








Research report prepared for the Civil Aviation Authority and the
Aviation Security Service

October 2014

PROJECT FEEL SAFE | 2014

Contents

		PAGES	
01.	Background, objectives and method	3-9	
02.	Key results and conclusions	11-17	
03.	NZ resident traveller result	18-41	
04.	International traveller results	42-54	
05.	Stakeholder survey results	55-82	

Background

The Civil Aviation Authority is the government agency responsible for oversight of New Zealand's civil aviation system. The Civil Aviation Authority was established as a Crown entity in 1992 under the Civil Aviation Act 1990, which defines its functions.

The safe and secure operation of New Zealand's civil aviation system is vital for a number of reasons. Civil aviation provides both social and economic benefits, including:

- connecting New Zealand with the rest of the world – there were approximately 60,993 international flights into and out of New Zealand in 2013
- connecting New Zealanders with each other – there were over 300,000 domestic flights within New Zealand in 2013; and
- enabling \$6.5 billion of exports to be flown from New Zealand airports in 2013.¹

The Authority comprises two operational arms: the CAA which regulates New Zealand's civil aviation system; and Avsec, the provider of security services within the New Zealand civil aviation system. The CAA and Avsec have commissioned research to measure the perceptions of users of the civil aviation system to ascertain:

- how safe people feel when flying;
- their impressions of the CAA and Avsec in terms of their effectiveness.

The findings of the research will be used to inform both management and governance decisions. Additionally, the CAA and Avsec will use the information to monitor their performance against targets set the 2014 – 2016 Statement of Intent.

The value of understanding perceptions of safety

‘Perception’ is a key indicator of how well the: (1) civil aviation system is performing; and (2) CAA and Avsec are performing. Perceptions of both are driven by the interactions individuals have either with the organisations or the civil aviation system as a whole, as well as coverage of issues or accidents in the media. For both organisations, perception can provide useful information to help inform decisions about the work that needs to be done to improve those perceptions.

‘Feel Safe’ is one way of summarising what both those using the civil aviation system, and those interacting with the CAA and Avsec, should perceive. Users should feel safe when stepping into an airport or on to an aircraft; and people or organisations interacting with the CAA and Avsec should feel confident that safety/security issues are being effectively managed and addressed as a consequence of that interaction.

All points of interaction, over time, build confidence that flying is safe — both in terms of the performance of the system and in the performance of the organisations (e.g. the CAA and Avsec) that work to maintain the safety and security of the civil aviation system.

The research presented here is designed to measure ‘Feel Safe’, and to produce key indicators that inform decisions about the work that needs to be done to maintain or increase perceptions of safety. Key performance indicators need to be targeted at three levels: (1) as a way of measuring progress towards the target levels of ‘Feel Safe’; (2) a governance level that enables the Board to make informed decisions; and (3) a management level that enables managers to make operational decisions.

Putting the survey results into context

Recent events covered by the New Zealand media that may have influenced 'perceptions of safety' in 2014 include:

An Air NZ flight bound for Auckland had to make an emergency landing shortly after departing from Melbourne Airport. No injuries were reported (January 2014)

Brian Hunter was convicted of impersonating a pilot and sentenced to 300 hours of community service. The Civil Aviation Authority said the conviction acted as a warning to all owners/operators that caution should be exercised before granting anyone access to their aircraft (January 2014)

A New Zealand-registered Boeing 737 freight plane crashed in the Solomon Islands. No injuries were reported but an investigation was launched into the cause of the crash (January 2014)

Asha Ali Abdille appeared before the parole board, who denied her request to be released. She was convicted of hijacking an Air NZ flight from Blenheim to Christchurch in 2008 and is currently serving a nine year sentence. The incident is the only in-flight hijacking of an aircraft in New Zealand aviation history (February 2014)

A Jetstar pilot won the right to meal and rest breaks in a decision by the Employment Relations Authority. The case outlined the shift patterns for Jetstar pilots, highlighting the lack of opportunities they have for meals and rest (February 2014)

Two people were injured in a light plane crash in North Canterbury (February 2014)

New regulations regarding high-powered hand-held laser pointers, which can be used temporarily blind pilots, came into effect. In 2013 there were 119 laser strikes on aircraft, compared to less than 10 in 2006 (March 2014)

Malaysia Airlines flight MH370 disappeared on route from Kuala Lumpur to Beijing. An intensive search was launched, but despite the efforts of the international teams involved no trace of the plane, carrying 239 people, could be found (March 2014)

Putting the survey results into context (continued)

Recent events covered by the New Zealand media that may have influenced 'perceptions of safety' in 2014 include:

An investigation by the Australian Transport Safety Bureau found that a Jetstar Airbus 320 flew below the minimum safe altitude for two minutes on a morning flight from Auckland to Queenstown in July 2012 but noted that a crash was highly unlikely (March 2014)

Search and rescue teams were unable to find a missing bi-plane believed to be missing off the north-eastern coast of the Coromandel. The self-built kitset plane took off from Ardmore Airport in Auckland but shortly after take-off the radar transponder stopped emitting a signal. The plane and its pilot have yet to be found (March 2014)

A coroner's report into the crash of a SkyDive NZ plane on the runway at Fox Glacier airport on September 4, 2010 said the events leading to the nine deaths were a mystery, and criticised the TAIC inquiry carried out in August 2012 into the cause of the crash. The coroner said the report by TAIC report was flawed as parts of the wreckage were buried in the days following the crash (May 2014)

An Air New Zealand flight from Auckland to Wellington was delayed by 35 minutes due to a person boarding the plane without holding the required boarding pass. The woman underwent standard aviation security screening procedures prior to boarding the aircraft. She was removed from the flight by aviation security staff and handed over to police (May 2014)

A microlight crash on the West Coast left one person with minor injuries and a second person escaped unharmed (June 2014)

An Air New Zealand flight from Auckland to Tonga was abandoned after a bird strike in the early stages of take-off, temporarily closing the runway (July 2014)

Air New Zealand customers are now permitted to use portable electronic devices in flight mode throughout flights on certain types of aircraft after satisfying the Civil Aviation Authority of the safety of these devices (July 2014)

Two pilots were stood down by Air New Zealand following an incident on a flight from Perth to Auckland. The captain had not responded to calls to open the cockpit door when the first officer attempted to return from a comfort break. Both pilots were required to undergo counselling and additional training (July 2014)

Putting the survey results into context (continued)

Recent events covered by the New Zealand media that may have influenced 'perceptions of safety' in 2014 include:

The Civil Aviation Authority launched an investigation into a helicopter crash in Marlborough which left two men injured (July 2014)

Air New Zealand took delivery of the first of 10 Boeing 787-9 Dreamliner aircraft. Air New Zealand is the first customer for the new, more fuel efficient, plane (July 2014)

Malaysia Airlines flight MH17 was shot down over eastern Ukraine, killing all 298 people on board. As the crash site is in disputed territory the recovery operation has been hampered, with delays in allowing international teams access to the site (July 2014)

A plane crashed in Taiwan while attempting to land during bad weather. Forty eight people were killed and ten survived the crash, which occurred on the Penghu Island chain (July 2014)

New Plymouth Airport was closed after a passenger plane stopped on the runway when it lost steering capability. The fault meant the plane could not be moved, and its position on the runway meant other aircraft were unable to take off or land (July 2014)

Transport Minister Gerry Brownlee offered to resign after skipping airport security screening when running late for a flight from Christchurch to Wellington. He and two of his staff entered the gate lounge through a door usually used for exits only. The Prime Minister refused to accept his resignation, but a Civil Aviation Authority investigation is underway. While the investigation takes place responsibility for the Civil Aviation Authority will sit with the Associate Minister for Transport, Michael Woodhouse (July 2014)

The inquest into the 2012 Carterton balloon tragedy resumed in the Coroner's Court after an adjournment in May (July 2014)

Passengers on an Air New Zealand flight who were stranded in Hawaii for three days while waiting for their plane to be repaired were offered \$1,000 each in compensation for the disruption (July 2014)

Research programme

01.

An online survey of air travellers who live in New Zealand



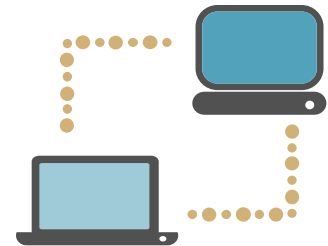
02.

An intercept survey of international air travellers at airports



03.

An online survey of key stakeholders



Research objectives

01.

The objectives of the two surveys of travellers are to provide information about how safe people feel using the civil aviation system, in order to:

- measure changes in perceptions over time*
- investigate how users' perceptions of safety vary by different types of aviation activity
- provide an understanding of the key things that influence or inform the user's perception of safety
- produce information about the age, gender and ethnicity of users of different types of aviation activity to allow for more detailed analysis of user-expectations.

USER SURVEYS

(resident travellers and international travellers)

02.

The objectives of the stakeholder survey were to provide information about how those who interact with the CAA and Avsec feel about safety performance, and to:

- measure changes in perceptions over time*
- understand what is driving stakeholder perceptions (e.g., quality and timeliness of advice, accessibility of information; ease of interaction; transparency of decision making; etc.)
- explore how stakeholder perceptions vary
- understand how stakeholders' perceptions vary by the different groups that represent them in interactions with the CAA and Avsec (e.g., monitoring and control agencies, policy agencies, other operational agencies, industry bodies, large operators, etc).

STAKEHOLDER SURVEY

Note, as detailed shortly only a small number of respondents completed the stakeholder survey. We have therefore not been able to address the last objective.

** Only statistically significant differences at the 95% confidence level are reported*

Research method

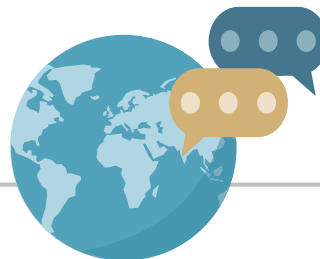
Research method of online survey of travellers who live in New Zealand

- Online survey of 1,229 New Zealanders aged 18 and over who have travelled by air in, or from, New Zealand within the last 12 months.
- Sample sourced from Colmar Brunton's Fly Buys online panel (more than 205,000 members).
- Average time to complete survey was approximately 8 minutes.
- 22% response rate was achieved.
- All interviews were completed during the period of 21 to 31 July 2014.
- Maximum margin of error for the total sample of 1,229 interviews is +/- 2.8% at the 95% confidence level.



Research method of intercept survey of international air travellers at airports

- Intercept survey of 327 international travellers at departure lounges at Auckland international airport (227 interviews) and Wellington international airport (100 interviews).
- Of the 327 international travellers surveyed, 168 had mainly lived in New Zealand in the last 12 months and 159 had mainly lived overseas in the last 12 months, with the most common countries being Australia, the USA, the UK and Canada.
- Average interview length was 5 minutes.
- 70% response rate was achieved.
- All interviews were completed from 21 to 24 July 2014.
- Maximum margin of error for the total sample of 327 interviews is +/- 5.4% at the 95% confidence level.



Research method of online survey of stakeholders

- Online survey of key stakeholders who interact with either or both CAA and Avsec.
- The CAA provided Colmar Brunton with a list of stakeholders to contact. Invitations to complete the survey were sent to 39 stakeholders covering 24 different organisations. Recipients of the email invitations were asked to forward the invitation to any other people in their organisations who they felt would also be interested in taking part in the survey.
- In total, 98 people completed the stakeholder survey.
- Average time to complete the survey was 11 minutes.
- All interviews were carried out between 21 July to 8 August 2014.
- Maximum margin of error for the total sample of 98 interviews is +/- 10.0% at the 95% confidence level.
- Please note that the sample this year contains a higher proportion of those outside of senior roles in aviation.²

Key results

75%



of **NZ resident travellers** felt extremely or very safe and secure on their most recent domestic or international flight
(No change since 2012)

92%



of **overseas visitors** feel extremely or very safe and secure on domestic or international flights departing from New Zealand
(No change since 2012)

40%



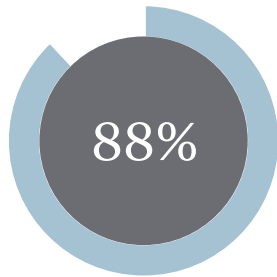
of 98 key **stakeholders** are satisfied with the safety and security performance of the civil aviation system in New Zealand
(Significantly lower than in 2012, decreasing from 61%)

NZ resident travellers are just as likely to report feeling extremely or very confident when flying to or from this country now as they were in 2012.

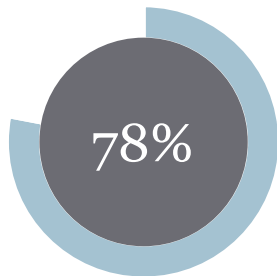
As in 2012, the overwhelming majority of overseas visitors feel extremely or very safe and secure when flying in or from New Zealand.

Stakeholders are less likely to rate their satisfaction with the safety and security performance of the New Zealand civil aviation system highly now than in 2012.

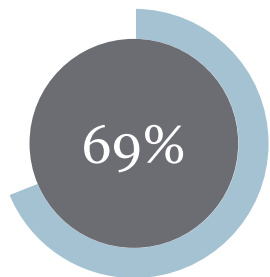
Key results (continued)



of people flying to overseas destinations from New Zealand feel safe
(No change since 2012)



of people flying on screened domestic routes feel safe
(No change since 2012)



of people flying on non-screened domestic routes feel safe
(No change since 2012)

Most of those flying internationally from New Zealand are confident in the safety and security of their flight.

Over three quarters of passengers flying on domestic flights where screening has taken place are confident in the safety and security of their flight.

While the majority of those flying on non-screened domestic flights are feel safe, they are less likely to feel this way than those on flights where screening has occurred.

Summary & Conclusions | NZ resident and international travellers

NZ resident and international travellers have high opinions of the safety and security of New Zealand aviation

Perceptions of safety and security in New Zealand aviation continue to be very positive among both NZ resident and international travellers. Results for both groups are generally consistent with those of 2012.

More than three quarters of NZ resident travellers and nine in ten international travellers believe aviation security in New Zealand is effective. Since 2012 there has been an increase in positive sentiment among international travellers. There has also been an increase in the view among international travellers that aviation security in New Zealand is world class (eight in ten feel this way). International travellers are more likely than NZ resident travellers to regard our aviation security as world class (just under six in ten NZ resident travellers agree).

Three quarters of NZ resident travellers felt 'extremely' or 'very' safe and secure on their most recent flight. Almost nine in ten international travellers feel either 'extremely' or 'very' safe and secure when flying within or from our country. Among international travellers there is greater confidence in the safety and security of New Zealand air travel among overseas visitors than New Zealanders travelling internationally, although confidence is high for both groups.

Pre-flight checks reassure travellers of the safety and security of their flight

Confidence in pre-flight checks is the main reason for NZ resident travellers feeling safe and secure on their most recent flight. For some passengers their experience of being stopped at an airport has given them a greater sense of safety and security as it shows 'the system works'.

Both NZ resident and international travellers are confident that the pre-flight checks performed will keep them safe and secure for the duration of their flight (eight in ten NZ resident travellers and nine in ten international travellers feel this way). Among the few NZ resident travellers who were dissatisfied with the ability of pre-flight checks to keep them safe an apparent absence of security screening was the main reason for their dissatisfaction. The safety and security checks travellers undergo before boarding an aircraft are clearly valued by travellers and work to reassure them that their flight is safe.

There is near universal agreement that pre-flight screening is necessary, and a strong call for all New Zealand flights to be screened

Almost all (97%) NZ resident travellers and 100% of international travellers say they understand why the pre-flight screening of themselves and their luggage is necessary. The large majority (seven in ten NZ resident travellers and over eight in ten international travellers) believe that all flights in New Zealand should be screened.

All safety and security procedures performed prior to boarding are seen as important

Most NZ resident and international travellers consider each of the safety procedures performed before boarding a flight to be 'extremely' or 'very' important, especially the screening of carry on luggage, the walk through metal detectors, and the scanning of boarding passes at the gate. The presence of aviation security officials is also seen as 'extremely' or 'very' important, particularly for international travellers. Questions about luggage at check in are seen as the least important security procedure, but the majority of NZ resident and international travellers do see this as an important part of the screening process. Again, international travellers are more likely to hold this view.

Summary & Conclusions | NZ resident and international travellers

Pre-flight checks impact on how safe and secure passengers feel when flying

Further underlining the importance of pre-flight security screening in making travellers 'feel safe' while flying is that NZ resident travellers on domestic flights without security screening feel less 'safe and secure' than those on domestic flights with security screening. International travellers feel more 'safe and secure' flying within or from this country than NZ resident travellers.

The reputation of the airline being flown and its safety record can also work to reassure passengers that their flight is safe

NZ resident travellers flying with all the international and domestic airlines reported on feel similarly high levels of safety and security, although Air New Zealand passengers are now less likely to rate their safety and security well when flying internationally but are more likely to feel safe and secure on domestic Air New Zealand flights.

Adventure/recreational aviation activities are undertaken by a third of NZ resident travellers and one in four international travellers

Overall, one in three NZ resident travellers have undertaken at least one of the five adventure/recreational aviation activities measured (e.g. sky diving, recreational flying, gliding, microlight flying, paragliding/hang-gliding). A quarter of international travellers have done so. Recreational flying is the activity most likely to be undertaken, followed by sky diving. Fewer than one in ten people from either group have undertaken the other activities.

There have been no changes in the proportion of international travellers undertaking adventure/recreational aviation activities, but more NZ resident travellers are taking part in sky diving and microlight flying (although microlight flights are still undertaken by a very small minority – just 5% have taken part in this activity in New Zealand).

Participants in adventure/recreational aviation activities are less likely to see these activities as risky

Those NZ resident travellers who have undertaken an adventure/recreational aviation activity are less likely to regard the activity as risky than non-participants. Sky diving and paragliding/hang gliding are seen as the riskiest activities overall, and around three quarters of participants associate these activities with some degree of risk. Microlight flying is seen as nearly as risky as sky diving or paragliding/hang-gliding by non-participants. Recreational flying is more likely to be seen as risky now than in 2012, with increases in the perception of risk for both participants and non-participants.

Summary & Conclusions | NZ resident and international travellers (3)

NZ resident travellers feel safe and secure when flying

The majority of NZ resident travellers feel safe and secure when flying (including any adventure/recreational aviation activities they undertake) but fewer report feeling safe and secure than say they felt 'extremely' or 'very' safe and secure on their most recent flight. This difference is likely to be because their most recent flight is likely to have been a domestic or international commercial flight.

There is a lack of knowledge about where to go to find out more about aviation security

Relative to other aspects of aviation security, NZ resident and international travellers' knowledge of where to go for further information about aviation security and the accessibility of information about aviation security is not well rated. Results are consistent with previous findings.

Less awareness of aviation accidents this year, in spite of the coverage of Malaysia Airlines

Despite a number of high-profile aviation incidents in 2014 NZ resident travellers are less aware of 'aviation accidents' than they were in 2012. This may be because the two Malaysia Airlines flights which attracted a great deal of media attention this year are possibly viewed as incidences of terrorism rather than 'aviation accidents'.

Summary & Conclusions | Stakeholders

Stakeholders hold a less positive view of the CAA and Avsec now than in 2012

There have been falls on a variety of measures including overall satisfaction with the performance of the civil aviation system. Satisfaction with the safety and security performance of the civil aviation system has fallen back to 2011 levels – just four in ten stakeholders are satisfied with the system’s performance.

Half of stakeholders believe aviation security in New Zealand is effective. A similar proportion feel Avsec delivers aviation security services at least ‘quite well’. Both these scores are lower than in 2012, although the falls aren’t significant.

Confidence in the ability of Avsec and the CAA to provide safety and security measures is declining, and there is less agreement that the organisation provides support to the industry

There is a downward trend in confidence that Avsec is able to effectively provide safety and security measures for the New Zealand aviation industry. Scores have gradually declined since 2011, however two thirds of stakeholders remain at least ‘quite confident’ in Avsec’s capabilities. Stakeholders hold less confidence in the ability of the CAA in this area – under half feel at least ‘quite confident’ that the CAA provides effective safety and security measures for the New Zealand aviation industry. This result is lower than in 2012, but not significantly so, and is consistent with the 2011 finding.

Stakeholders are less positive about the support the CAA and Avsec provides to the aviation industry now than in 2012, particularly for the provision of quality advice and the ease of interacting with the CAA and Avsec.

Decrease in confidence that the CAA provides good oversight of safety and security regulations

This year far fewer stakeholders think that the CAA oversees the implementation and adherence to industry safety and security regulations at least ‘quite well’. Four in ten feel this way, consistent with the views of stakeholders in 2011. There has been no change in views regarding the responsiveness of the CAA in applying regulations (half describe the CAA as being at least ‘quite responsive’) or how strictly the regulations are enforced across the industry (six in ten view the CAA as at least ‘quite strict’). More than half of stakeholders do not think the CAA applies regulations consistently across the industry.

Summary & Conclusions | Stakeholders (2)

The views of stakeholders present a range of opportunities to improve interaction with the industry

Working to increase their confidence that the CAA is in tune with the industry, willing to listen to concerns and apply regulations consistently would address some of the concerns raised by stakeholders in this research. There is also considerable resistance to the fees charged to general aviation. While it is unlikely that fee reduction is an option, explaining the need to charge fees may work to offset the resentment some stakeholders feel about this aspect of their contact with the civil aviation system. There is some feeling among stakeholders that Avsec is too concerned with the appearance of safety. Addressing concerns that some procedures are carried out unnecessarily could go some way to improving stakeholders' confidence in the organisation.

