



Project Feel Safe

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

July 2011

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The Civil Aviation Authority is the government agency that is responsible for the oversight of New Zealand's civil aviation system. The Civil Aviation Act 1990 both establishes the Authority, and defines its functions.

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

- civil aviation connects New Zealand with the rest of the world
- civil aviation is an important means of internal connection between places — for business and social purposes; and
- civil aviation directly and in-directly contributes close to \$10 billion a year to the NZ economy.

The Authority has two operational arms: the CAA which regulates New Zealand's civil aviation system; and Avsec, the provider of security services within the NZ 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 CAA and Avsec will use this information to inform both their management and governance decisions. Further, the CAA and Avsec wish to establish baseline information to inform the preparation of Statement of Intent for the 2011/12 financial year.

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. In both cases, perceptions are driven by the interactions individuals have with either the organisations or the civil aviation system, 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 Avsec and CAA, should perceive. Users should feel safe when they step into an airport or on to an aircraft; and people or organisations interacting with Avsec or the CAA should feel confident that safety (including security) issues are effectively managed and addressed as consequence of that interaction.

The points of interaction, through 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., Avsec and the CAA) working to maintain the safety and security of that system.

Measuring ‘Feel Safe’, and having key indicators that inform decisions about the work that needs to be done to maintain or increase ‘feeling safe’, is the focus of this work. Key performance indicators need to be ‘pitched’ 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.

The CAA and Avsec have commissioned Colmar Brunton to undertake baseline surveys among three audiences:

1

An online survey of air travellers who live in New Zealand

2

An intercept survey of international air travellers at airports

3

An online survey of key stakeholders

Two user surveys (resident traveller and international traveller)

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

- establish a baseline measure that allows changes in perceptions to be tracked over time
- understand 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
- provide information about the age, gender and ethnicity of users of different types of aviation to allow for more detailed analysis of user-expectations.

Stakeholder survey

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:

- establish a baseline measure that allows changes in perceptions to be tracked over time
- gather information about what is driving the perceptions (e.g., quality and timeliness of advice, accessibility of information; ease of interaction; transparency of decision making; etc)
- understand how stakeholder perceptions vary
- understand how respondents' perceptions vary by the different groups that represent the key stakeholders the CAA and Avsec interact with (e.g., monitoring and control agencies, policy agencies, other operational agencies, industry bodies, large operators, etc).

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

- Online survey of 1036 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 (over 140,000 members).
- Average time to complete survey was 8 minutes.
- All respondents completed the survey during the period of 23 May June to 15 June 2011. Note, over 90% of the sample were surveyed before the 8th of June, 2011. The media activity surrounding the effect of volcanic ash on travel is therefore likely to have had very little effect on the survey results.

Research method of intercept survey of international travellers at airports

- Intercept survey of 310 international travellers at departure lounges at Auckland international airport (219 interviews) and Wellington international airport (91 interviews).
- Of the 310 international travellers surveyed, 161 had mainly lived in New Zealand in the last 12 months and 149 had mainly lived overseas in the last 12 months, with the most common countries being Australia, UK and the USA.
- Average interview length was 8 minutes.
- All interviews were completed from 1 June to 7 June 2011.

Research method of stakeholder survey

- Online survey of key stakeholders who interact with either or both of the CAA and Avsec.
- The CAA provided Colmar Brunton with a list of stakeholders to contact. Invitations to complete the survey were sent to 26 stakeholders covering 19 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, 27 people completed the stakeholder survey.
- Average time to complete the survey was 12 minutes.
- All respondents completed the survey during the period of 13 June to 3 July 2011.
- The reader should be aware that during the stakeholder survey period, there was significant media and industry activity regarding volcanic ash and its effects on air travel in New Zealand.

72%

of resident travellers felt extremely or very safe and secure on their most recent domestic or international flight

86%

of overseas visitors feel extremely or very safe and secure on domestic or international flights departing from New Zealand

44%

of 27 key stakeholders are satisfied with the safety and security performance of the civil aviation system in New Zealand

83%

of people flying to overseas destinations from NZ feel safe

73%

of people flying on screened domestic routes feel safe

68%

of people flying on non-screened domestic routes feel safe

74%*

of people taking sight-seeing flights feel safe

80%*

of people taking commercial adventure flights feel safe

53%*

of people taking recreational flights feel safe

** Caution, small sample sizes*

Both the resident traveller survey results and the international traveller survey results indicate that overall, perceptions of safety and security in New Zealand aviation are very positive. Indeed, over two thirds of New Zealand resident travellers felt either 'extremely' or 'very' safe and secure on their most recent domestic flight and more than eight in ten international travellers (including overseas visitors to our country) feel 'extremely' or 'very' safe and secure on domestic flights or international flights departing from New Zealand.

On the whole, these positive findings are evident across the broad spectrum of demographic groups and hold true regardless of the traveller's choice of airline. The reader should note, however, that the traveller surveys were both conducted before the significant media activity regarding volcanic ash and its effects on air travel in New Zealand. This may or may not have had an effect on perceptions of safety.

As might be expected, there are some differences in perceptions of the safety and security of flights on screened domestic routes compared to non-domestic routes. While passengers on the latter feel less safe and secure, very few feel unsafe. Rather, some shift from the 'extremely safe and secure' category to the 'very safe and secure' category. Having said that, the research also indicates that carry-on luggage screening, metal detectors at the screening point, the scanning of board passes, the presence of aviation security officials and being questioned about luggage at check in are all perceived to be important security procedures in keeping people safe and secure when they fly.

There are perceived to be significant risks associated with participating in other aviation activities (such as sky diving, recreational flying, gliding etc) both among those who take part in these activities and those who don't. However, nearly all of the participants of these activities still feel at least 'quite' safe and secure when flying or undertaking aviation activities in New Zealand. Among those who have not taken part in these activities, prompting them to think about these less common (and more risky) types of aviation activities has the effect of lowering their perceptions of the safety and security of aviation activities in New Zealand.

In contrast, the stakeholder survey results are mixed. Generally, perceptions of Avsec are fairly positive. In particular, stakeholders comment positively on Avsec's quality staff and international reputation.

Perceptions of CAA are notably less positive. While around half of the stakeholders who took part in this survey perceive that the CAA oversees the implementation and adherence to safety and security regulations in the industry at least 'quite well', most of the stakeholders in this research lacked confidence in the management of CAA to provide effective safety and security measures for the New Zealand aviation industry. This lack of confidence appears to stem from a number of factors including a perceived lack of resources and slow response times, and a perception of the CAA as a reactive organisation that is constrained by rigid rules and a lack of leadership.

The reader should note, however, that the number of respondents who took part in the stakeholder survey was small (n=27). Further consideration should be given to whether it is appropriate to expand the sample frame for this component of the research to check with the perceptions that have emerged in this survey are widespread across the industry.

The logo for the Civil Aviation Authority of New Zealand, featuring the letters 'CAA' in a stylized, bold font.

CIVIL AVIATION AUTHORITY
OF NEW ZEALAND

Te Mana Rererangi Tūmatanui o Aotearoa



Aviation Security Service

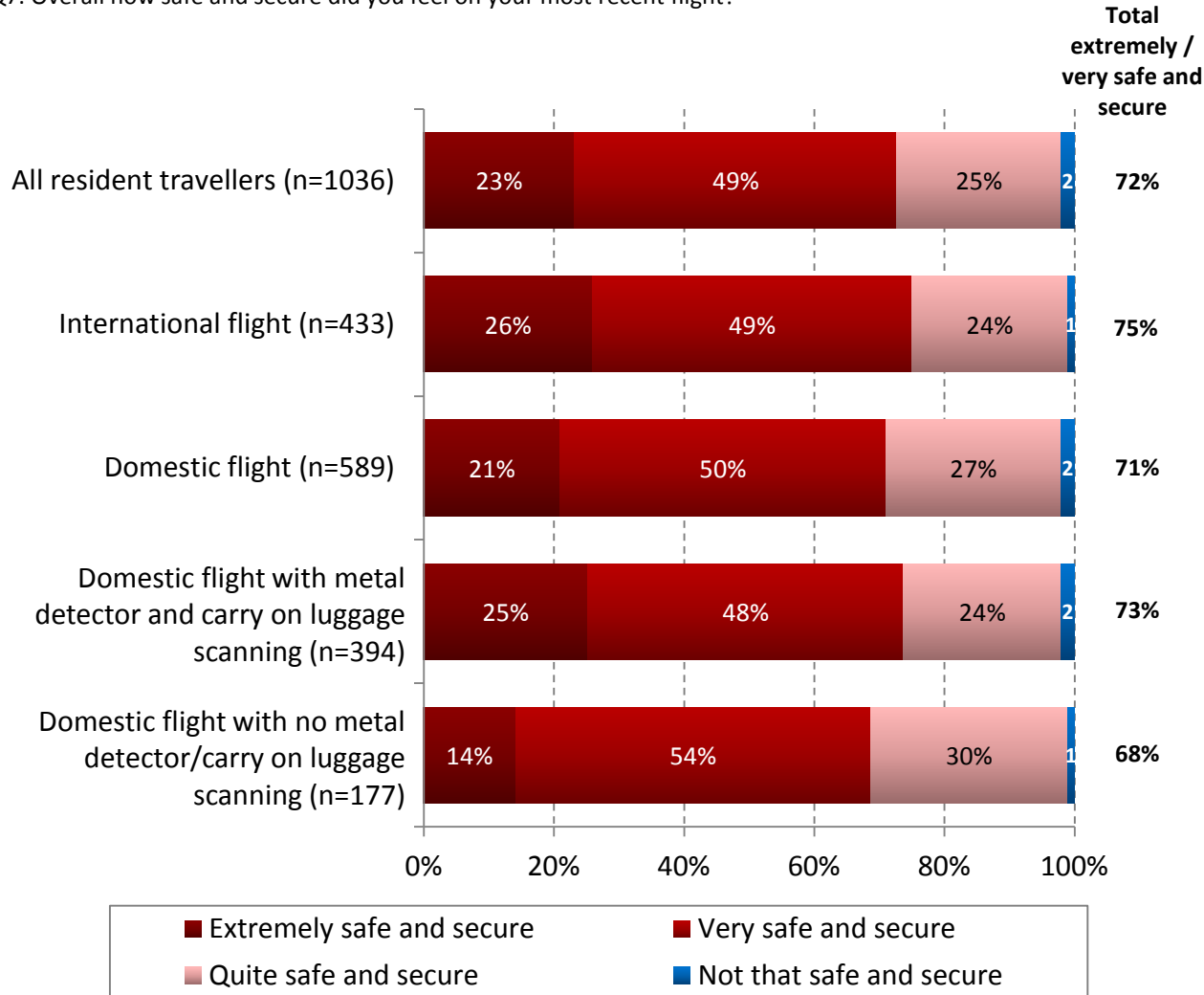
Kaiwhakamau Rererangi



New Zealand resident traveller survey results

Overall perception of feeling safe and secure on most recent flight

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



Nearly three quarters (72%) of New Zealand resident travellers felt either extremely or very safe and secure on their most recent flight.

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

Few demographic differences exist.

Young people are more likely to feel extremely safe and secure than their older counterparts (30% of 18 to 24 year olds compared to 22% of those aged 25 years and over).

More frequent flyers are more likely to feel extremely safe and secure than those who fly less frequently (29% of those who flew 4+ flights in the last 12 months compared to 20% of those who flew on only 1-3 flights in the last 12 months)

Many residential travellers who felt 'safe and secure' during their most recent flight did so because they believe there isn't any real threat to their safety or anything to be insecure about while flying

"Millions of people fly millions of miles every day, Few accidents. Flying is generally a safe thing to do. Safer than driving."
(Extremely safe and secure)

"I don't tend to think about security too much, especially not in NZ where the risk of terrorism is fairly low." (Very safe and secure)

"I believe there is a negligible threat flying domestically anyway and the over the top precautions that exist will pick up the tiny number of problems that might exist. The way they were pulling out all sorts of nonsense (nail clippers!) leads me to believe that if an actual threat exists it is being looked for."
(Extremely safe and secure)

"I'm not scared of flying, so I felt safe..."
(Quite safe and secure)

"I feel New Zealand is a safe country to fly in."
(Extremely safe and secure)

"No point in feeling any other way, why worry about something that may never happen."
(Very safe and secure)

"I have no expectation of any terrorist activity occurring and I expect that aircraft will be well maintained and staff properly trained."
(Extremely safe and secure)

"NZ is a safe country. I am hardly likely to be attacked on a plane [by] someone [who] has had to pay a significant amount to board in the same way I am unlikely to be attacked while in a long distance bus. I also don't think there is any 'terrorist' risk so it's not something I worry about. If I worry, it's about weather!"
(Very safe and secure)

"I was on smaller planes from Palmerston North and then to Nelson from Christchurch and back and there was no security checks on that size plane. However I still felt I wasn't at risk. Who would bother with that size of plane on that route?" (Quite safe and secure)

Some of those who felt 'safe and secure' during their most recent flight felt this way because they believe adequate security checks were performed before boarding the flight

*"My hand luggage was fully screened, and I also had to walk through a security arch into the gate area. Everyone else had to go through the same procedure which made me feel safe."
(Extremely safe and secure)*

*"Well I am a pretty innocent looking person and I was taken aside to have my bags and body checked. Seemed like every 2nd or 3rd person was getting checked. That makes me feel pretty safe I guess."
(Extremely safe and secure)*

*"The airport screening process was very thorough especially compared with other countries where I have travelled recently. There was more than one checkpoint."
(Very safe and secure)*

*"All passengers and their hand luggage were thoroughly screened by AVSEC staff and I know AVSEC screened all the other luggage as well."
(Extremely safe and secure)*

*"The security measures in place at airports and in airplanes are at a level that makes me feel safe."
(Quite safe and secure)*

*"They x-rayed my possessions to check no weapons/explosives or things that could [be] used as weapons/explosives could be taken on board. Plus I personally went through a scanner. Save for a full body search/cavity search what else can they do? What they do gives travellers confidence [that] they take security of the flight seriously."
(Very safe and secure)*

*"There were 3 or 4 different security checks and everything seems very strict so I don't imagine that anything unsafe could happen."
(Extremely safe and secure)*

*"A passenger had an odd looking parcel and security got the bomb dogs up to check it out."
(Quite safe and secure)*

Others felt 'safe and secure' during their most recent flight because of the professionalism and trustworthiness of the security staff or in-flight staff

"All of the attendants were very professional in the way they dealt with passengers and in the execution of their duties. Nothing was a bother and everything was stowed properly, attention was paid to seat backs etc. I felt very comfortable."

(Very safe and secure)

"Felt that staff knew what they were doing, were attentive and checked on everyone as we went through the flight."

(Quite safe and secure)

"Professional attitude of staff that checked security."

(Very safe and secure)

"The professionalism displayed by the airline staff as well as the security staff was very reassuring. On the plane the cockpit door was closed. The travellers went to their allocated seats and sat down in readiness for the trip."

(Extremely safe and secure)

"Confidence in the Aircraft crew and procedures."

(Quite safe and secure)

"Good information provided on safety procedures and staff were confident in delivering the information and ensuring that passengers were looked after."

(Extremely safe and secure)

Some were made to feel 'safe and secure' from the friendliness and calmness of the cabin crew

"We had the most fantastic hostess looking after us. I am afraid of flying and she really helped a lot with her cheerful smile and the way she talked to me."
(Extremely safe and secure)

"The cabin crew and passengers were all looking relaxed."
(Quite safe and secure)

"Just the security was good. The Emirates staff are calming."
(Extremely safe and secure)

"Good friendly staff, on ground and air crew. Enjoy flying."
(Extremely safe and secure)

"Staff that appeared relaxed and experienced."
(Quite safe and secure)

"I was well looked after, the staff was nice and very helpful."
(Very safe and secure)

"Flight attendants polite and friendly."
(Very safe and secure)

While others felt 'safe and secure' because of the good reputation of the airline they were flying with

"Am flying regularly and have complete faith in the airlines flying with."
(Extremely safe and secure)

"I have total trust in Air NZ to make every flight as safe as possible."
(Very safe and secure)

"I am very happy with maintenance etc that Singapore [airlines] does. There planes always travel on time and staff are very professional."
(Extremely safe and secure)

"Air NZ and Air Nelson have a very good record of safe travel."
(Very safe and secure)

"To be honest being safe on a plane, is the knowledge that these airline fly thousand of miles with no incidents. One relies on the airline setup, that we are not privy to."
(Quite safe and secure)

"At the time of the flight, Qantas had a good record for not crashing! ..."
(Very safe and secure)

The main thing that made residential travellers not feel 'safe and secure' during their most recent flight was their personal fear of flying

*"I am scared of flying and with many plane crashes recently it just adds to my fears. There seems to be about 1 a week world wide and I fear it will happen to me when I fly."
(Not at all safe and secure)*

*"I have a fear of flying. The flight was fine but throughout flights I have anxiety which means I don't feel safe and secure even when all around me suggests that nothing is wrong."
(Not that safe and secure)*

*"Sorry, just not a good flyer."
(Not that safe and secure)*

Other residential travellers did not feel 'safe and secure' during their most recent flight as they believed inadequate security checks were done

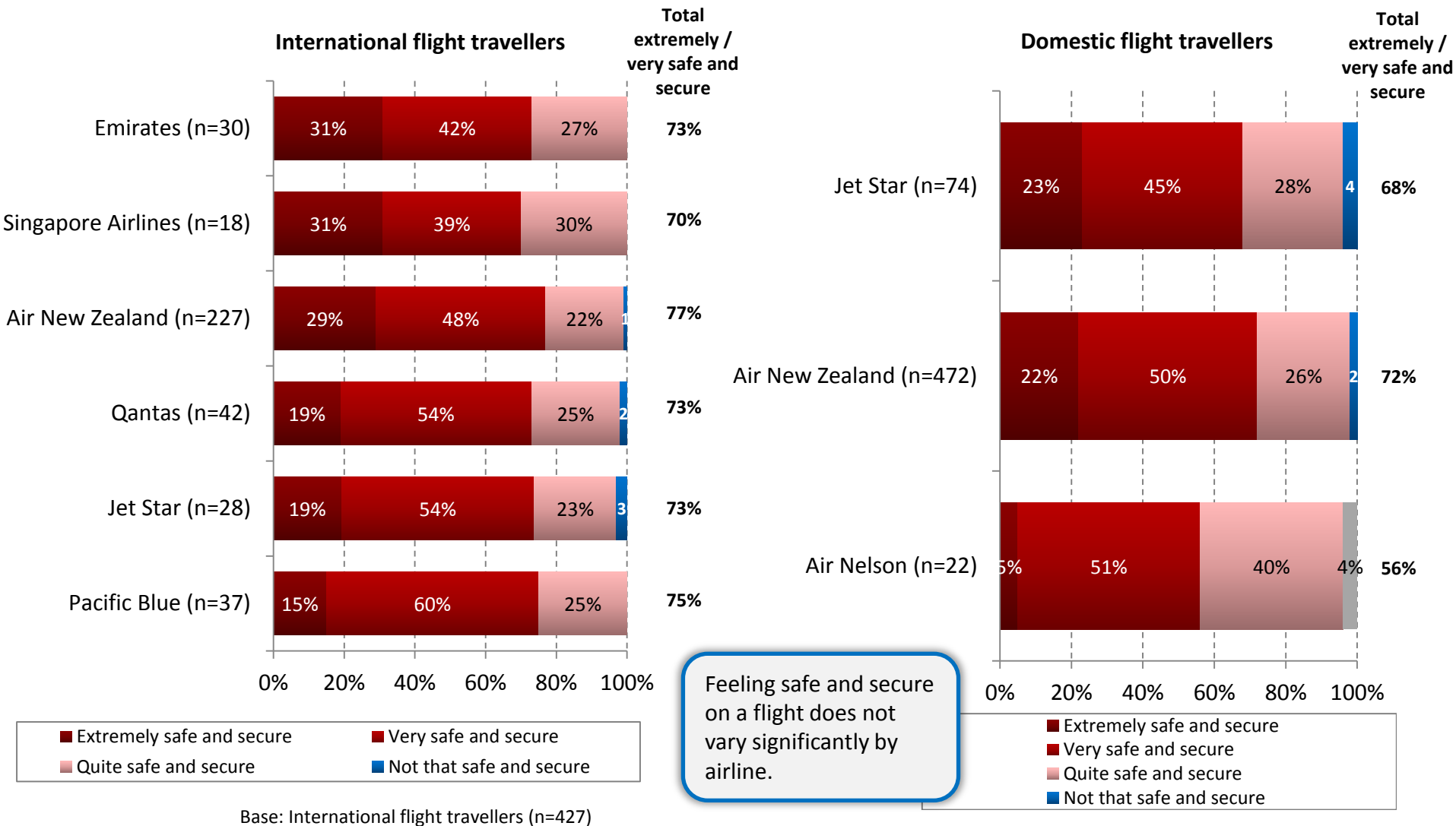
"Mistakenly had [a] sharp object in carry on luggage and [it was] not picked up at Auckland."
(Not that safe and secure)

"I could have been travelling with a terrorist as there was no identity check."
(Not that safe and secure)

"I struggle to understand why they let drunk people on flights drink even more?"
(Not that 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?

