

KANTAR PUBLIC

Civil Aviation Authority – Aviation Security Service

Feel Safe

2022



Aviation Security Service
— Kaiwhakamaru Rererangi —

Research programme

01



Online survey of air travellers
who live in New Zealand

02



An intercept survey of
international air travellers at
airports

Note: Further details about the research method can be found in the Appendix.

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Research objectives



Measure changes in perceptions of safety over time*



Investigate how perceptions of safety vary by different types of aviation activity



Identify the key things that influence and inform perceptions of safety



Compare demographic sub-group results to better understand perceptions across different user groups

* Only statistically significant differences at the 95% confidence level are reported.
Note: Further background information can be found in the Appendix.

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SUMMARY

Method: Survey 1. Online survey of 1,001 New Zealand resident travellers.
Survey 2. Intercept survey of 314 International travellers at Auckland airport.

Fieldwork dates: 9 to 26
September 2022

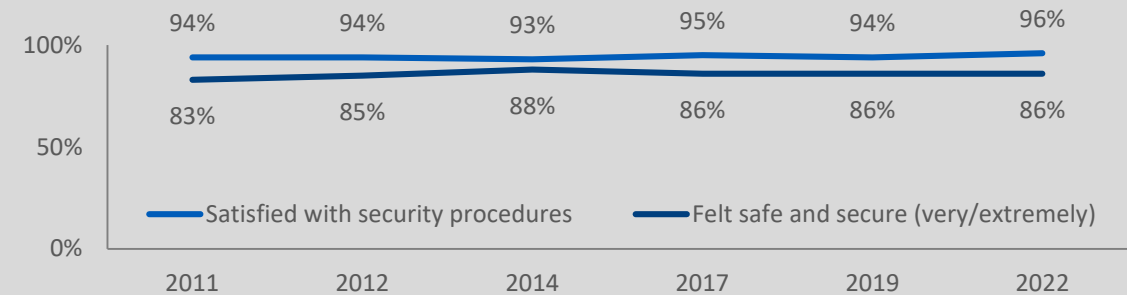
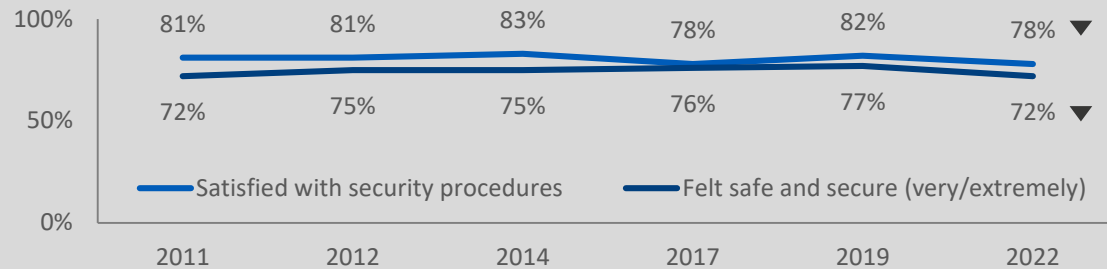
SATISFACTION WITH SECURITY PROCEDURES AND FEELINGS OF SAFETY AND SECURITY

NEW ZEALAND RESIDENT TRAVELLERS

INTERNATIONAL TRAVELLERS

This year, feelings of safety and security and general satisfaction with aviation security have declined among New Zealand travellers.

International travellers have not had the same decline in perceptions and continue to feel very satisfied, and generally very safe and secure.



We think there are two reasons for this downturn...

1. Concern about Covid precautions at the airport. Those who were happy with Covid precautions felt just as safe and secure as in 2019. The small proportion of people who thought Covid precautions at the airport were inadequate felt much less safe and secure, dragging down the overall result.
2. We've seen a general decline in sentiment towards government agencies this year. The decline has affected trust and confidence type measures rather than service interaction measures and we think it is due to a general Covid weariness.

Overseas visitors are generally more satisfied and are more likely to feel safe and secure, than New Zealand international travellers.

	Satisfied with security procedures	Felt safe and secure (very/extremely)
Overseas visitors	97%	89%
New Zealand international travellers	94%	83%

SUMMARY



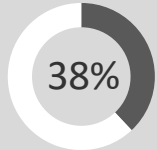
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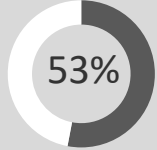


THE IMPACT OF COVID ON TRAVEL AND PASSENGERS

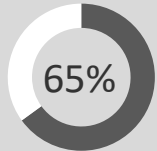
NEW ZEALAND RESIDENT TRAVELLERS



A third of New Zealand resident travellers believe that over the next couple of years Covid will continue to impact their travel decisions.



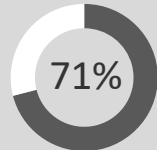
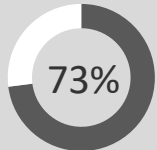
Half of travellers are concerned about catching Covid while flying.



Two thirds say it's likely the amount of air travel they do will be back to pre-pandemic levels by the end of 2023.

Airport

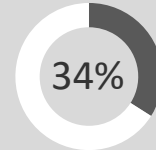
Flight



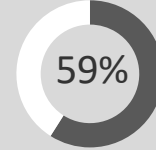
Three quarters feel the Covid precautions they experienced at the airport and during their flight were adequate.*

“Every person I know who has taken an international flight in the last 4 months came back with COVID, ALL were traced back to them being in a flying tin can.”

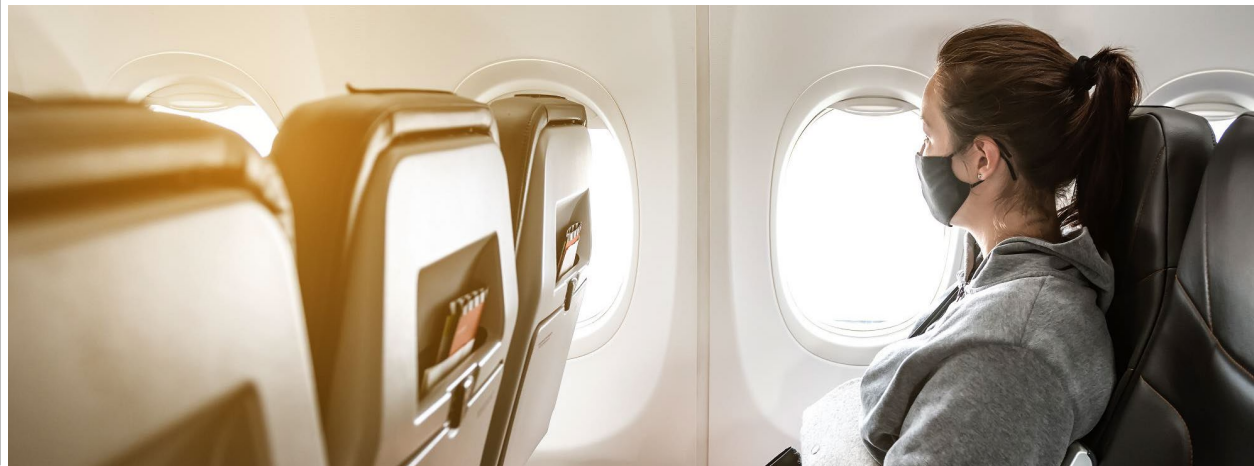
INTERNATIONAL TRAVELLERS



A third of international travellers also feel that over the next couple of years Covid will continue to impact their travel decisions.



More than half are concerned about catching Covid while flying.



*Note: fieldwork was carried out from 9 to 26 September 2022. On 13 September the New Zealand government removed almost all Covid rules and precautions. Most survey respondents based their travel experiences on flights taken prior to the removal of the restrictions. However, some respondents did travel and complete the survey after the restrictions were removed.



New Zealand Resident Traveller Survey results

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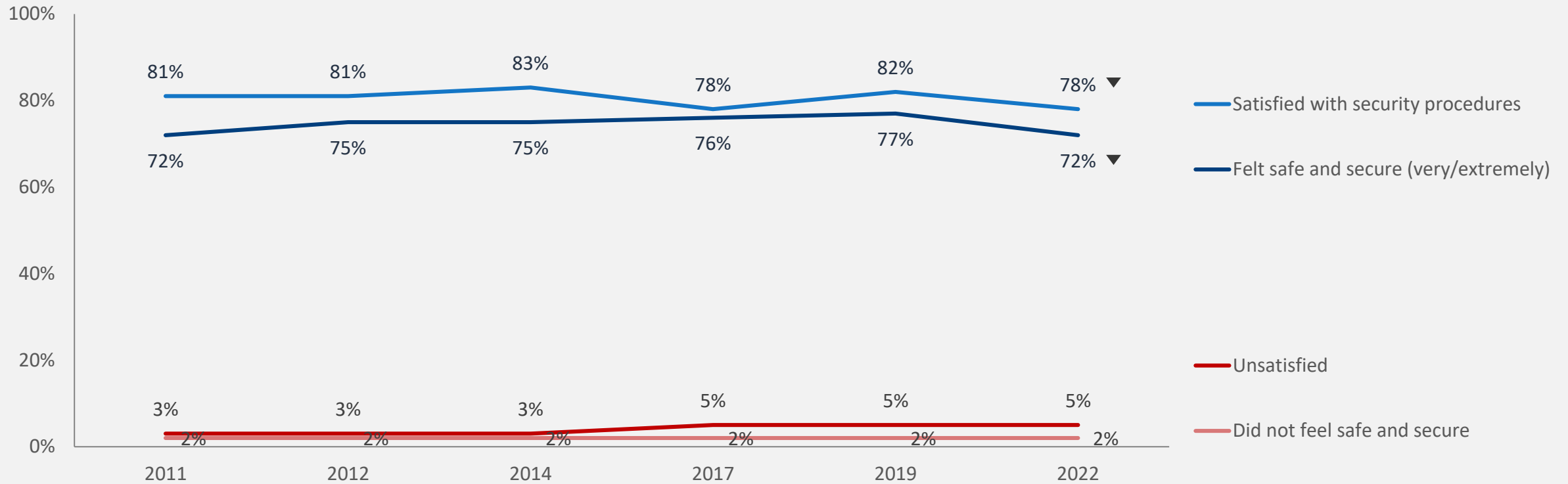
Perceptions of aviation
safety and security - based
on recent airport experiences



Aviation Security Service
— Kaiwhakamaru Rererangi —

This year, feelings of safety and security and general satisfaction with aviation security have declined among New Zealand travellers. We think there are two reasons for this downturn, which are explained on the next slide.

Satisfaction with security procedures and feelings of safety and security



Source: 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?

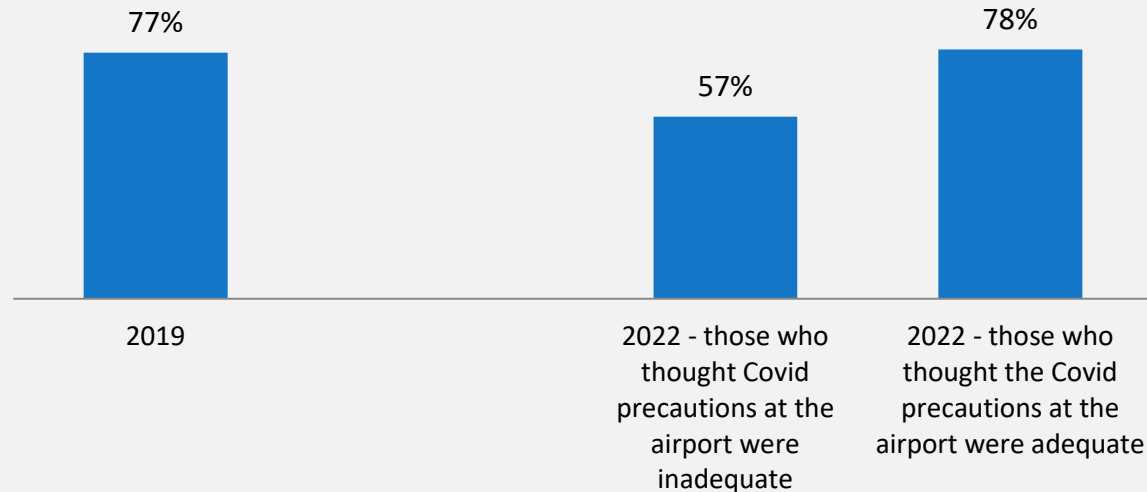
Q7. Overall how safe and secure did you feel on your most recent flight?

Base: All NZ resident travellers (2011 n=1,036; 2012 n=1,052; 2014 n=1,229; 2017 n=1,000; 2019 n=1,042; 2022 n=1,001).

The two reasons for the downturn in the overall measures are: (1) concern about Covid precautions, and (2) a general sentiment shift towards government agencies.

Reason 1 – Concern about Covid

People who thought the Covid precautions at the airport were adequate, felt just as safe and secure on their most recent flight as everyone did in 2019 (% extremely / very safe and secure shown below). The relatively small proportion of people who thought Covid precautions at the airport were inadequate (7% - see later in report), felt much less safe and secure, dragging down the overall result.



Reason 2 – Sentiment shift

We've seen a general decline in sentiment towards government agencies this year. The decline has affected trust and confidence type measures rather than service interaction measures and we think (but have little direct evidence) it is due to a general Covid weariness ('Covid hangover').

The size of the declines we've observed in our tracking studies range from:

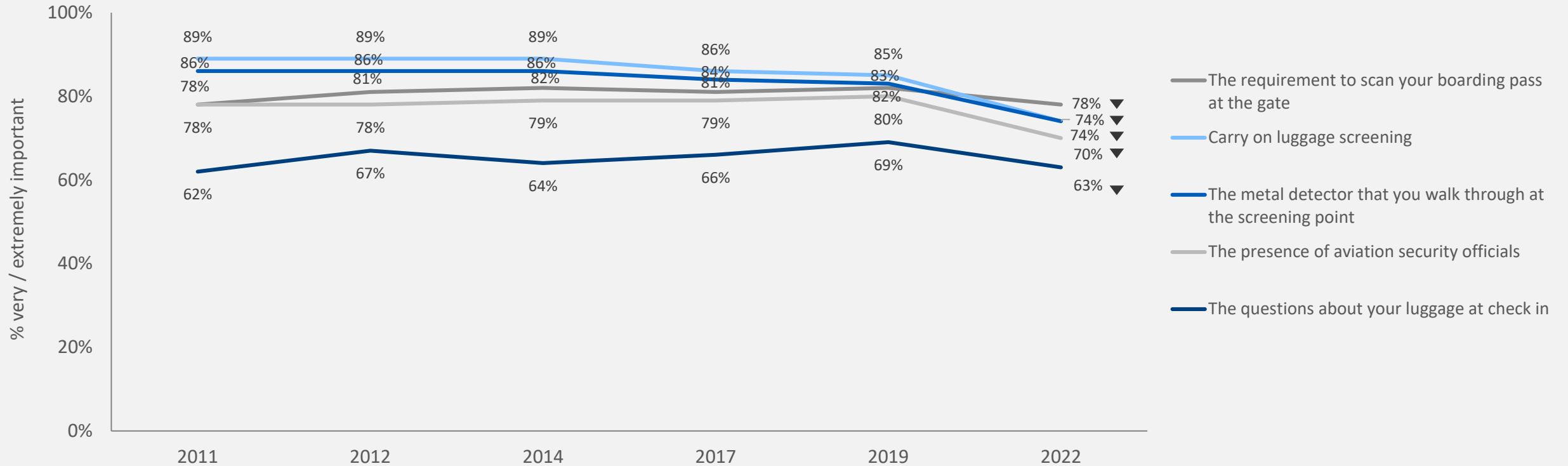
-2 percentage points
to
-5 percentage points

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

Base: All NZ resident travellers (2019 n=1,042), resident travellers who thought Covid precautions at the airport were inadequate (2022 n=74), resident travellers who thought Covid precautions at the airport were adequate (2022 n=742).

When it comes to the importance of individual security aspects, there has been a broad decline across all measures. This is likely driven by passengers now considering other areas to be important in providing them with feelings of safety and security, for example Covid precautions.

