



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



Department of Infrastructure and Regional Development

***Western Sydney Airport Evaluation Research
September–October 2017 Survey***

Final Report

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1 Executive Summary

1.1. Background

The Communications and Stakeholder Engagement Section within the Western Sydney Unit (WSU) in the Department of Infrastructure and Regional Development is responsible for implementing the Western Sydney Airport Project Communications and Stakeholder Engagement Strategy (the Strategy). With the determination of the Western Sydney Airport Plan and the announcement that the Australian Government will deliver and invest in the Western Sydney Airport (the airport), as in the previous phase, WSU's communications tasks will continue to be guided by the Strategy.

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

1.2. Research Objectives

Key objectives for the survey research were to:

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

1.3. Research Method

Survey research had been conducted over the period November 2014 to December 2016 to track awareness of and sentiment towards the Western Sydney Airport, among residents of Western Sydney. A new survey series was launched in May-June 2017 to continue the tracking process. The May-June 2017 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 survey in the new series was conducted in September-October 2017, with a sample of 615 residents.

For the new survey series, 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 September-October 2017 survey wave, and tracking of measures.

1.4. Key Findings

Awareness of Western Sydney Airport

In September-October 2017, a large majority (89%) of Western Sydney residents had seen or heard something about the development of a new major airport, with around two-fifths (42%) saying they had heard 'quite a lot' or 'a great deal' about it. The latter figure was lower than in the benchmark survey in May-June 2017 (48%), declining in particular in South West region and North West region. This level of awareness was more likely to be reported by residents aged 55 years and over.

A key topic mentioned spontaneously as being seen or heard about the airport was confirmation of construction, particularly the location at Badgerys Creek, similar to the earlier survey. When prompted, the majority of those aware of the airport had heard that the site is in Western Sydney (73%); that the Australian Government is building the airport (51%), with some decrease from the benchmark (57%); and that roads will be improved to support the new airport (49%).

Key channels in September-October 2017 reported as sources of information about the airport were mainstream media, including television news/current affairs programs (46%), printed newspaper articles (30%), word of mouth (28%) and radio news/current affairs programs (24%). Of these sources, all but newspapers showed a reduction of seven to nine percentage points compared with the May-June 2017 benchmark following announcement of the airport development. Social media was mentioned by 15%, primarily Facebook. The Western Sydney Airport website was again nominated by less than one in ten (5%).

The pattern for an overall decrease in awareness can be influenced by genuine 'forgetting' of a topic several months after exposure; an expectation of hearing more detailed information about progress after the earlier announcement; and thinking about only recent exposure in response to the question, which would then be influenced by the level of recent media and other activity. Local differences in coverage, particularly given the range of sources and issues, can also impact awareness differentially.

Key measures of community sentiment

In September-October 2017, over three-fifths of residents of Western Sydney expressed positive sentiment towards the airport on key measures of *favourability* (64% agreeing) and *positive benefits outweighing any negative impact* (63% agreeing). These results were similar to May-June 2017 (67% and 60% respectively). Around one in ten held a negative position on each. There were also similar positive positions in September-October 2017 on *concern about a negative impact of building the airport* (34% disagreeing compared with 34% in May-June 2017), and the *importance of 24/7 operation* (47% agreeing compared with 45% in May-June 2017).

Favourability

Just under two thirds (64%) of Western Sydney residents in September-October 2017 were favourable to the new airport being at Badgerys Creek, similar to the result in May-June 2017 (67%). The results in 2017 show an increase in favour compared with December 2016 (56%). Most of the increase in favourability was from a reduction in those unsure, indicating an impact of media and other informational activity. Increase in favourability was evident across gender and age groups, and with a greater increase in South West and West Central regions.

There was a more similar profile of agreement and disagreement across the regions in September-October 2017 compared with May-June 2017. Averaging the results of the two 2017 surveys did, however, show some differences on disagreement, with residents of South West region and North

West region marginally more likely to disagree (12-13%) compared with the other regions of (5-6%). The greatest favourability was among male residents and those aged 55 years and over.

Positive benefits

Well over half (63%) of Western Sydney residents in September-October 2017 agreed that the positive benefits of the new airport will outweigh any negative impacts, similar to the result in May-June 2017 (60%). These results represent an increase from 2016 (49% agreeing), occurring across gender groups, mainly among 35-54 year olds, and mainly among residents in South West and West Central regions, resulting in all four regions being at a similar level of positive agreement in September-October 2017. Most of the increase had been from a neutral/unsure position, and less than one in 10 (8%) in September-October 2017 disagreed with the position. Male residents expressed more positive sentiment than female residents in both the May-June and September-October 2017 surveys.

Concern about negative impact

In September-October 2017, residents were more divided on 'concern that building WSA will have a negative impact on Western Sydney', similar to the result in May-June 2017. In the latest survey, around one-third (32%) of residents agreed with the statement, expressing overall concern, similar to the result in May-June 2017 (30%). One-third (33%) of residents in September-October 2017 disagreed with the statement, expressing low concern, again similar to the earlier survey (34%). The remaining third of residents were indecisive on the issue (neutral or unsure).

Importance of 24/7 operation

A positive perception in September-October 2017 of the importance of 24/7 operation of the new airport (45%) was similar to May-June 2017 to 47%). There continued to be over a quarter (28%) of residents in September-October 2017 who were neutral or undecided on the issue.

Disagreement in the current wave was more prevalent among female residents, residents aged 55 years and over and residents not identifying with a culturally and linguistically diverse community.

Perceived barriers and motivators

While the majority of residents in September-October 2017 had a positive overall perception that benefits of the airport outweigh any negative impacts, there continue to be areas of more concern to residents. This situation indicates an opportunity to provide more education and evidence about benefits and how areas of concern are being addressed.

Concerns

Important areas of concern in September-October 2017 continued to encompass traffic, noise and environmental impact. Increases in concern compared with May-June 2017 on some issues in Inner West region, along with marginal decreases in South West region, resulted in relative uniformity of perceptions across the regions. Over half of residents overall in September-October 2017 expressed concern in:

- increase in traffic both during construction (53%) and once running (53%)
- noise late at night and early in the morning if the airport operates 24 hours a day (53%)
- general noise pollution once running (51%).

Benefits

Key benefits of a new airport in Western Sydney that were acknowledged by two-thirds or more of residents in September-October 2017 encompassed economic gains for the area and Sydney's global competitiveness:

- will bring jobs to the region (76% in September-October 2017)
- needed to support the current airport at Mascot (72%)
- necessary to maintain and grow Sydney's global competitiveness (70%)
- will boost business and tourism in Western Sydney (68%)
- necessary to support Western Sydney's growing population and economy (68%).

Relationship with favourability of the airport

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

Rail link

In September-October 2017, Western Sydney residents continued to have a strong interest in a rail link for the airport, with a large majority agreeing it should be: available from day one (79%); linked to Western Sydney suburbs (85%); and linked to the Sydney CBD (81%). There was some acknowledgement that the rail link should be based on demand for services (33% agreeing). Given the strong interest, the rationale for decisions related to rail, such as the investment required to build a rail connection to the airport, should be addressed in communications.

Informing the community

The majority (57%) of Western Sydney residents in September-October 2017 continued to see it as very important to be informed about progress of the Western Sydney Airport, with less than one in ten (7%) considering it of low importance. Importance in South West region had declined from May-June 2017 (from 66% to 54%), with a corresponding increase in a neutral/unsure position (from 25% to 34%). The decline in South West region might indicate some dissipation of strong interest following the initial announcement of the development of the airport in the local area. The overall distribution in September-October 2017 of higher, lower and neutral importance ratings was similar across the regions.

Among residents in the current wave perceiving some importance of being kept informed, the top three unpaid channels as sources of information about the airport's development included media coverage (nominated by 60%), a website dedicated to the airport (34%) and social media (32%). Nomination of a dedicated website had declined overall from the earlier survey (41%, particularly in North West region); as had several other channels, including local council (from 39% to 31% overall, particularly in South West region) and local MP (from 30% to 19% overall, particularly in North West region and West Central region).

While there is a moderately strong desire for a dedicated website (34%), the incidence of residents reporting having used the existing dedicated website as a source of information in the last three months was low (5%).

1.5. Conclusions and Recommendations

The core recommendations from the May-June 2017 benchmark continue to be relevant following the September-October 2017 wave.

Table 1: Key findings and recommendations

Key findings	Recommendations
1. Understand current levels of awareness and sources of information for Western Sydney Airport	
<ul style="list-style-type: none"> The large majority of residents were aware of the airport, although there was some decline in those considering they knew at least 'quite a lot'. There is scope to increase knowledge progressively and, importantly, to maintain knowledge, particularly as further developments in construction etc. occur. Awareness was strongest about the site being in Western Sydney, that the Australian Government is building the airport, and that roads will be improved to support the airport. Most information is reported to come from mainstream media including television, print newspapers and radio; and word of mouth. 	<ul style="list-style-type: none"> Utilising media releases and other promotional activity which can be reported in news programs and articles provides the potential to reach the general population effectively, and maintain awareness and knowledge of the development. Such activity can generate, and be built on by, word of mouth communication. Awareness of such a major infrastructure development can generate the expectation of hearing more information, and there is an opportunity to build stronger positive sentiment and understanding of benefits.
2. Explore current levels of community perceptions of the airport	
<ul style="list-style-type: none"> Improvements have been maintained in positive sentiment towards the new airport, including the level of favourability and benefits outweighing negative impacts, as well as some decline in concern about a negative impact. An increase in disagreement with the importance of the airport operating 24/7 has continued. Strong interest and expectation for a rail link were expressed, including operation from 'day one'. 	<ul style="list-style-type: none"> Communications should include Information about the necessity of 24/7 operation, and how issues associated with noise are being addressed. Information about the realistic implementation of a rail link, including the investment required to build it, should be communicated to residents, including the reasons for the path being taken.

3. Identify the perceived barriers and motivators towards a positive perception of the airport

- | | |
|--|---|
| <ul style="list-style-type: none"> • Western Sydney has some concern that the airport will have a negative impact on the region. • Key areas of concern were associated with increase in traffic, noise and other environmental impacts, both during and after construction. • Key benefits were economic gains for the area, including jobs and business/tourism and 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. | <ul style="list-style-type: none"> • Communications should provide information about the expected benefits to the economy infrastructure in the area, and to the broader benefits for Sydney, particularly based on results of similar infrastructure development. • Communications should also include results of the final Environmental Impact Statement and other reports which provide factual, evidence-based information about impacts, and the steps being taken to address them. |
|--|---|

4. Identify preferred (unpaid) channels for communication

- | | |
|--|---|
| <ul style="list-style-type: none"> • A dedicated airport website continues to be well-received as a source of information, but reported use has been very low. • Other preferred channels include local councils and social media. | <ul style="list-style-type: none"> • A cost-effective way to promote the website should be developed, potentially through social media or in co-operation with councils. |
|--|---|

2 Background and Objectives

2.1. Study Context

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

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

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

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

2.2. Research Objectives

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

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

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

3 Research Method

3.1. Research Design

The method for the current series of surveys, starting in May-June 2017 and continuing in September-October 2017, was based on the five tracking surveys conducted earlier between November 2014 and December 2016. With the progress in the development of the Western Sydney Airport since the December 2016 wave, including the announcement of commitment of the Australian Government to deliver and invest in the Airport, 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.

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

3.2. Target Audience

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

Table 2: Western Sydney Regions and Local Government Areas for the May-June 2017 and September-October 2017

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 2. The Regions are broadly similar to those used in the earlier survey series with the following changes:

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

3.3. Sampling and Weighting

Quotas for the September-October 2017 survey were set by age, gender and region. The sampling was set to equal targets of 150 per region, to allow for more consistent levels of precision of results for each region when making comparisons. The final survey sample was post-weighted to the population based on age, gender and region, as well as maintaining an incidence of 30% identified from culturally and linguistically diverse communities.¹

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

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

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

3.4. Questionnaire

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

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

3.5. Results and comparisons

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

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 into account any relationships with age.

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.

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, for example:

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

An additional set of symbols has been used to highlight statistically significant differences in:

- higher level of knowledge about the airport for different levels of favourability in Figure 5, showing higher ↑ or lower ↓ results
- sentiment in communications in Figures 21–24, showing improvement ↑ or decline ↓ in average sentiment.

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 2017 in Table 5. The four results add to 99% rather than 100% due to rounding).

3.6. Sample Profile

Table 3 outlines the unweighted demographic breakdown of the September-October 2017 sample.

Table 3: Sample profile, unweighted (Sep-Oct 2017)

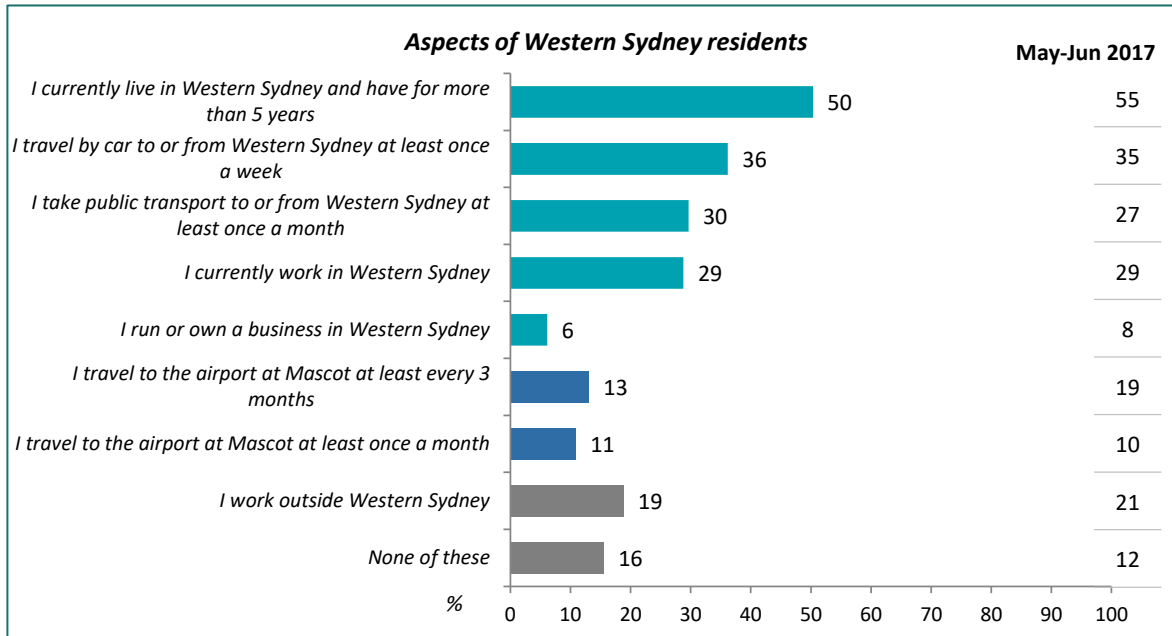
Variable	Profile	Total	
		%	n
Total	All	100	615
Gender	Male	51	311
	Female	49	304
Age	18-34	30	185
	35-54	39	238
	55+	31	192
Region	South West	25	152
	Inner West	25	151
	North West	26	162
	West Central	24	150
Culturally and Linguistically Diverse Background	Yes	27	167
	No	70	432
	Prefer not to say/Unsure	3	16
Aboriginal and/or Torres Strait Islander	Yes	2	10
	No	87	536
	Prefer not to say/Unsure	11	69
Education	Completed some high school	9	54
	High school graduate	18	111
	Technical college / TAFE	23	144
	Undergraduate degree	28	170
	Postgraduate degree	19	119
	Prefer not to say	3	17

Table 3 (cont.)

Variable	Profile	Total	
		%	n
Employment	Work full-time (≥35 hours per week)	41	255
	Work part-time (<35 hours per week)	16	100
	Self-employed	6	34
	Retired	17	106
	In full time education	3	20
	Full time home / house duties	7	44
	Receiving government allowance	1	6
	Not currently employed	4	22
	Prefer not to say	5	28
Household Income	<\$40k	13	80
	\$40,000 - \$64,999	13	80
	\$65,000 - \$79,999	9	55
	\$80,000 - \$99,999	11	66
	\$100,000 - \$119,999	10	61
	\$120k+	16	96
	Prefer not to say/Unsure	29	177
Marital Status	Registered married	58	359
	De facto/cohabiting relationship	8	48
	Not married	30	182
	Prefer not to say	4	26
Parental Status	Children	34	212
	No Children	63	385
	Prefer not to say	3	18

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 (Sep-Oct 2017 and comparison with May-Jun 17)



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

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

As in the May-June 2017 survey, residents in Inner West region 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 identifying with any of the descriptions.

