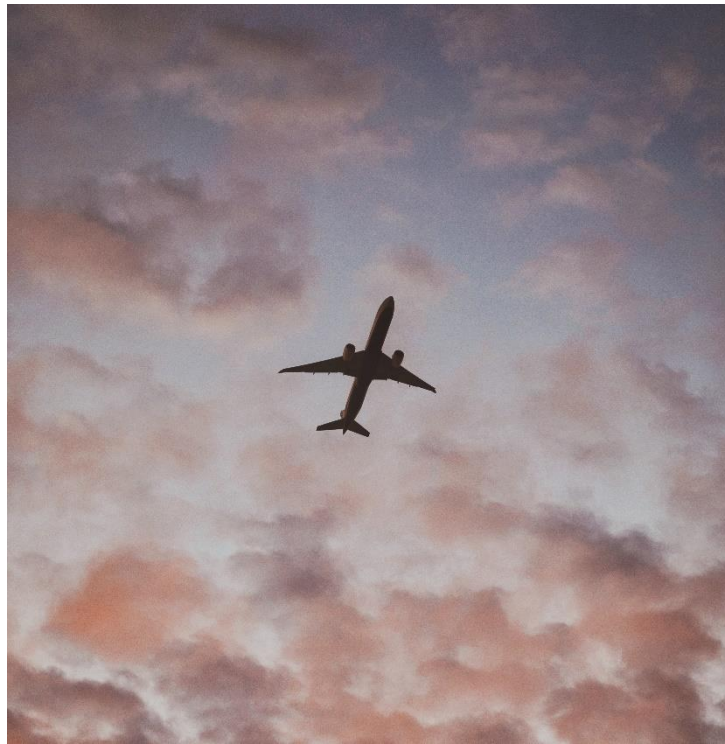


PROJECT FEEL SAFE

June 2019

*Research report prepared for the Civil Aviation
Authority including the Aviation Security Service*



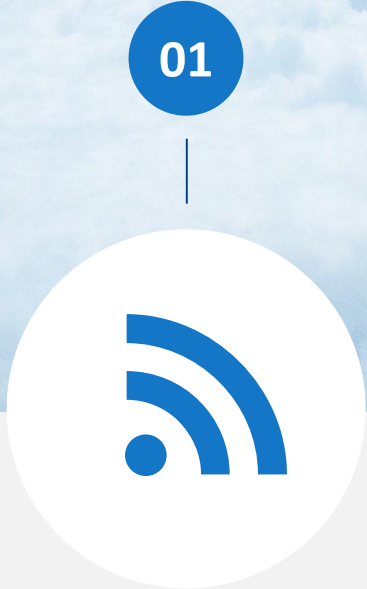
COLMAR BRUNTON
A Kantar Company

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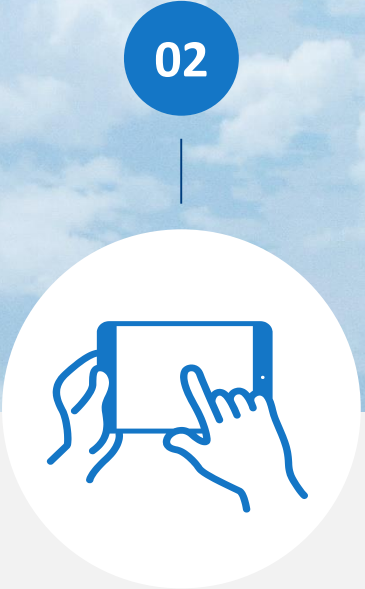


01	Research programme, objectives and context	3-5
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Research programme



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



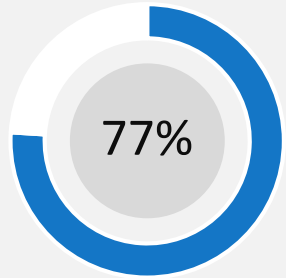
provide demographic sub-group analysis to allow for more detailed analysis of user's perceptions.

Putting the survey results into context

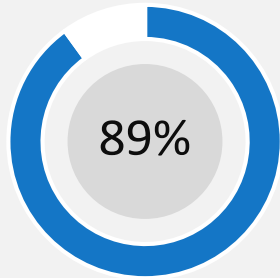
Recent events covered by the New Zealand media that may have influenced ‘perceptions of safety’ in 2019 include:

- Police issued warning about the dangers of drones, after near misses with helicopters on New Year’s Eve *(January 2019)*.
- A 19-year old was charged following an incident at Auckland Airport that caused disruptions for many. They were removed from an Air New Zealand flight after they claimed to have a bomb *(January 2019)*.
- A man was airlifted to hospital with serious injuries following a paragliding accident near Wanaka *(January 2019)*.
- One person was injured after a helicopter crash north of Taupō *(January 2019)*.
- A student pilot crashed a one-seater plane during their first solo flight. They sustained no injuries *(January 2019)*.
- A flight from Auckland to Queenstown wound up back in Auckland following strong tailwinds preventing it from landing. This resulted in passengers having to pay for expensive taxi rides to and from Auckland Airport, and some missing a day’s work *(February 2019)*.
- An Air New Zealand flight bound for Shanghai was diverted back to Auckland, after it was found that the aircraft did not have a permit to land. Sources later said that this may also have been due to the paperwork referring to Taiwan. Mainland China refuses to have any relations with countries which recognise Taiwan as an independent state *(February 2019)*.
- A helicopter pilot had a lucky escape from a crash while fighting the Tasman fires *(February 2019)*.
- A seaplane crashed into the Auckland harbour. The sole occupant escaped without serious injury *(February 2019)*.
- There was a delay at the domestic terminal at Auckland Airport due to a passenger forgetting their mobile phone on a plane. Security screening was halted for the 40 minutes while the incident took place *(February 2019)*.
- A paraglider was seriously injured after crashing near Raglan *(February 2019)*.
- A paraglider crashed near Mt Cheeseman in Canterbury and walked to safety after spending the night in the bush *(March 2019)*.
- A skydiving instructor died after receiving critical injuries following a skydiving accident at Parakai, north of Auckland *(March 2019)*.
- In the wake of the Christchurch terror attacks, Christchurch Airport increased their security presence, with Air New Zealand introducing baggage screening on regional flights from the city *(March 2019)*.
- The Boeing 737 Max 8 model planes were banned from multiple countries, including New Zealand, after two fatal crashes involving the planes in five months *(March 2019)*.
- Two experienced flight instructors died following a light aircraft crash in the Kaimanawa Ranges *(March 2019)*.
- The Civil Aviation Authority ruled that a crash involving a journalist in March 2018 was not caused by a drone *(April 2019)*.
- A trio of helicopter passengers were found alive after their helicopter crashed at sea near the Auckland Islands, in what was called a ‘miracle survival.’ *(April 2019)*.
- Four people stranded atop an overturned 4WD in the flooded Hopkins River in the Mackenzie area were rescued by helicopter *(April 2019)*.
- After reportedly refusing to pay attention to the airline safety briefing, two passengers were escorted from an Air New Zealand flight *(May 2019)*.
- A Westpac Rescue Helicopter winched two people to safety after their yacht got into difficulty in Sleepy Bay near Banks Peninsula *(May 2019)*.

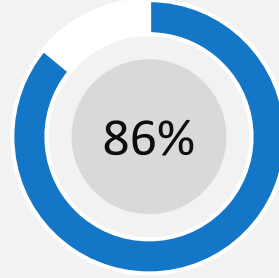
Key results



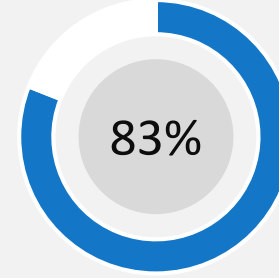
of **NZ resident travellers** felt extremely or very safe and secure on their most recent domestic or international flight
(No significant change since 2017)



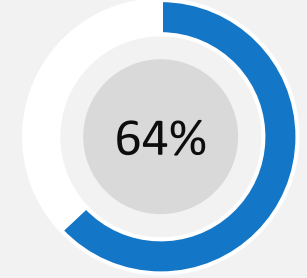
of **overseas visitors** feel extremely or very safe and secure on domestic or international flights departing from New Zealand
(No significant change since 2017)



of people flying to overseas destinations from New Zealand feel safe
(No significant change since 2017)



of people flying on screened domestic routes feel safe
(No significant change since 2017)



of people flying on non-screened domestic routes feel safe
(No significant change since 2017)

SUMMARY

Method: Online survey of 1,042 NZ resident travellers. Intercept survey of 302 International travellers at Auckland and Wellington airports.

Fieldwork: 29 April to 12 May

Demographic results: Findings for sub-groups of travellers can be found in the report.

HOW SAFE AND SECURE TRAVELLERS FEEL WHEN FLYING

Most travellers felt 'extremely' or 'very' safe and secure on their most recent flight within or from New Zealand.

Nearly...



9 in 10
International travellers did



8 in 10
NZ resident travellers did

These results are consistent with previous years.

NZ resident travellers continue to feel highly safe and secure due to...

Pre-flight security screening they experience and their trust in its effectiveness

22%

Professional, well trained, competent airline staff, pilots and cabin crew

12%

The calm, friendly, helpful nature of airport staff and cabin crew

9%

Their trust in the airline due to its good safety record and reputation

7%

PERCEPTIONS ABOUT SECURITY SCREENING AT AIRPORTS

Almost all International travellers and most NZ resident travellers feel satisfied that the security screening they go through in New Zealand will keep them safe during their flight.

Over...

9/10

International travellers are satisfied

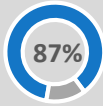
8/10

NZ resident travellers are satisfied

But NZ resident travellers on unscreened domestic flights still feel significantly **less** satisfied the security measure would keep them safe than those on screened domestic flights.



of those on unscreened domestic flights are satisfied



of those on screened domestic flights are satisfied

There is an **increasing** desire from NZ resident travellers for all New Zealand flights to be screened (71% in 2011 vs. 79% in 2019).

The perceived threat to New Zealand has increased during this time.



Comment from 2011

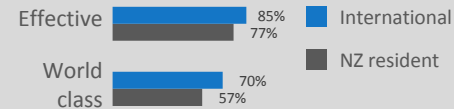
"I don't think we are at great risk, here in New Zealand, so I don't worry about terrorist bombs, or whatever..."

Comment from 2019

"I think even domestic flights need some kind of screening of baggage... are terrorists and nutters not flying regionally?"

While most travellers consider aviation security in New Zealand to be effective, a smaller majority think it is world class.

International travellers are **more** likely than NZ residential travellers to agree that aviation security in this country is...



Security staff at New Zealand airports are seen as friendly, helpful and approachable by around...

9/10 International travellers **7/10** NZ resident travellers

International travellers are significantly more likely to rate the staff highly than NZ resident travellers, but they too are generally happy.

"I felt that security had done their job, and whilst it's a necessary evil, NZ security staff are way friendlier than the TSA that I had to deal with at the other end of my flight." (NZ resident traveller)

Virtually all International and NZ resident travellers understand why they and their luggage undergo pre-flight screening.

Travellers say all security checks are highly important, but especially these two...

Carry-on luggage screening

93% of International travellers and **85%** of NZ resident travellers think it's 'extremely' or 'very' important

Walk-through metal detectors at screening points

91% of international travellers and **83%** of NZ resident travellers think it's 'extremely' or 'very' important

SUMMARY

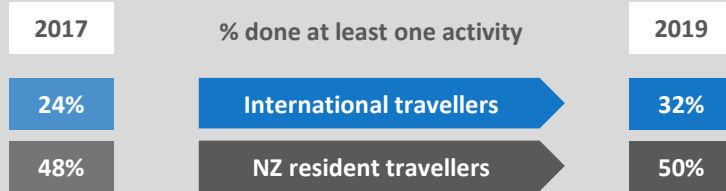
Method: Online survey of 1,042 NZ resident travellers. Intercept survey of 302 International travellers at Auckland and Wellington airports.

Fieldwork: 29 April to 12 May

Demographic results: Findings for sub-groups of travellers can be found in the report.

ADVENTURE AND RECREATIONAL AVIATION PARTICIPATION AND PERCEPTIONS

More NZ resident than international travellers have taken part in adventure or recreational aviation in New Zealand i.e. sky diving, helicopter flying, gliding, paragliding or hang gliding, or recreational flying (e.g. in a microlight or tiger moth). But a higher proportion of international travellers have than in 2017.

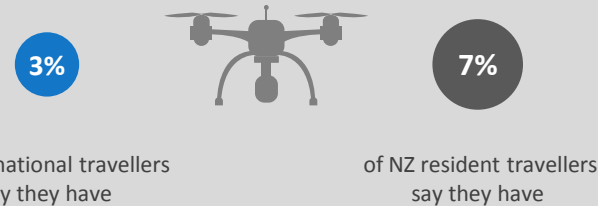


For both international and NZ resident travellers helicopter flying remains the most common activity and is considered the least risky. Whereas paragliding, hang gliding and sky diving are the least common activities and rated the most risky.

Participants in each activity continue to consider them **less** risky than non-participants.

When NZ resident travellers think about all aspects of aviation safety and security in New Zealand and any adventure or recreational flying they have done they rate their feeling of safety and security while flying lower than when only thinking of their last flight which was usually with a commercial airline. International travellers feel equally safe and secure regardless of the type of flying.

Few NZ residents and international travellers have operated a remotely piloted aircraft system (a drone) in New Zealand.



Almost...

9 in 10 NZ resident travellers think that drone use poses at least some risk to aviation security



6 in 10 think drones are 'extremely' or 'very' risky

Safety and privacy invasion are still the primary concerns NZ resident travellers have about drones. Some would like tighter regulation, stronger enforcement and tougher penalties for those who break the rules. Registration of drones and more training for their users are also suggested. This appears to be directed at recreational users rather than commercial, as some see the value of professional drone use.

INFORMATION ABOUT AVIATION SECURITY

NZ resident travellers are more likely to have recently seen, read or heard something about civil aviation safety and security in New Zealand than in 2017.



The main source of information continues to be TV news, newspaper stories are a less common source than in 2017.



Around half of NZ resident travellers say information on aviation security is easily accessible, but less than that know where to go for further information.



International travellers are **more** likely to know how to access this information and consider it easy to do so, but this remains an area for improvement.

SUMMARY



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Fieldwork: 29 April to 12 May

Demographic results: Findings for sub-groups of travellers can be found in the report.

DANGEROUS GOODS AND PROHIBITED ITEMS



Both NZ resident and international travellers could be better informed about the rules around dangerous goods and prohibited items in luggage.

Only...



5/10

NZ resident travellers



3/10

International travellers

know the rules for what can or cannot be packed in carry-on or checked-in bags for domestic and International flights are **different**.

CAA should prioritise raising awareness among **International travellers** that on international flights from New Zealand...



E-cigarettes cannot be placed in checked in luggage (Only 41% know this)

Among **NZ resident travellers** CAA should prioritise raising awareness that on both domestic flights and international flights from New Zealand...



E-cigarettes cannot be placed in checked in luggage (Just 40% know this about domestic flights and 45% about international flights)

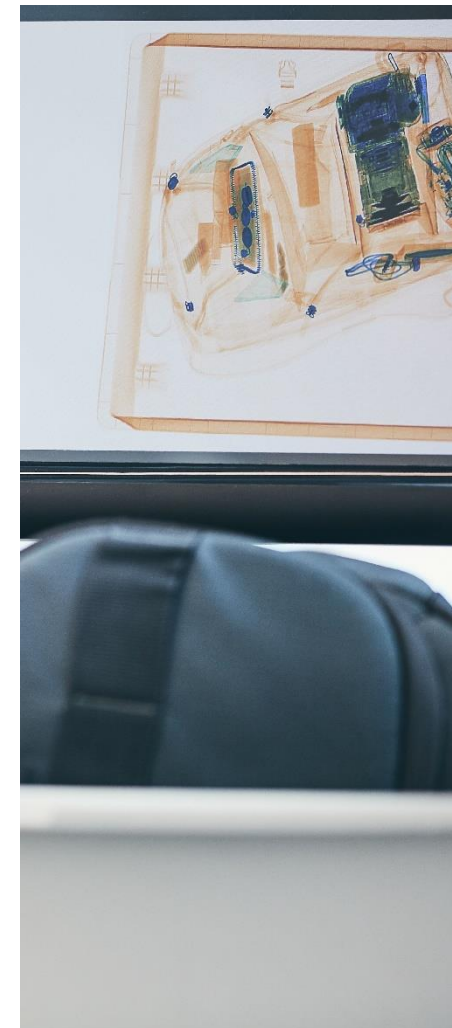


Power Banks (a portable battery) cannot be placed in checked in luggage (Just 34% know this about domestic flights and 40% about international flights)

NZ resident travellers also need to be made aware that on international flights you cannot place the following in your carry on bag...