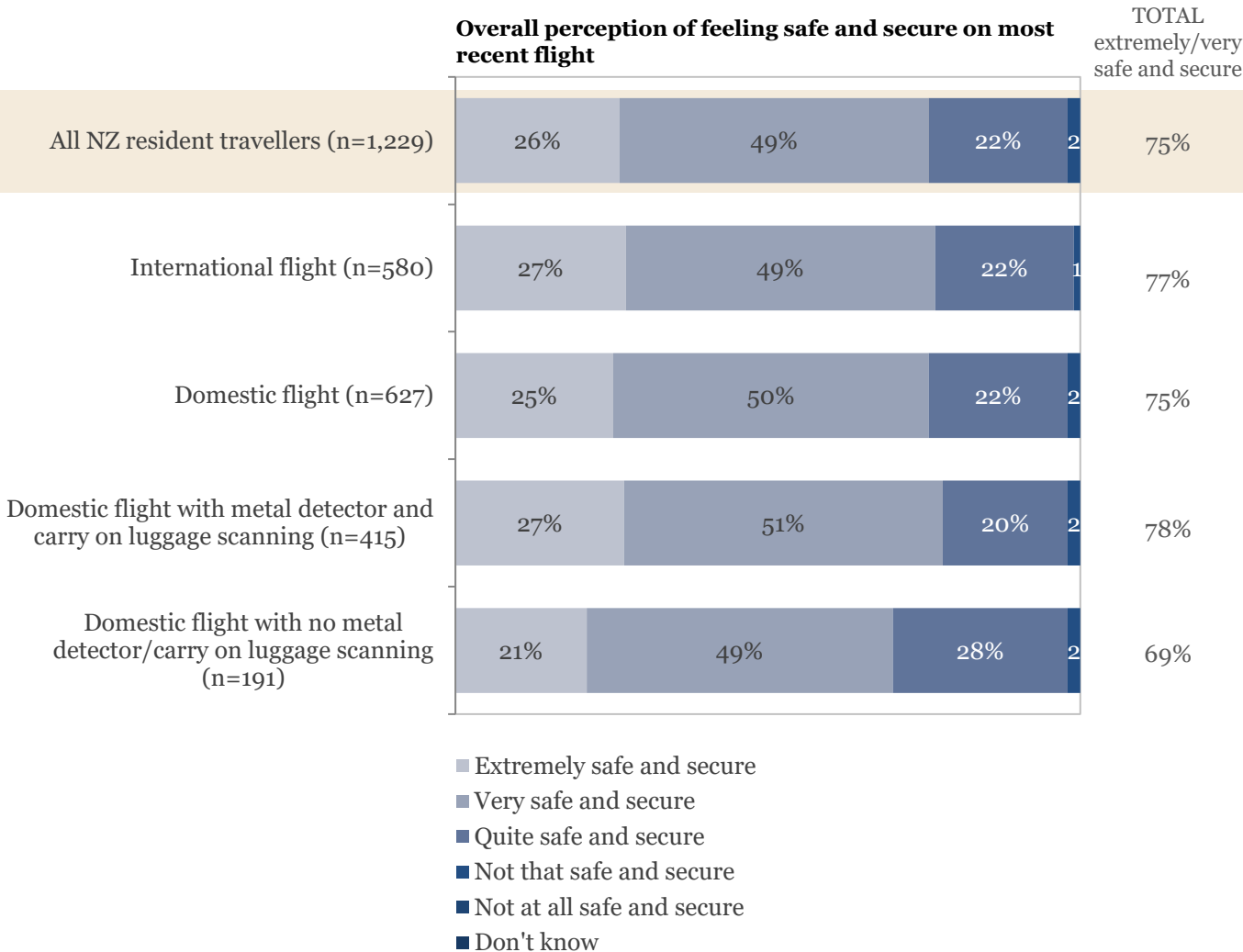
Finally, the reader should note that the number of respondents who took part in the stakeholder survey is relatively small (n=98) and that care should be taken when reviewing the findings for this audience. It is also worth noting that a wider variety of stakeholders participated in the research this year than previously, although similar patterns can be seen in results among those involved in key agencies/organisations and within the overall stakeholder population.



New Zealand Resident Traveller Survey results

Three in four New Zealanders felt safe and secure on their most recent flight

Q7. Overall how safe and secure did you feel on your most recent flight?



Domestic passengers who undergo a personal security check involving a metal detector and the scanning of carry-on luggage are more likely to feel 'extremely' or 'very' safe and secure than those who did not go through these types of checks.

Men are more confident in their safety and security when flying than women – they rate this higher for all flight types, significantly so at the overall level (78% cf. 72%); for domestic flights (78% cf. 71%); and domestic flights without metal detectors/carry on luggage scanning (76% cf. 60%).

Perceptions of safety and security are stable over time. While there are some signs of recovery in scores among passengers flying on domestic flights where screening has not taken place the changes are not significant.

Q Q7. Overall how safe and secure did you feel on your most recent flight?

Total extremely / very safe and secure

	2011	2012	2014
All NZ resident travellers	72%	75%	75%
International flight	75%	79%	77%
Domestic flight	71%	70%	75%
Domestic flight with metal detector/carry on luggage scanning	73%	75%	78%
Domestic flight with no metal detector/carry on luggage scanning	68%	60%	69%

Bases: All NZ resident travellers (2011 n=1,036; 2012 n=1,052; 2014 n=1,229), International flight (2011 n=433; 2012 n=464; 2014 n=580), Domestic flight (2011 n=589; 2012 n=568; 2014 n=627), Domestic flight with metal detector/carry on luggage scanning (2011 n=394; 2012 n=356; 2014 n=415), Domestic flight with no metal detector/carry on luggage scanning (2011 n=177; 2012 n=196; 2014 n=191)

The pre-flight security checks are the main reason NZ resident travellers felt 'safe and secure' during their most recent flight – in particular, personal experience of items being picked up during screening is reassuring for some passengers

“Passenger and hand baggage checks were very thorough.” | (Very safe and secure)

“I knew everyone had been through the same safety check as me, so everyone had gone through a metal detector and all luggage was scanned.” | (Very safe and secure)

“Seeing people including me pass through security checks makes me feel safe as I am sure when we cross that security area nobody brings a threat, which makes me feel comfortable during the whole flight.” | (Very safe and secure)

“The amount of checking the airline operators did before I even got to board the aircraft made it near enough to impossible to take anything aboard that could harm/hurt anyone.” | (Very safe and secure)

“Everyone's bags were scanned and people were checked. You could see the staff taking their job seriously and making sure that everything was ok. They asked people to stop and open bags which they double checked physically.” | (Extremely safe and secure)

“Check in and boarding was efficient and all involved appeared to be competent. The extra time taken in the overall scheme of things did tend to give you confidence.” | (Very safe and secure)

“Bags were checked at the security points and items of concern were questioned. The hairclips in my pocket that I forgot about were picked up by the scanner - I thought that if they can pick up hairclips they'll pick up anything.” | (Very safe and secure)

“I have two replacement knees and the security check checked them out as well. They didn't just take my word for it when the 'bells' went off.” | (Extremely safe and secure)

“The fact that going through the security checks it picked up my watch and other jewellery and they made me take them off and put them through the scanner and made me walk back through to make sure I was all clear.” | (Very safe and secure)

“My bag was checked and I had put in some rust killer. This was picked up at security and I was questioned about it. I had forgotten that I could not take things like this on the flight. Made me feel safe that this was picked up so other things like this would be picked up and keep me safe.” | (Very safe and secure)

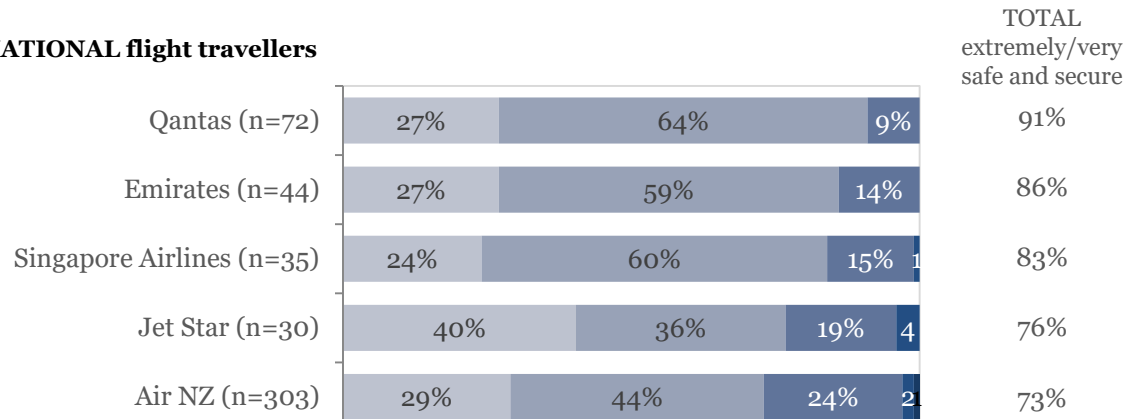
“My small sewing scissors were confiscated. If a small pair of scissors worry the security people and can't get through the screening then nothing will.” | (Extremely safe and secure)



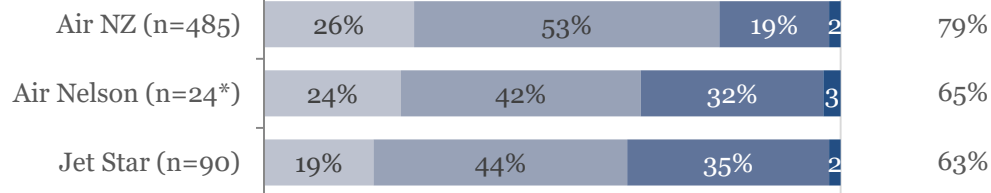
Overall perception of feeling safe and secure on most recent flight by airline

Q7. Overall how safe and secure did you feel on your most recent flight?

INTERNATIONAL flight travellers



DOMESTIC flight travellers



- Extremely safe and secure
- Very safe and secure
- Quite safe and secure
- Not that safe and secure
- Not at all safe and secure
- Don't know

Travellers feel safest on Qantas flights. Among international travellers, Qantas has a clear lead over Air New Zealand in perceptions of passenger safety and security. However, passengers rate Air New Zealand well above Jet Star for safety and security during domestic flights.

Base: International flight travellers – all who have flown internationally on each airline; Domestic flight travellers – all who have flown domestically on each airline, 2014

Results for Air New Zealand are conflicting – while domestic travellers are more likely to rate them well now than in 2012 there has been a decline in safety and security ratings for the airline among international travellers. International travellers flying with Qantas are more likely to rate them well for safety and security now than in 2012.

Q Q7. Overall how safe and secure did you feel on your most recent flight?

Total extremely / very safe and secure

	2011	2012	2014
INTERNATIONAL Travellers			
Qantas	73%	76%	91%▲
Emirates	73%	97%▲	86%
Singapore Airlines	70%	76%	83%
Jet Star	73%	68%	76%
Air NZ	77%	82%	73%▼
DOMESTIC Travellers			
Air NZ	72%	70%	79%▲
Air Nelson	56%	61%	65%
Jet Star	68%	73%	63%

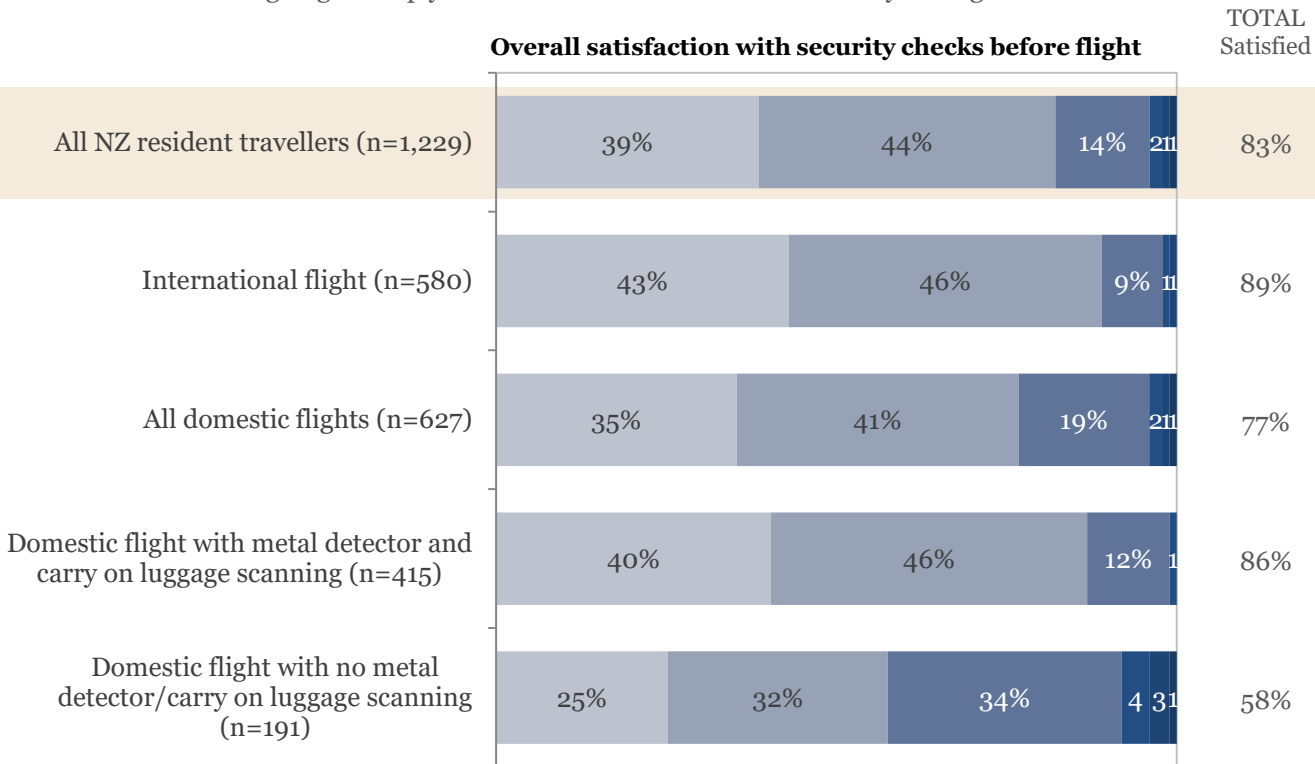
Bases: International flight travellers – Qantas (2011 n=42; 2012 n=47; 2014 n=72), Emirates (2011 n=30; 2012 n=28*; 2014 n=44), Singapore Airlines (2011 n=18*; 2012 n=22*; 2014 n=35), Jet Star (2011 n=28*; 2012 n=22*; 2014 n=30), Air New Zealand (2011 n=227; 2012 n=245; 2014 n=303)

Bases: Domestic flight travellers – Air New Zealand (2011 n=472; 2012 n=447; 2014 n=485), Air Nelson (2011 n=22*; 2012 n=29*; 2014 n=24*), Jet Star (2011 n=74; 2012 n=75; 2014 n=90)

* Caution: Low base number results are indicative only.

High level of satisfaction with security checks before flight – those who do not undergo pre-flight security checks are less likely to be satisfied

Q Q5. Thinking only of the security checks at the airport before boarding your flight, and not the airline that you flew, how satisfied were you that the security procedures you undertook were going to keep you safe and secure for the duration of your flight?



Satisfaction with pre-flight security checks is high. Among domestic travellers those who pass through a metal detector/undergo luggage scanning are more likely to say they felt the security procedures they undertook would keep them safe and secure during their flight.

NZ resident travellers on international flights are more satisfied with the checks than those travelling on a domestic flight. This difference reflects the lower level of satisfaction among non-screened domestic passengers.

Older travellers are more likely than average to be satisfied with the pre-flight security checks (90% of 65+ year olds compared to 83% of all NZ resident travellers).

NZ resident travellers who identify with an Asian ethnicity are less likely to say the security checks they underwent were reassuring when flying internationally (80%).

Satisfaction with pre-flight security checks remains consistent over time

Q5. Thinking only of the security checks at the airport before boarding your flight, and not the airline that you flew, how satisfied were you that the security procedures you undertook were going to keep you safe and secure for the duration of your flight?

Total satisfied

	2011	2012	2014
All NZ resident travellers	81%	81%	83%
International flight	90%	90%	89%
Domestic flight	75%	75%	77%
Domestic flight with metal detector/carry on luggage scanning	83%	85%	86%
Domestic flight with no metal detector/carry on luggage scanning	57%	57%	58%

Bases: All resident travellers (2011 n=1,036; 2012 n=1,052, 2014 n=1,229), International flight (2011 n=433; 2012 n=464, 2014 n=580), All domestic flights (2011 n=589; 2012 n=568; 2014 n=627), Domestic flight with metal detector and carry on luggage scanning (2011 n=394; 2012 n=356; 2014 n=415), Domestic flight with no metal detector/carry on luggage scanning (2011 n=174; 2012 n=196; 2014 n=191)

The security procedures before boarding their flight left very few NZ resident travellers feeling dissatisfied (either 'very' or 'quite'). As we've seen in previous years, conducting visible pre-flight safety checks on all domestic flights is the main way to improve satisfaction amongst those who are currently dissatisfied. There is also some sense that staff could be friendlier when dealing with the public.

"A passenger behind us had a Swiss army knife in his hand luggage which he found just before going through the last security check before boarding the plane - he kept it, the security staff did not pick up on this or remove it from him. Security should be a lot tighter and more thorough checks should be taken." | (Quite dissatisfied)

"As I was flying regionally (Wellington to Tauranga) there was no security checks of my carry on luggage. I don't know why this is the case although I assume it is associated with the size/range of the aircraft involved (but it doesn't make sense to me why some flights are treated differently)." | (Very dissatisfied)

"I travelled on a flight to Nelson. There were NO security checks. Why should a flight Auckland to Wellington have more importance security-wise than a flight to Nelson from Auckland!?" | (Very dissatisfied)

"Leaving from Timaru there are no security checks." | (Quite dissatisfied)

"No checks were done whatsoever - no questions were asked." | (Very dissatisfied)

"There didn't seem to be any security at all. It would be good if they had a bag scanner and body scanner for every flight." | (Very dissatisfied)

"There was only very minimal security. They could have had some security measures in place rather than nothing." | (Quite dissatisfied)

"There weren't any. Just boarded the flight with no checks at all of baggage." | (Quite dissatisfied)

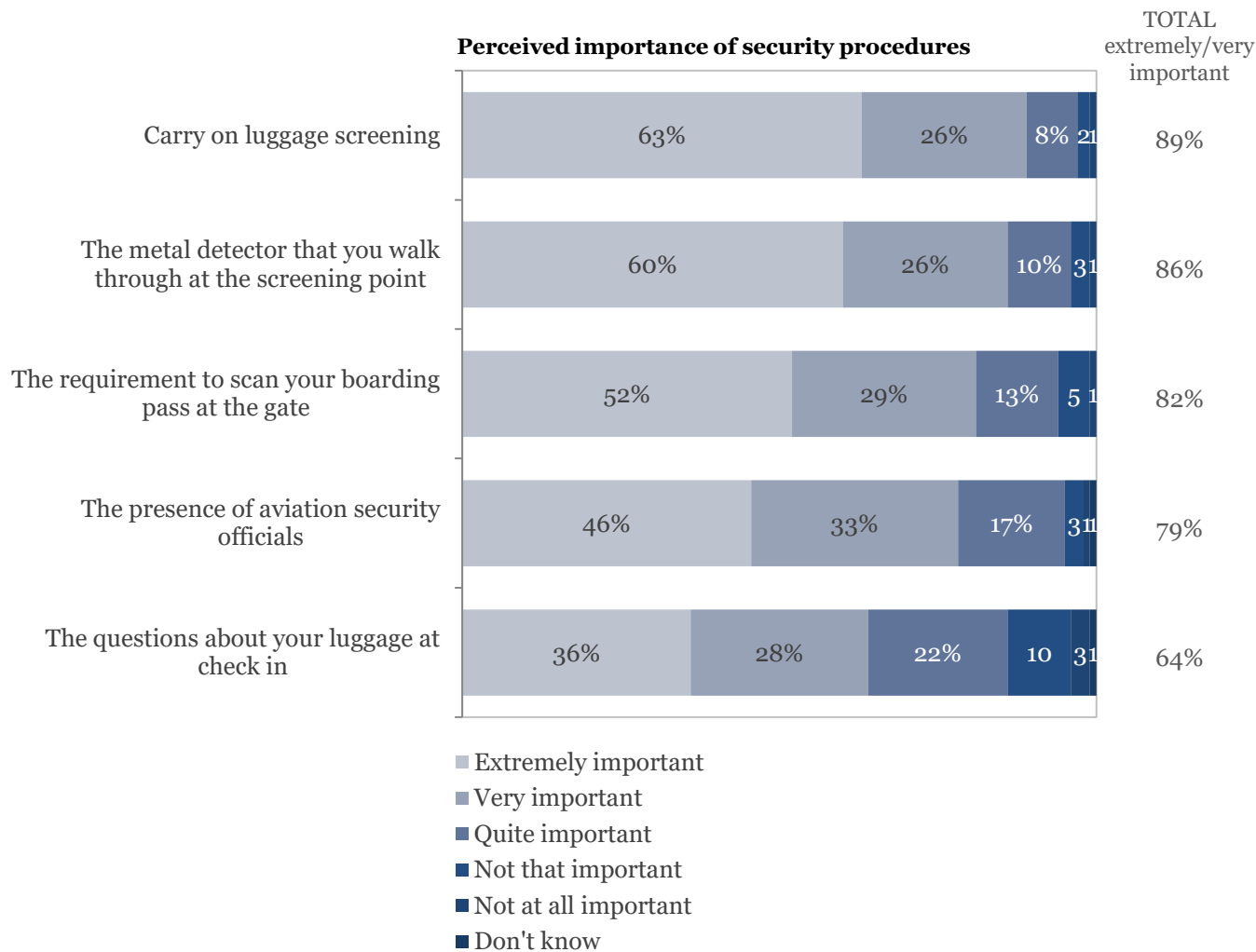
"Grumpy rather abrupt staff at Queenstown airport." | (Quite dissatisfied)

"The people manning the check points are not trained in dealing with the public and treat us all with suspicion." | (Very dissatisfied)



Screening of hand luggage and the use of metal detectors are seen as the most important security procedures – questions about luggage are regarded as the least important security procedure, although nearly two thirds of NZ resident travellers do see the questions as important

Q Q9a. Please indicate how important or unimportant you think each of these security procedures is in keeping people safe and secure when they fly.



Women are more likely than men to see each of the screening procedures as important.

Older travellers, aged 65 years or more, are more likely to think the questions about luggage at check-in are important (74%).

NZ resident travellers who identify as Asian are less likely to think it is important to scan boarding passes at the gate (73%). Almost all (95%) those identifying with a non-NZ European background see metal detectors as an important security procedure.

Less frequent travellers, who have flown 1 to 3 times in the past year, are more likely to view the luggage screening (92%), the use of metal detectors (90%) and the presence of aviation security officials (82%) as important.

Conversely, those who have flown 4 to 6 times in the past year are less likely to think luggage screening (84%), metal detectors (81%), scanning boarding passes at the gate (75%) and questions about luggage (56%) are important. Those who have flown 10 or more times are less likely to think luggage screening (80%), metal detectors (76%) or the presence of aviation officials (67%) are important.

No changes in the importance of security procedures compared to 2012

Q Q9a. Please indicate how important or unimportant you think each of these security procedures is in keeping people safe and secure when they fly.

