



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



Department of Infrastructure, Regional Development and Cities

***Western Sydney Airport Evaluation Research
May–June 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 awareness levels 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 was conducted in September-October 2017, with a sample of 615 residents
- a third wave was conducted in February-March 2018, with a sample of 613 residents
- a fourth wave was conducted in May-June 2018 with 903 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 May-June 2018 survey, and tracking of measures.

1.4. Key Findings

Awareness of Western Sydney Airport

In May-June 2018, a large majority (91%) of Western Sydney residents had seen or heard at least something about the development of a new major airport, including half (50%) 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%) which followed the announcement in the Federal Budget.

Key channels in September-October 2017 that were reported as sources of information about the airport were mainstream media, including television news/current affairs programs (54%), printed newspaper articles (30%), and radio news/current affairs programs (24%); and 'word of mouth' (28%). Social media was mentioned by around one-fifth (18%), primarily Facebook.

Key measures of community sentiment

In May-June 2018 over half of surveyed residents of Western Sydney expressed positive sentiment towards the airport on key measures of *favourability* (61% agreeing) and *positive benefits outweighing any negative impact* (58% agreeing); with around one in ten holding a negative position on each. One-third (35%) expressed *concern about a negative impact* of building the airport, while around two-fifths (42%) agreed with the *importance of 24/7 operation*.

There has been small declines in positive sentiment compared with peak results seen during 2017.

Overall concern

In May-June 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, with around one-third (35%) agreeing and less than one-third disagreeing (28%).

Importance of 24/7 operation

Agreement with the *importance of 24/7 operation* in May-June 2018 (42%) was similar to February-March 2018 (40%) maintaining a lower result from the average of the earlier two surveys conducted in May-June 2017 and September-October 2017 (46%), and below the average of the earlier surveys conducted from 2015 (47%). One-quarter (25%) of residents disagreed with the importance of 24/7 operation, and one-third (33%) were neutral or unsure of its importance.

Perceived barriers and motivators

While the majority of residents in May-June 2018 continued to have a positive overall perception that benefits of the airport outweigh any negative impacts, there continue to be areas of concern to residents. This situation indicates an opportunity to provide more education and evidence about the benefits and information on how areas of concern are being addressed.

Concerns

Important areas of concern among Western Sydney residents continued to focus on traffic, noise and environmental impacts. Similar to the earlier surveys, over half of residents surveyed in May-June 2018 expressed concern about:

- increase in traffic both during construction (58%) and once running (55%)
- general noise pollution once running (57%)
- noise late at night and early in the morning if the airport operates 24 hours a day (56%).

These levels of concern have remained similar through the surveys in 2107 and 2018.

Benefits

Three-fifths or more of residents surveyed in May-June 2018 viewed economic gains for the area and Sydney's global competitiveness as key benefits of the airport. Key benefits in May-June 2018 were that the airport:

- will bring jobs to the region (72%)
- is needed to support the current airport at Mascot (68%)
- is necessary to maintain and grow Sydney's global competitiveness (67%)
- will boost business and tourism in Western Sydney (66%).

Ratings of the benefits were strongly related to favourability towards the airport.

Rail link

In May-June 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' (80%). There was some acknowledgement that the rail link should be based on demand for services (32% agreeing), although two-fifths disagreed, indicating a large minority more strongly considering 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

Among residents in the current survey perceiving some importance of being kept informed, the top four preferred unpaid channels in May-June 2018 for information about the airport's development, included media coverage (nominated by 58%), a website dedicated to the airport (41%), local council (34%) and state government websites (32%).

While there is a moderately strong interest for a dedicated website, the incidence of residents reporting having used the existing website as a source of information was low (7%).

1.5. Conclusions and Recommendations

The core recommendations from the earlier waves continue to be relevant following the May-June 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 (91%) of residents were aware of the airport, and the proportion reporting knowing at least 'quite a lot' has returned to the level seen in the May-June 2017 benchmark, at around half of residents. There is scope to increase knowledge progressively and, importantly, to maintain knowledge particularly as further developments occur. Overall, reported knowledge continues to be lower among female residents, residents aged 18-34 years and 35-54 years, and residents in Inner West region. Awareness continues to be strongest around the site being in Western Sydney, that the Australian Government is building the airport, and that roads will be improved to support the airport. Unprompted mentions of infrastructure have also started to increase. The most commonly reported source for information continues to be television news/current affairs. Other traditional mainstream media—print newspapers and radio news/current affairs—along with 'word of mouth' continue to be effective. Social media is close to the most reported channel by residents aged 18-34 years. 	<ul style="list-style-type: none"> Utilising media releases and other promotional activity which can be reported particularly in television news/current affairs, but also radio news/current affairs and newspaper articles, provides the potential to reach the general population more effectively, and improve awareness and knowledge of the airport development. Such activity can generate, and build on 'word of mouth' communication. Communication could be enhanced to reach residents aged under 55 years, to improve overall knowledge about the airport. This could include use of social media, which continues to be an important channel for residents aged 18-34 years. Awareness is strongest around the airport's location, and there is opportunity to improve knowledge about both the upgrades/improvements in Western Sydney and economic growth. Awareness can generate the expectation of hearing more information, particularly when changes occur progressively. There is an opportunity to build stronger positive sentiment and understanding of benefits in the community, addressing the community broadly through media releases for traditional mainstream media, and on social media.
Explore current levels of community perceptions of the airport	
<ul style="list-style-type: none"> The decline in positive sentiment towards the new airport seen earlier in 2018 has remained, including the level of favourability and perception of benefits outweighing negative impacts. In this survey, residents of South West region were more likely to be unfavourable towards the airport. Agreement with the importance of the airport operating 24/7 is also lower, and remains below earlier measures in 2015 and 2016. Agreement continues to be relatively mixed on this issue including a significant minority undecided (33% neutral or unsure). 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, continue to include female residents and residents aged 18-34 years. South West region presents a more critical target, given the location of the airport. 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 and residents aged 55 years and over.

	<ul style="list-style-type: none"> • 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, including living/working in the area. • 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 lower level of favourability of the airport measured in 2018 was accompanied by less positive views of some benefits, including bringing jobs to the region supporting a growing population and economy, and boosting business and tourism. • The decline in perception of job growth was most significant in South West region. • However, around half of residents continue to express concern about increases in traffic and noise. 	<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. They should also provide evidence of such benefits as development progresses. • Key issues to address include those showing a decline in positive sentiment: how the airport will bring jobs to the region and support a growing population and economy, how it will boost business and tourism, and how it will support Sydney (Kingsford Smith) Airport. • A key area for promotion is South West region. • 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. • Strategies to address potential increases in traffic during road upgrades should also be communicated, as well as demonstrated as development progresses.
Identify preferred (unpaid) channels for communication	
<ul style="list-style-type: none"> • Television news/current affairs programs and printed newspaper articles continue to be relatively strongly reported as media sources of information about the airport; along with local sources and social media being 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 information about the airport. • As noted, mainstream media, in particular television news/current affairs, provides good broad exposure. • For younger residents, these include some traditional sources (television news/current affairs), as well as 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 three key research objectives for the surveys were as follows:

- Understand current awareness levels 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.

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 May-June 2018 survey was the fourth wave in the current series, following the benchmark survey in May-June 2017 and further waves in September-October 2017 and February-March 2018. The May-June 2018 wave had a sample target of 900, and a final sample of 903. 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 target audience 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. Inner West region was included for tracking awareness and sentiment as the operation of a second international airport in Sydney can provide potential future benefits to that area by limiting demands on Sydney (Kingsford Smith) Airport and the associated environmental impacts.

Table 1: Western Sydney Regions and Local Government Areas for the May-June 2017, September-October 2017, February-March 2018 and May-June 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	<i>Included due to incorporation into Inner West Council</i>
North West	Baulkham Hills Blacktown Blue Mountains Hawkesbury Penrith	
West Central	Auburn Bankstown Canterbury Fairfield Holroyd Parramatta	<i>Included due to merger with Bankstown</i> <i>Maintained in West Central</i>

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.

As such changes may have had some effect on results when comparing individual regions, compared with earlier surveys, the first survey in the current research project was positioned as a new benchmark.

3.3. Sampling and Weighting

Quotas for the May-June 2018 survey were set by age, gender and region. As this was the last survey in this current research project, there was an opportunity to increase the survey size to a target of 900 compared with the target of 600 in the previous two waves. The sampling was set overall to targets of 250 in each of the two regions with larger population (North West and West Central) and 200 in each of the two smaller regions (South West and Inner West). These sample sizes compared with 150 in each region in the earlier two tracking waves. 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 900 is $\pm 3.3\%$
- 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:

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.

- 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.

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 May-June 2018 survey are presented as the main results.

Comparisons with earlier waves in the current series (the May-June 2017 benchmark, the September-October 2017 tracking wave, and the February-March 2018 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	W3
Wave 4	May-June 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., in Table 6, 18-34 years age group highlighted as highlighted as higher for '4-6 Neutral'). 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 May-June 2018 in Table 7. The four results add to 101% rather than 100% due to rounding.

3.6. Sample Profile

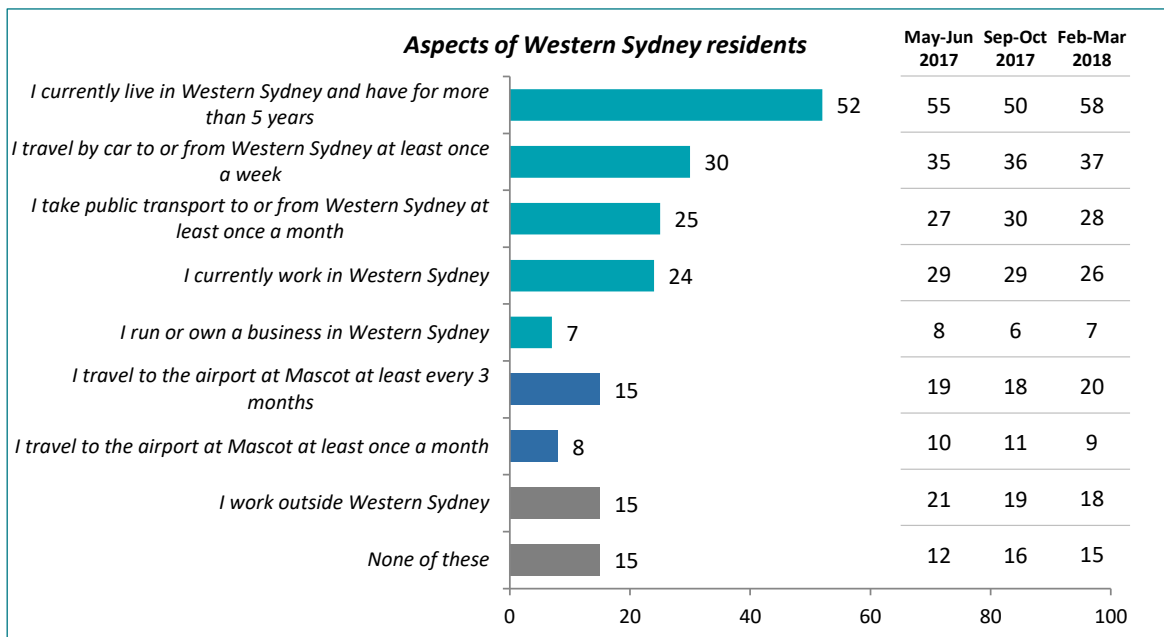
Table 3 outlines the unweighted demographic breakdown of the May-June 2018 sample.

Table 3: Sample profile, unweighted (May-Jun 2018)

Variable	Profile	Total	
		%	n
Total	All	100	903
Gender	Male	50	447
	Female	50	456
Age	18-34	30	270
	35-54	32	288
	55+	38	345
Region	South West	22	202
	Inner West	22	200
	North West	28	251
	West Central	28	250
Culturally and Linguistically Diverse Background	Yes	27	243
	No	72	646
	Prefer not to say/Unsure	2	14
Aboriginal and/or Torres Strait Islander	Yes	1	11
	No	93	840
	Prefer not to say/Unsure	6	52
Education	Completed some high school	10	90
	High school graduate	19	168
	Technical college / TAFE	25	229
	Undergraduate degree	26	236
	Postgraduate degree	18	164
	Prefer not to say	2	16
Employment	Work full-time (≥ 35 hours per week)	41	373
	Work part-time (< 35 hours per week)	15	137
	Self-employed	5	44
	Retired	20	182
	In full time education	2	22
	Full time home / house duties	7	61
	Receiving government allowance	1	7
	Not currently employed	5	45
	Prefer not to say	0	0
Household Income	<\$40k	16	143
	\$40,000 - \$64,999	14	123
	\$65,000 - \$79,999	10	91
	\$80,000 - \$99,999	12	111
	\$100,000 - \$119,999	9	83
	\$120k+	19	169
	Prefer not to say/Unsure	20	183
Marital Status	Registered married	56	505
	De facto/cohabiting relationship	10	88
	Not married	32	289
	Prefer not to say	2	21
Parental Status	Children	29	263
	No Children	70	629
	Prefer not to say	1	11

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 (May-Jun 2018, and comparison with May-Jun 2017, Sep-Oct 2017 and Feb-Mar 2018)



Q17. Which of the following applies to you? Please select all that apply.

Base: All (May-Jun 18, n=903; Feb-Mar 18, n=613; Sep-Oct 17, n=615; May-Jun 17, n=1,244)

As in earlier surveys, residents in Inner West region in May-June 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 (May-Jun 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	52	64	12	67	47
I travel by car to or from Western Sydney at least once a week	30	32	15	33	32
I take public transport to or from Western Sydney at least once a month	25	27	13	29	24
I currently work in Western Sydney	24	29	10	31	22
I run or own a business in Western Sydney	7	7	4	10	6
I travel to the airport at Mascot at least every 3 months	15	15	23	10	17
I travel to the airport at Mascot at least once a month	8	7	13	7	7
I work outside Western Sydney	15	19	28	12	11
None of these	15	11	29	8	18
Sample size	903	202	200	251	250

Q17. Which of the following applies to you? Please select all that apply.

Base: All (n=903)

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

4 Key Measures

4.1. Definition of Metrics

The key metrics included ratings of sentiment towards the airport, and of benefits and concerns associated with the airport. Ratings were generally on 11-point scales with labels assigned to the anchor points, 0 and 10:

- for questions on favourability and benefits, 0=strongly disagree, 10=strongly agree
- for questions on concerns, 0=not at all concerned, 10= extremely concerned.

For a later question on importance of being informed about progress of the airport, the labels were:

- 0=not at all important, 10=very important.

The question on how much had been heard about the airport used a different type of scale with all points labelled:

- A great deal
- Quite a lot
- A small amount
- Hardly anything
- Nothing at all.

These descriptors were developed during the questionnaire development phase to discriminate different levels of knowledge about the airport, to enable benchmarking and tracking of changes.

Another key metric was on sources of information about the airport, involving selection from a list of items, with multiple selections allowed. This format was also used in other questions including preferred sources of communication, and awareness of initiatives and communications.

4.2. Sentiment

Measures of Sentiment

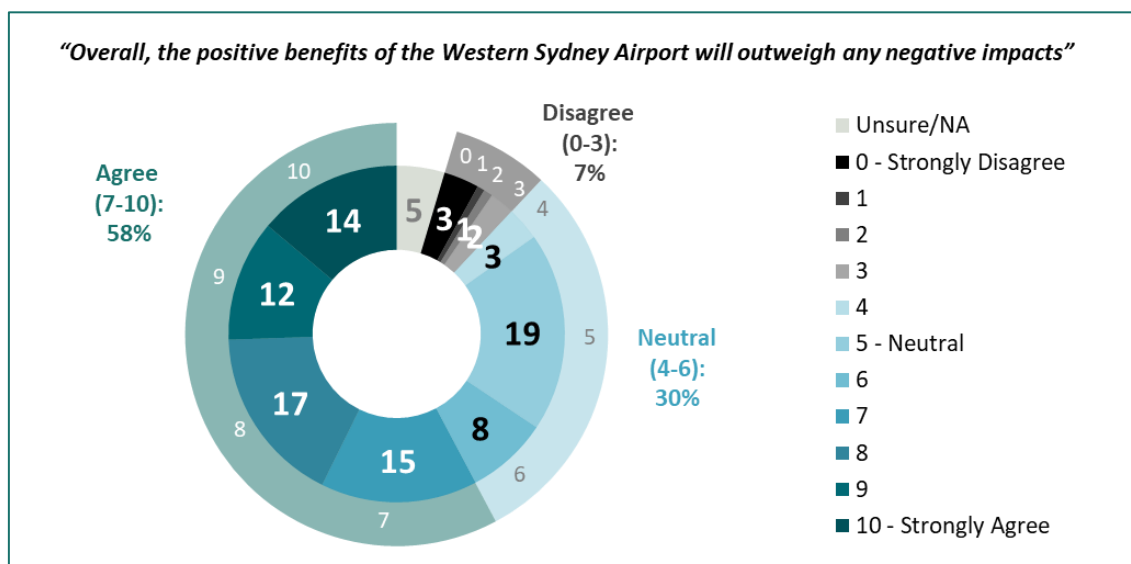
Sentiment towards the new Western Sydney Airport development at Badgerys Creek was measured through two key questions: perception that the overall benefits outweigh any negative impacts; and favourability of the development.

Perception that the overall benefits outweigh any negative impacts

In May-June 2018, the majority (58%) 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).

Agreement has been relatively stable since May-June 2017 (ranging from 56% to 63%), while maintaining an increase over results from surveys in 2016 (ranging from 48% to 49%) (Table 5). Disagreement in May-June 2018 was at a low level (7%). The increase in agreement starting in the May-June 2017 benchmark followed the announcement in the May 2017 federal budget that the Australian Government would deliver the airport.