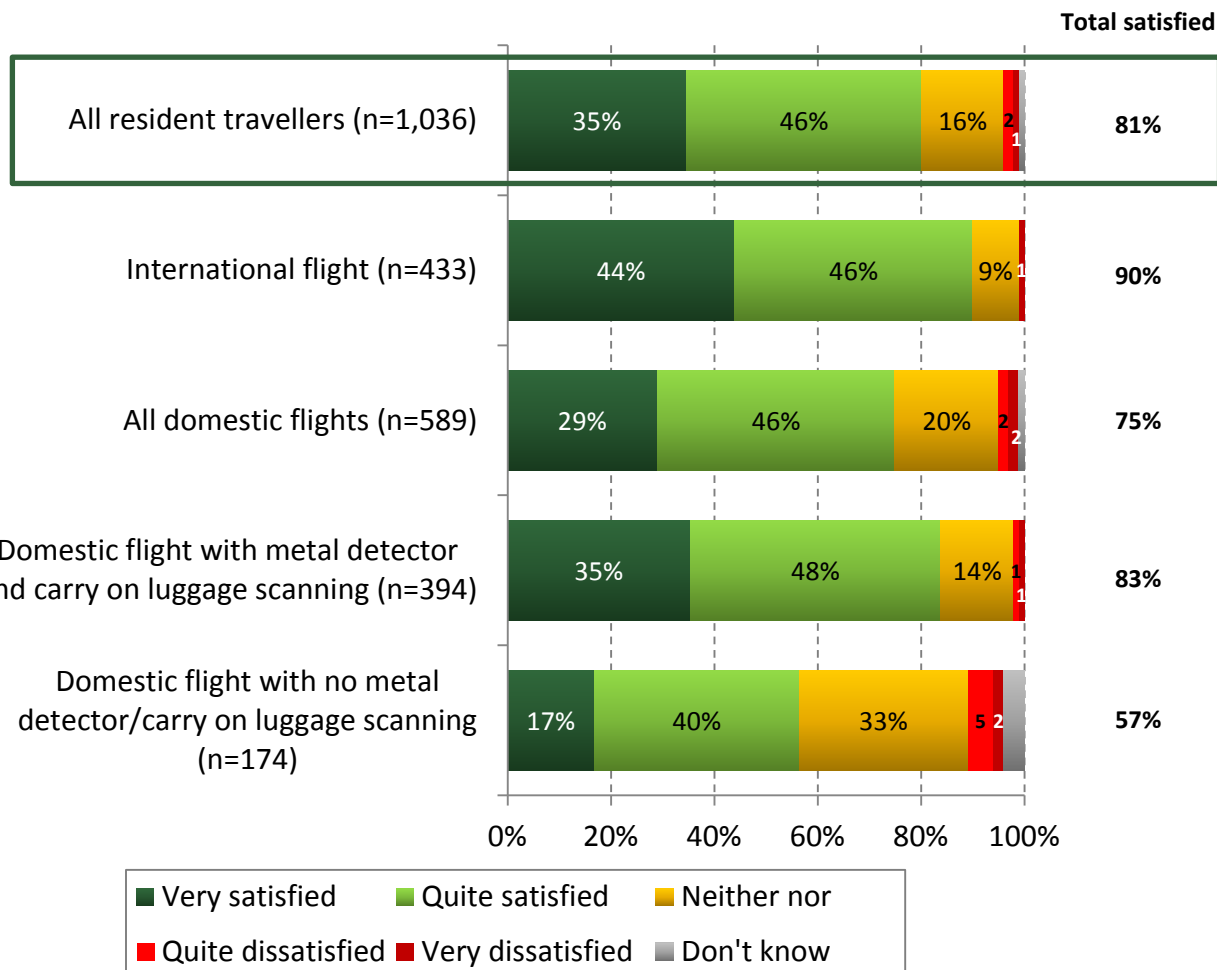


Base: International flight travellers (n=427)

Base: Domestic flight travellers (n=589)

Overall perceptions of security checks before flight

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?



Eight in ten New Zealand travellers were either very or quite satisfied that the security procedures they undertook were going to keep them safe and secure for the duration of their flight. New Zealand travellers on international flights were more satisfied than those travelling on a domestic flight.

Likewise, domestic flight passengers who went through a personal security check involving a metal detector and the scanning of carry-on luggage were much more satisfied with the personal security checks than those who did not go through these types of checks.

Two key sub-group differences:

Very frequent flyers are more likely to either be very or quite dissatisfied, or give a neutral response, than those who fly less frequently (29% of those who fly 10 times a year or more compared to 17% of those who fly less than 10 times a year)

Older travellers are more likely to be either very or quite satisfied than younger travellers (94% of those aged 65 years or over compared to 79% of those aged under 65 years).

Actually doing some visible pre-flight safety checks would help improve the level of satisfaction amongst some resident travellers who felt ‘very’ or ‘quite’ dissatisfied with the security procedures

“There were no security checks from Dunedin airport (we were connecting from Dunedin to Christchurch then Auckland then LA then Philadelphia). Anyone could have brought anything on board...”
(Quite dissatisfied)

“I didn’t see any real security checks at Tauranga Airport at all.”
(Quite dissatisfied)

“There was no checking of ID or bags of any sort.”
(Very dissatisfied)

“The flight was a small aircraft (ATR) with relatively few passengers and there were no security checks at all (that I was aware of).”
(Quite dissatisfied)

“I felt there was no check for weapons, or other dangerous stuff at all. Maybe there was and I did not realise what was happening, but I think I may have been able to take threatening items on board and no-one would have known.”
(Quite dissatisfied)

“They never checked our ID at all. We put our own bags on the belt, without any verification as to who we were.”
(Very dissatisfied)

Whereas, getting rid of ‘unnecessary’ or ‘inconvenient’ pre-flight security checks would increase the satisfaction of others who were currently ‘very’ or ‘quite’ dissatisfied with the personal security checks

“I consider that the wholesale imposition of a rather pointless exercise to further delay bona fide travellers in their business endeavours is a needless waste of taxpayer funds.”

(Very dissatisfied)

“I think for a domestic flight within NZ, the security measures are over the top. I am not a threat to an airplane!!! Also I find that security checks are not consistent between airports.”

(Quite dissatisfied)

“I find it embarrassing for other people and stupid that belt buckles, shoes, cell phones, jewellery and everything in ones pockets needs to be emptied. Huge delays, inconvenience. It is a ridiculous, time consuming and expensive exercise which in my opinion achieves nothing except for an invasion into peoples property. It is embarrassing to see people in wheelchairs frisked!”

(Very dissatisfied)

“After going through the security procedures correctly I was then singled out ('randomly', I was told..... yeah, right!) and gone over once again - I felt like a criminal. No need for the overkill.”

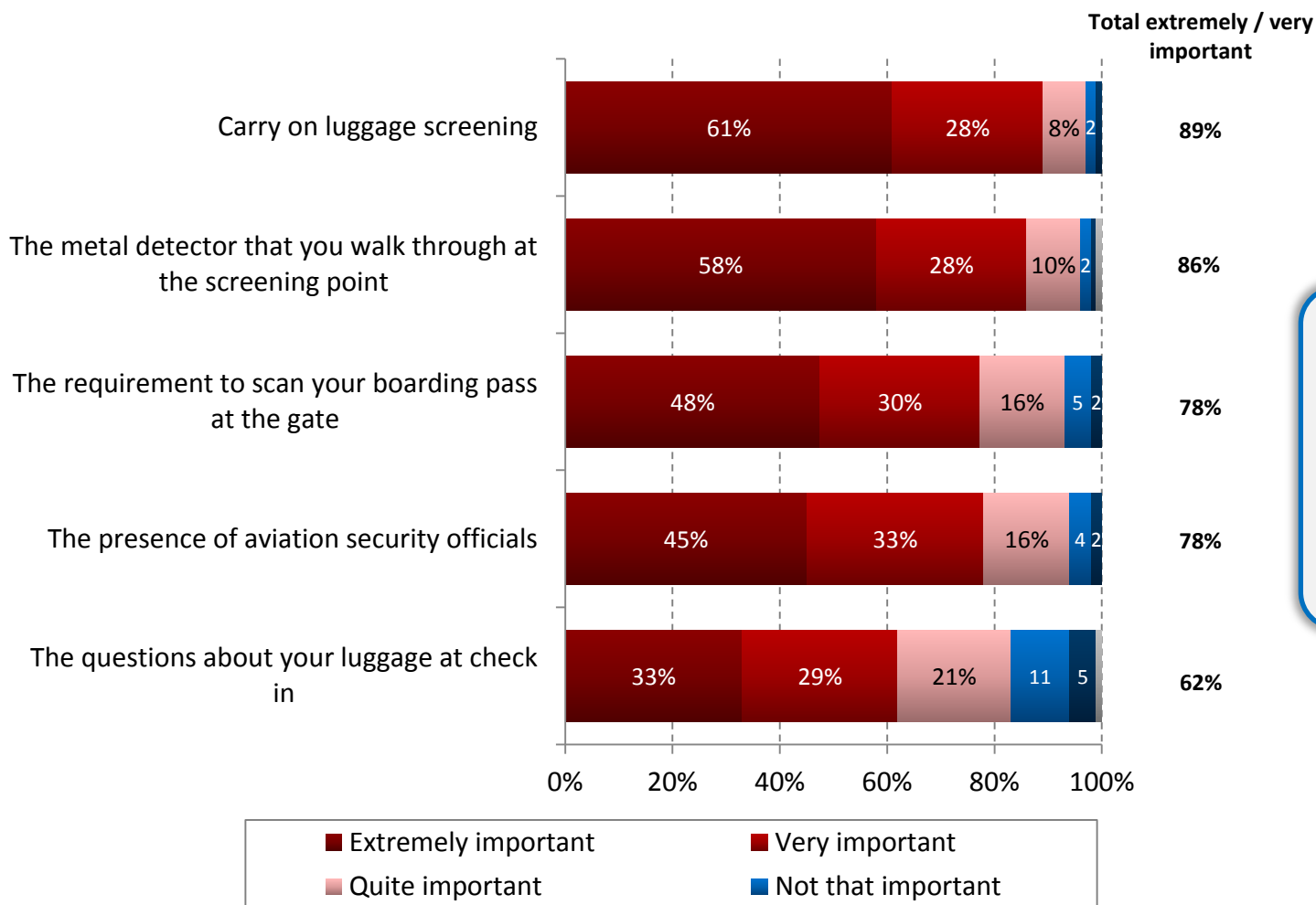
(Very dissatisfied)

“At Auckland Airport I get annoyed that I have to take off my steel cap corporate dress shoes and put them through the scanner, I don't have to do this in CHCH or any other national airport. The thing that really annoys me is that when you pass through the scanner and pick up your briefcase, stuff your laptop back in, reload your pockets and grab your shoes there is nowhere you can sit to enable you to put your shoes back on. I have mentioned this to staff and it obviously fell on deaf ears as nothing has been done and there is still no seating to put your shoes back on.”

(Very dissatisfied)

Perceived importance of security procedures

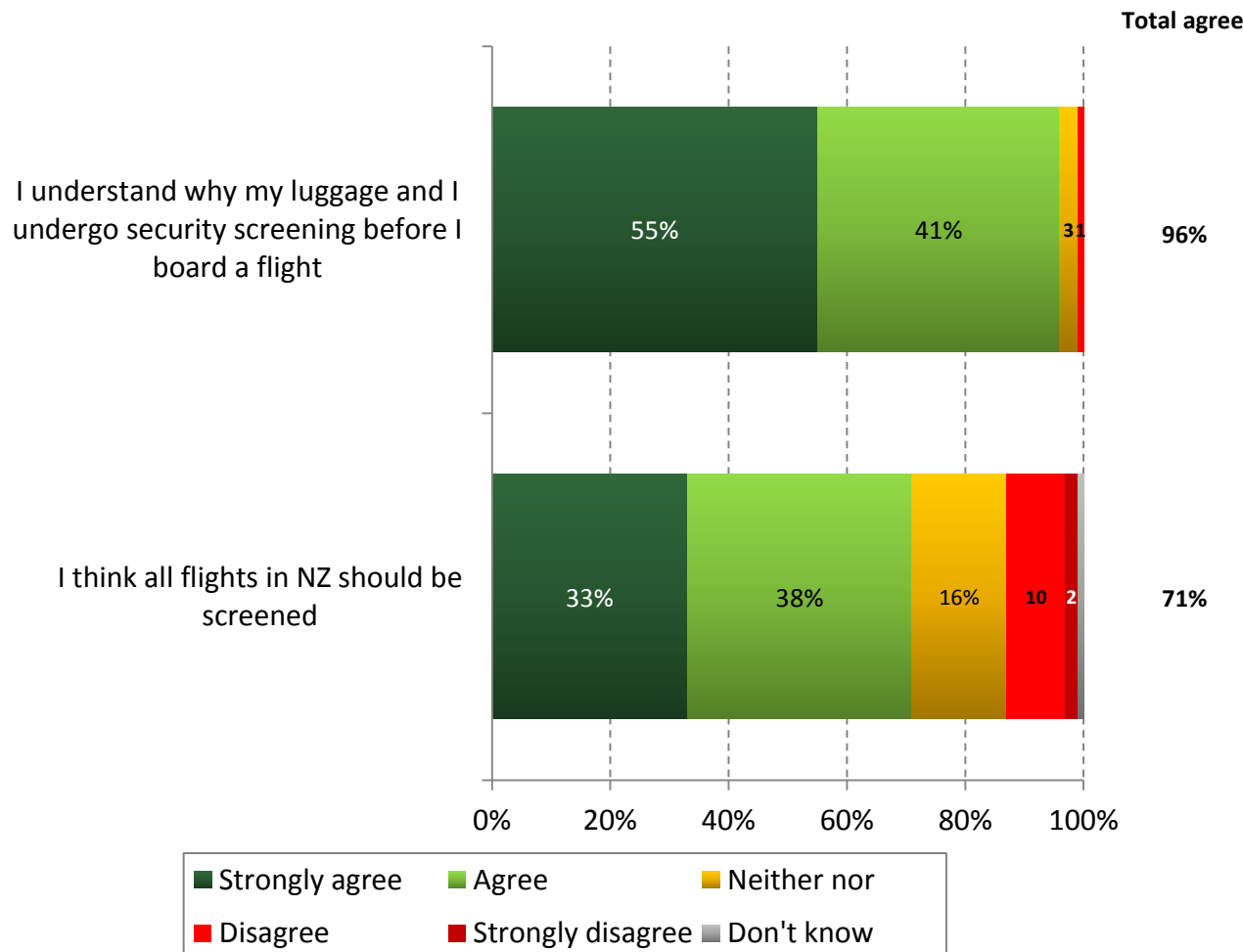
Q9a. The table below lists a number of security procedures that travellers often go through before they fly. Please indicate how important or unimportant you think each of these security procedures is in keeping people safe and secure when they fly.



Carry-on luggage screening, and the metal detector, are perceived to be the most important security procedures for resident travellers.

