



# PROJECT FEEL SAFE 2017

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

May | 2017



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# Background

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

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

- connecting New Zealand with the rest of the world – 5,773,000 passengers departed New Zealand on international flights in 2016, with an average of 72 NZ residents on every international flight
- connecting New Zealanders with each other – 11,736,000 passengers on board domestic flights within New Zealand in 2016; and
- enabling \$7.99 billion of exports to be flown from New Zealand airports during the 2015/2016 financial year.<sup>1</sup>

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

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

The findings of the research will be used to inform both management and governance decisions. Additionally, the CAA and Avsec will use the information to monitor their performance against targets set in the 2016 – 2026 Statement of Intent.

1. Civil Aviation Authority of New Zealand Annual Report 2015/2016

# The value of understanding perceptions of safety

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

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

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

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

# Putting the survey results into context

## Recent events covered by the New Zealand media that may have influenced ‘perceptions of safety’ in 2017 include:

A parachutist was injured during a jump in northwest Auckland after he landed heavily and injured his back. Three days prior, two Queenstown Skydiving instructors were seriously injured during a tandem training flight – the instructor’s accident is being investigated the Civil Aviation Authority and WorkSafe New Zealand. ([January 2017](#))

A Singapore Airlines plane (Airbus A380 bound for Singapore) was stuck on Auckland Airport tarmac for eight hours while an issue with the nose wheel was investigated. Smoke and the smell of burning rubber had been detected. ([January 2017](#))

A novice pilot on their first solo flight was involved in a minor plane crash at Dunedin Airport. The Cessna 152 light aircraft they were flying bounced during landing causing minor damage to the plane, the pilot was unharmed. ([January 2017](#)).

Jetstar flight JQ251 from Auckland took two attempts to land at Wellington Airport due to winds of nearly 120kph down the runway. ([January 2017](#))

Four people were injured when the Cessna 185F light plane they were on board crashed near Kekerengu. ([February 2017](#))

A top-dressing plane crashed into a field near Kawakawa Bay near Clevedon. The pilot was unharmed. ([February 2017](#))

A helicopter pilot was seriously injured after crashing into forest near Raetihi in the Ruapehu District. ([February 2017](#))

At a Coroner’s Inquest into the death of 2degrees boss Eric Hertz and his wife Kathy in 2013, the Civil Aviation Authority asserted that pilot error was the main cause of the plane crash that killed the couple. ([February 2017](#))

A no-fly zone was established for drones near the Port Hills fires to protect aircraft dousing the fires. ([February 2017](#)).

The New Zealand Pilot’s Association’s application to the court of appeal successfully overturned the CAA’s decision to approve a 90 metre runway safety area (RESA) for Wellington International Airport. ([February 2017](#)).

## Putting the survey results into context (continued)

### Recent events covered by the New Zealand media that may have influenced ‘perceptions of safety’ in 2017 include:

Helicopter pilot Noel Wilson died when his two seater Robinson R22 crashed near Reefton. The crash is being investigated. [\(March 2017\)](#)

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A paraglider crashed at Ohau Ski Field near Twizel. [\(March 2017\)](#)

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A Tiger Moth biplane crash landed at the Omaka Aerodrome in Blenheim. Neither the pilot nor their passenger were injured. [\(March 2017\)](#)

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Police reported that lasers were pointed at two commercial aircraft as they approached Palmerston North Airport. No arrests were made. [\(March 2017\)](#).

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A trainee aviation security dog was shot and killed by NZ Police after getting spooked while being loaded into an AVSEC vehicle and escaping into a security protected area. Flights were delayed for three hours while attempts were made to recapture the dog, but it continued to run across the runway evading capture. An enquiry was launched into the incident. [\(March 2017\)](#)

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Changes were introduced to airports in Britain and the US restricting the electronics passengers are allowed in their hand luggage if arriving from particular airports in the Middle East and North Africa. Any device larger than a cell phone is to be packed in to check in luggage, the change had the potential to disrupt New Zealanders who had already booked flights via those routes. [\(March 2017\)](#)

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Air New Zealand flight NZ5075 from Auckland to Wellington was diverted to Palmerston North Airport when an issue was detected with the ATR aircraft’s landing gear. The flight landed safely and all 64 passengers and five crew disembarked, but due to smoke pouring from the plane all remaining flights for the evening were cancelled. [\(April 2017\)](#)

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Airways launched an investigation into why a system used to help planes land at Wellington Airport failed during heavy rain, causing flights to be suspended. [\(April 2017\)](#)

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A report released by the Transport Accident Investigation Commission, blames mast-bumping for a Robinson R44 helicopter crash near Mt Arthur in the Kahurangi National Park in 2014 that killed pilot Damien Webster. [\(April 2017\)](#)

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A microlight aircraft crashed at Kaka Point, Clutha, killing two people. [\(April 2017\)](#)

## Putting the survey results into context (continued)

Recent events covered by the New Zealand media that may have influenced ‘perceptions of safety’ in 2017 include:

A paraglider died after crashing into a road barrier on Summit Rd in Christchurch. [\(April 2017\)](#)

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A tourist was fined \$500 after landing his drone on a lane of the Auckland Harbour Bridge. CAA said the pilot flew over the harbour bridge to film when the GPS restricted area protection engaged and the RPA commenced auto-land. [\(April 2017\)](#)

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Helicopter pilot Steve Askin was killed in a crash in the Port Hills while fighting fires. An investigation is currently underway. [\(April 2017\)](#)

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A man was killed while paraponting from Queenstown gondola after he crashed into a building at Queenstown Primary School. Civil Aviation Authority were notified. [\(April 2017\)](#)

# Research programme



An online survey of air travellers who live in New Zealand



An intercept survey of international air travellers at airports



# Research objectives

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



measure changes in perceptions over time\*



investigate how users' perceptions of safety vary by different types of aviation activity



provide an understanding of the key things that influence or inform the user's perception of safety



provide demographic sub-group analysis to allow for more detailed analysis of user's perceptions.

# Research method

01.



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

- Online survey of 1,000 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 200,000 members).
- Average time to complete survey was approximately 9 minutes.
- 38% response rate was achieved.
- All interviews were completed during the period of 3 to 19 April 2017.
- Maximum margin of error for the total sample of 1,000 interviews is +/- 3.1% at the 95% confidence level.

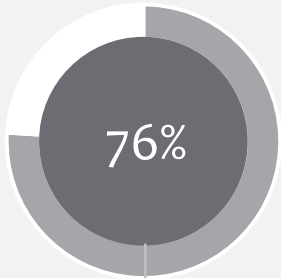
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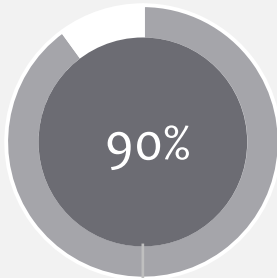
## Research method for intercept survey of international air travellers at airports

- Intercept survey of 329 international travellers at departure lounges at Auckland International Airport (220 interviews) and Wellington International Airport (109 interviews).
- Of the 329 international travellers surveyed, 138 had mainly lived in New Zealand in the last 12 months and 190 had mainly lived overseas in the last 12 months, with the most common countries being Australia, the UK, the USA, Germany and Canada.
- Average interview length was 8.5 minutes.
- 88% response rate was achieved.
- All interviews were completed from 10 to 15 April 2017.
- Maximum margin of error for the total sample of 329 interviews is +/- 5.4% at the 95% confidence level.

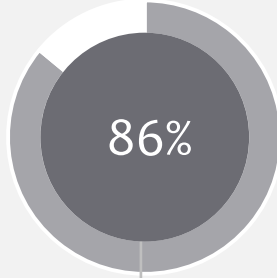
# Key results



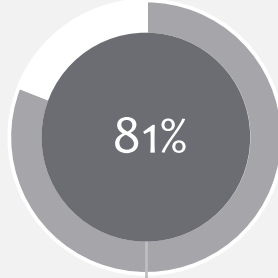
of **NZ resident travellers** felt extremely or very safe and secure on their most recent domestic or international flight  
*(No significant change since 2014)*



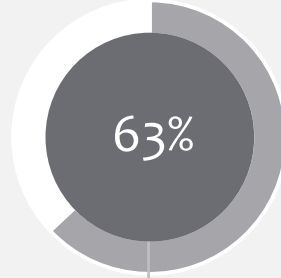
of **overseas visitors** feel extremely or very safe and secure on domestic or international flights departing from New Zealand  
*(No significant change since 2014)*



of people flying to overseas destinations from New Zealand feel safe  
*(No significant change since 2014)*



of people flying on screened domestic routes feel safe  
*(No significant change since 2014)*



of people flying on non-screened domestic routes feel safe  
*(No significant change since 2014)*

# Summary & Conclusions | NZ resident and international travellers

**There continues to be widespread confidence in the safety and security of New Zealand aviation among NZ resident travellers and in particular international travellers – especially those who live overseas.**

Almost 9 in 10 international travellers feel ‘extremely’ or ‘very’ safe and secure when flying within or from New Zealand – those based overseas are significantly more likely to feel this way than those based here. Three quarters of NZ residents felt ‘extremely’ or ‘very’ safe and secure on their most recent flight.

Aviation security in New Zealand is considered effective by almost 9 in 10 international travellers and nearly 8 in 10 NZ resident travellers, and is deemed world class by three quarters of international travellers and around 6 in 10 NZ resident travellers.

All of these results are consistent with those of 2014.

**Pre-flight security checks make the biggest contribution to both NZ resident and international travellers’ feelings of safety and security – particularly the ‘walk through’ metal detectors and scanning of carry on luggage.**

As in previous years, all security procedures conducted before boarding a flight are considered ‘extremely’ or ‘very’ important by the majority of NZ resident and international travellers, but for both groups the ‘walk through’ metal detectors and the hand luggage screening are seen as most important.

Undergoing those personal security checks before boarding a flight and having trust in their effectiveness are the main reasons NZ resident travellers give for feeling highly safe and secure on their most recent flight.

For both NZ resident and international travellers those on un-screened domestic flights feel significantly less safe and secure than those on screened domestic flights.

**There has been a decline in satisfaction among NZ resident travellers since 2014 that the security procedures experienced at New Zealand airports would keep them safe and secure for the duration of their flight – this is primarily attributed to those who have travelled domestically on un-screened flights.**

The main reason given by NZ resident travellers who don’t feel satisfied the security procedures they went through at the airport would keep them safe and secure throughout their flight is the absence of pre-flight personal security checks i.e. walk through metal detectors and hand luggage scanning.

**More NZ resident travellers would like all domestic flights to be screened.**

The proportion of NZ resident travellers who think all flights in New Zealand should be screened has risen from around 7 in 10 in 2014 to almost 8 in 10 in 2017.

**Other factors that NZ resident travellers say contributed to their feeling of safety and security on their most recent flight include the professional, well trained and competent airline staff/pilots/cabin crew, trust in the airline due to their good safety record and reputation, the calm/friendly/helpful nature of airport staff and cabin crew, and the in-flight safety procedures and checks.**

## Summary & Conclusions | NZ resident and international travellers (2)

### **Participation in adventure/recreational aviation activities is lower, on average, for both international travellers and NZ resident travellers than in 2014.**

In 2017 helicopter flights were added for the first time to the list of activities measured. Helicopter flights are by far the most common adventure/recreational aviation activity undertaken by both NZ resident and international travellers in 2017, followed by sky diving and recreational flying. Taking into account only the four adventure/recreational aviation activities that were measured in both 2014 and 2017 (i.e. sky diving, recreational flying (including in a microlight), gliding, and paragliding/hang gliding), 15% of international travellers and 26% of NZ resident travellers have undertaken at least one of these activities in 2017, these are lower rates of participation than in 2014 (25% and 32% respectively).

### **Helicopter flights are seen as the least risky adventure/recreational aviation activity overall, while paragliding/hang gliding and sky diving are considered the most risky. As in previous years, participants in the activities are less likely to consider them risky than non-participants.**

These findings apply to both NZ resident travellers and international travellers.

### **When taking all aspects of aviation safety and security in New Zealand into account, the majority of NZ resident and international travellers feel highly safe and secure when flying in New Zealand - including any adventure/recreational aviation activities they participate in.**

International travellers are more likely than NZ resident travellers to feel 'extremely' or 'very' safe and secure when flying in New Zealand, when all forms of flying are considered (87% vs. 69% of NZ resident travellers). The result for international travellers is similar to how safe and secure they feel flying on New Zealand domestic flights or international flights departing the country. Whereas NZ resident travellers feel less safe and secure about flying when thinking of all types of flying they participate in, than when they only consider their most recent flight which tends to be with a commercial airline.

### **Knowing where to go for further information about aviation security and the ease of accessing information about aviation security are still the weakest performing areas that we measure - for both NZ resident and international travellers.**

However, there has been significant improvement in these two areas for NZ resident travellers since 2014.

### **Awareness of New Zealand civil aviation safety and security media coverage among NZ resident travellers has gradually declined over the past five years.**

Since 2012 there has been a steady decrease in recall of coverage about 'aviation accidents' among NZ resident travellers. While television news is still the main source for information about civil aviation and security in New Zealand, it has continued to decline as a source over time.

### **Most NZ resident travellers think that drones or unmanned aerial vehicles pose a risk to aviation safety generally, and support their regulation.**

Almost 8 in 10 NZ resident travellers consider the use of drones to be 'extremely' or 'very' risky for aviation safety generally. There is widespread acceptance that drone use should be restricted near airports, even among those who don't think they're particularly risky. Safety and invasion of privacy are the main concerns NZ residents have about drones.



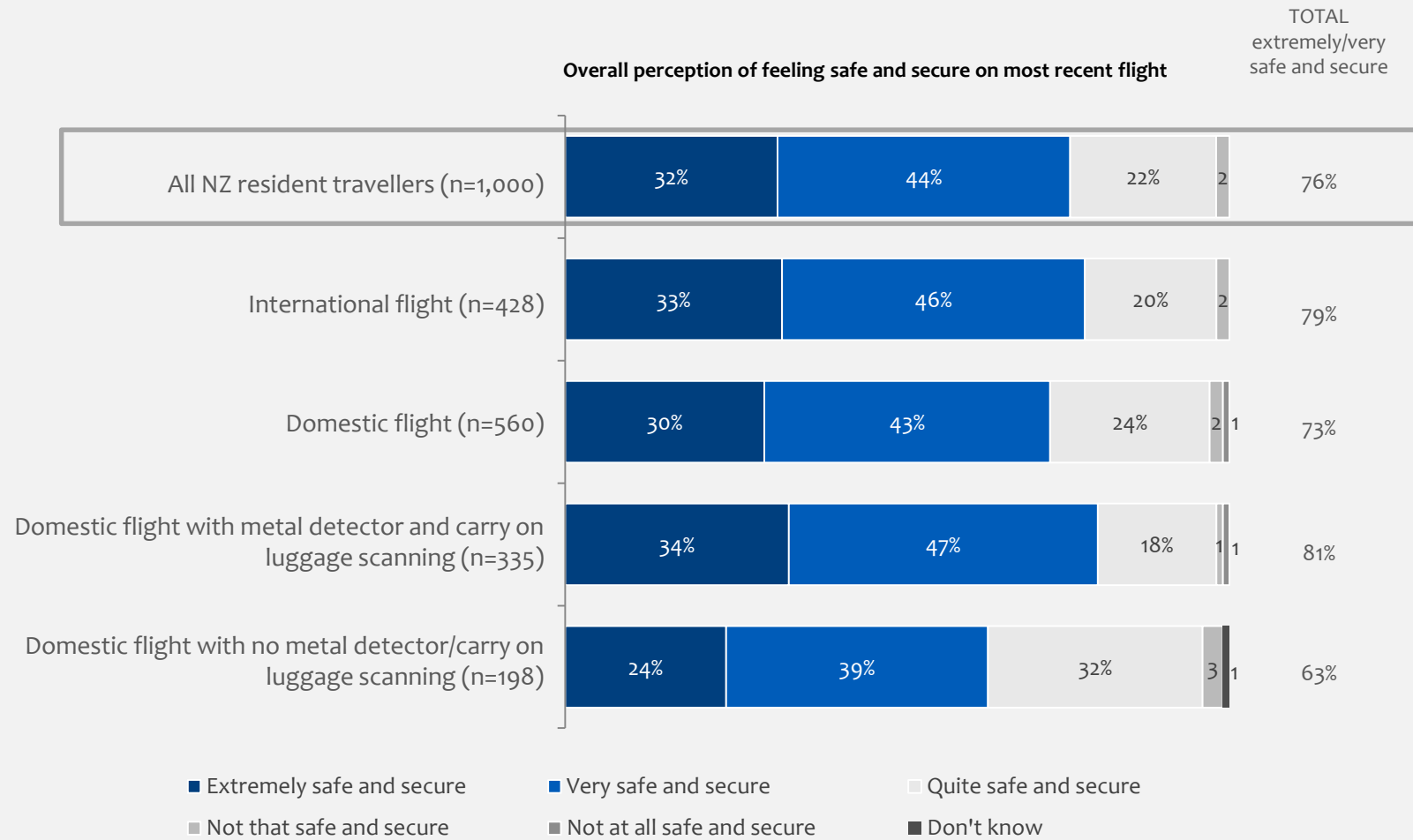
# New Zealand Resident Traveller Survey results



# Three quarters of New Zealand resident travellers felt highly safe and secure on their most recent flight.



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



Domestic flight passengers who experience a personal security check before boarding (i.e. walk through a metal detector and have their hand-luggage scanned) are more likely to feel 'extremely' or 'very safe and secure on their flight than those who have not had those pre-flight checks.