Figure 2: Perception of overall benefits of Western Sydney Airport vs. negative impacts (May-Jun 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=903)

Compared with 2016, this increase was accompanied by decreases in both average disagreement (rating 0-3, from an average of 12% to 9% post-2016, including 7% in May-June 2018) and an average neutral/unsure position (from 40% to 32%, including 35% in May-June 2018) (Table 5).

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

Agreement	Overall, positive benefits of the Western Sydney Airport will outweigh any negative impacts									
	INITIAL BENCHMARK November 2014	June 2015	December 2015	April 2016	August 2016	December 2016	NEW BENCHMARK May-June 2017	Sep-Oct 2017	Feb-Mar 2018	May-Jun 2018
Rated 0-10	%	%	%	%	%	%	%	%	%	%
0-3 Disagree	11	14	11	11	12	12	8	8	11	7
4-6 Neutral	30	30	30	32	32	31	29	25	30	30
7-10 Agree	49	49	52	49	48	49	60	63	56	58
Don't know	10	7	7	8	8	8	2	4	3	5
Sample size	501	513	502	499	505	503	1244	615	613	903

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

Table 6: Perception of overall benefits of Western Sydney Airport vs. negative impacts, by demographics (May-Jun 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	7	7	8	7	6	10	13	5	8	5	6	8
4-6 Neutral	30	24	37	39	26	25	29	33	29	31	30	30
7-10 Agree	58	65	51	50	62	62	55	54	59	59	60	57
Don't know	5	4	5	4	6	4	3	8	4	5	4	4
Sample size	903	447	456	270	288	345	202	200	251	250	243	646

Q7. Agreement: “Overall, the positive benefits of the Western Sydney Airport at Badgerys Creek would outweigh any negative impacts”

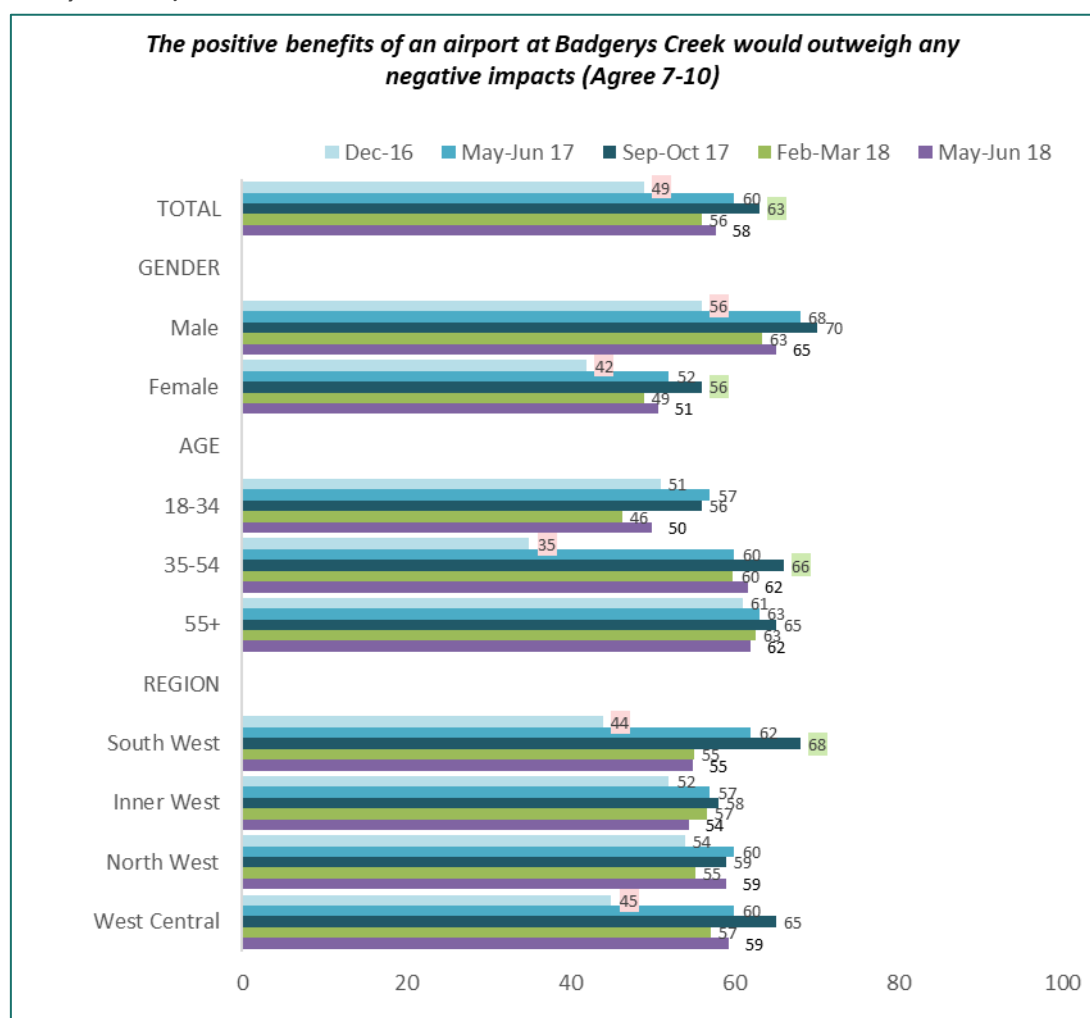
Base: All (n=903) Shading highlights statistically significantly higher and lower results between groups

Across the demographic groups, agreement with the proposition in May-June 2018 continued to be stronger among males (65% agreeing) than females (51%), with a corresponding main difference on the neutral position (24% vs. 37% respectively), rather than disagreement (Table 6). Among the age groups, the younger 18-34 years group continued to be the least likely to agree (50%) compared with the older groups (62% for both groups) and were also most likely to be neutral (39%, compared with 25–26% for the older groups). Agreement was similar across the regions (ranging from 54% to 59%).

Comparing the surveys by demographics shows the increase in agreement from December 2016 occurred mainly in South West region (where the development site is located) and West Central region, which were at lower levels in December 2016 (44% and 45% respectively) compared with the other two regions (Inner West – 52%, North West – 54%) (Figure 3). Agreement had peaked in September-October 2017 in both South West region (68%) and West Central region (65%), followed by some decrease although the results in May-June 2018 (55% and 59% respectively) still maintained an increase over December 2016. These changes resulted in a more uniform set of results in May-June 2018.

The overall increase in agreement had occurred primarily among residents aged 35-54 years, and among both male and female residents.

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



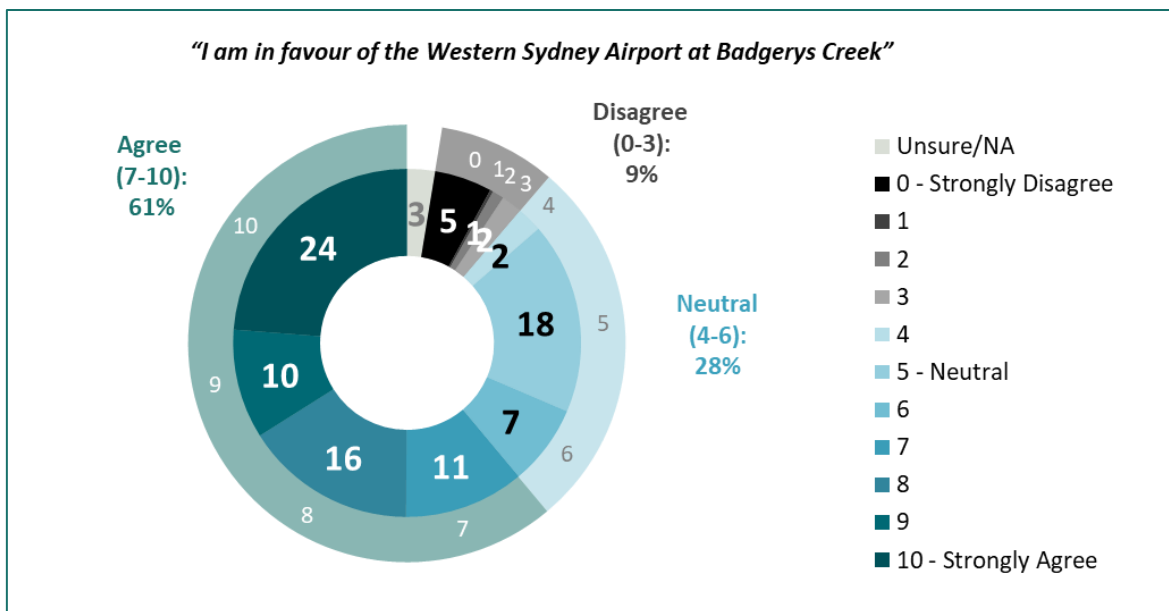
Q7. Agreement: "Overall, the positive benefits of the Western Sydney Airport at Badgerys Creek would outweigh any negative impacts"
Base: All (n=903)

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

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 May-June 2018, around three-fifths (61%) of residents were in favour (rating 7-10) (Figure 4), similar to February-March 2018 (60%). This result was below the peak in agreement seen in May-June 2017 (67%), but was maintained 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 (May-Jun 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=903)

The incidence of those unsure remained relatively low in May-June 2018 (3%), similar to the previous two in September-October 2017 (1%) and May-June 2018 (3%), and remaining below results in the three surveys in 2016 (in April, August and December, ranging from 6% to 8%). Some of the 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 May-Jun 2018)

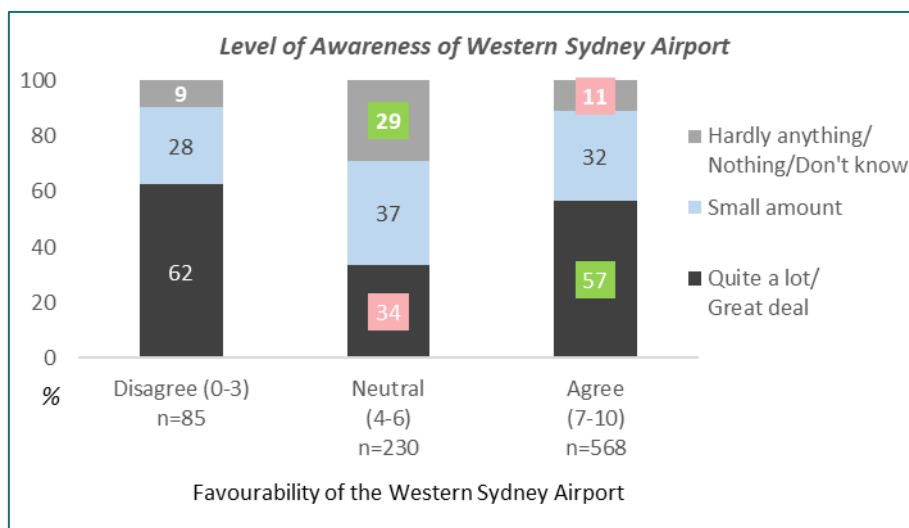
Sentiment towards the airport										
Agreement	November 2014	June 2015	December 2015	April 2016	August 2016	December 2016	NEW BENCHMARK May-June 2017	Sep-Oct 2017	Feb-Mar 2018	May-Jun 2018
Rated 0-10	%	%	%	%	%	%	%	%	%	%
0-3 Disagree	12	12	8	12	12	11	10	9	12	9
4-6 Neutral	28	25	25	25	26	25	22	24	27	28
7-10 Agree	54	56	61	57	56	56	67	64	60	61
Don't know	6	7	6	6	6	8	1	3	2	3
Sample size	501	513	502	499	505	503	1244	615	613	903

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, February-March 2018 and May-June 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 in Figure 5 for the May-June 2018 survey (*neutral* – 34% know ‘quite a lot/great deal’ vs. *disagree* – 62% and *agree* – 57%).

Figure 5: Level of awareness of the Western Sydney Airport at Badgerys Creek, by favourability (May-Jun 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 (n=903)

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 May-June 2018 (Table 8). The main differences were for:

- the younger 18-34 year old group to be least likely to hold a favourable sentiment (48% agreeing vs. 67% to 69% for the other age groups) and more likely to hold a neutral sentiment
- male residents (69%) were more likely than female residents (53%) to rate favourably
- residents from culturally and linguistically diverse communities were least likely to disagree (4% vs. 11% for other residents), which was confirmed when taking age into account.

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

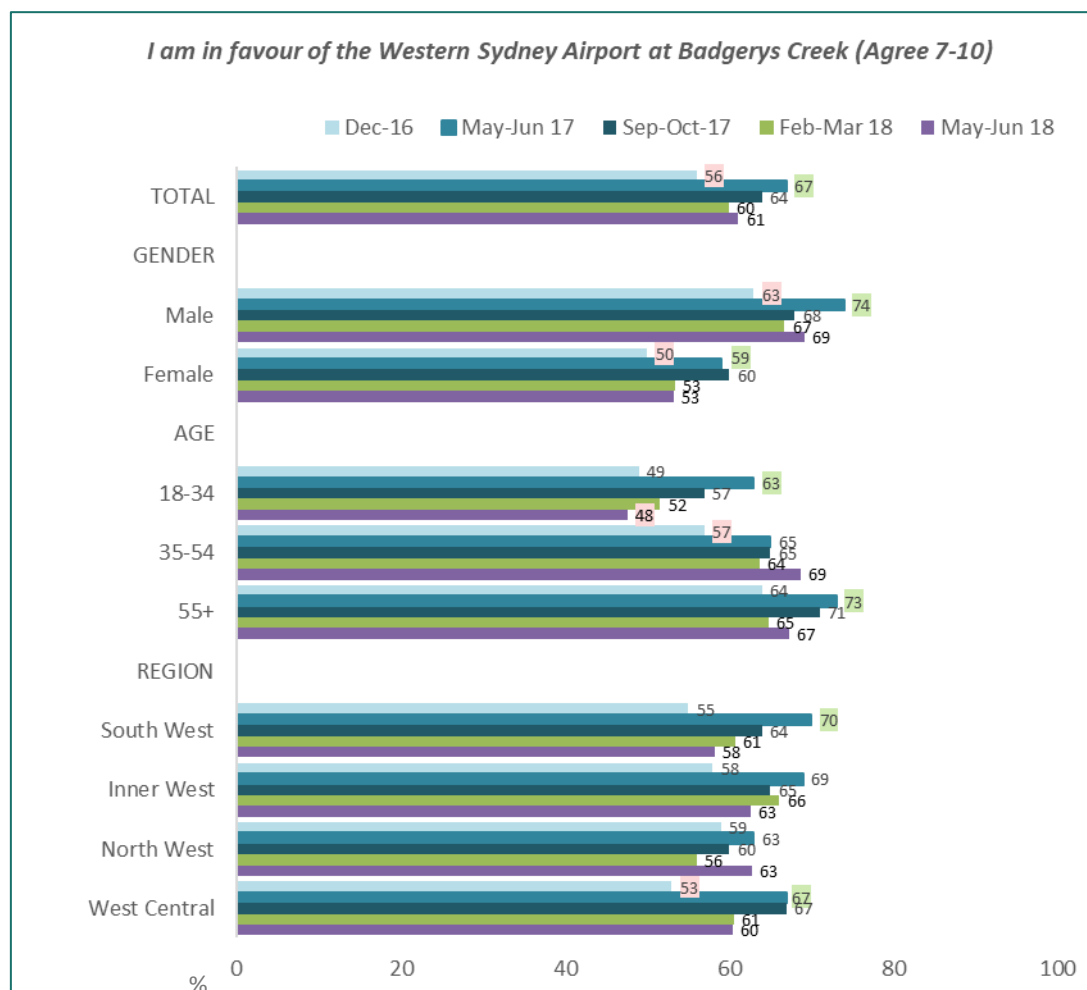
Agreement	TOTAL	Gender		Age			Location				Culturally and Linguistically Diverse	
		Male	Female	18-34	35-54	55+	South West	Inner West	North West	West Central	Yes	No
Rated 0-10	%	%	%	%	%	%	%	%	%	%	%	%
0-3 Disagree	9	6	11	7	6	14	17	6	10	5	4	11
4-6 Neutral	28	22	33	41	22	18	24	30	25	31	29	27
7-10 Agree	61	69	53	48	69	67	58	63	63	60	64	60
Unsure/NA	3	3	2	4	3	1	1	1	3	4	3	2
Sample size	903	447	456	270	288	345	202	200	251	250	243	646

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=903) Shading highlights statistically significantly **higher** and **lower** results

Comparing the surveys 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%) and May-June 2018 (61%), remaining marginally above the December 2016 result (Figure 6). This pattern of improvement and decline was similar in South West, Inner West and West Central regions, similar among both male and female residents, and stronger among residents aged 18-24 years and 55 years and over. In addition, the younger group declined to a similar level to 2016. The pattern differed among residents aged 35-54 years where a higher level of agreement was maintained. The results in May-June 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 May-Jun 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)