Table 4: Aspects of Western Sydney residents by region (Sep-Oct 2017)

Aspects	TOTAL	Region			
		South West	Inner West	North West	West Central
	%	%	%	%	%
<i>I currently live in Western Sydney and have for more than 5 years</i>	50	61	14	54	56
<i>I travel by car to or from Western Sydney at least once a week</i>	36	31	22	37	43
<i>I take public transport to or from Western Sydney at least once a month</i>	30	29	24	25	37
<i>I currently work in Western Sydney</i>	29	26	14	35	30
<i>I run or own a business in Western Sydney</i>	6	6	5	11	2
<i>I travel to the airport at Mascot at least every 3 months</i>	18	16	27	15	17
<i>I travel to the airport at Mascot at least once a month</i>	11	9	13	6	15
<i>I work outside Western Sydney</i>	19	14	29	20	16
<i>None of these</i>	16	17	27	12	13
<i>Sample size</i>	615	152	151	162	150

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

Base: All (n=615)

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

4 Key Measures

4.1. Sentiment

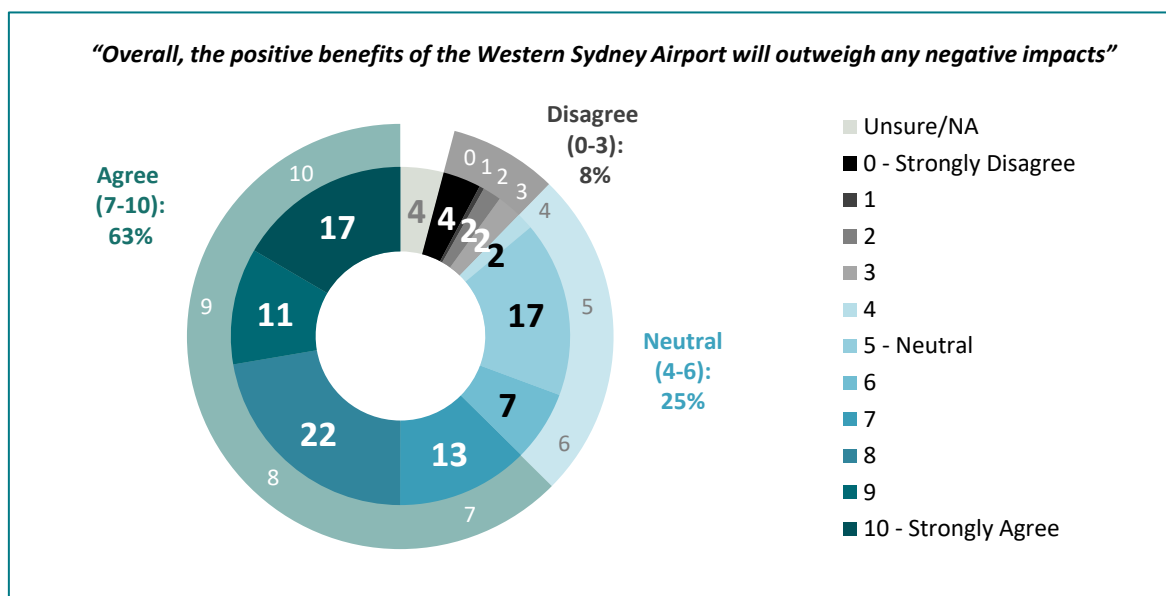
Measures of Sentiment

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

Perception that the overall benefits outweigh any negative impacts

In September-October 2017, the majority (63%) of Western Sydney residents agreed (rating 7-10) with the sentiment that overall benefits of the new airport development outweigh any negative impact (Figure 2), similar to the result in the May-June 2017 wave (60%), and maintaining an increase over results from surveys in 2016 (48-49%) (Table 5).

Figure 2: Perception of overall benefits of Western Sydney Airport vs. negative impacts (Sep-Oct 2017)



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

Base: All (n=615)

Table 5: Perception of overall benefits of Western Sydney Airport vs. negative impacts (Nov 2014 to Sep-Oct 2017)

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

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

In the current wave, one-quarter (25%) were neutral (rating 4-6) or unsure, and less than one in ten (8%) disagreed (rating 0-3) (Figure 2). The increase in agreement in the previous wave followed the announcement in the Federal budget that the development would go ahead.

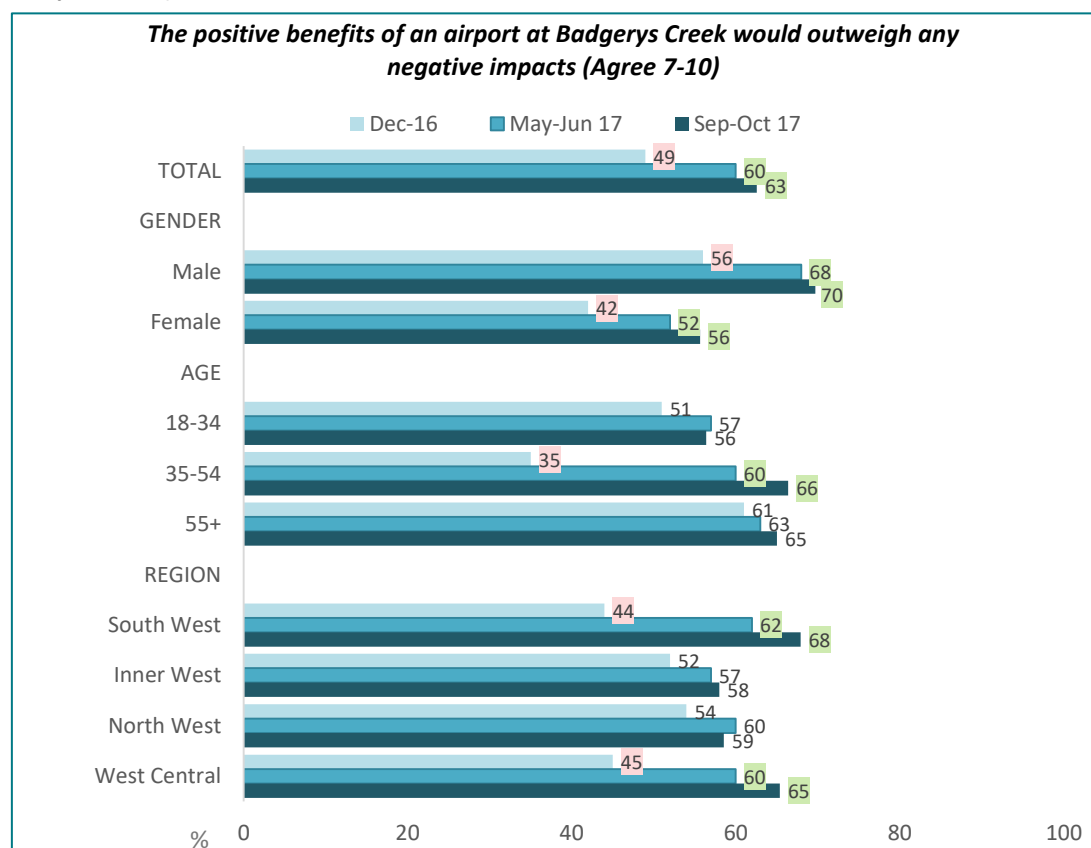
Across the demographics, agreement with the proposition continued to be stronger among males (70% agreeing) than females (56%), with a corresponding difference on the neutral position (20% vs. 30% respectively), rather than disagreement (Table 6). Among the age groups, the main difference was for the younger 18-34 year old group to continue to be more likely to be neutral (34%) compared with the older groups (20% to 21%), with a corresponding marginally lower position on either agreement or disagreement. The categories of perception were relatively similar across the four regions.

Table 6: Perception of overall benefits of Western Sydney Airport vs. negative impacts, by demographics (Sep-Oct 2017)

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	8	7	9	6	9	10	11	9	9	6	5	10
4-6 Neutral	25	20	30	34	20	21	19	29	29	23	27	24
7-10 Agree	63	70	56	56	66	65	68	58	59	65	63	63
Unsure	4	3	5	4	5	4	2	4	3	6	5	4
Sample size	615	311	304	185	238	192	152	151	162	150	167	432

Q7. Agreement: "Overall, the positive benefits of the Western Sydney Airport at Badgerys Creek would outweigh any negative impacts"
Base: All (n=615) Shading highlights statistically significantly higher and lower results between groups

Figure 3: Perception of overall benefits of Western Sydney Airport vs. negative impacts, by demographics (Dec 2016 to Sep-Oct 2017)



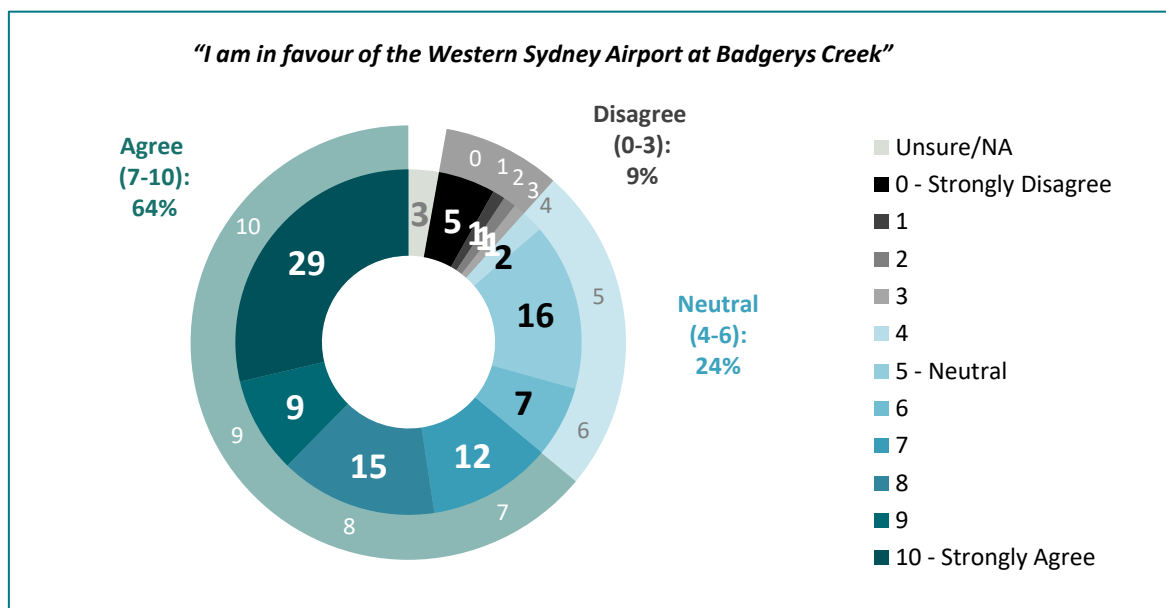
Q7. Agreement: "Overall, the positive benefits of the Western Sydney Airport at Badgerys Creek would outweigh any negative impacts"
Base: All (n=615) Shading highlights statistically significantly higher and lower results between waves

Comparing the waves from December 2016 onwards illustrates that the substantial increase in agreement in May-June 2017 was maintained into September-October 2017 among both male and female residents, residents aged 35-54 years, and residents in both South West region (where the development site is located) and West Central region (Figure 3).

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 September-October 2017, close to two-thirds (64%) were in favour (rating 7-10) (Figure 4). This result maintained largely the increase seen in May-June 2017 (64%) compared with results during 2016 when less than three-fifths agreed (56-57%) (Table 7).

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



Q13. Using a scale of 0 to 10, where 0 means strongly disagree and 10 means strongly agree, to what extent do you agree or disagree with the following statement? "I am in favour of the Western Sydney Airport at Badgerys Creek"
 Base: All (n=615)

Table 7: Favourability of the Western Sydney Airport at Badgerys Creek by waves (Nov 2014 to Sep-Oct 2017)

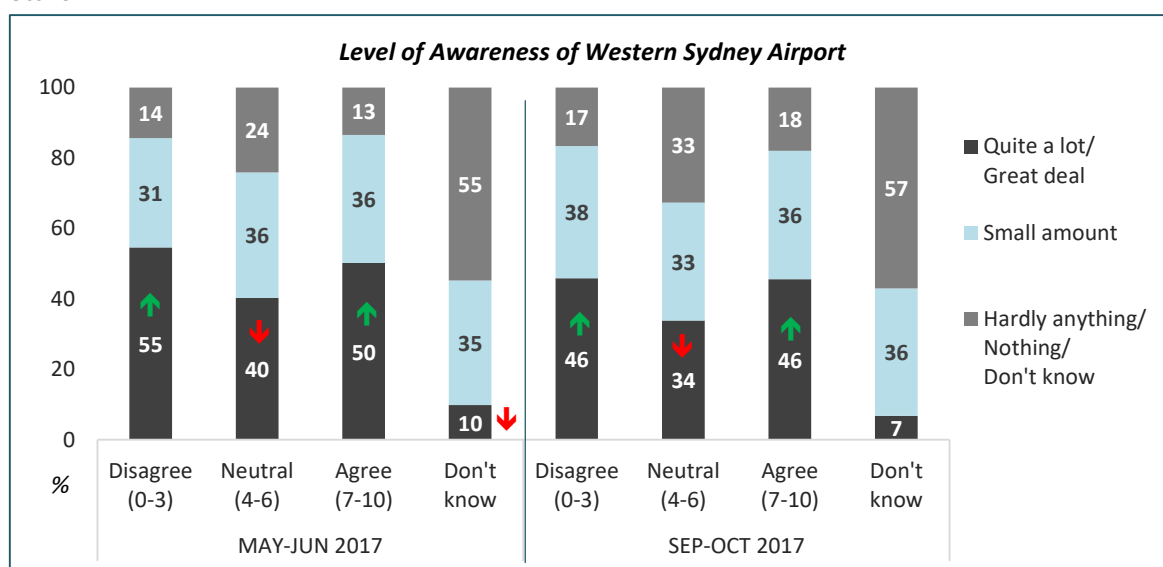
Sentiment towards the airport								
Agreement	INITIAL BENCHMARK November 2014	June 2015	December 2015	April 2016	August 2016	December 2016	NEW BENCHMARK May-June 2017	Sep-Oct 2017
Rated 0-10	%	%	%	%	%	%	%	%
0-3 Disagree	12	12	8	12	12	11	10	9
4-6 Neutral	28	25	25	25	26	25	22	24
7-10 Agree	54	56	61	57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

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

Much of the relative increase in favourability was accompanied by a decrease in those unsure (rating 'don't know'), indicating improvement in a more positive perception by reaching a group that was previously less aware. This relationship was supported by those residents who were unsure about being in favour of the airport being the least likely to say that they knew more than a 'small amount' about the airport, in both May-June 2017 (10%) and September-October 2017 (7%) (Figure 5). The pattern was similar in the latest wave despite a very low incidence of residents who were unsure (1%).

In addition, there was a similar pattern in both waves for this higher level of knowledge of the airport to also being lower among residents *neutral* about favourability, compared with residents expressing *high* or *low* favourability (May-June 2017: 40% vs. 50% and 55%; September-October 2017: 34% vs. 46% and 57%).

Figure 5: Level of awareness of the Western Sydney Airport at Badgerys Creek, by favourability (May-Jun 17 and Sep-Oct 2017)



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

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

Base: All (May-June 2017, n=1244; September-October 2017, n=615)

Highlighting a statistically significant difference on heard 'quite a lot/great deal': ↑ higher, ↓ lower

There were few significant differences measured between the demographic groups on favourability of the airport in September-October 2017 (Table 8). The main differences were for the younger 18-34 year old group to be more likely to hold a neutral sentiment (32% vs. 18% to 22% for the other age groups), with a corresponding marginally lower level of agreement (57% vs. 65% to 71%).

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

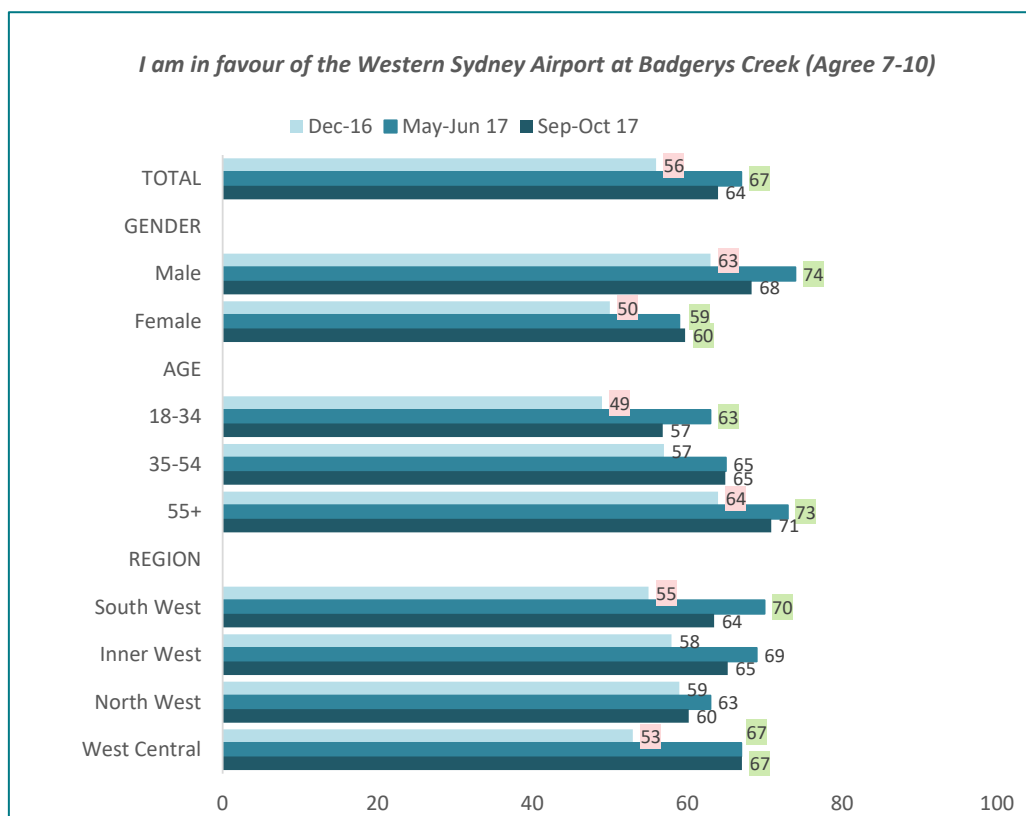
Agreement	TOTAL	Gender		Age			Region				Culturally and Linguistically Diverse	
		Male	Female	18-34	35-54	55+	South West	Inner West	North West	West Central	Yes	No
Rated 0-10	%	%	%	%	%	%	%	%	%	%	%	%
0-3 Disagree	9	7	11	8	10	8	12	7	10	7	5	11
4-6 Neutral	24	23	26	32	22	18	23	24	27	23	26	23
7-10 Agree	64	68	60	57	65	71	64	65	60	67	65	64
Unsure/NA	3	2	3	3	3	2	1	4	3	3	4	2
Sample size	615	311	304	185	238	192	152	151	162	150	167	432

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=615) Shading highlights statistically significantly higher and lower results

Comparing the waves from December 2016 shows an increase in favourability particularly in May-June 2017 (from 56% to 67%), which was largely maintained in September-October 2017 (64%) (Figure 6). The increase had occurred among both males and females, and broadly across the age groups. Increases had occurred particularly in South West region and West Central region, with some flattening in September-October 2017, resulting in the more equal level of favourability referred to above.

