



Australian Government
**Department of Infrastructure
and Regional Development**



Department of Infrastructure and Regional Development

***Western Sydney Airport Evaluation Research
February–March 2018 Survey***

Final Report

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1 Executive Summary

1.1. Background

The Strategic Communications and Engagement Section within the Western Sydney Unit (WSU) in the Department of Infrastructure, Regional Development and Cities is responsible for implementing the Western Sydney Airport Project Communications and Stakeholder Engagement Strategy (the Strategy).

WSU must continue to be agile and responsive to the community's needs and desire for information about the project, including preferences for how it is received. This will be especially important now that the construction of the airport will start in late 2018. WSU communication and engagement with stakeholders will be guided by a program of research conducted by AMR.

1.2. Research Objectives

Key objectives for the survey research were to:

- Understand current levels of awareness of and sources of information about Western Sydney Airport.
- Explore current levels of community perceptions towards the airport and identify perceived barriers and motivators towards a positive perception.
- Identify preferred (unpaid) channels for communication.

1.3. Research Method

Survey research had been conducted over the period November 2014 to December 2016 to evaluate communications activities, and understand awareness of and sentiment towards Western Sydney Airport among residents of Western Sydney. A new survey series was launched in May-June 2017 to continue the evaluative research process. The May-June 2017 benchmark wave was of 1,244 residents of Western Sydney, and included online and telephone survey methods to give a broad coverage of the area. A second wave in the new series was conducted in September-October 2017, with a sample of 615 residents; and a third wave was conducted in February-March 2018, with a sample of 613 residents.

Western Sydney was divided into four regions for analysis, based on pre-2016 local government areas:

- **South West** (Camden, Campbelltown, Liverpool, Wollondilly).
- **North West** (Baulkham Hills, Blacktown, Blue Mountains, Hawkesbury, Penrith).
- **Inner West** (Ashfield, Burwood, Canada Bay, Leichhardt, Marrickville, Strathfield).
- **West Central** (Auburn, Bankstown, Canterbury, Fairfield, Holroyd, Parramatta).

This report focuses on the results of the February-March 2018 survey wave, and tracking of measures.

1.4. Key Findings

Awareness of Western Sydney Airport

In February-March 2018, a large majority (87%) of Western Sydney residents had seen or heard something about the development of a new major airport, including close to half (47%) saying they had heard 'quite a lot' or 'a great deal' about it. This latter incidence was similar to the benchmark survey in May-June 2017 (48%), following a small decline in September-October 2017 (42%) which occurred particularly in South West region and North West region. This level of awareness was more likely to be reported by residents aged 55 years and over (61%), and least likely to be reported by residents in Inner West region (34%).

A key topic mentioned 'top of mind' as being seen or heard about the airport was confirmation of construction, particularly the location at Badgerys Creek, similar to the earlier two surveys. When prompted, the majority of those aware of the airport had heard that the site is in Western Sydney (75%), which had not changed significantly since the May-June 2017 benchmark; that the Australian Government is building the airport (51%), continuing a small decrease from the benchmark (57%); and that roads will be improved to support the new airport (53%).

Key channels in September-October 2017 reported as sources of information about the airport were mainstream media, including television news/current affairs programs (50%), printed newspaper articles (32%), and radio news/current affairs programs (27%); and 'word of mouth' (35%). Social media was mentioned by 17%, primarily Facebook. The Western Sydney Airport website was again nominated by less than one in ten (5%).

Nomination of several channels had decreased in September-October 2017 compared with the May-June 2017 benchmark, and the results in February-March 2018 recovered to be generally closer to the benchmark. The results suggest that ongoing coverage of further development of the airport has influenced an improvement in awareness in February-March 2018, particularly in South West region and North West region. The increase in awareness in Inner West region seen in September-October 2017, however, was not maintained.

Key measures of community sentiment

In February-March 2018, over half of residents of Western Sydney expressed positive sentiment towards the airport on key measures of *favourability* (60% agreeing) and *positive benefits outweighing any negative impact* (56% agreeing); with around one in ten holding a negative position on each. One-third (33%) expressed *concern about a negative impact* of building the airport, while two-fifths (40%) agreed with the *importance of 24/7 operation*.

Favourability

Three-fifths (60%) of Western Sydney residents in February-March 2018 were favourable to the new airport at Badgerys Creek. This result was below the average across May-June 2017 and September-October 2017 (65%), but maintained a marginal increase in favour compared with December 2016 (56%). Positive sentiment was also marginally higher in February-March 2018 compared with December 2016 in three of the regions: Inner West (66% vs. 58%), West Central (61% vs. 53%) and South West (61% vs. 56%); and was at a broadly similar level across the regions in February-March 2018 (56–66%). Positive sentiment towards benefits of Western Sydney Airport were found to be drivers of favourability, and the overall decrease in favourability was accompanied by decreases in agreement with several benefits.

The incidence of those unsure of their favourability remained relatively low in February-March 2018 (2%) compared with surveys across 2016 (ranging from 6% to 8%). Some of the relative increase in favourability since 2016 is likely therefore to have come from reaching a group that was previously less aware.

There was a similar profile of agreement with favourability across the regions in February-March 2018. Averaging the results of the two most recent surveys did, however, show some differences on disagreement, with residents of South West region and North West region marginally more likely to disagree (12–14%) compared with the other regions of (6–9%). The greatest favourability in February-March 2018 was among male residents, residents in the age groups 35-54 years and 55 years and over, and residents from culturally and linguistically diverse backgrounds.

Positive benefits

Over half (56%) of Western Sydney residents in February-March 2018 agreed that the positive benefits of the new airport will outweigh any negative impacts. This result was also below the average across May-June 2017 and September-October 2017 (61%), but maintained an increase in favour compared with December 2016 (49%). Positive sentiment had increased particularly in South West region (from 44% in December 2016 to 55% in February-March 2018) and West Central region (from 45% in December 2016 to 57% in February-March 2018); and was at a similar level across the regions in February-March 2018 (55-57%). Greater agreement in February-March 2018 was among male residents, and residents in the age groups 35-54 years and 55 years and over.

Concern about negative impact

In February-March 2018, residents were more divided on 'concern that building Western Sydney Airport will have a negative impact on Western Sydney' compared with the other key measures. The results were similar to May-June 2017 and September-October 2017. In the latest survey, one-third (33%) of residents agreed with the statement, expressing stronger concern; around one-third (32%) disagreed with the statement, expressing low concern; and the remainder (35%) were indecisive on the issue (neutral or unsure). The level of agreement in South West region (32%) and North West region (33%) remained below the relatively high results in December 2016 (42% and 40% respectively).

Importance of 24/7 operation

Agreement with the *importance of 24/7 operation* also decreased in February-March 2018 (40%) from the average of the earlier two surveys (46%), giving the lowest result of all surveys conducted since 2015. Over one-quarter (30%) of residents disagreed with the importance of 24/7 operation, but the community continued to show some indecision on the issue, with a similar proportion (30%) being either neutral or unsure of its importance.

Disagreement in the current wave was higher among older residents (43% for those aged 55 years and over, decreasing to 17% for those aged 18-34 years); female residents (40% vs. 17% for males); and residents not identifying with a culturally and linguistically diverse background (37% vs. 18% for those identifying). Disagreement was also highest in North West region (40% vs. 24-31% in the other three regions).

Perceived barriers and motivators

While the majority of residents in February-March 2018 continued to have a positive overall perception that benefits of the airport outweigh any negative impacts, there continue to be areas

of more concern to residents. This situation indicates an opportunity to provide more education and evidence about benefits and how areas of concern are being addressed.

Concerns

Areas of concern in February-March 2018 continued to include traffic, noise and other environmental impacts. Over half of residents expressed concern about several issues presented, similar to the May-June 2017 and September-October 2017 waves:

- increase in traffic both during construction (55%) and once running (56%)
- noise late at night and early in the morning if the airport operates 24 hours a day (56%)
- general noise pollution once running (56%).

There were no significant changes in overall levels of concern compared with the May-June 2017 and September-October 2017 waves.

Benefits

Key benefits of a new airport in Western Sydney that were acknowledged by three-fifths or more of residents in February-March 2018, as well as both waves in 2017, included economic gains for the area and Sydney's global competitiveness. There were declines for three measured benefits from the May-June 2017 benchmark (and which are also highlighted in the following list). Key benefits were that the airport:

- will bring jobs to the region (73% in February-March 2018)
- is needed to support the current airport at Mascot (64%, down from 71% in May-June 2017)
- is necessary to maintain and grow Sydney's global competitiveness (64%)
- will boost business and tourism in Western Sydney (62%, down from 72%)
- is necessary to support Western Sydney's growing population and economy (61%, down from 67% May-June 2017).

Significant decreases in February-March 2018 occurred most strongly in North West region.

Relationships with favourability of the airport

It was found that the ratings of the *benefits and improvements* associated with the airport were much more strongly related to favourability towards the airport compared with ratings of *noise/traffic/environmental issues* and *other concerns* about the impact of the airport. (See details in Section 4.2 under *Additional analysis of benefits, concerns and environmental impacts*, including Figure 10.)

Rail link

In February-March 2018, Western Sydney residents continued to have a strong interest in a rail link for the airport, with a large majority agreeing it should be: available from day one (79%), linked to Western Sydney suburbs (82%) and linked to the Sydney CBD (79%). There was some acknowledgement that the rail link should be based on demand for services (34% agreeing), although two-fifths disagreed, indicating a large minority more strongly considering that the rail link should be part of the initial development. Given the strong interest, the rationale for decisions related to rail should be addressed in communications.

Informing the community

The majority (60%) of Western Sydney residents in February-March 2018 continued to see it as important to be informed about progress of Western Sydney Airport, with one in ten (10%)

considering it of low importance. Consideration of importance was lowest in Inner West region (49%).

Among residents in the current wave perceiving some importance of being kept informed, the top four unpaid channels as sources of information about the airport's development included media coverage (nominated by 64%), a website dedicated to the airport (39%), local council (38%) and state government websites (37%). There had been a decline in nomination of several sources in September-October 2017, but results in February-March 2018 improved to similar levels in May-June 2017, possibly related to increased interest and attention to the topic as the airport development progresses.

While there is a moderately strong desire for a dedicated website (39%), the incidence of residents reporting having used the existing website as a source of information was low (5%).

1.5. Conclusions and Recommendations

The core recommendations from the May-June 2017 benchmark and September-October 2017 waves continue to be relevant following the February-March 2018 survey. These have been updated based on further developments on key measures.

Key findings	Recommendations
Understand current levels of awareness and sources of information for Western Sydney Airport	
<ul style="list-style-type: none"> The large majority of residents were aware of the airport, with recovery of reporting knowing at least 'quite a lot' after some decline earlier in 2018. There is scope to increase knowledge progressively and, importantly, to maintain knowledge, particularly as further developments in construction etc. occur. Overall knowledge was lower among residents aged under 55 years, and residents in Inner West region. Awareness continued to be strongest about the site being in Western Sydney, that the Australian Government is building the airport, and that roads will be improved to support the airport. The most common reported sources for information are mainstream media including television, print newspapers and radio; and 'word of mouth'. 	<ul style="list-style-type: none"> Utilising media releases and other promotional activity which can be reported in news programs and articles provides the potential to reach the general population effectively, and maintain awareness and knowledge of the airport development. Such activity can generate, and be built on, by 'word of mouth' communication. Communication should be enhanced to reach residents aged under 55 years, to improve overall knowledge about the airport. Awareness is strongest around the airport's location, and there is opportunity to improve knowledge about upgrades/improvements in Western Sydney and economic growth. Awareness of such a major infrastructure development can generate the expectation of hearing more information, particularly when changes start to occur, and there is an opportunity to build stronger positive sentiment and understanding of benefits.
Explore current levels of community perceptions of the airport	
<ul style="list-style-type: none"> There has been some decline in positive sentiment towards the new airport, including the level of favourability and benefits outweighing negative impacts compared with 2017. Agreement with the importance of the airport operating 24/7 has also decreased, and remains below earlier measures in 2015 and 	<p>FAVOURABILITY</p> <ul style="list-style-type: none"> Key groups to target, viewing the airport less favourably, include female residents and those aged 18-34 years. As noted under the next objective below, key areas to communicate are benefits and improvement to the economy and

<p>2016. Agreement continues to be relatively mixed on this issue with a significant minority undecided.</p> <ul style="list-style-type: none"> Strong interest and expectation for a rail link continues to be expressed, including operation from 'day one'. 	<p>infrastructure in Western Sydney, as well as broader benefits to Sydney.</p> <p>24/7 OPERATION</p> <ul style="list-style-type: none"> Key groups to target, viewing 24/7 operation as less important, include female residents, those aged 55 years and over, and those in North West region. Communications should include Information about the necessity of 24/7 operation, reasons for differing from the operation of Sydney Airport, and how issues associated with noise are being addressed. Consideration of 24/7 operation will be of greater relevance to future communications when flight paths are publicised. <p>RAIL LINK</p> <ul style="list-style-type: none"> Information about the implementation of a rail link should be communicated to residents, including the reasons for the path being taken.
<p>Identify the perceived barriers and motivators towards a positive perception of the airport</p>	
<ul style="list-style-type: none"> Western Sydney residents continue to have some concern that the airport will have a negative impact on the region. Key areas of concern continue to be associated with increase in traffic and noise, and other environmental impacts, both during and after construction. Key benefits continue to be economic gains for the area, including jobs and business/tourism, as well as Sydney's global competitiveness. Perceptions of the benefits and improvements to the economy and infrastructure are much more strongly related to being in favour of the airport than the environmental impacts. The small decline in overall favourability of the airport was accompanied by decline in a positive view of some benefits, including supporting a growing population and economy, and boosting business and tourism. 	<ul style="list-style-type: none"> Communications need to provide information about the expected benefits to the economy and infrastructure in the area, and to the broader benefits for Sydney, particularly based on results of similar infrastructure development. Key issues to address include those showing a decline in positive sentiment: how the airport will support a growing population and economy, how it will boost business and tourism, and how it will support Mascot airport. Communications should also include results of the final Environmental Impact Statement and other reports which provide factual, evidence-based information about impacts, and the steps being taken to address them.
<p>Identify preferred (unpaid) channels for communication</p>	
<ul style="list-style-type: none"> Television news/current affairs programs printed newspaper articles continue to be relatively strongly reported overall as media sources of information about the airport Local sources and social media are among the more common sources for residents aged 18-34 years. A dedicated airport website continues to be well-received as a source of information, but reported use continues to be very low. A second tier of preferred channels include state government websites, local councils and social media. 	<ul style="list-style-type: none"> There is some opportunity to build on sources that are more successfully providing recent information about the airport. For younger residents, these include some traditional sources (television news/current affairs), local sources and social media. A way to promote the website should be developed, potentially through social media or in co-operation with councils.

2 Background and Objectives

2.1. Study Context

The Strategic Communications and Engagement Section within the Western Sydney Unit (WSU) in the Department of Infrastructure, Regional Development and Cities is responsible for implementing the Western Sydney Airport Project Communications and Stakeholder Engagement Strategy (the Strategy). To this end, the section produces and is involved in the creation of a range of collateral and informative materials, such as information related to the Environmental Impact Statement and Airport Plan documents, factsheets, summary documents, newsletters, and other resources to engage the community. The section also manages Western Sydney Airport's online presence at www.westernsydneyairport.gov.au.

WSU's communications products for the project have continuously evolved and have been informed by regular interaction with the community and stakeholders. Formal analysis, in the form of research evaluating the communications strategy and messaging, has also allowed WSU to respond to changes in the community's communication needs, as well as find out what aspects about the project the community considers most important.

With the determination of the Western Sydney Airport Plan and the announcement that the Australian Government will deliver and invest in Western Sydney Airport, WSU's communications tasks continue to be guided by the Strategy.

WSU must continue to be agile and responsive to the community's needs and desire for information about the project, including preferences for how it is received. This will be especially important with construction of the airport starting in late 2018. WSU communication and engagement with stakeholders will be guided by a program of research conducted by AMR.

2.2. Research Objectives

This project is part of a program of enquiry conducted on behalf of WSU to provide evaluative research at regular intervals. It will track the effectiveness of WSU communications and assess its performance and effectiveness regarding the continuing development of Western Sydney Airport. This particular quantitative project aims to provide the WSU with an understanding of community attitudes within the broader Western Sydney area.

The two key research objectives for the survey are as follows:

- Understand current levels of awareness of and sources of information about Western Sydney Airport.
- Explore current levels of community perceptions towards the airport and identify perceived barriers and motivators towards a positive perception.

3 Research Method

3.1. Research Design

The method for the current series of surveys, starting in May-June 2017, was based on the five tracking surveys conducted earlier between November 2014 and December 2016. With the progress in the development of Western Sydney Airport since the December 2016 wave, including the announcement of the Australian Government's commitment to deliver and invest in the Airport, changes were made to the method for the current series. The objectives of the changes were to give a more robust coverage and facilitate the evolution of the questionnaire to cover the current state of the airport's development.

The February-March 2018 survey was the third wave in the current series, following the benchmark survey in May-June 2017 and a second wave in September-October 2017. The February-March 2018 wave had a sample target of 600, and a final sample of 615. The marginally higher final sample was a result of additional surveys being completed to meet some specific quotas by region, age group and gender.

3.2. Target Audience

The primary target audience was residents living within the Western Sydney area. The area was divided into four regions based on Local Government Areas (LGAs). Each LGA was in turn defined by postcode, based on the LGA accounting for the greatest share of population in the postcode.

Table 1: Western Sydney Regions and Local Government Areas for the May-June 2017, September-October 2017 and February-March 2018 surveys

Region	Local Government Area (pre 2017 definition)	Notes on new inclusions
South West	Camden Campbelltown Liverpool Wollondilly	
Inner West	Ashfield Burwood Canada Bay Leichhardt Marrickville Strathfield	Included due to incorporation into Inner West Council
North West	Baulkham Hills Blacktown Blue Mountains Hawkesbury Penrith	
West Central	Auburn Bankstown Canterbury Fairfield Holroyd Parramatta	Included due to merger with Bankstown Maintained in West Central

While there have been mergers and re-defining of boundaries for several LGAs, the Australian Bureau of Statistics currently provides population data based on the earlier boundaries and definitions.

The assignment of LGAs to Regions is shown in Table 1. The Regions are broadly similar to those used in the earlier survey series with the following changes:

- Marrickville is now included in Inner West region, as it is now part of the new Inner West Council
- Canterbury is now included in West Central region, as it is now merged with Bankstown.

3.3. Sampling and Weighting

Quotas for the February-March 2018 survey were set by age, gender and region. The sampling was set overall to equal targets of 150 per region, to allow for more consistent levels of precision of results for each region when making comparisons. The final survey sample was post-weighted to the population based on age, gender and region, as well as maintaining an incidence of 30% identified from culturally and linguistically diverse communities.¹

The survey is of a sample of residents in Western Sydney. As it is a sample of the population, a survey result is an *estimate* of the population result, with a degree of uncertainty. This degree of uncertainty is referred to as a *margin of error*. The margin of error is typically represented through a 95% confidence interval. This means that the *true population result* will fall into the confidence intervals of 95% of random survey samples of the same size. Examples of confidence intervals based on total survey size are:²

- for a survey sample of 1,200, and a survey result of 50%, the 95% confidence interval is $\pm 2.9\%$
- the corresponding interval for a sample of 600 is $\pm 4.1\%$
- the corresponding interval for a sample of 500 is $\pm 4.5\%$.

Additional confidence intervals are shown for reference in the Appendix to this report.

3.4. Questionnaire

The questionnaire for the current survey series was updated to cover current developments around the Western Sydney Airport project and areas of communication, as well as attending to sequencing and flow for respondents. The questionnaire covered:

- awareness and understanding of the Western Sydney Airport development
- sources of information and awareness
- attitudes and opinions of the Western Sydney Airport development
- attitudes towards surrounding infrastructure development
- information seeking behaviour and preferred channels for communication
- demographics.

¹ It should be noted that in telephone and online surveys respondents from culturally and linguistically diverse communities tend to be younger than other respondents, and differences in survey results associated with these residents have been assessed further by taking age into account in the statistical analysis.

² The weighting of the survey data has a potential impact on the precision of the results and this has been taken into account in the statistical tests through utilising the effective sample size.

3.5. Results and Comparisons

Presentation of survey waves

Some key measures are shown for both the earlier survey series and the current series (e.g., Table 5). In other charts and tables, results from the February-March 2018 survey are presented as the main results.

Comparisons with earlier waves in the current series (the May-June 2017 benchmark and the September-October 2017 tracking wave) are generally included as additional columns in charts (e.g., Figure 1). More detailed comparisons of results for each region use abbreviations in table columns for clarity (e.g., Table 22) as described in Table 2.

Table 2: Presentation of survey waves

Wave	Main descriptor	Abbreviation in some tables and charts
Benchmark wave	May-June 2017	BW
Wave 2	September-October 2017	W2
Wave 3	February-March 2018	(no additional abbreviation used)

Tests of statistical significance

Tests of statistical significance have been conducted to measure differences between waves, and within demographic sub-groups (e.g., males vs. females) on key questions. Statistically significant differences are presented in the tables and relevant charts through highlighting of results that are higher or lower than expected:

- higher result and lower result.

The tests are applied to all sub-groups or waves for each result in a particular data set. Examples are comparisons between:

- the four regions in Table 4, for each type of engagement
- the eight survey waves in Table 5, for each rating category
- males and females in Table 6, for each rating category
- the four most recent survey waves in Figure 3, for each demographic sub-group
- the three survey waves in the current series in Figure 7 and Figure 9 for a rating for each category.

