



Civil Aviation Authority Feel Safe research

2024 survey findings

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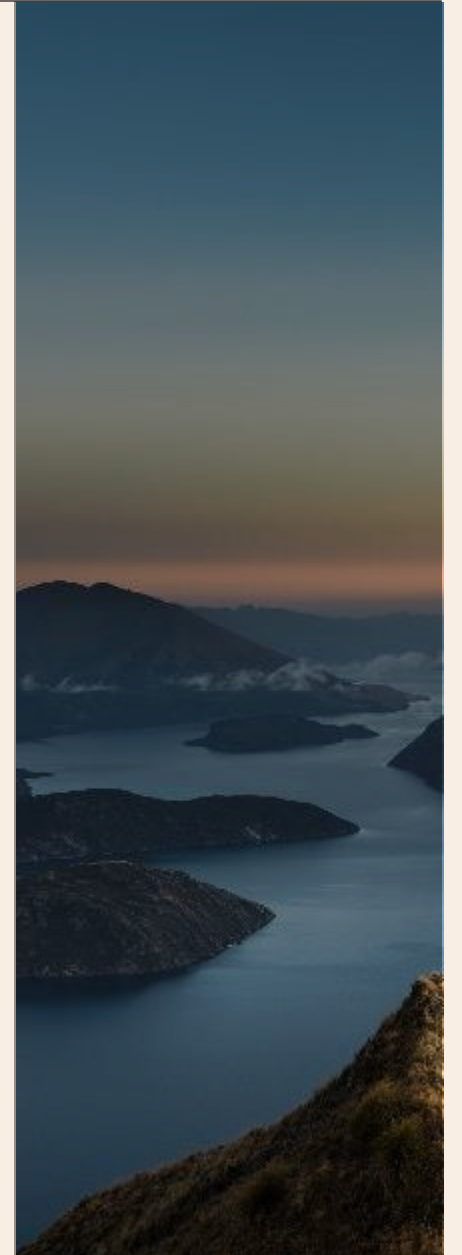
2 International traveller survey results

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

Knowledge around aviation safety and security

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

Appendix



An aerial photograph of a wind farm. Three white wind turbines are visible, situated on a hillside covered in dense green forest. The turbines are arranged in a line, with the largest one in the foreground. A winding road or path is visible on the right side of the hill. In the background, a valley with patchwork fields and a rainbow are visible under a cloudy sky.

Research overview

Research programme

1.



Online survey of air travellers
who live in New Zealand

2.



Intercept survey of international air
travellers at airports

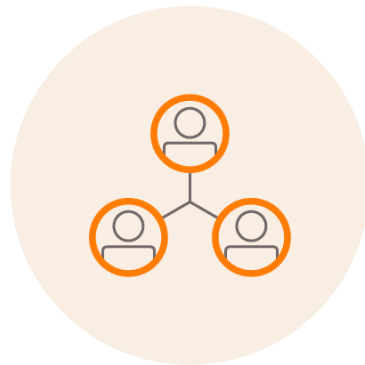
Research objectives

1.



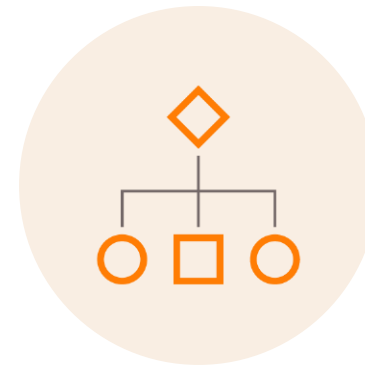
Measure changes in perceptions of safety over time*

2.



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

3.



Identify the key things that influence and inform perceptions of safety

4.



Measure and track aviation rule knowledge



Summary of findings

Summary



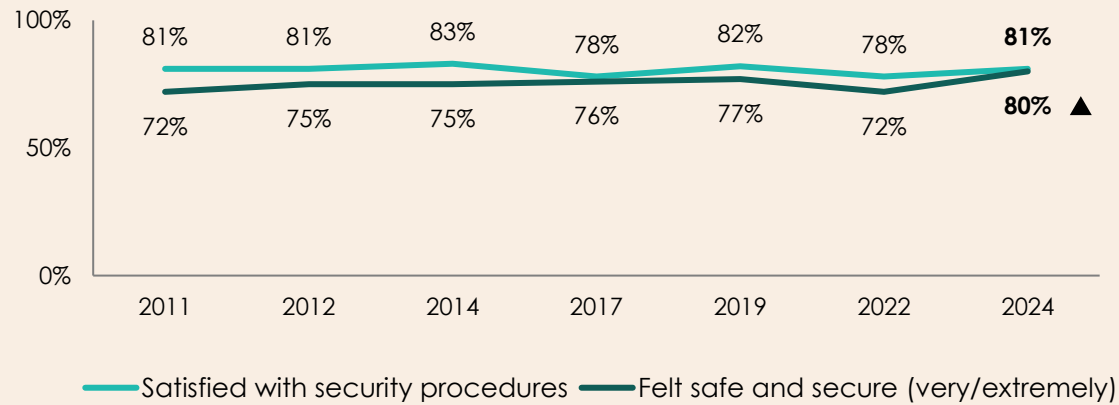
Method: Survey 1. Online survey of 1,004 New Zealand resident travellers.
Survey 2. Intercept survey of 305 International travellers at Auckland airport.

Fieldwork dates:
1 to 14 November 2024

Satisfaction with security procedures and feelings of safety and security

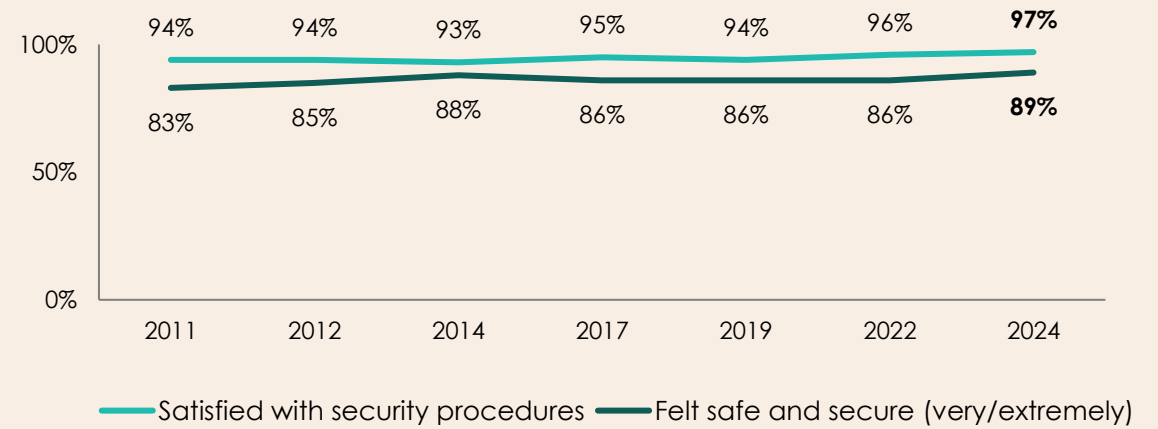
New Zealand resident travellers

Feelings of safety and security and general satisfaction with aviation security have improved among New Zealand travellers in 2024. This follows on from a dip seen in 2022.



International travellers

International travellers continue to feel very satisfied, and generally very safe and secure in aviation settings.



Summary



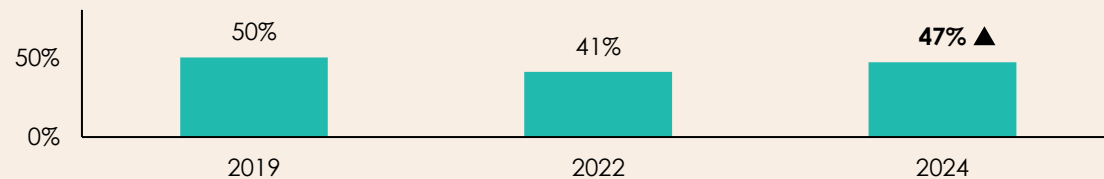
Method: Survey 1. Online survey of 1,004 New Zealand resident travellers.
Survey 2. Intercept survey of 305 International travellers at Auckland airport.

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Knowledge of aviation security rules

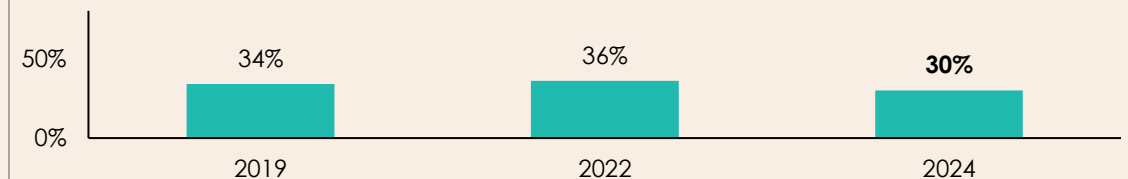
New Zealand resident travellers

Approximately half (47%) of travellers know that the luggage rules differ between domestic flights and international flights.



International travellers

A third (30%) of international travellers know the domestic and international rules are different. Looking specifically at overseas visitors, just 23% know New Zealand has different domestic and international rules.



Specific item knowledge is good and continues to improve.

This is true for both domestic and international travellers. Compared to 2022, more travellers now have a better understanding of what can be carried on in their hand luggage and what can go in check luggage. Improvements are particularly evident for international flights.

1. New Zealand resident traveller survey results

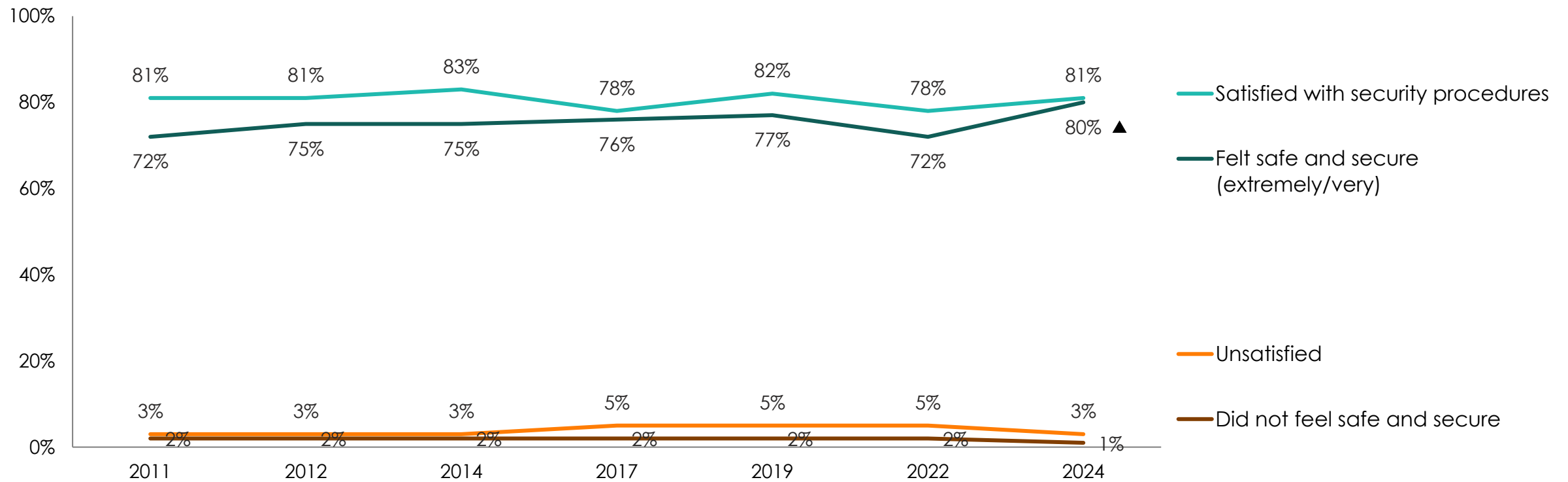
An aerial photograph of a coastline. On the left, a sandy beach is visible, with some sparse vegetation and a road. The ocean is a vibrant turquoise color, with white foam from waves crashing onto the shore. The overall scene is bright and clear.

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

Feelings of safety and security and general satisfaction with aviation security have recovered following a dip seen in 2022.

The proportion of travellers who feel extremely or very safe and secure while flying is now the highest it's been since the research began in 2011.

Satisfaction with security procedures and feelings of safety and security



Source: Q5 - Thinking only of the security checks at the airport before boarding your flight, and not the airline that you flew, how satisfied were you that the security procedures you undertook were going to keep you safe and secure for the duration of your flight? Q7 - Overall how safe and secure did you feel on your most recent flight?

Base: All NZ resident travellers (2011 n=1,036, 2012 n=1,052, 2014 n=1,229, 2017 n=1,000, 2019 n=1,042, 2022 n=1,001, 2024 n=1,004).

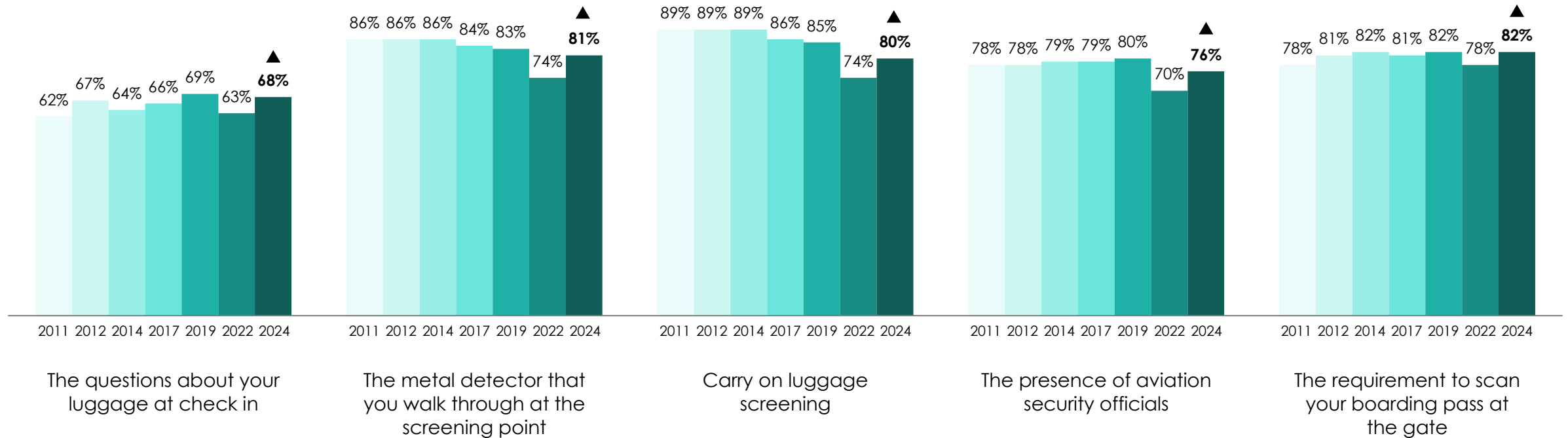
Significantly higher than 2022 ▲
Significantly lower than 2022 ▼

Perceptions around the importance of security procedures have also improved between 2022 and 2024.

Measures now sit broadly in line with 2019 findings.

Importance of individual security procedures

% very / extremely important



Source: Q9a - Please indicate how important or unimportant you think each of these security procedures is in keeping people safe and secure when they fly.
Base: All NZ resident travellers (2011 n=1,036, 2012 n=1,052, 2014 n=1,229, 2017 n=1,000, 2019 n=1,042, 2022 n=1,001, 2024 n=1,004).