No demographic differences are evident in these results.

Perceptions of safety and security on the most recent flight have remained fairly consistent over the past three measures. There hasn't been a significant change in sentiment for any of the flight types shown below since 2014, but overall there has been a significant increase in NZ resident travellers' feeling of safety and security since 2011 (from 72% up to 76% in 2017). This increase has primarily come from those on screened domestic flights, their feeling of safety and security has risen significantly since 2011 (from 73% up to 81% in 2017).



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

Total extremely / very safe and secure

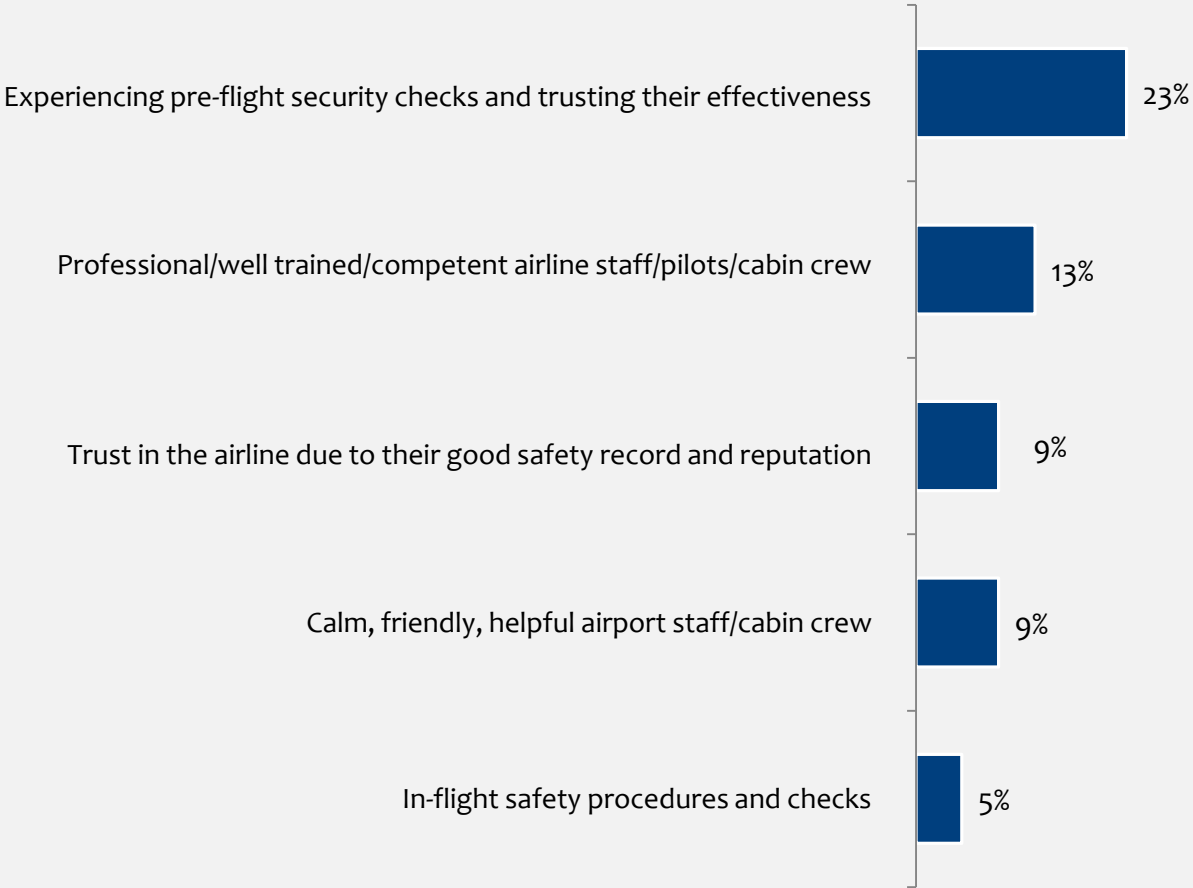
	2011	2012	2014	2017
All NZ resident travellers	72%	75%	75%	76%
International flight	75%	79%	77%	79%
Domestic flight	71%	70%	75%	73%
Domestic flight with metal detector/carry on luggage scanning	73%	75%	78%	81%
Domestic flight with no metal detector/carry on luggage scanning	68%	60%	69%	63%

Bases: All NZ resident travellers (2011 n=1,036; 2012 n=1,052; 2014 n=1,229; 2017 n=1,000), International flight (2011 n=433; 2012 n=464; 2014 n=580; 2017 n=428), Domestic flight (2011 n=589; 2012 n=568; 2014 n=627; 2017 n=560), Domestic flight with metal detector/carry on luggage scanning (2011 n=394; 2012 n=356; 2014 n=415; 2017 n=335), Domestic flight with no metal detector/carry on luggage scanning (2011 n=177; 2012 n=196; 2014 n=191; 2017 n=198)



Experiencing pre-flight security checks and having trust in their effectiveness continue to be the main reasons New Zealand travellers have for feeling highly safe and secure on their most recent flight. Examples of the five main reasons are displayed on the following two pages.

Reasons for feeling 'extremely' or 'very' safe and secure on most recent flight



## 66 Experiencing pre-flight security checks and having trust in their effectiveness

The security is very thorough with their detections abilities, and I feel the walk through machines wouldn't miss much. We also got pulled aside for some forgotten goods in our bag that were harmless but looked worse on screen. *(Extremely safe and secure)*

I trust the screening process to keep dangerous people and objects off of airplanes. Of course, nothing is ever perfect, but if I dwell on all the "what ifs" I would never leave my house. *(Very safe and secure)*

Security was tight! If nothing I have in my pocket or bag gets through without a check and possible recheck I feel that everyone else will get the same treatment! *(Very safe and secure)*

The checks that happened before getting on the plane made me feel very safe because if other passengers all have to go through the same vetting system, it would have picked up any possible hazards/issues. *(Very safe and secure)*

They randomly selected people for further checks to ensure no drugs/offensive weapons. Went through x-rays and they even checked for bottled water in another passengers' bag. *(Extremely safe and secure)*

I understand all bags are x-rayed, access to aircraft is highly restricted. All passengers, cabin bags, are x-rayed and you have to pass through a metal detector. *(Extremely safe and secure)*

Passengers and luggage were effectively screened before departure. I even had to remove my shoes. *(Extremely safe and secure)*

Screening process is good in that people were being stopped regularly for liquids. *(Extremely safe and secure)*

Staff were extremely thorough in the screening process, [it] gives confidence the process works. *(Extremely safe and secure)*

I think the security has improved in NZ. It was not that long ago that security was non-existent on domestic flights. I felt that my bags were screened well and that all passengers had been scanned. *(Very safe and secure)*

Luggage was checked so you have to trust that they are doing a good job. Also in NZ you have to fill out departure card so you hope that that is an extra safety check that they know who is coming in and out of the country. *(Very safe and secure)*

The new and improved security set up in the Wellington airport is fantastic. No chance of just anybody forcing their way through security and boarding the plane. *(Extremely safe and secure)*

The security staff seemed to be paying attention as we passed through stopping necessary people. They looked focused on their jobs. *(Very safe and secure)*

## “ Professional, well trained and competent airline staff/ pilots/cabin crew

... The staff are always professional and appear confident which contributes to the feelings of security. *(Extremely safe and secure)*

... I'm also of the optimistic impression that all staff and crew are sufficiently well trained that they know what they are doing. *(Very safe and secure)*

NZ AVSEC always seem to me to be professional and thorough, without going to the absurd (pointless and unnecessary) extremes of some of their international counterparts. *(Extremely safe and secure)*

## “ Calm, friendly and helpful nature of airport staff and cabin crew

... Their calm, friendly and orderly manner of carrying out their duties. *(Very safe and secure)*

... Pleasant, helpful staff kept us informed at all times. *(Extremely safe and secure)*

Relaxed passengers. Relaxed and friendly staff and crew. *(Extremely safe and secure)*

Staff were smiley and friendly and [I] didn't once think about being unsafe or anything. *(Extremely safe and secure)*

Just everything from the comfort to the staff who were very friendly as well as the pilot making jokes during the flight. *(Extremely safe and secure)*

## “ Trust in the airline due to its good safety record and reputation

Air NZ has a good track record. I totally trust my home airline. *(Extremely safe and secure)*

Travelling on a recognised airline that has had no problems. *(Very safe and secure)*

I prefer to travel on Air New Zealand or Qantas, but preferably Air New Zealand, as I feel their safety and security processes are sound. *(Very safe and secure)*

Travelled with Air NZ my preferred airline whom I trust. *(Very safe and secure)*

## “ The inflight safety procedures and checks

... On board the flight procedures were followed to make sure the passengers were safe and the cockpit was secure... *(Very safe and secure)*

Informative, engaging safety video. *(Very safe and secure)*

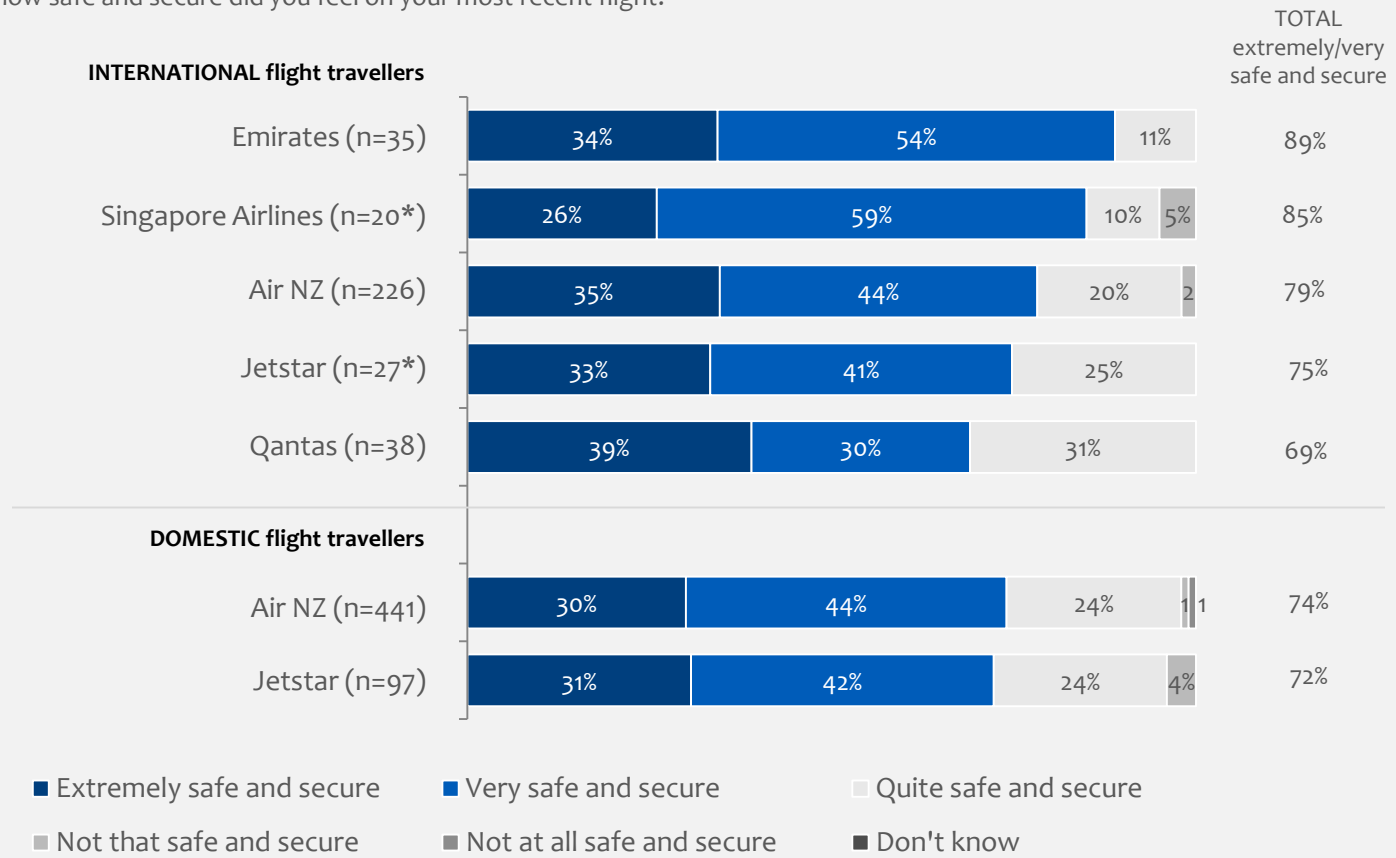
... inflight safety video and demonstrations. *(Extremely safe and secure)*

I travelled alone so had an emergency exit seat. The flight attendant made sure that I understood the procedures and asked if I was still comfortable to assist. *(Very 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?



Generally, New Zealand travellers on international flights feel equally safe and secure irrespective of which airline they fly with. Similarly, all airlines' domestic flight passengers feel equally safe and secure.

While Qantas international flight passengers have a lower proportion of passengers who feel highly safe and secure, the small base means the Qantas results are not significantly different from the average. Similarly the small base for Emirates means their results are not significantly different from the average.

Base: International flight travellers – all who have flown internationally on each airline; Domestic flight travellers – all who have flown domestically on each airline, 2017

\* Caution: Low base number results are indicative only.

Travellers flying internationally with Qantas rate their feeling of safety and security lower than in 2014, however this result for Qantas is now back inline with the pre-2014 Qantas result. Results for all other airlines across both international and domestic flights are stable.



