



Australian Government

**Department of Infrastructure, Transport,
Cities and Regional Development**



Department of Infrastructure, Transport, Cities and Regional
Development

***Western Sydney International (Nancy-Bird Walton) Airport
Evaluative Research***

March–April 2019

Final Report

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1. Executive Summary

1.1. Background

The Strategic Communications and Engagement Section within the Western Sydney Unit (WSU) in the Department of Infrastructure, Transport, Cities and Regional Development (the department) is responsible for implementing its Western Sydney Airport Project Communications and Stakeholder Engagement Strategy (the Strategy). As WSU continues its work after a number of significant milestones – the determination of the Western Sydney Airport Plan, the announcement that the Australian Government will deliver and invest in the Western Sydney International (Nancy-Bird Walton) Airport (the airport), and the establishment of Western Sydney Airport (WSA, formerly known as WSA Co) as the organisation responsible for building the airport – WSU’s communications tasks will continue to be guided by the Strategy. This comprehensive engagement program for the Western Sydney Airport project also covers related activities such as Western Sydney Rail and the Western Sydney City Deal (the City Deal).

It is vital that WSU be agile and responsive to the community’s needs and desire for information about the project, including their preferences for how information is received. This is of growing importance given the construction of the airport commenced in late 2018. The program of research conducted by AMR will help guide WSU’s communication and engagement with its various stakeholder groups. The full research program comprises quantitative online surveys, media analysis and qualitative group discussions.

This document provides the research findings and recommendations for the quantitative phase in this evaluative research program. A new benchmark for the quantitative research was conducted in March-April 2019.

1.2. Research Objectives

Key research objectives for the quantitative research surveys were to:

- Understand current awareness levels and sources of information about Western Sydney International Airport.
- Identify the levels of awareness, attitudes and perceptions of Western Sydney residents around elements of the Western Sydney Airport Project, transport connections, Western Sydney Aerotropolis and the Western Sydney City Deal, and changes in these measures over time.
- Identify perceived barriers and motivators towards a positive sentiment.
- Identify preferred channels for communication.

1.3. Research Method

Quantitative research has been conducted in two previous series—from November 2014 to December 2016 and from May 2017 to June 2018—to evaluate communications activities and to understand awareness of and sentiment towards Western Sydney International Airport among residents of Western Sydney. A new survey series was launched in March-April 2019 to continue the evaluative research process with 1,008 residents of Western Sydney, and included both online and telephone survey methods to give a broad coverage of the area.

Western Sydney was divided into four regions for analysis, based on 2016 definitions of 17 local government areas:

- **South West:** Camden, Campbelltown, Liverpool, Wollondilly
- **North West:** The Hills, Blacktown, Blue Mountains, Hawkesbury, Penrith
- **Inner West:** Inner West, Burwood, Canada Bay, Strathfield
- **West Central:** Cumberland, Canterbury-Bankstown, Fairfield, Parramatta.

This report focuses on the results of the March-April 2019 survey and tracks key measures from previous waves.

1.4. Key Findings

Awareness of Western Sydney International Airport

A large majority (90%) of residents in March-April 2019 were aware of the development of a new major airport in Sydney.

- This overall incidence of awareness has remained within a relatively narrow range (87% to 91%) in surveys since May-June 2017. Close to half (45%) of residents considered they knew a lot about the airport, within the range measured since May-June 2017 (42-50%)
- Awareness of at least 'a small amount' about the airport was at a similar level in both May-June 2018 (83%) and in the current wave (82%), compared with May-June 2017 (84%), following announcement of the airport in the 2017 Federal Budget. This level of awareness was now marginally higher in South West region (89%) and North West region (85%) compared with West Central region (78%) and Inner West region (77%).

Source of information

A most successful channel in March-April 2019 as a source of information about the airport was mainstream **news sources**.

- A **news source** as a source of information was selected by two-thirds (66%) of residents who had heard about the airport, building to over two-thirds (71%) including other media sources.
- **Social contact** (45%) was the next most common type of channel, either through word of mouth (35%) or social media (22%).
- A **local channel** (including local MP, local council, community group or local event) as a group was nominated by one in four (26%), being most nominated in South West region (42%).

Key measures of community sentiment

Key measures of sentiment were ratings of favourability towards the airport and positive benefits outweighing any negative impact.¹

- In March-April 2019, over half of residents of Western Sydney expressed positive sentiment towards the airport on key measures of *favourability towards the airport* (64% agreeing they

¹ Rating scales were 0 to 10, with 0 being a lower sentiment (e.g., strongly disagree, not at all important, not at all concerned) and 10 being a higher sentiment (e.g., strongly agree, very important, very concerned). Ratings have generally been grouped in into three bands for reporting: 0-3 (a lower position, also described as 'disagree', 'not important', etc.), 4-6 (described as 'neutral') and 7-10 (a higher position also described as 'disagree', 'not important').

were in favour) and *positive benefits outweighing any negative impact* (60% agreeing); with less than one in ten (8%) holding a negative position on each.

- These results were close to those seen in May-June 2017 following announcement of the airport (67% and 60% respectively), and at least as high as previous survey in May-June 2018 (61% and 58% respectively).
- Favourability was marginally lowest in Inner West region (57%) compared with the other regions (62-66%) and Inner West was the only region where favourability was not higher than in December 2016 (58%).
- A further finding was that residents who were neutral on favourability reported being less knowledgeable about the airport than residents more negative or positive, indicating that increasing the level of awareness can lead to polarising of overall favour.

Overall concern

In March-April 2019, residents were more divided on concern that building the airport will have a *negative impact on Western Sydney* compared with the other key measures:

- around one-third disagreed (35%), being less concerned about a negative impact
- around one-quarter (26%) agree, being more concerned about a negative impact
- agreement about a negative impact had declined from May-June 2018 (35%), with the decline occurring in all four regions.

Importance of 24/7 operation

Residents rated the *importance of 24/7 operation* and gave reasons for their rating.

- over two-fifths (45%) agreed with the importance of 24/7 operation, recovering to results seen in May-June 2017 and September-October 2017 (45%-47%) and marginally above the relatively low results in the surveys conducted in 2018 (40%-42%).
- one-quarter (25%) of residents disagreed with the importance of 24/7 operation, and over one-quarter (29%) were neutral or unsure of its importance.
- agreement was broadly similar across the regions (40-46%).

Key themes for related to the position on importance, nominated unprompted, were:

- **positive themes** around the viability of the airport (27%); benefits (20%) including tourism and economic benefits to Sydney (10%) and benefits around ease and convenience to users (10%); and the general need for an airport (12%)
- **negative themes** around noise pollution (24%), other impacts on residents (16%) and lack of a need for an airport (17%).

While two-fifths (40%) of residents in March-April 2019 agreed that planning restrictions will lead to fewer residents being impacted by noise compared to the airport at Mascot, close to half (48%) were neutral or uncertain. Agreement was at a similar level in May-June 2018 (41%).

Perceptions of key projects and initiatives

A minority of residents were aware of the **Western Sydney City Deal** and of the **North South Rail Link**:

- overall, less than one in three (30%) of residents were aware of the **Western Sydney City Deal**, with one in five (20%) aware of at least a small amount; there were no significant differences between the regions
- recognition of specific Western Sydney City Deal elements was greatest for the **North South Rail Link** (30%)—or the Sydney Metro Greater West—while a smaller minority of residents were aware of the Western Sydney Aerotropolis (13%) and Western Parkland City Liveability Program (11%)
- awareness of the **North South Rail Link** differed between different aspects of the rail service:—being higher for the link being ready for the airport opening (25%) and the areas being linked (25%); and lower for the more administrative aspects—being funded by governments (15%) and undertaking of a business case (10%)
- awareness of aspects of the rail service was on average lower among Inner West region residents, particularly for the service being ready for the airport opening (18%) and the areas being linked (16%).

Perceived Barriers and Motivators

While the majority of residents in March-April 2019 continued to have a positive overall perception that benefits of the airport outweigh any negative impacts, and of benefits from the airport, there continued to be areas of concern to residents.

Concerns

Important areas of concern among Western Sydney residents continued to focus on traffic, noise and environmental impacts. Over half of residents surveyed in March-April 2019 expressed concern, similar to the earlier surveys, about:

- increase in traffic both during construction (54%) and once running (55%)
- noise late at night and early in the morning if the airport operates 24 hours a day (55%)
- general noise pollution once running (52%).

These levels of concern have remained similar through surveys since May-June 2017.

Benefits

Around two-thirds or more of residents in March-April 2019 viewed economic gains for Western Sydney, improved roads and public transport, and supporting the airport at Mascot as benefits of the airport. There were some increases in agreement compared with May-June 2018:

- **will bring jobs closer to the region** (77% vs. 72% in May-June 2018, with a +10% increase in South West region)
- will bring improved roads and public transport to the region (65% vs. 59% in May-June 2018)
- **is necessary to support Western Sydney's growing population and economy** (69%, vs. 62% in May-June 2018, with a +10% increase in South West region).

Ratings of benefits were found to be the more important driver of favourability towards the airport compared with ratings of concerns, when the different groups of ratings were analysed together.

Informing the community

Importance of being informed about progress:

The majority (54%) of Western Sydney residents in March-April 2019 continued to see it as important (rating 7-10) to be informed about progress of the airport. Importance of being informed:

- increased with age from around half (48%) of residents aged 18-34 years up to over three in five (63%) residents aged 55 years and over
- was less likely among residents in Inner West region (41% vs. 54-61% for the other regions) with residents of South West region having marginally greatest interest (61%).

Residents with higher ratings of importance were more likely to:

- report they knew more about the airport
- be in favour of the airport
- consider that the benefits would outweigh any negative impacts
- consider it important for the airport to operate 24/7.

When considering any positive rating of importance (6-10), the incidence increased to two-thirds (67%) of residents, again being lower in Inner West region (57%). The incidence was marginally highest in South West region (73%) and exceeded two in three in the other two regions.

Preferred channels

Among those residents expressing a positive rating of importance, the most preferred channel group for receiving information among those presented favoured mainstream news media, similar to the reported sources of information.

- Mainstream media (71% overall), including **news sources** in particular (66%), continued to be the most preferred type of communication channel grouping.
- A **local source** (55% overall) was the next most preferred channel grouping including local council, local MP, community groups or information stands (ranging over 25-30% nomination).
- A **social channel** (44%) or government/airport company website (40%) were in the next tier of nominated groupings.
- While there was a moderately strong interest for a dedicated **government website** (31%)—www.westernsydneyairport.gov.au—less than one in six (13%) residents reported having used a government or the existing company's website as a source of information.

1.5. Suggested Improvements

Area	Suggested Improvements
Awareness of Western Sydney International Airport and sources of information	<p>Utilise mainstream news sources as a proven successful source of information to resident, maintaining a program of opportunities for the media.</p> <p>The social media channel remains attractive for residents under the age of 55 and allows specific micro-targeting.</p>
Key measures of community sentiment	<ul style="list-style-type: none"> • <i>Favourability</i> <p>Key areas to communicate are benefits and improvement to the economy, jobs and infrastructure locally, as well as wider economic benefits in Sydney</p> <p>Specific channel selection and communication content should take into account audiences having lower sentiment: residents in South West region, female residents and those aged 18-34, with the last group potentially via social media micro-targeting.</p> <ul style="list-style-type: none"> • <i>24/7 operation</i> <p>Promote understanding of how noise issues are being managed, in particular the planning restrictions around the airport to limit who will be affected</p> <p>Inform about the rationale for 24/7 operation, including the economic benefits to the area and Sydney, and the general need to increase operational capacity to cope with future growth.</p>
Key Projects and Initiatives	<p>Communicate details of what is being implemented through the Western Sydney City Deal, including infrastructure, jobs, transport, other economic benefits, and social and liveability improvements.</p> <p>Promote the commitment to the North South Rail Link, how it will operate and that it will be operational when the airport opens, as a key improvement to the area.</p> <p>Facilitate effectiveness of communications by promoting relevant project elements as key developments occur.</p>

Area	Suggested Improvements
<p>Perceived Barriers and Motivators</p>	<p>Promote benefits from the airport development and transport links, focusing on economic benefits for the region, as a key driver of sentiment. As noted above, the approach should take into account audiences having lower sentiment: residents in South West region, female residents and those aged 18-34.</p> <p>Build on the promotion of economic benefits to help address concerns over potential disruptions during construction and after completion, including what steps are in place to manage the development.</p> <p>Provide detail around strategies used to address traffic and noise.</p>
<p>Informing the community: preferred channels</p>	<p>Utilise and improve on mainstream news sources, as the most successful channel for reaching residents, providing positive and engaging news stories via community engagement activities through to local media.</p> <p>Promote the websites through search engine marketing (SEM) or through social channels using content marketing.</p> <p>Supplementary channels, including newsletters and information stands will provide additional exposure for residents demanding greater levels of information.</p>

2. Background and Objectives

2.1. Study Context

The Australian Government announced in April 2014 that an airport for Western Sydney would be built in Badgerys Creek. An environmental assessment was conducted in 2015 and 2016, with the Western Sydney Airport Environmental Impact Statement (EIS) finalised in 2016 and Western Sydney Airport Plan determined in December 2016.

In the 2017-18 Federal Budget, the Australian Government announced it would invest up to \$5.3 billion in equity to deliver the airport through a government-owned company. Western Sydney Airport (WSA) was established in August 2017 as the government-owned company to build and operate Western Sydney International (Nancy-Bird Walton) Airport.

Established in 2017, the Forum on Western Sydney Airport (FOWSA) was created to connect the community, the Government and WSA during the planning and development of the Western Sydney International Airport.

The Western Sydney City Deal (the City Deal) was signed in March 2018 by the Australian and NSW governments and the eight City Deal councils. One key feature of the City Deal is the Australian and NSW governments committing to deliver the first stage of the North South Rail Link – a metro-style service from St Marys to the Western Sydney Aerotropolis via the airport – now known as Sydney Metro Greater West.

Construction started on the airport in September 2018.

Ensuring the community is kept informed throughout the development and construction of the airport is essential to the Western Sydney International Airport's longer-term success. To attain this level of success, an informed strategic communications plan is critical.

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 airport. The quantitative research aims to provide the WSU with an understanding of community attitudes within the broader Western Sydney area.

Key research objectives for the surveys were to:

- Understand current awareness levels and sources of information about the airport.
- Identify the levels of awareness, attitudes and perceptions of Western Sydney residents around elements of the airport Project, transport connections, Western Sydney Aerotropolis and the Western Sydney City Deal, and changes in these measures over time.
- Identify perceived barriers and motivators towards a positive sentiment.
- Identify preferred (unpaid) channels for communication.

This document provides the research findings and recommendations for the quantitative phase in this evaluative research program. A new benchmark for the quantitative research was conducted in March-April 2019.

3. Research Method

3.1. Research Design

The method for the current series of surveys, starting in March-April 2019, is based on two previous series of tracking surveys: the first series of five surveys was conducted between November 2014 and December 2016; the second series of four surveys was conducted between May-June 2018.

With the progress in the development of the airport since the December 2016 wave, including the announcement of the Australian Government's commitment to deliver and invest in the airport, changes were made in the second series of 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.

Further changes were made to the questionnaire for this third series of surveys to address recent developments in projects and initiatives associated with the airport

The March-April 2019 survey was the benchmark for the third series. This wave had a sample target of 1000, and a final sample of 1008. 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 continues to be residents living within Western Sydney area. The target audience was divided into four regions based on Local Government Areas (LGAs). Each LGA was in turn defined by postcode, based on the LGA accounting for the greatest share of population in the postcode. Inner West region was included for tracking awareness and sentiment as the operation of a second international airport in Sydney can provide future benefits to that area by easing capacity constraints at Sydney (Kingsford Smith) Airport at Mascot.

Table 1: Western Sydney Regions and Local Government Areas for the March-April 2019 wave

Region	Local Government Area
South West	Camden
	Campbelltown
	Liverpool
	Wollondilly
Inner West	Inner West
	Burwood
	Canada Bay
	Strathfield
North West	The Hills
	Blacktown
	Blue Mountains
	Hawkesbury
	Penrith
West Central	Cumberland
	Canterbury Bankstown
	Fairfield
	Parramatta

Population statistics from the Australian Bureau of Statistics, based on the 2016 census, take into account mergers and re-defining of boundaries for several LGAs that took place in 2016. The

assignment of LGAs to regions is shown in Table 1. The regions are the same as those used in the second survey series, continuing the following changes from the first survey series:

- Marrickville was included in Inner West region, as it formed part of the new Inner West Council
- Canterbury was included in West Central region, as formed part of the new Canterbury-Bankstown council.

3.3. Sampling and Weighting

Quotas for the March-April 2019 survey were set by age, gender and region. A sample size target of 1,000 was set for the survey, above the standard 600 to be used for the subsequent tracking surveys, as the survey served as a benchmark for new questions to cover recent developments. The sampling was set overall to targets of 300 in each of the two regions with larger population (North West and West Central) and 200 in each of the two smaller regions (South West and Inner West). 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.²

The survey is of a sample of residents in Western Sydney. As it is a sample of the population, a survey result is an *estimate* of the population result, with a degree of uncertainty. This degree of uncertainty is referred to as a *margin of error*. The margin of error is typically represented through a 95% confidence interval. This means that the *true population result* will fall into the confidence intervals of 95% of random survey samples of the same size. Examples of confidence intervals based on total survey size are:³

- for a survey sample of 1,000, and a survey result of 50%, the 95% confidence interval is $\pm 3.1\%$
- for 600, $\pm 4.0\%$
- for 500, $\pm 4.5\%$
- for 300, $\pm 4.5\%$
- for 200, $\pm 6.9\%$.

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 airport project and areas of communication. The questionnaire covered:

- awareness and understanding of the airport development
- sources of information and awareness
- attitudes and opinions of the airport development
- awareness of projects and initiatives
- attitudes towards surrounding infrastructure development

² It should be noted that in telephone and online surveys, respondents from culturally and linguistically diverse communities tend to be younger than other respondents, and differences in survey results associated with these residents have been assessed further by taking age into account in the statistical analysis.

³ 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.

- information seeking behaviour and preferred channels for communication
- demographics.

3.5. Results and Comparisons

3.5.1. Presentation of survey waves

- In most charts and tables, results for March-April 2019 are presented as the main results: e.g., Figure 2 for detailed results on a scale questions, Table 6 by demographics, and Figure 6 for a series of statements.
- Some key measures are shown for both the two earlier survey series and the current series: e.g., Table 5.
- Comparisons for demographic groups by survey wave are shown with the second series (2017-2018), and the December 2016 wave where relevant: e.g., Figure 5.
- Where a series of statements is measured, comparisons with waves in the second series (2017-2018) are also included where relevant as columns of results: e.g., Figure 6.
- Comparisons with the previous wave in May-June 2018 have also been made for each region on relevant sets of statements: e.g., Table 11.

Table 2: Presentation of survey waves

Series	Waves	Comparisons
First (2014-2016)	November 2014	Tracking of several key metrics
	June 2015	
	December 2015	
	April 2016	
	August 2016	
	December 2016	Tracking of several key metrics with later surveys, including by demographics
Second (2017-2018)	May-June 2017	Tracking of all questions that have continued into March-April 2019
	September-October 2017	
	February-March 2018	
	May-June 2018	
Third (2019)	March-April 2019	New benchmark: comparison by demographics; tracking with previous waves on key metrics; and comparison with May-June 2018 for each region on select measures

3.5.2. Tests of statistical significance

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

- **higher result** and **lower result**.

The tests assess differences between waves and between demographic sub-groups for each result in a particular data set.

In a number of cases where there are three or more sub-groups, only one result might be highlighted (e.g., in Table 6, 18-34 years age group highlighted as highlighted as **higher** for '4-6 Neutral'). This situation would generally mean that the results for the other sub-groups *as a pool*, but *not individually*, would be statistically significant in the opposing direction (in this case, **lower**).

3.5.3. 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 March-April 2019 in Table 5. The four results add to 101% rather than 100% due to rounding.