Total extremely/very important

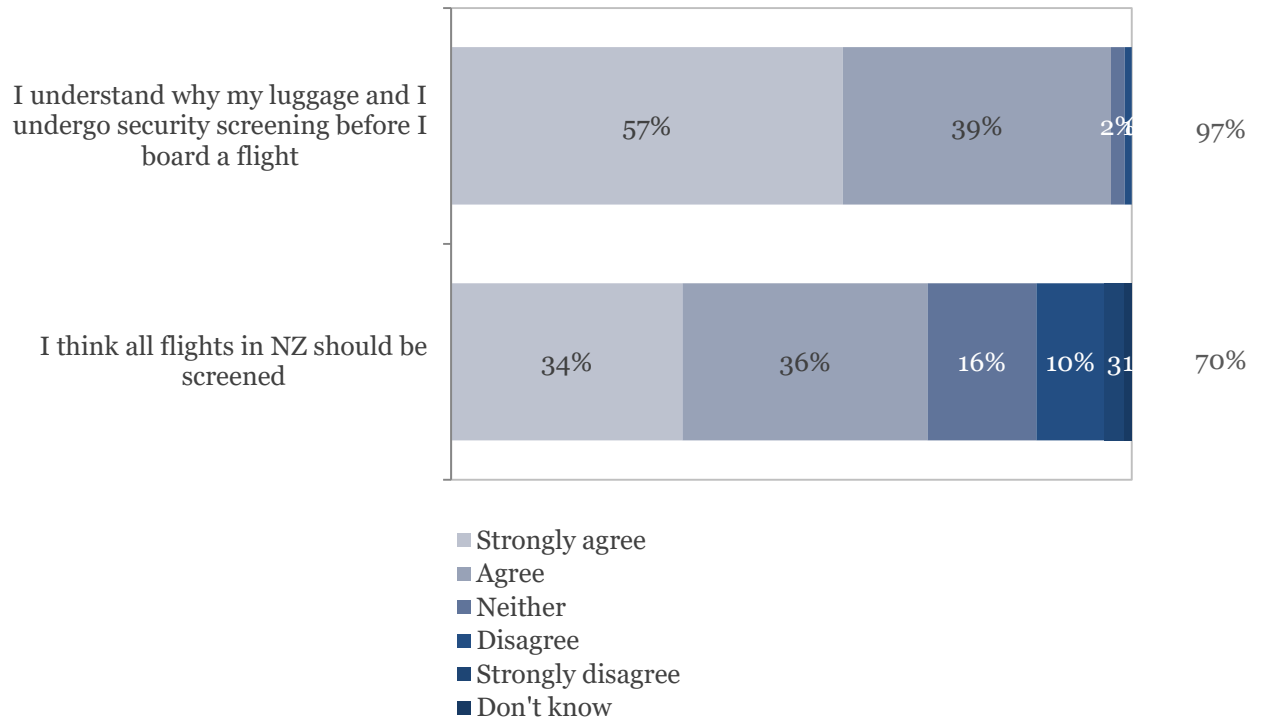
	2011	2012	2014
Carry on luggage screening	89%	89%	89%
The metal detector that you walk through at the screening point	86%	86%	86%
The requirement to scan your boarding pass at the gate	78%	80%	82%
The presence of aviation security officials	78%	78%	79%
The questions about your luggage at check in	62%	67% ▲	64%

Base: All NZ resident travellers (2011 n=1,036; 2012 n=1,052; 2014 n=1,229)

Almost all NZ resident travellers understand why security screening takes place. The majority feel all New Zealand flights should be screened.

Q Q9b. Please indicate how much you agree or disagree with each statement.

Perceived understanding of need for, and opinion about, security screening



Women are more likely than men to say they understand why they are subject to security checks before a flight (98% cf. 95%) and to feel that all flights in New Zealand should be screened (74% cf. 68%).

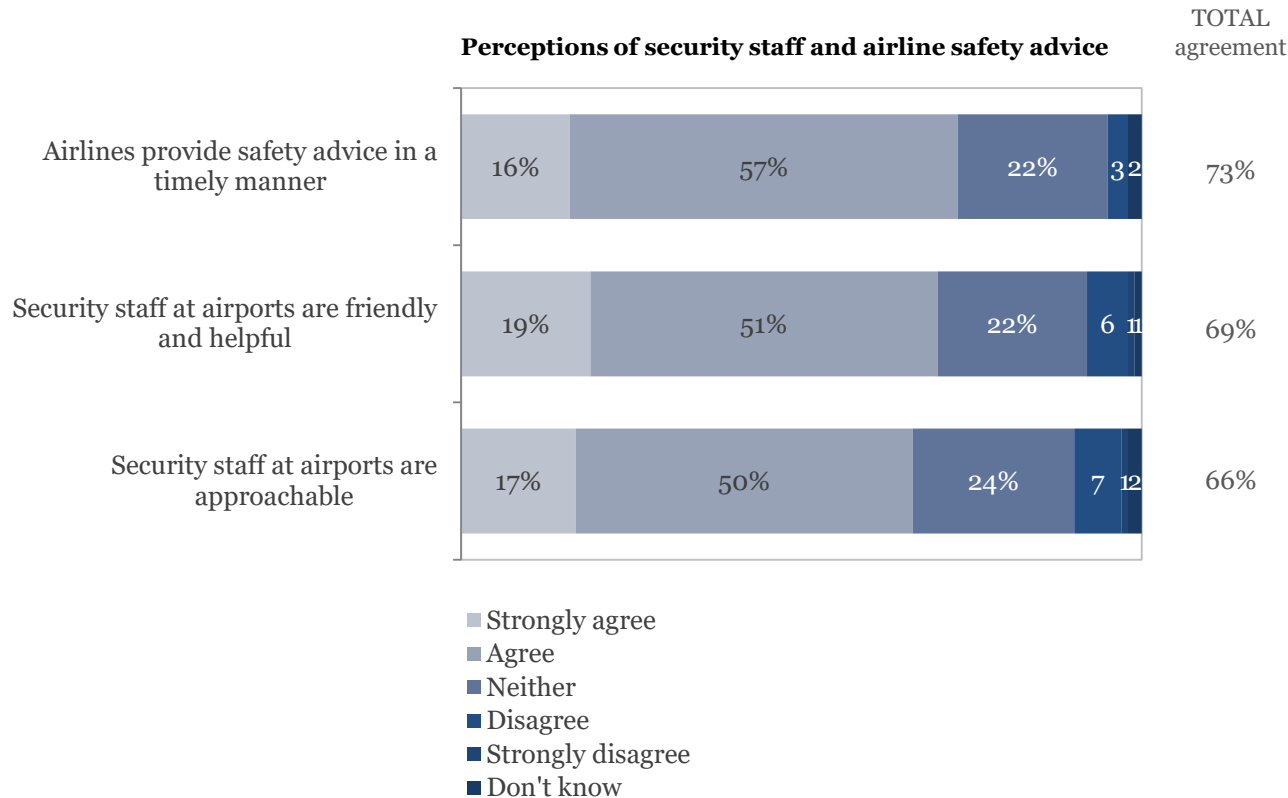
NZ resident travellers who identify with an Asian ethnicity are more likely to think that all New Zealand flights should be screened (85%).

Frequent flyers, those who have flown 10 or more times in the past year, are less likely to say they understand why they and their luggage have to undergo security screening prior to boarding a flight (91%). They are also less likely to think that all flights in New Zealand should be screened (58%).

Three quarters of NZ resident travellers think airlines provide safety advice in a timely manner. Security staff are seen as friendly and helpful, and as approachable, by most.

Q Q9b. Please indicate how much you agree or disagree with each statement.

Perceptions of security staff and airline safety advice



Although results are positive, the strength of feeling associated with these factors remains weak with few 'strongly' agreeing with the statements.

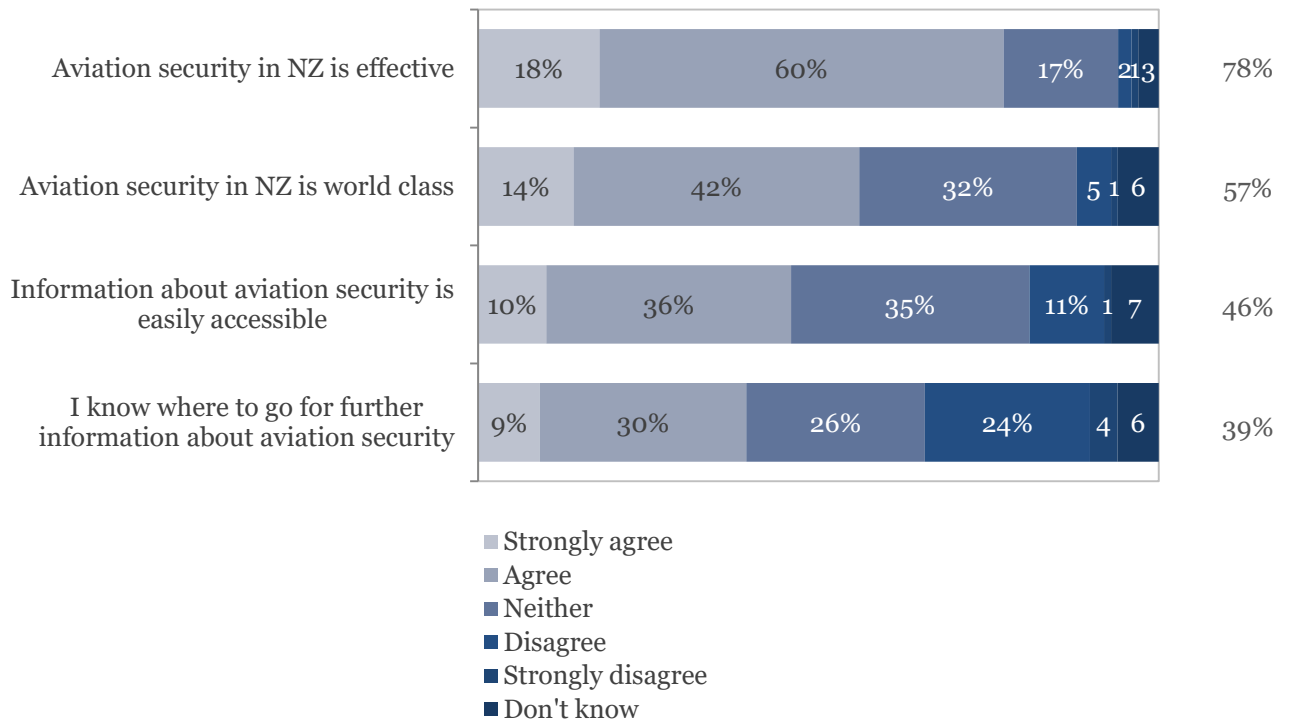
Younger travellers, aged 18 to 24 years, are more likely to think that airlines provide safety advice in a timely manner (80%). Older travellers, aged 65 years and above, are also more likely to feel this way (80%).

Those who have flown 10 or more times in the past year are less likely to say security staff at airports are friendly and helpful (56%).

Strong agreement that aviation security in New Zealand is effective, but only around half of NZ resident travellers think aviation security in this country is world class

Q Q9b. Please indicate how much you agree or disagree with each statement.

General perceptions of aviation security in New Zealand



Men are more likely than women to say they know where to go for further information about aviation security (44% cf. 33%).

Those aged 25 to 34 years are less likely than average to say aviation security in New Zealand is world class (47%). People aged 65 years and over are more likely to say that aviation security in New Zealand is world class (75%), that information about aviation security is easily accessible (55%) and that they know where to go for further information about aviation security (47%).

NZ resident travellers who identify with an Asian ethnicity are more likely to say that information about aviation security is easily accessible and that they know where to go for further information (58% and 57% respectively).

Frequent flyers, those who have flown 10 or more times in the past year, are more likely to say that they know where to go for further information about aviation security (52%). They are less likely to think that aviation security in New Zealand is world class (39%).

All scores are consistent with those of 2012

Q Q9b. Please indicate how much you agree or disagree with each statement.

Total agreement

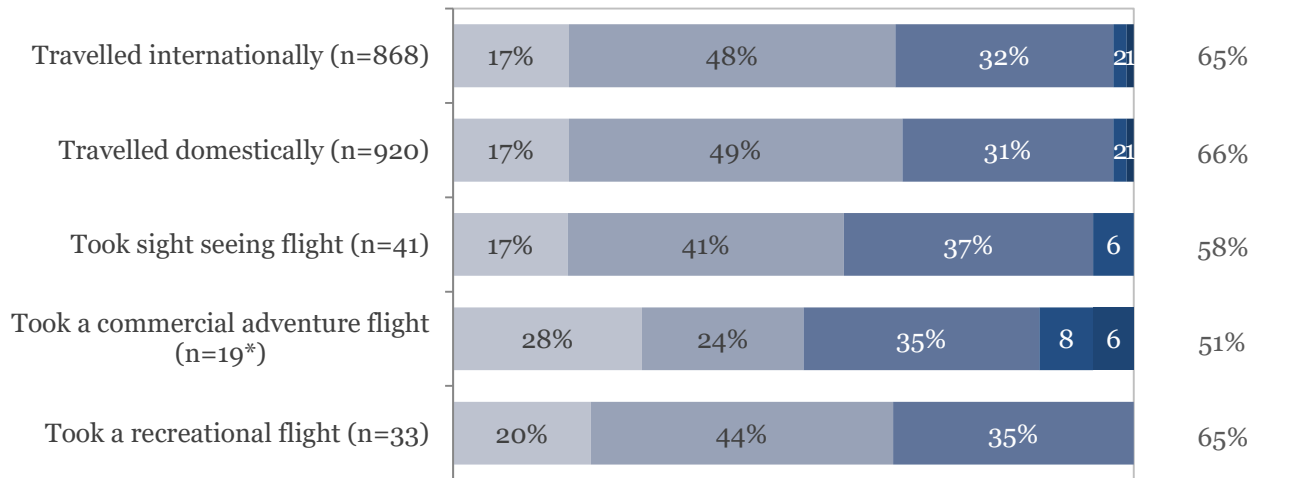
	2011	2012	2014
I understand why my luggage and I undergo security screening before I board a flight	96%	98% ▲	97%
I think all flights in NZ should be screened	71%	73%	70%
Airlines provide safety advice in a timely manner	70%	71%	73%
Security staff at airports are friendly and helpful	72%	72%	69%
Security staff at airports are approachable	66%	65%	66%
Aviation security in New Zealand is effective	77%	76%	78%
Aviation security in New Zealand is world class	52%	53%	57%
Information about aviation security is easily accessible	44%	42%	46%
I know where to go for further information about aviation security	33%	37% ▲	39%

Base: All NZ resident travellers (2011 n=1,036; 2012 n=1,052; 2014 n=1,229)

Overall perceptions of feeling safe and secure are highest when travelling on a domestic or international flight

Q Q12. Thinking about all aspects of aviation safety and security in New Zealand, overall how safe and secure do you feel when you fly (or undertake one of the activities in the last question)?

Overall perceptions of feeling safe and secure based on all aspects of aviation and security in New Zealand



- Extremely safe and secure
- Very safe and secure
- Quite safe and secure
- Not that safe and secure
- Not at all safe and secure
- Don't know

When all aspects of aviation safety and security in New Zealand are considered, two thirds of NZ resident travellers who have travelled domestically (66%) or internationally (65%) feel either 'extremely' or 'very' safe when flying – please note that at this question 'flying' includes all forms of aviation they undertake e.g. on a commercial airline, sky diving, recreational flying, gliding, microlight flying or paragliding/hang gliding.

Results at this question are significantly lower than the comparable result relating to how safe and secure people felt on their most recent flight. This is likely to be because this question includes a consideration of all forms of flying respondents undertake (which could include parachuting, flying in a microlight etc) rather than just the most recent flight which is most often domestic or international travel on a commercial airline.

Results among those who have taken a sight seeing flight are a little lower than for commercial air travel, but the result is not statistically significant.

Few people have undertaken an adventure or recreational flight, so while it may appear that those who take part in adventure flights are less likely to feel safe when flying this result is indicative only.

* Caution: Low base number results are indicative only.

Results are consistent compared to 2012

Q Q12. Thinking about all aspects of aviation safety and security in New Zealand, overall how safe and secure do you feel when you fly (or undertake one of the activities in the last question)?

Total extremely/very safe and secure

	2011	2012	2014
Travelled internationally	67%	68%	65%
Travelled domestically	67%	65%	66%
Took a sight-seeing flight	74%	69%	58%
Took a recreational flight	53%	48%	65%

Bases: All resident travellers who have travelled internationally (2011 n=704; 2012 n=710, 2014 n=868), domestically (2011 n=833; 2012 n=765; 2014 n=920), taken a sight seeing flight (2011 n=24*; 2012 n=39; 2014 n=41)

* Caution: Low base number results are indicative only. Results for commercial adventure flights are not shown due to very low base sizes in previous years.

Perceptions of adventure/recreational aviation activities overall



KEY RESULTS

- Overall, 32% of NZ resident travellers have undertaken at least one of the adventure/recreational aviation activities surveyed (i.e. sky diving, recreational flying, gliding, flying in a microlight or paragliding/hang gliding).
- 89% of those who take part in adventure/recreational aviation activities think at least one of the activities they undertake is risky. Those who have never taken part in these activities are more likely to say at least one of them is risky (95%).
- Almost 6 in 10 (58%) of those who have taken part in adventure/recreational aviation activities feel 'extremely' or 'very' safe and secure when flying or undertaking aviation activities in New Zealand.
- No changes in results since 2012.

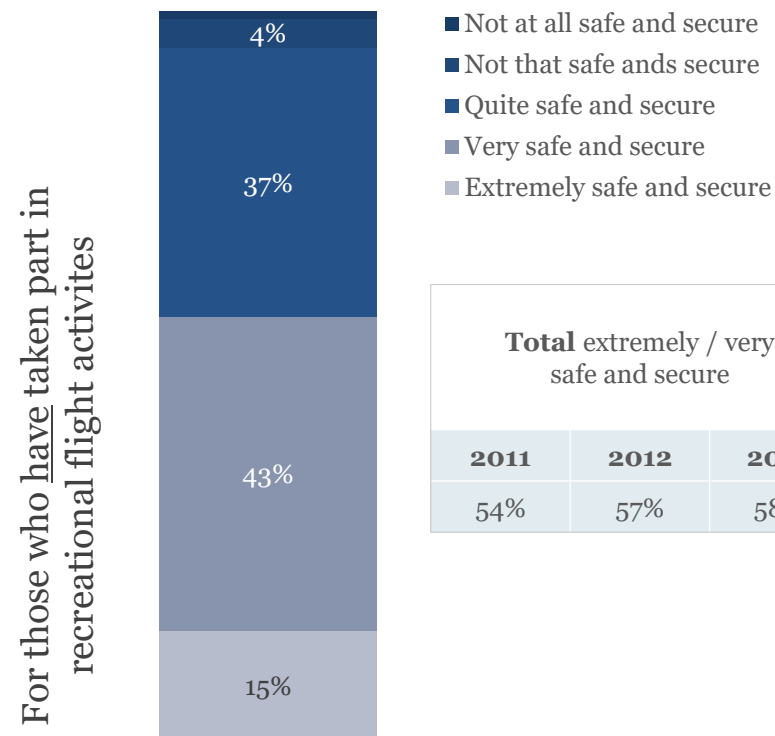
Q Q13. Please indicate how risky you think each of these activities is to the personal safety of the people that undertake them

PERCEIVED RISK OF ADVENTURE/RECREATIONAL AVIATION ACTIVITIES	Have not taken part (n=822)			Have taken part (n=385)		
	2011	2012	2014	2011	2012	2014
Extremely / very risky		67%		60%		
Quite risky		28%		29%		
Not that / not at all risky		5%		11%		
Total extremely / very / quite risky	95%	96%	95%	92%	88%	89%

Bases: Resident travellers who have not taken part in recreational flight activities (2011 n=737; 2012 n=719; 2014 n=822), Resident travellers who have taken part in recreational flight activities (2011 n=287; 2012 n=311; 2014 n=385). Don't know responses excluded

Q Q12. Thinking about all aspects of aviation safety and security in New Zealand, overall how safe and secure do you feel when you fly or undertake one of the activities mentioned in the last question?

How safe and secure adventure/recreational flyers feel when flying or undertaking aviation activities in New Zealand



Total extremely / very safe and secure

2011	2012	2014
54%	57%	58%

Perceptions of sky diving



KEY RESULTS

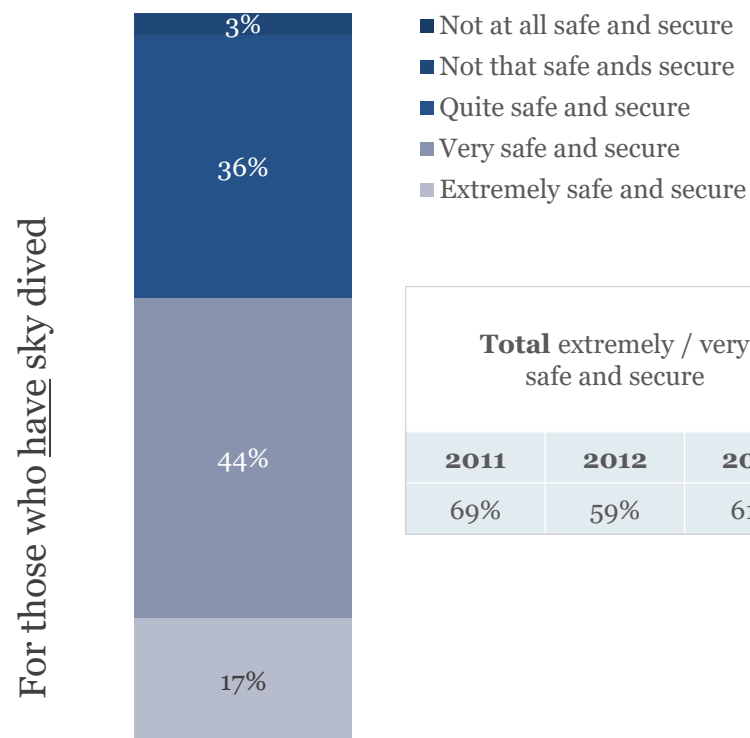
- 13% of NZ resident travellers have been sky diving in New Zealand, significantly more than in 2012 (10%).
- Three quarters (73%) of sky divers think the activity carries some degree of risk. People who have never been sky diving in New Zealand consider it to be more risky than skydivers (88%).
- 6 in 10 of those who have been sky diving feel 'extremely' or 'very' safe and secure when flying or undertaking aviation activities in New Zealand (61%).
- No changes in results since 2012.

Q13. Please indicate how risky you think each of these activities is to the personal safety of the people that undertake them

PERCEIVED RISK OF SKY DIVING	<u>Have not sky dived</u> (n=1,066)			<u>Have sky dived</u> (n=137)		
	2011	2012	2014	2011	2012	2014
Extremely / very risky		50%		34%		
Quite risky		37%		39%		
Not that / not at all risky		12%		27%		
Total extremely / very / quite risky	87%	86%	88%	75%	64%	73%

Q12. Thinking about all aspects of aviation safety and security in New Zealand, overall how safe and secure do you feel when you fly or undertake one of the activities mentioned in the last question?

How safe and secure sky divers feel when flying or undertaking aviation activities in New Zealand



Total extremely / very safe and secure

2011	2012	2014
69%	59%	61%

Bases: Resident travellers who have not sky dived (2011 n=924; 2012 n=936; 2014 n=1,066), Resident travellers who have sky dived (2011 n=94; 2012 n=90; 2014 n=137). Don't know responses excluded

Perceptions of recreational flying



KEY RESULTS

- 18% of NZ resident travellers have undertaken recreational flying in New Zealand.
- 4 in 10 (41%) of those who have been recreational flying associate the activity with some level of risk, a higher proportion than in 2012. Those who have never been recreational flying in New Zealand are also more likely to consider the activity risky now than previously, and are more likely than recreational flyers to view it as a risk (64%).
- Around 6 in 10 (59%) of those who have flown recreationally in New Zealand feel 'extremely' or 'very' safe and secure about flying and undertaking aviation activities in New Zealand (59%).

