, and between the ‘Know a little’ and ‘Heard of but know nothing’ columns is 13%.

Comparing the two subtotal columns in the above table, we can see that on average the gap between those with higher awareness of Penrith compared with those who are less familiar is 19% (i.e.: 44% less 25% on the bottom row). Looking at the individual statements, those with the higher awareness of Penrith were more inclined than those with low familiarity to nominate Penrith on the following statements:

- ‘Vibrant area’ (gap of 28% between the ‘Know very well/know a fair amount’ and the ‘Know a little/heard of know nothing’ sub-samples).
- ‘Has good quality education facilities’ (gap of 28%).
- ‘Major administrative centre’ (gap of 24%).
- ‘Has natural beauty such as bushland and waterways’ (gap of 24%).
- ‘Progressive area’ (gap of 23%).
- ‘Innovative area’ (gap of 22%).
- ‘Attractive area’ (gap of 22%).

In contrast, greater awareness appears to have had *less* impact on the following statements:

- ‘Major cultural centre’ (gap of just 11%).
- ‘Different from other metropolitan areas in Sydney’ (gap of just 7%).
- ‘Cosmopolitan feel’ (gap of just 3%).

In short, the above results suggest greater exposure to the Penrith area (and therefore greater familiarity with the area) increases perceptions of Penrith being a ‘Vibrant/Progressive/Innovative/Attractive’ area as well as an area with ‘Good quality education facilities/Administrative facilities/Natural beauty’. However, increased exposure appears to have less impact on ‘Cultural/Cosmopolitan/Different from other metropolitan areas’ perceptions.

4 Appeal of Regions (Q4)

Finally, we asked respondents two questions to establish their overall disposition towards the Sydney areas they had previously written down. The first question asked them which, if any, of the areas were ‘Nice to live in’ and the second asked which, if any, were ‘Nice to work in’. Results for the total sample are summarised in Table 4a below:

		Penrith	Liverpool	Blacktown	Campbelltown	Baulkham Hills	Camden	None at all
4a. Nice area to live in	(n = 609) %	21	6	5	7	41	43	14
4b. Nice area to work in	(n = 609) %	24	16	15	11	26	21	25

Penrith appears to have a substantial advantage over Liverpool, Blacktown and Campbelltown when it comes to being perceived as an appealing area to live in and (to a lesser extent) work in.

However, Baulkham Hills and Camden have clearly outscored Penrith in terms of being a nice area to live in, and the three areas have scored on a par when it comes to being a nice area to work in (note that for both Camden and Baulkham Hills, their ‘Live in’ scores exceeded their ‘Work in’ scores, whereas the reverse was true for all other regions). Whilst this result may seem at odds with Penrith’s strong showing on the image statements in Question 3, it is not necessarily so:

- Camden and (to a lesser extent) Baulkham Hills generated predominantly positive comments on the unaided perception questions.
- It needs to be remembered that the image statements included in Q3 were those deemed important by Penrith Council – other regions may focus on other factors (which are valued by residents) and they may substantially outscore Penrith on those factors.
- On Table 3a we noted that Camden and Baulkham Hills both scored strongly on the ‘Attractive area’ statement (41% and 39% respectively, compared with 25% for Penrith). We hypothesised then that respondents may have interpreted ‘Attractive area’ more broadly than just physically attractive – perhaps they thought of it as meaning an area that would attract them. And the above results tend to support this hypothesis.

Adding further support to the hypothesis, as noted on Table 3a, Penrith scored well above Liverpool, Blacktown and Campbelltown on the ‘Attractive area’ statement, as it has done on the ‘Nice area to live in’ and ‘Nice area to work in’ statements reported in Table 4a above.

In short, Camden and Baulkham Hills may have been seen as more appealing places to live than Penrith, but Penrith appears to have a distinct advantage over its nearest western metropolitan neighbours, namely Liverpool, Blacktown and Campbelltown.