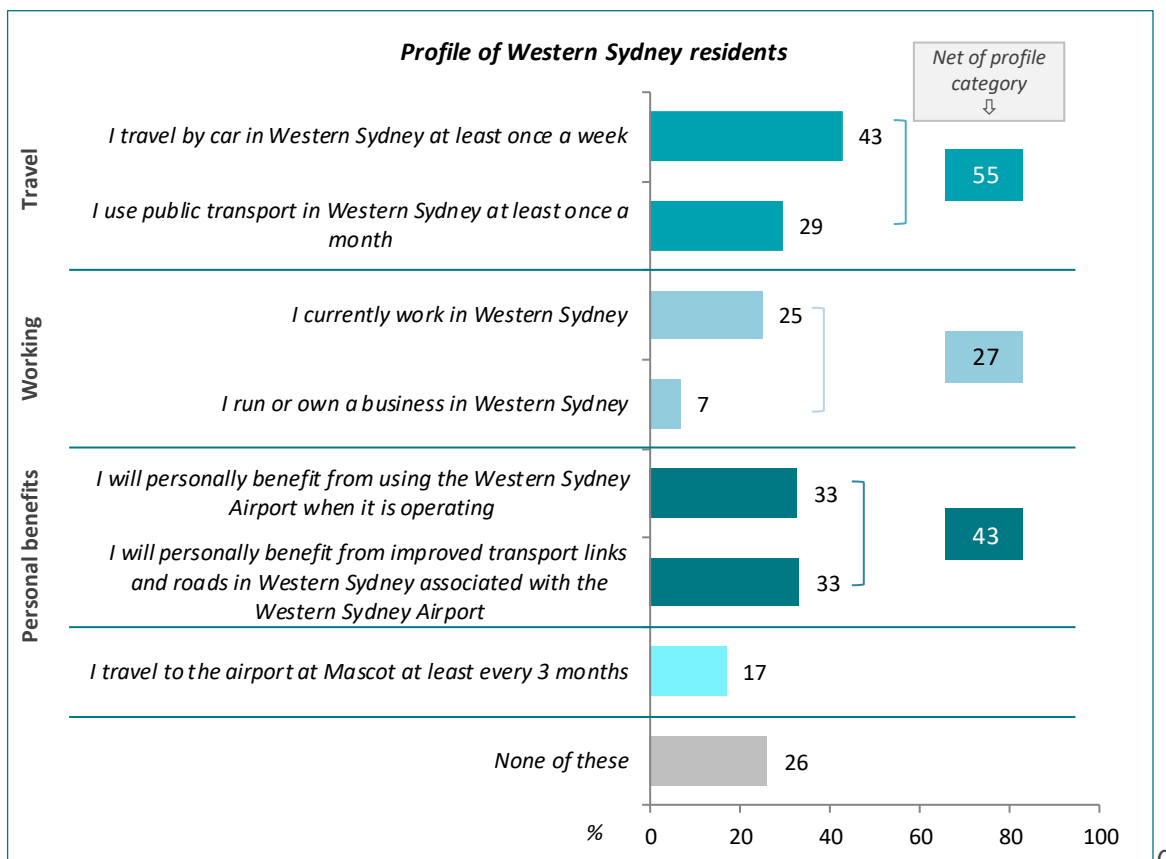
3.6. Sample Profile

Table 3: Sample profile, unweighted (Mar-Apr 2019)

Variable	Profile	Total	
		%	<i>n</i>
Total	All	100	1,008
Gender	Male	49	487
	Female	51	520
	Other	<1	1
Age	18-34	34	358
	35-54	36	347
	55+	30	302
Region	South West	20	200
	Inner West	20	201
	North West	30	305
	West Central	30	302
Culturally and Linguistically Diverse Background	Yes	29	293
	No	70	703
	<i>Prefer not to say/Unsure</i>	1	12
Aboriginal and/or Torres Strait Islander	Yes	1	15
	No	91	922
	<i>Prefer not to say/Unsure</i>	7	71
Education	Completed some high school	8	83
	High school graduate	16	159
	Technical college / TAFE	27	271
	Undergraduate degree	28	277
	Postgraduate degree	21	208
	<i>Prefer not to say</i>	1	9
Employment	Work full-time (≥ 35 hours per week)	42	373
	Work part-time (<35 hours per week)	17	137
	Self-employed	6	56
	Retired	16	163
	In full time education	3	35
	Full time home / house duties	7	71
	Receiving government allowance	<1	1
	Not currently employed	6	59
	<i>Prefer not to say</i>	1	7
Household Income	<\$40,000	17	170
	\$40,000 - \$64,999	17	168
	\$65,000 - \$79,999	10	100
	\$80,000 - \$99,999	12	116
	\$100,000 - \$149,999	19	188
	\$150,000+	11	107
	<i>Prefer not to say/Unsure</i>	16	159
Marital Status	Registered married	52	522
	De facto/cohabiting relationship	12	122
	Not married	34	343
	<i>Prefer not to say</i>	2	21
Parental Status	Children	33	329
	No Children	66	668
	<i>Prefer not to say</i>	1	11

Residents were asked a series of questions about working and travelling in Western Sydney, as well as the airport at Mascot and perception of some personal benefits associated with the new airport (Figure 1, Table 4).

Figure 1: Profile of Western Sydney residents and Sydney Airport usage (Mar-Apr 2019)



Q17. Which of the following applies to you? Please select all that apply.
Base: All (n=1,008)

Table 4: Profile of Western Sydney residents by region (Mar-Apr 2019)

Profile	TOTAL	Region			
		South West	Inner West	North West	West Central
	%	%	%	%	%
Travel in Western Sydney	55	55	32	68	52
I travel by car in Western Sydney at least once a week	43	49	17	56	38
I use public transport in Western Sydney at least once a month	30	25	24	36	29
Work in Western Sydney	27	29	12	33	26
I currently work in Western Sydney	25	27	10	33	24
I run or own a business in Western Sydney	7	9	5	9	5
Benefits from airport	43	50	27	49	40
I will personally benefit from using the Western Sydney Airport when it is operating	33	41	18	39	30
I will personally benefit from improved transport links and roads in Western Sydney associated with Western Sydney Airport	33	38	21	37	32
Use of airport at Mascot					
I travel to the airport at Mascot at least every 3 months	17	17	24	18	13
None of these/Not stated	26	26	44	16	28
Sample size	1008	200	201	305	302

Q17. Which of the following applies to you? Please select all that apply.
Base: All (n=1,008)

4. Key Measures

4.1. Definition of Metrics

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

- questions on favourability and benefits, 0=strongly disagree, 10=strongly agree
- questions on concerns, 0=not at all concerned, 10= extremely concerned
- A question about being informed of progress, 0=not at all important, 10=very important.

Ratings have generally been grouped into three bands for reporting: 0-3 (a negative position, also described as 'disagree', 'not important', etc.), 4-6 (described as 'neutral') and 7-10 (a positive position also described as 'disagree', 'not important').

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

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

These descriptors were developed during the questionnaire development phase to differentiate levels of knowledge about the airport, to enable benchmarking and tracking of changes. Another key metric was on sources of information about the airport, involving selection from a list of items, with multiple selections allowed. This format was also used in other questions including preferred sources of communication, and awareness of initiatives and communications.

4.2. Sentiment

4.2.1. Measures of sentiment

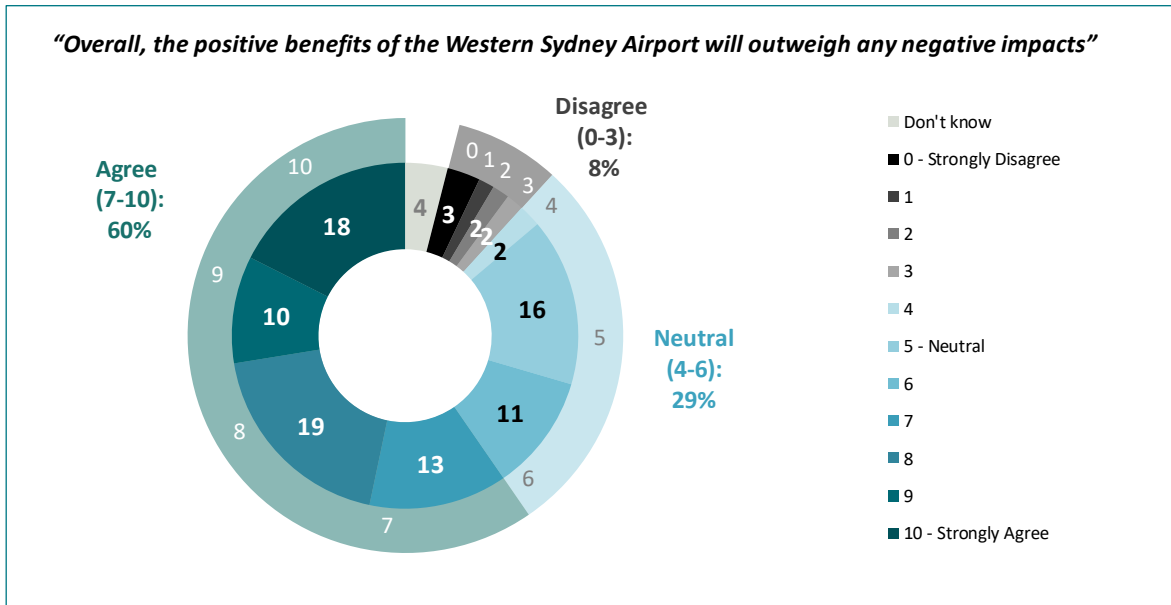
Sentiment towards the new airport development at Badgerys Creek was measured through two key questions: perception that the overall benefits outweigh any negative impacts; and favourability of the development.

4.2.2. Perception that the overall benefits outweigh any negative impacts

In March-April 2019, the majority (60%) of Western Sydney residents agreed (rating 7-10) that overall benefits of the new airport development outweigh any negative impact (Figure 2).

The result in the current survey maintained the higher level of sentiment seen since May-June 2017 (56-63% agreeing) compared with results during 2016 (48-49% agreeing) (Table 5). Disagreement in March-April 2019 was at a relatively low level (8%). The increase in agreement starting in the May-June 2017 survey followed the announcement in the May 2017 Federal Budget that the Australian Government would deliver the airport.

Figure 2: Perception of overall benefits of Western Sydney Airport vs. negative impacts (Mar-Apr 2019)



Q7. Using a scale of 0 to 10, where 0 means strongly disagree and 10 means strongly agree, to what extent do you agree or disagree with the following statement? “Overall, the positive benefits of Western Sydney Airport at Badgerys Creek would outweigh any negative impacts.” Base: All (n=1,008)

Compared with 2016, this overall increase had been accompanied by decreases in both average disagreement (rating 0-3) and a neutral/unsure position (Table 5).

Table 5: Perception of overall benefits of Western Sydney Airport vs. negative impacts (Nov 2014 to Feb-Mar 2019)

Overall, positive benefits of the Western Sydney Airport will outweigh any negative impacts											NEW BENCHMARK Mar-Apr 2019
Agreement	Nov 2014	Jun 2015	Dec 2015	Apr 2016	Aug 2016	Dec 2016	May-Jun 2017	Sep-Oct 2017	Feb-Mar 2018	May-Jun 2018	%
Rated 0-10	%	%	%	%	%	%	%	%	%	%	%
0-3 Disagree	11	14	11	11	12	12	8	8	11	7	8
4-6 Neutral	30	30	30	32	32	31	29	25	30	30	29
7-10 Agree	49	49	52	49	48	49	60	63	56	58	60
Don't know	10	7	7	8	8	8	2	4	3	5	4
Sample size	501	513	502	499	505	503	1244	615	613	903	1008

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 between waves There can be a rounding ‘error’ of ±1% when adding two or more percentage results

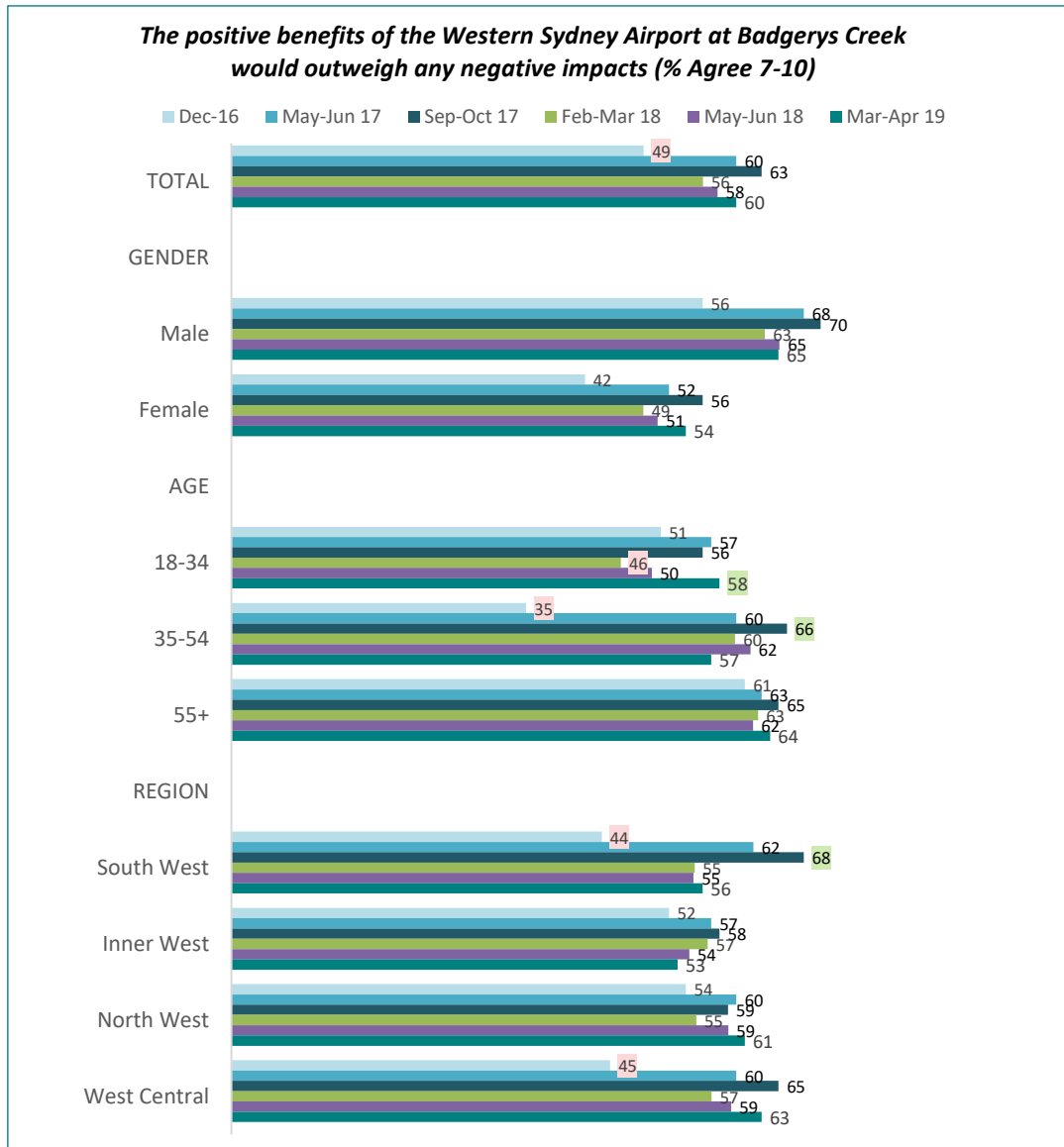
Table 6: Perception of overall benefits of Western Sydney Airport vs. negative impacts, by demographics (Mar-Apr 2019)

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	6	9	4	10	10	12	8	8	5	7	8
4-6 Neutral	29	26	31	35	27	23	30	32	28	27	29	28
7-10 Agree	60	65	54	58	57	64	56	53	61	63	60	60
Don't know	4	3	5	3	6	3	2	7	3	5	4	4
Sample size	1008	487	520	358	347	302	200	201	304	302	293	702

Q7. Agreement: “Overall, the positive benefits of the Western Sydney Airport at Badgerys Creek would outweigh any negative impacts” Base: All (n=1,008) Shading highlights statistically significantly higher and lower results between groups There can be a rounding ‘error’ of ±1% when adding two or more percentage results

Across the demographic groups, agreement with the proposition in March-April 2019 continued to be stronger among males (65% agreeing) than females (54%), with a corresponding difference on the neutral position (26% vs. 31% respectively), and to a smaller extent disagreement (6% vs. 9%) (Table 6). There were no confirmed differences on agreement among the age groups. The younger 18-34 years group, however, had shown some increase since having relatively low agreement in early February-March 2018, and was now more likely to be neutral than the other age groups (35% vs 23-27% for the older two groups) and less likely to disagree (4% vs. 10%). Agreement was also similar across the regions (ranging from 56% to 63%).

Figure 3: Perception of overall benefits of Western Sydney Airport vs. negative impacts, by demographics (Dec 2016 to Mar-Apr 2019)



Q7. Agreement: "Overall, the positive benefits of the Western Sydney Airport at Badgerys Creek would outweigh any negative impacts"
Base: All (n=1,008)

Shading highlights statistically significantly higher and lower results between waves

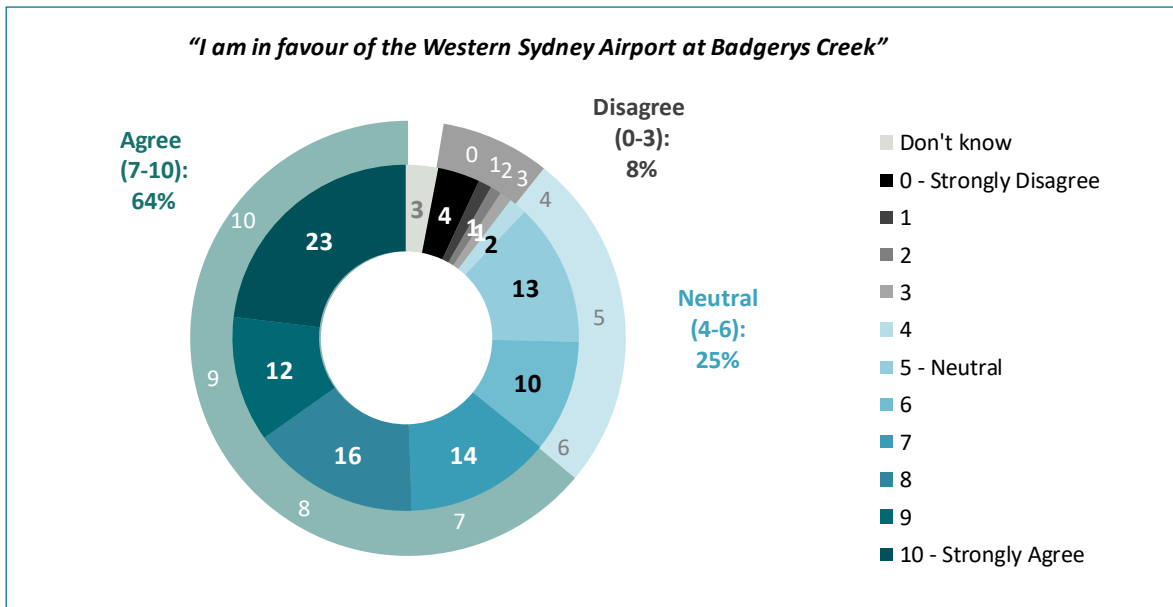
Comparing the surveys by demographics shows the increase in agreement from December 2016 occurred mainly in South West region (where the development site is located) and West Central region, which were at lower levels in December 2016 (44% and 45% respectively) compared with the other two regions (Inner West – 52%, North West – 54%) (Figure 3). Agreement had peaked in September-October 2017 in both South West region (68%) and West Central region (65%). Agreement in these regions in March-April 2019 has been maintained at a higher level than in 2016 (56% and 63% respectively). However, sentiment in South West Region is below the earlier peak.

The overall increase in agreement from December 2016 had occurred mainly among residents aged 35-54 years, and among both male and female residents.

4.2.3. Favourability of the Western Sydney Airport at Badgerys Creek

The second key measure of sentiment was about whether residents were in favour of the new airport. In March-April 2019, almost two-thirds (64%) of residents were in favour (rating 7-10) (Figure 4). This level of favourability was similar to the peak seen in the May-June 2017 survey (67%) following confirmation that the airport was going to be built. Agreement averaged below three in five (57%) during the 2014-2016 period and averaged above that level (63%) from 2017 to the March-April 2019 survey (Table 7).

