



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



Department of Infrastructure and Regional Development

***Western Sydney Airport Evaluation Research
Quantitative Benchmark Report – May-June 2017***

Final Report

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1 Executive Summary

1.1 Background

The Communications and Stakeholder Engagement Section within the Western Sydney Unit (WSU) in the Department of Infrastructure and Regional Development is responsible for implementing the Western Sydney Airport Project Communications and Stakeholder Engagement Strategy (the Strategy). The Strategy progressively takes into account project developments such as the determination of the Western Sydney Airport Plan in December 2016 and the announcement that the Australian Government will deliver and invest in the Western Sydney Airport (the airport) in May 2017. WSU's communications tasks will 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 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 the 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.

1.1. Research Method

Survey research has been conducted over the period November 2014 to December 2016 to track awareness of and sentiment towards the Western Sydney Airport, among residents of Western Sydney. A new survey series was launched in May-June 2017 to continue the tracking process. The May-June 2017 survey was of 1,244 residents of Western Sydney, and included online and telephone survey methods to give a broad coverage of the area. Western Sydney was divided into four regions for analysis, based on pre-2016 local government areas:

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

1.2. Key Findings

Awareness of Western Sydney Airport

The large majority (91%) of Western Sydney residents had seen or heard something about the development of a new major airport, with around half (48%) saying they had heard quite a lot or a

great deal about it. This latter level of awareness was marginally higher among males, those aged 55 years and over, and in the South West and North West regions.

A key topic mentioned spontaneously as being seen or heard about the airport was confirmation of construction, particularly the location at Badgerys Creek. When prompted, the majority of those aware of the airport had heard that the site is in Western Sydney (76%), the Australian Government is building the airport (57%), and roads will be improved to support the new airport (51%).

Key channels reported as sources of information about the airport were mainstream media, including television (55%), printed newspaper articles (32%) and radio news/current affairs (31%). Social media was mentioned by around one-fifth (18%), primarily Facebook. The Western Sydney Airport website was nominated by less than one in ten (6%).

Key measures of community sentiment

There were some increases in May-June 2017 in positive sentiment towards the airport on key measures of *favourability*, and *positive benefits*, with the majority of the residents of Western Sydney holding a positive position on each, and up to one in ten holding a negative position. While there was some decrease in *concern about a negative impact* of building the airport, more people disagreed with the *importance of 24/7 operation*.

Favourability

Around two thirds (67%) of Western Sydney residents in May-June 2017 were favourable to the new airport being at Badgerys Creek. Those in favour had increased from December 2016 (56%). Most of the increase in favourability was from a reduction in those unsure, indicating an impact of media and other informational activity. Some increase in favourability was evident across gender, age groups and regions, with a greater increase in the South West and West Central regions. While there was now a more even level of agreement across the regions, residents in the South West and North West regions were more likely to be unfavourable (14% disagreeing vs. 3-6% in the other regions). Residents aged 18-34 years were the most likely to be neutral, while residents in the South West region were least likely. One in ten (10%) residents overall in the latest wave were unfavourable towards the airport.

Positive benefits

Over half (60%) of Western Sydney residents in May-June 2017 agreed that the positive benefits of the new airport will outweigh negative impacts, an increase from around half (49%) in the December 2016 wave. The increase in agreement occurred mainly among 18-34 year olds, and residents in the South West and West Central regions, resulting in all four regions being at a similar level of positive agreement. Most of the increase had been from a neutral/unsure position, and less than one in 10 (8%) in the latest wave disagreed with the position.

Concern about negative impact

Residents continued to be more divided on overall concern about the negative impact of building the airport. There was an increase in disagreement that the airport would have a negative impact on Western Sydney in May-June 2017 with around a third (34%) disagreeing that the airport would have this effect compared with one quarter (25%) in December 2016. Over a quarter (30%) continued to express concern, while around a third were indecisive (36% neutral or unsure). The decrease in concern was stronger among males, those aged 55 years and over, and residents in the

North West region. Concern was highest in the current wave in the South West region at over a third (38%).

Importance of 24/7 operation

There was also more division in relation to 24/7 operation of the new airport. A positive perception of the importance of 24/7 operation of the new airport remained stable in May-June 2017 (45% agreeing it was important vs. 45-51% in the earlier waves). However, with increased recent communications about the airport, there was a decrease in uncertainty and unformed opinion on the matter; as a result there was an increase in disagreement with the importance of 24/7 operation among residence, from around one-fifth (19%) in December 2016 to around a quarter (27%) in May-June 2017. Disagreement in May-June 2017 was greater among females, those aged 55 years and over, and in the South West and North West regions. Over a quarter (28%) were indecisive about the importance of 24-hour operations.

Perceived barriers and motivators

While the overall perception of benefits outweighing negative impacts (60% agreeing) has increased, there continue to be areas of more concern to residents. This indicates an opportunity to provide more education and evidence about benefits and how areas of concern are being addressed.

Concerns

Important areas of concern among Western Sydney residents encompassed traffic, noise and environmental impact. Around half or more residents expressed concern about a number of issues that were presented to them in the survey:

- increase in traffic during and after construction (55%)
- noise late at night and early in the morning if the airport operates 24 hours a day (55%)
- general noise pollution (51%)
- environmental impact once an airport is running (48%).

Concern tended to be higher among residents in the South West region, and lowest in the Inner West region.

Benefits

Key benefits of a new airport in Western Sydney that were acknowledged by two thirds or more of residents encompassed economic gains for the area and Sydney's global competitiveness:

- will bring jobs to the region (79%)
- will boost business and tourism in Western Sydney (72%)
- need for a new airport in Sydney to support the current one at Mascot (71%)
- necessary to maintain and grow Sydney's global competitiveness (68%)
- necessary to support Western Sydney's growing population and economy (67%).

Rail link

Western Sydney residents had strong interest in a rail link for the airport, with over four-fifths agreeing it should be available from day one (83%), linking to Western Sydney suburbs (84%) and

linking to the CBD (83%). There was some acknowledgement that this should be based on demand for services (29% agreeing). Given the strong interest, the rationale for decisions related to rail, such as the investment required to build a rail connection to the airport, should be addressed in communications.

Informing the community

The majority (59%) of Western Sydney residents continued to see it as very important to be informed about progress of the Western Sydney Airport, and less than one in ten (8%) considered it of low importance. Residents in the South West and North West regions expressed a marginally greater need to be informed.

Preferred unpaid channels for information about the airport's development, among those perceiving some importance, included a website dedicated to the airport (41%), local council (39%) and social media (34%). The positive response to the dedicated website is in contrast to the relatively low report of the website as a source of information.

1.3. Conclusions and Recommendations

The majority of residents continue to express the need to be informed about the progress of the airport, with the need tending to be higher in the South West and North West regions.

Table 1: Key findings and Recommendations

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 half considering they know at least 'quite a lot'. There is scope to increase knowledge progressively, particularly as further developments in construction etc. occur. Awareness was 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 new airport. Most information is reported to come from mainstream media including television, print newspapers and radio. 	<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 effectively reach the general population.
Explore current levels of community perceptions of the airport	
<ul style="list-style-type: none"> Improvements were observed in positive sentiment towards the new airport, including the level of favourability and benefits outweighing negative impacts, as well as some decline in concern about a negative impact. An increase in disagreement with the importance of the airport operating 24/7 was observed, and disagreement was higher in the South West and North West regions. 	<ul style="list-style-type: none"> Communications should include Information about the necessity of 24/7 operation, and how issues associated with noise are being addressed. Information about the realistic implementation of a rail link, including the investment required to build it, should be communicated to

<ul style="list-style-type: none"> Strong interest and expectation for a rail link were expressed, including operation from 'day one'. 	<p>residents, including the reasons for the path being taken.</p>
Identify the perceived barriers and motivators towards a positive perception of the airport	
<ul style="list-style-type: none"> Western Sydney is most divided on perception of benefits outweighing negative impacts. Key areas of concern were associated with increase in traffic, noise and environmental impact. Key benefits were economic gains for the area, including jobs and business/tourism and Sydney's global competitiveness. 	<ul style="list-style-type: none"> Communications should 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. Communications should also provide factual, evidence-based information about the expected benefits to the economy in the area, particularly based on results of similar infrastructure development.
Identify preferred (unpaid) channels for communication	
<ul style="list-style-type: none"> A dedicated website was well-received as a source of information, but reported use was very low. Other preferred channels included local councils and social media. 	<ul style="list-style-type: none"> A cost-effective 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 Communications and Stakeholder Engagement Section within the WSU in the Department of Infrastructure and Regional Development is responsible for implementing the Western Sydney Airport Project Communications and Stakeholder Engagement Strategy (the Strategy). To this end, the section is involved in the creation of a range of collateral and informative materials, such as the Environmental Impact Statement and Airport Plan documents, factsheets, summary documents, newsletters, and other resources to engage the community. The section also manages the 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 the Western Sydney Airport, WSU's communications tasks will 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 now that 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.

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 the 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 May 2017 survey was based on the five tracking surveys in the previous series conducted between November 2014 and December 2016. Changes to the method for the May-June 2017 wave were made due to the progress in the development of the Western Sydney Airport since the December 2016 wave, including the announcement of commitment of the Australian Government to deliver and invest in the Airport. This was to give a more robust coverage, and facilitate the evolution of the questionnaire to cover the current state of development. The new wave is seen as a benchmark for the ongoing survey series.

A telephone survey component was included in May-June 2017, in addition to the online component used in the earlier series to provide an additional level of robustness to the design in representative coverage of households. The survey fieldwork for both survey methods ran concurrently from the 23rd of May to the 6th of June 2017. The sample size was increased to 1,200, including 800 online and 400 by telephone, for the new benchmark. The sampling was also designed to allow for an independent comparison of the online component with the earlier surveys, along with measures from the full hybrid survey method. The final total number of surveys achieved was n=1,244, with n=844 online and n=400 telephone. The additional interviews achieved above the planned sample of n=1,200 were included in the final sample size reported throughout.

3.2. Target Audience

The primary target audience was people 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 2: Western Sydney Regions and Local Government Areas for May-June 2017 benchmark

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	The 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 the NSW Government's reorganisation of a number of the state's LGAs has resulted in mergers and re-defining of boundaries for several LGAs, the Australian Bureau of Statistics currently provides population data based on the earlier LGA boundaries and definitions.

The assignment of LGAs to Regions is shown in Table 2. The Regions are broadly similar to those used in the earlier survey series with the following changes:

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

3.3. Sampling and weighting

Quotas for the May-June 2017 survey were set by age, gender and location. The Regions were sampled largely in proportion to population, but with a minimum sample size of 200. The final survey sample was post-weighted to the population based on age, gender and location, as well as maintaining an incidence of 30% identified from culturally and linguistically diverse communities.

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 survey samples of this type.

For a survey sample of 1,200, and a survey result of 50%, the 95% confidence interval is $\pm 4.48\%$. Confidence intervals for a range of sample sizes are shown for reference in the Appendix to this report.

3.4. Questionnaire

The questionnaire for May-June 2017 was based on the one used in December 2016. The questionnaire 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 Western Sydney Airport development
- Attitudes towards surrounding infrastructure development
- Information seeking behaviour and preferred channels for communication
- Demographics.

3.5. Comparisons

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.¹

The tests are applied to all sub-groups or waves for each result in a particular data set, for example:

- between the four regions in Table 4 for each aspect
- between the seven survey waves in Table 5 for each rating category
- between males and females in Table 6 for each rating category
- between the two survey waves in Figure 3 for each demographic sub-group.

¹ 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.

3.6. Sample Profile

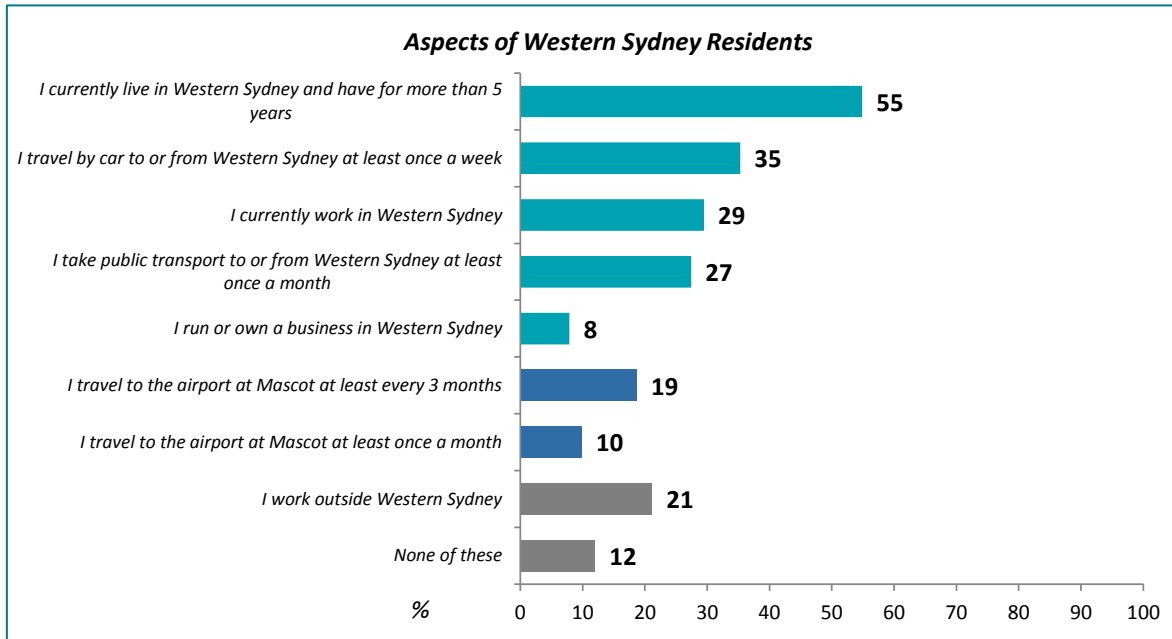
Table 3 outlines the demographic breakdown of the May-June 2017 benchmark sample.