Table 4b below summarises the Penrith results cross-analysed by where respondents live:

Table 4b: Appeal of Penrith (Q4a,b) – By Respondent Region								
	Total Sample (n = 609) %	B’Hills/ B’town/ Liverpool Residents (n = 96) %	Campbell -town Residents (n = 60) %	Central/ Inner West Residents (n = 72) %	East/ South Residents (n = 77) %	North Residents (n = 76) %	Other West Residents (n = 76) %	Penrith Residents (n = 152) %
4a. Nice area to live in	21	21	15	21	16	18	20	59
4b. Nice area to work in	24	21	15	25	21	21	22	70

One of the surprising aspects of the above results is the relative consistency of scores across the sub-samples (ignoring the Penrith residents for the moment). The main exception is Campbelltown residents, who again gave Penrith the lowest scores, reflecting the generally lower scores they gave on the image statements (see Table 3c). Even the East/South and North residents gave higher scores for Penrith than did the Campbelltown residents.

Of course, the Penrith residents provided significantly higher scores for Penrith both in terms of being a place to live and a place to work. However, there does appear to be more of a preference amongst Penrith residents to think of their area as a place to work rather than a place to live. Whilst this may appear to be a concern, the same trend was evident across the other regions. Table 4c below analyses how residents of each area rated their *own* area (i.e.: the first column shows how the 152 Penrith residents rated Penrith, the second column shows how the 32 Liverpool residents rated Liverpool, and so on). Two points should be noted about this analysis:

- Some of the sample sizes are quite small (and are shown in red font).
- Camden is not included in this analysis as we did not interview any respondents in Camden (and hence we can’t see how Camden residents rated Camden).

Table 4c: Appeal of Regions (Q4a,b) – By Residents of each Region					
	Penrith Residents’ Rating of Penrith (n = 152) %	Liverpool Residents’ Rating of Liverpool (n = 32) %	Blacktown Residents’ Rating of Blacktown (n = 32) %	Campbelltown Residents’ Rating of Campbelltown (n = 60) %	Baulkham Hills Residents’ Rating of Baulkham Hills (n = 32) %
4a. Nice area to live in	59	38	34	23	88
4b. Nice area to work in	70	47	53	55	91

As can be seen, in all cases the local residents gave a higher ‘Work in’ score for their area (the differences are all relatively large except for Baulkham Hills).

Encouragingly, Penrith residents have been more favourable about their local area than have Liverpool, Blacktown and Campbelltown residents. However, the Baulkham Hills residents are the most committed to their local area both as a place to live and a place to work.

Finally, Table 4d below summarises the ratings of Penrith cross-analysed by how familiar respondents were with Penrith:

	Total Sample (n = 609) %	Know Penrith Very Well (n = 146) %	Know a Fair Amount about Penrith (n = 96) %	Subtotal – Know Well/ Fair Amount (n = 242) %	Know a Little about Penrith (n = 211) %	Have Heard of Penrith but Know Nothing (n = 146) %	Subtotal – Know Little/ Nothing (n = 357) %
4a. Nice area to live in	21	43	30	36	18	12	16
4b. Nice area to work in	24	46	32	38	23	14	19