Figure 6: Favourability of the Western Sydney Airport at Badgerys Creek, by demographics (December 2016 to Sep-Oct 2017)



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

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

Shading highlights statistically significantly higher and lower results between waves

4.2. Perceived Benefits and Concerns

Perceptions of needs, benefits and impacts

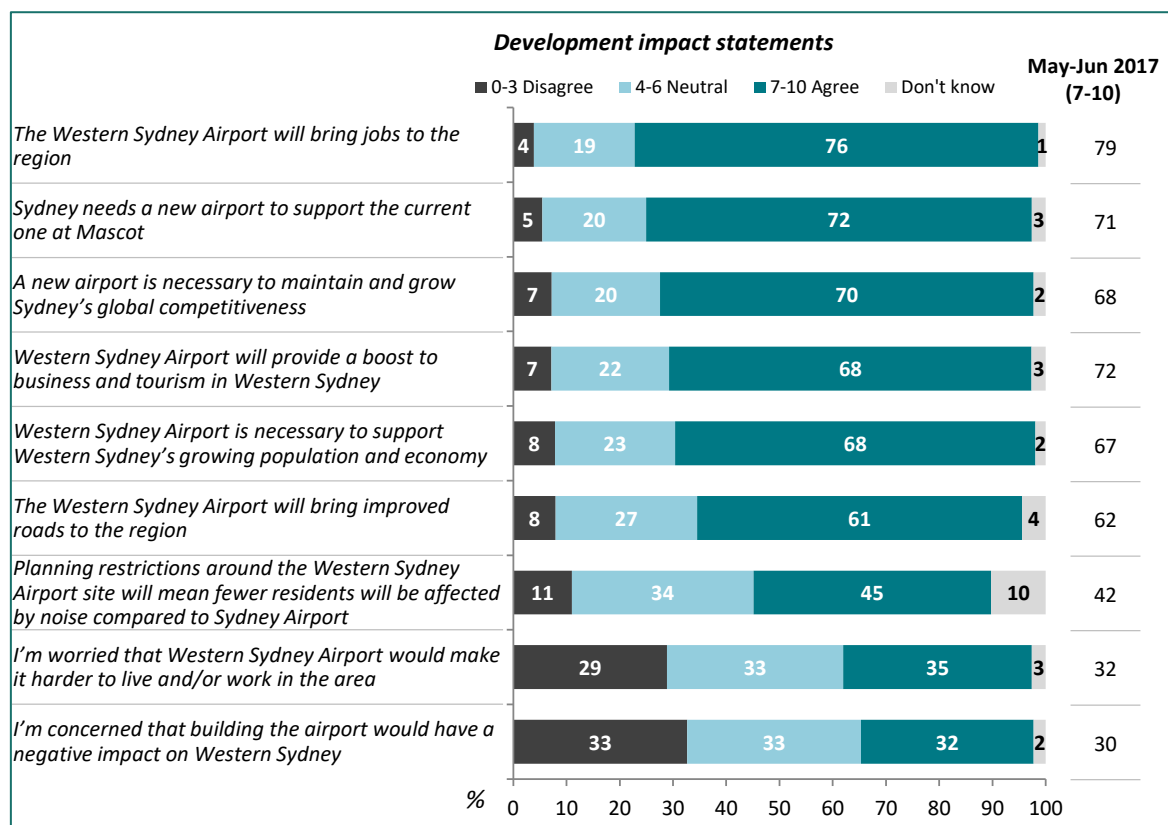
Perceptions were measured on a range of needs, benefits and concerns around the development of the Western Sydney Airport. A key issue measured was whether the development would have a negative impact on Western Sydney.

There were no significant changes in agreement (rating 7-10) from the May-June 2017 wave (Figure 7). There was, similarly, little movement in disagreement and neutral positions.

In September-October 2017, around three-quarters (76%) continued to agree that the airport will 'bring jobs to the region'. Other benefits specifically to Western Sydney, with over half agreeing included 'boost to business and tourism in Western Sydney' (72%), 'necessary to support Western Sydney's growing population and economy' (68%) and 'improved roads to the region' (61%). A similar level of support was evident for broader benefits to Sydney, including 'support the current airport at Mascot' (70%) and 'maintain and grow Sydney's global competitiveness' (68%).

Agreement continued to be lower for a perception that fewer residents will be affected by noise compared with Mascot (45%), with over two-fifths (44%) neutral or unsure. There also continued to be greater polarisation on perception of concerns about building the airport, with similar numbers agreeing and disagreeing, including making it 'harder to live or work in the area' (35% agree, 29% disagree) and having 'a negative impact on Western Sydney' (32% agree, 33% disagree (Figure 7).

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



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

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

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 was maintained in September-October (Table 9). Disagreement had increased from an average of 24% of residents in 2016 to 34% in May-June 2017, being maintained at 33% in September-October. The increase had been accompanied by some decrease in both agreement and being undecided.

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

Concerned about the negative impact building an airport would have on Western Sydney								
Agreement	INITIAL BENCHMARK November 2014	June 2015	December 2015	April 2016	August 2016	December 2016	NEW BENCHMARK May-June 2017	Sep-Oct 2017
Rated 0-10	%	%	%	%	%	%	%	%
0-3 Disagree	25	22	21	24	23	25	34	33
4-6 Neutral	37	38	41	35	38	32	34	33
7-10 Agree	33	36	34	37	35	36	30	32
Don't know	5	4	4	4	4	6	2	2
Sample size	501	513	502	499	505	503	1244	615

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

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

Shading highlights statistically significantly higher and lower results between waves

Looking at the demographic breakdown, the main differences in September-October 2017 were for lower concern among residents aged 55 years and older (22% agreeing, vs. 36% to 38% for the other aged groups) (Table 10).

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

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	33	37	29	24	32	43	33	28	35	33	31	34
4-6 Neutral	33	29	36	37	29	32	32	34	32	33	29	34
7-10 Agree	32	32	33	38	36	22	32	33	32	32	38	30
Unsure/NA	2	2	3	1	3	2	3	4	1	2	1	2
Sample size	615	311	304	185	238	192	152	151	162	150	167	432

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?

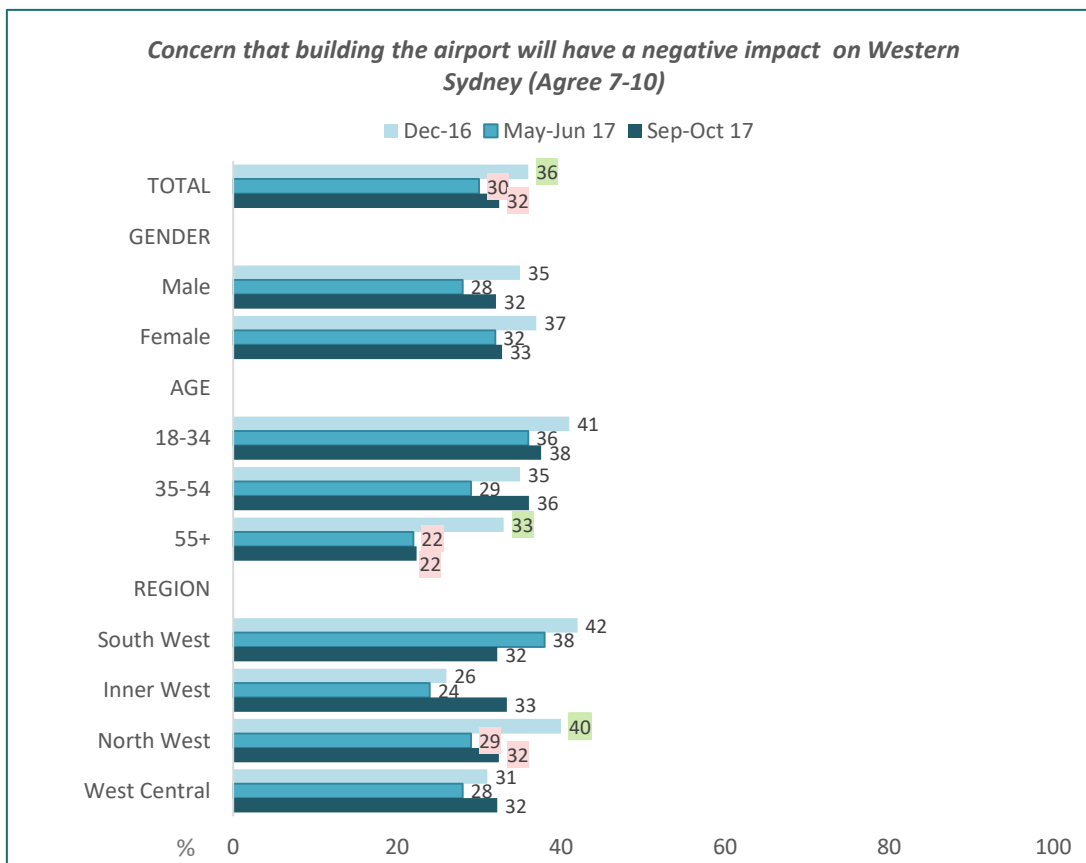
Base: All (n=615)

Shading highlights statistically significantly higher and lower results between groups

In September-October 2017, there was relative uniformity between the regions about an overall negative impact. This uniformity was influenced by a decrease in concern measured in both South West and North West regions compared with May-June 2017, and a trend for an increase in concern in Inner West region (Figure 8).

The overall decrease in concern occurring during 2017 was mainly among residents aged 55 years and over.

Figure 8: Concern that building the airport would have a negative impact on Western Sydney, by demographics (Dec 2016 to Sep-Oct 2017)



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

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

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

There were no significant differences among the regions in September-October 2017 (Table 11). There was some increase in September-October 2017 compared with May-June 2017 in concern that the airport ‘...would make it harder to live and/or work in the area.’ among residents in both Inner West and West Central region.

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

Agreement	WAVE and REGION									
	Sep-Oct 2017					Statistically significant change from May-Jun 2017				
	Total	South West	Inner West	North West	West Central	Total	South West	Inner West	North West	West Central
Rated 7-10	%	%	%	%	%	%	%	%	%	%
The Western Sydney Airport will bring jobs to the region	76	74	76	71	81	–	–	–	–	–
Sydney needs a new airport to support the current one at Mascot	72	70	76	74	71	–	–	–	–	–
A new airport is necessary to maintain and grow Sydney’s global competitiveness	70	69	72	68	72	–	–	–	–	–
Western Sydney Airport will provide a boost to business and tourism in Western Sydney	68	73	69	62	71	–	–	–	–	–
Western Sydney Airport is necessary to support Western Sydney’s growing population and economy	68	66	65	64	73	–	–	–	–	–
The Western Sydney Airport will bring improved roads to the region	61	57	62	57	66	–	–	–	–	–
Planning restrictions around the Western Sydney Airport site will mean fewer residents will be affected by noise compared to Sydney Airport	45	39	48	44	47	–	–	–	–	–
I’m worried that Western Sydney Airport would make it harder to live and/or work in the area	35	32	37	31	40	–	–	+11	–	+11
I’m concerned that building the airport would have a negative impact on Western Sydney	32	32	33	32	32	–	–	–	–	–
Sample size	615	152	151	162	150					
Highlighting statistically significantly higher and lower results: between region in Sep-Oct 2017 comparing each region with May-Jun 2017										

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

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

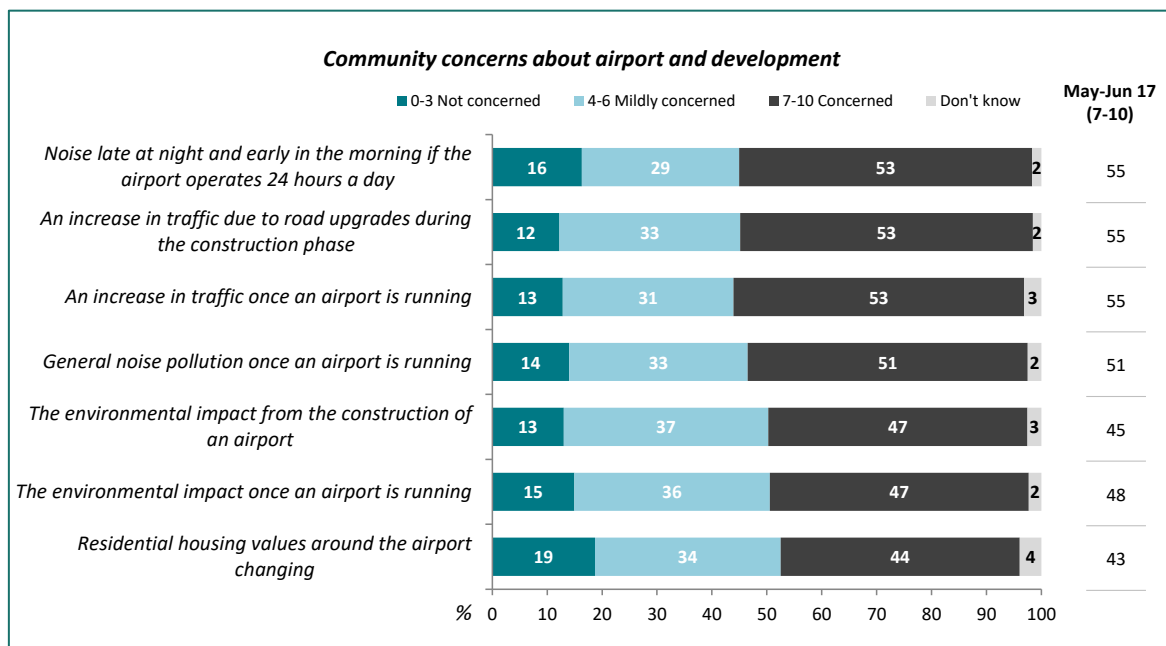
Potential concerns about environmental impacts

Perceptions were measured about concerns that residents had with a range of impacts of the Western Sydney Airport development on home values, traffic, noise and other environmental issues. Over half of residents in September-October 2017 continued to be concerned (rating 7-10) about increases in traffic and noise (Figure 9):

- potential for ‘an increase in traffic due to road upgrades during the construction phase’ (53%)
- ‘an increase in traffic once an airport is running’ (53%)
- ‘noise late at night and early in the morning if the airport operates 24 hours a day’ (53%)
- ‘general noise pollution once an airport is running’ (51%).

Female residents were more likely than male residents to express concern about all seven issues presented, ranging from 10 to 15 percentage points higher. The largest difference was on concern about ‘general noise pollution once an airport is running’ (females: 58% vs. males: 44%; giving a 15 point difference after rounding).

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



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

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

There were no significant differences measured between the regions in September-October 2017 (Table 12). Residents in Inner West region had been less concerned about several impacts of the airport development in May-June 2017, and increases in several of these impacts—including increased traffic during construction, noise pollution once the airport is operating, and changing residential house values—resulted in the similar overall pattern of results across the regions.