Q13. Please indicate how risky you think each of these activities is to the personal safety of the people that undertake them

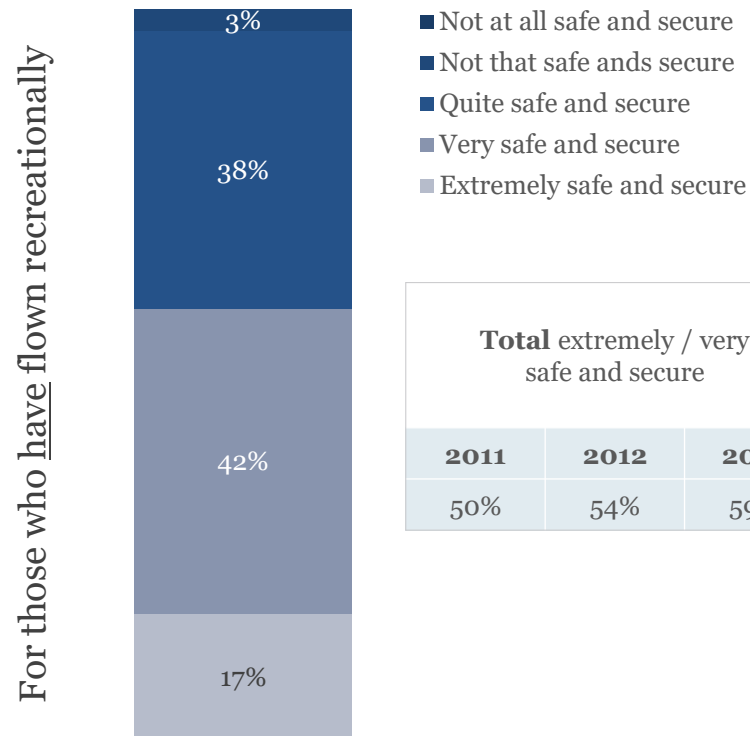
PERCEIVED RISK OF RECREATIONAL FLYING	<u>Have not flown recreationally</u> (n=960)			<u>Have flown recreationally</u> (n=220)		
	2011	2012	2014	2011	2012	2014
Extremely / very risky		25%		12%		
Quite risky		39%		29%		
Not that / not at all risky		36%		59%		
Total extremely / very / quite risky	2011	2012	2014	2011	2012	2014
	59%	58%	64%▲	34%	31%	41%▲

Bases: Resident travellers who have not flown recreationally (2011 n=837; 2012 n=836; 2014 n=960), Resident travellers who have flown recreationally (2011 n=173; 2012 n=179; 2014 n=220). Don't know responses excluded

▲ ▼ Significantly higher/lower than previous wave of research

Q12. Thinking about all aspects of aviation safety and security in New Zealand, overall how safe and secure do you feel when you fly or undertake one of the activities mentioned in the last question?

How safe and secure recreational flyers feel when flying or undertaking aviation activities in New Zealand



Total extremely / very safe and secure

2011	2012	2014
50%	54%	59%

Perceptions of gliding



KEY RESULTS

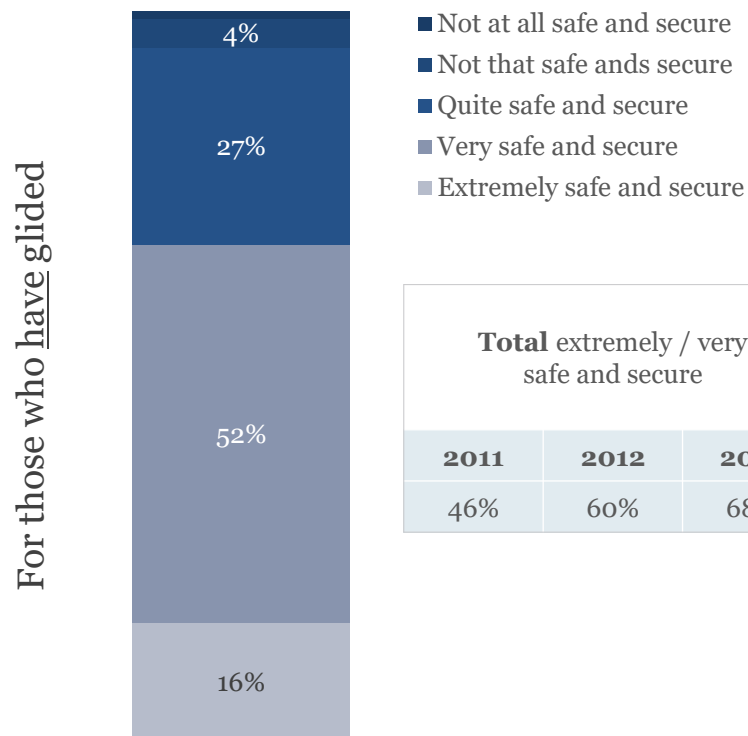
- 9% of NZ resident travellers have been gliding in New Zealand.
- Nearly half (46%) of those who have been gliding associate the activity with some level of risk. People who have not taken part in gliding in New Zealand consider it to be more risky than those who have (70%).
- Over two thirds (68%) of those who have been gliding in New Zealand feel 'extremely' or 'very' safe and secure about flying and undertaking aviation activities in New Zealand.
- No significant changes since 2011, though there is an upward trend in people who have been gliding considering it a risky activity.

Q Q13. Please indicate how risky you think each of these activities is to the personal safety of the people that undertake them

PERCEIVED RISK OF GLIDING	<u>Have not glided</u> (n=1,082)			<u>Have glided</u> (n=102)		
	2011	2012	2014	2011	2012	2014
Extremely / very risky		31%		21%		
Quite risky		40%		25%		
Not that / not at all risky		30%		54%		
Total extremely / very / quite risky	71%	69%	70%	30%	36%	46%

Q Q12. Thinking about all aspects of aviation safety and security in New Zealand, overall how safe and secure do you feel when you fly or undertake one of the activities mentioned in the last question?

How safe and secure people who have been gliding feel when flying or undertaking aviation activities in New Zealand



Bases: Resident travellers who have not glided (2011 n=939; 2012 n=927; 2014 n=1,082), Resident travellers who have glided (2011 n=71; 2012 n=88; 2014 n=102). Don't know responses are excluded

Perceptions of flying in a microlight



KEY RESULTS

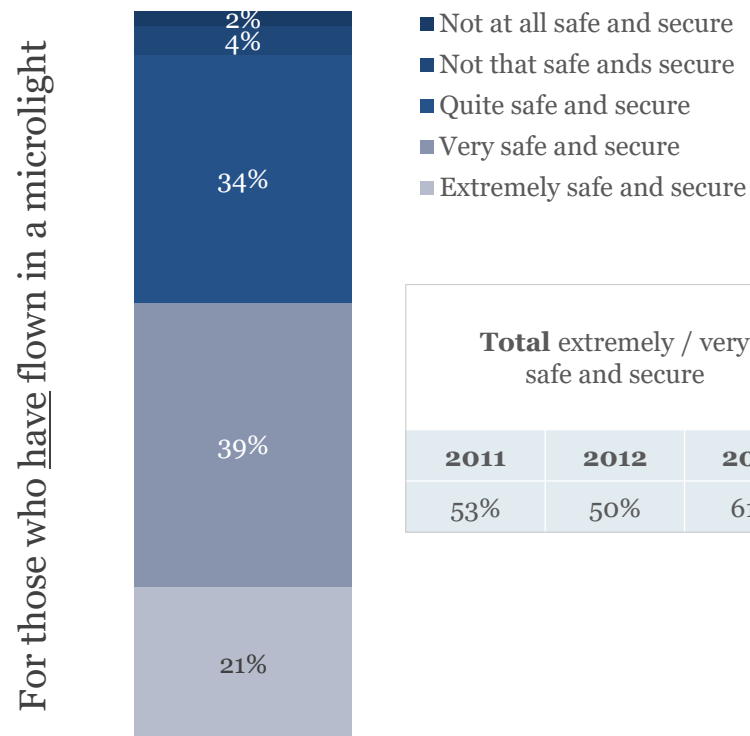
- Just 5% of NZ resident travellers have flown in a microlight in New Zealand, but this is a higher proportion than in 2012 (3%).
- Two thirds (63%) of those who have flown in a microlight view the activity as carrying some degree of risk. Those who have never flown in a microlight in New Zealand regard it as riskier than those who have (84%).
- 6 in 10 (61%) of those who have flown in a microlight in New Zealand feel 'extremely' or 'very' safe and secure about flying and undertaking aviation activities in New Zealand. While this result is consistent with 2012 a higher proportion gave an 'extremely' safe and secure rating this year (21% cf. 3% in 2012).
- No other changes since 2011.

Q Q13. Please indicate how risky you think each of these activities is to the personal safety of the people that undertake them

PERCEIVED RISK OF FLYING IN A MICROLIGHT	<u>Have not flown in a microlight</u> (n=1,101)			<u>Have flown in a microlight</u> (n=61)		
	2011	2012	2014	2011	2012	2014
Extremely / very risky		45%		23%		
Quite risky		40%		40%		
Not that / not at all risky		16%		37%		
Total extremely / very / quite risky	84%	82%	84%	60%	54%	63%

Q Q12. Thinking about all aspects of aviation safety and security in New Zealand, overall how safe and secure do you feel when you fly or undertake one of the activities mentioned in the last question?

How safe and secure people who have flown in a microlight feel when flying or undertaking aviation activities in New Zealand



Bases: Resident travellers who have not flown in a microlight (2011 n=974; 2012 n=968; 2014 n=1,101), Resident travellers who have flown in a microlight (2011 n=25*; 2012 n=32; 2014 n=61). Don't know responses excluded *Caution - low base size, results must be treated with caution

Perceptions of paragliding / hang gliding



KEY RESULTS

- Only 5% of NZ resident travellers have been paragliding or hang gliding in New Zealand.
- Three quarters (75%) of those who have been paragliding or hang gliding in New Zealand associate these activities with some level of risk. Those who have not been paragliding or hang gliding in New Zealand consider it to be more risky than those who have (89%).
- 6 in 10 (61%) of those who have been paragliding or hang gliding in New Zealand feel 'extremely' or 'very' safe and secure about flying and undertaking aviation activities in New Zealand.
- No changes since 2011.

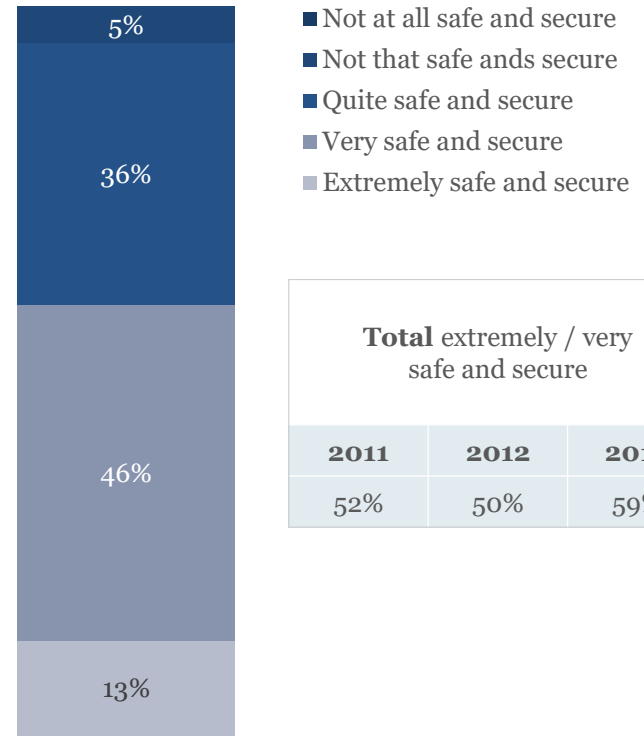
Q13. Please indicate how risky you think each of these activities is to the personal safety of the people that undertake them

PERCEIVED RISK OF PARAGLIDING / HANG GLIDING	<u>Have not paraglided / hang glided</u> (n=1,133)			<u>Have paraglided / hang glided</u> (n=53)		
	2011	2012	2014	2011	2012	2014
Extremely / very risky		50%		40%		
Quite risky		38%		35%		
Not that / not at all risky		11%		25%		
Total extremely / very / quite risky	89%	89%	89%	75%	68%	75%

Q12. Thinking about all aspects of aviation safety and security in New Zealand, overall how safe and secure do you feel when you fly or undertake one of the activities mentioned in the last question?

How safe and secure paragliding / hang gliding feel when flying or undertaking aviation activities in New Zealand

For those who have paraglided / hang glided



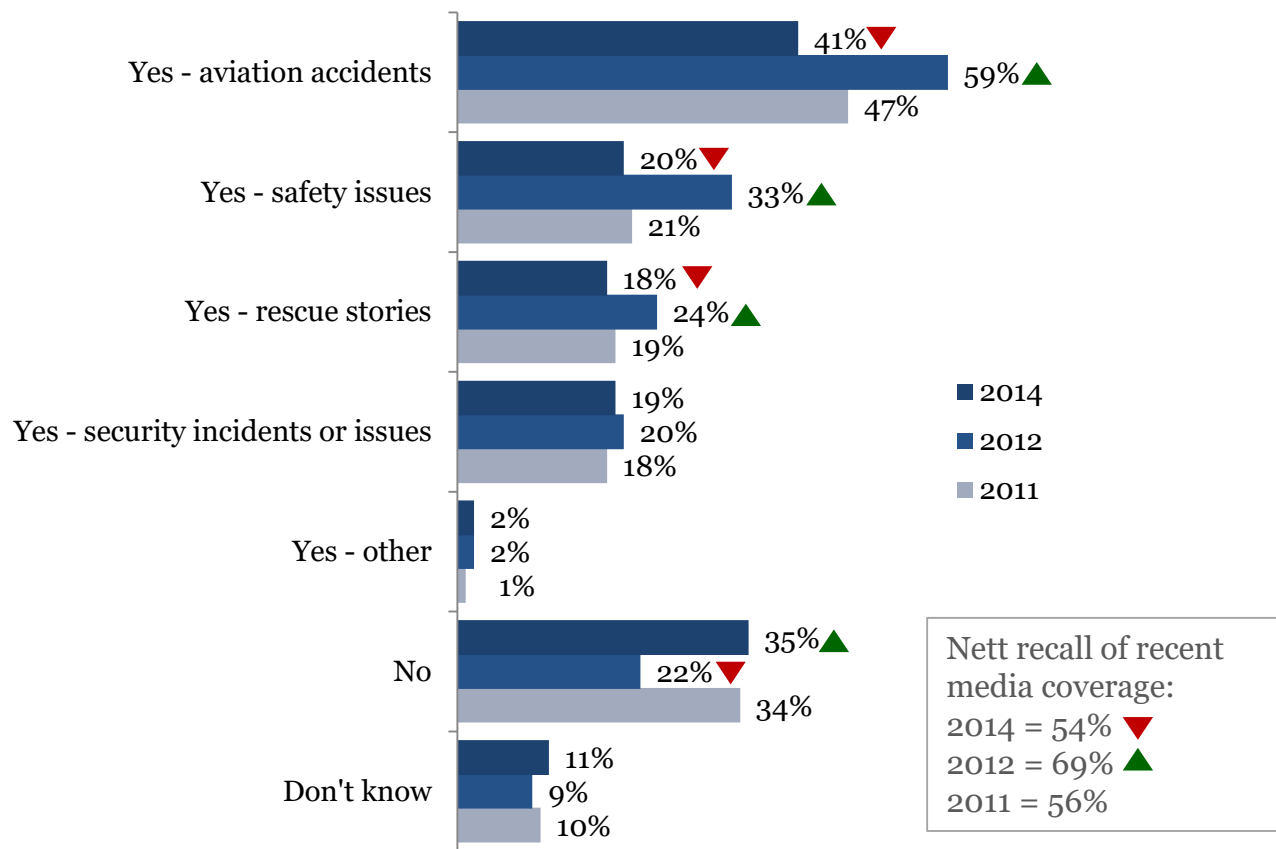
Total extremely / very safe and secure		
2011	2012	2014
52%	50%	59%

Bases: Resident travellers who have not paraglided/hang glided (2011 n=968; 2012 n=982; 2014 n=1,133), Resident travellers who have paraglided/hang glided (2011 n=48; 2012 n=36; 2014 n=53). Don't know responses excluded

Despite the range of high-profile aviation incidents this year fewer people recall recent media coverage of civil aviation safety and security incidents

Q14. Have you seen, read or heard anything recently about civil aviation safety and security in New Zealand – rescue stories, issues or accidents?

Recall of recent media coverage of civil aviation safety and security



Aviation accidents (41%) remain the main thing NZ resident travellers have recently seen, read or heard about civil aviation safety and security in New Zealand. However, people are less likely to remember recent media coverage of this and most other types of civil aviation safety and security incidents now than in 2012.

Considering the extensive coverage of the two Malaysia Airlines flights this finding is perhaps surprising but may be due to people considering the Malaysia Airlines flights as terrorist rather than civil aviation incidents.

A list of aviation accidents and related stories covered by the media prior to and during the interviewing period are provided on pages 5 to 7 of this report.

Base: All NZ resident travellers (2011 n=1,036; 2012 n=1,052; 2014 n=1,229)

▲▼ Significantly higher/lower than previous wave of research

TV news remains the main source of information about civil aviation and security in New Zealand – while rankings of information sources haven't changed there have been falls for hearing about civil aviation and security incidents via TV, newspapers and radio

Q15. Which of the following places have you seen, heard or read anything recently about civil aviation and security in New Zealand?

Source of information about civil aviation and security in New Zealand



2014 | 83% ▼
2012 | 90% ▲
2011 | 86%

01. T V NEWS



2014 | 53% ▼
2012 | 65%
2011 | 65%

02. NEWSPAPER STORY



2014 | 45%
2012 | 43%
2011 | 40%

03. INTERNET NEWS STORY



2014 | 29% ▼
2012 | 40% ▲
2011 | 34%

04. RADIO



05. FRIENDS/FAMILY



2014 | 14%
2012 | 15%
2011 | 16%

06. INTERNET CIVIL AVIATION/ AVIATION SECURITY WEBSITE



2014 | 5%
2012 | 3%
2011 | 4%

07. TV ADVERTISING



2014 | 5%
2012 | 3%
2011 | 3%

08. TRAVEL AGENTS



2014 | 2%
2012 | 2%
2011 | 1%

Base: All NZ resident travellers who have seen, heard or read anything about civil aviation and security recently (2011 n=585; 2012 n=762; 2014 n=687)





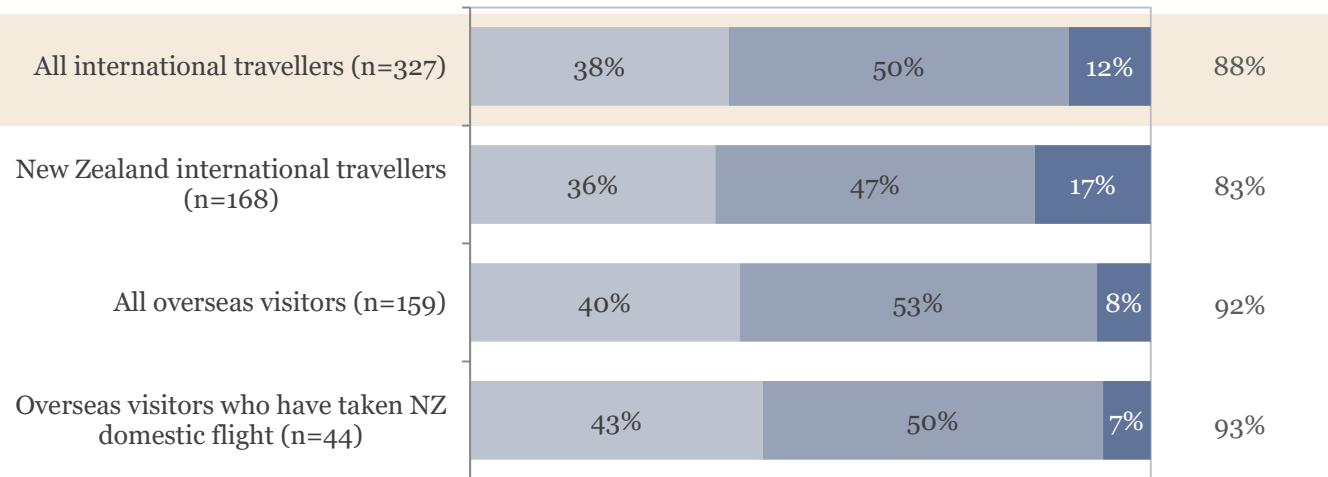
International traveller Survey Results

Large majority of those travelling internationally from New Zealand feel 'extremely' or 'very' safe and secure when flying within or from New Zealand

Q Q6. Overall how safe and secure do you feel travelling either on domestic flights in New Zealand or international flights departing from New Zealand?

Overall perceptions of feeling safe and secure on flights in, or from, New Zealand

TOTAL
extremely/very
safe and secure



- Extremely safe and secure
- Very safe and secure
- Quite safe and secure
- Not that safe and secure
- Not at all safe and secure
- Don't know

While all groups are very positive about their safety and security when flying in or to New Zealand overseas visitors are more positive in their ratings than New Zealand based international travellers.

Results are consistent over time

Q Q6. Overall how safe and secure do you feel travelling either on domestic flights in New Zealand or international flights departing from New Zealand?