Table 3: Sample profile (May-June 2017)

		TOTAL	
		%	n
Total	All	100	1244
Gender	Male	49	608
	Female	51	636
Age	18-34	24	302
	35-54	35	430
	55+	41	512
Location	South West	18	223
	Inner West	17	212
	North West	32	398
	West Central	33	411
Culturally and Linguistically Diverse Background	Yes	25	311
	No	74	915
	Prefer not to say/Unsure	1	18
Aboriginal and/or Torres Strait Islander	Yes	2	19
	No	93	1163
	Prefer not to say/Unsure	5	62
Employment	Work full-time (≥35 hours per week)	42	519
	Work part-time (<35 hours per week)	15	191
	Self-employed	5	66
	Retired	20	253
	In full time education	2	30
	Full time home / house duties	7	84
	Receiving government allowance	1	8
	Not currently employed	4	44
Education	Completed some high school	8	100
	High school graduate	19	232
	Technical college / TAFE	26	318
	Undergraduate degree	25	317
	Postgraduate degree	20	253
Household Income	<\$40k	18	226
	\$40,000 - \$64,999	15	189
	\$65,000 - \$79,999	10	124
	\$80,000 - \$99,999	10	123
	\$100,000 - \$119,999	9	106
	\$120k+	19	239
Marital Status	Registered married	60	748
	De facto/cohabiting relationship	9	112
	Not married	28	348
Parental Status	Children	33	412
	No Children	65	814

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: Western Sydney engagement and Sydney Airport usage (May-June 2017)



Q17. Which of the following applies to you? Please select all that apply.
Base: All (n=1,244)

Across locations, there was a tendency for people from the Inner West region to identify themselves with the Western Sydney less compared to other regions. They were also more likely to be frequent Sydney Airport users (Table 4).

Table 4: Aspects of Western Sydney Residents by Region (May-June 2017)

May-June 2017		Location			
Column %	TOTAL	South West	Inner West	North West	West Central
Rated 0-10	%	%	%	%	%
I currently live in Western Sydney and have for more than 5 years	55	66	18	66	54
I travel by car to or from Western Sydney at least once a week	35	40	13	41	36
I currently work in Western Sydney	29	32	11	40	26
I take public transport to or from Western Sydney at least once a month	27	28	15	31	29
I run or own a business in Western Sydney	8	8	3	9	8
I travel to the airport at Mascot at least every 3 months	19	14	24	19	18
I travel to the airport at Mascot at least once a month	10	8	17	9	9
I work outside Western Sydney	21	13	35	19	22
None of these	12	10	26	8	12
Sample size	1244	223	212	398	411

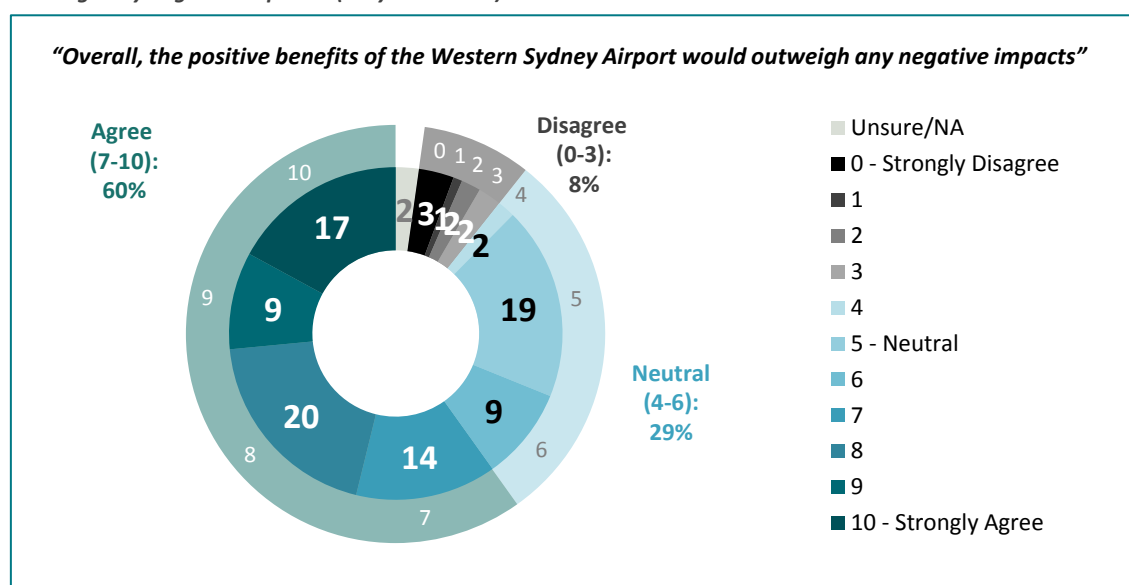
Q17. Which of the following applies to you? Please select all that apply.
Base: All (n=1,244)

4 Key Measures

4.1. Sentiment

When it came to measuring Western Sydney residents' sentiments towards the new airport development, six in ten (60%) people agreed that, overall, the positive benefits of the airport will outweigh any negative impacts. Just under three in ten (29%) were neutral, with less than one in ten (8%) disagreeing with the statement (Figure 2). There was a significant increase in the proportion of Western Sydney residents agreeing that the overall benefits will outweigh the negative impacts since the previous wave of research conducted in December 2016, which was prior to the announcement in the Federal Budget in May 2017 that the Australian Government will build and operate the airport. This increase was from just under half (49%) agreeing in December 2016 (Table 5).

Figure 2: Perception of "Overall, the positive benefits of the Western Sydney Airport at Badgerys Creek would outweigh any negative impacts" (May-June 2017)



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 the Western Sydney Airport at Badgerys Creek would outweigh any negative impacts"

Base: All (n=1,244)

Table 5: Perception of "Overall, the positive benefits of the Western Sydney Airport at Badgerys Creek would outweigh any negative impacts" (Nov 2014 to May-June 2017)

Overall, positive benefits of the Western Sydney Airport will outweigh any negative impacts							
Column %	Benchmark November 2014	June 2015	December 2015	April 2016	August 2016	December 2016	New Benchmark May-June 2017
Rated 0-10	%	%	%	%	%	%	%
0-3 Disagree	11	14	11	11	12	12	8
4-6 Neutral	30	30	30	32	32	31	29
7-10 Agree	49	49	52	49	48	49	60
Don't know	10	7	7	8	8	8	2
Sample size	501	513	502	499	505	503	1244

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 the Western Sydney Airport at Badgerys Creek would outweigh any negative impacts"

Base: All (n=1,244)

Across the demographics, agreement that the positive benefits will outweigh the negative impacts was stronger among males than females; around two-thirds (68%) of males agreed with the statement, compared to around half of females (52%). The older age group was more likely than younger age groups to disagree; over 1 in 10 (12%) of the 55 and older age group disagreed, compared to under 1 in 10 35-54 year olds (8%) and 18-34 year olds (6%) (Table 6).

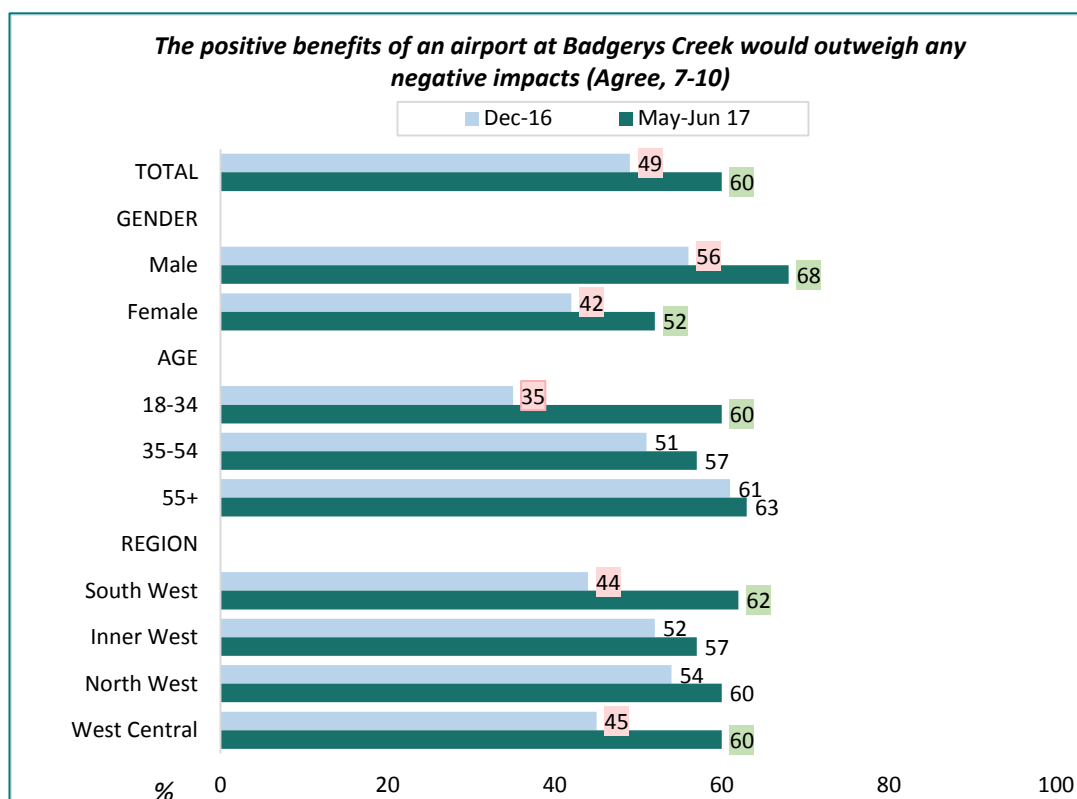
Table 6: Perception of "Overall, the positive benefits of the Western Sydney Airport at Badgerys Creek would outweigh any negative impacts" by demographics (May-June 2017)

Column %	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
Rated 0-10	%	%	%	%	%	%	%	%	%	%	%	%
Unsure/NA	2	2	3	2	3	1	2	4	1	3	2	2
0-3 Disagree	8	6	11	6	8	12	9	4	12	6	8	9
4-6 Neutral	29	24	34	32	32	24	27	36	27	31	32	29
7-10 Agree	60	68	52	60	57	63	62	57	60	60	58	61
Sample size	1244	608	636	302	430	512	223	212	398	411	311	915

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 the Western Sydney Airport at Badgerys Creek would outweigh any negative impacts"

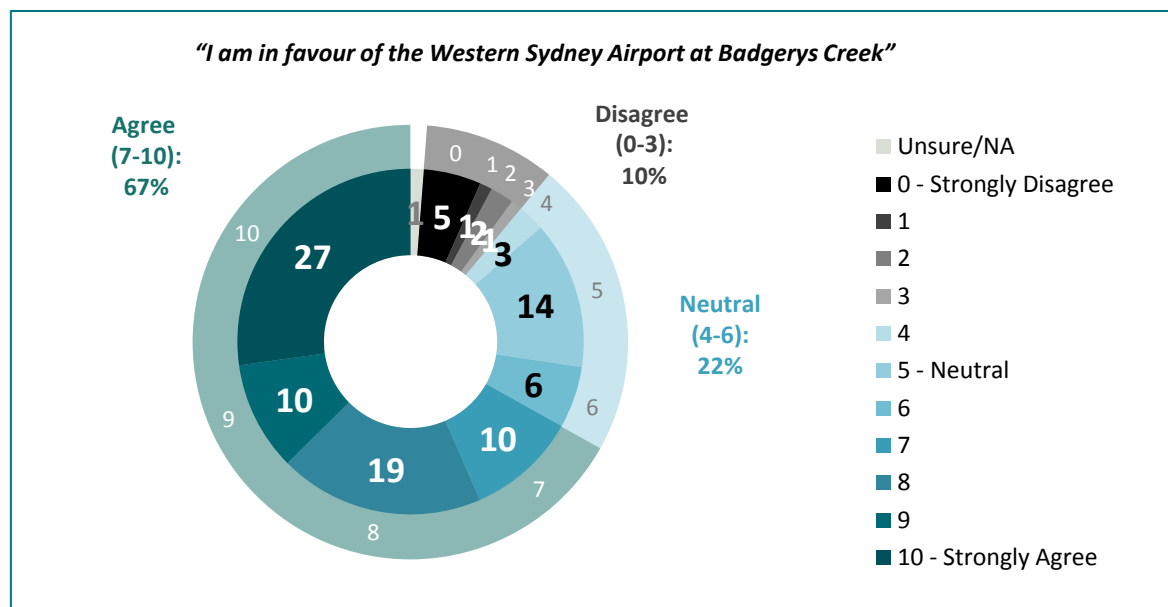
Comparing the demographics from the December 2016 wave and the new May-June 2017 benchmark, agreement that the positive benefits will outweigh any negative impacts increased for both males and females, as well as 18-34 year olds. It also increased among those in the South West region, where the development site will be located, as well as the West Central region (Figure 3).