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

Concerned	REGION							
	Sep-Oct 2017				Statistically significant change from May-Jun 2017			
	South West	Inner West	North West	West Central	South West	Inner West	North West	West Central
Rated 7-10	%	%	%	%	%	%	%	%
Noise late at night and early in the morning if the airport operates 24 hours a day	51	52	53	56	—	—	—	—
An increase in traffic due to road upgrades during the construction phase	55	54	49	56	—	—	—	—
An increase in traffic once an airport is running	52	54	52	54	—	+11	—	—
General noise pollution once an airport is running	47	52	53	51	—	+14	—	—
The environmental impact from the construction of an airport	45	52	47	46	—	—	—	—
The environmental impact once an airport is running	48	49	46	46	—	—	—	—
Residential housing values around the airport changing	44	44	42	45	—	+12	—	—
Sample size	152	151	162	150				
Highlighting statistically significantly higher and lower results: between regions in Sep-Oct 2017 comparing each region with May-Jun 2017								

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

Base: All (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 both the May-June 2017 and September-October 2017 surveys to give a more stable assessment. An initial principal components analysis was conducted on the statements in Q8 and Q9 using the full 0-10 scale, with equal weighting given to the May-June 2017 and September-October 2017 surveys. This type of analysis identifies which statements have similar patterns of ratings. Three groupings of statements were identified: environmental impacts, overall concern about the airport development, and benefits the airport will bring. The ratings were averaged across statements in each grouping.

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

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

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

Demographic groups	Environmental impacts <i>More impact ⇨</i>	Concern overall + harder to live/work <i>More concern ⇨</i>	Meeting needs, improvements and benefits <i>More benefit ⇨</i>
GENDER			
Male	■ 5.8	■ 4.8	■ 7.4
Female	■ 6.6	■ 5.2	■ 7.2
AGE (years)			
18-34	■ 6.3	■ 5.5	■ 7.0
35-54	■ 6.5	■ 5.2	■ 7.3
55+	■ 6.0	■ 4.2	■ 7.6
REGION			
South West	■ 6.3	■ 5.2	■ 7.2
Inner West	■ 6.5	■ 4.9	■ 7.3
North West	■ 6.0	■ 5.0	■ 7.1
West Central	■ 6.3	■ 4.9	■ 7.4
CALD			
Yes	■ 6.4	■ 5.0	■ 7.5
No	■ 6.2	■ 5.0	■ 7.2
	Average rating (0-10)	Average rating (0-10)	Average rating (0-10)
Statements contributing most strongly to each dimension	- General noise pollution once an airport is running - Increase in traffic once an 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 an airport is running - Environmental impact from the construction of an airport - Residential housing values around the airport changing	- 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	- 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: May-June 2017 and September-October 2017, with equal contribution in generating the dimensions
 Highlighting statistically significantly more positive and negative sentiment between groups

Key differences between the groups were:

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

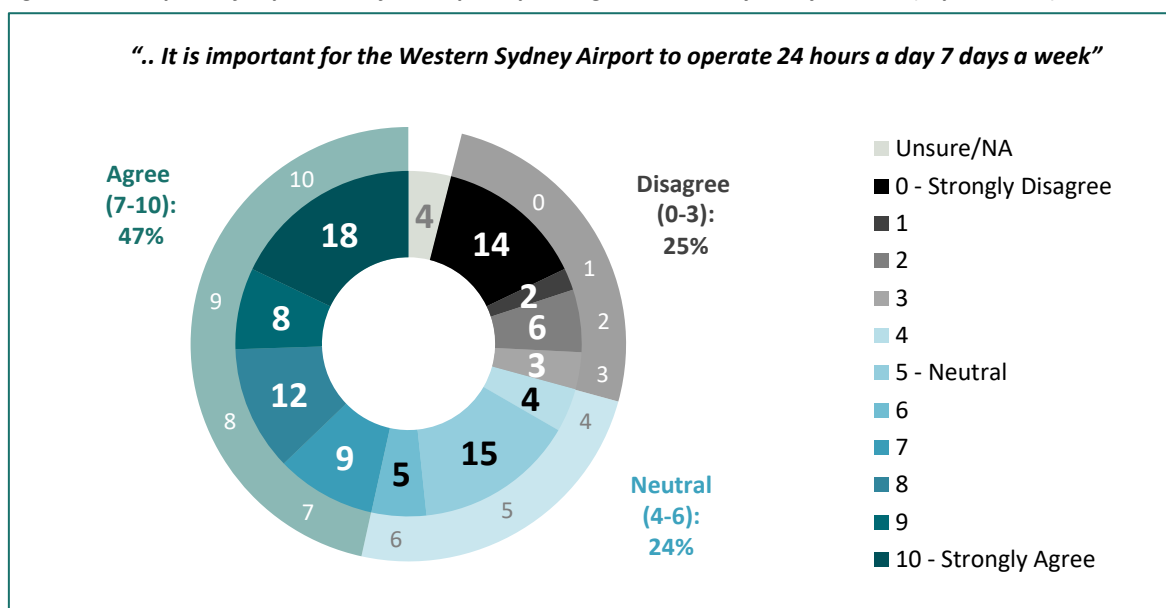
There were no significant differences measured between the regions.

Among these topics, the **level of agreement with benefits** of the airport had the strongest association with **favourability of the airport** (Figure 10).

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

Residents rated the importance of the Western Sydney Airport operating 24 hours a day, 7 days a week. Close to half (47%) of residents in September-December 2017 agreed (rating 7-10) that it was important (Figure 11), similar to May-June 2017 (45%).

Figure 11: Perception of importance of the airport operating 24 hours a day, 7 days a week (Sep-Oct 2017)



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

Base: All (n=615)

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

The increase in disagreement (rating 0-3) with importance seen in May-June 2017 (from 19-20% in 2016 up to 27%) was largely maintained in September-October (25%), mostly related to a decrease in those undecided (Table 13). Around one-quarter (24%) continued to be neutral (Table 13).

Table 13: Perception of importance of the airport operating 24 hours a day, 7 days a week, by waves (Nov 2014 to Sep-Oct 2017)

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

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

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

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

Female residents (32%) were more likely than male residents (19%) to disagree with the importance of 24-hour operation, while male residents were more likely to agree (54% vs. 39%) (Table 14). Residents aged 55 years and over were also more likely to disagree (33%), particularly compared with those aged 18-34 years, and with the corresponding difference in the neutral position (Table 13). The lower disagreement among culturally and linguistically diverse residents seen in May-June 2017 was maintained in the current wave, and was confirmed when taking into account age.

Table 14: Perception of importance of the airport operating 24 hours a day, 7 days a week, by demographics (Sep-Oct 2017)

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	25	19	32	18	26	33	27	25	26	24	17	30
4-6 Neutral	24	24	24	31	22	20	23	26	24	25	29	21
7-10 Agree	47	54	39	47	48	44	44	43	47	49	50	45
Unsure/NA	4	3	5	4	4	3	6	6	3	3	4	3
Sample size	615	311	304	185	238	192	152	151	162	150	167	432

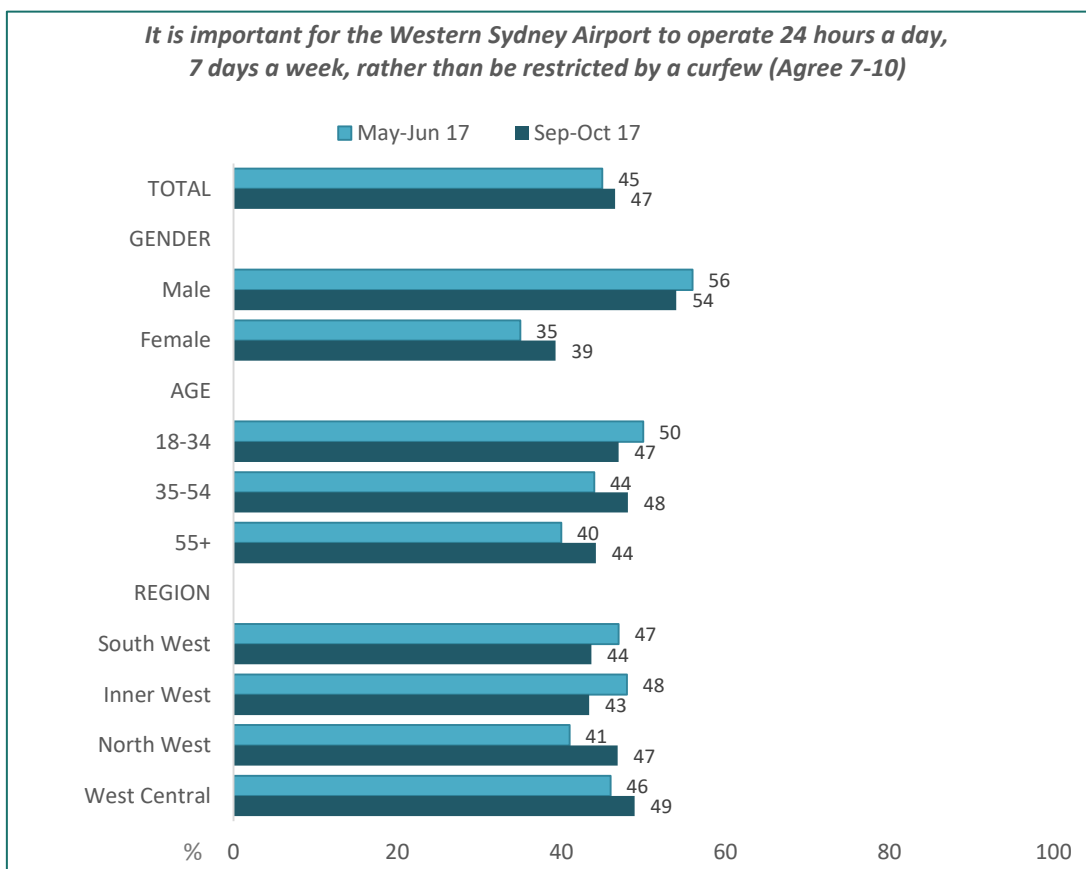
Q10. Using a scale of 0 to 10, where 0 means strongly disagree and 10 means strongly agree, to what extent do you agree or disagree with the following statement? "It is important for the Western Sydney Airport to operate 24 hours a day, 7 days a week, rather than be restricted by a curfew"

Base: All (n=615)

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

There were no significant changes from May-June 2017 among the main demographic groups (Figure 12).

Figure 12: Agreement with importance of the airport operating 24 hours a day, 7 days a week, by demographics (May-Jun 17 to Sep-Oct 2017)



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

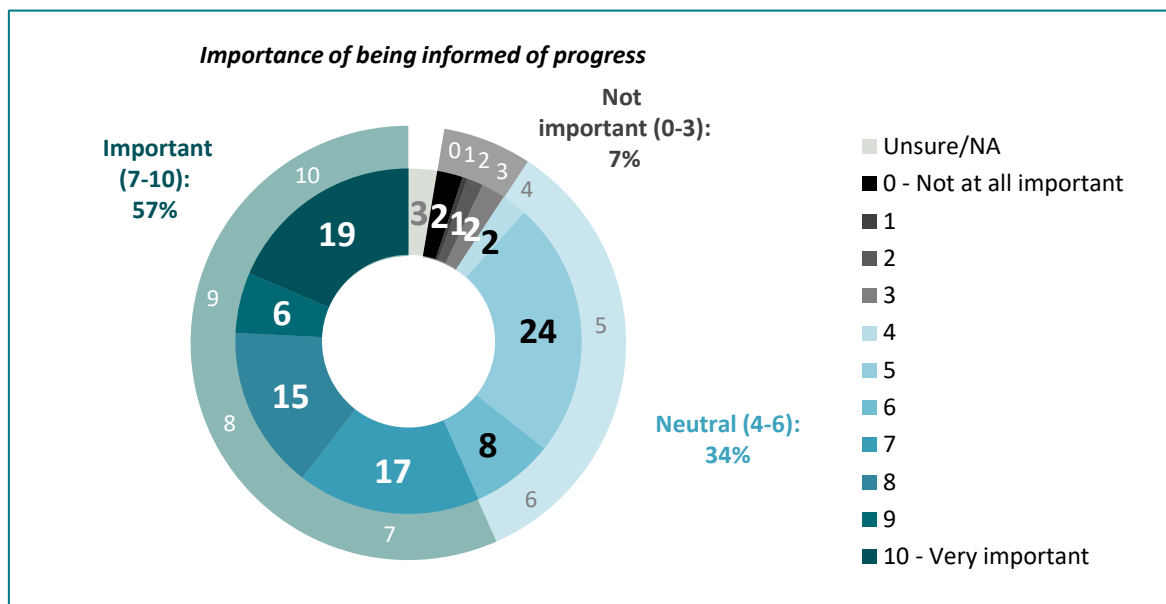
Base: All (n=615)

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

4.4. Communications

The majority (57%) of residents in September-October 2017 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 (7%), considering that it was not important (rating 0-3) (Figure 13). These results have remained relatively stable across the waves of research, with no significant variations (Table 15).

Figure 13: Perception of importance of being informed about progress of the Western Sydney Airport's development (Sep-Oct 2017)



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

Base: All (n=615)

Table 15: Importance of being informed of progress, by waves (Nov 2014 to Sep-Oct 2017)

Importance	Sentiment towards the airport						NEW BENCHMARK May-June 2017	Sep-Oct 2017
	INITIAL BENCHMARK November 2014	June 2015	December 2015	April 2016	August 2016	December 2016		
Rated 0-10*	%	%	%	%	%	%	%	%
0-3 Not important	9	7	7	6	8	7	8	7
4-6 Neutral	33	29	31	34	33	31	33	34
7-10 important	58	64	62	60	59	62	59	57
Sample size	501	513	502	499	505	503	1244	615

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 and Sep-Oct 2017

There were few differences in September-October 2017 between the demographic groups (Table 16). The main difference was for residents aged 18-34 years to be more likely to be neutral (42% rating 4-6 vs. 30% for the older groups).

While there were no significant differences between regions in September-October 2017, there was some decrease in rating of importance compared with May-June 2017 in South West region (from 66% down to 54%) suggesting some dissipation of strong interest following the initial announcement of the development in the local area (Table 17). The corresponding increase was in neutral/unsure responses.

Table 16: Importance of being informed about progress, by demographics (Sep-Oct 2017)

Importance	TOTAL	Gender		Age			Region				Culturally and Linguistically Diverse	
		Male	Female	18-34	35-54	55+	South West	Inner West	North West	West Central	Yes	No
Rated 0-10	%	%	%	%	%	%	%	%	%	%	%	%
0-3 Not important	7	6	7	4	8	8	9	9	5	6	5	8
4-6 Neutral	34	34	34	42	30	30	34	34	36	33	32	35
7-10 Important	57	57	57	52	58	60	54	55	57	58	60	55
Unsure	3	3	2	2	4	2	3	1	2	3	3	2
Sample size	615	311	304	185	238	192	152	151	162	150	167	432

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=615)

Shading highlights statistically significantly higher and lower results between groups

Table 17: Importance of being informed about progress, by region (Sep-Oct 2017 and comparison with May-Jun 2017)

Importance	REGION							
	Sep-Oct 2017				Statistically significant change from May-Jun 2017			
	South West	Inner West	North West	West Central	South West	Inner West	North West	West Central
Rated 0-10	%	%	%	%	%	%	%	%
0-3 Not important	9	9	5	6	-	-	-	-
4-6 Neutral	34	34	36	33	-	-	-	-
7-10 Important	54	55	57	58	-12	-	-	-
Unsure	3	1	2	3	-	-	-	-
Sample size	152	151	162	150				
Highlighting statistically significantly higher and lower results: between regions in Sep-Oct 2017 comparing each region with May-Jun 2017								

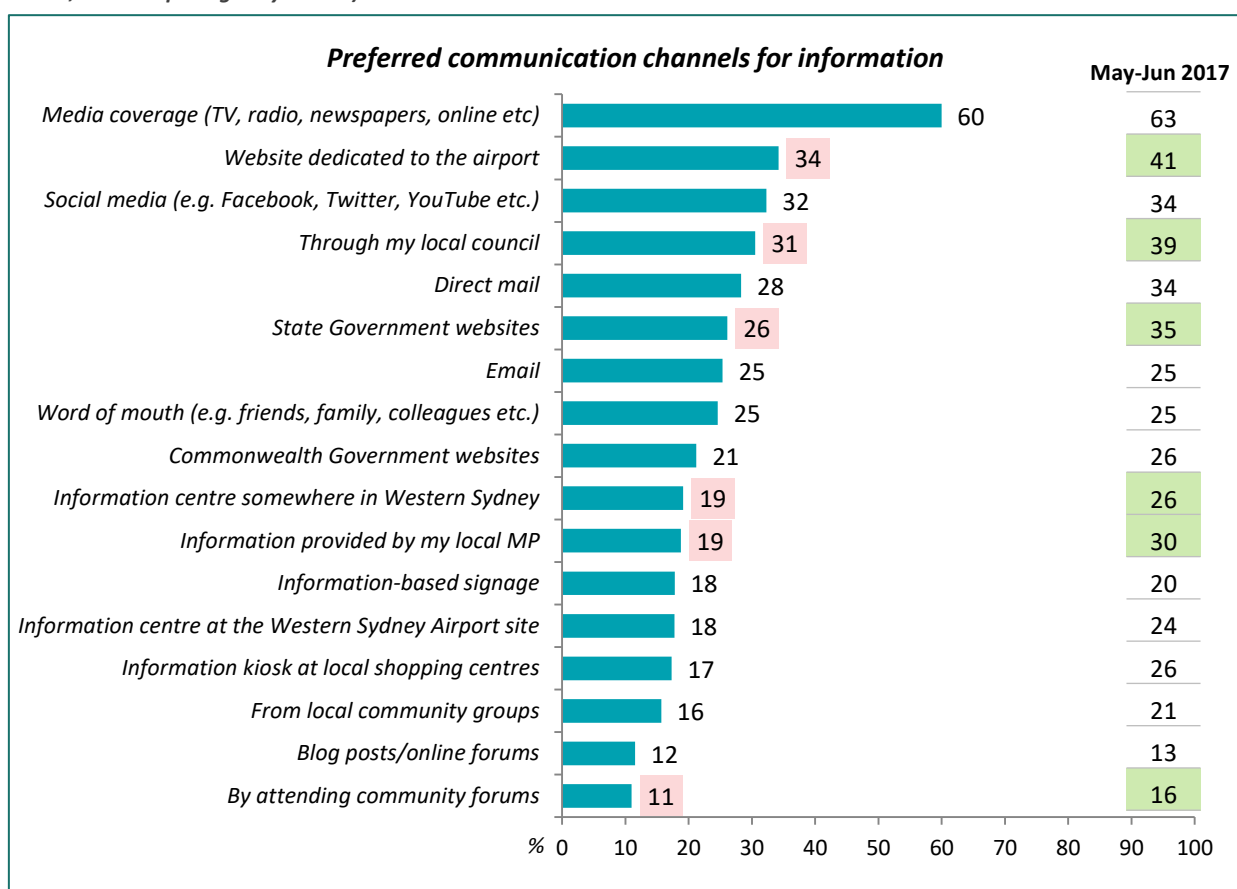
Q14. Using a scale of 0 to 10, where 0 means not at all important and 10 means very important, please indicate how you feel personally about being informed about the progress of the Western Sydney Airport at Badgerys Creek?