In a number of cases where there are three or more sub-groups only one result might be highlighted (e.g., 'None of these' in Table 4 highlighted as higher). This situation would generally mean that the results for the other sub-groups *as a pool*, but *not individually*, would be statistically significant in the opposing direction (in this case, lower).

Rounding

There can be a rounding error of $\pm 1\%$ when adding two or more percentage results, such as when adding the column of results for February-March 2018 in Table 7. The four results add to 101% rather than 100% due to rounding.

3.6. Sample Profile

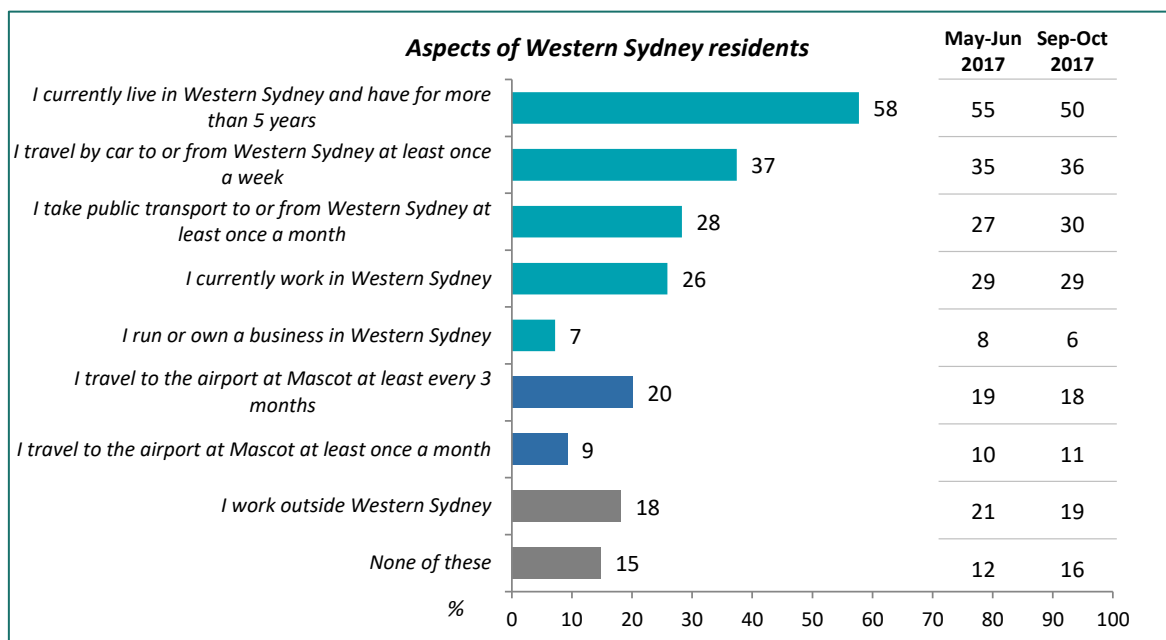
Table 3 outlines the unweighted demographic breakdown of the February-March 2018 sample.

Table 3: Sample profile, unweighted (Feb-Mar 2018)

Variable	Profile	Total	
		%	n
Total	All	100	613
Gender	Male	50	305
	Female	50	308
Age	18-34	34	207
	35-54	33	204
	55+	33	202
Region	South West	24	150
	Inner West	25	151
	North West	25	155
	West Central	26	157
Culturally and Linguistically Diverse Background	Yes	28	170
	No	71	436
	<i>Prefer not to say/Unsure</i>	1	7
Aboriginal and/or Torres Strait Islander	Yes	1	4
	No	94	574
	<i>Prefer not to say/Unsure</i>	6	35
Education	Completed some high school	8	50
	High school graduate	18	108
	Technical college / TAFE	26	157
	Undergraduate degree	29	175
	Postgraduate degree	17	105
	<i>Prefer not to say</i>	3	18
Employment	Work full-time (≥35 hours per week)	41	252
	Work part-time (<35 hours per week)	17	104
	Self-employed	4	25
	Retired	17	103
	In full time education	4	22
	Full time home / house duties	7	43
	Receiving government allowance	1	6
	Not currently employed	5	30
	<i>Prefer not to say</i>	5	28
Household Income	<\$40k	16	97
	\$40,000 - \$64,999	11	70
	\$65,000 - \$79,999	8	50
	\$80,000 - \$99,999	11	69
	\$100,000 - \$119,999	11	69
	\$120k+	17	106
	<i>Prefer not to say/Unsure</i>	25	152
Marital Status	Registered married	53	322
	De facto/cohabiting relationship	11	68
	Not married	33	201
	<i>Prefer not to say</i>	4	22
Parental Status	Children	30	185
	No Children	68	414
	<i>Prefer not to say</i>	2	14

Residents were asked a series of questions about their living, working and traveling arrangements in Western Sydney as well as their usage of the Sydney Airport (Figure 1).

Figure 1: Aspects of Western Sydney residents and Sydney Airport usage (Feb-Mar 2018, and comparison with May-Jun 2017 and Sep-Oct 2017)



Q17. Which of the following applies to you? Please select all that apply.
Base: All (Feb-Mar 18, n=613; Sep-Oct 17, n=615; May-Jun 17, n=1,244)

As in the previous two waves, residents in Inner West region in February-March 2018 were less likely to identify with aspects of the Western Sydney area compared to other regions (Table 4). They were also more likely to be Sydney Airport users or not identify with any of the descriptions.

Table 4: Aspects of Western Sydney residents by region (Feb-Mar 2018)

Aspects	TOTAL	Region			
		South West	Inner West	North West	West Central
	%	%	%	%	%
I currently live in Western Sydney and have for more than 5 years	58	65	18	68	60
I travel by car to or from Western Sydney at least once a week	37	39	18	44	39
I take public transport to or from Western Sydney at least once a month	28	25	19	29	33
I currently work in Western Sydney	26	29	12	32	25
I run or own a business in Western Sydney	7	7	2	10	7
I travel to the airport at Mascot at least every 3 months	20	20	23	18	21
I travel to the airport at Mascot at least once a month	9	8	8	7	12
I work outside Western Sydney	18	20	25	15	17
None of these	15	14	29	11	13
Sample size	613	150	151	155	157

Q17. Which of the following applies to you? Please select all that apply.
Base: All (n=613)
Shading highlights statistically significantly **higher** and **lower** results

4 Key Measures

4.1. Sentiment

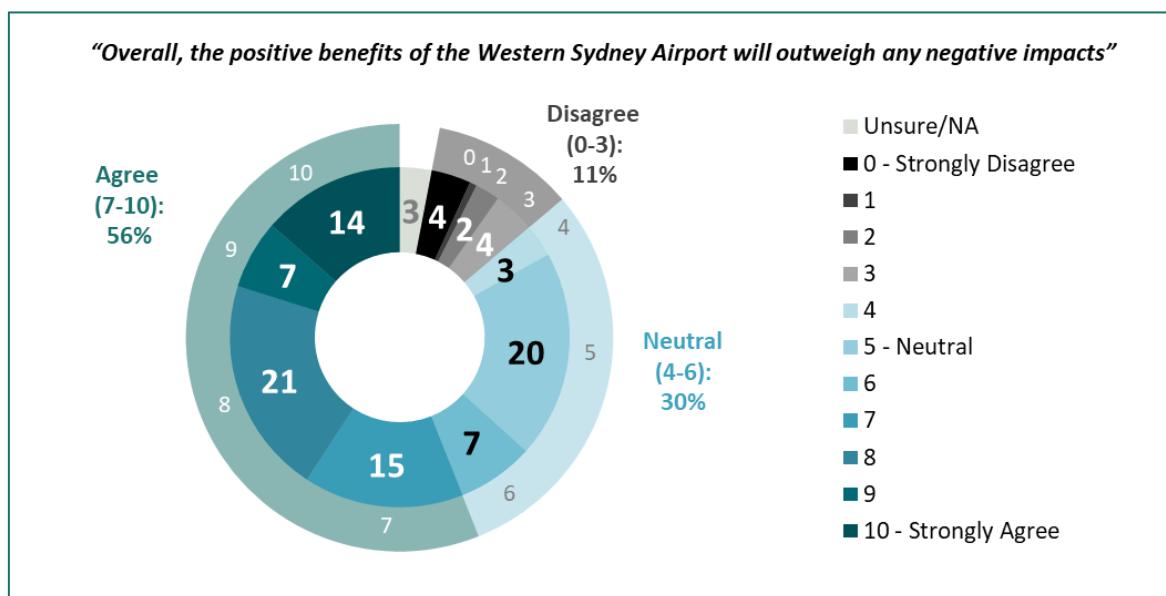
Measures of Sentiment

Sentiment towards the new Western Sydney Airport development at Badgerys Creek was measured through two key questions: perception that the overall benefits outweigh any negative impacts; and favourability of the development.

Perception that the overall benefits outweigh any negative impacts

In February-March 2018, the majority (56%) of Western Sydney residents agreed (rating 7-10) with the statement that overall benefits of the new airport development outweigh any negative impact (Figure 2). This result was slightly lower than in May-June 2017 (60%) and September-October 2017 (63%), while maintaining an increase over results from surveys in 2016 (48-49%) (Table 5).

Figure 2: Perception of overall benefits of Western Sydney Airport vs. negative impacts (Feb-Mar 2018)



Q7. Using a scale of 0 to 10, where 0 means strongly disagree and 10 means strongly agree, to what extent do you agree or disagree with the following statement? “Overall, the positive benefits of Western Sydney Airport at Badgerys Creek would outweigh any negative impacts.”

Base: All (n=613)

Table 5: Perception of overall benefits of Western Sydney Airport vs. negative impacts (Nov 2014 to Feb-Mar 2018)

Agreement	Overall, positive benefits of Western Sydney Airport will outweigh any negative impacts								
	FIRST BENCHMARK November 2014	June 2015	December 2015	April 2016	August 2016	December 2016	NEW BENCHMARK May-June 2017	Sep-Oct 2017	Feb-Mar 2018
Rated 0-10	%	%	%	%	%	%	%	%	%
0-3 Disagree	11	14	11	11	12	12	8	8	11
4-6 Neutral	30	30	30	32	32	31	29	25	30
7-10 Agree	49	49	52	49	48	49	60	63	56
Don't know	10	7	7	8	8	8	2	4	3
Sample size	501	513	502	499	505	503	1244	615	613

Q7. Using a scale of 0 to 10, where 0 means strongly disagree and 10 means strongly agree, to what extent do you agree or disagree with: “Overall, the positive benefits of the Western Sydney Airport at Badgerys Creek would outweigh any negative impacts”

Base: All (n=499-1,244)

Shading highlights statistically significantly higher and lower results

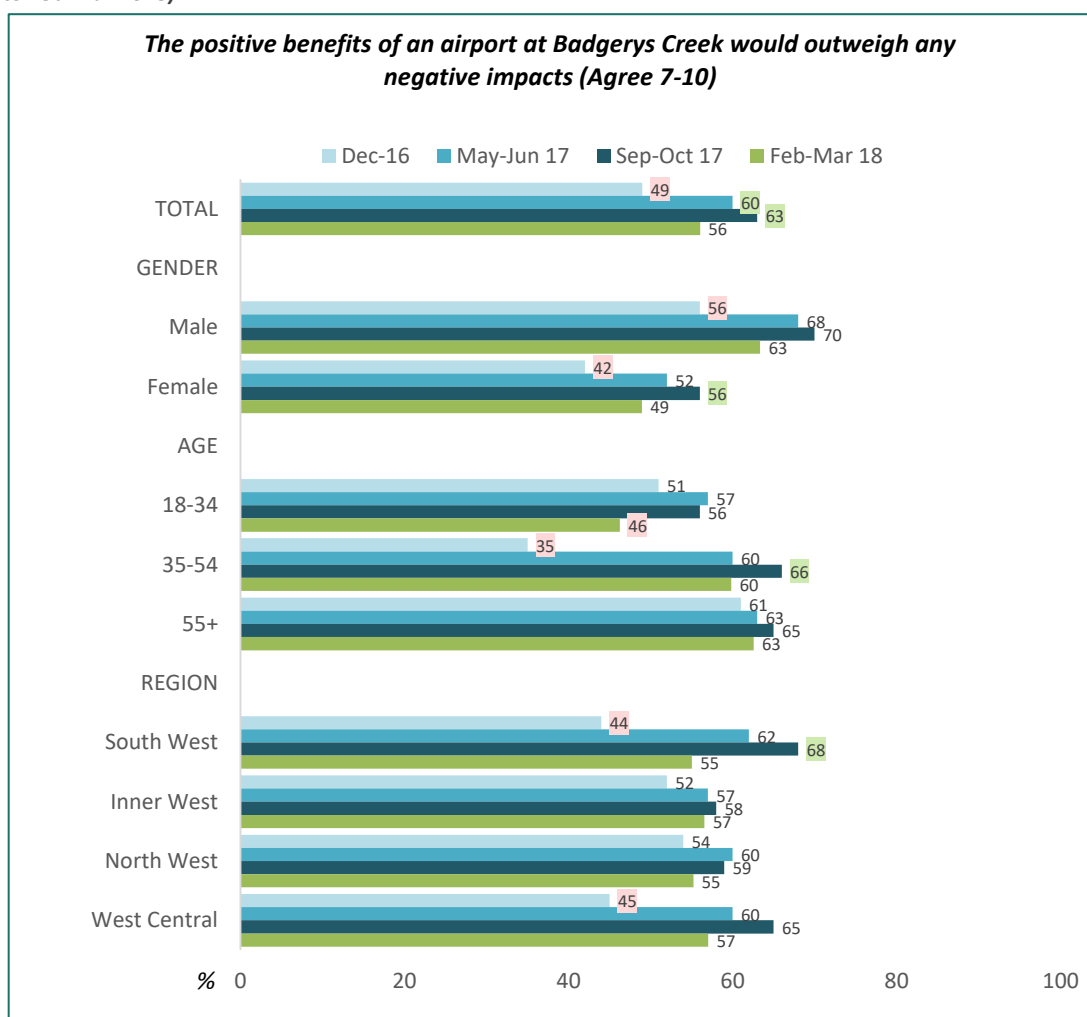
Compared with the previous wave, there were commensurate marginal increases in February-March 2018 in a neutral position (rating 4-6, from 25% to 30%) and in disagreement (rating 0-3, from 8% to 11%) (Table 5). The increase in agreement in the previous two waves followed the announcement in the May 2017 Federal budget that the Australian Government would deliver the airport.

Table 6: Perception of overall benefits of Western Sydney Airport vs. negative impacts, by demographics (Feb-Mar 2018)

Agreement	TOTAL	Gender		Age			Region				Culturally and Linguistically Diverse	
		Male	Female	18-34	35-54	55+	South West	Inner West	North West	West Central	Yes	No
Rated 0-10	%	%	%	%	%	%	%	%	%	%	%	%
0-3 Disagree	11	9	13	11	9	12	10	9	13	10	6	13
4-6 Neutral	30	24	36	39	28	23	32	31	28	31	32	29
7-10 Agree	56	63	49	46	60	63	55	57	55	57	60	54
Unsure	3	4	2	4	3	2	2	3	4	2	2	3
Sample size	613	305	308	207	204	202	150	151	155	157	170	436

Q7. Agreement: "Overall, the positive benefits of the Western Sydney Airport at Badgerys Creek would outweigh any negative impacts"
Base: All (n=613) Shading highlights statistically significantly higher and lower results between groups

Figure 3: Perception of overall benefits of Western Sydney Airport vs. negative impacts, by demographics (Dec 2016 to Feb-Mar 2018)



Q7. Agreement: "Overall, the positive benefits of the Western Sydney Airport at Badgerys Creek would outweigh any negative impacts"
Base: All (n=613)
Shading highlights statistically significantly higher and lower results between waves

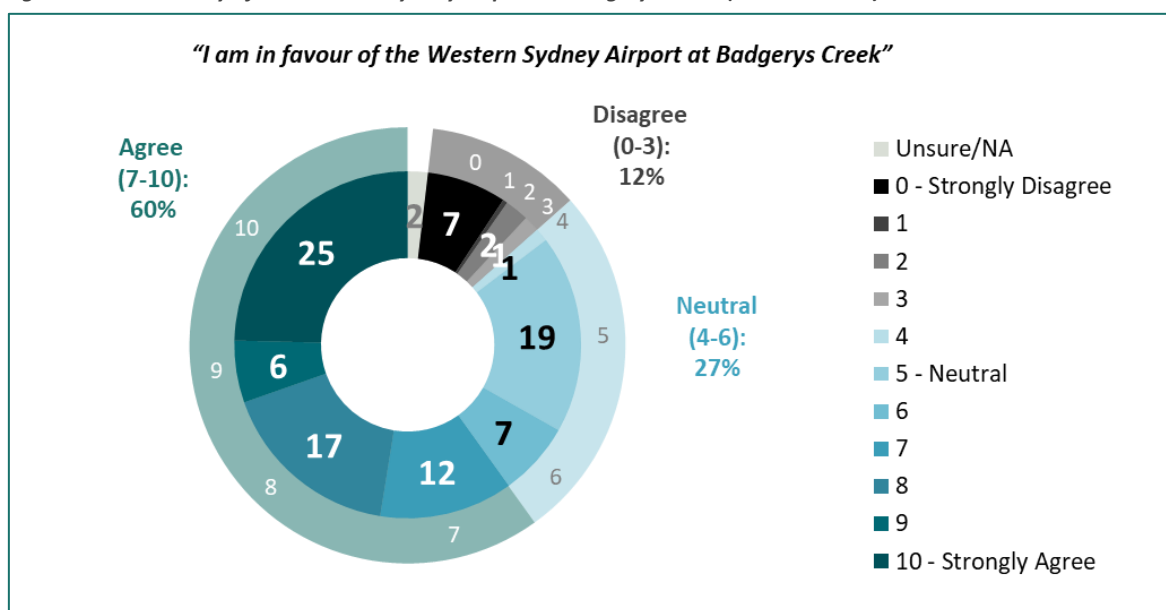
Across the demographic groups, agreement with the proposition continued to be stronger among males (63% agreeing) than females (49%), with a corresponding main difference on the neutral position (24% vs. 36% respectively), rather than disagreement (Table 6). Among the age groups, the younger 18-34 year old group to be least likely to agree (46%) compared with the older groups (60% and 63%) and were also most likely to be neutral (39%, compared with 28% and 23%). The results were relatively similar between the regions.

Comparing the waves by demographics shows that the decrease in agreement in February-March 2018 compared with September-October 2017 occurred among both male and female residents, and residents aged 18-34 years (Figure 3). There were also downward trends in both South West region (where the development site is located) and West Central region, resulting in a similar result across the four regions (ranging over 55% to 57% in February-March 2018). The level of agreement in both these regions, however, maintained an increase over the relatively lower results in December 2016.

Favourability of the Western Sydney Airport at Badgerys Creek

The second key measure of sentiment was about whether residents were in favour of the Western Sydney Airport at Badgerys Creek. In February-March 2018, three-fifths (60%) of residents were in favour (rating 7-10) (Figure 4). This result was also below the relatively high results in May-June 2017 (67%) and September-October 2017 (64%), but remained marginally above results in 2016 when less than three-fifths agreed (56-57%) (Table 7).

Figure 4: Favourability of the Western Sydney Airport at Badgerys Creek (Feb-Mar 2018)



Q13. Using a scale of 0 to 10, where 0 means strongly disagree and 10 means strongly agree, to what extent do you agree or disagree with the following statement? "I am in favour of the Western Sydney Airport at Badgerys Creek"
Base: All (n=613)

The incidence of those unsure remained relatively low in February-March 2018 (2%), similar to the previous two surveys (1% and 3% respectively), and remaining below results in 2016 (ranging from 6% to 8%). Some of the relative increase in favourability since 2016 is likely therefore to have come from reaching a group that was previously less aware.

Table 7: Favourability of the Western Sydney Airport at Badgerys Creek by waves (Nov 2014 to Feb-Mar 2018)

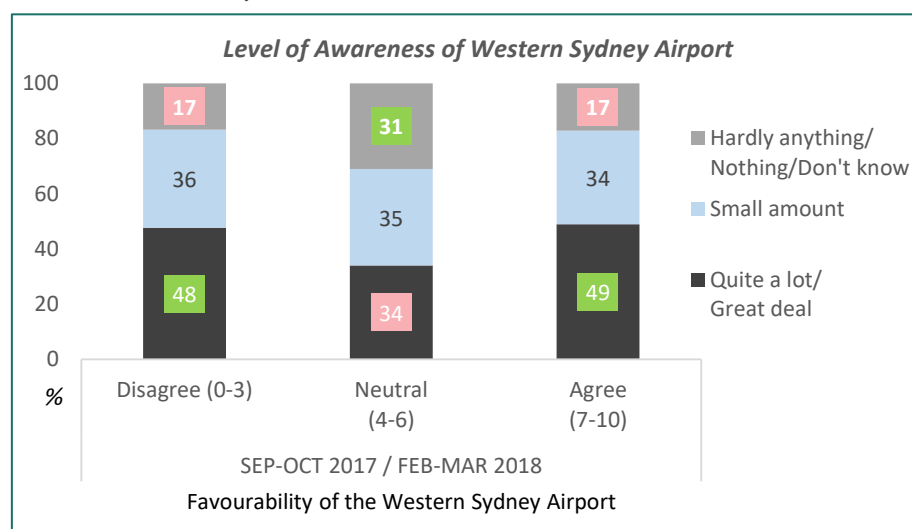
Sentiment towards the airport									
Agreement	FIRST BENCHMARK November 2014	June 2015	December 2015	April 2016	August 2016	December 2016	NEW BENCHMARK May-June 2017	Sep-Oct 2017	Feb-Mar 2018
Rated 0-10	%	%	%	%	%	%	%	%	%
0-3 Disagree	12	12	8	12	12	11	10	9	12
4-6 Neutral	28	25	25	25	26	25	22	24	27
7-10 Agree	54	56	61	57	56	56	67	64	60
Don't know	6	7	6	6	6	8	1	3	2
Sample size	501	513	502	499	505	503	1,244	615	613

Q13. Using a scale of 0 to 10, where 0 means strongly disagree and 10 means strongly agree, to what extent do you agree or disagree with the following statement? "I am in favour of the Western Sydney Airport at Badgerys Creek"

Base: All (n=501-1244)

Shading highlights statistically significantly **higher** and **lower** results between waves

There has been a pattern in the current survey series—May-June 2017, September-October 2017 and February-March 2018—for knowledge of the airport to be lower among residents *neutral* about favourability, compared with residents expressing *high* or *low* favourability. This pattern suggests that increasing knowledge of the airport particularly among neutral residents can lead to polarising of perceptions, and is illustrated below for the average of the September-October 2017 and February-March 2018 surveys (*neutral* – 34% know 'quite a lot/great deal' vs. *disagree* – 48% and *agree* – 49%) (Figure 5).