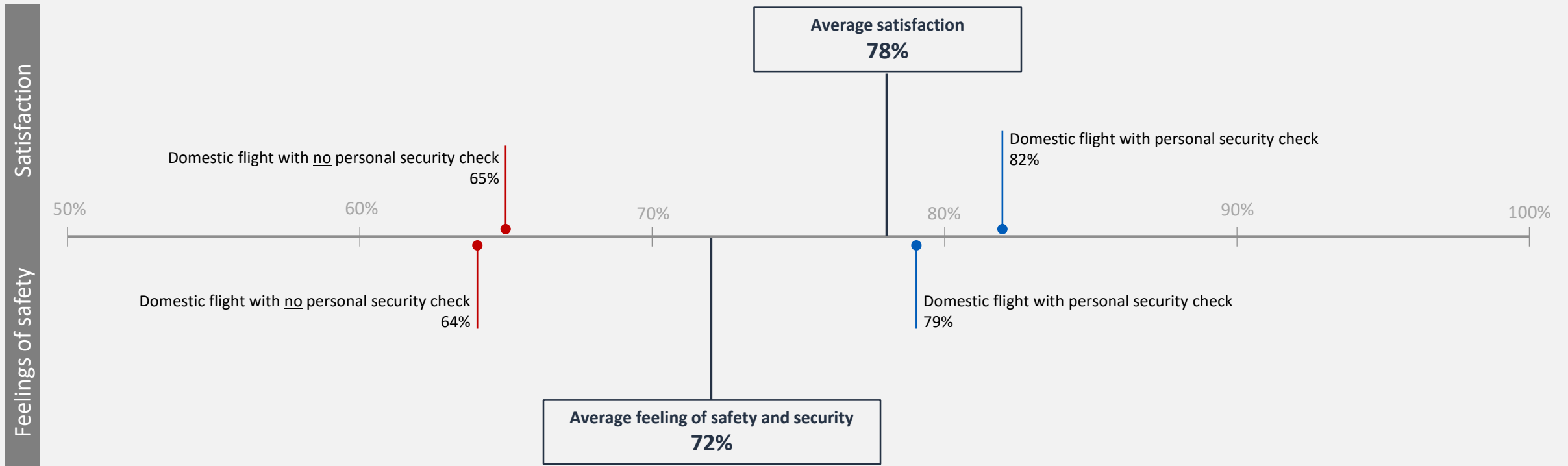
Importance of individual security procedures



Source: Q9a. Please indicate how important or unimportant you think each of these security procedures is in keeping people safe and secure when they fly.
 Base: All NZ resident travellers (2011 n=1,036; 2012 n=1,052, 2014 n=1,229; 2017 n=1,000; 2019 n=1,042; 2022 n=1,001).

While not being responsible for the overall decline, we have again seen that people who aren't screened are less satisfied with procedures than people who are screened.

Satisfaction and feelings of safety and security by screening experience



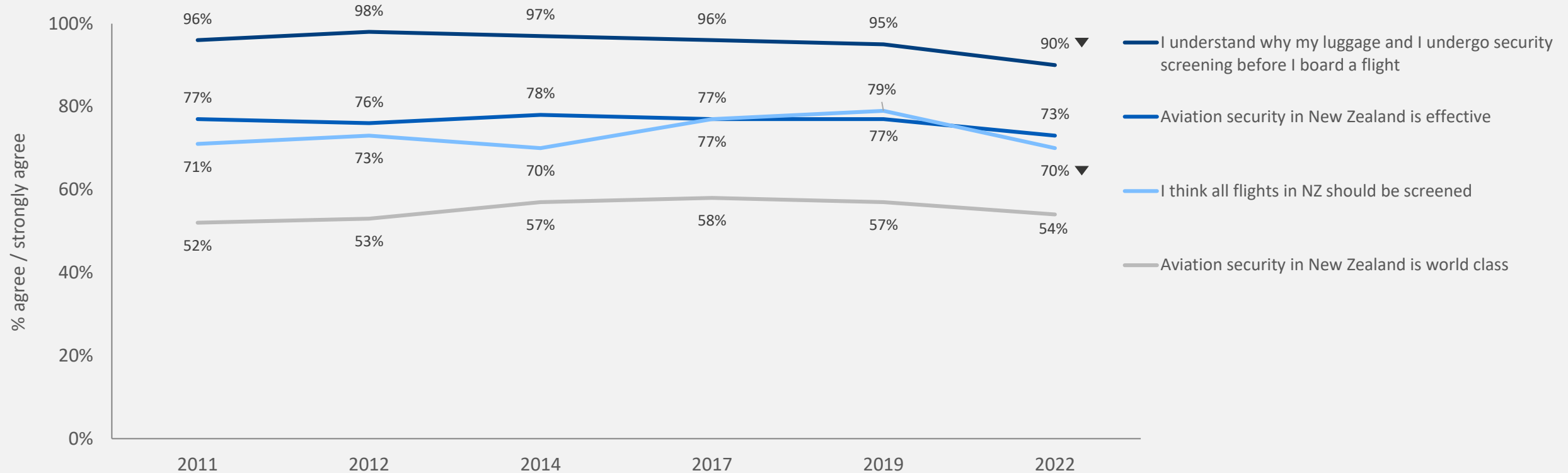
Source: Q5. Thinking only of the security checks at the airport before boarding your flight, and not the airline that you flew, how satisfied were you that the security procedures you undertook were going to keep you safe and secure for the duration of your flight?

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

Base: All NZ resident travellers (2022 n=1,001), International flight (2022 n=259), domestic flight with personal security check (2022 n=458), domestic flight with no personal security check (2022 n=245).

Almost all respondents understand why they have to be screened. Two thirds believe aviation security in New Zealand is effective, and that all New Zealand flights should be screened. Just over half believe New Zealand's aviation security is world class. All areas have declined slightly or significantly since 2019.

Perceptions around security screening

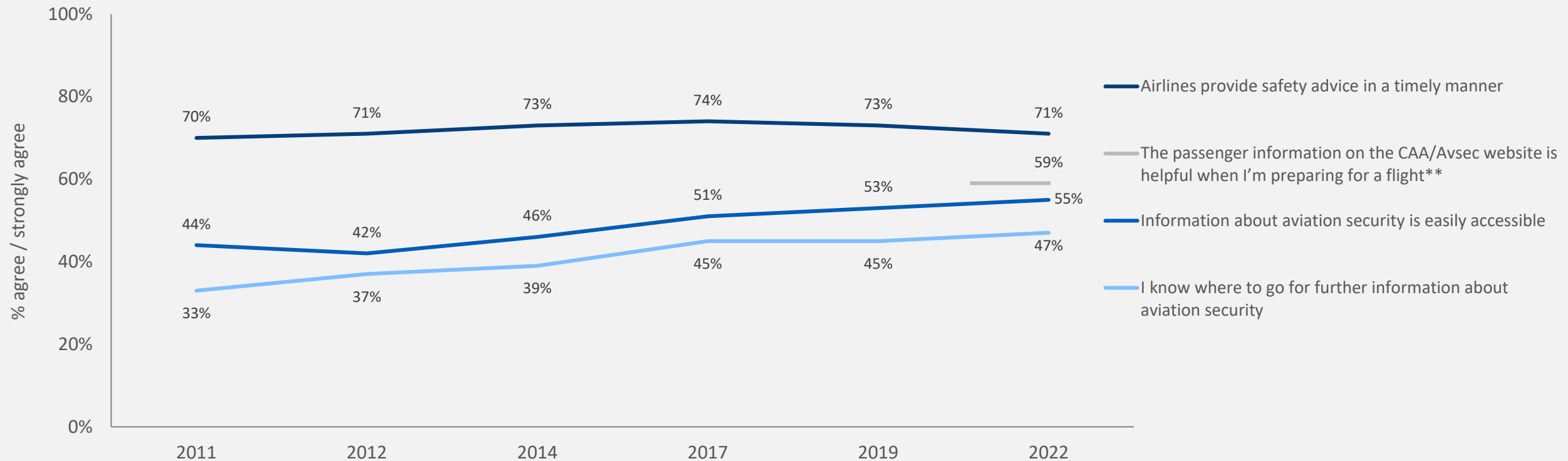


Source: Q9b. Please indicate how much you agree or disagree with each statement.

Base: All NZ resident travellers (2011 n=1,036; 2012 n=1,052; 2014 n=1,229; 2017 n=1,000; 2019 n=1,042; 2022 n=1,001).

Two thirds of travellers feel airlines provide safety information in a timely manner. Half agree the passenger information on the CAA/Avsec website is helpful. The proportion of those who believe information is easily accessible and know where to go to get further information is slowly rising but remains at around half of travellers.

Perceptions about information delivery and accessibility



* Statement asked for the first time in 2022.

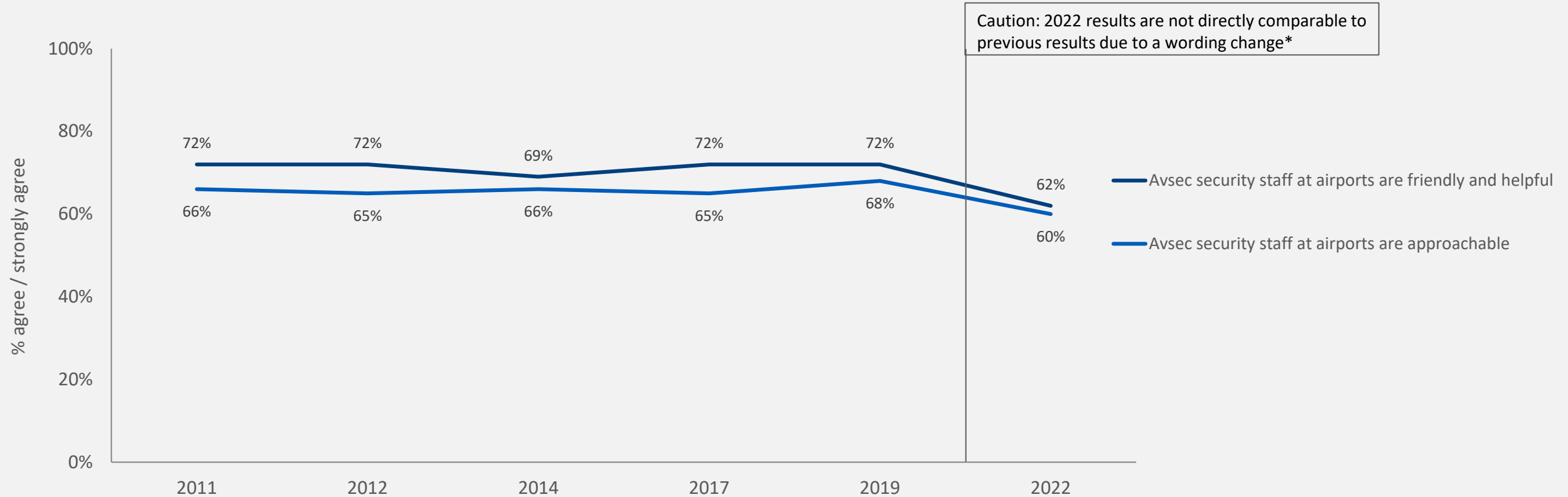
* Don't knows removed from base.

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

Base: All NZ resident travellers (2011 n=1,036; 2012 n=1,052, 2014 n=1,229; 2017 n=1,000; 2019 n=1,042; 2022 n=1,001).

Around two thirds of travellers feel Avsec staff are friendly, helpful and approachable.

Perceptions of AVSEC staff



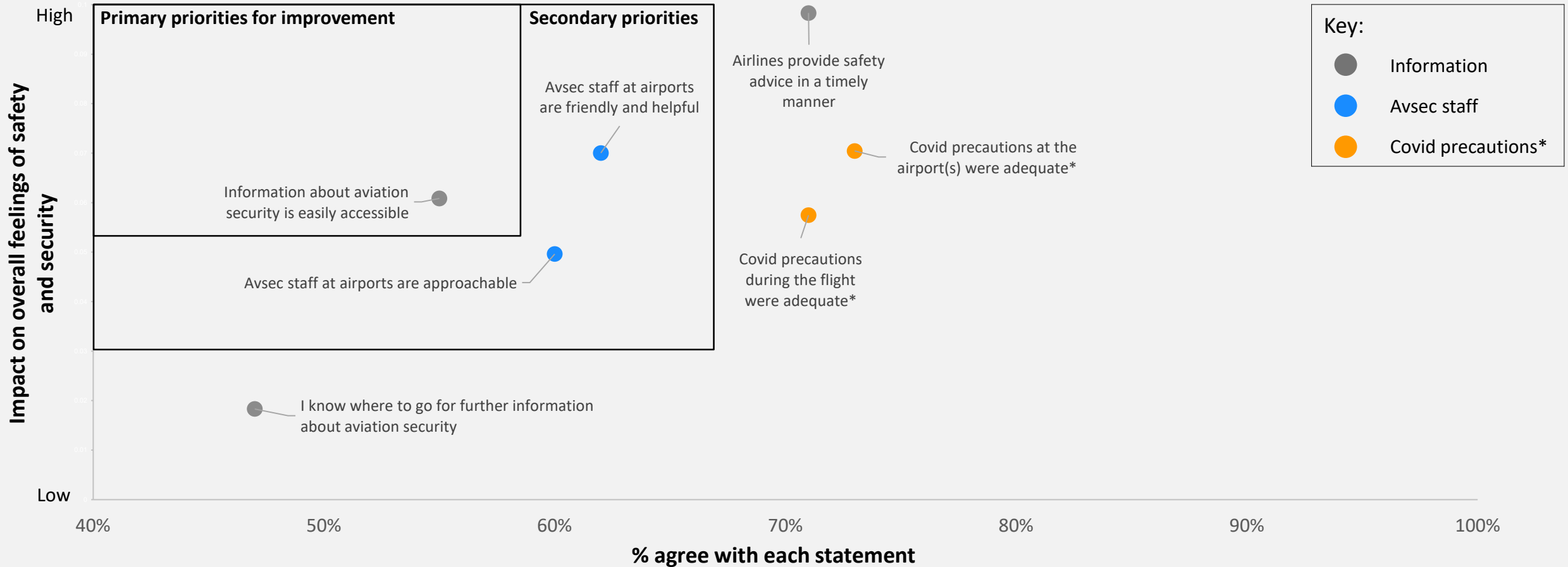
Note: * in 2022 both statements were reworded to specifically include 'Avsec'.

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

Base: All NZ resident travellers (2011 n=1,036; 2012 n=1,052, 2014 n=1,229; 2017 n=1,000; 2019 n=1,042; 2022 n=1,001).

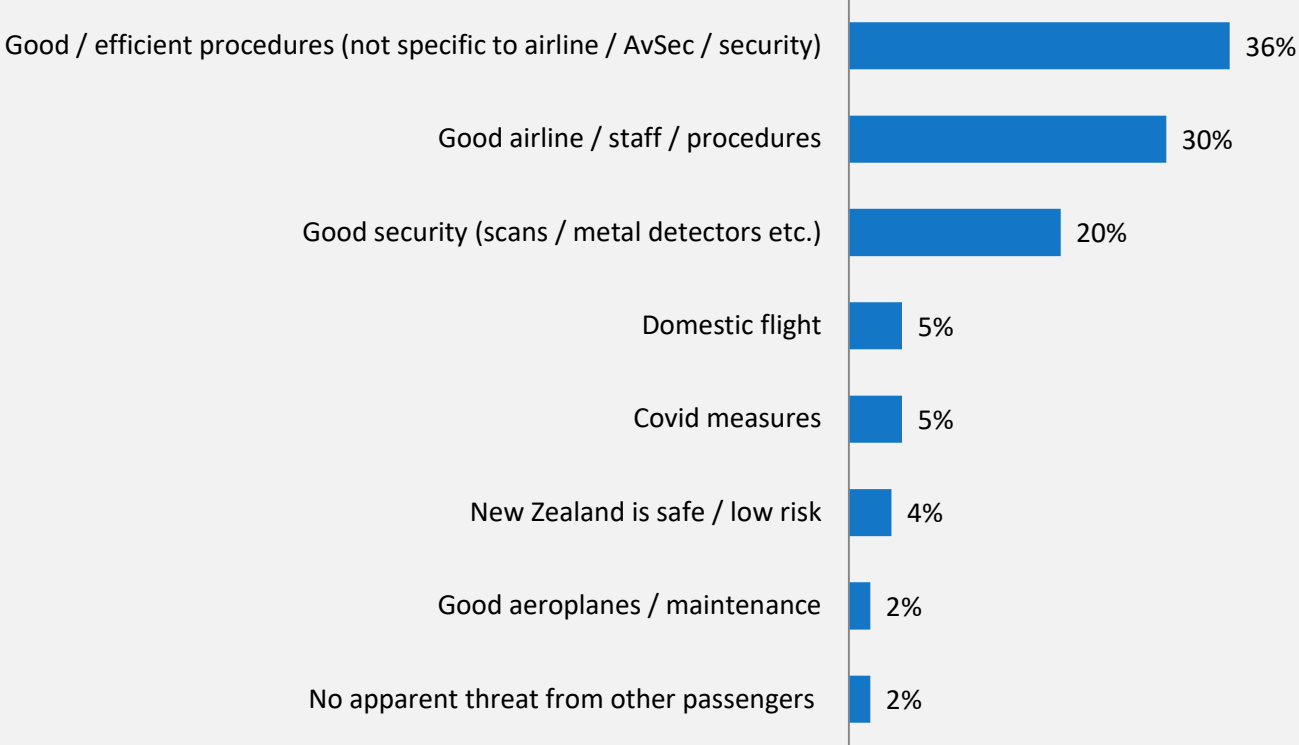
When we look at what drives overall feelings of safety and security, one area stands out as a primary for improvement (an area that is very important to overall feelings of safety and security which is currently underperforming): aviation security information being easily accessible. Secondary areas for improvement (areas that are important to overall feelings of safety and security which are currently performing relatively well but require maintenance) are: Avsec staff being seen to be friendly, helpful, and approachable.

Improving feelings of safety and security



Those who were satisfied with security procedures generally feel the screening processes are efficient and the airlines and Avsec are doing a good job ensuring safety.