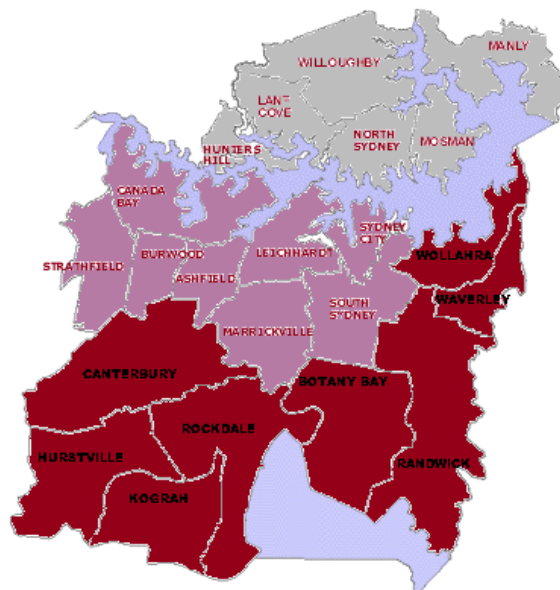
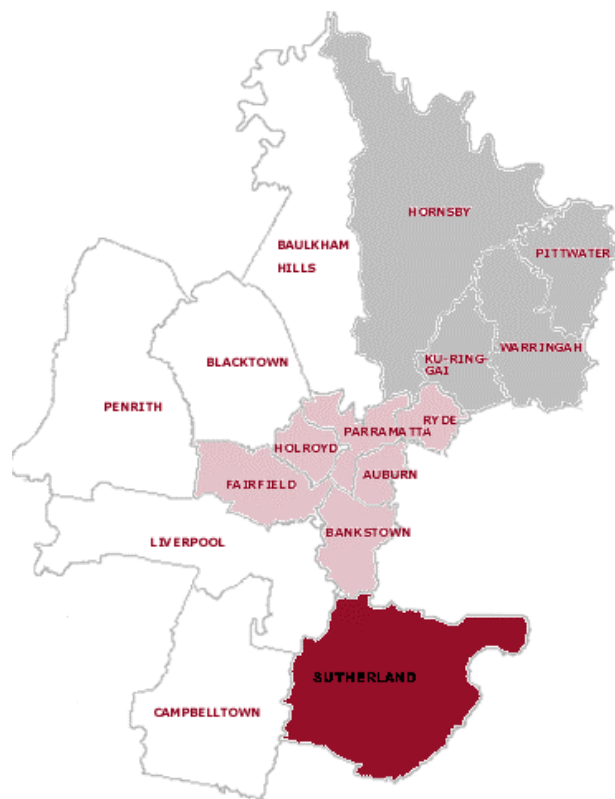
Encouragingly, those who are more familiar with Penrith were more inclined to indicate that it is a nice area to live and work in, suggesting that the more one knows about Penrith the more likely they are to say it is a nice place to live and work in. Whilst to some extent this is a truism (i.e.: you need to know about a place to rate it), greater familiarity does not guarantee **high** scores on these two measures. Table 4e below summarises the ratings per region by those who claimed to ‘Know the region very well’ or ‘Know a fair amount about it’:

	Those Who Know Penrith Rating of Penrith (n = 242) %	Those Who Know Liverpool Rating of Liverpool (n = 185) %	Those Who Know Blacktown Rating of Blacktown (n = 199) %	Those Who Know Campbelltown Rating of Campbelltown (n = 145) %	Those Who Know Baulkham Hills Rating of Baulk Hills (n = 154) %	Those Who Know Camden Rating of Camden (n = 103) %
4a. Nice area to live in	36	12	15	12	64	75
4b. Nice area to work in	39	26	26	22	53	48

As can be seen, on the ‘Live in’ question in particular, higher awareness of Liverpool/Blacktown/ Campbelltown has not generated particularly high ‘Live in’ scores, indicating that the relatively low scores for these regions are not the result of low awareness but more likely the outcome of an informed choice.

Technical Appendix 1

Definition of Regions Included in the Sample



- Central & Inner West
- East & South
- North
- Other West

CODE	LGA	POPULATION	% of TOTAL	SAMPLE	% of SAMPLE	WEIGHT	WEIGHT NO.
1	Baulkam Hills	146,644	4%	32	5%	0.77	25
2	Blacktown	266,072	7%	32	5%	1.39	45
3	Campbelltown	150,885	4%	60	10%	0.42	25
4	Central & Inner West	428,997	12%	72	12%	1.00	72
5	East & South	853,068	23%	77	13%	1.86	143
6	Liverpool	159,627	4%	32	5%	0.84	27
7	North	690,155	19%	76	12%	1.52	116
8	Other West	758,920	21%	76	12%	1.67	127
9	Penrith	178,405	5%	152	25%	0.20	30
	Total	3,632,773	100%	609	100%		609

Technical Appendix 2

The Questionnaire

Penrith City Council

Four Year Strategic Plan Research

November 2003

Day: Mon Tue Wed Thur Fri Sat Sun

Date: _____ / _____ / 2003

Respondent Name: _____

Telephone #: _____

Interviewer: _____

Interview #: _____

Suburb: _____

Sex: Male.....1 Female.....2

INTRODUCTION

Good morning/afternoon/evening, this is _____ from C&R Research in Sydney. Today we are conducting a short survey on people's awareness and impressions of different areas in Sydney.