Figure 5: Level of awareness of the Western Sydney Airport at Badgerys Creek, by favourability (average of Sep-Oct 2017 and Feb-Mar 2018)

Q13. Using a scale of 0 to 10, where 0 means strongly disagree and 10 means strongly agree, to what extent do you agree or disagree with the following statement? "I am in favour of the Western Sydney Airport at Badgerys Creek"

Q1. Before today, have you seen, heard or read anything about the development of a new major airport in Sydney?

Base: All (September-October 2017, n=615, September-October 2017, n=613)

Shading highlights statistically significantly **higher** and **lower** results between waves

There were some significant differences measured between the demographic groups on favourability of the airport in February-March 2018 (Table 8). The main differences were for:

- the younger 18-34 year old group to be least likely to hold a favourable sentiment (52% agreeing vs. 64% to 65% for the other age groups) and more likely to hold a neutral sentiment
- male residents (67%) to rate more favourably than female residents (53%)
- residents from culturally and linguistically diverse communities to be more favourable (69% vs. 57% for other residents), which was confirmed when taking age into account.

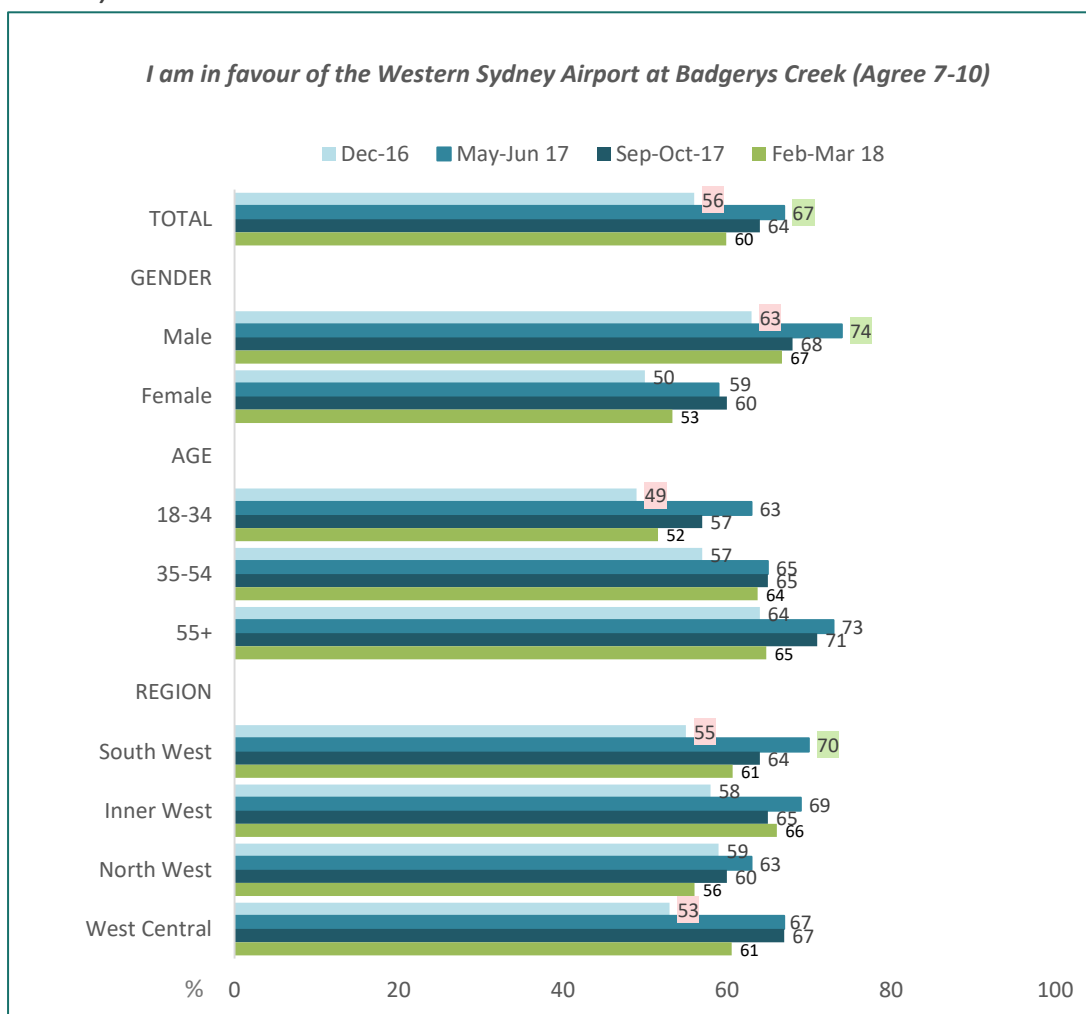
Table 8: Favourability of the Western Sydney Airport at Badgerys Creek, by demographics (Feb-Mar 2018)

Agreement	TOTAL	Gender		Age			Region				Culturally and Linguistically Diverse	
		Male	Female	18-34	35-54	55+	South West	Inner West	North West	West Central	Yes	No
Rated 0-10	%	%	%	%	%	%	%	%	%	%	%	%
0-3 Disagree	12	9	14	10	11	14	15	5	14	10	7	14
4-6 Neutral	27	22	31	36	22	21	22	27	28	28	24	28
7-10 Agree	60	67	53	52	64	65	61	66	56	61	69	57
Unsure/NA	2	2	2	3	3	0	2	1	3	1	1	2
Sample size	613	305	308	207	204	202	150	151	155	157	170	436

Q13. Using a scale of 0 to 10, where 0 means strongly disagree and 10 means strongly agree, to what extent do you agree or disagree with the following statement? "I am in favour of the Western Sydney Airport at Badgerys Creek"

Base: All (n=613) Shading highlights statistically significantly higher and lower results

Comparing the waves from December 2016 onwards shows substantial improvement in favourability in May-June 2017 (from 56% up to 67% overall) followed by a decline through to February-March 2018 (60%), remaining marginally above the December 2016 result (Figure 6). This pattern of improvement and decline was seen for most demographic groups. The results in February-March 2018 were broadly similar across the regions, with no significant differences overall.

Figure 6: Favourability of the Western Sydney Airport at Badgerys Creek, by demographics (December 2016 to Feb-Mar 2018)

Q13. Using a scale of 0 to 10, where 0 means strongly disagree and 10 means strongly agree, to what extent do you agree or disagree with the following statement? "I am in favour of the Western Sydney Airport at Badgerys Creek"

Base: All (n=503-1,244)

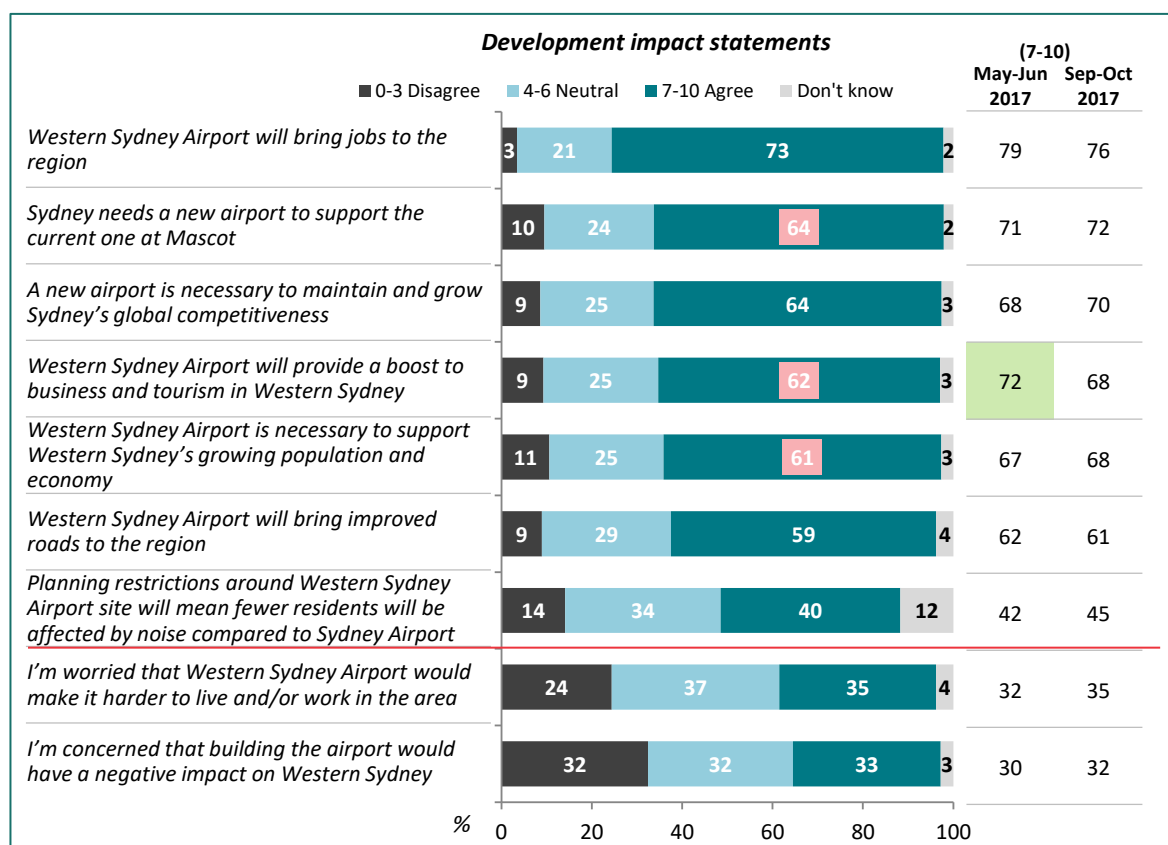
Shading highlights statistically significantly higher and lower results between waves

4.2. Perceived Benefits and Concerns

Perceptions of needs, benefits and impacts

Perceptions were measured on a range of needs, benefits and concerns around the development of Western Sydney Airport. There was some decline in February-March 2018 in a positive perception of three of the statements compared with both May-June 2017 and September-October 2017.

Figure 7: Perception of impacts of Western Sydney Airport development (Feb-Mar 2018, and comparison with May-Jun 2017 and Sep-Oct 2017 on 'agreement')



Q8. Using the same scale where 0 means strongly disagree and 10 means strongly agree, to what extent do you agree or disagree with the statement below?

Base: All (Feb-Mar 18, n=613, Sep-Oct 17, n=615; May-Jun 17, n=1,244)

Shading highlights statistically significantly higher and lower results between waves

In February-March 2018, around three-quarters (73%) of residents continued to agree (rating 7-10) that the airport will 'bring jobs to the region'. Other benefits specifically to Western Sydney, with over half agreeing, included 'boost to business and tourism in Western Sydney' (62%), 'necessary to support Western Sydney's growing population and economy' (61%) and 'improved roads to the region' (59%). A similar level of support was evident for broader benefits to Sydney, including needing the new airport to 'support the current airport at Mascot' (64%) and 'maintain and grow Sydney's global competitiveness' (64%). There had, however, been a decline in agreement with three of these benefits:

- 'boost to business and tourism in Western Sydney' (from 72% in May-June 2017 to 62%)
- 'needing the new airport to 'support the current airport at Mascot' (from 71% to 64%)
- 'necessary to support Western Sydney's growing population and economy' (from 67% to 61%).

Agreement in February-March 2018 continued to be lower for a perception that fewer residents will be affected by noise compared with Mascot (40%), with close to half (46%) neutral or unsure.

There also continued to be greater polarisation on perception of concerns about building the airport, with relatively higher disagreement (rating 0-3), including (Figure 7):

- making it 'harder to live and/or work in the area' (35% agree, 24% disagree)
- having 'a negative impact on Western Sydney' (33% agree, 32% disagree).

There was no significant change in agreement with these concerns compared with May-June 2017 and September-October 2017.

Tracking the key perception of concern that building the airport will have a negative impact on Western Sydney showed that the increase in disagreement (rating 0-3) observed in May-June 2017 (from an average of 24% in 2016 to 34%) has been maintained through to February-March 2018 (32%) (Table 9). The increase had been accompanied by some decrease in both agreement and a neutral position.

Table 9: Concern that building the airport would have a negative impact on Western Sydney, by waves (Nov 2014 to Feb-Mar 2018)

Concern about the negative impact building the airport would have on Western Sydney									
Agreement	November 2014	June 2015	December 2015	April 2016	August 2016	December 2016	New Benchmark May-Jun 2017	Sep-Oct 2017	Feb-Mar 2018
<i>Rated 0-10</i>	%	%	%	%	%	%	%	%	%
0-3 Disagree	25	22	21	24	23	25	34	33	32
4-6 Neutral	37	38	41	35	38	32	34	33	32
7-10 Agree	33	36	34	37	35	36	30	32	33
Don't know	5	4	4	4	4	6	2	2	3
Sample size	501	513	502	499	505	503	1244	615	613

Q8. Using the same scale where 0 means strongly disagree and 10 means strongly agree, to what extent do you agree or disagree with the statement below?

Base: All (n=501-1,244)

Shading highlights statistically significantly **higher** and **lower** results between waves

Looking at the demographic breakdown, the main differences in February-March 2018 were for greater disagreement among residents aged 55 years and older (42%) reducing with age to be lowest among residents aged 18-34 years (22%); and greater neutrality among female residents (36% vs. 28% for males), with a corresponding lower level mainly of disagreement Table 10).

Table 10: Concern that building the airport would have a negative impact on Western Sydney, by demographics (Feb-Mar 2018)

Agreement	TOTAL	Gender		Age			Region				Culturally and Linguistically Diverse	
		Male	Female	18-34	35-54	55+	South West	Inner West	North West	West Central	Yes	No
<i>Rated 0-10</i>	%	%	%	%	%	%	%	%	%	%	%	%
0-3 Disagree	32	36	29	22	35	42	40	38	33	26	30	34
4-6 Neutral	32	28	36	40	28	28	27	31	29	38	37	30
7-10 Agree	33	32	33	34	34	29	32	30	33	34	31	33
Unsure/NA	3	4	2	5	3	1	1	1	5	3	2	3
Sample size	613	305	308	207	204	202	150	151	155	157	170	436

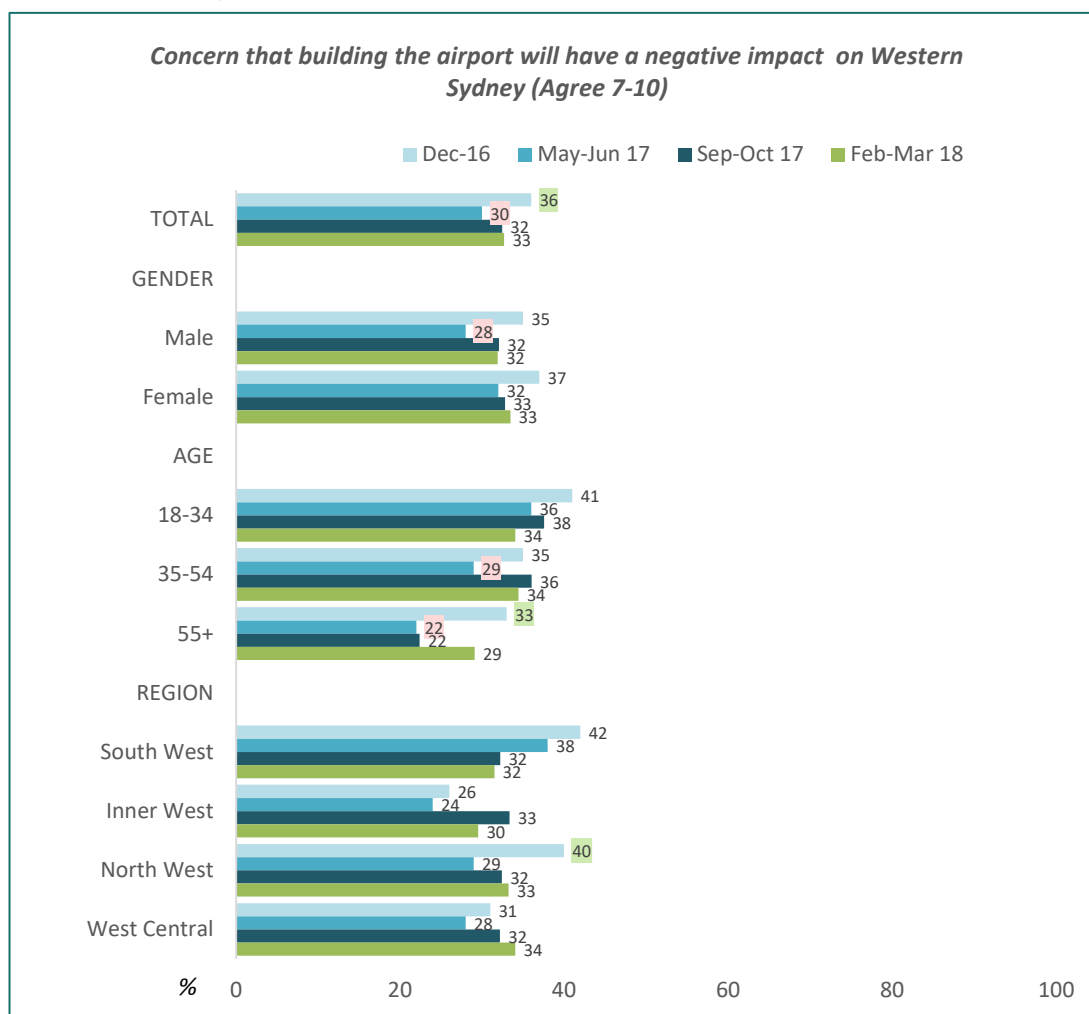
Q8. Using the same scale where 0 means strongly disagree and 10 means strongly agree, to what extent do you agree or disagree with the statement below?

Base: All (n=613)

Shading highlights statistically significantly **higher** and **lower** results between groups

In February-March 2018 there was uniformity in concern across the regions about an overall negative impact (a range of agreement from 30% to 34%), similar to September-October 2017 (32% to 33%). This uniformity was influenced largely by a decrease in concern in both South West and North West regions in May-June 2017 (compared with results in 2016), along with a trend for an increase in concern in Inner West region (Figure 8). The overall decrease in concern was mainly among residents aged 55 years and over. The decreases in concern in South West and North West regions have been maintained in February-March 2018.

Figure 8: Concern that building the airport would have a negative impact on Western Sydney, by demographics (Dec 2016 to Feb-Mar 2018)



Q8. Using the same scale where 0 means strongly disagree and 10 means strongly agree, to what extent do you agree or disagree with the statement below?

Base: All (Feb-Mar 18, n=613; Sep-Oct 17, n=615; May-Jun 17, n=1,244; Dec 16, n=503)

Shading highlights statistically significantly **higher** and **lower** results between waves

There were no significant differences on the statements between the regions in February-March 2018 (Table 11). There was a trend for agreement that '...fewer residents will be affected by noise compared to Sydney Airport' to be lower in South West and North West regions. Compared with May-June 2017 there were also less positive perceptions in North West and West Central regions:

- North West region:
 - to support Mascot (-13% agreeing)
 - bring jobs to the region (-11% agreeing)
 - provide a boost to business and tourism (-11% agreeing)
- West Central region:
 - harder to live and/or work in the area (+11% agreeing).

Table 11: Agreement (rating 7-10) with needs, benefits and impacts, by region (Feb-Mar 2018, and comparison with May-Jun 2017 and Sep-Oct 2017)

Agreement	Feb-Mar 2018				REGION							
	South West	Inner West	North West	West Central	Statistically significant change from May-Jun 17 (BW) / Sep-Oct 17 (W2)							
					South West	Inner West	North West	West Central	South West	Inner West	North West	West Central
Rated 7-10	%	%	%	%	BW %	W2 %	BW %	W2 %	BW %	W2 %	BW %	W2 %
Western Sydney Airport will bring jobs to the region	72	75	67	79	-	-	-	-	-11	-	-	-
Sydney needs a new airport to support the current one at Mascot	63	68	60	67	-	-	-	-	-13	-15	-	-
A new airport is necessary to maintain and grow Sydney's global competitiveness	60	72	61	65	-	-	-	-	-	-	-	-
Western Sydney Airport will provide a boost to business and tourism in Western Sydney	63	69	58	63	-	-	-	-	-11	-	-	-
Western Sydney Airport is necessary to support Western Sydney's growing population and economy	60	68	60	61	-	-	-	-	-	-	-	-
Western Sydney Airport will bring improved roads to the region	57	56	55	63	-	-	-	-	-	-	-	-
Planning restrictions around Western Sydney Airport site will mean fewer residents will be affected by noise compared to Sydney Airport	32	43	35	47	-	-	-	-	-	-	-	-
I'm worried that Western Sydney Airport would make it harder to live and/or work in the area	35	30	30	40	-	-	-	-	-	-	+11	-
I'm concerned that building the airport would have a negative impact on Western Sydney	32	30	33	34	-	-	-	-	-	-	-	-
Sample size	150	151	155	157								
Highlighting statistically significantly higher and lower results:	between regions in Feb-Mar 2018				comparing each region with May-Jun 2017 / Sep-Oct 2017							

Q8. Using the same scale where 0 means strongly disagree and 10 means strongly agree, to what extent do you agree or disagree with the statement below?