Reasons for feeling safe and secure



Source: Q8 - You answered that you felt [...] on your most recent flight. Please explain what specifically about that flight made you feel [...]?
Base: NZ resident travellers who felt extremely or very safe and secure on their most recent flight, excluding don't know (2022 n=751).
Note: Categories less than 2% not shown on chart

Below are a selection of comments which highlight why many respondents felt extremely safe and secure following their most recent screening experience.



*“I think with all the metal detectors and screening you go through these days it would be hard for someone to get a contraband item through.”
(25-34, female, travelled domestically)*

*“It was a main trunk flight so knew everyone else had to go through the security and the scanner like me. If there was something suspicious it would have been picked up going through security.”
(45-54, female, travelled domestically)*

“I didn’t feel like there was anything I needed to worry about... security seemed to be onto it, pulling people and bags out when they were alerted by something.” (35-44, female, travelled internationally)

“Pre-flight boarding checks were in place and there was lots of security in the airport.” (25-34, female, travelled domestically)

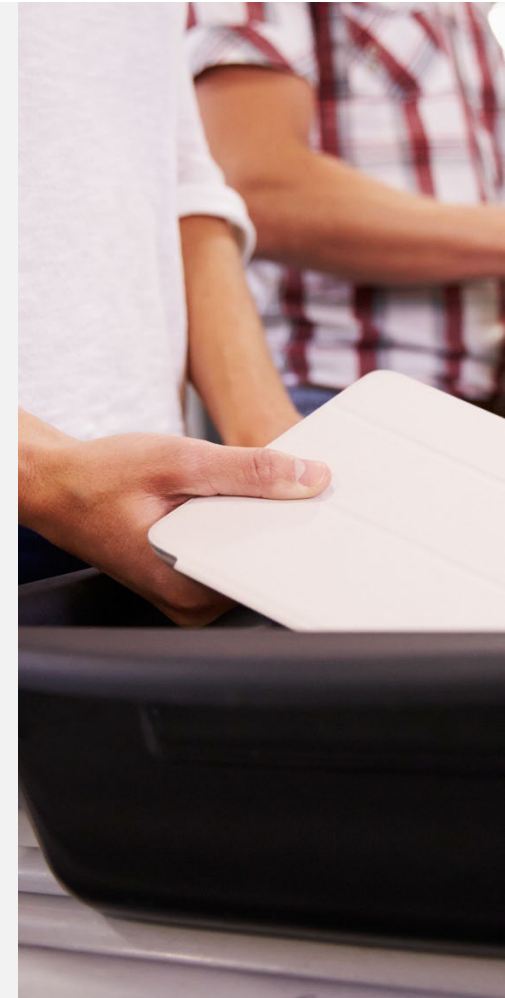
*“The security staff seemed quite pedantic and took their time, which makes me think they wouldn't have missed anything important.”
(55-64, female, travelled internationally)*

“The security checks were sufficient to make me comfortable while not being over the top.” (65 plus, male, travelled domestically)

“Clear communication and thorough screening processes.” (25-34, female, travelled internationally)

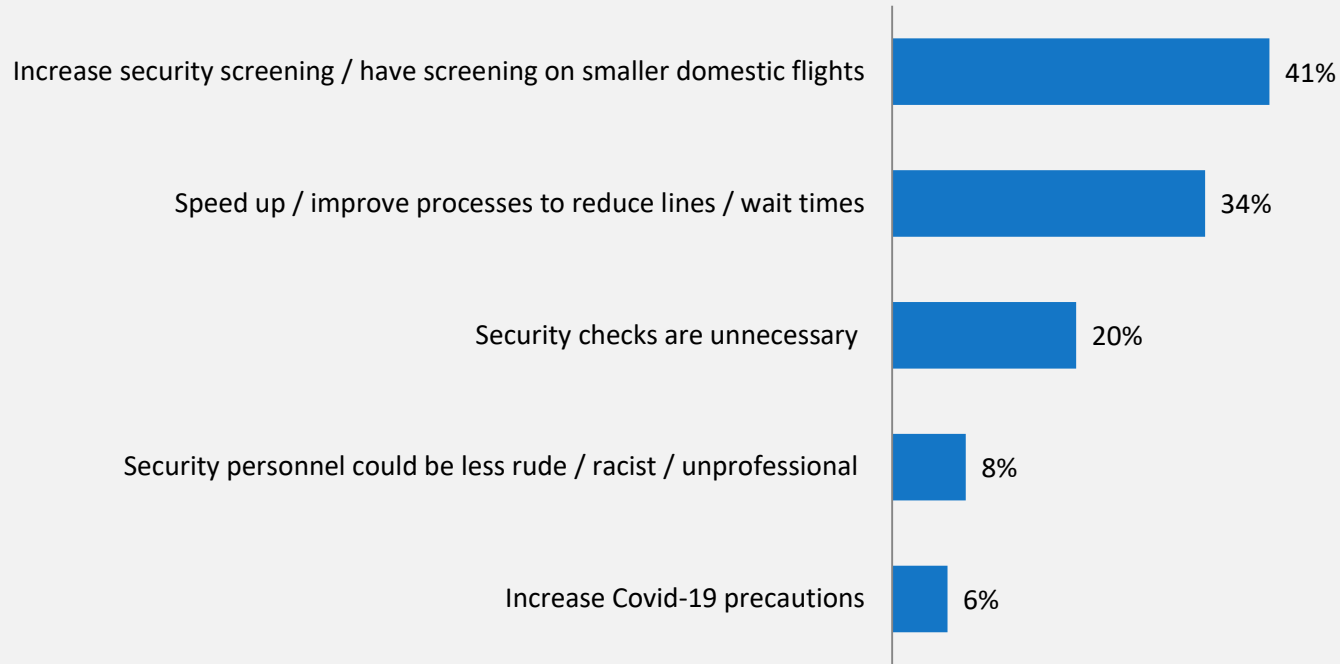
“Knowing my Gaviscon was confiscated that the other passengers potentially had their dangerous goods (toothpaste) removed I felt safe the plane wasn't going to blow up.” (55-64, male, travelled internationally)

“Security checks were thorough and efficient.” (65 plus, female, travelled internationally)



Respondents who were dissatisfied with security procedures tend to attribute their dissatisfaction to two key areas: 1. a lack of screening and/or security, primarily on smaller domestic flights, and 2. processes being too slow and queues too long.

Improving satisfaction with security procedures*



* Caution small base size

Note: Categories less than 2% not shown on chart

Source: Q6 - You answered you were dissatisfied with the security procedures. What could have been done differently to increase your satisfaction with the personal security checks?

Base: NZ resident travelers who were dissatisfied with the security checks on their most recent flight, excluding don't know (2022 n=44).

Below are a selection of comments which highlight why some respondents were unsatisfied with their most recent screening experience.



Lack of screening and/or security

“The number of Lithium batteries, in phones, tablets, laptops that are on the flight. One in a million may malfunction - how would staff handle that in-flight?” *(65 plus, male, travelled domestically, not screened)*

“Security was poor, baggage was lost, baggage handlers didn't seem to know what they were doing.” *(55-64, female, travelled internationally, screened)*

“Not much security at the airport.” *(45-54, male, travelled domestically, screened)*

“You don't pass through anything that makes sure no one is carrying a weapon on them.” *(25-34, female, travelled domestically, not screened)*

“There is zero checks in NZ of any aircraft below 90 seats as this is considered a "reasonable loss" Q300s have 50 seats ATR72s have 68 seats. That's a lot of lives lost if someone blew themselves up.” *(25-34, male, travelled domestically, not screened)*

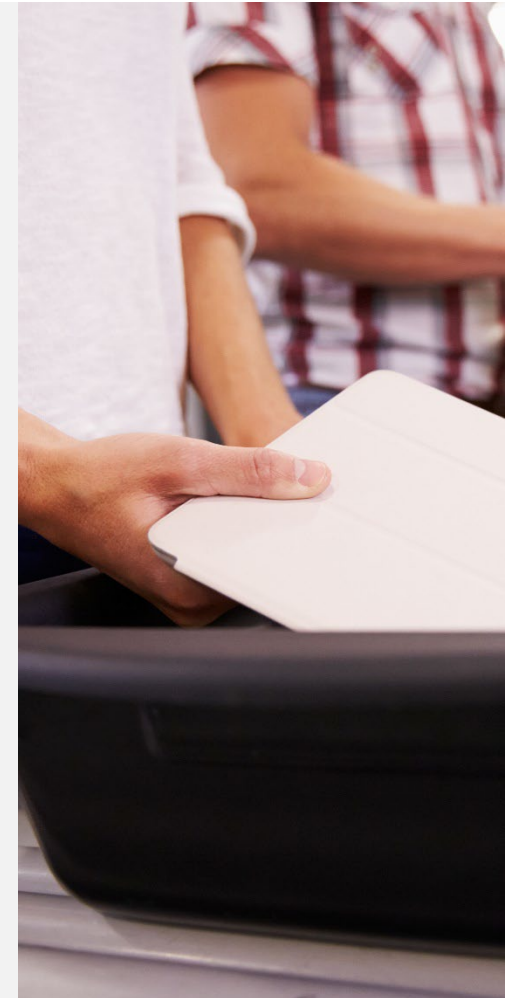
“No scan security.” *(45-54, male, travelled domestically, not screened)*

“Check all the passengers bags - they were busy and let some people go through without and scanning.” *(65 plus, male, travelled domestically, not screened)*

Speed up / improve processes

“Extremely long processing at Auckland Airport, to the point I almost missed my flights, I arrived 45 minute before check in closed and the kind lady in the next aisle let me jump the queue.” *(55-64, female, travelled domestically, screened)*

“Not enough staff to cope with peak travel times.” *(55-64, male, travelled domestically, screened)*



Below are a selection of comments which highlight why some respondents were unsatisfied with their most recent screening experience, continued.



Security checks are unnecessary

“The security checks were excessive compared to the risk, the lines were too long and there were insufficient staff to process passengers leading to unnecessary delays.” *(35-44, male, travelled domestically, screened)*

“Removing shoes, belts, laptops from bags... way too overboard.” *(55-64, male, travelled internationally, screened)*

“They are a waste of time and space creating unnecessary stress, queues, and delays.” *(45-54, male, travelled domestically, screened)*

Security personnel could be less rude / racist / unprofessional

“Queenstown security staff behaviour was poor, they are rude and while I appreciate they are short staffed kindness is key.” *(45-54, female, travelled domestically, screened)*

“I am brown skin I always get taken on the side for explosives testing every time I travel same thing.” *(25-34, male, travelled internationally, screened)*

“The staff need to be friendlier. We didn't have a good experience at Auckland Airport and grumpy security staff didn't help. They can still be professional but they need to lighten up a bit. A smile and a nice word goes a long way.” *(65 plus, female, travelled domestically, screened)*

Fears around Covid

“It was a 50 minute flight and drinks and nibbles were served which required the removal of masks which at the time was foolish and unnecessary.” *(65 plus, female, travelled domestically, screened)*

“The current queues at Auckland are a health hazard. The number of unmasked people and also proximity to poorly masked people make travelling through Auckland Domestic the most dangerous activity I have done this year.” *(65 or over, male, travelled domestically, screened)*



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The impact of Covid on
travel and passengers

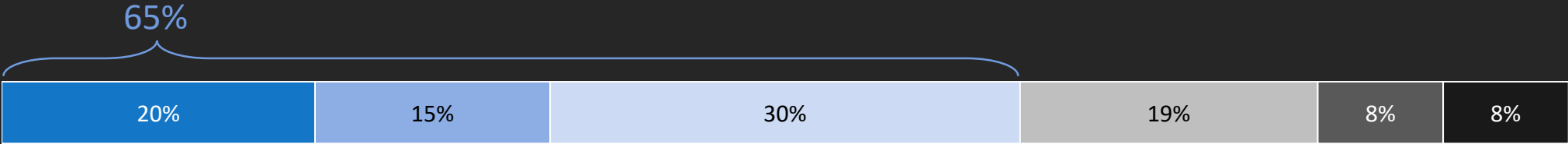
A third of New Zealand resident travellers feel that Covid will continue to impact their travel decisions over the next couple of years, but most believe it's likely the amount of travel they do will be back to pre-pandemic levels before the end of 2023.

The continued impact of Covid on travel



38% of respondents feel that over the next couple of years Covid will continue to impact their travel decisions.

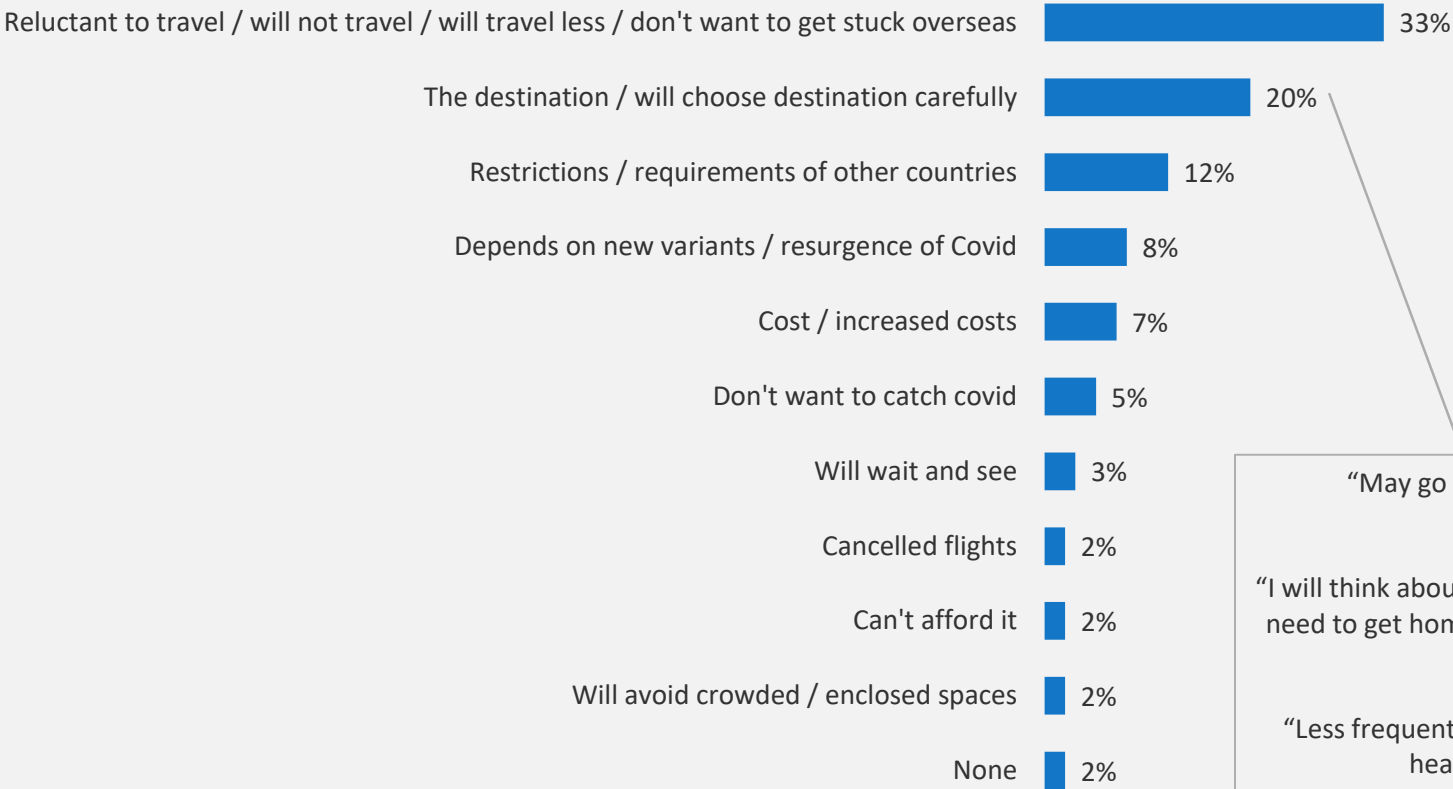
Two thirds feel that before the end of 2023 it's likely the amount of air travel they do will be back to pre-pandemic levels.



Legend: Already flying at least as much as pre-pandemic Late 2022 2023 2024 or later Won't ever fly as much as pre-pandemic Don't know

Source: COV4. Over the next couple of years do you think COVID will impact your travel decisions? For example, where you go, how you choose to get there, and how often you go? COV6. When do you think the amount of air travel you do will get back to what it was before the pandemic?
Base: NZ resident travellers, (2022 n=1001).

Those who feel Covid will continue to impact their travel decisions over the next couple of years tend to say: 1. they are simply reluctant to travel because of Covid, and 2. they are likely to be more selective in their destination choices.