May I speak to the youngest male aged 18 years or over who is currently at home please? [If no males] Then may I speak to the youngest female aged 18 years or over who is currently at home please?

[If a different person from the one who answered, re-introduce yourself] We'd really appreciate if you could spare a few minutes to answer several questions for us - would that be OK? Your answers will be treated with strict confidence and will be reported as part of group statistics.

If respondent agrees, mention they will need pen and paper (allow time to organise) and then proceed to Q1a. If respondent refuses, thank them and end the call.

FAMILIARITY AND IMPRESSIONS

Q1a. I'm now going to read out a short list of areas in Sydney. As I read each one, could you please tell me how familiar you personally are with it. The first place is _____ (Read out first place, starting at rotation mark). Would you say you [read out scale below]:

Know it very <u>well</u>	Know a fair amount <u>about it</u>	Know a little <u>about it</u>	Have heard of it but know <u>nothing about it</u>	Have never heard <u>of it</u>	[Don't Read] Don't <u>know</u>
--------------------------------	--	-------------------------------------	---	-------------------------------------	--------------------------------------

- *
 a. Liverpool and surrounding areas 1 2 3 4 5 6
 b. Blacktown and surrounding areas... 1 2 3 4 5 6
 c. Penrith and surrounding areas 1 2 3 4 5 6
 d. Campbelltown and surrounding areas ... 1 2 3 4 5 6
 e. Baulkham Hills and surrounding areas .. 1 2 3 4 5 6
 ▼ f. Camden and surrounding areas..... 1 2 3 4 5 6

Q1b. And the next place is _____ . Would you say you [read out scale above]:
 [Repeat for all other locations]

*

Q2a. [If Codes 1-4 on Q1a (i.e.: Aware of Liverpool), ask –Otherwise go to Q2b] What words or phrases would you use to describe Liverpool and its surrounding areas?

Don't know/Can't Say.....99

Q2b. [If Codes 1-4 on Q1b (i.e.: Aware of Blacktown), ask –Otherwise go to Q2c] What words or phrases would you use to describe Blacktown and its surrounding areas?

Don't know/Can't Say.....99

Q2c. [If Codes 1-4 on Q1c (i.e.: Aware of Penrith), ask –Otherwise go to Q2d] What words or phrases would you use to describe Penrith and its surrounding areas?

Don't know/Can't Say.....99

Q2d. [If Codes 1-4 on Q1d (i.e.: Aware of Campbelltown), ask –Otherwise go to Q2e] What words or phrases would you use to describe Campbelltown and its surrounding areas?

Don't know/Can't Say.....99

Q2e. [If Codes 1-4 on Q1e (i.e.: Aware of Baulkham Hills), ask –Otherwise go to Q2f] What words or phrases would you use to describe Baulkham Hills and its surrounding areas?

Don't know/Can't Say.....99

Q2f. [If Codes 1-4 on Q1f (i.e.: Aware of Camden), ask –Otherwise go to Q3] What words or phrases would you use to describe Camden and its surrounding areas?

Don't know/Can't Say.....99

Q3a. Using your pen and paper, please write down the names of the following area: “Liverpool and surrounding areas”, “Blacktown and surrounding areas”, “Penrith and surrounding areas”, “Campbelltown and surrounding areas”, “Baulkham Hills and surrounding areas” and “Camden and surrounding areas”.

I’m now going to read out some statements and for each one, I’d like you to tell me which of the areas you have written down, if any, the statement applies to. You can say one or more areas, or none at all. The first statement is [Read first statement below, starting at rotation mark]. Which of the areas you have written down, if any, do you think this statement applies to? (Circle for all mentions on appropriate line).