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

Total extremely / very safe and secure

	2011	2012	2014	2017
<b>INTERNATIONAL Travellers</b>				
Emirates	73%	97% ▲	86%	89%
Singapore Airlines	70%	76%	83%	85%
Air NZ	77%	82%	73% ▼	79%
Jetstar	73%	68%	76%	75%
Qantas	73%	76%	91% ▲	69% ▼
<b>DOMESTIC Travellers</b>				
Air NZ	72%	70%	79% ▲	74%
Jetstar	68%	73%	63%	72%

Bases: International flight travellers – Emirates (2011 n=30; 2012 n=28\*; 2014 n=44; 2017 n=35), Singapore Airlines (2011 n=18\*; 2012 n=22\*; 2014 n=35; 2017 n=20\*), Air New Zealand (2011 n=227; 2012 n=245; 2014 n=303; 2017 n=226), Jetstar (2011 n=28\*; 2012 n=22\*; 2014 n=30; 2017 n=27\*), Qantas (2011 n=42; 2012 n=47; 2014 n=72; 2017 n=38)

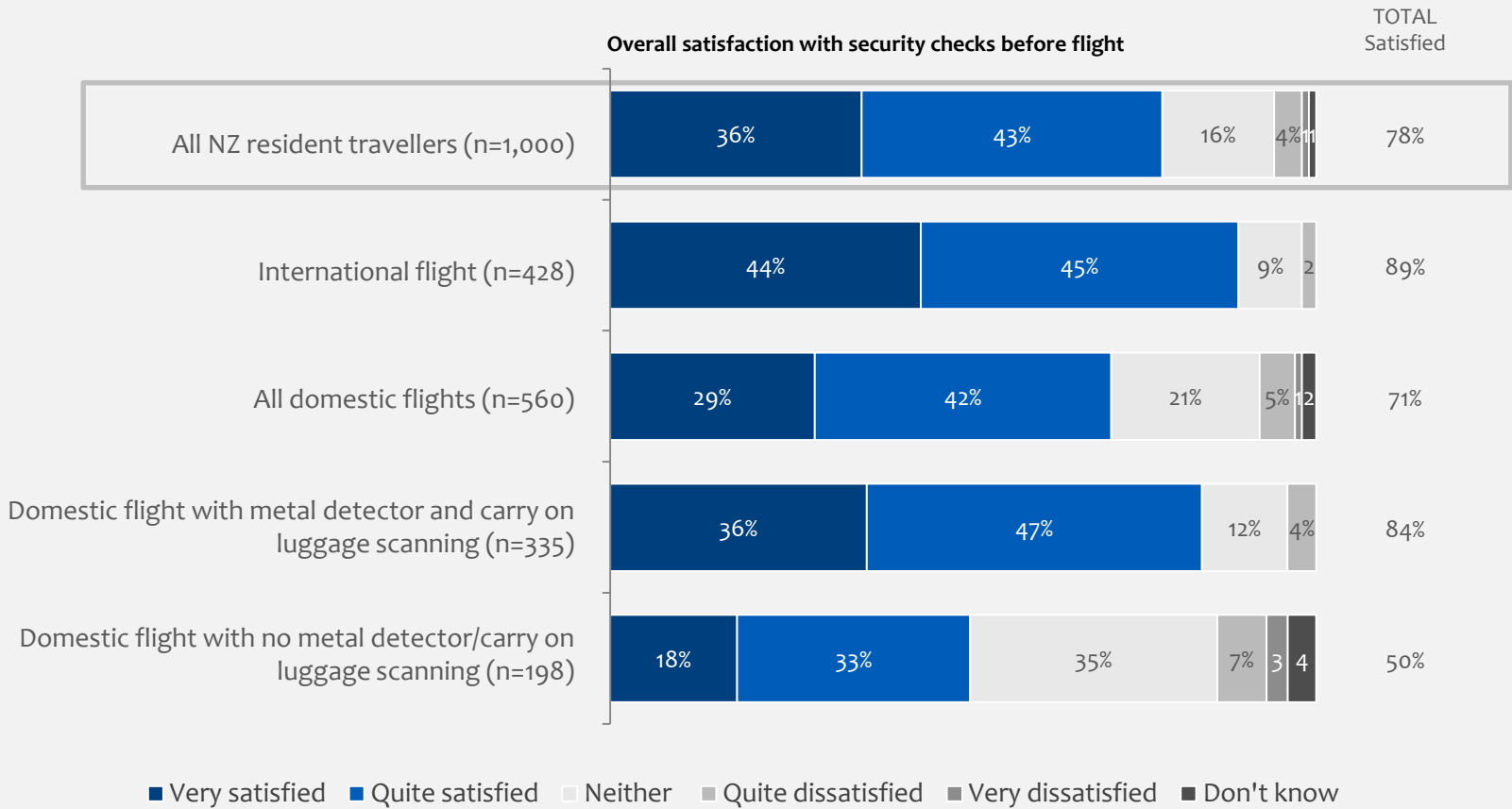
Bases: Domestic flight travellers – Air New Zealand (2011 n=472; 2012 n=447; 2014 n=485; 2017 n=441), Jetstar (2011 n=74; 2012 n=75; 2014 n=90; 2017 n=97)

\* Caution: Low base number results are indicative only.

The majority of NZ resident travellers are satisfied that the security checks conducted before their flight would keep them safe and secure. Passengers on un-screened domestic flights are less likely to be satisfied than average.



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?



Domestic travellers who walk through a metal detector and have their carry on luggage scanned before their flight are more likely to be satisfied the security checks would keep them safe and secure during their flight than those on domestic flights without these procedures.

International flight passengers have more confidence in the pre-flight security checks than domestic flight passengers, but this partly explained by the lower level of satisfaction among passengers on un-screened domestic flights.

Older New Zealand travellers are more likely than average to be satisfied with the pre-flight security procedures (95% of 65+ year olds compared to 78% of all NZ resident travellers).

Base: All who have flown on each type of flight, 2017

Satisfaction with pre-flight security checks has decreased since 2014. The drop in satisfaction has come from Domestic flight passengers (primarily those on flights with no metal detectors/carry on luggage scanning).



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

Total satisfied

	2011	2012	2014	2017
All NZ resident travellers	81%	81%	83%	78% ▼
International flight	90%	90%	89%	89%
Domestic flight	75%	75%	77%	71% ▼
Domestic flight with metal detector/carry on luggage scanning	83%	85%	86%	84%
Domestic flight with no metal detector/carry on luggage scanning	57%	57%	58%	50%

Bases: All resident travellers (2011 n=1,036; 2012 n=1,052, 2014 n=1,229; 2017 n=1,000), International flight (2011 n=433; 2012 n=464, 2014 n=580; 2017 n=428), All domestic flights (2011 n=589; 2012 n=568; 2014 n=627; 2017 n=560), Domestic flight with metal detector and carry on luggage scanning (2011 n=394; 2012 n=356; 2014 n=415; 2017 n=335), Domestic flight with no metal detector/carry on luggage scanning (2011 n=174; 2012 n=196; 2014 n=191; 2017 n=198)

While very few New Zealand resident travellers were dissatisfied with the security screening before boarding their flight, the proportion who felt either 'very' or 'quite' dissatisfied has increased since 2014. Conducting visible pre-flight security checks on all domestic flights is still the main suggestion given to help improve satisfaction. Some also feel that staff could be more polite when communicating with passengers.

## 66 Conduct visible pre-flight security checks on all domestic flights

*Check in or scan people's hand luggage, some people could be carrying anything on board, and as those planes are not that big would be scary if someone was to attack. (Quite dissatisfied)*

*Having ANY checks done would be a good start. (Quite dissatisfied)*

*I feel as though the security checks within NZ (from my experience) are nowhere near thorough enough and often times I could board a plane travelling within the South Island (e.g. DUN - CHC) and not even go through scanners. (Quite dissatisfied)*

*I saw another passenger get through security with a meaty pair of scissors. I'm assuming they were not supposed to get through security. (Quite dissatisfied)*

*No real security checks at regional airports. You only get checked if you travel via major cities. (Quite dissatisfied)*

*When returning home to Christchurch from Auckland, an item was picked up in my handbag. My handbag was searched. The item was cleared OK but it left me wondering why it hadn't been picked up in Christchurch? (Quite dissatisfied)*

*There were no security checks at Whakatane Airport. None apparent in domestic Auckland either. (Very dissatisfied)*

*We left from Napier Airport and there was no security check at all. (Very dissatisfied)*

*I watched with concern as scanning staff at the Wellington Airport were joking and laughing in a group as items were going through the scanner prior to my flight boarding. It was my flight, I hate flying, I felt they were not interested in my safety, just collecting a pay packet. (Very dissatisfied)*

## 66 Communicate with passengers politely

*Was chosen to be searched randomly. Was not told what was happening and why it was. When finished they yelled saying hurry up and leave. Communication needs to be better. (Very dissatisfied)*

*The person checking my bags was very rude. Racist in a way. Making comments about me not knowing how to read the signs and making a cheeky grin to the other 'white' kiwis behind me. (Quite dissatisfied)*

*They could have been more friendly not so rude. (Quite dissatisfied)*



All of the pre-flight security procedures are seen as highly important by the majority of NZ resident travellers, particularly the screening of carry on luggage and the ‘walk through’ metal detectors. Questions about luggage at check in are seen as relatively less important than the other security procedures.

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



Base: All NZ resident travellers, 2017 (n=1,000)

Women are more likely than men to consider each procedure to be important.

Older travellers aged 65+ years are more likely than other age groups to feel each security measure is important, whereas younger travellers aged 18 to 34 years are less likely than 45+ year olds to think each is important.

Less frequent travellers, who have flown 1 to 3 times in the past year are more likely to think the questions about luggage at check in and the walk through metal detectors are important, compared to more frequent travellers who have flown 7 or more times in the last 12 months.

Hand luggage screening is considered one of the most important pre-flight security procedures overall, but a smaller proportion of NZ resident travellers view it as ‘extremely’ or ‘very’ important than in 2014. Results for all other security measures are stable.

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

Total extremely/very important

	2011	2012	2014	2017
Carry on luggage screening	89%	89%	89%	86% ▼
The metal detector that you walk through at the screening point	86%	86%	86%	84%
The requirement to scan your boarding pass at the gate	78%	80%	82%	81%
The presence of aviation security officials	78%	78%	79%	79%
The questions about your luggage at check in	62%	67% ▲	64%	66%

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

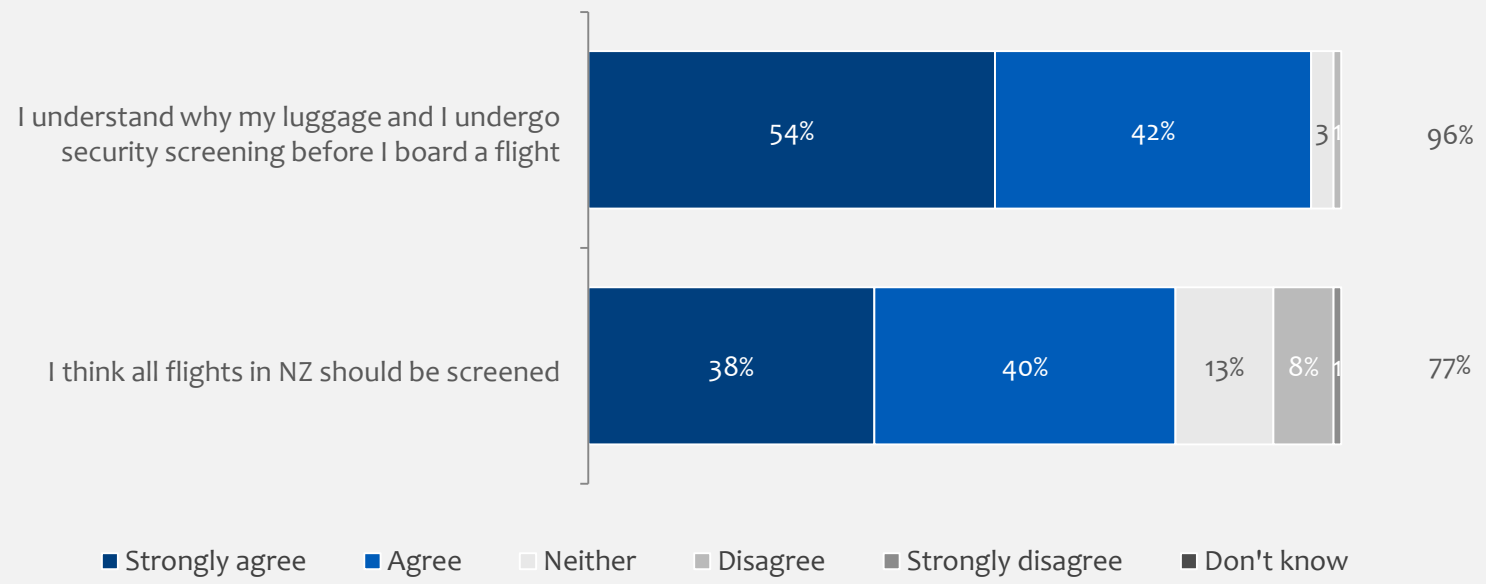
Nearly all NZ resident travellers understand why pre-flight security screening is conducted. Over three quarters think all New Zealand flights should be screened.



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

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

TOTAL agreement



Women are more likely than men to feel all New Zealand flights should be screened (82% vs. 72% of men).

Older travellers aged 65+ years are also more likely than average to feel this way (83% vs. 77% of all NZ resident travellers).

Less frequent travellers, who have flown 1 to 3 times in the past year are more likely than average to believe that all NZ flights should be screened (80%), whereas frequent flyers, who have flown 12 or more times in the year are less likely than average to have this view (63%).

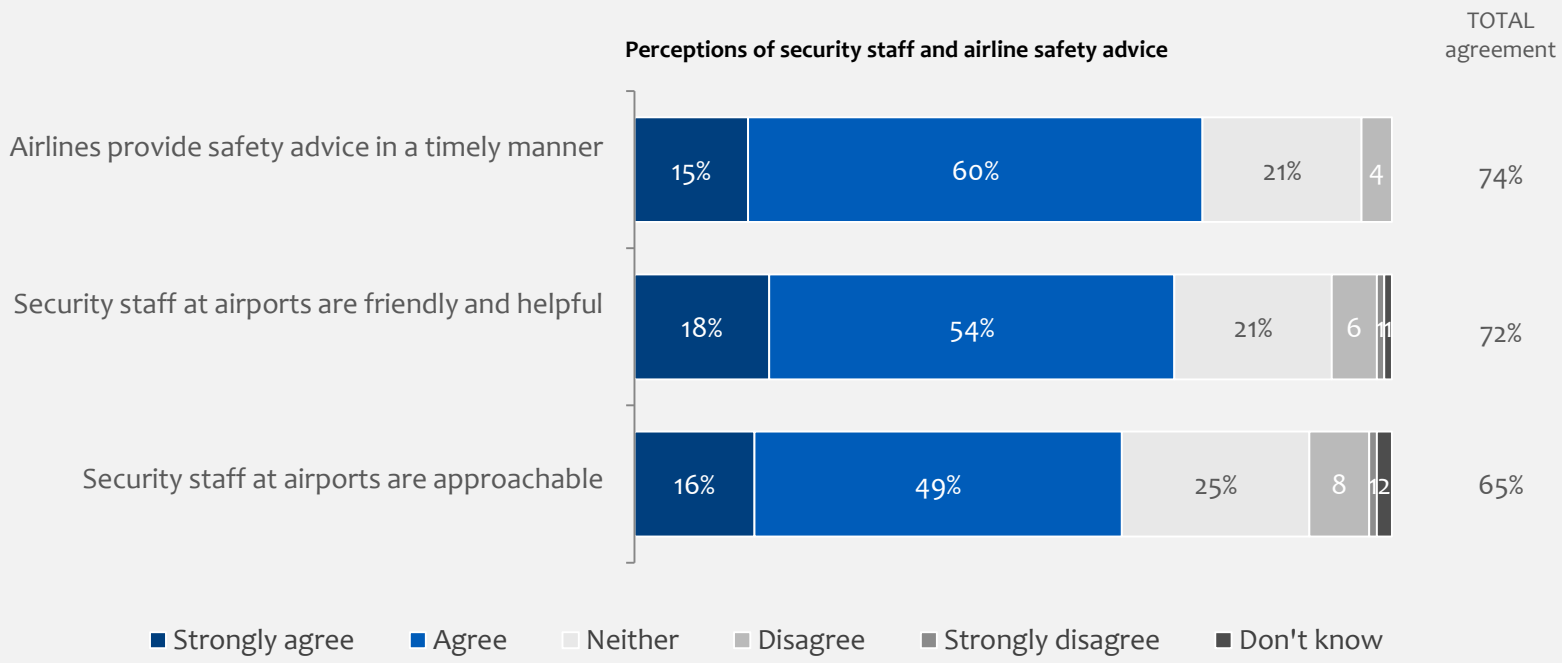
Base: All NZ resident travellers, 2017 (n=1,000)

Around three quarters of NZ resident travellers say airlines provide safety advice in a timely manner. Security staff at airports are considered more friendly and helpful than they are approachable, although the majority do find them approachable.



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

Perceptions of security staff and airline safety advice



There are no demographic differences in perceptions of security staff and airline safety advice.