“I’m only flying if I really need to, Covid will continue to be rife and airports internationally have zero social distancing so I avoid them.”
(35-44, male, travelled internationally)

“I am very unlikely to want to travel. It can impact flights, bookings with agencies i.e. accommodation. Countries you are in could go into lock down and you may get stuck there... and so on.”
(35-44, female, travelled domestically)

“I am reluctant to fly with my yet-to-be vaccinated child - she is too young for vaccination and has respiratory issues.”
(35-44, female, travelled domestically)

“May go to less crowded places or cities - opting for open space, countryside, etc.”
(35-44, male, travelled internationally)

“I will think about the places I go, and will definitely plan my trip with the possibility that we could need to get home in a hurry. I will also make sure we have comprehensive travel insurance etc.”
(45-54, Female, Travelled internationally)

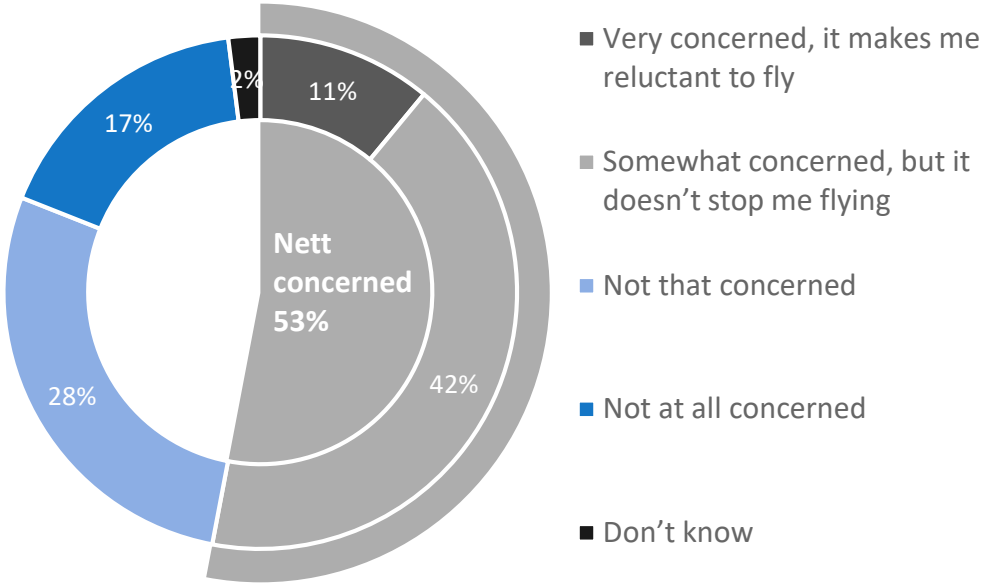
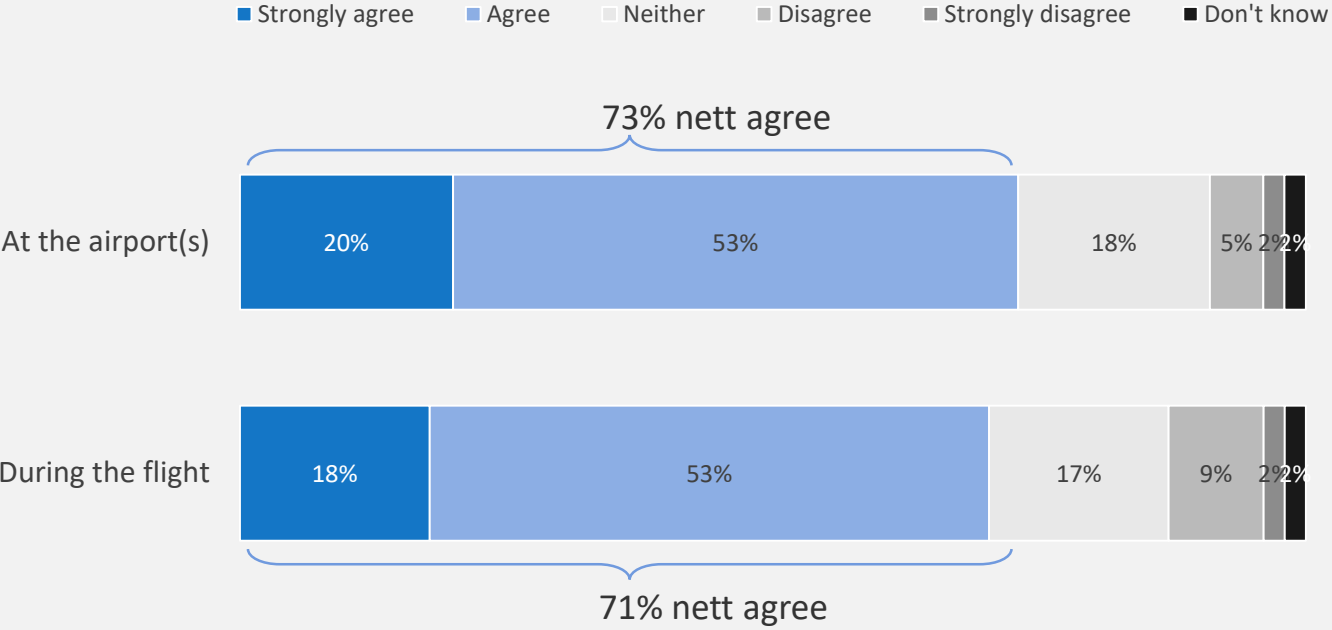
“Less frequent travel while the pandemic is still quite prevalent. Avoiding countries with poor health systems, or those like Hong Kong where you have to isolate still.”
(55-64, Male, Travelled internationally)

Categories less than 2% not shown in chart.
 Source: COV5. How do you think COVID will impact your travel decisions over the next couple of years?
 Base: NZ resident travellers who feel Covid will continue to impact their travel decisions over the next couple of years, excluding don't know (2022 n=281).

Three quarters of New Zealand travellers agree that the precautions they experienced, at the airport and during their most recent flight, were adequate*. However, more than half of continue to be concerned about catching Covid while flying.

Adequacy of Covid precautions*

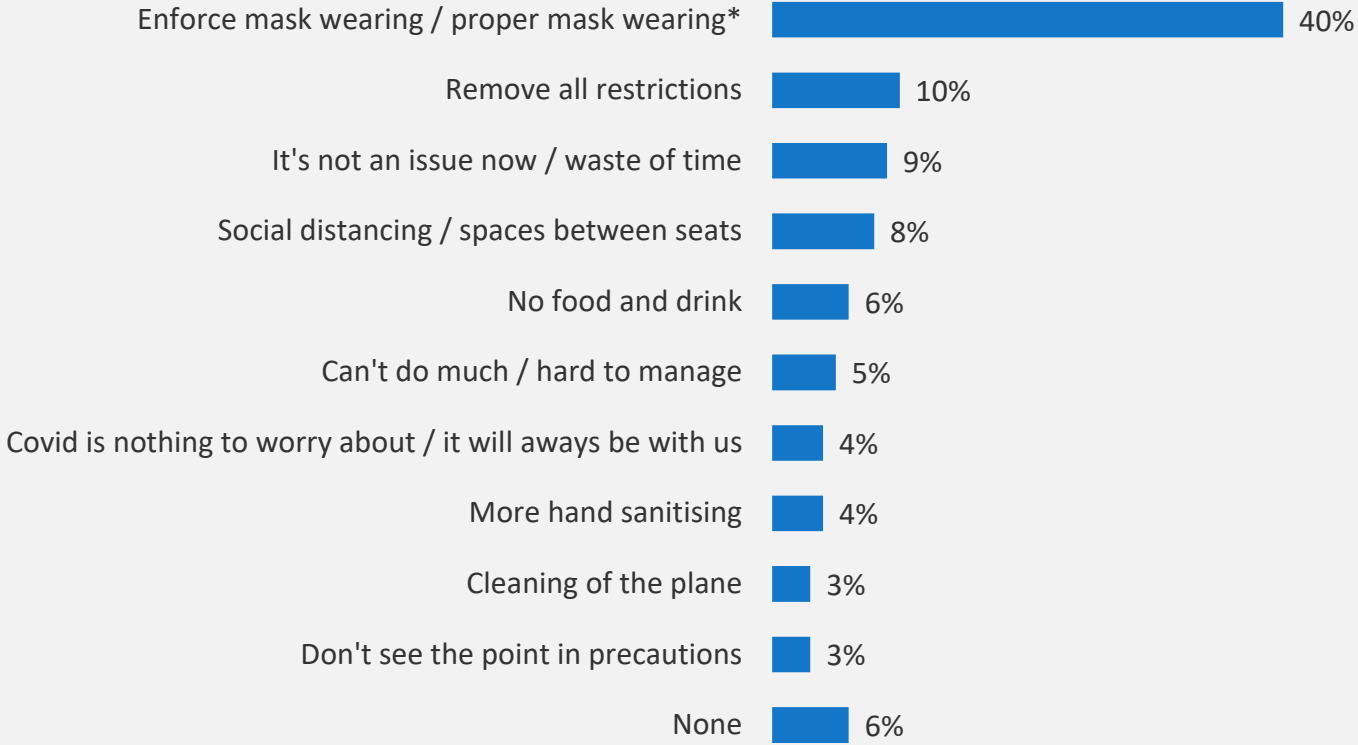
Concerns around Covid and flying



*Note: fieldwork was carried out from 9 to 26 September 2022. On 13 September the New Zealand government removed almost all Covid rules and precautions. Most survey respondents based their travel experiences on flights taken prior to the removal of the restrictions. However, some respondents did travel and complete the survey after the restrictions were removed and as such had a different experience to those who completed the survey earlier.
 Source: COV1. Once again thinking about your most recent flight, do you think the precautions to keep you safe from COVID were adequate ... COV3. And generally, how concerned are you about catching COVID when you fly?
 Base: NZ resident travellers (2022 n=1001).

When asked what could be done, to improve Covid precautions, the most common response was to improve mask wearing adherence*.

Improving Covid precautions



“All flights continue mask mandate, every person I know who has taken an international flight in the last 4 months came back with COVID, ALL were traced back to them being in a flying tin can.”
(18-24, female, travelled domestically)

“Mask wearing in departure lounge. Better spacing. More hand sanitisers around, spray planes between flights. Thanking people for wearing masks.”
(65 plus, male, travelled domestically)

“When I flew masks were required. They should have been retained. If I fly again soon, I will put one on, as I do on all public transport still.”
(65 plus, female, travelled domestically)

*Note: most respondents flew before the the New Zealand government removed almost all Covid rules and precautions and at that time face marks were still mandatory while flying.
 Categories less than 3% not shown in chart.
 Source: COV2. How do you think the precautions to keep you safe from COVID could be improved?
 Base: NZ resident travellers who felt Covid precautions at the airport or onboard were inadequate, excluding don't know (2022 n=167).

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Knowledge around aviation
safety and security

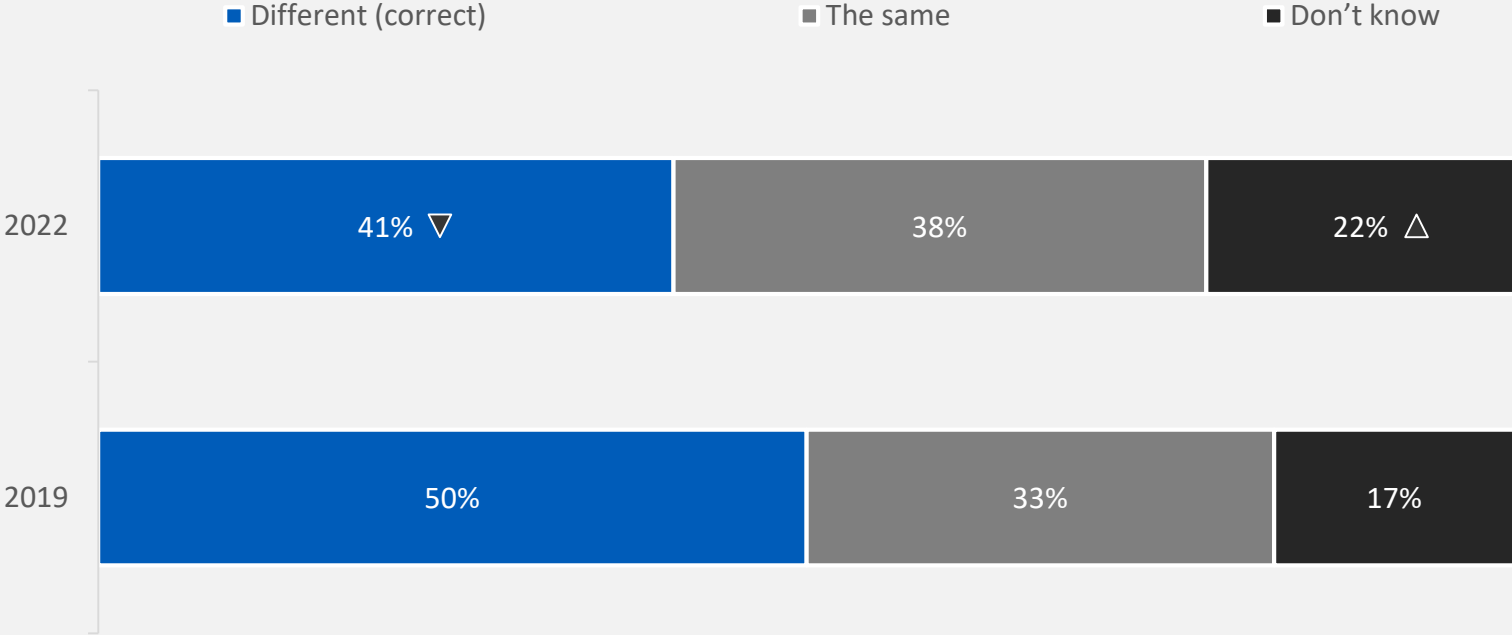


Aviation Security Service

Kaiwhakamaru Rererangi

This year fewer New Zealand travellers know the rules, for what can or cannot be packed in carry on and checked luggage, are different for domestic and international flights. The rest either believe the rules are the same, or don't know.

Knowledge of rule differences



Source: Q25 - Are the New Zealand restrictions on items in luggage the same or different for domestic and international flights?
Base: All NZ resident travellers (2019 n=1,042; 2022 n=1,001).

When it comes to specific rules, confusion most commonly arises when there are differing rules between carry on and checked, and domestic and international.

Knowledge of specific rules

		Domestic flights						International flights								
		Carry on			Checked in			Carry on			Checked in					
		Okay	Not okay	Don't know	Okay	Not okay	Don't know	Okay	Not okay	Don't know	Okay	Not okay	Don't know			
AirPods / Earbuds	✓	93%	3%	4%	✓	88%	8%	4%	✓	88%	5%	7%	✓	81%	10%	9%
Laptop (x1)	✓	95%	3%	2%	✓	74%	21%	5%	✓	89%	5%	7%	✓	69%	20%	10%
Perfume (75ml)	✓	70%	19%	11%	✓	82%	10%	7%	✓	74%	16%	10%	✓	72%	19%	9%
Prescription medicine	✓	92%	4%	4%	✓	91%	6%	3%	✓	90%	6%	3%	✓	91%	3%	6%
Toothpaste (80ml)	✓	84%	9%	7%	✓	86%	8%	5%	✓	81%	11%	8%	✓	84%	8%	8%
Bottle of water (250ml)	✓	73%	20%	7%	✓	71%	19%	10%	✗	33%	59%	8%	✓	54%	37%	9%
Butter (500g)	✓	55%	28%	17%	✓	60%	24%	15%	✗	27%	53%	20%	✓	40%	43%	17%
Can of Coke (330ml)	✓	56%	36%	8%	✓	54%	36%	10%	✗	22%	72%	6%	✓	45%	45%	9%
Gin (750ml) in a Security Tamper Evidence bag	✓	56%	27%	16%	✓	67%	21%	12%	✗	53%	31%	16%	✓	59%	28%	12%
Manuka Honey (500g)	✓	60%	24%	16%	✓	74%	15%	11%	✗	22%	61%	17%	✓	55%	35%	11%
Perfume (125ml)	✓	48%	40%	12%	✓	73%	20%	7%	✗	21%	70%	9%	✓	61%	32%	7%
Snow Globes	✓	30%	31%	39%	✓	42%	27%	32%	✗	22%	40%	38%	✓	40%	31%	28%
Talcum Powder (400ml)	✓	37%	35%	28%	✓	61%	21%	18%	✗	24%	52%	25%	✓	52%	32%	16%
e-cigarette / Vape (x1)	✓	30%	49%	21%	✗	39%	41%	20%	✓	23%	56%	21%	✗	34%	47%	19%
Lighter (x1)	✓	17%	72%	11%	✗	28%	60%	13%	✓	20%	68%	12%	✗	30%	58%	12%
Loose batteries (e.g., AA, AAA, or 9v)	✓	29%	53%	18%	✗	38%	49%	14%	✓	27%	57%	16%	✗	30%	58%	12%
Power Bank (x1) (a portable battery)	✓	52%	35%	13%	✗	42%	47%	11%	✓	43%	38%	20%	✗	39%	45%	16%
90Wh power tool battery (18 volt, 5.0Ah battery)	✓	13%	68%	19%	✗	24%	54%	22%	✓	22%	63%	15%	✗	25%	60%	15%
Power Drill	✗	10%	79%	11%	✓	38%	46%	15%	✗	6%	82%	12%	✓	39%	47%	14%
Scissors with 10cm blade	✗	7%	87%	6%	✓	53%	41%	6%	✗	7%	85%	8%	✓	44%	47%	9%
Swiss Army Knife with 7cm blade	✗	6%	86%	8%	✓	50%	41%	8%	✗	3%	91%	7%	✓	44%	48%	7%
Fire-works	✗	1%	97%	2%	✗	4%	91%	5%	✗	7%	88%	5%	✗	4%	87%	9%
LPG Bottle	✗	4%	90%	6%	✗	5%	87%	7%	✗	7%	88%	5%	✗	10%	82%	8%

- ✓ Allowed in that type of bag
- ✗ Not allowed in that type of bag
- Particularly low awareness

Source: Q24. Imagine you were about to go on [insert a domestic flight within/ insert an international flight from] New Zealand. Q24a. Imagining again that you were about to go on [insert a domestic flight within/ insert an international flight from] New Zealand. Which of these items are okay to take in your checked-in bags and which are not okay?
 Base: NZ resident travellers who answered about domestic flights (2019 n=538; 2022 n≈120), NZ resident travellers who answered about international flights (2019 n=504; 2022 n≈400).