Base: All (Feb-Mar 18, n=613; Sep-Oct 17, n=615; May-Jun 17, n=1,244)

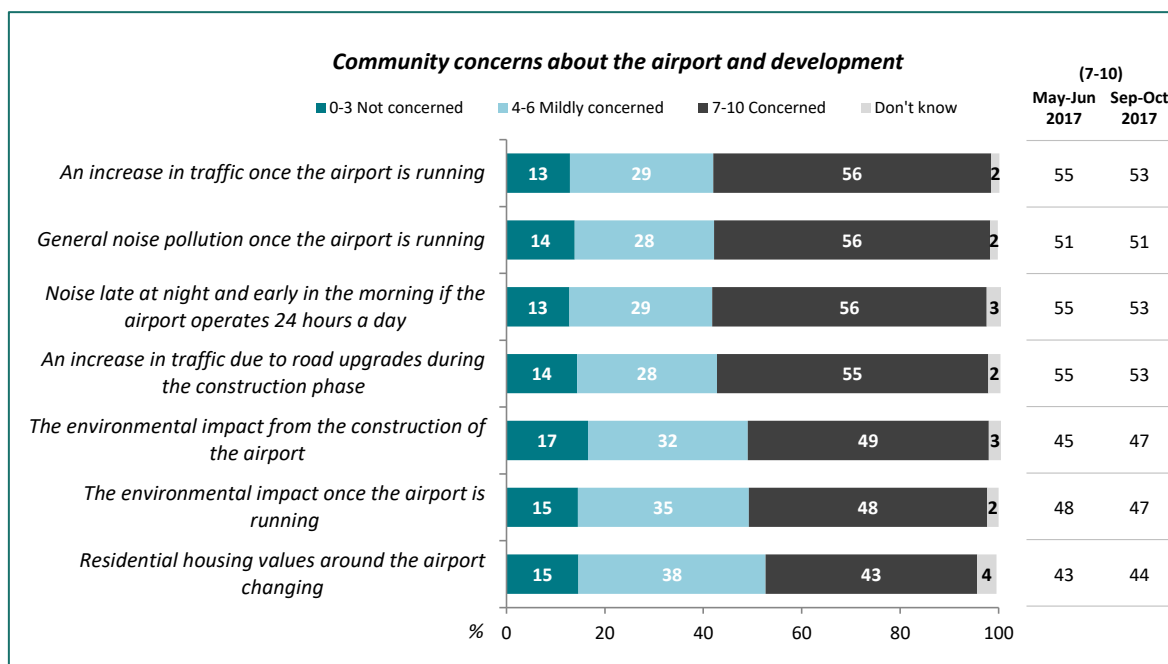
Potential concerns about environmental impacts

Concerns of residents were measured with a range of impacts of the Western Sydney Airport development on housing values, traffic, noise and other environmental issues. Over half of residents in February-March 2018 continued to be concerned (rating 7-10) about increases in traffic and noise (Figure 9):

- 'an increase in traffic due to road upgrades during the construction phase' (55%)
- 'general noise pollution once the airport is running' (56%)
- 'noise late at night and early in the morning if the airport operates 24 hours a day' (56%)

- 'an increase in traffic due once the airport is running' (56%).

Figure 9: Potential community concerns about the Western Sydney Airport development (Feb-Mar 2018, and comparison with May-Jun 2017 and Sep-Oct 2017)



Q9. On a scale of 0 to 10 where 0 not at all concerned and 10 means extremely concerned, how do you feel personally about the potential impact of a new airport in Western Sydney listed below?

Base: All (Feb-Mar 18, n=613; Sep-Oct 17, n=615; May-Jun 17, n=1,244)

Table 12: Potential community concerns about Western Sydney Airport development by region (Feb-Mar 2018, and comparison with May-Jun 2017 and Sep-Oct 2017)

Concern	REGION											
	Feb-Mar 2018				Statistically significant change from May-Jun 17 (BW) / Sep-Oct 17 (W2)							
	South West	Inner West	North West	West Central	South West	Inner West	North West	West Central	South West	Inner West	North West	West Central
Rated 7-10	%	%	%	%	BW %	W2 %	BW %	W2 %	BW %	W2 %	BW %	W2 %
An increase in traffic once the airport is running	60	51	54	59	-	-	-	-	-	-	-	-
General noise pollution once the airport is running	54	49	57	59	-	-	+10	-	-	-	-	-
Noise late at night and early in the morning if the airport operates 24 hours a day	53	53	59	55	-	-	-	-	-	-	-	-
An increase in traffic due to road upgrades during the construction phase	52	49	58	56	-	-	-	-	-	-	-	-
The environmental impact from the construction of the airport	44	51	48	51	-	-	-	-	-	-	-	-
The environmental impact once the airport is running	47	53	49	47	-	-	-	-	-	-	-	-
Residential housing values around the airport changing	38	48	41	45	-	-	+16	-	-	-	-	-
Sample size	150	151	155	157								
Highlighting statistically significantly higher and lower results:	between regions in Feb-Mar 2018				comparing each region with May-Jun 2017 / Sep-Oct 2017							

Q9. On a scale of 0 to 10 where 0 not at all concerned and 10 means extremely concerned, how do you feel personally about the potential impact of a new airport in Western Sydney listed below?

Base: All (Feb-Mar 18, n=613; Sep-Oct 17, n=615; May-Jun 17, n=1,244)

In February-March 2018, female residents were more likely than male residents to express concern about all seven issues presented, ranging from 4 to 20 percentage points higher. The largest differences were concern about the environmental impact:

- 'from the construction of the airport' (females: 59% vs. males: 39%)
- 'once the airport is running' (females 57% vs. males: 39%).

There were no significant differences measured between the regions in February-March 2018 (Table 12). Compared with May-June 2017, however, residents in Inner West region were now more concerned about:

- 'residential housing values around the airport changing' (+16%)
- 'general noise pollution once the airport is running' (+10%).

Additional analysis of benefits, concerns and environmental impacts

Additional analysis was conducted on the full set of benefits, concerns, and environmental impacts using the most recent two waves—September-October 2017 and February-March 2018—to give a more stable assessment of recent perceptions. An initial principal components analysis was conducted on the statements in Q8 and Q9 using the full 0-10 scale.

Figure 10: Comparison of average ratings on topics of impact of Western Sydney Airport development, by demographics (combined Sep-Oct 2017 and February-March 2018)

Demographic groups	Environmental impacts More impact ⇨	Concern overall + harder to live/work More concern ⇨	Meeting needs, improvements and benefits More benefit ⇨
GENDER			
Male	5.9	4.8	7.4
Female	6.6	5.2	7.1
AGE (years)			
18-34	6.4	5.4	7.0
35-54	6.4	5.2	7.2
55+	6.0	4.3	7.5
REGION			
South West	6.4	5.2	7.2
Inner West	6.0	4.8	7.3
North West	6.3	5.0	7.0
West Central	6.3	5.0	7.3
CALD			
Yes	6.4	5.0	7.4
No	6.2	5.0	7.1
	Average rating (0-10)	Average rating (0-10)	Average rating (0-10)
Statements contributing most strongly to each dimension	<ul style="list-style-type: none"> - General noise pollution once the airport is running - Increase in traffic once the airport is running - Increase in traffic due to road upgrades during construction - Noise late at night and early in the morning 24 hours a day - Environmental impact once the airport is running - Environmental impact from the construction of the airport - Residential housing values around the airport changing 	<ul style="list-style-type: none"> - Concern that building the airport would have a negative impact on Western Sydney - Worried that would make it harder to live and/or work in the area 	<ul style="list-style-type: none"> - Necessary to support Western Sydney's growing population and economy - Necessary to maintain and grow Sydney's global competitiveness - Provide a boost to business and tourism - Sydney needs a new airport to support the current one - Bring jobs to the region - Improved roads to the region - Planning restrictions will mean fewer residents will be affected by noise

Base: February-March 2018 and September-October 2017

Highlighting statistically significantly more positive and negative sentiment between groups

This type of analysis identifies which statements have similar patterns of ratings. Three groupings of statements were identified: environmental impacts, overall concern about the airport development, and benefits the airport will bring. This pattern was similar to that observed previously, analysing the first two waves. The ratings were averaged across statements in each grouping.

The topics, along with the underlying statements, are shown in Figure 10, along with comparisons of the main demographic groups on the average scores. The shading highlights significantly more positive (■) and negative (■) sentiment:

- **environmental impacts** (higher score = more impact ■)
- **concern overall concern overall and harder to live/work in the area** (higher score = more concern ■)
- **meeting needs, and providing improvements and benefits** (higher score = greater benefit ■).

Key differences between the groups remained the same as in the earlier analysis, indicating that the underlying attitudinal positions have not changed:

- greater concern among **female residents** about **environmental impacts** of building and operating the airport and **concerns** about the area
- greater concern among **residents aged 18-34 years** about a **negative impact of the airport overall and on living/working in the area**, and lower concern among residents aged 55 years and over
- lower concern in **Inner West** region about the **environmental impacts**
- greater **perceived benefits** among **residents aged 55 years and older** and lower perceived benefits among residents aged 18-34 years
- greater **perceived benefits** among **residents from culturally and linguistically diverse communities**³
- lower concern in **North West** region about the **benefits**.

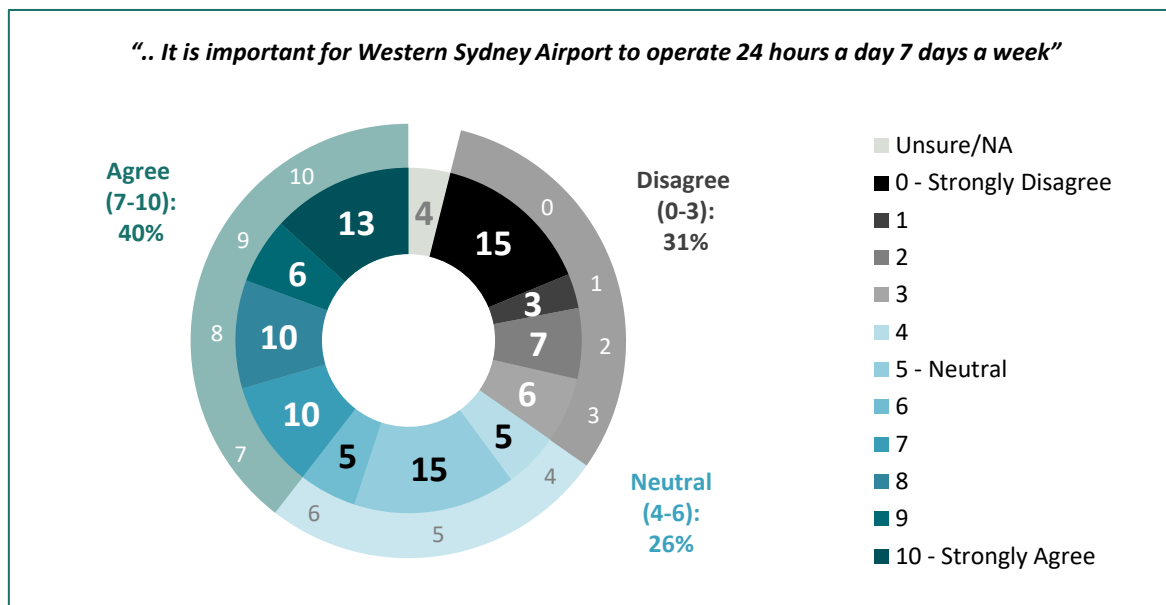
Among these topics, the **level of agreement with benefits** of the airport had the strongest association with **favourability of the airport**.

³ As noted previously, the measured difference was not related to CALD residents in the survey being on average younger.

4.3. Operating 24 Hours a Day, 7 Days a Week

Residents rated the importance of Western Sydney Airport operating 24 hours a day, 7 days a week. Two-fifths (40%) of residents in February-March 2018 agreed (rating 7-10) that it was important (Figure 11), marginally lower than May-June 2017 (45%) and September-October 2017 (47%).

Figure 11: Perception of importance of the airport operating 24 hours a day, 7 days a week (Feb-Mar 2018)



Q10. Using a scale of 0 to 10, where 0 means strongly disagree and 10 means strongly agree, to what extent do you agree or disagree with the following statement? "It is important for Western Sydney Airport to operate 24 hours a day, 7 days a week, rather than be restricted by a curfew"

Base: All (n=613)

Disagreement (rating 0-3) with importance (31%) was marginally higher in February-March 2018 than the average of the surveys in 2017 (26%), and significantly higher than the average results in 2015-2016 (18%, over a narrow range of 17% to 20%) (Table 13). The increase in disagreement was associated with a decrease in being undecided (neutral or 'don't know').

Table 13: Perception of importance of the airport operating 24 hours a day, 7 days a week, by waves (Nov 2014 to Feb-Mar 2018)

Importance of airport operating 24/7									
Agreement	Initial Benchmark November 2014	June 2015	December 2015	April 2016	August 2016	December 2016	New Benchmark May-Jun 2017	Sep-Oct 2017	Feb-Mar 2018
Rated 0-10	%	%	%	%	%	%	%	%	%
0-3 Disagree		17	17	20	19	19	27	25	31
4-6 Neutral		29	24	27	26	24	24	24	26
7-10 Agree		46	51	45	47	48	45	47	40
Don't know		8	8	8	8	9	4	4	4
Sample size		513	502	499	505	503	1244	615	613

Q10. Using a scale of 0 to 10, where 0 means strongly disagree and 10 means strongly agree, to what extent do you agree or disagree with the following statement? "It is important for Western Sydney Airport to operate 24 hours a day, 7 days a week, rather than be restricted by a curfew"

Base: All (n=502-1,244)

Shading highlights statistically significantly **higher** and **lower** results between waves

In February-March 2018, female residents (40%) were again more likely than male residents (21%) to disagree with the importance of 24-hour operation, while male residents were more likely to agree (49% vs. 30%) (Table 14). Residents aged 55 years and over were also more likely to disagree (43%), particularly compared with those aged 18-34 years (17%); and with the corresponding difference largely in the neutral position (Table 13). The lower disagreement among culturally and linguistically diverse residents (18% vs. 37% among other residents) continues the pattern seen in both earlier surveys in 2017, and was confirmed when taking age into account.

Table 14: Perception of importance of the airport operating 24 hours a day, 7 days a week, by demographics (Feb-Mar 2018)

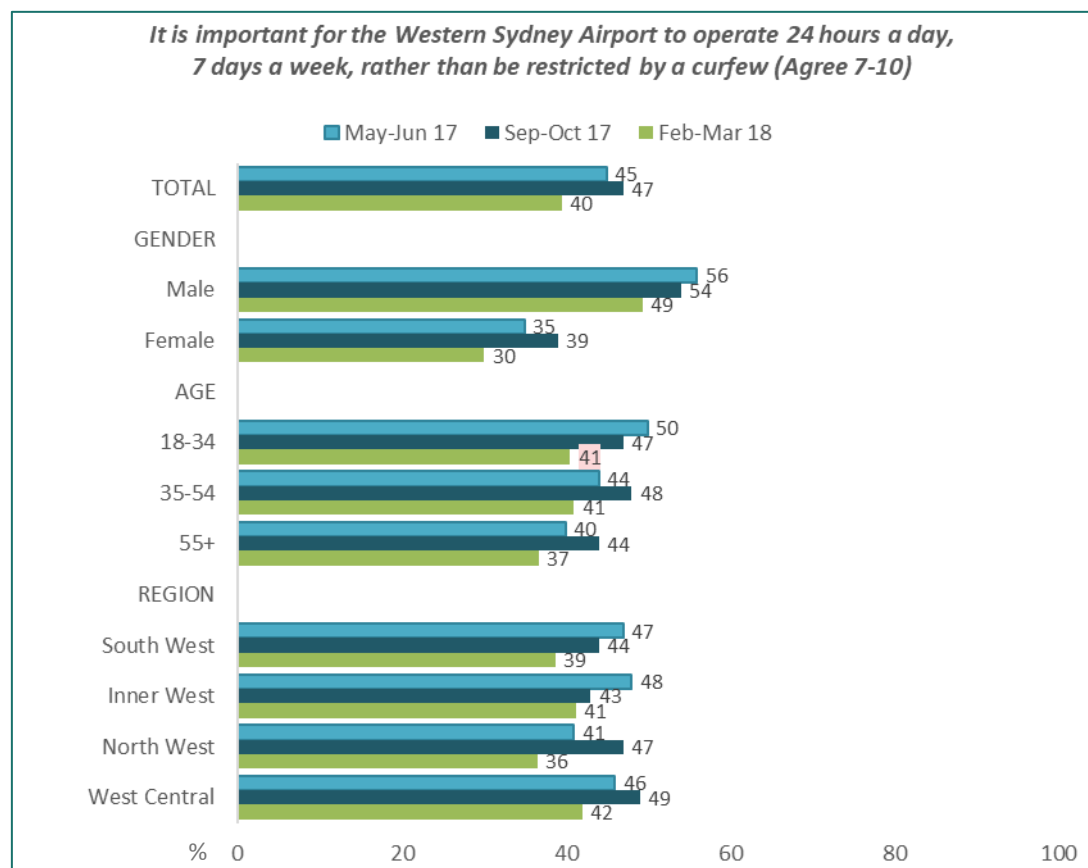
Agreement	TOTAL	Gender		Age			Region				Culturally and Linguistically Diverse	
		Male	Female	18-34	35-54	55+	South West	Inner West	North West	West Central	Yes	No
Rated 0-10	%	%	%	%	%	%	%	%	%	%	%	%
0-3 Disagree	31	21	40	17	34	43	31	26	40	24	18	37
4-6 Neutral	26	24	27	37	20	19	27	27	20	30	31	23
7-10 Agree	40	49	30	41	41	37	39	41	36	42	49	36
Unsure/NA	4	5	3	5	5	1	3	5	3	4	2	5
Sample size	613	305	308	207	204	202	150	151	155	157	170	436

Q10. Using a scale of 0 to 10, where 0 means strongly disagree and 10 means strongly agree, to what extent do you agree or disagree with the following statement? 'It is important for Western Sydney Airport to operate 24 hours a day, 7 days a week, rather than be restricted by a curfew'

Base: All (n=613)

Shading highlights statistically significantly higher and lower results between groups

Figure 12: Agreement with importance of the airport operating 24 hours a day, 7 days a week, by demographics (May-Jun 17 to Feb-Mar 18)



Q10. Agreement: "It is important for Western Sydney Airport to operate 24 hours a day, 7 days a week, rather than be restricted by a curfew"

Base: All (Feb-Mar 18, n=613; Sep-Oct 17, n=615; May-Jun 17, n=1,244)

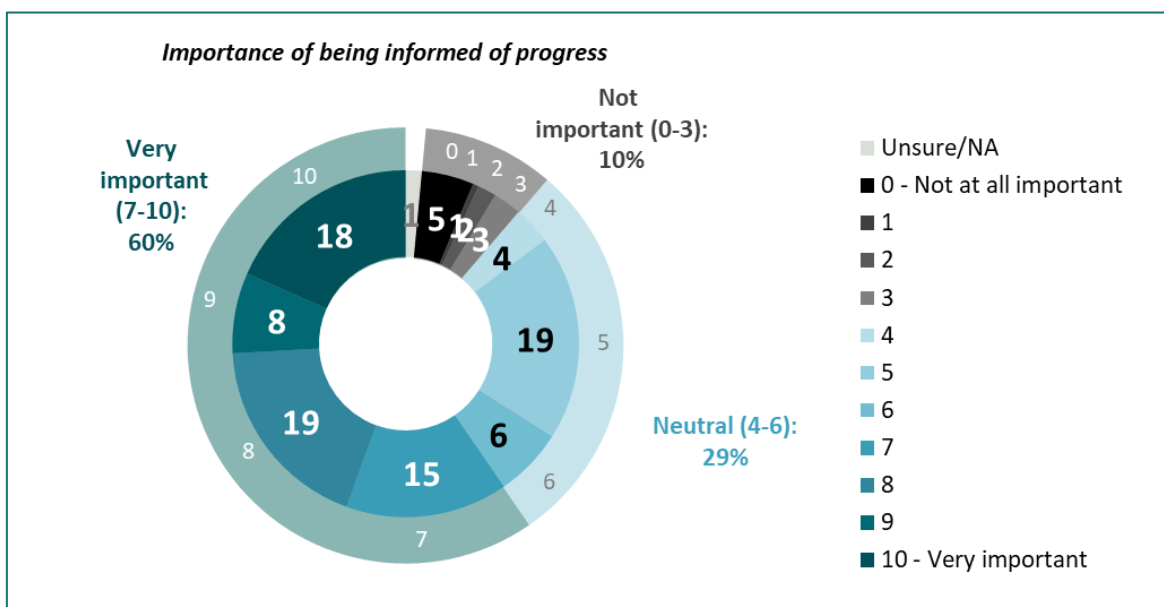
Shading highlights statistically significantly higher and lower results between waves

There were no significant changes in February-March 2018 from September-October 2017 among the main demographic groups (Figure 12). The decreasing trend in February-March 2018 compared with the average of the two surveys in 2017, however, occurred across all gender and age groups, as well as for the four regions.