Total extremely / very safe and secure

	2011	2012	2014
All international travellers	83%	85%	88%
New Zealand international travellers	80%	83%	83%
All overseas visitors	86%	90%	92%
Overseas visitors who have taken a New Zealand domestic flight	87%	96%	93%

Bases: All international travellers (2011 n=310; 2012 n=325; 2014 n=327), New Zealand international travellers (2011 n=161; 2012 n=188; 2014 n=168), All overseas visitors (2011 n=149; 2012 n=137; 2014 n=159), Overseas visitors who have taken NZ domestic flight (2011 n=47; 2012 n=54; 2014 n=44)

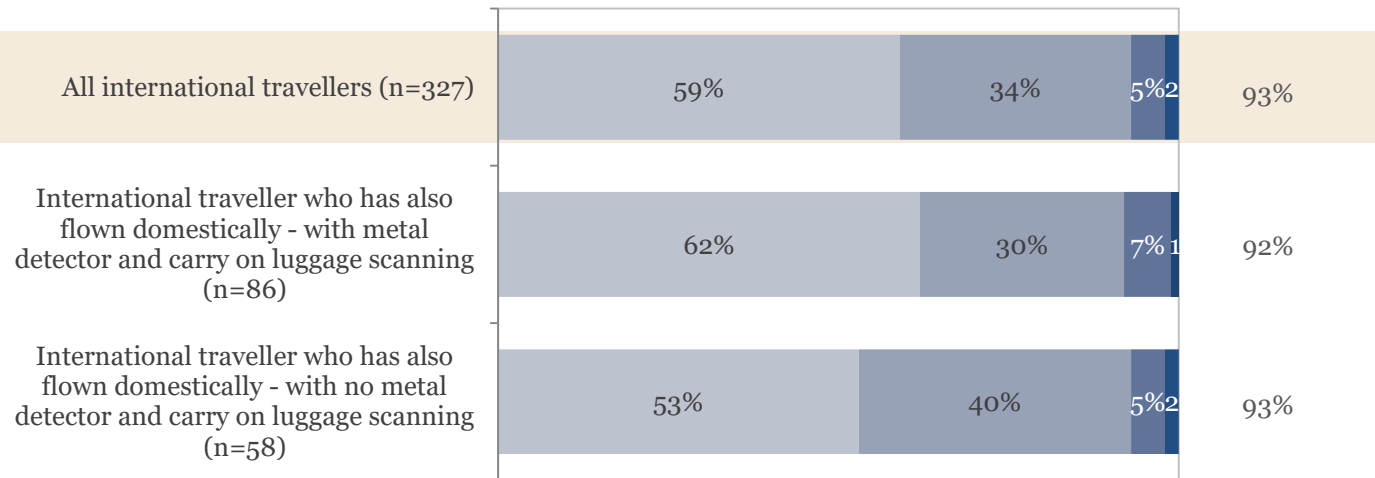
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Brunton**
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Near universal agreement that the security measures experienced at airports in New Zealand will ensure in-flight safety

Q Q4. How satisfied are you that the security measures you've experienced at New Zealand airports will keep you safe and secure for the duration of a flight?

Overall perceptions of security checks at New Zealand airports



- Very satisfied
- Quite satisfied
- Neither
- Quite dissatisfied
- Very dissatisfied
- Don't know

Those international travellers who have flown domestically in New Zealand and were not screened by metal detectors or had their carry on luggage scanned show almost identical satisfaction levels to those who were screened by metal detectors/had their carry on luggage scanned pre-flight.

No changes over time

Q4. How satisfied are you that the security measures you've experienced at New Zealand airports will keep you safe and secure for the duration of a flight?

Total satisfied

	2011	2012	2014
All international travellers	94%	94%	93%
International travellers who have also flown domestically – with metal detector and carry on luggage scanning	96%	95%	92%
International travellers who have also flown domestically – with no metal detector and carry on luggage scanning	84%	93%	93%

Bases: All international travellers (2011 n=310; 2012 n=325; 2014 n=327), international travellers who have also flown domestically – with metal detector and carry on luggage scanning (2011 n=103; 2012 n=115; 2014 n=86), international travellers who have also flown domestically – with no metal detector and carry on luggage scanning (2011 n=52; 2012 n=59; 2014 n=58)

Just six international travellers felt dissatisfied that the security measures experienced in New Zealand airports would keep them safe and secure for the duration of their flight. Most who were dissatisfied are male. Greater consistency in airport security practises and reducing the perception that airport staff are racist would improve most of these travellers' satisfaction levels.

“Well they probably should all be the same. Every airport's got different security measures. Invercargill and Nelson - no-one's ever looked at my bags there. Rotorua is pretty lax - there's not a lot of security there either. Whereas Queenstown, Wellington, Auckland they all seem to be pretty good, they've got constant security. I think you need some sort of security in those smaller airports - the presence of a security guard might help or an x-ray machine.” | (New Zealand male aged 45 to 54 years)

“Should be consistent across all international airports. New Zealand is not consistent with other international airports/very lackadaisical.” | (Canadian female aged 45 to 54 years)

“Sometimes the security staff checking your passport when you arrive can be quite aggressive about why you are here. Also the security staff who check your passport when you leave are the same - my friends from Saudi Arabia have the same experience - it's whenever your passport is presented. I understand that the staff are doing their job and doing it for the safety of the country but they could be friendlier when they do it.” | (Male aged 18 to 24 years based in 'other'* country)

“They were racist, did not behave properly at immigration and security.” | (New Zealand male aged 35 to 44 years)

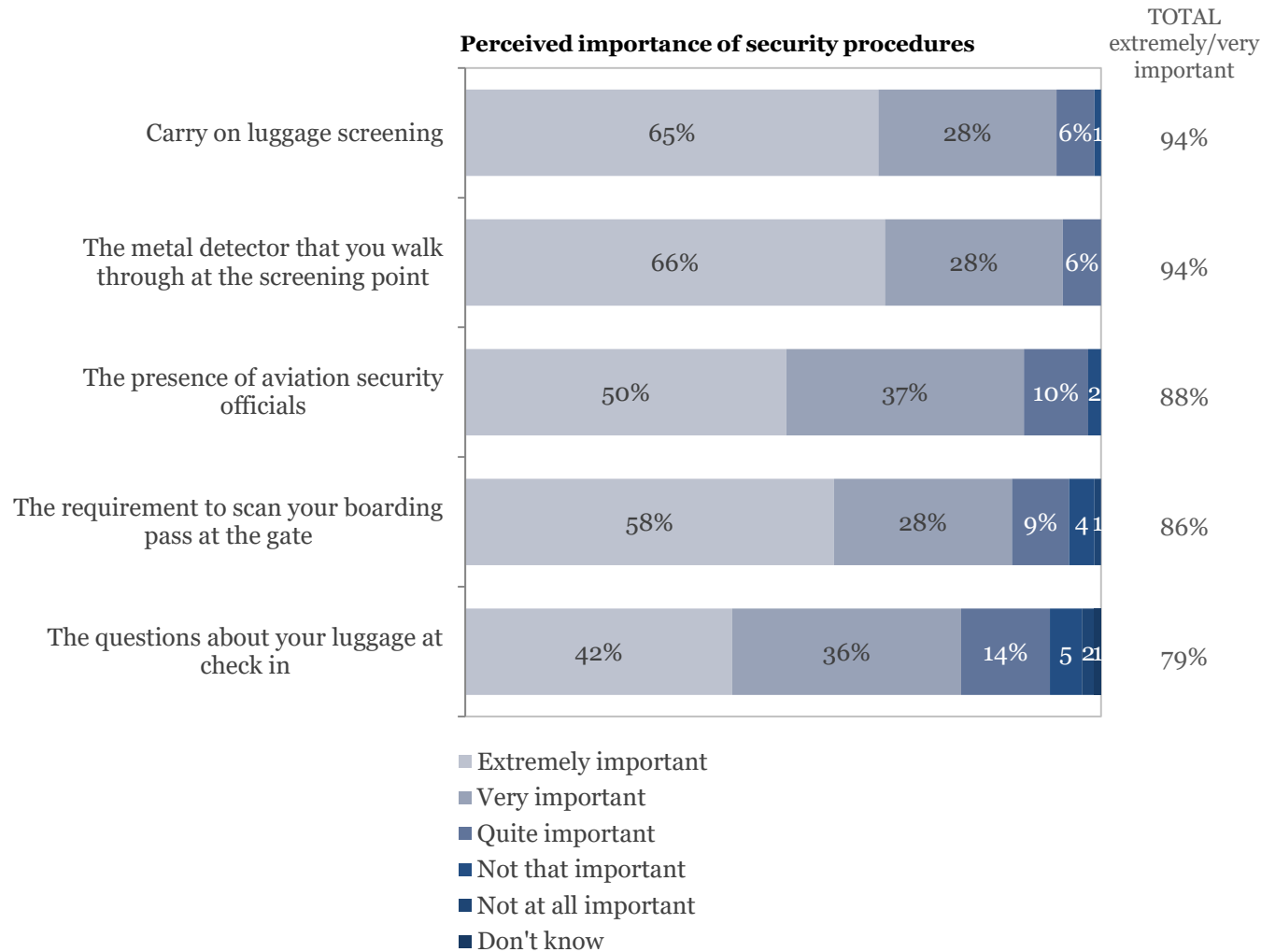
“Security staff should observe the passenger, when they book ticket, to know family background or anything. As I am chemist if I am bad person, I can make anything which can harm.” | (Male aged 55 to 64 years based in 'other'* country)

“Water should be allowed if it is sealed.” | (Australian male aged 25 to 34 years)



The scanning of carry on luggage and use of metal detectors are seen as the most important security precautions

Q Q8. Please indicate how important or unimportant you think each of these security procedures is in keeping people safe and secure when they fly.



Carry-on luggage screening and metal detectors are significantly more likely to be seen as important security procedures than the other measures tested.

The presence of aviation security officials and the scanning of boarding passes at the gate are the next most important procedures in the minds of international travellers, well above the questions about luggage at check in.

International travellers based in New Zealand and those who live overseas have similar perceptions of the importance of each security procedure.

The perceived importance of security procedures is stable over time

Q8. Please indicate how important or unimportant you think each of these security procedures is in keeping people safe and secure when they fly

Total extremely / very important

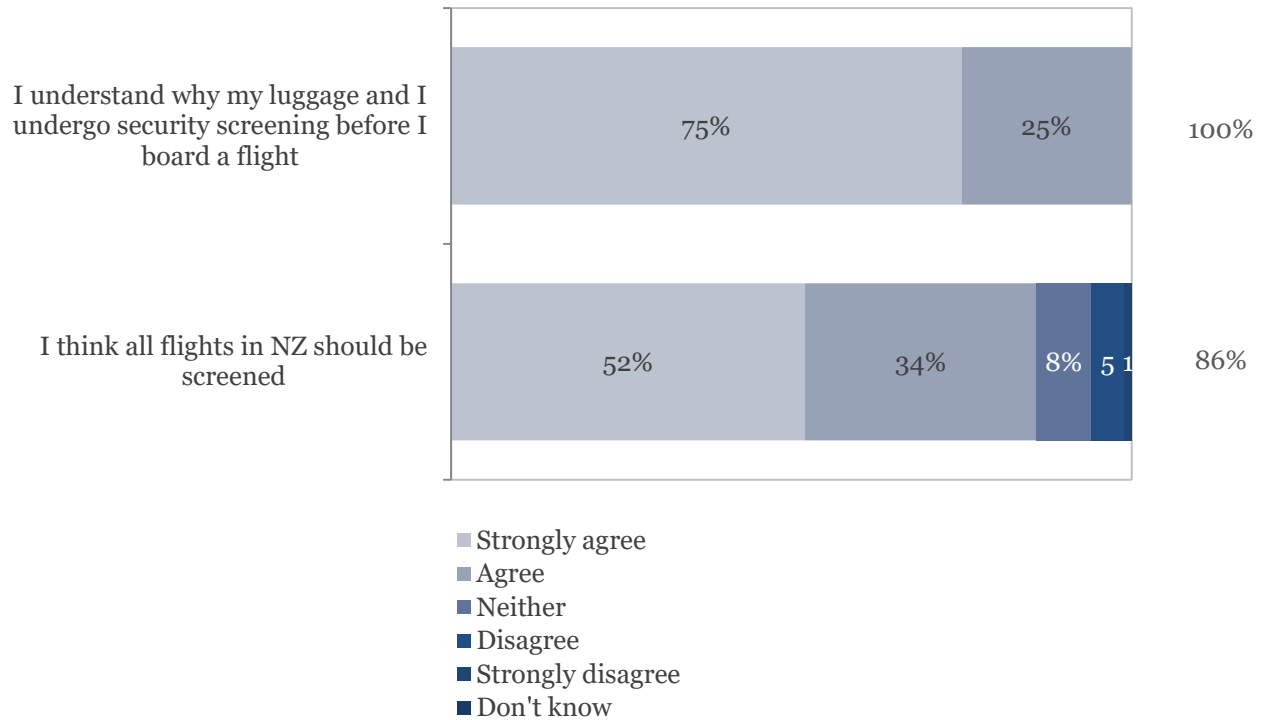
	2011	2012	2014
Carry on luggage screening	92%	93%	94%
The metal detector that you walk through at the screening point	88%	92%	94%
The requirement to scan your boarding pass at the gate	79%	82%	86%
The presence of aviation security officials	89%	83%	88%
The questions about your luggage at check-in	79%	76%	79%

Bases: All international travellers (2011 n=310; 2012 n=325; 2014 n=327)

All international travellers understand why they and their luggage are screened before a flight. There is a strong feeling that all flights in New Zealand should be screened.

Q9. Please indicate how much you agree or disagree with each statement.

Perceived understanding of need for, and opinion about, security screening



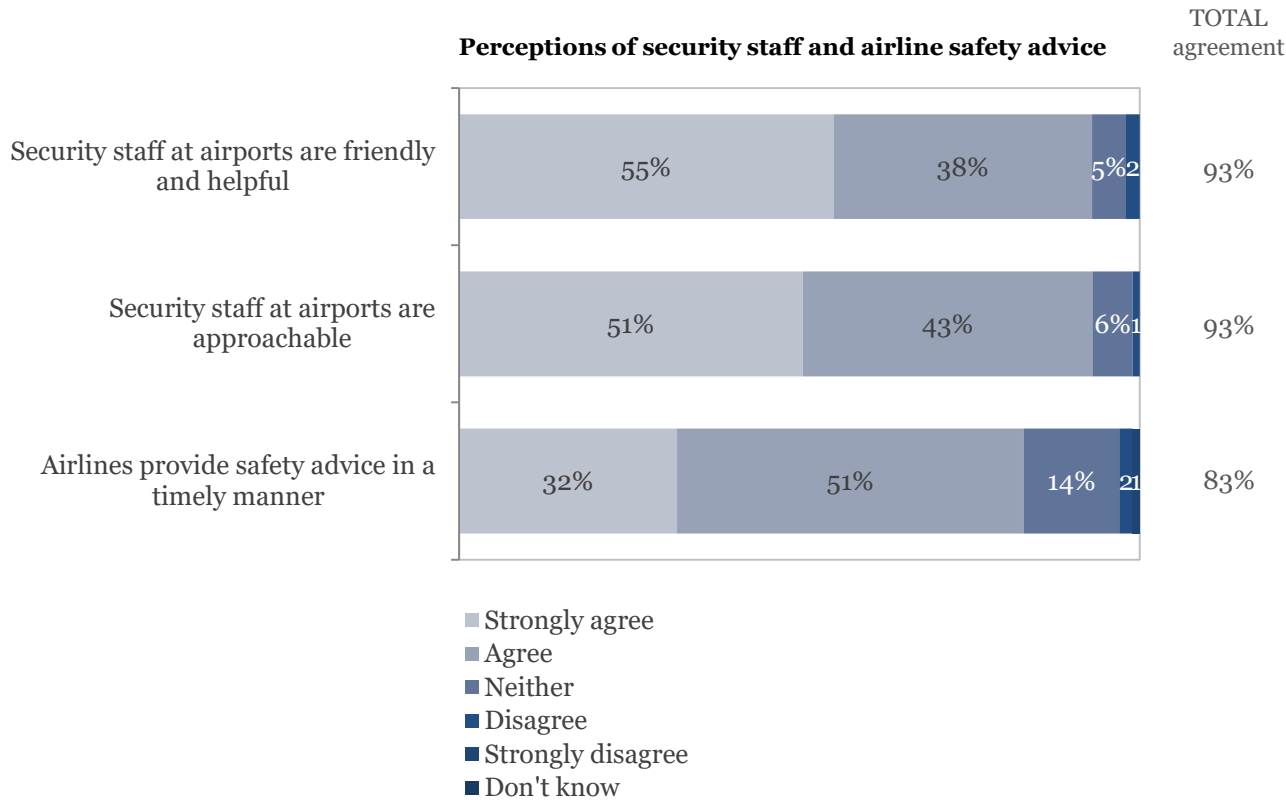
Understanding of why people and luggage are screened before a flight is consistent across both New Zealand based international travellers and those based overseas (99% and 100% respectively).

Those based overseas are more likely than New Zealanders to think that all flights in New Zealand should be screened (94% cf. 79%).

Security staff are view positively by international travellers

Q Q9. Please indicate how much you agree or disagree with each statement.

Perceptions of security staff and airline safety advice



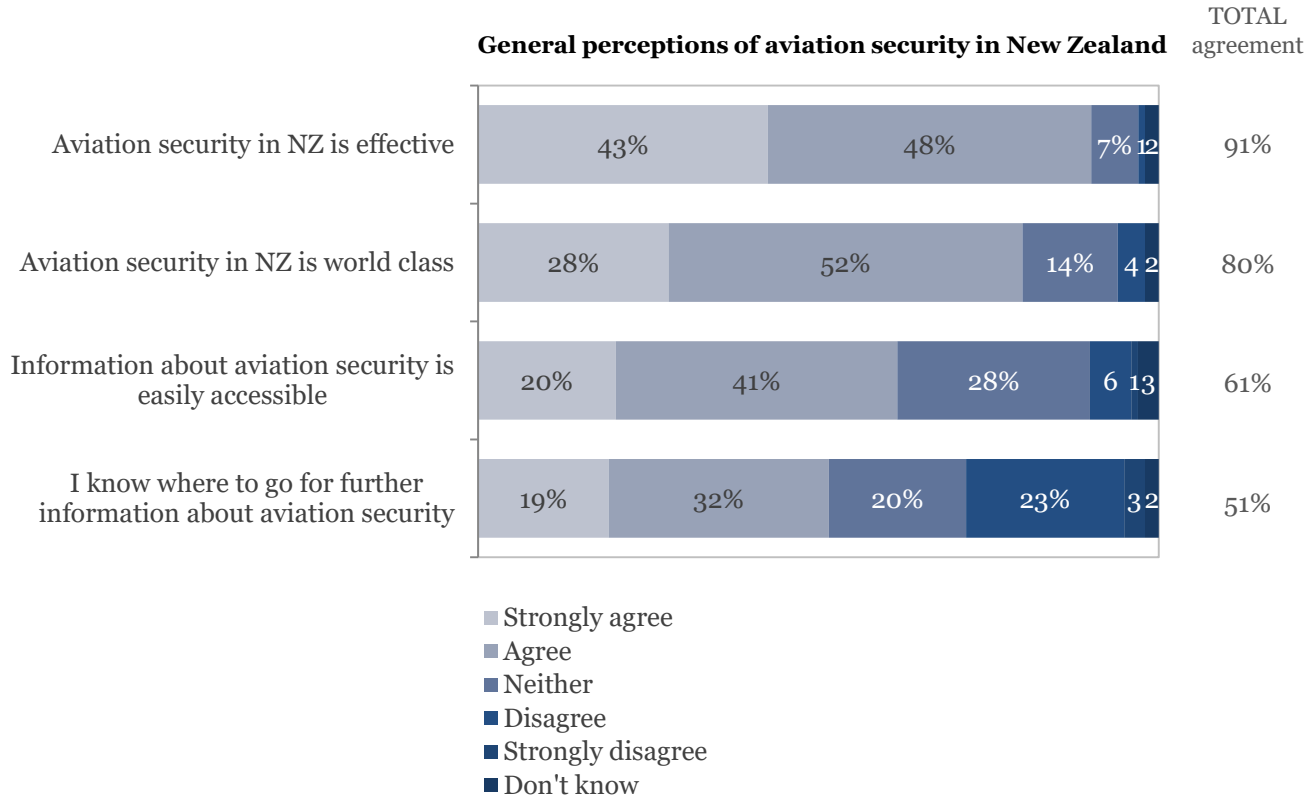
Ratings for the helpfulness/friendliness and approachability of security staff are very high.

International travellers based in New Zealand and those visiting from overseas are equally likely to be in agreement with these statements.

Aviation security in New Zealand is seen as effective, and a large majority of international travellers consider New Zealand's aviation security to be world class

Q9. Please indicate how much you agree or disagree with each statement.

General perceptions of aviation security in New Zealand



There is wide-spread agreement that aviation security in New Zealand is effective and that it is world class.

6 in 10 (61%) international travellers agree that information about aviation security is easily accessible. Just over half (51%) of international travellers say they know where to go to get further information about aviation security, significantly fewer than the proportion who think information on this topic is easily accessible.

Agreement that aviation security in New Zealand is world class is more likely to come from overseas visitors than New Zealanders themselves (86% cf. 74%). On all other statements international travellers based in New Zealand and those visiting from overseas are equally likely to be in agreement.

Perceptions of the effectiveness of security screening in New Zealand have improved since 2012, and international travellers are also now more likely to see our aviation security as world class

Q Q9. Please indicate how much you agree or disagree with each statement.

Total agreement

	2011	2012	2014
I understand why my luggage and I undergo security screening before I board a flight	100%	99%	100%
I think all flights in NZ should be screened	82%	80%	86%
Security staff at airports are approachable	89%	90%	93%
Security staff at airports are friendly and helpful	92%	93%	93%
Airlines provide safety advice in a timely manner	80%	81%	83%
Aviation security in New Zealand is effective	87%	85%	91%▲
Aviation security in New Zealand is world class	70%	73%	80%▲
Information about aviation security is easily accessible	60%	65%	61%
I know where to go for further information about aviation security	50%	52%	51%

Bases: All international travellers (2011 n=310; 2012 n=325; 2014 n=327)

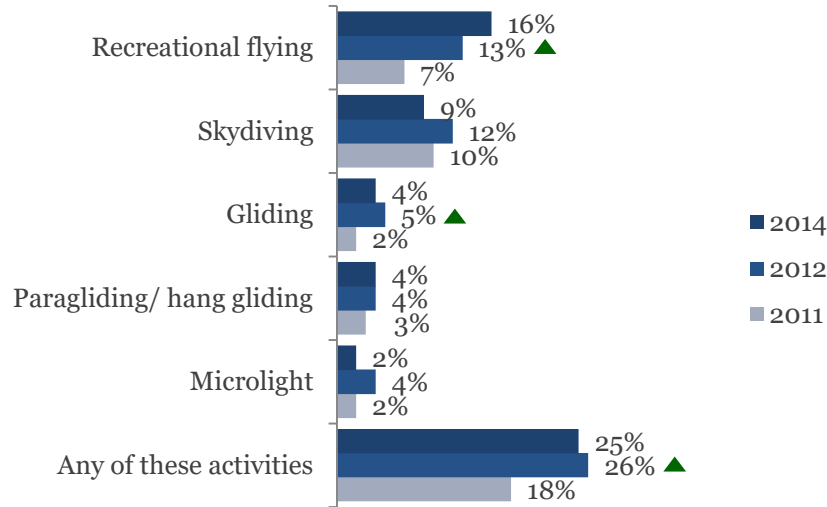
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▲▼ Significantly higher/lower than previous wave of research

A quarter of international travellers have undertaken an adventure or recreational aviation activity in New Zealand, and the large majority feel safe and secure when they take part in such activities or fly commercially in this country

Q Q10. Have you ever undertaken any of the following activities in New Zealand?



Recreational flying and sky diving remain the most common adventure/recreational aviation activities that international travellers undertake in New Zealand, with recreational flying showing an upward trend since research began.