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

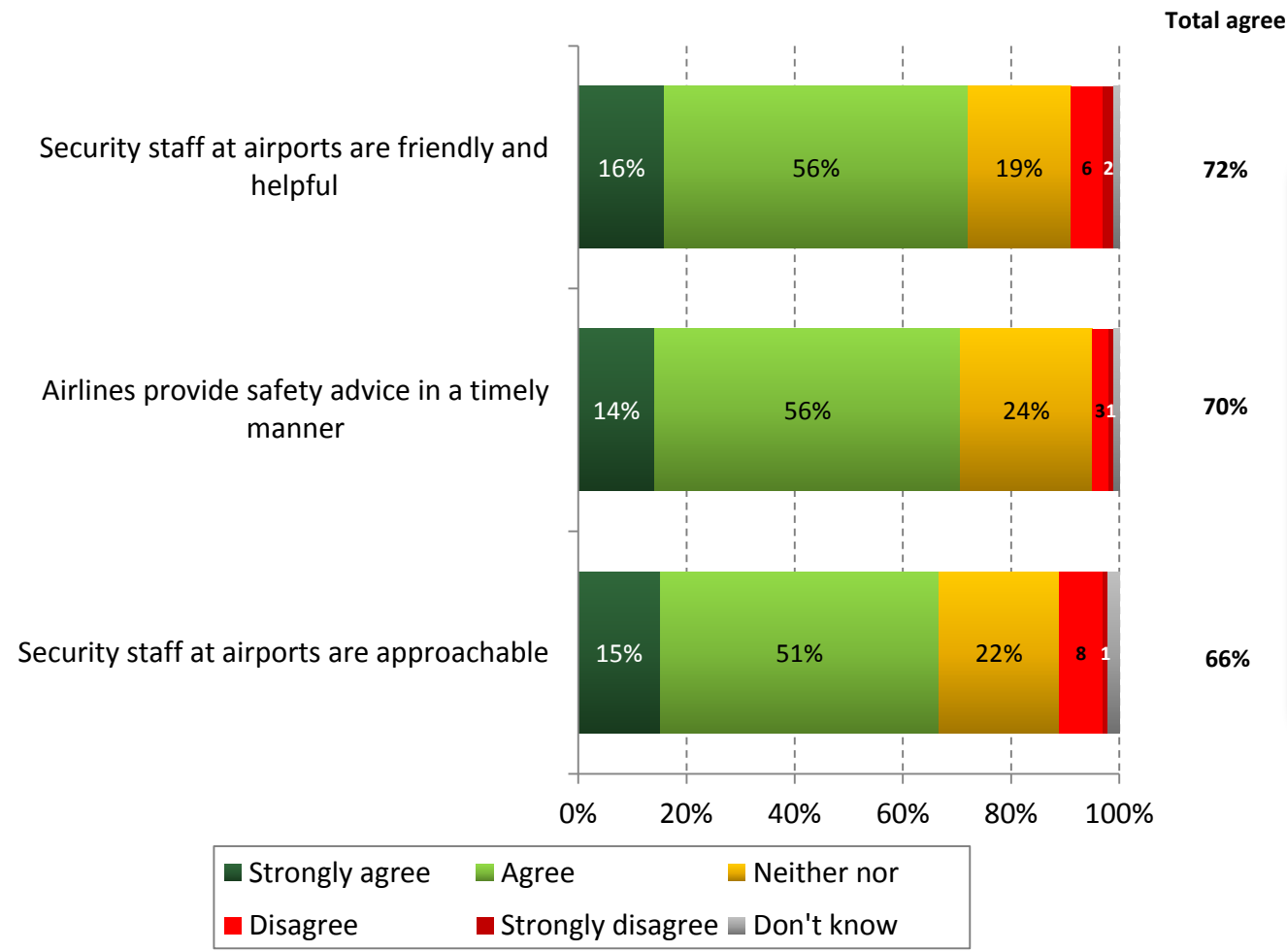
Q9b. Below is a set of statements that some people have made about air travel and security. Please indicate how much you agree or disagree with each statement.



The vast majority of resident travellers (96%) feel that they understand the importance of security screening. A sizeable majority (71%) believe all flights in New Zealand should be screened.

Perceptions of security staff and airline safety advice

Q9b. Below is a set of statements that some people have made about air travel and security. Please indicate how much you agree or disagree with each statement.

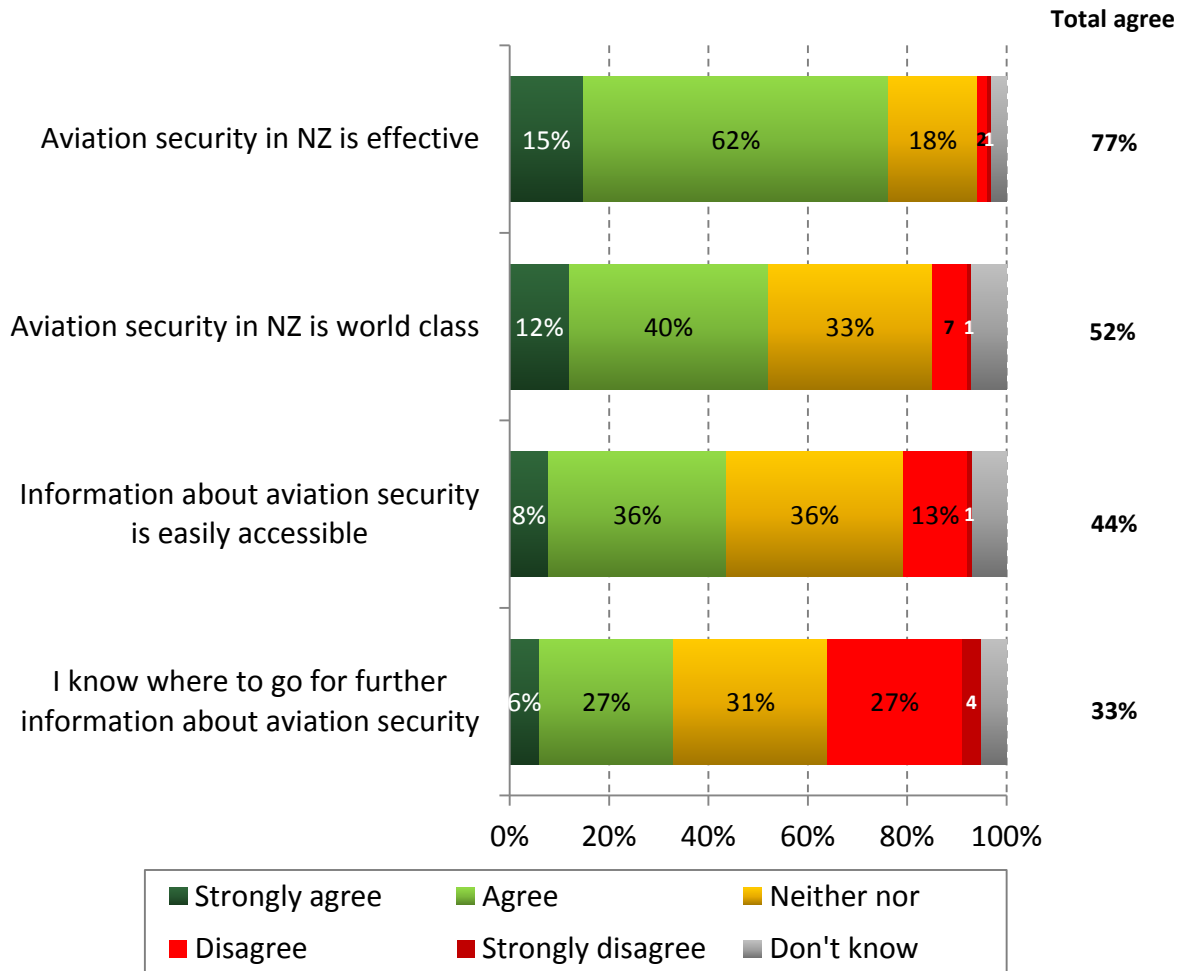


At least two thirds of resident travellers think that airport security staff are friendly and helpful, and approachable, as well as that airline safety advice is provided in a timely manner. Although positive, the strength of feeling associated with these factors is weak with few 'strongly' agreeing with the statements.

Around one in 11 passengers disagree that security staff are friendly and helpful or approachable.

General perceptions of aviation security in New Zealand

Q9b. Below is a set of statements that some people have made about air travel and security. Please indicate how much you agree or disagree with each statement.



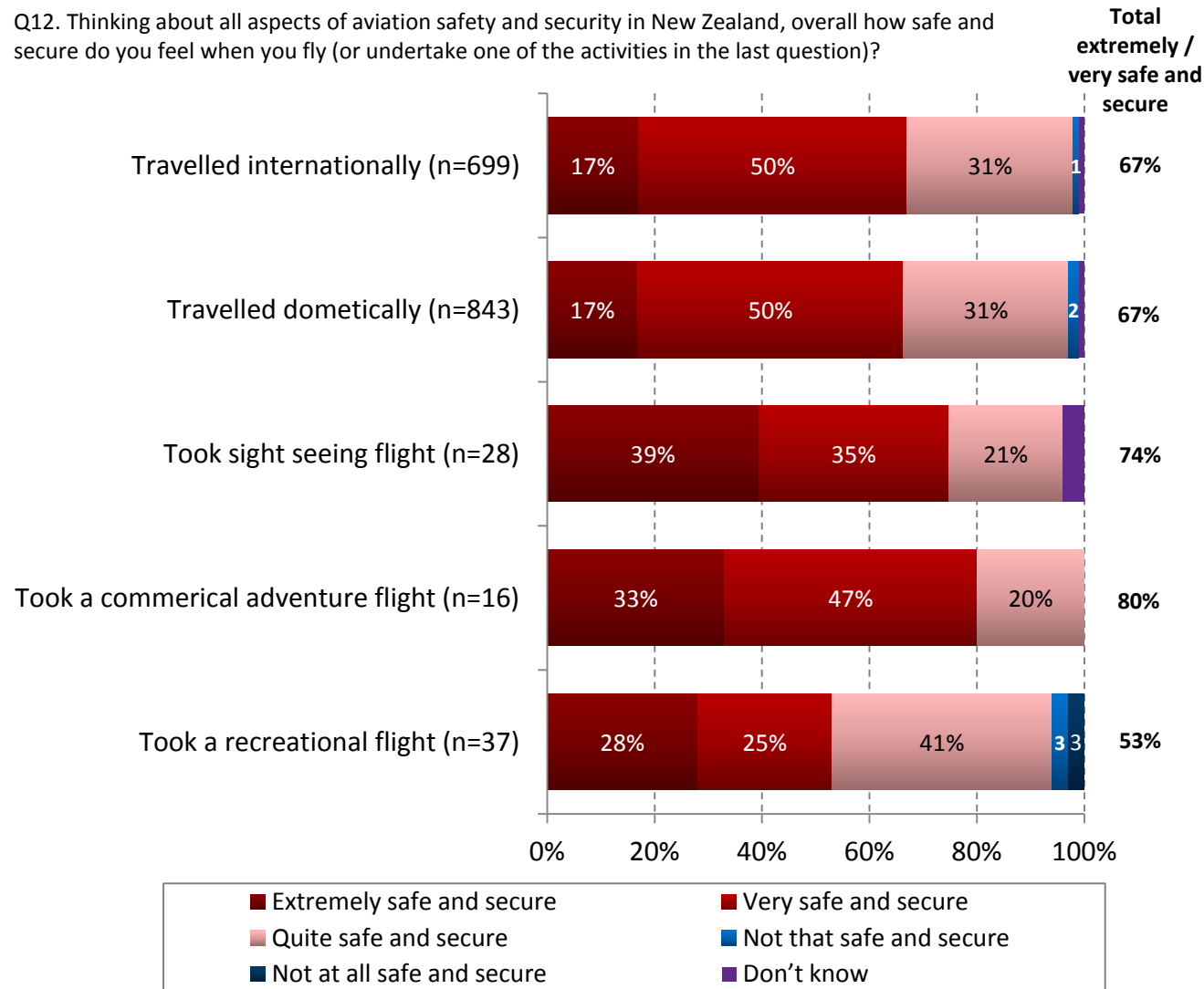
Around three quarters (77%) perceive aviation security in New Zealand to be effective and around half (52%) perceive it to be world class. Many were unable to offer an opinion on these matters.

A lack of knowledge is also evident with regard to information about aviation security – only minorities of resident travellers think information about aviation security is accessible or know where to go for it (44% and 33% respectively).

Households with children aged under 5 years are most likely to disagree that they know where to go for further information about aviation security (39%).

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

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)?



Taking into account all aspects of aviation safety and security, two thirds of resident travellers who have travelled internationally, and the same proportion of travellers who have travelled domestically, feel either 'extremely' or 'very' safe when they fly in New Zealand. This survey result is 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 respondents had just been asked to consider the risk associated with other aviation activities (such as parachuting, flying in a microlight etc) immediately before being asked this question.

Results among those who have taken sight seeing flights, commercial adventure flights or recreational flights are based on small sample sizes. Nevertheless, majorities of these travellers also feel either 'extremely' or 'very' safe when flying in New Zealand.



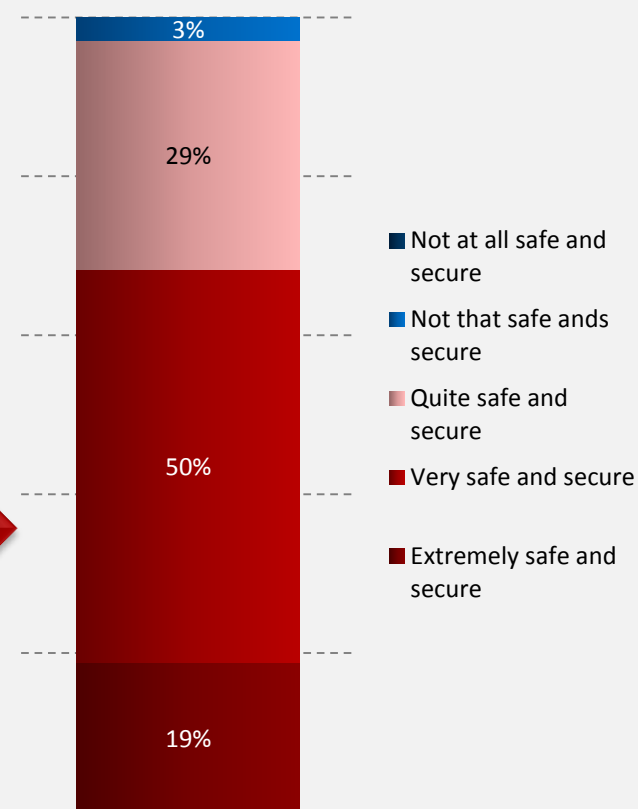
Perceptions of sky diving

Key results

- 10% of resident travellers have been sky diving in New Zealand.
- Three quarters (75%) of sky divers associate the activity with some level of risk.
- Those who have never been sky diving in New Zealand consider it to be much more risky.
- 69% of those who have been sky diving feel extremely or very safe and secure about flying and undertaking aviation activities in New Zealand.

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



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	Have sky dived (n=94)	Have not sky dived (n=924)
Extremely / Very risky	28%	49%
Quite risky	47%	38%
Not that / Not at all risky	27%	13%

For those who have sky dived (n=94)



Perceptions of recreational flying

Key results

- 17% of resident travellers have been recreational flying in New Zealand.
- Around one third (34%) of those who have been recreational flying associate the activity with some level of risk.
- Those who have never been recreational flying in New Zealand consider it to be much more risky.
- 50% of those who have been recreational flying in New Zealand feel extremely or very safe and secure about flying and undertaking aviation activities in New Zealand.

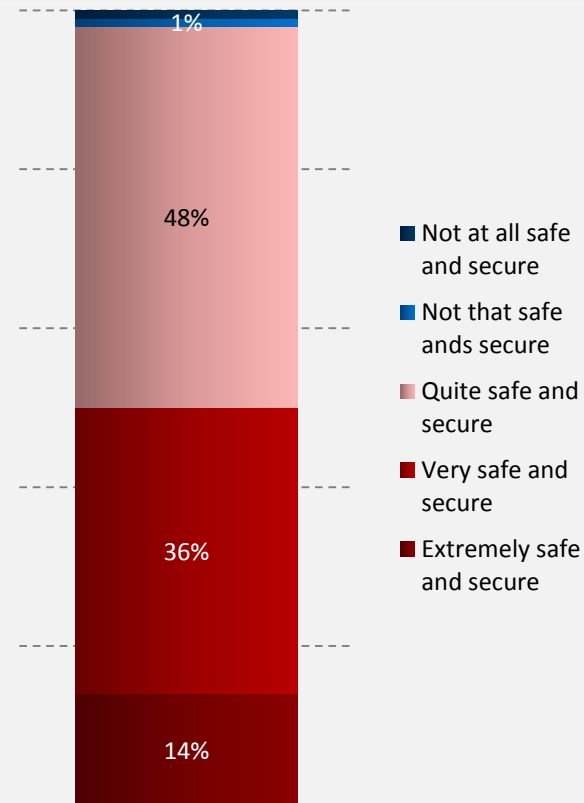
Q13. Please indicate how risky you think each of these activities is to the personal safety of the people that undertake them?

Perceived risk of recreational flying	Have flown recreationally (n=173)	Have not flown recreationally (n=837)
Extremely / Very risky	7%	21%
Quite risky	27%	38%
Not that / Not at all risky	66%	41%

For those who have flown recreationally (n=173)

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





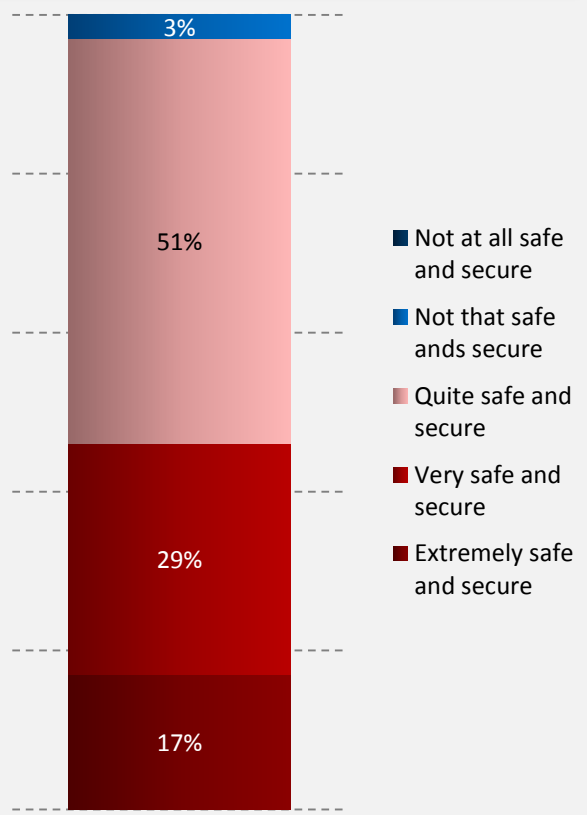
Perceptions of gliding

Key results

- 7% of resident travellers have been gliding in New Zealand.
- Only one third (30%) of those who have been gliding associate the activity with some level of risk.
- Those who have never been gliding in New Zealand consider it to be much more risky.
- 46% 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.