4.4. Communications

The majority (60%) of residents in February-March 2018 continued to consider that it was important (rating 7-10) to be kept informed of progress with development of the airport, with one in ten (10%) considering that it was not important (rating 0-3) (Figure 13). These results have remained relatively stable across the waves of research, with no major changes (Table 15). There was a small increase in a rating of low importance (10%) compared with the average of 2016-2017 (7%), which will be monitored in further surveys. As shown on the next page in Table 10, a rating of low importance was highest in February-March 2018 in Inner West region (16%).

Figure 13: Perception of importance of being informed about progress of the Western Sydney Airport's development (Feb-Mar 2018)



Q14. Using a scale of 0 to 10, where 0 means not at all important and 10 means very important, please indicate how you feel personally about being informed about the progress of the Western Sydney Airport at Badgerys Creek?

Base: All (n=613)

Table 15: Importance of being informed of progress, by waves (Nov 2014 to Feb-Mar 2018)

Being informed about progress									
Importance	Initial Benchmark November 2014	June 2015	December 2015	April 2016	August 2016	December 2016	New Benchmark May-Jun 2017	Sep-Oct 2017	Feb-Mar 2018
Rated 0-10*	%	%	%	%	%	%	%	%	%
0-3 Not important	9	7	7	6	8	7	8	7	10
4-6 Neutral/Unsure	33	29	31	34	33	31	33	34	29
7-10 Very important	58	64	62	60	59	62	59	57	60
Sample size	501	513	502	499	505	503	1244	615	613

Q14. Using a scale of 0 to 10, where 0 means not at all important and 10 means very important, please indicate how you feel personally about being informed about the progress of the Western Sydney Airport at Badgerys Creek?

Base: All (n=501-1,244)

*Note: A 'don't know' response was not included in the earlier survey series up to December 2016 – these responses are excluded from May-Jun 2017, Sep-Oct 2017 and Feb-Mar 2018

There were some significant differences in February-March 2018 between the demographic groups (Table 16). The main differences were for:

- female residents to be more likely to be neutral (rating 4-6) (33% vs. 25% for males), with a corresponding difference mainly in rating as important (rating 7-10)
- residents in Inner West region to be least likely to consider it as important (49% vs. 59–63% for the other regions)
- culturally and linguistically diverse residents to be more likely to consider it important (69% vs. 56% for other residents), with a corresponding lower likelihood of being neutral.

There were no significant changes in February-March 2018 in any of the regions (Table 17).

Table 16: Importance of being informed about progress, by demographics (Feb-Mar 2018)

Importance	TOTAL	Gender		Age			Region				Culturally and Linguistically Diverse	
		Male	Female	18-34	35-54	55+	South West	Inner West	North West	West Central	Yes	No
<i>Rated 0-10</i>	%	%	%	%	%	%	%	%	%	%	%	%
0-3 Not important	10	10	9	8	9	13	10	16	9	8	11	9
4-6 Neutral	29	25	33	35	29	23	29	34	28	28	21	33
7-10 important	60	63	57	56	59	64	59	49	60	63	69	56
Unsure	1	2	1	1	3	0	1	0	3	1	0	2
Sample size	613	305	308	207	204	202	150	151	155	157	170	436

Q14. Using a scale of 0 to 10, where 0 means not at all important and 10 means very important, please indicate how you feel personally about being informed about the progress of the Western Sydney Airport at Badgerys Creek?

Base: All (n=613)

Shading highlights statistically significantly **higher** and **lower** results between groups

Table 17: Importance of being informed about progress, by region (Feb-Mar 2018)

Importance	REGION				Changes
	Feb-Mar 2018				
	South West	Inner West	North West	West Central	
Rated 0-10	%	%	%	%	No statistically significant changes in each Region from May-Jun 17 or Sep-Oct 17
0-3 Not important	10	16	9	8	
4-6 Neutral	30	34	28	29	
7-10 Important	60	49	62	64	
Unsure	1	0	3	1	
Sample size	150	151	155	157	
Highlighting statistically significantly higher and lower results:	between regions in Feb-Mar 2018				

Q14. Using a scale of 0 to 10, where 0 means not at all important and 10 means very important, please indicate how you feel personally about being informed about the progress of the Western Sydney Airport at Badgerys Creek?

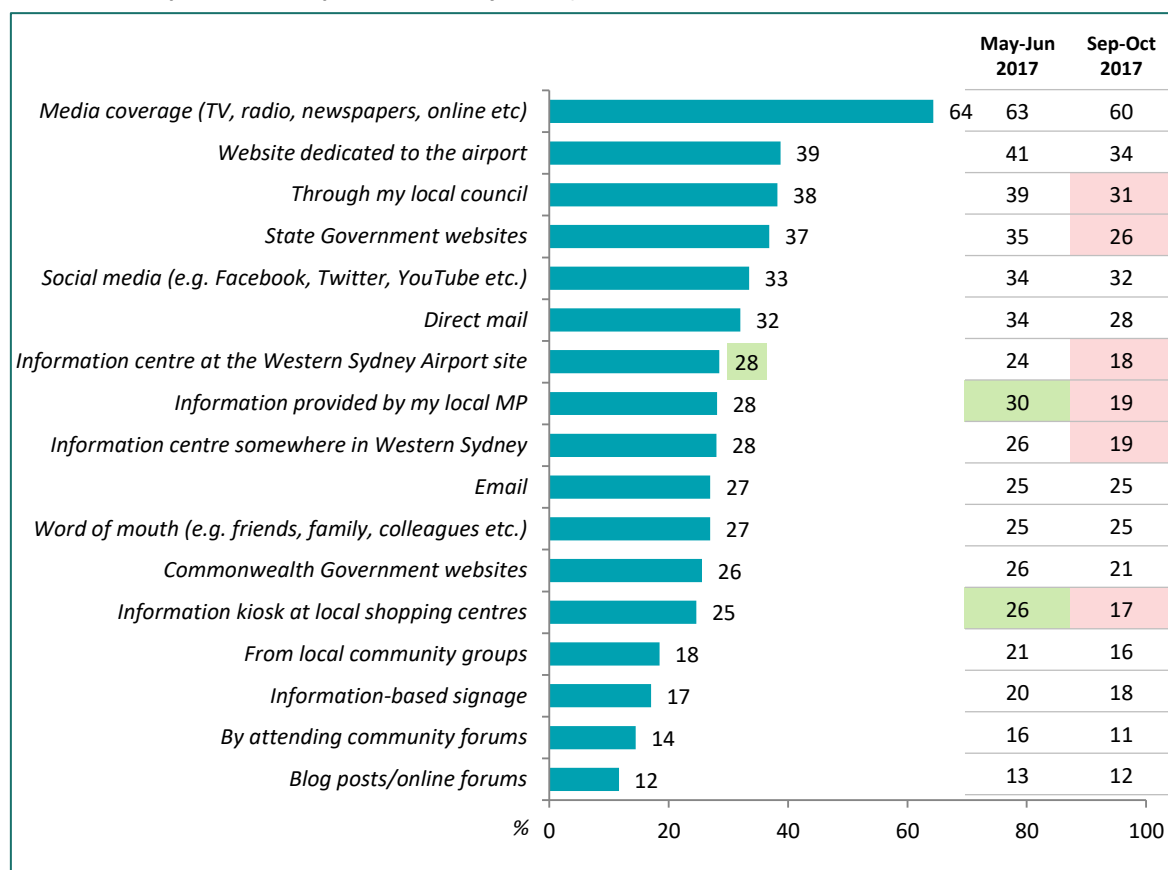
Base: All (Feb-Mar 18, n=613; Sep-Oct 17, n=615; May-Jun 17, n=1,244)

Residents who rated some level of importance in being kept informed of progress (rating 6-10) were asked where they would want to get their information from. 'Media coverage' continued to be the most preferred communication channel, nominated by three-fifths (64%) of residents in February-March 2018, similar to the results in May-June 2017 (63%) and September-October 2017 (60%) (Figure 14). The next three channels represented both local and online sources, including a dedicated website (39%), local council (38%) and state government websites (37%).

There had been a decrease in the nominations of several channels in September-October 2017 compared with May-June 2017, including for a dedicated website and local council, which had suggested some dissipation of strong interest following the earlier announcement that the government would develop the airport. With further progress of the airport development, however, results in February-March 2018 reverted to similar levels in May-June 2017.

Relatively few residents were, again, interested in getting information from blog posts/online forums (12%) or by attending community forums (14%).

Figure 14: Preferred communication channels for information about the Western Sydney Airport's development (Feb-Mar 18 and comparison with Sep-Oct 17 and May-Jun 17)



Q15. Where would you want to get information about Western Sydney Airport? Please select all that apply.

Base: Those who provided a rating of 6-10 on importance in being informed of the airport's development (n=400-852 across the waves)

Highlighting statistically significantly higher and lower results between waves

A comparison of preferred channels showed little difference between the regions in February-March 2018, with only a greater preference for email in North West region (Table 18). Significant increases from the September-October 2017 survey occurred for specific channels in three of the regions:

- South West region:
 - information centre at the site (+19%)
 - local council (+16%)
- North West region:
 - information centre at the site (+16%)
 - information kiosk at local shopping centres (+13%)
- West central region:
 - state government websites (+16%).

Table 18: Preferred communications channels, by region (Feb-Mar 2018 and comparison with May-Jun 2017 and Sep-Oct 2017)

Channel	REGION											
	Feb-Mar 2018				Statistically significant change from May-Jun 17 (BW) / Sep-Oct 17 (W2)							
	South West	Inner West	North West	West Central	South West	Inner West	North West	West Central	South West	Inner West	North West	West Central
	%	%	%	%	BW %	W2 %	BW %	W2 %	BW %	W2 %	BW %	W2 %
Media coverage (TV, radio, newspapers, online, etc.)	68	60	67	62	-	-	-	-	-	-	-	-
Website dedicated to the airport	41	46	42	32	-	-	-	-	-	-	-	-
Through my local council	48	31	44	31	-	+16	-	-	-	-	-	-
State Government websites	39	41	36	35	-	-	-	-	-	-	-	+16
Social media (e.g. Facebook, Twitter, YouTube, etc.)	32	33	37	31	-	-	-	-	-	-	-	-
Direct mail	34	25	41	26	-	-	-	-	-	-	-	-
Information centre at the Western Sydney Airport site	32	19	35	25	-	+19	-	-	-	+16	-	-
Information provided by my local MP	30	21	33	25	-	-	-	-	-	-	-	-
Information centre somewhere in Western Sydney	24	18	31	31	-	-	-	-	-	-	-	-
Email	21	24	36	23	-	-	-	-	-	-	-	-
Word of mouth (e.g. friends, family, colleagues, etc.)	25	20	29	28	-	-	-	-	-	-	-	-
Commonwealth Government websites	21	28	30	23	-	-	-	-	-	-	-	-
Information kiosk at local shopping centres	26	27	29	19	-	-	-	-	-	+13	-	-
From local community groups	17	14	16	23	-	-	-	-	-	-	-	-
Information-based signage	16	13	21	15	-	-	-	-	-	-	-	-
By attending community forums	11	8	21	12	-	-	-	-	-	-	-	-
Blog posts/online forums	8	10	11	14	-	-	-	-	-	-	-	-
Sample size	98	93	105	104								
Highlighting statistically significantly higher and lower results:	between regions in Feb-Mar 2018				comparing each region with May-Jun 2017 / Sep-Oct 2017							

Q15. Where would you want to get information about Western Sydney Airport? Please select all that apply.

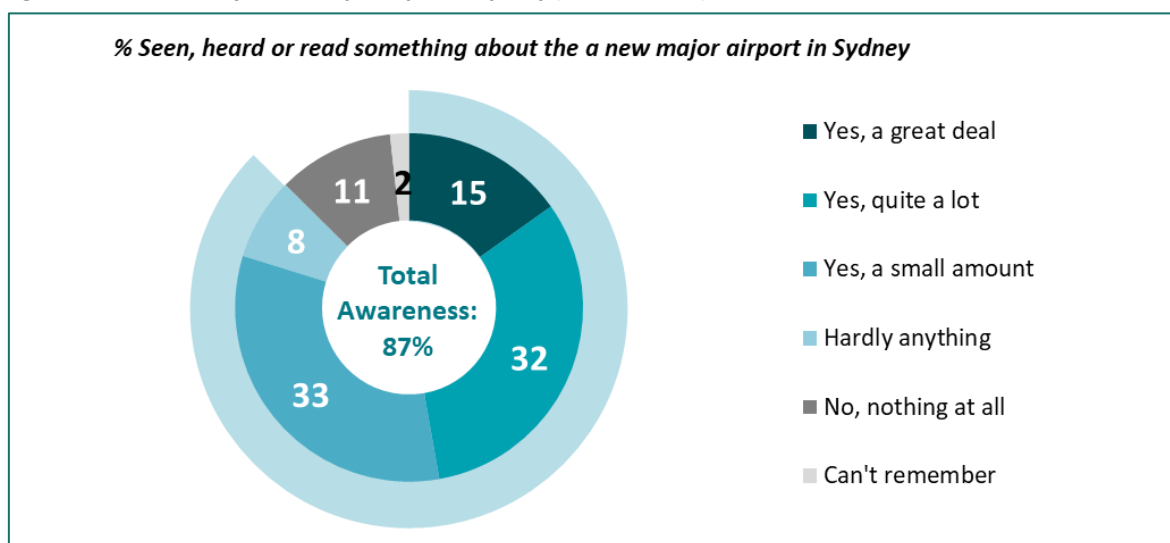
Base: Those who provided a rating of 6-10 rating of importance in being informed of the airport's development (n=400)

5 Other Measures

5.1. Awareness of Western Sydney Airport

A large majority (87%) of residents in February-March 2018 were again aware of the development of a new major airport in Sydney (Figure 15), similar to May-June 2017 (91%) and September-October 2017 (89%). This figure included a small minority (15%) of residents who considered they knew 'a great deal', similar to September-October 2017 (15%) and marginally below May-June 2017 (20%).

Figure 15: Awareness of a new major airport in Sydney (Feb-Mar 2018)



Q1. Before today, have you seen, heard or read anything about the development of a new major airport in Sydney?

Base: All (n=613)

Key differences among the demographic groups in February-March 2018 were for residents aged 55 years and over (61%) to be more likely to consider they knew at least 'quite a lot' about the development of a new major airport (Table 19). Residents in Inner West region were the least likely to hold such a view (34%).

Table 19: Awareness of a new major airport in Sydney, by demographics (Feb-Mar 2018)

Awareness	Gender			Age			Region				Culturally and Linguistically Diverse	
	TOTAL	Male	Female	18-34	35-54	55+	South West	Inner West	North West	West Central	Yes	No
	%	%	%	%	%	%	%	%	%	%	%	%
Total Aware	87	90	85	82	87	94	89	83	90	86	86	88
Great deal	15	18	12	11	17	17	16	11	15	17	14	15
Quite a lot	32	35	29	29	25	44	33	23	32	35	30	33
<i>Quite a lot/a great deal</i>	47	53	42	40	42	61	49	34	47	51	45	48
Small amount	33	32	34	32	38	27	35	37	35	27	34	32
Hardly anything	8	5	10	11	7	5	4	12	8	8	7	7
Nothing at all	11	9	13	14	12	6	11	16	7	12	13	10
Unsure/NA	2	1	2	4	1	0	0	0	3	2	1	2
Sample size	613	305	308	207	204	202	150	151	155	157	170	436

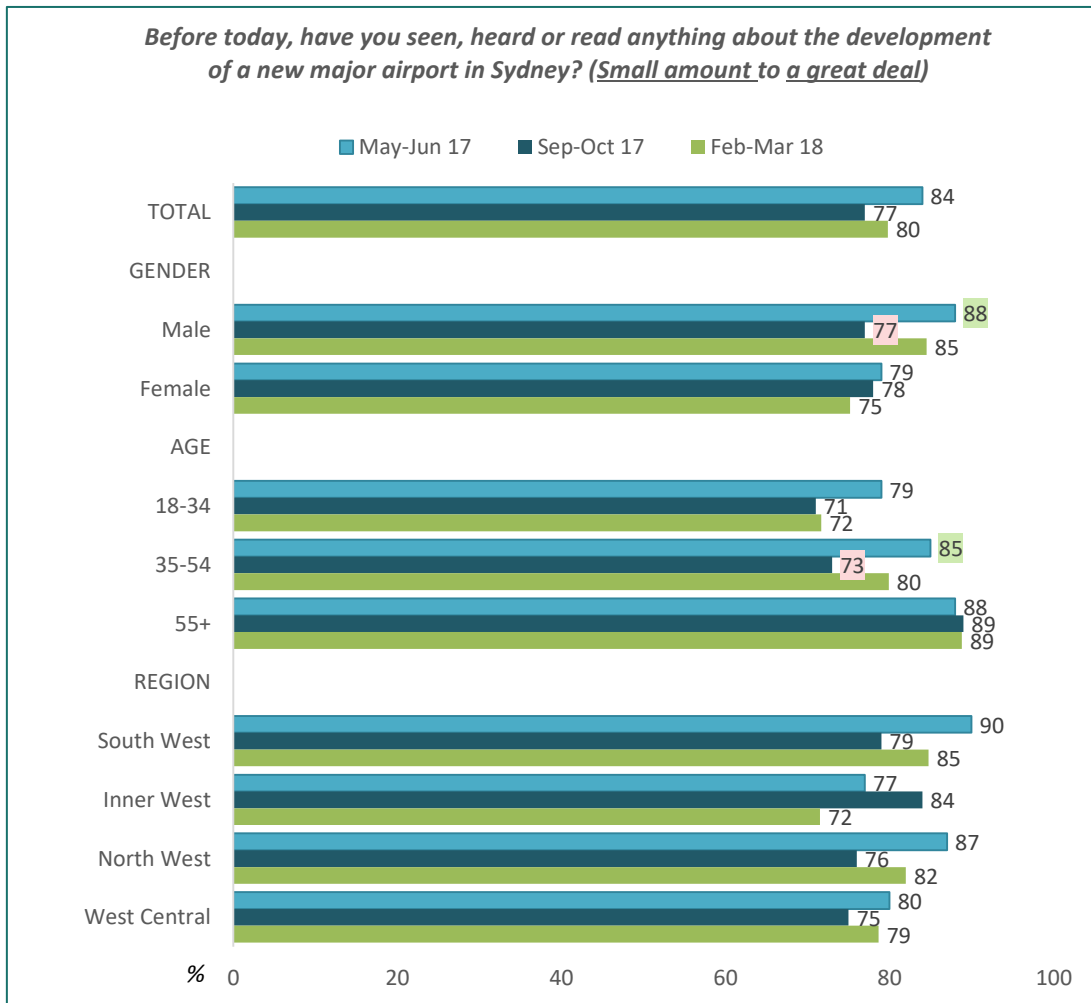
Q1. Before today, have you seen, heard or read anything about the development of a new major airport in Sydney?

Base: All (n=613)

Shading highlights statistically significantly **higher** and **lower** results between groups

Awareness of at least ‘a small amount’ had decreased marginally in September-October 2017 (77%) following the May-June 2017 benchmark (84%), with the result in February-March 2018 (80%) showing some overall consistency (Figure 16). The decrease in September-October 2017 had primarily been in all regions except Inner West region, which had shown an increase, and was primarily among male residents and those aged 35-54 years. The results for these demographic groups, however, recovered in February-March 2018, although the trend for an increase in Inner West region (from 77% to 84%) was not maintained (72%).

Figure 16: Awareness of a new major airport in Sydney: know at least a small amount, by wave and demographics (May-Jun 2017 to Feb-Mar 2018)



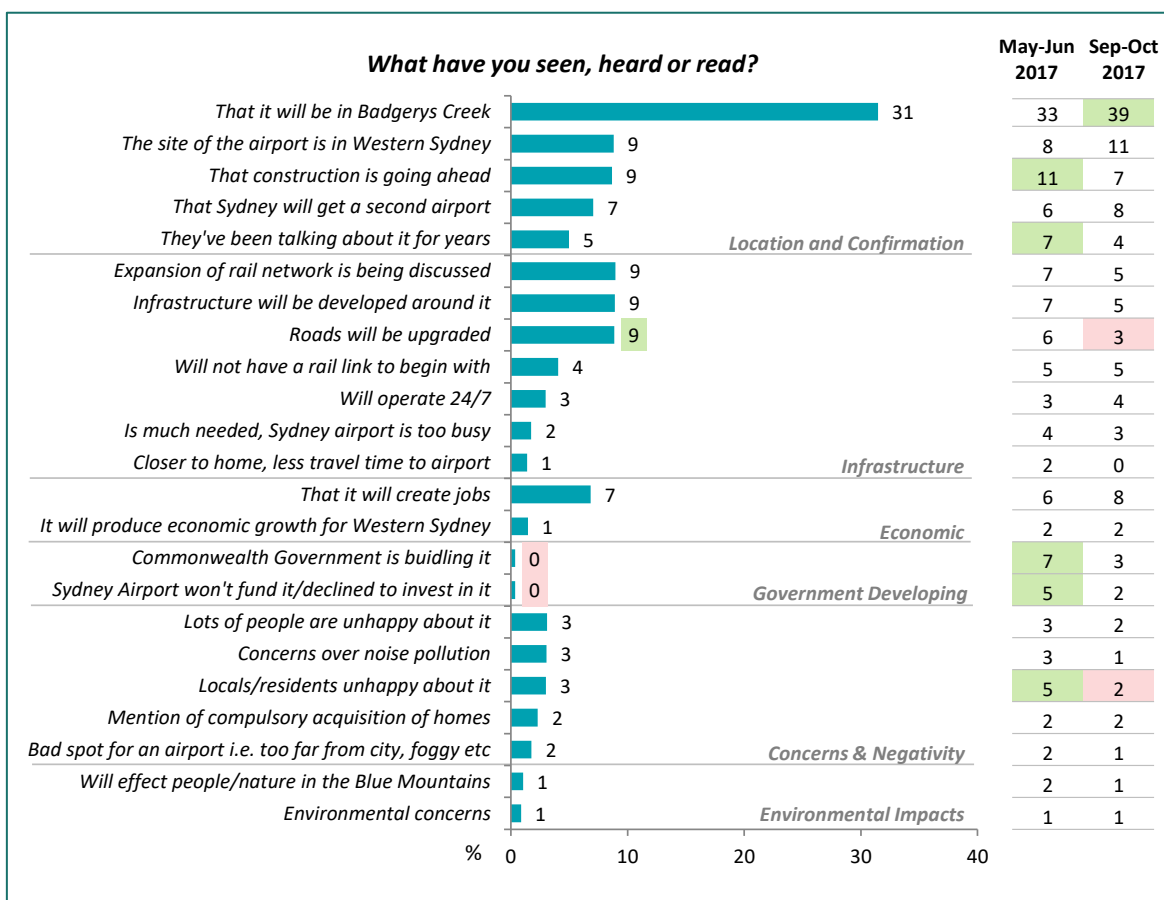
Q1. Before today, have you seen, heard or read anything about the development of a new major airport in Sydney?