A snow globe (Only 47% know this)



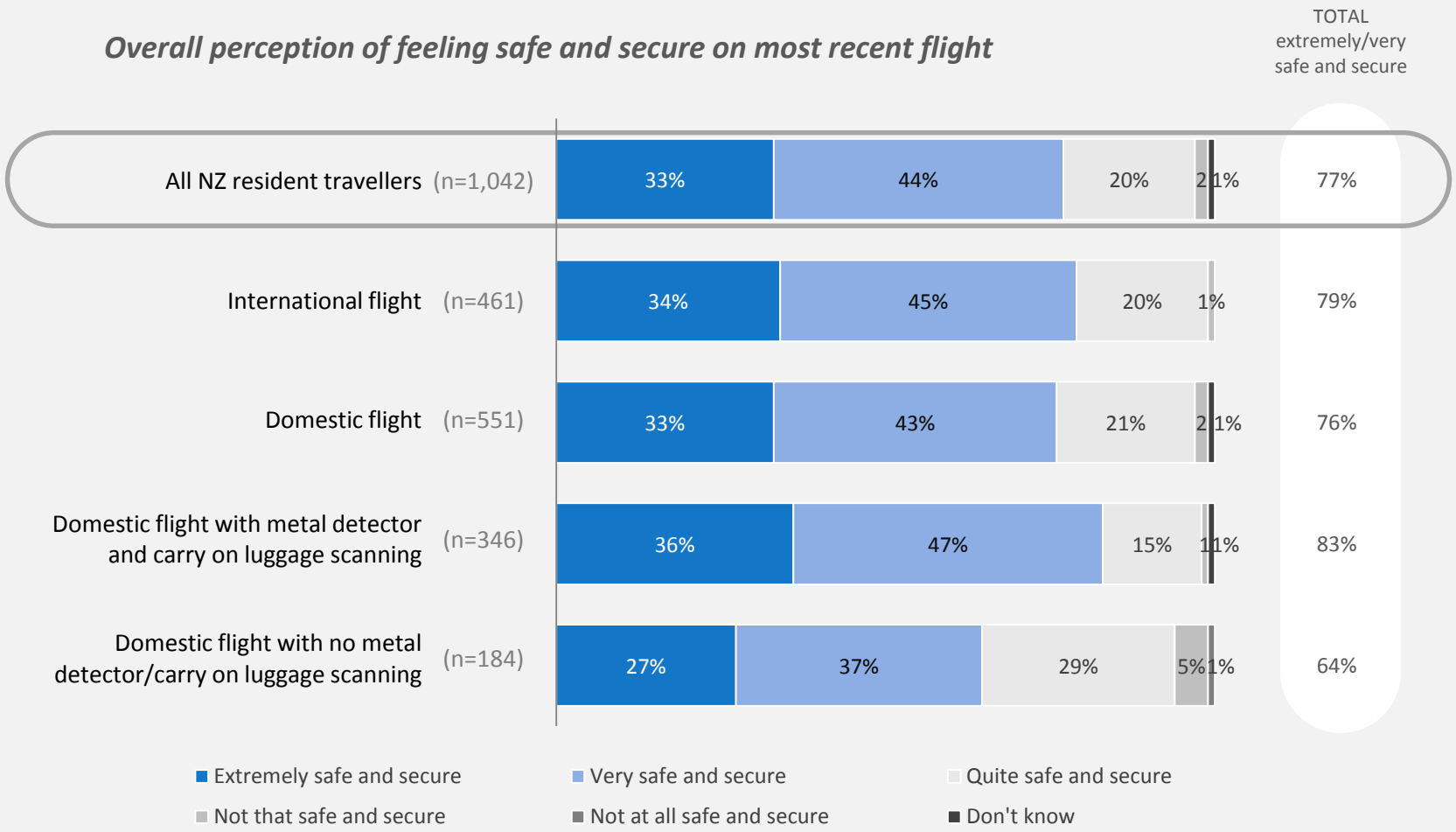


New Zealand Resident Traveller Survey results



Almost eight in ten 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?



NZ travellers more likely to feel 'extremely' or 'very' safe and secure include:

Domestic flight passengers who experience personal security checks before boarding i.e. walk through a metal detector and have their hand-luggage scanned (83% vs. 64% of domestic flight passengers who don't experience those pre-flight checks)

Those who have seen, read or heard something about New Zealand civil aviation safety and security recently (80% vs. 73% of those who have not noticed anything)

Younger passengers aged 18 to 24 years (85% vs. 76% of 25+ year olds)

While perceptions of safety and security on the most recent flight are similar to 2017, they have improved over time. A significantly higher proportion of NZ resident travellers felt 'extremely' or 'very' safe and secure on their most recent flight in 2019 than in 2011. Improvement is most evident for passengers on screened domestic flights.

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

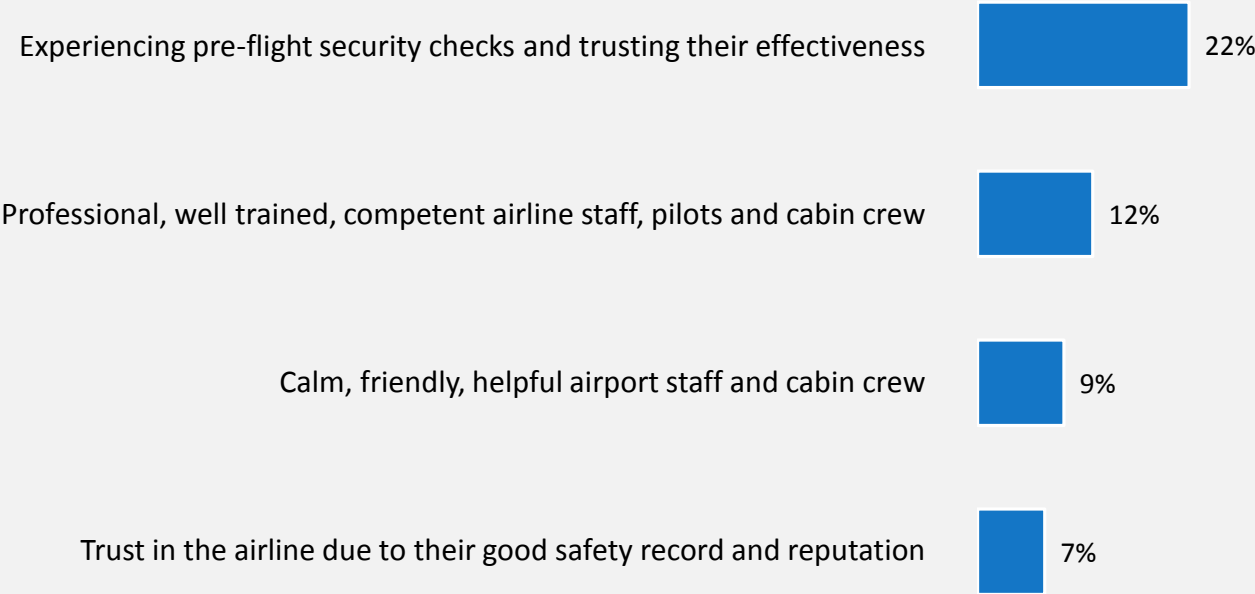
Total extremely / very safe and secure

	2011	2012	2014	2017	2019
All NZ resident travellers	72%	75%	75%	76%	77%
International flight	75%	79%	77%	79%	79%
Domestic flight	71%	70%	75%	73%	76%
Domestic flight with metal detector/carry on luggage scanning	73%	75%	78%	81%	83%
Domestic flight with no metal detector/carry on luggage scanning	68%	60%	69%	63%	64%

Bases: All NZ resident travellers (2011 n=1,036; 2012 n=1,052; 2014 n=1,229; 2017 n=1,000; 2019 n=1,042), International flight (2011 n=433; 2012 n=464; 2014 n=580; 2017 n=428; 2019 n=461), Domestic flight (2011 n=589; 2012 n=568; 2014 n=627; 2017 n=560; 2019 n=551), Domestic flight with metal detector/carry on luggage scanning (2011 n=394; 2012 n=356; 2014 n=415; 2017 n=335; 2019 n=346), Domestic flight with no metal detector/carry on luggage scanning (2011 n=177; 2012 n=196; 2014 n=191; 2017 n=198; 2019 n=184)

Undergoing pre-flight security screening and having trust in its effectiveness are still the main reasons why New Zealand travellers feel highly safe and secure on their most recent flight. Examples of the top four reasons are shown on the following two pages.

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



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



*Bags [were] scanned, people had their bodies scanned, I had to show security my scissors (they were okay), laptops [were] scanned, people had to take off jackets, jumpers, hats, sunglasses etc. I think they are very cautious. **(Very safe and secure)***

*Although it felt quite stringent, we felt the cautiousness was for our safety, and were relaxed with the process. **(Extremely safe and secure)***

*Because of the integrity of the staff. Let me describe a small incident. A lady at Queenstown airport, part of the staff wanted to enter the secure area but couldn't be bothered waiting with the passengers so jumped the queue. The boss person stopped her and said despite having what seemed to be the correct credentials she was made to go through check in and screening just like us. That's [the] integrity of the system that applies to all. **(Extremely safe and secure)***

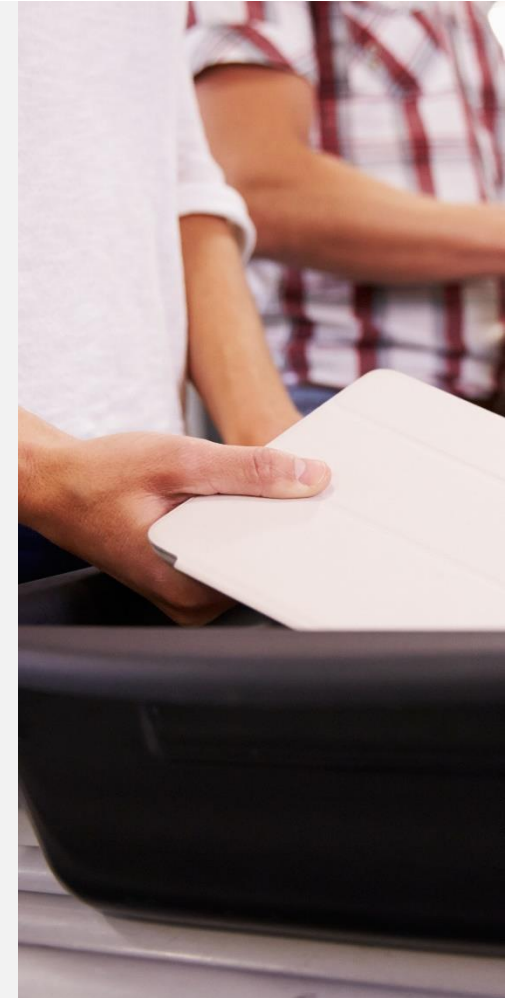
*Checks seemed diligent and thorough, could see some items being scanned multiple times if the officer was unsure. **(Very safe and secure)***

*I felt that security had done their job. And whilst it's a necessary evil, New Zealand security staff are way friendlier than TSA that I had to deal with at the other end of my flight. **(Very safe and secure)***

*I was swabbed by security and they also picked up something in my daughter's luggage that was borderline as to being able to take on to the plane, so that made me feel that they were doing all they could to ensure my safety. **(Extremely safe and secure)***

*The collective checks from the baggage check-in stage, to the walk through security body and carry on scanning, and the in flight messaging, all provide reassurance as a passenger that there is a robust system in place that is taken seriously. **(Very safe and secure)***

*Felt safe as Avsec were way over the top when checking. We were going to a wedding with my father in law whom is 95. When he went through the metal detector they made him stand up out of the wheelchair to put the detector over him...Did we look like terrorists!! I was hand patted down on my back as well, which I didn't think they were allowed to do. So yes, did feel safe as I think if we get checked like that, no one would get through... **(Extremely safe and secure)***





Professional, well trained and competent airline staff, pilots and cabin crew

*Everyone is professional and I can trust that they do their jobs properly. Safety procedures are always run over also to make me feel even more safe and capable to do what I need [to] in case of an emergency. **(Very safe and secure)***

*...I trust that the pilots and cabin crew have been well trained to handle emergencies. **(Very safe and secure)***

*Having travelled many times before I place trust in the pilots and in the staff that I'll get there safely and that my needs will be met. **(Very safe and secure)***



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

*Nice helpful staff at check-in, flight crew and pilot [were] very friendly and made me as a passenger feel safe. **(Extremely safe and secure)***

*Staff ensured people were boarded efficiently and with a friendly manner. They were visible and approachable throughout the flight and always had a smile while responding to requests. **(Extremely safe and secure)***

*We were a little late leaving; however the staff at the check-in gate were relaxed and friendly; likewise the cabin crew... **(Very safe and secure)***



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

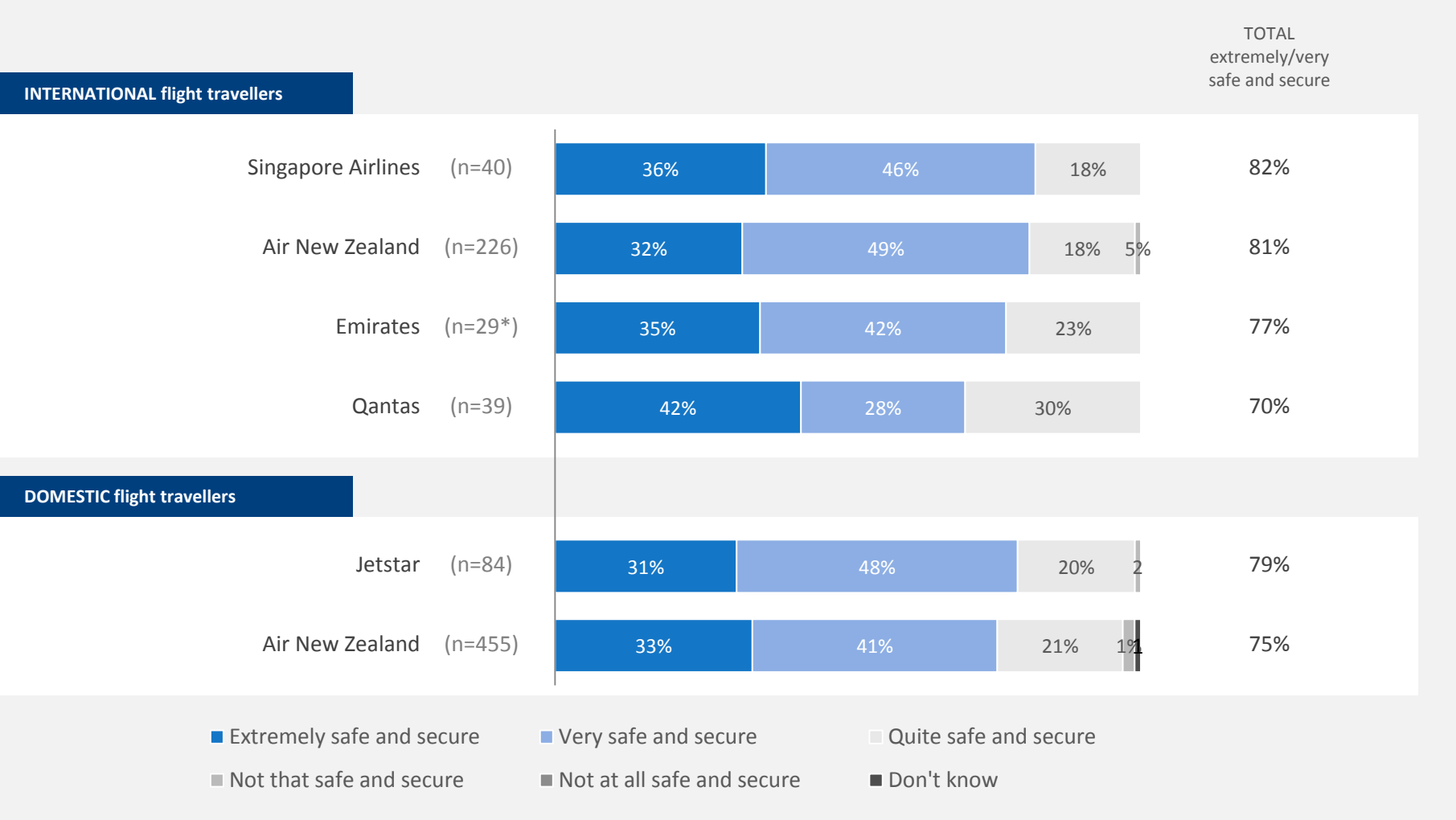
*Air New Zealand's safety and security record is impeccable and speaks for itself. **(Extremely safe and secure)***

*Emirates has an excellent safety record so I was very confident that they would do the right thing. **(Extremely safe and secure)***

*Flying with a reputable airline with a very good safety record... **(Very safe and secure)***

NZ travellers feel just as safe and secure no matter what airline they fly with, this applies to both international and domestic flights.

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



Results for all airlines across both international and domestic flights are similar to 2017.

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

Total extremely / very safe and secure

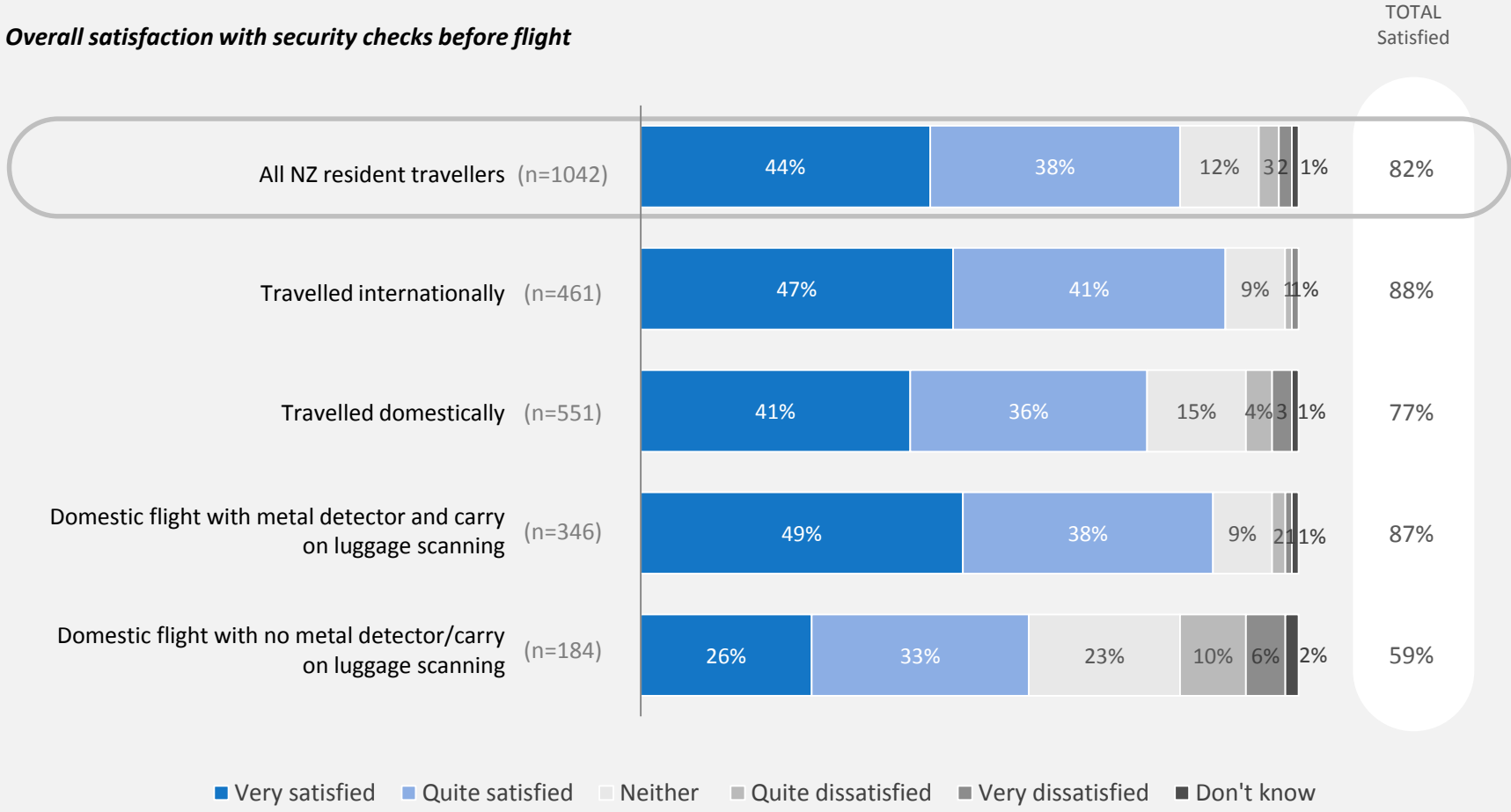
	2011	2012	2014	2017	2019
INTERNATIONAL Travellers					
Singapore Airlines	70%	76%	83%	85%	82%
Air NZ	77%	82%	73% ▼	79%	81%
Emirates*	73%	97% ▲	86%	89%	77%
Qantas	73%	76%	91% ▲	69% ▼	70%
DOMESTIC Travellers					
Jetstar	68%	73%	63%	72%	79%
Air NZ	72%	70%	79% ▲	74%	75%

Bases: International flight travellers – Emirates (2011 n=30; 2012 n=28*; 2014 n=44; 2017 n=35; 2019 n=29*), Singapore Airlines (2011 n=18*; 2012 n=22*; 2014 n=35; 2017 n=20*; 2019 n=40), Air New Zealand (2011 n=227; 2012 n=245; 2014 n=303; 2017 n=226; 2019 n=226), Qantas (2011 n=42; 2012 n=47; 2014 n=72; 2017 n=38; 2019 n=39)
 Bases: Domestic flight travellers –Air New Zealand (2011 n=472; 2012 n=447; 2014 n=485; 2017 n=441; 2019 n=455), Jetstar (2011 n=74; 2012 n=75; 2014 n=90; 2017 n=97; 2019 n=84)



Most New Zealand resident travellers feel satisfied that the security screening they went through before boarding their flight would keep them safe and secure.