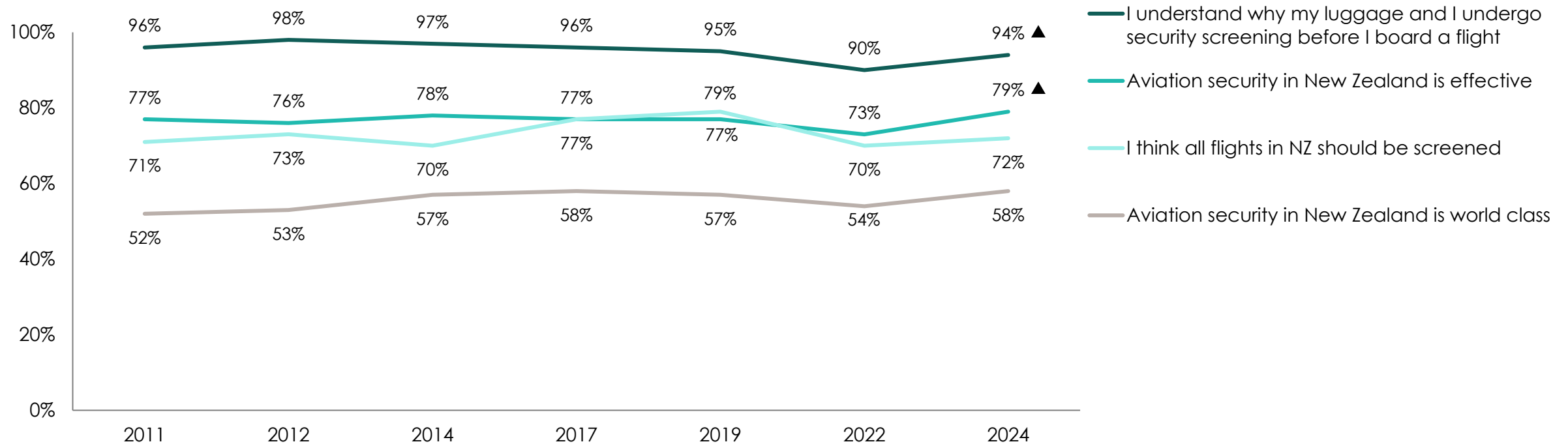
Significantly higher than 2022 ▲
 Significantly lower than 2022 ▼

Compared to 2022, more travellers now understand why they and their luggage undergo screening and feel that aviation security in New Zealand is effective.

A small increase is also evident in the proportion of travellers who think New Zealand aviation security is world class.

Perceptions around security screening

% agree / strongly agree



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

Base: All NZ resident travellers (2011 n=1,036, 2012 n=1,052, 2014 n=1,229, 2017 n=1,000, 2019 n=1,042, 2022 n=1,001, 2024 n=1,004).

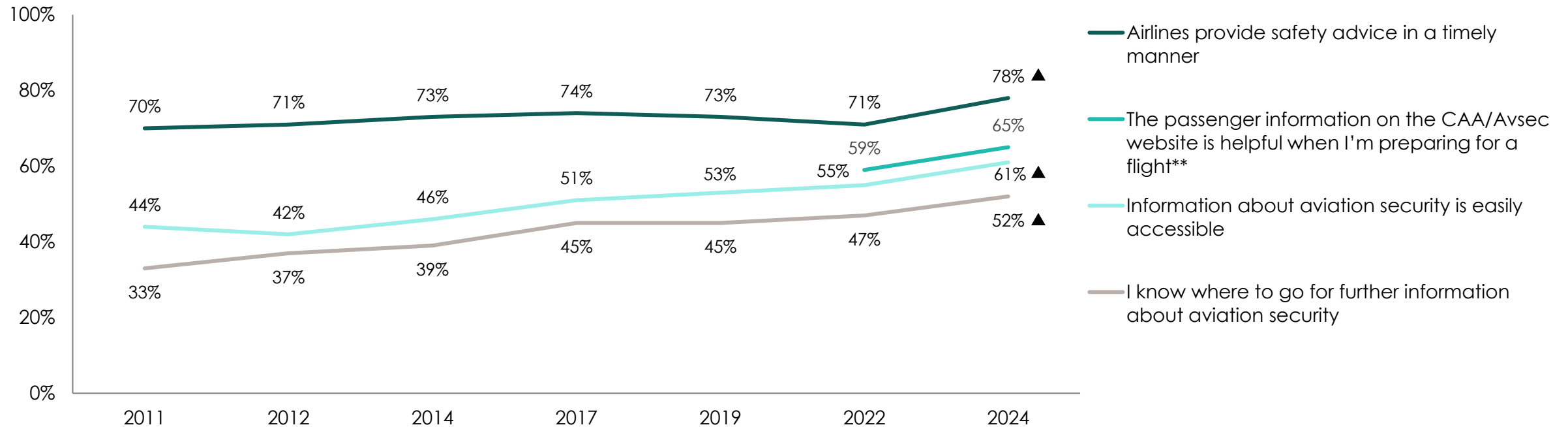
Significantly higher than 2022 ▲
Significantly lower than 2022 ▼

Findings around information delivery and accessibility are now the highest measured.

Significant improvements are evident for: airlines providing advice in a timely manner; aviation information being easily accessible; and knowledge of where to go for further information.

Perceptions about information delivery and accessibility

% agree / strongly agree



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

Base: All NZ resident travellers (2011 n=1,036, 2012 n=1,052, 2014 n=1,229, 2017 n=1,000, 2019 n=1,042, 2022 n=1,001, 2024 n=1,004).

Notes: * Statement asked for the first time in 2022. * Don't knows removed from base.

Significantly higher than 2022 ▲
Significantly lower than 2022 ▼

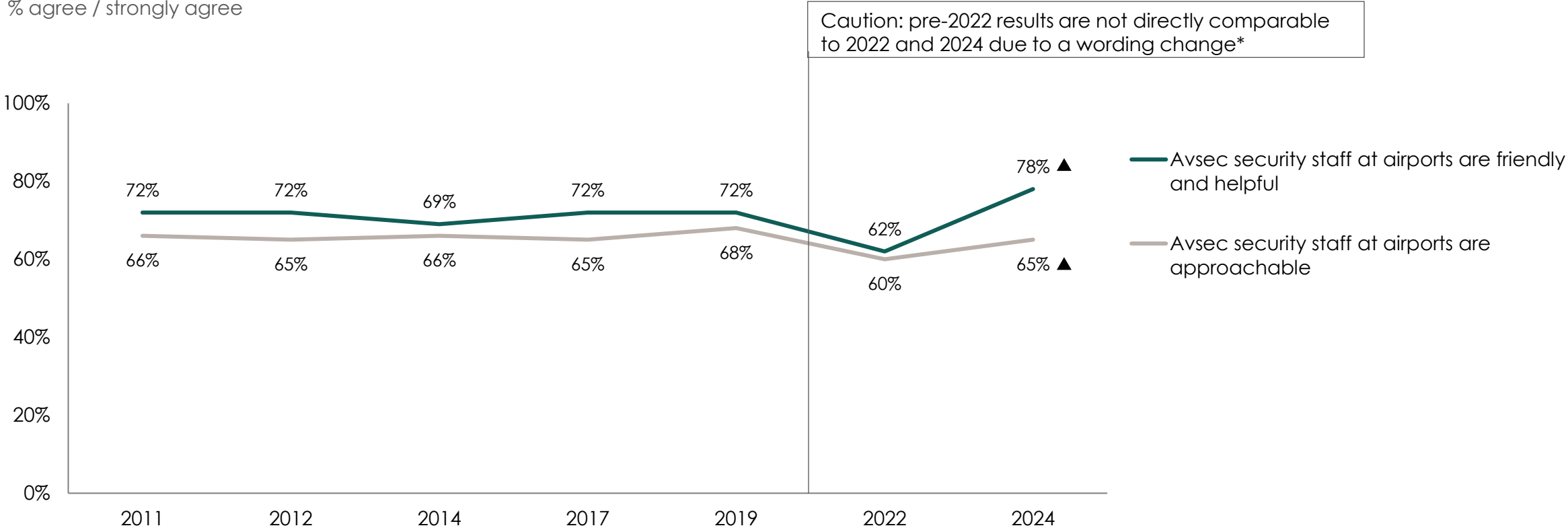
Perceptions of Avsec staff are greatly improved in 2024.

Compared to 2022, more travellers now say they find staff friendly and helpful, and approachable.

Perceptions of AVSEC staff

% agree / strongly agree

Caution: pre-2022 results are not directly comparable to 2022 and 2024 due to a wording change*

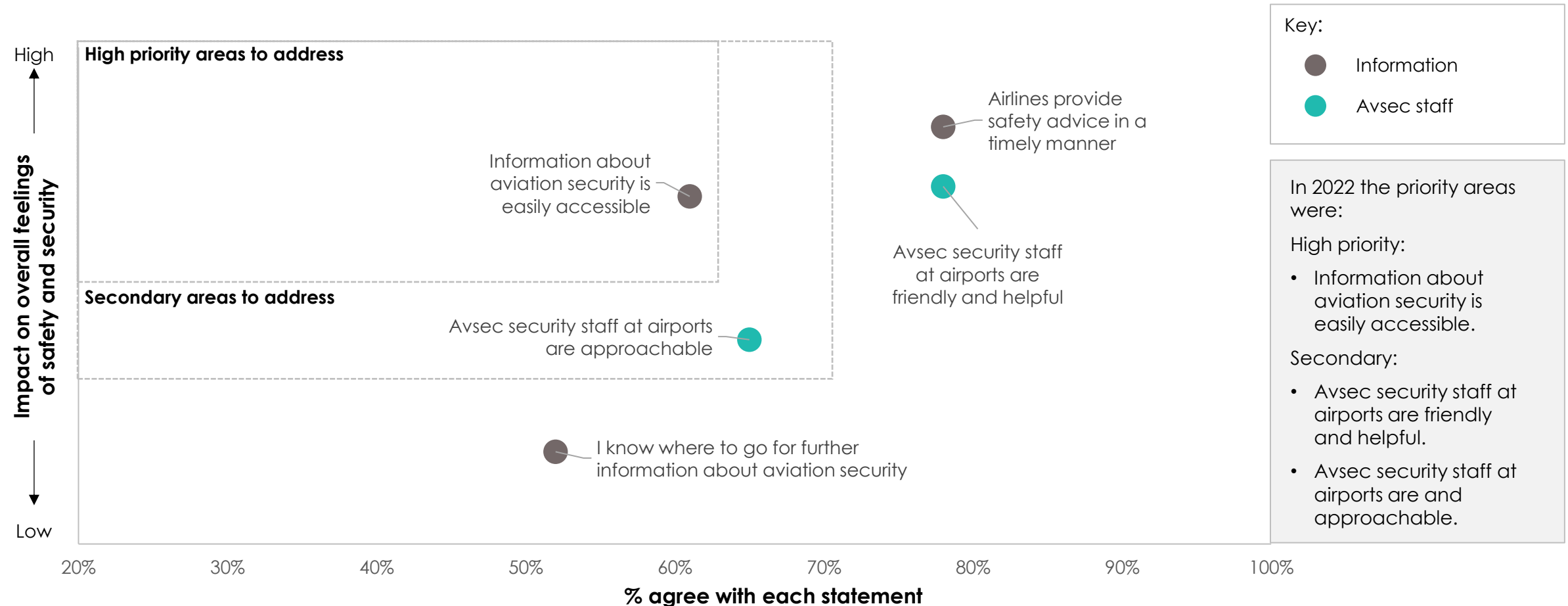


Source: Q9b - Please indicate how much you agree or disagree with each statement.
 Base: All NZ resident travellers (2011 n=1,036, 2012 n=1,052, 2014 n=1,229, 2017 n=1,000, 2019 n=1,042, 2022 n=1,001, 2024 n=1,004).
 Notes: * in 2022 both statements were reworded to specifically include 'Avsec'.

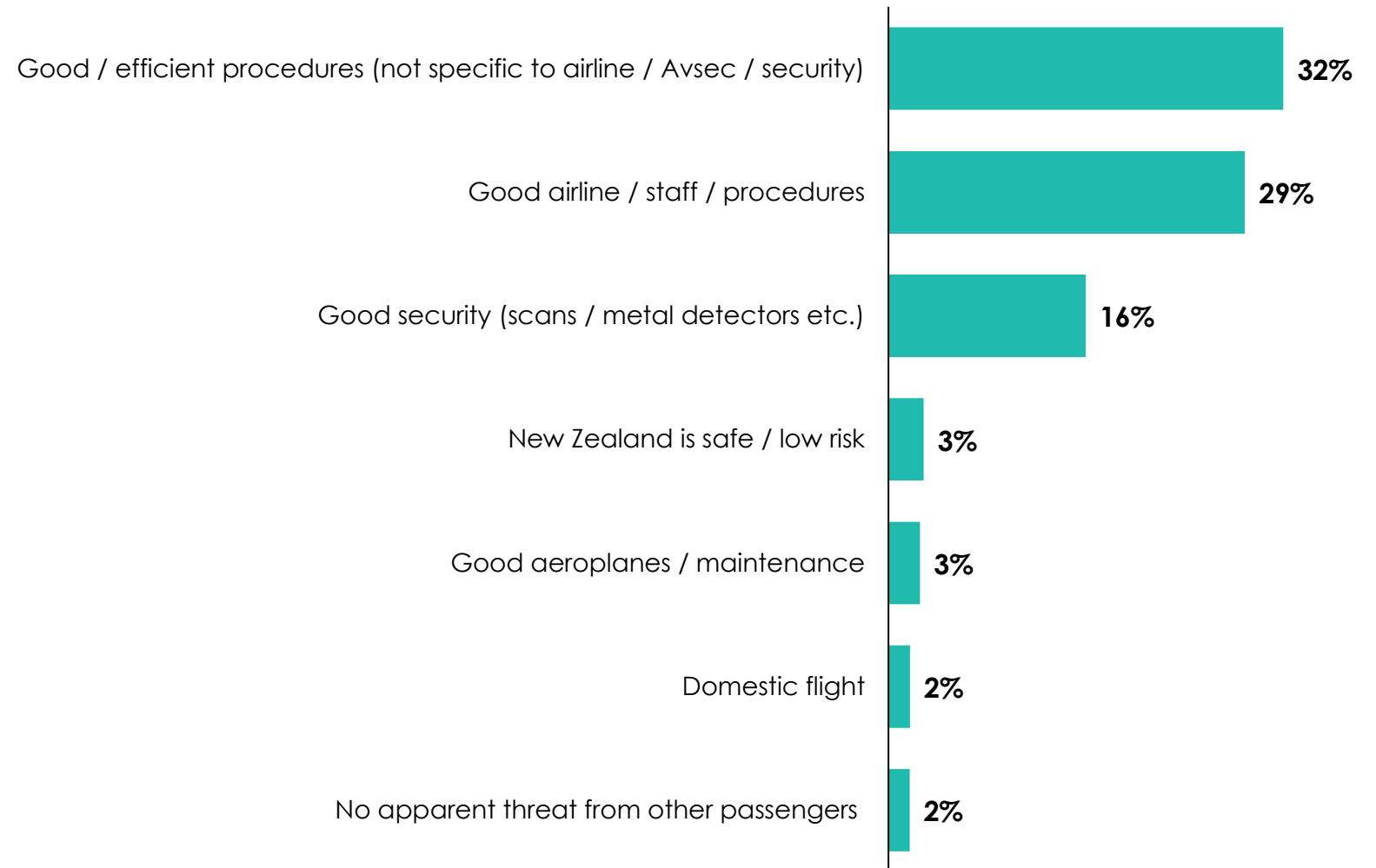
Significantly higher than 2022 ▲
 Significantly lower than 2022 ▼

When we look at what drives overall feelings of safety and security, two areas stand out for improvement: security information being easily accessible and Avsec staff being approachable.