Base: All NZ resident travellers, 2014 (n=1,000)

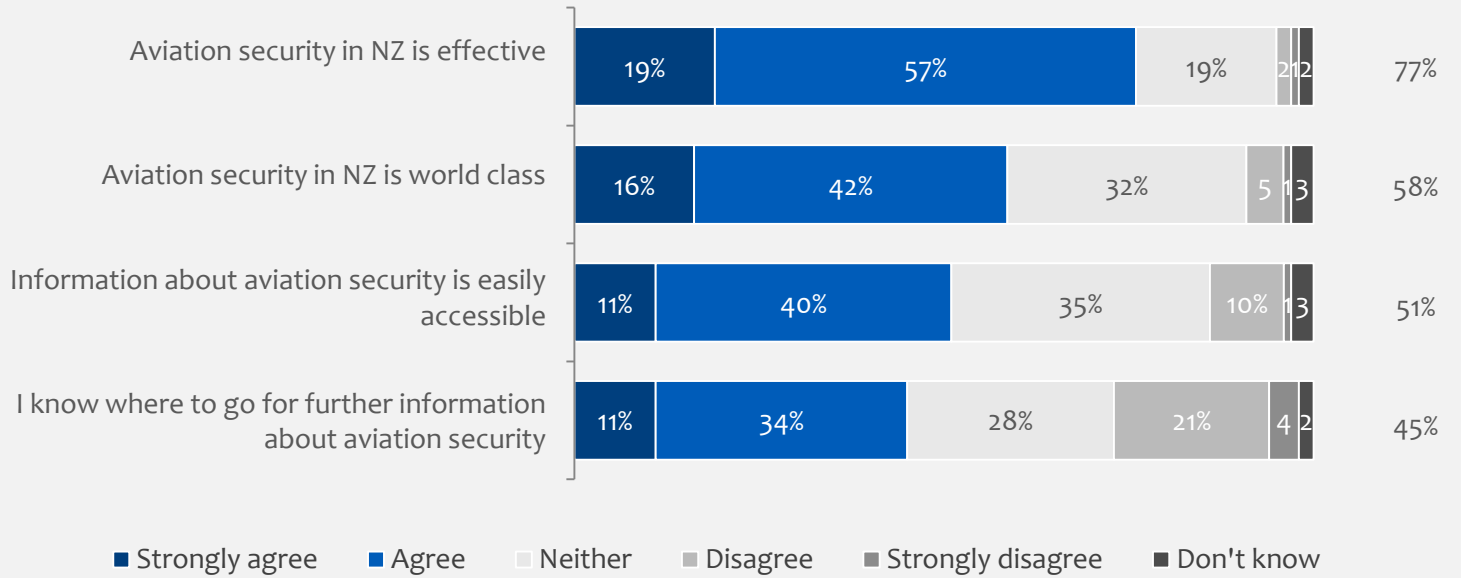
The vast majority of NZ resident travellers think aviation security in New Zealand is effective, but only a little over half consider it to be world class. As in previous years, the weakest performing areas that we measure continue to be the accessibility of information about aviation security and knowing where to go for further information about aviation security.



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

General perceptions of aviation security in New Zealand

TOTAL agreement



NZ travellers on un-screened domestic flights are less likely than those on screened domestic flights to consider aviation security in New Zealand to be effective (68% vs. 79% of those who experienced personal security checks before their domestic flight).

Those on un-screened domestic flights are also less likely to think aviation security in New Zealand is world class (49% vs. 60% of those on screened domestic flights).

Older travellers aged 55 years or over are more likely than average to believe aviation security in NZ is world class (67% vs. 58% of all NZ resident travellers). Men are also more likely than women to hold this view (63% vs. 54% of women).

Men are also more likely than women to agree that information about aviation security is easily accessible (57% vs. 45% of women), and that they know where to go for further information about aviation security (51% vs. 40% of women).

Base: All NZ resident travellers, 2017 (n=1,000)

While the ease of accessing information about aviation security, and knowing where to go for further information about aviation security are still relatively low performing areas, there has been a significant improvement for both since 2014. In fact, there has been a gradual increase in agreement with these statements over time since 2011.

There has been a significant increase in agreement that aviation security in NZ is world class since 2011. Also a higher proportion of NZ resident travellers think all flights in NZ should be screened than in 2014.

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

### Total agreement

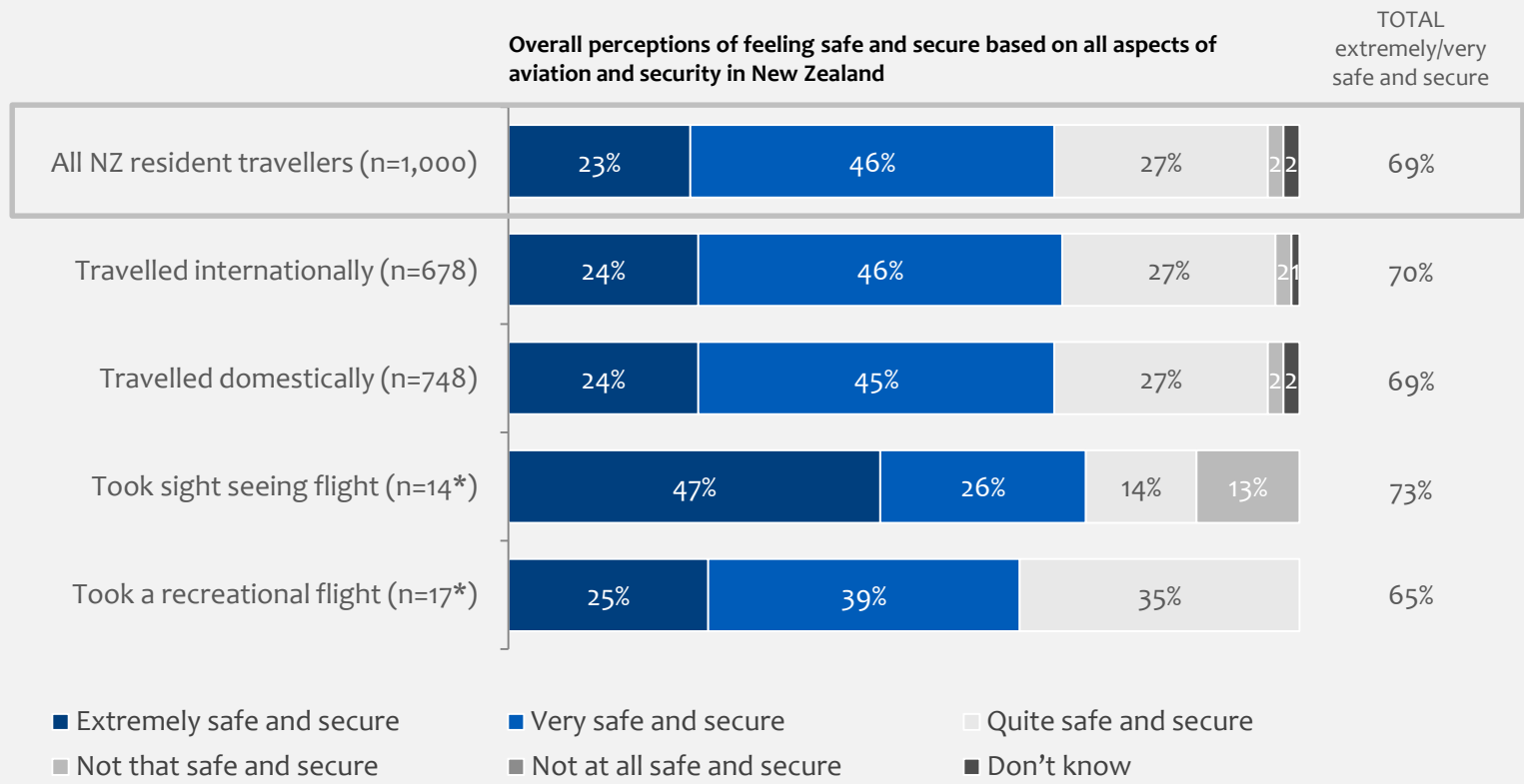
	2011	2012	2014	2017
I understand why my luggage and I undergo security screening before I board a flight	96%	98% ▲	97%	96%
I think all flights in NZ should be screened	71%	73%	70%	77% ▲
Airlines provide safety advice in a timely manner	70%	71%	73%	74%
Security staff at airports are friendly and helpful	72%	72%	69%	72%
Security staff at airports are approachable	66%	65%	66%	65%
Aviation security in New Zealand is effective	77%	76%	78%	77%
Aviation security in New Zealand is world class	52%	53%	57%	58%
Information about aviation security is easily accessible	44%	42%	46%	51% ▲
I know where to go for further information about aviation security	33%	37% ▲	39%	45% ▲

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

Perceptions of feeling safe and secure when considering all forms of flying undertaken including recreational or adventure aviation, is lower than when rating the most recent flight which is often on a commercial airline.



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 all aspects of New Zealand aviation safety and security into account, and thinking of all forms of flying they undertake almost seven in ten NZ resident travellers say they feel 'extremely' or 'very' safe and secure when flying.

Like in previous years, results for this question are lower than the comparable results relating to how safe and secure travellers felt on their most recent flight. This is likely to be because this question covers all types of flying undertaken (which could include sky diving or paragliding/hang gliding etc.) whereas the most recent flight was most often international or domestic travel on a commercial airline.

The results of those who've been on a sight seeing or recreational flight are not significantly different than the results of those who've travelled internationally or domestically on a commercial flight, however due to the small number of people who have taken an sight seeing or recreational flight their results are indicative only.

Base: All who have flown on each type of flight, 2017

\* Caution: Low base number results are indicative only. Results for commercial adventure flights are not shown due to very low base size.

There is an increased feeling of safety and security amongst those who've travelled internationally, all other results are consistent with 2014.

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

Total extremely/very safe and secure

	2011	2012	2014	2017
All NZ resident travellers	67%	67%	66%	69%
Travelled internationally	67%	68%	65%	70% ▲
Travelled domestically	67%	65%	66%	69%
Took a sight-seeing flight	74%	69%	58%	73%
Took a recreational flight	53%	48%	65%	65%

Bases: All resident travellers (2011 n=1,036; 2012 n=1,052; 2014 n=1,229; 2017 n=1,000), travelled internationally (2011 n=704; 2012 n=710, 2014 n=868; 2017 n=678), domestically (2011 n=833; 2012 n=765; 2014 n=920; 2017 n=748), taken a sight seeing flight (2011 n=24\*; 2012 n=39; 2014 n=41 2017 n=14\*), recreational flight (2011 n=33; 2012 n=18\*; 2014 n=33; 2017 n=17\*)

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



# Perceptions of sky diving



## KEY RESULTS

- 11% of NZ resident travellers have been sky diving in New Zealand, a similar proportion to 2014 (13%).
- 6 in 10 sky divers (61%) think the activity has some level of risk, a lower proportion than in 2014 (73%). Those who have never been sky diving in New Zealand are more likely than sky divers to think there is risk involved (87%), similar to 2014 (88%).
- Three quarters (75%) of sky divers feel safe and secure when flying or undertaking aviation activities in New Zealand, a higher proportion than in 2014 (61%).

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

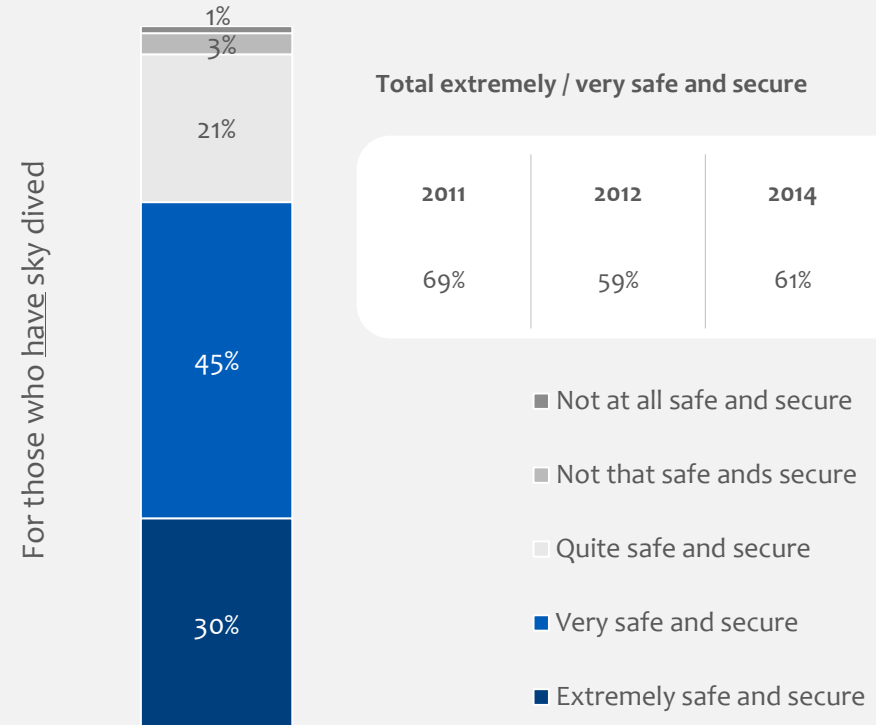
### PERCEIVED RISK OF SKY DIVING

	Have not sky dived (n=849)				Have sky dived (n=109)			
Extremely / very risky	50%				32%			
Quite risky	37%				29%			
Not that / not at all risky	13%				39%			
<b>Total extremely / very / quite risky</b>	<b>2011</b>	<b>2012</b>	<b>2014</b>	<b>2017</b>	<b>2011</b>	<b>2012</b>	<b>2014</b>	<b>2017</b>
	87%	86%	88%	87%	75%	64%	73%	61% ▼



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



Bases: Resident travellers who have not sky dived (2011 n=924; 2012 n=936; 2014 n=1,066; 2017 n=849), Resident travellers who have sky dived (2011 n=94; 2012 n=90; 2014 n=137; 2017 n=109). Don't know responses excluded

# Perceptions of recreational flying



## KEY RESULTS

- 13% of NZ resident travellers have undertaken recreational flying in New Zealand (e.g. in a microlight or an old aeroplane like a Tiger Moth).
- Almost half (49%) of those who have flown recreationally feel there is some degree of risk involved. People who have never been on a recreational flight are more likely to associate the activity with risk (72%).
- Two thirds (66%) of those who have been on a recreational flight feel 'extremely' or 'very' safe and secure when flying or taking part in aviation activities in New Zealand.
- Due to changes made to this category in 2017 (i.e. the inclusion of flying in a microlight), results have not been compared to previous years.

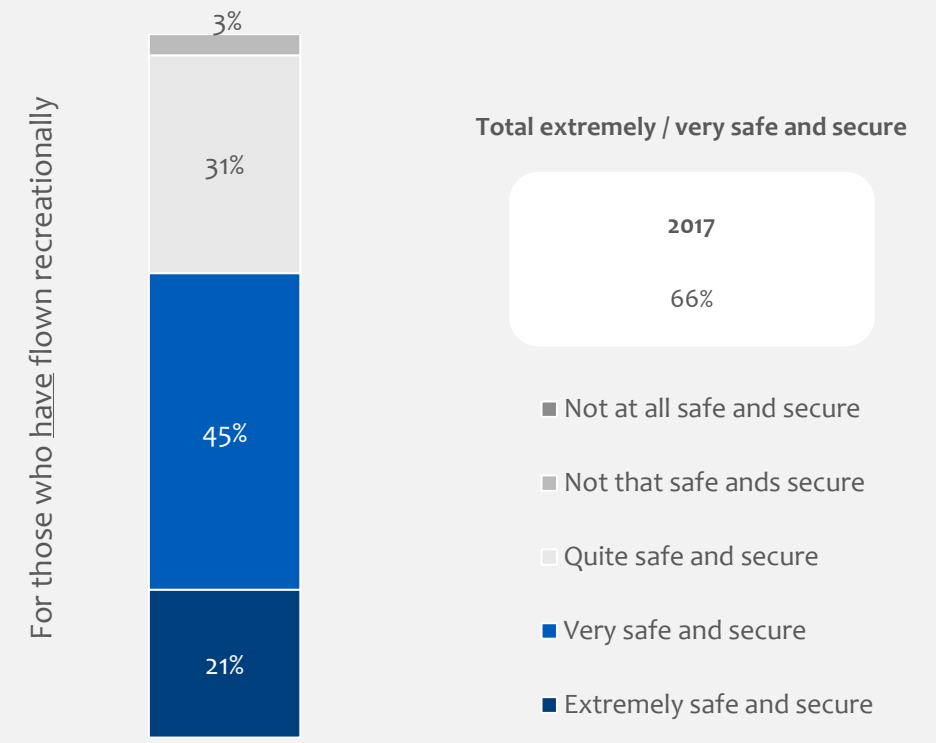
**Q** Q13. Please indicate how risky you think each of these activities is to the personal safety of the people that undertake them

PERCEIVED RISK OF RECREATIONAL FLYING	Have not flown recreationally (n=824)	Have flown recreationally (n=130)
Extremely / very risky	29%	17%
Quite risky	43%	32%
Not that / not at all risky	28%	51%
<b>Total extremely / very / quite risky</b>	<b>2017 72%</b>	<b>2017 49%</b>

Bases: Resident travellers who have not flown recreationally (2017 n=824), Resident travellers who have flown recreationally (2017 n=130). Don't know responses excluded

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

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



# Perceptions of gliding



## KEY RESULTS

- 7% of NZ resident travellers have been gliding in New Zealand.
- 4 in 10 (41%) of those who have been gliding think the activity has some level of risk. Those who have not participated in gliding in New Zealand are more likely to associate the activity with risk (70%).
- Almost 7 in 10 (69%) of those who have been gliding in New Zealand feel 'extremely' or 'very' safe and secure when flying or undertaking aviation activities in New Zealand.
- No significant changes since 2014.