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?



NZ travellers more likely to be satisfied that the pre-flight security measures would keep them safe and secure include:

Domestic flight passengers who experience personal security checks before boarding (87% vs. 59% of domestic flight passengers who are not screened before boarding)

Those who have recently noticed media coverage about New Zealand civil aviation safety and security (85% vs. 79% of those who have not)

Satisfaction with the security screening experienced before boarding has increased since 2017, but the level has only realigned to that of previous measures.

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	2019
All NZ resident travellers	81%	81%	83%	78% ▼	82% ▲
International flight	90%	90%	89%	89%	88%
Domestic flight	75%	75%	77%	71% ▼	77% ▲
Domestic flight with metal detector/carry on luggage scanning	83%	85%	86%	84%	87%
Domestic flight with no metal detector/carry on luggage scanning	57%	57%	58%	50%	59%

Bases: All resident travellers (2011 n=1,036; 2012 n=1,052, 2014 n=1,229; 2017 n=1,000; 2019 n=1,042), International flight (2011 n=433; 2012 n=464, 2014 n=580; 2017 n=428; 2019 n=461), All domestic flights (2011 n=589; 2012 n=568; 2014 n=627; 2017 n=560; 2019 n=551), Domestic flight with metal detector and carry on luggage scanning (2011 n=394; 2012 n=356; 2014 n=415; 2017 n=335; 2019 n=346), Domestic flight with no metal detector/carry on luggage scanning (2011 n=174; 2012 n=196; 2014 n=191; 2017 n=198; 2019 n=184)

The few people who are dissatisfied with security screening suggest two main improvements. Carry out visible pre-flight security checks on all domestic flights, and also reassure passengers that the requirement for additional checks is not discriminatory.

” Conduct visible pre-flight security checks on all domestic flights

*I was flying from Queenstown to Christchurch after the Christchurch mosque massacre and we did not pass through any type of security prior to boarding the plane! I am a tour director and I had 12 passengers with me from America and they were astounded and didn't feel very safe. There were armed Police on the ground, but our luggage was not scanned and we did not pass through any physical security arches. **(Very dissatisfied)***

*In New Zealand you don't personally get screened unless on a plane with 90ish seats or more. Most smaller ports don't screen passengers and in today's life sadly I believe everyone should be screened. **(Very dissatisfied)***

*Well, I was satisfied that there wasn't strict security because it's less of a hassle. But, it does make you think how slack the security on local flights are. **(Quite dissatisfied)***

*No security screening for regional domestic flights. This was quite soon after the Christchurch events and I feel like this should've been a step taken. Procedures need to be put in place for this now. **(Quite dissatisfied)***

*I think even domestic flights need some kind of screening of baggage... are terrorists and nutters not flying regionally?? **(Quite dissatisfied)***

*At Hamilton airport, there were no security checks at all. Made you feel a bit unsafe. **(Very dissatisfied)***

” Address the perception that some passengers are being singled out for further checks

*I have found them racially discriminating and pulling out non European looking people. **(Quite dissatisfied)***

*I was stopped for no apparent reason, I am 69 years old, white. The man was very rude and I ended up having my bags checked (of course nothing found) half an hour wasted when all you want to do is get home after flying for several hours. **(Very dissatisfied)***

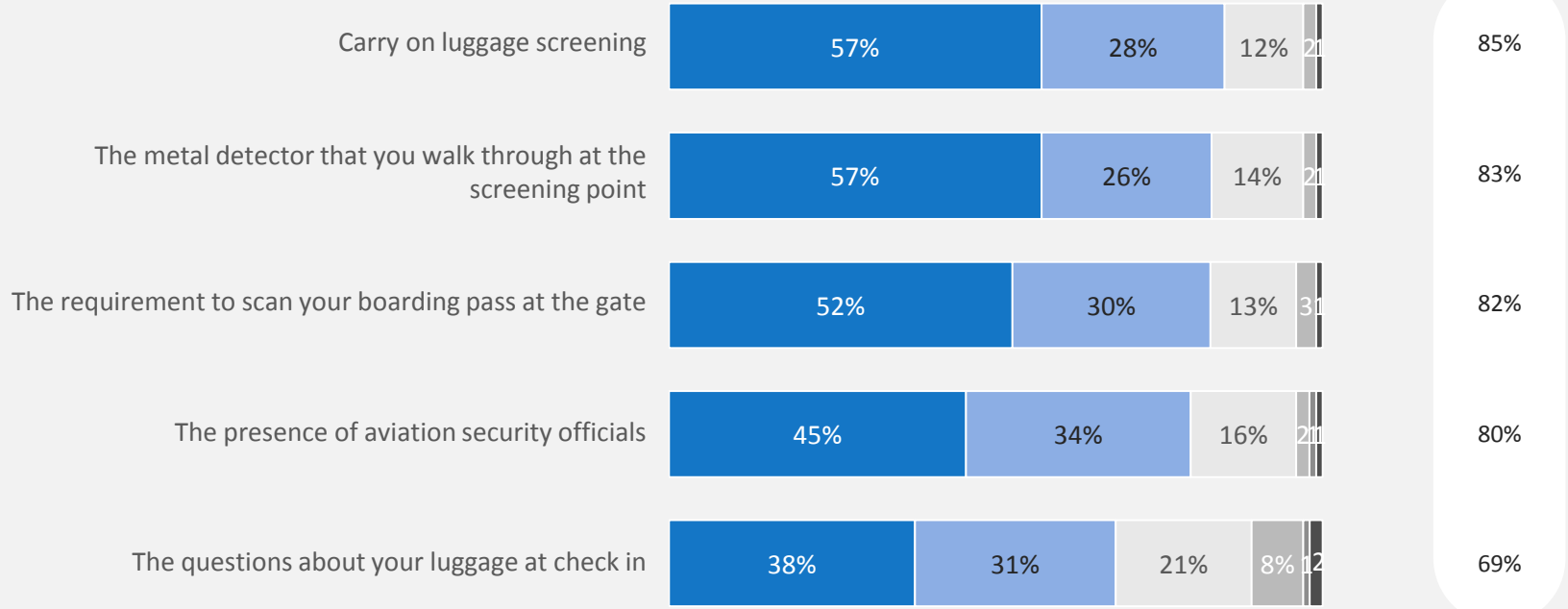
*Use common sense in articles of clothing that set off the security alert. I am sick of being treated like a criminal, e.g. being the only passenger sent back to remove shoes and put them through again when they know that was what triggered the alarm. Some of our systems are obviously set too high. For instance, when leaving Australia in the same footwear, they were completely alright. **(Quite dissatisfied)***

The majority of NZ resident travellers think all of the security procedures are highly important for keeping passengers safe while flying. Physical screening of people and their luggage is considered more important than questions or the presence of security officials.

Q9a. 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

TOTAL extremely/very important



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

Women are more likely than men to feel each security measure is 'extremely' or 'very' important.

Older travellers aged 55+ years are more likely than other age groups to consider the questions about luggage at check in, the walk through metal detectors and the presence of aviation officials to be highly important.

NZ travellers who've recently noticed media coverage on New Zealand civil aviation safety and security are more likely than those who haven't to believe it's highly important for there to be questions about luggage at check in, walk through metal detectors and have boarding passes scanned at the gate.

Perceived importance of each security procedure is consistent with 2017.

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	2019
Carry on luggage screening	89%	89%	89%	86% ▼	85%
The metal detector that you walk through at the screening point	86%	86%	86%	84%	83%
The requirement to scan your boarding pass at the gate	78%	80%	82%	81%	82%
The presence of aviation security officials	78%	78%	79%	79%	80%
The questions about your luggage at check in	62%	67% ▲	64%	66%	69%

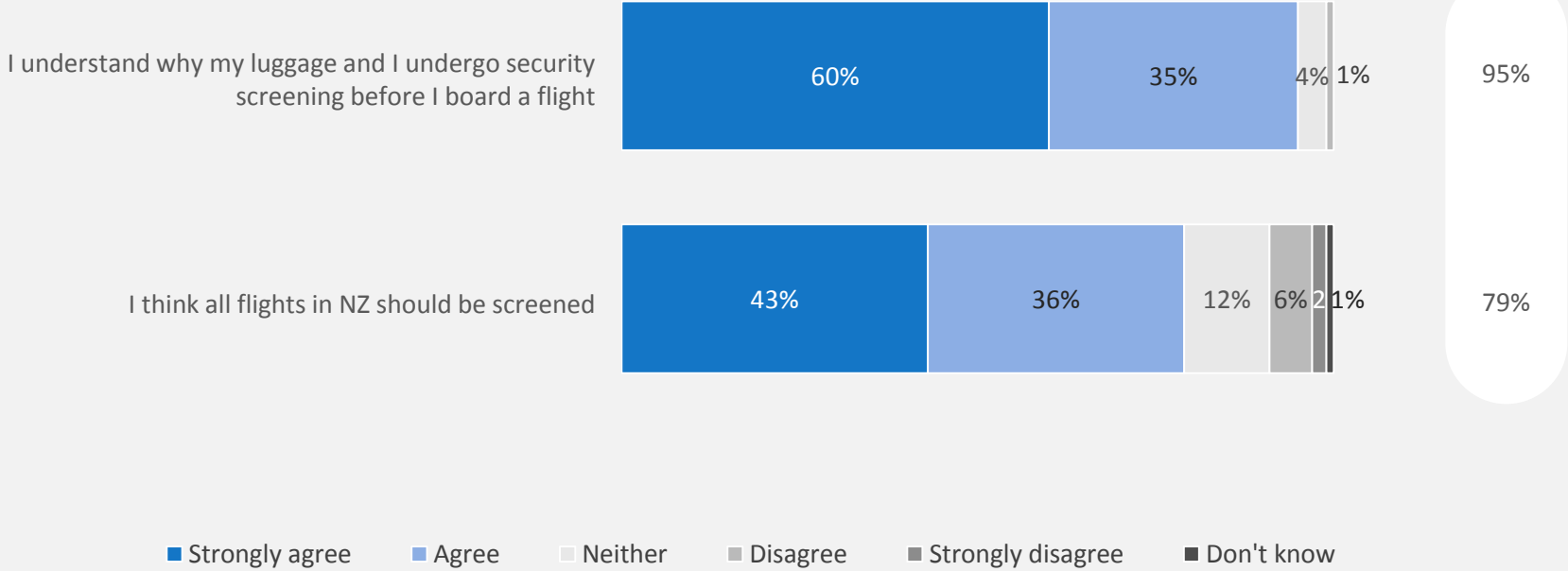
Base: All NZ resident travellers (2011 n=1,036; 2012 n=1,052; 2014 n=1,229; 2017 n=1,000; 2019 n=1,042)

Virtually all New Zealand resident travellers understand why personal security screening occurs before they board a flight. Almost eight in ten believe that 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



Men are less likely than women to understand why they and their luggage undergo security screening before a flight.

Younger travellers aged 18 to 24 years are also less likely than other age groups to comprehend why this is done.

Frequent travellers who have flown seven or more times in the last year are less likely to understand why the screening takes place than those who have flown less often during the year.

Women are more likely than men to think all flights in New Zealand should be screened.

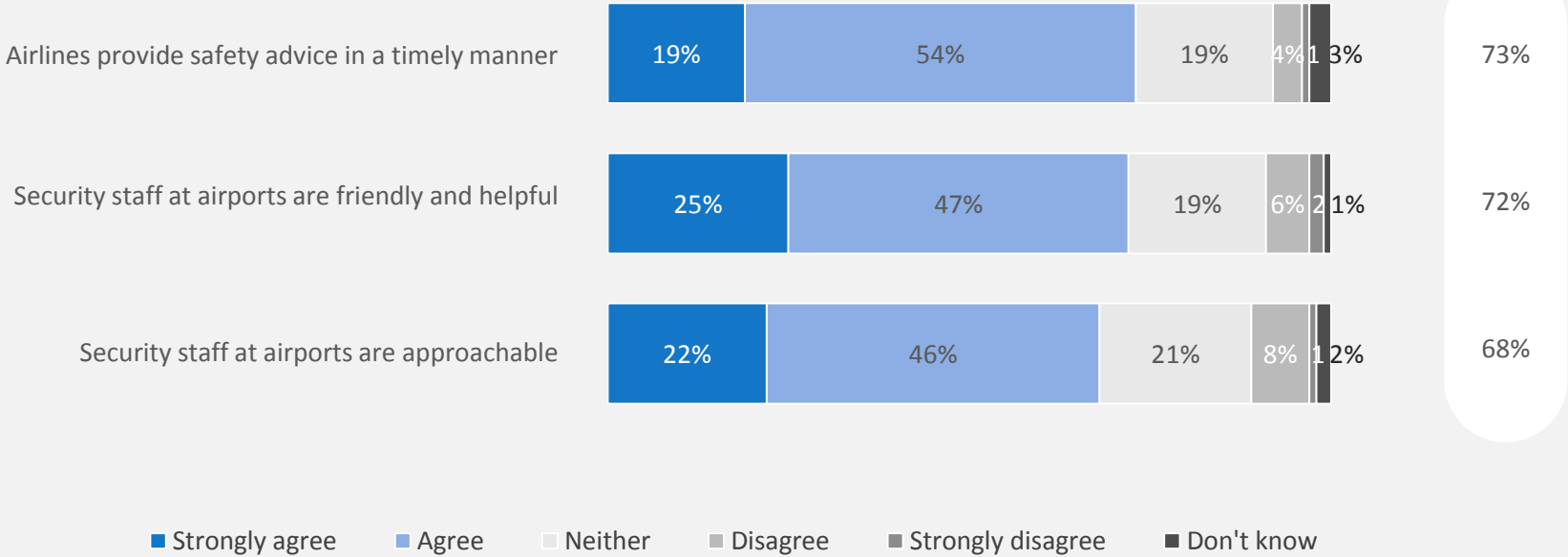
Frequent flyers are less likely to hold this view than those who fly infrequently.

Around seven in ten NZ resident travellers think that airlines provide safety advice in a timely manner, and that security staff at airports are friendly, helpful and approachable.

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

Perceptions of security staff and airline safety advice

TOTAL agreement



Women are more likely than men to think that airlines provide safety advice in a timely manner and that security staff at airports are friendly and helpful.