KANTAR PUBLIC

Perceptions of aviation
safety and security - based
on all aspects of CAA's
responsibilities

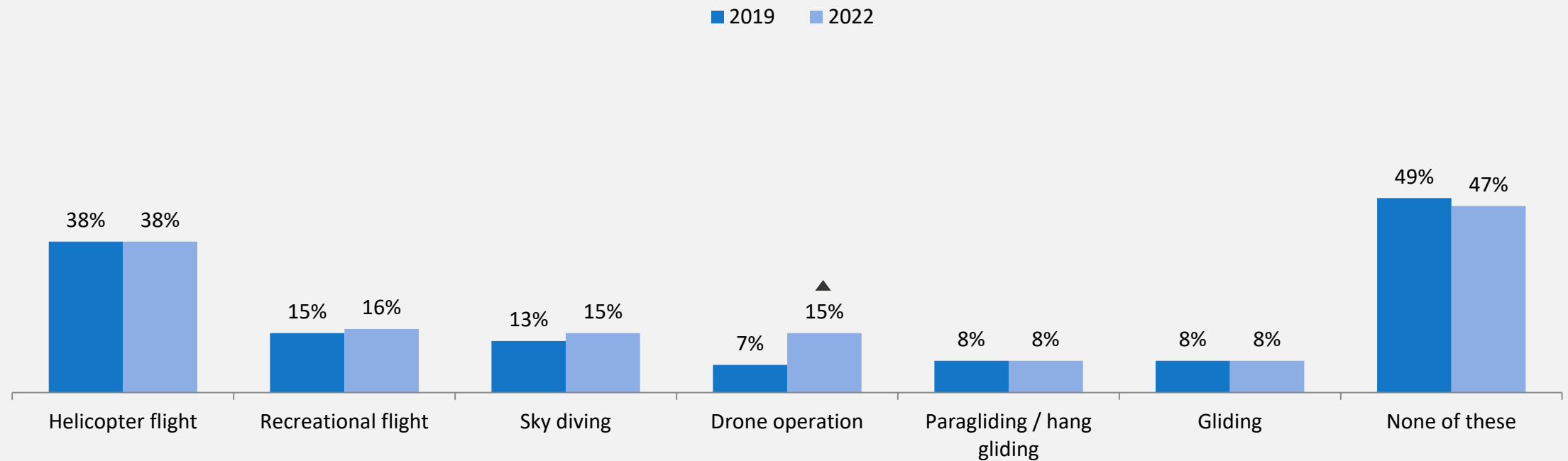


Aviation Security Service

Kaiwhakamaru Rererangi

Half of New Zealand resident travellers have also done one or more other CAA monitored activities. Helicopter flights tend to be the most common. Drone usage is the only activity to have seen significant uptake since 2019.

Uptake of other CAA monitored activities

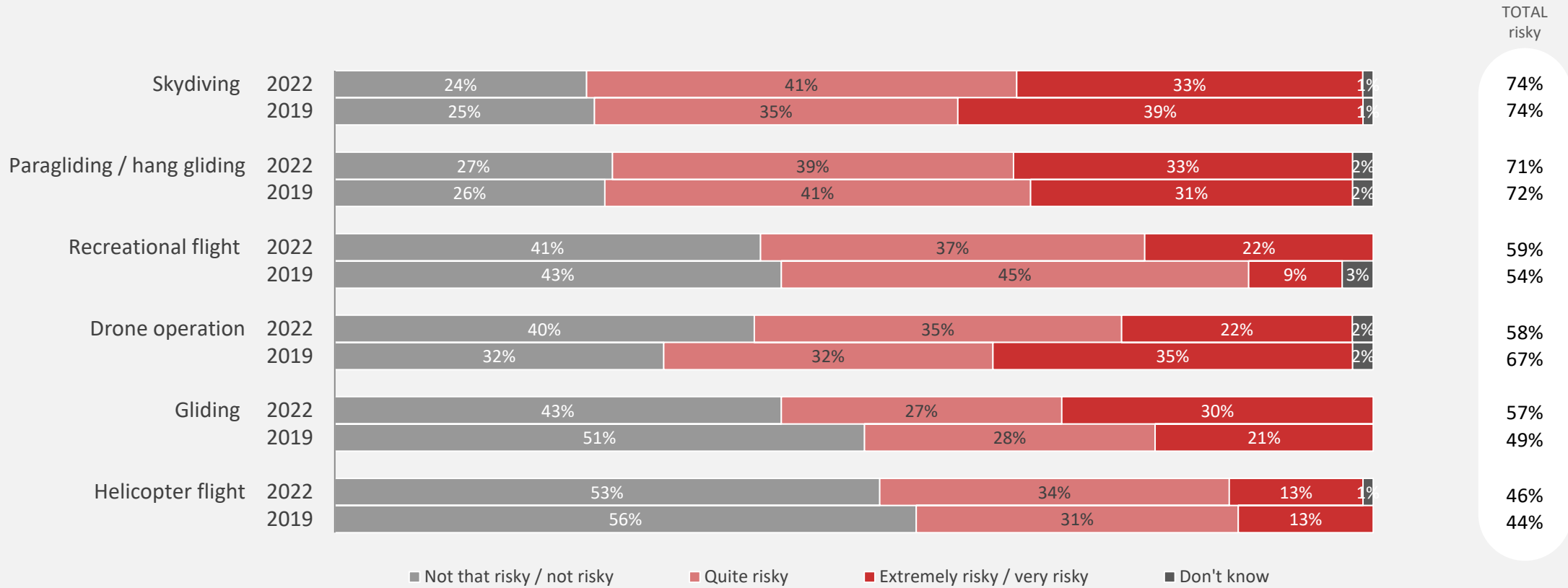


Source: Q11. The Civil Aviation Authority has responsibility for all aviation activities. The most well-recognised is aviation security at NZ airports. However, there are other aviation activities it is also responsible for. The table below lists some of the aviation activities that CAA is responsible for. Have you ever undertaken any of the following activities in New Zealand?

Base: All NZ resident travellers (2011 n=1,036; 2012 n=1,052, 2014 n=1,229; 2017 n=1,000; 2019 n=1,042; 2022 n=1,001).

Of the different CAA monitored activities, skydiving and paragliding / hang gliding are perceived, by participants, to be the most risky.

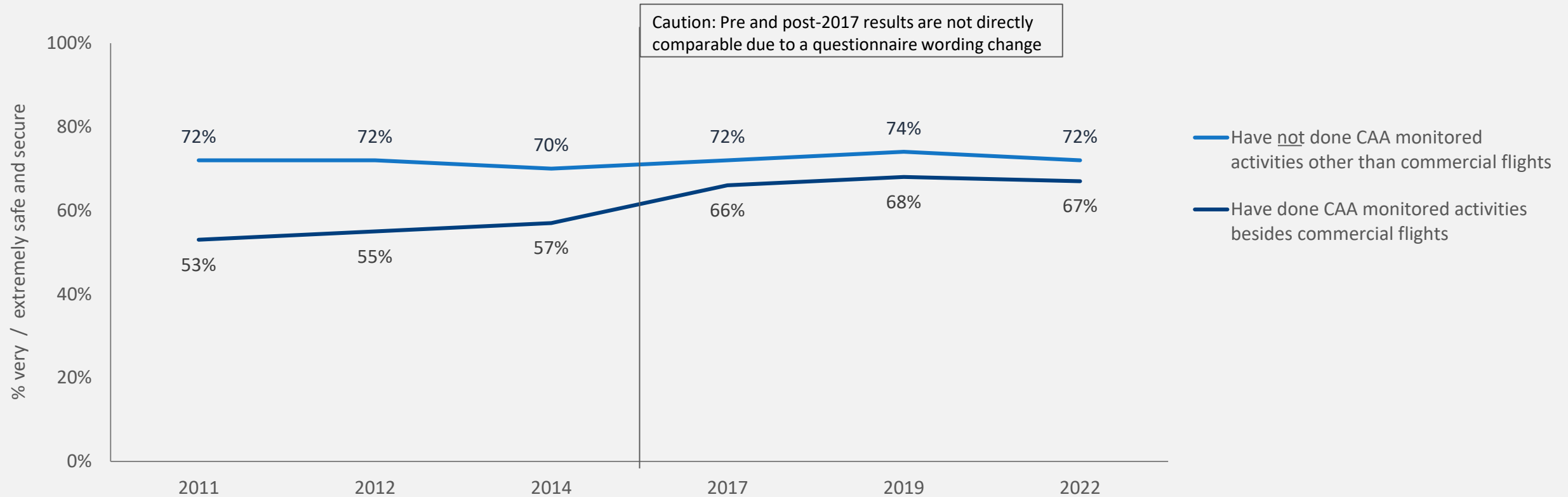
Risk perceptions (among those who have done each activity)



Source: Q13. Please indicate how risky you think each of these activities is to the personal safety of the people that undertake them
 Base: Those who have undertaken skydiving (2019 n=134; 2022 n=141), paragliding / hang gliding (2019 n=79; 2022=77), recreational flight (2019 n=157; 2022 n=150), drone operation (2019 n=73; 2022 n=130), gliding (2019 n=86; 2022 n=80), helicopter flight (2019 n=157; 2022 n=150).

When factoring in the additional CAA monitored activities mentioned on the previous slide, feelings of safety and security dip among those who have participated in at least one of these activities.

Feelings of safety and security

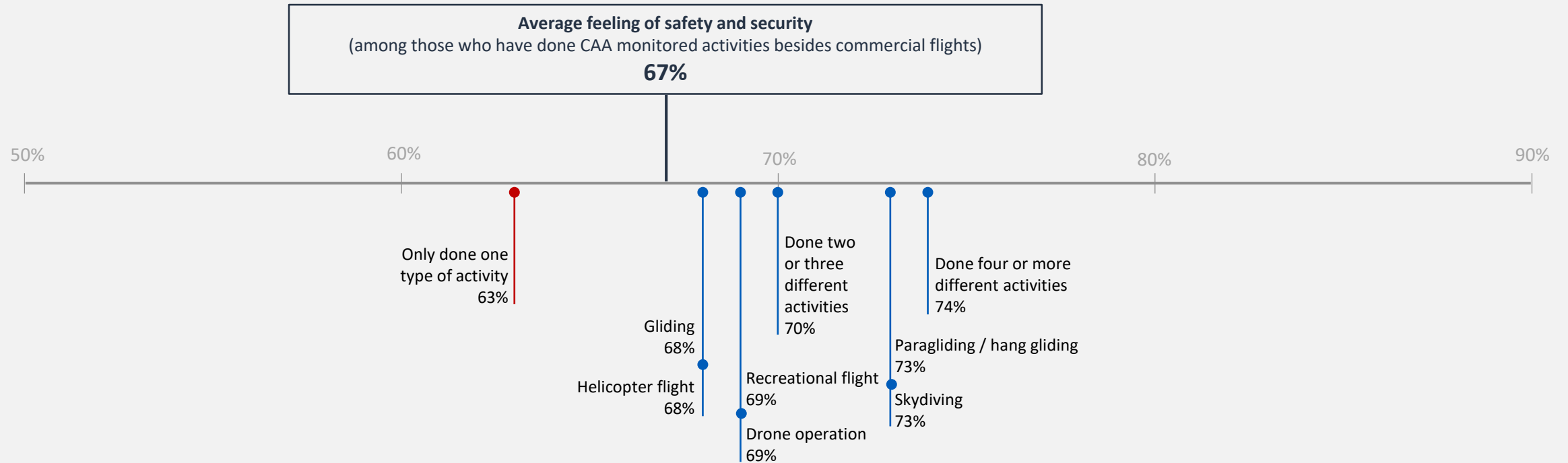


Source: Q12. Thinking about all aspects of aviation safety and security in New Zealand, overall how safe and secure do you feel when you fly (or undertake one of the activities in the last question)?

Base: NZ resident travellers who have not done CAA monitored activities other than commercial flights (2011 n=749; 2012 n=739, 2014 n=842; 2017 n=526; 2019 n=504; 2022 n=472), NZ resident travellers who have done CAA monitored activities besides commercial flights (2011 n=287; 2012 n=313, 2014 n=387; 2017 n=474; 2019 n=538; 2022 n=529).

These lower feelings of safety and security are primarily driven those who have undertaken just one of the listed activities. Those who have done multiple activities tend to have higher confidence in the safety and security of these activities.

Feelings of safety and security



Source: 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]?

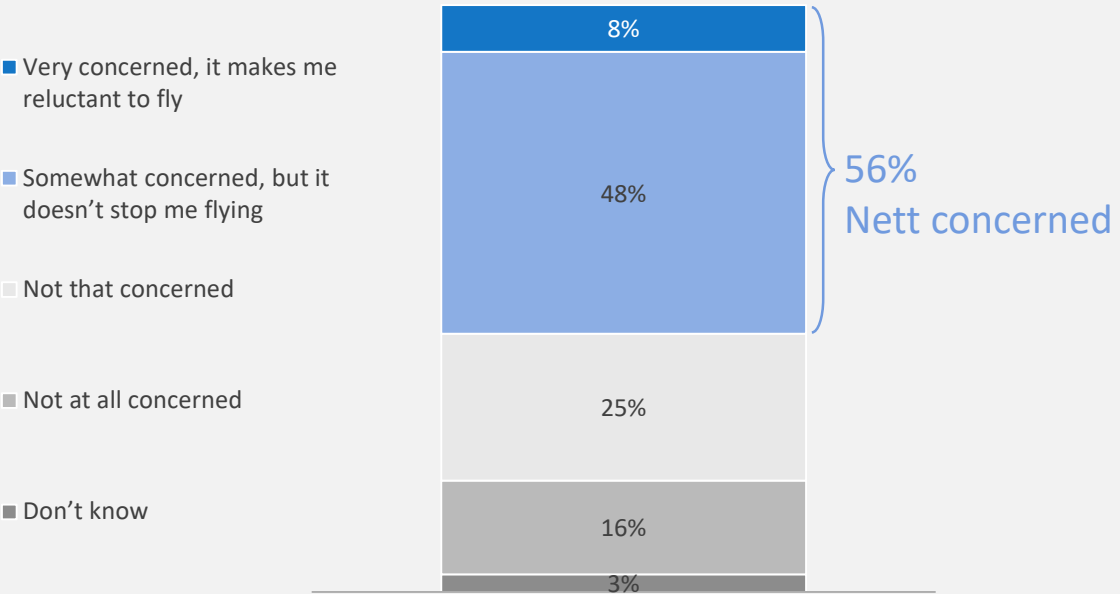
Base: NZ resident travellers who have done CAA monitored activities besides commercial flights (2022 n=529), recreational flight (2022 n=150), operating a drone (2022 n=130), gliding (2022 n=80), flying in a helicopter (n=386), paragliding / hang gliding (n=77), skydiving (n=141), one activity (n=284), two to three activities (n=197), four or more activities (n=245).

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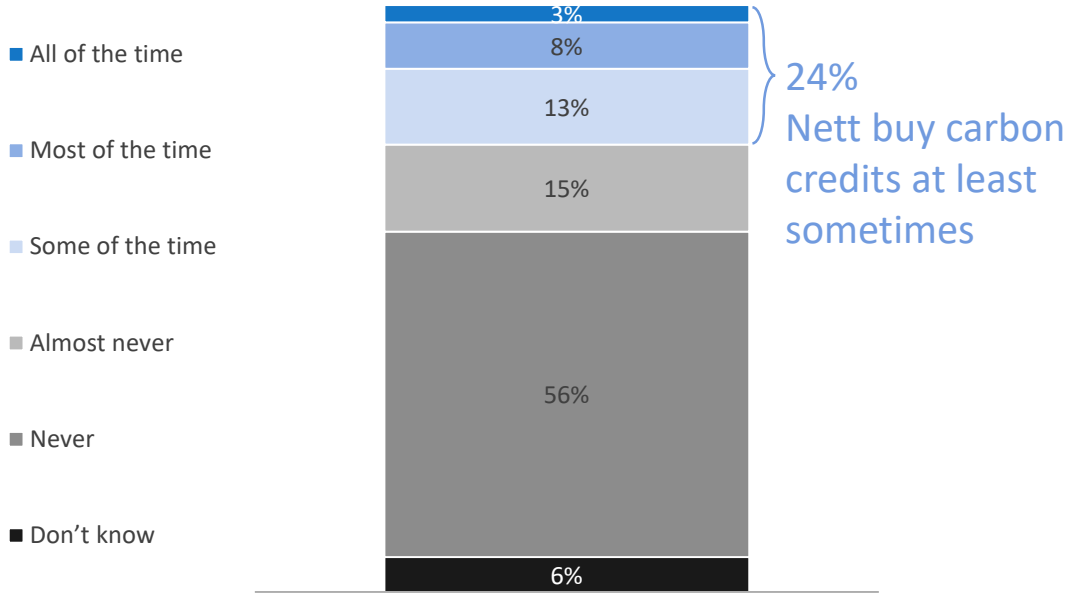
Environmental concerns

More than half of travellers are concerned about the impact flying has on the environment. However, just a quarter say they buy carbon credits regularly (at least some of the time).