	<u>Liverpool</u>	<u>Blacktown</u>	<u>Penrith</u>	<u>Campbelltown</u>	<u>Baulkham Hills</u>	<u>Camden</u>	<u>None at all</u>
*							
a. Is a major economic centre.....	1	2	3	4	5	6	0
b. Is a major cultural centre.....	1	2	3	4	5	6	0
c. Is a major administrative centre	1	2	3	4	5	6	0
d. Is an innovative area.....	1	2	3	4	5	6	0
e. Is a vibrant area	1	2	3	4	5	6	0
f. Is an attractive area	1	2	3	4	5	6	0
g. Is different from other metropolitan areas in Sydney ...	1	2	3	4	5	6	0
h. Is an area that has natural beauty such as bush-land and waterways.....	1	2	3	4	5	6	0
i. Has a blend of urban and rural qualities	1	2	3	4	5	6	0
j. Is an area with a cosmopolitan feel.....	1	2	3	4	5	6	0
k. Is an area with a relaxed feel.....	1	2	3	4	5	6	0
l. Is a progressive area.....	1	2	3	4	5	6	0
m. Has good quality education facilities.....	1	2	3	4	5	6	0

Q3b. And the next statement is [read out next statement]. Which of those areas, if any, do you think this statement applies to?
[Repeat for all other statements]

Q4a. Which, if any, of the areas you have written down do you think would be nice to **live** in? When thinking about your answer, don’t consider whether you **could** actually live there – but rather, which areas, if any, **would** be **nice to live in**. (Circle one or more numbers on the first line below).

	<u>Liverpool</u>	<u>Blacktown</u>	<u>Penrith</u>	<u>Campbelltown</u>	<u>Baulkham Hills</u>	<u>Camden</u>	<u>None at all</u>
a. Nice area to live in.....	1	2	3	4	5	6	0
b. Nice area to work in.....	1	2	3	4	5	6	0

Q4b. And which, if any, of the areas you have written down do you think would be nice to **work** in? When thinking about your answer, don’t consider whether you **could** actually work there – but rather, which areas, if any, **would** be **nice to work in**. (Circle one or more numbers on the second line above).

DEMOGRAPHICS

Finally, some questions about you.

Q5. Which of the following best describes your current employment status....[Read out]

- Work full time 1
- Work part time/casual.....2
- Home duties3
- Student4
- Seeking employment5
- Retired6
- Other: _____7
- [Don't read] Refused8

Q6. What level of education have you completed? [Do not aid]

- Less than School Certificate or equivalent..... 1
- School Certificate or equivalent2
- Higher School Certificate or equivalent.....3
- Tertiary diploma/degree4
- Refused/don't know5

Q7. Are you the parent or guardian of any children aged 17 years or under?

- Yes 1
- No2
- Refused3

Q8. Which of the following best describes your present marital status? [Read out. Circle only one]

- Never married 1
- Defacto or live together2
- Married3
- Separated but not divorced4
- Divorced5
- Widowed.....6
- [Don't read] Refused7

Q9. Into which of the following age groups do you belong? [Read out. Circle only one].

- 18-20 1
- 21-242
- 25-293
- 30-344
- 35-395
- 40-446
- 45-497
- 50-598
- 60-699
- 70+10
- [Don't read] Refused 11

That's the end of the interview. As this is market research, it is carried out in compliance with the Privacy Act and the information you provided will be used only for research purposes.

Your answers will be combined with those of other participants to form statistical tables.

As part of our quality control procedures, someone from our office may wish to re-contact you to ask a couple of questions, verifying some of the information we just collected. Once the validation period has finished, please be assured that your name and contact details will be removed from your responses to this survey. After that time we will no longer be able to identify the responses provided by you. However, for the period that your name and contact details remain with your survey responses, which will be approximately one month, you will be able to contact us to request that we delete some or all of your information.

Record respondent's first name here (and on front page): _____

Thank you for your time. Just to remind you, I'm calling from C&R Research. (If respondent wants our number, it is 1800 80 7676).

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