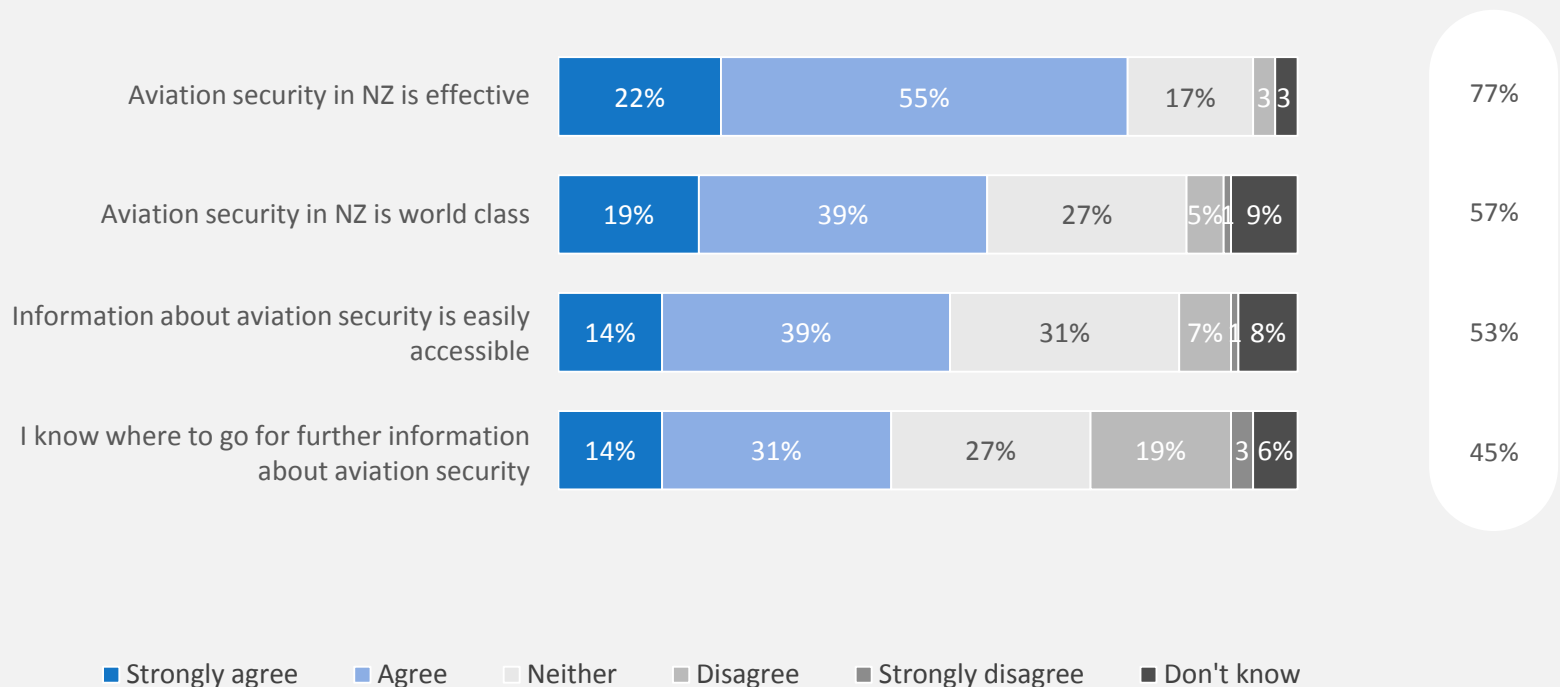
Frequent travellers who have flown seven or more times in the last year are less likely to have these views than those who have only flown one to six times in the year.

Nearly eight in ten NZ resident travellers believe aviation security in this country is effective, and six in ten think it is world class. Information about aviation security continues to be an area for improvement, only half of all travellers feel that information about aviation security is easily accessible, and less than half know where to go for further information.

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

General perceptions of aviation security in New Zealand

TOTAL agreement



Domestic flight travellers who undergo pre-flight security screening are more likely than those who don't to believe aviation security in New Zealand is effective and world class.

NZ travellers who have recently come across media coverage about New Zealand civil aviation safety and security are more likely than those who haven't to consider New Zealand aviation security to be effective and world class and to know where to go for extra information on aviation security.

Younger travellers aged 18 to 24 are more likely than other age groups to feel that information about aviation security is easily accessible.

These results are similar to 2017, but the desire for all flights in New Zealand to be screened, and the view that information about aviation security is easily accessible have risen slightly since then, and remain significantly higher than in 2011.

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

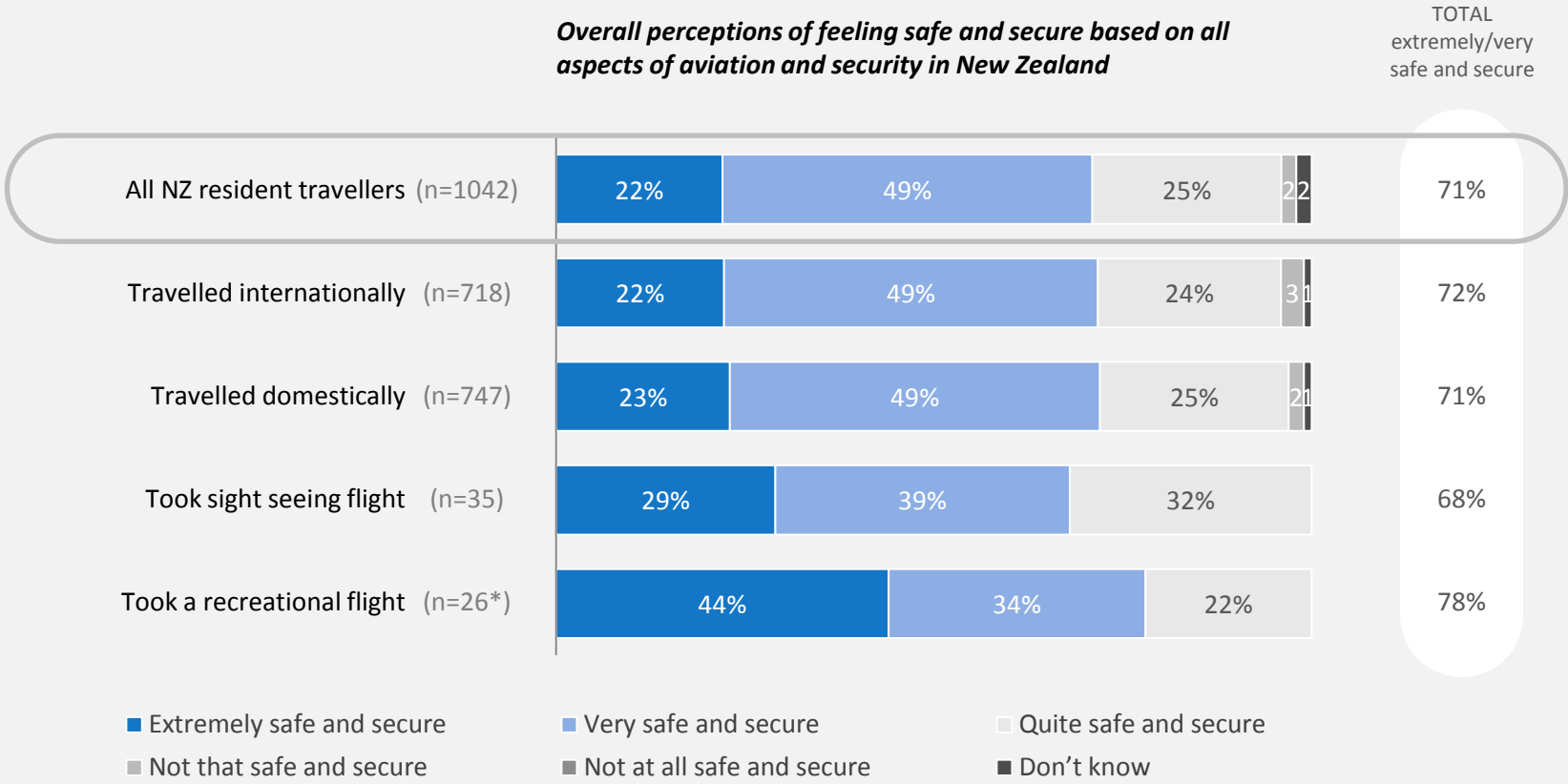
Total agreement

	2011	2012	2014	2017	2019
I understand why my luggage and I undergo security screening before I board a flight	96%	98% ▲	97%	96%	95%
I think all flights in NZ should be screened	71%	73%	70%	77% ▲	79%
Airlines provide safety advice in a timely manner	70%	71%	73%	74%	73%
Security staff at airports are friendly and helpful	72%	72%	69%	72%	72%
Security staff at airports are approachable	66%	65%	66%	65%	68%
Aviation security in New Zealand is effective	77%	76%	78%	77%	77%
Aviation security in New Zealand is world class	52%	53%	57%	58%	57%
Information about aviation security is easily accessible	44%	42%	46%	51% ▲	53%
I know where to go for further information about aviation security	33%	37% ▲	39%	45% ▲	45%

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

When NZ resident travellers consider all types of flying they have done including recreational or adventure flights their feeling of safety and security while flying is lower than when asked about their most recent flight which tended to be with 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 aviation safety and security in New Zealand into account and all kinds of flying they have done, seven in ten NZ resident travellers feel 'extremely' or 'very' safe and secure when they fly. Whereas nearly eight in ten felt this way on their most recent flight.

This suggests the other forms of flying are perceived to add an element of risk.

While passengers of the different types of flights shown in the chart feel equally safe and secure, results for recreational flights (and possibly sight seeing ones) should be viewed as indicative only due to the small base size.

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

NZ resident travellers' feeling of safety and security when considering all types of flying they have participated in is similar to 2017, but has increased significantly since 2011.

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	2019
All NZ resident travellers	67%	67%	66%	69%	71%
Travelled internationally	67%	68%	65%	70% ▲	72%
Travelled domestically	67%	65%	66%	69%	71%
Took a sight-seeing flight	74%	69%	58%	73%	68%
Took a recreational flight*	53%	48%	65%	65%	78%

Bases: All NZ resident travellers (2011 n=1,036; 2012 n=1,052; 2014 n=1,229; 2017 n=1,000; 2019 n=1,042), travelled internationally (2011 n=704; 2012 n=710, 2014 n=868; 2017 n=678; 2019 n=718), domestically (2011 n=833; 2012 n=765; 2014 n=920; 2017 n=748; 2019 n=747), taken a sight seeing flight (2011 n=24*; 2012 n=39; 2014 n=41; 2017 n=14*; 2019 n=35), recreational flight (2011 n=33; 2012 n=18*; 2014 n=33; 2017 n=17*; 2019 n=26*)

* 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

- 13% of NZ resident travellers have sky dived in New Zealand, consistent with 2017 (11%).
- Three quarters of sky divers (75%) think the activity involves some degree of risk, a higher proportion than in 2017 (61%) but in line with previous years. Those who have never been sky diving in New Zealand are more likely than sky divers to consider it a risky activity (89%), similar to 2017 (87%).
- 7 in 10 sky divers feel safe and secure when flying or undertaking aviation activities in New Zealand, a similar proportion to 2017 (75%).

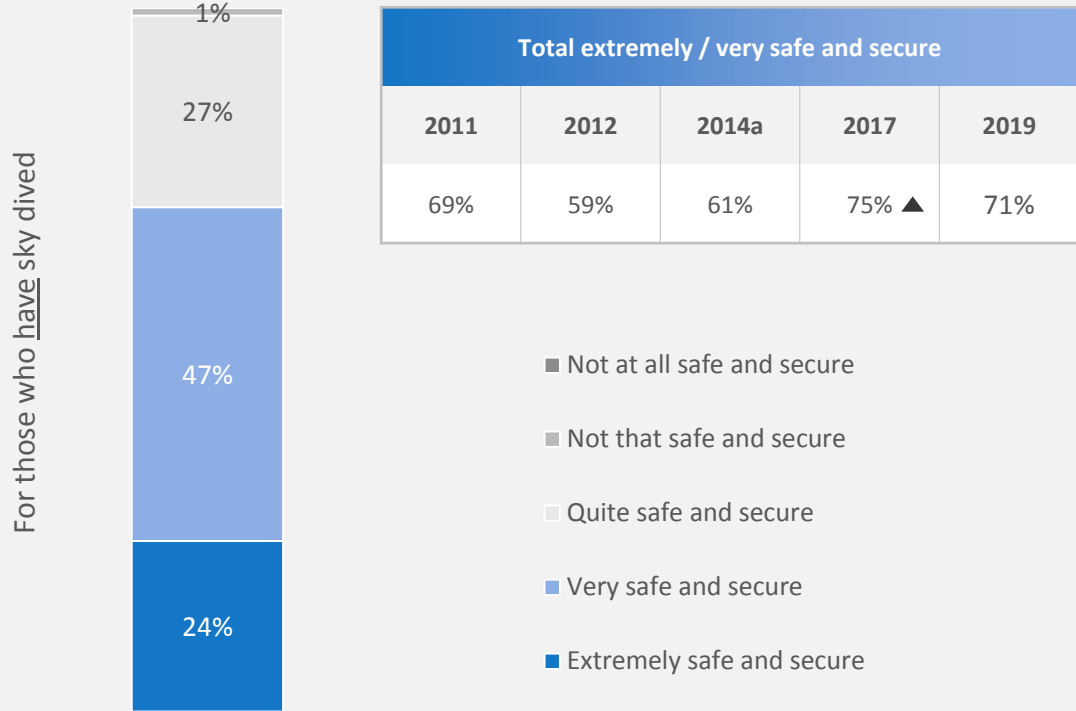
Q13. Please indicate how risky you think each of these activities is to the personal safety of the people that undertake them

PERCEIVED RISK OF SKY DIVING	Have not sky dived (n=859)					Have sky dived (n=133)				
	2011	2012	2014	2017	2019	2011	2012	2014	2017	2019
Extremely / very risky										
Quite risky										
Not that / not at all risky										
Total extremely / very / quite risky	87%	86%	88%	87%	89%	75%	64%	73%	61%	75%

Bases: Resident travellers who have not sky dived (2011 n=924; 2012 n=936; 2014 n=1,066; 2017 n=849; 2019 n=859), Resident travellers who have sky dived (2011 n=94; 2012 n=90; 2014 n=137; 2017 n=109; 2019 n=133). Don't know responses excluded

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



Perceptions of recreational flying



KEY RESULTS

- 15% of NZ resident travellers have done recreational flying in New Zealand (e.g. in a microlight or an old aeroplane like a Tiger Moth), similar to 2017 (13%).
- Over half (56%) of those who have flown recreationally believe there is some level of risk involved. People who have never experienced a recreational flight are more likely to associate the activity with risk (76%).
- 7 in 10 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.

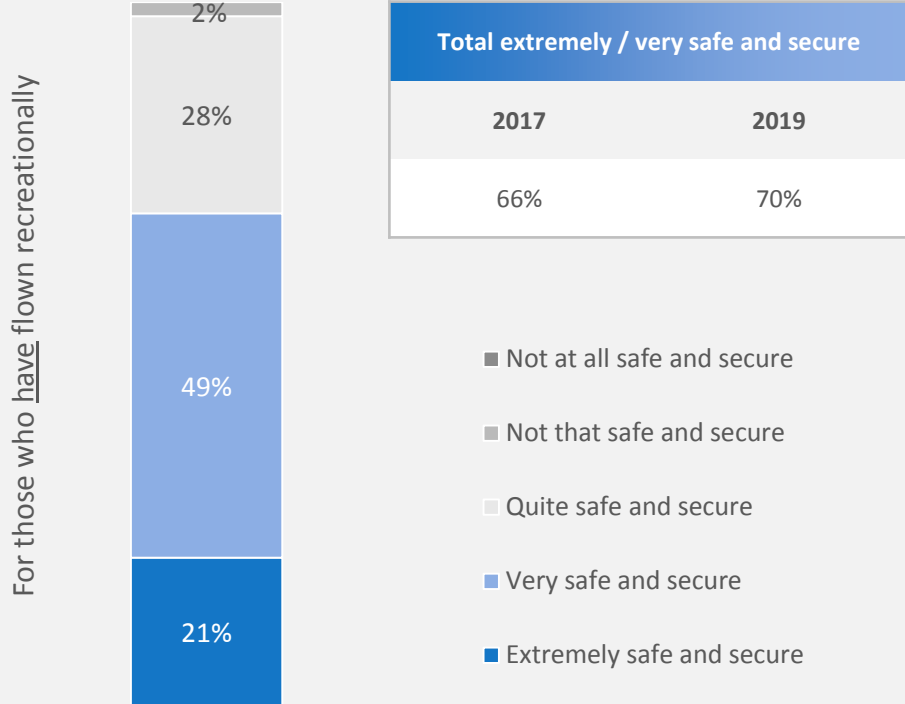
Q13. Please indicate how risky you think each of these activities is to the personal safety of the people that undertake them

PERCEIVED RISK OF RECREATIONAL FLYING	Have not flown recreationally (n=818)		Have flown recreationally (n=153)	
	2017	2019	2017	2019
Extremely / very risky		38%	9%	
Quite risky		38%	46%	
Not that / not at all risky		24%	44%	
Total extremely / very / quite risky	72%	76%	49%	56%

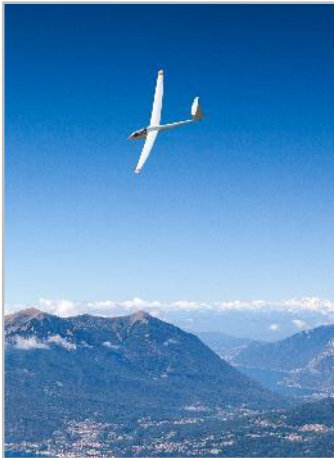
Bases: Resident travellers who have not flown recreationally (2017 n=824; 2019 n=818), Resident travellers who have flown recreationally (2017 n=130; 2019 n=153). Don't know responses excluded

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

- 8% of NZ resident travellers have been gliding in New Zealand.
- Almost half (49%) of those who have gone gliding associate the activity with risk. Those who have not participated in gliding in New Zealand are more likely to think the activity involves risk (75%).
- 7 in 10 (71%) 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.
- These results are consistent with 2017.