Base: All (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 most preferred communication channel, nominated by three-fifths (60%) of residents in September-October 2017, similar to the result in May-June 2017 (63%) (Figure 14). The next three channels represented both local and online sources, including a dedicated website (34%), social media (32%) and local council (31%).

There has been a decrease in the nominations of several channels, including a dedicated website and local council, compared with the May-June 2017 survey, again suggesting some dissipation of strong interest following the earlier announcement that the government would develop the airport. Relatively few residents were, again, interested in getting information from blog posts/online forums (12%) or attending community forums (11%).

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



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

Base: Those who provided a rating of 6-10 on importance in being informed of the airport's development (n=401)

Highlighting statistically significantly higher and lower results between waves

A comparison of preferred channels between the regions in September-October 2017 showed a higher preference in Inner West region for state government websites (42%, compared with South West (24%), North West (27%) and West Central (20%) (Table 18). There were some reductions in preference for specific channels compared with May-June 2017: among the more preferred channels, social media had decreased in preference in South West region to be at a similar level to the other regions, and similarly for a dedicated website in North West region. Preference for information from a local MP had also fallen in North West region and West Central region.

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

Channel	REGIONS							
	Sep-Oct 2017				Statistically significant change from May-Jun 2017			
	South West	Inner West	North West	West Central	South West	Inner West	North West	West Central
	%	%	%	%	%	%	%	%
Media coverage (TV, radio, newspapers, online, etc.)	62	63	59	59	-	-	-	-
Website dedicated to the airport	39	41	29	34	-	-	-15	-
Social media (e.g. Facebook, Twitter, YouTube, etc.)	26	32	33	34	-	-	-	-
Through my local council	32	26	33	30	-16	-	-	-
Direct mail	30	19	34	26	-	-	-	-
State Government websites	24	42	27	20	-	-	-	-12
Email	30	18	27	25	-	-	-	-
Word of mouth (e.g. friends, family, colleagues etc.)	27	20	26	24	-	-	-	-
Commonwealth Government websites	17	29	22	19	-	-	-	-
Information centre about Western Sydney Airport somewhere in Western Sydney	18	18	22	18	-	-	-	-
Information provided by my local MP	22	20	22	14	-	-	-14	-14
Information-based signage	22	17	21	13	-	-	-	-
Information centre at the Western Sydney Airport site	13	25	19	16	-17	-	-	-
Information kiosk at local shopping centres	24	16	16	16	-	-	-13	-
From local community groups	16	17	18	13	-	-	-	-
Blog posts/online forums	12	15	12	9	-	-	-	-
By attending community forums	8	13	10	12	-10	-	-	-
Sample size	96	99	110	96				
Highlighting statistically significantly higher and lower between regions in Sep-Oct 2017 comparing each region with May-Jun 2017 results:								

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

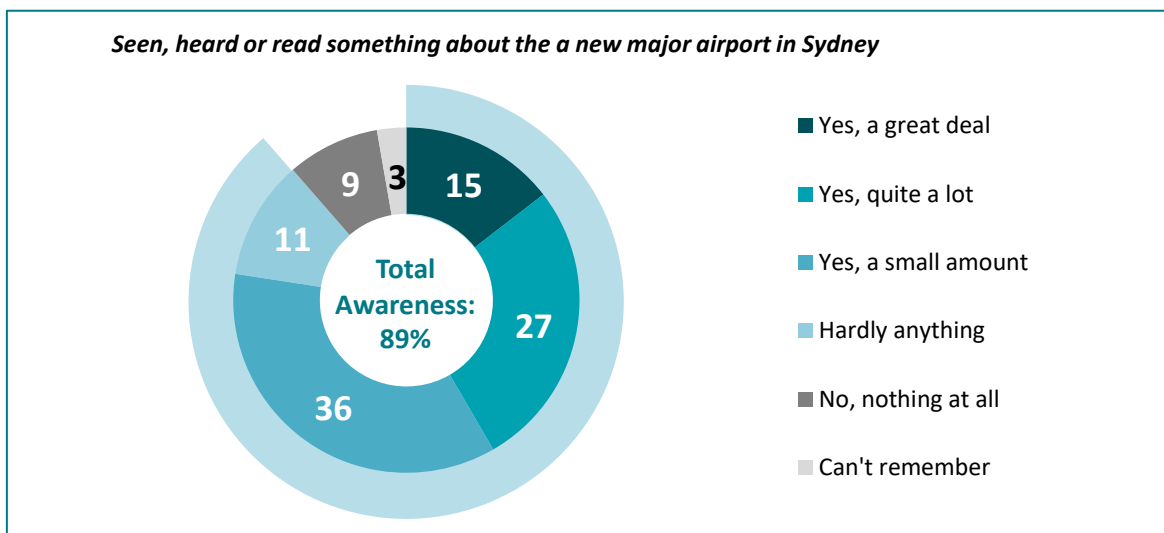
Base: Those who provided a rating of 6-10 rating of importance in being informed of the airport's development (n=401)

5 Other Measures

5.1. Awareness of the Western Sydney Airport

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

Figure 15: Awareness of a new major airport in Sydney (Sep-Oct 2017)



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

Base: All (n=615)

Key differences among the demographic groups in September-October 2017 were for male residents (19%) and those aged 55 years and over (22%) to be more likely to consider they knew 'a great deal' (Table 19). Residents in Inner West region were now the most likely to hold such a view. There were no further confirmed differences between the regions.

Table 19: Awareness of a new major airport in Sydney, by demographics (Sep-Oct 2017)

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	89	88	89	84	89	93	89	93	91	84	85	91
Great deal	15	19	11	13	10	22	14	23	16	11	11	16
Quite a lot	27	25	29	25	27	30	25	20	27	31	23	29
Small amount	36	34	38	33	37	37	40	41	34	33	38	35
Hardly anything	11	11	12	13	16	4	10	9	15	9	13	11
Nothing at all	9	9	8	11	8	7	9	6	7	11	9	8
Unsure/NA	3	3	3	5	3	0	2	1	2	5	5	1
Sample size	615	311	304	185	238	192	152	151	162	150	167	432

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

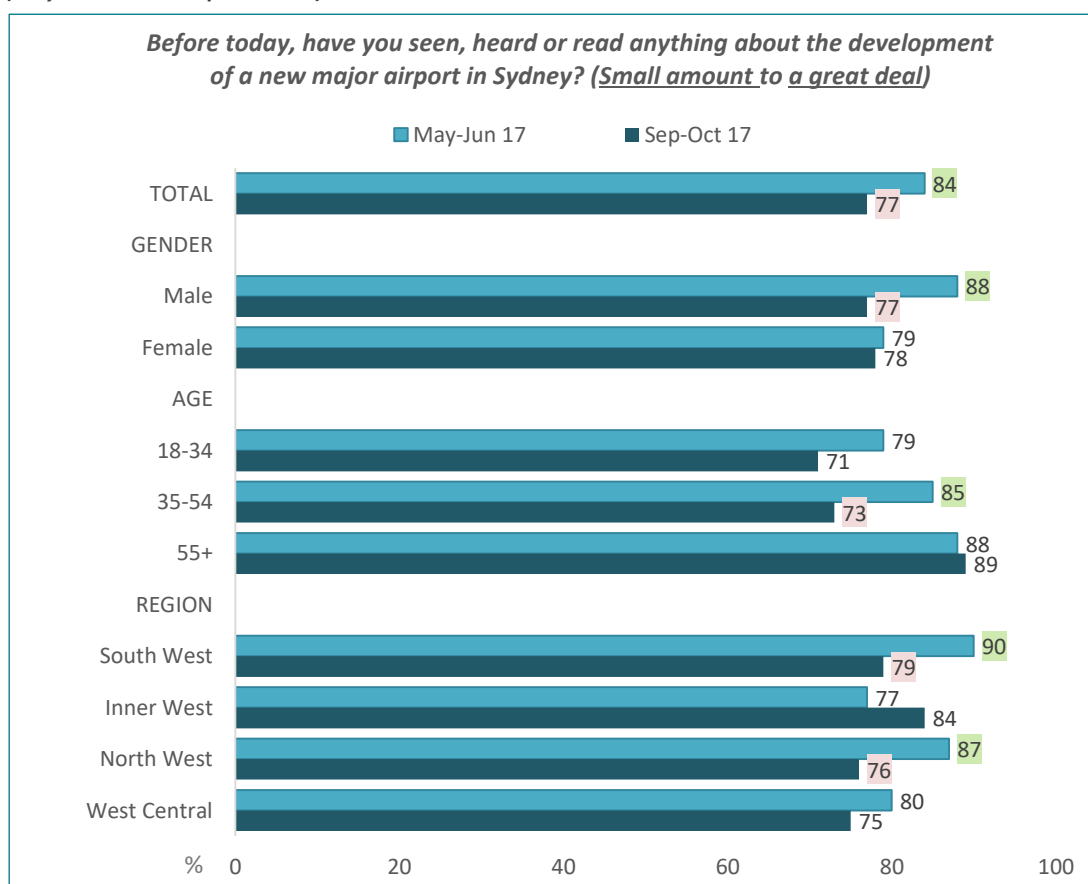
Base: All (n=615)

Shading highlights statistically significantly higher and lower results between groups

There was a small decrease from May-June 2017 in the proportion of residents saying they had heard 'quite a lot' or 'a great deal' about the airport (from 48% to 42%). The decrease was primarily in South West region (from 51% to 39%) and North West region (from 53% to 42%).

Focusing on the incidence of knowing at least 'a small amount' confirmed some overall decrease in knowledge about the airport in September-October 2017 (down from 84% in May-June 2017 to 77%), although the incidence remained high. The decrease was primarily among male residents and those aged 35-54 years (Figure 16). The decrease was also more strongly evident in South West and North West regions, while Inner West region differed from the other regions by recording a non-significant increase.

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



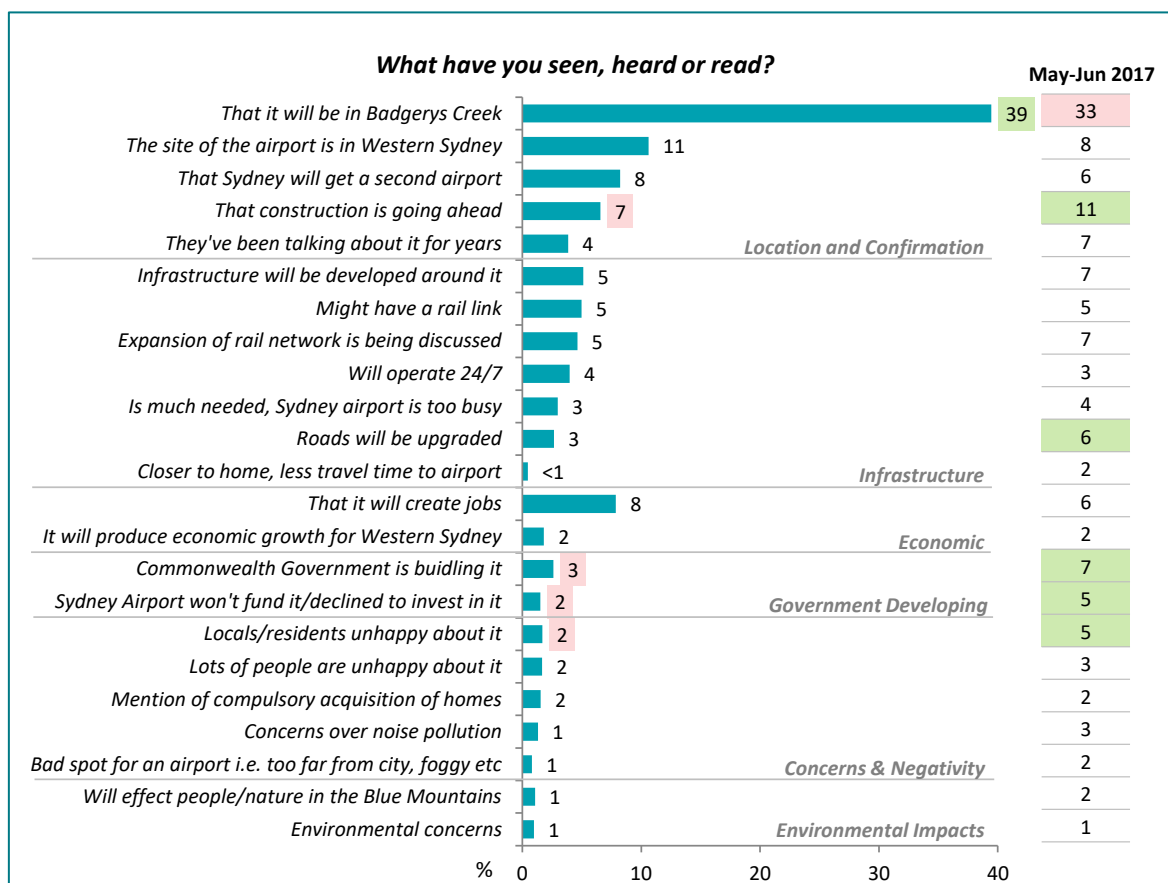
Q1. Before today, have you seen, heard or read anything about the development of a new major airport in Sydney?

Base: All (Sep-Oct 17, n=615; May-Jun 17, n=1,244, Dec 2016, n=503)

Shading highlights statistically significantly higher and lower results between groups

Residents who were aware of a new major airport in Sydney were asked, unprompted, what they had heard about the development. Around three-fifths of these residents in both the May-June 2017 and September-October 2017 surveys mentioned something about the location of the airport or that it was going ahead. This category included over one-third (39%) in the latest survey specifically mentioning Badgerys Creek—higher than in the earlier survey (33%)—with other details surrounding the development continuing to relatively low (Figure 17). Some detail about infrastructure and development was mentioned by one-fifth (20%), including the potential expansion of a rail network to the airport (5%) and that roads would be upgraded in the surrounding area (3%). Less than one in ten (6%) mentioned a top-of-mind concern or negative aspect of the development, lower than in the earlier survey (12%).