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



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	Have glided (n=71)	Have not glided (n=939)
Extremely / Very risky	12%	30%
Quite risky	18%	41%
Not that / Not at all risky	68%	29%





Perceptions of flying in a microlight

Key results

- Just 3% percent of resident travellers in this survey have flown in a micro light in New Zealand.
- 60% of those who have flown in a microlight associate the activity with some level of risk.
- Those who have never flown in a microlight in New Zealand consider it to be much more risky.
- 50% 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.

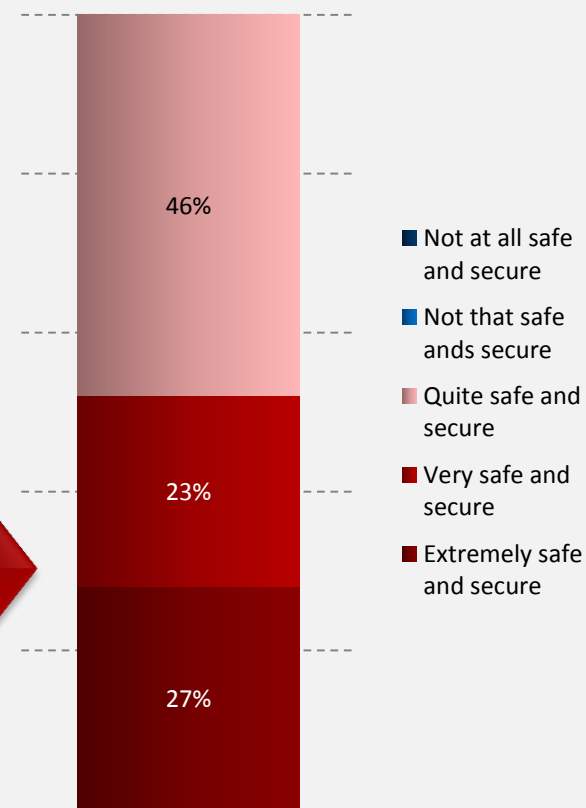
Q13. Please indicate how risky you think each of these activities is to the personal safety of the people that undertake them?

Perceived risk of microlight	Have flown in a microlight (n=25)	Have not flown in a microlight (n=974)
Extremely / Very risky	24%	46%
Quite risky	36%	38%
Not that / Not at all risky	41%	16%

For those who have flown in a micro light (n=25)

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 those who have flown in a microlight feel when flying or undertaking aviation activities in New Zealand





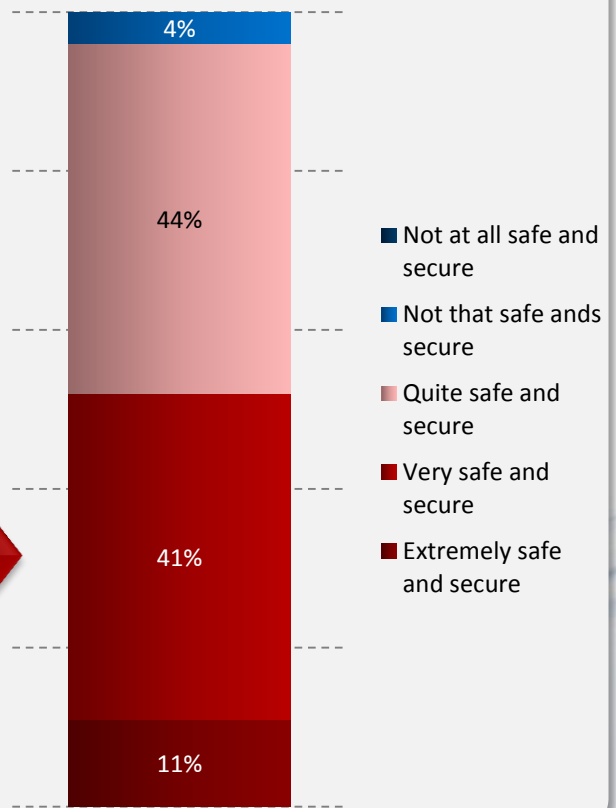
Perceptions of paragliding/hang gliding

Key results

- Just 5% of the resident travellers in this survey have been paragliding or hang gliding in New Zealand.
- 74% of those who have been paragliding or hang gliding in New Zealand associate these activities with some level of risk.
- Those who have never been paragliding or hang gliding in New Zealand consider it to be much more risky.
- 52% 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.

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 paragliders/hang gliders feel when flying or undertaking aviation activities in New Zealand



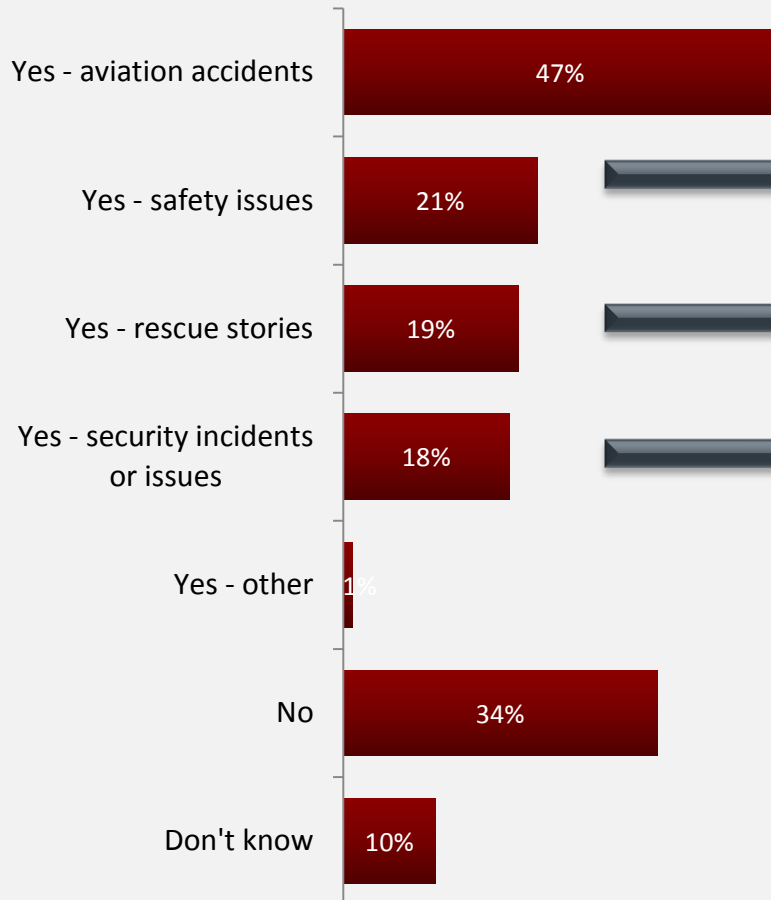
Q13. Please indicate how risky you think each of these activities is to the personal safety of the people that undertake them?

Perceived risk of paragliding /hang gliding	Have para glided/ hang glided (n=48)	Have not para glided/ hang glided (n=968)
Extremely / Very risky	29%	48%
Quite risky	45%	41%
Not that / Not at all risky	24%	11%



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?



75% of respondents saw or read about safety issues in the newspaper

94% of respondents saw or heard about a rescue story on TV news

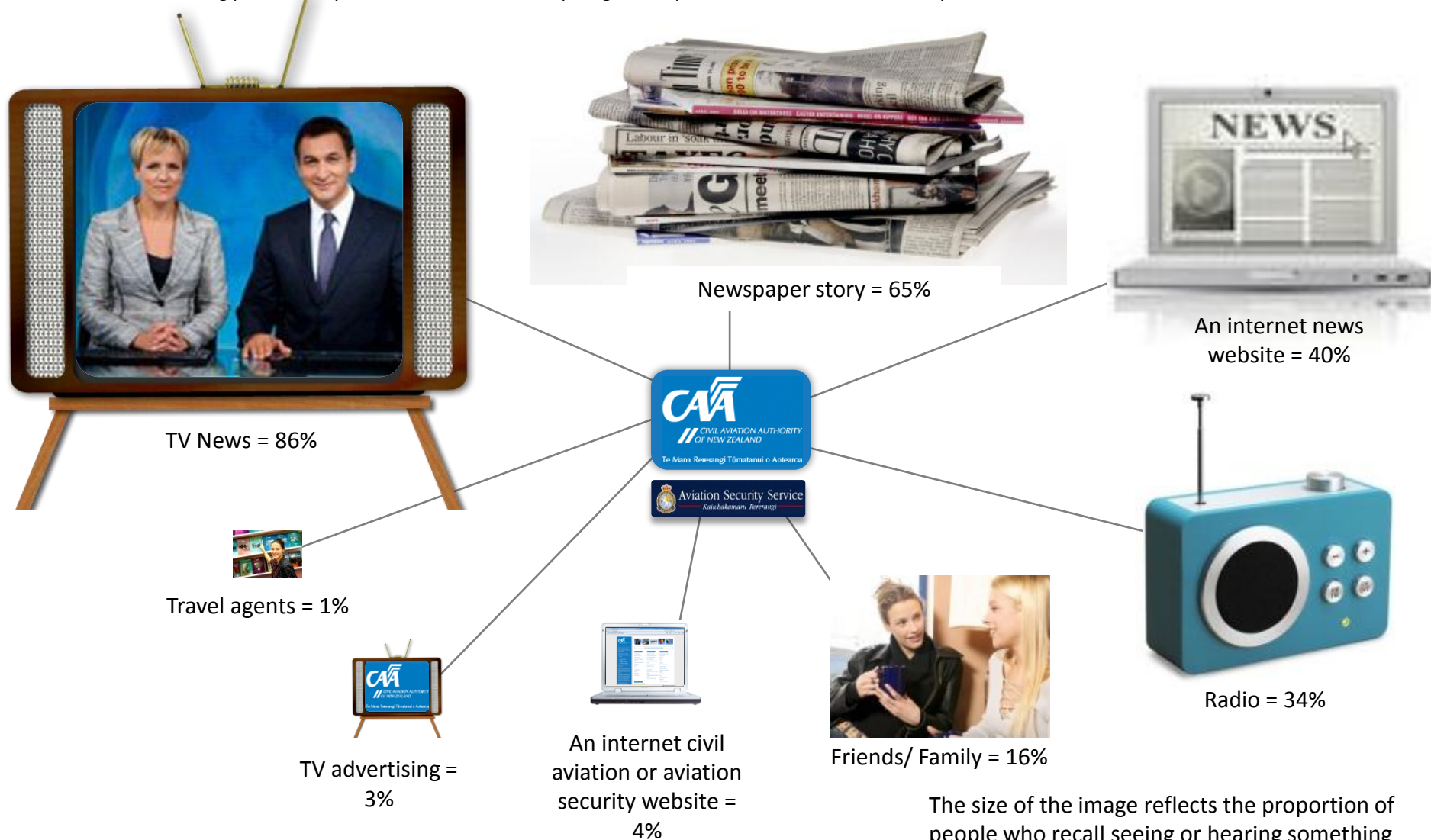
74% of respondents saw or read about security incidents or issues in the newspaper

Over half recall media coverage of civil aviation safety and security. TV news stories and newspaper articles are the most common places to see, hear, or read about civil aviation and security



Source of information about civil aviation and security in New Zealand

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



The size of the image reflects the proportion of people who recall seeing or hearing something about civil aviation and security.

Base: Respondents who have seen, heard or read anything about civil aviation and security recently (n=585)



CIVIL AVIATION AUTHORITY
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Aviation Security Service

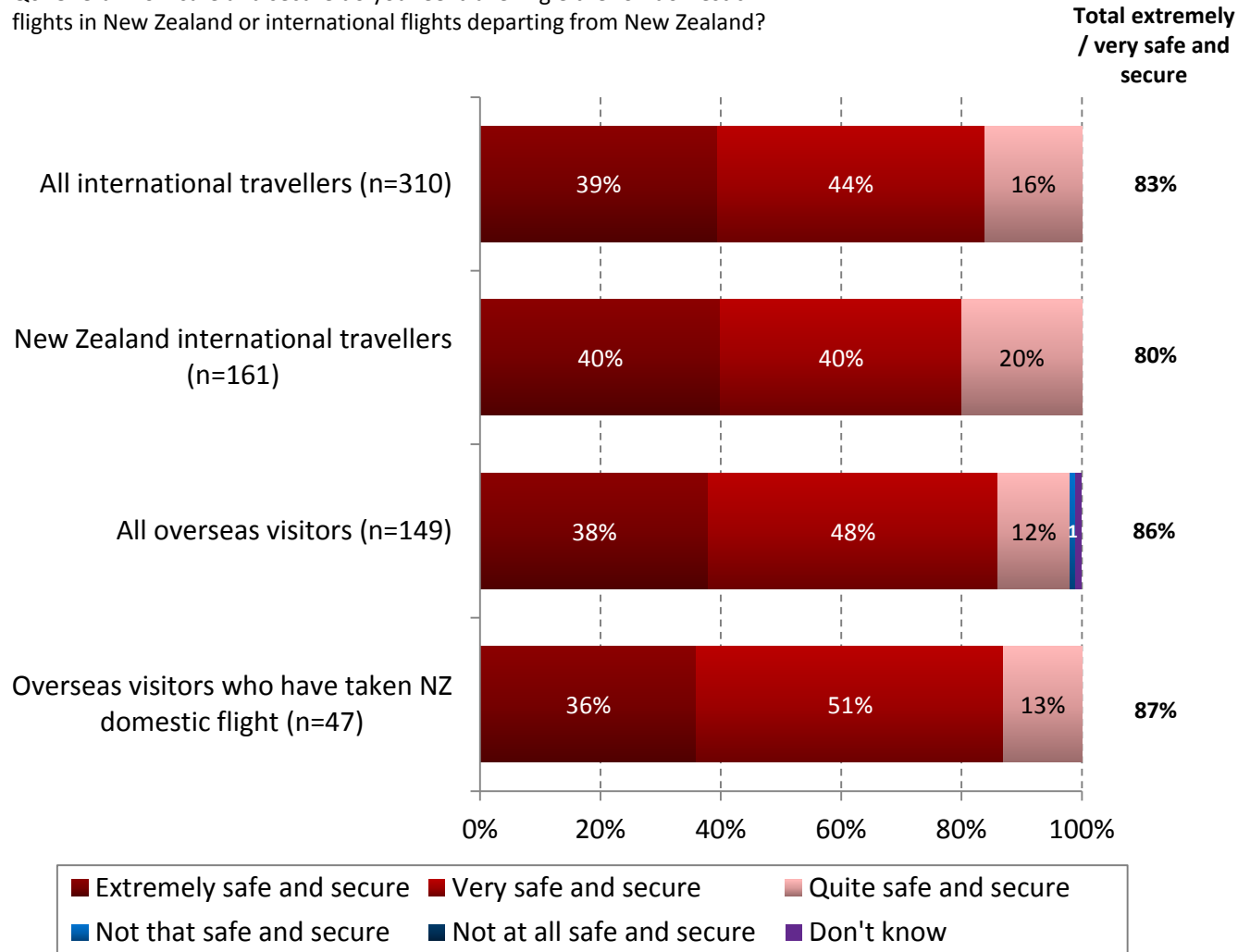
Kaiwhakamau Rererangi



International traveller survey results

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

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

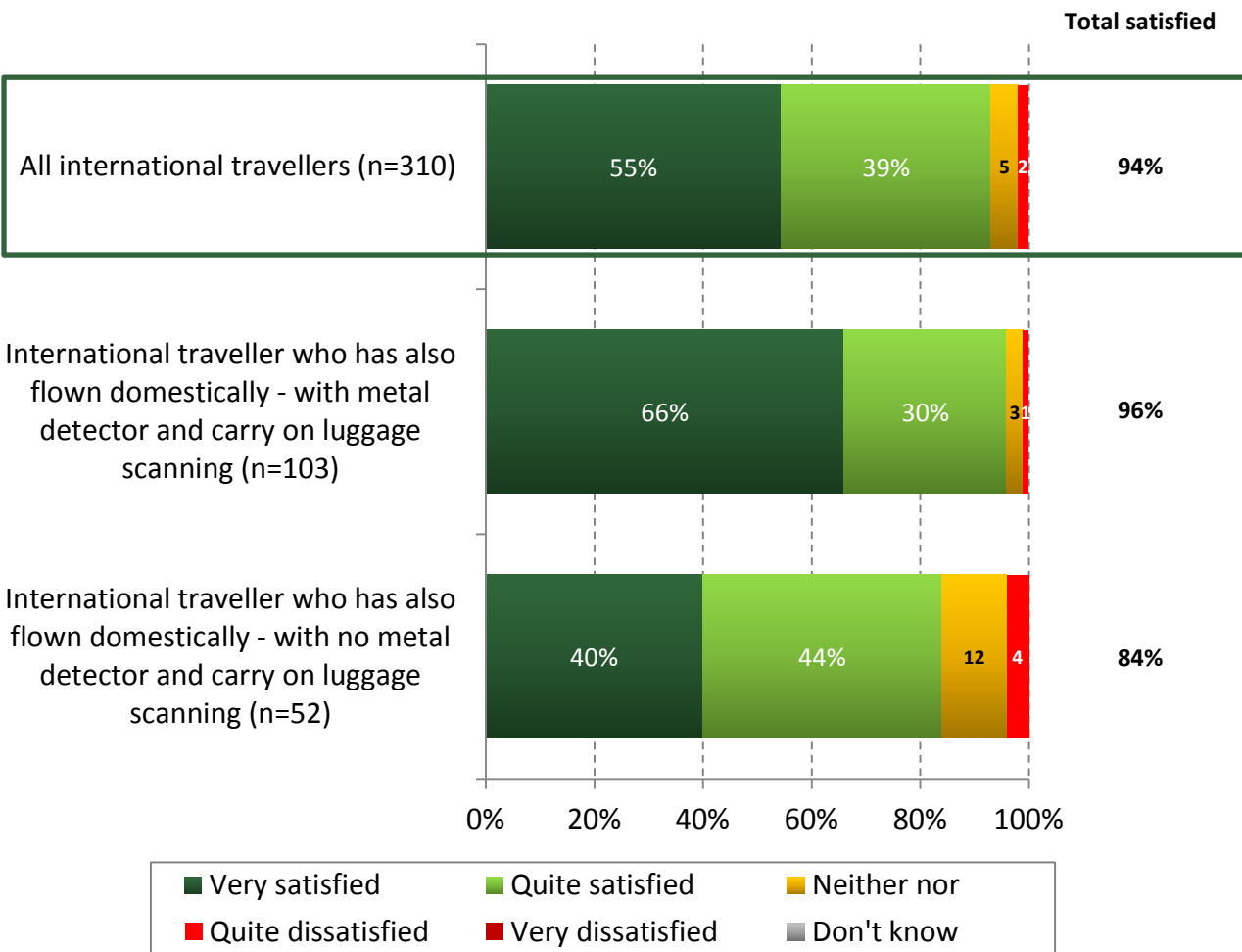


A very large majority (83%) of international travellers feel extremely or very safe and secure on domestic flights in New Zealand or international flights departing from New Zealand.