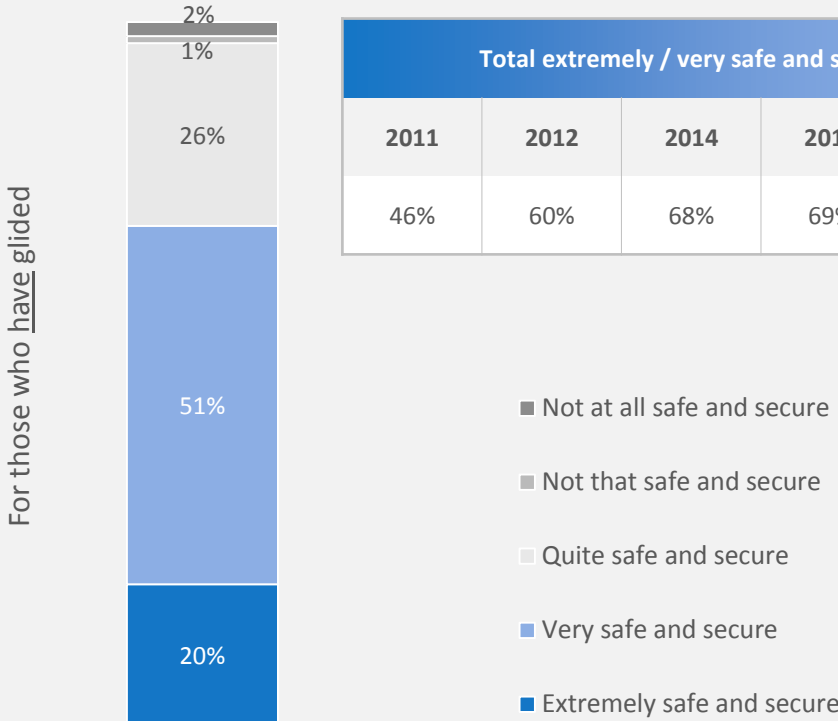
Q13. Please indicate how risky you think each of these activities is to the personal safety of the people that undertake them

PERCEIVED RISK OF GLIDING	Have not glided (n=880)					Have glided (n=86)				
	2011	2012	2014	2017	2019	2011	2012	2014	2017	2019
Extremely / very risky										
Quite risky										
Not that / not at all risky										
Total extremely / very / quite risky	71%	69%	70%	70%	75%	30%	36%	46%	41%	49%

Bases: Resident travellers who have not glided (2011 n=939; 2012 n=927; 2014 n=1,082; 2017 n=883; 2019 n=880), Resident travellers who have glided (2011 n=71; 2012 n=88; 2014 n=102; 2017 n=69; 2019 n=86). Don't know responses are excluded

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



Perceptions of flying in a helicopter



KEY RESULTS

- 38% of NZ resident travellers have flown in a helicopter in New Zealand, similar to 2017 (37%).
- 4 in 10 (44%) of those who have been on a helicopter flight in New Zealand feel there is risk involved in the activity. Those who have not taken a helicopter flight in New Zealand are more likely to believe there is risk involved (55%).
- Almost 7 in 10 (69%) 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, similar to 2017 (66%).
- Note that flying in a helicopter was included as a category for the first time in 2017.

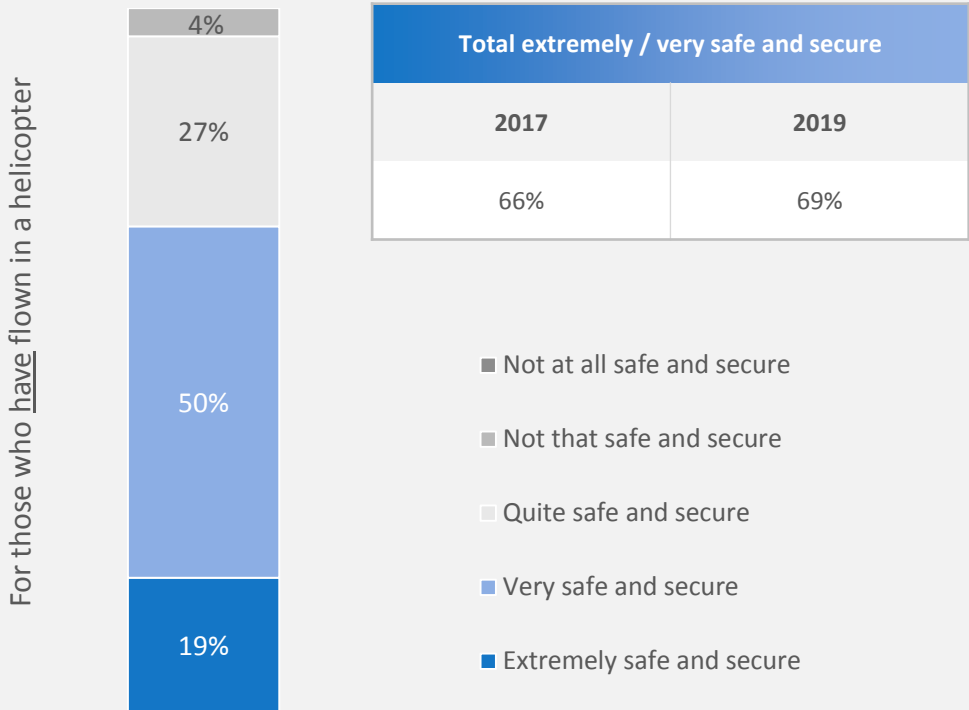
Q13. Please indicate how risky you think each of these activities is to the personal safety of the people that undertake them

PERCEIVED RISK OF FLYING IN A HELICOPTER	Have not flown in a helicopter (n=597)		Have flown in a helicopter (n=403)	
	2017	2019	2017	2019
Extremely / very risky		21%	13%	
Quite risky		34%	31%	
Not that / not at all risky		45%	56%	
Total extremely / very / quite risky	54%	55%	43%	44%

Bases: Resident travellers who have not flown in a helicopter (2017 n=596; 2019 n=597), Resident travellers who have flown in a helicopter (2017 n=376; 2019 n=403). Don't know responses excluded

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

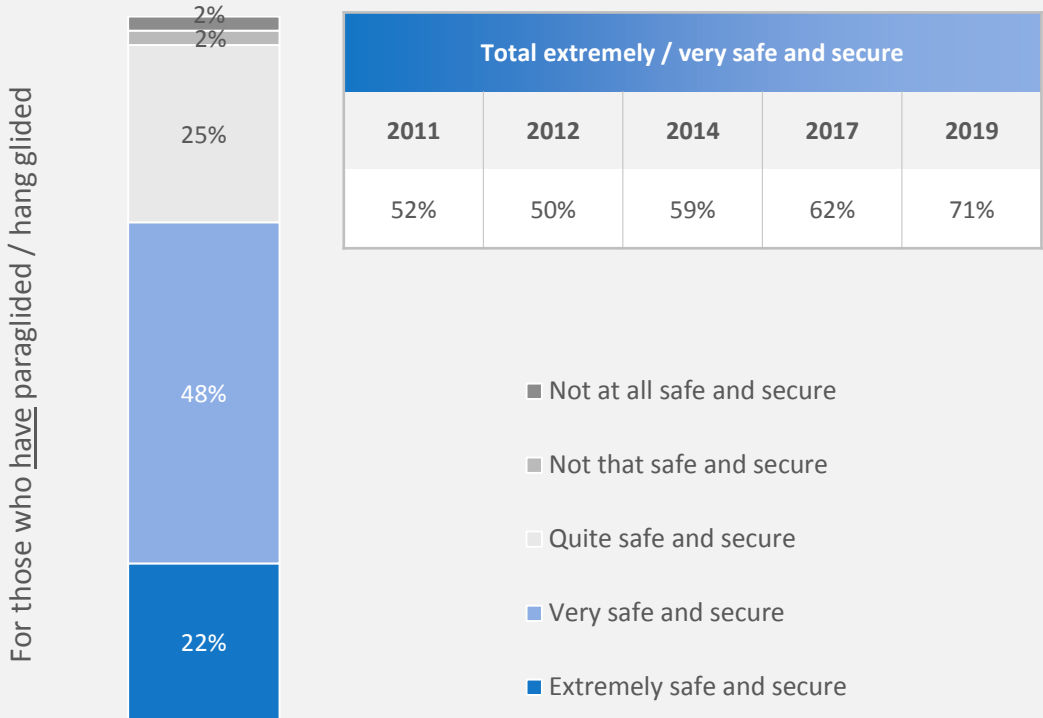
- 8% of NZ resident travellers have done paragliding or hang gliding in New Zealand.
- Nearly three quarters (74%) of those who have experienced paragliding or hang gliding in New Zealand believe these activities are risky to some extent. People who have not been paragliding or hang gliding in New Zealand are more likely to associate these activities with risk (91%).
- 7 in 10 (71%) of those who have been paragliding or hang gliding in New Zealand feel 'extremely' or 'very' safe and secure about flying or participating in aviation activities.
- All results align with 2017.

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=900)					Have paraglided / hang glided (n=78)				
	2011	2012	2014	2017	2019	2011	2012	2014	2017	2019
Extremely / very risky										
Quite risky										
Not that / not at all risky										
Total extremely / very / quite risky	89%	89%	89%	88%	91%	75%	68%	75%	76%	74%

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



Bases: Resident travellers who have not paraglided/hang glided (2011 n=968; 2012 n=982; 2014 n=1,133; 2017 n=899; 2019 n=900), Resident travellers who have paraglided/hang glided (2011 n=48; 2012 n=36; 2014 n=53; 2017 n=58; 2019 n=78). Don't know responses excluded

Perceptions of drones, or unmanned aerial vehicles



KEY RESULTS

- 7% of NZ resident travellers say they have operated a remotely piloted aircraft system (drone) in New Zealand.
- 86% of NZ resident travellers think that drones or unmanned aerial vehicles are a risk to aviation safety generally, a higher proportion than in 2017 (79%). Drone users are significantly less likely to think drones pose a risk (68%) than those who have never operated a drone (88%).
- Safety and privacy invasion are still the main concerns NZ resident travellers have about drones. Some travellers suggest stricter rules, more enforcement, and higher penalties are needed to discourage dangerous and socially unacceptable drone use. Registration and more training for drone users is also suggested. These comments are primarily directed at recreational as opposed to commercial users, as some recognise the value of professional drone use.



Drones threaten air travellers' safety and security

I think that the majority of people don't appreciate the significance of drones or the security risk that they pose which really concerns me. I think people have a fairly lax approach to the use of them and think they're a 'fun toy'. (Extremely risky)

If a bird can do damage to an aeroplane, what damage could a drone do? (Very risky)

Our country is a low flying zone for most of the domestic and recreational flights. These drones will surely create a serious accident one day. There must be restrictions on selling drones with the capacity of how high they can fly. The high flying drones should not be allowed unless other wise given a special permission. (Extremely risky)

Some fly in planes' airspace, my daughter's plane was delayed because of a drone. (Extremely risky)

The one thing I worry about when flying is the plane I am in colliding either with another plane or a drone... (Extremely risky)



Drones can invade privacy

I am absolutely against them being available for private use. They are invasive and an invasion of personal privacy. I don't want one flying over my house taking photos or on a beach taking movies or photos of people without permission. (Extremely risky)

I feel they might become an invasion of people's privacy if they are fitted with cameras. (Very risky)

...I no longer feel private in my own back yard as I have spotted a few drones over my property and they can be used by idiots to perv or case out a house to burgle and you can't report them as you don't know where they are coming from...I am against them!!! (Very risky)

We have had one flying low around our neighbourhood recently looking into people's backyards and houses. It upset many residents.... (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	All NZ resident travellers (n=1,018)		Have not* operated a drone (n=923)	Have operated a drone (n=72)
	2017	2019	2019	2019
Extremely / very risky	60%	60%	62%	36%
Quite risky	27%	27%	26%	32%
Not that / not at all risky	14%	14%	12%	32%
Total extremely / very / quite risky	79%	86%	88%	68%

Bases: All NZ resident travellers (2017 n=964; 2019 n=1,018). Don't know responses excluded

* Drone use was included for the first time in 2019.



Stricter rules, more enforcement and tougher penalties are required

Drones can play an important part in a myriad of ways in the security and ongoing development of NZ, BUT there needs to be more onus placed on the owners to make sure the drones are used in a responsible and appropriate manner. (Very risky)

I feel like the use of drones in a personal capacity needs to be more closely and strictly monitored. I feel owners/users of drones need to be accountable through training and rules. (Extremely risky)

I think drones are a very valuable tool for many disciplines including recreation, however we should keep laws around flying them in [or] over private property, around airports, and in commercial airspace. (Very risky)

I think the sale needs to be regulated, and their operation needs to be regulated, and enforced. I think the use of drones needs to be much more strictly controlled, from [an] aviation security point of view, but also because of privacy breach concerns, plus how they interfere with the public's enjoyment of parks and beaches because they are intrusive and noisy. (Very risky)

If being used near an airport or a highly-populated area for no real purpose...perhaps invading other's privacy, there should be a significant fine...It seems all too carefree on the part of authorities. (Extremely risky)

It's long past time for severe penalties for people who operate them in a risky manner. (Extremely risky)

People who use drones around airports (other than police etc) should be heavily fined or imprisoned because they are putting many other lives in danger. (Very risky)



Compulsory registration and/or training is needed for drone users

Drones need to be registered in the same way as guns, as they are potential weapons, and a lot of misuse has been reported, but owners [and] operators are not easily found. (Extremely risky)

For any drone capable of reaching aviation height levels, all drone operators should have a license and the drone should have identifying marks. (Very risky)

Having a database (registration) for drones might alleviate some of the issues of 'finding the owner' of a rogue drone flown near an airport. (Very risky)

Need to be sure the aviation rules and regulations are available to those buying drones. Maybe also mandatory training before the purchase. (Very risky)

They should be registered. How else can you make sure that criminals, i.e. burglars, child sex offenders aren't using them for no good? (Extremely risky)



Comments from those who don't believe drones pose a risk

I think the "safety concerns" are primarily media hype and I'm tired of hearing them. (Not at all risky)

Seems like a lot of fuss over not much. Also comes across as old technology trying to preserve its spot rather than working with new technology. (Not that risky)

The momentum of a drone hitting a major plane is about the same as a large seagull and like those accidents they really only become a problem when they go into the engine and the likelihood of that is not exactly high. (Not that risky)

They are safe, it is the people that use them that can make it dangerous. (Not that risky)

As long as they are flown in open public areas and away from air traffic areas they should not need to be monitored. (Not that risky)

As long as they are not near airports or higher than 500m I don't have a problem with them. (Not that risky)

There are idiots who misuse the use of drones in New Zealand i.e. around planes etc and they are ruining it for others that are sensible drone owners. I own a wedding videography business and these idiots are ruining it for all of us by giving drone users a bad name. (Not at all risky)

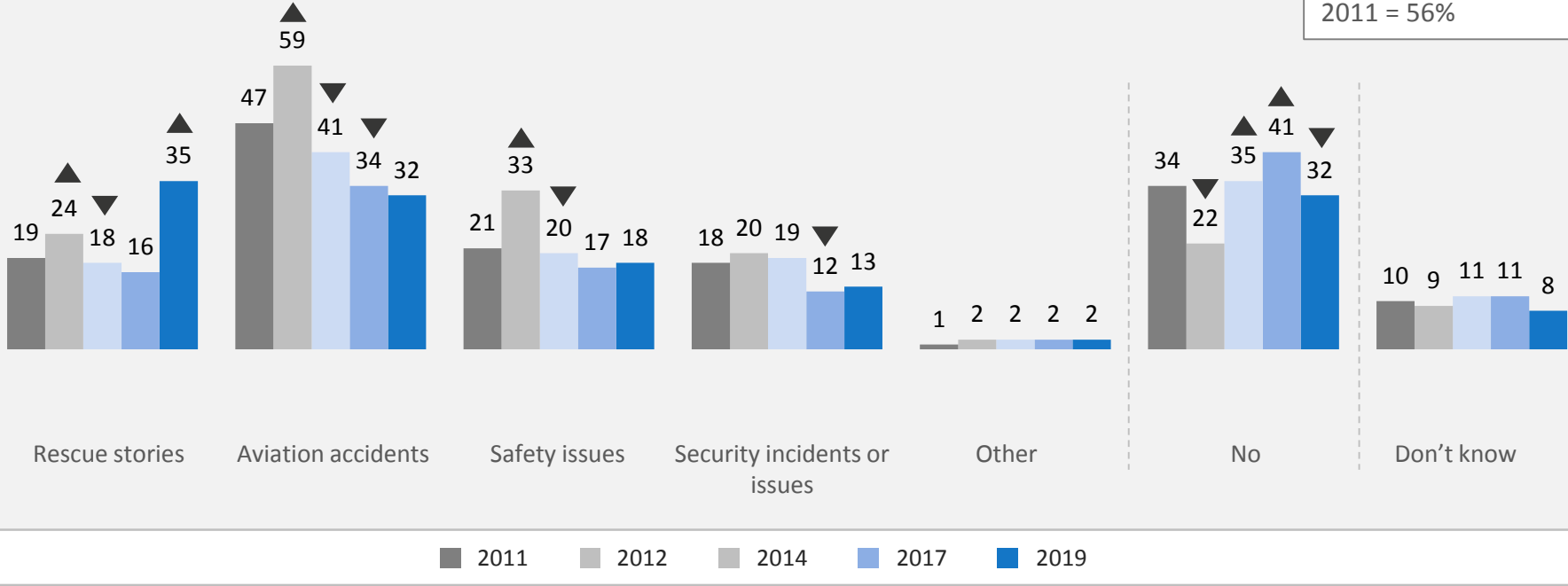
NZ resident travellers are more likely to have recently noticed media coverage about New Zealand civil aviation safety and security than in 2017. This is due mainly to increased recall of rescue stories.

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:
 2019 = 60% ▲
 2017 = 48% ▼
 2014 = 54% ▼
 2012 = 69% ▲
 2011 = 56%



Rescue stories and aviation accidents are the main things recalled overall.

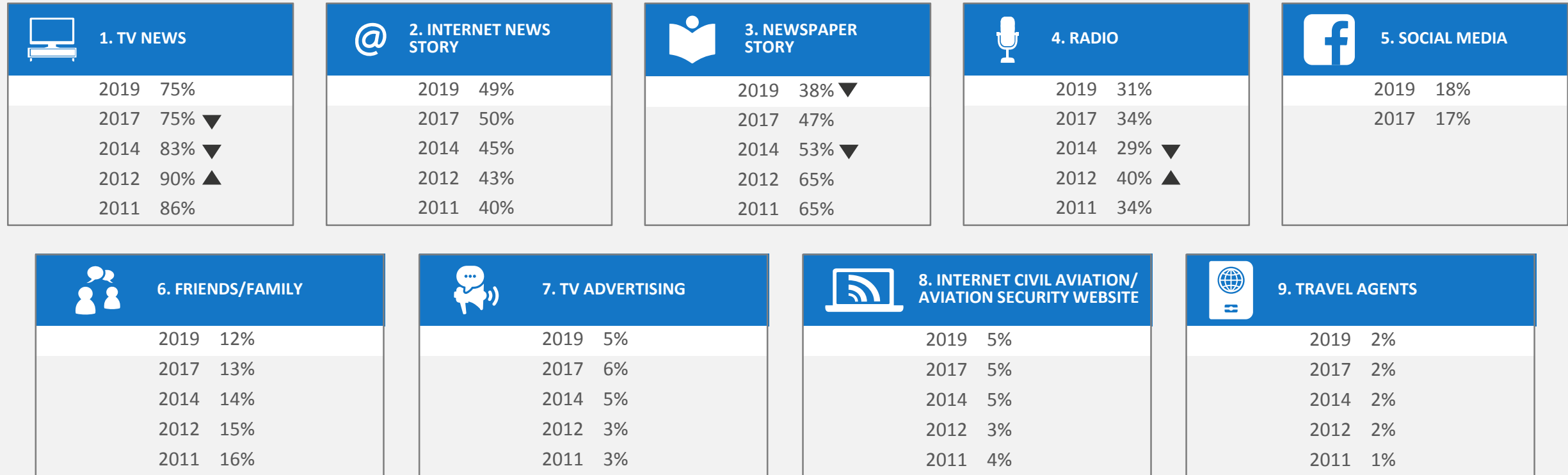
A list of related stories covered by the media before and during the interviewing period are shown on page 5 of this report.