Concerns around the environmental impact of flying



Frequency of carbon credit purchasing



Source: CAR1. How concerned are you about the environmental impact of the flights you take? CAR2. How often, if at all, do you buy carbon credits with your flights (to offset the environmental impact of your flights)?
 Base: NZ resident travellers, (2022 n=1001).

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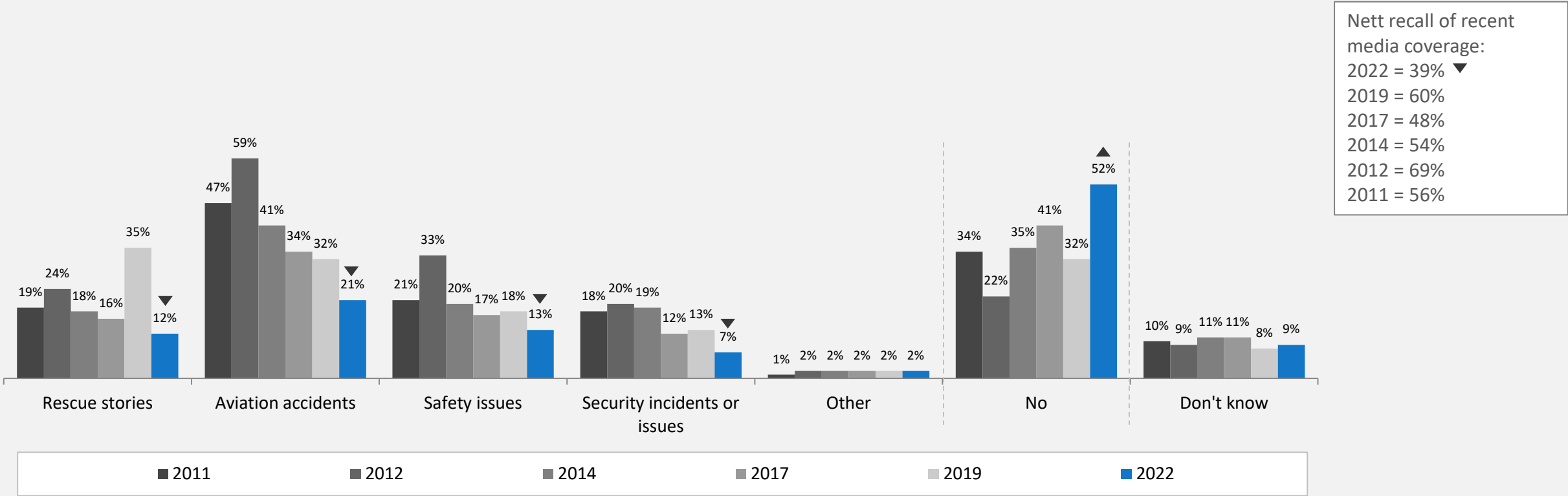
Media coverage



Aviation Security Service
Kaiwhakamaru Rererangi

Media coverage of civil aviation safety and security is particularly low this year. Just over a third of New Zealand domestic travellers recall having seen, read or heard about civil aviation in the media recently.

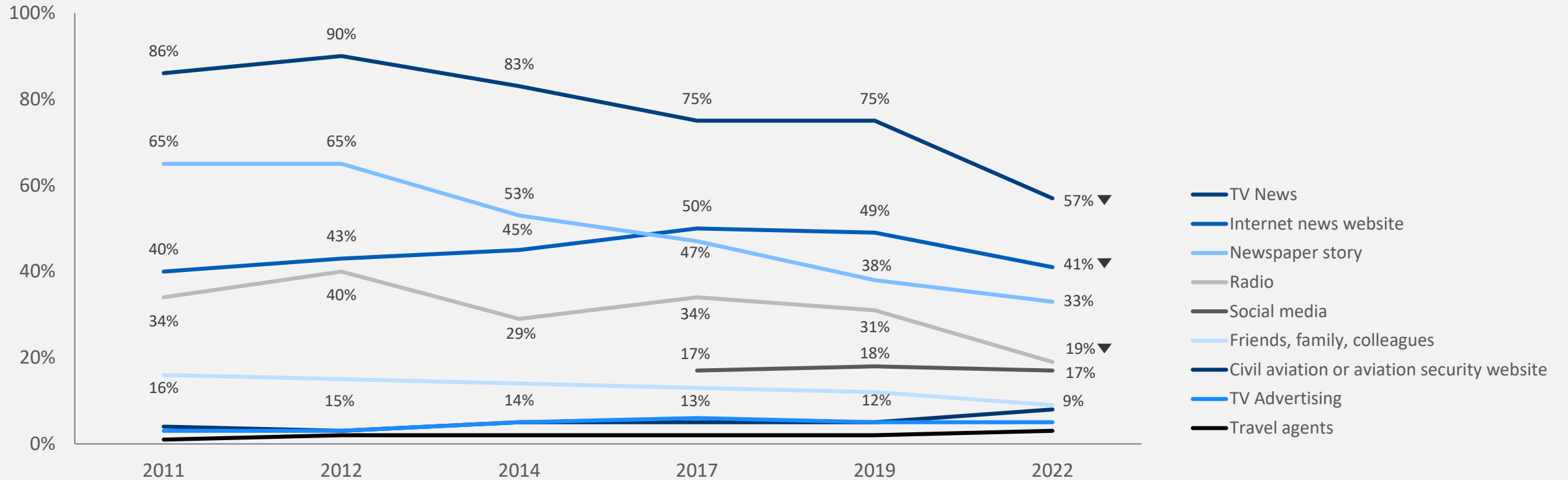
Recall of recent media coverage of civil aviation safety and security



Q14. Have you seen, read or heard anything recently about civil aviation safety and security in New Zealand – rescue stories, issues or accidents?
 Base: All NZ resident travellers (2011 n=1,036; 2012 n=1,052; 2014 n=1,229; 2017 n=1,000; 2019 n=1,042; 2022 n=1,001)

Recall across all sources of information is also down this year. News (TV, internet, and print) continue to be the most commonly recalled source of information.

Source of information about civil aviation and security in New Zealand



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

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; 2017 n=480; 2019 n=631; 2022 n=391).



International Traveller Survey results

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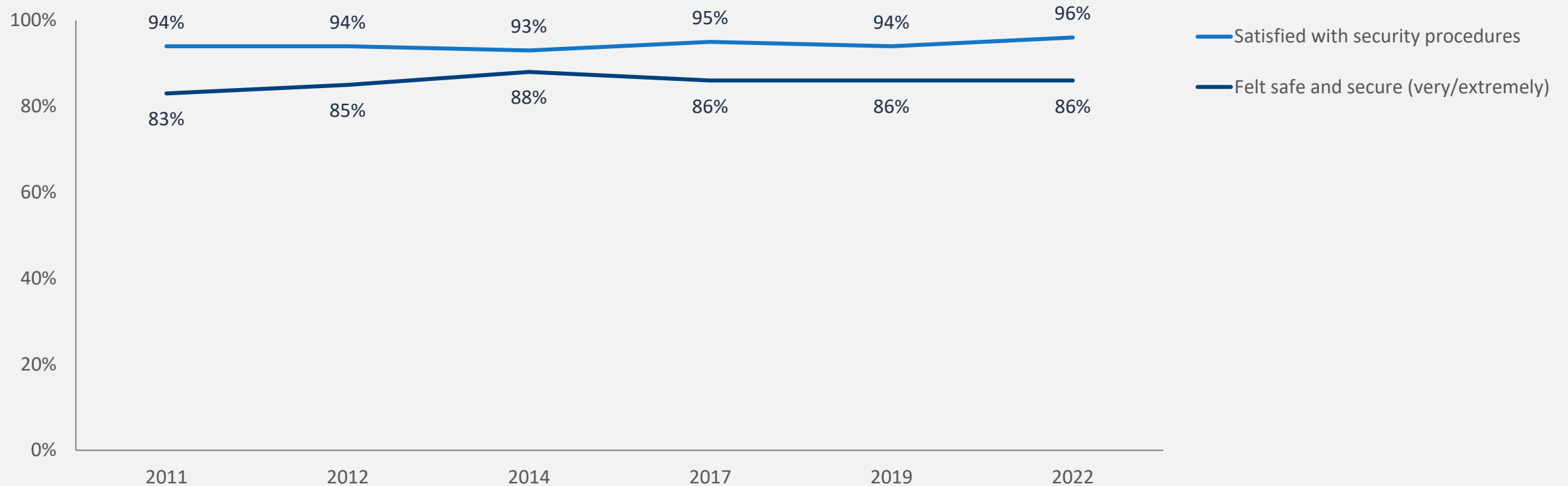
Perceptions of aviation
safety and security - based
on recent airport experiences



Aviation Security Service
— Kaiwhakamaru Rererangi —

International travellers continue to feel very safe and secure and generally very satisfied with New Zealand's aviation security. These travellers have not seen the same downturn as the New Zealand resident travellers.

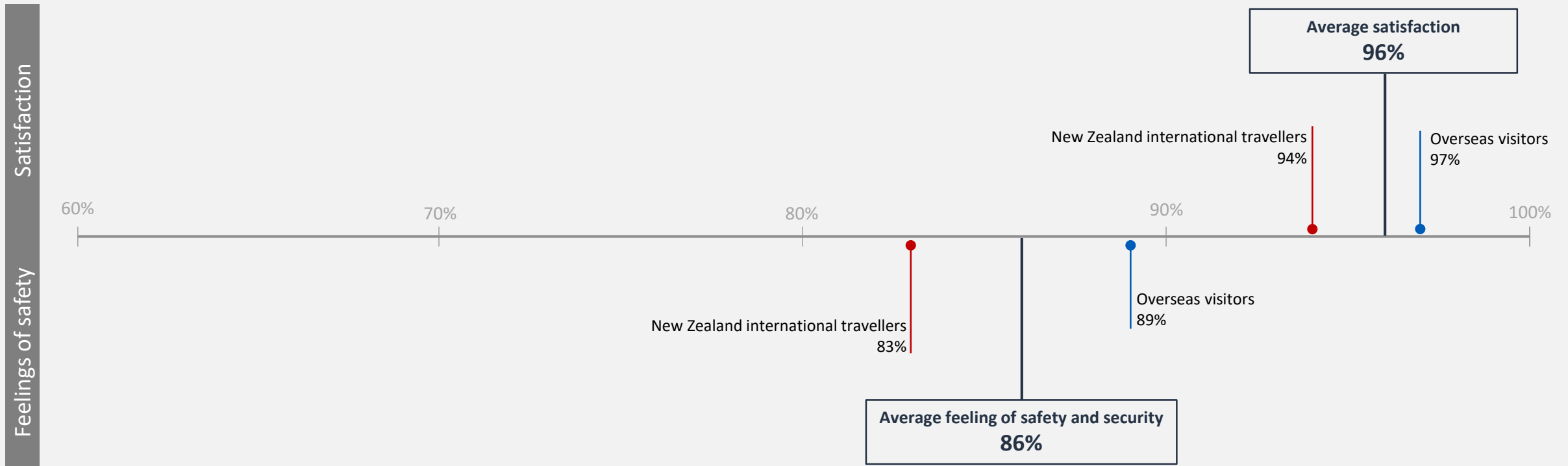
Satisfaction with security procedures and feelings of safety and security



Source: 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?
Q6. Overall how safe and secure do you feel travelling either on domestic flights in New Zealand or international flights departing from New Zealand?
Base: All international travellers (2011 n=310; 2012 n=325; 2014 n=327; 2017 n=329; 2019 n=302; 2022 n=314).

Overseas visitors in particular are very satisfied with New Zealand's aviation security procedures and generally feel very safe and secure when flying.

Satisfaction with security procedures and feelings of safety and security



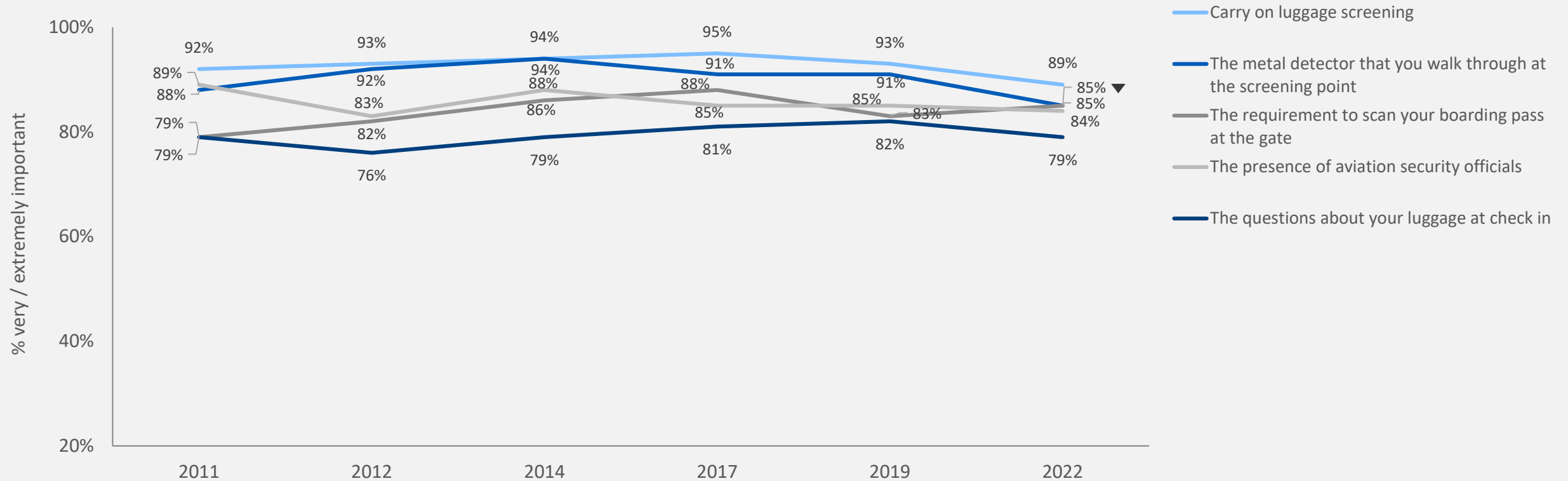
Source: Q5. Thinking only of the security checks at the airport before boarding your flight, and not the airline that you flew, how satisfied were you that the security procedures you undertook were going to keep you safe and secure for the duration of your flight?

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

Base: All international travellers (2022 n=314), New Zealand international travellers (2022 n=159), overseas visitors (2022 n=155).

One area of downturn for these travellers is the perceived need for specific security procedures. As suggested earlier, in the New Zealand resident travellers section, this is likely driven by passengers now considering other areas to be important in providing them with feelings of safety and security, for example Covid precautions.

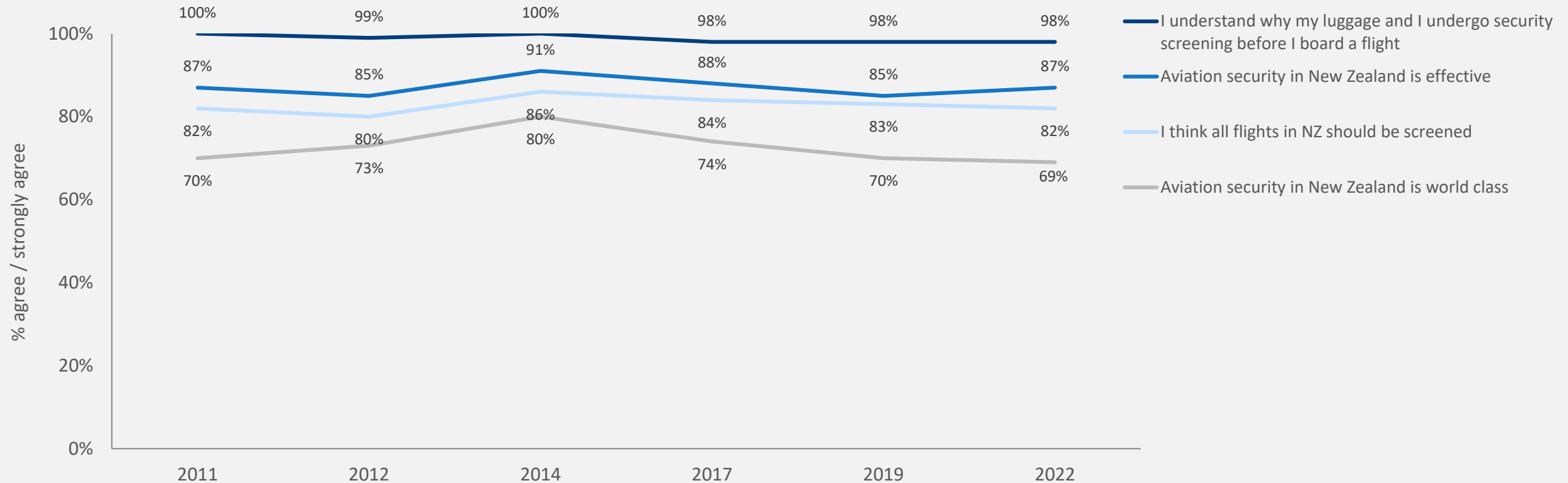
Importance of individual security procedures



Source: Q8. Please indicate how important or unimportant you think each of these security procedures is in keeping people safe and secure when they fly.
 Base: All international travellers (2011 n=310; 2012 n=325; 2014 n=327; 2017 n=329; 2019 n=302; 2022 n=314).