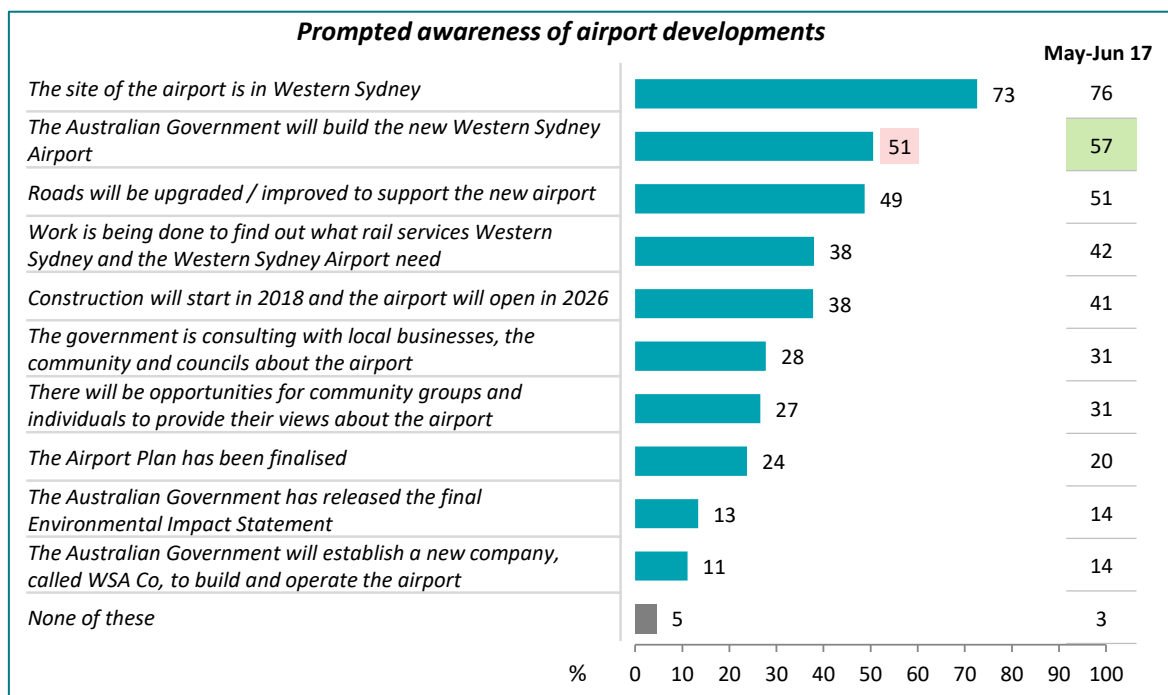
Figure 17: Unprompted awareness of the new airport's developments



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

Base: Those who have seen, heard or read anything about the development of a new major airport in Sydney (n=553)

Figure 18: Prompted awareness of the new major airport's developments (Sep-Oct 2017)



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

Base: Those who have seen, heard or read anything about the development of a new major airport in Sydney (n=553)

When asked about particular aspects of the new major airport in Sydney, around three-quarters (73%) in September-October 2017 indicated that they knew the site of the new airport would be in Western Sydney (Figure 18). Around half (51%) were aware that the Australian Government would be building the new airport, although this was lower than in the May-June 2017 survey (57%). A similar proportion (49%) were also aware that roads would be upgraded to support the new airport.

Residents continued to be much less aware that the Environmental Impact Statement had been released (13%), or that the Australian Government will establish a new company, called WSA Co, to build and operate the airport (11%).

There were no overall increases in awareness of any aspects compared with that earlier survey.

Prompted awareness of these developments continued to be relatively uniform across regions (Table 20). Residents in North West region were more aware in May-June 2017 that the site would be in Western Sydney (84%). This level of awareness decreased in the current wave (69%) to be similar to the other regions (68-78%). Other decreases also occurred in North West region: about construction dates and about WSA Co being set up to build and operate the airport.

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

Heard of developments	REGION							
	Sep-Oct 2017				Statistically significant change from May-Jun 2017			
	South West	Inner West	North West	West Central	South West	Inner West	North West	West Central
	%	%	%	%	%	%	%	%
The site of the airport is in Western Sydney	74	68	69	78	-	-	-14	-
The Australian Government will build the new Western Sydney Airport	63	49	49	46	-	-	-	-
Roads will be upgraded / improved to support the new airport	56	40	50	48	-	-	-	-
Work is being done to find out what rail services Western Sydney and the Western Sydney Airport need	42	34	37	38	-	-	-	-
Construction will start in 2018 and the airport will open in 2026	41	38	31	42	-	-	-15	-
The government is consulting with local businesses, the community and councils about the airport	26	31	31	24	-	-	-	-
There will be opportunities for community groups and individuals to provide their views about the airport	24	32	28	24	-	-	-	-
The Airport Plan, a document that outlines and authorises the development and operation of a new single-runway airport at Badgerys Creek, has been finalised	21	26	26	22	-	-	-	-
The Australian Government has released the final Environmental Impact Statement	12	15	15	12	-	-	-	-
The Australian Government has established a new company, called WSA Co, to build and operate the airport	8	13	8	15	-	-	-11	-
None of these	1	3	7	4	-	-	-	-
Sample size	137	139	147	130				
Highlighting statistically significantly higher and lower results:				between regions in Sep-Oct 2017	comparing each region with May-Jun 2017			

Q3. Which of the following aspects of the development of a new major airport in Sydney have you personally heard about before today?
Base: Those who have seen, heard or read anything about the development of a new major airport in Sydney (n=553)

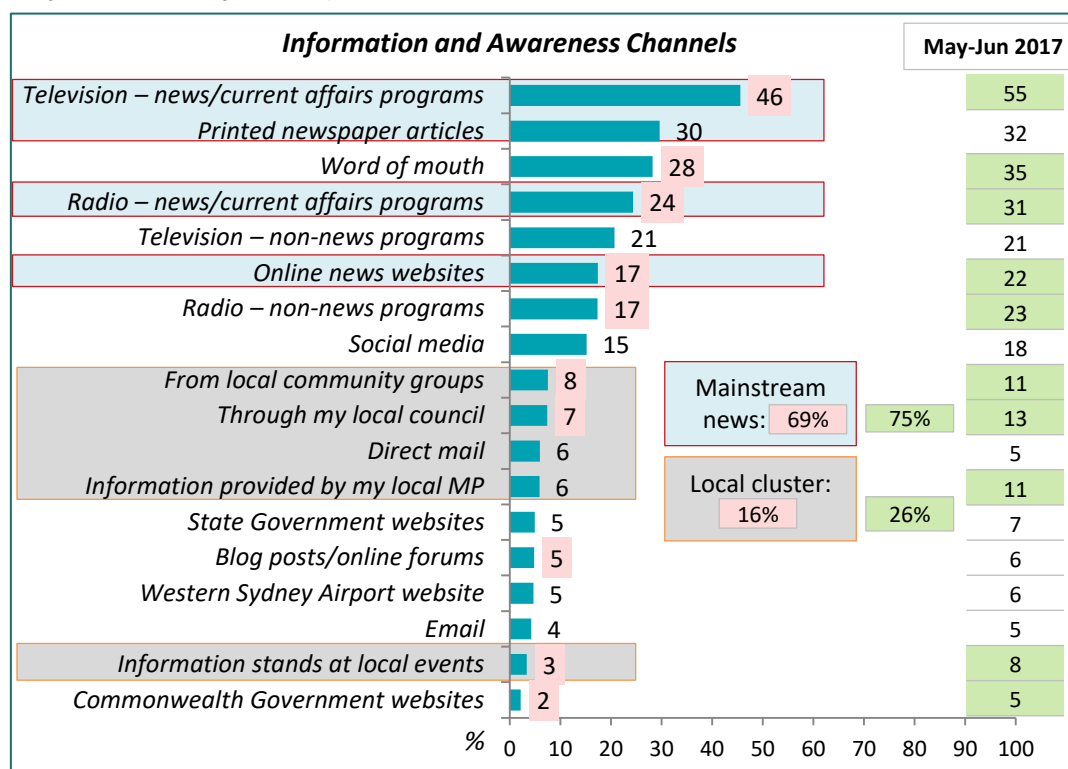
5.2. Sources of Information

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. There was a decrease in the current wave compared with May-June 2017 in the nomination of most of the channels, including most of the more common, mainstream media channels; and through word of mouth (Figure 19). The overall pattern suggests a decrease in overall coverage of the new airport in both traditional media and some local communications channels.

The most common individual channel was, again, television news/current affairs, nominated by around half (46%) of this group of residents, although declining from May-June 2017 (55%). Overall, mainstream news channels were nominated by over two-thirds (69%), lower than in the earlier survey (75%); while the cluster of local channels also decreased (from 26% to 16%).

Nomination of a Commonwealth Government website or the Western Sydney Airport website remained relatively low (6% vs. 9% in the earlier survey).

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



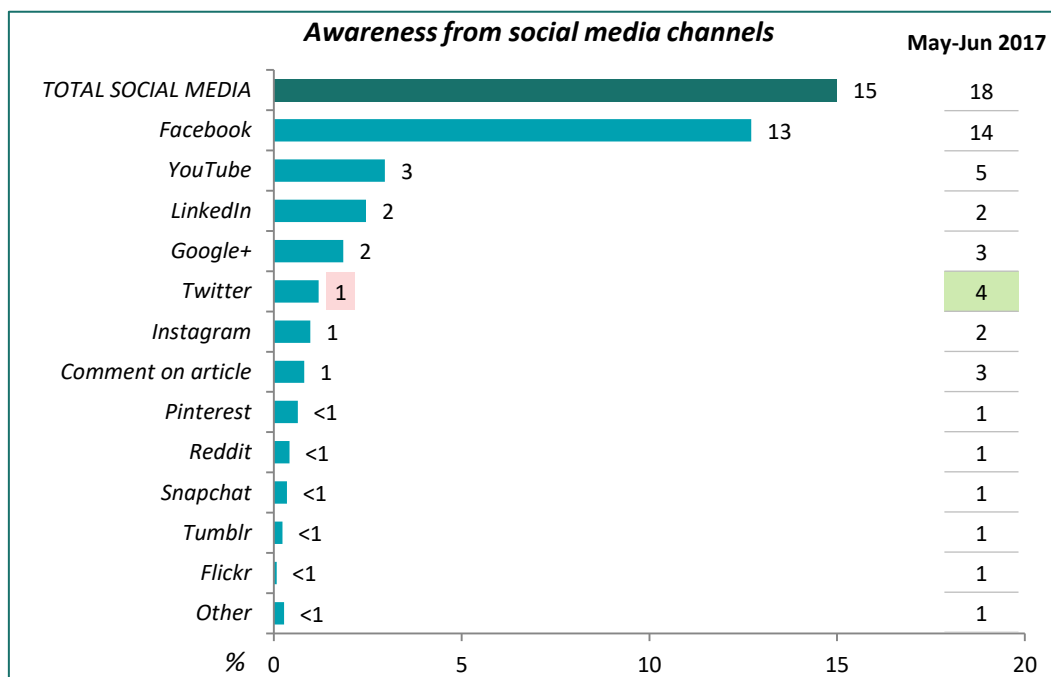
Q4. Where have you seen, heard or read anything about the development of a new major airport in Sydney?

Base: Those who have seen, heard or read anything about the development of a new major airport in Sydney (n=553)

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

A minority (15%) of residents aware of the new airport had been exposed to information on a social media site, similar to the May-June 2017 (18%). Facebook (13% of those aware) was again the most prominent channel, similar to the earlier survey (14%); while nomination of Twitter decreased (from 4% to 1%) (Figure 20).

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



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

Key differences between demographic groups in September-October 2017 were that access to information through traditional television, radio and newspaper channels increased with age; and that males were more likely to access newspaper articles and online news websites (Table 21).

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

Channel s	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	%	%	%	%	%	%	%	%	%	%	%	%
News/mainstream media												
Television – news/ current affairs programs	46	46	45	28	44	66	55	47	46	40	33	51
Printed newspaper articles	30	35	24	16	27	47	28	34	30	28	23	32
Radio – news/current affairs programs	24	25	23	13	23	37	24	29	23	24	15	28
Television – non-news programs	21	21	20	14	20	29	21	22	17	24	19	21
Radio – non-news programs	17	17	18	9	10	35	15	17	17	19	8	21
Online news websites	17	24	11	19	20	13	17	24	13	19	23	15
Other channels - 15+% awareness												
Word of mouth	28	25	31	30	31	24	40	25	27	25	32	27
Social media	15	14	17	18	17	10	13	13	19	14	17	15
'Local cluster' (any in category)	16	15	18	16	17	16	16	12	18	17	13	18
Sample size	553	281	272	159	216	178	137	139	147	130	147	395

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=553)
 Highlighting statistically significantly **higher** and **lower** results between groups

As in the May-June 2017 survey, residents from a culturally and linguistically diverse background were more likely to access information from online news websites and less likely to access information through some of the traditional channels—in particular television and radio (Table 21). Part of the relationship with television and radio channels was influenced by age profile, as the culturally and linguistically diverse residents were on average younger, but the overall trends associated with cultural background were still evident.

Residents in South West region were also the most likely to refer to word of mouth as a source of information (40% vs. 25-27% in the other regions), which is likely to reflect local discussion given that the airport is being built in that region (Table 22). In the May-June 2017 survey, residents in North West region had been more likely to nominate accessing information through local channels. However, these channels had declined significantly in September-October 2017.

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

Channels	REGION							
	Sep-Oct 2017				Statistically significant change from May-Jun 2017			
	South West	Inner West	North West	West Central	South West	Inner West	North West	West Central
	%	%	%	%	%	%	%	%
Television – news/current affairs programs	55	47	46	40	-	-	-	-12
Printed newspaper articles	28	34	30	28	-	-	-	-
Radio – news/current affairs programs	24	29	23	24	-12	-	-10	-
Television – non-news programs	21	22	17	24	-	-	-	-
Radio – non-news programs	15	17	17	19	-	-	-	-
Online news websites	17	24	13	19	-	-	-10	-
Word of mouth	40	25	27	25	-	-	-	-
Social media	13	13	19	14	-	-	-	-
Through my local council	8	4	9	7	-9	-	-12	-
From local community groups	7	5	7	9	-	-	-12	-
Information provided by my local MP	7	4	8	5	-	-	-10	-
Information stands at local events	3	3	6	1	-	-	-7	-4
Sample size	137	139	147	130				
Highlighting statistically significantly higher and lower results:	between regions in Sep-Oct 2017				comparing each region with May-Jun 2017			

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

Base: Those who have seen, heard or read anything about the development of a new major airport in Sydney (n=553)

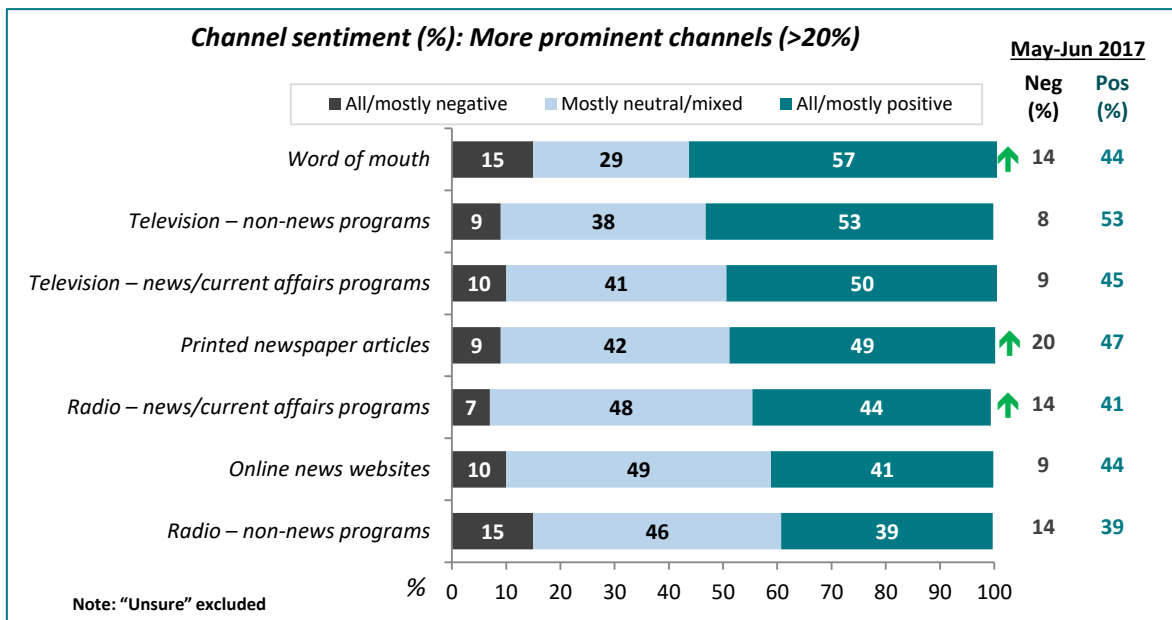
Showing main channels and lower incidence channels where changes occurred

5.3. Sentiment of Channel Content

Residents who had heard, seen or read something about the new major airport in Sydney were asked how positive or negative the content of the information had generally been over the last three months, for each source. For the major sources of information (nominated by at least 20%) in September-October 2017, the share of positive sentiment was in the range of 39% to 57%, while negative sentiment was a smaller share, in the range of 7% to 15% (Figure 21). Overall, word of mouth was the most likely to be positive (57%) but also had a relatively high negative incidence (15%). Sentiment of content had lifted significantly from May-June 2017 for:

- word of mouth, with positive sentiment increasing from 44% to 57%
- printed newspaper articles, with negative sentiment decreasing from 20% to 9%
- radio news/current affairs, with negative sentiment decreasing from 14% to 7%.