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

Television news is still the main source of awareness of New Zealand civil aviation safety and security information. Newspaper stories are a less common source than in 2017.

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; 2019 n=631). Social media was added for the first time in 2017

Some rules for what can or cannot be packed in carry on or checked in luggage for domestic or international flights are known by less than half of NZ resident travellers (see the percentages shaded blue).

Imagine that you were about to go on [domestic flight within/ international flight from] New Zealand.
 Q24 - Which of these items are okay to take in your carry-on bag and which are not okay? Q24a – Which of these items are okay to take in your checked-in bags and which are not okay?

% of NZ resident travellers that know each rule	 Domestic flights				 International flights			
		Carry on	Checked in		Carry on	Checked in		
An apple	✓	82%	✓	75%	✓	50%	✓	45%
Bottle of water (250ml)	✓	63%	✓	71%	✗	68%	✓	52%
Butter (500g)	✓	50%	✓	65%	✗	66%	✓	35%
Can of Coke (330ml)	✓	46%	✓	56%	✗	78%	✓	39%
E-cigarette (x1)	✓	24%	✗	40%	✓	18%	✗	45%
Fireworks	✗	95%	✗	88%	✗	97%	✗	94%
Gin (750ml) in a Security Tamper Evidence bag	✓	58%	✓	68%	✗	37%*	✓	64%
Laptop (x1)	✓	94%	✓	80%	✓	94%	✓	80%
Lighter (x1)	✓	16%	✗	57%	✓	13%	✗	68%
LPG Bottle	✗	92%	✗	88%	✗	95%	✗	92%
Manuka Honey (500g)	✓	55%	✓	71%	✗	65%	✓	50%
Perfume (75ml)	✓	74%	✓	84%	✓	70%	✓	82%
Perfume (125ml)	✓	45%	✓	69%	✗	76%	✓	59%
Power Bank (x1) (a portable battery)	✓	50%	✗	34%	✓	49%	✗	40%
Power Drill	✗	79%	✓	41%	✗	87%	✓	33%
Prescription medicine	✓	93%	✓	92%	✓	92%	✓	91%
Scissors with 10cm blade	✗	92%	✓	48%	✗	93%	✓	46%
Snow Globes	✓	31%	✓	46%	✗	47%	✓	38%
Swiss Army Knife with 7cm blade	✗	87%	✓	48%	✗	90%	✓	42%
Talcum Powder (400ml)	✓	40%	✓	65%	✗	61%	✓	57%
Toothpaste (80ml)	✓	84%	✓	87%	✓	74%	✓	86%

✓
Allowed in that type of bag

✗
Not allowed in that type of bag

Particularly low awareness

Rules that are particularly important for CAA to raise awareness of include:

On domestic and international flights you cannot put an E-cigarette or a Power Bank in your checked in luggage.

- Women aged 25-34 years are most likely to think it's okay to put an E-cigarette in checked in bags for both types of flight.

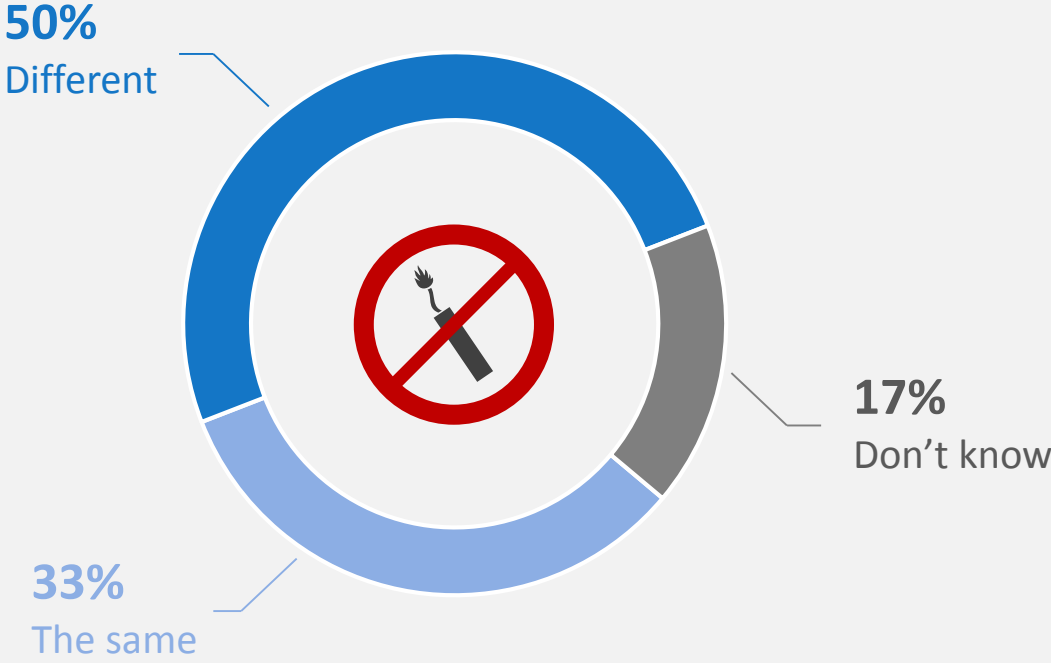
On international flights you cannot put a snow globe in your carry on bag.

- Men aged 25-34 years and women aged 45-54 years are most likely to think a snow globe is allowed in your carry on bag for an international flight.

* Some may have been thinking of alcohol bought at duty free post-security screening when answering this question.

Half of NZ resident travellers know that the rules for what can or cannot be packed in carry on and checked in luggage for domestic and international flights are different. The rest either incorrectly believe the rules are the same for both types of flight, or don't know.

Q25 - Are the New Zealand restrictions on items in luggage the same or different for domestic and international flights?



Frequent travellers who have flown seven or more times in the past year are more likely to know the rules for domestic and international flights are different than those who have flown less often during the year.

Women are more likely than men to know the rules are different.

Older travellers aged 65+ years are less likely than other age groups to know the rules are different.

Those whose most recent flight was international are less likely than those whose most recent flight was domestic to know the rules when flying from New Zealand are different than when flying within the country.

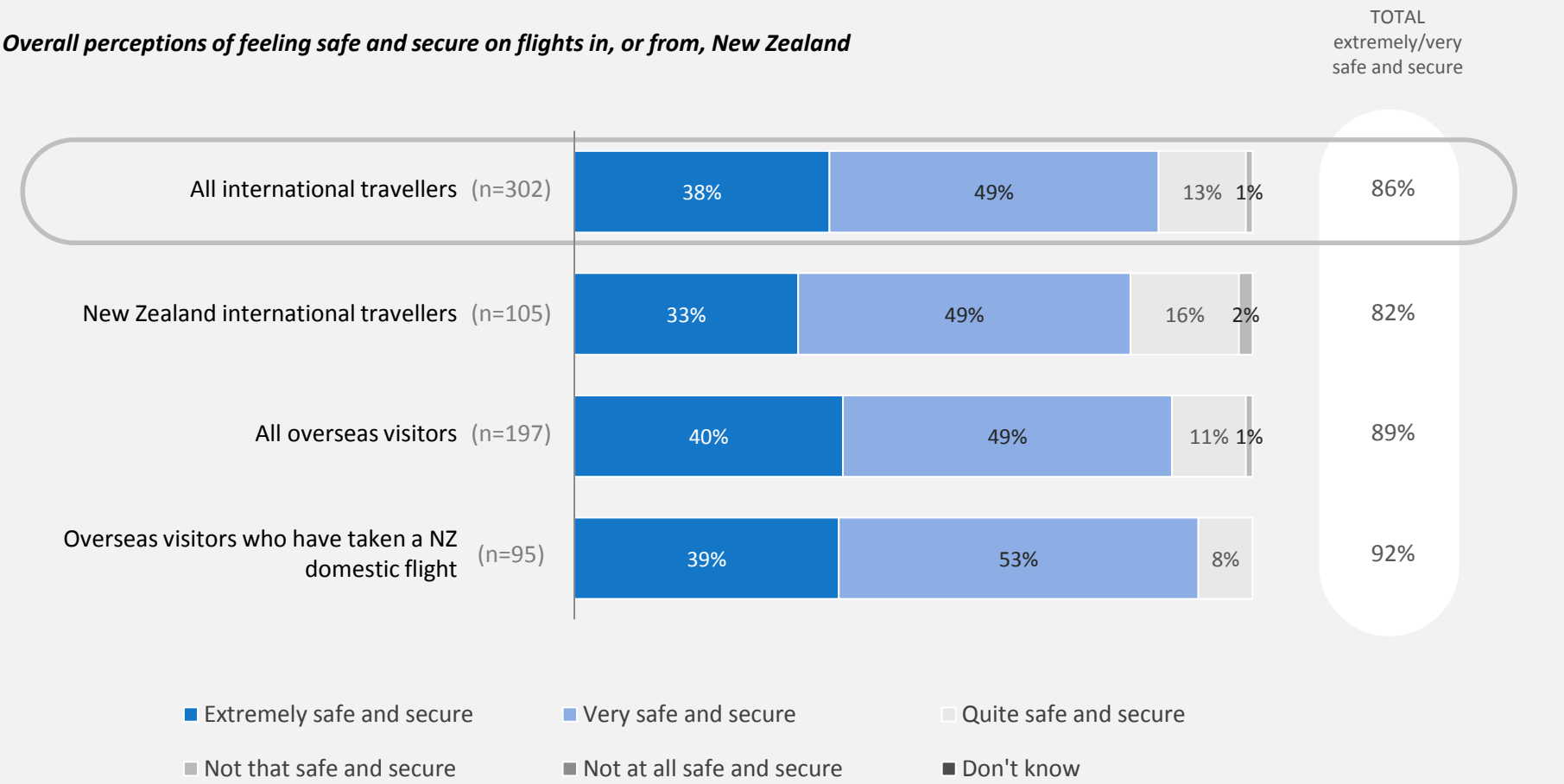


International traveller Survey results



Almost all people who travel internationally from New Zealand feel 'extremely' or 'very' safe and secure when flying within 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?



All subgroups of international travellers feel equally safe and secure while flying in or departing from New Zealand.

Just three international travellers (all from in New Zealand) indicated they felt 'not that' safe and secure. This was due to a lack of security screening on domestic flights. Their comments are displayed below.

- "Nobody checked the contents of my bag when I boarded the plane at Rotorua."* **(Not that safe and secure)**
- "I think they should ask [for] ID/Passport to travel inside New Zealand (nation flights)."* **(Not that safe and secure)**
- "Domestically not enough security checks."* **(Not that safe and secure)**

International travellers have consistently felt highly safe and secure on both domestic and international flights across all years.

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

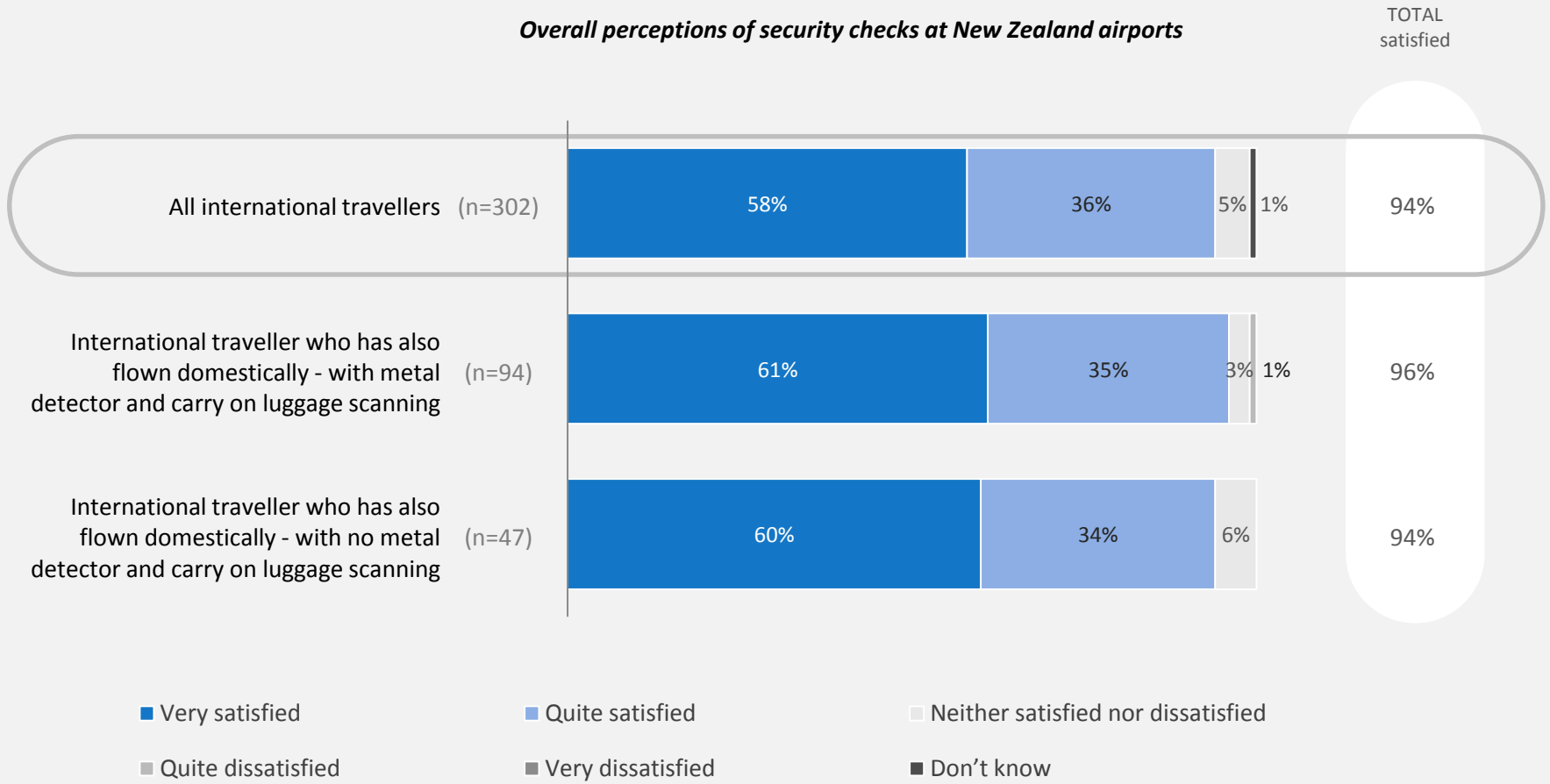
Total extremely / very safe and secure

	2011	2012	2014	2017	2019
All international travellers	83%	85%	88%	86%	86%
New Zealand international travellers	80%	83%	83%	80%	82%
All overseas visitors	86%	90%	92%	90%	89%
Overseas visitors who have taken a New Zealand domestic flight	87%	96%	93%	89%	92%

Bases: All international travellers (2011 n=310; 2012 n=325; 2014 n=327; 2017 n=329; 2019 n=302), New Zealand international travellers (2011 n=161; 2012 n=188; 2014 n=168; 2017 n=138; 2019 n=105), All overseas visitors (2011 n=149; 2012 n=137; 2014 n=159; 2017 n=190; 2019 n=197), Overseas visitors who have taken a NZ domestic flight (2011 n=47; 2012 n=54; 2014 n=44; 2017 n=70; 2019 n=95)

Nearly all international travellers are satisfied that the security procedures they undergo at New Zealand airports will keep them safe and secure throughout 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?



International travellers who also flew on domestic flights with security screening before boarding are slightly, but not significantly, more likely to be satisfied that the security checks would keep them safe and secure than those who flew on domestic flights without screening.

Only one international traveller (a New Zealand resident) was dissatisfied with the security measures they experienced. They suggest more screening is required.