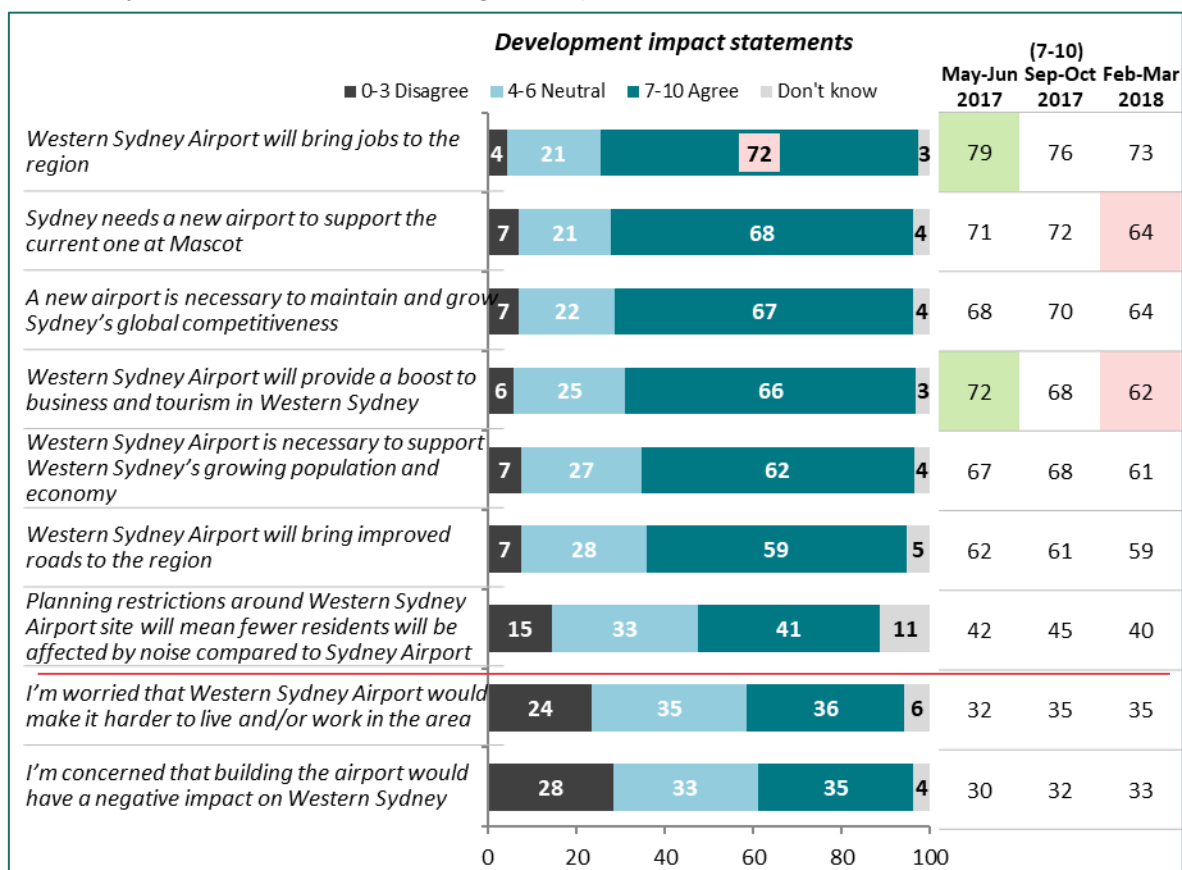
Shading highlights statistically significantly higher and lower results between waves

4.3. 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 a pattern for several benefits to have lower average agreement across the February-March 2018 and May-June 2018 surveys compared to the May-June 2017 benchmark, although the differences were not large (Figure 7). Of the three benefits that had relatively low results in February-March 2018, two showed some recovery in May-June 2018.

Figure 7: Perception of impacts of Western Sydney Airport development (May-Jun 2018, and comparison with May-Jun 2017, Sep-Oct 2017 and Feb-Mar 2018 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 (May-Jun 2018, n=903; 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

Benefits

In May-June 2018, around three-quarters (72%) of residents continued to agree (rating 7-10) that the airport will 'bring jobs to the region' (Figure 7). Other benefits specifically to Western Sydney with over half agreeing included 'boost to business and tourism in Western Sydney' (66%), 'necessary to support Western Sydney's growing population and economy' (62%) and 'improved roads to the region' (59%). A similar level of support was evident for some broader benefits to Sydney, including needing the new airport to 'support the current airport at Mascot' (68%) and to 'maintain and grow Sydney's global competitiveness' (67%).

Agreement had been relatively low in February-March 2018 compared with the May-June 2017 benchmark on three benefits. Two showed some recovery in May-June 2018:

- 'Western Sydney Airport will provide a **boost to business and tourism** in Western Sydney' (62% in February-March 2018, 66% in May-June 2018)
- 'Sydney needs a new airport to **support the current airport at Mascot**' (64% in February-March 2018, 68% in May-June 2018).

One of the benefits, however, remained at the lower level of agreement:

- 'Western Sydney Airport is necessary to **support Western Sydney's growing population and economy**' (61% in February-March 2018, 62% in May-June 2018).

A further benefit was also confirmed as having lower agreement in May-June 2018:

- 'Western Sydney Airport will **bring jobs to the region**' (72% in May-June 2018 vs. 79% in May-June 2017).

Overall, average agreement with the main six benefits was higher in the surveys in 2017, and lower in the surveys in 2018, showing broad consistency with the trends in favourability:

- May-June 2017: 70%
- September-October 2017: 69%
- February-March 2018: 64%
- May-June 2018: 66%.

Concerns

Agreement in May-June 2018 continued to be lower for a perception that fewer residents will be affected by noise compared with Sydney (Kingsford Smith) Airport (41%), with over two-fifths (44%) neutral or unsure (Figure 7). There also continued to be greater polarisation on perception of *concerns* about building the airport, with relatively higher disagreement (rating 0-3), including:

- making it '**harder to live and/or work** in the area' (36% agree, 24% disagree)
- having '**a negative impact on Western Sydney**' (33% agree, 28% disagree).

While overall concern about a negative impact of building the airport was relatively similar across the four surveys during 2017 and 2018 (ranging from 30% to 35%), it represented an increasing trend following the lower concern in May-June 2017 (30%), with the result in May-June 2018 (35%) returning to the level seen across 2015-2016 (averaging 36%). The pattern of results since 2016 was consistent with trends in favourability towards the airport (Table 9).

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

Concerned about the negative impact building an 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	May-Jun 2018
<i>Rated 0-10</i>	%	%	%	%	%	%	%	%	%	%
0-3 Disagree	25	22	21	24	23	25	34	33	32	28
4-6 Neutral	37	38	41	35	38	32	34	33	32	33
7-10 Agree	33	36	34	37	35	36	30	32	33	35
Don't know	5	4	4	4	4	6	2	2	3	4
Sample size	501	513	502	499	505	503	1244	615	613	903

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

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 not been as well maintained into May-June 2018 (28%) (Table 10).

Looking at the demographic breakdown, May-June 2018 continued to see greater disagreement among residents aged 55 years and older (41%) reducing with age to be lowest among residents

aged 18-34 years (18%) (Table 10). Disagreement was greater for male residents (33%) compared with female residents (24%).

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

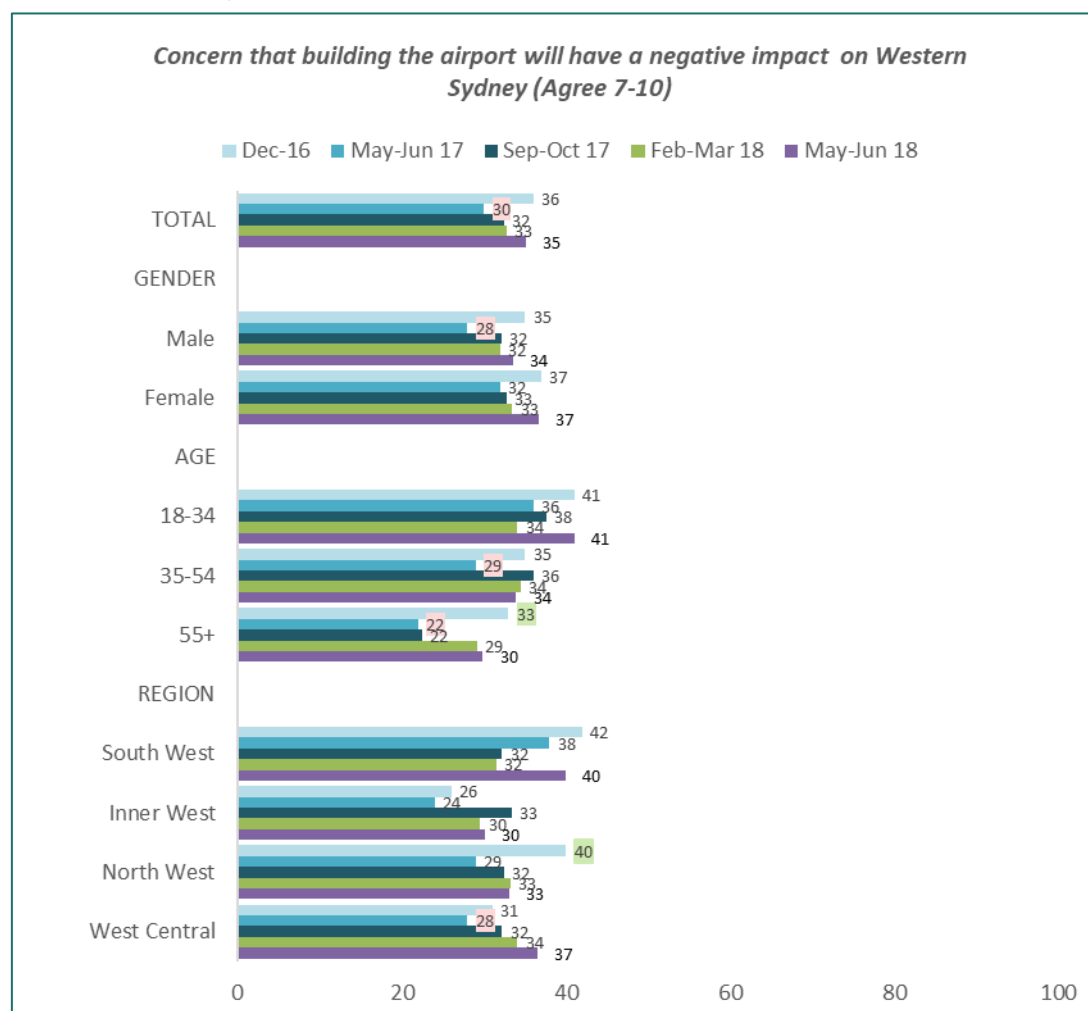
Agreement	TOTAL	Gender		Age			Location				Culturally and Linguistically Diverse	
		Male	Female	18-34	35-54	55+	South West	Inner West	North West	West Central	Yes	No
Rated 0-10	%	%	%	%	%	%	%	%	%	%	%	%
0-3 Disagree	28	33	24	18	27	41	30	34	28	25	29	28
4-6 Neutral	33	30	35	37	35	26	25	31	36	35	30	34
7-10 Agree	35	34	37	41	34	30	40	30	33	37	37	34
Unsure/NA	4	4	4	4	4	3	5	5	3	4	3	4
Sample size	903	447	456	270	288	345	202	200	251	250	243	646

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=903)

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

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 (May-June 2018, n=903; 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

Comparing results over time, the decline in concern post-2016 occurred primarily in South West region and North West region (Figure 8). This decline was accompanied by trend for an increase in concern in Inner West region, which resulted in a more uniform level of concern across the regions. In May-June 2018 there was an indication of an increase in concern in South West region (40%) to the 2016 level (42%), along with an increasing trend in West Central region. The overall pattern of decline and increase was seen among both male and female residents and across the age groups.

There were no significant differences on the statements between the regions in May-June 2018 (Table 11). There was a trend, similar to February-March 2018, for agreement that ‘...fewer residents will be affected by noise compared to Sydney Airport’ to be lower in South West and North West regions. Some of the marginal improvements in positive perceptions from with February-March 2018 led to less difference between the regions compared with the May-June 2017 benchmark. The only significant decline in February-March 2018 was agreement in South West region that the airport will:

- ‘bring jobs to the region’ (from 81% in May-June 2017 to 68% in May-June 2018).

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

Agreement	May-Jun 2018				REGION											
					Statistically significant change from May-Jun 17 (BW) / Sep-Oct 17 (W2) / Feb-Mar 18 (W3)											
	South West	Inner West	North West	West Central	South West			Inner West			North West			West Central		
Rated 7-10	%	%	%	%	BW %	W2 %	W3 %	BW %	W2 %	W3 %	BW %	W2 %	W3 %	BW %	W2 %	W3 %
The Western Sydney Airport will bring jobs to the region	68	71	71	75	-13	-	-	No changes	No changes	No changes						
Sydney needs a new airport to support the current one at Mascot	64	71	71	68	-	-	-									
A new airport is necessary to maintain and grow Sydney’s global competitiveness	62	68	72	66	-	-	-									
Western Sydney Airport will provide a boost to business and tourism in Western Sydney	62	67	68	65	-	-	-									
Western Sydney Airport is necessary to support Western Sydney’s growing population and economy	59	60	64	61	-	-	-									
The Western Sydney Airport will bring improved roads to the region	59	62	60	56	-	-	-									
Planning restrictions around the Western Sydney Airport site will mean fewer residents will be affected by noise compared to Sydney (Kingsford Smith) Airport	38	44	37	45	-	-	-									
I’m worried that Western Sydney Airport would make it harder to live and/or work in the area	37	32	38	35	-	-	-									
I’m concerned that building the airport would have a negative impact on Western Sydney	40	30	33	37	-	-	-									
Sample size	202	200	251	250												
Highlighting statistically significantly higher and lower results:	between regions in May-Jun 2018				comparing each region with May-Jun 2017 / Sep-Oct 2017 / 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?

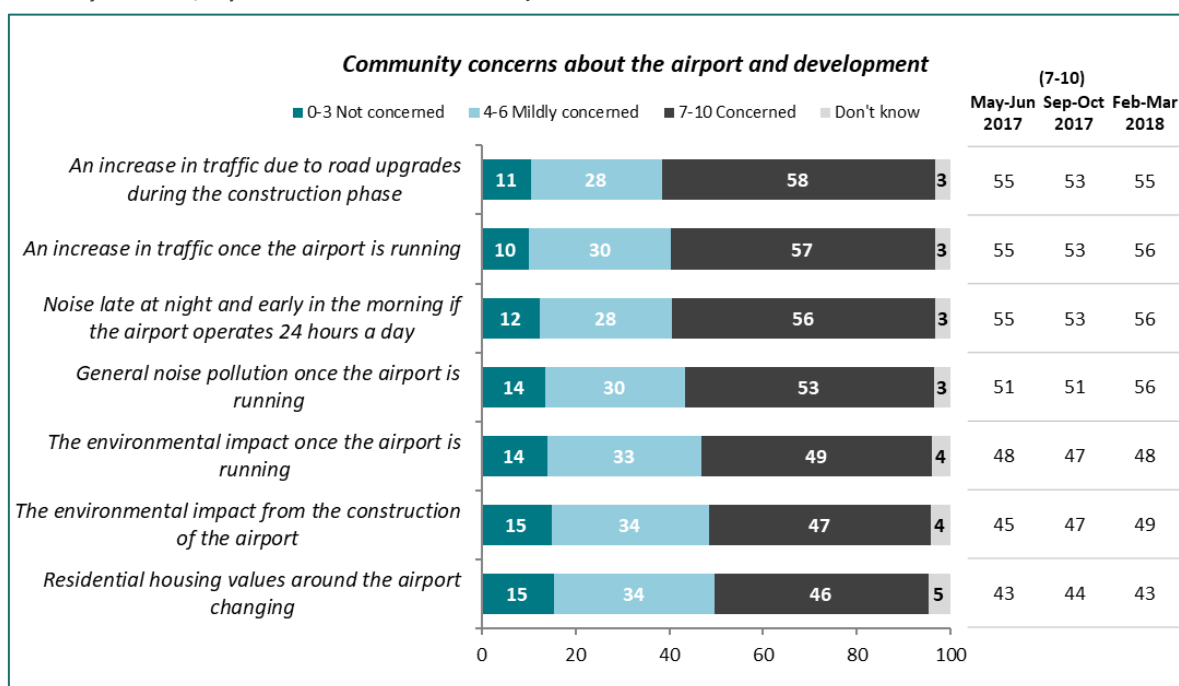
Base: All (May-Jun 18, n=903; Feb-Mar 18, n=613; Sep-Oct 17, n=615; May-Jun 17, n=1,244)

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 surveyed in May-June 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' (58%)
- 'an **increase in traffic** once the airport is running' (57%)
- '**noise late at night and early in the morning** if the airport operates 24 hours a day' (56%)
- '**general noise pollution** once the airport is running' (53%).

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



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 (May-Jun 18, n=903; Feb-Mar 18, n=613; Sep-Oct 17, n=615; May-Jun 17, n=1,244)

In May-June 2018, female residents continued to be more likely than male residents to express concern about all seven issues presented, averaging 14 percentage points higher (ranging from 12 to 15 percentage points). The largest differences were concern about the environmental impact, similar to the February-March 2018 survey (although gaps were more consistent across the concerns in the latest survey):

- 'from the **construction of the airport**' (females: 55% vs. males: 40%)
- '**once the airport is running**' (females 57% vs. males: 41%).
- There were no significant differences measured between the regions in May-June 2018 (Table 12). Agreement in Inner West about 'residential housing values around the airport changing' had increased from May-June 2017 (32%) in the two subsequent surveys (September-October 2017 – 44%, February-March 2017 – 48%), but declined in May-June 2018 (30%) to the earlier level.³

³ The statement about 'changing' residential housing values in the context of the survey was positively associated with other concerns about the impact – i.e., it is interpreted here as a concern about *decreasing* values.