Figure 21: Sentiment of content of main communication channels (higher than 20% exposure) (Sep-Oct 2017 and comparison with May-Jun 2017)



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

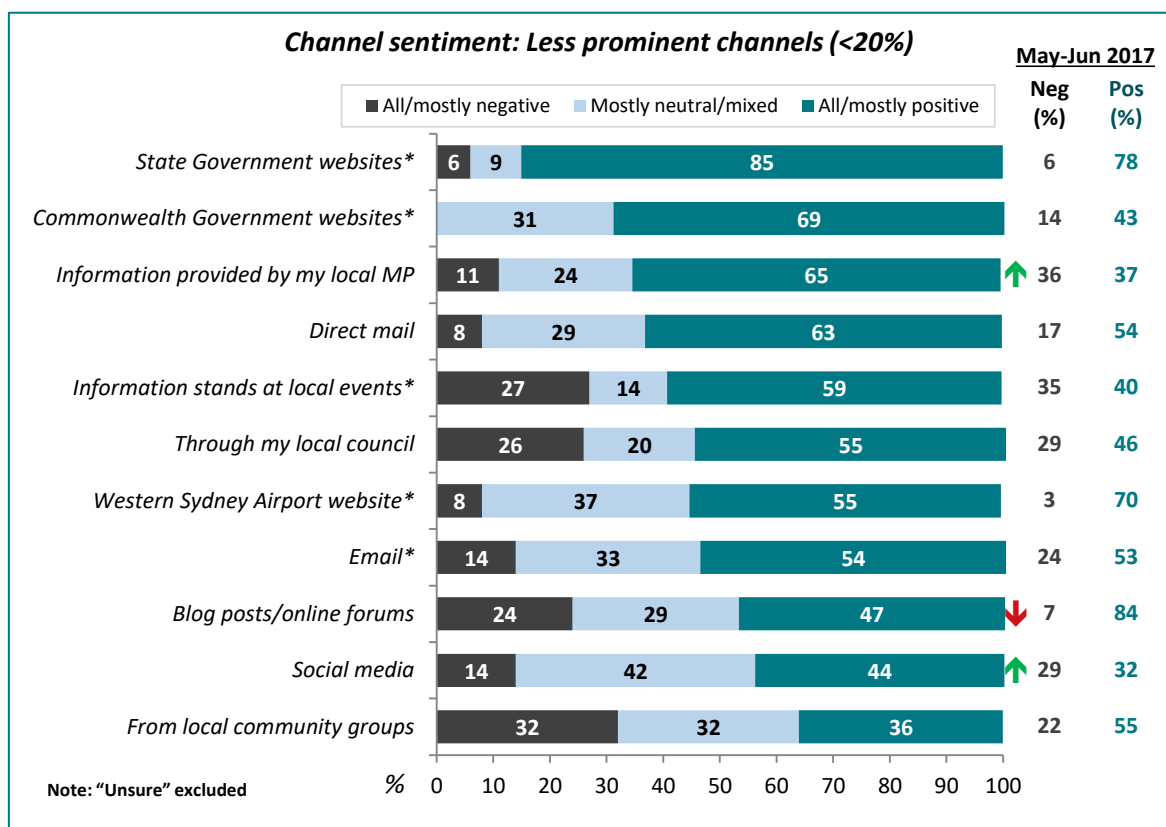
Base: Those who had seen, heard or read anything via the respective channel (n=90-247)

Highlighting a statistically significant improvement ↑ or decline ↓ in average sentiment

Figure 22 on the next page shows the sentiment ratings of the content for sources of information that were accessed by less than 20% of residents aware of the airport. Sources with sample sizes less than 30 are highlighted. Among the sources with higher sample sizes, information obtained from local community groups and blog posts/online forums had the most mixed sentiment, while local council also had a relatively high negative sentiment (26%). Average sentiment had become more positive for local MPs and social media compared with May-June 2017, becoming less polarised, while blog posts/online forums had become less positive and more negative.

Figure 23 on the next page shows a weighted average distribution of negative, neutral/mixed and positive sentiment for four overall categories of channels, ordered on decreasing number of ratings across residents aware of the development of the airport. Word of mouth has been included with local sources, giving a broad similarity in sentiment profile, although it does represent the largest share of ratings within the category.

Figure 22: Sentiment of content of other communication channels (lower than 20% exposure) (Sep-Oct 2017 and comparison with May-Jun 2017)



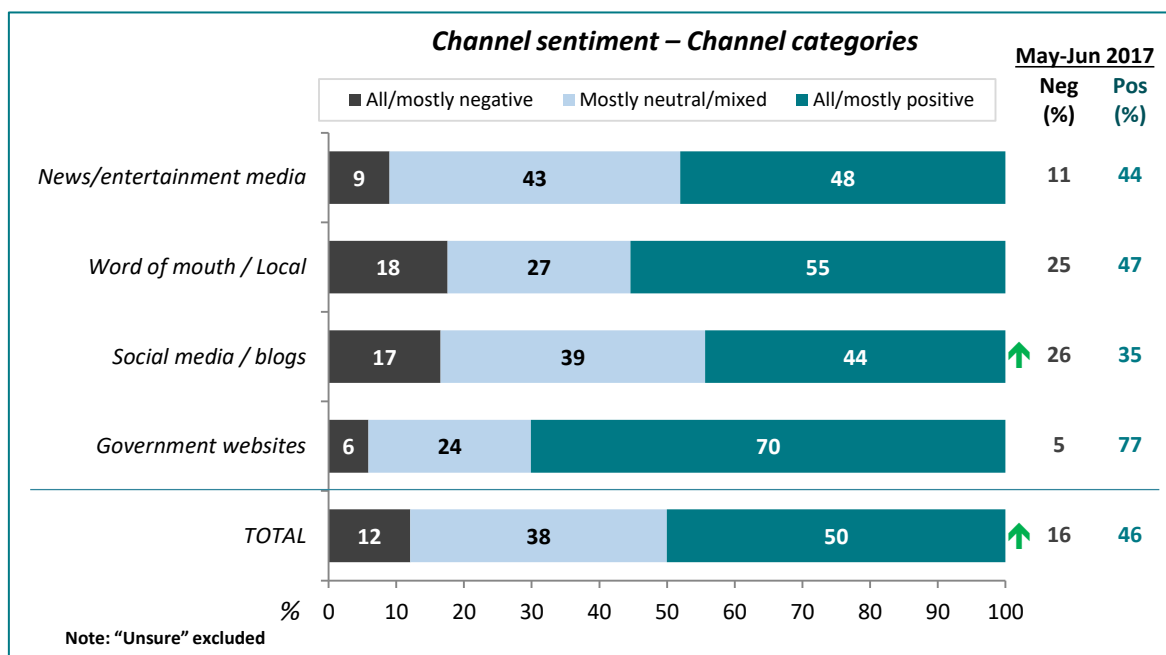
Q5. Thinking about the last three months, please select overall how positive or negative the content in the source below has been regarding the development of a new major airport in Sydney.

Base: Those who had seen, heard or read anything via the respective channel (n=12-83)

* Sample size less than 30

Highlighting a statistically significant improvement ↑ or decline ↓ in average sentiment

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



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

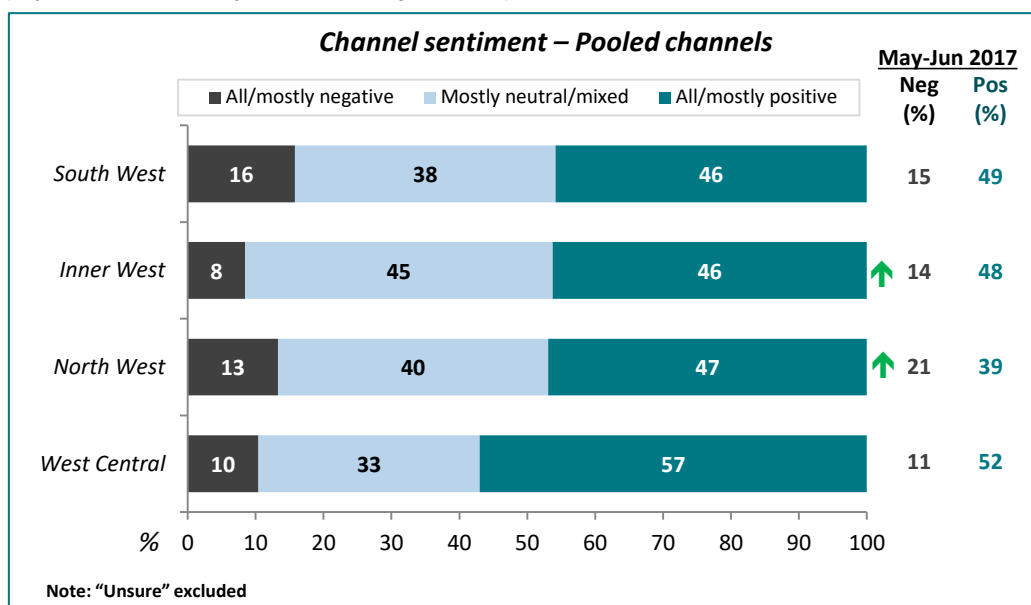
Base: Those who had seen, heard or read anything – channel categories (September-October 2017: n=65-906 ratings)

Highlighting a statistically significant improvement ↑ or decline ↓ in average sentiment

In September-October 2017, half of the information sources had positive sentiment, with a small minority (12%) negative (Figure 23). There was some improvement in sentiment from May-June 2017, specifically a drop in negative sentiment (from 16%), shifting to neutral/mixed. Government websites had the most positive sentiment, although with relatively low exposure. News/entertainment media had a low incidence of negative sentiment (9%). Social media/blogs had the most distributed sentiment profile, with a relatively high negative incidence (17%) and below average positive incidence (44%), and which was an improvement from May-June 2017 when the negative incidence was over one-quarter (26%). Word of mouth/local channels had a more polarised sentiment, with both above average negative incidence (18%) and positive incidence (55%).

Looking at the overall weighted profile across the regions, the most positive profile was found in West Central region (57% positive), although there was no significant change from May-June 2017 (Figure 24). The share of positive sentiment was over two-fifths in the other three regions, and there had been improvement in both Inner West region and North West region compared with the earlier survey: negative sentiment decreased in both regions, and positive sentiment increased in North West region. Negative sentiment was higher in South West region (16%) which has mostly unchanged from May-Jun 2017.

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



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

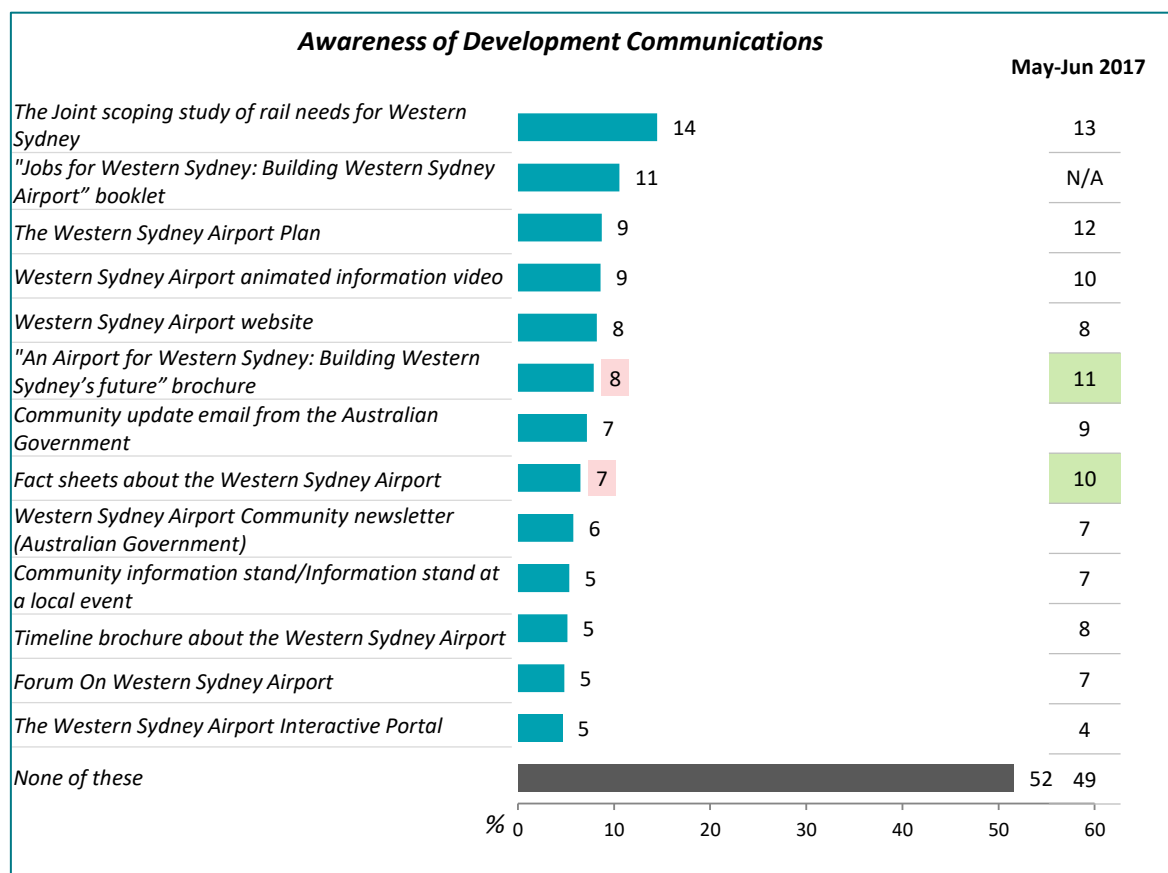
Base: Those who had seen, heard or read anything – ratings of all channels (September-October 2017: n=317-408 ratings)

Highlighting a statistically significant improvement ↑ or decline ↓ in average sentiment

5.4. Awareness of Government Initiatives and Communications

Residents aware of a new Western Sydney airport being developed were asked if they had seen or heard of any of a prompted list of Australian Government initiatives and communication releases. The online survey included images of the communications, while the telephone survey had extended descriptions to assist with recognition. Awareness of the initiatives and communications in September-October 2017 was in the range of 5% to 14%, with the highest result for the 'Joint scoping study of rail needs for Western Sydney (14%) (Figure 25). This initiative was the highest nominated in all four regions (Table 23).

Figure 25: Awareness of Australian Government initiatives and communications (Sep-Oct 2017)



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

Base: Those who have seen, heard or read anything about the development of a new major airport in Sydney (n=553)

In September-October 2017, the only significant difference between the regions in awareness of the initiatives and communications measured was for residents in North West region to be more likely to report awareness of 'community information stand or information stand at a local event' (9% vs. 3%–5% in the other regions) (Table 23). In May-June 2017, overall awareness of initiatives and communications was lower in Inner West region (60% recalled none of the initiatives vs. 46%–49% in the other regions). Overall awareness was now more similar between the regions.

Further changes from May-June 2017 occurred in North West region, with decreases in:

- 'Fact sheets about the Western Sydney Airport' (from 13% to 6%)
- 'Timeline brochure about the Western Sydney Airport' (from 9% to 4%).

Table 23: Awareness of initiatives and communications from the Australian Government, by region (Sep-Oct 2017)

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>	14	14	16	15	13
<i>"Jobs for Western Sydney: Building Western Sydney Airport" booklet</i>	11	7	12	14	9
<i>The Western Sydney Airport Plan</i>	9	8	6	12	7
<i>Western Sydney Airport animated information video</i>	9	10	7	10	7
<i>Western Sydney Airport website</i>	8	7	11	9	7
<i>"An Airport for Western Sydney: Building Western Sydney's future" brochure</i>	8	9	10	9	5
<i>Community update email from the Australian Government</i>	7	8	8	6	7
<i>Fact sheets about the Western Sydney Airport</i>	7	6	8	6	7
<i>Western Sydney Airport Community newsletter (Australian Government)</i>	6	7	6	6	4
<i>Community information stand/Information stand at a local event</i>	5	3	5	9	3
<i>Timeline brochure about the Western Sydney Airport</i>	5	8	4	4	5
<i>Forum On Western Sydney Airport</i>	5	4	5	6	4
<i>None of these</i>	52	52	51	47	56
<i>Sample size</i>	553	137	139	147	130

Base: Those who have seen, heard or read anything about the development of a new major airport in Sydney (n=553)

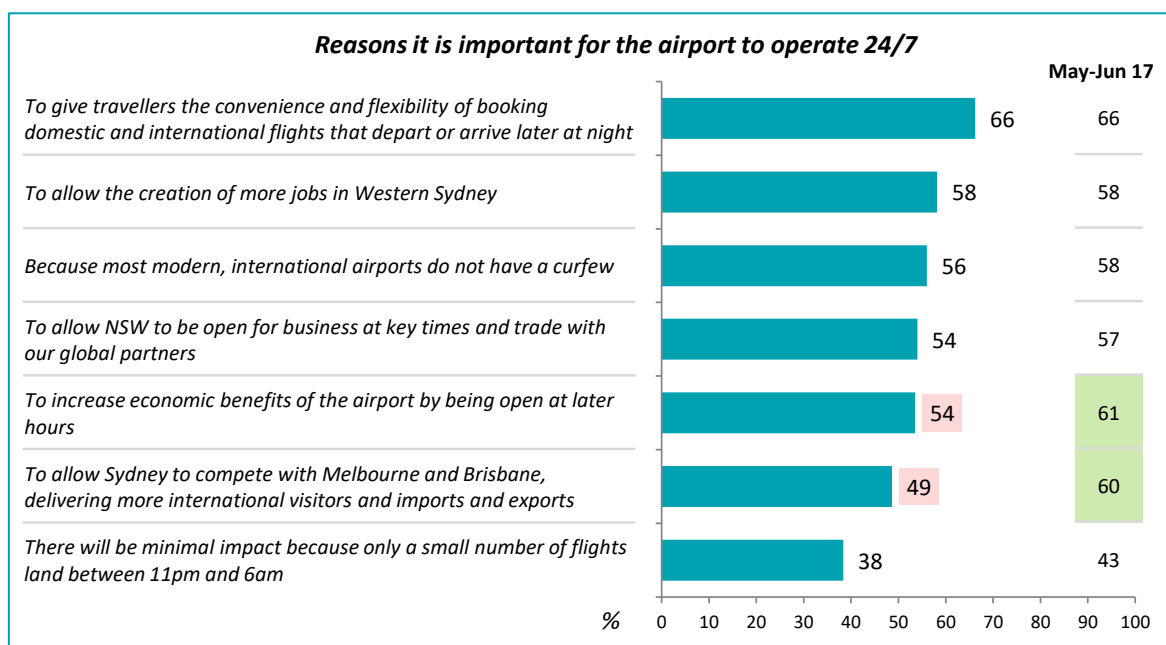
Q6. Which of the following initiatives and communications from the Australian Government about the new airport at Badgerys Creek have you seen or heard about before today?