Base: All (Feb-Mar 18, n=613; Sep-Oct 17, n=615; May-Jun 17, n=1,244)

Shading highlights statistically significantly higher and lower results between groups

Residents who were aware of a new major airport in Sydney were asked, unprompted, what they had heard about the development. Around three-fifths of these residents in February-March 2018 mentioned something about the location of the airport or that it was going ahead, similar to the previous two waves in 2017. This category included about one-third (31%) specifically mentioning Badgerys Creek—marginally lower than in May-June 2017 (39%)—with other details surrounding the development continuing to be relatively low (Figure 17). Some detail about infrastructure and development was mentioned by around one-quarter (27%)—higher than in September-October 2017 (19%)—including the potential expansion of a rail network to the airport (9%) and that roads would be upgraded in the surrounding area (9%), and more generally about the infrastructure being developed (9%). About one in ten (11%) mentioned a top-of-mind concern or negative aspect of the development, higher than in September-October 2017 (6%).

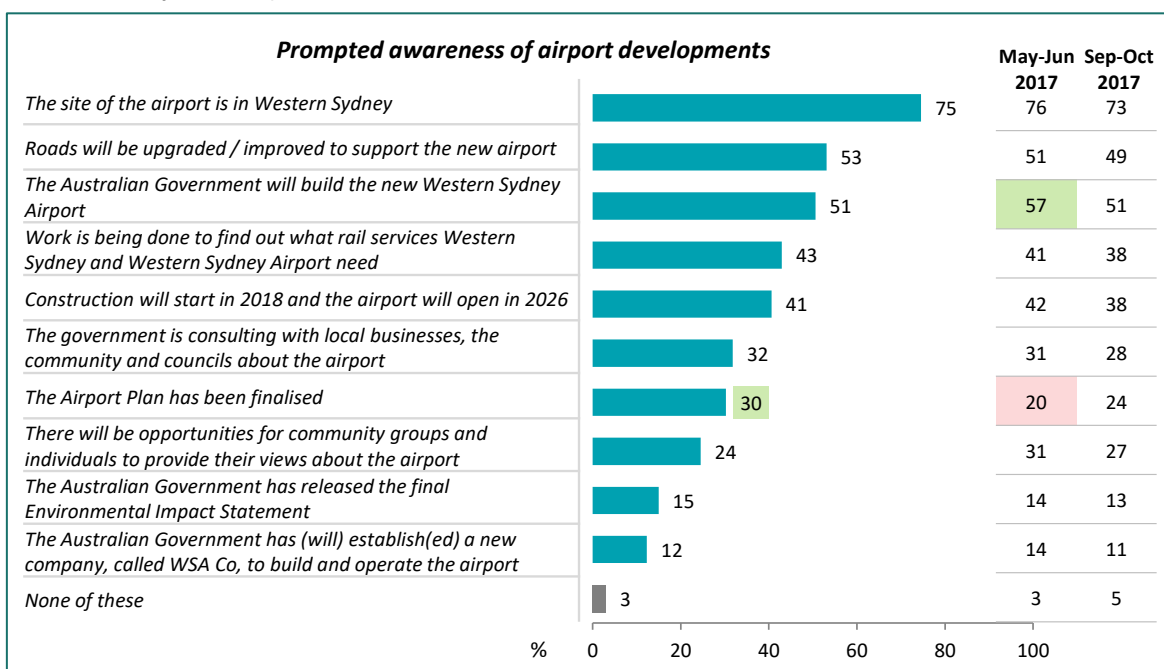
Figure 17: Unprompted awareness of the new airport's developments (Feb-Mar 2018, and comparison with May-Jun 2017 and Sep-Oct 2017)



Q2. What have you seen, heard or read about the development of a new major airport in Sydney?

Base: Those who have seen, heard or read anything about the development of a new major airport in Sydney (n=536)

Figure 18: Prompted awareness of the new major airport's developments (Feb-Mar 2018, and comparison with May-Jun 2017 and Sep-Oct 2017)



Q3. Which of the following aspects of the development of a new major airport in Sydney have you heard about before today?

Base: Those who have seen, heard or read anything about the development of a new major airport in Sydney (n=536)

When asked about particular aspects of the new major airport in Sydney, three-quarters (75%) in February-March 2018 indicated that they knew the site of the new airport would be in Western Sydney (Figure 18). This result was similarly high in May-June 2017 (76%) and September-October 2017 (73%). Around half (51%) were aware that the Australian Government would be building the new airport, although this result was lower than in May-June 2017 (57%)—awareness had decreased in all regions, most strongly in Inner West region. A similar proportion (53%) were also aware that roads would be upgraded to support the new airport.

There had been an increase in February-March 2018 in awareness that the Airport Plan (described as a document that outlines and authorises the development and operation of a new single-runway airport at Badgerys Creek) has been finalised (30%, up from 20% in May-June 2017, and 24% in September-October 2017). An increase in awareness occurred in South West and West Central regions.

Residents continued to be much less aware that the Environmental Impact Statement had been released (15%), or that the Australian Government will establish a new company, called WSA Co, to build and operate the airport (12%).

Table 20: Awareness of a new major airport in Sydney, by region (Feb-Mar 2018 and comparing with Sep-Oct 2017 and May-Jun 2017)

Awareness	REGION											
	Feb-Mar 2018				Statistically significant change from May-Jun 17 (BW) / Sep-Oct 17 (W2)							
	South West	Inner West	North West	West Central	South West	Inner West	North West	West Central	South West	Inner West	North West	West Central
	%	%	%	%	BW %	W2 %	BW %	W2 %	BW %	W2 %	BW %	W2 %
The site of the airport is in Western Sydney	81	70	76	72	-	-	-	-	-	-	-	-
Roads will be upgraded / improved to support the new airport	60	49	55	49	-	-	-	-	-	-	-	-
The Australian Government will build the new Western Sydney Airport	58	44	50	51	-	-	-15	-	-	-	-	-
Work is being done to find out what rail services Western Sydney and Western Sydney Airport need	39	41	47	42	-	-	-	-	-	-	-	-
Construction will start in 2018 and the airport will open in 2026	46	28	45	39	-	-	-14	-	-	-14	-	-
The government is consulting with local businesses, the community and councils about the airport	27	31	36	31	-	-	-	-	-	-	-	-
The Airport Plan, a document that outlines and authorises the development and operation of a new single-runway airport at Badgerys Creek, has been finalised	34	19	23	39	+12	+13	-	-	-	-	+21	+17
There will be opportunities for community groups and individuals to provide their views about the airport	28	27	27	19	-	-	-	-	-	-	-	-
The Australian Government has released the final Environmental Impact Statement	12	14	17	16	-	-	-	-	-	-	-	-
The Australian Government has established a new company, called WSA Co, to build and operate the airport	12	14	13	11	-	-	-	-	-	-	-	-
None of these	0	6	5	2	-	-	-	-	-	-	-	-
Sample size	135	128	139	134								
Highlighting statistically significantly higher and lower results:	between regions in Feb-Mar 2018				comparing each region with May-Jun 2017 / Sep-Oct 2017							

Q3. Which of the following aspects of the development of a new major airport in Sydney have you personally heard about before today?

Base: Those who have seen, heard or read anything about the development of a new major airport in Sydney (n=536)

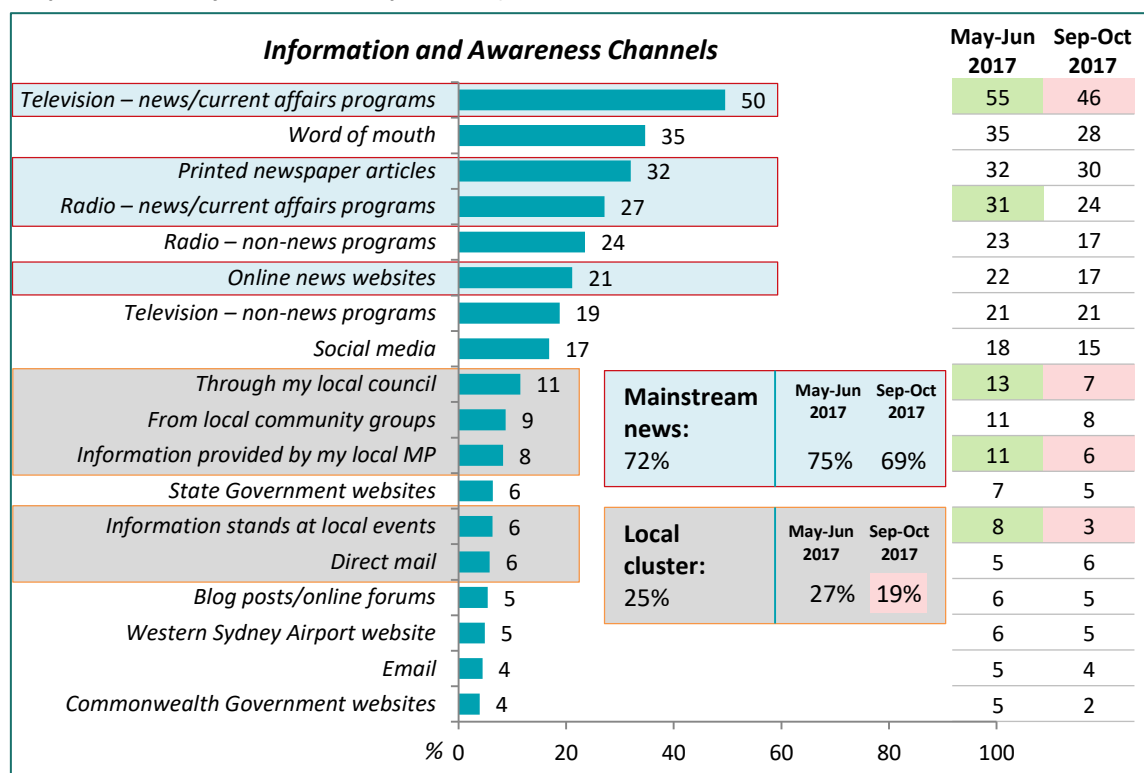
Prompted awareness of these developments showed some differences between the regions (Table 20). Awareness of the Airport Plan being finalised had increased in February-March 2018 specifically in South West region (to 34%) and West Central regions (to 39%), with awareness now higher than in Inner West region (19%) and North West region (23%). Residents in Inner West region were also least likely to report awareness of the construction and opening dates (28% vs. 39–45% in the other regions), with some reduction compared with May-June 2017.

5.2. Sources of Information

Residents who indicated that they were aware of a new major airport in Sydney were asked where they had seen, heard or read about the development. Nomination of several channels had decreased in September-October 2017 compared with May-June 2017, and the results in February-March 2018 recovered to be generally closer to the benchmark (Figure 19).

The most common individual channel in February-March 2018 was, again, television news/current affairs, nominated by half (50%) of this group of residents; followed by 'word of mouth' (35%) and printed newspaper articles (32%). Overall, mainstream news channels were nominated by over two-thirds (72% reporting any), similar to May-June 2017 (75%) and September-October 2017 (69%). The cluster of local channels (25% reporting any) also improved following a decrease in September-October 2017 (19%). Nomination in February-March 2018 of either a Commonwealth Government website or the Western Sydney Airport website remained relatively low (8%).

Figure 19: Channels of awareness of the development of a new major airport in Sydney (Feb-Mar 2018, and comparison with May-Jun 2017 and Sep-Oct 2017)



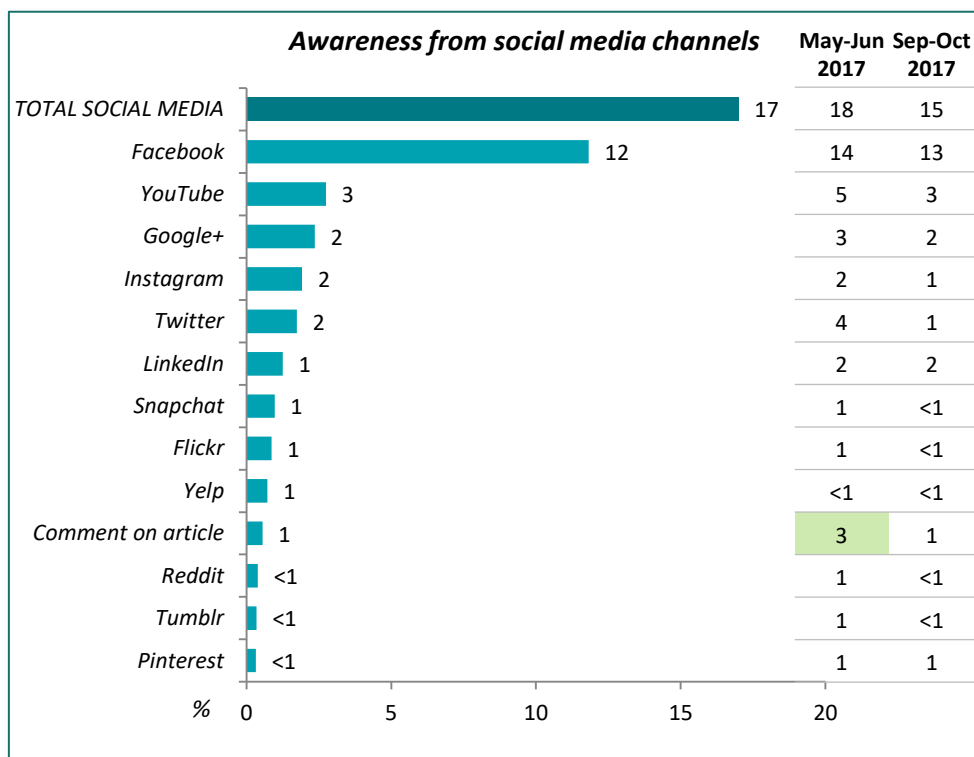
Q4. Where have you seen, heard or read anything about the development of a new major airport in Sydney?

Base: Those who have seen, heard or read anything about the development of a new major airport in Sydney (n=536)

Highlighting statistically significantly higher and lower results between waves

A minority (17%) of residents aware of the new airport had been exposed to information on a social media site, similar to the previous two surveys in 2017 (15–18%). Facebook (12% of those aware) was again the most prominent channel, similar to the two earlier surveys (13–14%) (Figure 20).

Figure 20: Social media channel sources of posts about the new Western Sydney Airport (Sep-Oct 2017)



Q16. Please select all of the below social networks/channels on which you have seen posts about the new airport in the last 3 months.
 Base: Those who indicated that they had heard, seen or read something about the airport on social media (n=87)
 Highlighting statistically significantly **higher** and **lower** results between waves

Table 21: Channels of awareness of the development of a new major airport, by demographics (Sep-Oct 2017)

Channel	TOTAL	Gender		Age			Location				Culturally and Linguistically Diverse	
		Male	Female	18-34	35-54	55+	South West	Inner West	North West	West Central	Yes	No
	%	%	%	%	%	%	%	%	%	%	%	%
News/mainstream media												
Television – news/current affairs programs	50	46	53	29	47	73	60	49	47	47	42	53
Printed newspaper articles	32	33	31	11	31	55	34	26	34	31	22	37
Radio – news/current affairs programs	27	28	26	13	27	41	33	29	29	22	21	30
Radio – non-news programs	24	27	20	12	24	35	26	18	22	26	18	26
Online news websites	21	21	21	20	25	19	16	21	22	23	22	21
Television – non-news programs	19	20	17	11	20	26	21	22	16	19	17	19
Other channels - 15+% awareness												
Word of mouth	35	30	39	36	33	35	41	28	36	33	34	35
'Local Cluster' (any in category)	25	29	21	25	22	29	29	11	32	22	22	26
Social media	17	16	18	27	15	9	23	13	18	14	20	15
Sample size	536	273	263	172	176	188	135	128	139	134	143	387

Q4. Where have you seen, heard or read anything about the development of a new major airport in Sydney?
 Base: Those who have seen, heard or read anything about the development of a new major airport in Sydney (n=536)
 Highlighting statistically significantly **higher** and **lower** results between groups

Key differences between demographic groups in February-March 2018 were as follows (Table 21):

- access through traditional television, radio and newspaper channels increased with age, while access through social media decreased with age
- access through 'word of mouth' was higher for female residents than male residents
- access information through printed newspaper articles was lower for culturally and linguistically diverse residents than for other residents
- access through a 'local cluster' channel was lowest among residents in Inner West region.

There was also consistency with the earlier two surveys in 2017 for culturally and linguistically diverse background residents to be less likely overall to access information from television news and radio news channels. These overall patterns associated with cultural background were still evident when taking age into account.

Table 22: Channels of awareness of the development of a new major airport, by region (Feb-Mar 2018 and comparison with Sep-Oct 2017 and May-June 2017)

Channels	REGION											
	Feb-Mar 2018				Statistically significant change from May-Jun 17 (BW) / Sep-Oct 17 (W2)							
	South West	Inner West	North West	West Central	South West	Inner West	North West	West Central	South West	Inner West	North West	West Central
	%	%	%	%	BW %	W2 %	BW %	W2 %	BW %	W2 %	BW %	W2 %
Television – news/current affairs programs	60	49	47	47	-	-	-	-	-	-	-	-
Word of mouth	41	28	36	33	-	-	-	-	-	-	-	-
Printed newspaper articles	34	26	34	31	-	-	-	-	-	-	-	-
Radio – news/current affairs programs	33	29	29	22	-	-	-	-	-	-	-	-
Radio – non-news programs	26	18	22	26	-	-	-	-	-	-	-	-
Online news websites	16	21	22	23	-	-	-	-	-	-	-	-
Television – non-news programs	21	22	16	19	-	-	-	-	-	-	-	-
Social media	23	13	18	14	-	-	-	-	-	-	-	-
Through my local council	14	2	16	10	-	-	-	-	-	-	-	-
From local community groups	9	4	15	5	-	-	-	-	-	-	-	-
Information provided by my local MP	8	2	12	7	-	-	-	-	-	-	-	-
Information stands at local events	6	3	6	8	-	-	-	-	-	-	-	+7
Sample size	135	128	139	134								
Highlighting statistically significantly higher and lower results	between regions in Feb-Mar 2018				comparing each region with May-Jun 2017 / Sep-Oct 2017							

Q4. Where have you seen, heard or read anything about the development of a new major airport in Sydney?

Base: Those who have seen, heard or read anything about the development of a new major airport in Sydney (n=536)

Showing main channels and lower incidence channels where changes occurred

In February-March 2018 there was a trend for residents in South West region to be the most likely to refer to 'television news/current affairs' and 'word of mouth' as sources of information, consistent with September-October 2017 (Table 21). The higher access through 'word of mouth' is likely to reflect local discussion given that the airport is being built in that region. There were also some differences between regions in accessing specific local sources:

- residents in North West region were most likely to nominate a local community group
- residents in Inner West region were least likely to nominate a local council or local MP.