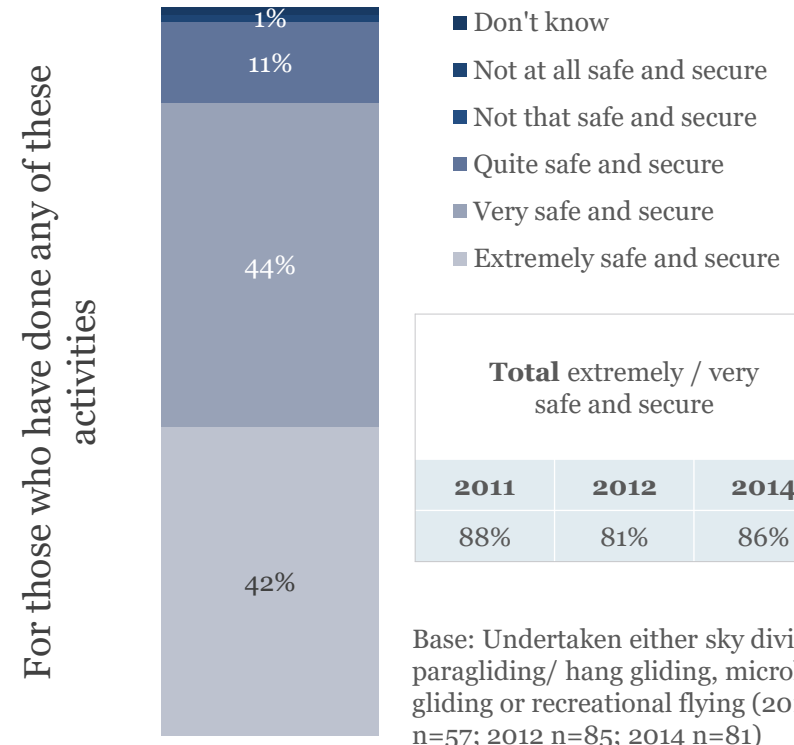
Among international travellers who have undertaken at least one of the adventure/recreational aviation activities, 86% feel 'extremely' or 'very' safe and secure when they fly or undertake one of these aviation activities. This score is consistent with that of 2012.

Bases: All international travellers (2011 n=310; 2012 n=325; 2014 n=327)

▲/▼ Significantly higher/lower than previous wave of research

Q Q11. Thinking about all aspects of aviation safety and security in New Zealand, overall how safe and secure do you feel when you fly (or undertake one of the activities we just looked at)?

How safe and secure those who have done adventure/recreational aviation activities in New Zealand feel





Please note: this year a wider group of stakeholders participated in the research. In previous years around half of the stakeholders surveyed came from groups other than monitoring/control agencies, large operators, policy agencies, operational agencies or industry reference/advisory groups. In 2014 66% of stakeholders came from other types of organisations (compared with 52% in 2011 and 45% in 2012).

Overall, similar patterns appear in findings for the wider stakeholder group and those working for key agencies/organisations. We have commented on these patterns but caution needs to be exercised when looking at findings for key agencies/organisations due to low base sizes (2011 n=13; 2012 n=18; 2014 n=33).

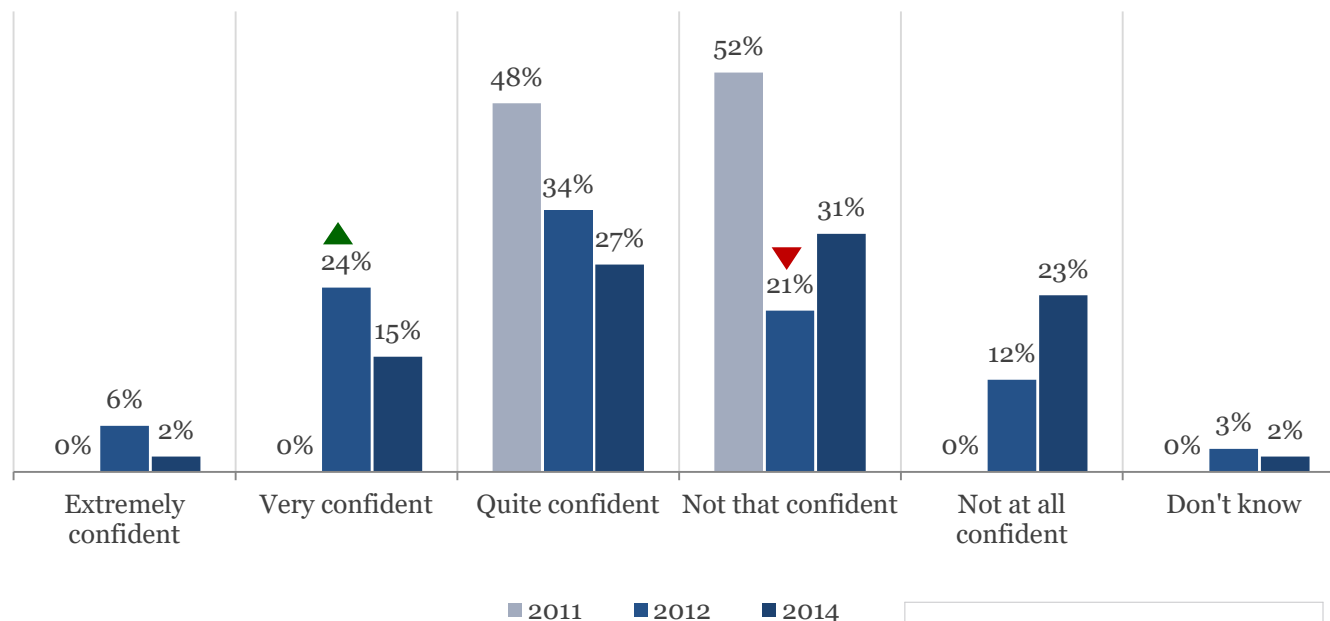
Stakeholder survey results

Care should be taken in interpreting these results due to the relatively small sample size of this group (2011 n=27; 2012 n=33; 2014 n=98)

This year overall confidence in the CAA returns to 2011 levels after the high score achieved in 2012

The Civil Aviation Authority has two arms. One arm, the CAA, is responsible for regulating all civil aviation activities. The other arm, Avsec, provides aviation security services at some designated airports and for all international flights to and from New Zealand.

Q Q2a. Thinking about all of the activities that CAA undertake, how confident are you in the management of CAA to provide effective safety and security measures for the aviation industry in New Zealand?



Total extremely / very/ quite confident		
2011	2012	2014
48%	64%	44%

Confidence in the CAA has fallen – though not significantly – since 2012. Current results are consistent with the scores achieved in 2011.

Among those involved in key agencies/organisations confidence has also declined.

Base: All stakeholders (2011 n=27; 2012 n=33; 2014 n=98)

▲▼ Significantly higher/lower than previous wave of research

For many stakeholders their confidence is based on their impressions of senior CAA staff

“My confidence derives from the interactions I have had with senior staff from the CAA. I do not have any real experience of operational staff at the CAA. However the professionalism and capability of an organisation is largely influenced by the culture and example set by senior leaders. I think that the organisation has the right culture and people to achieve its safety and security objectives.”

| (Very confident in CAA)

“Past experience gives me the confidence. Monitoring of safety events by CAA is thorough and timely. Their intervention in some instances is appropriate, but they monitor and keep an oversight. CAA audits are usually well focused and administered - they have a mature approach of assessing risk and directing their audit attention accordingly.”

| (Very confident in CAA)

“It is clear from meetings with the top team that they are a highly capable professional group.”

| (Very confident in CAA)

“The openness of the CAA to speak freely without the 'covering your ass' mentality and 'blame' culture is critical to aviation security in my opinion. At this time I feel that the NZ CAA still has this openness.”

| (Very confident in CAA)

“It appears to me that since the CAA management (recent change at the top) have taken a more collaborative, inclusive, and negotiating role instead of the previous heavy handed role, the CAA get a more positive response back from the industry they are trying to regulate over.”

| (Very confident in CAA)

“Security surrounding access to aircraft and airfields is comprehensive. I service airside advertising displays, and while inconvenienced by having to take tools and product through security, am impressed by the thoroughness - there are no accessible 'back doors'. This attitude obviously comes from the top.”

| (Extremely confident in CAA)



There is view among some stakeholders that the CAA is divorced from the realities pilots face, and a belief that when concerns are raised there is a ‘shoot the messenger’ response from the CAA

“The CAA has become a huge bureaucracy with the majority of the staff completely divorced from the job description they hold. We have very little confidence in the ability of many of the staff to immerse themselves into their job with any in depth knowledge of the participants and how the system works in the real world.”

| (Not at all confident in CAA)

“CAA appears to focus only on paperwork, almost pointless procedure manuals and 'ticking boxes'. They operate based on 'ideals' dreamt up behind a desk, by persons wildly out of touch with reality at the coal face. Enforcement is knee-jerk reactive, with only small efforts dedicated to the far more useful ambulance at the top of the cliff (e.g.: Avkiwi seminars, Vector content). Costs of operating huge buildings, highly inefficient processes, large V6 rental cars transporting single staff members and excessive, 'dead wood' staff are expected to be funded mainly by those participants in aviation who cannot afford the people to represent their interests. The strong impression is that private GA is targeted for removal.”

“For the majority of CAA, the people employed in their department are not at all or only slightly experienced in the real-world application of their role. Specifically, a rule writer writing a rule for pilots to obey is not a pilot. Instead, they are often a lawyer who's job is to follow ICAO stuff and cover the CAA's arse. Secondly, when CAA has a session of consultation, almost all of the recommendations received from the aviation community are rejected, and for proof of this, you can simply browse the consultation reviews from the last 10 years. When I personally had a safety concern about an aviator, I was not able to have it dealt with in a professional manor, but was subjected to a very nasty side of CAA. I will not be raising any safety concerns again.”

| (Not at all confident in CAA)

“The management of the CAA pay only lip service to 'safety'. They maintain incomplete safety data, do not engage in proactive safety related initiatives like making general aviation meteorological information freely available and accessible to pilots, and they do not practice a just culture within their organisation. Messengers are ignored or at best tolerated but seldom listened to.”

| (Not at all confident in CAA)



For some operators the fees charged by the CAA are seen as a barrier to aviation safety

“The outrageous increases in levies, fees and charges. Through costs, decreasing the safety of flying by applying costs to flight plans. By introducing costs to meteorological forecasts, thus reducing the safety of flying compared with all other forms of recreation. By not following up with reported incidents relating to suitability of persons holding CAA licences. e.g. recent balloon incident.” | (Not that confident in CAA)

“Charges are so expensive that it is financially straining most industry participants. When financially strained, safety is more likely to be compromised. The current CAA policy does not encourage safety.” | (Not that confident in CAA)

“CAA has become a corporate identity that has reduced information available to the private sector with excessive charges for licencing, aircraft registration and met services.” | (Not that confident in CAA)

“Based on recent CAA behaviour any changes would be top heavy and charged back to the individuals who are being 'helped', making everything more difficult, more hassle and more expensive.” | (Not that confident in CAA)

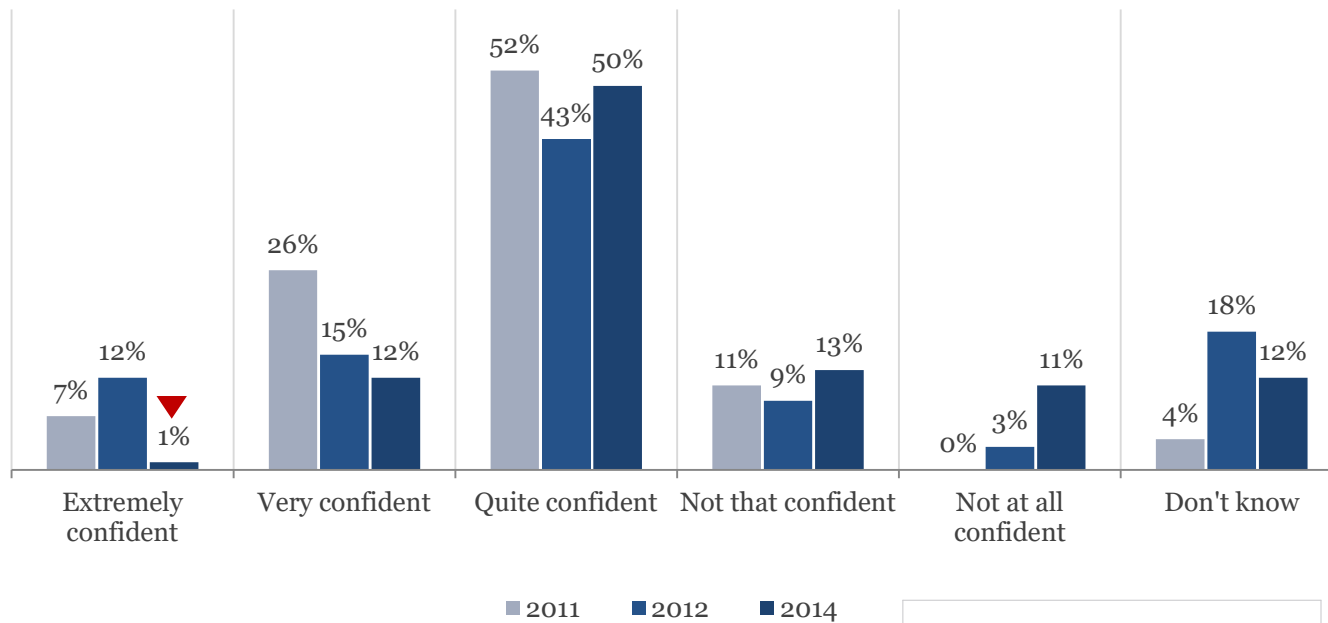
“CAA appears to act in the interests of CAA. The organisation draws attention to safety matters in a manner as to justify CAA’s authority and budget. Any actual positive safety outcome is fortuitous.” | (Not that confident in CAA)



Overall confidence in Avsec continues to decline

The Civil Aviation Authority has two arms. One arm, the CAA, is responsible for regulating all civil aviation activities. The other arm, Avsec, provides aviation security services at some designated airports and for all international flights to and from New Zealand.

Q Q3a. Thinking about all of the activities that Avsec undertake, how confident are you in the management of Avsec to provide effective safety and security measures for the aviation industry in New Zealand?



Total extremely / very/ quite confident		
2011	2012	2014
85%	70%	63%

Base: All stakeholders (2011 n=27; 2012 n=33; 2014 n=98)

Stakeholders' confidence in the management of Avsec to provide effective safety and security measures for the aviation industry in New Zealand is trending downwards. Low base sizes mean the drops are not statistically significant, but a pattern has emerged showing a downward trend.

Among those involved in key agencies/organisations confidence in Avsec is stable compared to 2012 (72% cf. 70% now). Please note this finding is indicative only due to low base size in 2012 (n=18).

Few stakeholders made comments about why they feel confident in Avsec, but among those who did the quality of Avsec's team is the basis of their confidence

“The AVSEC staff and processes I have been involved with are adequate as far as I can tell.” | (Very confident in Avsec)

“Meeting with the head of Avsec gives me confidence that he would run the service to a high level.”
| (Very confident in Avsec)

“Past experience and people at the top.” | (Quite confident in Avsec)

“In my dealings they seem to provide a good service, if sometimes a bit overenthusiastic.” | (Quite confident in Avsec)



Lack of confidence tends to be due to the belief that Avsec's activities are focused on the *appearance* of maintaining security

"I am very concerned that we may simply 'follow the Americans' and become security paranoid and create the stupid atmosphere of fear that exist in the USA, whereby ordinary people are treated as criminals first. I have no faith at this time that Avsec will not simply 'bend over' to America." | (Not that confident in Avsec)

"90% of what Avsec has done is pure theatre at the behest of foreign governments that are obsessed with security threats that don't exist in any other environment other than their own. The only blessing we have is that our Avsec staff aren't allowed guns and haven't 'accidentally' shot anyone yet." | (Not that confident in Avsec)

"Avsec seem more interested in public perception rather than actual security control e.g. Auckland domestic terminal allows ground staff uncontrolled access to and from the ramp directly through simple code access doors. The staff that traverse these areas like loaders are arguably the largest risk factors of the staff demographic with direct access to aircraft. They come and go through the doors around the baggage belts with their personal bags filled with anything they wish with absolutely no control. They could easily place devices in aircraft holds and do not need to get on the aircraft. Yet in public areas, staff are happy to make public fuss over pilots, arguably less risk of most, about minor infringements such as personal effects, as it makes for good public security theatre." | (Not that confident in Avsec)

"Punitive attitude towards GA. Operations are more theatre than reality - but admittedly this is a world-wide problem. Actively dissuades the general public from participating or showing any interest in aviation by adopting a threatening guilty-unless-proven-innocent approach." | (Not at all confident in Avsec)

"Not that confident as security is either total or nothing. Percentage checking only leaves room for error." | (Not that confident in Avsec)

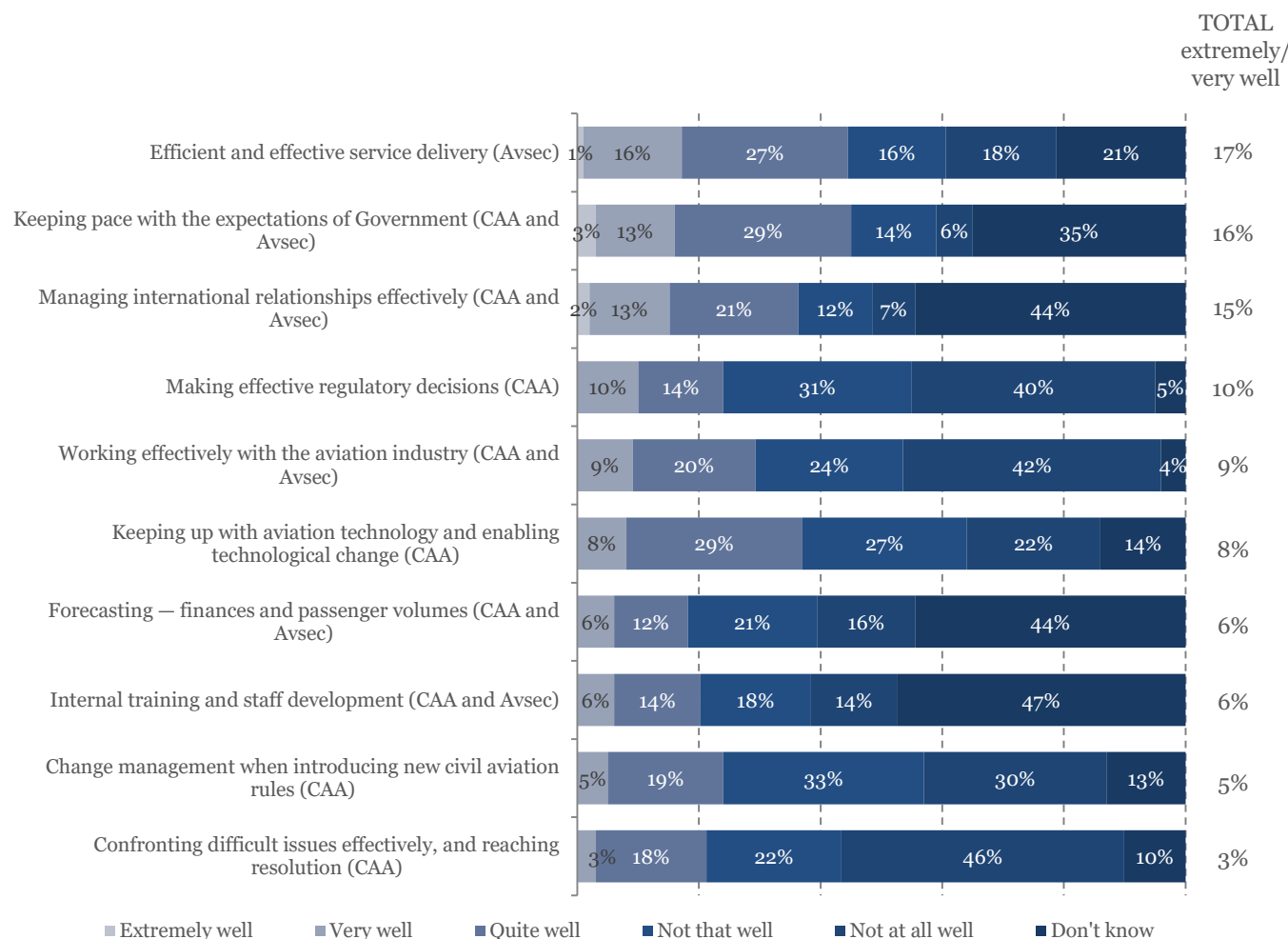
"There are a number of holes in the system which have been explained to officials but the response is negative." | (Not that confident in Avsec)

"Management is lacking if the Minister of Transport is able to violate the system at an airport." | (Not that confident in Avsec)



Perceptions of the CAA and Avsec's performance on specific management policies and practices (based on all respondents)

Q Q4. Below is a list of management policies and practices that many organisations have in place. Thinking only about the CAA and Avsec, please rate how well you think they manage each practice or policy.



As we have seen in previous years large proportions of stakeholders 'don't know' how to rate some of these performance aspects indicating a lack of familiarity with CAA/Avsec.

Therefore, we have presented this data based only on those who were able to offer an opinion on slides 66 and 67. Note that due to the reduced sample size many of the results in this additional analysis are indicative only.

There have been declines almost across the board in perceptions of the CAA and Avsec's performance on specific management policies and practices, with marked decreases for efficient and effective service delivery, working with the industry and change management

Q Q4. Below is a list of management policies and practices that many organisations have in place. Thinking only about the CAA and Avsec, please rate how well you think they manage each practice or policy.