These areas are important to overall feelings of safety and security, particularly aviation security information being easily accessible. Any improvements in these areas would help raise overall feeling of safety and security.



We asked travellers who were satisfied with security procedures why they felt this way. The most commonly mentioned themes were: good procedures (32%), good airlines (29%), and good security (16%).



Source: Q8 - You answered that you felt [extremely/very/quite safe and secure] on your most recent flight. Please explain what specifically about that flight made you feel [extremely/very/quite safe and secure]?

Base: NZ resident travellers who felt extremely/very/quite safe and secure on their most recent flight (2024 n=989).

Note: Responses under 2% are not included in chart.

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



Good / efficient procedures

Everything went smoothly and as it should. There were no moments where it felt like something had gone wrong.

All protocols in place before and during the flight, whilst objectively tedious, made me feel confident that all appropriate measures were taken to ensure passenger safety.

My last flight was only a few days ago ex Wellington to Dunedin. All aspects from boarding, flight time and disembarking were well communicated and smoothly operated.

Staff were knowledgeable and vigilant, nothing happened that made me consider my safety was at risk.



Good airline / staff / procedures

Good staff that knew the procedures, good safety briefing and a known trustworthy airline that values safety/security.

I feel confident in AirNZ and the ability of crew to manage situations.

Modern aeroplane, fantastic safety briefing videos, very professional flight crew, checked and double-checked doors were locked by their peers, great communication from flight cockpit to cabin crew and vice versa.

The flight attendants did a great job ensuring I felt safe to fly with them.



Good security

I knew that everyone had been screened and the likelihood of anyone doing anything dangerous was very low regardless.

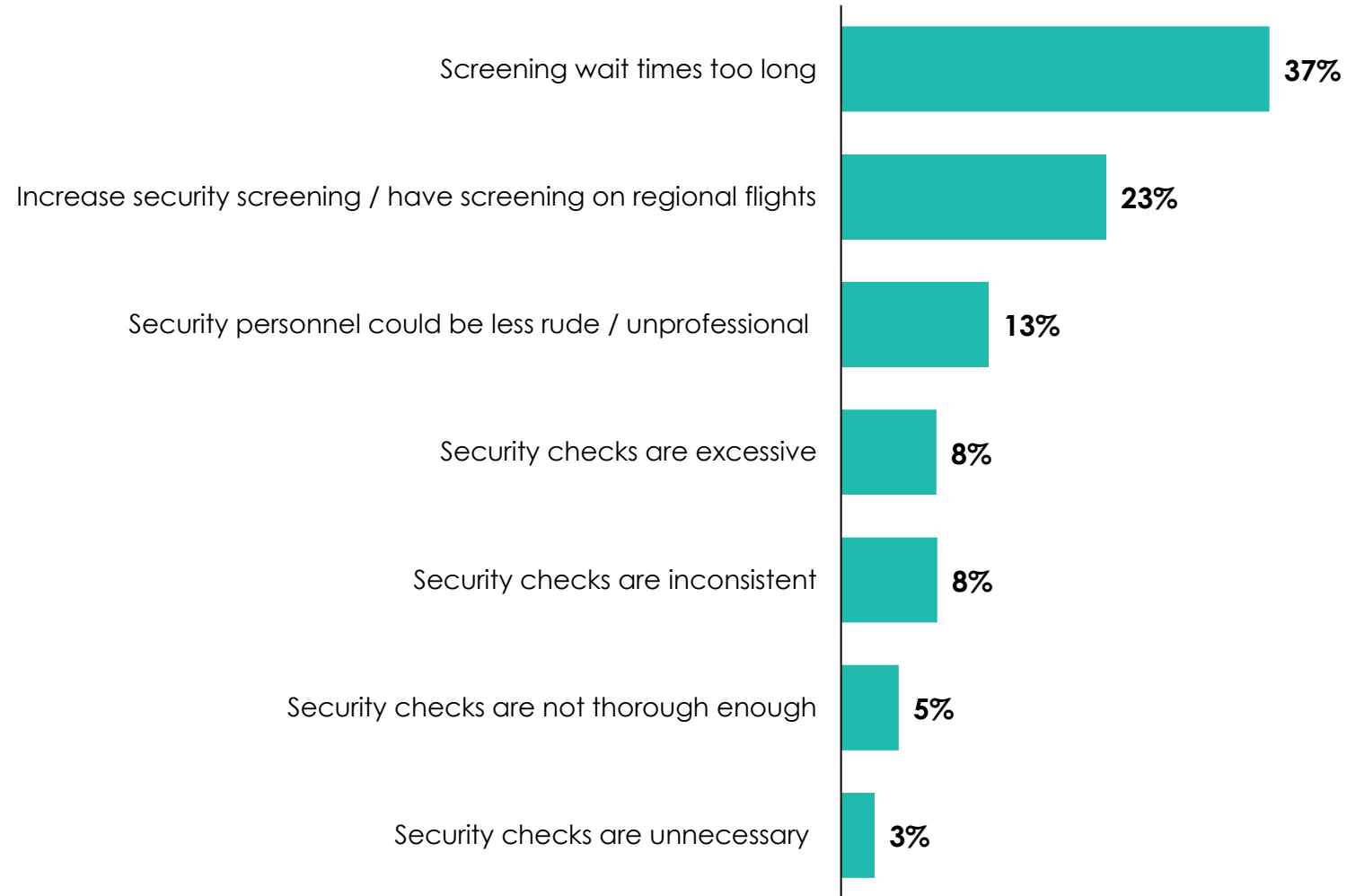
No issues, scanning always picks up something on me (belt etc) so at least you know the system works.

They were using the latest scanning tech, sending people back who set off the metal detector, randomly picking people for full body scan or further scans with the wand.

The security check before passenger onboard is very detailed and thoroughly done.

Security staff checked everyone's carry on luggage thoroughly.

Those who were dissatisfied with the security process generally talked about the wait times being too long. Many also mentioned a desire to see improved screening on regional flights.



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

Base: NZ resident travellers who were dissatisfied with the security checks on their most recent flight (2024 n=34).

Note: Responses under 2% are not included in chart.

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



Screening wait times too long

The security check takes longer now and there are less lines to process will take now an average two hours to get past.

Ques for security screening, when there is another lane for screening they should use it.

All this security stuff is mass overkill and the queues it creates is enough to put you off travelling. I don't need to be asked if there is anything in my pockets or if there is a laptop in my bag.

Wheelchairs are now going through security after the flight. This is stupid and slows down someone with a disability.



Increase security screening / have screening on regional flights

Regional flight minimal security checks.

I can't quite understand why there is no security check between Christchurch and Dunedin and I'm sure that's the same for other smaller distance domestic flights, but it still feels strange.

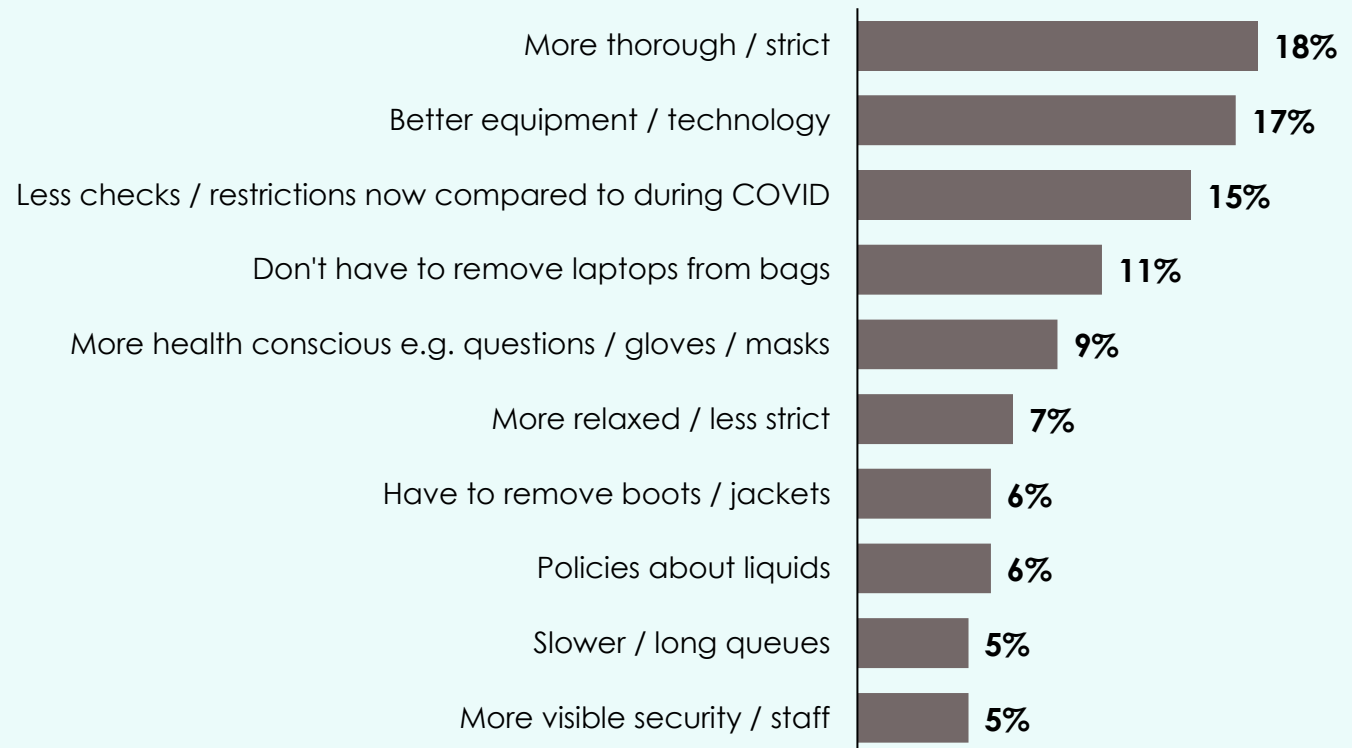
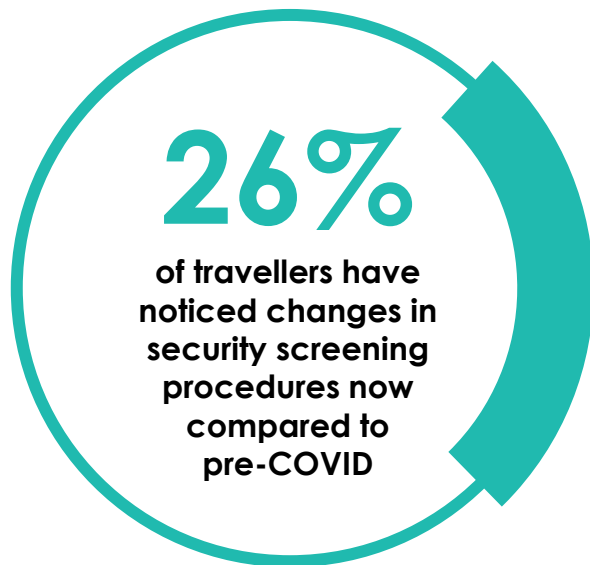
There is no security check for weapons regionally. E.g. Napier or for non-jet flights anywhere in NZ.

I didn't have to go through any security at all so a scanner at least would help.

One in four travellers said they have noticed changes to screening procedures now compared to pre-COVID.

When asked what those differences were responses were varied but many said they felt procedures were now stricter and that there was better technology and equipment being used.

Pre-COVID vs. post-COVID



Source: Q9c - Thinking about security screening procedures before the COVID versus now. Have you noticed any changes in the screening procedures?

Base: All NZ resident travellers (n=1,004).

Source: Q9d - What changes have you noticed?

Base: Those who have noticed a difference (2024 n=228).

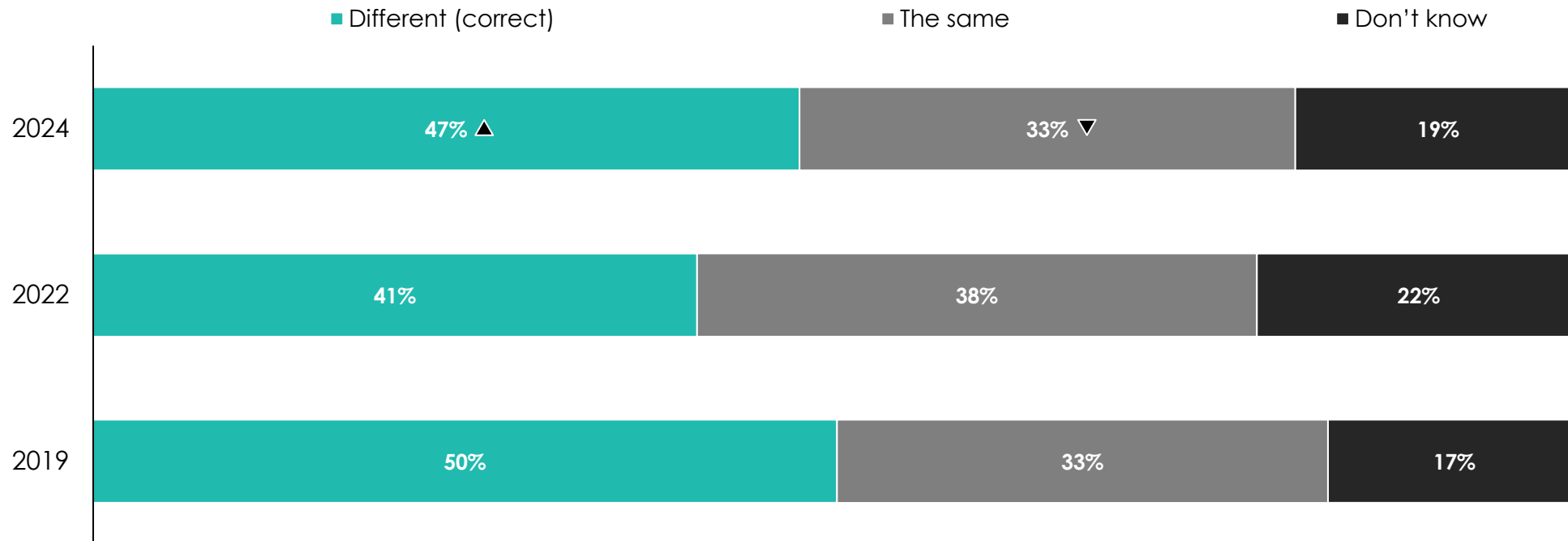


Knowledge around aviation safety and security

Compared to 2022, more travellers are now aware that there are different rules for domestic and international flights.

Nearly half of travellers correctly identified that the rules are different.

Knowledge of rule differences between domestic and international flights



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

Base: All NZ resident travellers (2019 n=1,042, 2022 n=1,001, 2024 n=1,004).

Notes: Not asked prior to 2019.

Significantly higher than 2022 ▲
Significantly lower than 2022 ▼

Specific knowledge of what can, and cannot, go in carry on or check luggage has improved in 2024.

However, there are still areas where knowledge is relatively low - these are highlighted below.