Figure 4: Favourability of the Western Sydney Airport at Badgerys Creek (Mar-Apr 2019)



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"

There can be a rounding 'error' of ±1% when adding two or more percentage results

Base: All (n=1,008) There can be a rounding 'error' of ±1% when adding two or more percentage results

The incidence of those unsure remained very low in March-April 2019 (3%), and it is this position that had declined most from the pre-2017 period (reducing by an average of 4 percentage points), accompanying the increase in agreement. Some of the increase in favourability from 2017 onwards is likely therefore to have come from reaching a group that was previously less aware.

Table 7: Favourability of the Western Sydney Airport at Badgerys Creek by waves (Nov 2014 to Mar-Apr 2019)

Agreement	Sentiment towards the airport										NEW BENCHMARK Mar-Apr 2019
	Nov 2014	Jun 2015	Dec 2015	Apr 2016	Aug 2016	Dec 2016	May-Jun 2017	Sep-Oct 2017	Feb-Mar 2018	May-Jun 2018	
Rated 0-10	%	%	%	%	%	%	%	%	%	%	%
0-3 Disagree	12	12	8	12	12	11	10	9	12	9	8
4-6 Neutral	28	25	25	25	26	25	22	24	27	28	25
7-10 Agree	54	56	61	57	56	56	67	64	60	61	64
Don't know	6	7	6	6	6	8	1	3	2	3	3
Sample size	501	513	502	499	505	503	1244	615	613	903	1008

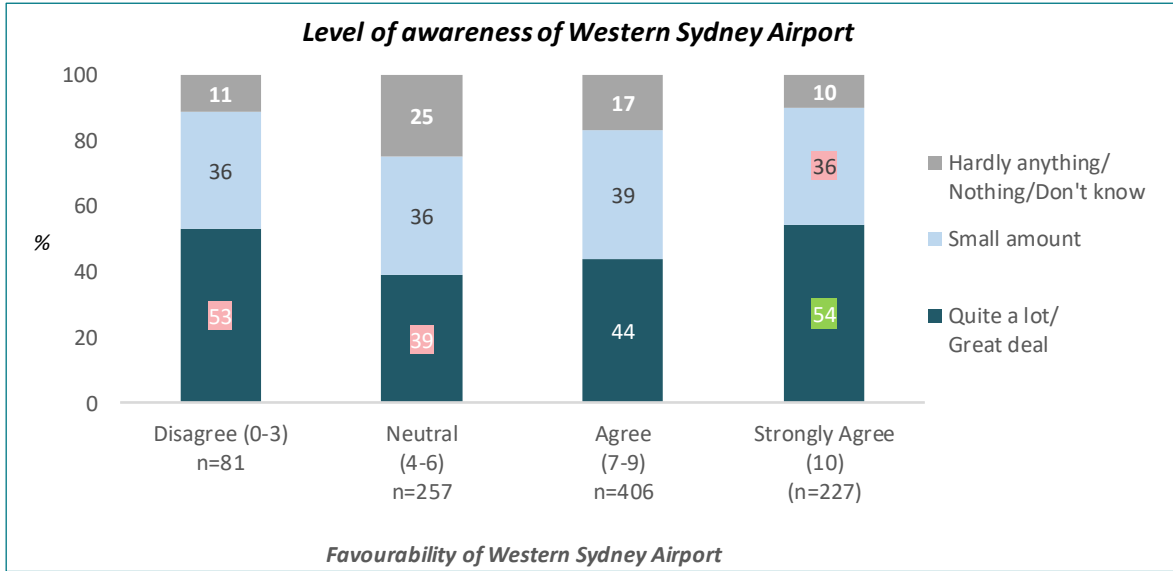
Q13. Using a scale of 0 to 10, where 0 means strongly disagree and 10 means strongly agree, to what extent do you agree or disagree with the following statement? "I am in favour of the Western Sydney Airport at Badgerys Creek"

Base: All (n=501-1244) There can be a rounding 'error' of ±1% when adding two or more percentage results

Shading highlights statistically significantly higher and lower results between waves

There had been a pattern in previous waves for knowledge of the airport to be lower among residents who were more *neutral* about favourability, compared with residents expressing *lower* or *higher* favourability. This pattern was again evident in March-April 2019 and is illustrated in Figure 5: *neutral* (rating 4-6)– 39% knowing ‘quite a lot/great deal’ vs. *disagree* (0-3) – 53%, *agree* (7-9) – 44%, and *strongly agree* (10) – 54%). This pattern suggests that increasing knowledge of the airport particularly among neutral residents can lead to polarising of perceptions.

Figure 5: Level of awareness of the Western Sydney Airport at Badgerys Creek by favourability (Mar-Apr 2019)



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

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

Base: All (n=1,008) There can be a rounding ‘error’ of ±1% when adding two or more percentage results

Shading highlights statistically significantly higher and lower results between waves

There were some significant differences measured between the demographic groups on favourability of the airport in March-April 2019 (Table 8). The main differences were for:

- residents aged 55 years and older were the most favourable (70% agreeing vs. 59-63% for the other age groups) and least likely to hold a neutral position
- male residents (69%) were more likely than female residents (58%) to be in favour
- residents in South West region were the most negative (13% vs. 6-9% in the other regions), although positive sentiment was relatively similar.

Table 8: Favourability of the Western Sydney Airport at Badgerys Creek, by demographics (Mar-Apr 2019)

Agreement	TOTAL	Gender		Age			Location				Culturally and Linguistically Diverse	
		Male	Female	18-34	35-54	55+	South West	Inner West	North West	West Central	Yes	No
Rated 0-10	%	%	%	%	%	%	%	%	%	%	%	%
0-3 Disagree	8	6	10	5	8	11	13	6	9	6	5	9
4-6 Neutral	25	23	27	31	26	18	23	31	23	26	25	25
7-10 Agree	64	69	58	59	63	70	62	57	66	65	67	63
Don't know	3	2	5	6	3	1	2	6	2	3	3	3
Sample size	1008	487	520	358	347	302	200	201	304	302	293	702

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

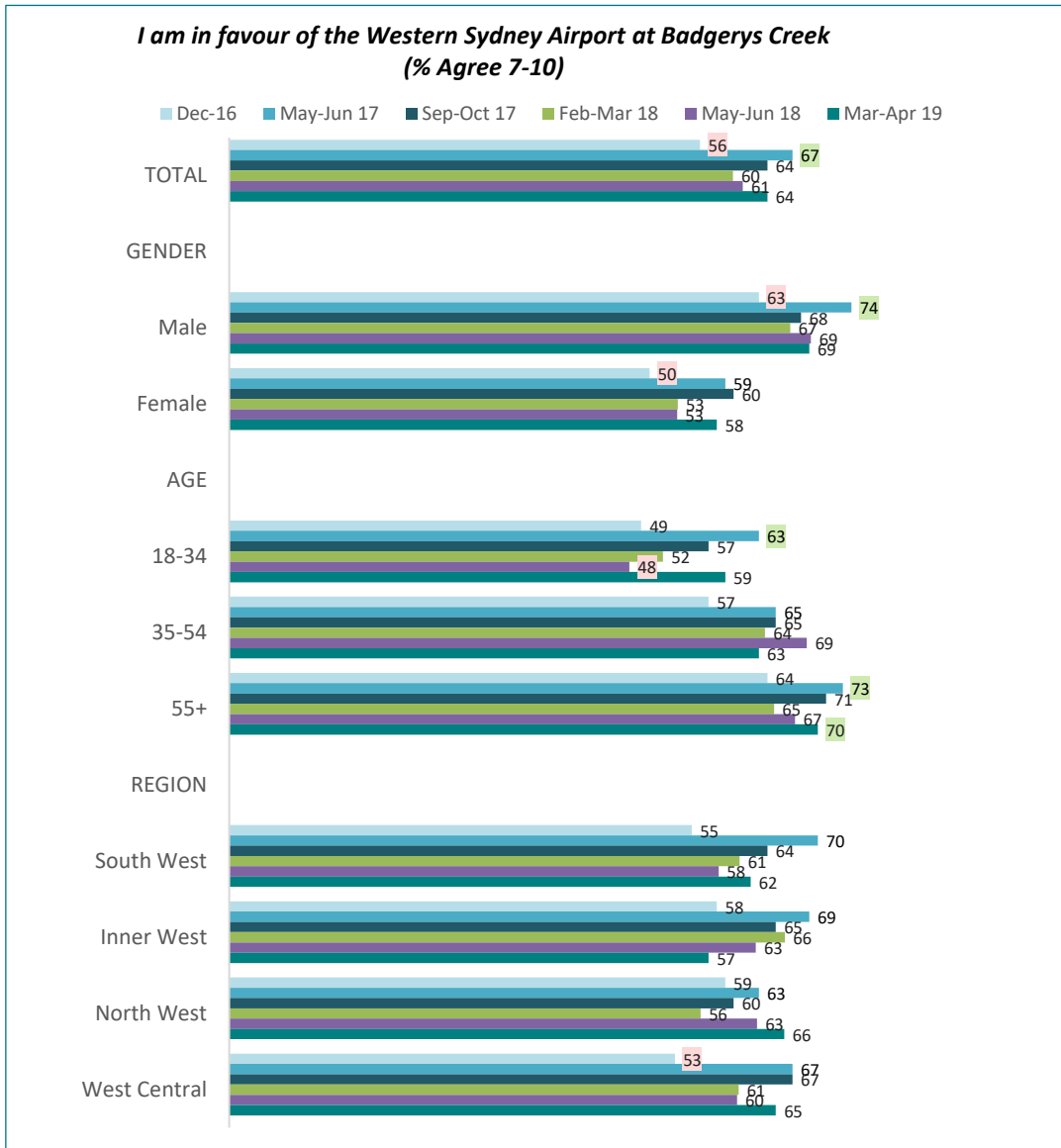
Base: All (n=1,008) There can be a rounding ‘error’ of ±1% when adding two or more percentage results

Shading highlights statistically significantly higher and lower results

Comparing the surveys from December 2016 onwards shows substantial increase in favourability in May-June 2017 (from 56% up to 67% overall) followed by some decline into 2018 (Figure 6). The result in March-April 2019 indicated some recovery and maintained an increase over 2016.

This overall pattern of increase and decline was similar in South West, Inner West and West Central regions, similar among both male and female residents, and stronger among residents aged 18-24 years and 55 years and over. By March-April 2019, all of the demographic groups other than Inner West region were maintained above the December 2016 level.

Figure 6: Favourability of the Western Sydney Airport at Badgerys Creek, by demographics (Dec 2016 to Mar-Apr 2019)



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

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

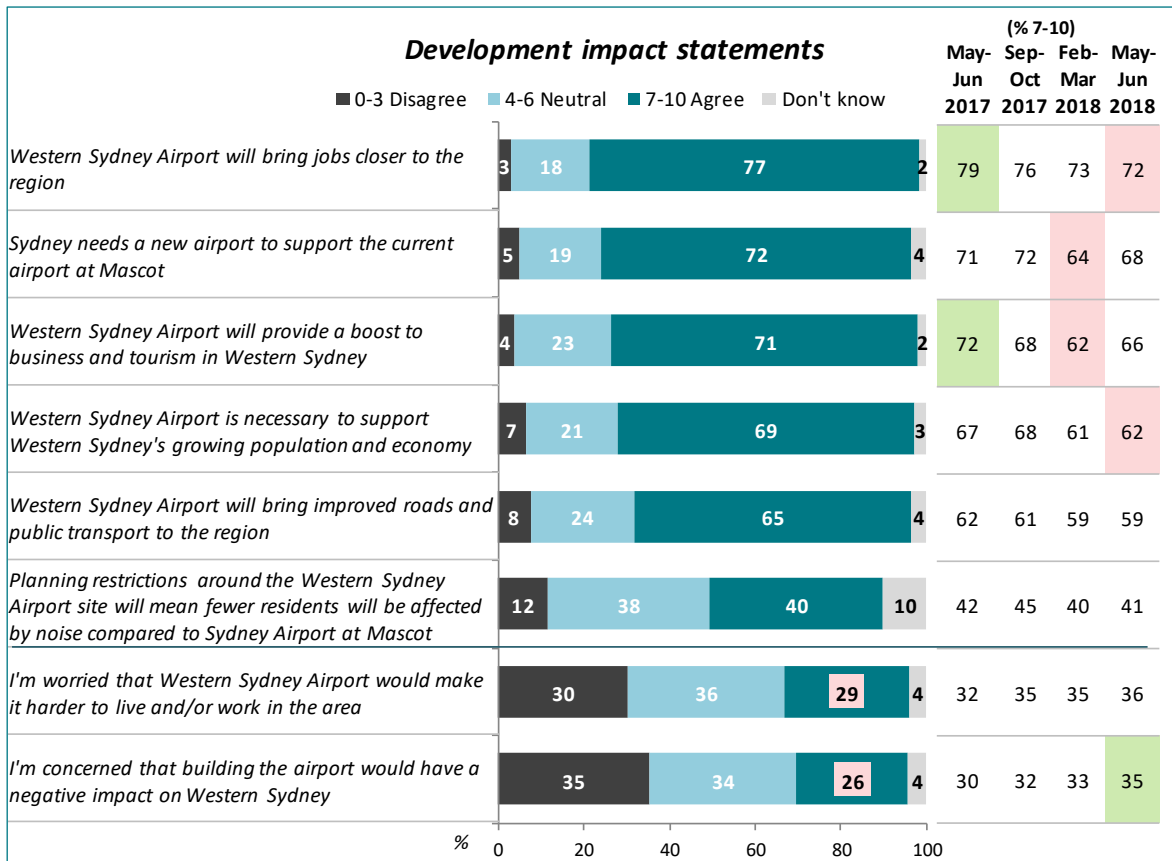
Shading highlights statistically significantly higher and lower results between waves

4.3. Perceived Benefits and Concerns

4.3.1. Perceptions of needs, benefits and impacts

Perceptions were measured on a range of needs, benefits and concerns around the development of the new airport. There had been a pattern for several benefits to have lower average agreement in 2018 compared with the May-June 2017 benchmark, although the differences were not large (Figure 7). Perceptions of the *benefits* in March-April 2019 were at least close to the levels seen in May-June 2017. In addition, agreement with the two areas of *concern*—harder to live or work in the area, and an overall negative impact on the area—were lower.

Figure 7: Perception of impacts of Western Sydney Airport development (Mar-Apr 2019, and comparison with May-Jun 2017, Sep-Oct 2017, Feb-Mar 2018 and May-Jun 2018 on 'agreement')



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

Base: All (Mar-Apr 2019, n=1,008; n=613, Sep-Oct 17, n=615; May-Jun 17, n=1,244; Feb-Mar 18, May-Jun 2018, n=903)

There can be a rounding 'error' of ±1% when adding two or more percentage results

Shading highlights statistically significantly higher and lower results between waves

4.3.2. Benefits

In March-April 2019, around three-quarters (77%) of residents continued to agree (rating 7-10) that the airport will 'bring jobs to the region' (Figure 7). Other benefits specifically to Western Sydney with over half agreeing included 'boost to business and tourism' (71%), 'necessary to support growing population and economy' (69%) and 'bring improved roads and public transport to the region' (65%). A similar level of support was evident for the broader benefit to Sydney to 'support the current airport at Mascot' (72%).

There continued in March-April 2019 to be much less acceptance that planning restrictions will lead to fewer residents being impacted by noise compared to the airport at Mascot (40% agreeing), with close to half (50%) neutral or uncertain.

4.3.3. Concerns

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

- making it ‘**harder to live and/or work** in the area’ (29% agree, 30% disagree)
- having ‘**a negative impact on Western Sydney**’ (26% agree, 35% disagree).

However, agreement had declined compared with May-June 2018 (Figure 7), along with an increase in disagreement (+6 and +7 percentage points respectively; Table 9). Overall, the relatively low levels of agreement in March-April 2019 were at least as good as the results in May-June 2017 following the announcement of the airport going ahead.

Table 9: Concern that building the airport would have a negative impact on Western Sydney, by waves (Nov 2014 to Mar-Apr 2019)

Concern about the negative impact building an airport would have on Western Sydney											
Agreement	Nov 2014	Jun 2015	Dec 2015	April 2016	Aug 2016	Dec 2016	May-Jun 2017	Sep-Oct 2017	Feb-Mar 2018	May-Jun 2018	NEW BENCHMARK Mar-Apr 2019
Rated 0-10	%	%	%	%	%	%	%	%	%	%	%
0-3 Disagree	25	22	21	24	23	25	34	33	32	28	35
4-6 Neutral	37	38	41	35	38	32	34	33	32	33	34
7-10 Agree	33	36	34	37	35	36	30	32	33	35	26
Don't know	5	4	4	4	4	6	2	2	3	4	4
Sample size	501	513	502	499	505	503	1244	615	613	903	1008

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)

There can be a rounding ‘error’ of $\pm 1\%$ when adding two or more percentage results

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

Looking at the demographic breakdown in March-April 2019, lower disagreement was among residents aged 18-34 years (27% vs. 38-41% for the older groups) with a commensurate higher neutral position (Table 10). Disagreement was also lower among female residents (30% vs. 40% for male residents). There were no substantial differences between the regions.

Table 10: Concern that building the airport would have a negative impact on Western Sydney, by demographics (Mar-Apr 2019)

Agreement	TOTAL	Gender		Age			Location				Culturally and Linguistically Diverse	
		Male	Female	18-34	35-54	55+	South West	Inner West	North West	West Central	Yes	No
Rated 0-10	%	%	%	%	%	%	%	%	%	%	%	%
0-3 Disagree	35	40	30	27	38	41	32	31	39	36	34	36
4-6 Neutral	34	33	36	42	32	28	34	40	34	33	36	34
7-10 Agree	26	24	28	28	25	25	33	22	25	25	25	27
Don't know	4	3	6	3	4	6	2	7	2	6	5	4
Sample size	1008	487	520	358	347	302	200	201	304	302	293	702

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

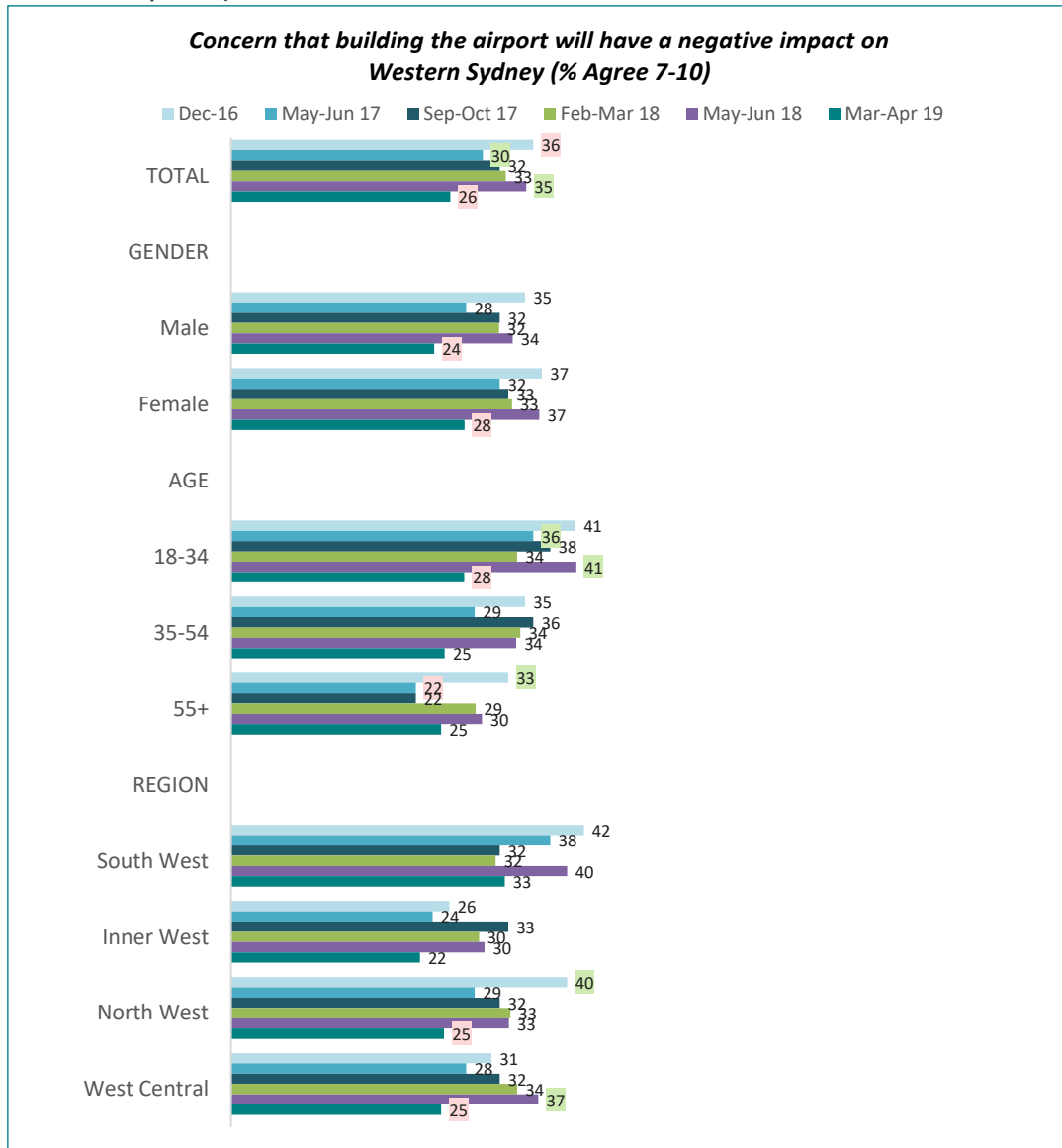
Base: All (n=1,008)

There can be a rounding ‘error’ of $\pm 1\%$ when adding two or more percentage results

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

Comparing results over time, some decline in concern in March-April 2019 compared with May-June 2018 was evident among both male and female residents, all age groups and all four regions (Figure 8). For all groups there was an overall increase compared with December 2016.