International travellers continue to have a high opinion of New Zealand aviation security. They also have a good understanding of why security screening is necessary. These travellers are more likely than New Zealand resident travellers to feel that all flights, including smaller domestic flights, should undergo the same screening procedures.

Perceptions around security screening

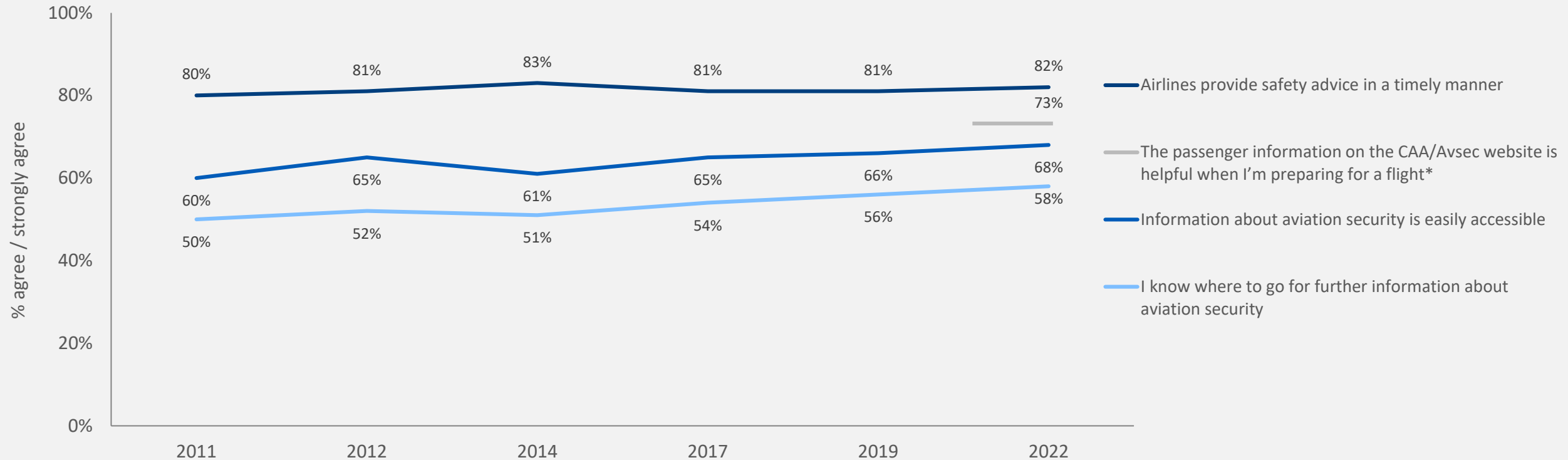


Source: Q9. Please indicate how much you agree or disagree with each statement.

Base: All international travellers (2011 n=310; 2012 n=325; 2014 n=327; 2017 n=329; 2019 n=302; 2022 n=314)

Perceptions around the availability of information are mixed. Most international travellers agree that airlines provide safety advice in a timely manner and the passenger information on Avsec’s website is helpful when preparing for a flight (among those aware of it). Two thirds agree that aviation security information is easily accessible while just over half know where to access further information.

Perceptions about information delivery and accessibility



* Statement asked for the first time in 2022.

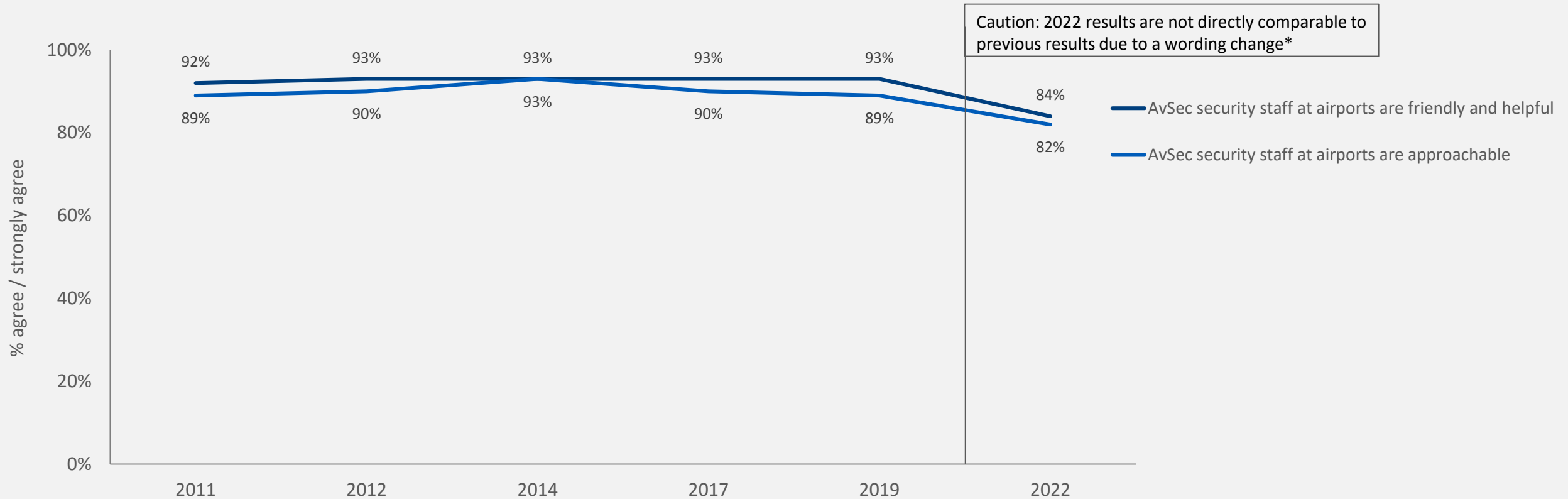
* Don't knows removed from base.

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

Base: All international travellers (2011 n=310; 2012 n=325; 2014 n=327; 2017 n=329; 2019 n=302; 2022 n=314)

Most international travellers feel Avsec staff are friendly, helpful and approachable.

Perceptions of AVSEC staff



Note: * in 2022 both statements were reworded to specifically include 'Avsec'.
Source: Q9. Please indicate how much you agree or disagree with each statement.
Base: All international travellers (2011 n=310; 2012 n=325; 2014 n=327; 2017 n=329; 2019 n=302; 2022 n=314)

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The impact of Covid on
travel and passengers

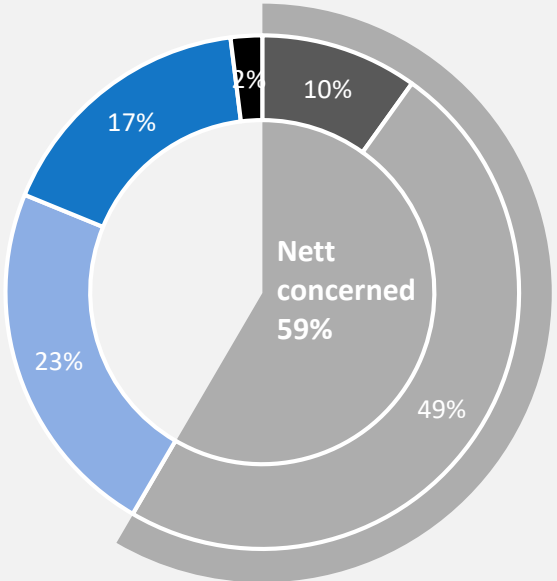
A third of overseas travellers feel that Covid will continue to impact their travel decisions over the next couple of years, and more than half are concerned about catching Covid when flying.

The continued impact of Covid on travel



34% of international travellers feel that over the next couple of years Covid will continue to impact their travel decisions.

Concerns around Covid and flying

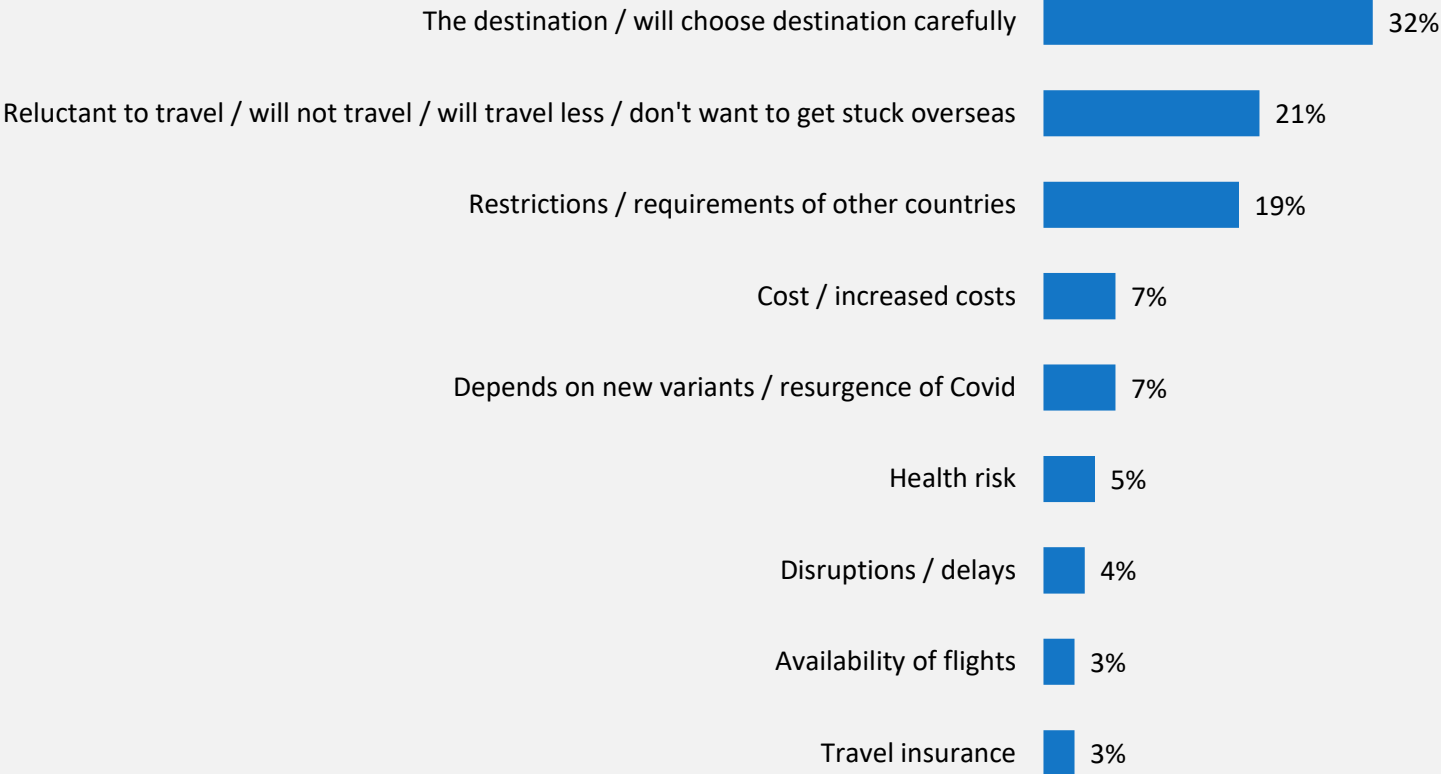


- Very concerned, it makes me reluctant to fly
- Somewhat concerned, but it doesn't stop me flying
- Not that concerned
- Not at all concerned
- Don't know



*Note: Fieldwork was carried out from 9 to 19 September 2022. On 13 September the New Zealand government removed almost all Covid rules and precautions. Many respondents travelled and completed the survey after the restrictions were removed and as such had a different experience to those who completed the survey earlier.
 Source: COV4. Over the next couple of years do you think COVID will impact your travel decisions? For example, where you go, how you choose to get there, and how often you go? COV3. And generally, how concerned are you about catching COVID when you fly?
 Base: All international travellers (2022 n=314).

Those who feel Covid will continue to impact their travel decisions over the next couple of years tend to say: 1. they are likely to be more careful when selecting their destination, 2. they are simply reluctant to travel because of Covid, and 3. they are aware that different countries have different Covid rules and regulations which may prevent or impact their travel.



Categories less than 3% not shown in chart.
Source: COV5. How do you think COVID will impact your travel decisions over the next couple of years?
Base: International travellers who feel Covid will continue to impact their travel decisions over the next couple of years, excluding don't know (2022 n=73).

KANTAR PUBLIC

Knowledge around aviation
safety and security

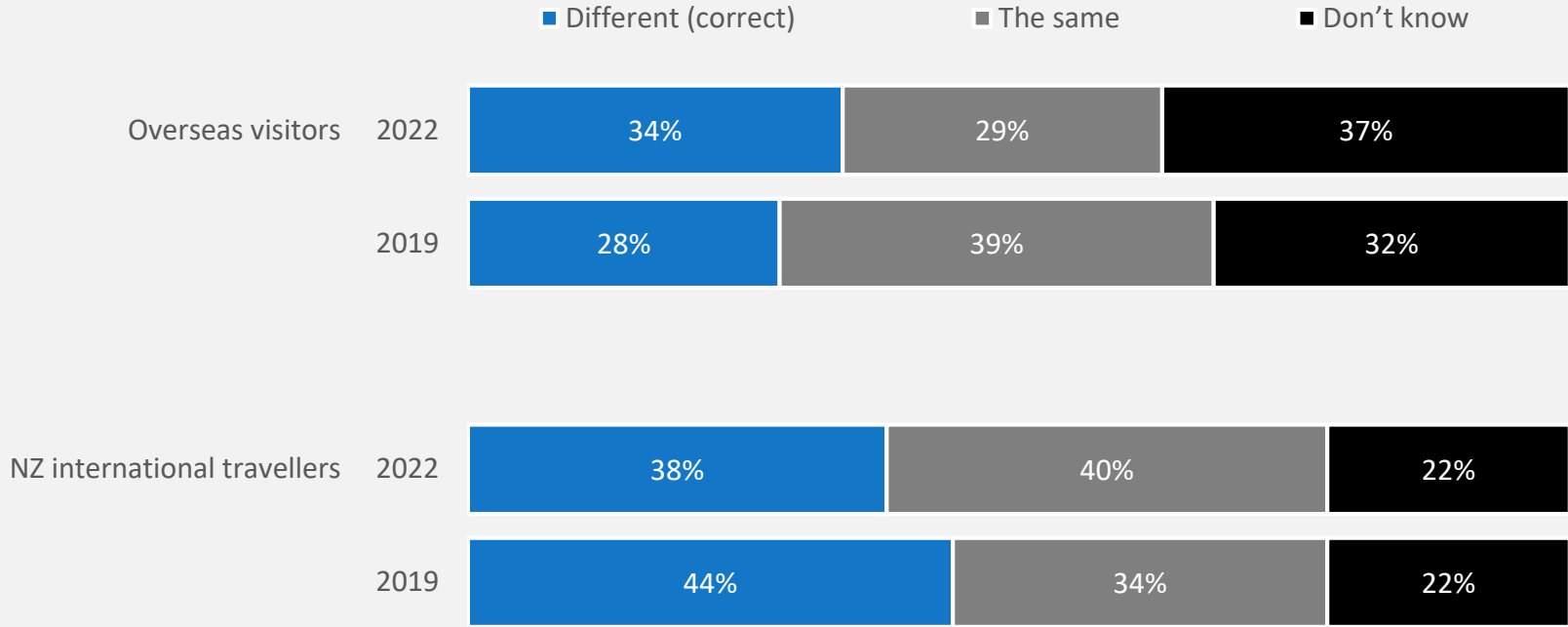


Aviation Security Service

Kaiwhakamaru Rererangi

Just a third of international travellers know the luggage restrictions are different between international and domestic flights. This year, New Zealand international travellers are slightly, but not significantly, more knowledgeable than overseas visitors.

Knowledge of luggage restrictions (international vs domestic)



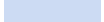


Source: Q16. Are the New Zealand restrictions on items in luggage the same or different for domestic and international flights?
 Base: All international travellers (2019 n=302; 2022 n=314).