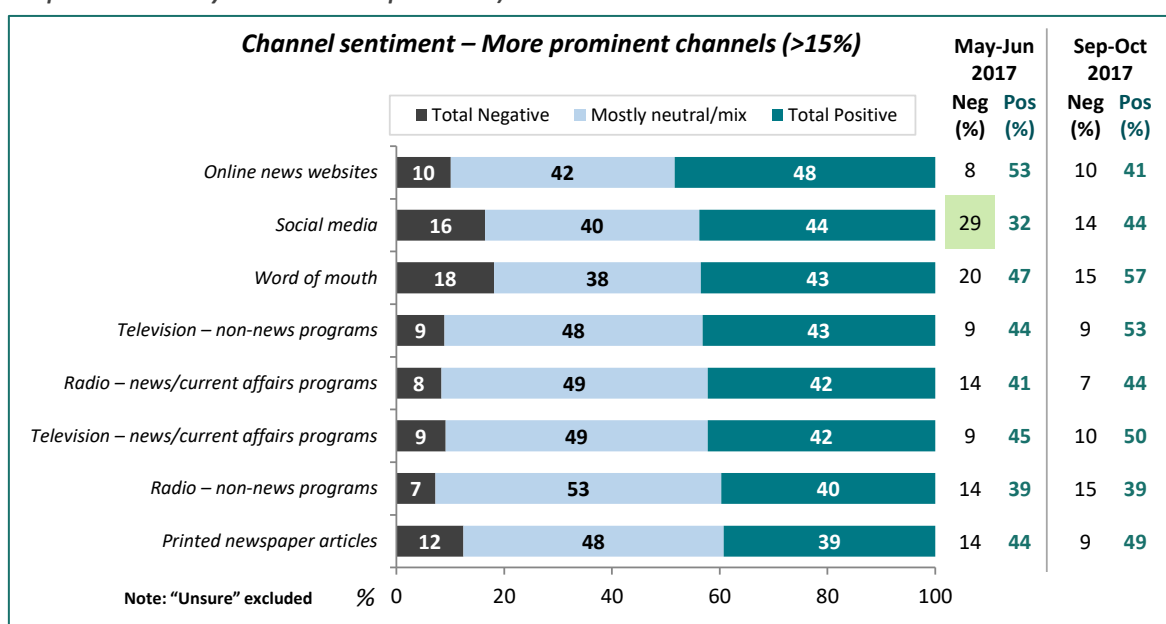
Overall nomination of information stands at local events, while continuing to be low, had increased significantly from September-October 2017 in West Central (from 1% to 8%).

5.3. Sentiment of Channel Content

Residents who had heard, seen or read something about the new major airport in Sydney were asked for each source how positive or negative the content of the information had generally been over the last three months. For the major sources of information in February-March 2018 (nominated by over 15%), the share of positive sentiment was in a relatively narrow range of 39% to 48% (Figure 21). Negative sentiment was of a smaller share, in the range of 7% to 18%.

Overall, online news websites was the channel most likely to be rated as positive (48%). Both social media and 'word of mouth' had similar higher positive sentiment (44% and 43% respectively) but also relatively high negative incidence (16% and 18%). Negative sentiment of content for social media had reduced significantly from May-June 2017 (29%).

Figure 21: Sentiment of content of main communication channels (higher than 15% exposure) (Feb-Mar 2018, and comparison with May-Jun 2017 and Sep-Oct 2017)



Q5. Thinking about the last three months, please select overall how positive or negative the content in the source below has been regarding the development of a new major airport in Sydney.

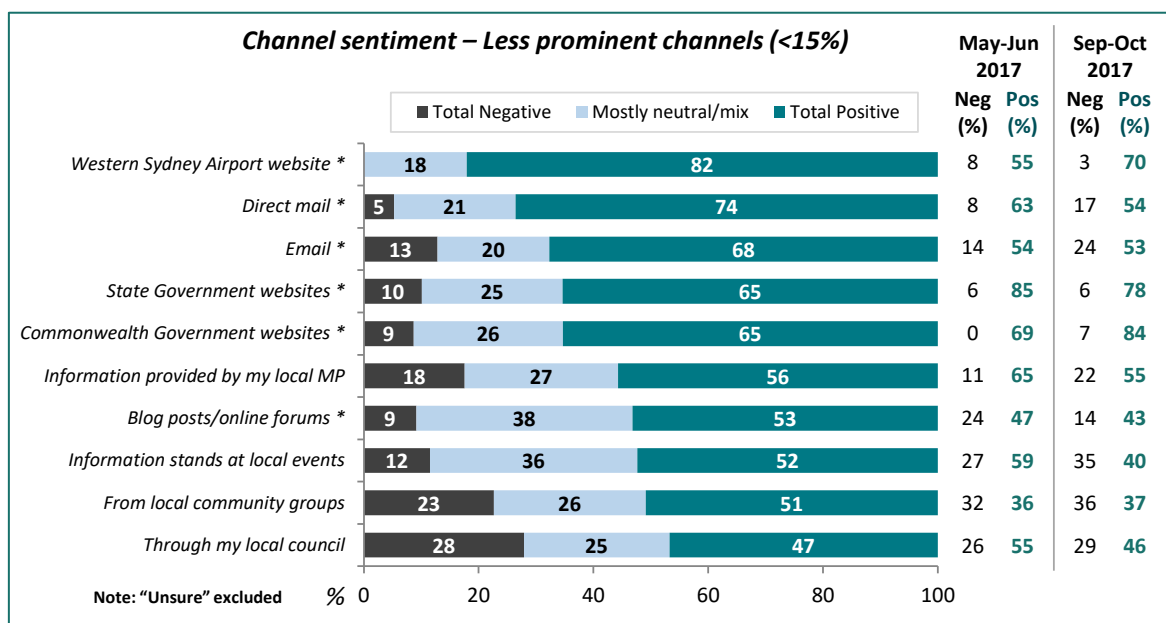
Base: Those who had seen, heard or read anything via the respective channel (n=80-243)

Highlighting a statistically significant **improvement** or **decline** in average sentiment

Figure 22 on the next page shows the sentiment ratings of the content for sources of information that were accessed by less than 15% of residents aware of the airport in February-March 2018. Sources with sample sizes less than 50 are noted. There was similar positive sentiment among the three sources with higher sample sizes: information stands at local events (52%), local community groups (51%) and local council (47%), with the latter two more polarised with higher negative sentiment (23% and 28% respectively). There were no changes measured from the earlier surveys.

Figure 23 on the next page shows a weighted average distribution of negative, neutral/mixed and positive sentiment for four overall categories of channels, ordered on decreasing positive sentiment. 'Word of mouth' has been included with local sources, although that channel does represent the largest share of ratings within the category.

Figure 22: Sentiment of content of other communication channels (lower than 15% exposure) (Feb-Mar 2018, and comparison with May-Jun 2017 and Sep-Oct 2017)

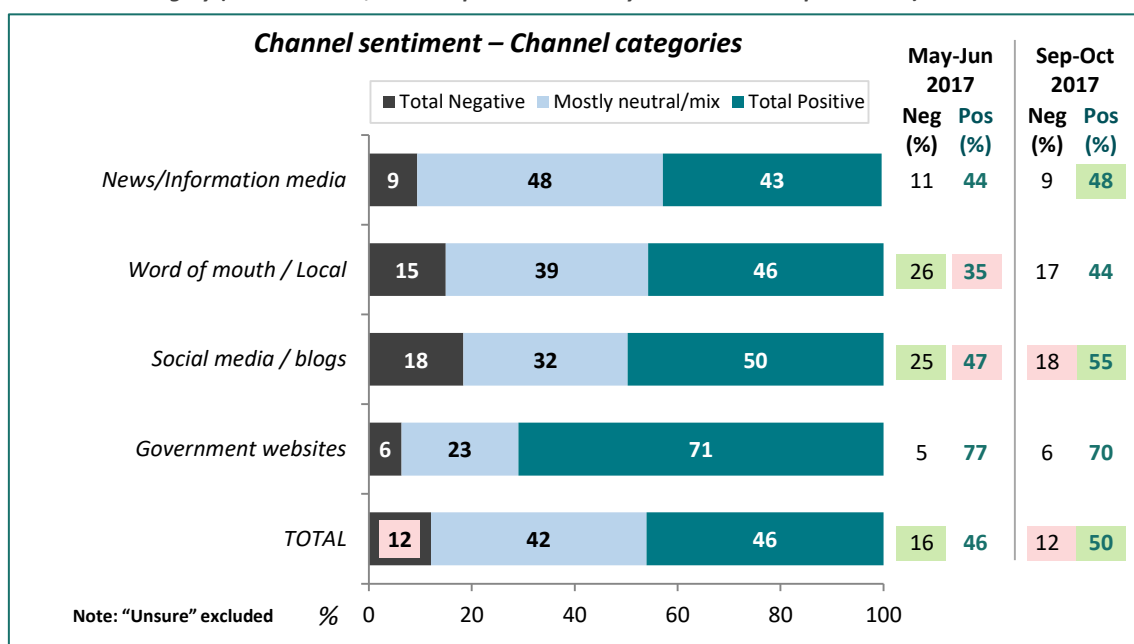


Q5. Thinking about the last three months, please select overall how positive or negative the content in the source below has been regarding the development of a new major airport in Sydney.

Base: Those who had seen, heard or read anything via the respective channel (n=19-53)

* Sample size less than 30

Figure 23: Sentiment of content of communication channel categories: weighted average based on channel usage within each category (Feb-Mar 2018, and comparison with May-Jun 2017 and Sep-Oct 2017)



Q5. Thinking about the last three months, please select overall how positive or negative the content in the source below has been regarding the development of a new major airport in Sydney.

Base: Those who had seen, heard or read anything – channel categories (Feb-Mar 2018: n=81-945 ratings)

Highlighting a statistically significant **improvement** or **decline** in average sentiment

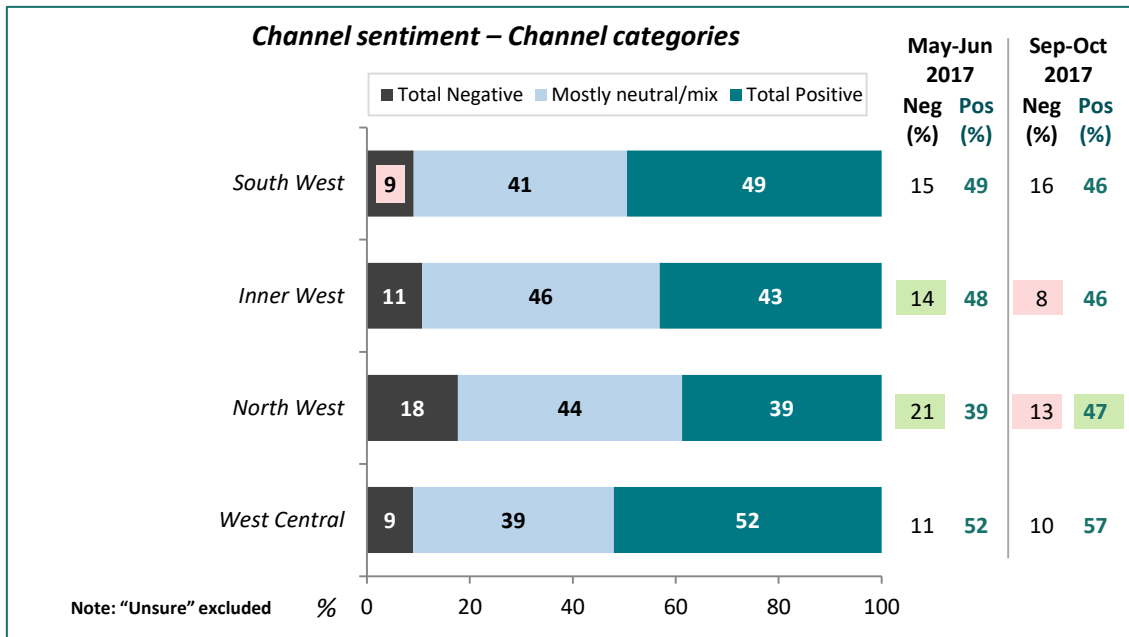
In February-March 2018, about half (46%) of the information sources had positive average sentiment, with a small minority (12%) negative (Figure 23). The results were broadly similar to September-October 2017, and showed a slight improvement in negative sentiment compared with May-June 2017 (16%). Government websites continued to have the most positive sentiment (71%); as well as the lowest incidence of negative sentiment (6%).

Both ‘word of mouth/local’ and ‘social media/blogs’ channel categories had more distributed sentiment profile, with a relatively higher negative incidence (15% and 18% respectively). The negative incidence has maintained the reduction seen in September-October 2017 (17% and 18%) compared May-June 2017 (26% and 25%). Around half the ratings for both these channel categories had positive sentiment, while ‘social media/blogs’ was slightly less positive (50%) than in September-October 2017 (55%).

Looking at the overall weighted profile of ratings across the regions, the most positive profile was again found in West Central region (52% positive), similar to the previous two surveys in 2017 (52%–57%) (Figure 24). About half (49%) were also positive in South West region. The share of positive sentiment was slightly lower at around two-fifths in both Inner West region (43%) and North West region (39%), with the latter showing some decrease from September-October 2017 (47%).

Negative sentiment was highest in North West region (18%), and had increased slightly compared with September-October 2017 (13%).

Figure 24: Sentiment of content of communication channels by region: weighted average based on usage of channels (Feb-Mar 2018, and comparison with May-Jun 2017 and Sep-Oct 2017)



Q5. Thinking about the last three months, please select overall how positive or negative the content in the source below has been regarding the development of a new major airport in Sydney.

Base: Those who had seen, heard or read anything – ratings of all channels (Feb-Mar 2018: n=312-438 ratings)

Highlighting a statistically significant **improvement** or **decline** in average sentiment

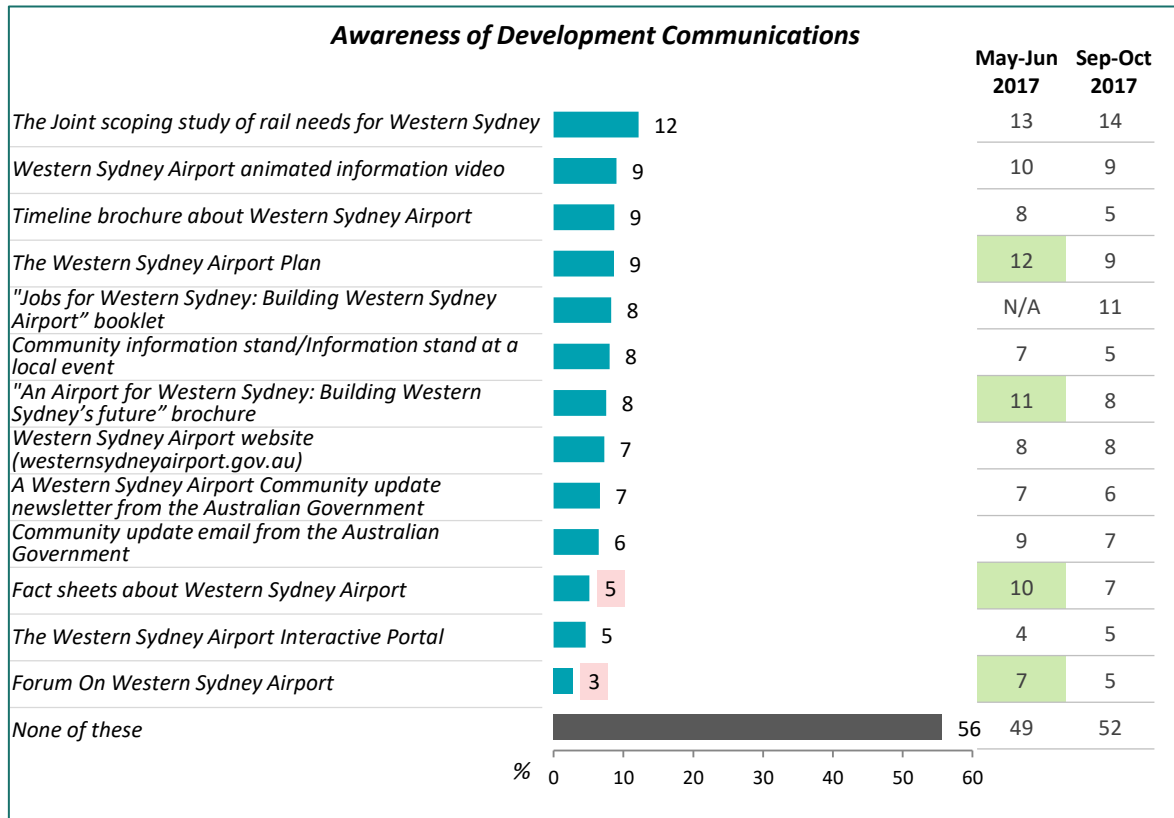
5.4. Awareness of Government Initiatives and Communications

Residents aware of a new Western Sydney Airport being developed were asked if they had seen or heard of any of a prompted list of Australian Government initiatives and communication releases. The online survey included images of the communications, while the telephone survey had extended descriptions to assist with recognition. Awareness of the initiatives and communications in February-March 2018 was in the range of 3% to 12%, with the highest result continuing to be for the 'Joint scoping study of rail needs for Western Sydney' (12%) (Figure 25).

There has been some decline in awareness in February-March 2018 compared with May-June 2017, including for:

- The Western Sydney Airport Plan (from 12% to 9%)
- 'An Airport for Western Sydney: Building Western Sydney's future' brochure (from 11% to 8%)
- Fact sheets about Western Sydney Airport (from 10% to 5%)
- Forum on Western Sydney Airport (from 7% to 3%).

Figure 25: Awareness of Australian Government initiatives and communications (Feb-Mar 2018, and comparison with May-Jun 2017 and Sep-Oct 2017)



Q6. Which of the following initiatives and communications from the Australian Government about the new airport at Badgerys Creek have you seen or heard about before today?

Base: Those who have seen, heard or read anything about the development of a new major airport in Sydney (n=536)

The only significant differences between the regions in February-March 2018 in awareness of the initiatives and communications were for the following (Table 23):

- West Central region:
 - more likely to report awareness of the 'Timeline brochure about Western Sydney Airport' (14% vs. 4%–9% in the other regions)
- North West region:
 - more likely to report awareness of 'Western Sydney Airport website' (12% vs. 4%–6% in the other regions)

In February-March 2018, overall awareness of any initiative and communication was again lower in Inner West region (66% recalled none of the initiatives vs. 52%–56% in the other regions).

Table 23: Awareness of initiatives and communications from the Australian Government, by region (Feb-Mar 2018)

Heard of developments	TOTAL	Region			
		South West	Inner West	North West	West Central
	%	%	%	%	%
<i>The Joint scoping study of rail needs for Western Sydney</i>	12	9	13	13	13
<i>Western Sydney Airport animated information video</i>	9	12	9	8	9
<i>Timeline brochure about Western Sydney Airport</i>	9	9	5	4	14
<i>The Western Sydney Airport Plan</i>	9	11	7	11	6
<i>"Jobs for Western Sydney: Building Western Sydney Airport" booklet</i>	8	7	10	8	9
<i>Community information stand/Information stand at a local event</i>	8	8	3	10	8
<i>"An Airport for Western Sydney: Building Western Sydney's future" brochure</i>	8	4	5	9	8
<i>Western Sydney Airport website (westernsydneyairport.gov.au)</i>	7	6	6	12	4
<i>Western Sydney Airport Community update newsletter (Australian Government)</i>	7	7	2	7	8
<i>Community update email from the Australian Government</i>	6	6	4	5	9
<i>Fact sheets about Western Sydney Airport</i>	5	3	5	7	4
<i>The Western Sydney Airport Interactive Portal</i>	5	1	4	6	5
<i>Forum on Western Sydney Airport</i>	3	1	2	3	4
<i>Sample size</i>	536	135	128	139	134

Base: Those who have seen, heard or read anything about the development of a new major airport in Sydney (n=536)

Q6. Which of the following initiatives and communications from the Australian Government about the new airport at Badgerys Creek have you seen or heard about before today?

Highlighting statistically significantly higher and lower results between the regions

There were some changes in specific awareness compared with May-June 2017 in the following regions:

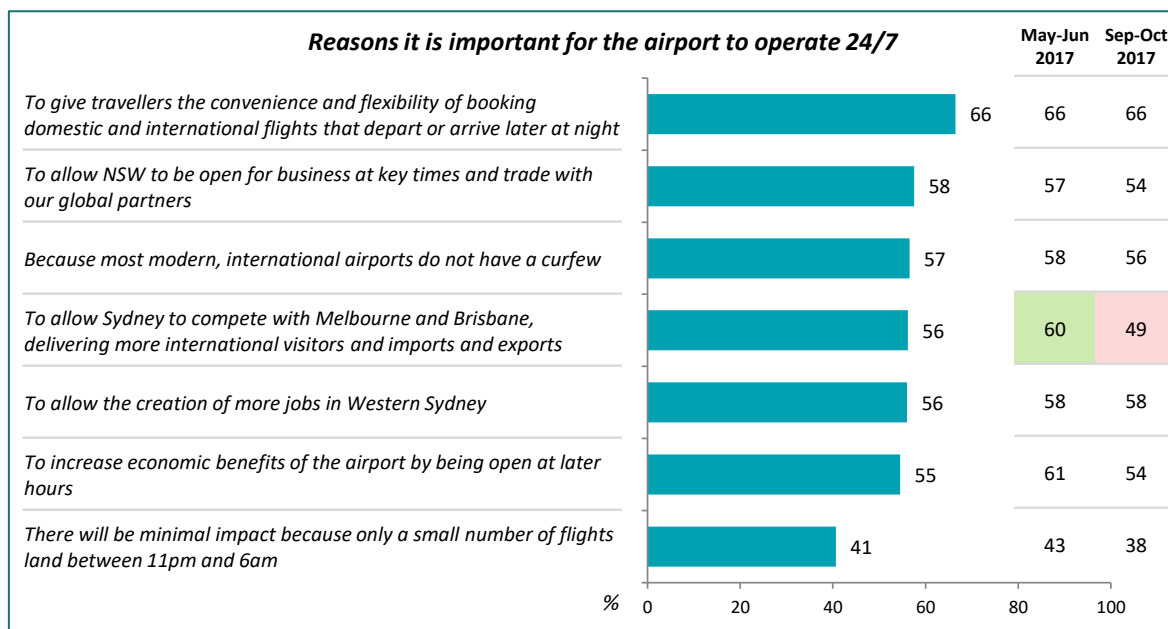
- increase in West Central region:
 - 'Timeline brochure about the Western Sydney Airport' (from 7% to 14%).
- decreases in South West region:
 - 'An Airport for Western Sydney: Building Western Sydney's future' brochure (from 13% to 4%)
 - 'Fact sheets about Western Sydney Airport' (from 11% to 3%)
- decrease in North West region:
 - 'Fact sheets about Western Sydney Airport' (from 13% to 7%).