Figure 8: Concern that building the airport would have a negative impact on Western Sydney, by demographics (Dec 2016 to Mar-Apr 2019)



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 (Mar-Apr 2019, n=1,008; May-June 2018, n=903; Feb-Mar 18, n=613; Sep-Oct 17, n=615; May-Jun 17, n=1,244; Dec 16, n=503) Shading highlights statistically significantly higher and lower results between waves

Key differences between the regions in March-April 2019 were focused on Inner West region (Table 11), with:

- lower concern that the airport would ‘make it harder to live and/or work in the area’ (19% vs 29-35% for the other regions), which had decreased from the result in May-June 2018 (32%)
- lower agreement that ‘Sydney needs a new airport to support the current one at Mascot’ (62% vs. 71-77% in the other regions).

There were some indications of increases in agreement with benefits in South West region and West Central region (shifts of 10+ percentage points), although these were not confirmed as statistically significant).

Key Measures

Table 11: Agreement (rating 7-10) with needs, benefits and impacts, by region (Mar-Apr 2019, and comparison with May-Jun 2018)

Agreement	REGION							
	Mar-Apr 2019				Changes of 10+% from May-Jun 18			
	South West	Inner West	North West	West Central	South West	Inner West	North West	West Central
<i>Rating 7-10</i>	%	%	%	%	%	%	%	%
<i>Western Sydney Airport will bring jobs closer to the region</i>	79	75	75	77	+11	-	-	-
<i>Western Sydney Airport will bring improved roads and transport to the region</i>	62	55	63	71	-	-	-	+15
<i>Sydney needs a new airport to support the current one at Mascot</i>	71	62	77	73	-	-	-	-
<i>Western Sydney Airport will provide a boost to business and tourism in Western Sydney</i>	73	64	73	72	+11	-	-	-
<i>Western Sydney Airport is necessary to support Western Sydney's growing population and economy</i>	68	64	70	71	+10	-	-	+10
<i>Planning restrictions around Western Sydney Airport site will mean fewer residents will be affected by noise compared to Sydney Airport</i>	37	39	41	42	-	-	-	-
<i>I'm worried that Western Sydney Airport would make it harder to live and/or work in the area</i>	35	19	31	29	-	-13	-	-
<i>I'm concerned that building the airport would have a negative impact on Western Sydney</i>	33	22	25	25	-	-	-	-12
<i>Sample size</i>	200	201	305	302				
<i>Highlighting statistically significantly higher and lower results:</i>	<i>between regions in Mar-Apr 2019</i>				<i>comparing each region with May-Jun 2018</i>			

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?

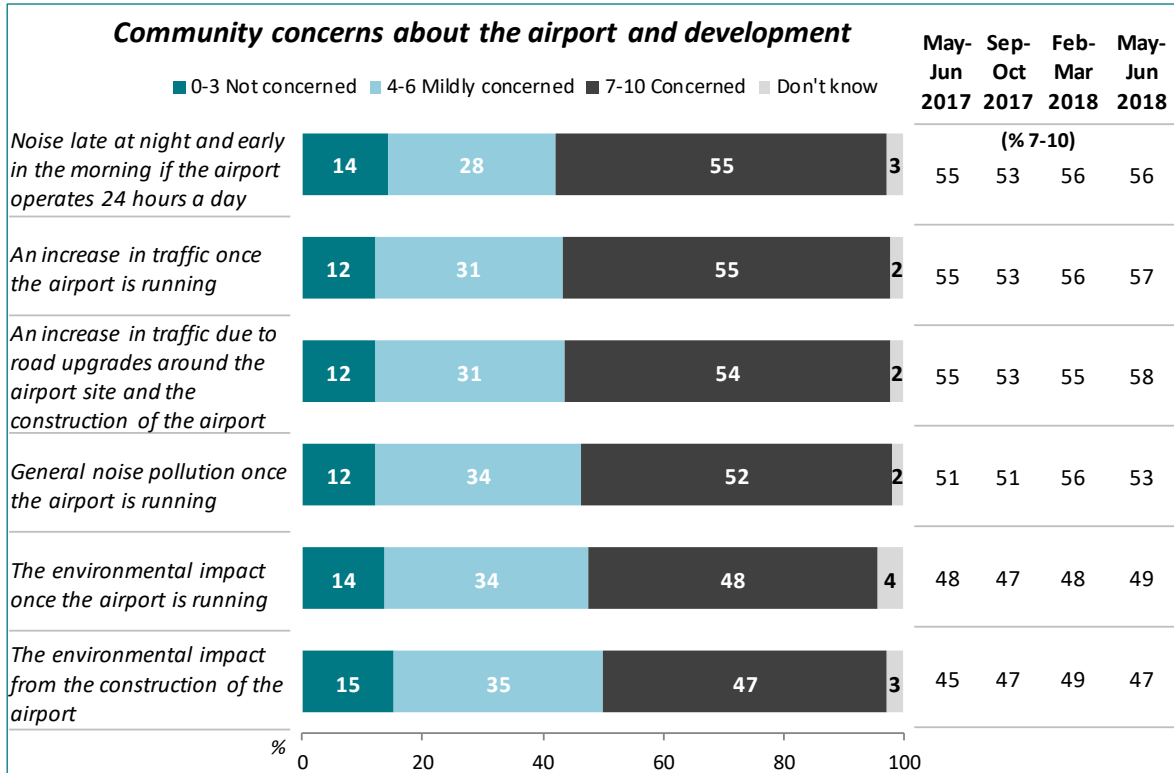
Base: All (Mar-Apr 19, n=1,008; May-Jun 18, n=903)

4.3.4. Potential concerns about environmental impacts

Concerns of residents were measured with a range of impacts of the new airport development on traffic, noise and other environmental issues. Over half of residents surveyed in May-June 2018 continued to be concerned (rating 7-10) about increases in traffic and noise (Figure 9):

- ‘an increase in traffic due to road upgrades during the construction phase’ (54%)
- ‘an increase in traffic once the airport is running’ (55%)
- ‘noise late at night and early in the morning if the airport operates 24 hours a day’ (55%)
- ‘general noise pollution once the airport is running’ (52%).

Figure 9: Potential community concerns of the Western Sydney Airport development (Mar-Apr 2019, and comparison with May-Jun 2017, Sep-Oct 2017, Feb-Mar 2018 and May-Jun 2018)



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

There can be a rounding ‘error’ of ±1% when adding two or more percentage results

Base: All (Mar-Apr 19, n=1,008; May-Jun 18, n=903; Feb-Mar 18, n=613; Sep-Oct 17, n=615; May-Jun 17, n=1,244)

In March-April 2019, female residents continued to be more likely than male residents to express concern about all seven issues presented, averaging 11 percentage points higher (ranging from 10 to 13 percentage points). Examples of the differences (which were in the 12-13 percentage point range) were concern about the environmental impact:

- ‘from the **construction of the airport**’ (females: 53% vs. males: 41%)
- ‘**once the airport is running**’ (females 57% vs. males: 41%).

There were no significant differences measured between the regions in March-April 2019, nor from the May-June 2018 survey (Table 12).

Table 12: Potential community concerns about Western Sydney Airport development by region (Mar-Apr 2019, and comparison with May-Jun 2018)

Concern	Region							
	Mar-Apr 2019				Change from May-Jun 18			
	South West	Inner West	North West	West Central	South West	Inner West	North West	West Central
<i>Rated 7-10</i>	%	%	%	%	%	%	%	%
Noise late at night and early in the morning if the airport operates 24 hours a day	52	45	59	56	No significant changes			
An increase in traffic once the airport is running	59	42	59	53				
An increase in traffic due to road upgrades around the airport site and the construction of the airport	56	45	57	55				
General noise pollution once the airport is running	54	44	56	50				
The environmental impact once the airport is running	49	46	50	47				
The environmental impact from the construction of the airport	46	49	46	48				
Sample size	200	201	305	302				
Highlighting statistically significantly higher and lower results:	between regions in Mar-Apr 2019				comparing each region with May-Jun 18			

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 (Mar-Apr 19, n=1,008; May-Jun 18, n=903)

4.3.5. Additional analysis of benefits, concerns and environmental impacts

Additional analysis was conducted on the March-April 2019 results for the full set of benefits, concerns and environmental impacts, and the elements of personal benefit of the airport.

A principal components analysis was conducted on the statements about benefits and concern using the full 0-10 rating scale, and the personal benefits. This type of analysis identifies which statements have similar patterns of ratings. Three groupings of statements were identified:

- **benefits** the airport will bring (6 elements of Q8)
- environmental impact and overall **concerns** about impact on the area of the airport development (2 elements of Q8) and environmental impacts (Q9)
- **personal benefits**: average nomination of two statements (Q17).

The topics and the underlying statements are shown in Figure 10, along with comparisons of the main demographic groups on the average scores of the elements of each topic. The shading highlights significantly:

- higher (■) sentiment on the topic (i.e., greater benefit or greater impact/concern).
- lower (■) sentiment on the topic (i.e., less benefit or less impact/concern).

A regression analysis was also carried out to assess the relative importance of each of the three topics in driving favourability, when considered together. Among these three topics, the level of **agreement with benefits** of the airport had by far the strongest association with **being in favour of the airport**.

Key Measures

Figure 10: Comparison of average ratings on topics of impact of Western Sydney Airport development, by demographics (March-April 2019)

Demographic groups	Meeting needs, improvements and benefits More benefit ⇒	Environmental impacts and negative impact on area More impact/concern ⇒	Personal benefit of the airport More benefit ⇒
GENDER			
Male	7.4	5.6	0.3
Female	7.1	6.4	0.3
AGE (years)			
18-34	7.1	6.1	0.3
35-54	7.2	6.0	0.3
55+	7.5	5.8	0.3
REGION			
South West	7.2	6.2	0.4
Inner West	6.9	5.8	0.2
North West	7.3	6.0	0.4
West Central	7.4	5.9	0.3
CALD			
Yes	7.6	6.1	0.4
No	7.1	5.9	0.3
	Average rating (0-10)	Average rating (0-10)	Average rating (0-2)
Statements contributing most strongly to each dimension	<ul style="list-style-type: none"> - Necessary to support Western Sydney's growing population and economy - 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 	<ul style="list-style-type: none"> - Concern that building the airport would have a negative impact on Western Sydney - Worried that would make it harder to live and/or work in the area - General noise pollution once the airport is running - Increase in traffic once the airport is running - Increase in traffic due to road upgrades during construction - Noise late at night and early in the morning 24 hours a day - Environmental impact once the airport is running - Environmental impact from the construction of the airport 	<ul style="list-style-type: none"> - I will personally benefit from using the Western Sydney Airport when it is operating - I will personally benefit from improved transport links and roads in Western Sydney associated with Western Sydney Airport

Base: March-April 2019

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

Key differences between the groups:

Benefits (77% contribution to relationship with favourability)

- **Greater** benefits among **male residents**
- Benefits **increasing** with **age**
- **Greater** benefits among residents from culturally and linguistically diverse communities.⁴

Concerns/impacts on area (16% contribution)

- **Greater** concern among **female** residents
- A trend for concern to **reduce** with **age**

Personal benefits (7% contribution)

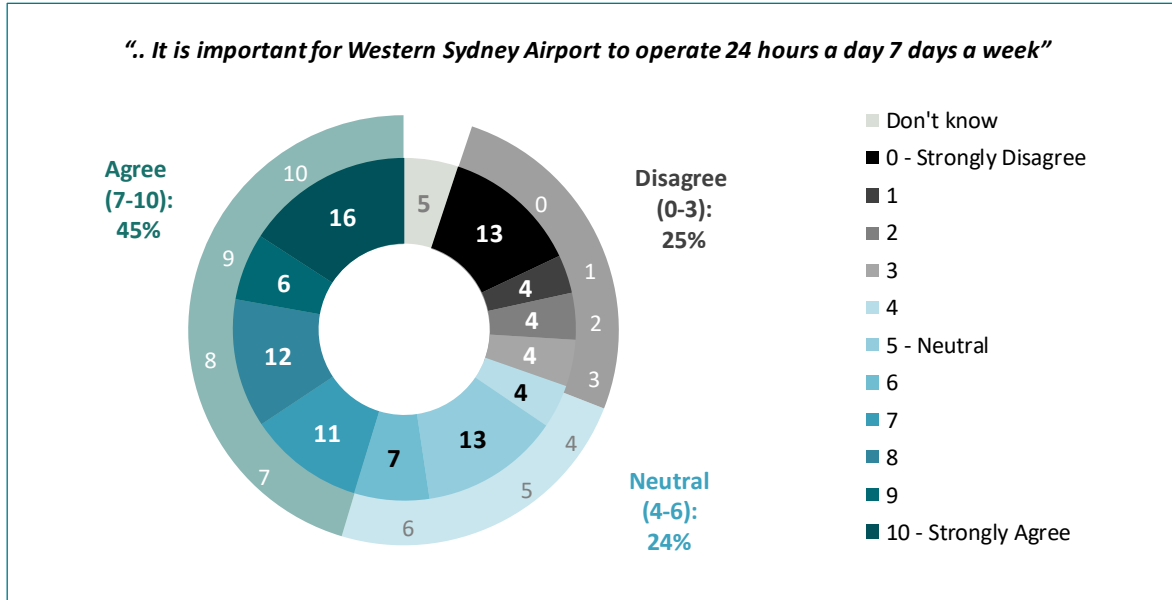
- **Greater** benefit in **South West** and **North West** regions
- **Greater** benefit among residents from culturally and linguistically diverse communities.³

⁴ The measured differences for residents from culturally and linguistically diverse communities remained when taking into account age.

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

Residents rated the importance of the new airport operating 24 hours a day, 7 days a week. Close to half (45%) of residents in March-April 2019 agreed (rating 7-10) that it was important (Figure 11).

Figure 11: Perception of importance of the airport operating 24 hours a day, 7 days a week (Mar-Apr 2019)



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

There can be a rounding 'error' of ±1% when adding two or more percentage results

Base: All (n=1,008)

Agreement in the two 2018 surveys (40–42%) had been relatively low compared with the average of surveys during 2015 to 2017 (averaging 47%) (Table 13). The result in March-April 2019 (45%) brought agreement back to a similar level seen in 2017 (45 to 47%). One in four (25%) continued to disagree with the importance of 24-hour operations. This level has remained around 25% since May-June 2018 (27%), and was higher than the earlier surveys from June 2015 to December 2016 (17% to 20%). The result in March-April 2019 (25%) was above this average. Over a quarter (29%) of residents in March-April 2019 were less decided on the issue (rating 4-6 or 'don't know').

Table 13: Perception of importance of the airport operating 24 hours a day, 7 days a week, by waves (Jun 2015 to Mar-Apr 2019)

Importance of the airport operating 24/7											
Agreement	Nov 2014	Jun 2015	Dec 2015	Apr 2016	Aug 2016	Dec 2016	May-Jun 2017	Sep-Oct 2017	Feb-Mar 2018	May-Jun 2018	NEW BENCHMARK Mar-Apr 2019
Rated 0-10	%	%	%	%	%	%	%	%	%	%	%
0-3 Disagree		17	17	20	19	19	27	25	31	25	25
4-6 Neutral		29	24	27	26	24	24	24	26	27	24
7-10 Agree	NA	46	51	45	47	48	45	47	40	42	45
Don't know		8	8	8	8	9	4	4	4	6	5
Sample size		513	502	499	505	503	1244	615	613	903	1008

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

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

There can be a rounding 'error' of ±1% when adding two or more percentage results

Shading highlights statistically significantly higher and lower results between waves

Key Measures

In March-April 2019, female residents (31%) were again more likely than male residents (20%) to disagree with the importance of 24-hour operation (Table 14). In contrast, male residents were marginally more likely to agree (50% vs. 41%) or be neutral (27% vs. 22%). Residents aged 55 years and over (39%) were again also more likely to disagree, particularly compared with those aged 18-34 years (13%); and with the corresponding difference largely in agreement, with the younger group the most likely to agree (53% vs. 36%). The lower disagreement among culturally and linguistically diverse residents (18% vs. 29% among other residents) continued the pattern seen in earlier surveys in 2017 and 2018.⁵

Table 14: Perception of importance of the airport operating 24 hours a day, 7 days a week, by demographics (Mar-Apr 2019)

Agreement	TOTAL	Gender		Age			Location				Culturally and Linguistically Diverse	
		Male	Female	18-34	35-54	55+	South West	Inner West	North West	West Central	Yes	No
<i>Rated 0-10</i>	%	%	%	%	%	%	%	%	%	%	%	%
0-3 Disagree	25	20	31	13	26	39	24	22	31	22	18	29
4-6 Neutral	24	27	22	29	23	22	28	29	19	25	21	26
7-10 Agree	45	50	41	53	46	36	45	40	46	46	55	40
Don't know	5	3	7	6	5	3	3	9	4	6	6	5
Sample size	1008	487	520	358	347	302	200	201	304	302	293	702

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

Base: All (n=1,008)

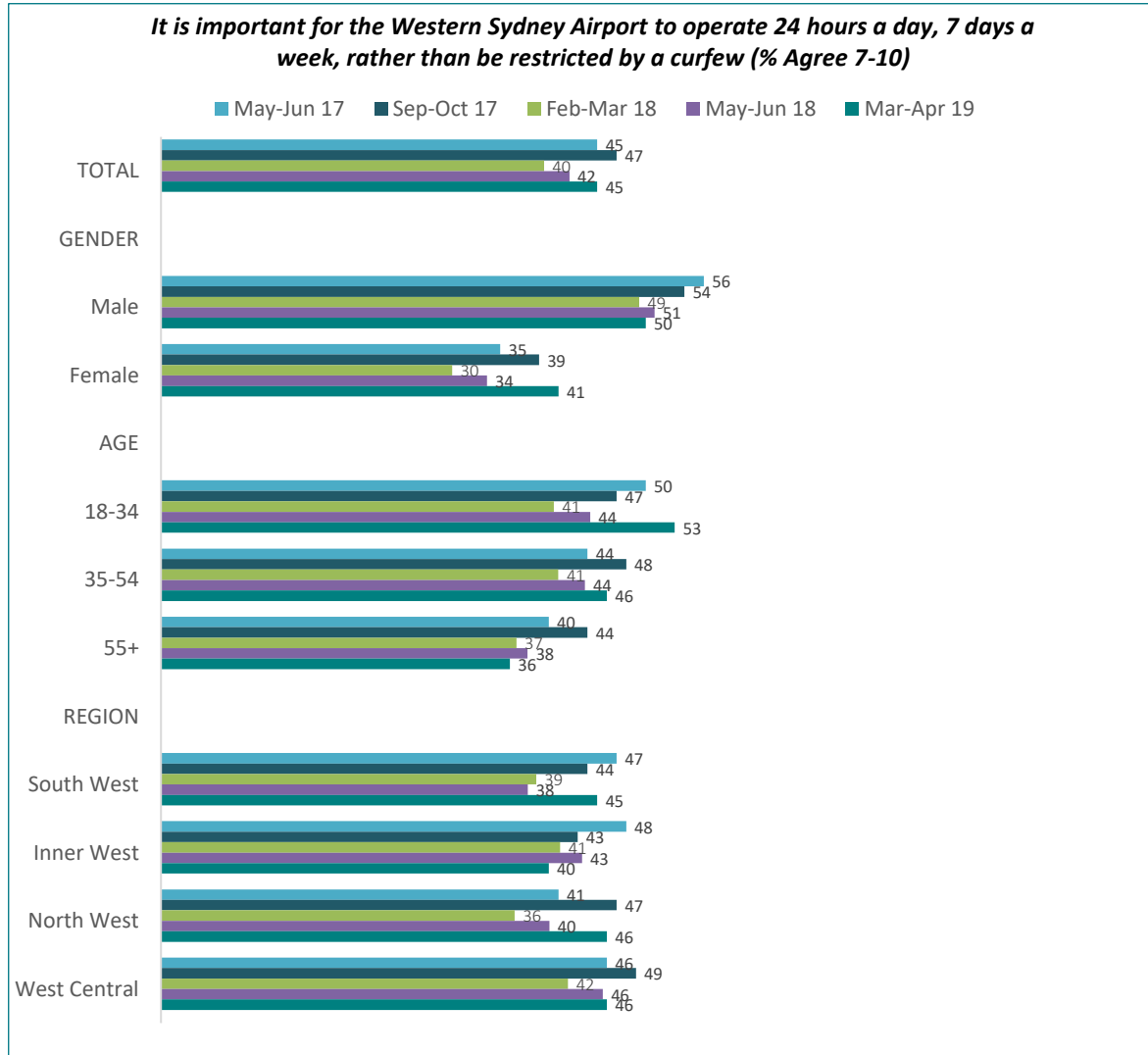
There can be a rounding 'error' of $\pm 1\%$ when adding two or more percentage results

Shading highlights statistically significantly higher and lower results between groups

⁵ The difference associated with CALD was maintained when also taking into account age

Agreement in March-April 2019 showed an increasing trend over the 2018 surveys among female residents, residents aged 18-34 years and 35-54 years, and residents in South West region and North West region (Figure 12). The regions were at a similar overall level in March-April 2019, as noted above, while male residents have been consistently more positive in recent surveys.