Knowledge of specific rules	Domestic flights										International flights								
	Carry on					Checked in					Carry on				Checked in				
		2022		2024			2022		2024			2022		2024			2022		2024
	Okay	Not okay	Okay	Not okay		Okay	Not okay	Okay	Not okay		Okay	Not okay	Okay	Not okay		Okay	Not okay	Okay	Not okay
AirPods / Earbuds	✓	93%		94%	✓	88%		78%		✓	88%		95%		✓	81%		80%	
Laptop (x1)	✓	95%		92%	✓	74%		69%		✓	89%		95%		✓	69%		66%	
Perfume (75ml)	✓	70%		71%	✓	82%		83%		✓	74%		75%		✓	72%		82%	▲
Prescription medicine	✓	92%		96%	✓	91%		90%		✓	90%		91%		✓	91%		88%	
Toothpaste (80ml)	✓	84%		85%	✓	86%		89%		✓	81%		79%		✓	84%		84%	
Bottle of water (250ml)	✓	73%		68%	✓	71%		70%		✗	59%		69%	▲	✓	54%		55%	
Butter (500g)	✓	55%		58%	✓	60%		59%		✗	53%		64%	▲	✓	40%		44%	
Can of Coke (330ml)	✓	56%		49%	✓	54%		55%		✗	72%		70%		✓	45%		44%	
Gin (750ml) in a Security Tamper Evidence bag	✓	56%		63%	✓	67%		65%		✗	31%		29%		✓	59%		69%	▲
Manuka Honey (500g)	✓	60%		59%	✓	74%		75%		✗	61%		65%		✓	55%		53%	
Perfume (125ml)	✓	48%		43%	✓	73%		74%		✗	70%		72%		✓	61%		66%	
Snow Globes	✓	30%		31%	✓	42%		49%		✗	40%		43%		✓	40%		45%	
Talcum Powder (400ml)	✓	37%		39%	✓	61%		62%		✗	52%		55%		✓	52%		58%	
e-cigarette / Vape (x1)	✓	30%		35%	✗	41%		47%		✓	23%		28%		✗	47%		49%	
Lighter (x1)	✓	17%		18%	✗	60%		60%		✓	20%		17%		✗	58%		65%	
Loose batteries (e.g., AA, AAA, or 9v)	✓	29%		35%	✗	49%		49%		✓	27%		36%	▲	✗	58%		59%	
Power Bank (x1) (a portable battery)	✓	52%		50%	✗	47%		54%		✓	43%		61%	▲	✗	45%		55%	▲
90Wh power tool battery (18 volt, 5.0Ah battery)	✓	13%		21%	✗	54%		62%		✓	22%		22%		✗	60%		59%	
Power Drill	✗		79%		79%	✓	38%		35%	✗	82%		83%		✓	39%		36%	
Scissors with 10cm blade	✗		87%		86%	✓	53%		50%	✗	85%		90%		✓	44%		52%	
Swiss Army Knife with 7cm blade	✗		86%		86%	✓	50%		47%	✗	91%		92%		✓	44%		49%	
Fire-works	✗		97%		94%	✗	91%		88%	✗	88%		93%		✗	87%		89%	
LPG Bottle	✗		90%		93%	✗	87%		87%	✗	88%		94%	▲	✗	82%		91%	▲

✓ Allowed in that type of bag

✗ Not allowed in that type of bag

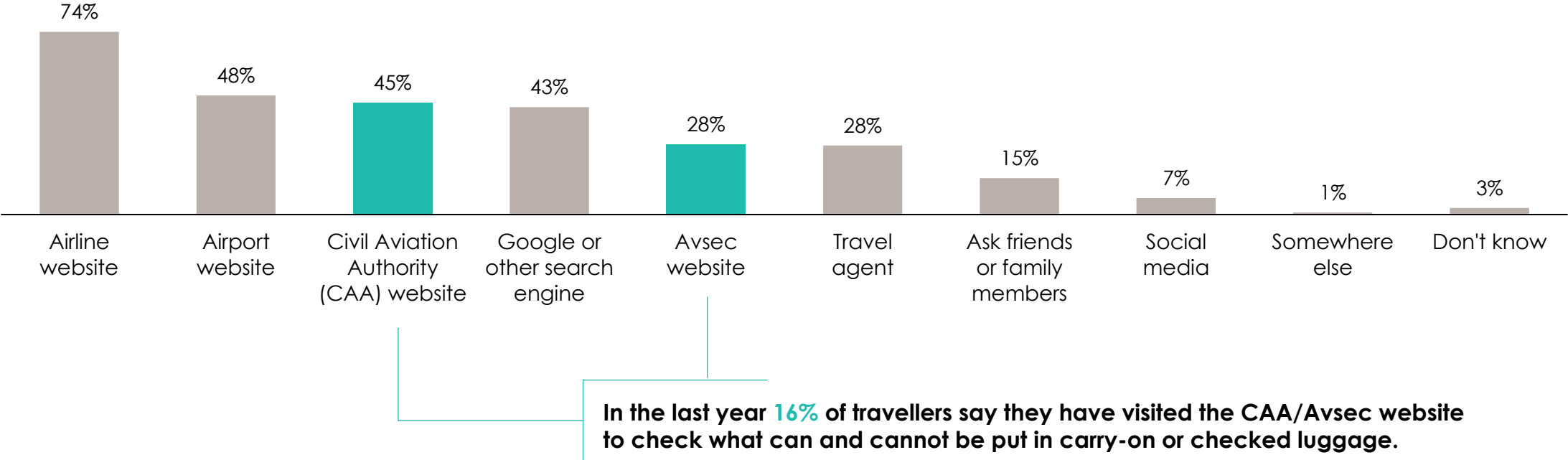
Particularly low awareness

Source: Q24. Imagine you were about to go on [insert a domestic flight within/ insert an international flight from] New Zealand. Q24a. Imagining again that you were about to go on [insert a domestic flight within/ insert an international flight from] New Zealand. Which of these items are okay to take in your checked-in bags and which are not okay?
 Base: NZ resident travellers who were answered about domestic flights (n=260), NZ resident travellers who were answered about international flights (n=260).


Most travellers say they would go to airline websites to find out what items they can and cannot fly with.

Not quite half said they would visit CAA's website and just over a quarter would visit Avsec's website. When asked about their behaviour over the last year, 16% of travellers said they have visited the ACC/Avsec website.

Information sources



Source: Q16a - Where would you go to find out what you can and can't take with you on a flight?
Q25a - In the last 12 months have you visited the CAA/Avsec website to check what you can and can't put in your carry-on and checked luggage?
Base: All NZ resident travellers (2024 n=1,004).
Notes: Not asked prior to 2024.

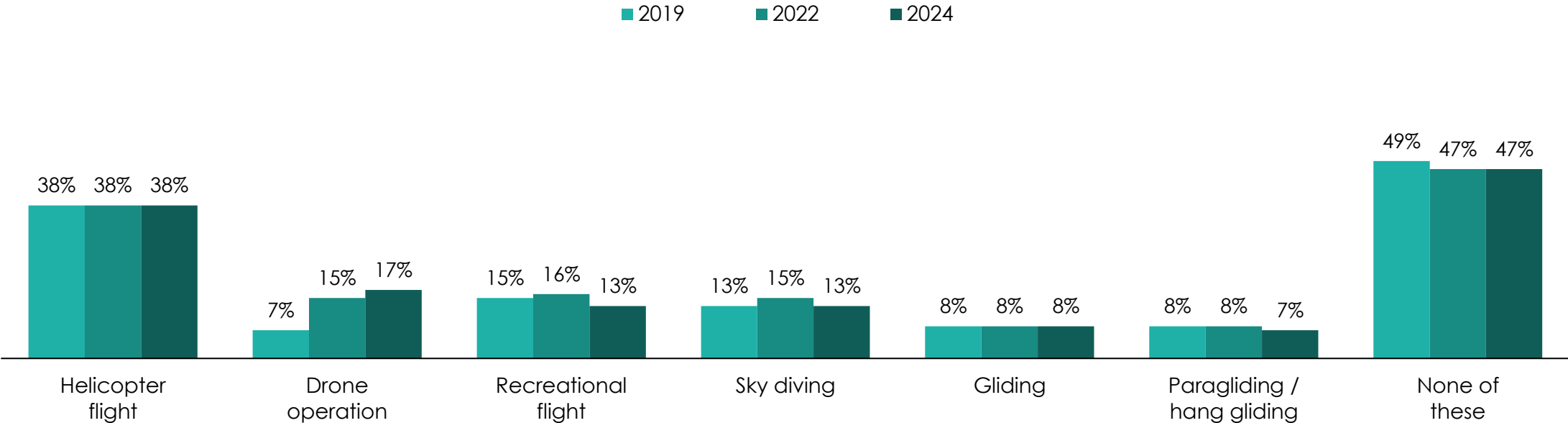
An aerial night photograph of a city, likely Vancouver, showing a dense residential area with many lights from houses and buildings. A prominent road with a light trail runs diagonally across the center. The sky is dark blue, and the overall scene is illuminated by the warm glow of city lights.

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

Uptake of CAA monitored activities has been broadly steady over the past five year.

The one exception is drone operation which continues to rise.

Uptake of other CAA monitored activities



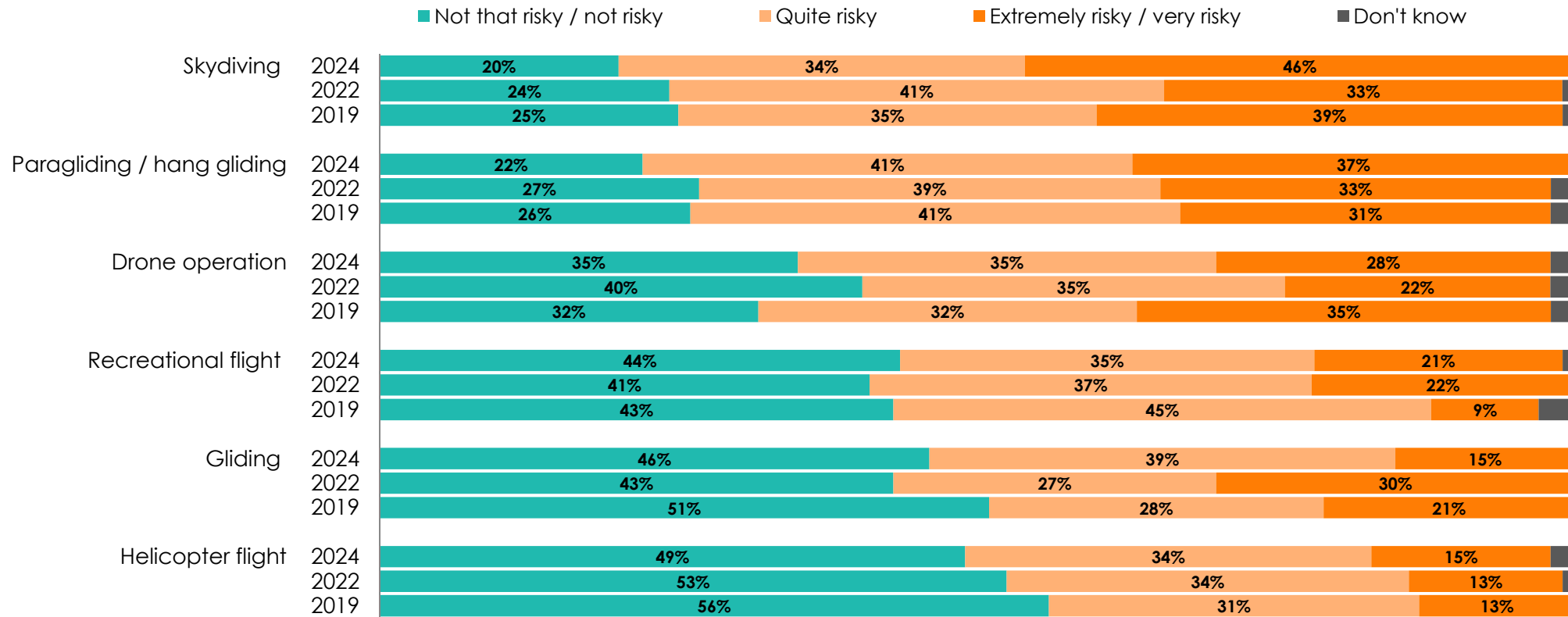
Source: Q11 - The Civil Aviation Authority has responsibility for all aviation activities. The most well-recognised is aviation security at NZ airports. However, there are other aviation activities it is also responsible for. The table below lists some of the aviation activities that CAA is responsible for. Have you ever undertaken any of the following activities in New Zealand?
Base: All NZ resident travellers (2019 n=1,042, 2022 n=1,001, 2024 n=1,004).

Significantly higher than 2022 ▲
 Significantly lower than 2022 ▼

Among those who have done each activity, skydiving and paragliding/hang-gliding are deemed to be the most dangerous.

For these activities, just one in five participants feel they are not risky.

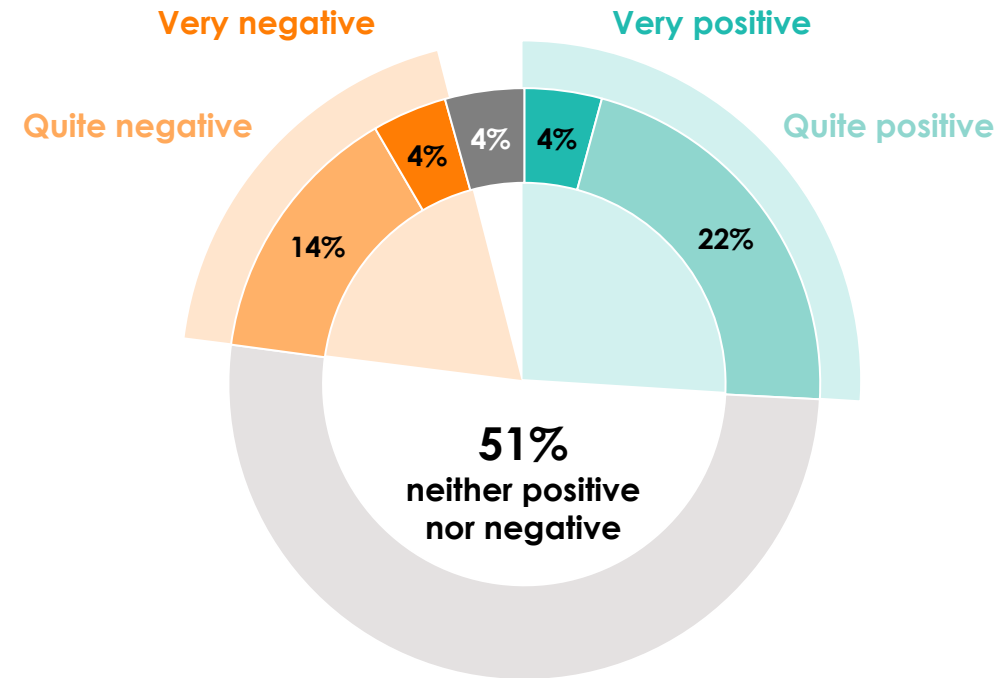
Risk perceptions (among those who have done each activity)



Source: Q13 - Please indicate how risky you think each of these activities is to the personal safety of the people that undertake them? Q13a - Drones, or unmanned aerial vehicles are increasingly used in New Zealand and around the world for both commercial and recreational purposes. Please indicate how risky or not you feel the use of drones is to aviation safety generally.
Base: Those who have undertaken skydiving (2019 n=134, 2022 n=141, 2024 n=134), paragliding / hang gliding (2019 n=79, 2022=77, 2024 n=68), recreational flight (2019 n=157, 2022 n=150, 2024 n=135), drone operation (2019 n=73, 2022 n=130, 2024 n=163), gliding (2019 n=86, 2022 n=80, 2024 n=78), helicopter flight (2019 n=403, 2022 n=394, 2024 n=382).