“More screening and having checked in luggage screening. Individual screening similar to USA.” (Quite dissatisfied)

Over time, international travellers have remained highly satisfied with the effectiveness of the security screening they experience 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	2019
All international travellers	94%	94%	93%	95%	94%
International travellers who have also flown domestically – with metal detector and carry on luggage scanning	96%	95%	92%	98%	96%
International travellers who have also flown domestically – with no metal detector and carry on luggage scanning	84%	93%	93%	87%	94%

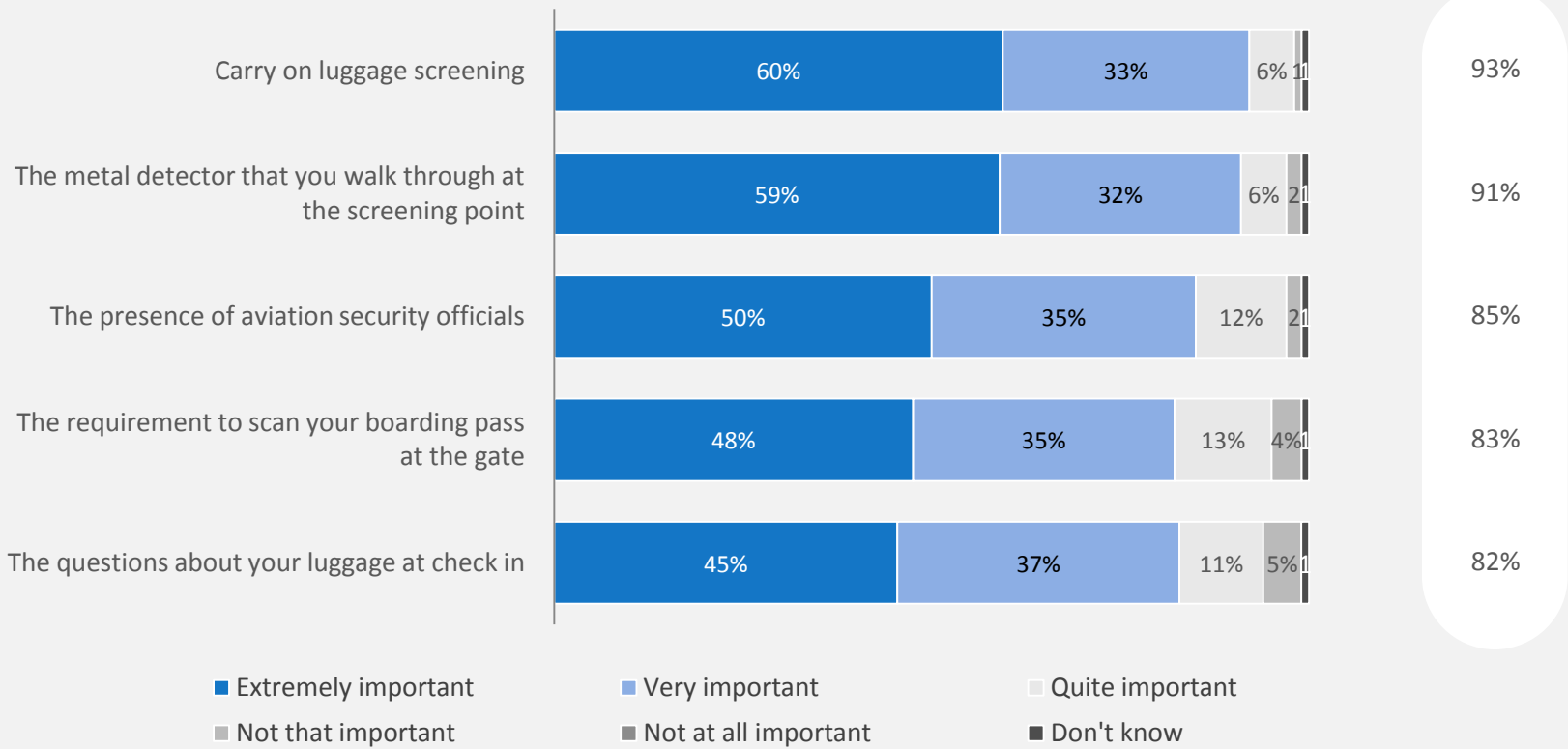
Bases: All international travellers (2011 n=310; 2012 n=325; 2014 n=327; 2017 n=329; 2019 n=302), international travellers who have also flown domestically – with metal detector and carry on luggage scanning (2011 n=103; 2012 n=115; 2014 n=86; 2017 n=100; 2019 n=94), international travellers who have also flown domestically – with no metal detector and carry on luggage scanning (2011 n=52; 2012 n=59; 2014 n=58; 2017 n=54; 2019 n=47)

All security checks are considered highly important by the vast majority of international travellers. Screening hand luggage and requiring passengers to walk through a metal detector before their flight are the most important procedures.

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

TOTAL
extremely/very
important



Women are more likely than men to think it's highly important to scan boarding passes at the departure gate.

Over the years, international travellers have continued to place a high level of importance on each security measure.

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	2019
Carry on luggage screening	92%	93%	94%	95%	93%
The metal detector that you walk through at the screening point	88%	92%	94%	91%	91%
The presence of aviation security officials	89%	83%	88%	85%	85%
The requirement to scan your boarding pass at the gate	79%	82%	86%	88%	83%
The questions about your luggage at check-in	79%	76%	79%	81%	82%

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

Some rules for what can or cannot be packed in carry on or checked in luggage for international flights are known by less than half of international travellers (see the percentages shaded blue).

Thinking about the flight you're about to go on today. Q15 - Which of these items are okay to take in your carry-on bag and which are not okay?
 Q15a - Which of these items are okay to take in your checked-in bags and which are not okay?

% of international travellers that know each rule


International flights

	Carry on		Checked in	
An apple	✓	49%	✓	39%
Bottle of water (250ml)	✗	59%	✓	63%
Butter (500g)	✗	67%	✓	44%
Can of Coke (330ml)	✗	69%	✓	48%
E-cigarette (x1)	✓	23%	✗	41%
Fireworks	✗	97%	✗	91%
Gin (750ml) in a Security Tamper Evidence bag	✗	37%*	✓	69%
Laptop (x1)	✓	96%	✓	68%
Lighter (x1)	✓	25%	✗	61%
LPG Bottle	✗	92%	✗	88%
Manuka Honey (500g)	✗	57%	✓	62%
Perfume (75ml)	✓	74%	✓	87%
Perfume (125ml)	✗	63%	✓	81%
Power Bank (x1) (a portable battery)	✓	53%	✗	50%
Power Drill	✗	90%	✓	41%
Prescription medicine	✓	94%	✓	94%
Scissors with 10cm blade	✗	95%	✓	63%
Snow Globes	✗	51%	✓	53%
Swiss Army Knife with 7cm blade	✗	94%	✓	58%
Talcum Powder (400ml)	✗	57%	✓	70%
Toothpaste (80ml)	✓	80%	✓	89%

✓
Allowed in that type of bag

✗
Not allowed in that type of bag

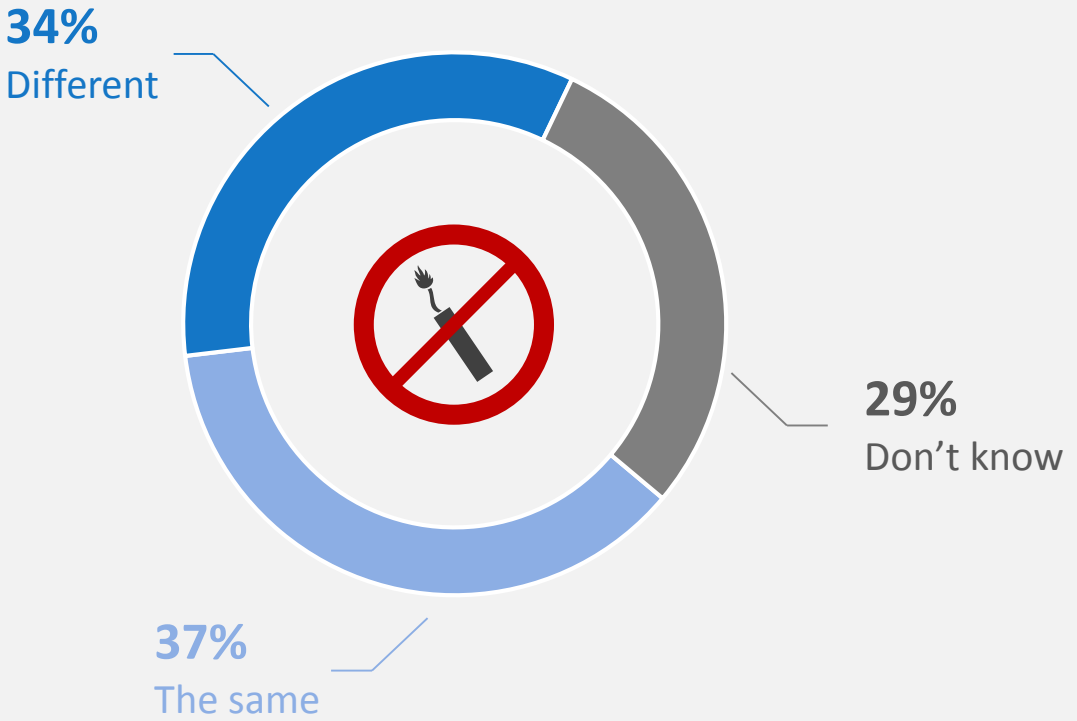
Particularly low awareness

CAA should prioritise raising awareness that:

E-cigarettes cannot be placed in checked in luggage on international flights.

Just three in ten international travellers know that the rules for what can or cannot be packed in your carry on or checked in bags for domestic or international flights are different.

Q16 - Are the New Zealand restrictions on items in luggage the same or different for domestic and international flights?



International travellers who live in New Zealand are more likely than those who live overseas to know the rules for the two types of flight differ.

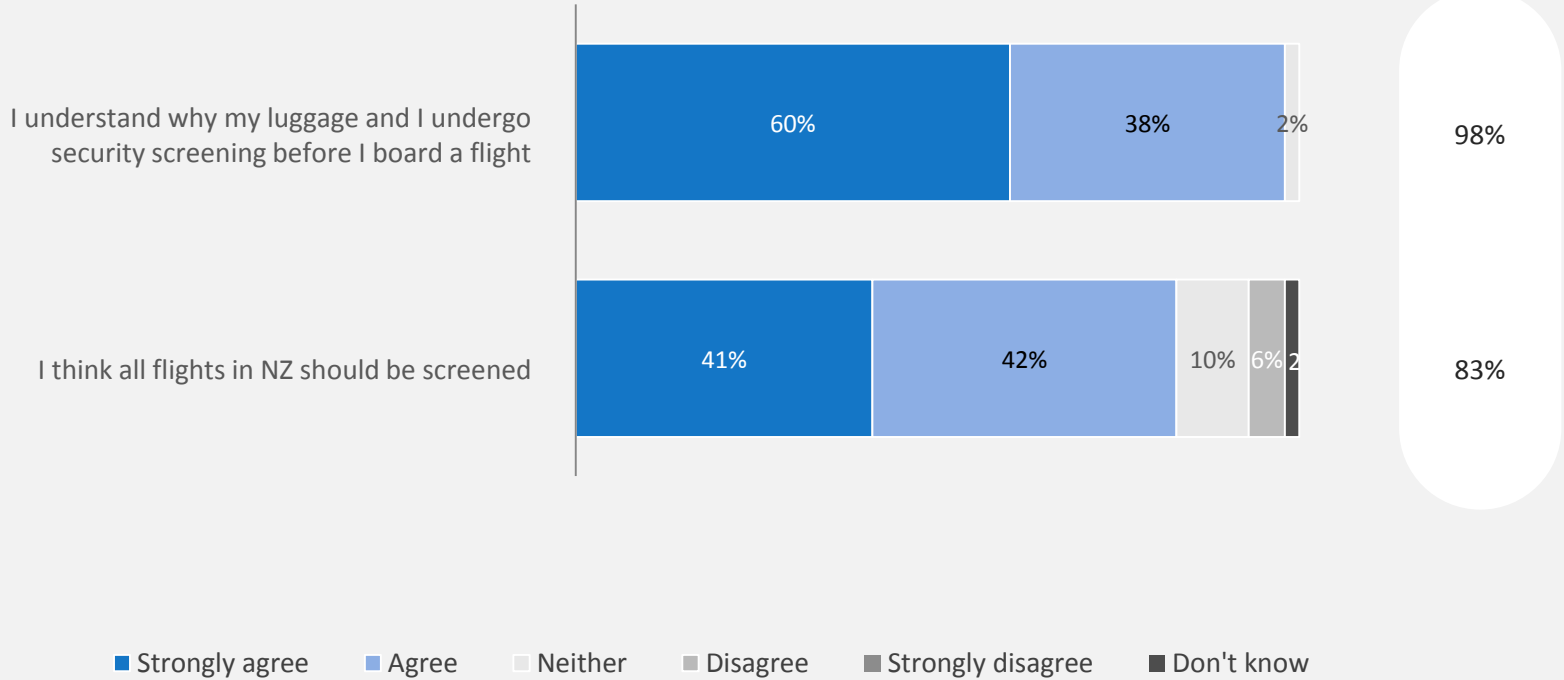
Those who have travelled domestically within New Zealand are more likely than those who haven't to know the domestic and international flight rules aren't the same.

Practically all international travellers understand why pre-flight personal security checks are conducted. The vast majority believe every New Zealand flight should be screened.

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

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

TOTAL agreement



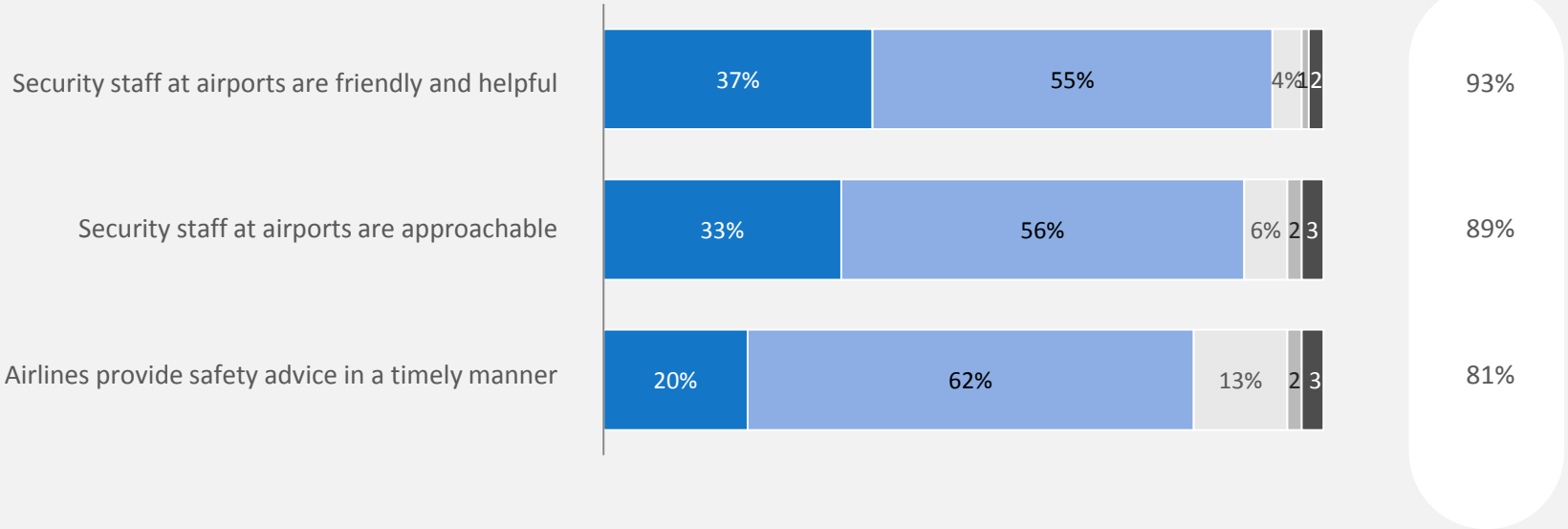
International travellers who have been on screened domestic flights within New Zealand are more likely than those who have been on unscreened domestic flights to think all flights should be screened.

Almost all international travellers agree the security staff at airports are friendly, helpful, and approachable, and most think airlines provide safety advice in a timely manner.

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

Perceptions of security staff and airline safety advice

TOTAL agreement



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

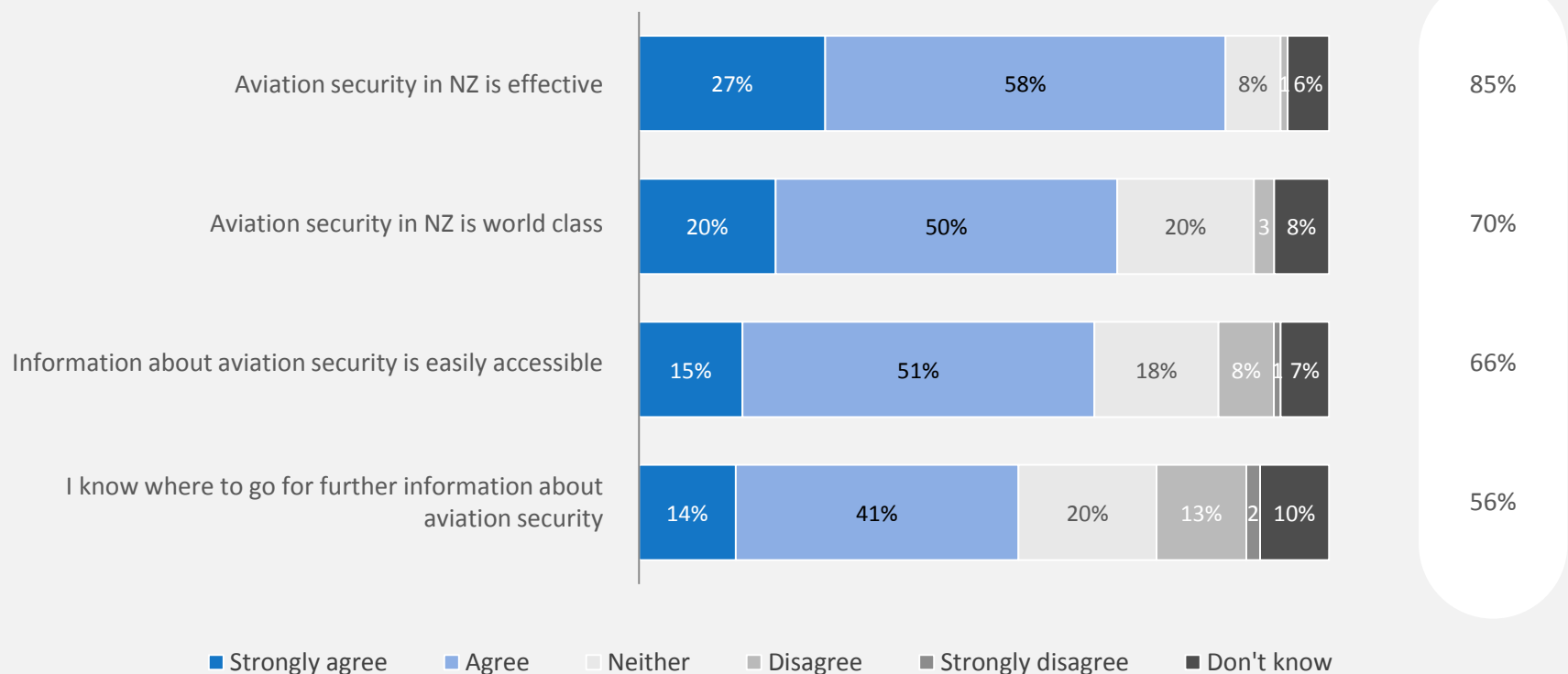
There are no subgroup differences in these results.

Most international travellers believe New Zealand aviation security is effective, and seven in ten think it is world class. The majority say information about aviation security is easily accessible and they would know where to go for additional information, but these areas have most room for improvement.