Figure 12: Agreement with importance of the airport operating 24 hours a day, 7 days a week, by demographics (May-Jun 17 to Mar-Apr 19)



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

Base: All (Mar-Apr 19, n=1,008; May-Jun 18, n=903; Feb-Mar 18, n=613; Sep-Oct 17, n=615; May-Jun 17, n=1,244)

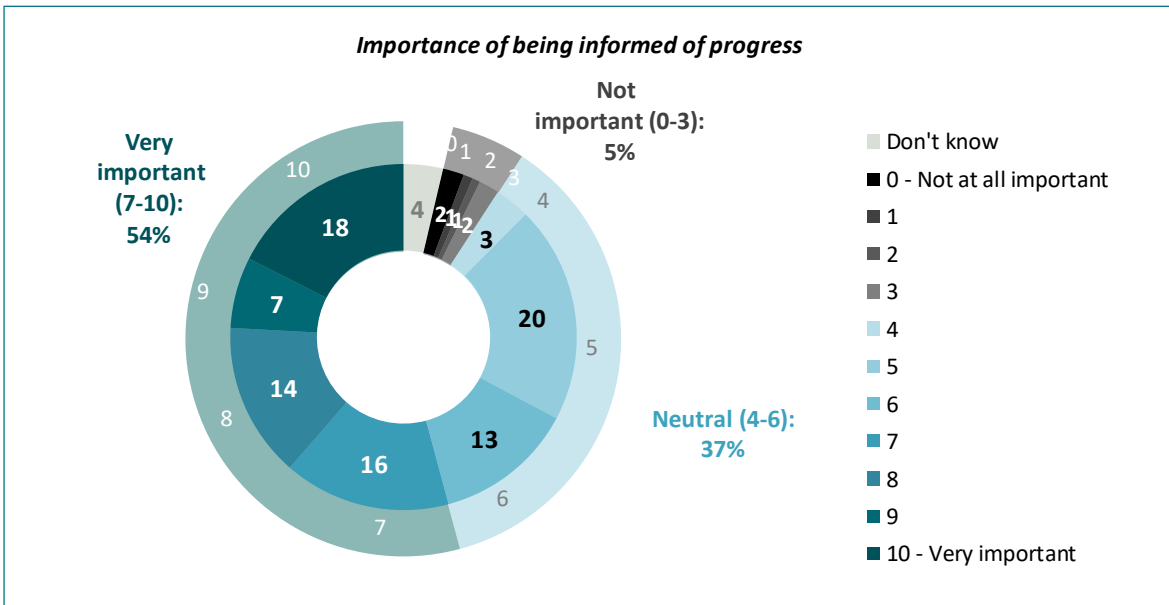
Shading highlights statistically significantly higher and lower results between waves

4.5. Communications

4.5.1. Importance of being informed about progress of the Airport’s development

The majority (54%) of residents in March-April 2019 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 (5%) considering that it was not important (rating 0-3) (Figure 13). The level of importance was marginally lower than the average across the surveys back to 2014 (60%) (Table 15).

Figure 13: Perception of importance of being informed about progress of the Western Sydney Airport’s development (Mar-Apr 2019)



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

Base: All (n=1,008)

There can be a rounding ‘error’ of ±1% when adding two or more percentage results

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

Importance*	Being informed about progress										
	Nov 2014	Jun 2015	Dec 2015	Apr 2016	Aug 2016	Dec 2016	May-Jun 2017	Sep-Oct 2017	Feb-Mar 2018	May-Jun 2018	NEW BENCHMARK Mar-Apr 2019
Rated 0-10	%	%	%	%	%	%	%	%	%	%	%
0-3 Not important	9	7	7	6	8	7	8	7	10	8	5
4-6 Neutral/Don't know	33	29	31	34	33	31	33	34	30	32	40
7-10 Important	58	64	62	60	59	62	59	57	60	56	54
Sample size	501	513	502	499	505	503	1244	615	613	903	1008

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)

There can be a rounding ‘error’ of ±1% when adding two or more percentage results

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

Differences measured on importance between the demographic groups in March-April 2019 focused on age and region (Table 16):

- importance increased with age from around half (48%) of residents aged 18-34 years up to over three in five (63%) residents aged 55 years and over
- residents in Inner West region were least likely to consider it as important (41%) with residents of South West region having marginally the greatest interest (61%), followed by North West (57%) and West Central (54%).

There were no substantial changes from May-June 2018 for each region on ratings of importance.

Table 16: Importance of being informed about progress, by demographics (Mar-Apr 2019)

Importance	TOTAL	Gender		Age			Location				Culturally and Linguistically Diverse	
		Male	Female	18-34	35-54	55+	South West	Inner West	North West	West Central	Yes	No
Rated 0-10	%	%	%	%	%	%	%	%	%	%	%	%
0-3 Not important	5	5	6	5	6	5	3	8	6	5	5	6
4-6 Neutral	37	37	36	41	38	31	33	44	35	37	31	39
7-10 Important	54	55	53	48	53	63	61	41	57	54	61	51
Don't know	4	3	5	6	3	1	3	7	3	4	2	4
Sample size	1008	487	520	358	347	302	200	201	304	302	293	702

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?

There can be a rounding 'error' of ±1% when adding two or more percentage results

Base: All (n=1,008) Shading highlights statistically significantly higher and lower results between groups

4.5.2. Relationships between importance of being informed and other key measures

When considering all residents rating positively (6-10) on the importance scale, the incidence increased to two-thirds (67%). The level of importance of being informed about progress was also found to be related to a number of other key measures about airport. Residents who considered it more important were more likely to (Table 17):

- report they knew more about the airport
- be in favour of the airport
- consider that the benefits would outweigh any negative impacts
- consider it important for the airport to operate 24/7.

Residents rating being informed as more important were also more likely to disagree that they were concerned that building the airport would have a negative impact on Western Sydney.

Table 17: Rating of key measures by importance of being informed of progress (Mar-Apr 2019)

Measure	Rating	Being kept informed of progress			
		Low importance (0-4)	Neutral (5)	Moderate importance (6-8)	Higher importance (9-10)
		%	%	%	%
Level of awareness	Great deal/quite a lot	29	36	47	58
In favour	7-10 agree	54	50	72	71
Positive benefits would outweigh any negative impacts	7-10 agree	47	44	66	71
Operate 24/7	7-10 important	36	36	50	52
Concern of a negative impact	0-3 disagree	34	31	38	45
Sample size		87	206	437	237

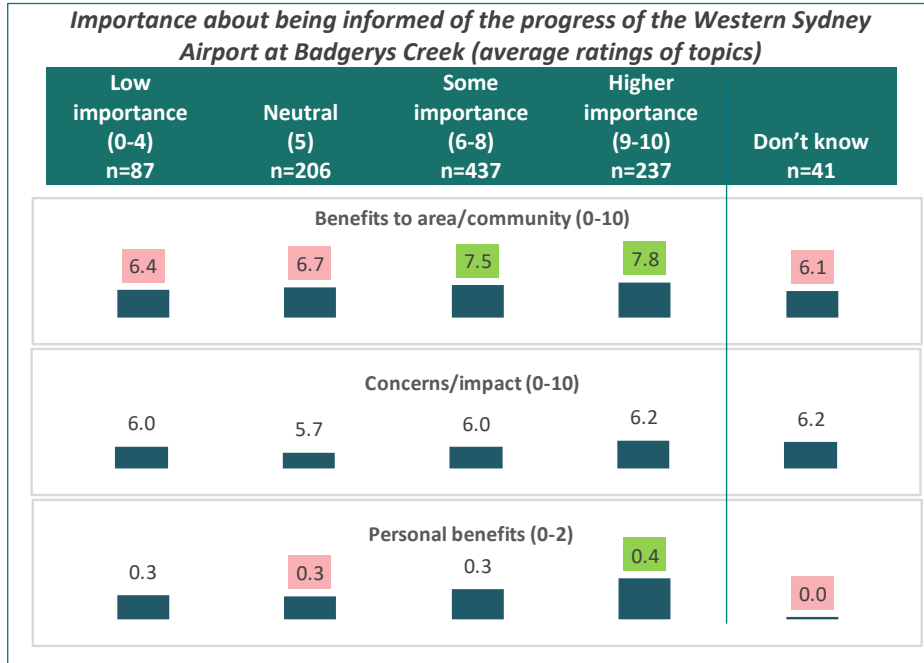
Q14. Using a scale of 0 to 10, where 0 means not at all important and 10 means very important, please indicate how you feel personally about being informed about the progress of the Western Sydney Airport at Badgerys Creek?

Base: All (n=1,008) There can be a rounding 'error' of ±1% when adding two or more percentage results

Shading highlights statistically significantly higher and lower results between groups

Greater importance of being kept informed was also related to more positive sentiment toward the benefits that the airport will bring to the area and community and perception of personal benefits (see topics defined in Section 4.3.5) (Figure 14). There were no significant differences between levels of importance and the topic of environmental impact and/overall concerns about impact on the area of the airport development

Figure 14: Ratings of topics of benefits and concerns by importance being informed about progress (Mar-Apr 2019)

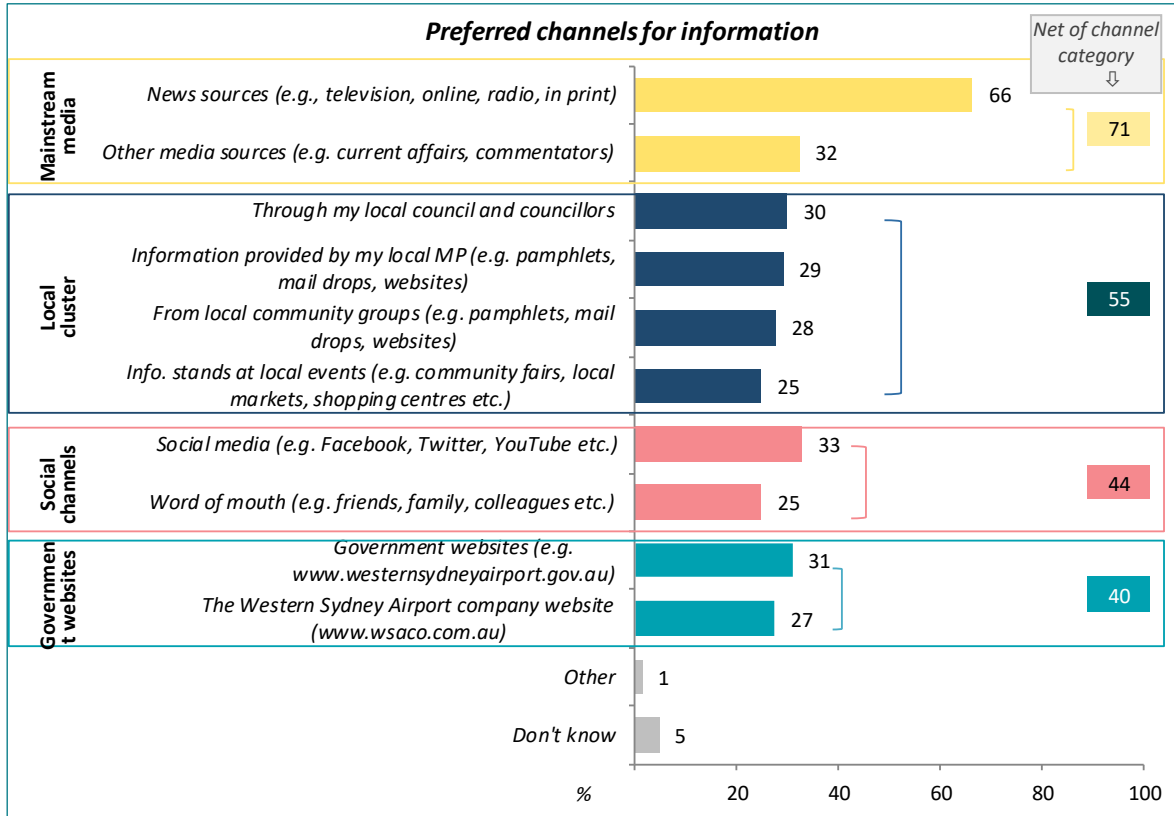


Q14. indicate how you feel personally about being informed about the progress of the Western Sydney Airport at Badgerys Creek?
 TOPICS: Average ratings of benefits to the area, concerns about the airport and personal benefits (see Section 4.3.5)
 Base: All (n=1,008) Shading highlights statistically significantly higher and lower results between groups

4.5.3. Preferred channels

Residents who rated some level of importance in being kept informed of progress (67%, rating 6-10) were asked where they would want to get their information from, selecting from a list (Figure 15).

Figure 15: Preferred communication channels for information about airport’s development (Mar-Apr 2019)



Q15. Where would you want to get information about Western Sydney Airport? Please select all that apply.
 Base: Those who provided a rating of 6-10 on importance in being informed of the airport’s development (n=674)
 Highlighting statistically significantly higher and lower results between waves

The list was streamlined from that used in the previous survey series. Mainstream media (71% overall), in particular news sources (66%), continued to be the most preferred type of communication channel grouping. A local source (55% overall) was the next most preferred channel grouping including local council, local MP, community groups or information stands (ranging over 25-30% nomination). A social channel (44%) or government/airport company website (40%) were less nominated groupings.

There were no significant differences in preferred channels between the regions, noting that this was being asked of those who rated positively (6-10) about the importance of being kept informed (Table 18). There was a trend for residents in South West region and North West region to be more interested in receiving information from their local council.

Table 18: Preferred channels for information about airport’s development, by region (Mar-Apr 2019)

Preferred channels	Region			
	South West	Inner West	North West	West Central
	%	%	%	%
News sources (e.g., television, online, radio, in print)	62	67	69	67
Other media sources (e.g. current affairs, commentators)	28	25	34	36
Through my local council and councillors	38	19	36	24
Information provided by my local MP (e.g. pamphlets, mail drops, websites)	27	23	33	29
From local community groups (e.g. pamphlets, mail drops, websites)	27	21	32	26
Information stands at local events (e.g. community fairs, local markets, shopping centres)	20	17	27	27
Social media (e.g. Facebook, Twitter, YouTube)	39	26	30	34
Word of mouth (e.g. friends, family, colleagues etc.)	32	22	23	24
Government websites	27	29	34	31
The Western Sydney Airport company website	26	20	31	28
Other	1	0	3	1
Don't know	5	5	5	4
Sample size	145	114	208	207

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

Base: Those who provided a rating of 6-10 on importance in being informed of the airport’s development (n=674)

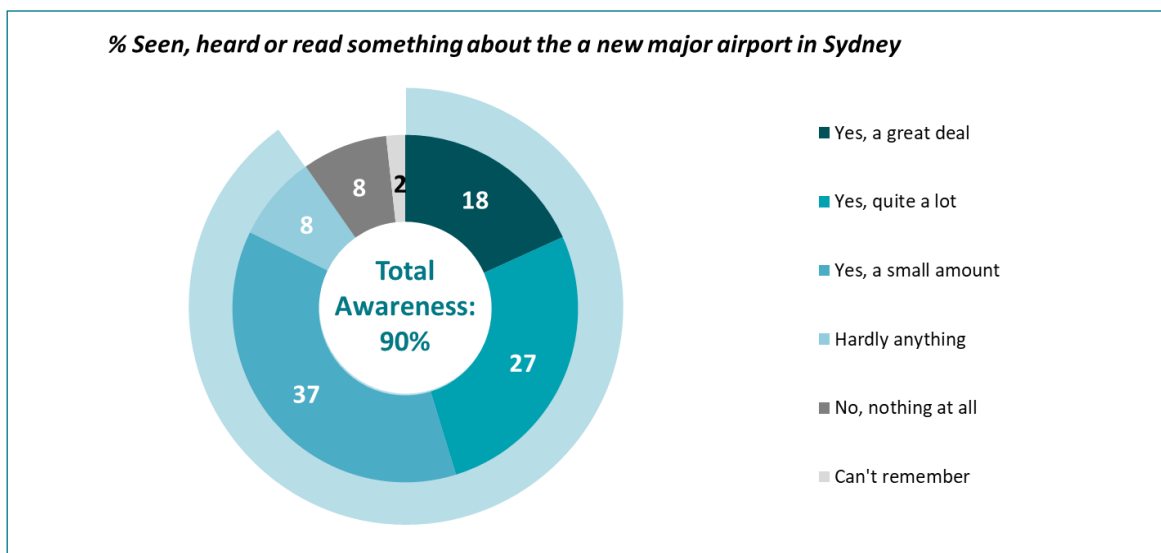
Highlighting statistically significantly higher and lower results between waves

5. Other Measures

5.1. Awareness of Western Sydney International Airport

A large majority (90%) of residents in March-April 2019 were aware of the development of a new major airport in Sydney (Figure 16). This incidence has been within a relatively narrow range (87% to 91%) in surveys since May-June 2017. Close to half (45%) of residents considered they knew quite a lot/a great deal about the airport, within the range measured since 2017 (42-50%).

Figure 16: Awareness of a new major airport in Sydney (Mar-Apr 2019)



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

Base: All (n=1,008)

There can be a rounding 'error' of $\pm 1\%$ when adding two or more percentage results

Key differences among the demographic groups in March-April 2019 were for residents aged 55 years and over (55% quite a lot/great deal), male residents (50%) and residents in South West region (55%) to be more likely to consider they knew at least 'quite a lot' about the development (Table 19). Residents in Inner West were least likely (34%) to report this level of awareness.