Figure 3: Perception of overall benefits of Western Sydney Airport vs. negative impacts, comparing May-June 2017 with December 2016



Additionally, people were asked if they were in favour of the Western Sydney Airport at Badgerys Creek. Two thirds (67%) of people were in favour of the Western Sydney Airport at Badgerys Creek (Figure 4). This is an increase since December 2016, when just over half (56%) agreed (Table 7). The increase in agreement was largely driven by a decline in the proportion who were Unsure; 8% selected 'Don't know' in December 2016 compared to 1% selecting 'Don't know' in May-June 2017 (Table 7).

Figure 4: Favourability of the Western Sydney Airport at Badgerys Creek (May-June 2017)



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=1,244)

Table 7: Favourability of the Western Sydney Airport at Badgerys Creek by waves

Sentiment towards the airport							
Column %	Benchmark November 2014	June 2015	December 2015	April 2016	August 2016	December 2016	New Benchmark May-June 2017
Rated 0-10	%	%	%	%	%	%	%
0-3 Disagree	12	12	8	12	12	11	10
4-6 Neutral	28	25	25	25	26	25	22
7-10 Agree	54	56	61	57	56	56	67
Don't know	6	7	6	6	6	8	1
Sample size	501	513	502	499	505	503	1244

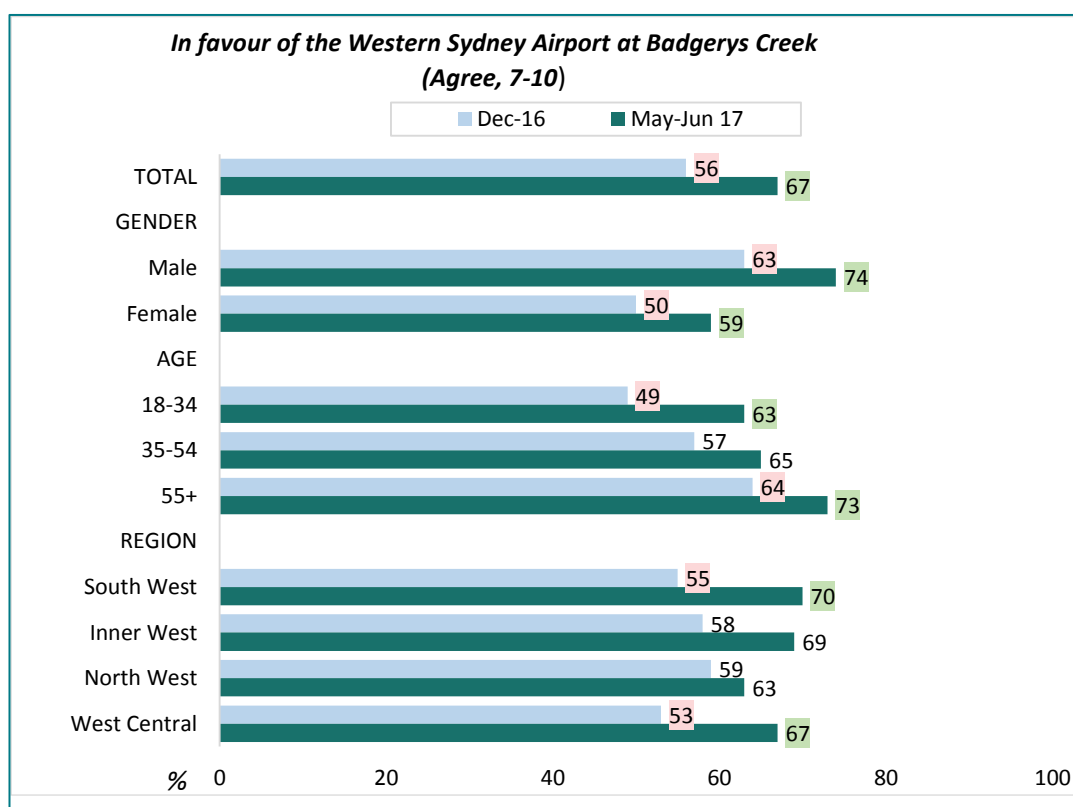
Across the demographic breakdowns, males felt more favourable towards the airport than females; close to three quarters (74%) of males agreed that they were in favour of the airport compared to close to six in ten (59%) females. The older age group was also more favourable with close to three quarters (73%) in agreement, compared to under two thirds of each of the younger age groups (65% of 35-54 year olds, 63% of 18-34 year olds) (Table 8).

Table 8: Favourability of the Western Sydney Airport at Badgerys Creek, by demographics (May-June 2017)

Column %	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
<i>Rated 0-10</i>	%	%	%	%	%	%	%	%	%	%	%	%
0-3 Disagree	10	6	14	8	11	10	14	3	14	6	7	11
4-6 Neutral	22	19	25	28	22	15	13	26	22	25	24	21
7-10 Agree	67	74	59	63	65	73	70	69	63	67	68	67
Unsure/NA	1	1	2	1	2	1	2	2	1	1	1	1
Sample size	1244	608	636	302	430	512	223	212	398	411	311	915

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"

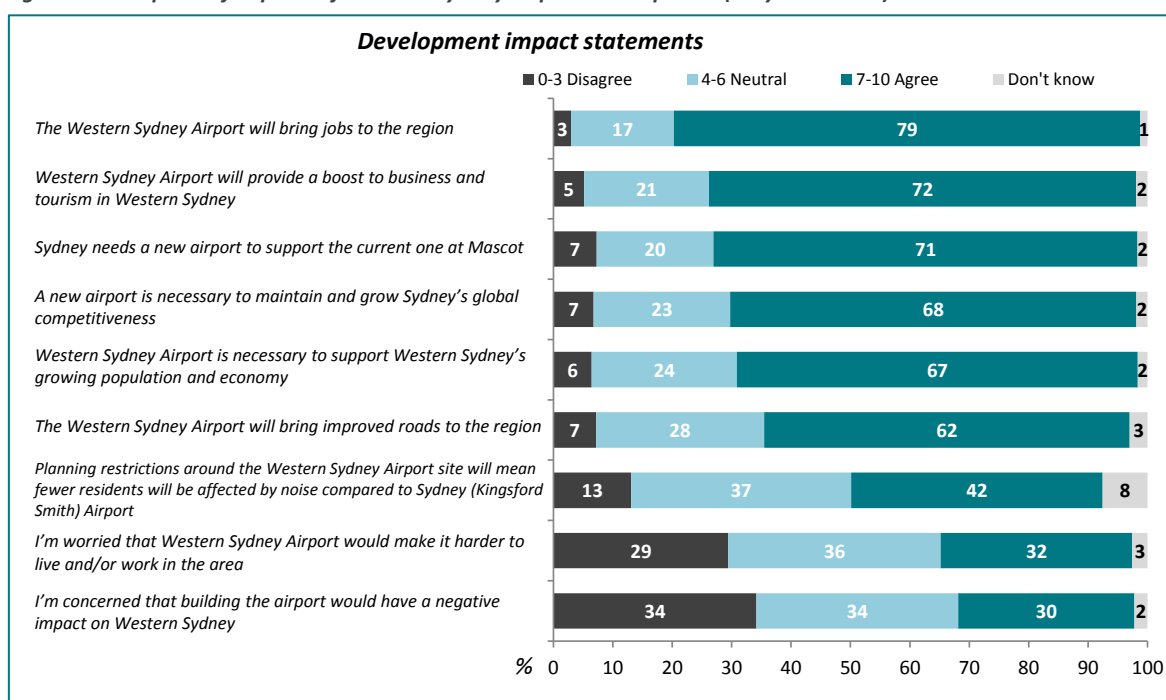
Comparing the demographic breakdowns from the December 2016 wave with the current May-June 2017 benchmark results, the increase in favourability over time was evident for both males and females, as well as 18-34 year olds and those aged 55 years and older and those in the South West and West Central regions (Figure 5).

Figure 5: Favourability of the Western Sydney Airport at Badgerys Creek, comparing May-June 2017 with December 2016

4.2. Perceived Benefits and Concerns

The survey asked people if they agreed or disagreed with a series of statements gauging their perceptions of potential benefits and concerns. Over three quarters (79%) agreed that the airport will bring jobs to the region. Just under three quarters agreed that the airport 'will provide a boost to business and tourism in Western Sydney' (72% of people agreed) and that 'Sydney needs a new airport to support the current one at Mascot' (71% agreed). Just under one third agreed that they were 'worried that Western Sydney Airport would make it harder to live and/or work in the area' (32%) and that they were 'concerned that building the airport would have a negative impact on Western Sydney' (30%) (Figure 6).

Figure 6: Perception of impacts of Western Sydney Airport development (May-June 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 (n=1,244)

Tracking the perceived concern that building the airport will have a negative impact on Western Sydney since the previous wave, there has been a decline from over one third (36%) of Western Sydney residents agreeing that this was a concern in December 2016 to under one third agreeing that this was a concern in May-June 2017 (Table 9). Additionally, there has been an increase of those disagreeing with the statement, from 25% in December 2016 to 34% in May-June 2017.

Table 9: Concern that building the airport would have a negative impact on Western Sydney, by waves (November 2014 to May-June 2017)

Concerned about the negative impact building an airport would have on Western Sydney							
Column %	Benchmark November 2014	June 2015	December 2015	April 2016	August 2016	December 2016	Benchmark May-June 2017
Rated 0-10	%	%	%	%	%	%	%
0-3 Disagree	25	22	21	24	23	25	34
4-6 Neutral	37	38	41	35	38	32	34
7-10 Agree	33	36	34	37	35	36	30
Don't know	5	4	4	4	4	6	2
Sample size	501	513	502	499	505	503	1244

Looking at the demographic breakdown of this metric, the youngest age group (18-34 year olds) was most likely to be concerned about the negative impact of building the airport on Western Sydney; over one third (36%) of 18-34 year olds agreed that this was a concern, compared to approximately three in ten (29%) 35-54 year olds and approximately one in five (22%) of those aged 55 years and older (Table 10). Those in the South West region were more likely than those in other regions to agree that this is a concern; over one third (38%) in the South West region agreed that it was a concern (Table 10).

Table 10: Concern that building the airport would have a negative impact on Western Sydney, by demographics (May-June 2017)

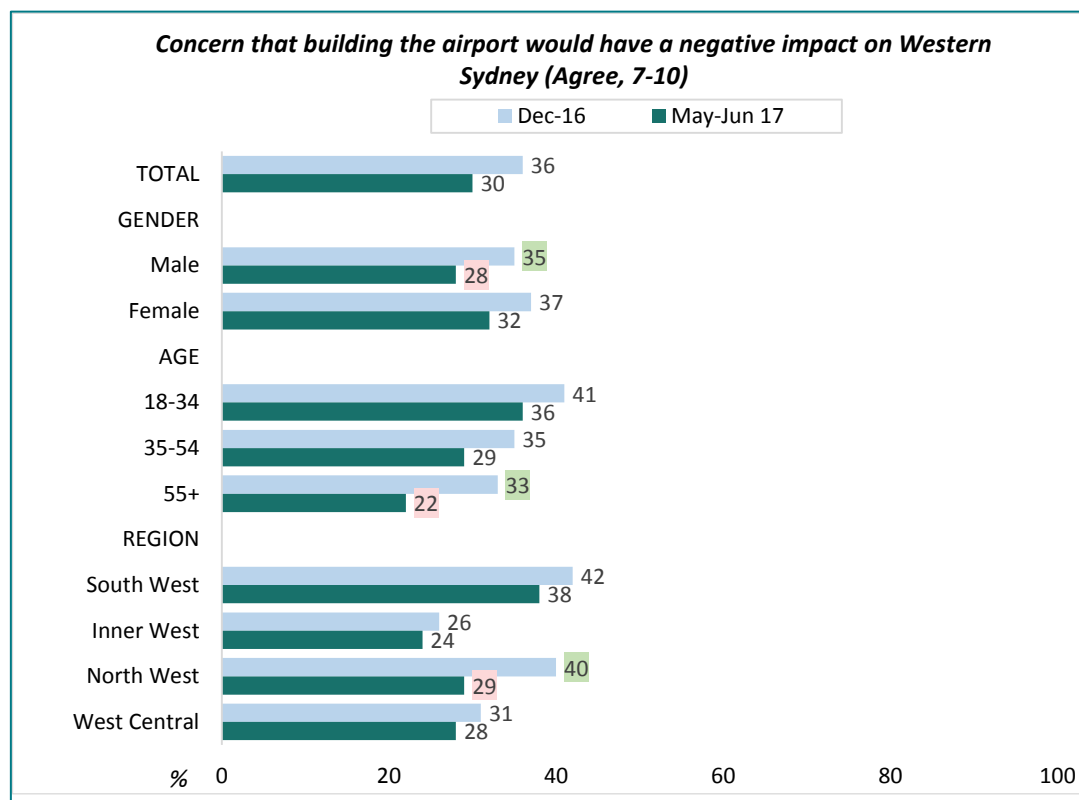
Column %	TOTAL	Gender		Age			Location				Culturally and Linguistically Diverse	
		Male	Female	18-34	35-54	55+	South West	Inner West	North West	West Central	Yes	No
<i>Rated 0-10</i>	%	%	%	%	%	%	%	%	%	%	%	%
0-3 Disagree	34	40	29	27	32	45	32	39	34	34	33	35
4-6 Neutral	34	31	37	35	36	31	29	33	35	36	37	33
7-10 Agree	30	28	32	36	29	22	38	24	29	28	28	30
Unsure/NA	2	1	3	2	3	3	1	4	2	2	1	2
Sample size	1244	608	636	302	430	512	223	212	398	411	311	915