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

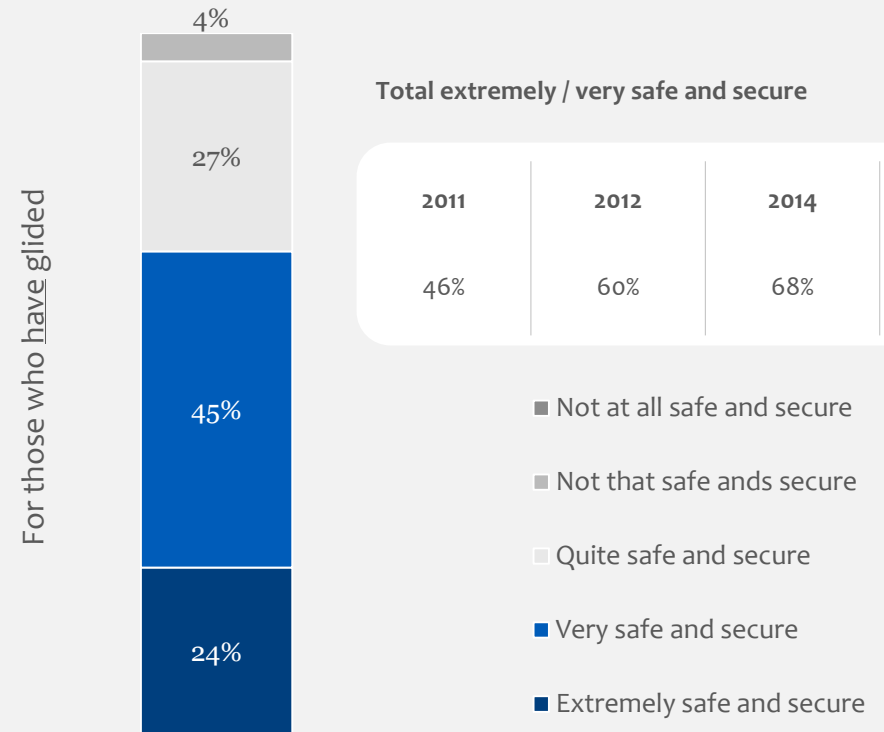
### PERCEIVED RISK OF GLIDING

	Have not glided (n=883)				Have glided (n=69)			
Extremely / very risky	28%				14%			
Quite risky	41%				27%			
Not that / not at all risky	30%				59%			
<b>Total extremely / very / quite risky</b>	<b>2011</b>	<b>2012</b>	<b>2014</b>	<b>2017</b>	<b>2011</b>	<b>2012</b>	<b>2014</b>	<b>2017</b>
	71%	69%	70%	70%	30%	36%	46%	41%



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

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



Bases: Resident travellers who have not glided (2011 n=939; 2012 n=927; 2014 n=1,082; 2017 n=883), Resident travellers who have glided (2011 n=71; 2012 n=88; 2014 n=102; 2017 n=69). Don't know responses are excluded

# Perceptions of flying in a helicopter



## KEY RESULTS

- 37% of NZ resident travellers have flown in a helicopter in New Zealand.
- 4 in 10 (43%) of those who have been on a helicopter flight in New Zealand think there is some degree of risk involved in the activity. Those who have not experienced a helicopter ride in New Zealand are more likely to consider it a risky activity (54%).
- Two thirds (66%) of those who have flown in a helicopter in New Zealand feel safe and secure when flying or taking part in aviation activities in New Zealand.
- Flying in a helicopter was included as a category for the first time in 2017.

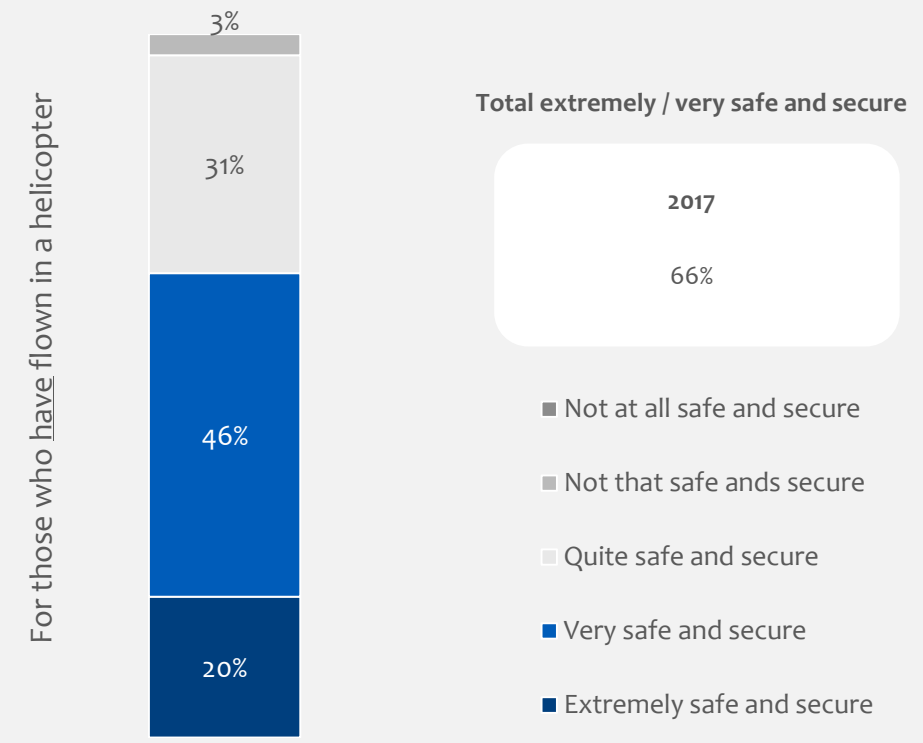
**Q** Q13. Please indicate how risky you think each of these activities is to the personal safety of the people that undertake them

PERCEIVED RISK OF FLYING IN A HELICOPTER	Have not flown in a helicopter (n=596)	Have flown in a helicopter (n=376)
Extremely / very risky	20%	13%
Quite risky	34%	30%
Not that / not at all risky	46%	57%
<b>Total extremely / very / quite risky</b>	<b>2017 54%</b>	<b>2017 43%</b>

Bases: Resident travellers who have not flown in a helicopter (2017 n=596), Resident travellers who have flown in a helicopter (2017 n=376). Don't know responses excluded

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

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



# Perceptions of paragliding / hang gliding



## KEY RESULTS

- 6% of NZ resident travellers have been paragliding or hang gliding in New Zealand.
- Three quarters (76%) of those who have been paragliding or hang gliding in New Zealand associate these activities with some amount of risk. People who have not been paragliding or hang gliding in New Zealand are more likely to think these activities involve risk (88%).
- Six in ten (62%) of those who have done paragliding or hang gliding in New Zealand feel 'extremely' or 'very' safe and secure about flying or participating in aviation activities.
- No changes since 2014.

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

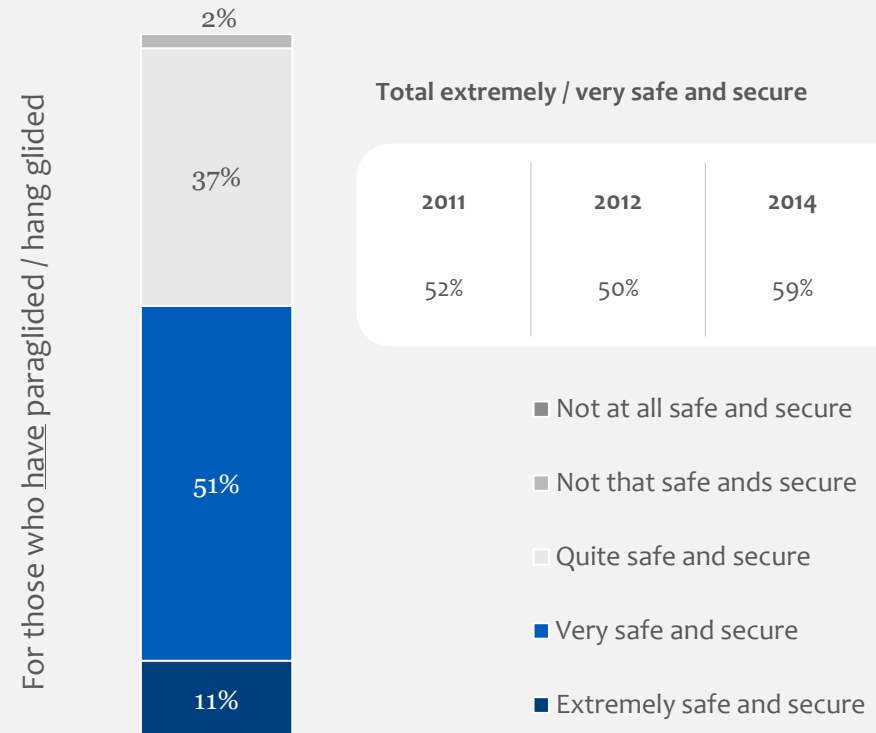
PERCEIVED RISK OF PARAGLIDING / HANG GLIDING	Have not paraglided / hang glided (n=899)	Have paraglided / hang glided (n=58)
Extremely / very risky	50%	31%
Quite risky	38%	45%
Not that / not at all risky	12%	24%
<b>Total extremely / very / quite risky</b>	<b>89%</b>	<b>75%</b>

	2011	2012	2014	2017
Have not paraglided / hang glided	89%	89%	89%	88%
Have paraglided / hang glided	75%	68%	75%	76%

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

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



Bases: Resident travellers who have not paraglided/hang glided (2011 n=968; 2012 n=982; 2014 n=1,133; 2017 n=899), Resident travellers who have paraglided/hang glided (2011 n=48; 2012 n=36; 2014 n=53; 2017 n=58). Don't know responses excluded

# Perceptions of drones, or unmanned aerial vehicles



## KEY RESULTS

- 79% of NZ resident travellers think that drones or unmanned aerial vehicles are a risk to aviation safety generally.
- Women are more likely than men to consider drones risky (83% vs. 75% of men).
- Younger travellers aged 18 to 24 years are less likely than average to think drones are risky (63%), whereas older travellers aged 65+ years are more likely than average to find them risky (88%).
- NZ resident travellers who have noticed something in the media recently about civil aviation safety and security in New Zealand are more likely to consider drones risky than those who have not noticed any coverage (81% vs. 75% of those who haven't seen media coverage). This likely reflects increased reporting of drone related incidents in the media in recent years.
- There is widespread acceptance that drone use near airports should be regulated, even among those who don't consider them to be particularly risky. Safety and invasion of privacy are the main concerns NZ resident travellers have about drones.



## SAFETY related comments made by those who consider drones or unmanned aerial vehicles to be 'extremely' or 'very' risky to aviation safety

All drones should have strict restrictions on the flight height and designated areas, as safety precautions, to merely avoid them interfering with other passenger aircraft. Those failing to adhere to these restrictions should be heavily penalised as lives will be at stake. *(Extremely risky)*

Guidelines should be clearly enforced for the use of drones near air corridors, flight paths and airports. Very high penalties should be given for breaches of these guidelines. *(Extremely risky)*

They are available to the general public whom don't always have a comprehensive understanding of aviation laws, or they just disregard them thinking there will be no consequences. *(Extremely risky)*

Unregulated and unmonitored use of drones has the potential to be very dangerous both from the perspective of using drones for intentional harm and also from harm caused by untrained and ignorant operators. *(Extremely risky)*

Drones have huge potential uses but carry risks from irresponsible use. Heavy consequences should be available as a deterrent for any misuse, e.g. flying near airports, airport approaches, or breaches of privacy. *(Quite risky)*

Most people who use them here (Queenstown) are from overseas and don't know CAA regulations. I don't like them by my home but I see them frequently flying in the flight path. *(Quite risky)*

I have seen drones being flown around the tall buildings in the Auckland CBD. Clearly, the operator would not have had line of sight on their drone. Drone usage within airplane flight path is potentially very dangerous. Anyone caught operating a drone inside restricted flight path areas should go straight to jail and not pick up \$200 if they pass go. *(Very risky)*



Q13a. Please indicate how risky you feel the use of drones is to aviation safety generally?

### PERCEIVED RISK OF DRONES / UNMANNED AERIAL VEHICLES

Extremely / very risky

Quite risky

Not that / not at all risky

**Total** extremely / very / quite risky

All NZ resident travellers  
(n=964)

42%

38%

21%

**2017**

79%

Bases: All NZ resident travellers (2017 n=964). Don't know responses excluded

## 66 SECURITY related comments made by those who consider drones or unmanned aerial vehicles to be 'extremely' or 'very' risky to aviation safety

They are a concern as when we are out we would have no idea if someone had been using a drone to check out our property, with a view to robbery or theft. *(Extremely risky)*

The laws and regulations need to be properly defined and communicated to all New Zealanders and tourists. Logging of the flight plans for drones is helpful, but most people want to use them on the spur of the moment and so will not be able to plan ahead which will cause numerous 'unlawful' flights. *(Very risky)*

They scare me. There have been several incidents recently where the drone user was untraceable. *(Extremely risky)*

It should be heavily regulated if not banned, for recreational use. It's not about being 'fun police' or being dictatorial, but about safety, privacy and law and order. It's not surprising criminals may start to use it for drug trafficking *(Quite risky)*

## 66 PRIVACY related comments made by those who consider drones or unmanned aerial vehicles to be 'extremely' or 'very' risky to aviation safety

Definitely needs to be strongly regulated for recreational users and people's personal privacy. Ideal for police use, civil defence, media and farmers particularly when surveying land after natural events. Useful gadget. *(Extremely risky)*

I believe they are a privacy concern. Anyone can buy them. They are a nuisance. People in my neighbourhood own them and drones can be seen at all hours; hovering over properties. *(Extremely risky)*

Needs regulating - can be extremely useful for businesses and recreational use but as always there will be a few individuals that abuse the use of them with spying etc. *(Extremely risky)*

Privacy and safety are an issue but they have opened up a new world of scenery for those hard to reach places. There is definitely a place for them. *(Extremely risky)*

They need to be banned unless you have a permit. They are annoying to the general public and an invasion of privacy if not used for the right purposes i.e. professional photography. *(Extremely risky)*

They are not toys and should be used by responsible adults only. They are an invasion of privacy if used over or near private property. *(Extremely risky)*

## 66 Comments made by those who consider drones or unmanned aerial vehicles to be 'not that' or 'not at all' risky to aviation safety

As long as appropriate laws and regulations are upheld around appropriate air space use and distances from airports, I don't see why they'd be much of a risk. *(Not at all risky)*