Table 19: Awareness of a new major airport in Sydney, by demographics (Mar-Apr 2019)

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	90	91	89	85	90	96	92	90	93	87	87	91
Great deal	18	21	16	20	16	18	21	12	23	16	17	19
Quite a lot	27	29	25	21	24	37	34	22	26	26	24	28
Quite a lot/a great deal	45	50	40	41	40	55	55	34	48	41	41	47
Small amount	37	34	40	35	42	34	33	42	37	37	35	37
Hardly anything	8	7	9	10	8	6	3	13	7	9	11	7
Nothing at all	8	7	8	11	8	3	5	8	6	10	11	6
Don't know	2	2	3	4	3	1	3	2	1	3	2	2
Sample size	1008	487	520	359	347	302	200	201	305	302	293	703

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

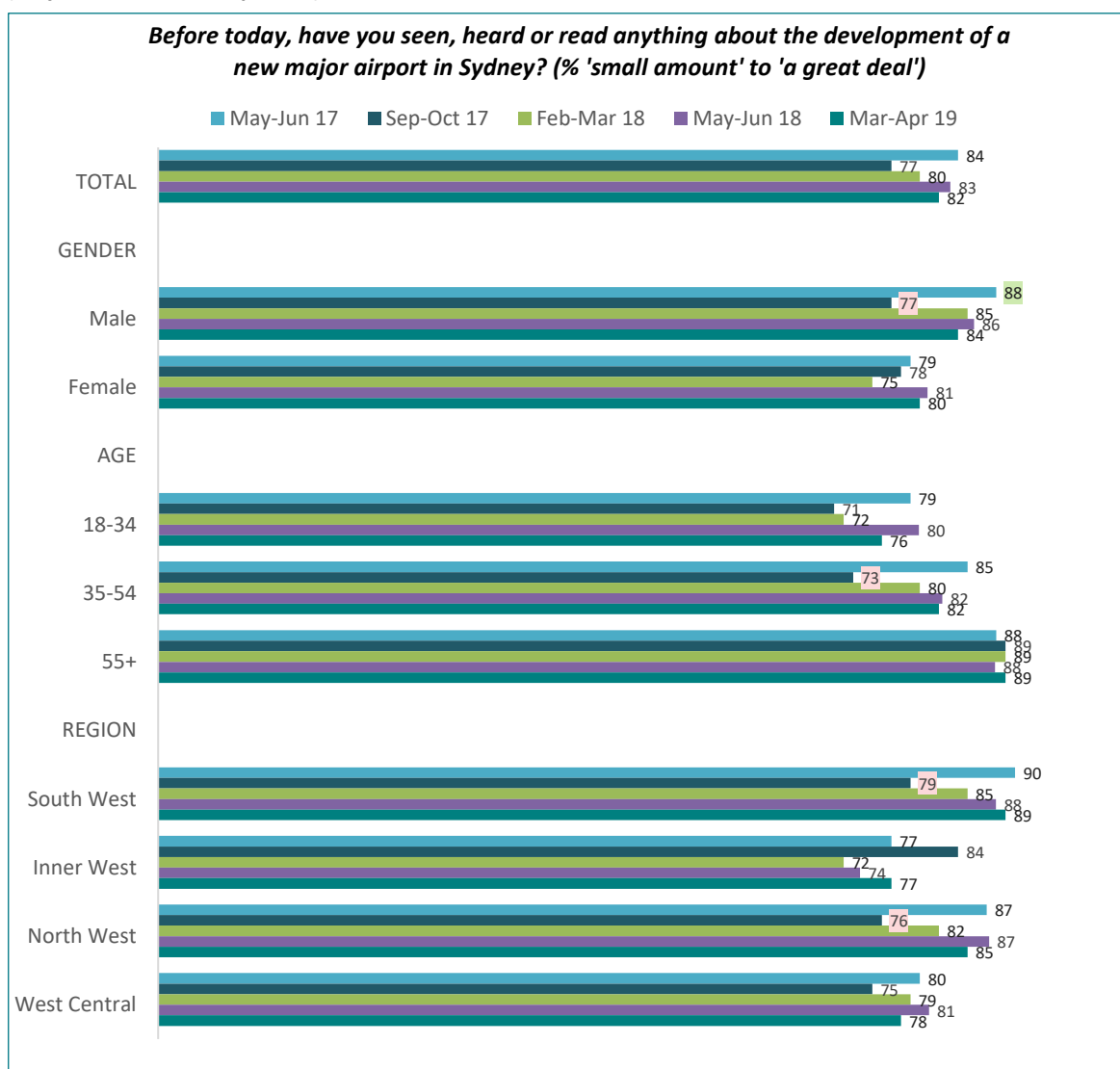
Base: All (n=1,008)

There can be a rounding 'error' of $\pm 1\%$ when adding two or more percentage results

Shading highlights statistically significantly higher and lower results between groups

Awareness of at least 'a small amount' had peaked in May-June 2017 (84%), following announcement of the airport going ahead. This was followed by some decline in September-October 2017 (77%) (Figure 17). This level of awareness increased in 2018 and has now been maintained in March-April 2019 (82%) close to the earlier peak. This pattern was seen in most of the demographic groups (Figure 17), although residents aged 55 years and over in particular have remained consistently high since 2017 (a range of 88% to 89%). The situation in March-April 2019 is for higher awareness of this level in the older age group, as well as in South West region and North West region.

Figure 17: Awareness of a new major airport in Sydney: know at least a small amount, by wave and demographics (May-Jun 2017 to Mar-Apr 2019)



Q1. Before today, have you seen, heard or read anything about the development of a new major airport in Sydney?
 Base: All (Mar-Apr 2019, n=1,008; May-Jun 18, n=903; Feb-Mar 18, n=613; Sep-Oct 17, n=615; May-Jun 17, n=1,244)
 Shading highlights statistically significantly higher and lower results between groups

Residents who were aware of a new major airport in Sydney were asked, unprompted, what they had heard about the development (Figure 18). Half (50%) of these residents in March-April 2019 mentioned something related generally to the airport going ahead, with some reference to the naming of the airport. Around half (54%) of the group mentioned something about the location of the airport, including most referencing Badgerys Creek specifically (35%).

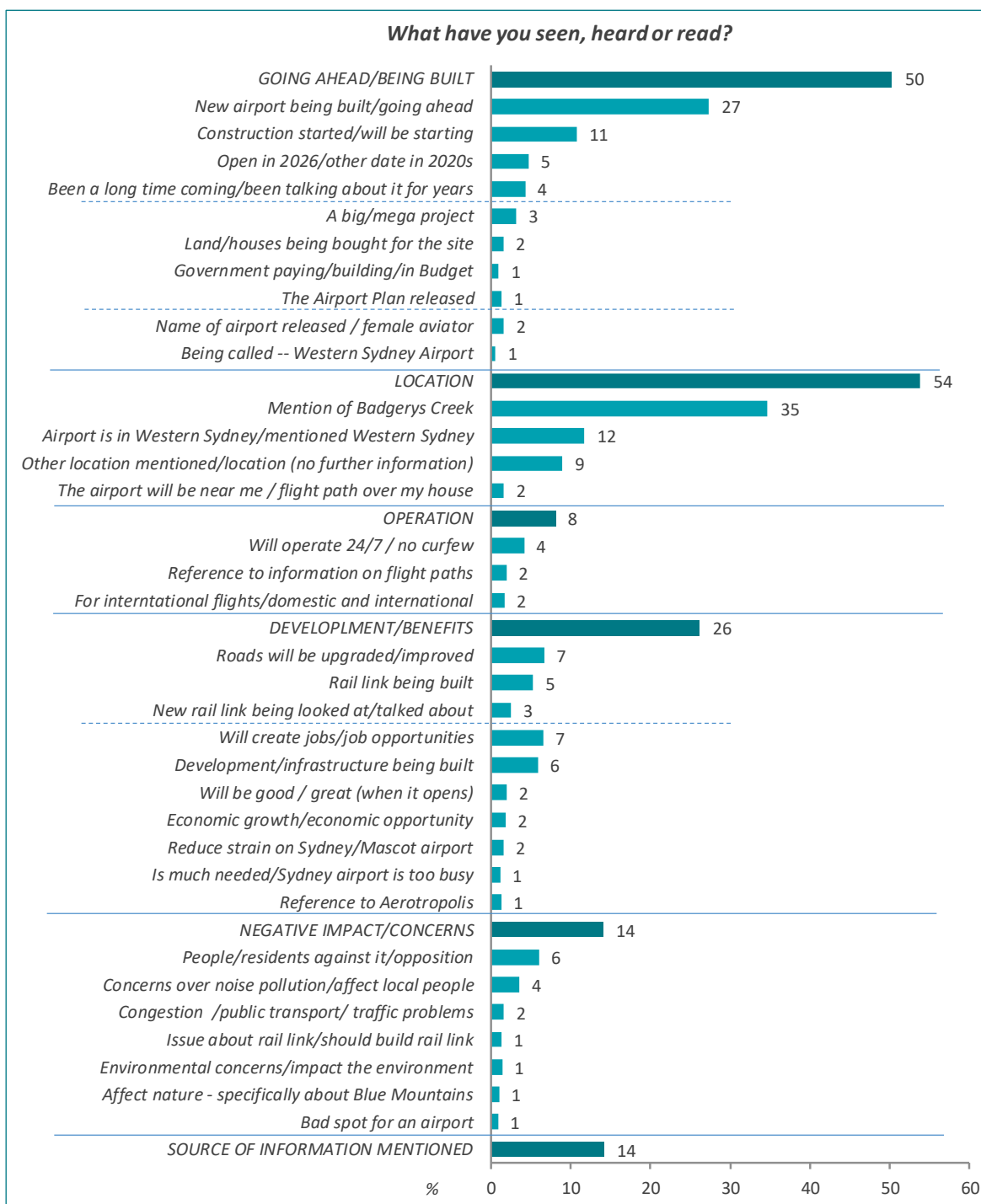
More specific detail was provided through some reference to how the airport will operate (8%), including reference to no curfew (4%), flight paths (2%), international flights (2%); and by one in

Other Measures

four (26%) mentioning an aspect of development and benefits, including transport (roads – 7%, rail – 8%, economic/jobs – 3%) and infrastructure (6%, plus some reference to Aerotropolis – 1%).

In addition, a minority (14%) referred to a negative impact of the airport, or other concern about the airport, including that there is opposition (6%) and concerns about noise affecting residents (4%).

Figure 18: Unprompted awareness of the new airport's developments (Mar-Apr 2019)



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

Base: Those who have seen, heard or read anything about the development of a new major airport in Sydney (n=911)

First category in each section is a net of the sub-categories

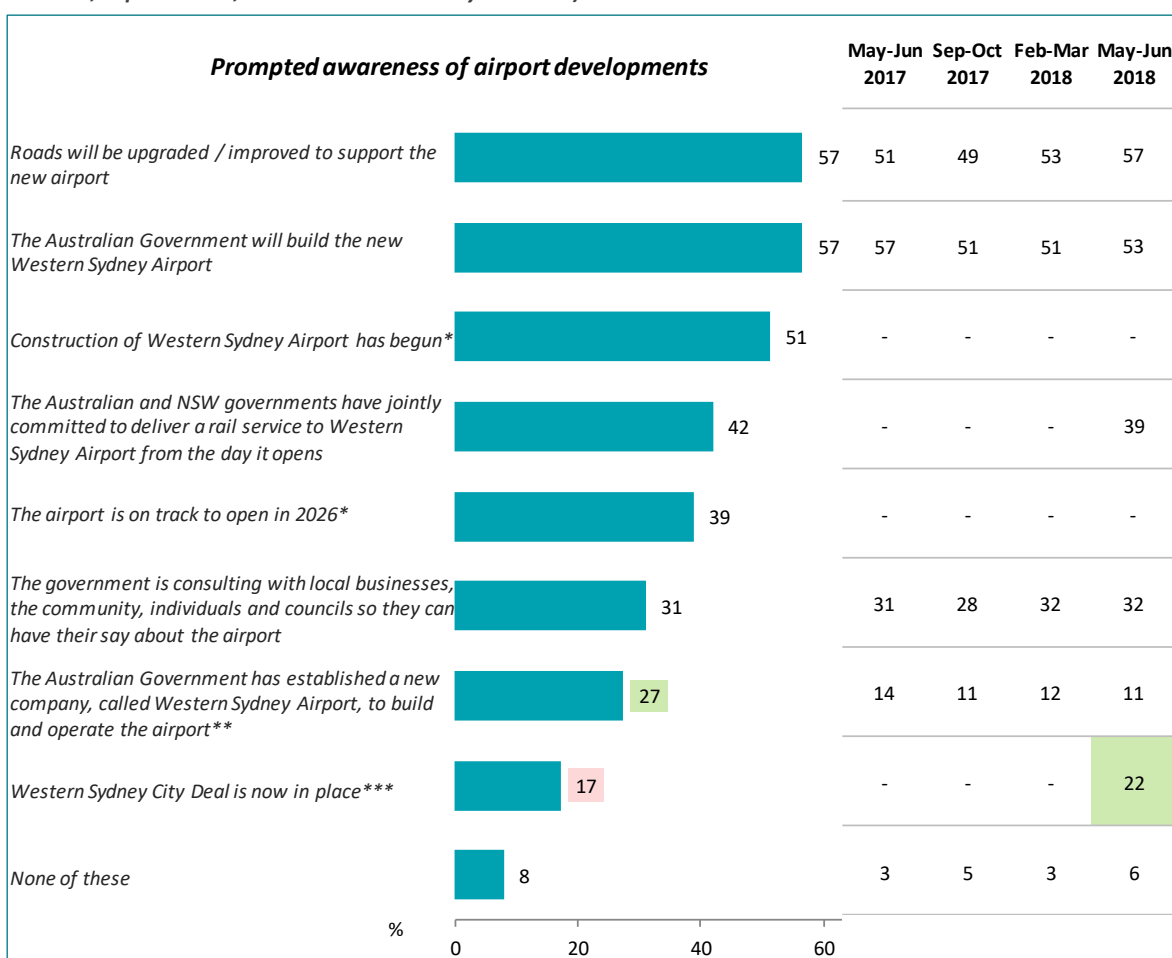
There can be a rounding 'error' of ±1% when adding two or more percentage results

When prompted with particular elements of the new major airport in Sydney (Figure 19), over half indicated they were aware that the Australian Government would be building the new airport (57%), that upgrades to roads were being made to support the airport (57%). Other prompted awareness included construction beginning (51%), delivery of a rail service (42%) and the airport’s 2026 opening date (39%).

Lower awareness was around consultation (31%) and the Western Sydney Airport company (27%), with lowest awareness of the Western Sydney City Deal being in place (17%).

Awareness of the new company (27%) had increased from May-Jun 2018 (11%), when it had been referred to as WSA Co. The increase, however, could be related to the new company name, *Western Sydney Airport*, being more generic and therefore more likely to be perceived as applying to the airport company.

Figure 19: Prompted awareness of the new major airport’s developments (Mar-Apr 2019 and comparison with May-Jun 2017, Sep-Oct 2017, Feb-Mar 2018 and May-Jun 2018)



Q3. Which of the following aspects of the development of a new major airport in Sydney have you heard about before today?
 Base: Those who have seen, heard or read anything about the development of a new major airport in Sydney (n=911)

* Wording changed from previous surveys

** Previously referred to as “WSA Co”

*** Previously “Australian and NSW governments, together with eight local governments of Western Sydney, have signed the Western Sydney City Deal.”

Shading highlights statistically significantly higher and lower results between groups

Residents in South West Region were more likely to report awareness that construction of the airport had commenced (63%) and that the airport is on track to open in 2026 (50%) (Table 20). Residents in both South West region (63%) and North West region (62%) were also more likely to be aware of improvements to roads to support the airport. Residents in Inner West region were least aware on these elements.

Table 20: Awareness of a new major airport in Sydney, by region

Heard of developments	TOTAL	Region			
		South West	Inner West	North West	West Central
	%	%	%	%	%
Roads will be upgraded / improved to support the new airport	57	63	47	62	52
The Australian Government will build the new Western Sydney Airport	57	58	56	57	56
Construction of Western Sydney Airport has begun	51	63	41	55	46
The Australian and NSW governments have jointly committed to deliver a rail service to Western Sydney Airport from the day it opens	42	45	35	45	40
The airport is on track to open in 2026	39	50	29	39	36
The government is consulting with local businesses, the community, individuals and councils so they can have their say about the airport	31	29	26	30	34
The Australian Government has established a new company, called Western Sydney Airport, to build and operate the airport	27	36	23	28	25
Western Sydney City Deal is now in place	17	13	14	18	19
None of these	8	4	8	6	12
Sample size	911	185	183	281	262

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=911)

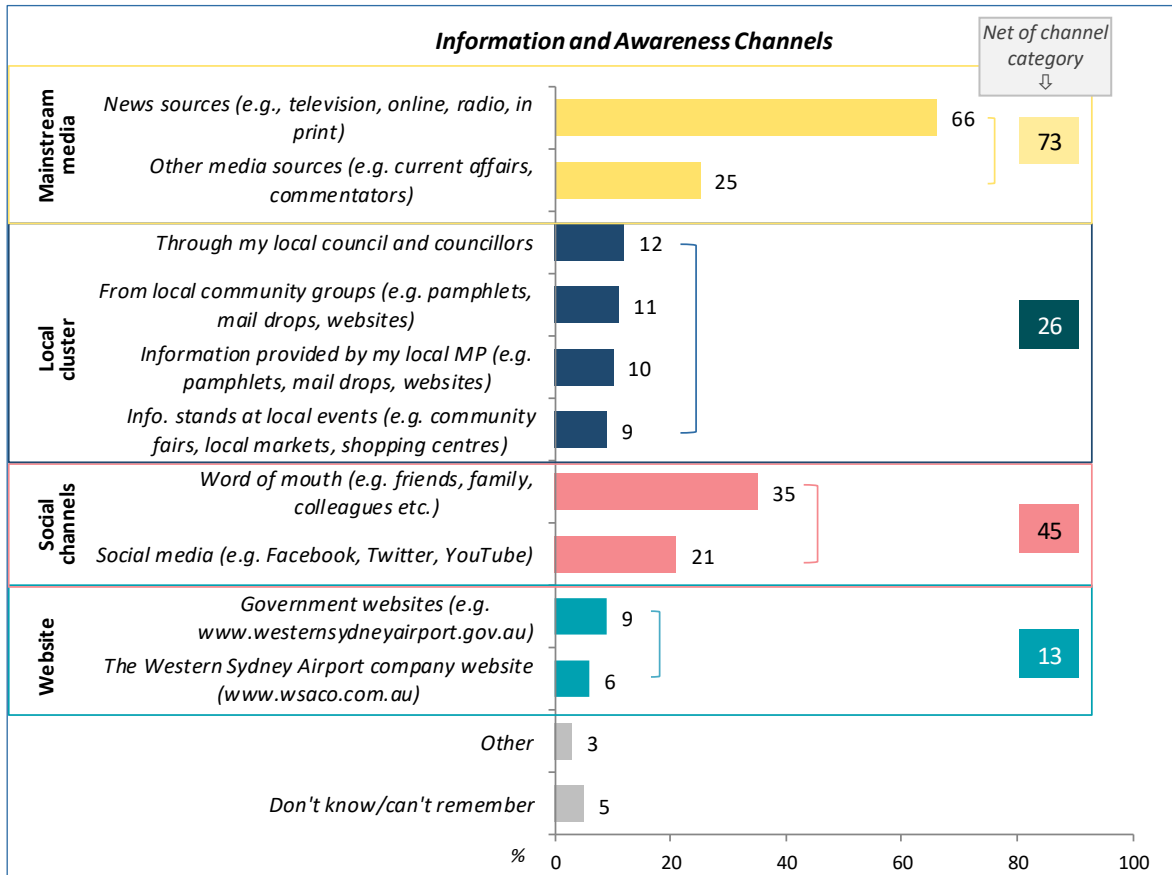
Shading highlights statistically significantly higher and lower results between groups

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. A list of channels was presented.

The most common type of channel in March-April 2019 was news sources, nominated by two-thirds (66%) of the group residents (Figure 20). Social contact (45%) was the next most common type of channel, either through word of mouth (35%) or social media (21%). Local channels, as a group, were nominated by one in four (26%) of those aware although individually they were of lower penetration (a range of 9% to 12%).

Figure 20: Channels of awareness of the development of a new major airport in Sydney Mar-Apr 2019



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=911)

Key differences between demographic groups in March-April 2019 (Table 21) were:

- access through **news sources** increased with age, and was lower for culturally and linguistically diverse residents
- access through **social media** decreased with age
- access through a **'local cluster'** channel was higher among residents in South West and North West regions.