Half of travellers hold a neutral opinion when it comes to drone use. A quarter (26%) perceive drone use to be positive and one in five (19%) hold negative perceptions.

Perceptions around drones being operated in New Zealand



Source: Q13aa - Generally, do you have a positive or negative view about how drones are being operated in New Zealand?
Base: All NZ resident travellers (2024 n=1,004).
Note: Not asked prior to 2024.

What do people like and dislike about drone usage?

Those who hold negative perceptions tend to focus on privacy concerns and the perceived lack of regulation. Those who are positive generally talk about the usefulness of drones in commercial settings.



1. Privacy concerns

I don't like the invasion of privacy with drones over personal property (have one that flies over my property) or even in public areas (have had them hover over me at beach).

My concerns are more about personal privacy, and the possibility of drones being used by criminals to aid in burglaries, or spy on people in their homes.

2. Concerns around the lack of regulation

Although there are rules on drone use, it seems they are impossible to police or have full oversight of. Like firearms licences, only keep the honest honest. With the ease of purchasing drones and no requirements to be qualified or licenced at the time of purchase, they remain high risk to the safety of flight!!

I would prefer that they are banned and or restricted from most tourist areas, and highly regulated in others. I believe they can be hazardous if operated by non- thinking or careless operators.




1. Commercially useful

[Drones] are a valuable tool in managing stock on farms, over water, line patrols, fire identification - especially when used to avoid putting lives at risk.

New Zealand's iconic scenery—mountains, coastlines, and national parks—has made it a popular location for drone photography and videography. Drones offer a unique perspective of the country's natural beauty, which is a huge draw for tourists.

It's fantastic for educational and marketing promotion but it sparks some security and privacy concerns and needs regulation and transparency.

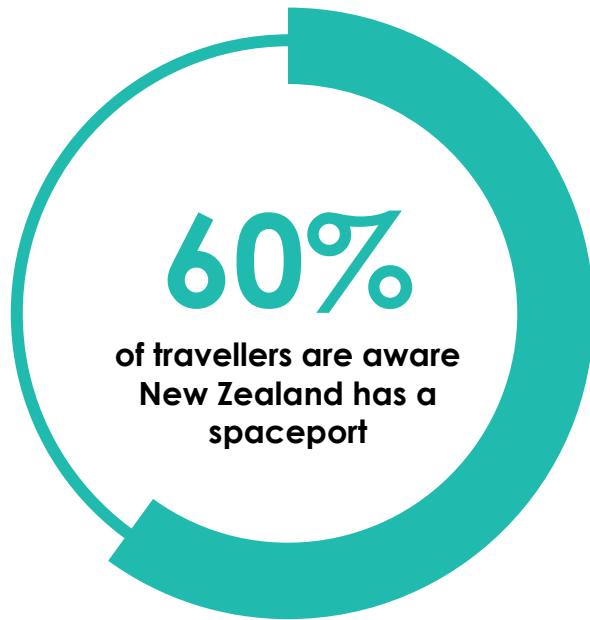
Spaceport knowledge and perceptions

A person stands on a grassy mountain peak in the foreground, looking out over a vast fjord. The water is a deep blue, and the surrounding mountains are dark with patches of white clouds. The sky is a mix of blue and orange, suggesting a sunset or sunrise.

Most domestic travellers are aware of New Zealand's spaceport. Perceptions of risk are relatively low, just 6% feel they are either extremely or very risky.

Those aware of New Zealand's spaceport are more likely than average to believe spaceports are not risky to aviation in New Zealand.

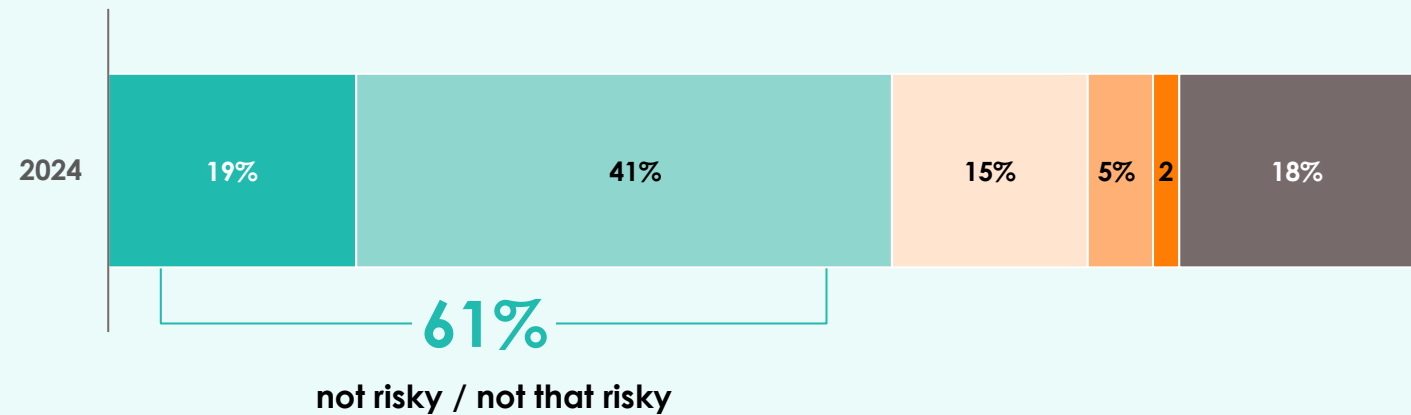
Spaceport awareness and risk perceptions



Source: Q13c - Spaceports are sites dedicated to launching or receiving spacecraft, including satellites. Were you aware that New Zealand has a spaceport on the Māhia Peninsula? The spaceport is called Rocket Lab Launch Complex 1.

Base: All NZ resident travellers (n=1,004).

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



Rises to 74% among those aware of New Zealand's spaceport.

Source: Q13d - How risky or not do you feel having a spaceport in New Zealand is to aviation generally?

Base: All NZ resident travellers (n=1,004).

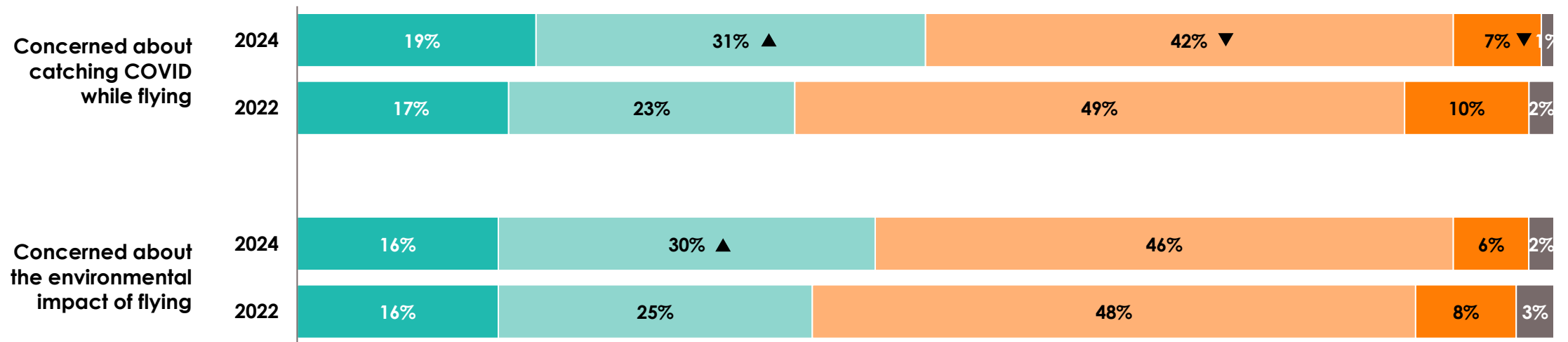
An aerial photograph of a two-lane asphalt road that curves through a dense, lush green forest. The road is the central focus, with a single car visible in the distance. The surrounding trees are thick and vibrant, creating a textured green background. The lighting is natural, suggesting a bright day.

Health and environmental concerns

Compared to 2022, travellers are now less concerned about catching COVID while flying. They are also less concerned about the environmental impact of flying.

Despite this shift in environmental concern, more than half of travellers say they are concerned about the environmental impact of flying.

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



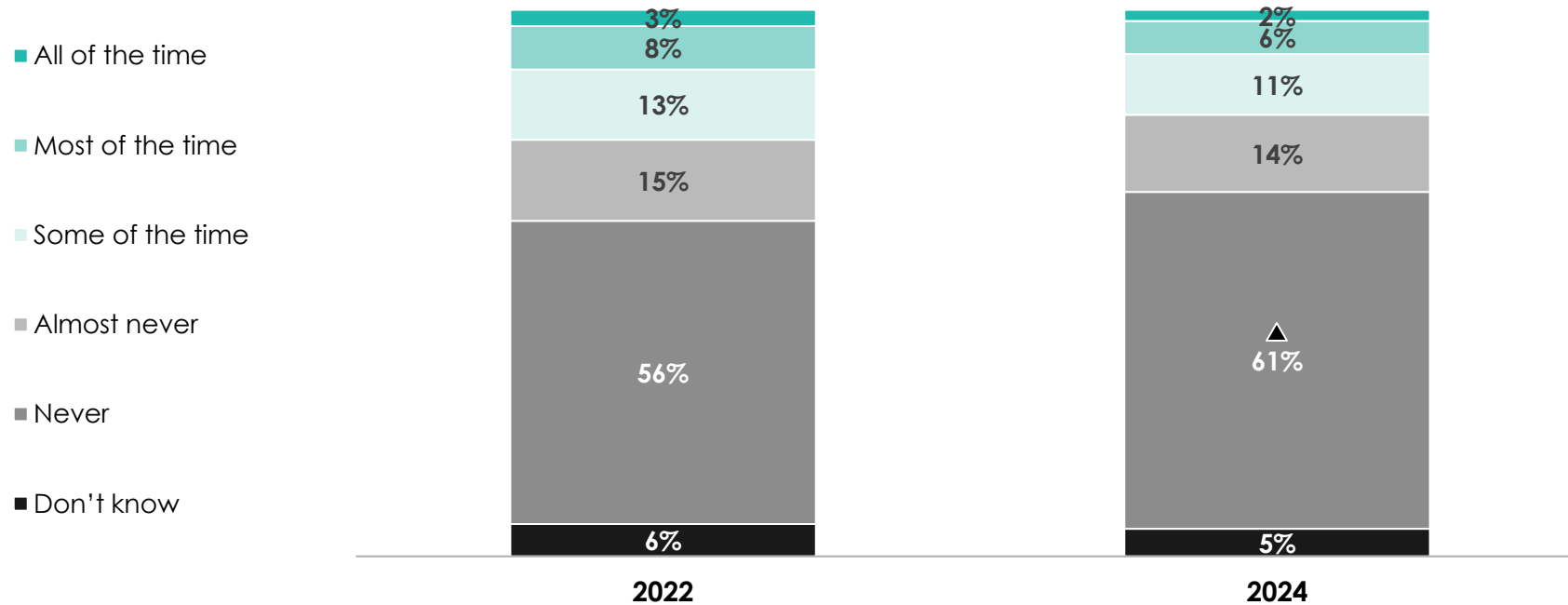
Source: COV3 - Generally, how concerned are you about catching COVID when you fly?
 CAR1 - How concerned are you about the environmental impact of the flights you take?
 Base: All NZ resident travellers (2022 n=1,001, 2024 n=1,004).

Significantly higher than 2022 ▲
 Significantly lower than 2022 ▼

Shifts in carbon credit purchasing are also evident.

Compared to 2022, more travellers now say they 'never' buy carbon credits.

Frequency of carbon credit purchasing



Source: CAR2 - How often, if at all, do you buy carbon credits with your flights (to offset the environmental impact of your flights)?
Base: All NZ resident travellers (2022 n=1,001, 2024 n=1,004).

Significantly higher than 2022 ▲
Significantly lower than 2022 ▼

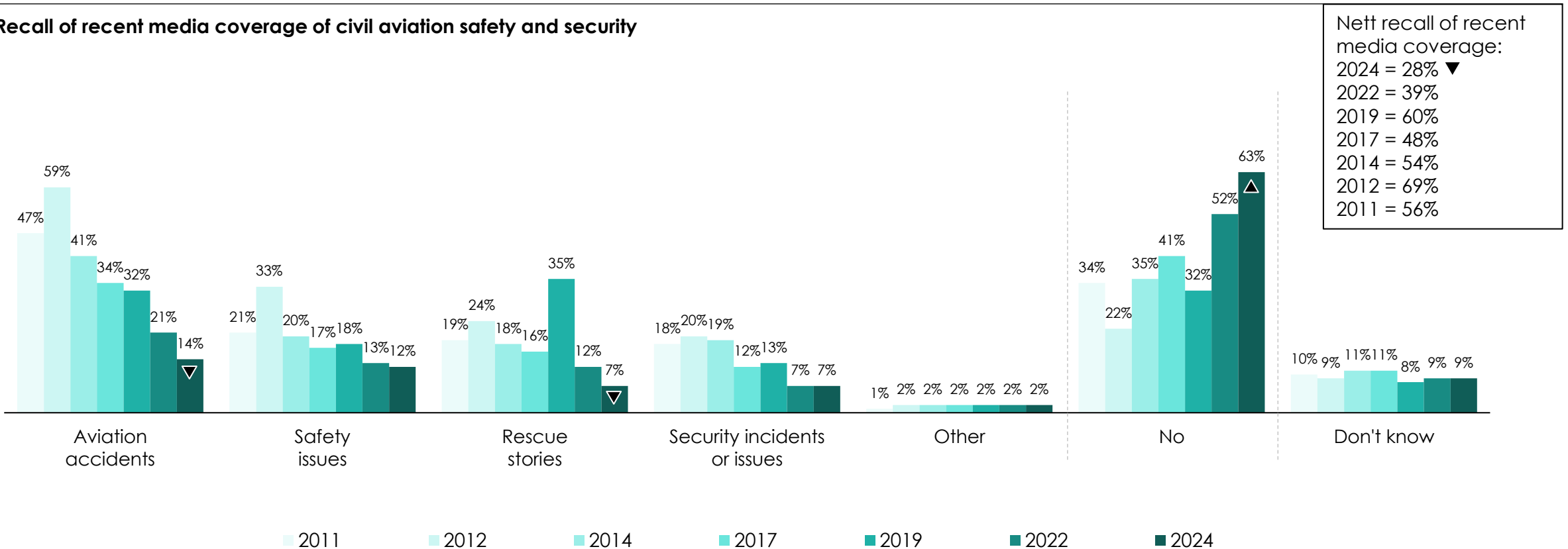
An aerial photograph of a winding river flowing through a dense, green forest. The river's path is dark and contrasts sharply with the vibrant green of the surrounding trees. The perspective is from directly above, showing the meandering course of the water.

Media coverage

Recent media recall is currently very low.

Just over a quarter of travellers say they have seen, read or heard recent information about civil aviation safety and security in New Zealand.