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=1,244)

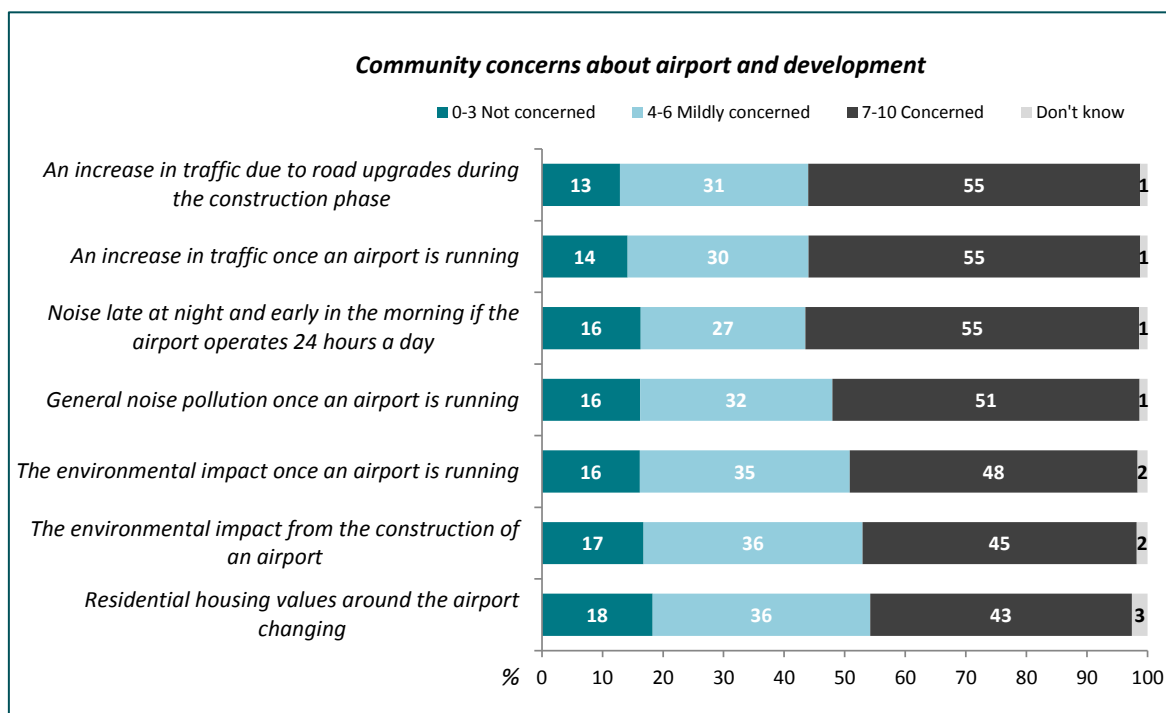
Comparing the previous wave's demographic results with the current, the declining concern that building the airport will have a negative impact on Western Sydney is evident across all regions and age groups but appears to be the most statistically relevant among males, those aged 55 years and older and those in the North West region (Figure 7).

Figure 7: Concern that building the airport would have a negative impact on Western Sydney, comparing May-June 2017 with December 2016



Western Sydney residents were provided a series of statements and asked to indicate their level of concern over each. Over half of people were concerned about the potential for 'an increase in traffic due to road upgrades during the construction phase' (55%), 'an increase in traffic once an airport is running' (55%) and 'noise late at night and early in the morning if the airport operates 24 hours a day' (55%) (Figure 8).

Figure 8: Potential community concerns of the Western Sydney Airport development



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 (n=1,244)

When comparing the locations' concerns with these statements, those in the Inner West region were less likely than those in other regions to be concerned about the various impacts of development of the airport, including increased traffic, noise and changing residential house values (Table 11).

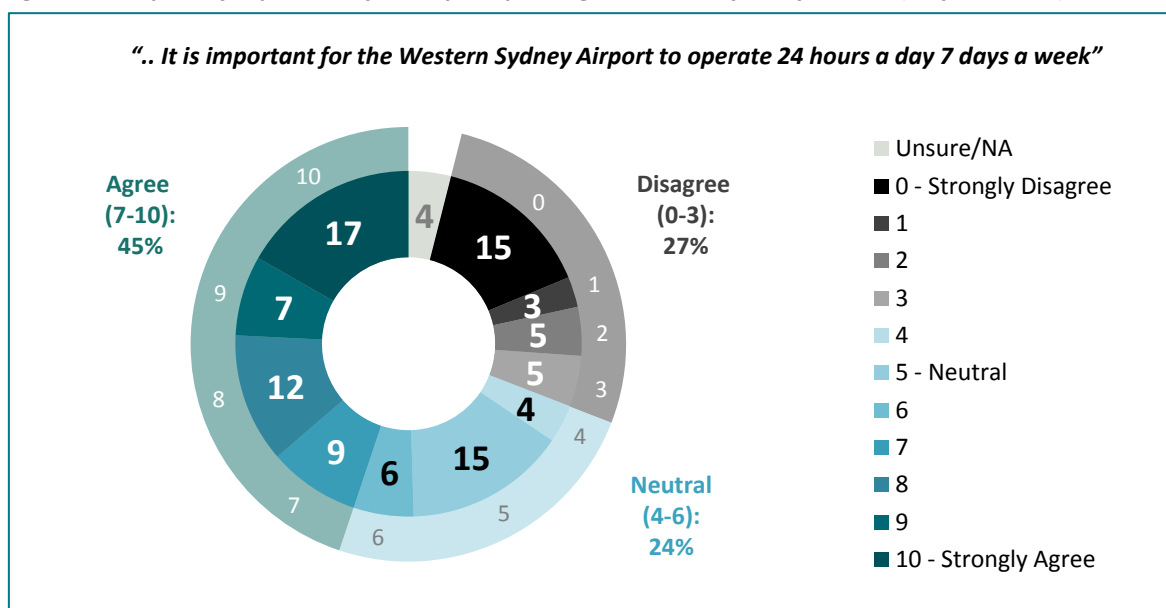
Table 11: Potential community concerns of the Western Sydney Airport development by Location (May-June 2017)

Response	TOTAL	Location			
		South West	Inner West	North West	West Central
Concerned 7-10	%	%	%	%	%
An increase in traffic due to road upgrades during the construction phase	55	61	46	54	56
An increase in traffic once an airport is running	55	60	43	56	56
Noise late at night and early in the morning if the airport operates 24 hours a day	55	60	46	57	55
General noise pollution once an airport is running	51	56	38	54	50
The environmental impact once an airport is running	48	53	46	48	45
The environmental impact from the construction of an airport	45	45	45	46	45
Residential housing values around the airport changing	43	47	32	45	44
Sample size	1244	223	212	398	411

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

Western Sydney residents were asked how important they felt it was for the airport to operate 24 hours a day, 7 days a week. People were somewhat divided over the importance of the 24 hour operation of the airport. Although close to half (45%) agreed that it is important, approximately one quarter (24%) were neutral and the remaining quarter (27%) disagreed that it is important (Figure 9). Of the 27% who disagreed, more than half (15%) were in strong disagreement (0 on scale) (Figure 9).

Figure 9: Perception of importance of the airport operating 24 hours a day, 7 days a week (May-June 2017)



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 the Western Sydney Airport to operate 24 hours a day, 7 days a week, rather than be restricted by a curfew"

Base: All (n=1,244)

Compared to the previous waves, the proportion of people who disagreed that it is important that the airport operates 24 hours a day has increased since December 2016, driven by a shift from both 'Neutral' and 'Don't know' to 'Disagree' (Table 12).

Table 12: Perception of importance of the airport operating 24 hours a day, 7 days a week, by waves

Importance of airport operating 24/7							
Column %	Benchmark November 2014	June 2015	December 2015	April 2016	August 2016	December 2016	New Benchmark May-June 2017
Rated 0-10	%	%	%	%	%	%	%
0-3 Disagree	NA	17	17	20	19	19	27
4-6 Neutral		29	24	27	26	24	24
7-10 Agree		46	51	45	47	48	45
Don't know		8	8	8	8	9	4
Sample size		513	502	499	505	503	1244

In the May-June 2017 benchmark, the groups that agreed most strongly that 24 hour operation will be important were males, with over half (56%) agreeing that it is important compared to only one third (35%) of females, along with 18-34 year olds, half of whom (50%) agreed that it is important (Table 13). Culturally and Linguistically Diverse groups were more likely to agree that it is important that the airport operates 24 hours a day; over half (56%) of CALD people interviewed agreed, compared to four in ten (40%) non-CALD people interviewed (Table 13).

Table 13: Perception of importance of the airport operating 24 hours a day, 7 days a week, by demographics (May-June 2017)

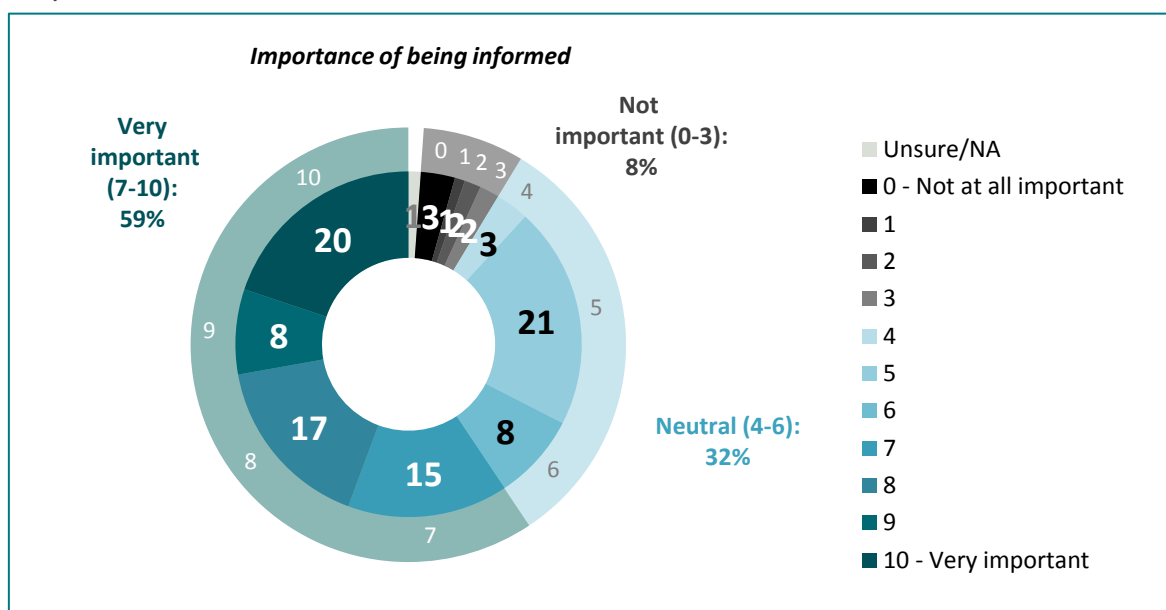
Column %	TOTAL	Gender		Age			Location				Culturally and Linguistically Diverse	
		Male	Female	18-34	35-54	55+	South West	Inner West	North West	West Central	Yes	No
<i>Rated 0-10</i>	%	%	%	%	%	%	%	%	%	%	%	%
0-3 disagree	27	20	33	18	28	37	33	22	33	21	18	31
4-6 neutral	24	21	27	28	24	20	15	26	23	29	23	25
7-10 agree	45	56	35	50	44	40	47	48	41	46	56	40
Unsure/NA	4	3	5	4	5	3	5	4	3	4	4	4
<i>Sample size</i>	1244	608	636	302	430	512	223	212	398	411	311	915

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 the Western Sydney Airport to operate 24 hours a day, 7 days a week, rather than be restricted by a curfew"

4.4. Communications

When it came to the importance of communications and updates on the development, nearly six in ten (59%) felt that it is important that they personally be kept informed about the progress of the airport. Less than one in ten (8%) thought that it is not important. These proportions have remained largely stable across the previous waves of research, with no significant change in the May-June 2017 benchmark (Table 14).