Total extremely / very well

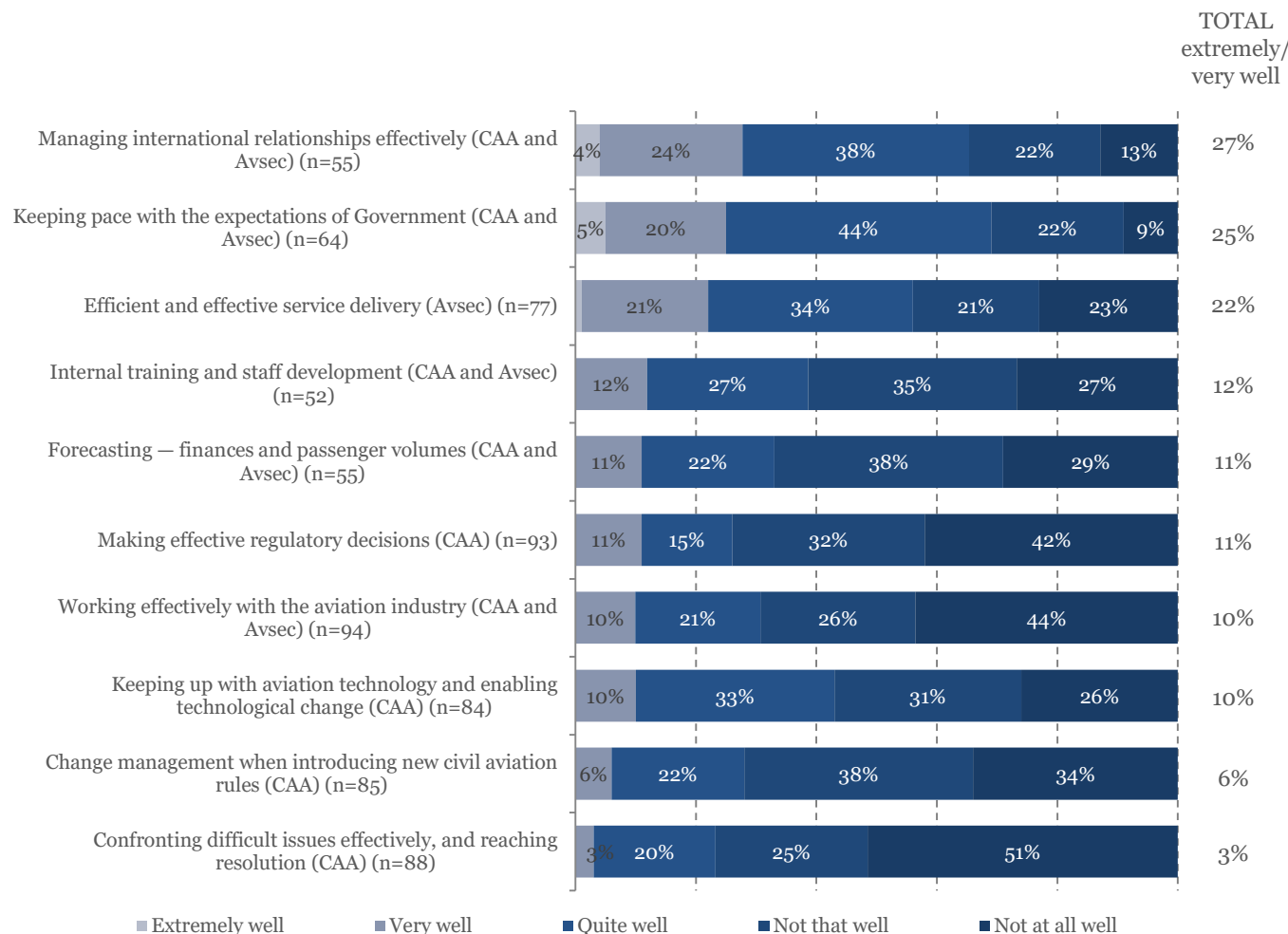
	2011	2012	2014
Efficient and effective service delivery (Avsec)	19%	37%	17% ▼
Keeping pace with the expectations of Government (CAA and Avsec)	11%	15%	16%
Managing international relationships effectively (CAA and Avsec)	11%	24%	15%
Making effective regulatory decisions (CAA)	7%	21%	10%
Working effectively with the aviation industry (CAA and Avsec)	4%	24% ▲	9% ▼
Keeping up with aviation technology and enabling technological change (CAA)	22%	12%	8%
Forecasting – finances and passenger volumes (CAA and Avsec)	15%	12%	6%
Internal training and staff development (CAA and Avsec)	4%	18%	6%
Change management when introducing new civil aviation rules (CAA)	0%	18% ▲	5% ▼
Confronting difficult issues effectively, and reaching resolution (CAA)	0%	12%	3%

Note: on most aspects similar declines can be seen among those who are involved with key agencies/organisations, however results for keeping up with aviation technology and forecasting are stable among this group.

Bases: All stakeholders (2011 n=27; 2012 n=33; 2014 n=98)

Perceptions of the CAA and Avsec's performance on specific management policies and practices (based on those who hold an opinion)

Q Q4. Below is a list of management policies and practices that many organisations have in place. Thinking only about the CAA and Avsec, please rate how well you think they manage each practice or policy.



Perceptions of the CAA and Avsec vary greatly. Stakeholders who hold an opinion on management policies or practises are most positive about CAA and Avsec's management of international relationships, their ability to keep pace with the expectations of Government and Avsec's service delivery. However, in all these areas stakeholders are less likely to say CAA and Avsec perform 'extremely' or 'very' well than they are to hold negative views of the organisations' performance:

- Managing international relationships effectively (27% 'extremely' or 'very' well cf. 35% 'not that well' or 'not at all well')
- Keeping pace with the expectations of government (25% cf. 31%)
- Efficient and effective service delivery (22% cf. 44% - a significant difference)

In all other areas fewer than one in eight (12%) stakeholders think the CAA and Avsec perform 'extremely' or 'very' well.

On almost all measure scores are lower now than in 2012. The one exception to this is keeping pace with the expectations of government, where there has been a slight improvement in stakeholder ratings of the CAA and Avsec.

Q Q4. Below is a list of management policies and practices that many organisations have in place. Thinking only about the CAA and Avsec, please rate how well you think they manage each practice or policy.

Total extremely / very well

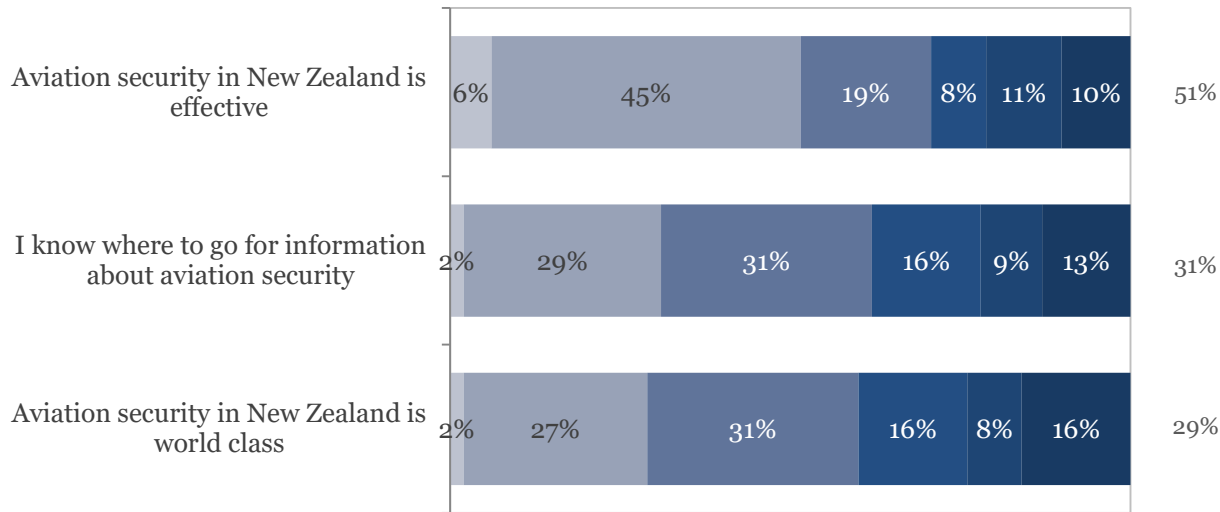
	2011*	2012*	2014
Managing international relationships effectively (CAA and Avsec)	19%	44%	27%
Keeping pace with the expectations of Government (CAA and Avsec)	16%	19%	25%
Efficient and effective service delivery (Avsec)	29%	46%	22%
Internal training and staff development (CAA and Avsec)	6%	37%	12%
Forecasting – finances and passenger volumes (CAA and Avsec)	31%	31%	11%
Making effective regulatory decisions (CAA)	7%	22%	11%
Working effectively with the aviation industry (CAA and Avsec)	4%	25%	10%
Keeping up with aviation technology and enabling technological change (CAA)	23%	13%	10%
Change management when introducing new civil aviation rules (CAA)	0%	21%	6%
Confronting difficult issues effectively, and reaching resolution (CAA)	0%	13%	3%

Base: All stakeholders who hold an opinion (2011 n=13 to 27; 2012 n=13 to 32; 2014 n=52 to 94). * Caution: small sample sizes, results are indicative only – sample sizes too small to support significance testing

Stakeholders are lukewarm in their opinion of the effectiveness of aviation security in New Zealand, and less than a third consider it to be world class

Q Q5. Below is a set of statements some people have made about the CAA and Avsec and the different ways they provide support to the aviation industry. Please indicate how strongly you agree or disagree with each statement.

General perceptions of aviation security in New Zealand TOTAL agreement



- Strongly agree
- Agree
- Neither
- Disagree
- Strongly disagree
- Don't know

Just half (51%) of stakeholder agree that aviation security in New Zealand is effective, and very few (6%) 'strongly agree'.

Under a third (29%) think aviation security in New Zealand is world class, and just 2% 'strongly agree'.

Despite their involvement in the industry only 31% say they know where to go for information about aviation security and only 2% 'strongly agree' that they know where to go to seek further information.

It should be noted that many stakeholders were unable to give an opinion in these areas, they either 'didn't know' or 'neither agreed nor disagreed' with the statements.

There has been a decrease in knowledge of where to go for information about aviation security

Q

Q5. Below is a set of statements some people have made about the CAA and Avsec and the different ways they provide support to the aviation industry. Please indicate how strongly you agree or disagree with each statement.

Total agreement

	2011	2012	2014
Aviation security in New Zealand is effective	63%	61%	51%
I know where to go for information about aviation security	59%	64%	31% ▼
Aviation security in New Zealand is world class	45%	39%	29%

Note: results follow a similar pattern among those who are involved with key agencies/organisations.

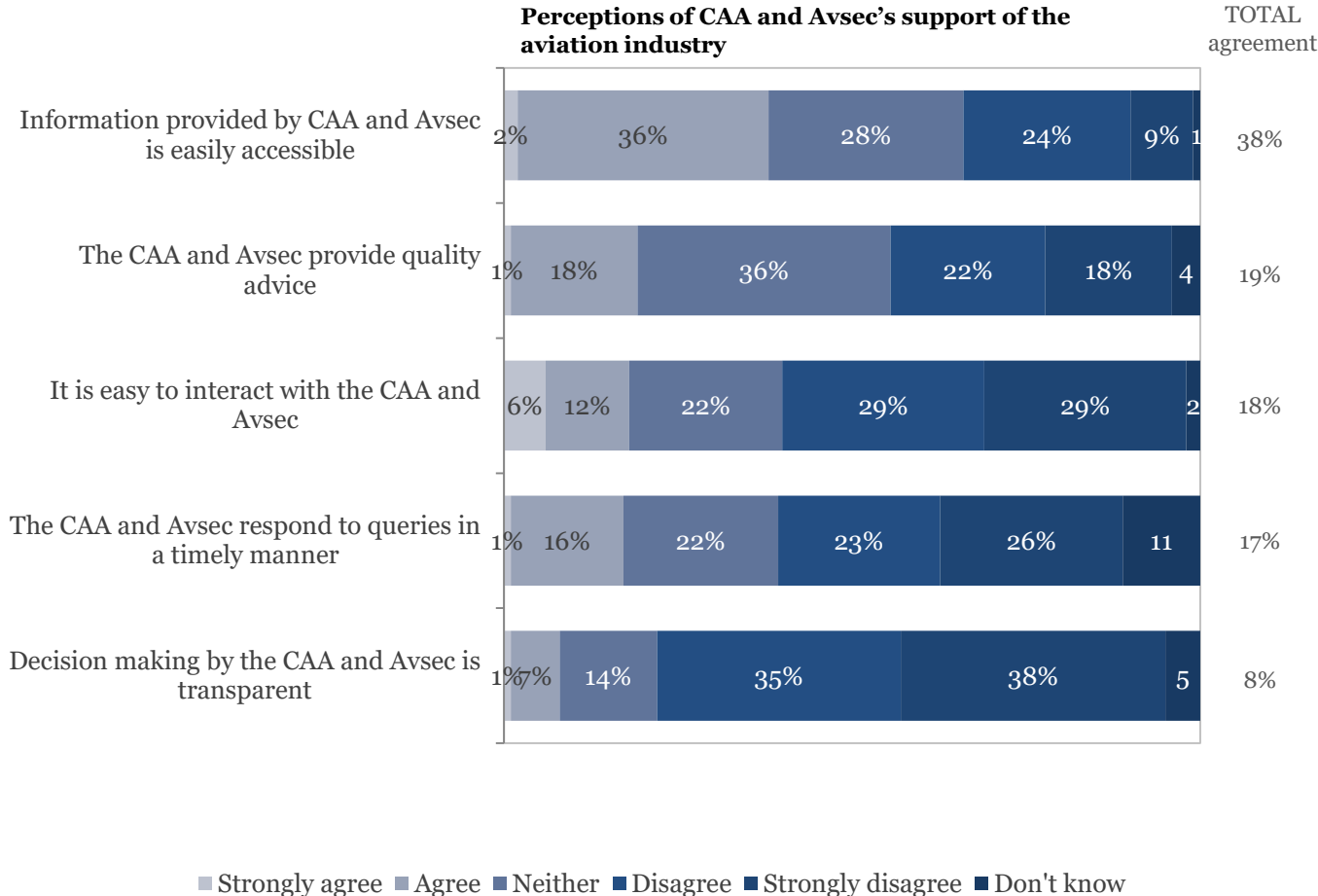
Base: All stakeholders (2011 n=27; 2012 n=33; 2014 n=98)

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Stakeholders do not view the CAA and Avsec's support of the aviation industry positively

Q Q5. Below is a set of statements some people have made about the CAA and Avsec and the different ways they provide support to the aviation industry. Please indicate how strongly you agree or disagree with each statement.



Stakeholders are most positive about the accessibility of the information provided by the CAA and Avsec but even so fewer than 4 in 10 rate this well.

Fewer than 1 in 5 stakeholders hold positive views of the quality of advice provided by the CAA and Avsec, the ease of interacting with them or the timeliness of their responses to queries.

The area that stakeholders are least positive about is the transparency of decision making by the CAA and Avsec – just 8% hold agree that decision making is transparent.

While many stakeholders hold negative views of the support provided by the CAA and Avsec quite a few are unable to offer an opinion on each of these statements, they either 'don't know' how to respond or simply 'neither agree nor disagree', especially in relation to the CAA and Avsec providing quality advice.

There have been falls on all measures, particularly the provision of quality advice and the perceived ease of interaction with the CAA and Avsec

Q Q5. Below is a set of statements some people have made about the CAA and Avsec and the different ways they provide support to the aviation industry. Please indicate how strongly you agree or disagree with each statement.

Total agreement

	2011	2012	2014
Information provided by the CAA and Avsec is easily accessible	67%	58%	38%
The CAA and Avsec provide quality advice	26%	43%	19% ▼
It is easy to interact with the CAA and Avsec	34%	49%	18% ▼
The CAA and Avsec respond to queries in a timely manner	15%	33%	17%
Decision making by the CAA and Avsec is transparent	11%	12%	8%

Note: a similar pattern appears among those who work for key agencies/organisations.

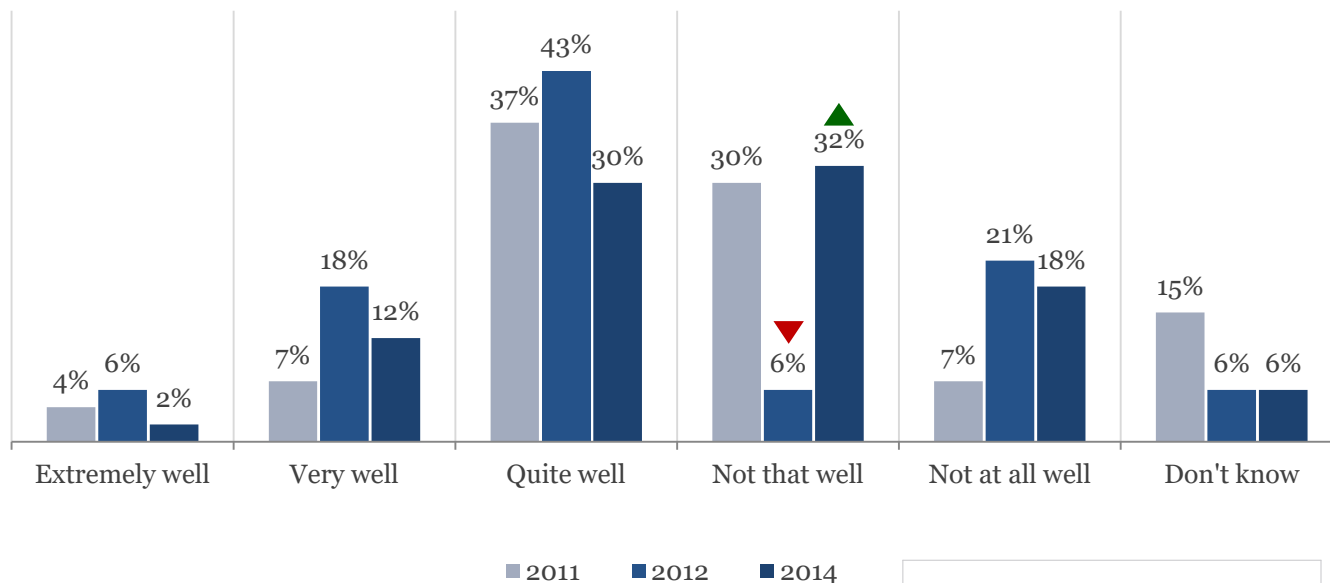
Base: All stakeholders (2011 n=27; 2012 n=33; 2014 n=98)

Perceptions of CAA's overall performance in implementing and adhering to industry safety regulations have fallen back to 2011 levels

Q

Q6. The CAA develops 'Civil Aviation Rules' which are designed to regulate safety in the industry. The Minister of Transport signs-off these rules and the CAA is responsible for over-seeing the implementation and adherence to these rules.

Thinking about all aspects of aviation security in New Zealand, overall how well do you think the CAA oversees the implementation and adherence to safety and security regulations in the industry?



Total extremely / very / quite well		
2011	2012	2014
48%	67%	44% ▼

After an upward shift in 2012 views have hardened this year, returning to 2011 levels. This is due to a marked increase in stakeholders saying the CAA does not implement and adhere to safety regulations 'that well'. Overall, half (50%) of stakeholders feel that the CAA implements and adheres to changes 'not that well' or 'not at all well'.

The fall in those rating the CAA as performing 'extremely', 'very' or 'quite' well is also present among those working in key agencies/organisations (39% now cf. 72% in 2012). Please note this result is indicative only due to low base size in 2012 (n=18).

Base: All stakeholders (2011 n=27; 2012 n=33; 2014 n=98)

▲▼ Significantly higher/lower than previous wave of research



Good interaction with the industry, responsiveness, communication and audit processes were all cited by stakeholders as examples of how the CAA is performing well

“Regular publication of VALID safety information, safety seminars which are always full of pilots (who do not have to be there), quick responses to emails and phone calls. The fact that I can pick up the phone and speak freely to a CAA person who is not defensive and is more than capable of answering my questions.”
| (CAA performing extremely well)

“They implement the rules well... It's just the rules themselves that might not suit industry and a lot of people disagree with the rules.” | (CAA performing very well)

“Fundamentally based on the certification process and subsequent audits of organisations to ensure that they are, in fact, implementing the policies the organisation expounded in their exposition. The risk analysis that CAA makes of each organisation is thorough and, to my limited knowledge, appropriate. My reservation would be the lack of authority to insist that all operators in some categories, particularly GA, be certified under a part of the Act.” | (CAA performing very well)

“They tend to prefer the approach of communication in respect of issues, rather than move straight to enforcement.” | (CAA performing very well)



There is some sense that the CAA attempts to distance itself from aviation incidents, or does not monitor the industry properly. Some stakeholders also feel that the CAA is too slow to react to changes in the industry, or is biased towards large operators.

“There are many documented cases of CAA 'dropping the ball' with regard to aviation monitoring: Air Chathams court fiasco, Airwork metro and Auckland motorway crashes inadequately investigated, Sounds Air Caravan crash inadequate investigation into management culture, Bannerman circus, Jetstar's continuing disregard for the rules ('practice' autolands to Cat 2/3 minimas), Fletcher structural failures...”

| (CAA performing not at all well)

“There are only 2 types of aviation in New Zealand: military and civil. There have been a number of accidents and fatalities in recent years in the microlight class of aviation. CAA have managed to distance themselves from these as they have an MOU with SAANZ and RAANZ and point to these areas of New Zealand aviation as being 'not really our area' although not using those words. This is a brilliant spin, and has definitely resulted in CAA ducking some bullets with regard to these accidents. If it is not military.. then it is CAA who is responsible. No question.”

| (CAA performing not that well)

“I do not know about the security side, but when it comes to aviation safety, the CAA is all about distributing blame and accepting none.”

| (CAA performing not that well)

“I think there is a real disconnect from the industry in a lot of consultation - unless you are a major player - e.g. AirNZ or other large operators who have the staff and resources to make themselves heard. CAA's consultation often appears to be a box ticking exercise, where their desired outcome is already a fait accompli.”

| (CAA performing not that well)

“Any changes to CAA regulations are very slow moving, taking a long time to catch up with technological changes and often completely overlooking the smaller operators in favour of large ones with more interaction and influence with CAA.”

| (CAA performing not that well)

“They are reactive and slow to deal with new developments/threats to aviation safety. For instance, for operators in G airspace, the operation of UAVs is an increasing risk and concern but as yet the CAA has done little to regulate or address the operation of these vehicles in uncontrolled airspace.”

| (CAA performing not that well)



Some stakeholders have encountered conflicting opinions within the CAA, which undermines their faith in the organisation. For others concerns about the CAA's operations are tied to specific challenges or a sense that the industry is over-regulated.

“When certifying an aircraft modification last year, several opinions were sought from the Certifying Unit, and on several occasions were directly contradictory when different personnel were asked the same question. Only when an industry experienced and qualified engineer began work with the department did feasible solutions begin to emerge. An emphasis on paperwork and cost recovery, not the practical aspects of plane certification, have led to a loss of confidence in the ability of the unit to do its job with engineers and homebuilders.” | (CAA performing not that well)

“If I were to seek advice on a particular rule, and if I was to speak to three people at CAA, I would get four different answers! I have been the victim of this in the past.” | (CAA performing not that well)

“The time scale for new rules is dragged out endlessly. Minds are often changed over rules (possibly government directed as well as CAA problems. This applies to rules wanted by industry as well. It appears to me that CAA has a shortage of GOOD staff members able to undertake and manage the rules process well. Also I feel that sometimes they are too worried about what sections of industry are saying (hard call I know), but sometimes you have to legislate for what you know is best despite the protests from industry or political pressure. You often have a silent majority you seem to be unaware of.” | (CAA performing not that well)

“Perhaps at main Domestic and International Airfields CAA get things going ok but they need to butt out from imposing ridiculous measures on smaller airfields. Due to the natural size and boundary distances of airfields full security fencing and other measures are just not sustainable.” | (CAA performing not that well)

“They have over regulated with too many rules, effectively killing general aviation with their rules and costs they charge both in the areas of pilot medicals and licensing.” | (CAA performing not that well)

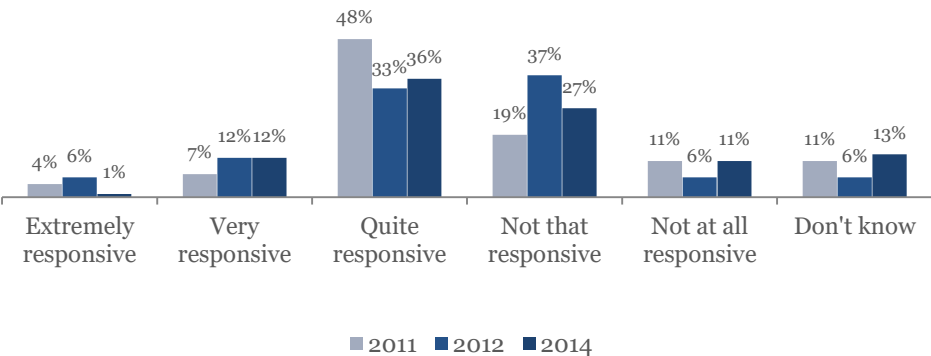
“One needs only to recall the Minister of Transport's actions recently to realise there is a lack of overseeing in this aspect.” | (CAA performing not that well)



Stakeholder's perceptions of the CAA's responsiveness and strictness in applying regulations continue to be mixed

Q10. Using the scale below, how responsive do you think the CAA is in applying the regulations?