Table 21: Channels of awareness of the development of a new major airport, by demographics (Mar-Apr 2019)

Channels	TOTAL	Gender		Age			Location				Culturally and Linguistically Diverse	
		Male	Female	18-34	35-54	55+	South West	Inner West	North West	West Central	Yes	No
	%	%	%	%	%	%	%	%	%	%	%	%
Mainstream media												
News sources (e.g. television, online, radio, in print)	66	67	66	48	66	87	62	62	68	69	59	70
Other media sources (e.g. current affairs, commentators)	25	26	24	20	20	36	27	19	29	23	20	28
Local cluster												
Through my local council and councillors	12	12	11	12	8	15	19	3	14	9	11	12
From local community groups (e.g. pamphlets, mail drops, websites)	11	10	12	12	9	12	16	4	16	7	12	11
Information provided by my local MP (e.g. pamphlets, mail drops, websites)	10	11	8	10	8	11	17	4	13	6	9	10
Information stands at local events (e.g. community fairs, local markets, shopping centres)	9	11	7	12	9	5	14	4	11	6	11	8
Social channels												
Word of mouth (e.g. friends, family, colleagues)	35	32	38	39	37	29	43	34	39	29	36	35
Social media (e.g. Facebook, Twitter, YouTube)	21	23	20	30	19	15	29	15	23	19	24	21
Government/airport websites												
Government websites (e.g. www.westernsydneyairport.gov.au)	9	12	6	10	11	6	11	7	8	11	11	9
The Western Sydney Airport company website (www.wsco.com.au)	6	8	4	5	7	5	9	4	7	4	8	5
Other	3	3	2	1	3	4	6	1	2	2	3	3
Don't know/Can't remember	5	6	4	7	6	2	4	9	4	6	5	5
Sample size	911	446	464	307	311	293	185	183	281	262	260	640

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=911)

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

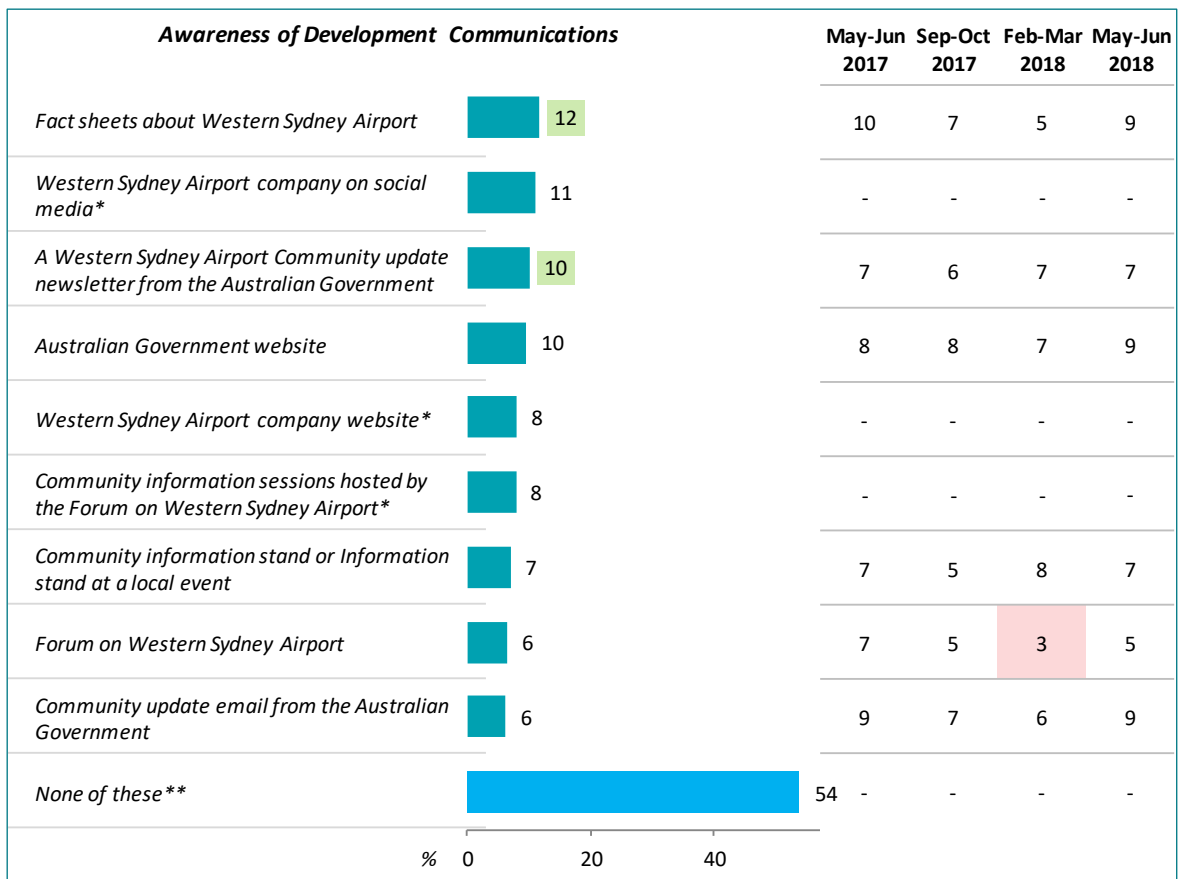
5.3. Awareness of Government Initiatives and Communications

Residents aware of a new 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 number of items was streamlined to nine in the March-April 2019 survey to establish a clearer set of communications as the project progresses.

The online survey included images of the communications, while the telephone survey had extended descriptions to assist with recognition.

Overall awareness of individual initiatives and communications in March-April 2019 ranged from 6% to 12%, with the fact sheets (12%) having most awareness, followed by Western Sydney Airport company social media (11%), community update newsletter (10%) and the Australian Government website (10%) (Figure 21). The fact sheets and newsletters nominated marginally higher than in earlier surveys in 2017 and 2018.

Figure 21: Awareness of Australian Government initiatives and communications (Mar-Apr 2019, and comparison with May-Jun 2017, Sep-Oct 2017, Feb-Mar 2018 and May-Jun 2018)



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

Base: seen, heard or read anything about the development of a new major airport in Sydney (n=911)

* New items

** Not shown for earlier surveys as a larger set of items were presented

Other Measures

There were no substantial differences between the region in awareness of initiatives and communications (Table 22). Residents in South West region were the most likely to nominate awareness overall (54% nominating any, and an average of 1.0) and residents of Inner West the least likely (41% nominating any, and an average of 0.6). In addition, there was a trend for residents in South West region, which includes residents immediately around the airport site, to report highest recall of WSA Co on social media (15%).

Table 22: Awareness of initiatives and communications from the Australian Government, by region (Mar-Apr 2019)

Heard of developments	Region				
	TOTAL	South West	Inner West	North West	West Central
	%	%	%	%	%
Fact sheets about Western Sydney Airport	12	12	7	14	12
Western Sydney Airport company on social media	11	15	8	9	11
A Western Sydney Airport Community update newsletter from the Australian Government	10	14	7	10	9
Australian Government website	10	12	6	10	10
Western Sydney Airport company website	8	8	6	8	9
Community information sessions hosted by the Forum on Western Sydney Airport	8	8	4	9	8
Community information stand or Information stand at a local event	7	9	11	6	5
Forum on Western Sydney Airport	6	9	5	6	6
Community update email from the Australian Government	6	10	3	6	6
None of these/Don't know	54	46	59	54	56
Sample size	911	185	183	281	262

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=911)

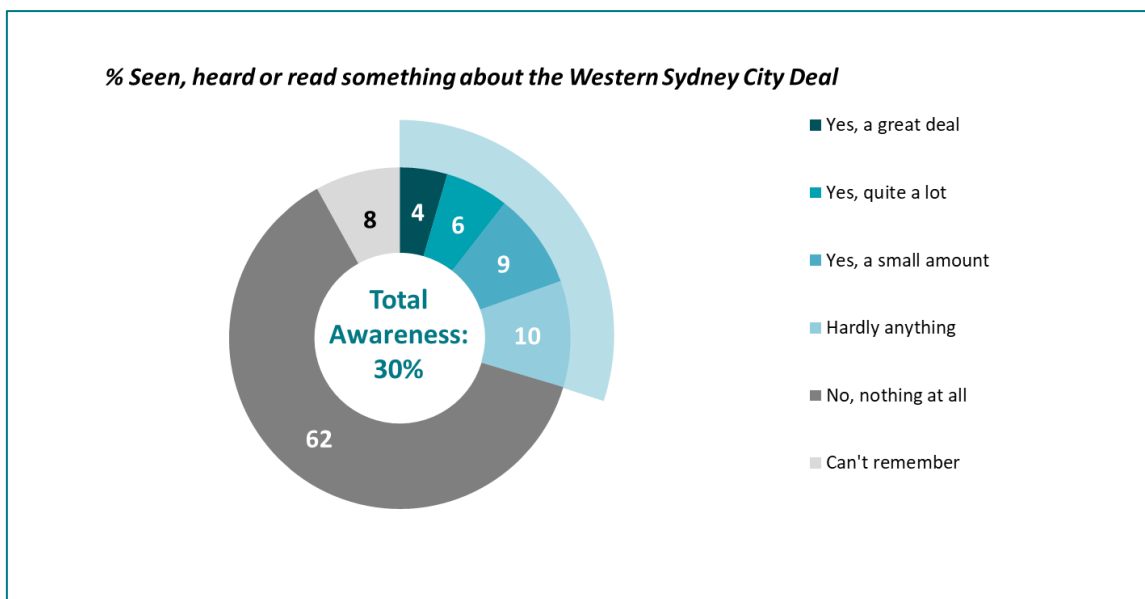
5.4. Awareness of Western Sydney City Deal and North South Rail Link

5.4.1. Western Sydney City Deal

Residents were asked about their awareness of the Western Sydney City Deal. Overall, nearly one third (30%) of residents reported having heard about the initiative, including one in five (20%) aware of at least a small amount (Figure 22).

Reported awareness of the Western Sydney City Deal was higher among male residents (36%) and highest among residents aged 18-34 years (36%), decreasing with age (Table 22). There were no significant differences measured by region.

Figure 22: Awareness of Western Sydney City Deal (Mar-Apr 2019)



Q27. Before today, have you seen, heard or read anything about the Western Sydney City Deal?
Base: All (n=1,008)

Table 23: Awareness of Western Sydney City Deal, by demographics (Mar-Apr 2019)

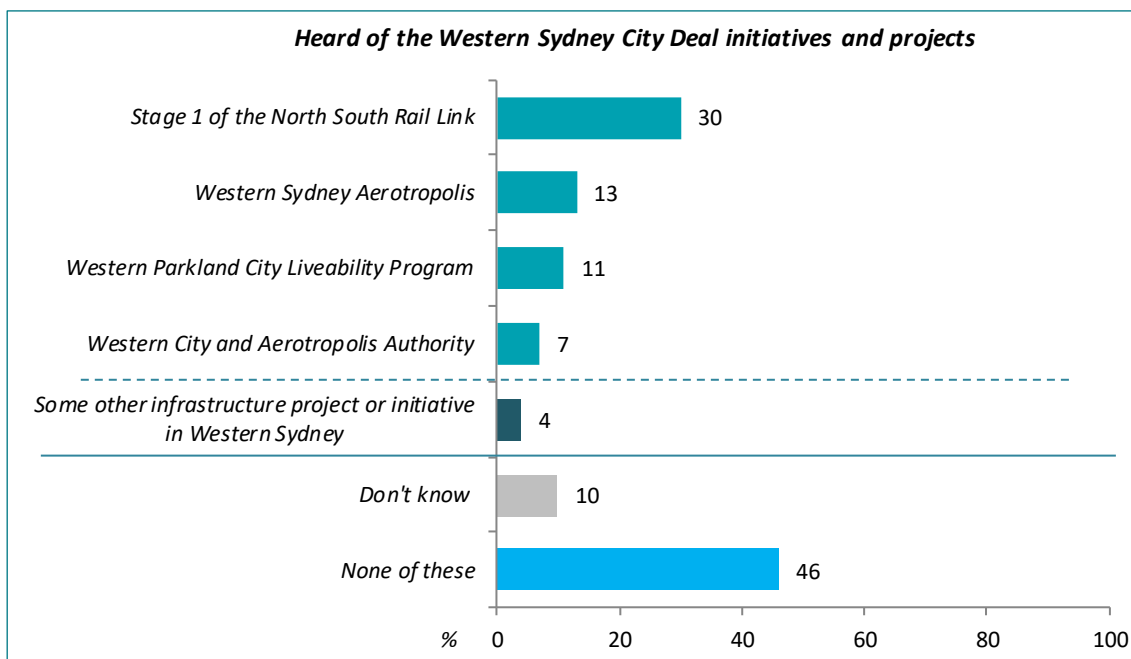
Awareness	Gender			Age			Region				Culturally and Linguistically Diverse	
	TOTAL	Male	Female	18-34	35-54	55+	South West	Inner West	North West	West Central	Yes	No
	%	%	%	%	%	%	%	%	%	%	%	%
Total Aware	30	36	24	42	25	21	30	30	28	30	34	28
Great deal	4	6	3	9	4	0	5	4	4	5	6	4
Quite a lot	6	7	4	11	4	2	10	6	4	6	7	5
Quite a lot/a great deal	10	14	7	19	8	2	15	10	8	10	13	9
Small amount	9	10	8	9	8	11	8	9	9	10	12	8
Hardly anything	10	12	8	14	9	8	7	11	12	10	9	11
Nothing at all	62	57	67	47	66	74	61	64	62	62	55	65
Don't know	8	7	9	11	9	5	9	6	9	8	11	7
Sample size	1008	487	520	359	347	302	200	201	305	302	293	703

Q27. Before today, have you seen, heard or read anything about the Western Sydney City Deal?
Base: All (n=1,008)

Shading highlights statistically significantly higher and lower results between groups

Residents were prompted with a list of initiatives and projects under the Western Sydney City Deal. These were presented regardless of overall awareness of the Deal, in order to cover specific recognition of these elements. Of the four elements presented, two-fifths (40%) of residents reported awareness of at least one (Figure 23). Awareness was greatest for the North South Rail Link (30%), while the two other projects presented were recognised by a small minority of residents: Western Sydney Aerotropolis (13%) and Western Parkland City Liveability Program (11%).

Figure 23: Awareness of the Western Sydney City Deal initiatives and projects (Mar-Apr 19)



Q28. Which of the following have you personally heard about before today? Please select all that apply.
Base: All (n=1,008)

There were no substantial differences in awareness between the regions (Table 24). There was a trend for residents in South West region to be more aware of the Western Sydney Aerotropolis (21% vs. 10-13% in the other regions).

Table 24: Awareness of the Western Sydney City Deal initiatives and projects, by region (Mar-Apr 19)

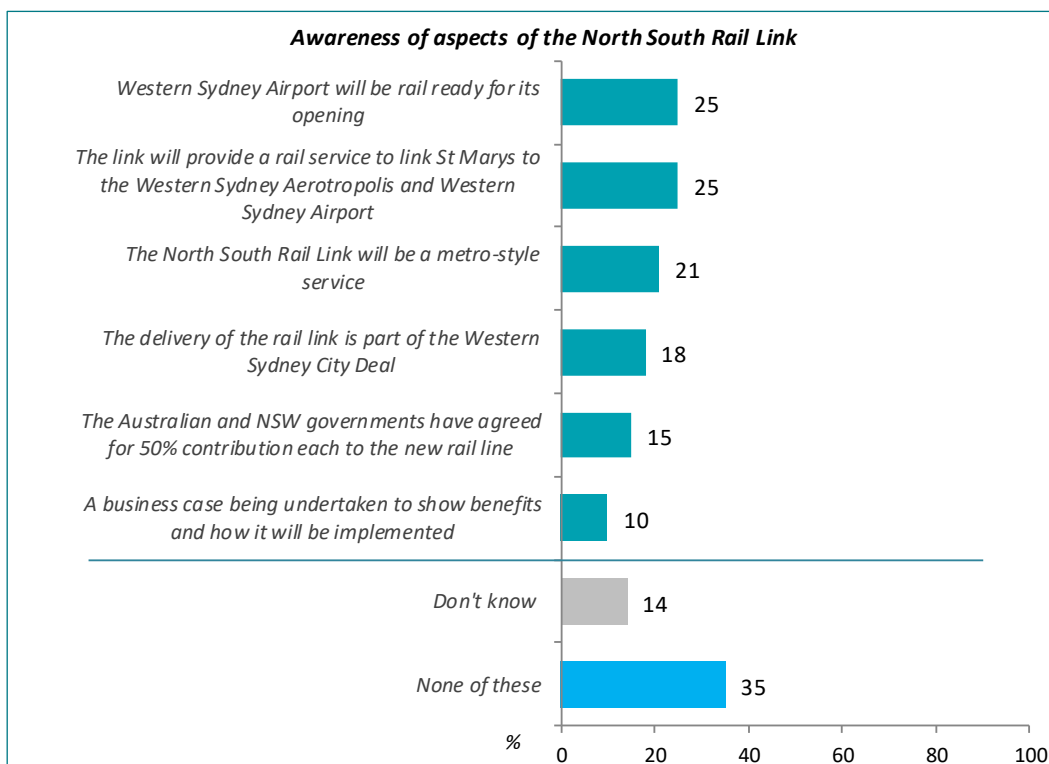
Awareness of initiatives and projects	TOTAL	South West	Inner West	North West	West Central
	%	%	%	%	%
Stage 1 of the North South Rail Link	30	32	24	29	32
Western Sydney Aerotropolis	13	21	11	10	13
Western Parkland City Liveability Program	11	16	7	12	10
Western City and Aerotropolis Authority	7	8	7	8	7
Some of other infrastructure project or initiative	4	2	3	5	6
Don't know/none	56	50	63	58	54
Sample size	1008	200	201	305	302

5.4.2. North South Rail Link

Residents were asked about awareness of six aspects of the North South Rail Link. Around half (52%) recognised at least one of the aspects (Figure 24). There was greater awareness for aspects related to operation of the service including being ready for the airport opening (25%) and the areas being linked (25%); and lower awareness around more administrative aspects including being joint funded by governments (15%) and undertaking of a business case (10%).

Awareness was on average lower among Inner West region residents, particularly for the service being ready for the airport opening (18%) and the areas being linked (16%) (Table 25).

Figure 24: Awareness of aspects of the North South Rail Link (Mar-Apr 19)



Q29. Which of the following aspects of the North South Rail Link have you personally heard about before today? Please select all that apply.

Base: All (n=1,008)

Table 25: Awareness of aspects of the North South Rail Link, by region (Mar-Apr 19)

Awareness	TOTAL	South West	Inner West	North West	West Central
	%	%	%	%	%
Western Sydney Airport will be rail ready for its opening	25	27	18	29	23
The link will provide a rail service to link St Marys to the Western Sydney Aerotropolis and Western Sydney Airport	25	28	16	30	22
The North South Rail Link will be a metro-style service	21	21	16	21	22
The delivery of the rail link is part of the Western Sydney City Deal	18	18	13	18	19
The Australian and NSW governments have agreed for 50% contribution each to the new rail line	15	17	12	15	14
A business case being undertaken to show benefits and how it will be implemented	10	9	8	10	13
Don't know/none of these	48	50	57	46	47
Sample size	1008	200	201	305	302

Q29. Which of the following aspects of the North South Rail Link have you personally heard about before today? Please select all that apply.