Figure 10: Perception of importance of being informed about the Western Sydney Airport's development (May-June 2017)



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=1,244)

Table 14: Importance of being informed, by waves (Nov 2014 to May-June 2017)

Sentiment towards the airport							
Column %	Benchmark November 2014	June 2015	December 2015	April 2016	August 2016	December 2016	Benchmark May-June 2017
Rated 0-10	%	%	%	%	%	%	%
0-3 Not important	9	7	7	6	8	7	8
4-6 Neutral/Unsure	33	29	31	34	33	31	33
7-10 Very important	58	64	62	60	59	62	59
Sample size	501	513	502	499	505	503	1244

When broken down to demographic segments, people aged 55 years and older were more likely to feel that it is not important that they are kept informed about progress of the airport than the younger age groups (Table 15). People from non-CALD backgrounds were also more likely to feel that it is not important that they are kept informed than those from CALD backgrounds (Table 15).

Table 15: Importance of being informed, by demographics (May-June 2017)

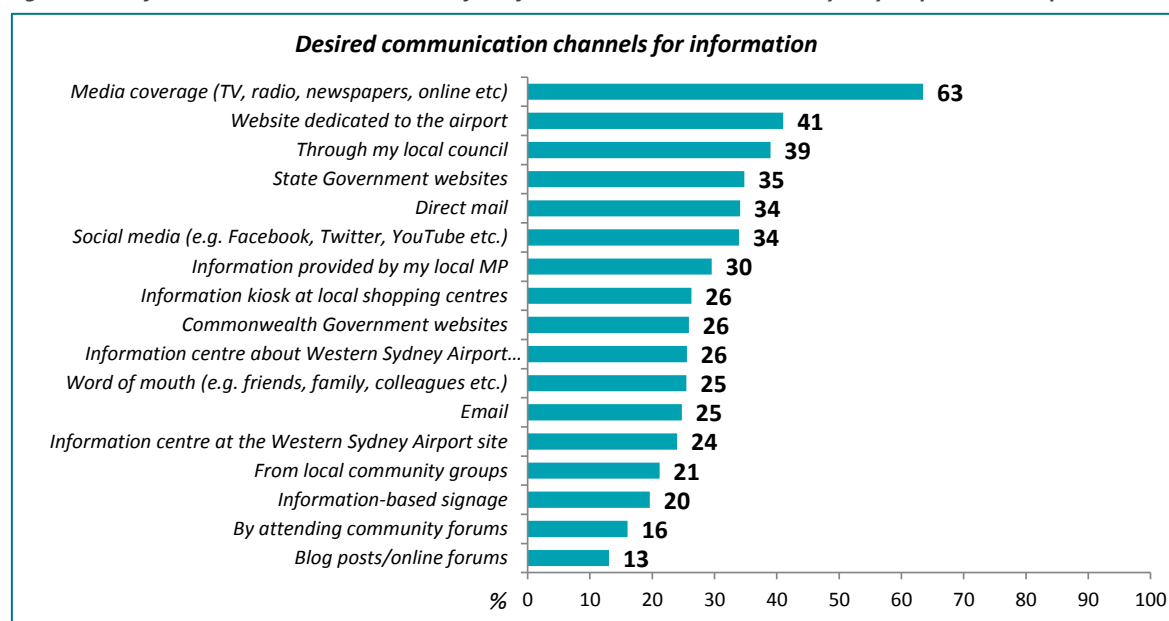
Importance	TOTAL	Gender		Age			Location				Culturally and Linguistically Diverse	
		Male	Female	18-34	35-54	55+	South West	Inner West	North West	West Central	Yes	No
Rated 0-10	%	%	%	%	%	%	%	%	%	%	%	%
0-3 Not important	8	7	8	7	5	11	8	10	6	8	3	10
4-6 Neutral	32	31	33	35	34	25	25	38	31	34	33	31
7-10 Very important	59	61	58	57	59	63	66	51	63	56	62	58
Unsure	1	1	1	1	1	1	1	1	1	2	2	0
Sample size	1244	608	636	302	430	512	223	212	398	411	311	915

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=1,244)

Those that indicated a rating of 6-10 in importance of being personally informed of the progress of the airport, were then asked where they would want to get their information from. Media coverage was the preferred communication channel for information about the airport for approximately six in ten (63%) people (Figure 11). Approximately four in ten would want to get information from a website dedicated to the airport (41%) or through their local council (39%). Relatively few were interested in getting information from blog posts/online forums (13%) or attending community forums (16%) (Figure 11).

Figure 11: Preferred communication channels for information about the Western Sydney Airport's development



Q15. Where would you want to get information about the 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=852)

Across the four locations, those in the South West region were more receptive to getting information about the airport from their local council than those in other areas, with close to half (48%) preferring this communication method (Table 16). Those in the North West region were the most receptive to communication methods including direct mail (40%) and information provided by their local MP (36%) (Table 16).

Table 16: Preferred communications channels, by location (May-June 2017)

Response	All	Location			
		South West	Inner West	North West	West Central
Channel	%	%	%	%	%
Media coverage (TV, radio, newspapers, online etc)	63	61	58	65	65
Website dedicated to the airport	41	38	44	44	39
Through my local council	39	48	22	42	37
State Government websites	35	37	39	35	32
Direct mail	34	36	13	40	35
Social media (e.g. Facebook, Twitter, YouTube etc.)	34	31	31	35	36
Information provided by my local MP	30	28	18	36	28
Information kiosk at local shopping centres	26	27	22	29	25
Commonwealth Government websites	26	25	28	30	22
Information centre about Western Sydney Airport in Western Sydney	26	25	18	28	27
Word of mouth (e.g. friends, family, colleagues etc.)	25	32	15	21	31
Email	25	24	21	26	25
Information centre at the Western Sydney Airport site	24	30	27	24	20
From local community groups	21	21	11	25	22
Information-based signage	20	23	13	19	21
By attending community forums	16	18	10	18	15
Blog posts/online forums	13	14	12	13	13
Sample size	852	164	133	296	259

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

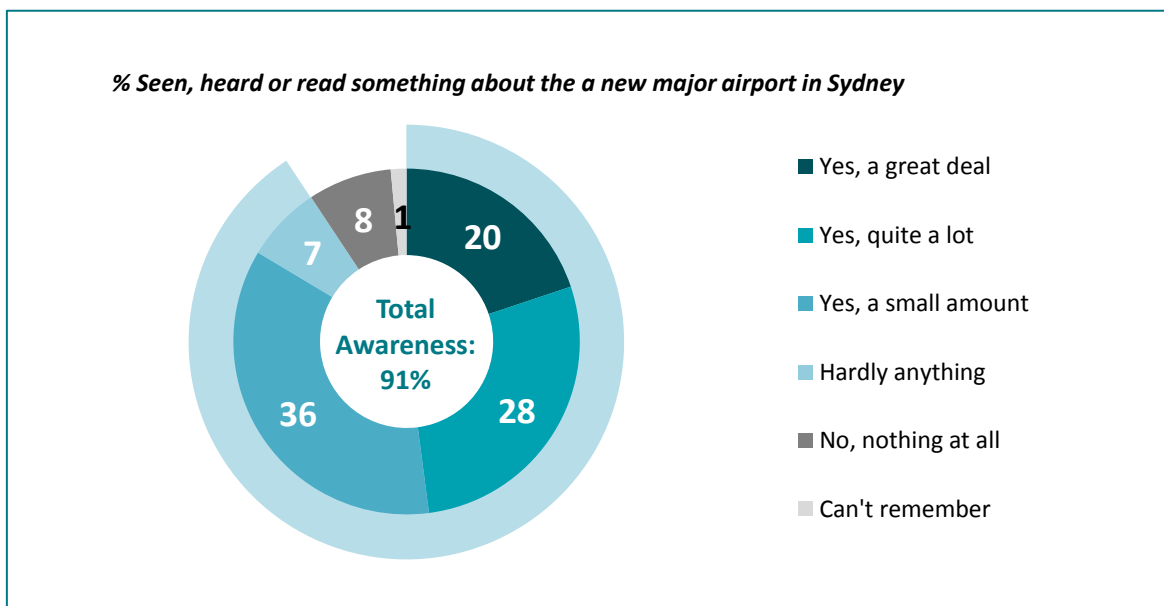
Base: Those who provided a rating of 6-10 rating of importance in being informed of the airport's development (n=852)

5 Other Measures

5.1. Awareness of the Western Sydney Airport

Across Western Sydney in May-June 2017, 91% of people indicated that they have heard something about the development of a new major airport in Sydney, including one fifth of Western Sydney residents who felt they knew a great deal (Figure 12). Less than one in ten indicated that they have heard nothing or could not recall (8% nothing at all, 1% can't remember).

Figure 12: Awareness of a new major airport in Sydney (May-June 2017)



Q1. Before today, have you seen, heard or read anything about the development of a new major airport in Sydney?
Base: All (n=1,244)

Across the demographic breakdowns, males tended to have a higher rate of awareness overall (93%) compared with females (88%) (Table 17). There was a positive correlation with age and overall awareness whereby as age increased so did awareness. People residing in the Inner West region were more likely to not have heard anything (14% 'nothing at all') about a new major airport in Sydney than other regions. People living in the South West region of Western Sydney, closest in proximity to the Badgerys Creek development site, had the highest total awareness amongst the regions (96%).

Table 17: Awareness of a new major airport in Sydney, by demographics (May-June 2017)

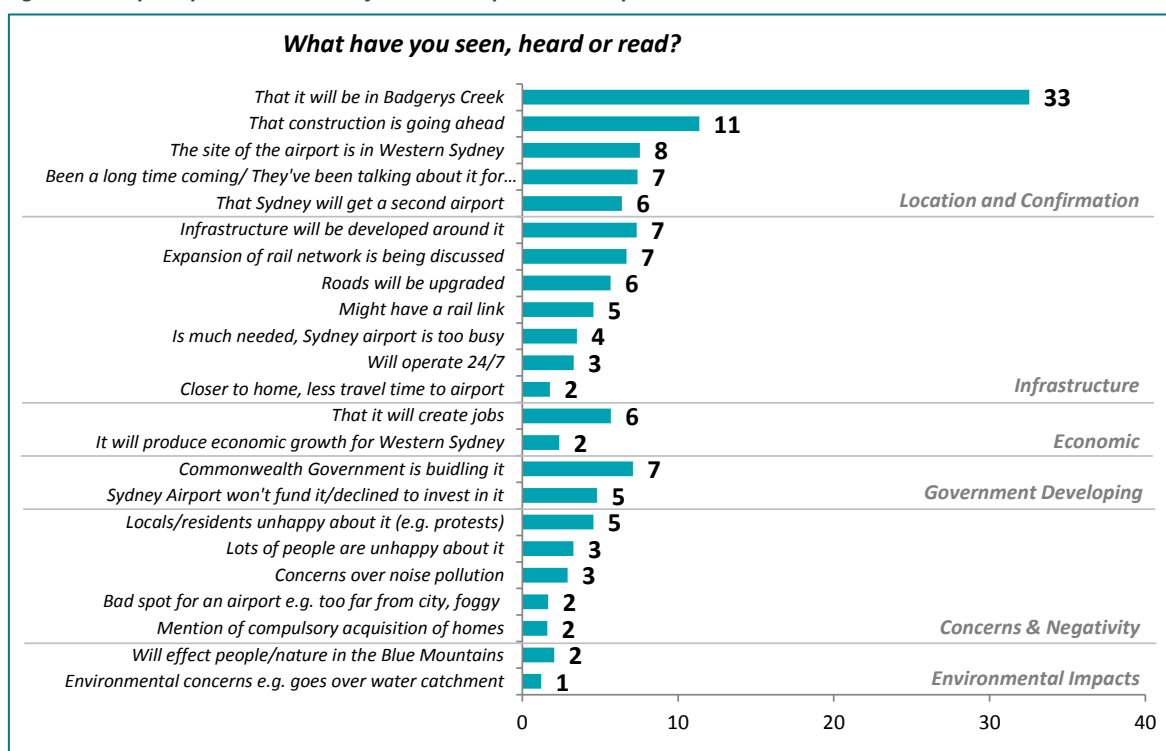
Response	TOTAL	Gender		Age			Location				Culturally and Linguistically Diverse	
		Male	Female	18-34	35-54	55+	South West	Inner West	North West	West Central	Yes	No
Rated 0-10	%	%	%	%	%	%	%	%	%	%	%	%
Total Aware	91	93	88	87	92	94	96	86	93	87	87	92
Great deal	20	23	17	18	21	21	24	15	23	17	22	19
Quite a lot	28	30	26	24	27	35	27	28	30	26	21	31
Small amount	36	35	36	37	37	32	39	34	34	36	35	36
Hardly anything	7	5	9	9	7	6	6	9	6	7	9	6
Nothing at all	8	5	10	10	8	6	3	14	6	10	11	6
Unsure/NA	1	2	1	3	1	1	1	0	1	3	2	1

Sample size	1244	608	636	302	430	512	223	212	398	411	311	915
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Q1. Before today, have you seen, heard or read anything about the development of a new major airport in Sydney?