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

General perceptions of aviation security in New Zealand

TOTAL agreement



Older international travellers aged 55+ years are less likely than younger age groups to know where to access further information about aviation security from.

Results are similar to 2017, and all previous years.

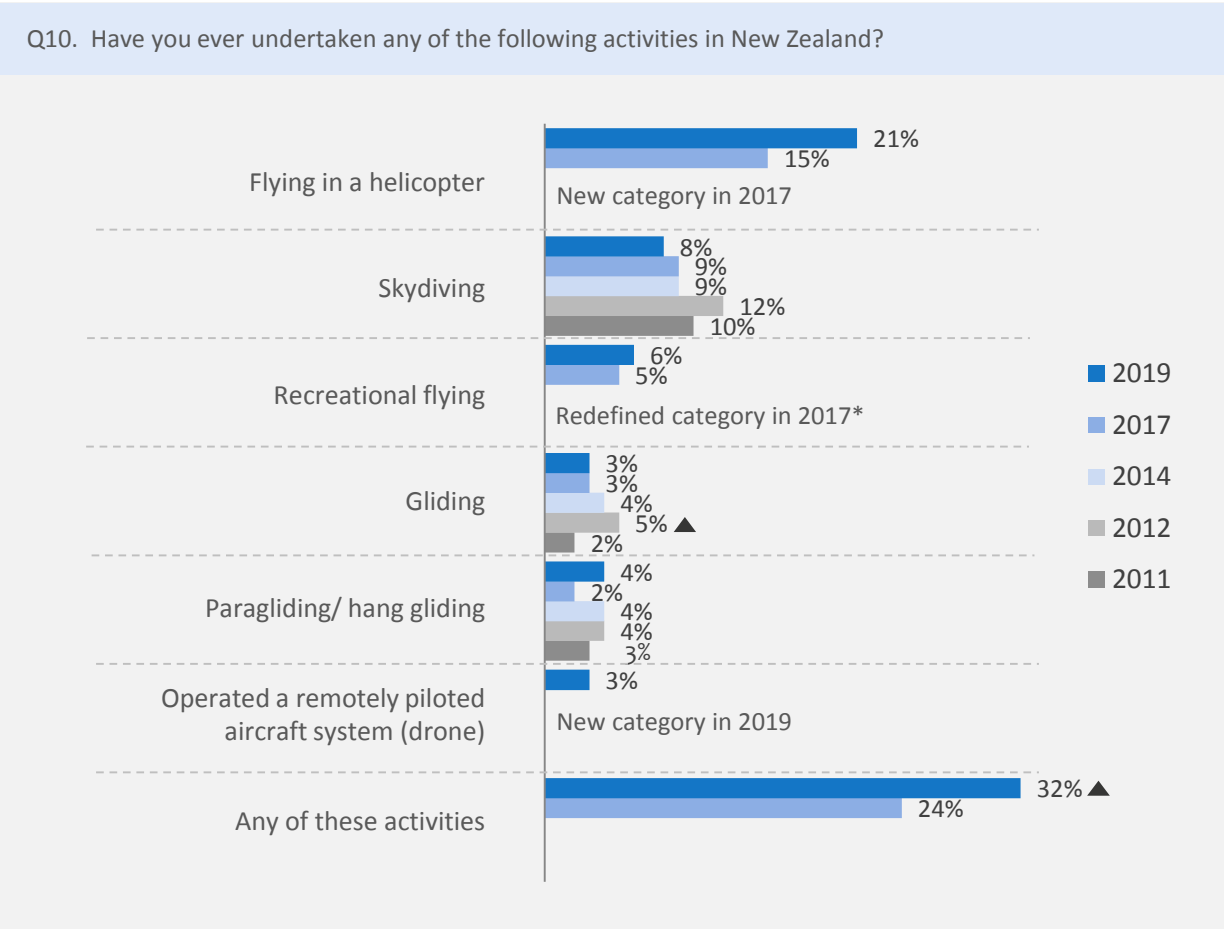
Q9. Please indicate how much you agree or disagree with each statement

Total agreement

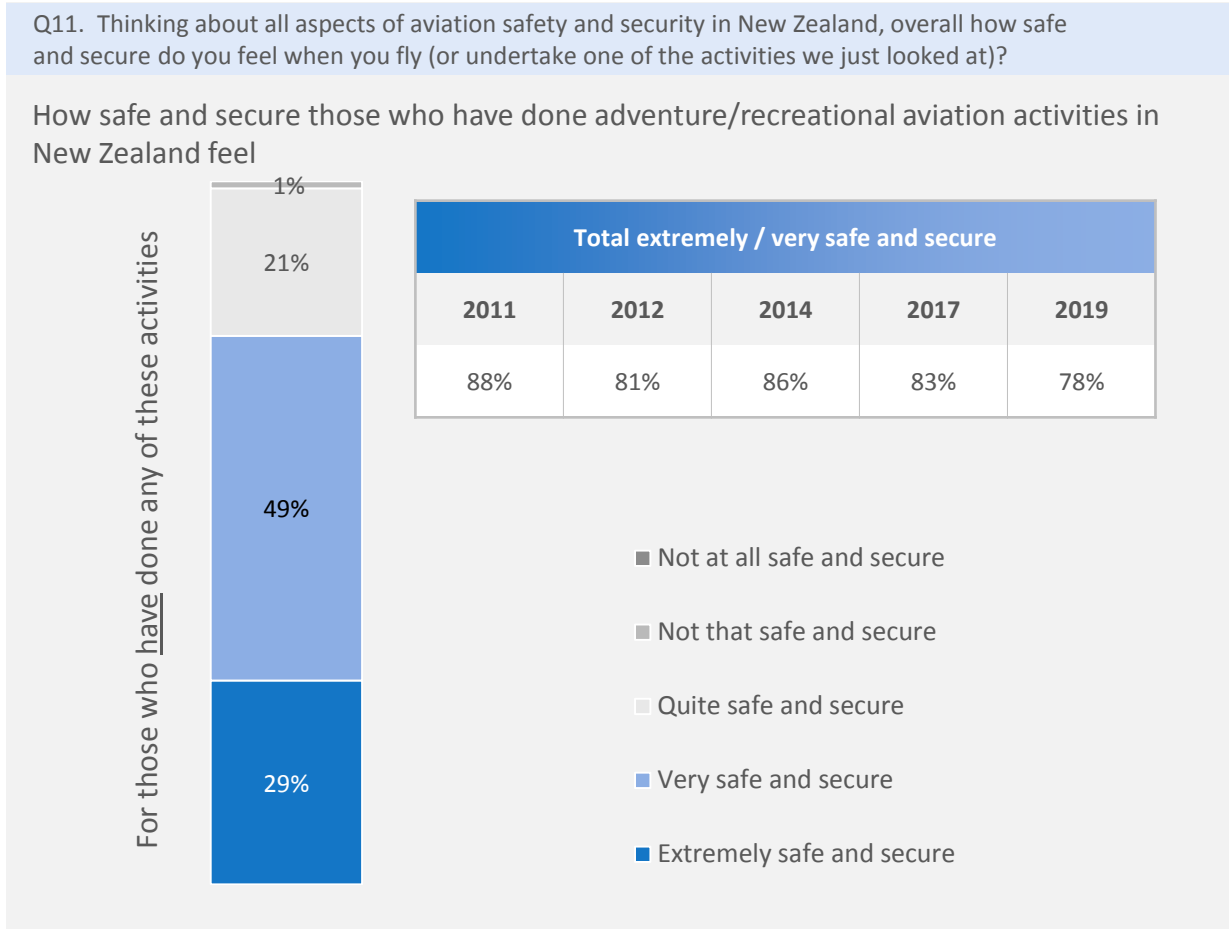
	2011	2012	2014	2017	2019
I understand why my luggage and I undergo security screening before I board a flight	100%	99%	100%	98%	98%
I think all flights in NZ should be screened	82%	80%	86%	84%	83%
Security staff at airports are friendly and helpful	92%	93%	93%	93%	93%
Security staff at airports are approachable	89%	90%	93%	90%	89%
Airlines provide safety advice in a timely manner	80%	81%	83%	81%	81%
Aviation security in New Zealand is effective	87%	85%	91% ▲	88%	85%
Aviation security in New Zealand is world class	70%	73%	80% ▲	74%	70%
Information about aviation security is easily accessible	60%	65%	61%	65%	66%
I know where to go for further information about aviation security	50%	52%	51%	54%	56%

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

More international travellers have done at least one of the adventure or recreational aviation activities listed below than in 2017. Reasons include a slight, but not significant increase in helicopter flying, paragliding or hang gliding, and recreational flying. Drone operation was included in 2019, and one in thirty say they have done this in New Zealand. Participants feel highly safe and secure when flying or doing these types of activities here.



Bases: All international travellers (2011 n=310; 2012 n=325; 2014 n=327; 2017 n=329; 2019 n=302)
 * 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; 2019 n=98)

International travellers rate the risk involved in undertaking each adventure and recreational activity in a similar way to 2017. Paragliding, hang gliding and sky diving are still seen as most risky overall, and helicopter flying the least. A comparison of the perceptions of participants versus non participants in the activities is presented on the next two pages (where base numbers are adequate).

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	
	2017	2019	2017	2019	2017	2019	2017	2019	2017	2019
Extremely / very risky	16%	12%	58%	46%	37%	30%	35%	31%	57%	48%
Quite risky	27%	28%	24%	32%	36%	40%	37%	39%	29%	33%
Not that / not at all risky	57%	59%	19%	21%	27%	30%	28%	31%	14%	18%
Total extremely / very / quite risky	43%	41%	81%	79%	73%	70%	72%	69%	86%	82%

Bases: All international travellers (Flying in a helicopter 2017 n=324; 2019 n=289) (Sky diving 2017 n=328; 2019 n=271) (Recreational flying 2017 n=326; 2019 n=253) (Gliding 2017 n=323; 2019 n=258) (Paragliding/hang gliding 2017 n=323; 2019 n=260). Don't know responses excluded

Perceptions of flying in a helicopter



KEY RESULTS

- 3 in 10 (30%) of those who have taken a helicopter flight in New Zealand think there is risk involved in the activity. Those who haven't flown in a helicopter in New Zealand are more likely to believe there is risk involved (44%).
- Almost 8 in 10 (79%) of the international travellers who have been on a helicopter ride in New Zealand feel safe and secure when flying or taking part in aviation activities in New Zealand.
- Note that flying in a helicopter was included as a category for the first time in 2017.

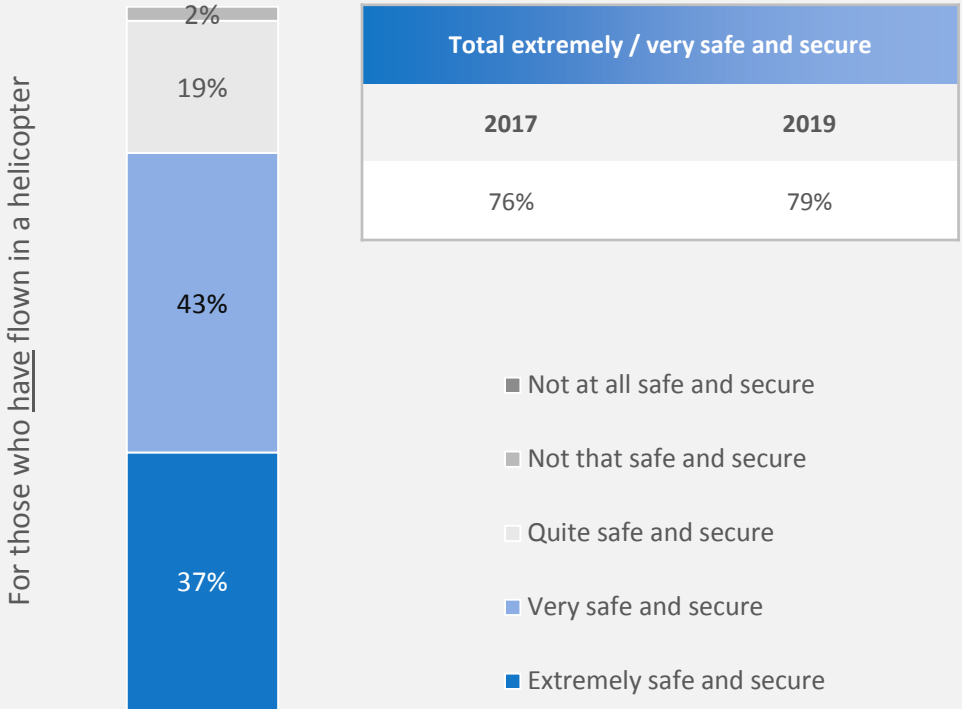
Q11a. Please indicate how risky you think each of these activities is to the personal safety of the people that undertake them

PERCEIVED RISK OF FLYING IN A HELICOPTER	Have not flown in a helicopter (n=223)		Have flown in a helicopter (n=63)	
	2017	2019	2017	2019
Extremely / very risky		14%	6%	
Quite risky		30%	24%	
Not that / not at all risky		56%	70%	
Total extremely / very / quite risky	43%	44%	40%	30%

Bases: International travellers who have not flown in a helicopter (2017 n=277; 2019 n=223), International travellers who have flown in a helicopter (2017 n=47; 2019 n=63). 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

- Two thirds of the international travellers who have sky dived in New Zealand (67%) feel the activity is risky. Those who haven't sky dived in New Zealand before are more likely than sky divers to think the activity involves risk (81%). The perceived risk of sky diving was included for the first time in 2017.
- Nearly 9 in 10 (88%) of sky divers feel safe and secure when flying or undertaking aviation activities in New Zealand, a similar proportion to 2017.

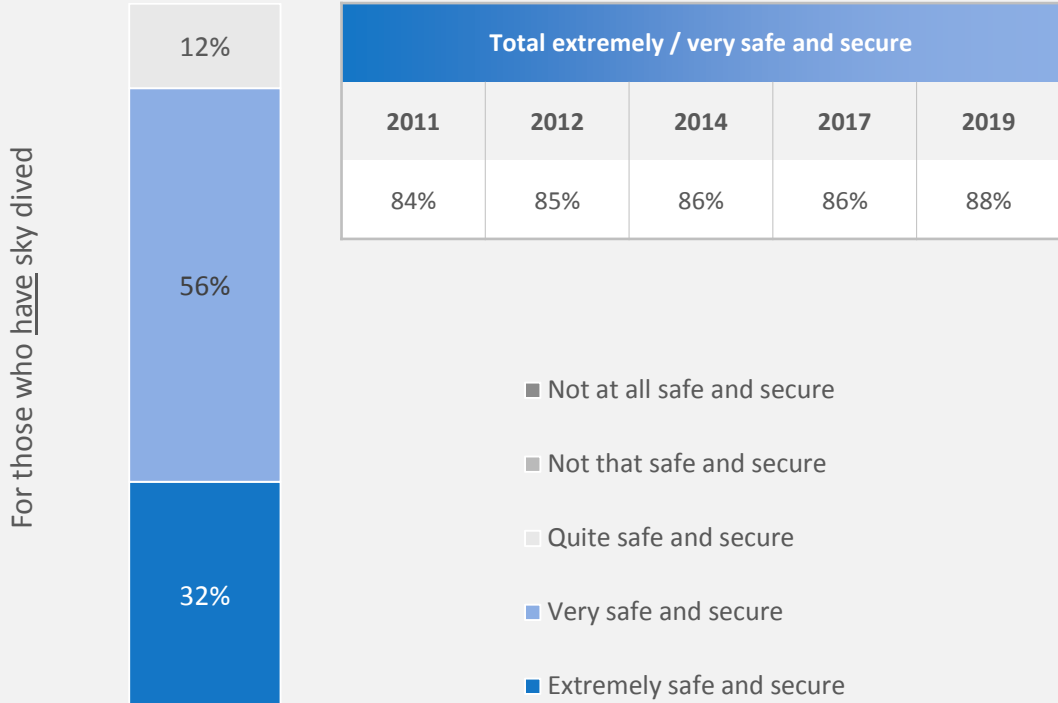
Q11a. Please indicate how risky you think each of these activities is to the personal safety of the people that undertake them

PERCEIVED RISK OF SKY DIVING	Have not sky dived (n=244)		Have sky dived (n=24*)	
	2017	2019	2017	2019
Extremely / very risky	47%	46%	46%	46%
Quite risky	34%	21%	21%	21%
Not that / not at all risky	19%	33%	33%	33%
Total extremely / very / quite risky	83%	81%	61%	67%

Bases: International travellers who have not sky dived (2017 n=300; 2019 n=244), international travellers who have sky dived (2011 n=32; 2012 n=40; 2014 n=28*; 2017 n=28*; 2019 n=24*). 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





Appendix



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 – 6,658,000 passengers departed New Zealand on international flights in 2018.
- connecting New Zealanders with each other – 13,384,000 passengers on board domestic flights within New Zealand in 2018; and
- enabling \$9.5 billion of exports to be flown from New Zealand airports during the 2017/2018 financial year.¹

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

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

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

The value of understanding perceptions of safety

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

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

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

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

Research method



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

- Online survey of 1,042 New Zealanders aged 18 years and over who have travelled by air in, or from, New Zealand within the last 12 months.
- Sample sourced from Colmar Brunton's online panel (around 100,000 members) and panel partners.
- Average time to complete survey was approximately 10 minutes.
- 29% response rate was achieved.
- All interviews were completed during the period of 29 April to 9 May 2019.
- Maximum margin of error for the total sample of 1,042 interviews is +/- 3.0% at the 95% confidence level.



Research method for intercept survey of international air travellers at airports

- Intercept survey of 302 international travellers at departure lounges at Auckland International Airport (198 interviews) and Wellington International Airport (104 interviews).
- Of the 302 international travellers surveyed, 105 had mainly lived in New Zealand in the last 12 months and 197 had mainly lived overseas in the last 12 months, with the most common countries being Australia, the UK, the USA, Canada and China.
- Average interview length was approximately 10 minutes.
- 70% response rate was achieved.
- All interviews were completed from 6 to 12 May 2019.
- Maximum margin of error for the total sample of 302 interviews is +/- 5.6% at the 95% confidence level.



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