Base: All (n=1,008)

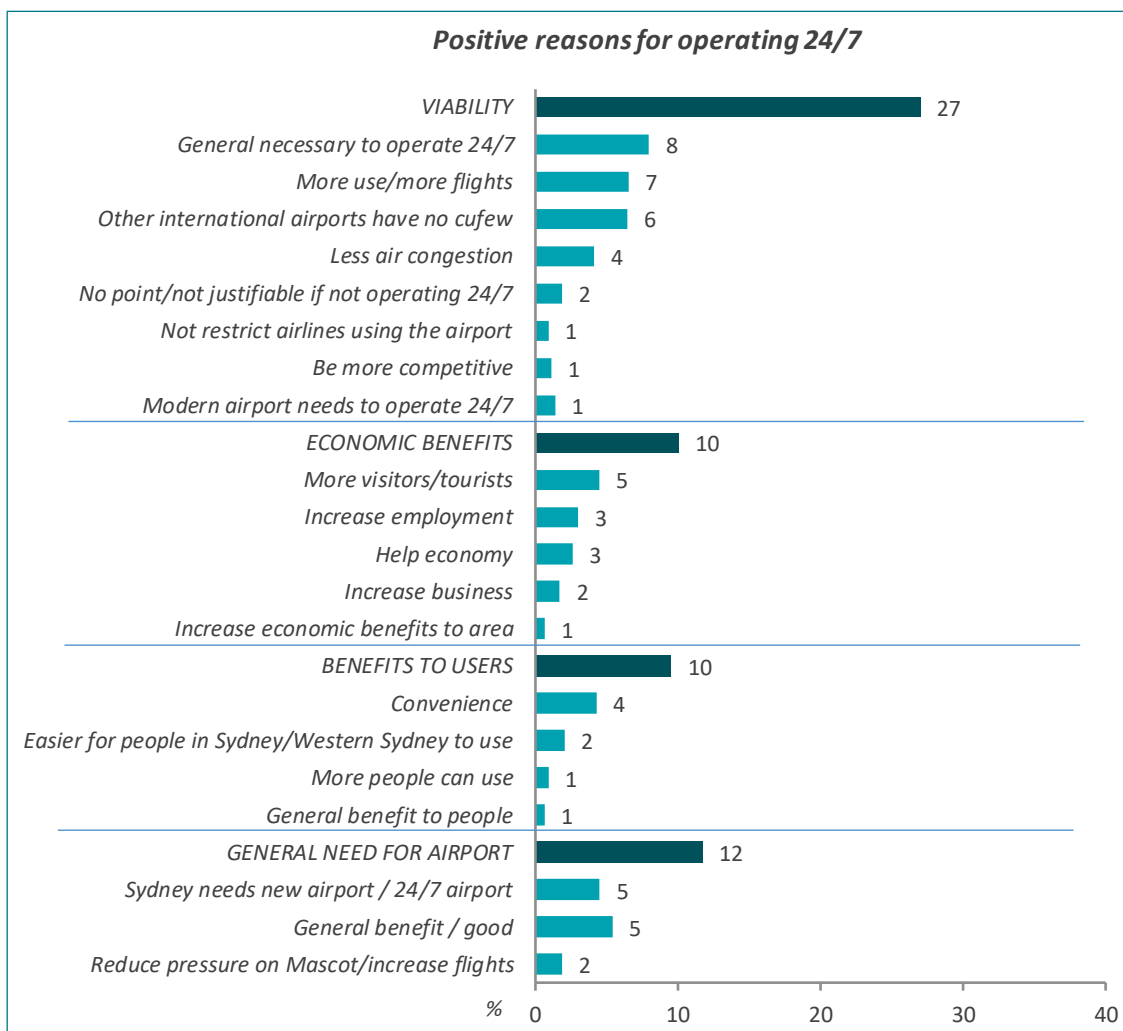
5.5. Reasons for Operating 24 Hours a Day, 7 Days a Week

Following on from the perception of importance of the new airport operating ‘24 hours a day, 7 days a week’ reported in Section 4.4, residents were also asked about reasons for their rating. The question was unprompted, and responses were spontaneous/open-ended and coded into themes. The reasons were constructed into themes under positive, negative and neutral streams for 24/7 operation:

- 49% gave a *positive* reason
- 41% gave a *negative* reason
- 11% gave a neutral response.

Key positive themes (Figure 25) were the viability of the airport (27%); and benefits (20%) including tourism and economic benefits to Sydney (10%), and benefits around ease and convenience to users (10%). A further theme was around the general need for an airport (12%). The overall incidences of the themes did not differ substantially between the regions.

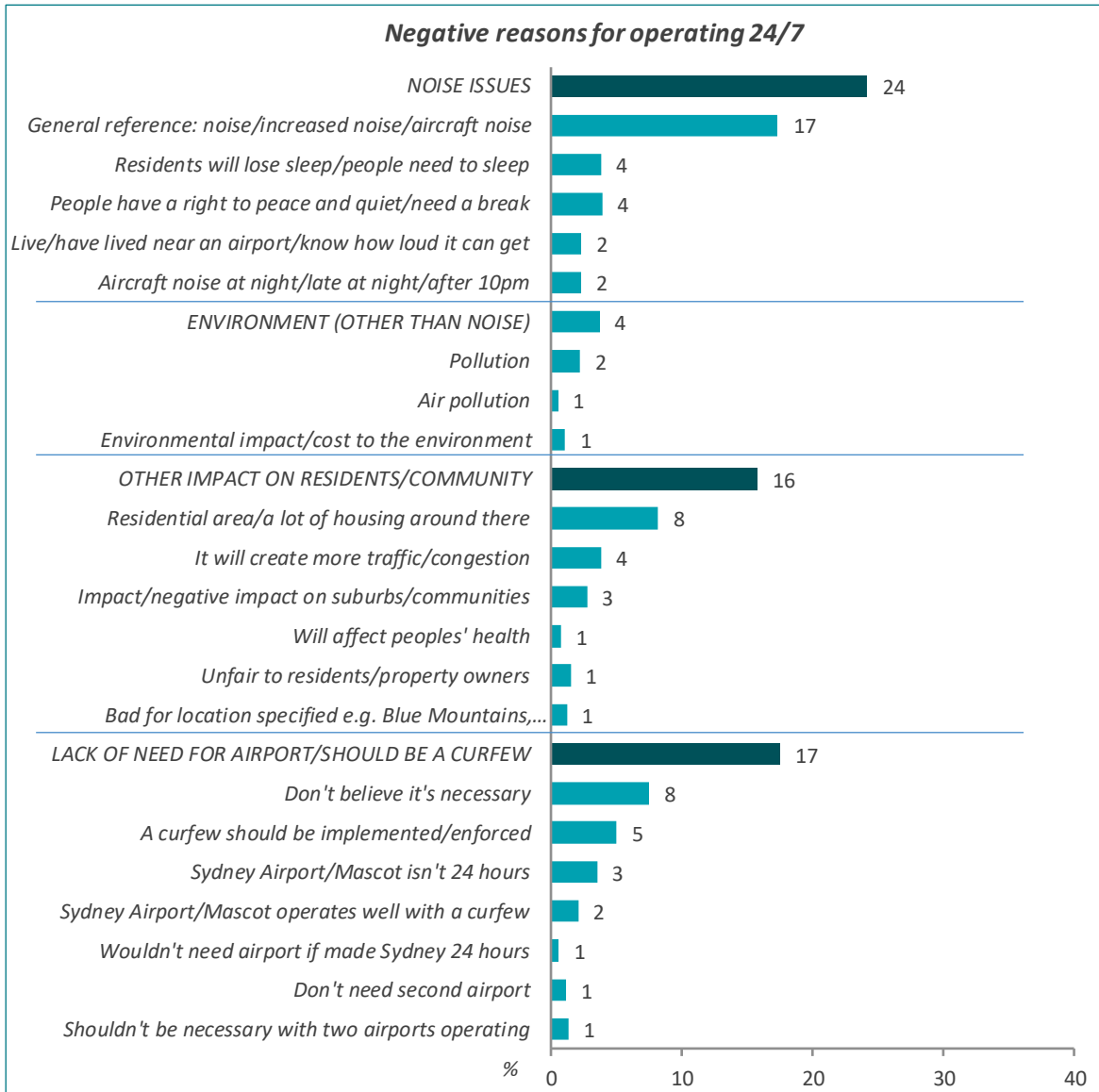
Figure 25: Reasons in support of operating 24/7 (Mar-Apr 19)



Q11. What are your reasons for giving that rating of the importance of Western Sydney Airport to operate 24 hours a day, 7 days a week? Please be as specific as possible (open response). [MULTIPLE CODES ALLOWED]
 First category in each section is a net of the sub-categories
 Base: All (n=1,008)

Key negative themes were around noise pollution (24%), other impacts on residents (16%) and lack of a need for an airport (17%) (Figure 26). The overall incidences of the themes did not differ substantially between the regions.

Figure 26: Reasons against operating 24/7 (Mar-Apr 19)



Q11. What are your reasons for giving that rating of the importance of Western Sydney Airport to operate 24 hours a day, 7 days a week? Please be as specific as possible (open response). [MULTIPLE CODES ALLOWED]

First category in each section is a net of the sub-categories

Base: All (n=1,008)

6. Conclusions and Suggested Improvements

6.1. Awareness of Western Sydney International Airport and sources of information

6.1.1. Level of knowledge

The large majority (90%) of residents were aware of the airport, although less than half (45%) consider they know at least 'quite a lot', which has not shown an increase since 2017. Overall, reported knowledge continues to be lower among female residents, residents aged under 55 years, and residents in Inner West region, highlighting segments where communications could be targeted. In contrast, the level of awareness was now marginally highest in South West region, where the airport is located, and in North West region.

Awareness of information continues to be strongest around the site being in Western Sydney, that the Australian Government is building the airport, and that roads will be improved to support the airport. Residents in South West Region, where the airport is located, were the most informed, particularly around commencement of construction (63%) and the airport being on track to open in 2026 (50%); while residents in both South West region (63%) and North West region (62%) were more likely to be aware of improvements to roads to support the airport. Residents in Inner West region were the least informed on these elements, and this is consistent with a pattern for Inner West residents to report less knowledge about the airport as well as giving less importance to being kept informed of progress.

There is scope to broaden resident knowledge progressively and, importantly, to maintain knowledge particularly as substantial initiatives and developments have started to occur.

6.1.2. Sources of information

The most successful channel for communication, most reported source for information, continues to be mainstream news media, being higher for older residents. Social contact—through 'word of mouth' or social media—was the next most reported type of source, and social media was equally high as mainstream news media for residents aged 18-34 years. Local sources were less reported, while being more nominated in South West region compared with the other regions.

6.1.3. Considerations

Developing or enhancing a positive information campaign based on driving increased knowledge of the airport, in particular the positive economic and social aspects and how potential negative impacts are being addressed, will be of benefit in order to heighten awareness overall. Many residents are currently less interested in being kept informed and will likely pay less attention, although this may possibly change once the project progresses further, which gives more importance to passive channels—in particular news sources—for providing information. Monitoring this awareness level and sentiment will assist with decisions on potentially expanding awareness and information campaigns.

When considering the above, campaigns using specific channels and optimised creative to increase awareness among people aged under 55 years may be warranted. Awareness of specific positive subjects can potentially also be optimised to a specific audience demographic and channel.

The mainstream news continues to be a broadly important source of information on the WSA project, and the primary source for those aged over 55 years, so maintaining a program of opportunities for the media is recommended for this channel. The social media/social channel remains attractive for residents under the age of 55 and allows specific micro-targeting; and is therefore an attractive option for improving knowledge of the airport among younger residents.

Suggestions:

Utilise mainstream news sources as a proven successful source of information to residents, maintaining a program of opportunities for the media.

The social media channel remains attractive for residents under the age of 55 and allows specific micro-targeting.

6.2. Key measures of community sentiment

6.2.1. Overall sentiment

Overall sentiment towards the airport continues to be positive for the majority of residents of Western Sydney. Over half of surveyed residents of Western Sydney expressed positive sentiment towards the airport on key measures of:

- *favourability* (64% agreeing)
- *positive benefits outweighing any negative impact* (60% agreeing)
- with less than one in ten holding a negative position on each.

Acceptance of the importance of *24/7 operations* was at less than half (45%) rating as important.

6.2.2. Favourability

As with previous waves, female residents and residents aged 18-34 years continue to have lower sentiment and there would be benefit for ensuring placement of communications to reach these groups. South West region also remains a target through providing information about progress of the airport and the initiatives in place in the area.

As with previous waves, key areas to communicate are benefits and improvement to the economy, jobs and infrastructure locally, as well as wider economic benefits in Sydney, as these resonate well with residents; and sentiment towards benefits is strongly related to overall favour towards the airport. Female residents in particular were more concerned than male residents about potential negative impacts, and there will be benefit in presenting information about how these issues are being addressed.

6.2.3. 24/7 operations

While agreement that *24/7 operations* are important has increased slightly, this remains an area requiring some continued work to communicate why this decision has been made for the airport. The viability of the airport, as well as economic benefits and support for the airport at Mascot were themes of support for operating *24/7*. Noise issues, as well as other negative impact on the area and a general lack of need were raised as reasons against. In addition, around half of residents took a less committed position on level of acceptance that planning restrictions around the airport to limit who will be affected.

It will be important to inform the community how noise issues are being managed, in particular the planning restrictions around the airport to limit who will be affected, as well as the importance of having a second major airport in Sydney to provide increased capacity.

Concentrating on local and wider economic benefits of a 24-hour airport— including employment, greater road and public transport improvements, and potential entertainment options—is important to improve understanding of 24-hour operations over time. Older residents and female residents are a key target for information as they were more negative towards 24/7 operation.

Suggestions:

- *Favourability*

Key areas to communicate are benefits and improvement to the economy, jobs and infrastructure locally, as well as wider economic benefits in Sydney

Specific channel selection and communication content should take into account audiences having lower sentiment: residents in South West region, female residents and those aged 18-34, with the last group potentially via social media microtargeting.

- *24/7 operation*

Promote understanding of how noise issues are being managed, in particular the planning restrictions around the airport to limit who will be affected.

Inform about the rationale for 24/7 operation, including the economic benefits to the area and Sydney, and the need to increase Sydney's aviation capacity to cope with future growth.

6.3. Perception of Key Projects and Initiatives

The Western Sydney City Deal provides significant projects and infrastructure to benefit to the area, With general awareness of the Western Sydney City Deal relatively low (30%), efforts to increase this awareness of the positive aspects (jobs, transport, skilling, housing etc.), will reduce gaps in knowledge of what is being developed, and will likely have subsequent effect on overall sentiment towards the airport. There will also likely be better awareness and understanding of the various elements of the Western Sydney City Deal as implementation progresses.

While the North South Rail Link is most noted, there is an opportunity to communicate details of the service, benefits for the region around economic development and wider economic benefits for Western Sydney. This consideration will also apply to the substantive projects were recognised by a small minority of residents: Western Sydney Aerotropolis (13%) and Western Parkland City Liveability Program (11%).

Suggestions:

Communicate details of what is being implemented through the Western Sydney Deal, including infrastructure, jobs, transport, other economic benefits, and social and liveability improvements.

Promote the commitment to the North South Rail Link, how it will operate and that it will be operational when the airport opens, as a key improvement to the area.

Facilitate effectiveness of communications by promoting relevant projects elements as key developments occur.

6.4. Perceived Barriers and Motivators

While the majority of residents in March-April 2019 continued to have a positive overall perception that benefits of the airport outweigh any negative impacts, there continued to be areas of concern to residents. This situation indicates an opportunity to provide more education and evidence about the benefits and information on how areas of concern are being addressed.

Western Sydney residents continue to have some concern that the airport will have a negative impact on the region, including living/working in the area. Key areas of concern continue to be associated with increase in traffic and noise, and other environmental impacts, both during and after construction, with around half of residents agreeing.

It remains important to address concerns over potential disruptions caused by construction works. This can be achieved by continuing to discuss the benefits of the airport, the transformation it will bring to the region and subsequent development and transport links. More detail on local issues, such as management of traffic around the airport site during operation and construction, will be needed to address negative sentiment at a more micro or individual level.

In contrast, key benefits continue to be economic gains for the area, including jobs and business/tourism, as well as improved roads and public transport. Perceptions of the benefits and improvements to the economy and infrastructure are more strongly related to being in favour of the airport than the environmental and community impacts. The improvement in favourability of the airport in March-April 2019 compared with 2018 was accompanied by an increase in positive views of benefits, including bringing jobs to the region supporting a growing population and economy, and improving roads/public transport. There were trends for greater positive perception of several benefits in South West region and West Central region.

Suggestions:

Promote benefits from the airport development and transport links, focusing on economic benefits for the region. As noted above, the approach could take into account audiences having lower sentiment or awareness: residents in South West region, female residents and those aged 18-34.

Build on the promotion of economic benefits to help address concerns over potential disruptions during construction and operation, including what steps are in place to manage the development.

Provide more detail around strategies used to address traffic and noise.

6.5. Informing the community: perceived importance and preferred channels

Demand for being kept informed about progress of the airport was high, with over half of Western Sydney residents rating being kept informed is important. Residents who considered it more important to be informed of progress were more likely to:

- report they knew more about the airport
- be in favour of the airport
- consider that the benefits would outweigh any negative impacts
- consider it important for the airport to operate 24/7
- agree with a range of benefits of the airport.

This pattern indicates a level of success of the communication strategy in providing information to those with greater interest.

Providing informative and engaging news stories via community engagement activities through to local media remains a strong method with which to promote awareness of and positive sentiment towards the airport. News sources provide a more passive type of exposure to residents (i.e. requiring less effort on the part of the resident to seek information).

Social media is an important supplementary channel particularly for younger residents.

The role of the websites remains well regarded, though there was low level of visitation. Consideration of raising awareness of westernsydneyairport.gov.au via search engine marketing (SEM) or through social media channels using content marketing or similar would be advisable.

Suggestions:

Utilise and improve on mainstream news sources, as the most successful channel for reaching residents, providing positive and engaging news stories via community engagement activities through to local media.

Promote the airport-related websites through search engine marketing (SEM) or through social media channels using content marketing.

Supplementary channels, including newsletters and information stands will provide additional exposure for residents demanding greater levels of information.

7. Appendix

7.1. 95% confidence intervals

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.⁶

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

Group sample size	Nominal 95% confidence interval
1200	±2.9%
1100	±3.0%
1000	±3.1%
900	±3.3%
800	±3.5%
700	±3.7%
600	±4.0%
500	±4.4%
400	±4.9%
300	±5.7%
200	±6.9%
150	±8.0%
100	±9.8%
50	±13.9%

7.2. Spontaneous responses about the airport

Open responses from residents about what they had heard about the airport were examined for specific elements and themes. A range of residents' spontaneous responses is included below:

NAMING: Mentions of Nancy-Bird Walton, female aviator or anything else about naming.

- Generic references:
 - Mentioning that it is *"Western Sydney Airport"*
- Some general references to having heard the name:
 - *"I know what it's called."*
 - hearing about *"...new airport name"*
 - *"From the news, said it's going to be at Badgerys Creek and what it's going to be called."*
 - *"New name for airport but can't remember name I think it is an indigenous name."*
- Named after aviator, including specific mention of Nancy-Bird Walton:
 - *"Will be at Badgerys Creek and named after Nancy Bird Walton"*
 - *"Badgerys Creek airport will be named Nancy Bird Walton Airport."*
 - *"The location, named after Nancy Bird, some people are very happy, there are concerns about being 24/7, it's being built."*
 - *"A railway extension going out to Badgerys. And the airport has been named after Nancy Bird Walton."*

⁶ Based on a standard calculation of the 95% confidence interval, using a z-score of 1.96

- *"Nancy-Bird Walton Airport."*
- *"That it's going to be named after a female Australian aviator."*
- *"...is going to be named after one of our female aviators..."*
- *"They have named the airport after a female aviator."*
- *"Started building, named after first Australian pilot."*

WSA Co: Awareness of Western Sydney Airport company and its establishment.

- No mention of company

RAIL LINE: Mentions of Sydney Metro as rail builder.

- No mention of organisation building the rail link.

AEROTROPOLIS: Mentions of St Marys, 'Aerotropolis' and the airport as stations/starts end points of the rail link.

- Aerotropolis
 - *"There will be a new Airport at Badgerys Creek with a CBD built around it, known as the Aerotropolis."*
 - *"That the urban area around it is called the Aerotropolis. That there is some opposition due to noise pollution, traffic and environmental impact."*
 - *"New international airport at Badgerys Creek. Aerotropolis."*
 - *A new airport is to be built at Badgerys Creek. Sydney Airport declined to undertake the construction since the government was offering no funding so now the federal government is building the airport themselves. There are currently arguments over whether a rail link is necessary at the opening of the airport or whether this will be delayed (like most government funded infrastructure) until after the airport has reached its full capacity. There are also arguments over whether the airport will have curfews like Sydney Airport or whether this is unnecessary since the people in western Sydney don't count. There have been proposals for an "Aerotropolis" to be developed in close proximity to the airport (sounds like an episode of "Utopia").*
 - *"That it will be at Badgerys creek. It will have an aerotropolis. They are trying to get rail and roads to the airport."*
 - *"I heard they are going to generate employment and new industrial areas. A metropolis."*
- St Marys/stations
 - *It's in Badgerys Creek. It due to open about 2026. It will be an international and domestic airport. A train line will link there from St Marys Station. Roads are being fixed to cater for the airport."*
 - *"Rail link to St Marys."*

NEED FOR RAIL LINK: Negative impact and mentions about congestion/public transport and that rail should be built.

- No linking of rail to traffic or transport issues.