Overseas visitors to New Zealand are especially positive in their rating of this (86% feel either extremely or very safe and secure). Whether or not the overseas visitor also flew domestically within New Zealand does not have a significant bearing on the results.

Overall perceptions of security checks at New Zealand airports

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?



The vast majority (94%) of international travellers were either very or quite satisfied that the security measures they've experienced at New Zealand airports would keep them safe and secure for the duration of the flight.

International travellers who have flown domestically in New Zealand where there was no metal detector or carry on luggage scanning exhibit notably lower satisfaction levels.

Suggestions to increase travellers' satisfaction with personal security checks

*"I think they should have it earlier on in the airport than they do - before the cafes and stuff. It should be straight after you check in. The idea is for airport and flight security."
(UK female aged 18 to 24 years)*

*"That your luggage is scanned with the traveller before departure. I mean they scan the carry on baggage but don't scan suitcases. They probably do scan them, but it's not with the traveller."
(Australia female aged 55 to 64 years)*

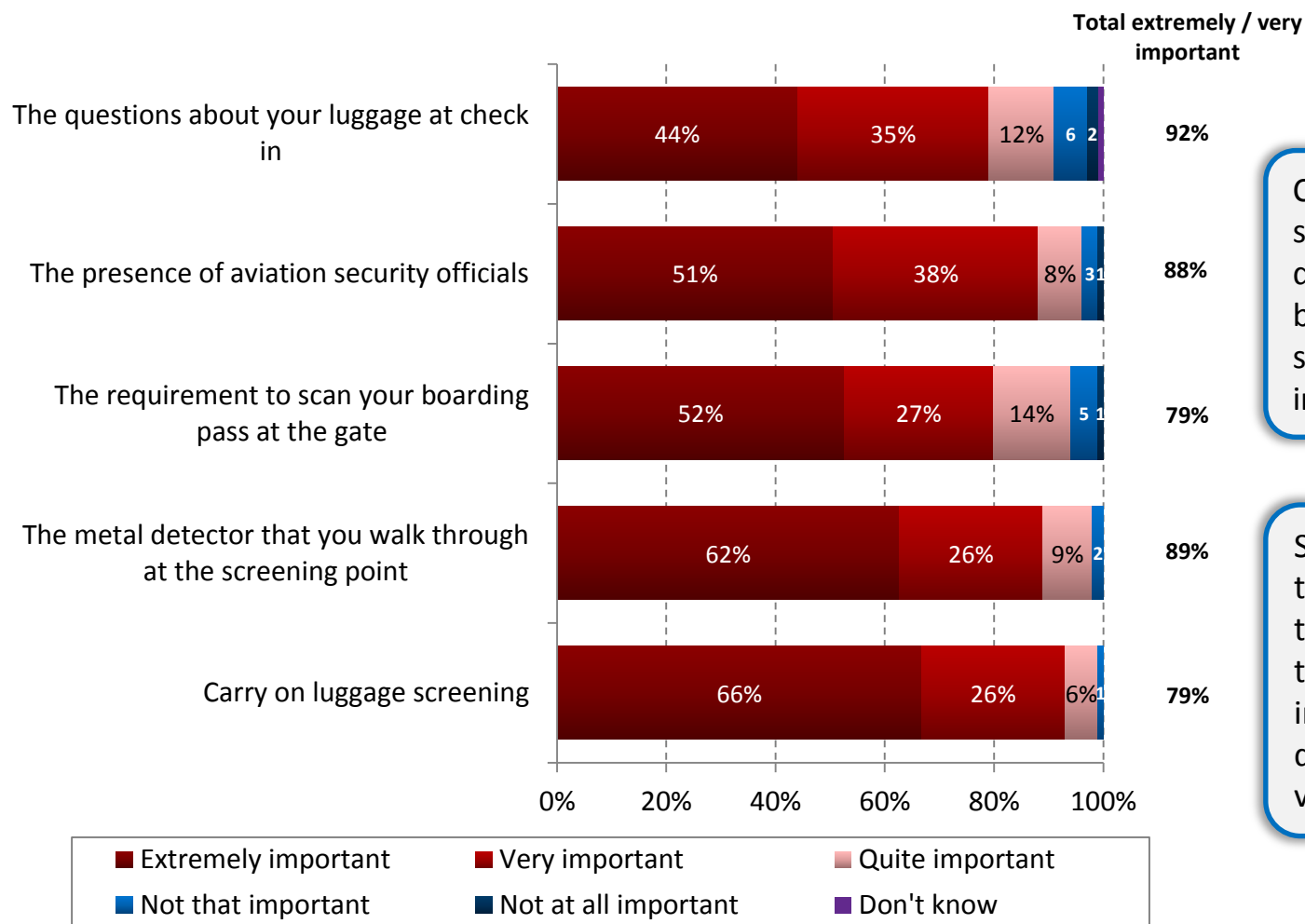
*"When I was at the security point, the security officer was very rude. I had an electronic dictionary in my bag and he wanted check it. However, he tried to get everything out of my bag and commanded me to show how to use it. He spread all my personal belongings on the counter and just walked away without saying 'thank you'. That was a shocking incident!"
(NZ female aged 55 to 64 years)*

*"Do away with ludicrous standardised rules regarding liquids, knitting needles, etc that rely on blanket-security measures which bear no relation to real risk. Tiny nail scissors, a bottle of perfume, and my embroidery needles do not constitute a real threat and I find it offensive that tracking and scanning devices are bought and used without need while people are waiting for cancer scans. We should not be slavishly following United States neurotic dictates, but forming our own evidence based processes which are suitable for our circumstances."
(NZ female aged 55 to 64 years)*

*"I came from Napier airport this morning. They didn't check my hand luggage at all. I could have been carrying a knife. Even if they just lifted up the top stuff in my hand luggage like at a department store check. It's a small airport, but for them to do nothing... they don't even ask questions about what's in your carry-on luggage. They just asked questions about what you had packed in the plane luggage. Just the standard aerosol and inflammable stuff questions. I don't think it's necessary for them to screen your hand luggage, but just to lift the top stuff so you can see what's in the bottom."
(NZ female aged 25 to 34 years)*

Perceived importance of security procedures

Q8. The table below lists a number of security procedures that travellers often go through before they fly. Please indicate how important or unimportant you think each of these security procedures is in keeping people safe and secure when they fly.

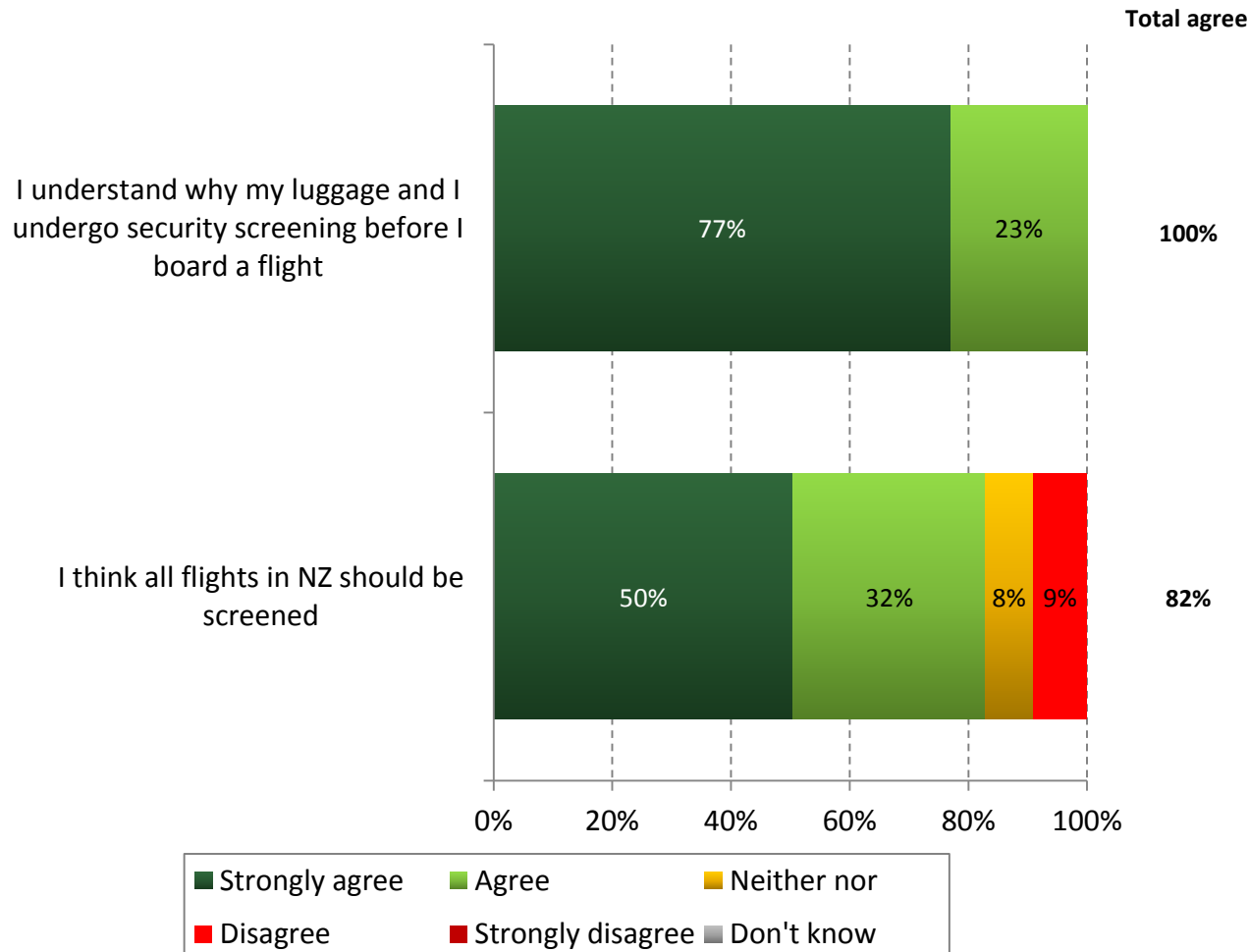


Carry-on luggage screening, and the metal detector, are perceived to be the most important security procedures for international travellers.

Sub-group analysis shows that NZ international travellers are more likely to think it is extremely important to have metal detectors than overseas visitors (67% versus 56%)

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

Q9. I am going to read out some statements that some people have made about air travel and security in New Zealand. Please indicate how much you agree or disagree with each statement.

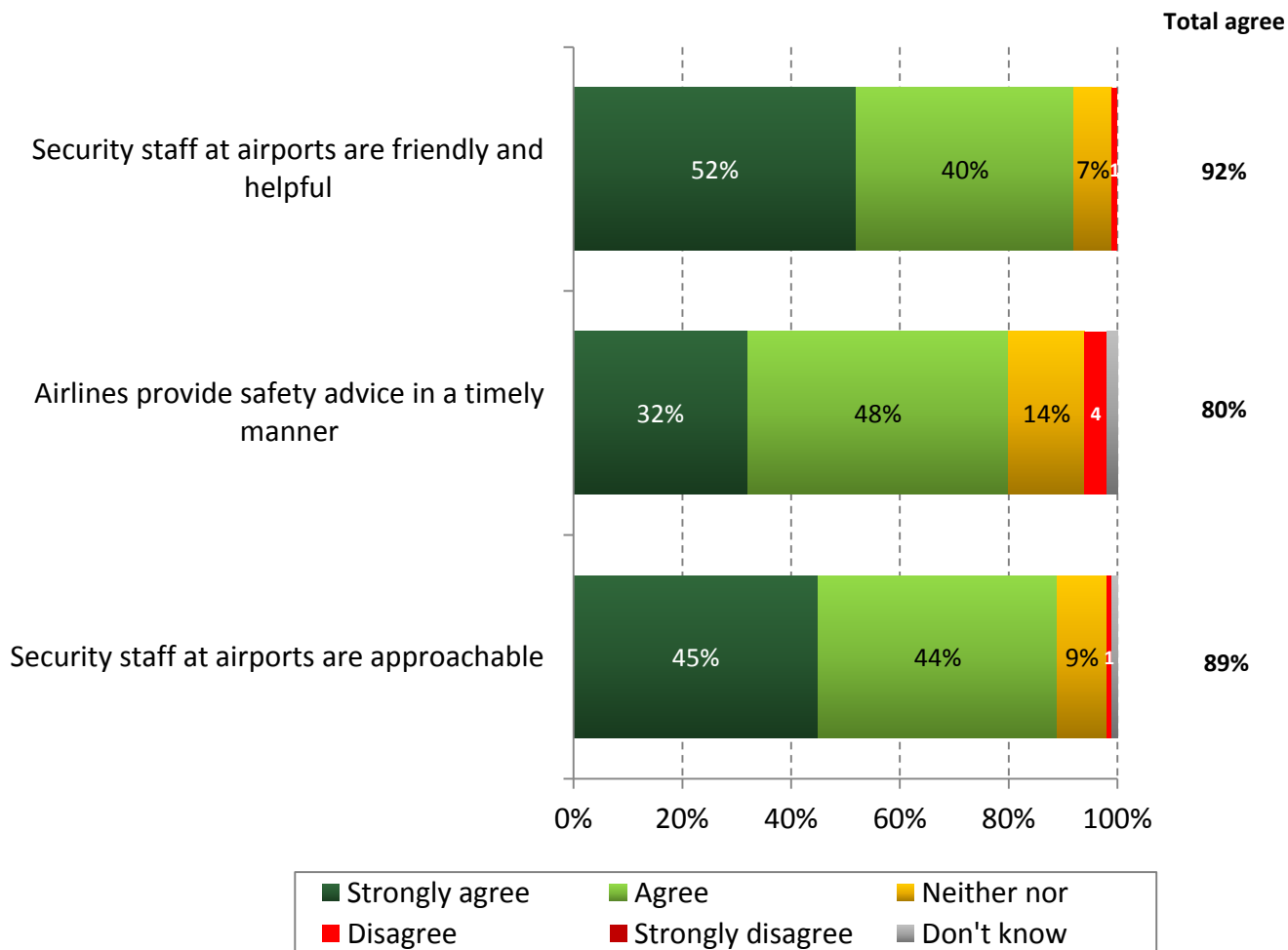


All international travellers in this survey felt that they understand the importance of security screening. A large majority (82%) believe all flights in New Zealand should be screened.

Overseas visitors are more likely than NZ international travellers to strongly agree that all flights in NZ should be screened (57% versus 43%).

Perceptions of security staff and airline safety advice

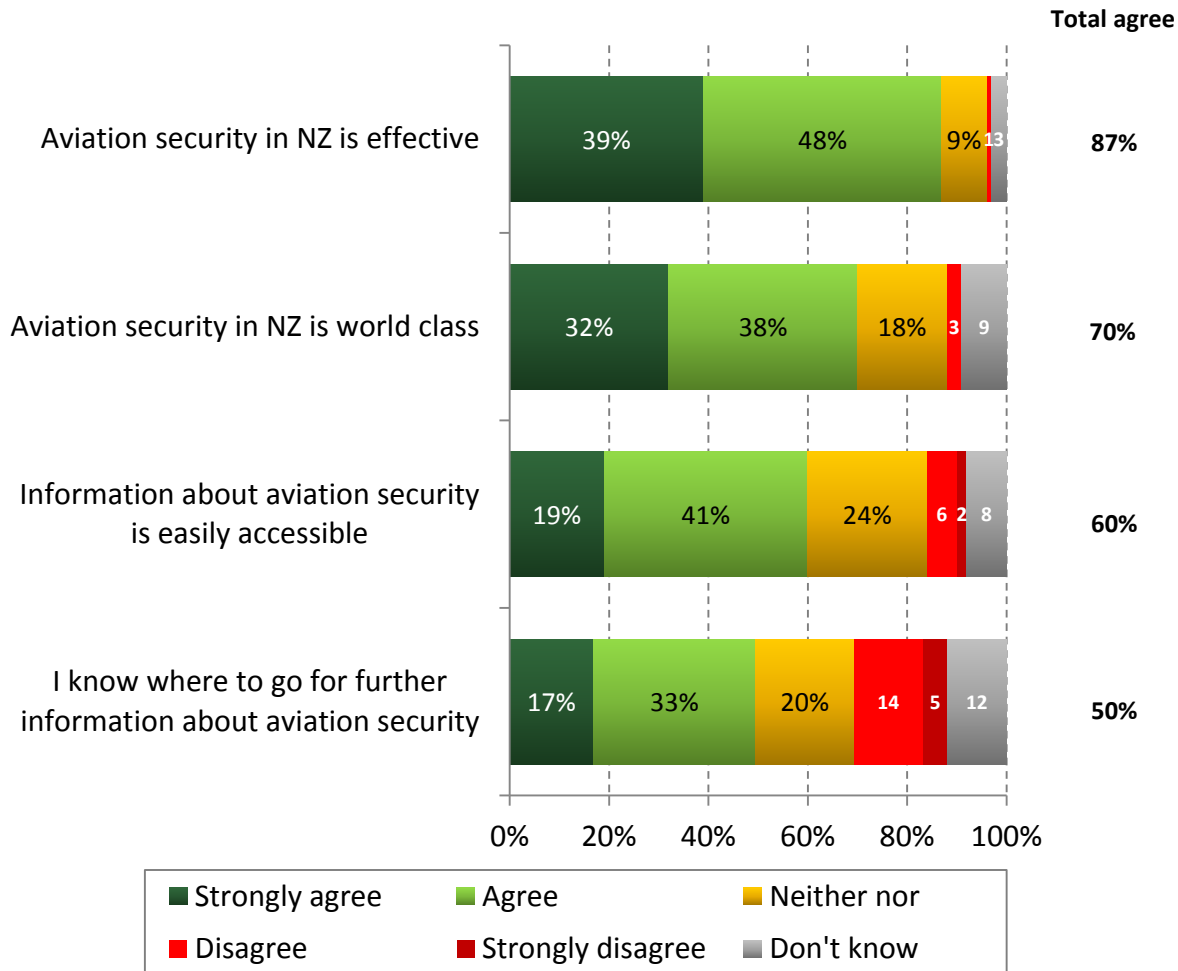
Q9. I am going to read out some statements that some people have made about air travel and security in New Zealand. Please indicate how much you agree or disagree with each statement.