The drones should be used freely every where in NZ, but not in the airport areas. *(Not at all risky)*

Effective regulation such as geo-constraining would be more effective than current efforts. There seems to be a lot of perception about the safety risk rather than evidence. *(Not at all risky)*

Drones offer a service of inspection and accessibility that would not be possible by conventional aircraft, including helicopters. I doubt that the heights and areas that they are operating in offer any threat to either commercial or pleasure aviation. *(Not at all risky)*

I think it is reasonable to ban drones around airports, and for there to be certain restrictions around their use (e.g. a max altitude) but otherwise they are not much of a safety risk and a complex restrictive regime would be wasteful of time and money. *(Not at all risky)*

If well regulated and the rules of use are well understood and there is no risk to aircraft or to other activities, then I am all for the use of drones to enhance our lives. *(Not at all risky)*

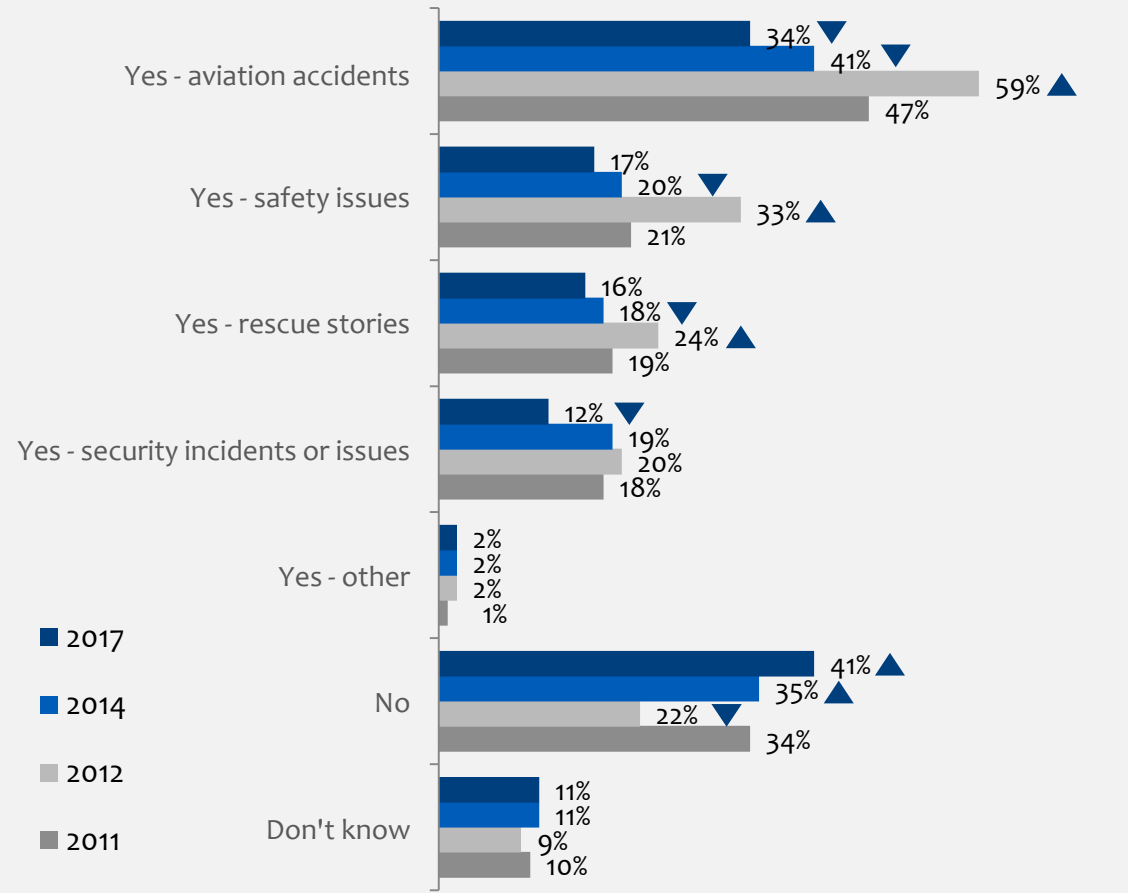
The drones we own have all come with in-depth safety operation manuals including where not to fly (i.e. within 5km of airports and not above 1000ft). If these were followed by everyone who had a drone it would not be an issue. The general public lacks a lot of knowledge around the aviation industry and some education could be beneficial on why the CAA does what they do and why the rules exist. An inherently dangerous activity has been turned into an exceptionally safety conscious one, so I see no issue with extending that. *(Not at all risky)*

# There has been a gradual decline in recall of New Zealand civil aviation safety and security media coverage over the past five years.



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

Recall of recent media coverage of civil aviation safety and security



Nett recall of recent media coverage:  
 2017 = 48% ▼  
 2014 = 54% ▼  
 2012 = 69% ▲  
 2011 = 56%

NZ resident travellers are less likely to say they've seen, read or heard something recently about civil aviation safety and security in New Zealand than in 2014 (48% in 2017, down from 54% in 2014).

Aviation accidents are still the main thing recalled, but less so than in 2014 (34% in 2017, down from 41% in 2014). There has also been a decline in recall of security incidents or issues (12% in 2017, down from 19% in 2014).

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

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

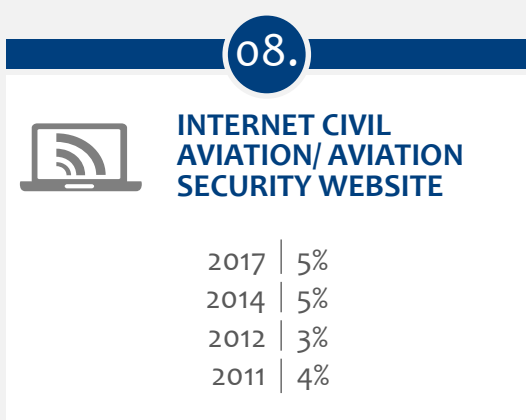
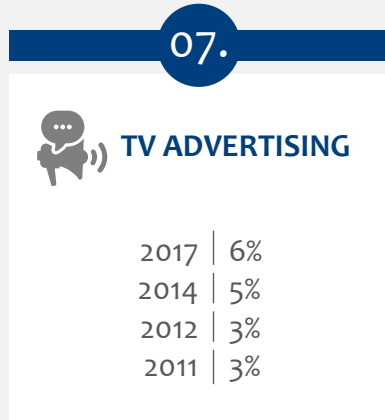
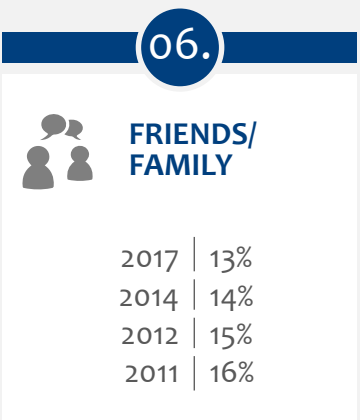
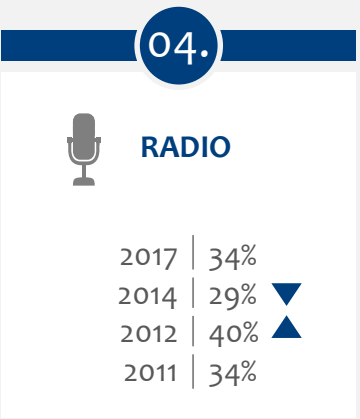
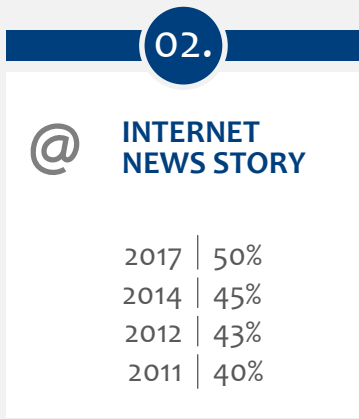
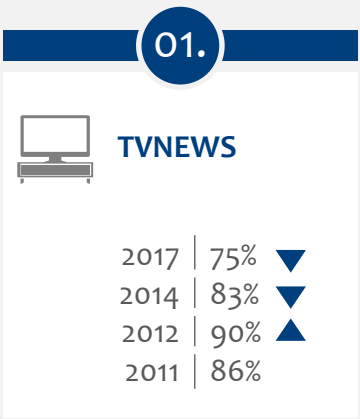


TV news is still the main source for information about civil aviation and security in New Zealand, but has continued to decline as a source over time. Almost two in ten NZ resident travellers had seen something about NZ civil aviation and security on social media.



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

Source of information about civil aviation and security in New Zealand



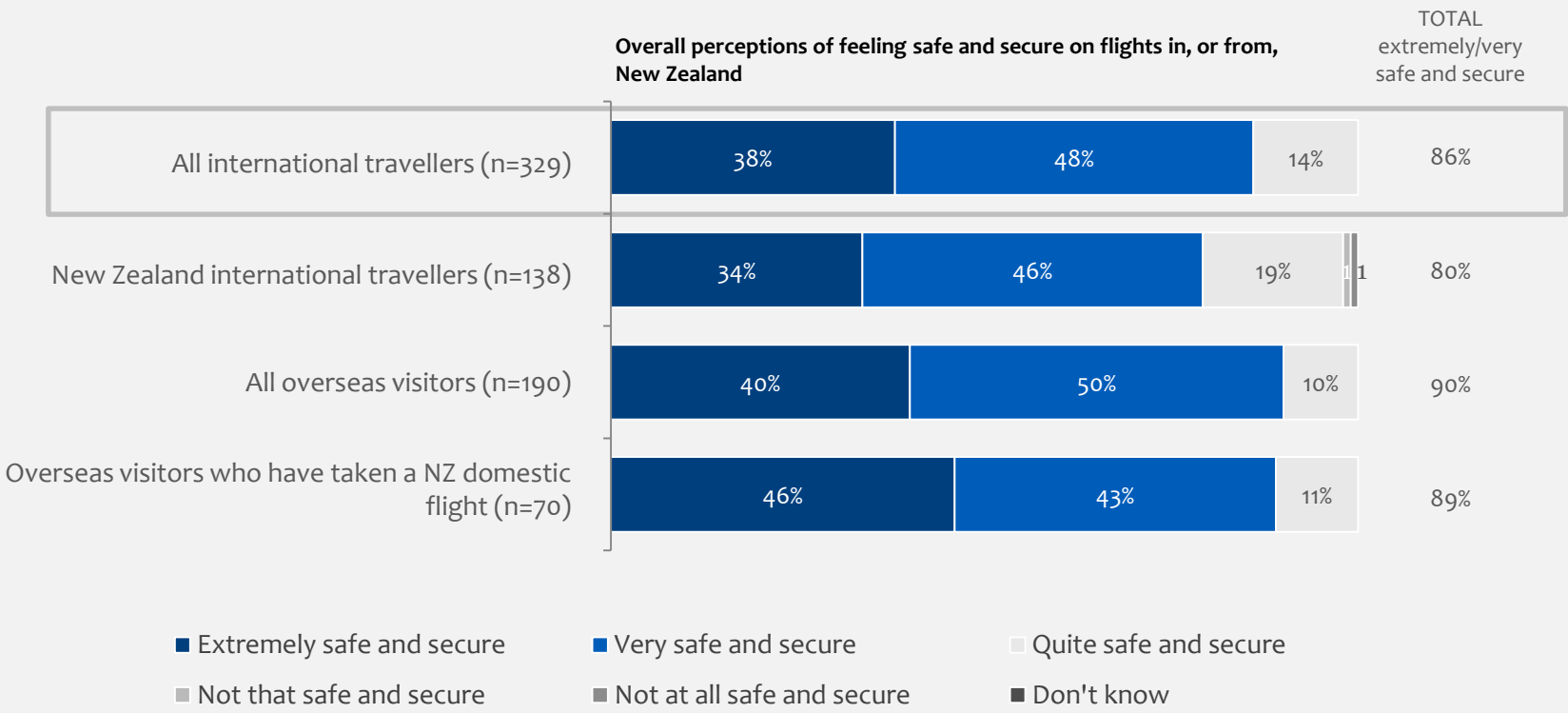
Base: All NZ resident travellers who have seen, heard or read anything about civil aviation and security recently (2011 n=585; 2012 n=762; 2014 n=687; 2017 n=480). Social media was added for the first time in 2017



# International traveller Survey results

# The vast majority of people travelling internationally from New Zealand feel 'extremely' or 'very' safe and secure when flying within or from New Zealand.

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



All groups of international travellers tend to feel highly safe and secure on flights within or from New Zealand. Overseas visitors are more likely to feel this way than those who live in New Zealand (90% vs. 80% respectively).

Only two international travellers (both based in New Zealand) indicated they feel unsafe, below are the reasons they gave.

*Don't like planes, flying in planes. Have so much weight up in the air. TV portrays them falling out of sky quite a bit. (Not at all safe and secure)*

*Because of the way of the world. Can put little things in laptops. If I didn't have grand children I wouldn't fly internationally. (Not that safe and secure)*

Base: All of each type of traveller, 2017

The high level of safety and security felt by international travellers on New Zealand domestic and international flights has been maintained over time.

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

Total extremely / very safe and secure

	2011	2012	2014	2017
All international travellers	83%	85%	88%	86%
New Zealand international travellers	80%	83%	83%	80%
All overseas visitors	86%	90%	92%	90%
Overseas visitors who have taken a New Zealand domestic flight	87%	96%	93%	89%

Bases: All international travellers (2011 n=310; 2012 n=325; 2014 n=327; 2017 n=329), New Zealand international travellers (2011 n=161; 2012 n=188; 2014 n=168; 2017 n=138), All overseas visitors (2011 n=149; 2012 n=137; 2014 n=159; 2017 n=190), Overseas visitors who have taken a NZ domestic flight (2011 n=47; 2012 n=54; 2014 n=44; 2017 n=70)

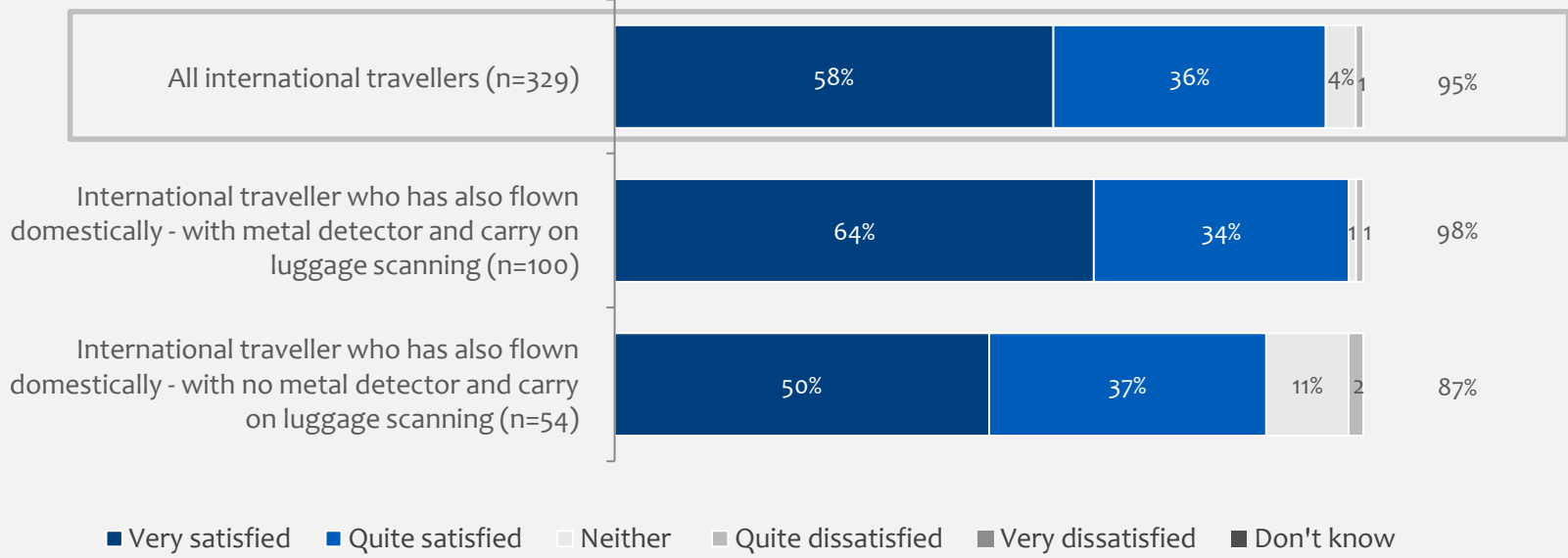
# Almost all international travellers are satisfied that the security measures experienced at New Zealand airports will keep them safe and secure for the duration of their flight.