5.5. Reasons for Operating 24 Hours a Day, 7 Days a Week

The perception of importance of Western Sydney Airport operating '24 hours a day, 7 days a week', rather than under a curfew, had decreased in February-March 2018 (see Table 13 earlier in Section 4.3). Residents who indicated at least some importance (rating of 6-10) were asked to select reasons why. Two-thirds (66%) continued to nominate the importance of giving travellers the convenience and flexibility of booking flights that arrive or depart at a later time. The statements around economic benefits and competing with other international airports were nominated by over half (55%–58%) (Figure 26). Only the statement about minimal impact at night was nominated by less than half of the group (41%).

The results were broadly similar to the previous two waves in 2017, with agreement with the airport competing with Melbourne and Brisbane (56%) improving after a slightly lower result in September-October 2017 (49%).

Figure 26: Perceptions of reasons why it is important for operation 24 hours a day, 7 days a week (Feb-Mar 2018 and comparison to Sep-Oct 2017 and May-Jun 2017)



Q11. Why do you believe it is important for Western Sydney Airport to operate 24 hours a day, 7 days a week? Please select all the reasons below that apply.

Base: Rated 6-10 on importance of Western Sydney Airport to not be restricted by a curfew (n=279)

Highlighting statistically significantly **higher** and **lower** results between the survey waves

As the incidence of residents nominating operating '24 hours a day, 7 days a week' as important was relatively low, the reasons nominated within each region were averaged over the September-October 2017 and February-March 2018 surveys to give more stable results for comparison (Table 24). The results continued to be mostly uniform across the regions, with the main difference again a lower nomination of job creation in Western Sydney by residents in Inner West region (47% vs. 59% to 60%), possibly reflecting the lower engagement of residents in this region with Western Sydney.

Residents who rated importance as lower (rating 0-3) for operation '24 hours a day, 7 days a week' were asked to provide reasons why. The reasons again fell into four main categories, which were similarly nominated in all three surveys in the current series (Figure 27). In February-March 2018:

- over two-fifths (42%) of this group of residents nominated a *concern about noise*, including close to one-quarter (23%) saying that it would create too much noise generally

- close to half (47%) mentioned a reason on *not being necessary* to operate without a curfew, mostly making reference to some aspect of Sydney Airport
- over one-third (37%) referred to a *negative impact* or *being unfair* on the community
- the smallest topic area (7%) covered other *impacts on the environment*, mainly air pollution.

Table 24: Perceptions of reasons why it is important for operation 24 hours a day, 7 days a week, by region (average of Sep-Oct 2017 and Feb-Mar 2018)

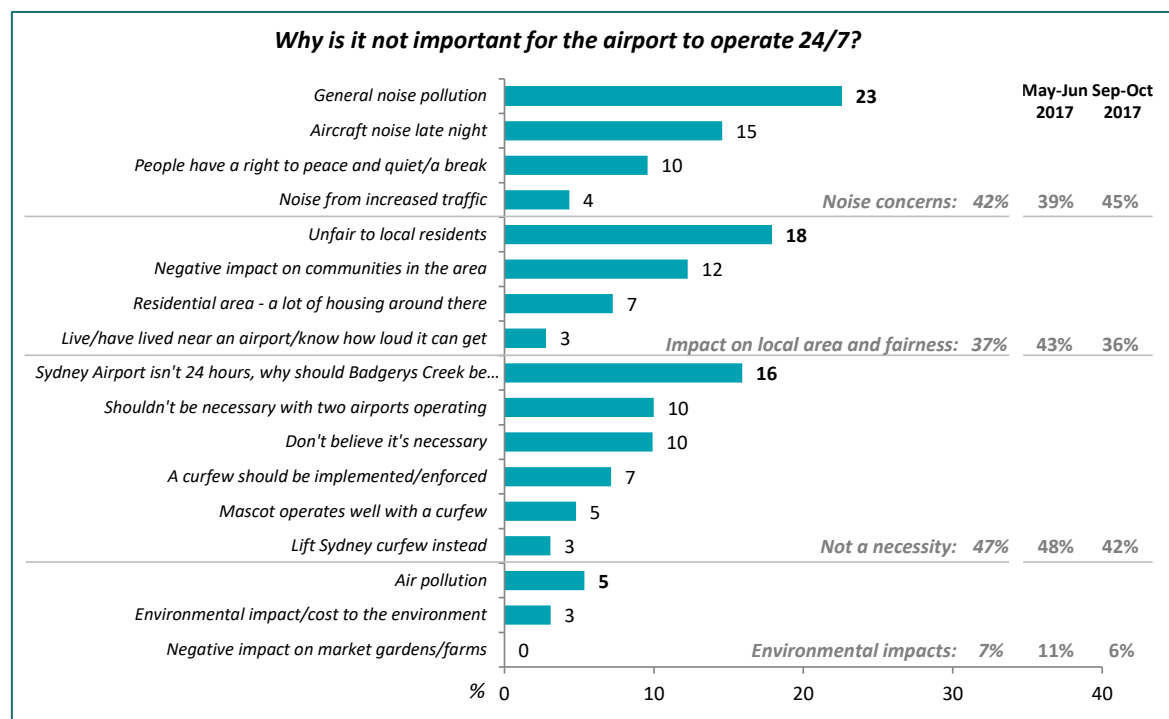
Heard of developments	Average of Sep-Oct 2017 and Feb-Mar 2018			
	South West	Inner West	North West	West Central
	%	%	%	%
To give travellers the convenience and flexibility of booking domestic and international flights that depart or arrive later at night	66	62	72	64
To allow the creation of more jobs in Western Sydney	60	47	59	59
Because most modern, international airports do not have a curfew	64	52	55	56
To allow NSW to be open for business at key times and trade with our global partners	54	51	62	53
To increase economic benefits of the airport by being open at later hours	51	50	55	56
To allow Sydney to compete with Melbourne and Brisbane, delivering more international visitors and imports and exports	53	51	54	51
There will be minimal impact because only a small number of flights land between 11 pm and 6 am	40	39	37	41
Sample size	140	148	147	154

Q11. Why do you believe it is important for Western Sydney Airport to operate 24 hours a day, 7 days a week? Please select all the reasons below that apply.

Base: Those who provided a rating of 6-10 in agreeing that it is important for Western Sydney Airport to not be restricted by a curfew – average of Feb-Mar 2018 and May-June 2017 results (n=589)

Highlighting statistically significantly **higher** and **lower** results between the regions

Figure 27: Perceptions of reasons why it is not important for operation 24 hours a day, 7 days a week (Feb-Mar 2018, and comparison with May-Jun 2017 and Sep-Oct 2017)



Q11B. Why do you believe that it is not important for Western Sydney Airport to be operating 24 hours a day, 7 days a week? Please type your response in the space provided.

Base: Those who rated 0-4 in disagreeing that it is important for Western Sydney Airport to not be restricted by a curfew (n=217)

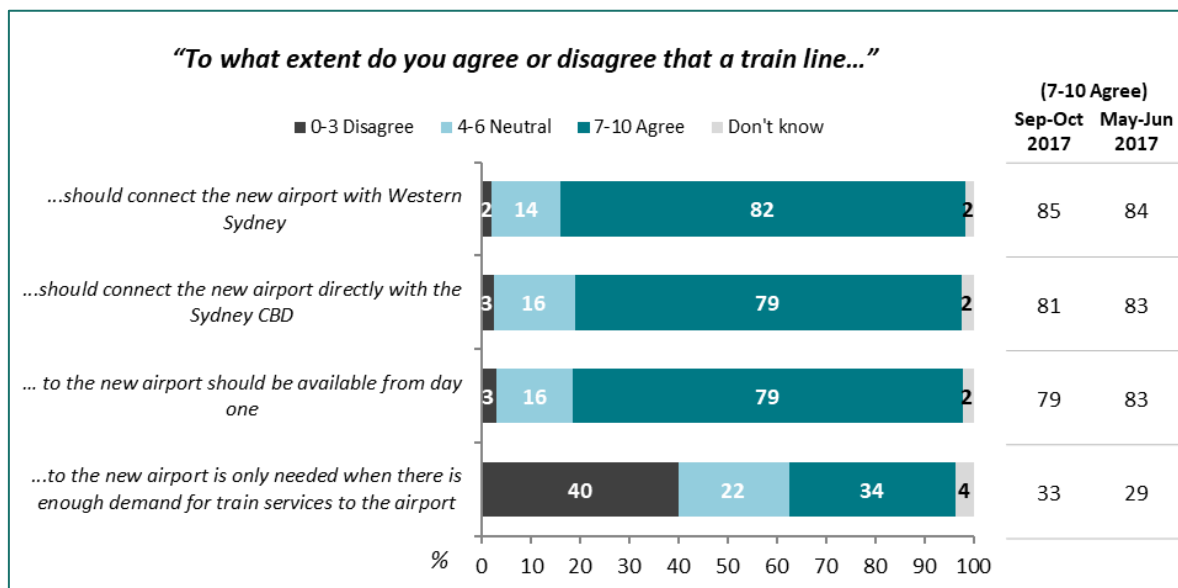
5.6. Rail Link

Residents were provided some background information regarding the Australian and NSW governments' joint scoping study into the rail needs of Western Sydney to determine the aspects of building a rail link to the new airport. They were asked if they agreed or disagreed with four randomised statements. There continued in February-March 2018 to be very high levels of agreement (rating 7-10) that the rail link (Figure 28):

- should connect the new airport with Western Sydney (82%)
- should connect the new airport directly with the Sydney CBD (79%)
- to the new airport should be available from day one (79%).

Each of these statements had very low proportions (2-3%) of residents disagreeing (rating 0-3). Compared with these statements, there was less agreement (34%) with the statement that *a train line to the new airport is only needed when there is enough demand for train services to the airport*. This statement, being less definitive and specific in nature, was met with a more balanced set of responses. Two-fifths (40%), however, disagreed, indicating a large minority more strongly considering that the rail link should be part of the initial development.

Figure 28: Attitudes towards operation of rail link to Western Sydney Airport (Feb-Mar 2018, and comparison with May-Jun 2017 and Sep-Oct 2017)



Q12. Using a scale of 0 to 10 where 0 means strongly disagree and 10 means strongly agree, to what extent do you agree or disagree with the statement below?

Base: All Feb-Mar 18, n=613; (Sep-Oct 17, n=615; May-Jun 17, n=1,244)

Comparing perceptions of the rail link across the regions showed an increase in agreement in February-March 2018 in Inner West region about 'availability from day one' compared with the two earlier surveys (Table 25). Perceptions in Inner West region were now overall the most positive particularly around 'availability from day one' and connecting 'directly with the Sydney CBD' (both with 90% agreeing vs. 75-81% in the other regions).

Residents in West Central region were most likely to agree (40%) that the rail link is only needed when there is enough demand in both the February-March 2018 and September-October 2017 surveys, confirming a significant difference.

Table 25: Attitudes towards operation of rail link to Western Sydney Airport, by region (Feb-Mar 2018 and comparison with Sep-Oct 2017 and May-June 2017)

Agreement: A train line ...	REGION											
	Feb-Mar 2018				Statistically significant change from May-Jun 17 (BW) / Sep-Oct 17 (W2)							
	South West	Inner West	North West	West Central	South West	Inner West	North West	West Central	South West	Inner West	North West	West Central
<i>Rated 7-10</i>	%	%	%	%	BW %	W2 %	BW %	W2 %	BW %	W2 %	BW %	W2 %
... to the new airport should be available from day one	81	90	75	78	-	-	+9	+12	-	-	-	-
... should connect the new airport directly with the Sydney CBD	81	90	75	76	-	-	-	-	-	-	-	-
... should connect the new airport with Western Sydney	83	89	79	82	-	-	-	-	-	-	-	-
... to the new airport is only needed when there is enough demand for train services to the airport	32	26	31	40	-	-	-	-	-	-	-	-
Sample size	150	151	155	157								
Highlighting statistically significantly higher and lower results:	between regions in Feb-Mar 2018				comparing each region with May-Jun 2017 / Sep-Oct 2017							

Q12. Using a scale of 0 to 10 where 0 means strongly disagree and 10 means strongly agree, to what extent do you agree or disagree with the statement...?

Base: All (Feb-Mar 18, n=613; Sep-Oct 17, n=615; May-Jun 17, n=1,244)

6 Conclusions and Recommendations

6.1. Conclusions

Awareness of Western Sydney Airport

In February-March 2018, a large majority (87%) of Western Sydney residents had seen or heard something about the development of a new major airport, including close to half (47%) saying they had heard 'quite a lot' or 'a great deal' about it. This latter incidence was similar to the benchmark survey in May-June 2017 (48%), following a small decline in September-October 2017 (42%) which occurred particularly in South West region and North West region. A key topic mentioned spontaneously as being seen or heard about the airport was confirmation of construction, particularly the location at Badgerys Creek, similar to the earlier two surveys.

When prompted, the majority of those aware of the airport had heard that the site is in Western Sydney (75%), which had not changed significantly since the May-June 2017 benchmark; that the Australian Government is building the airport (51%), continuing a small decrease from the benchmark (57%); and that roads will be improved to support the new airport (53%).

The results suggest that ongoing coverage of the development of the airport has influenced an improvement in awareness in February-March 2018, particularly in South West region and North West region. The increase in awareness in Inner West region seen in September-October 2017, however, was not maintained.

Key measures of community sentiment

There were some decreases in February-March 2018 in positive sentiment towards the airport on key measures of *favourability* of the airport and *positive benefits outweighing any negative impacts*. The majority of residents of Western Sydney held a positive position on each (60% and 56% respectively), but five percentage points below the average across May-June 2017 and September-October 2017 (65% and 61% respectively). Positive sentiment had increased particularly in South West and West Central regions in the earlier surveys, and positive sentiment was at a similar level across the regions on both these measures in February-March 2018.

The level of *concern about a negative impact* of building the airport (33% agreeing) remained at a similar level to September-October 2017 (32%), and was also at a similar level across the regions. The level of agreement in South West region remained below the relatively high results in December 2016 in (42%) and North West region (40%).

Agreement with the *importance of 24/7 operation* also decreased in February-March 2018 (40%) from the average of the earlier two surveys (46%), and the lowest result of all surveys conducted since 2015. Close to one-third (31%) of residents disagreed with the importance of 24/7 operation, but the community continued to show some indecision on the issue, with over one-quarter (30%) being either neutral or unsure of its importance. Disagreement in February-March 2018 was highest in North West region (40%).

Perceived barriers and motivators

Concerns

Important areas of concern among Western Sydney residents continued to encompass traffic, noise and other environmental impacts. Over half of residents expressed concern in February-March 2018 about several issues presented, similar to the earlier surveys:

- increase in traffic both during construction (55%) and once running (56%)
- noise late at night and early in the morning if the airport operates 24 hours a day (56%)
- general noise pollution once running (56%).

There were no significant changes in overall levels of concern compared with the waves in 2017.

Benefits

Key benefits of a new airport in Western Sydney that were acknowledged by three-fifths or more of residents in February-March 2018, and both waves in 2017, included economic gains for the area and Sydney's global competitiveness. There had, however, been declines for three of these benefits from the May-June 2017 benchmark which are also highlighted in the following list. Key benefits were that the airport:

- will bring jobs to the region (73% in February-March 2018)
- is needed to support the current airport at Mascot (64%, down from 71%)
- is necessary to maintain and grow Sydney's global competitiveness (64%)
- will boost business and tourism in Western Sydney (62%, down from 72%)
- is necessary to support Western Sydney's growing population and economy (61%, down from 67%).

Relationship with favourability of the airport

It was found that an attitudinal dimension associated with *perceptions of the benefits and improvements* was much more strongly related with *favourability* than attitudinal dimensions associated with *noise/traffic/environmental issues* and with *other concerns*.

Informing the community

The majority (60%) of Western Sydney residents in February-March 2018 continued to see it as important to be informed about progress of Western Sydney Airport, with one in ten (10%) considering it of low importance. Consideration of importance was lowest in Inner West region (49%).

The top four unpaid channels in February-March 2018 for information about the airport's development, among those perceiving some importance, included media coverage (nominated by 64%), a website dedicated to the airport (39%), local council (38%) and state government websites (37%). There had been a decline in nomination of several sources in September-October 2017, but results in February-March 2018 reverted to similar levels in May-June 2017, possibly related to increased interest and attention as the airport development progresses.

The positive response to the dedicated website was in contrast to the relatively low report of the current website having been a source of information about the airport (5%).

6.2. Recommendations

The core recommendations from the May-June 2017 benchmark and September-October 2017 waves continue to be relevant following the February-March 2018 survey. These have been updated based on further developments on key measures.

Key findings	Recommendations
Understand current levels of awareness and sources of information for Western Sydney Airport	
<ul style="list-style-type: none"> The large majority of residents were aware of the airport, with recovery of reporting knowing at least 'quite a lot' after some decline earlier in 2018. There is scope to increase knowledge progressively and, importantly, to maintain knowledge, particularly as further developments in construction etc. occur. Overall knowledge was lower among residents aged under 55 years, and residents in Inner West region. Awareness continued to be strongest about the site being in Western Sydney, that the Australian Government is building the airport, and that roads will be improved to support the airport. The most common reported sources for information are mainstream media including television, print newspapers and radio; and 'word of mouth'. 	<ul style="list-style-type: none"> Utilising media releases and other promotional activity which can be reported in news programs and articles provides the potential to reach the general population effectively, and maintain awareness and knowledge of the airport development. Such activity can generate, and be built on, by 'word of mouth' communication. Communication should be enhanced to reach residents aged under 55 years, to improve overall knowledge about the airport. Awareness is strongest around the airport's location, and there is opportunity to improve knowledge about upgrades/improvements in Western Sydney and economic growth. Awareness of such a major infrastructure development can generate the expectation of hearing more information, particularly when changes start to occur, and there is an opportunity to build stronger positive sentiment and understanding of benefits.
Explore current levels of community perceptions of the airport	
<ul style="list-style-type: none"> There has been some decline in positive sentiment towards the new airport, including the level of favourability and benefits outweighing negative impacts compared with 2017. Agreement with the importance of the airport operating 24/7 has also decreased, and remains below earlier measures in 2015 and 2016. Agreement continues to be relatively mixed on this issue with a significant minority undecided. Strong interest and expectation for a rail link continues to be expressed, including operation from 'day one'. 	<p>FAVOURABILITY</p> <ul style="list-style-type: none"> Key groups to target, viewing the airport less favourably, include female residents and those aged 18-34 years. As noted under the next objective below, key areas to communicate are benefits and improvement to the economy and infrastructure in Western Sydney, as well as broader benefits to Sydney. <p>24/7 OPERATION</p> <ul style="list-style-type: none"> Key groups to target, viewing 24/7 operation as less important, include female residents, those aged 55 years and over, and those in North West region. Communications should include Information about the necessity of 24/7 operation, reasons for differing from the operation of Sydney Airport, and how issues associated with noise are being addressed. Consideration of 24/7 operation will be of greater relevance to future communications when flight paths are publicised. <p>RAIL LINK</p>

	<ul style="list-style-type: none"> Information about the implementation of a rail link should be communicated to residents, including the reasons for the path being taken.
Identify the perceived barriers and motivators towards a positive perception of the airport	
<ul style="list-style-type: none"> Western Sydney residents continue to have some concern that the airport will have a negative impact on the region. Key areas of concern continue to be associated with increase in traffic and noise, and other environmental impacts, both during and after construction. Key benefits continue to be economic gains for the area, including jobs and business/tourism, as well as Sydney's global competitiveness. Perceptions of the benefits and improvements to the economy and infrastructure are much more strongly related to being in favour of the airport than the environmental impacts. The small decline in overall favourability of the airport was accompanied by decline in a positive view of some benefits, including supporting a growing population and economy, and boosting business and tourism. 	<ul style="list-style-type: none"> Communications need to provide information about the expected benefits to the economy and infrastructure in the area, and to the broader benefits for Sydney, particularly based on results of similar infrastructure development. Key issues to address include those showing a decline in positive sentiment: how the airport will support a growing population and economy, how it will boost business and tourism, and how it will support Mascot airport. Communications should also include results of the final Environmental Impact Statement and other reports which provide factual, evidence-based information about impacts, and the steps being taken to address them.
Identify preferred (unpaid) channels for communication	
<ul style="list-style-type: none"> Television news/current affairs programs printed newspaper articles continue to be relatively strongly reported overall as media sources of information about the airport Local sources and social media are among the more common sources for residents aged 18-34 years. A dedicated airport website continues to be well-received as a source of information, but reported use continues to be very low. A second tier of preferred channels include state government websites, local councils and social media. 	<ul style="list-style-type: none"> There is some opportunity to build on sources that are more successfully providing recent information about the airport. For younger residents, these include some traditional sources (television news/current affairs), local sources and social media. A way to promote the website should be developed, potentially through social media or in co-operation with councils.

7 Appendix

The table below shows the nominal 95% confidence interval for different sample sizes, based on a survey result of 50%, assuming random sampling and no impact of weighting. The calculation includes a continuity correction.

Table 26: Summary of nominal 95% confidence intervals for sample sizes

Group sample size	Nominal 95% confidence interval
1200	±2.87
1100	±3.00
1000	±3.15
900	±3.32
800	±3.52
700	±3.77
600	±4.08
500	±4.48
400	±5.02
300	±5.82
200	±7.17
150	±8.33
100	±10.29
50	±14.85