International travellers rate all of these aspects positively, with especially high proportions agreeing that security staff at New Zealand airports are friendly, helpful and approachable.

General perceptions of aviation security in New Zealand

Q9. I am going to read out some statements that some people have made about air travel and security in New Zealand. Please indicate how much you agree or disagree with each statement.

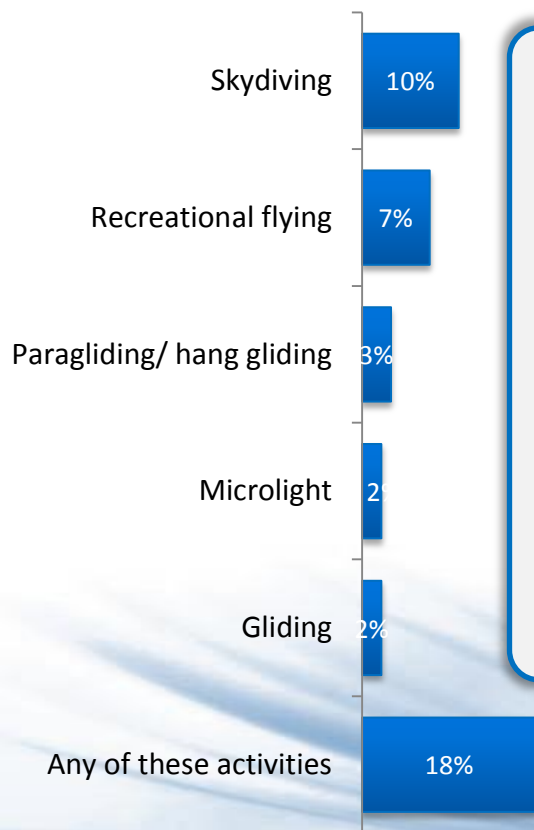


International travellers' perceptions of aviation in security are generally very positive with large majorities perceiving New Zealand aviation security to be effective and world class. Less than two thirds of international travellers believe information about aviation security is easily accessible. Only half know where to source further information about aviation security. However, all of these results are markedly more positive than those for resident travellers (provided earlier in the report).

Adventure and recreation aviation activities

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

Aviation activities international travellers have undertaken in New Zealand



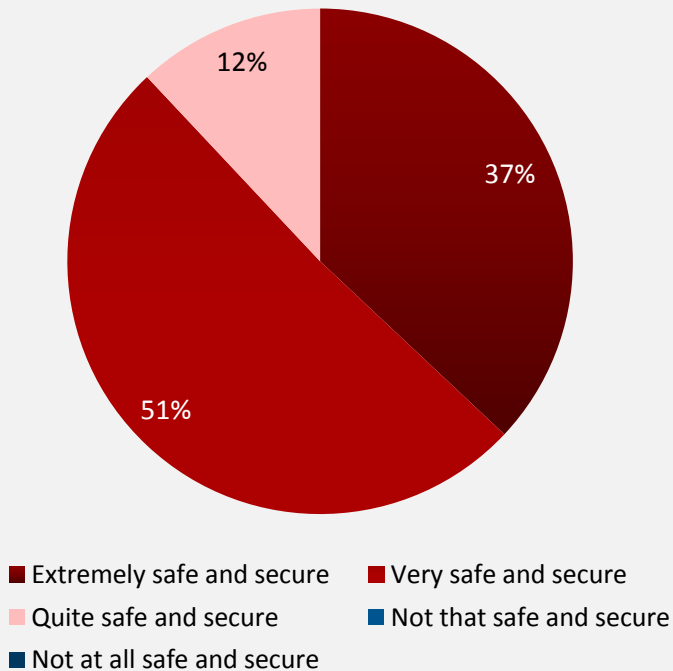
Sky diving and recreational flying are the most common adventure/recreational aviation activities that international travellers have undertaken in New Zealand.

Among those international travellers that have undertaken at least one of the five adventure/recreational aviation activities, a very large majority (88%) feel extremely or very safe and secure when they fly or undertake one of these aviation activities.

For those who have done any of these (n=57)

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



Base: Undertaken either sky diving, paragliding/ hang gliding/ microflight/ gliding or recreational flying (n=57)



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Aviation Security Service

Kaiwhakamau Rererangi

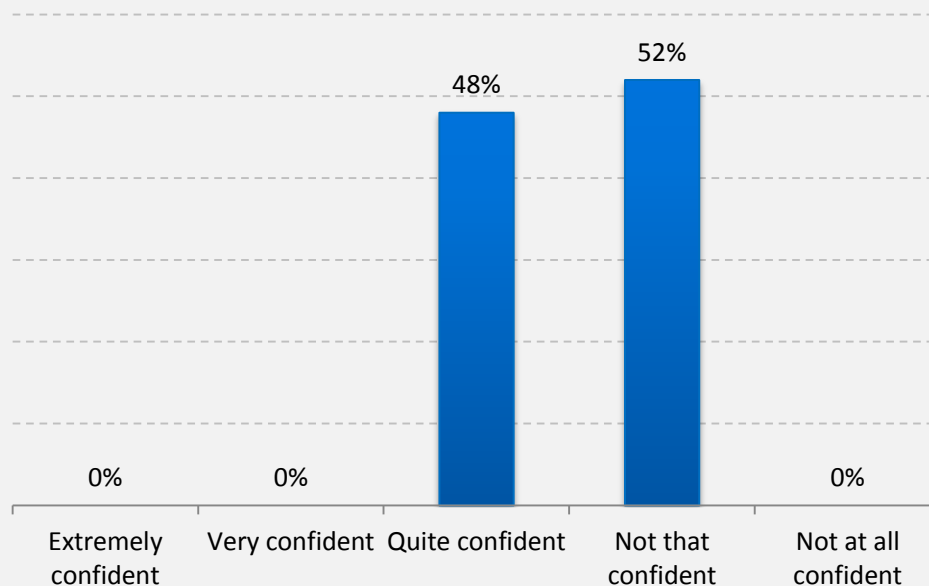


Stakeholder survey results

Care should be taken in interpreting these results due to the small sample size (n=27)

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.

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?



Stakeholders' confidence in the management of CAA to provide effective safety and security measures for the aviation industry in New Zealand is weak with around half saying they are 'quite confident' (48%) and half saying they are 'not that confident' (52%).

Stakeholders' reasons for these confidence ratings relate to perceptions that the CAA has slow response times and a lack of resources, is constrained by rigid rules and regulations resulting in ineffectiveness, is a reactive organisation which lacks a proactive attitude, lacks industry knowledge and expertise, and lacks leadership. Verbatim quotes are provided on the following charts.

Slow responses and lack of resources...

“The main issue is the slow response to the ICAO Safety Management Systems Implementation. This appears to be running at least two years late. While there has been consistent messages from the Director on the proposed direction the CAA will take, there has been no Rule or AC activity to provide some certainty to the Aviation Industry.” (Industry body, ‘quite confident’ in management of CAA)

“Technical competence is generally good. However, often resource constraints limit responsiveness and the ability to maintain strong open two way flows of communication between all participants and the CAA to ensure fast and effective resolution of potential issues and opportunities to enhance the system and standards of safety operating within the region.” (Large operator within the industry, quite confident in management of CAA)

“The lack of decision making in a timely manner requires to be questioned. Waiting for an answer for up to 12 months is unacceptable from a Regulatory Authority. All too often the industry is faced with frustration, and very time consuming processes through departmental procrastination and lack of unified consultation and reasoning. There are reasons presented about why things can’t be done, but very few positives about moving forward. The often used excuse is that it will require a Rule change, or we can’t do that from the inside. From a commercial point of view, the overall output is too low, with the reasoning often being given that the resource level is too low. Viewing the regularly issued CARRILs will show this comment at times.” (Air consulting and management organisation, ‘not that confident’ in management of CAA)

“CAA is under staffed and staff morale is low. Undue distractions caused by the Auditor General’s report are distracting CAA from core functions. Examples are the re-entry processes for existing certificate holders. The process is unduly convoluted, wasting staff time. Other examples include pedantic rule interpretations by CAA staff that have no safety benefits where simple educational tools could be used to affect an outcome.” (Small helicopter operator, ‘not that confident’ in management of CAA)

CAA's effectiveness is constrained by rigid rules and regulations

"Because they are constrained by blanket perceptions, political correctness, and a magnified aversion to legal procedures and so seem unable or unwilling to use morally right, practical measures to define and combat whatever threat might arise from time to time." (Industry body 'not that confident' in management of CAA)

"Focus is on compliance and certification rather than competence, i.e. instructor ratings – we now have kids teaching kids that have no experience of flying in an operational environment which requires them to make their own decisions, but they comply." (Operational agency, industry body, small operator within industry, 'not that confident in management of CAA)

"CAA seems to be all about rule making and bureaucracy rather than showing any skills in running a business. They may well employ competent staff in safety and security, but being successful is more than having staff. You need good policies and systems and I have not seen evidence of these. Also a concern is that although they consult, they do not necessarily listen to the responses, and do not appear to treat parties equally or fairly." (Part 149 organisation, 'not that confident' in management of CAA)

"The current auditing process (maintenance) appears to focus on the larger certificated companies (revenue). The auditing process appears to be of the 'tick box' type without actually assessing the end product. That is, a missing decal will result in a finding whereas we are continually identifying poor maintenance, poor maintenance practices and unapproved repairs. There appears to be a wide range of interpretation of NZCAA rules within CAA staff members." (Maintenance provider, 'not that confident' in management of CAA)

A reactive organisation, which lacks a proactive attitude

“NZAA are now a reactive organisation as compared to a proactive one as they were several years ago and as a result are no better than auditors and I believe that they contributed little to the safety environment within the aircraft and helicopter maintenance industry. Ticking boxes on audits does not show the true health of the industry.” (Larger operator within industry/aviation maintenance and sales, ‘not that confident’ in management of CAA)

“There appears to be a lot of reactive policy making following Coroner Inquests. A lack of Industry input and expertise being sort when these policy changes are made. Examples: Air Adventures and Murchison Helicopter Accidents.” (Operational agency, ‘quite confident’ in management of CAA)

“There is in my view little or no proactive ‘can do’ attitude within CAA. Many industry people enter CAA with great intentions and leave disillusioned. It is easy to be safe by not doing anything. We have experienced comments like ‘do you really think this capability is needed in NZ?’ CAA is inhibiting growth within the NZ aviation industry. They do not listen or consult with industry enough. They are way to slow in getting full alignment with the major Authorisations i.e. FAA, EASA. We should be accepting FAA and EASA certification, approvals, data, in every respect without question, and pleading with them to accept ours. Our industry would in my view be better served by us being regulated by the FAA than by the current NZCAAFAA or EASA certification are the benchmarks by worldwide standards. NZCAA certification is very limited with regards to its international acceptance.” (Large operator within the industry, ‘not that confident’ in management of CAA)

“CAA has not been very proactive in developing or updating safety policy and allocating priorities in recent years. Staff skills have fallen behind requirements.” (Industry body, ‘quite confident’ in management of CAA)

A lack of industry knowledge and expertise...

“Lack of resources, lack of industry knowledge in some areas.” (Monitoring and control agency, operational agency and industry body, ‘not that confident’ in management of CAA)

“I operate in the Skydiving industry and do not believe that the CAA has adequate in-house expertise to promulgate new regulation for the descent phase of this industry. Industry input on the Part 115 NPRM has largely been ignored.” (Small operator ‘quite confident’ in management of CAA)

“CAA senior management does not have a good understanding of the aviation recreational sector and tends to adopt a ‘one size fits all’ approach to rulemaking without regard to relative safety risks.”
(Part 149 organisation, ‘quite confident’ in management of CAA)

“Effective safety outcomes rely on a regulator and industry working closely together. This will be achieved with well designed, effectively run safety initiatives and open communication channels. The CAA does this well in some areas, but not in others. Inconsistency in the provision of service in some areas of the CAA is still a problem. Part of this may be attributable to a resource issue, but a large part of it is about effective management and leadership.” (Engineering training provider, ‘not that confident’ in management of CAA)

“CAA management are dysfunctional and lack leadership. Examples are the behaviour of the ACU and other airworthiness aspects of CAA where differing opinions exasperate organisations.” (Operational agency, ‘not that confident’ in management of CAA)

Issues specific to parachuting ...

“The area of parachuting is a niche area in CAA’s scope of operations. Clubs especially need to be looked after and right now there are too many Part 149 operators. NZPIA is the main one and the others sprouted because they were unable or unwilling to meet the requirements of NZPIA. Whilst embracing competition, the difficulties of having several competing 149 operators are too much in a minority sport or section of the aviation community. I am Chief Safety Officer of RNZAF Whenuapai Aviation Sports Club Parachute Section.” (Parachute club, ‘quite confident’ in management of CAA)

“In parachuting in New Zealand we have multiple 149 administrators, which creates huge problems with identifying individual parachutists and their respective training when trained under a different 149 operator than the one we operate under. It brings confusion and issues relating to the proper management in safety. A parachute technician, for example, who may hold a rating issued under a particular 149 operation, may not meet standards as set out by another 149 operation. These multiple 149s exist as CAA has decided to issue them - we need one 149 administer, not three! I believe it is only a matter of time before injury or death will result due to CAA not enforcing their own rules. We must parachute under a certificate issued by the operation where you are jumping. So for myself, if I wished to parachute at all 149 operations, I must hold THREE certificates. This is costly and confusing to most, and is creating deep conflicts and hatred among industry people. I am simply amazed that CAA would allow such a stupid situation to occur. Previously John Jones had a good approach to parachuting - he seemed to have a very good understanding of problems around multiple 149 administrators and so would only allow one to exist. We MUST return to a system where ONE set of rules applies to all parachutists. Even the fun' events, we call 'boogies' are being boycotted by other 149 certificate holders. Even a charity event I run (Jump Start) is now at risk of ceasing - again due to this crazy multiple 149 situation governing parachuting. Note - this is my own personal view and not necessarily the views of my club.” (Parachuting organisation ‘not that confident in management of CAA)

“We have provided detailed and extensive submissions on this point - our views have not changed from when we wrote our Vfm responses.” (Industry body, ‘not that confident’ in management of CAA)

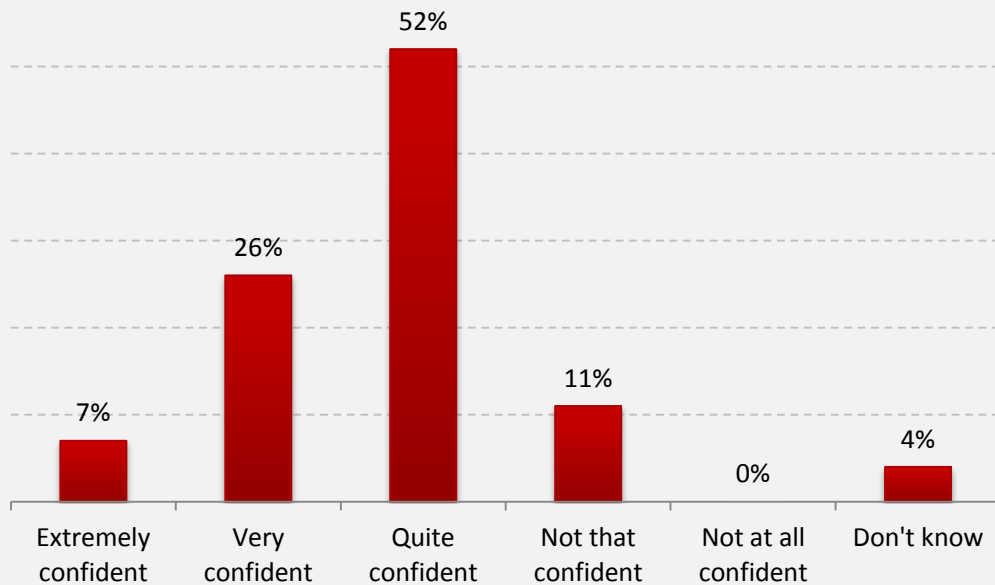
“Security within NZ regional airports/airfields is limited. But probably appropriate for the current low security threat.” (Monitoring and control agency, ‘quite confident’ in management of CAA)

“Our contact with CAA is to do with matters related to Recreational Aircraft. Principally with Rex Kenny who we have a long and productive association with.” (Part 149 organisation, ‘quite confident’ in management of CAA)

Overall confidence in Avsec

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.

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?



Stakeholders' confidence in the management of Avsec to provide effective safety and security measures for the aviation industry in New Zealand is relatively strong with one third (33%) saying they are either 'extremely confident' or 'very confident' and half (52%) saying they are 'quite confident'. Only 11% said they were 'not that confident'.

Stakeholders' reasons for these confidence ratings relate to positive perceptions of staff and that Avsec is regarded well internationally. A few productivity concerns were raised. Verbatim quotes are provided on the next two charts.