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

Overall perceptions of security checks at New Zealand airports

TOTAL satisfied



International travellers who have flown domestically in New Zealand on flights without 'walk through' metal detectors and hand luggage screening are less satisfied that the security measures they experienced would keep them safe and secure, compared to those on domestic flights which included the pre-flight procedures.

Only three international travellers were dissatisfied that the security measures they went through in New Zealand airports would keep them safe and secure throughout their flight. Below are their reasons for feeling dissatisfied.

*Leaving Christchurch domestic airport I checked my suitcase in and there was no other security. I think they should scan everyone. (Quite dissatisfied)*

*Don't know...easy to go through check outs. (Quite dissatisfied)*

*Because I asked about why you can't have water - she explained why, cause I might make a bomb. The nice lady told me where to fill the water bottle but they never checked to see if I had anything hidden to make a bomb out of. I think it's weird I've had to tip out my water to refill when potentially I could have an opportunity to mix my bomb if I knew how. (Quite dissatisfied)*

Base: All who have flown on each type of flight, 2017

Over the years, international travellers have had a consistently high level of satisfaction with the effectiveness of security checks they went through 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?

Total satisfied

	2011	2012	2014	2017
All international travellers	94%	94%	93%	95%
International travellers who have also flown domestically – with metal detector and carry on luggage scanning	96%	95%	92%	98%
International travellers who have also flown domestically – with no metal detector and carry on luggage scanning	84%	93%	93%	87%

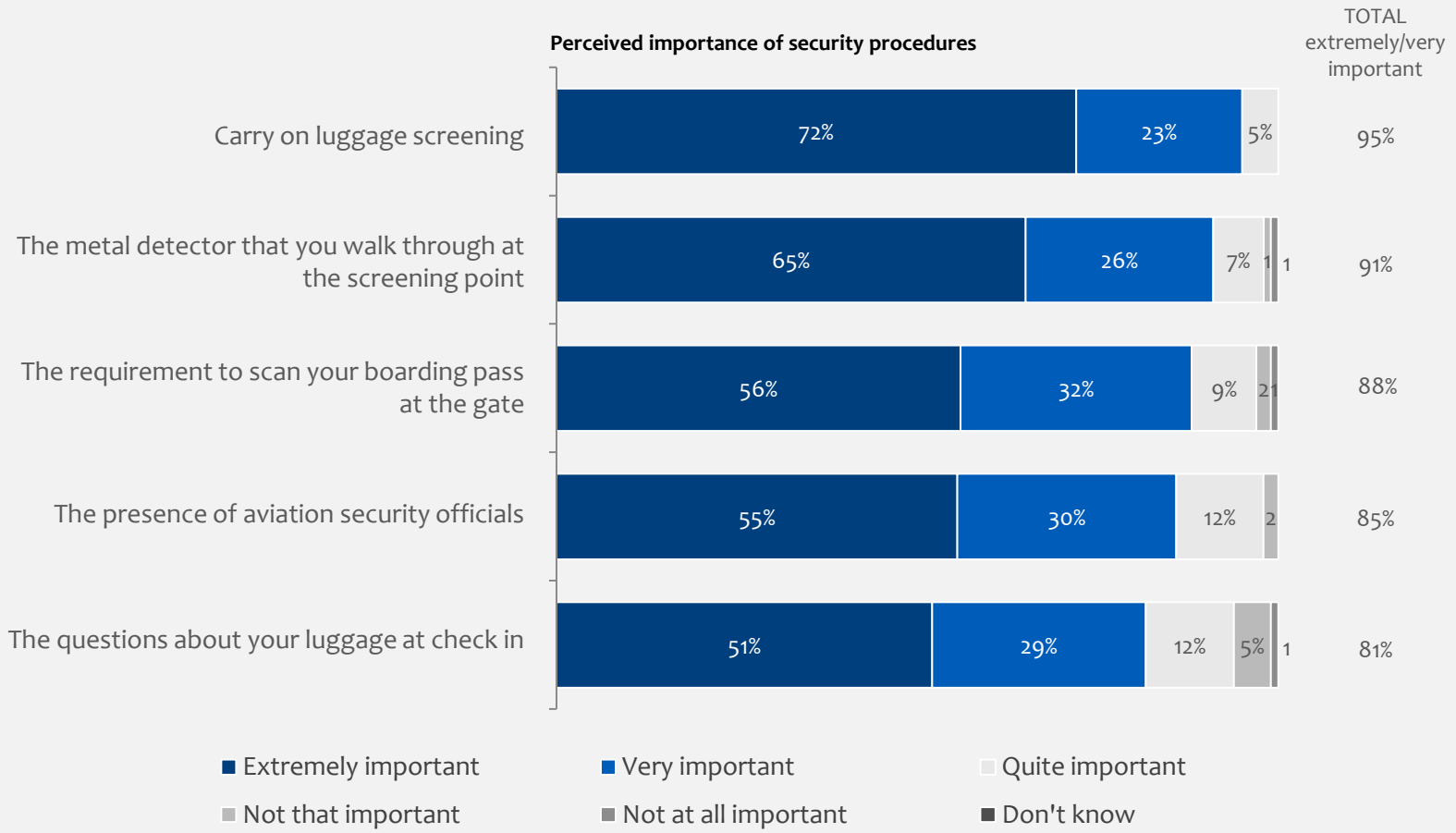
Bases: All international travellers (2011 n=310; 2012 n=325; 2014 n=327; 2017 n=329), international travellers who have also flown domestically – with metal detector and carry on luggage scanning (2011 n=103; 2012 n=115; 2014 n=86; 2017 n=100), international travellers who have also flown domestically – with no metal detector and carry on luggage scanning (2011 n=52; 2012 n=59; 2014 n=58; 2017 n=54)

Every pre-flight security procedure is considered highly important by most international travellers, especially carry on luggage screening and the ‘walk through’ metal detectors. Questions about luggage at check in are the least important procedure to them.



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

Perceived importance of security procedures



International travellers who live in New Zealand and those who live overseas rate the importance of each security procedure in a similar way.

Women are more likely than men to consider scanning your boarding pass at the gate to be highly important (95% vs. 83% of men).

Bases: All international travellers, 2017 (n=329)



International travellers' perceptions about the importance of each security procedure have remained fairly stable over time. Although there has been an increase in the proportion that consider scanning your boarding pass at the gate to be highly important since 2011 (from 79% up to 88% in 2017).



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

Total extremely / very important

	2011	2012	2014	2017
Carry on luggage screening	92%	93%	94%	95%
The metal detector that you walk through at the screening point	88%	92%	94%	91%
The requirement to scan your boarding pass at the gate	79%	82%	86%	88%
The presence of aviation security officials	89%	83%	88%	85%
The questions about your luggage at check-in	79%	76%	79%	81%

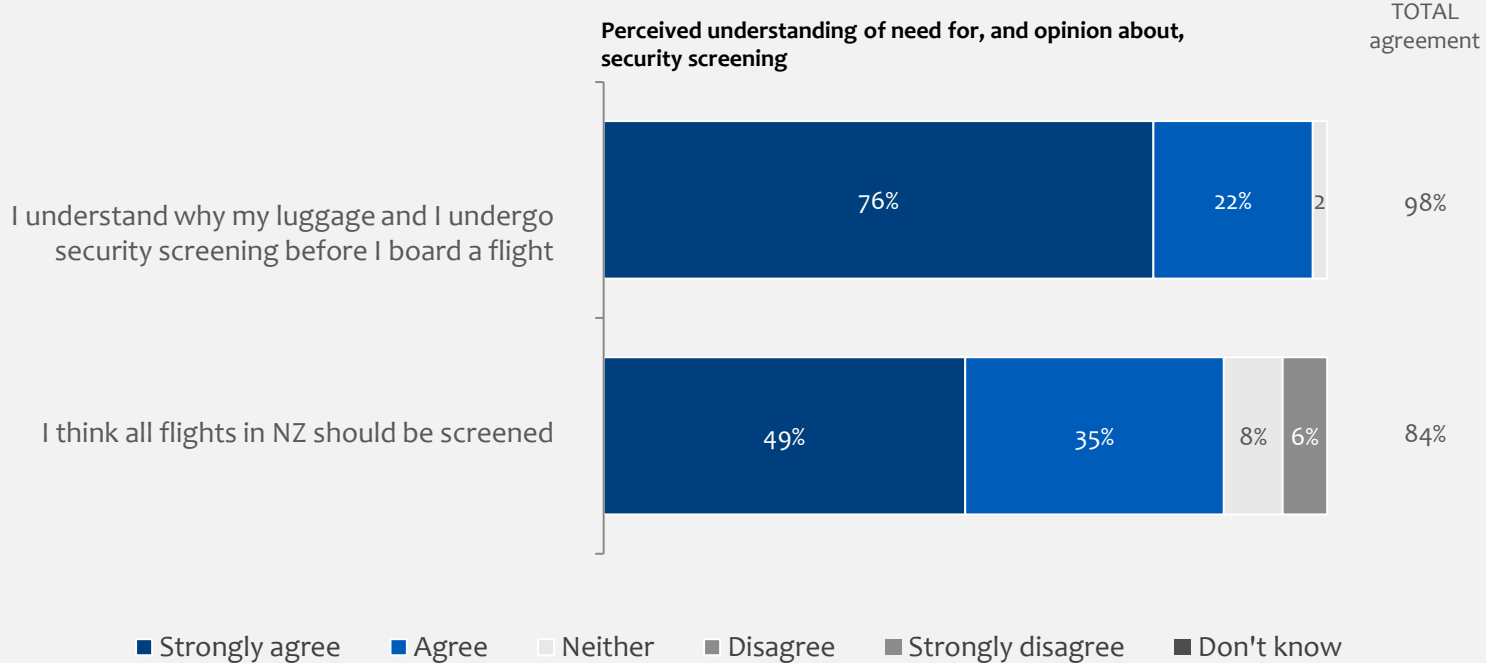
Bases: All international travellers (2011 n=310; 2012 n=325; 2014 n=327; 2017 n=329)



# Virtually all international travellers understand why the pre-flight personal security checks are required, and most think all New Zealand flights should be screened.



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



International travellers living in New Zealand and those based overseas are equally likely to agree with these statements.

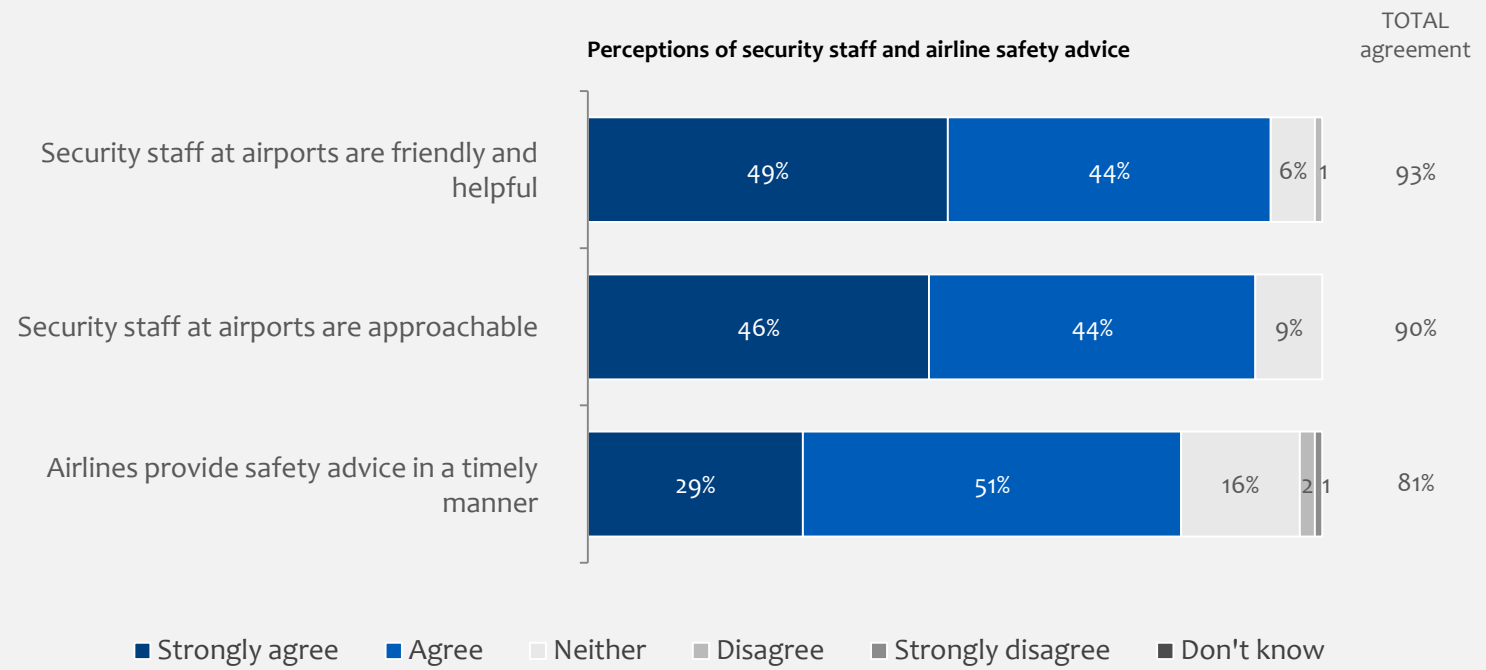
Base: All international travellers, 2017 (n=329)

Nearly all international travellers find the security staff at airports friendly, helpful and approachable. Most agree that airlines provide safety information in a timely manner.



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

Perceptions of security staff and airline safety advice

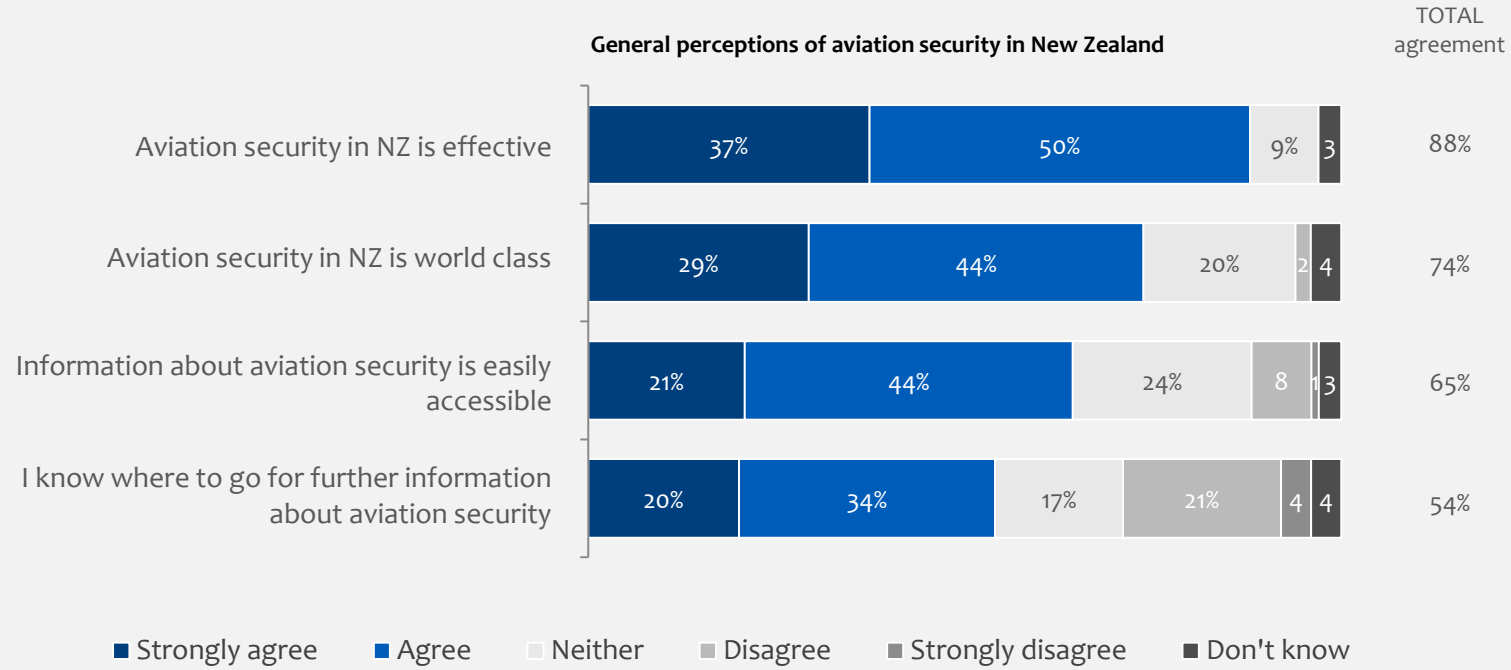


Those who have been on screened domestic flights within New Zealand are less likely to agree that the security staff at airports are approachable (84% vs. 94% of those on un-screened domestic flights).