Responsiveness of CAA in applying regulations



Total extremely / very / quite responsive

2011	2012	2014
59%	51%	49%

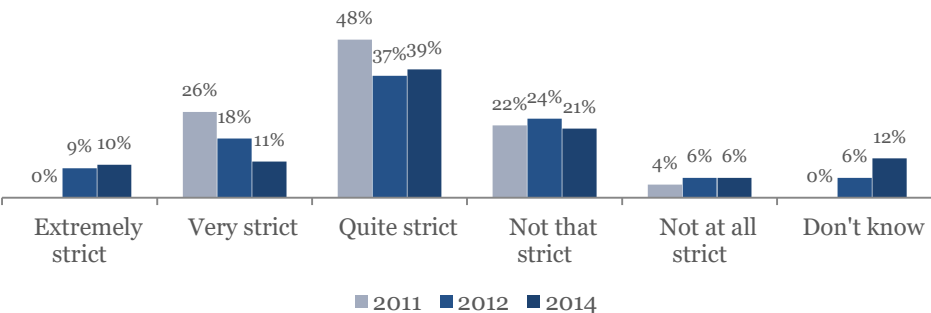
Nearly half of stakeholders (49%) think that the CAA is at least 'quite responsive' in applying the regulations. Almost 4 in 10 (38%) think the CAA is 'not that responsive' or 'not at all responsive'.

6 in 10 (60%) stakeholders say the CAA is 'extremely', 'very' or 'quite' strict in applying regulations. Over a quarter (28%) perceive the CAA to be 'not that strict' or 'not at all strict'.

There have been no changes in results since 2012.

Q11. And how strict do you think the CAA is in applying the regulations across the industry?

How strict CAA is perceived to be in applying regulations



Total extremely / very / quite strict

2011	2012	2014
74%	64%	60%

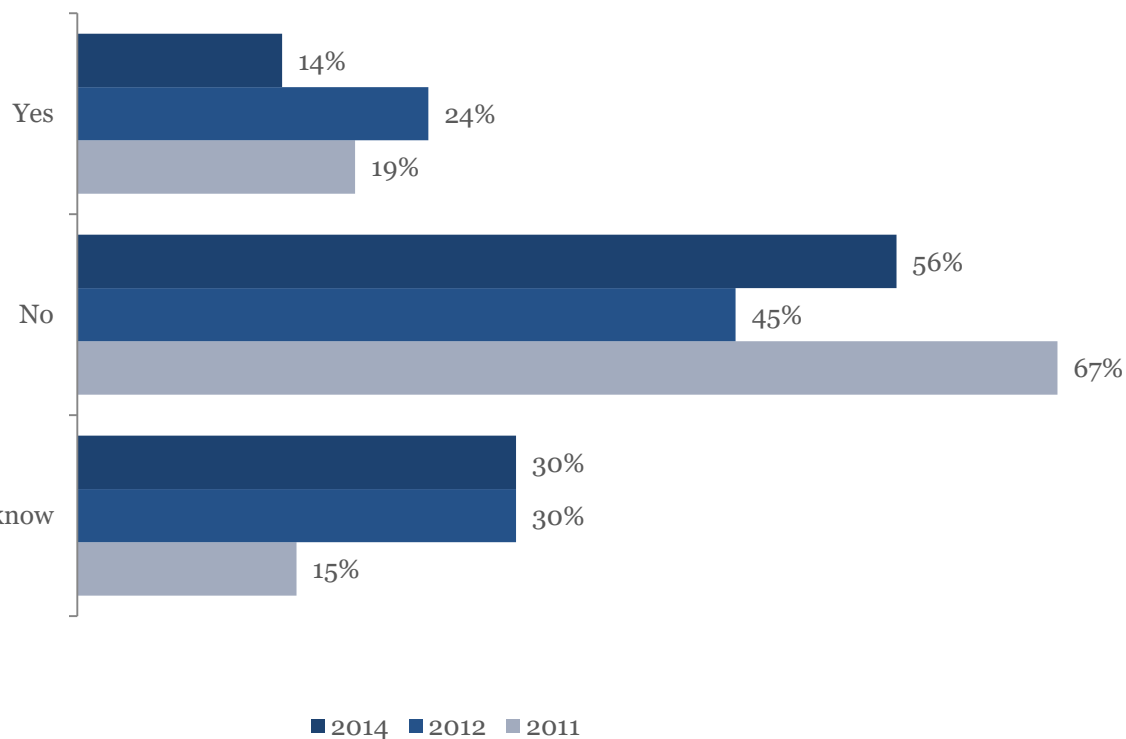
Results are also consistent among those who are part of key agencies/ organisations.

Base: All stakeholders (2011 n=27; 2012 n=33; 2014 n=98)

▲ ▼ Significantly higher/lower than previous wave of research

More than half of stakeholders do not think the CAA applies regulations consistently across the industry

Q8. Do you think the CAA apply the regulations consistently across all areas of the industry?



Just 1 in 7 stakeholders believe the CAA is consistent when applying regulation. Over half (56%) do not think that this is the case. While there has been an increase in the proportion of stakeholders feeling that there are inconsistencies the change is not significant.

The following chart provides examples of why stakeholders believe the CAA is inconsistent in applying regulations.

Base: All stakeholders (2011 n=27; 2012 n=33; 2014 n=98)

Reasons why CAA is not perceived to apply regulations consistently centre on specific examples of inconsistencies, the sense that the regulations are applied differently to different types of operators, are arrived at without due care or is due to a lack of staff

“At the last Wanaka air show, there was a Vampire offering flights to the public without having a Part 115. If they can get away with it, why shouldn't everybody? CAA officials were there and would have witnessed this, and a complaint was laid with CAA, but so far I don't think any action has been taken.”

“CAA have not applied rules regarding Trial Flights consistently and fixed-wing operators carried out Trial Flights without Part 135 certification. CAA also required commercial gliding flights to be conducted under Part 115 by a given date but, when commercial activities continued after this date without certification, no action was taken.”

“There are clear guidelines for VFR ATO's with regards day/night weather limits etc. This works well for GA. Now, with PT115, there are microlights doing ATO's in the same sort of weather, and structurally these aircraft are not up to the task. Abel Tasman microlight accident two fatal. CAA will argue that this was prior to pt115. The reality is, if it was after pt115, they would still be dead, but the operation would have had a certificate. No difference to limitations or even control over the operation. That particular operation continued with a PPL as Chief Pilot for months after that fatal accident. If that was a GA operation, it would not have been able to operate at all.”

“The medical unit is a law unto itself and appears to have been manipulated in such away to render it impervious to any outside interference that would reign its questionable activities in. The recent statement and position on colour blindness is a prime example of an individual's position and opinion being adopted without consideration to the actual perceived risk. Also positions being taken with no evidence or events to back up the theory.”

“Many rule interpretations are left to individual CAA staff to interpret for themselves and this leads to frustrating differences of opinion.”

“Enforcement is at the discretion of CAA staff and is exercised with political considerations in mind.”

“I have the clear impression that Air NZ get a quite different view of the CAA to private operators.”

“Private and small general aviation groups have to pay substantially disproportionate prices for their level of activity. Medical prices and CAA auditing pricing are extreme.”

“Some operators, particularly small ones, I feel are singled out for excess monitoring, etc., whereas I know from experience that some large operators rely that their very size can hide infringements from auditing.”

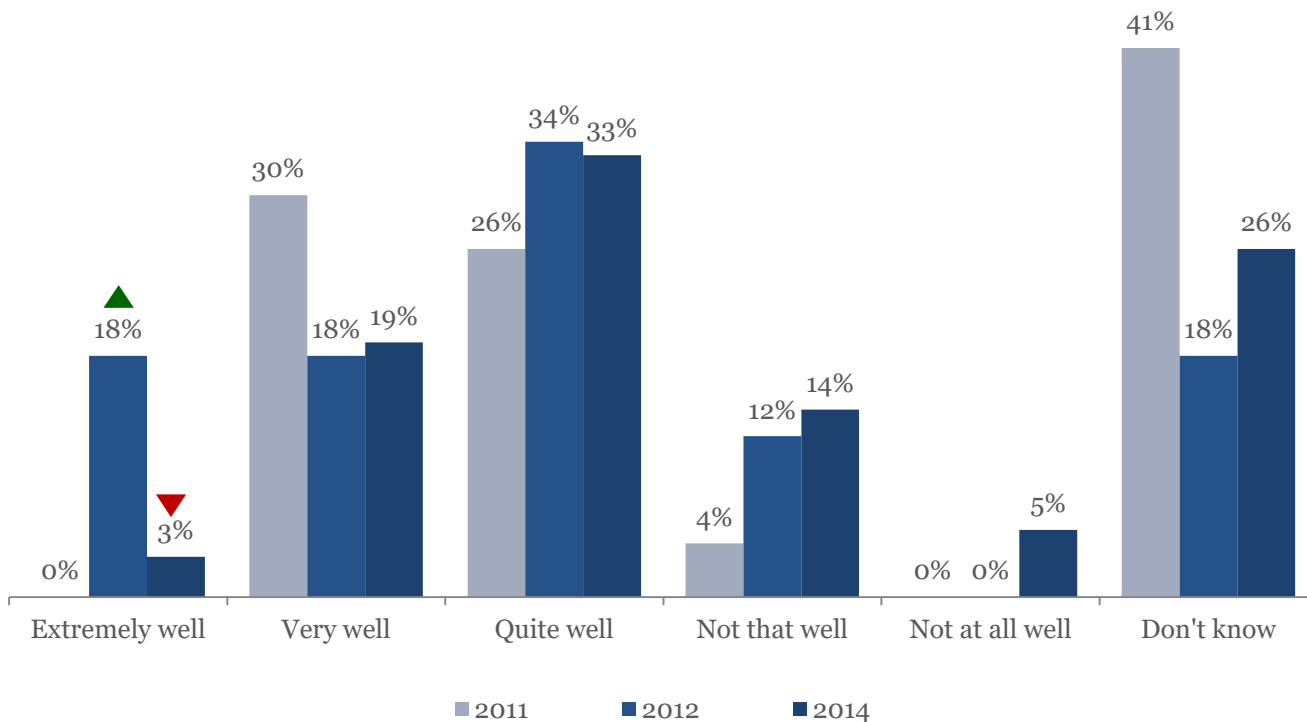
“Private GA operators seem to bear an abnormally high level of scrutiny and interference (and cost) when they are a lower risk to the general public.”

“There are not enough field staff to treat everyone equally.”



Perceptions of Avsec's delivery of aviation security services have returned to 2011 levels

Q Q12. Avsec is responsible for the delivery of aviation security services. How well do you think Avsec delivers these security services?



Total extremely / very / quite well		
2011	2012	2014
56%	70%	55%

Over half (55%) of stakeholders think Avsec delivers aviation security services at least 'quite well'. This result returns scores to their 2011 levels following an upward shift in 2012.

While the current score is not significantly lower than the 2012 result stakeholders are now significantly less likely to say Avsec delivers security services 'extremely well'.

A similar pattern is present in findings for those involved in key agencies/organisations.

Base: All stakeholders (2011 n=27; 2012 n=33; 2014 n=98)

▲ ▼ Significantly higher/lower than previous wave of research

Positive perceptions of Avsec's performance on safety and security are based on personal experience of screening and a sense that our systems are on par with those of other countries. Stakeholders who hold negative views tend to do so because they disagree with the safety and security rules. The high profile breach at Christchurch airport is used by some as an example of the rules not being applied.

Reasons for positive perceptions

"In the time they have been in existence they appear to have developed a professional image and give the travelling public confidence." | (Avsec performing very well)

"From a users perspective and comparing with other countries security activities at airports I see an efficient operation." | (Avsec performing very well)

"The delivery of services appears to be on a par with other countries." | (Avsec performing very well)

"It is clear we have a good international reputation, which is a challenge for a small country." | (Avsec performing very well)

"Only domestic and international processing. Was pleased to see that on one occasion luggage was inspected more thoroughly from an x-ray scan that detected personal aviation life-jackets (the inflation cylinders) and checked further. On this occasion Air NZ has issued a letter permitting carriage. The further inspection showed thoroughness." | (Avsec performing very well)

"Not uncommon to be subject to personal search and vehicle search when going on to an operational area." | (Avsec performing quite well)

Reasons for negative perceptions

"I still do not know why some security measures are in place, they make no sense and seem to be just 'following the international paranoia'. I am a pilot so I do have some understanding of aircraft and have worked at Heathrow for many years." | (Avsec performing not that well)

"Avsec seem to take delight in enforcing nonsensical rules that only cause cost, delay and aggravation amongst actual participants while effectively ignoring any real threats. Avsec can rate themselves as effective all they like but the standards against which they measure themselves are mostly poorly imagined lip service to actual security and safety issues." | (Avsec performing not that well)

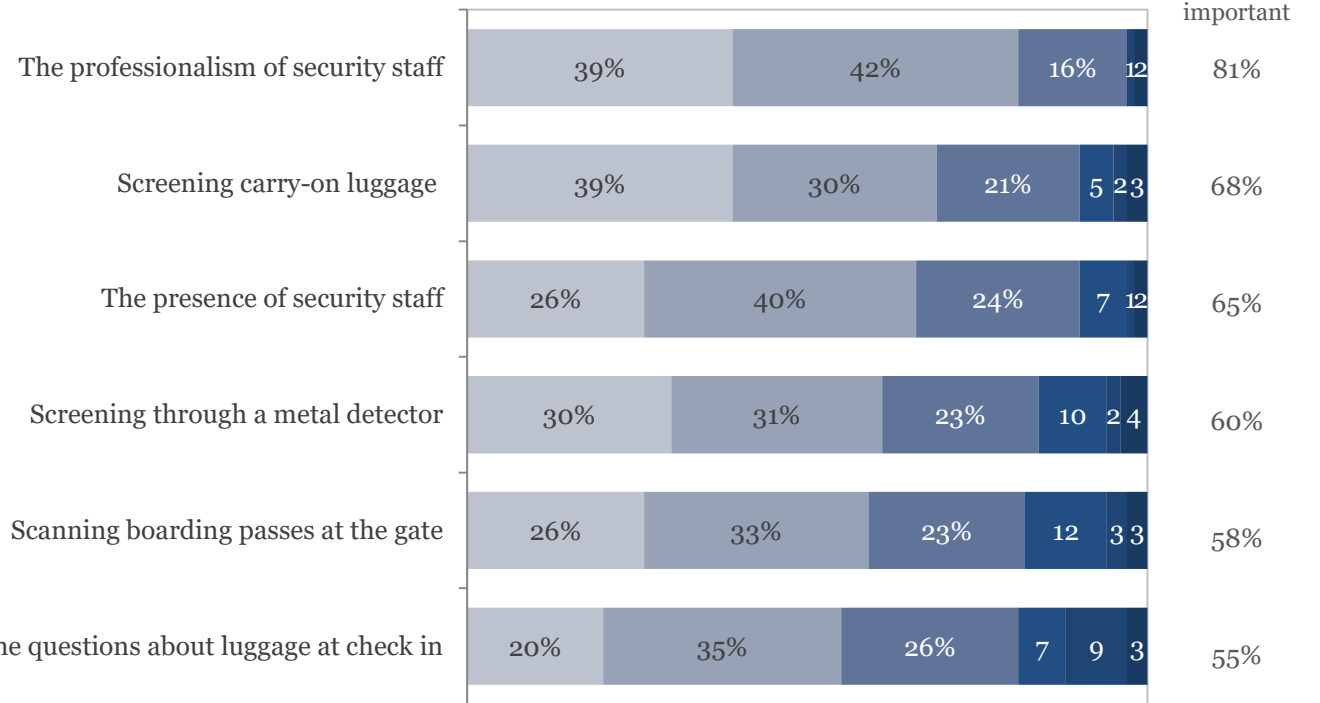
"As indicated previously, if the Minister for Civil Aviation can breach aviation security at an airport, security is not working all that well." | (Avsec performing not that well)



The professionalism of security staff is rated as the most important aspect in the overall performance of the civil aviation system

Q Q14. Domestic travellers in New Zealand, or international travellers departing from New Zealand, come in contact with security staff and undergo a number of safety and security procedures before they board their aircraft. How important is each of these procedures or contacts in contributing to the overall safety performance of the civil aviation system?

Perceived importance of security procedures



- Extremely important
- Very important
- Quite important
- Not that important
- Not at all important
- Don't know

Each of the procedures or contacts listed are seen as important in contributing to the overall safety performance of the civil aviation system.

The professionalism of security staff is regarded as the most important aspect, while questions about luggage at check in is perceived to be the least important part of the security process.

The perceived importance of each security contact/procedure has fallen since 2012, particularly the importance of luggage screening and scanning boarding passes at the gate

Q Q14. Domestic travellers in New Zealand, or international travellers departing from New Zealand, come in contact with security staff and undergo a number of safety and security procedures before they board their aircraft. How important is each of these procedures or contacts in contributing to the overall safety performance of the civil aviation system?

Total extremely/very important

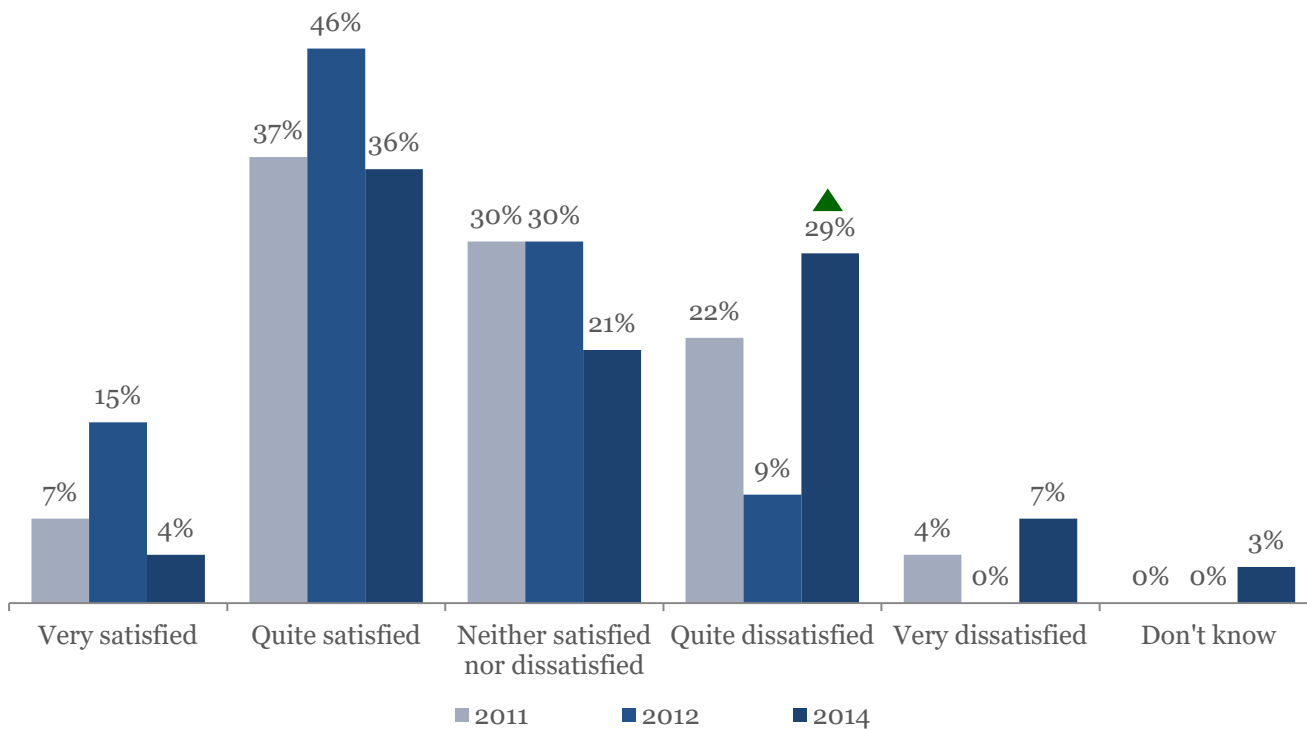
	2011	2012	2014
The professionalism of security staff	81%	88%	81%
Screening carry-on luggage	77%	88%	68%▼
The presence of security staff	77%	73%	65%
Screening through a metal detector	70%	79%	60%
Scanning boarding passes at the gate	74%	82%	58%▼
The questions about luggage at check in	63%	70%	55%

Note: the pattern of results is broadly similar among those who work for key agencies/organisations, although the falls in importance for luggage screening and the scanning of boarding passes are less pronounced.

Base: All stakeholders (2011 n=27; 2012 n=33; 2014 n=98)

Overall satisfaction with safety and security performance of the civil aviation system has declined

Q Q15. Overall, how satisfied or dissatisfied are you with the safety and security performance of the civil aviation system?



Total satisfied		
2011	2012	2014
44%	61%	40% ▼

This year just 4 in 10 (40%) stakeholders say they are satisfied with the performance of the civil aviation system. Almost the same proportion (36%) are dissatisfied.

This shift is due to an increase in stakeholders saying they are 'quite' dissatisfied. Few stakeholders hold a strong negative opinion of performance (7% 'very dissatisfied').

Nearly a quarter of stakeholders are unable to express an opinion on the overall performance of the system – 21% are neutral ('neither satisfied nor dissatisfied') and 3% are unable to answer this question.

There has also been a fall in confidence among those associated with key agencies/organisations, but to less of an extent than we see in the wider stakeholder population (48% cf. 67% in 2012). Please note that this result is indicative only due to low base size in 2012 (n=18).

Base: All stakeholders (2011 n=27; 2012 n=33; 2014 n=98)

▲ ▼ Significantly higher/lower than previous wave of research



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