People who were aware of a new major airport in Sydney were then asked an open-ended text question asking what they had seen, heard or read about the development. One third of people indicated that they were aware that the airport site would be Badgerys Creek, awareness of other details surrounding the development was reasonably low by comparison (Figure 13). Nearly one quarter (24%) mentioned some detail about infrastructure and development, including the potential expansion of a rail network to the airport (7%) and that roads would be upgraded in the surrounding area (6%). Over one in ten (12%) people mentioned a top-of-mind concern or area of negativity around the development, such as local residents being unhappy about it (5%) or concerns over noise pollution (3%).

Figure 13: Unprompted awareness of the new airport's developments

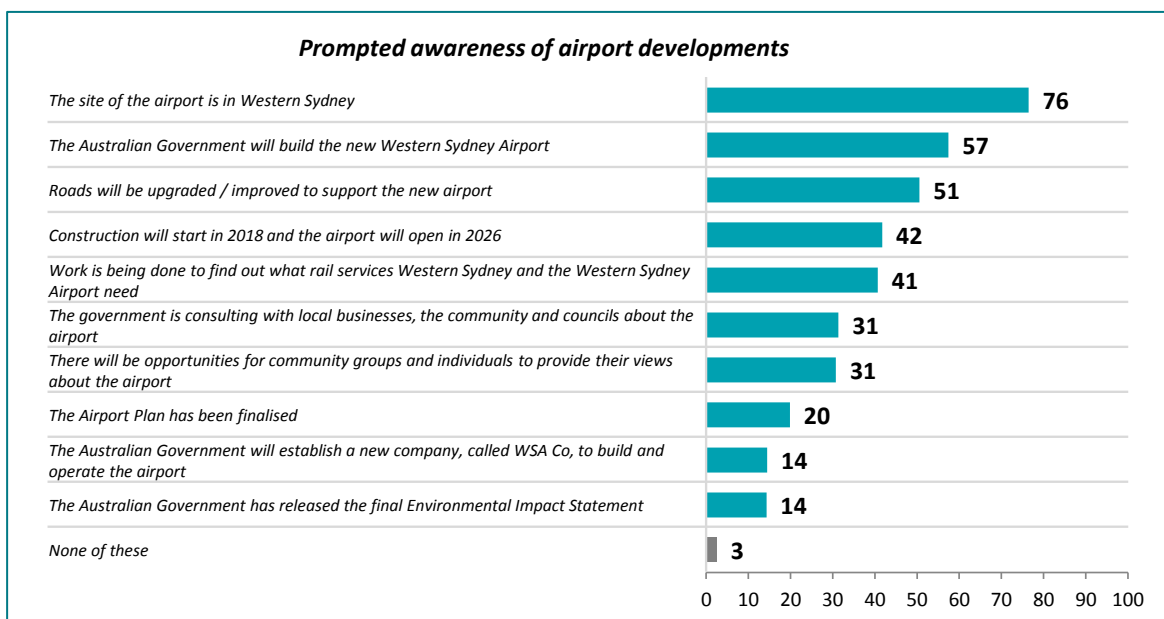


Q2. What have you seen, heard or read about the development of a new major airport in Sydney?

Base: Those who have seen, heard or read anything about the development of a new major airport in Sydney (n=1,139)

When asked about particular aspects of the new major airport in Sydney, over three-quarters (76%) indicated that they knew the site of the new airport would be in Western Sydney (Figure 14). Over half were aware that the Australian Government would be building the new airport (57%) as well as that roads would be upgraded to support the new airport (51%).

People were less aware that the Environmental Impact Statement had been released (14%). Similarly there was a lack of awareness that the Australian Government will establish a new company, called WSA Co to build and operate the airport (14%), perhaps unsurprising given how recent this development was at the time of the research (Figure 14).

Figure 14: Prompted awareness of the new major airport's developments (May-June 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=1,139)

Prompted awareness of developments surrounding the airport were reasonably uniform across the Western Sydney regions. People in the North West were more aware that the airport would be in Western Sydney (84%) than the other regions (Table 18). People in the West Central region were less likely to be aware of the construction and opening timings of the airport (35%) than other regions (42-46%).

Table 18: Awareness of a new major airport in Sydney, by Location (May-June 2017)

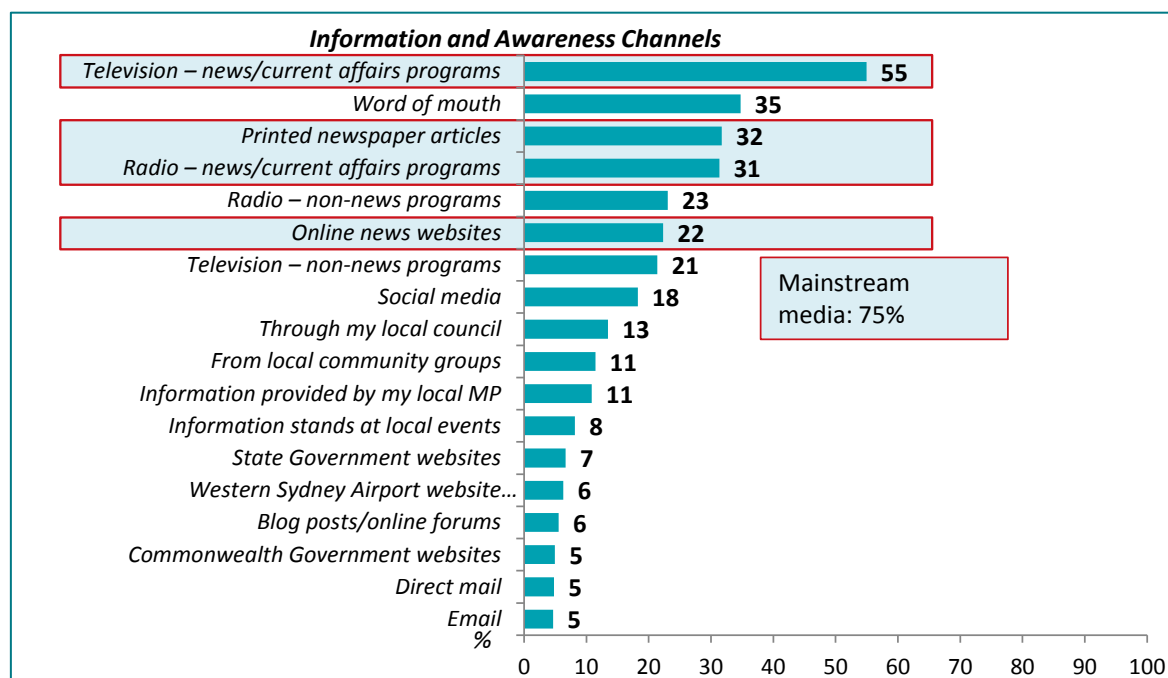
Response	TOTAL	Location			
		South West	Inner West	North West	West Central
<i>Heard of developments</i>	%	%	%	%	%
The site of the airport is in Western Sydney	76	76	71	83	73
The Australian Government will build the new Western Sydney Airport	57	64	59	57	54
Roads will be upgraded / improved to support the new airport	51	51	48	52	50
Construction will start in 2018 and the airport will open in 2026	42	45	42	46	35
Work is being done to find out what rail services Western Sydney and the Western Sydney Airport need	41	41	39	42	39
The government is consulting with local businesses, the community and councils about the airport	31	32	32	34	29
There will be opportunities for community groups and individuals to provide their views about the airport	31	31	29	35	27
The Airport Plan, a document that outlines and authorises the development and operation of a new single-runway airport in Sydney, has been finalised	20	22	20	20	18
The Australian Government will establish a new company, called WSA Co, to build and operate the airport	14	11	16	19	11
The Australian Government has released the final Environmental Impact Statement	14	16	13	15	13
None of these	3	2	5	2	2
Sample size	1139	215	189	375	360

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=1,139)

5.2. Sources of Information

People 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. Over half (55%) indicated that they heard about it through a news or current affairs program on television. Over one third of people (35%) heard about it through word of mouth from a friend or family member (Figure 15). Overall, three-quarters (75%) of people had seen, heard or read about it through a form of mainstream media. Nearly one tenth (9%) of people indicated that they had accessed the Western Sydney Airport website or a Commonwealth Government website for information.

Figure 15: Channels of awareness of the development of a new major airport in Sydney (May-June 2017)

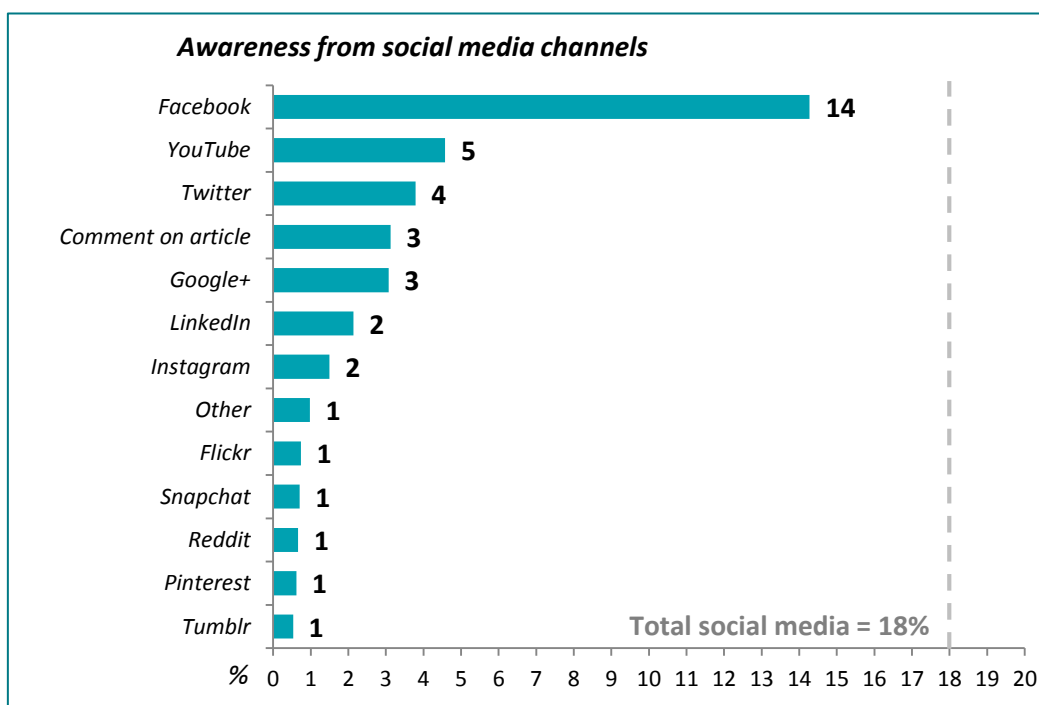


Q4. Where have you seen, heard or read anything about the development of a new major airport in Sydney?

Base: Those who have seen, heard or read anything about the development of a new major airport in Sydney (n=1,139)

Of those that had heard, seen or read something about a new major airport in Western Sydney, 18% had done so via Social Media. Facebook was the most prominent Social Media channel, with 14% of people who were aware having seen something on this channel, 5% had seen something on YouTube followed by 4% on Twitter (Figure 16).

Figure 16: Social media channel sources of posts about the new Western Sydney Airport (May-June 2017)



Q16. You indicated earlier that you have seen posts on social media about the new Western Sydney Airport at Badgerys Creek. Please select all of the below social networks/channels on which you have seen posts about the new airport in the last three months.
Base: Those who indicated that they had heard, seen or read something about the airport on social media (n=186)

Across the demographics, people from the older age bracket 55+ were more likely to have heard something from more traditional channels, most notably through printed news articles (52%), radio news (48%) and non-news radio (34%) programs. Younger people in the 18-34 age bracket were more likely to have heard something through social media (25%), which was their second highest channel for information (Table 19).

The North West region received more information through local channels, including their local council (21%), their local MP (18%), community groups (18%) and information stands at local events (38%), while residents of the Inner West and West Central regions accessed information from these sources at significantly lower rates (less than 10% for any local channel).

People from a culturally and linguistically diverse background were more likely to access information from online news websites (29% compared to 20%) and less likely to access information through other conventional media (TV, print or radio news).