Recall of recent media coverage of civil aviation safety and security



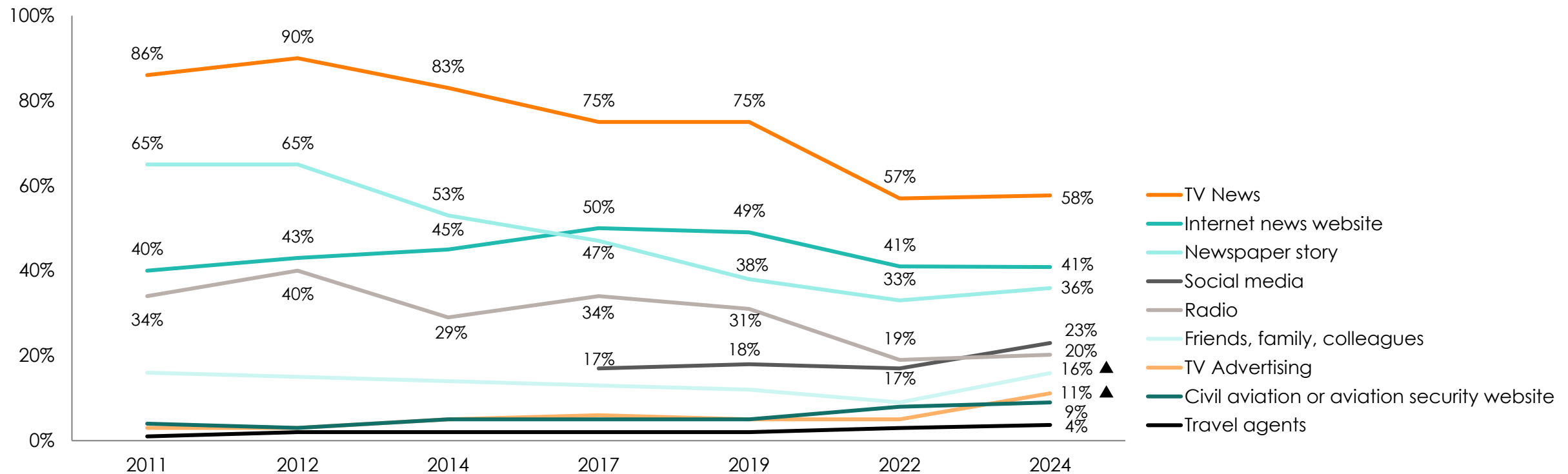
Source: Q14 - Have you seen, read or heard anything recently about civil aviation safety and security in New Zealand – rescue stories, issues or accidents?
 Base: All NZ resident travellers (2011 n=1,036, 2012 n=1,052, 2014 n=1,229, 2017 n=1,000, 2022 n=1,001, 2024 n=1,004).

Significantly higher than 2022 ▲
 Significantly lower than 2022 ▼

Those who do recall encountering information about civil aviation generally cite news media as the source.

News being either on TV, the internet, or in a newspaper.

Source of information about civil aviation and security in New Zealand



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

Base: All NZ resident travellers who have seen, heard or read anything about civil aviation and security recently (2011 n=585, 2012 n=762, 2014 n=687, 2017 n=480, 2019 n=631, 2022 n=391, 2024 n=277).

Significantly higher than 2022 ▲
Significantly lower than 2022 ▼

2. International traveller survey results

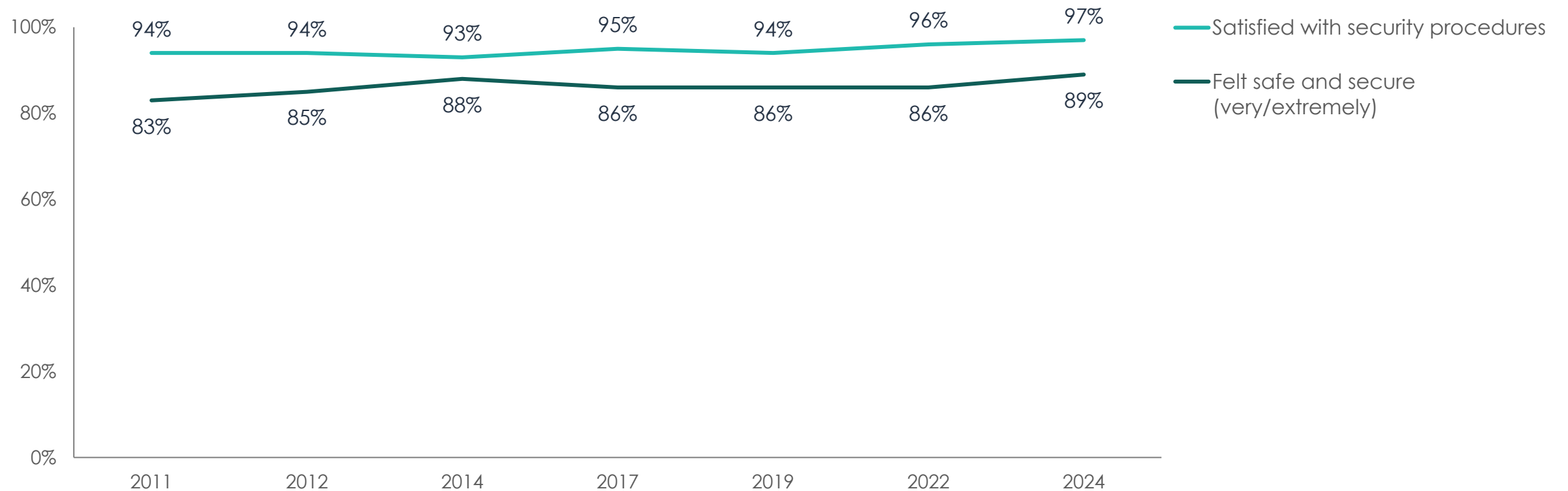
An aerial photograph of a coastline. The top right shows turquoise ocean water with white foam from waves crashing onto a sandy beach. The beach is a wide, light-colored strip. To the left of the beach is a dark, vegetated area, possibly a forest or scrubland. The overall scene is captured from a high angle, looking down at the landscape.

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

International travellers consistently feel satisfied with security procedures and feel safe and secure with aviation security.

Both measures are now the highest they have been since the research began in 2011.

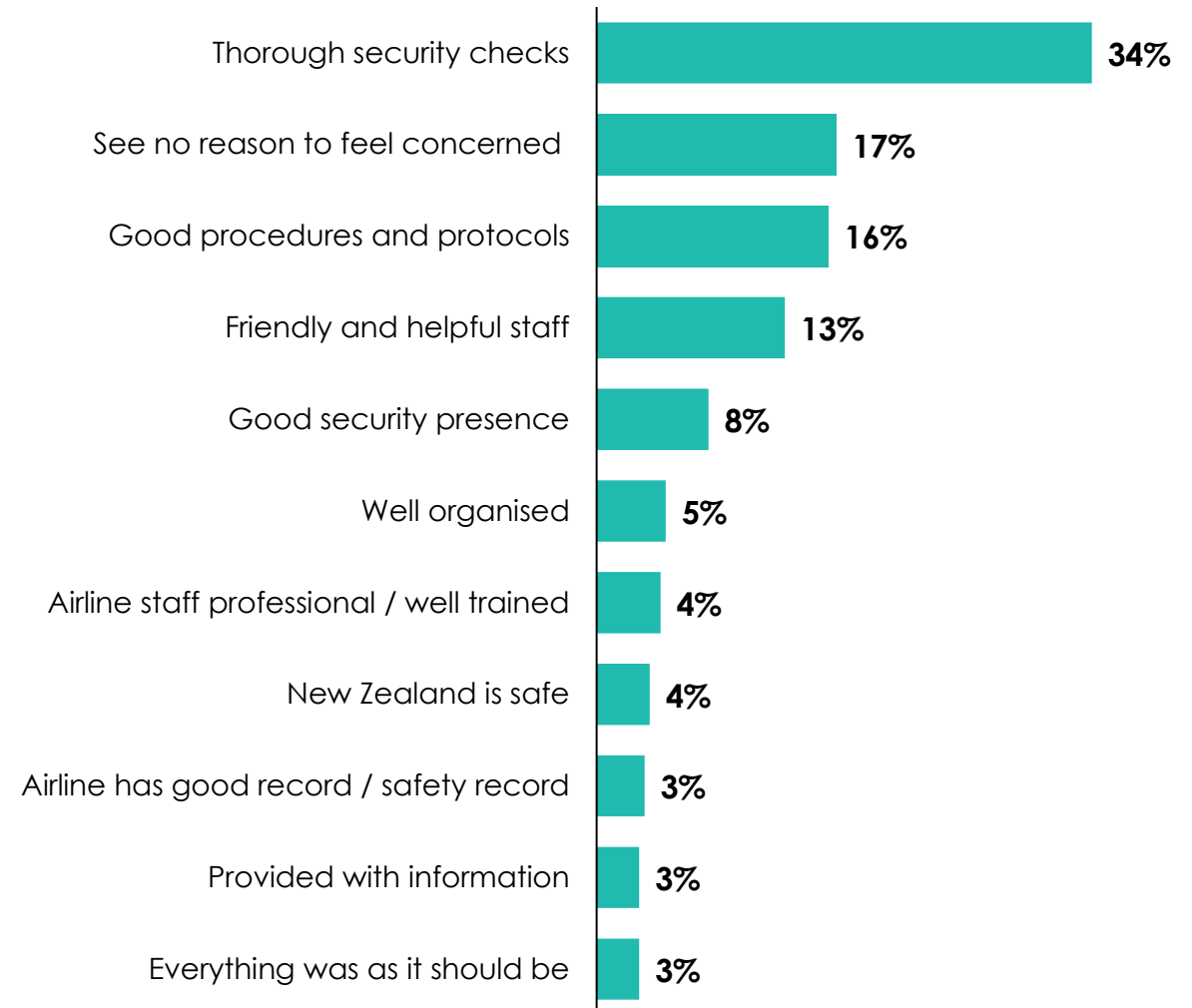
Satisfaction with security procedures and feelings of safety and security



Source: Q4 - How satisfied are you that the security measures you've experienced at New Zealand airports will keep you safe and secure for the duration of a flight?
Q6 - Overall how safe and secure do you feel travelling either on domestic flights in New Zealand or international flights departing from New Zealand?

Base: All international travellers (2011 n=310, 2012 n=325, 2014 n=327, 2017 n=329, 2019 n=302, 2022 n=314, 2024 n=305).

Those who felt safe and secure generally attributed it to the thorough security checks.



Source: Q7 - For what reasons do you feel that way?

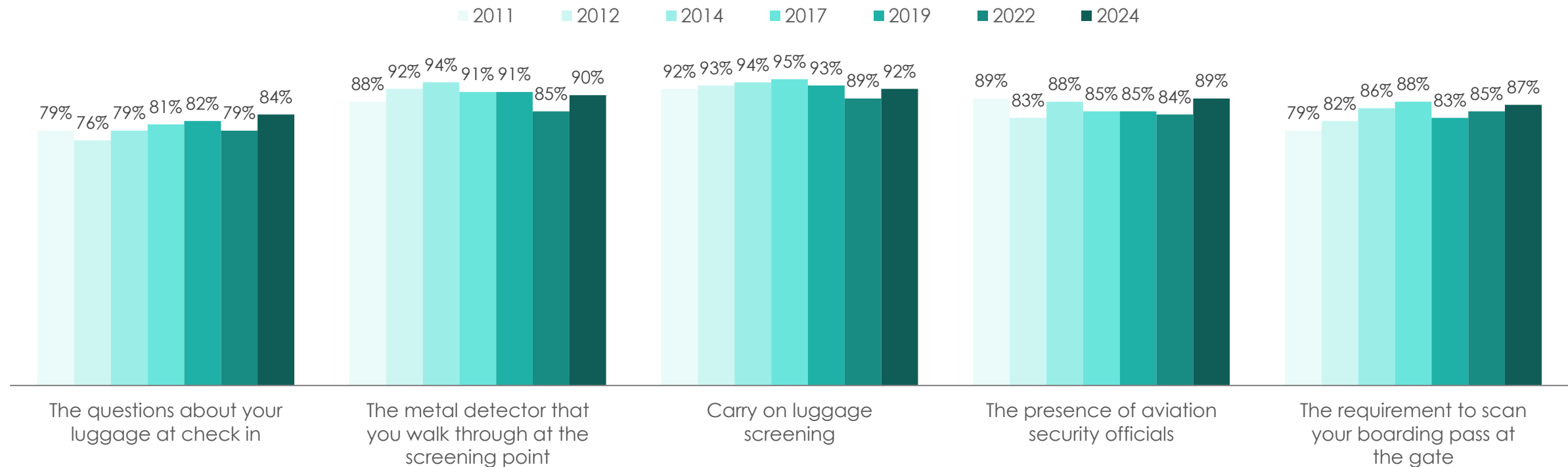
Base: Those who felt safe and secure while travelling (n= 272)

All aspects of aviation security are seen as very important to international travellers.

Aspects deemed to be particularly important are carry-on luggage screening, metal detectors and the presence of aviation officials.

Importance of individual security procedures

% very / extremely important



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

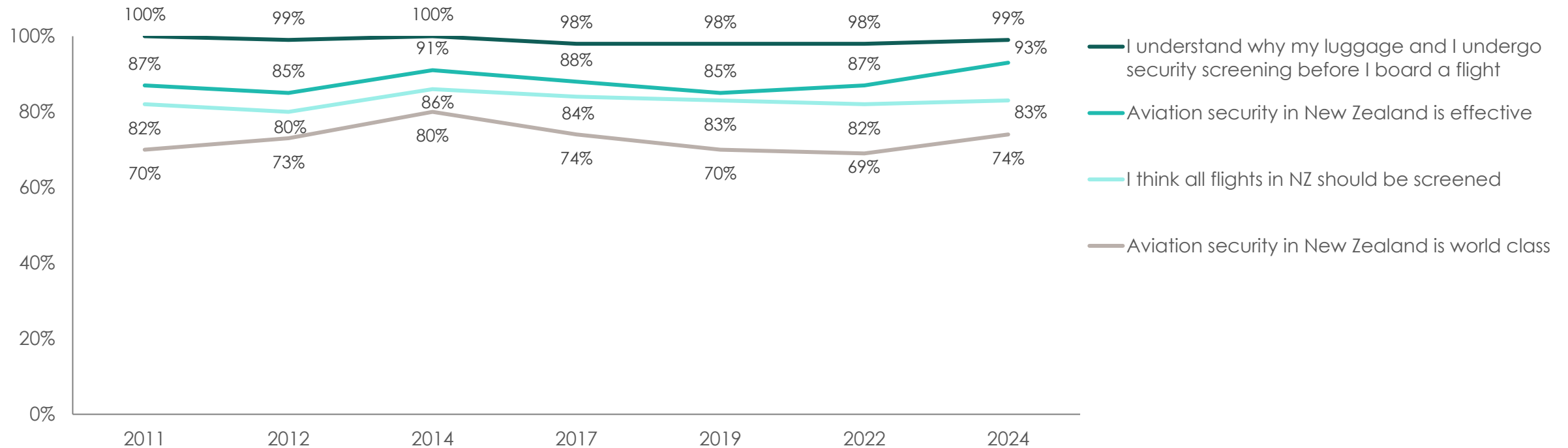
Base: All international travellers (2011 n=310, 2012 n=325, 2014 n=327, 2017 n=329, 2019 n=302, 2022 n=314, 2024 n=305).

Almost all international travellers understand why they and their luggage need to be screened and feel New Zealand aviation security is effective.

Three in four feel aviation security in New Zealand is world class.

Perceptions around security screening

% agree / strongly agree



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

Base: All international travellers (2011 n=310, 2012 n=325, 2014 n=327, 2017 n=329, 2019 n=302, 2022 n=314, 2024 n=305).