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

Concern	REGION																
	May-Jun 2018				Statistically significant change from May-Jun 17 (BW) / Sep-Oct 17 (W2) / Feb-Mar 18 (W3)												
	South West	Inner West	North West	West Central	South West			Inner West			North West			West Central			
Rated 7-10	%	%	%	%	BW %	W2 %	W3 %	BW %	W2 %	W3 %	BW %	W2 %	W3 %	BW %	W2 %	W3 %	
An increase in traffic due to road upgrades during the construction phase	59	50	61	59	No changes				-	-	-	No changes				No changes	
An increase in traffic once an airport is running	56	46	60	57					-	-	-						
Noise late at night and early in the morning if the airport operates 24 hours a day	57	44	63	55					-	-	-						
General noise pollution once an airport is running	58	43	60	49					-	-	-						
The environmental impact once an airport is running	47	45	51	50					-	-	-						
The environmental impact from the construction of an airport	47	46	51	45					-	-	-						
Residential housing values around the airport changing	48	30	49	48					-	-14	-13						
Sample size	202	200	251	250													
Highlighting statistically significantly higher and lower results:	between regions in May-Jun 2018				comparing each region with May-Jun 2017 / Sep-Oct 2017 / Feb-Mar 2018												

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 (May-Jun 18, n=903; Feb-Mar 18, n=613; Sep-Oct 17, n=615; May-Jun 17, n=1,244)

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 surveys—February-March 2018 and May-June 2018—to give a more stable assessment of recent perceptions.

A principal components analysis was conducted on the statements about benefits and concern using the full 0-10 rating scale. This type of analysis identifies which statements have similar patterns of ratings. Three groupings of statements were identified: **environmental impacts**, **overall negative impact on the area** of the airport development, and **benefits** the airport will bring. This pattern was similar to that observed previously. 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 about **negative impact overall and harder to live/work in the area** (higher score = more concern ■)
- **meeting needs, and providing improvements and benefits** (higher score = greater benefit ■).

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

Demographic groups	Environmental impacts More impact ⇨	Negative impact + harder to live/work in area More concern ⇨	Meeting needs, improvements and benefits More benefit ⇨
GENDER			
Male	6.0	5.0	7.2
Female	6.8	5.5	6.9
AGE (years)			
18-34	6.6	5.7	6.7
35-54	6.5	5.3	7.2
55+	6.1	4.7	7.2
REGION			
South West	6.5	5.3	6.9
Inner West	6.0	4.8	7.2
North West	6.6	5.2	7.0
West Central	6.4	5.4	7.2
CALD			
Yes	6.4	5.2	7.3
No	6.4	5.2	7.0
	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 May-June 2018

Statistically significantly more **positive** and **negative** sentiment between groups

Key differences between the groups remained similar to the earlier analysis, but with some increased uniformity resulting from the average reduction in positive sentiment, as noted:

Concerns

- GREATER CONCERN among **female** residents on **negative impact on the area** and about **environmental impacts** of building and operating the airport
- LOWEST CONCERN among residents **aged 18-34 years** about **negative impact on the area**
- GREATEST CONCERN among residents **aged 55 years and over** about **negative impact on the area**
- LOWEST CONCERN about **environmental impacts** and **overall negative impact on the area** among residents in **Inner West** region

Benefits

- GREATER BENEFITS among **male residents**
- LOWER BENEFITS among **residents aged 18-34 years**
- GREATER BENEFITS among residents from **culturally and linguistically diverse communities**.⁴

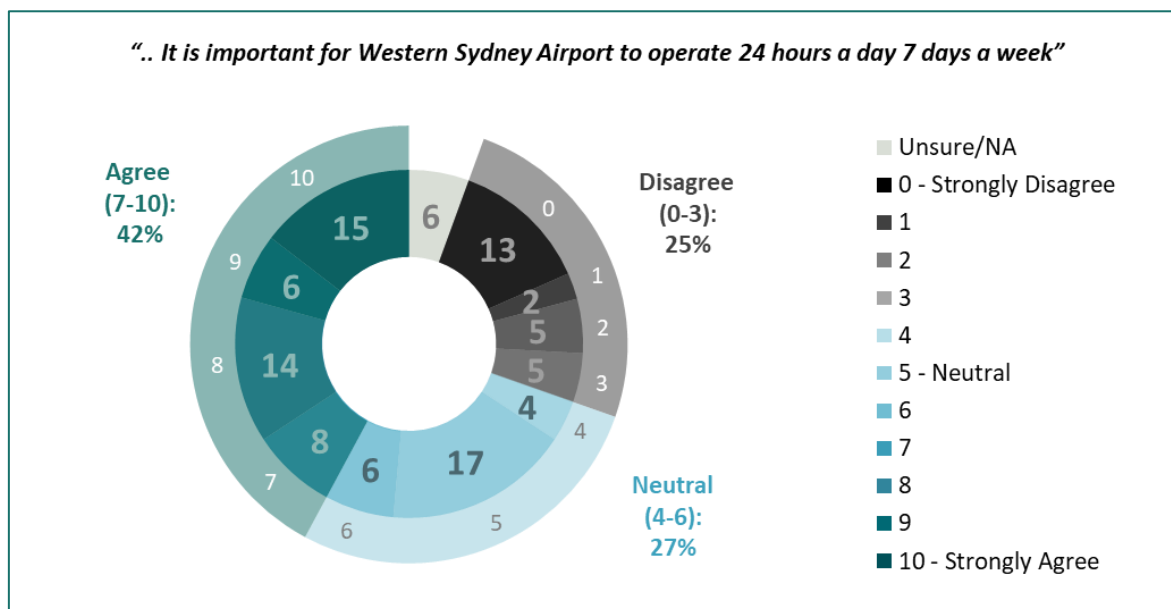
⁴ As noted previously, the measured difference was not related to CALD residents in the survey being on average younger.

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

4.4. 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. Around two-fifths (42%) of residents in May-June 2018 agreed (rating 7-10) that it was important (Figure 11). This result was similar to February-March 2018 (40%).

Figure 11: Perception of importance of the airport operating 24 hours a day, 7 days a week (May-Jun 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=903)

The results in the latest two surveys (40–42%) were low relative to full survey series from 2015 (averaging 47%), including the results in May-June 2017 (45%) and September-October 2017 (47%) (Table 13). Disagreement (rating 0-3) with importance (25%) in May-June 2018 continued the higher level observed from the May-June 2017 benchmark onwards (25+%) compared with the average across 2015-2016 (18%, over a relatively narrow range of 17% to 20%) (Table 13). A third (33%) of residents in May-June 2018 were undecided (rating 4-6 or unsure).

Table 13: Perception of importance of the airport operating 24 hours a day, 7 days a week, by waves (Nov 2014 to May-Jun 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	May-Jun 2018
Rated 0-10	%	%	%	%	%	%	%	%	%	%
0-3 Disagree		17	17	20	19	19	27	25	31	25
4-6 Neutral		29	24	27	26	24	24	24	26	27
7-10 Agree	NA	46	51	45	47	48	45	47	40	42
Don't know		8	8	8	8	9	4	4	4	6
Sample size		513	502	499	505	503	1244	615	613	903

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 (30%) were again more likely than male residents (19%) to disagree with the importance of 24-hour operation (Table 14), although disagreement by female residents had decreased from February-March 2018 (40%). Male residents were more likely to agree (51% vs. 34%) (Table 14). Residents aged 55 years and over (38%) were also more likely to disagree particularly compared with those aged 18-34 years (16%); and with the corresponding difference largely in the neutral position (Table 14). The lower disagreement among culturally and linguistically diverse residents (15% vs. 29% among other residents) continued the pattern seen in the earlier three surveys in 2017 and 2018.

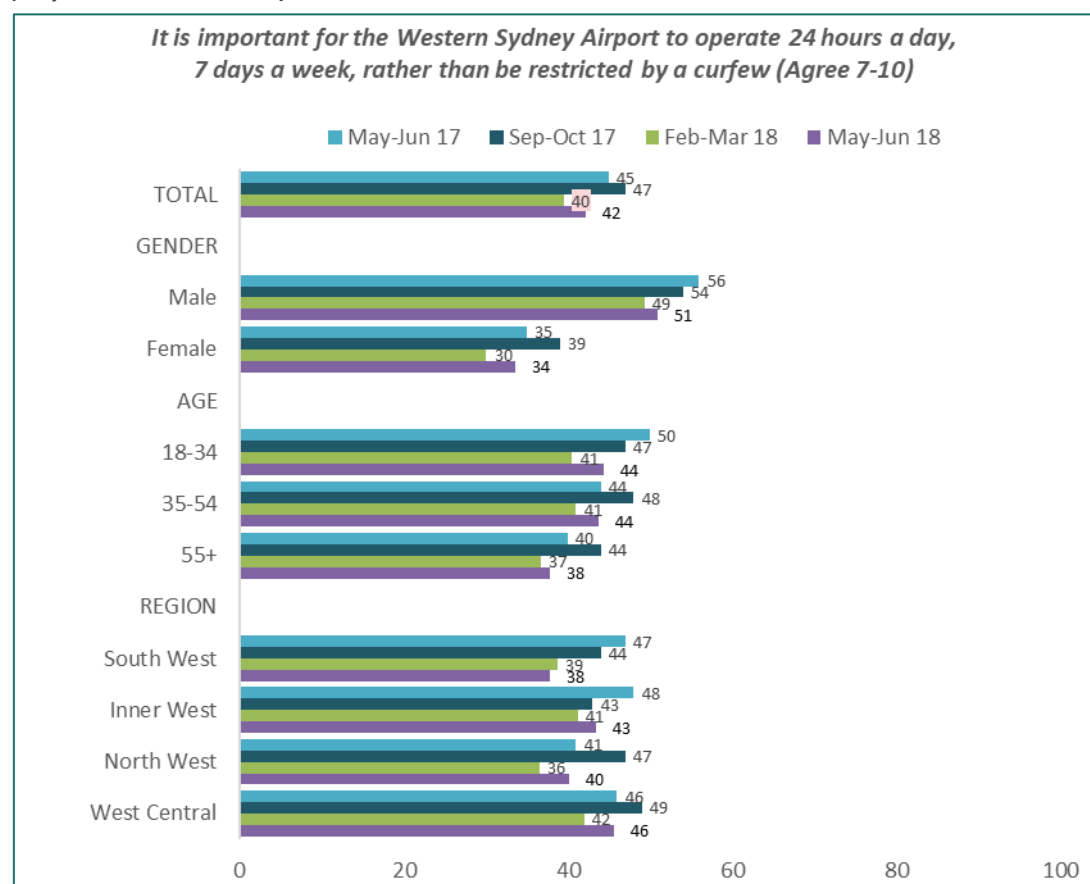
Table 14: Perception of importance of the airport operating 24 hours a day, 7 days a week, by demographics (May-Jun 2018)

Agreement	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 Disagree	25	19	30	16	22	38	27	27	28	20	15	29
4-6 Neutral	27	24	31	32	30	20	29	24	27	29	28	28
7-10 Agree	42	51	34	44	44	38	38	43	40	46	53	38
Unsure/NA	6	6	5	8	5	4	6	5	5	5	4	6
Sample size	903	447	456	270	288	345	202	200	251	250	243	646

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=903) 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 (May-Jun 18, n=903; Feb-Mar 18, n=613; Sep-Oct 17, n=615; May-Jun 17, n=1,244)

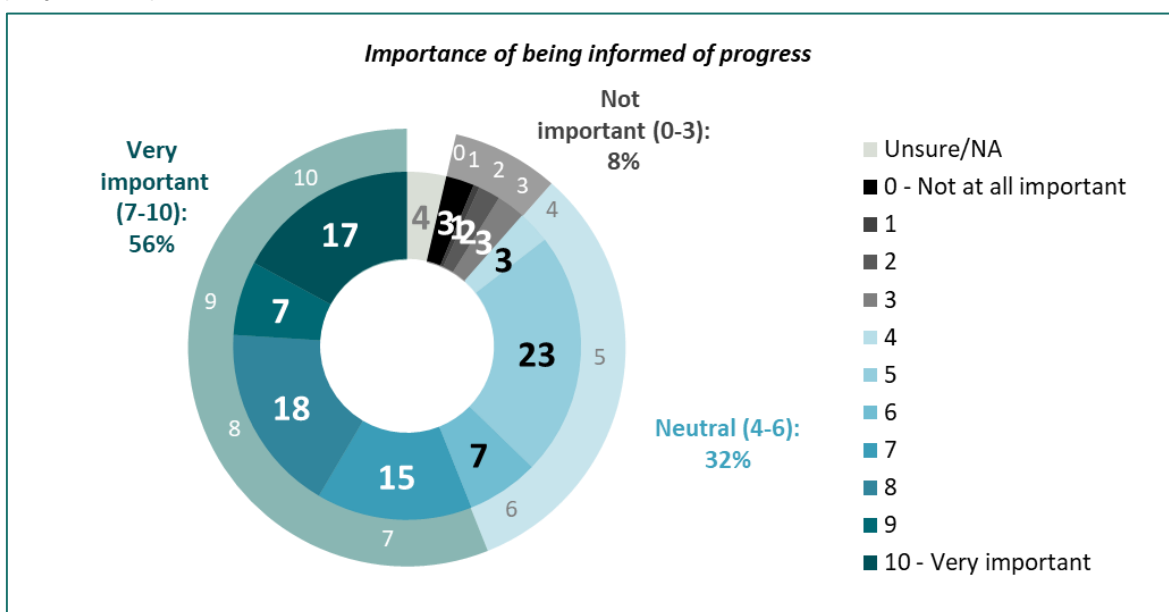
Shading highlights statistically significantly **higher** and **lower** results between waves

Agreement in May-June 2018 was similar to February-March 2018 for the main demographic groups, including the four regions (Figure 12). The lower average results for the two surveys in 2018 compared with the two surveys in 2017 also occurred across all the groups.

4.5. Communications

The majority (56%) of residents in May-June 2018 continued to consider that it was important (rating 7-10) to be kept informed of progress with development of the airport, with less than one in ten (8%) considering that it was not important (rating 0-3) (Figure 13). These results have remained relatively stable across the full survey series since 2014 (ranging from 56% to 64%), although the May-June 2018 result was conformed as relatively low (Table 15).

Figure 13: Perception of importance of being informed about progress of the Western Sydney Airport's development (May-Jun 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=903)

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

Being informed about progress										
Importance	November 2014	June 2015	December 2015	April 2016	August 2016	December 2016	New Benchmark May-Jun 2017	Sep-Oct 2017	Feb-Mar 2018	May-Jun 2018
Rated 0-10	%	%	%	%	%	%	%	%	%	%
0-3 Not important	9	7	7	6	8	7	8	7	10	8
4-6 Neutral/ Unsure	33	29	31	34	33	31	33	34	30	32
7-10 Very important	58	64	62	60	59	62	59	57	60	56
Sample size	501	513	502	499	505	503	1244	615	613	903

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, Feb-Mar 2018 and May-Jun 2018

There were no strong differences measured between the demographic groups in May-June 2018 (Table 16). There were trends for:

- male residents to be more likely to rate being informed as important (60% vs 52% for female residents)
- residents in Inner West region to be least likely to consider it as important (47% vs. 56-61% for the other regions), and confirmed as statistically lower when combined with a similar trend in February-March 2018.

There were no significant differences measured between February-March 2018 and the earlier three surveys for any of the regions (Table 17). There was a trend for a decrease in the importance of being informed in South West region (from 66% in May-June 2017 to 56% in May-June 2018).

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

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
<i>Rated 0-10</i>	%	%	%	%	%	%	%	%	%	%	%	%
0-3 Not important	8	5	10	7	6	11	11	11	5	8	6	9
4-6 Neutral	32	31	34	34	36	27	32	38	30	33	34	32
7-10 Important	56	60	52	55	54	60	56	47	61	55	57	56
Unsure	4	4	3	5	4	2	1	4	4	4	3	3
Sample size	903	447	456	270	288	345	202	200	251	250	243	646

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=903)

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

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

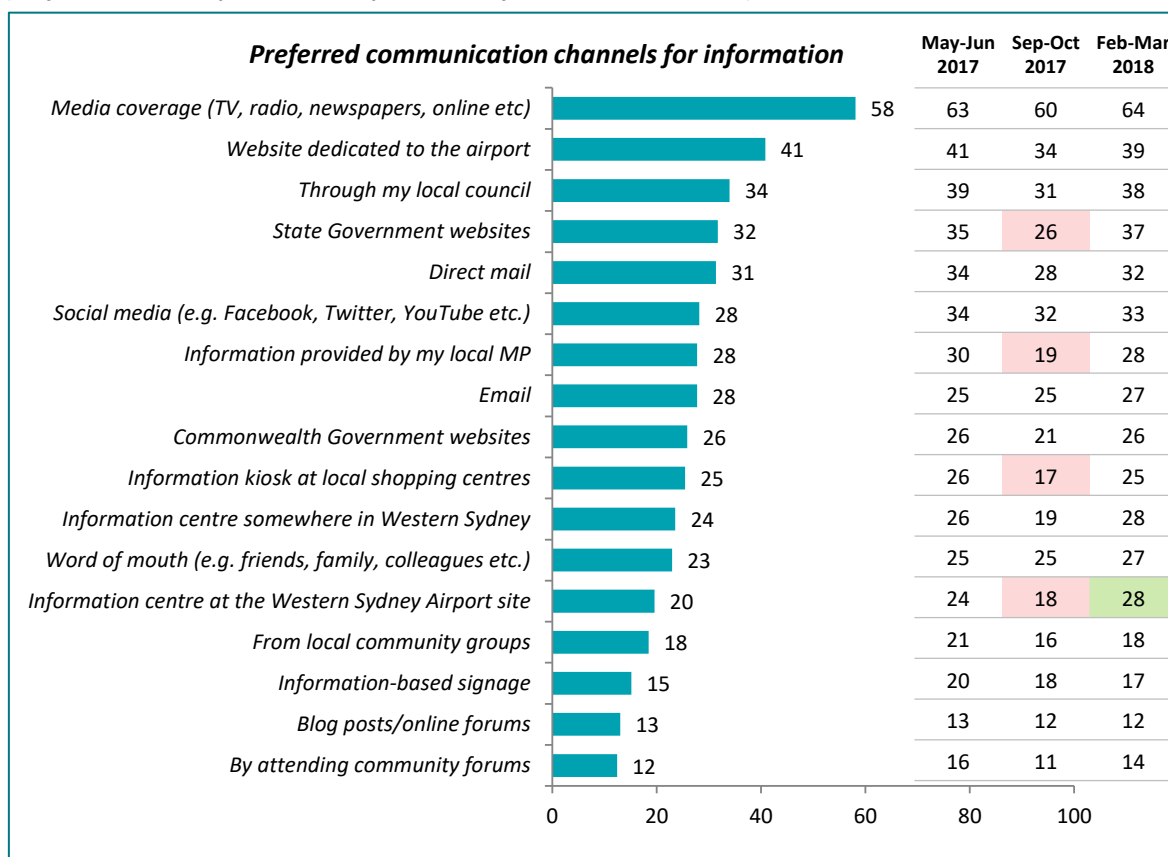
Importance	REGION				Statistically significant changes from earlier waves
	May-Jun 2018				
	South West	Inner West	North West	West Central	
Rated 0-10	%	%	%	%	No changes
0-3 Not important	11	11	5	8	
4-6 Neutral	32	38	30	33	
7-10 Important	56	47	61	55	
Unsure	1	4	4	4	
Sample size	202	200	251	250	
Highlighting statistically significantly higher and lower results:	between regions in May-Jun 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 (May-Jun 18, n=903; 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 around three-fifths (58%) of residents in May-June 2018, broadly similar to the results in the earlier three surveys in 2017 and 2018 (ranging from 60% to 64%) (Figure 14). The next three channels represented both local and online sources, including a dedicated website (41%), local council (34%) and state government websites (32%), similar to February-March 2018.