Table 19: Channels of awareness of the development of a new major airport by demographics (May-June 2017)

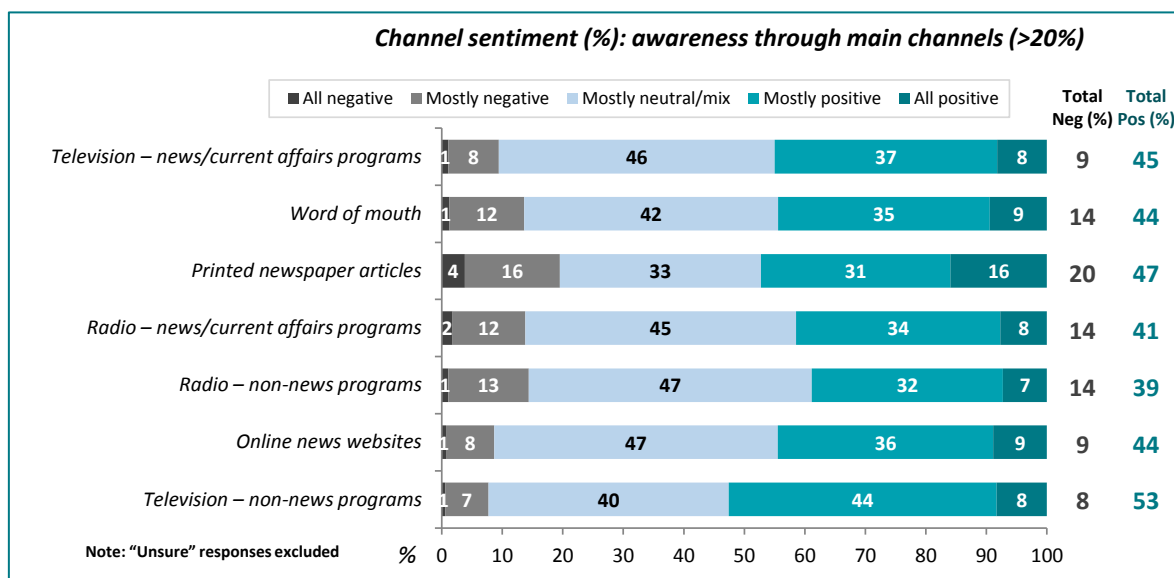
Column %	TOTAL	Gender		Age			Location				Culturally and Linguistically Diverse	
		Male	Female	18-34	35-54	55+	South West	Inner West	North West	West Central	Yes	No
Rated 0-10	%	%	%	%	%	%	%	%	%	%	%	%
Television – news/current affairs programs	55	57	53	37	54	76	58	57	55	52	46	59
Word of mouth	35	35	34	34	33	38	37	36	36	32	35	35
Printed newspaper articles	32	34	29	16	29	52	33	32	38	25	23	36
Radio – news/current affairs programs	31	36	27	21	27	48	36	29	33	28	21	36
Radio – non-news programs	23	25	21	16	21	34	22	26	21	25	21	24
Online news websites	22	29	16	25	24	18	17	32	23	21	29	20
Television – non-news programs	21	23	19	16	18	31	23	19	19	24	21	21
Social media	18	18	19	25	17	13	20	19	18	17	18	18
Through my local council	13	13	14	9	13	18	18	4	21	8	12	14
From local community groups	11	11	11	9	10	16	14	6	19	5	11	12
Information provided by local MP	11	12	10	5	9	19	12	5	18	6	6	13
Information stands at local events	8	9	8	8	8	8	7	6	13	5	8	8
State Government websites	7	8	6	7	7	5	5	7	9	6	8	6
Western Sydney Airport website	6	7	6	8	5	6	6	5	7	6	7	6
Blog posts/online forums	6	7	4	6	8	3	3	7	5	7	7	5
Commonwealth Government websites	5	6	3	4	6	5	4	4	4	7	6	5
Direct mail	5	5	4	3	3	8	5	3	7	3	4	5
Email	5	6	4	4	5	5	4	3	5	5	6	4
Sample size	1139	570	569	258	395	486	215	189	375	360	269	857

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=1,139)

People who had heard, seen or read something about the new major airport in Sydney were asked how positive the coverage of the information sources had generally been over the last three months. Across the major sources of information, which 20% or more people had accessed information from, the content had been largely positive, with 39-53% of people indicating positive content and only 8-20% negative content (Figure 17). Printed newspapers were the most polarised information source, having the highest rate of negative content (16% mostly negative, 4% all negative), however also having the highest rate of positive content (31% mostly positive, 16% all positive).

Figure 17: Sentiment of content of key communication channels (higher than 20% exposure) (May-June 2017)

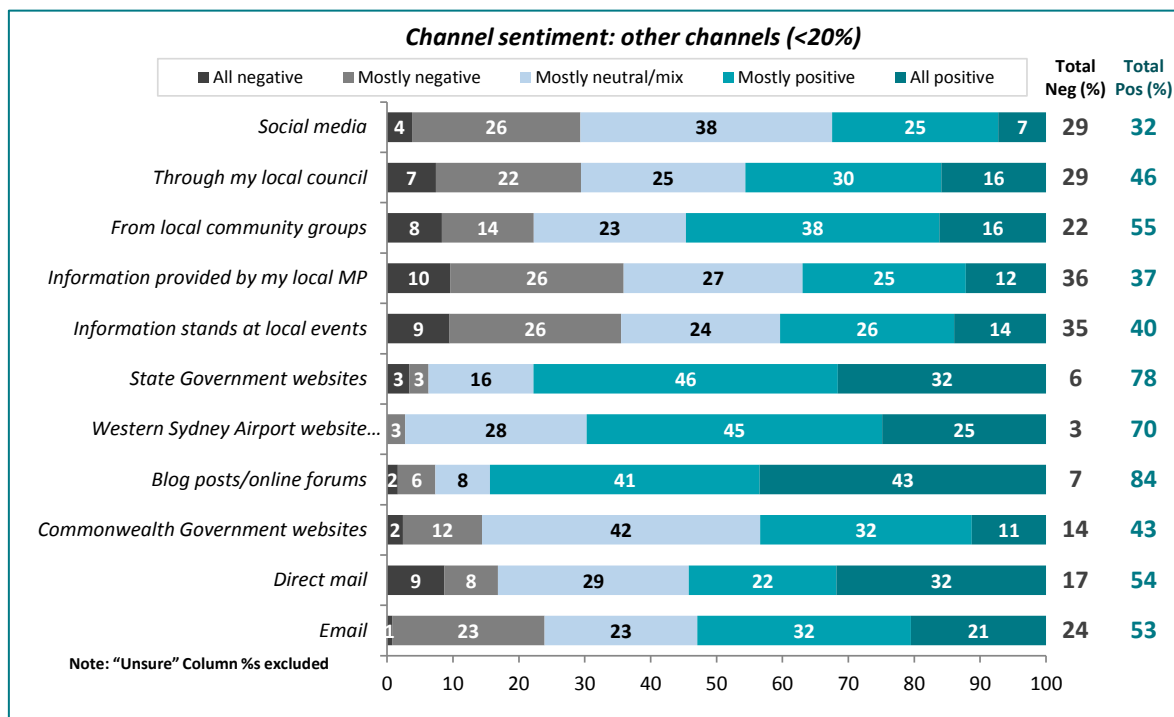


Q5. Thinking about the last three months, please select overall how positive or negative the content in the source below has been regarding the development of a new major airport in Sydney.

Base: Those who had seen, heard or read anything via the respective channel (n=255 - 671)

Figure 18 outlines the sentiment ratings of the content for sources of information that were accessed by less than 20% of people aware of the airport. Information obtained from local sources, such as community groups, local MPs and local events tended to be a mix of negative, neutral and positive in sentiment. Social media was also quite polarised with 29% indicating the content was negative and 32% positive.

Figure 18: Sentiment of content of other communication channels (lower than 20% exposure) (May-June 2017)



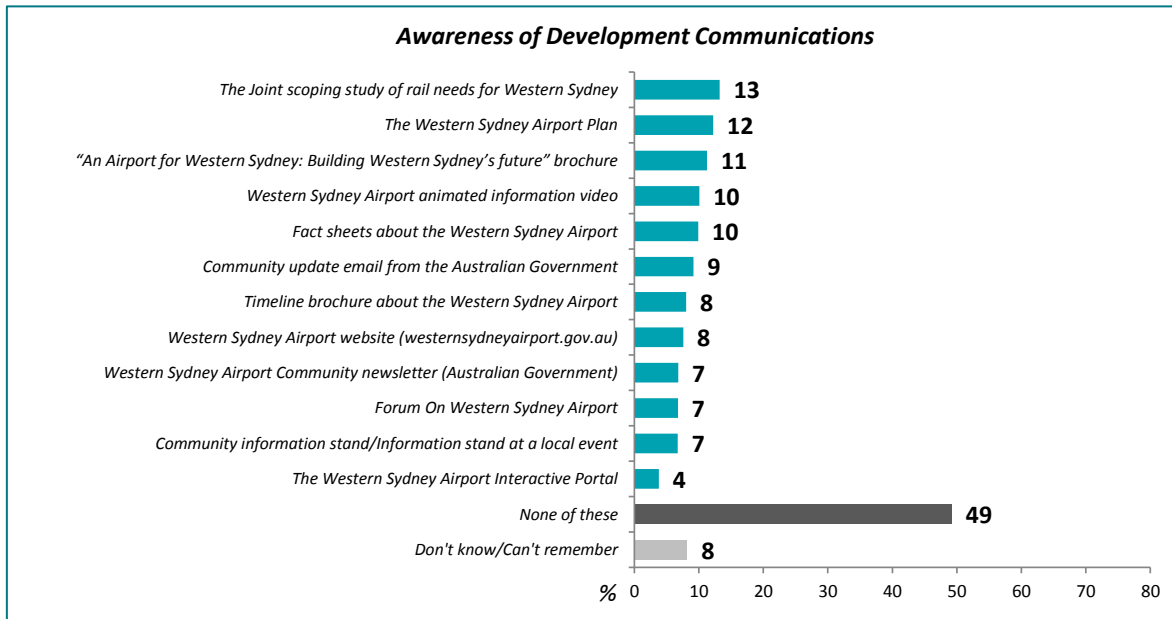
Q5. Thinking about the last three months, please select overall how positive or negative the content in the source below has been regarding the development of a new major airport in Sydney.

Base: Those who had seen, heard or read anything via the respective channel (n=49-236)

People aware of a new Sydney airport were asked if they had encountered any of the Australian Government initiatives and communication releases. The online survey included images of the

communications, whilst the telephone survey had extended descriptions to assist with recall. Awareness of the initiatives and communications ranged from 4-13% (Figure 19).

Figure 19: Awareness of Western Sydney Unit development communications (May-June 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=1,139)

Awareness of initiatives and communications was lower in the Inner West region, which had a higher proportion of people (60%) indicating they had seen none of the initiatives or communications (Table 19). People from the North West region were more likely to have seen fact sheets about the Western Sydney Airport (13%) compared to the other regions (4-11%).

Table 20: Channels of awareness of the development of a new major airport by demographics (May-June 2017)

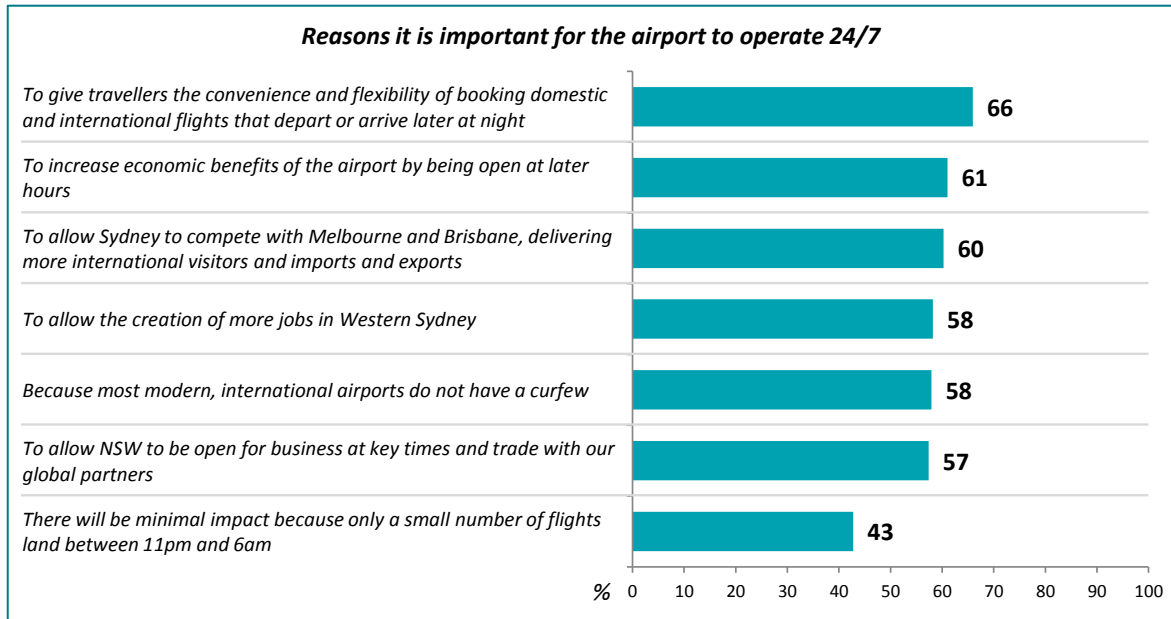
Column %	TOTAL	Location			
		South West	Inner West	North West	West Central
Heard of developments	%	%	%	%	%
The Joint scoping study of rail needs for Western Sydney	13	11	9	14	15
The Western Sydney Airport Plan	12	13	11	14	11
"An Airport for Western Sydney: Building Western Sydney's future" brochure	11	13	8	12	11
Western Sydney Airport animated information video	10	10	9	11	10
Fact sheets about the Western Sydney Airport	10	11	4	13	8
Community update email from the Australian Government	9	8	9	11	8
Timeline brochure about the Western Sydney Airport	8	10	6	9	7
Western Sydney Airport website (westernsydneyairport.gov.au)	8	8	7	9	7
Western Sydney Airport Community newsletter (Australian Government)	7	10	3	8	5
Forum On Western Sydney Airport	7	7	5	7	7
Community information stand/Information stand at a local event	7	6	2	8	8
The Western Sydney Airport Interactive Portal	4	5	2	4	4
None of these	49	48	60	46	49
Don't know/Can't remember	8	9	6	6	11
Sample size	1139	215	189	375	360

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?