Base: All international travellers, 2017 (n=329)

Most international travellers consider New Zealand’s aviation security to be effective, and three quarters believe it is world class. While more than half agree that information about aviation security is easily accessible and that they know where to go for further information about aviation security, these are the weakest areas overall.

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



There are no demographic differences in terms of agreement that aviation security in New Zealand is effective, and world class, or that information about aviation security is easy to access and that travellers know where to go for additional information about aviation security.

Base: All international travellers, 2017 (n=329)

There have been no significant changes in these results since 2014, they have generally remained consistent over time.

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

### Total agreement

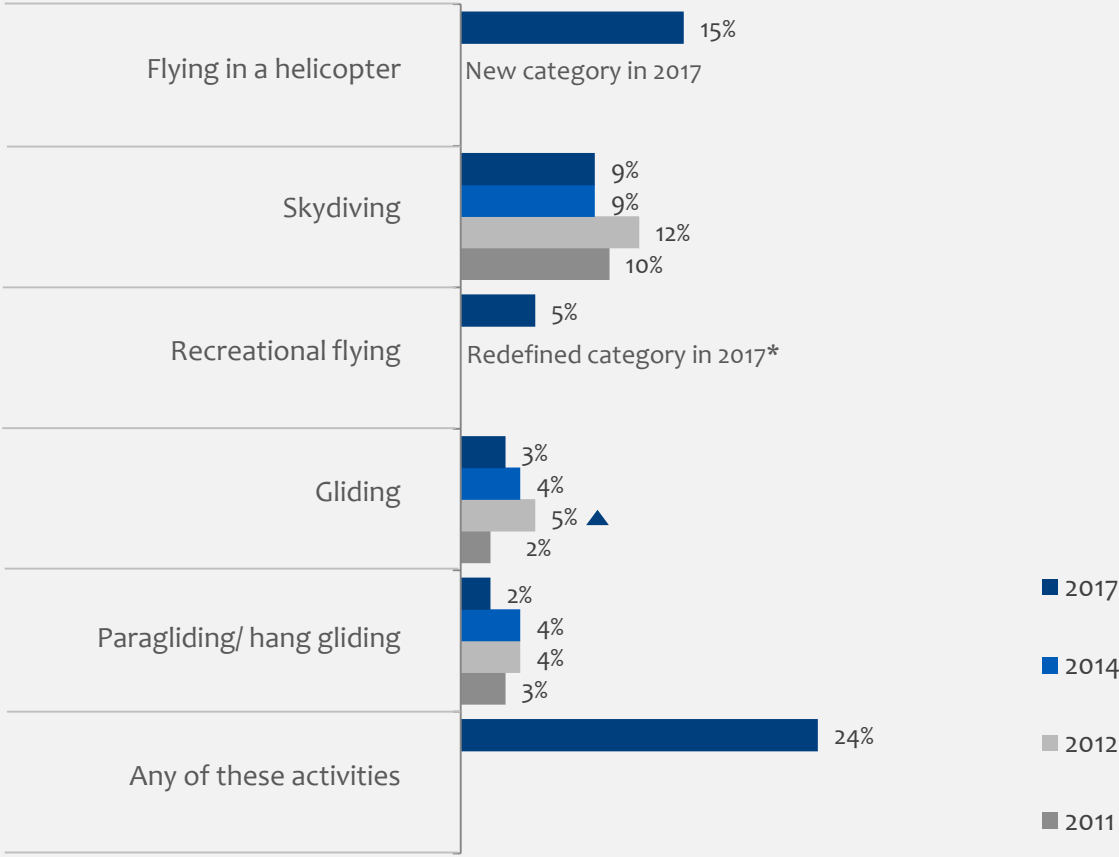
	2011	2012	2014	2017
I understand why my luggage and I undergo security screening before I board a flight	100%	99%	100%	98%
I think all flights in NZ should be screened	82%	80%	86%	84%
Security staff at airports are friendly and helpful	92%	93%	93%	93%
Security staff at airports are approachable	89%	90%	93%	90%
Airlines provide safety advice in a timely manner	80%	81%	83%	81%
Aviation security in New Zealand is effective	87%	85%	91% ▲	88%
Aviation security in New Zealand is world class	70%	73%	80% ▲	74%
Information about aviation security is easily accessible	60%	65%	61%	65%
I know where to go for further information about aviation security	50%	52%	51%	54%

Bases: All international travellers (2011 n=310; 2012 n=325; 2014 n=327; 2017 n=329)

Around one quarter of all international travellers have done at least one of the adventure or recreational aviation activities listed below. Flying in a helicopter is the main activity undertaken overall. Participation rates in the other activities are similar to 2014. Those who've done at least one activity feel highly safe and secure when flying or undertaking these types of activities.

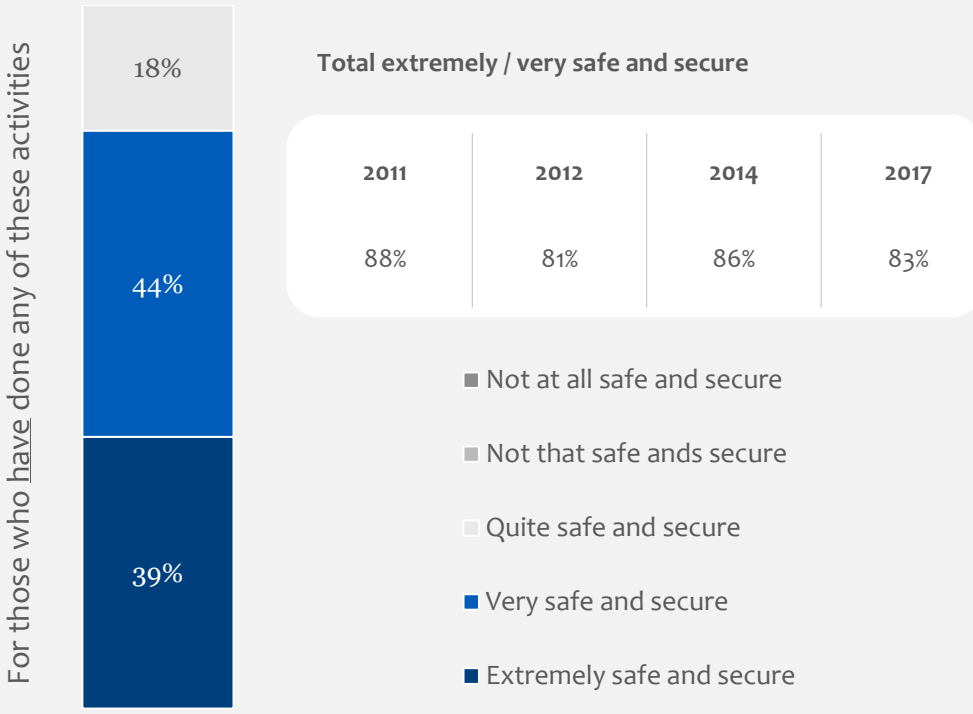


Q10. Have you ever undertaken any of the following activities in New Zealand?



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



Bases: All international travellers (2011 n=310; 2012 n=325; 2014 n=327; 2017 n=329)  
 \* In 2017 'flying in a microlight' was included as an example of 'Recreational flying'.

Base: Undertaken either sky diving, paragliding/ hang gliding, flying in a helicopter, gliding or recreational flying (2011 n=57; 2012 n=85; 2014 n=81; 2017 n=80)

In 2017 we asked all international travellers how risky they feel each adventure or recreational aviation activity is for those who take part in them. Activities considered most risky are paragliding/hang gliding and sky diving. Whereas flying in a helicopter is considered the least risky activity by far. On the following pages, where the base numbers are adequate, a comparison of the perceptions of participants versus non participants in these activities is provided.



Q11a. Please indicate how risky you think each of these activities is to the personal safety of the people that undertake them

	Flying in a helicopter	Sky diving	Recreational flying	Gliding	Paragliding/hang gliding
Extremely / very risky	16%	58%	37%	35%	57%
Quite risky	27%	24%	36%	37%	29%
Not that / not at all risky	57%	19%	27%	28%	14%
<b>Total</b> extremely / very / quite risky	<b>43%</b>	<b>81%</b>	<b>73%</b>	<b>72%</b>	<b>86%</b>

Bases: All international travellers, 2017 (Flying in a helicopter n=324; Sky diving n=328; Recreational flying n=326; Gliding n=323; Paragliding/hang gliding n=323). Don't know responses excluded

# Perceptions of flying in a helicopter



## KEY RESULTS

- 4 in 10 (40%) of those who have been on a helicopter flight in New Zealand think there is some degree of risk involved in the activity, a similar proportion of those who have not experienced a helicopter ride in New Zealand feel this way (43%).
- Three quarters (76%) of international travellers who have flown in a helicopter in New Zealand feel safe and secure when flying or taking part in aviation activities in New Zealand.
- Flying in a helicopter was included as a category for the first time in 2017.

**Q** Q11a. Please indicate how risky you think each of these activities is to the personal safety of the people that undertake them

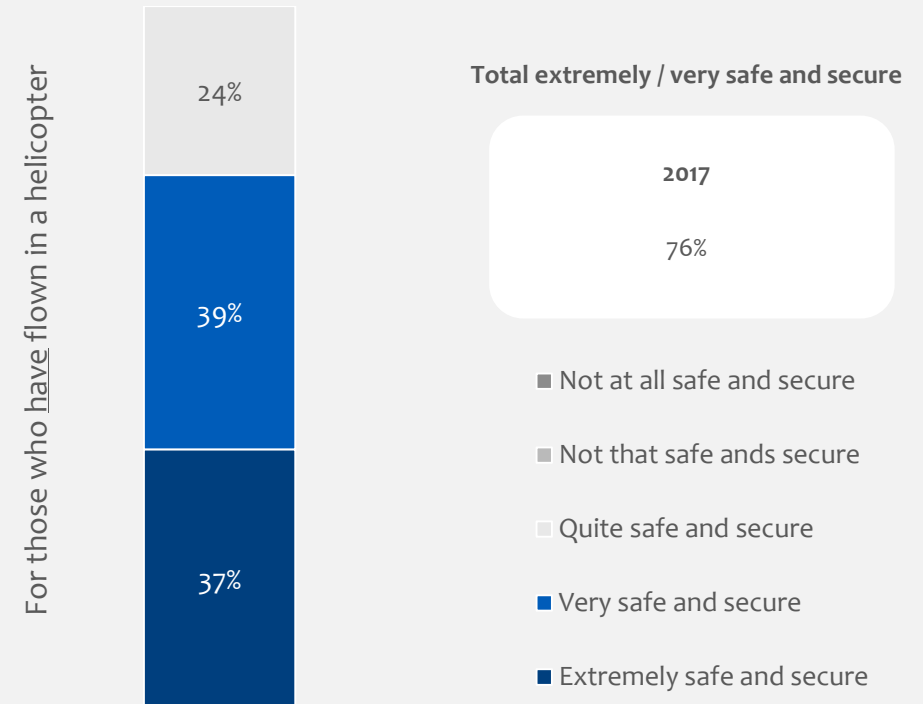
PERCEIVED RISK OF FLYING IN A HELICOPTER	Have not flown in a helicopter (n=277)	Have flown in a helicopter (n=47)
Extremely / very risky	16%	17%
Quite risky	27%	23%
Not that / not at all risky	57%	60%
<b>Total extremely / very / quite risky</b>	<b>2017 43%</b>	<b>2017 40%</b>

Bases: International travellers who have not flown in a helicopter (2017 n=277), International travellers who have flown in a helicopter (2017 n=47). Don't know responses excluded



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 mentioned in the last question?

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



# Perceptions of sky diving



## KEY RESULTS

- 6 in 10 international travellers who have sky dived in New Zealand (61%) think the activity has some level of risk. Those who have never been sky diving in New Zealand are more likely than sky divers to think there is risk involved (83%). Perceived risk of sky diving was included for the first time in 2017.
- Almost 9 in 10 (86%) of sky divers feel safe and secure when flying or undertaking aviation activities in New Zealand, the same proportion as in 2014.

**Q** Q11a. 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

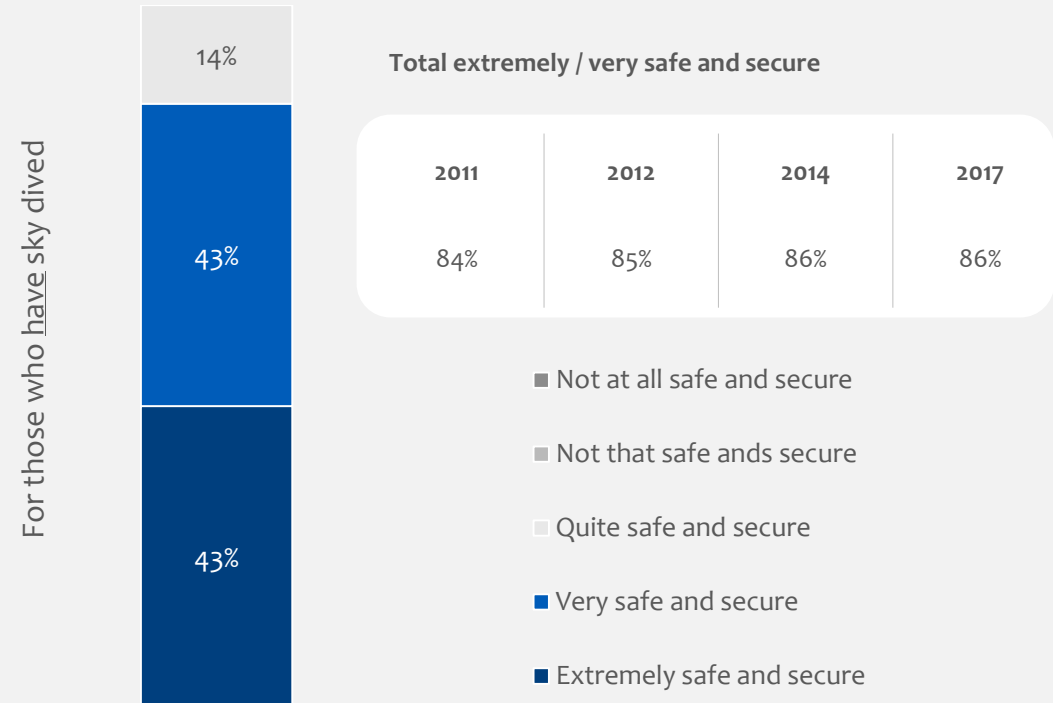
	Have not sky dived (n=300)	Have sky dived (n=28*)
Extremely / very risky	60%	29%
Quite risky	23%	32%
Not that / not at all risky	17%	39%
<b>Total extremely / very / quite risky</b>	<b>2017 83%</b>	<b>2017 61%</b>

Bases: International travellers who have not sky dived (2017 n=300), international travellers who have sky dived (2011 n=32; 2012 n=40; 2014 n=28\*; 2017 n=28\*). Don't know responses excluded  
 \* Caution: Low base number, results are indicative only



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 mentioned in the last question?

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







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