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



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

There had been a decrease in the nominations of several channels in September-October 2017 compared with May-June 2017, including a dedicated website, local council and local MP, 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, preference in February-March 2018 and May-June 2018 reverted to similar levels in May-June 2017 for most of the channels. An exception was preference for the information centre at the Western Sydney Airport site, which had peaked in February-March 2018 (28%) and was relatively low in May-June 2018 (20%).

Relatively few residents were, again, interested in getting information from blog posts/online forums (13%) or by attending community forums (12%).

A comparison of preferred channels showed some differences between the regions in May-June 2018, with two sources more preferred in South West region (Table 18).

- Local council:
 - most preferred in South West region (45%)
 - least preferred in (Inner West region (22%))
- Direct mail:
 - most preferred in South West region (49%)
 - least preferred in Inner West region (21%).

There was little change in preference within a region compared with earlier surveys. Preference for an information centre at the airport site was at its lowest in North West region compared with the

earlier surveys (16%) particularly compared with the peak preference in February-March 2018 (35%).

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

Agreement	May-Jun 2018				REGION											
					Statistically significant change from May-Jun 17 (BW) / Sep-Oct 17 (W2) / Feb-Mar 18 (W3)											
	South West	Inner West	North West	West Central	South West			Inner West			North West			West Central		
Rated 7-10	%	%	%	%	BW %	W2 %	W3 %	BW %	W2 %	W3 %	BW %	W2 %	W3 %	BW %	W2 %	W3 %
Media coverage	62	54	57	58	No changes	No changes					-	-	-	No changes		
Website dedicated to the airport	37	44	41	42							-	-	-			
Through my local council	45	22	39	28							-	-	-			
State Government websites	26	38	33	31							-	-	-			
Direct mail	49	21	28	30							-	-	-			
Social media	28	27	26	31							-	-	-			
Information provided by my local MP	36	20	30	23							-	-	-			
Email	29	23	28	29							-	-	-			
Commonwealth Government websites	26	22	27	26							-	-	-			
Information kiosk at local shopping centres	24	24	29	23							-	-	-			
Information centre somewhere in Western Sydney	18	18	29	23							-	-	-			
Word of mouth	21	27	24	21							-	-	-			
Information centre at Western Sydney Airport site	19	20	16	24							-	-	-16			
From local community groups	20	13	17	21							-	-	-			
Information-based signage	19	13	14	16							-	-	-			
Blog posts/online forums	12	11	12	16							-	-	-			
By attending community forums	15	15	13	10							-	-	-			
Sample size	129	112	175	157												
Highlighting statistically significantly higher and lower results:	between regions in May-Jun 2018				comparing each region with May-Jun 2017 / Sep-Oct 2017 / Feb-Mar 2018											

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

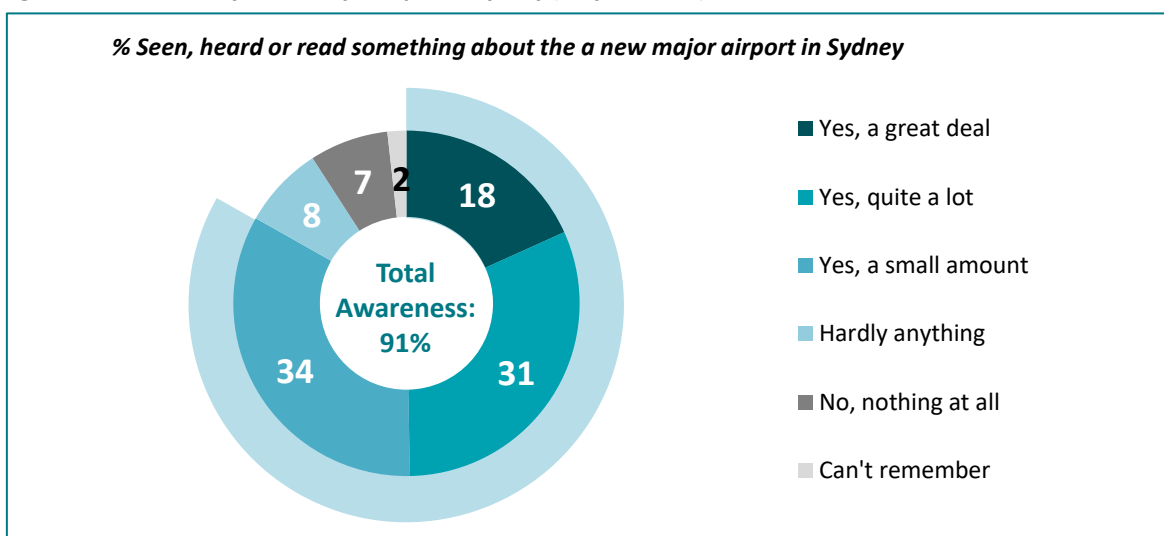
Base: Those who provided a rating of 6-10 rating of importance in being informed of the airport's development (n=573)

5 Other Measures

5.1. Awareness of Western Sydney Airport

A large majority (91%) of residents in May-June 2018 were aware of the development of a new major airport in Sydney (Figure 15), marginally above February-March 2018 (87%) and similar to the May-June 2017 benchmark (91%). This figure included a small minority (18%) of residents who considered they knew 'a great deal', again marginally above February-March 2018 (15%) and closer to the May-June 2017 (20%).

Figure 15: Awareness of a new major airport in Sydney (May-Jun 2018)



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

Base: All (n=903)

Key differences among the demographic groups in May-June 2018 were for residents aged 55 years and over (57%) and male residents (55%) to be more likely to consider they knew at least 'quite a lot' about the development of a new major airport (Table 19).

Table 19: Awareness of a new major airport in Sydney, by demographics (May-Jun 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	91	93	89	88	90	95	93	85	94	89	88	93
Great deal	18	20	16	18	18	18	21	14	21	16	21	17
Quite a lot	31	34	29	27	28	39	28	27	35	32	28	33
<i>Quite a lot/a great deal</i>	50	55	45	46	47	57	49	41	56	48	50	50
Small amount	34	31	36	34	35	30	39	33	31	33	32	34
Hardly anything	8	7	8	8	8	7	5	11	7	8	6	8
Nothing at all	7	6	9	10	7	4	5	14	5	8	10	6
Unsure/NA	2	2	2	2	2	1	2	1	1	3	2	1
Sample size	903	447	456	270	288	345	202	200	251	250	243	646

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

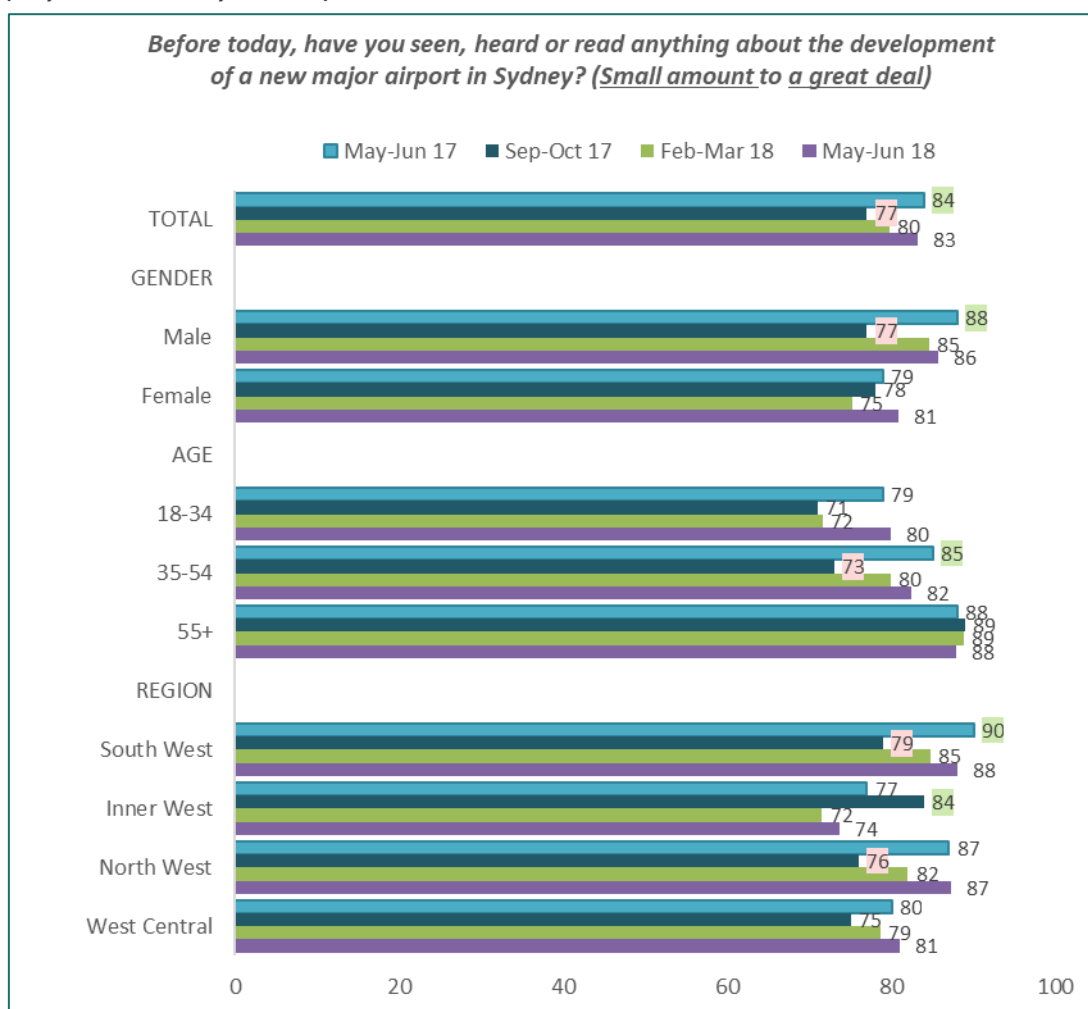
Base: All (n=903)

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

There was trend for residents in Inner West region (41%) to be less likely to hold such a view, and these residents were most likely to report knowing either nothing or 'hardly anything' about the airport (25% vs. 10-16% in the other regions).

Awareness of at least 'a small amount' had increased during 2018 to be at a similar level in May-June 2018 (83%) to the May-June 2017 benchmark (84%), after a decline in September-October 2017 (77%) (Figure 16). The decrease in September-October 2017 had primarily been in all regions except Inner West region, which had shown an increase from a lower base, and was primarily among male residents and those aged 35-54 years. This pattern for a decline and recovery had occurred in South West, North West and West Central regions. In contrast, awareness in Inner West region was lower in May-June 2018 (76%) compared with the other regions, particularly South West region (88%) and North West region (87%). The pattern was also similar for both male and female residents, and among residents aged 18-34 years and 35-54 years. In contrast, awareness among residents aged 55 years and over had remained consistently high through the surveys (a range of 88% to 89%).

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



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

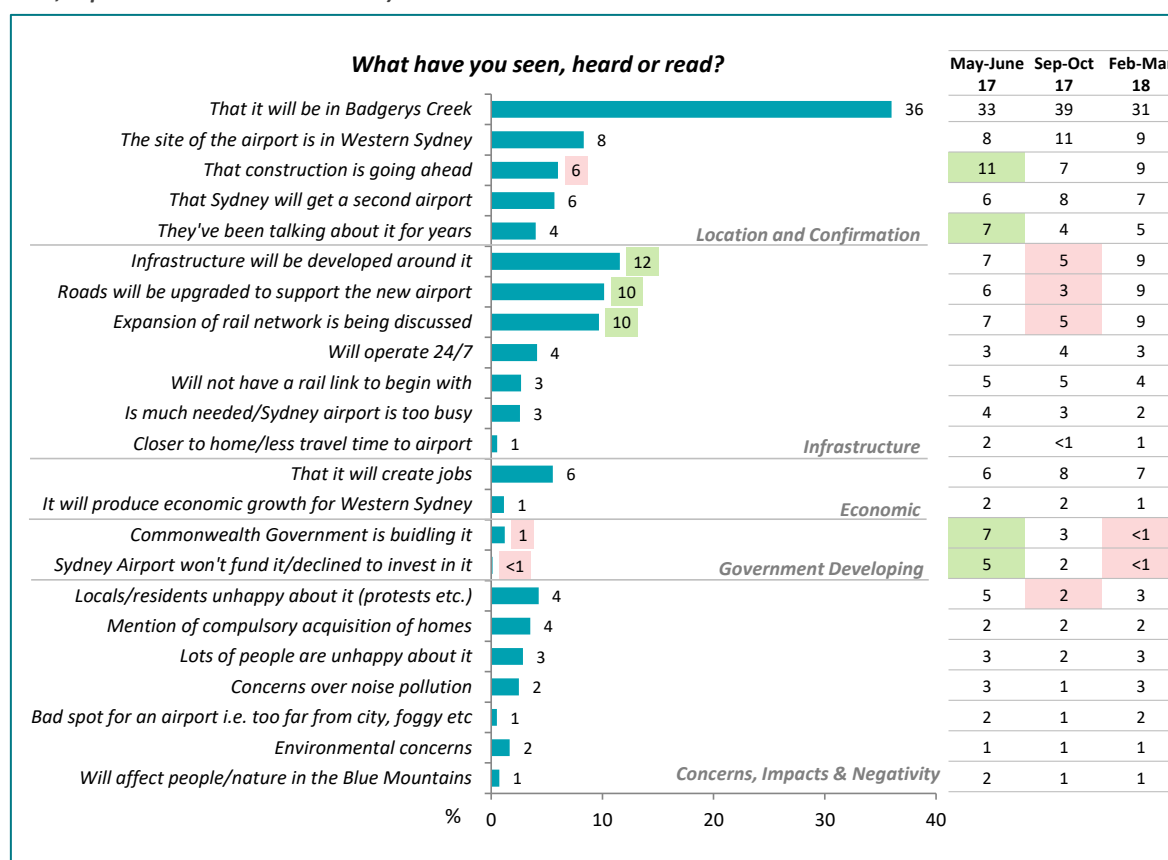
Base: All (May-Jun 18, n=903; Feb-Mar 18, n=613; Sep-Oct 17, n=615; May-Jun 17, n=1,244)

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. Over half (55%) of these residents in May-June 2018 mentioned something about the location of the airport or that it was going ahead, broadly similar to the earlier

three surveys. This category included about one-third (36%) specifically mentioning Badgerys Creek, with other details surrounding the development continuing to be relatively low (Figure 17). Some detail about infrastructure and development was mentioned by around one-third (31%) of the residents, similar to February-March 2018 (29%), and marginally higher than in May-June 2017 (24%) and September-October 2017 (19%)—including a general reference to infrastructure being developed (12%), that roads would be upgraded in the surrounding area (10%), and the potential expansion of a rail network to the airport (10%). As in February-March 2018, there was very low specific mention of the developer (Government/Sydney Airport) (1%) compared with the May-June 2017 benchmark (10%). More than one in ten (13%) mentioned a top-of-mind concern or negative aspect of the development.