5.3. Reasons for operating 24 Hours a Day, 7 Days a Week

People who indicated an importance rating of 6 or higher as to why it was important that the Western Sydney Airport operated 24 hours a day, 7 days a week, rather than under a curfew, were asked to select reasons why. Two-thirds (66%) indicated that it was important to give travellers the convenience and flexibility of booking flights that arrive or depart at a later time, making it the most selected reason why (Figure 20). Other reasons included increased economic benefits (61%), allowing Sydney to compete with Melbourne and Brisbane (60%) and to allow the creation of more jobs in Western Sydney (58%).

Figure 20: Perceptions of reasons operation 24 hours a day, 7 days a week (May-June 2017)

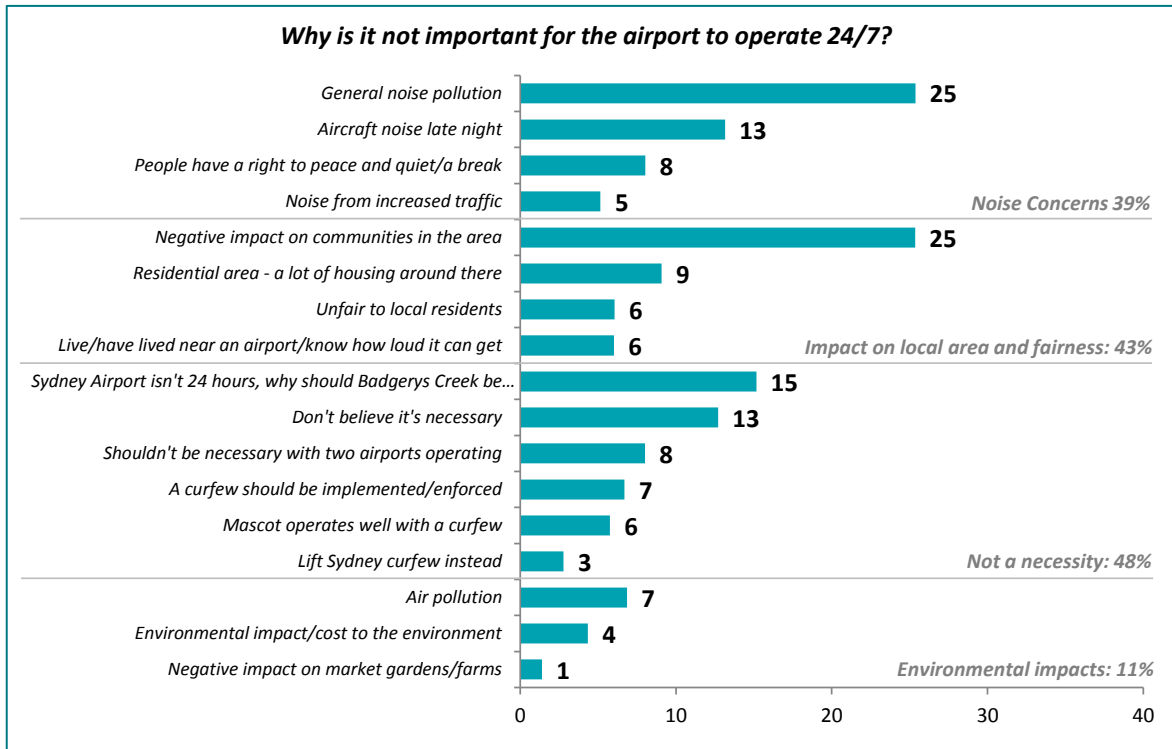


Q11. Why do you believe it is important for the Western Sydney Airport to operate 24 hours a day, 7 days a week? Please select all the reasons below that apply.

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 (n=613)

People who indicated an importance rating of 4 or lower as to why it was important that the Western Sydney Airport operated 24 hours a day, 7 days a week, rather than under a curfew, were asked to provide reasons why. One quarter (25%) stated that it would create too much noise generally; 13% stated aircraft noise late at night specifically; 39% mentioned noise impacts overall (Figure 21). Nearly one half (48%) stated reasons surrounding the necessity for the Western Sydney Airport to operate without a curfew. One quarter (25%) felt it would have a negative impact on people in the area, 43% in total mentioned that it would be bad or unfair for the people in the area. Over one tenth (11%) mentioned impacts on ecosystems and the environment.

Figure 21: Perceptions of reasons operation 24 hours a day, 7 days a week (May-June 2017)



Q11B. Why do you believe that it is not important for the 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 provided a rating of 0-4 in disagreeing that it is important for Western Sydney Airport to not be restricted by a curfew (n=398)

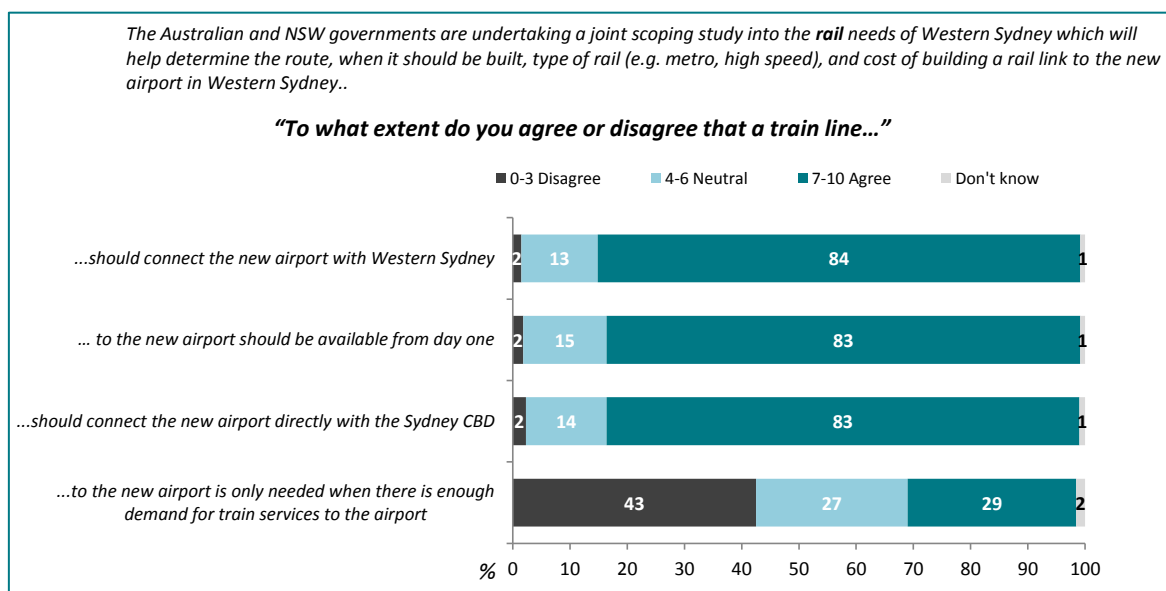
5.4. Rail link

People 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, then asked if they agree or disagree with four randomised statements. There were very high levels of agreement that the rail link:

- *Should connect the new airport with Western Sydney (84% 7-10 Agree)*
- *To the new airport should be available from day one (83% 7-10 Agree)*
- *Should connect the new airport directly with the Sydney CBD (83% 7-10 Agree).*

Each of these statements had very low proportions (2%) of people disagreeing with them. There was more disagreement 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* (43% disagree, 29% agree). This statement, being less definitive and specific in nature, was met with a more balanced set of responses.

Figure 22: Attitudes towards operation of rail link to the Western Sydney Airport (May-June 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 (n=1,244)

6 Conclusions and Recommendations

6.1. Conclusions

Awareness of Western Sydney Airport

The large majority (91%) of Western Sydney residents had seen or heard something about the development of a new major airport, with around half (48%) saying they had heard quite a lot or a great deal about it. A key topic mentioned spontaneously as being seen or heard about the airport was confirmation of construction, particularly the location at Badgerys Creek. When prompted, the majority of those aware of the airport had heard that the site is in Western Sydney (76%), the Australian Government is building the airport (57%), and roads will be improved to support the new airport (51%).

Key measures of community sentiment

There were some increases in May-June 2017 in positive sentiment towards the airport on key measures of *favourability*, and *positive benefits*, with the majority of the residents of Western Sydney holding a positive position on each (67% and 60% agreeing respectively), and up to one in ten holding a negative position. Positive sentiment had increased particularly in the South West and West Central regions, and was now at a similar level across the regions.

There was also some decrease in May-June 2017 in *concern about a negative impact* of building the airport (down to 30% agreeing), remaining highest in the South West region at over a third (38%) agreeing.

In contrast to the increase in positive sentiment on the above measures, overall disagreement with the importance of *24/7 operation* increased in May-June 2017 to around a quarter (27%). Disagreement was higher in the South West and North West regions (33% disagreeing vs. 21-22% in the other regions). The community continued to be more divided overall on this issue, including a quarter (28%) being indecisive on its importance.

Perceived barriers and motivators

Concerns

Important areas of concern among Western Sydney residents encompassed traffic, noise and environmental impact, and concern tended to be higher among residents in the South West region, and lowest in the Inner West region. Around half or more residents overall expressed concern about several issues presented in the survey:

- increase in traffic during and after construction (55%)
- noise late at night and early in the morning if the airport operates 24 hours a day (55%)
- general noise pollution (51%)
- environmental impact once an airport is running (48%).

Benefits

Key benefits of a new airport in Western Sydney that were acknowledged by two thirds or more of residents encompassed economic gains for the area and Sydney's global competitiveness:

- will bring jobs to the region (79%)
- will boost business and tourism in Western Sydney (72%)
- need for a new airport in Sydney to support the current one at Mascot (71%)
- necessary to maintain and grow Sydney's global competitiveness (68%)
- necessary to support Western Sydney's growing population and economy (67%).

Informing the community

The majority (59%) of Western Sydney residents continued to see it as very important to be informed about progress of the Western Sydney Airport, and less than one in ten (8%) considered it of low importance. Residents in the South West and North West regions expressed a greater need to be informed.

Preferred unpaid channels for information about the airport's development, among those perceiving some importance, included a website dedicated to the airport (41%), local council (39%) and social media (34%). The positive response to the dedicated website is in contrast to the relatively low report of the website as a source of information.

6.2. Recommendations

The majority of residents continue to express the need to be informed about the progress of the airport, with the need tending to be higher in the South West and North West regions.

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 half considering they know at least 'quite a lot'. There is scope to increase knowledge progressively, particularly as further developments in construction etc. occur. • Awareness was 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 new airport. • Most information is reported to come from mainstream media including television, print newspapers and radio. 	<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 effectively reach the general population.
Explore current levels of community perceptions of the airport	
<ul style="list-style-type: none"> • Improvements were observed in positive sentiment towards the new airport, including the level of favourability and benefits outweighing negative impacts, as well as some decline in concern about a negative impact. • An increase in disagreement with the importance of the airport operating 24/7 was 	<ul style="list-style-type: none"> • Communications should include Information about the necessity of 24/7 operation, and how issues associated with noise are being addressed. • Information about the realistic implementation of a rail link, including the investment required to

<p>observed, and disagreement was higher in the South West and North West regions.</p> <ul style="list-style-type: none"> Strong interest and expectation for a rail link were expressed, including operation from 'day one'. 	<p>build it, 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	
<ul style="list-style-type: none"> Western Sydney is most divided on perception of benefits outweighing negative impacts. Key areas of concern were associated with increase in traffic, noise and environmental impact. Key benefits were economic gains for the area, including jobs and business/tourism and Sydney's global competitiveness. 	<ul style="list-style-type: none"> Communications should 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. Communications should also provide information about the expected benefits to the economy in the area, particularly based on results of similar infrastructure development.
Identify preferred (unpaid) channels for communication	
<ul style="list-style-type: none"> A dedicated website was well-received as a source of information, but reported use was very low. Other preferred channels included local councils and social media. 	<ul style="list-style-type: none"> A cost-effective 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%. The calculation includes a continuity correction.

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