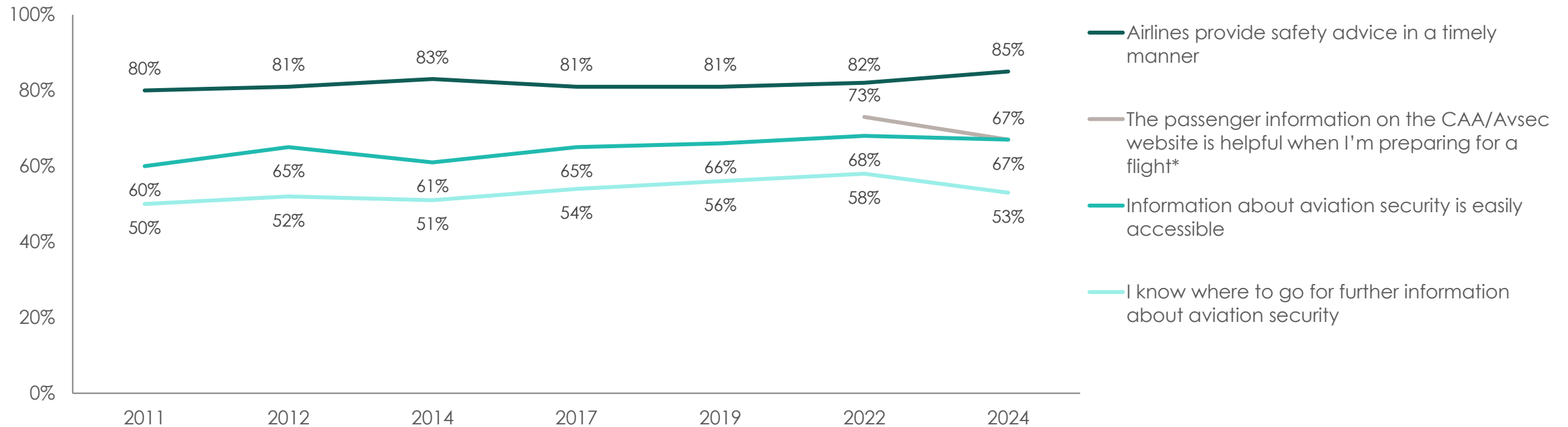
Significantly higher than 2022 ▲
Significantly lower than 2022 ▼

Most international travellers (85%) feel airlines provide safety advice in a timely manner.

Two thirds agree information on the CAA/AVSEC website is helpful and that information is easily accessible. Half say that they know where to go for further information.

Perceptions about information delivery and accessibility

% agree / strongly agree



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

Base: All international travellers (2011 n=310, 2012 n=325, 2014 n=327, 2017 n=329, 2019 n=302, 2022 n=314, 2024 n=305).

Notes: * Statement asked for the first time in 2022. * Don't knows removed from base.

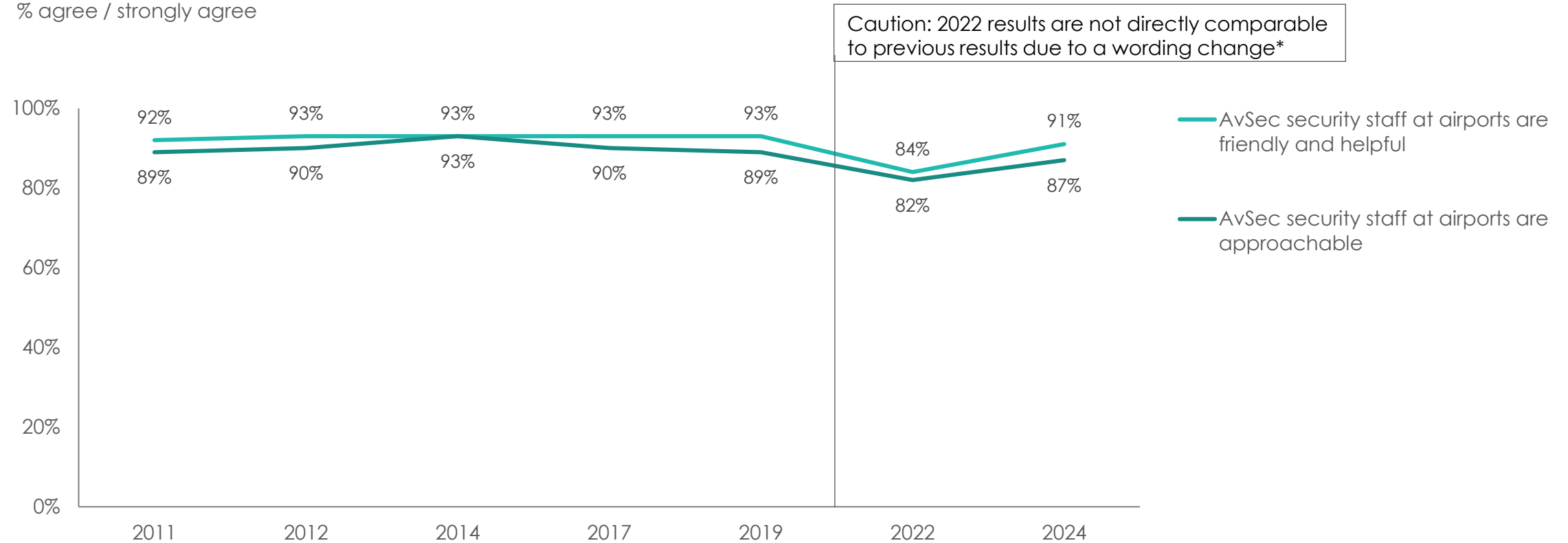
Significantly higher than 2022 ▲
Significantly lower than 2022 ▼

Perceptions of AVSEC staff have improved between 2022 and 2024.

This is particularly true for AVSEC staff being friendly and helpful.

Perceptions of AVSEC staff

% agree / strongly agree



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

Base: All international travellers (2011 n=310, 2012 n=325, 2014 n=327, 2017 n=329, 2019 n=302, 2022 n=314, 2024 n=305).

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

Significantly higher than 2022 ▲
Significantly lower than 2022 ▼

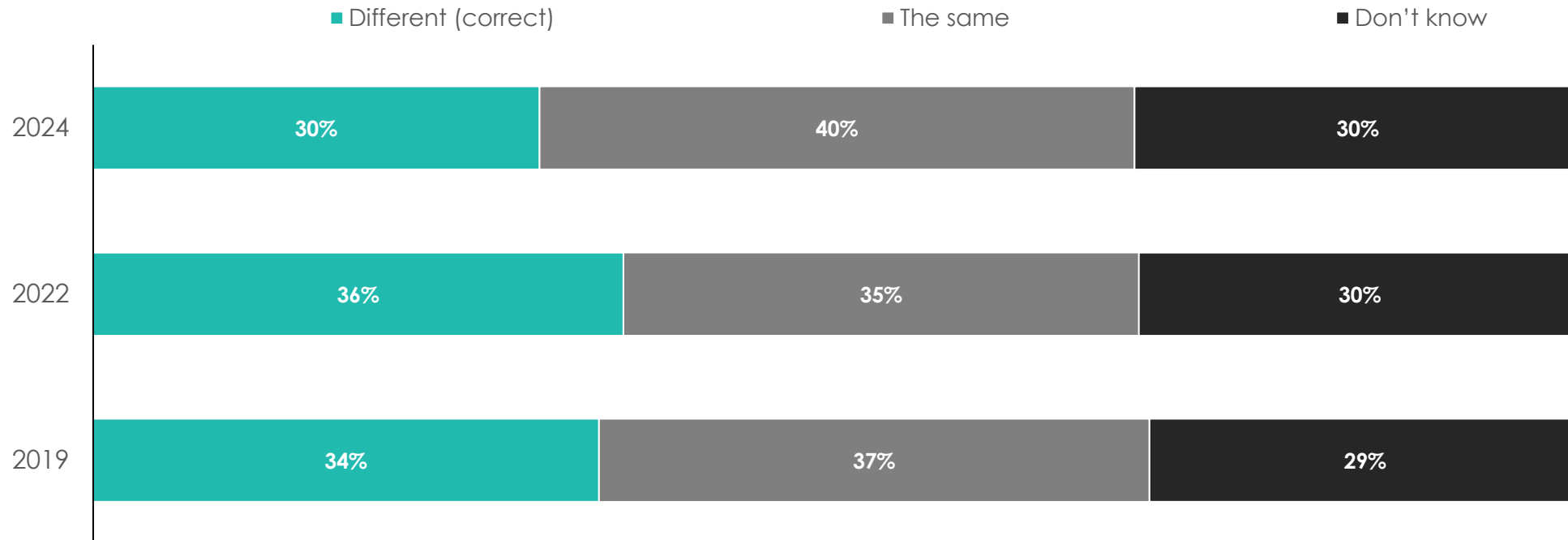


Knowledge around aviation safety and security

One third of international travellers know that luggage restrictions between international and domestic flights are different.

Scope of knowledge seems to have declined slightly (although not significantly) between 2022 and 2024.

Knowledge of rule differences



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

Base: All NZ resident travellers (2019 n=302, 2022 n=314, 2024 n=305).

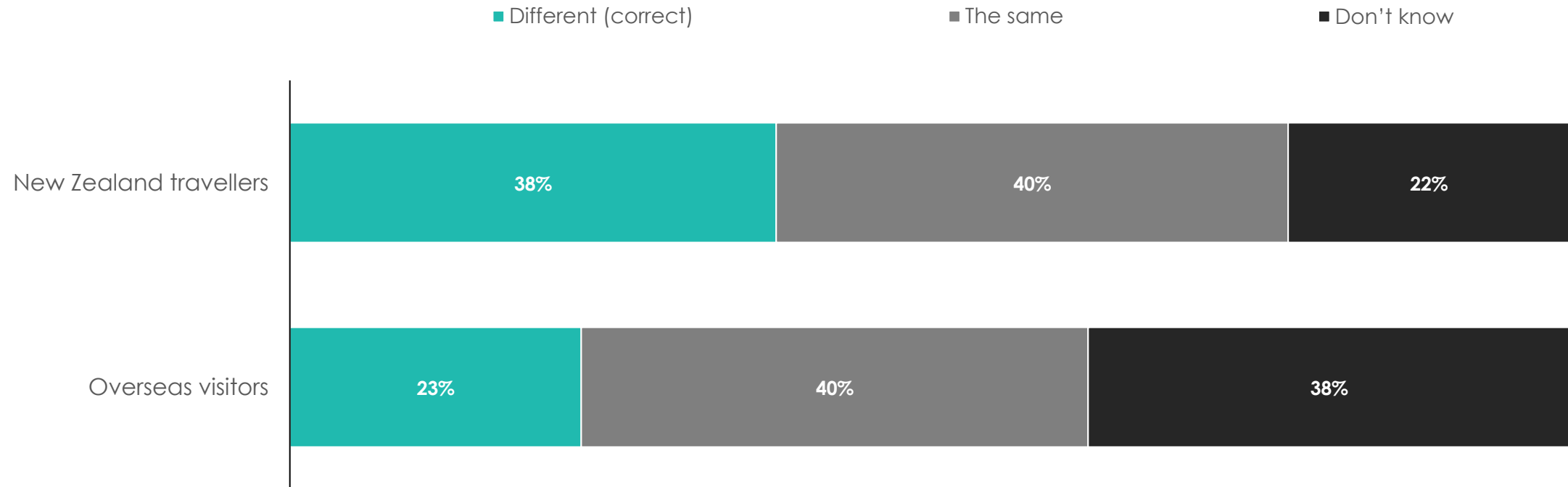
Notes: Not asked prior to 2019.



Knowledge varies by traveller type.

New Zealand travellers have much greater knowledge of the differing rules than their overseas counterparts.

Knowledge of rule differences



Source: Q16 - Are the New Zealand restrictions on items in luggage the same or different for domestic and international flights?
Base: New Zealand travellers (2024 n=141), Overseas visitors (n=164).
Notes: Not asked prior to 2019.

Since 2022, there has been a rise in detailed knowledge around what can be taken as carry on and what can be checked.

Knowledge improvements are particularly evident for checked luggage.

Knowledge of specific rules	International flights									
		Carry on					Checked in			
		2022		2024			2022		2024	
	✓	Okay	Not okay	Okay	Not okay	✓	Okay	Not okay	Okay	Not okay
AirPods / Earbuds	✓	95%		97%		✓	88%		77%▼	
Laptop (x1)	✓	96%		98%		✓	63%		65%	
Perfume (75ml)	✓	74%		82%		✓	77%		93%▲	
Prescription medicine	✓	93%		97%		✓	85%		90%	
Toothpaste (80ml)	✓	74%		83%▲		✓	79%		93%▲	
Bottle of water (250ml)	✗		47%		53%	✓	52%		68%▲	
Butter (500g)	✗		72%		69%	✓	26%		47%▲	
Can of Coke (330ml)	✗		55%		59%	✓	31%		52%▲	
Gin (750ml) in a Security Tamper Evidence bag	✗		26%		34%	✓	52%		72%▲	
Manuka Honey (500g)	✗		51%		55%	✓	49%		71%▲	
Perfume (125ml)	✗		56%		61%	✓	65%		86%▲	
Snow Globes	✗		46%		48%	✓	37%		62%▲	
Talcum Powder (400ml)	✗		54%		51%	✓	46%		71%▲	
e-cigarette / Vape (x1)	✓	24%		30%		✗		48%		57%
Lighter (x1)	✓	18%		20%		✗		71%		65%
Loose batteries (e.g., AA, AAA, or 9v)	✓	34%		42%		✗		55%		58%
Power Bank (x1) (a portable battery)	✓	62%		69%		✗		60%		60%
90Wh power tool battery (18 volt, 5.0Ah battery)	✓	14%		22%		✗		63%		65%
Power Drill	✗		86%		86%	✓	23%		42%▲	
Scissors with 10cm blade	✗		91%		93%	✓	38%		64%▲	
Swiss Army Knife with 7cm blade	✗		92%		91%	✓	36%		51%▲	
Fire-works	✗		94%		99%▲	✗		89%		96%▲
LPG Bottle	✗		89%		89%	✗		84%		83%

✓ Allowed in that type of bag

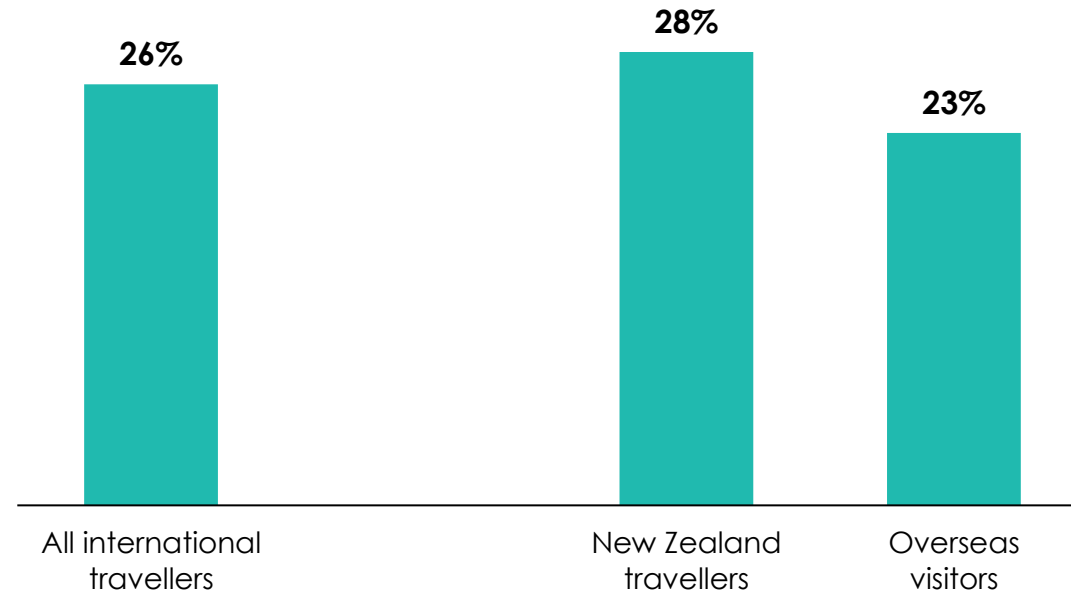
✗ Not allowed in that type of bag

Particularly low awareness

Source: Q24. Imagine you were about to go on [insert a domestic flight within/ insert an international flight from] New Zealand. Q24a. Imagining again that you were about to go on [insert a domestic flight within/ insert an international flight from] New Zealand. Which of these items are okay to take in your checked-in bags and which are not okay?
 Base: NZ resident travellers who were answered about domestic flights (n≈260), NZ resident travellers who were answered about international flights (n≈260).