Good staff, effective, and well regarded internationally

“Very focussed airport operations with apparently well motivated, trained and dedicated staff.” (Industry body, ‘very confident’ in Avsec)

“Avsec have been very well resourced financially and accordingly have been able to purchase the right capital and HR to do the job.” (Industry body, ‘quite confident’ in Avsec)

“At least here there is one set of rules and regulations, which means everyone is expected to comply with one standard. I travel internationally and domestically and have found this quite satisfactory.” (Non commercial parachuting organisation, ‘quite confident’ in Avsec)

“New Zealand AVSEC is well regarded internationally for its effectiveness.” (Part 149 organisation, ‘very confident’ in Avsec)

“When travelling abroad and comparing Avsec with other overseas’ Authorities, I feel we are up to their Standards and react to perceived risks in a timely manner.” (Operational agency, ‘very confident’ in Avsec)

“My dealings have been related to airport access and flight security. There have been no issues in this area.” (Engineering training provider, ‘very confident’ in Avsec)

“It is not currently run by CAA? It must also work closely with the police and customs, both of which we perceive to be competent organisations.” (Part 149 organisation, ‘quite confident’ in Avsec)

A few concerns including perceived productivity issues

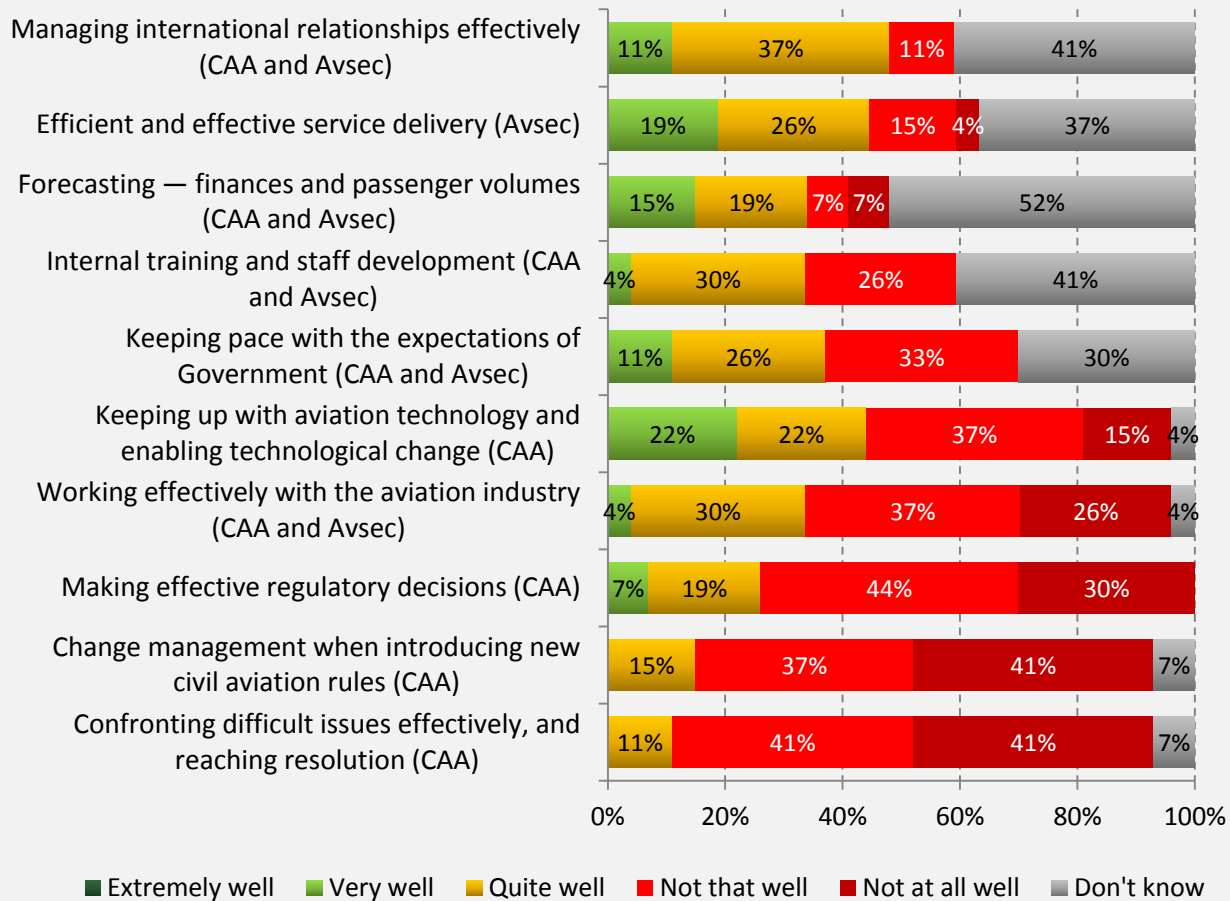
“The size of our country and related Aviation travel does allow for rapid response to initiate. However, it was alarming that recently the media were able to identify a flaw in the airline booking system. What else has not been addressed?” (Maintenance provider, not that confident in Avsec)

“Avsec risk assessment and prioritisation of issues appears biased towards greater security regardless of actual risk. Staffing levels appear high and lack of staff productivity is frequently remarked on by industry participants.” (Industry body, ‘quite confident’ in Avsec)

“While I think the quality of security is high, I am less confident in the cost effectiveness and efficiency of the operation. That said I think significant progress has been made in the way Avsec people engage with travellers and there is a far stronger service ethic portrayed than I believe is evident in most countries.” (Large operator within the industry, ‘quite confident’ in Avsec)

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

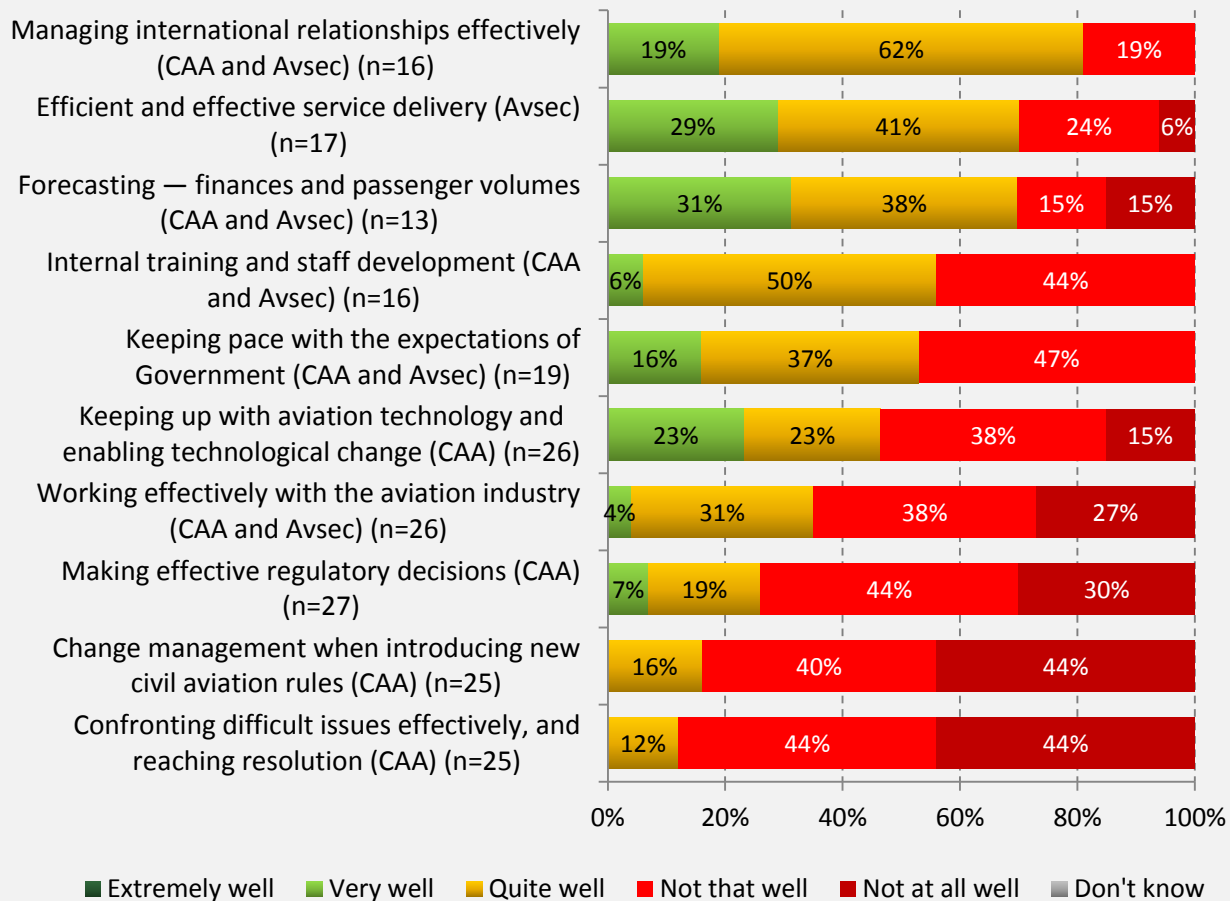
Q4. Below is a list of management policies and practices that many organisations have in place. Thinking only about the CAA and Avsec, please rate how well you think they manage each practice or policy.



Sizeable proportions of stakeholders indicated that they were unable to rate some of these performance aspects due to lack of knowledge. Therefore, the next chart presents this data based only on those who were able to offer an opinion.

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

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.

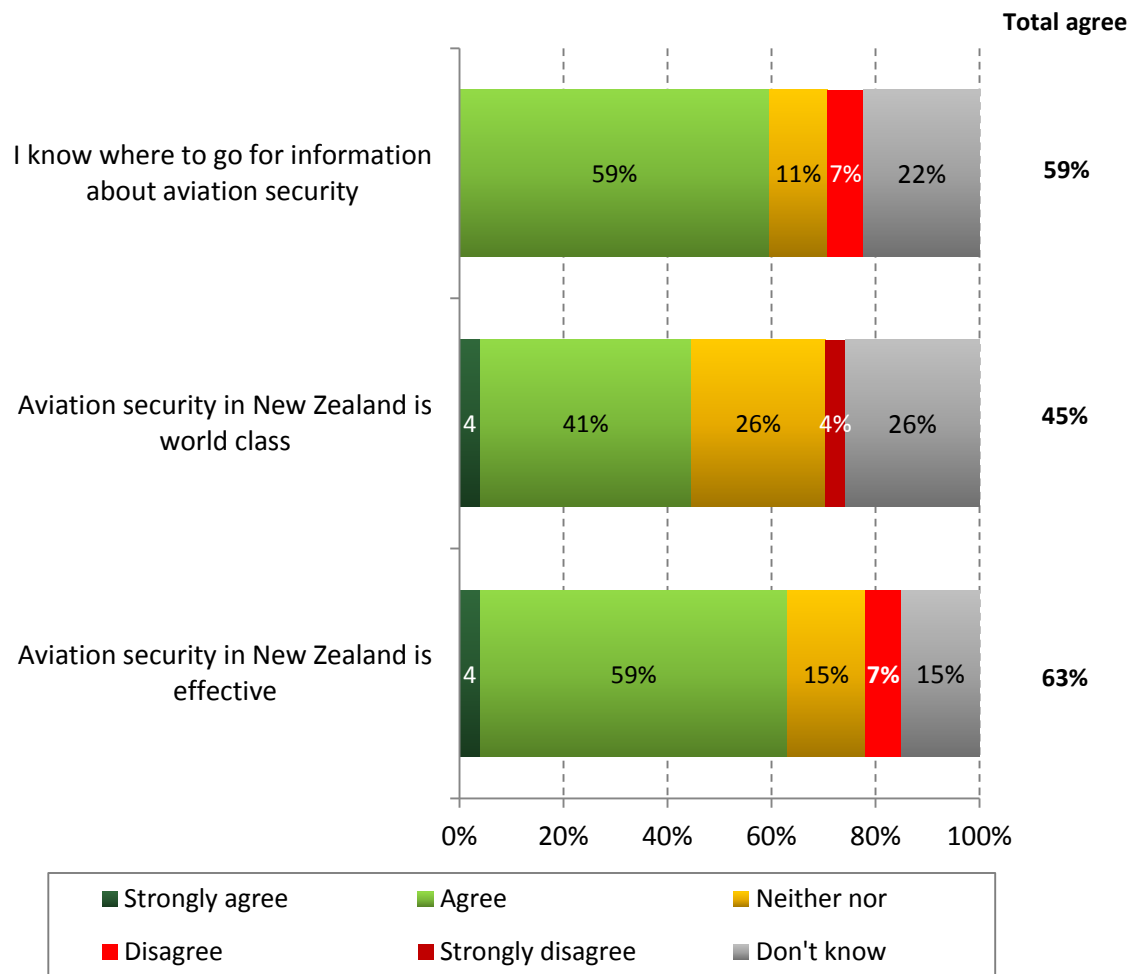


Perceptions vary widely. Perceptions are largely positive in regard to CAA and Avsec's management of international relationships, Avsec's service delivery, the two organisations' forecasting of finances and passenger volumes, internal training and staff development in both organisations, and keeping pace with Government expectations. At least half of those who offered an opinion on these aspects gave a rating of 'very well' or 'quite well'.

Conversely, the performance of CAA is perceived to be especially weak in terms of confronting and resolving difficult issues, change management, and making effective regulatory decisions.

General perceptions of aviation security in New Zealand

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.

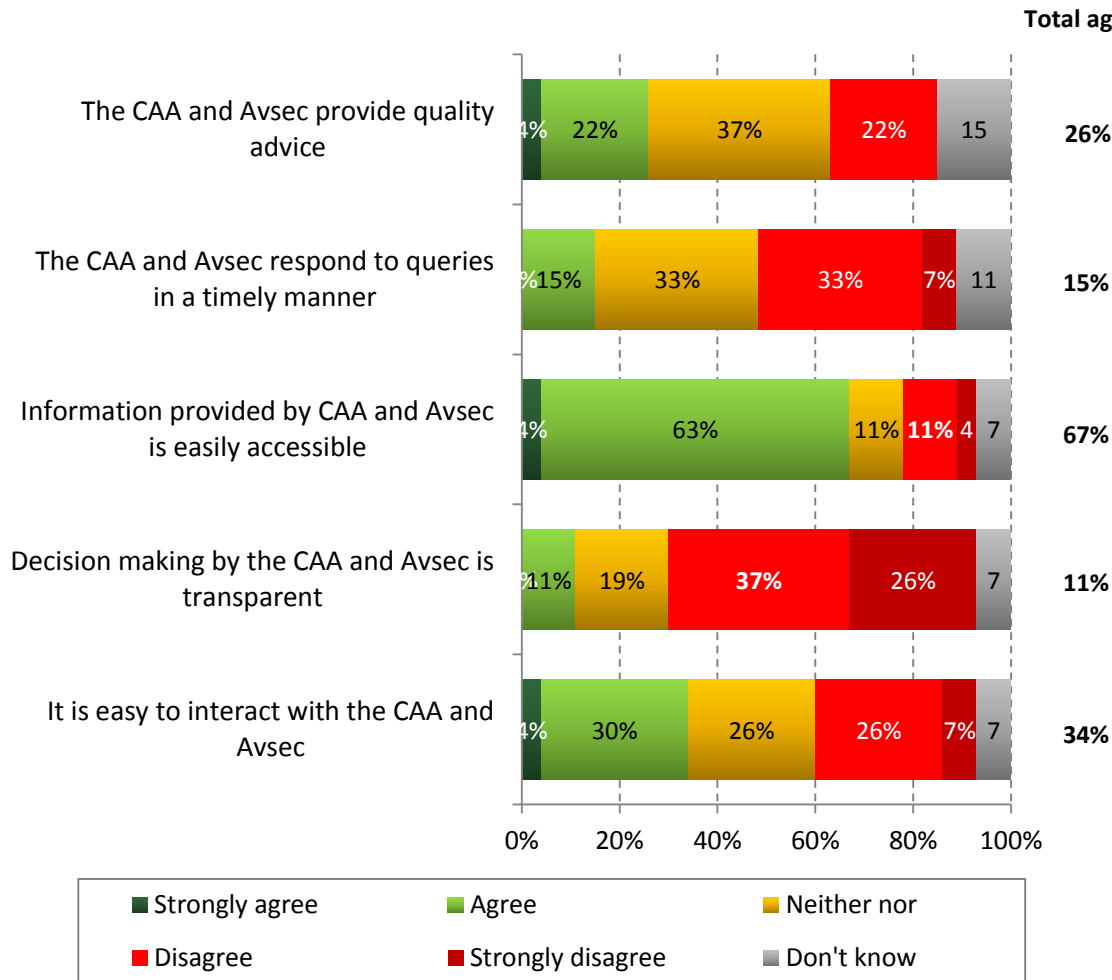


The majority of stakeholders feel they know where to source aviation security information.

A little under half (45%) of stakeholders perceive aviation security in New Zealand to be world class and nearly two thirds (63%) perceive it to be effective. Few disagreed with these concepts. Rather significant proportions indicated they were unsure.

Perceptions of CAA and Avsec's support of the aviation industry

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.



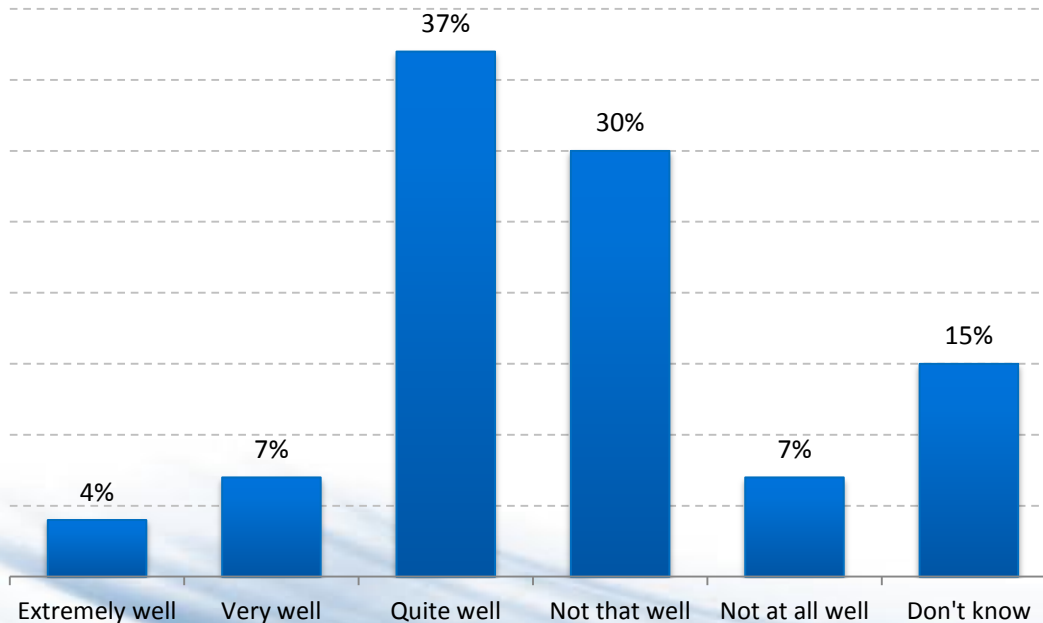
Perceptions of CAA and Avsec's support of the aviation industry are most favourable in regard to the provision of accessible information, and to a lesser extent the provision of quality advice and the ease of interaction with these two organisations.

Views on response times and transparent decision making are notably more mixed.

Perceptions of CAA's overall performance

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?



Views on CAA's overall performance in overseeing the implementation and adherence to safety and security regulations in the industry are mixed with around half (48%) rating their performance at least 'quite well'. However, more than a third (37%) think the CAA oversees these things either 'not that well' or 'not at all well'.

Stakeholders give a range of reasons for these ratings (verbatim comments are detailed on the next three charts). Key themes relate to stakeholders' frustrations over CAA's interpretation of rules, and a perception that the strict focus on compliance can lose focus on the safety intent.