When it comes to specific rules, as with the New Zealand resident travellers, confusion most commonly arises when there are differing rules between carry on and checked.

Knowledge of specific rules

		International flights						
		Carry on			Checked in			
		Okay	Not okay	Don't know	Okay	Not okay	Don't know	
AirPods / Earbuds	✓	95%	1%	4%	✓	88%	8%	4%
Laptop (x1)	✓	96%	2%	2%	✓	63%	30%	7%
Perfume (75ml)	✓	74%	16%	10%	✓	77%	14%	9%
Prescription medicine	✓	93%	4%	3%	✓	85%	7%	7%
Toothpaste (80ml)	✓	74%	15%	10%	✓	79%	9%	12%
Bottle of water (250ml)	✗	47%	47%	6%	✓	52%	35%	13%
Butter (500g)	✗	13%	72%	15%	✓	26%	55%	19%
Can of Coke (330ml)	✗	32%	55%	13%	✓	31%	53%	16%
Gin (750ml) in a Security Tamper Evidence bag	✗	54%	26%	20%	✓	52%	30%	18%
Manuka Honey (500g)	✗	29%	51%	20%	✓	49%	34%	18%
Perfume (125ml)	✗	32%	56%	12%	✓	65%	23%	12%
Snow Globes	✗	20%	46%	34%	✓	37%	33%	30%
Talcum Powder (400ml)	✗	15%	54%	30%	✓	46%	33%	21%
Power Drill	✗	4%	86%	10%	✓	23%	62%	15%
Scissors with 10cm blade	✗	3%	91%	6%	✓	38%	55%	7%
Swiss Army Knife with 7cm blade	✗	2%	92%	6%	✓	36%	54%	10%
e-cigarette / Vape (x1)	✓	24%	63%	13%	✗	38%	48%	13%
Lighter (x1)	✓	18%	77%	5%	✗	18%	71%	12%
Loose batteries (e.g., AA, AAA, or 9v)	✓	34%	51%	15%	✗	29%	55%	15%
Power Bank (x1) (a portable battery)	✓	62%	28%	10%	✗	32%	60%	8%
90Wh power tool battery (18 volt, 5.0Ah battery)	✓	14%	65%	21%	✗	16%	63%	21%
Fire-works	✗	1%	94%	5%	✗	3%	89%	8%
LPG Bottle	✗	2%	89%	9%	✗	3%	84%	13%

 Allowed in that type of bag
 Not allowed in that type of bag
 Particularly low awareness

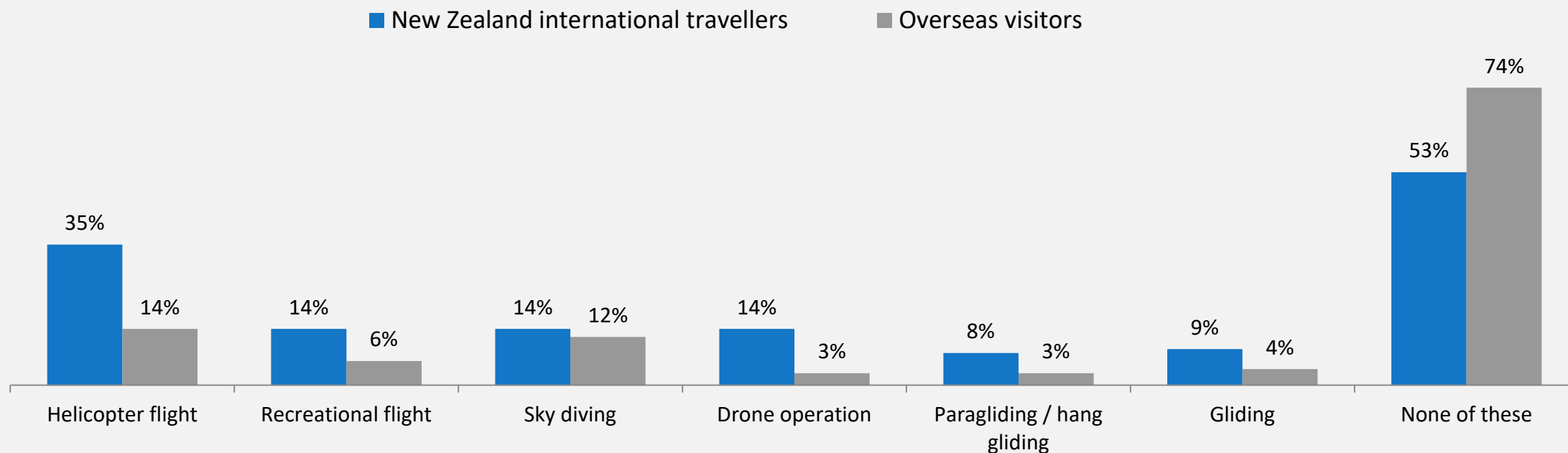
Source: Q15. Thinking about the flight you're about to go on today. Q15a. Imagining again that you were about to go on [insert a domestic flight within/ insert an international flight from] New Zealand. Which of these items are okay to take in your checked-in bags and which are not okay? Base: All international travellers (2022 n=314)

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Perceptions of aviation safety and security - based on all aspects of CAA's responsibilities

Around a quarter of overseas visitors have undertaken one or more other CAA monitored activities. Just under half of New Zealand international travellers have done so.

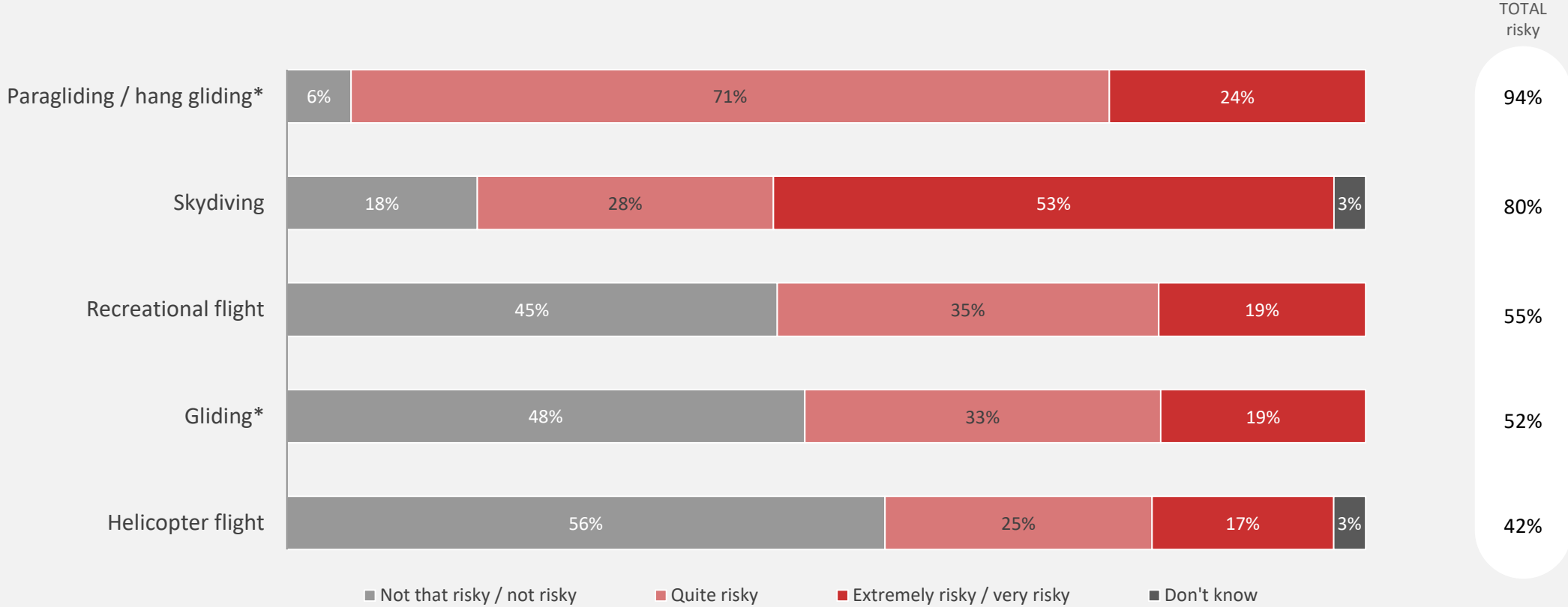
Uptake of other CAA monitored activities



Source: Q11. The Civil Aviation Authority has responsibility for all aviation activities in New Zealand. The most well-recognised is aviation security at NZ airports. However, there are other aviation activities it is also responsible for. The table below lists some of the aviation activities that CAA is responsible for. Have you ever undertaken any of the following activities in New Zealand?
Base: All New Zealand international travellers (2022 n=159), overseas visitors (n=155).

Of those who have done each activity, paragliding/hang gliding and skydiving are perceived to be the most risky.

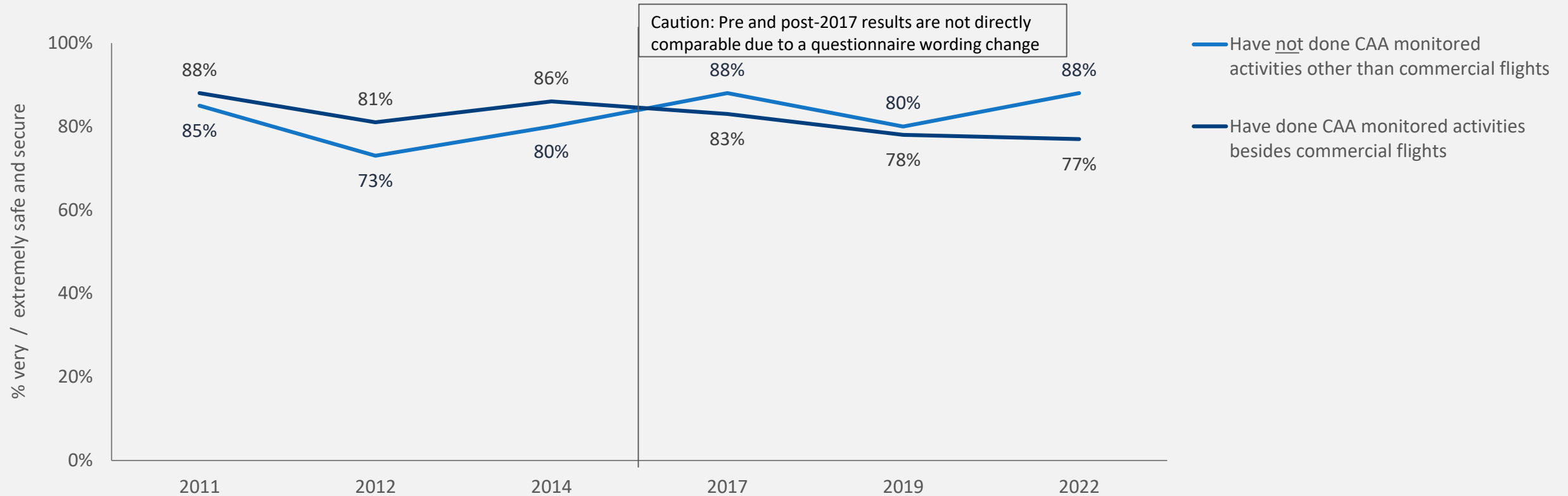
Risk perceptions (among those who have done each activity)



Source: Q13. Please indicate how risky you think each of these activities is to the personal safety of the people that undertake them?
 Base: Those who have undertaken paragliding / hang gliding (2022 n=17), skydiving (2022 n=40), recreational flight (2022 n=31), gliding (2022 n=21), helicopter flight (2022 n=77).

As seen with the New Zealand resident travellers, when we factor in the additional CAA monitored activities previously mentioned, feelings of safety and security dip among those who have participated in at least one of these activities.

Feelings of safety and security

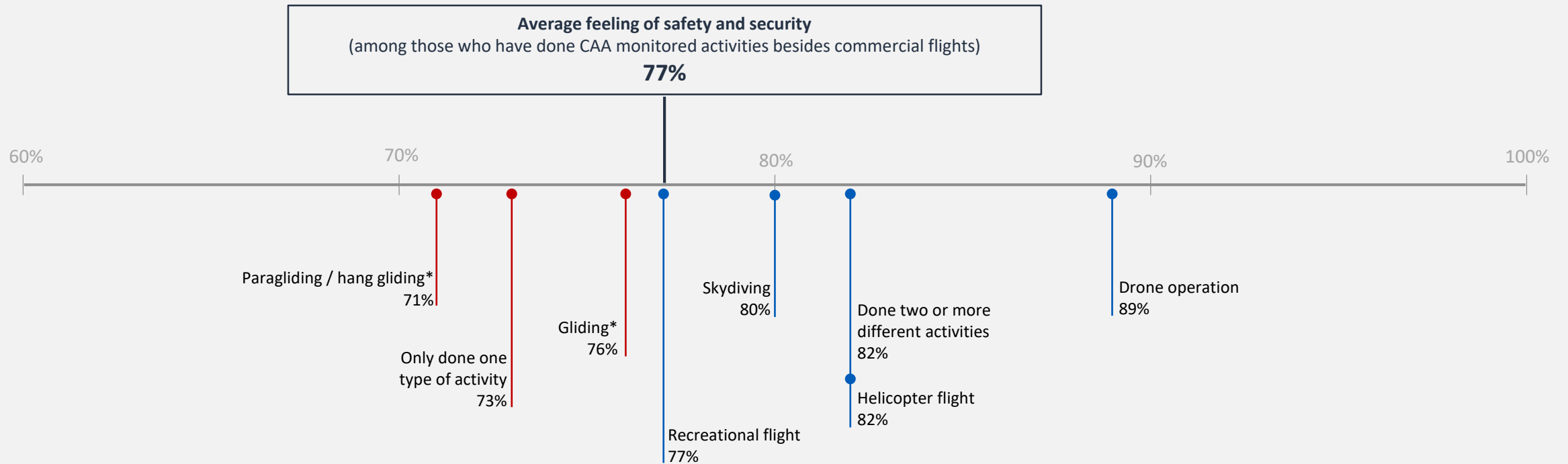


Source: Q12. Thinking about all aspects of aviation safety and security in New Zealand, overall how safe and secure do you feel when you fly (or undertake one of the activities in the last question)?

Base: All international travellers who have not done CAA monitored activities other than commercial flights (2011 n=253; 2012 n=240, 2014 n=245; 2017 n=249; 2019 n=201; 2022 n=199), international travellers who have done CAA monitored activities besides commercial flights (2011 n=57; 2012 n=85, 2014 n=81; 2017 n=80; 2019 n=98; 2022 n=115).

Again, these lower levels of safety and security are primarily driven those who have undertaken just one of the listed activities. Those who have undertaken paragliding/hang gliding or gliding also have lower levels of safety and security, however these results must be treated with caution due to the small number of international travellers who have done each of these activities.

Feelings of safety and security



* Caution small base size.

Source: 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]?

Base: International travellers who have done CAA monitored activities besides commercial flights (2022 n=115), recreational flight (2022 n=31), operating a drone (2022 n=27), gliding (2022 n=21), flying in a helicopter (n=77), paragliding / hang gliding (n=17), skydiving (n=40), one activity (n=66), two or more activities (n=49).



Appendix

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.

Research method



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

- Online survey of 1,001 New Zealanders aged 18 years and over who have travelled by air in, or from, New Zealand within the last 12 months.
- Sample sourced from Colmar Brunton's online panel (around 100,000 members) and panel partners.
- Average time to complete survey was approximately 13 minutes.
- 31% response rate was achieved.
- All interviews were completed between 9 and 26 September 2022.
- Maximum margin of error for the total sample of 1,001 interviews is +/- 3.1% at the 95% confidence level.



Research method for intercept survey of international air travellers at airports

- Intercept survey of 314 international travellers at departure lounges at Auckland International Airport.
- Of the 314 international travellers surveyed, 159 had mainly lived in New Zealand for the last 12 months and 155 had mainly lived overseas for the last 12 months, with Australia being the most common country of residence besides New Zealand.
- Average interview length was approximately 12 minutes.
- 66% response rate was achieved.
- All interviews were completed from 9 and 19 September 2022.
- Maximum margin of error for the total sample of 314 interviews is +/- 5.5% at the 95% confidence level.



FOR FURTHER INFORMATION PLEASE CONTACT

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- a. The research technique and methods used in a Marketing Research project do not become the property of the Client, who has no exclusive right to their use.
- b. Marketing research proposals, discussion papers and quotations, unless these have been paid for by the client, remain the property of the Researcher.
- c. They must not be disclosed by the Client to any third party, other than to a consultant working for a Client on that project. In particular, they must not be used by the Client to influence proposals or cost quotations from other researchers.

Publication of a Research Project

Article 31 of the Research Association NZ Code states:

Where a client publishes any of the findings of a research project the client has a responsibility to ensure these are not misleading. The Researcher must be consulted and agree in advance to the form and content for publication. Where this does not happen the Researcher is entitled to:

- a. Refuse permission for their name to be quoted in connection with the published findings
- b. Publish the appropriate details of the project
- c. Correct any misleading aspects of the published presentation of the findings

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