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



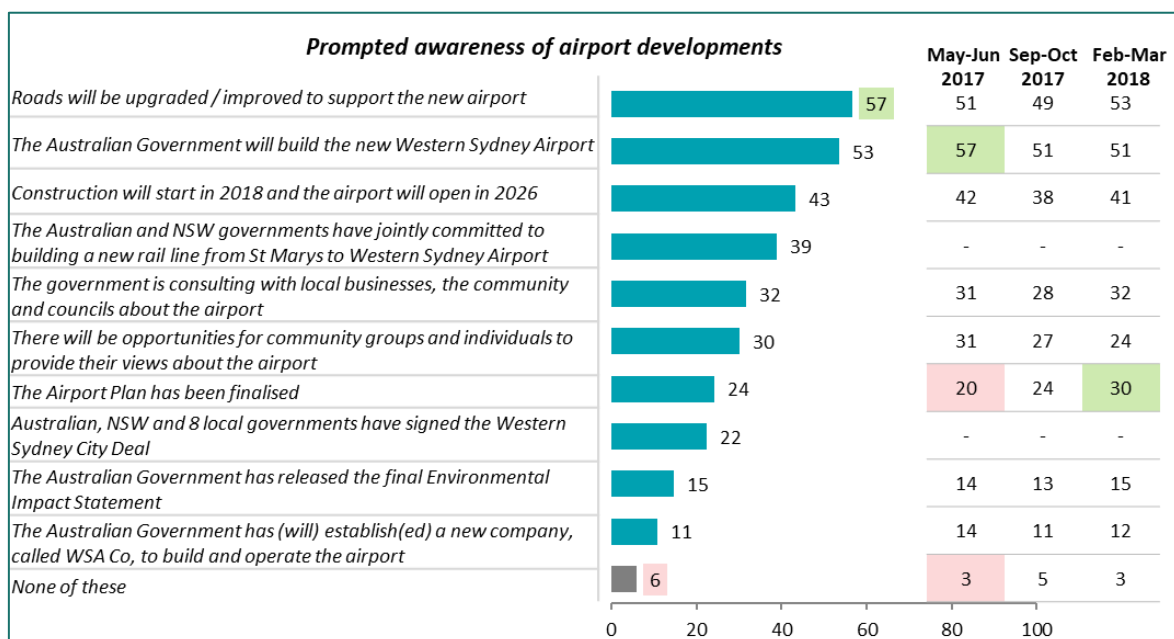
Q2. What have you seen, heard or read about the development of a new major airport in Sydney?

Base: Those who have seen, heard or read anything about the development of a new major airport in Sydney (n=827)

When prompted with particular aspects of the new major airport in Sydney, around half (53%) indicated they were aware that the Australian Government would be building the new airport, marginally lower than in the May-June 2017 benchmark (57%) and at a similar level across the regions (a range of 52% to 55%) (Table 20). In May-June 2018 over half (57%) were aware that roads would be upgraded to support the new airport, with a trend for highest awareness in South West region (66%) and lowest awareness in Inner West region (48%).

Awareness of the construction and opening dates in May-June 2018 (43%) had also remained relatively stable (a range of 38% to 42% in the earlier three surveys).

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



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=827)

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	May-Jun 2018				REGION											
					Statistically significant change from May-Jun 17 (BW) / Sep-Oct 17 (W2) / Feb-Mar 18 (W3)											
	South West	Inner West	North West	West Central	South West			Inner West			North West			West Central		
	%	%	%	%	BW %	W2 %	W3 %	BW %	W2 %	W3 %	BW %	W2 %	W3 %	BW %	W2 %	W3 %
Roads will be upgraded / improved to support the new airport	66	48	57	55	No changes	No changes	No changes	No changes	No changes	No changes	-	-	-			
The Australian Government will build the new Western Sydney Airport	52	53	55	53							-	-	-			
Construction will start in 2018 and the airport will open in 2026	48	40	43	42							-	-	-			
The Australian and NSW governments have jointly committed to building a new rail line from St Marys to Western Sydney Airport	35	39	41	39							-	-	-			
The government is consulting with local businesses, the community and councils about the airport	33	30	31	32							-	-	-			
There will be opportunities for community groups and individuals to provide their views about the airport	33	31	30	29							-	-	-			
The Airport Plan has been finalised	28	19	24	24							-	-	-15			
Australian, NSW and 8 local governments have signed the Western Sydney City Deal	22	22	22	23							-	-	-			
The Australian Government has released the final Environmental Impact Statement	15	16	13	15							-	-	-			
The Australian Government has (will) establish(ed) a new company, called WSA Co, to build and operate the airport	11	8	12	11							-	-	-			
Sample size	192	173	236	226												
Highlighting statistically significantly higher and lower results:	between regions in May-Jun 2018				comparing each region with May-Jun 2017 / Sep-Oct 2017 / Feb-Mar 2018											

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=827)

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) had been finalised (30%, up from 20% in May-June 2017). This awareness had not been as well maintained into May-June 2018 (24%). The fluctuations were related primarily to reported awareness in South West and West Central regions.

Two new developments were included in the May-June 2018 survey:

- 'the Australian and NSW governments have jointly committed to building a new rail line from St Marys to Western Sydney Airport': 39% reporting awareness
- 'Australian, NSW and 8 local governments have signed the Western Sydney City Deal': 22% reporting awareness.

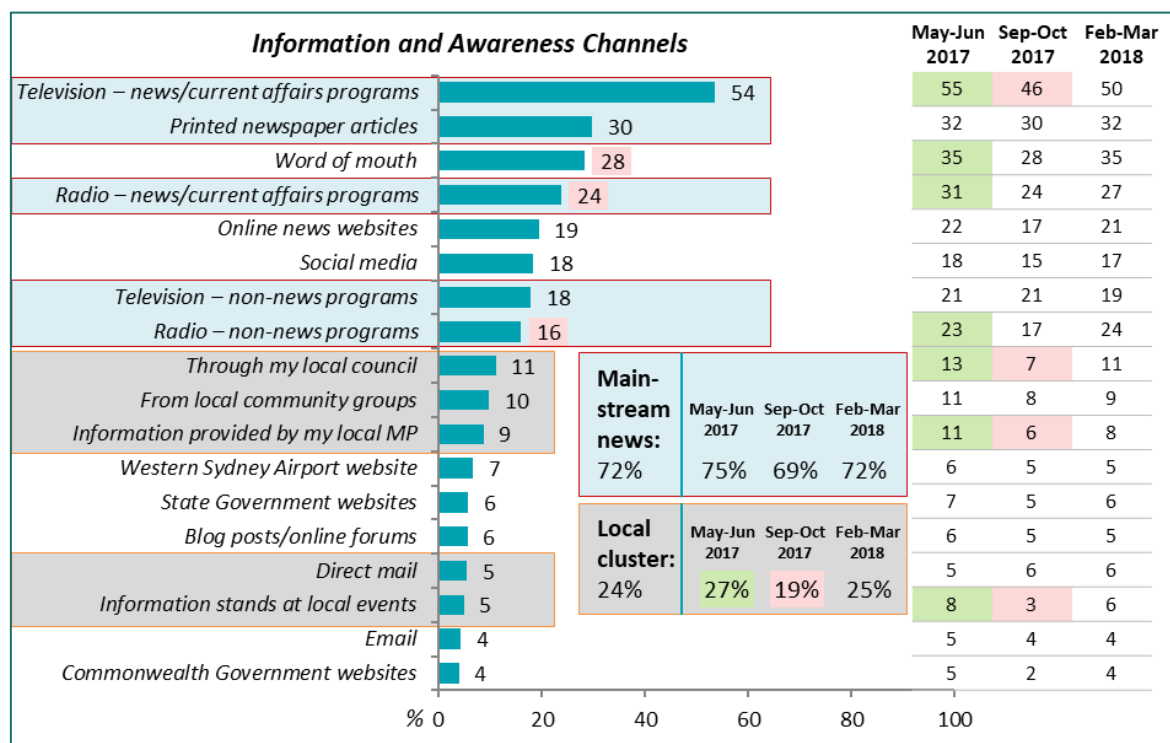
Residents continued to be much less aware that the Environmental Impact Statement had been released (15%), or that the Australian Government has established a new company, called WSA Co, to build and operate the airport (11%).

Looking at awareness in the regions in May-June 2018 showed no other substantial differences (Table 20).

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. The most common individual channel in May-June 2018 was, again, television news/current affairs, nominated by over half (54%) of this group of residents (Figure 19).

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



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=827)

Highlighting statistically significantly higher and lower results between waves

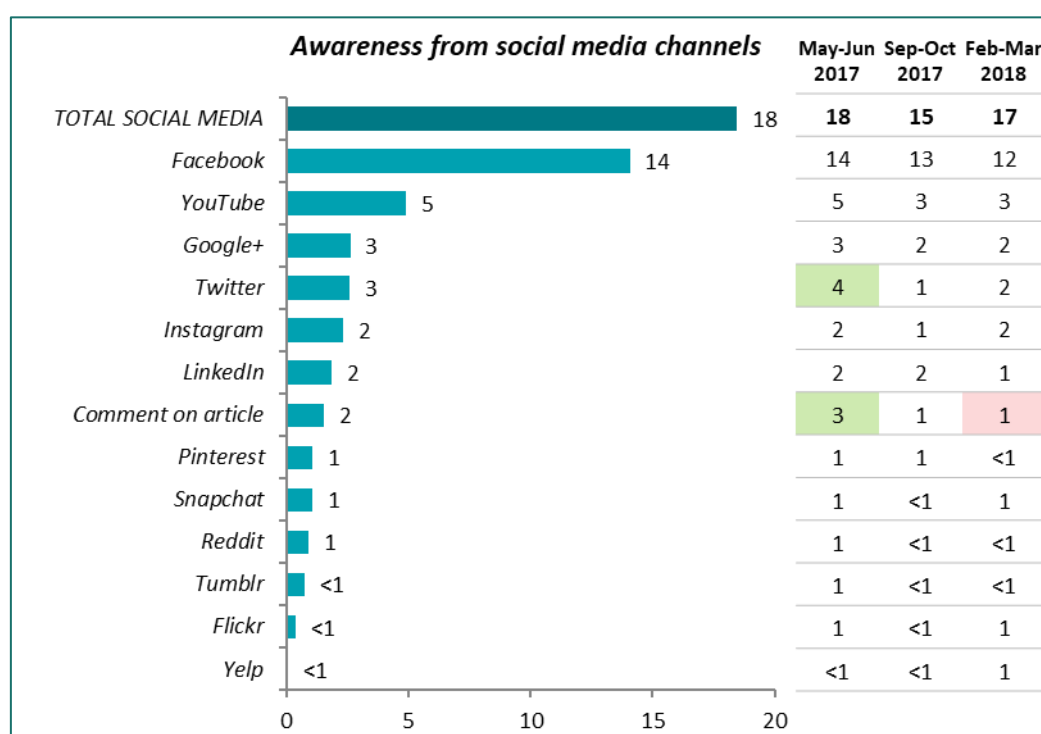
Other channels reported by more than one-fifth (20%) of the group included two other mainstream news sources—printed newspaper articles (30%) and radio news/current affairs (24%)— and ‘word of mouth’ (28%). Overall, mainstream news channels were nominated by over two-thirds (72% reporting any), similar to the previous three surveys (a range of 69% to 75%). The cluster of local channels (24% reporting any) maintained a similar level to February-March 2018 (25%) after some decrease in September-October 2017 (19%). Nomination in May-June 2018 of either a Commonwealth Government website or the Western Sydney Airport website remained relatively low (9%).

Nominations of several channels in May-June 2018 were below the levels achieved in the May-June 2017 benchmark, and including two also tending to be lower than in February-March 2018 (Figure 19):

- word of mouth (28% vs. 35% in both May-June 2017 and February-March 2018)
- radio – news/current affairs (24% vs. 31% in May-June 2017)
- radio – non-news programs (16% vs. 23% in May-June 2017 and 24% February-March 2018).

A minority (18%) of residents aware of the new airport had been exposed to information on a social media site, similar to the previous three surveys in 2017 and 2018 (15–18%) (Figure 20). Facebook (14% of those aware) was again most prominent, similar to the earlier surveys (12–14%).

Figure 20: Social media channel sources of posts about the new Western Sydney Airport (May-Jun 2018)



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

Key differences between demographic groups in May-June 2018 were (Table 21):

- access through **traditional television, radio and newspaper channels** increased with age
- access through **social media** decreased with age
- 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, and higher among residents in South West and North West regions.

Table 21: Channels of awareness of the development of a new major airport, by demographics (May-Jun 2018)

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	54	52	56	31	55	75	49	50	56	55	51	55
Printed newspaper articles	30	30	29	12	27	51	30	32	31	28	23	33
Radio – news/current affairs programs	24	27	21	16	20	36	22	26	28	20	20	26
Online news websites	19	26	13	23	20	14	15	21	21	20	22	18
Television – non-news programs	18	19	17	17	15	22	21	14	16	19	17	18
Radio – non-news programs	16	19	13	10	15	24	16	14	17	16	13	17
Other channels - 15+% awareness												
Word of mouth	28	27	30	29	31	25	31	29	28	28	27	29
'Local Cluster' (any in category)	24	24	24	25	25	22	32	10	30	19	24	23
Social media	18	21	16	28	18	9	16	15	22	18	25	16
Sample size	827	415	412	238	259	330	192	173	236	226	214	603

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=827)

Highlighting statistically significantly **higher** and **lower** results between groups

Differences between the regions in May-June 2018 in nominating several specific local sources were for lowest nomination in Inner West region, and a mix of higher nomination in South West and/or North West regions:

- **local council** was most likely to be nominated in both South West and North West regions
- **local community group** was most likely to be nominated in North West region
- **local MP** was most likely to be nominated in South West region

There were few differences in channel nomination in the regions in May-June 2018 compared with the earlier three surveys (Table 22). Compared with the May-June 2017 benchmark:

- residents in South West region were less to nominate **radio news/current affairs**
- residents in North West region were less likely to nominate **local MP** and **information stands at local events**.

Nomination of 'word of mouth' had earlier been higher in South West region, likely to have reflected local discussion given that the airport is being built in that region, but in May-June 2018 was at a similar level to the other regions.

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

Channels	May-Jun 2018				REGION											
	South West	Inner West	North West	West Central	Statistically significant change from May-Jun 17 (BW) / Sep-Oct 17 (W2) / Feb-Mar 18 (W3)											
					South West			Inner West			North West			West Central		
	%	%	%	%	BW %	W2 %	W3 %	BW %	W2 %	W3 %	BW %	W2 %	W3 %	BW %	W2 %	W3 %
Television – news/current affairs programs	49	50	56	55	-	-	-	No changes	-	-	-	No changes	-	-	-	
Printed newspaper articles	30	32	31	28	-	-	-		-	-	-					
Word of mouth	31	29	28	28	-	-	-		-	-	-					
Radio – news/current affairs programs	22	26	28	20	-13	-	-		-	-	-					
Online news websites	15	21	21	20	-	-	-		-	-	-					
Social media	16	15	22	18	-	-	-		-	-	-					
Television – non-news programs	21	14	16	19	-	-	-		-	-	-					
Radio – non-news programs	16	14	17	16	-	-	-		-	-	-					
Through my local council	17	3	15	8	-	-	-		-	-	-					
From local community groups	10	4	14	8	-	-	-		-	-	-					
Information provided by my local MP	16	3	7	8	-	-	-		-11	-	-					
Western Sydney Airport website	5	6	6	8	-	-	-		-	-	-					
State Government websites	7	6	4	7	-	-	-		-	-	-					
Blog posts/online forums	2	8	6	7	-	-	-		-	-	-					
Direct mail	9	2	8	3	-	-	-		-	-	-					
Information stands at local events	6	1	5	6	-	-	-		-8	-	-					
Email	6	1	6	4	-	-	-	-	-	-						
Commonwealth Government websites	1	3	4	6	-	-	-	-	-	-						
Sample size	192	173	236	226												
Highlighting statistically significantly higher and lower results:	between regions in May-Jun 2018				comparing each region with May-Jun 2017 / Sep-Oct 2017 / Feb-Mar 2018											

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=827)

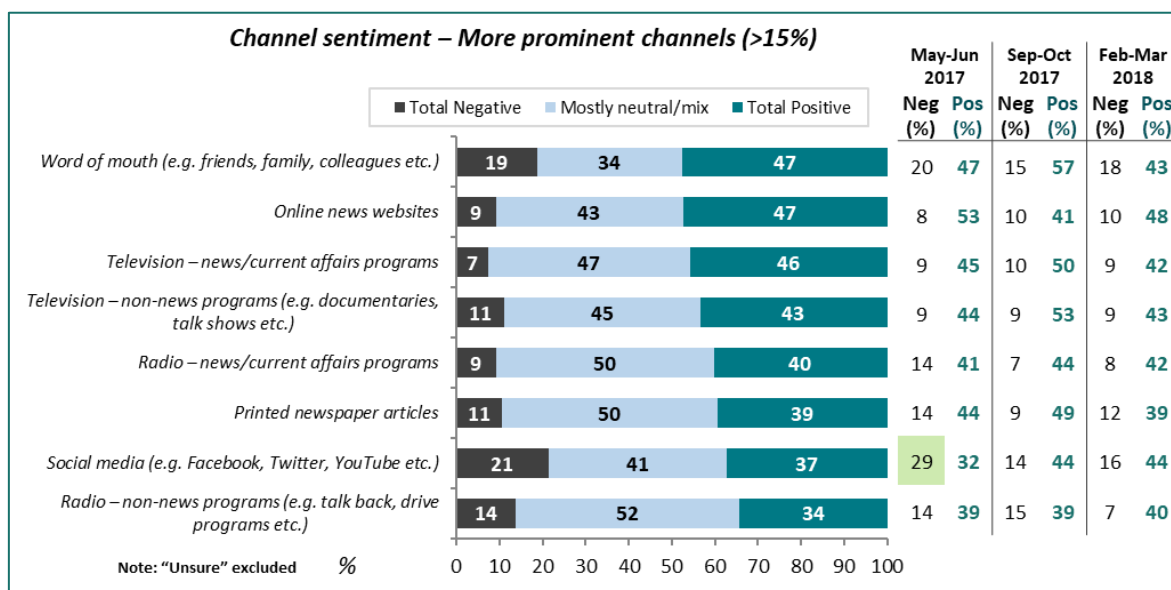
Showing main channels and lower incidence channels where changes occurred

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 May-June 2018 (nominated by over 15%), the share of positive sentiment was in a relatively narrow range of 34% to 47% (Figure 21). Negative sentiment was of a smaller share, in the range of 7% to 21%.