Frustrations about interpretation of rules

*“There is often confusion around rule requirements and interpretation. CAA’s view at times can be very subjective and depends on who you talk to. Auditors’ views can be quite different on the same issue.”
(Large operator within the industry, rates CAA ‘not that well’)*

*“CAA lacks leadership; it allows individual operatives within CAA to apply their own interpretations to the rule. Often we in industry are told by CAA personnel that ‘this is not the intent of the rule’ yet for many of us we were part of the rule creation process and know precisely what the rule intent is, and it is different to the CAA personnel opinion.”
(Large operator within industry, rates CAA ‘not that well’)*

Strict focus on compliance can lose sight of the safety intent

“Implement rules well. A shame that a lot of rules are so focussed on compliance rather than safety!!! Part 115 for example. We will now have pimply faced instructors training people to be parachute drop pilots that have never flown a load of jumpers in their life, but they will comply.” (Operational agency/ industry body/ small operator, rates CAA ‘quite well’)

“Do not fully understand the environment and participants. Tries to establish rules that are very prohibitive and lean to enforcement i.e. not enabling.” (Large operator within industry, rates CAA ‘not at all well’).

“At times there is a Surveillance Auditing obsession with small things which actually have little or no relevance to Airworthiness Safety. They seem to stem from a lack of understanding as to how the Rules are practically applied in a commercial business environment, and the fact that there is very little Policy actually written down since the embracement of the Swedavia - McGregor recommendations. There is the constant reference to either it is the CAA’s view, or the intent of the Rule. At times this is opinion, rather than policy. At the other end of the scale, you find the partial knowledge of possible circumstances which may have led up to the 2003 crash of the Piper PA31-350 at Christchurch, and the 2005 Robinson R22 crash at Murchison. This is the sort of unbalance that some industry participants are cognisant of.” (Aviation consulting and management organisation, rates CAA ‘not that well’)

“CAA safety audits not conducted very professionally.” (Part 149 organisation, rates CAA ‘not that well’)

“Just an overall lack of issues.” (Parachute club, rates CAA ‘extremely well’)

“Generally my experience is that the CAA handle most issues quite well. There are areas that require a complete overhaul. Such as the Aircraft certification unit.” (Engineering training provider, rates CAA ‘quite well’)

“Integrated safety audits by CAA would be more effective and efficient than separate security and safety audits.” (Industry body, rates CAA ‘quite well’)

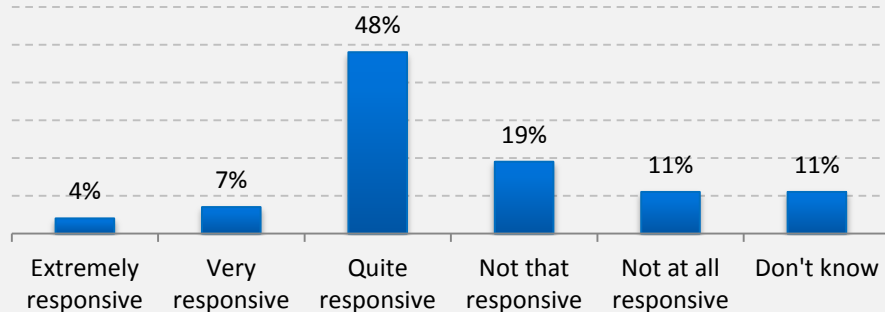
“If aviation security refers to the total system I have never in my whole 20 years in aviation seen the rule making process in such disarray. If you are talking about just aviation security, this rule making is undertaken by small groups of specialists and it seems to go ok provided it is just dealing with specialist areas.” (Industry body, rates CAA ‘quite well’)

“CAA does not seem to enforce Parachuting regulations where multiple 149 administrators are concerned.” (Non commercial parachuting organisation, rates CAA ‘not at all well’)

Perceptions of CAA in applying regulations

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

Responsiveness of CAA in applying regulations

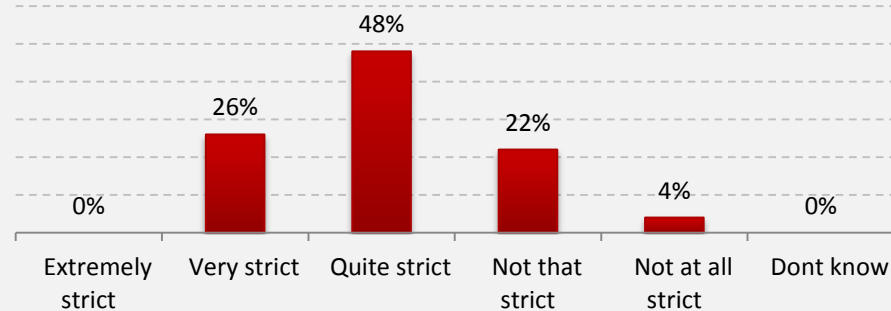


Over half (59%) think that the CAA is at least 'quite responsive' in applying the regulations. Just under a third (30%) perceive the CAA to be 'not that responsive' or 'not at all responsive'.

On the whole, stakeholders perceive the CAA to be strict in applying the regulations across the industry, with around three quarters (74%) saying they are at least 'quite strict'.

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 regulation



Reasons why CAA is not perceived to apply regulations consistently

*“Individual auditors interpret rule requirements in their own way and apply them accordingly.”
(Small helicopter operator)*

*“The taking of some prosecutions appear to be inconsistent and also despite court rulings against a CAA position there is a reluctance to accept this.”
(Industry body)*

“Compliance is more important than common sense and safety. Mind you they are consistent with this.” (Operational agency/industry body/small operator within industry)

“CAA personnel have what we call in the industry, 'over the coffee cup rule making.' GA have a different opinion to Airlines, and ACU are normally different again. It is a classic example of an organisation that lacks leadership. There is no team-manship in CAA. The current structure encourages factions within the organisations where egos and uneducated opinions rise to the fore.” (Operational agency)

“There is no transparency - there is no consistency between auditors or audit interpretations. Many of the auditors do not understand the rules or they understand them in terms of their own interpretations. Really the regulations are not the important things. It's looking at the company expositions. Companies are supposed to run the way they say they are going to run not the way auditors and the CAA believe they should run. We have regulatory creep occurring and at times we just can't get sensible answers.” (Industry body)

“Again my comment relates to the very poor situation surrounding multiple 149 administrators in Parachuting.” (Non-commercial parachuting organisation)

“HSE compliance.” (Monitoring and control agency/ operational agency/ industry body)

Reasons why CAA is not perceived to apply regulations consistently (cont'd)

"Focus is not equitable across the industry e.g. agriculture vs. flight training, also sport and recreation." (Large operator within industry)

"If you are a certificated organisation, yes, there are adequate checks carried out, but there are virtually no checks on non-certificated organisations i.e. part 43/91 maintenance organisations. Maintenance standards especially in the north are still way below acceptable standards. The standard of IAs is questionable also as some are not carrying out ARAs to an acceptable standard; auditing of AI's should be a priority." (Large operator /aviation maintenance and sales)

"I believe that we are seeing too many individual interpretations of Rules by CAA staff." (Maintenance provider)

"The interpretation of the rules varies in consistency between individuals within the CAA." (Operational agency)

"Inconsistency on interpretation and what constitutes compliance to rules." (Large operator within industry)

"Air NZ can effectively operate independently, but CAA does not listen well to different (smaller) aviation organisations. Currently Part 115 is being imposed upon us with consultation that involved CAA issuing their views and listening to only some of our views. Although they removed the obviously impractical bits, they are not open to our professionally presented responses. This proposed rule does not treat the various sports equally, for example, there are different medical requirements for the sports covered by this rule. We have not seen any cost-benefit analysis of the need for this rule in our particular aviation activity, and in our view they have inappropriately included accident statistics for all of our sport as a reason to increase regulation on a tiny part of the sport (under 10%) which has a perfect accident history." (Part 149 organisation).

Perceptions of Avsec's delivery of aviation security services

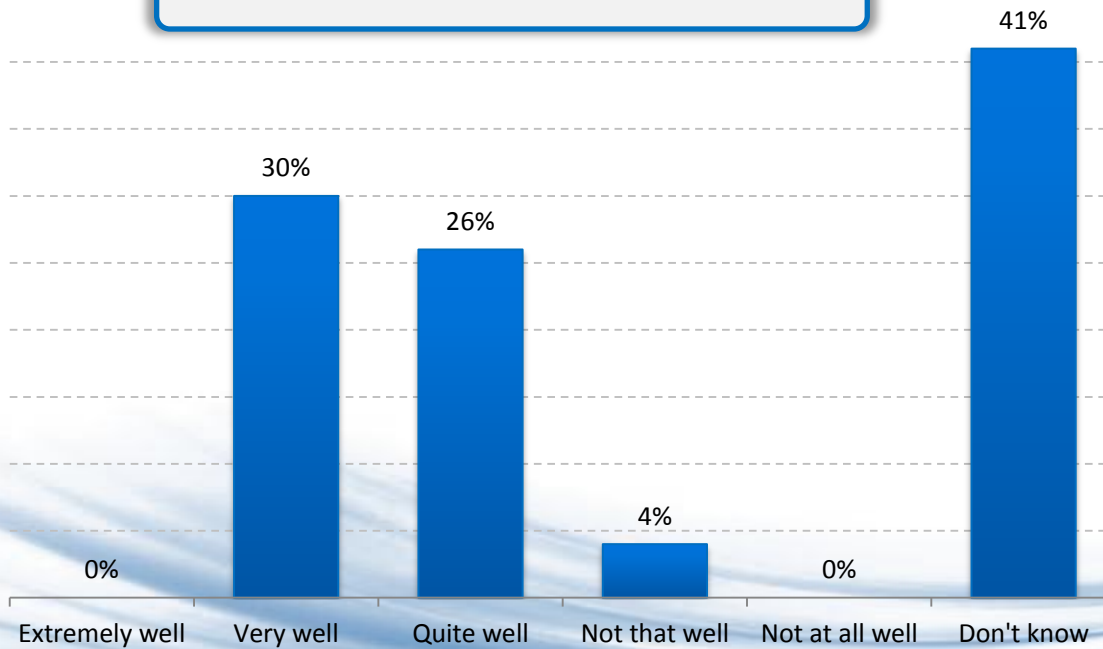
Q12. Avsec is responsible for the delivery of aviation security services. How well do you think Avsec delivers these security services?

Recalculating these percentages by using a base of those who were able to offer an opinion results in 50% for 'very well' and 44% for 'quite well'.

A large proportion of stakeholders felt they did not know enough to comment on Avsec's performance in delivering aviation security services.

However, most think Avsec delivers aviation security services either 'very well' or 'quite well'.

Stakeholders' reasons for these ratings are provided on the next chart.



Reasons for perceptions of Avsec's performance on safety and security

"Their day to day operational performance seems quite good although at times it could be argued that they become obsessive over minor infringements. One area that hasn't worked that well is in the area of temporary security passes, but what a challenge to look after!!!" (Industry body, rates Avsec 'quite well')

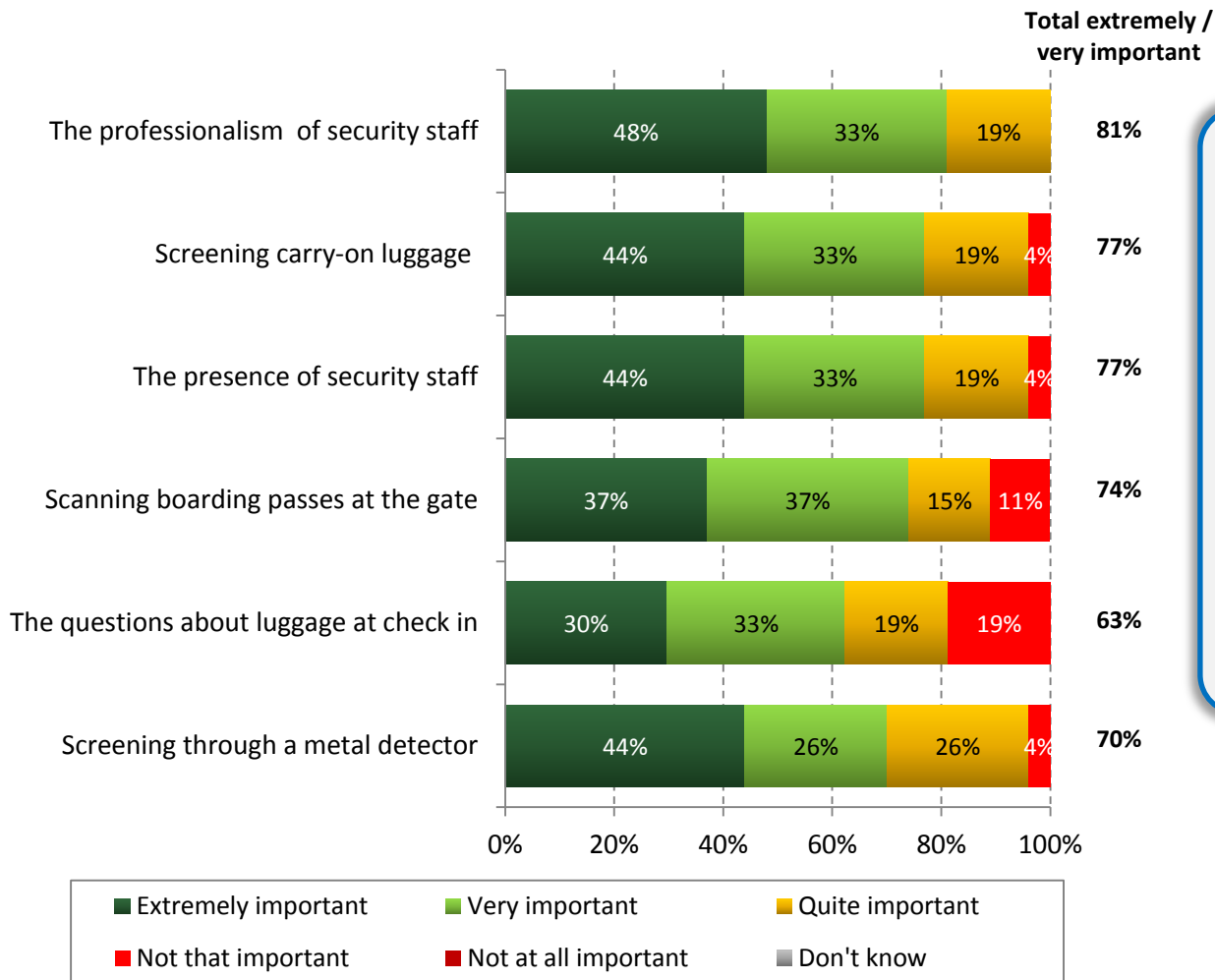
"I am unaware of any measure of performance to deter, detect or prevent terrorist or deranged attacks in New Zealand." (Industry body, rates Avsec 'not that well')

"Avsec put their people on the ground; they have a visible presence and are based around the country." (Operational agency, rate Avsec 'very well')

"Security standards and practices appear good or very good, but cost and efficiency does not meet normal industry standards." (Industry body, rate Avsec 'quite well')

Perceived importance of security procedures

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?

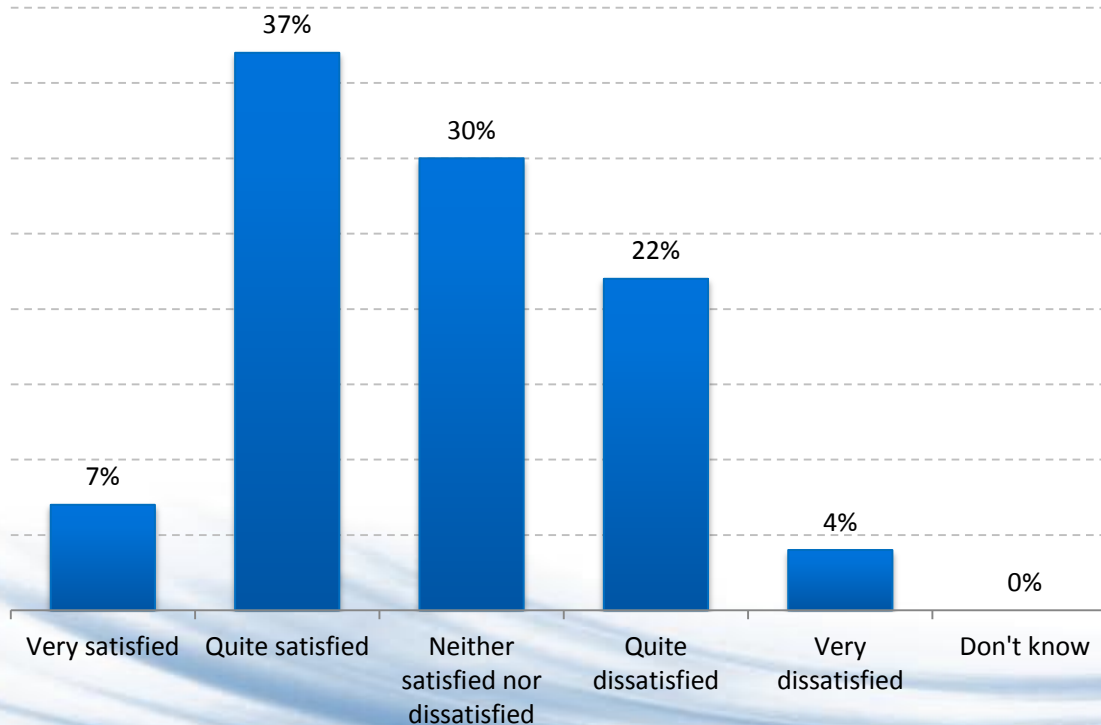


Large majorities of stakeholders think each of these procedures or contacts are important in contributing to the overall safety performance of the civil aviation system.

Questions about luggage at check in are perceived to be the least important. However, nearly two thirds still rate this as either 'extremely' or 'very' important.

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

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

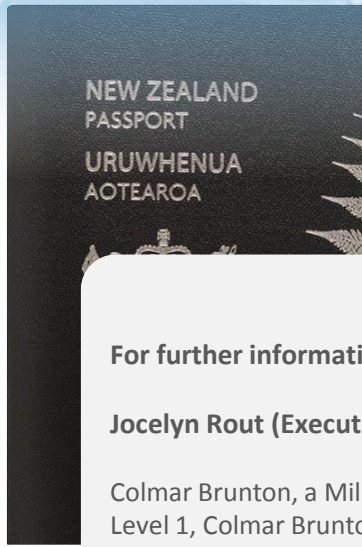


Stakeholders' overall satisfaction with the safety and security performance of the civil aviation system in New Zealand is somewhat polarised.

Under half (44%) are either 'very' or 'quite' satisfied and around a quarter (26%) are either 'very' or 'quite' dissatisfied. The remainder indicated they were neither satisfied nor dissatisfied.



Te Mana Rererangi Tūmatanui o Aotearoa



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