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 declined in September-October 2017. Residents who indicated at least some importance (rating of 6-10) were asked to select reasons why. Two-thirds (66%) continued to nominate most the importance of giving travellers the convenience and flexibility of booking flights that arrive or depart at a later time, followed by job creation (58%) (Figure 26). While almost all the reasons were nominated by about half or more of this group, there were some declines in nomination of economic benefits (down from 61% to 54%) and allowing Sydney to compete with Melbourne and Brisbane (down from 60% to 49%).

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



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

Base: Rated 6-10 on importance of Western Sydney Airport to not be restricted by a curfew (n=310)

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

As the incidence of residents nominating operating 24 hours a day, 7 days a week as important was relatively low, the reasons nominated by residents within each region were averaged over the May-June 2017 and September-October 2017 surveys to give more stable results for comparison between the regions (Table 24). The results were relatively uniform across the regions, with the only significant difference being lower nomination of job creation in Western Sydney by residents in Inner West region (47% vs. 59% to 61%), possibly reflecting the lower engagement of this region with Western Sydney.

Residents who rated importance 0-4 for operation 24 hours a day, 7 days a week, were asked to provide reasons why. The reasons again fell into four main categories, which were similarly nominated in both May-June 2017 and September-October 2017 (Figure 27). In September-October 2017:

- close to half (45%) of this group of residents nominated a concern about noise, including over a quarter (28%) saying that it would create too much noise generally
- over two-fifths (42%) mentioned a reason on not being necessary to operate without a curfew
- over one-third (36%) referred to a negative impact or being unfair on the community

- the smallest topic area (6%) was about other impacts on the environment.

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

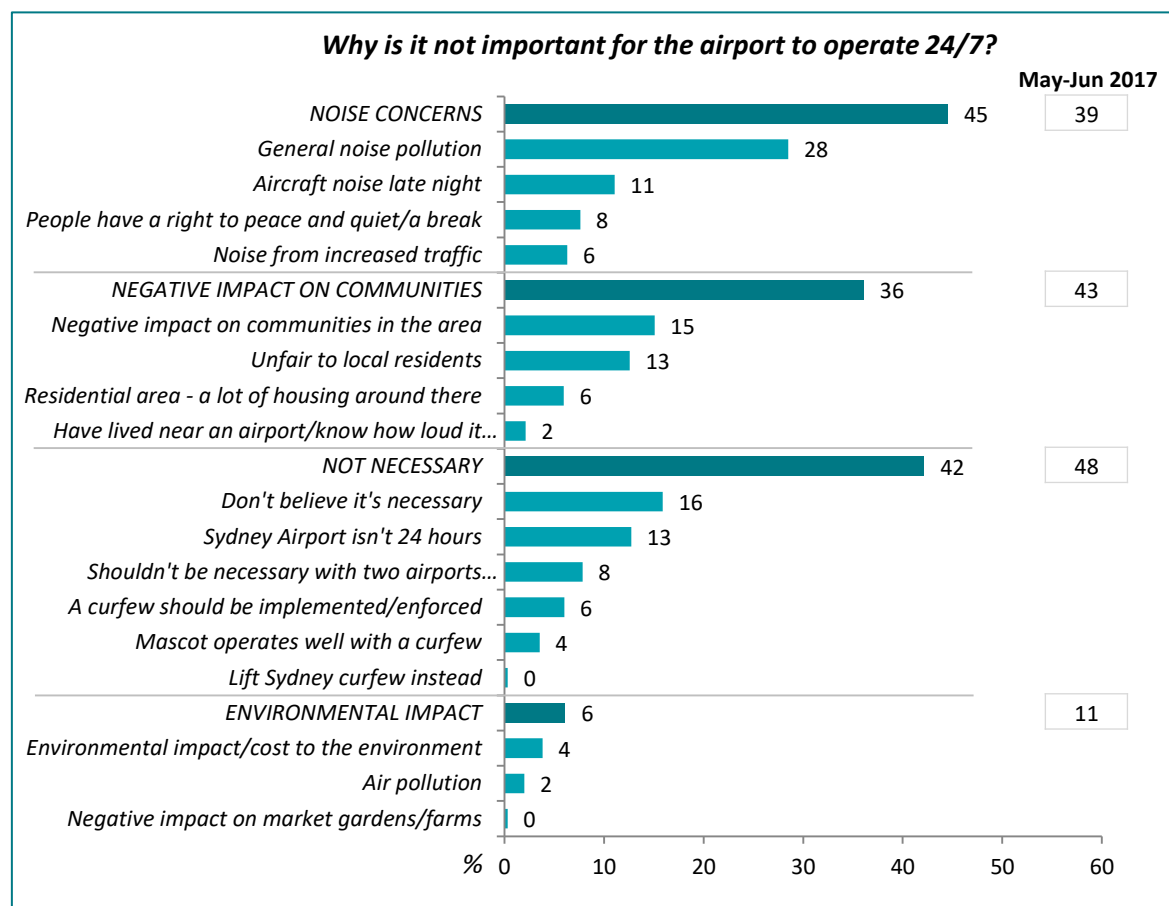
Heard of developments	Average of May-Jun 2017 and Sep-Oct 2017			
	South West	Inner West	North West	West Central
	%	%	%	%
To allow Sydney to compete with Melbourne and Brisbane, delivering more international visitors and imports and exports	54	55	56	53
To increase economic benefits of the airport by being open at later hours	57	58	59	56
To allow NSW to be open for business at key times and trade with our global partners	57	56	57	54
To allow the creation of more jobs in Western Sydney	60	47	61	59
Because most modern, international airports do not have a curfew	59	57	55	58
There will be minimal impact because only a small number of flights land between 11pm and 6am	40	44	41	39
To give travellers the convenience and flexibility of booking domestic and international flights that depart or arrive later at night	54	55	56	53
Sample size	169	188	271	295

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

Base: Those who provided a rating of 6-10 in agreeing that it is important for Western Sydney Airport to not be restricted by a curfew – average of May-June 2017 and September-October 2017 results (n=923)

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 (Sep-Oct 2017)



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

Base: Those who rated 0-4 in disagreeing that it is important for Western Sydney Airport to not be restricted by a curfew (n=181)

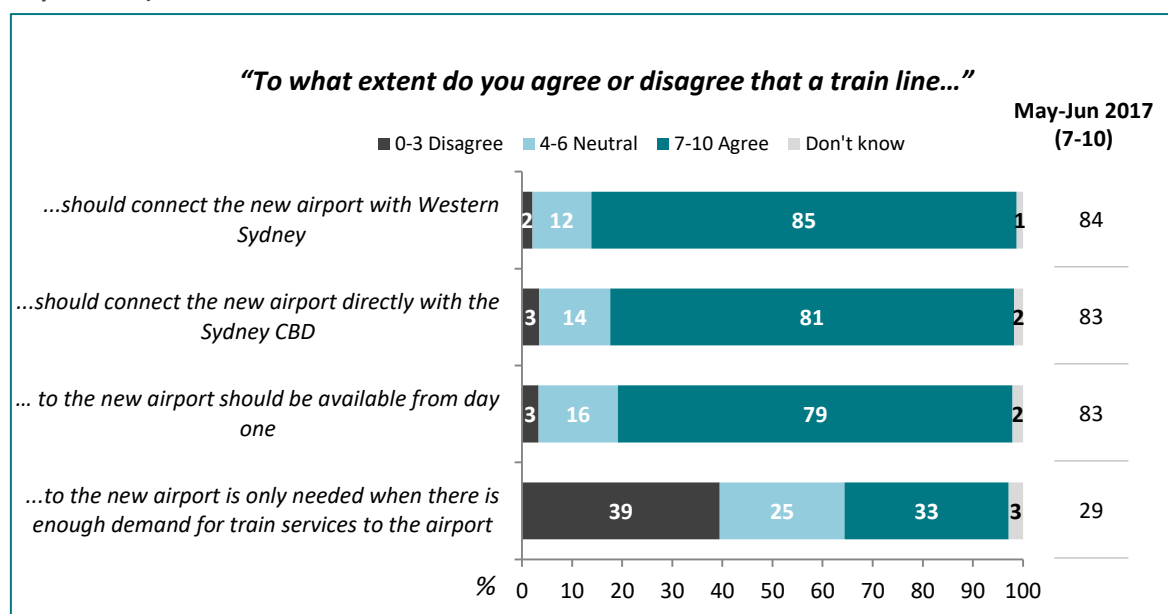
5.6. Rail Link

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

- *should connect the new airport with Western Sydney* (85%)
- *should connect the new airport directly with the Sydney CBD* (81%)
- *to the new airport should be available from day one* (79%).

Each of these statements had very low proportions (2-3%) of residents disagreeing (rating 0-3). Compared with these statements, there was less agreement (33%) and more disagreement (39%) with the statement that *a train line to the new airport is only needed when there is enough demand for train services to the airport*. This statement, being less definitive and specific in nature, was met with a more balanced set of responses.

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



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

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

Comparing perceptions of the rail link across the regions showed relatively uniform strong agreement on the first three statements about connection and availability (Table 25). There were some differences on perception of the rail link only being needed when there is enough demand. Residents in West Central region were the most in agreement (40%); and residents in North West region were the least in agreement (25%).

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

Agreement	REGION							
	Sep-Oct 2017				Statistically significant change from May-Jun 2017			
	South West	Inner West	North West	West Central	South West	Inner West	North West	West Central
Rating 7-10	%	%	%	%	%	%	%	%
...should connect the new airport with Western Sydney	84	85	84	86	-	-	-	-
...should connect the new airport directly with the Sydney CBD	82	82	79	81	-	-	-	-
...to the new airport should be available from day one	83	79	80	76	-	-	-	-
...to the new airport is only needed when there is enough demand for train services to the airport	30	37	25	40	-	+13	-	-
Sample size	152	151	162	150				
Highlighting statistically significantly higher and lower results:	between regions in Sep-Oct 2017				comparing each region with May-Jun 2017			

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

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

6 Conclusions and Recommendations

6.1. Conclusions

Awareness of Western Sydney Airport

In September-October 2017, a large majority (89%) of Western Sydney residents had seen or heard something about the development of a new major airport, with around two-fifths (42%) saying they had heard 'quite a lot' or 'a great deal' about it. The latter figure was lower than in the benchmark survey in May-June 2017 (48%), declining in particular in South West region and North West region. A key topic mentioned spontaneously as being seen or heard about the airport was confirmation of construction, particularly the location at Badgerys Creek, similar to the earlier survey. When prompted, the majority of those aware of the airport had heard that the site is in Western Sydney (73%); the Australian Government is building the airport (51%), with some decrease from the benchmark (57%); and roads will be improved to support the new airport (49%).

The pattern for an overall decrease in awareness can be influenced by genuine 'forgetting' of a topic several months after exposure; an expectation of hearing more detailed information about progress after the earlier announcement; and thinking about only recent exposure in response to the question, which would then be influenced by the level of recent media and other activity.

Key measures of community sentiment

There had been some increases in May-June 2017 in positive sentiment towards the airport on key measures of *favourability* and *positive benefits outweighing any negative impacts*, with the majority of the residents of Western Sydney holding a positive position on each (67% and 60% respectively). These increases were maintained in September-October 2017 (64% and 63%). Positive sentiment had increased particularly in South West and West Central regions, and this continued into the current wave. Positive sentiment was at a similar level across the regions on both these measures, with no more than one in eight holding a negative position.

There was also some decrease in May-June 2017 in *concern about a negative impact* of building the airport (down to 30% agreeing), which was also maintained at this level in the current wave (32%), along with a similar profile across the regions.

In contrast to the increase in 2017 in positive sentiment on the above measures, overall disagreement with the *importance of 24/7 operation* increased in May-June 2017 to around one-quarter (27%) of residents. This increase remained in September-October 2017 (25%), with the profile being similar across the regions. Close to half (47%) agreed on the importance, but the community continued to show some indecision on the issue, with over one-quarter (28%) being either neutral or unsure of its importance.

Perceived barriers and motivators

Concerns

Important areas of concern among Western Sydney residents continued to encompass traffic, noise and other environmental impacts. Average levels of concern in May-June 2017 had been higher in South West region and lower in Inner West region. Overall shifts in September-October 2017, particularly increases in concern on several issues in Inner West region and marginal decreases in South West region, resulted in relative uniformity across the regions. Over half of residents overall

expressed concern in September-October 2017 about several issues presented, similar to the earlier survey:

- increase in traffic both during construction (53%) and once running (53%)
- noise late at night and early in the morning if the airport operates 24 hours a day (53%)
- general noise pollution once running (51%).

Benefits

Key benefits of a new airport in Western Sydney that were acknowledged by two-thirds or more of residents in both the May-June and September-October 2017 waves encompassed economic gains for the area and Sydney's global competitiveness:

- will bring jobs to the region (76% in September-October 2017)
- needed to support the current airport at Mascot (72%)
- necessary to maintain and grow Sydney's global competitiveness (70%)
- will boost business and tourism in Western Sydney (68%)
- necessary to support Western Sydney's growing population and economy (68%).

Relationship with favourability of the airport

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

Informing the community

The majority (57%) of Western Sydney residents in September-October 2017 continued to see it as very important to be informed about progress of the Western Sydney Airport, with less than one in ten (7%) considering it of low importance. Importance in South West region had declined from the earlier survey (from 66% to 54%), with a corresponding increase in a neutral/unsure position. The current profile of importance was very similar across the regions. The decline in South West region might indicate some dissipation of strong interest following the initial announcement of the development of the airport in the local area.

The top three unpaid channels in September-October 2017 for information about the airport's development, among those perceiving some importance, included media coverage (nominated by 60%), a website dedicated to the airport (34%) and social media (32%). Nomination of a website had declined overall from the earlier survey (41%), particularly in North West region. There were several reductions in overall nomination of channels, and in the average number selected in South West, North West and West Central regions. In contrast, the average number increased in Inner West region.

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

6.2. Recommendations

The core recommendations from the May-June 2017 benchmark continue to be relevant following the September-October 2017 wave.

Key findings	Recommendations
Understand current levels of awareness and sources of information for Western Sydney Airport	
<ul style="list-style-type: none"> The large majority of residents were aware of the airport, although there was some decline in those considering they knew at least 'quite a lot'. There is scope to increase knowledge progressively and, importantly, to maintain knowledge, particularly as further developments in construction etc. occur. Awareness was strongest about the site being in Western Sydney, that the Australian Government is building the airport, and that roads will be improved to support the airport. Most information is reported to come from mainstream media including television, print newspapers and radio; and word of mouth. 	<ul style="list-style-type: none"> Utilising media releases and other promotional activity which can be reported in news programs and articles provides the potential to reach the general population effectively, and maintain awareness and knowledge of the development. Such activity can generate, and be built on, by word of mouth communication. Awareness of such a major infrastructure development can generate the expectation of hearing more information, and there is an opportunity to build stronger positive sentiment and understanding of benefits.
Explore current levels of community perceptions of the airport	
<ul style="list-style-type: none"> Improvements have been maintained in positive sentiment towards the new airport, including the level of favourability and benefits outweighing negative impacts, as well as some decline in concern about a negative impact. An increase in disagreement with the importance of the airport operating 24/7 has continued. Strong interest and expectation for a rail link was expressed, including operation from 'day one'. 	<ul style="list-style-type: none"> Communications should include Information about the necessity of 24/7 operation, and how issues associated with noise are being addressed. Information about the realistic implementation of a rail link, including the investment required to build it, should be communicated to 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 has some concern that the airport will have a negative impact on the region. Key areas of concern were associated with increase in traffic, noise and other environmental impacts, both during and after construction. 	<ul style="list-style-type: none"> Communications should provide information about the expected benefits to the economy infrastructure in the area, and to the broader benefits for Sydney, particularly based on results of similar infrastructure development. Communications should also include results of the final Environmental Impact Statement and other reports which

<ul style="list-style-type: none">• Key benefits were economic gains for the area, including jobs and business/tourism and 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.	provide factual, evidence-based information about impacts, and the steps being taken to address them.
Identify preferred (unpaid) channels for communication	
<ul style="list-style-type: none">• A dedicated airport website continues to be well-received as a source of information, but reported use has been very low.• Other preferred channels include local councils and social media.	<ul style="list-style-type: none">• A cost-effective way to promote the website should be developed, potentially through social media or in co-operation with councils.

7 Appendix

The table below shows the nominal 95% confidence interval for different sample sizes, based on a survey result of 50%, 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