Overall, 'word of mouth' (47%), 'online news websites' (47%) and 'television news/current affairs' (46%) were the channels most likely to be rated positively (Figure 21). 'Word of mouth' (19%), however, along with social media (21%), had the highest negative incidence. Negative sentiment of content for social media had reduced from May-June 2017 (29%), although was now marginally higher than in the intervening two surveys (14–16%).

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



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.

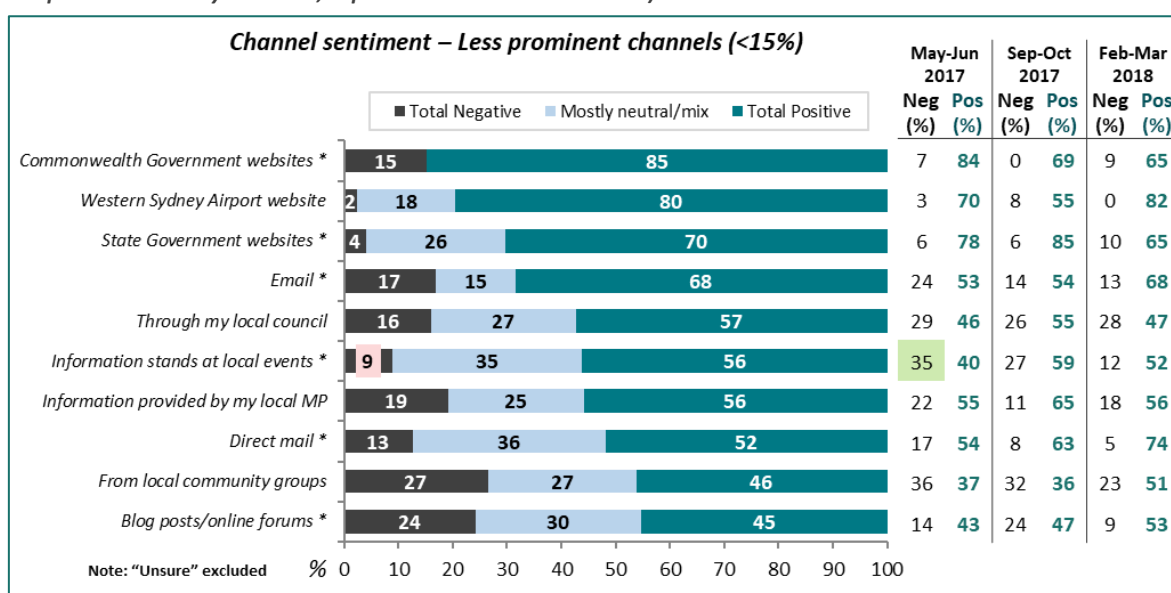
Base: Those who had seen, heard or read anything via the respective channel (n=121-418)

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

Figure 22 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.

Of sources with higher usage, 'Western Sydney Airport website' (80%) had the highest positive sentiment, with positive sentiment at around 50% for the other three local sources: 'local council' (57%), 'information provided by local MP' (56%), and 'local community groups' (46%). 'Local community groups' was most polarised, with higher negative sentiment (27%).

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



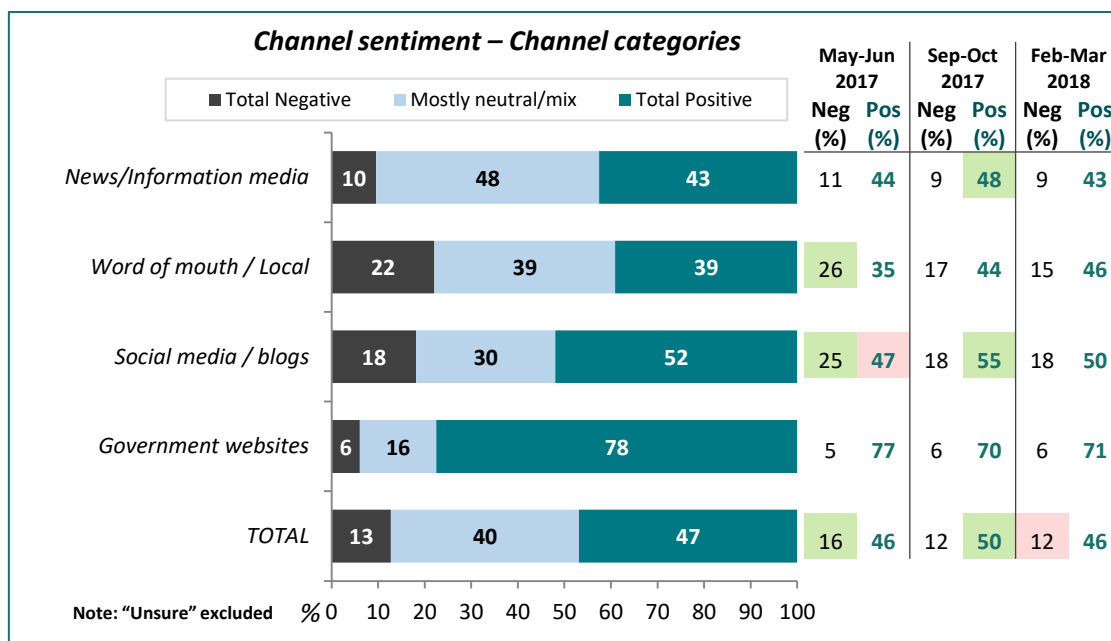
Q5. Thinking about the last three months, please select overall how positive or negative the content in the source below has been regarding the development of a new major airport in Sydney.

Base: Those who had seen, heard or read anything via the respective channel (n=31-87)

* Sample size less than 50

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



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 (May-Jun 2018: n=150-1450 ratings)

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

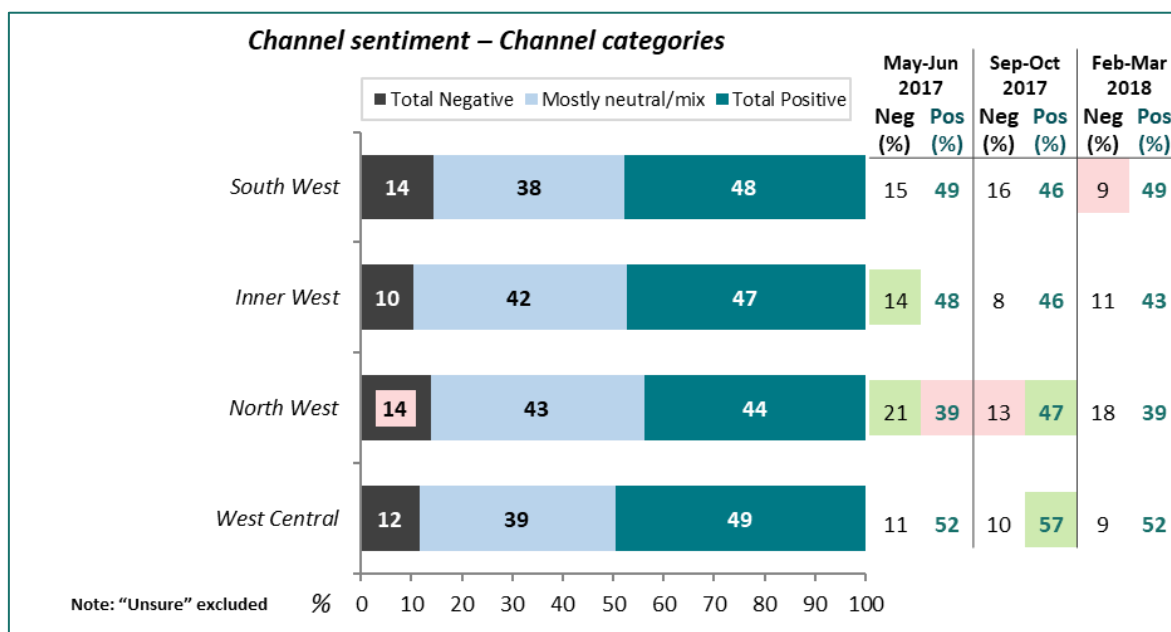
In May-June 2018, about half (47%) of the information sources had positive average sentiment, with a small minority (13%) negative, maintaining a lower level compared with the May-June 2017 benchmark (Figure 23). The results were broadly similar to previous three surveys, but with positive sentiment being highest (50%) in September-October 2017. ‘News/information media’, having the greatest incidence of use, reflected this overall pattern.

‘Government websites’ continued to have the highest positive sentiment (75%) as well as the lowest negative sentiment (6%).

Both ‘word of mouth/local’ and ‘social media/blogs’ channel categories continued to have more distributed sentiment profile, with a relatively higher negative incidence (22% and 18% respectively). Positive sentiment was stronger for ‘social media/blogs’ (52%). ‘Word of mouth/local’ (39%) had shown some reduction compared with September-October 2017 (44%) and February-March 2018 (46%), although still higher than the May-June 2017 benchmark (26%).

Looking at the overall weighted profile of ratings across the region showed relatively similar profiles in May-June 2018, with the share of positive sentiment over a narrow range (44–49%), and a similar profile also for negative sentiment (10–14%) (Figure 24). This greater uniformity resulted from some increase in the negative share compared with February-March 2018 (from 9% to 14%) and some decrease in North West region (from 18% to 14%); with the latter particularly lower than in the May-June 2017 benchmark (21%).

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



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.

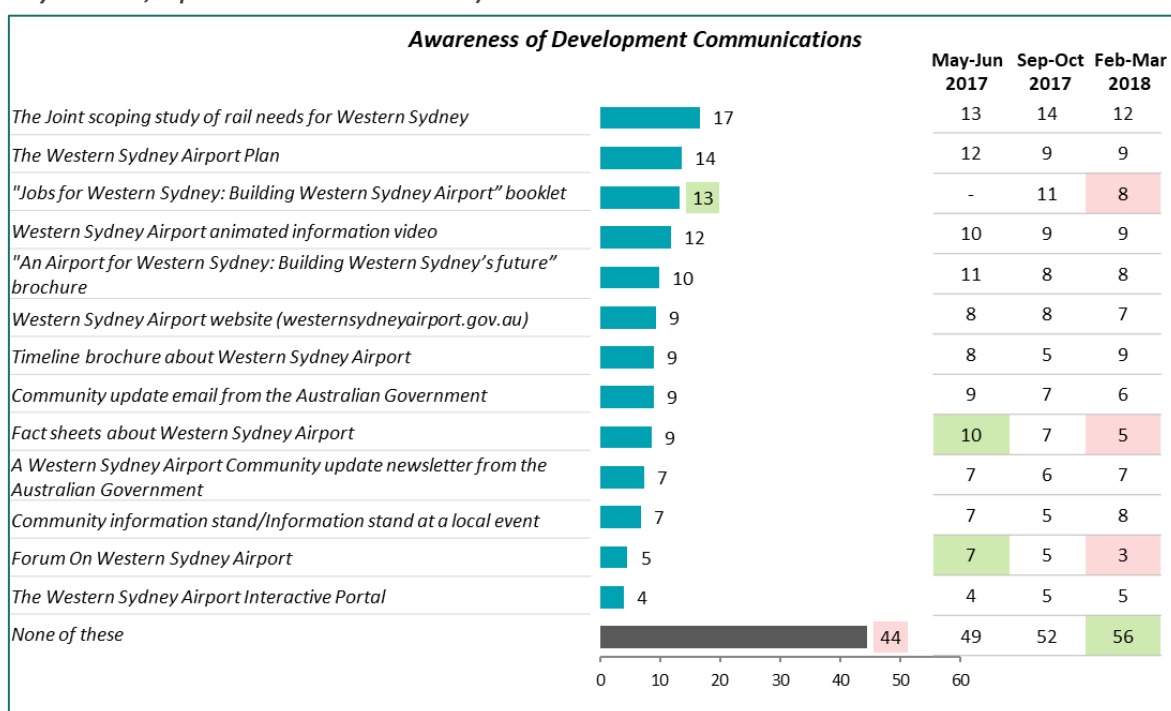
Base: Those who had seen, heard or read anything – ratings of all channels (May-Jun 2018: n=354-439 ratings)

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.

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



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: seen, heard or read anything about the development of a new major airport in Sydney (n=827)

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 May-June 2018 was in the range of 4% to 17%, with the highest result continuing to be for the 'Joint scoping study of rail needs for Western Sydney' (17%) (Figure 25).

There had been a decline in awareness of several items in February-March 2018 compared with the May-June 2017 benchmark. Awareness in May-June 2018 increased on these items, to be at least similar to the benchmark on all items. Overall, more residents in May-June 2018 nominated at least one of the items (56% vs. 44-51% in the earlier surveys).

The only significant differences between the regions in May-June 2018 in awareness of the initiatives and communications was for residents in Inner West region to be least likely to report (Table 23):

- awareness of any of the items (63% vs. 40–48%), similar to the previous surveys
- awareness of 'A Western Sydney Airport Community update newsletter from the Australian Government' (1% vs. 8–9% in the other regions).

Table 23: Awareness of initiatives and communications from the Australian Government, by region (May-Jun 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>	17	15	12	14	22
<i>The Western Sydney Airport Plan</i>	14	15	14	11	16
<i>Jobs for Western Sydney: Building Western Sydney Airport" booklet</i>	13	11	9	13	17
<i>Western Sydney Airport animated information video</i>	12	12	7	14	12
<i>An Airport for Western Sydney: Building Western Sydney's future" brochure</i>	10	6	8	11	11
<i>Western Sydney Airport website (westernsydneyairport.gov.au)</i>	9	6	8	13	8
<i>Timeline brochure about the Western Sydney Airport</i>	9	4	9	11	9
<i>Community update email from the Australian Government</i>	9	8	5	10	10
<i>Fact sheets about the Western Sydney Airport</i>	9	9	4	12	7
<i>A Western Sydney Airport Community update newsletter from the Australian Government</i>	7	9	1	8	9
<i>Community information stand/Information stand at a local event</i>	7	7	5	8	6
<i>Forum on Western Sydney Airport</i>	5	2	5	4	6
<i>The Western Sydney Airport Interactive Portal</i>	4	3	2	6	3
NONE OF THESE	44	48	63	40	40
<i>Sample size</i>	<i>827</i>	<i>192</i>	<i>173</i>	<i>236</i>	<i>226</i>

Base: Those who have seen, heard or read anything about the development of a new major airport in Sydney (n=827)

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

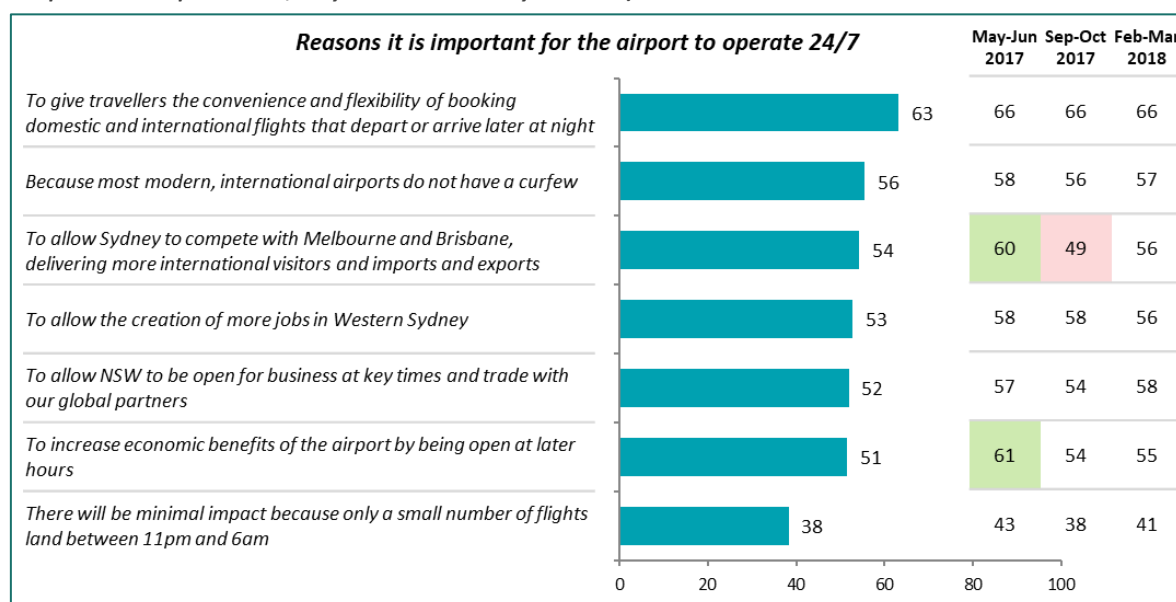
5.5. Reasons for Operating 24 Hours a Day, 7 Days a Week

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 and May-June 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. Around two-thirds (63%) 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 half or more of this group (a range of 51% to 58%) (Figure 26). Only the statement about minimal impact at night was nominated again by less than half of the group (38%).

The results in May-June 2018 were at least marginally lower than the May-June 2017 benchmark for all of the reasons presented. The main differences were for agreement with:

- increasing economic benefits of the airport (51% in May-June 2018 vs. 61% in May-June 2017)
- allowing Sydney to compete with Melbourne and Brisbane (54% vs. 60%).

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



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=424)

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 did not provide a large sample size for each region, the reasons nominated within each region were averaged over the February-March 2018 and May-June 2018 surveys to give more stable results for comparison (Table 24). The results continued to be mostly uniform across the regions, with the main trend again a lower nomination of job creation in Western Sydney by residents in Inner West region (46% vs. 53% to 58%), 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 for their rating. The reasons again fell into four main categories, which were similarly nominated in all three surveys in the current series (Figure 27). In May-June 2018:

- over two-fifths (44%) of this group of residents nominated a **concern about noise**, including around one-quarter (27%) saying that it would create too much noise generally
- close to half (48%) mentioned a reason on **not being necessary** to operate without a curfew, mostly making reference to some aspect of Sydney Airport
- over one-third (39%) referred to a **negative impact** or **being unfair** on the community
- the smallest topic area (9%) 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 Feb-Mar 2018 and May-Jun 2018)

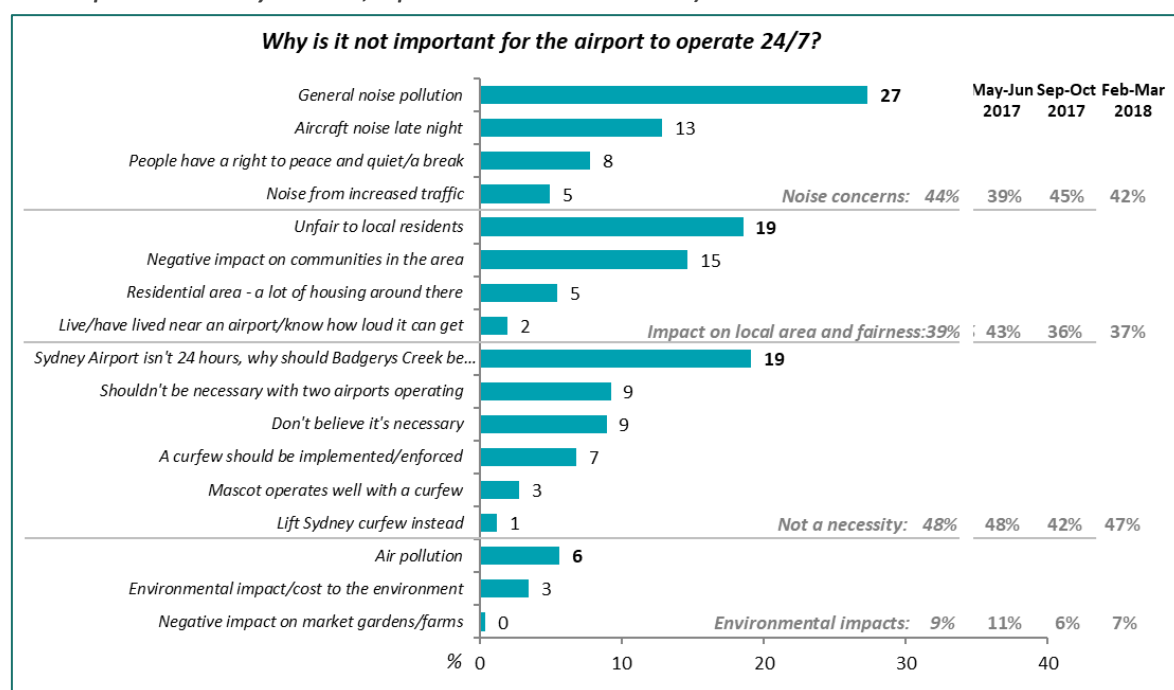
Heard of developments	Average of Feb-Mar 2018 and May-June 2018			
	South West	Inner West	North West	West Central
	%	%	%	%
To give travellers the convenience and flexibility of booking domestic and international flights that depart or arrive later at night	62	64	68	63
Because most modern, international airports do not have a curfew	57	52	55	58
To allow Sydney to compete with Melbourne and Brisbane, delivering more international visitors and imports and exports	56	53	56	54
To allow the creation of more jobs in Western Sydney	58	46	53	56
To allow NSW to be open for business at key times and trade with our global partners	56	51	54	54
To increase economic benefits of the airport by being open at later hours	49	53	49	57
There will be minimal impact because only a small number of flights land between 11pm and 6am	43	39	33	43
Sample size	153	168	179	203

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 2018 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, Sep-Oct 2017 and Feb-Mar 2018)



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=276)

5.6. Rail Link

In May-June 2018, residents were provided background information that:

*The Australian and NSW governments have jointly committed to the first stage of a new **North South Rail Link** from St Marys to Western Sydney Airport and the future Badgerys Creek Aerotropolis, a future development area near the airport*

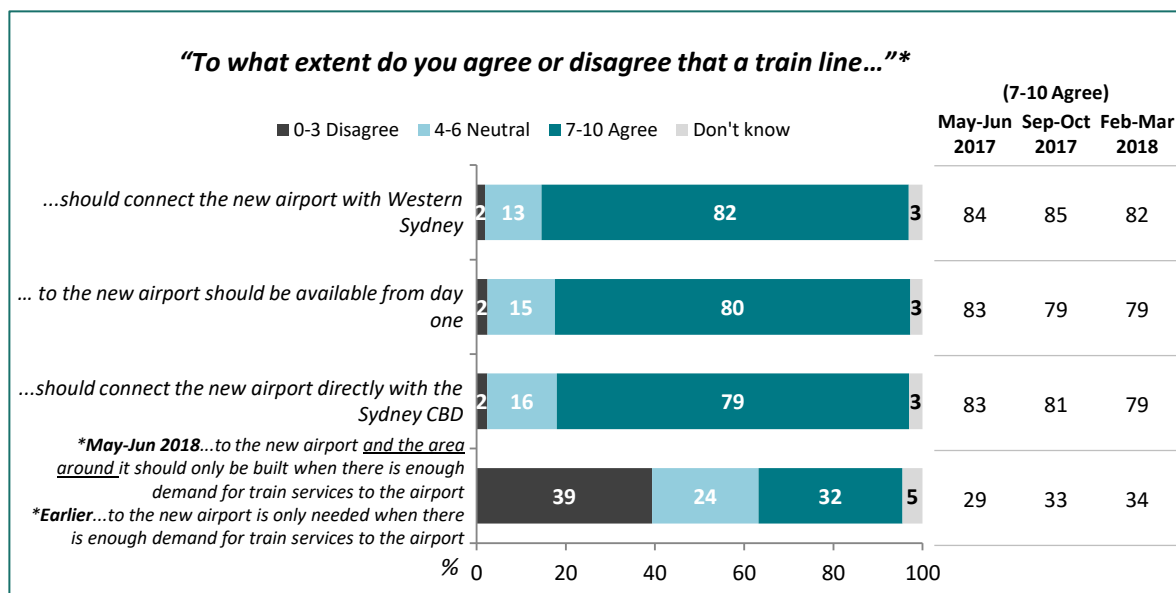
In the earlier surveys, the information referred to the *joint scoping study into the rail needs to determine the aspects of building a rail link to the new airport*.

Residents were then asked if they agreed or disagreed with four statements. There continued in May-June 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 (80%).

Each of these statements had very low proportions (2%) of residents disagreeing (rating 0-3). Compared with these statements, there was less agreement (32%) that a train line to the new airport and the area around it should only be built *when there is enough demand* for train services to the airport.⁵ This statement, being less definitive and specific in nature, was met with a more balanced set of responses. Around two-fifths (39%) 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 (May-Jun 2018, and comparison with May-Jun 2017, Sep-Oct 2017 and Feb-Mar 2018)*



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?

*Different wording of the last statement in May-June 2018, extending to 'and the area around'

Base: All (May-Jun 18, n=903; Feb-Mar 18, n=613; Sep-Oct 17, n=615; May-Jun 17, n=1,244)

⁵ The statement had been previously '...a train line to the new airport is only needed when there is enough demand for train services to the airport'.

There were no strong differences between the regions in May-June 2018 in agreement with the statements about the rail link (Table 25). There had been an increase in agreement in May-June 2018 in Inner West region about 'availability from day one', but agreement had reverted to earlier levels in May-June 2018.

There was a trend in May-June 2018 for residents in South West region to be least likely to agree that the rail link should only be built when there is enough demand (26% vs. 32-35% in the other regions).

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

Agreement: A train line ...	May-Jun 2018				REGION											
					Statistically significant change from May-Jun 17 (BW) / Sep-Oct 17 (W2) / Feb-Mar 18 (W3)											
	South West	Inner West	North West	West Central	South West			Inner West			North West			West Central		
Rated 7-10	%	%	%	%	BW %	W2 %	W3 %	BW %	W2 %	W3 %	BW %	W2 %	W3 %	BW %	W2 %	W3 %
... should connect the new airport with Western Sydney	83	85	82	82	No changes			-	-	-	No changes			No changes		
... to the new airport should be available from day one	79	78	81	79				-	-12	-						
... should connect the new airport directly with the Sydney CBD	80	84	77	78				-	-	-						
* May-June 2018 ... to the new airport <u>and the area around it</u> should only be built when there is enough demand for train services to the airport to the new airport * Earlier ... is only needed when there is enough demand for train services to the airport	26	33	32	35				-	-	-						
Sample size	202	200	251	250												
Highlighting statistically significantly higher and lower results:	between regions in May-Jun 2018				comparing each region with May-Jun 2017 / Sep-Oct 2017 / Feb-Mar 2018											

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 (May-Jun 18, n=903; Feb-Mar 18, n=613; Sep-Oct 17, n=615; May-Jun 17, n=1,244)

6 Key Findings

6.1. Awareness of Western Sydney Airport

In May-June 2018, a large majority (91%) of Western Sydney residents had seen or heard at least something about the development of a new major airport, including half (50%) 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 the announcement in the Federal Budget; and which followed a small decline in September-October 2017 (42%) which occurred particularly in South West and North West regions. This level of awareness was more likely to be reported by residents aged 55 years and over (57%), and least likely to be reported by residents in Inner West region (41%).

Similar to earlier surveys, residents were more likely to mention that they knew the airport was being constructed at Badgerys Creek than any other topic. When prompted, the majority of those aware of the airport had heard that roads will be upgraded/improved to support the new airport (57%), which had increased marginally from the May-June 2017 benchmark (51%); and that the Australian Government is building the airport (53%), continuing a small decrease from the benchmark (57%).

Key channels in September-October 2017 that were reported as sources of information about the airport were mainstream media, including television news/current affairs programs (54%), printed newspaper articles (30%), and radio news/current affairs programs (24%); and 'word of mouth' (28%). Social media was mentioned by around one-fifth (18%), primarily Facebook. The Western Sydney Airport website was again nominated by less than one in ten (7%). Nominations of several channels in May-June 2018 were below the levels achieved in the May-June 2017 benchmark, including word of mouth, radio-news/current affairs and radio-non-news programs.

The results suggest that ongoing coverage of further development of the airport has influenced an improvement in overall awareness in May-June 2018, particularly in South West region and North West region. Awareness has not been as well maintained in Inner West region.

6.2. Key Measures of Community Sentiment

In May-June 2018 over half of surveyed residents of Western Sydney expressed positive sentiment towards the airport on key measures of *favourability* (61% agreeing) and *positive benefits outweighing any negative impact* (58% agreeing); with around one in ten holding a negative position on each. One-third (35%) expressed *concern about a negative impact* of building the airport, while around two-fifths (42%) agreed with the *importance of 24/7 operation*.

Favourability

Three-fifths (61%) of Western Sydney residents surveyed in May-June 2018 were favourable to the new airport at Badgerys Creek, similar to February-March 2018 (60%). This result was below the peak in agreement seen in May-June 2017 (67%), but was maintained above results in 2016 when less than three-fifths agreed (56-57%). Positive sentiment in May-June 2018 was similar across the regions (58-63%). However, residents in South West region were the most likely to disagree (17%), with Inner West (6%) and West Central (5%) less likely.

The greatest favourability in May-June 2018 was among male residents, and residents in the age groups 35-54 years and 55 years and over.

Agreement with the benefits of Western Sydney Airport were found to be drivers of favourability towards the airport and shifts in favourability were accompanied by similar trends in agreement with several benefits.

The incidence of those unsure of their favourability remained relatively low in May-June 2018 (3%) compared with surveys across 2016 (ranging from 6% to 8%). Some of the relative increase in favourability since 2016 may have come from those that were previously less aware.

There has been a pattern for knowledge of the airport to be lower among residents *neutral* about favourability (34% reporting knowing 'quite a lot'/'a great deal'), compared with residents expressing *high* favourability (57%) or *low* favourability (62%). This pattern suggests that increasing knowledge of the airport particularly among neutral residents can lead to polarising perceptions.

Positive benefits

Over half (58%) of Western Sydney residents surveyed in May-June 2018 agreed that the positive benefits of the airport will outweigh any negative impacts. This result was only marginally below the average of May-June 2017 and September-October 2017 (61%), but maintained an increase in favour compared with December 2016 (49%).

Positive sentiment had increased substantially from December 2016 to September-October 2017 in both South West region (from 44% to 68%) and West Central region (from 45% to 57%) but has not been well maintained into 2018 (55% and 59% respectively in May-June 2018).

Agreement was measured at a similar level across the regions in May-June 2018 (54-59%), similar to February-March 2018. Greater agreement in May-June 2018 was among male residents (65%), and residents in the age groups 35-54 years (62%) and 55 years and over (52%).

Concern about negative impact

In May-June 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, with around one-third (35%) agreeing and less than one-third disagreeing (28%). These results were similar across all four regions.

The level of agreement represented an increasing trend following a lower level of concern in May-June 2017 (30%). This trend was largely a result of a decline compared with December 2016 in South West and North West regions, with the result in May-June 2018 returning to the level seen across 2015-2016 (averaging 36%). In particular, the level of agreement in South West region (40%) had increased back to the level seen in December 2016 (42%), and concern also showed an increasing trend from May-June 2017 in West Central region (from 28% to 37%).

Disagreement with concern about a negative impact was lower among female residents (24% vs. 33% for males) and lowest among residents aged 18-24 years (18%, increasing with age to be highest among residents aged 55 years and over at 41%).

Importance of 24/7 operation

Agreement with the *importance of 24/7 operation* in May-June 2018 (42%) was similar to February-March 2018 (40%) maintaining a lower result from the average of the earlier two surveys conducted in May-June 2017 and September-October 2017 (46%), and below the average of the earlier

surveys conducted from 2015 (47%). One-quarter (25%) of residents disagreed with the importance of 24/7 operation, and one-third (33%) were neutral or unsure of its importance.

Disagreement in May-June 2018 was higher among older residents (38% for those aged 55 years and over, decreasing to 16% for those aged 18-34 years); female residents (30% vs. 19% for males); and residents not identifying with a culturally and linguistically diverse background (29% vs. 15% for those identifying). There was more uniformity between regions (20–28%) compared with February-March 2018 when disagreement was highest in North West region (40% vs. 24-31% in the other three regions).

6.3. Perceived Barriers and Motivators

While the majority of residents in May-June 2018 continued to have a positive overall perception that benefits of the airport outweigh any negative impacts, there continue to be areas of concern to residents. This situation indicates an opportunity to provide more education and evidence about the benefits and information on how areas of concern are being addressed.

Concerns

Important areas of concern among Western Sydney residents continued to focus on traffic, noise and environmental impacts. Similar to the earlier surveys, over half of residents surveyed in May-June 2018 expressed concern about:

- increase in traffic both during construction (58%) and once running (55%)
- general noise pollution once running (57%)
- noise late at night and early in the morning if the airport operates 24 hours a day (56%).

These levels of concern have remained similar through the surveys in 2107 and 2018.

Benefits

Three-fifths or more of residents surveyed in May-June 2018 viewed economic gains for the area and Sydney's global competitiveness as key benefits of the airport. The declines in February-March 2018 for three of these benefits, compared with the May-June 2017 benchmark, showed some recovery in May-June 2018. Key benefits in May-June 2018 were that the airport:

- will bring jobs to the region (72% in May-June 2018, down from 79% in May-June 2017)
 - declining significantly in South West region (68% in May-June 2018, down from 81% in May-June 2017)
- is needed to support the current airport at Mascot (68% in May-June 2018, similar to 71% in May-June 2017)
- is necessary to maintain and grow Sydney's global competitiveness (67% in May-June 2018, similar to 68% in May-June 2017)
- will boost business and tourism in Western Sydney (66% in May-June 2018, marginally lower than 72% in May-June 2017)
- is necessary to support Western Sydney's growing population and economy (62% in May-June 2018, marginally lower than 67% in May-June 2017).

Relationships with favourability of the airport

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 May-June 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 (80%)
- linked to Western Sydney suburbs (82%)
- linked to the Sydney CBD (79%).

There was some acknowledgement that the rail link should be based on demand for services (32% agreeing), although two-fifths disagreed, indicating a large minority more strongly considering 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.

6.4. Informing the Community

The majority (56%) of Western Sydney residents in May-June 2018 continued to see it as important to be informed about progress of Western Sydney Airport, with less than one in ten (8%) considering it of low importance. Consideration of importance in May-June 2018 as lowest in Inner West region (47%).

Among residents in the current survey perceiving some importance of being kept informed, the top four preferred unpaid channels in May-June 2018 for information about the airport's development, included media coverage (nominated by 58%), a website dedicated to the airport (41%), local council (34%) and state government websites (32%).

There had been a decline in nomination of several sources in September-October 2017 following the May-June 2017 benchmark, but results in May-June 2018 (as in February-March 2018) were at similar levels to the benchmark, possibly related to increased interest and attention as the airport development progresses.

While there is a moderately strong interest for a dedicated website (41%), the incidence of residents reporting having used the existing website as a source of information was low (7%).

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%