More than a quarter of international travellers have visited the CAA/Avsec website. Usage is slightly (but not significantly higher) among New Zealand travellers when compared to overseas visitors.

Website utilisation



Source: Q25a – In the last 12 months have you visited the CAA/Avsec website to check what you can and can't put in your carry-on and checked luggage?

Base: All international travellers (2024 n= 305), New Zealand travellers (n=141), Overseas visitors (n=164).

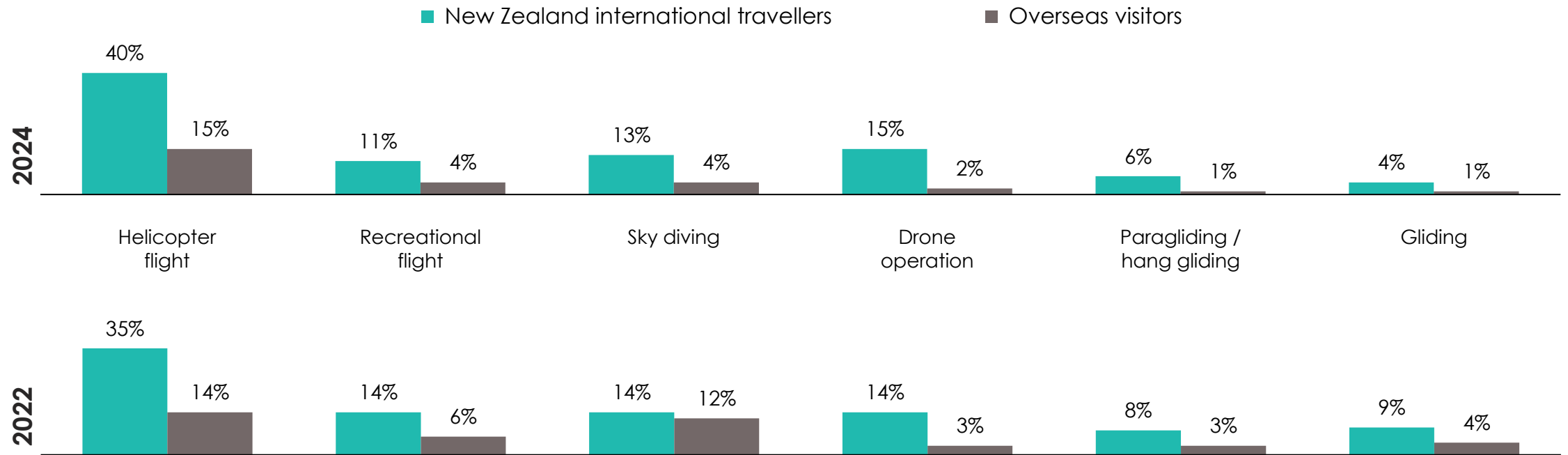
An aerial night photograph of a city, likely Vancouver, showing a dense residential area with many lights from houses and buildings. A prominent road with a light trail runs diagonally across the scene. The sky is dark blue, and the overall atmosphere is illuminated by the warm glow of city lights.

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

Participation in CAA monitored activities remains broadly stable over time.

Overseas visitors continue to have higher participation rates across all activities when compared to New Zealand international travellers.

Uptake of other CAA monitored activities



Source: Q11_NEW - The Civil Aviation Authority has responsibility for all aviation activities. The most well-recognised is aviation security at NZ airports. However, there are other aviation activities. It is also responsible for. The table below lists some of the aviation activities that CAA is responsible for. Have you ever undertaken any of the following activities in New Zealand?

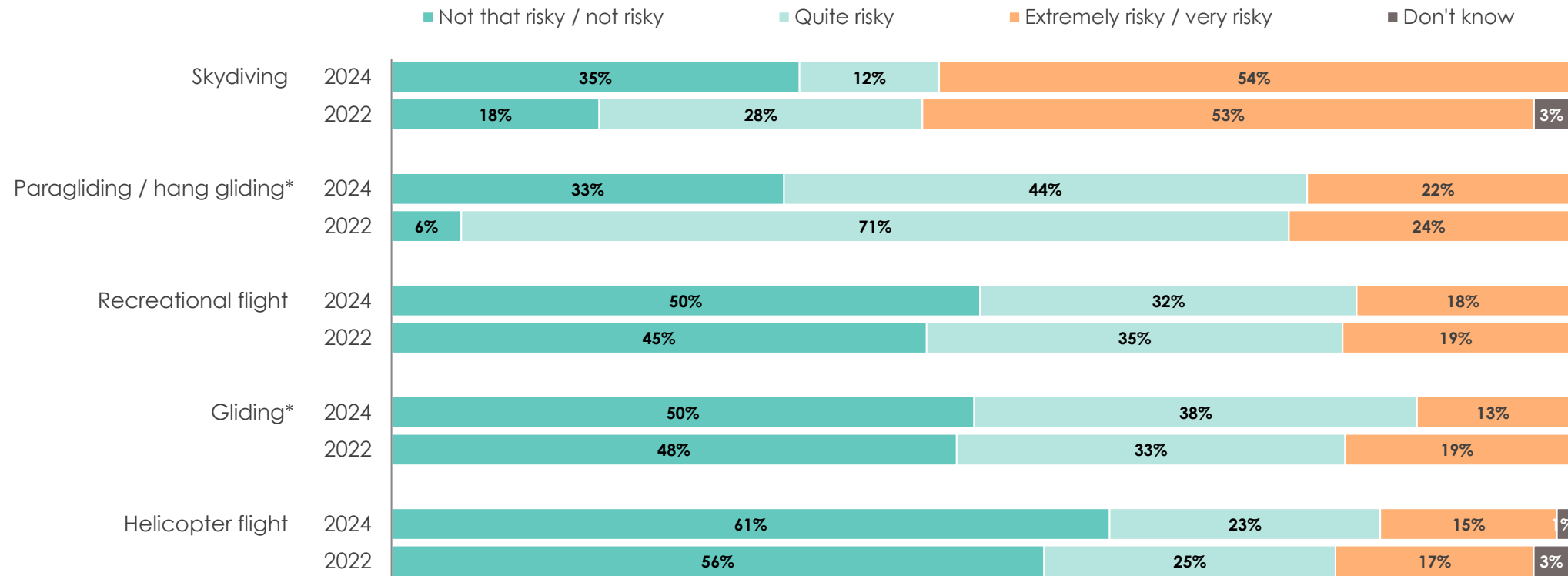
Base: All New Zealand international travellers (2022 n=159, 2024 n=164), overseas visitors (2022 n= 155, 2024 n=141).

Significantly higher than 2022 ▲
Significantly lower than 2022 ▼

Of the CAA monitored activities asked about skydiving is perceived, by its participants, as the riskiest.

Nearly half of whom feel it is either very or extremely risky.

Risk perceptions (among those who have done each activity)



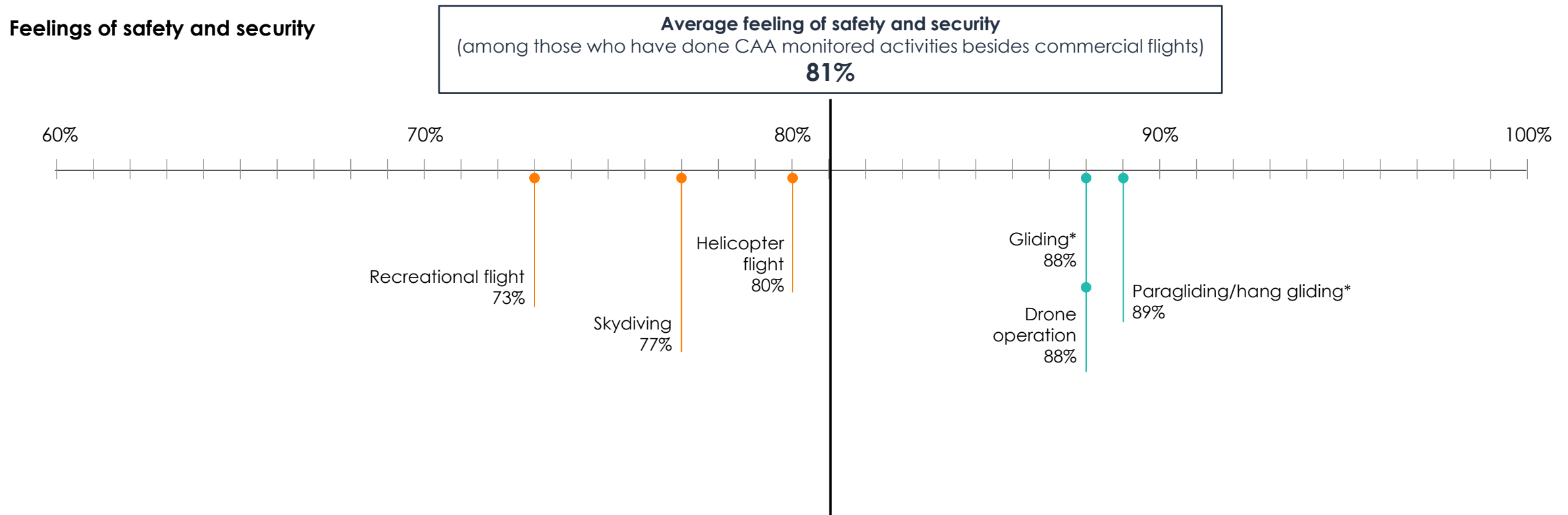
Source: Q11A - Please indicate how risky you think each of these activities is to the personal safety of the people that undertake them?

Base: Those who have undertaken paragliding / hang gliding (2022=17, 2024 n=9), skydiving (2022 n=40, 2024 n=26), recreational flight (2022 n=31, 2024 n=22), gliding (2022 n=21, 2024 n=8), helicopter flight (2022 n=77, 2024 n=80)

Note: * caution very small base size, results are indicative only.

Overall feelings of aviation safety and security vary depending on participation in CAA monitored activities.

Those who have been on a recreational flight or who have been skydiving are particularly likely to have lower than average overall feelings of aviation safety and security.



Source: 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 in the last question)?

Base: All international travellers who have not done CAA monitored activities other than commercial flights (2011 n=253, 2012 n=240, 2014 n=245, 2017 n=249, 2019 n=201, 2022 n=199, 2024 n=194), international travellers who have done CAA monitored activities besides commercial flights (2011 n=57, 2012 n=85, 2014 n=81, 2017 n=80, 2019 n=98, 2022 n=115, 2024 n=111).

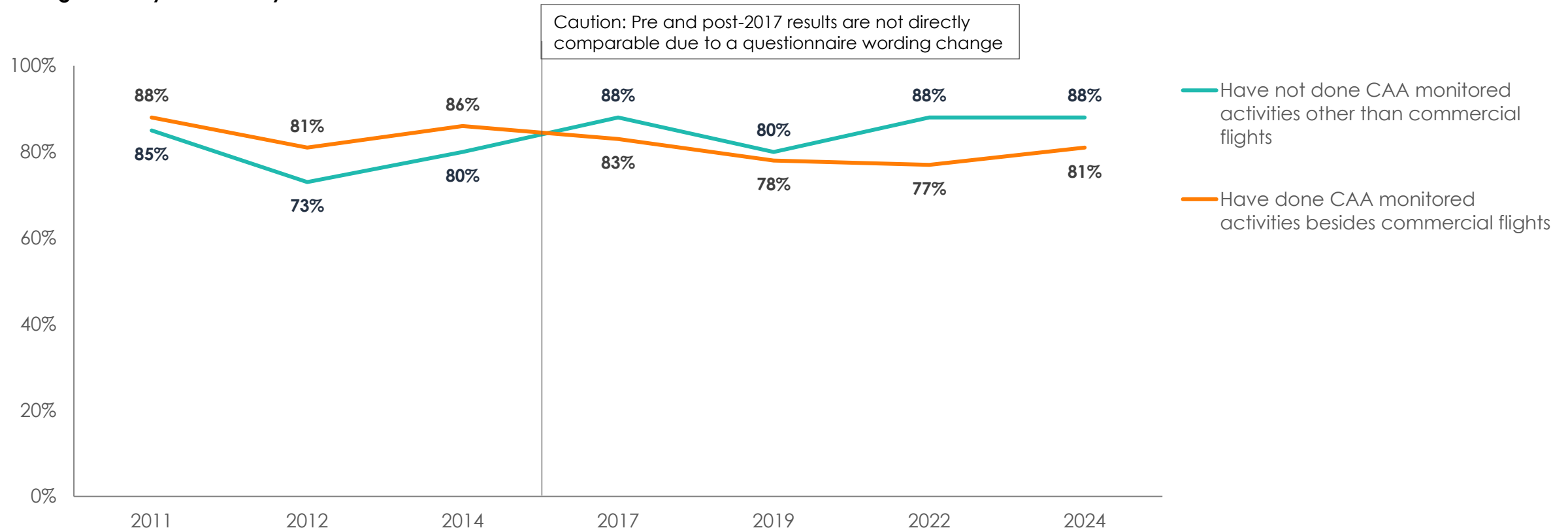
Note: * caution small base size.

Significantly higher than 2022 ▲
Significantly lower than 2022 ▼

Travellers who have only been on commercial flights (who have not participated in other CAA monitored activities) are most likely to feel safe and secure in an aviation setting.

Feelings of safety and security dip among those who have participated in at least one other CAA monitored activity.

Feelings of safety and security



Source: 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 in the last question)?
Base: All international travellers who have not done CAA monitored activities other than commercial flights (2011 n=253, 2012 n=240, 2014 n=245, 2017 n=249, 2019 n=201, 2022 n=199, 2024 n=194), international travellers who have done CAA monitored activities besides commercial flights (2011 n=57, 2012 n=85, 2014 n=81, 2017 n=80, 2019 n=98, 2022 n=115, 2024 n=111).

Appendix

A person is standing on the peak of a grassy mountain in the foreground, looking out over a vast, winding lake. The lake is surrounded by dark, silhouetted mountains. The sky is a mix of deep blue and orange, suggesting a sunset or sunrise. The overall mood is serene and expansive.

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

1. Online survey of travellers who live in New Zealand

- Online survey of 1,004 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 online panels.
- Average time to complete survey was approximately 10 minutes.
- All interviews were completed from 1 and 14 November 2024.
- Maximum margin of error for the total sample of 1,004 interviews is +/- 3.1% at the 95% confidence level.

2. Intercept survey of international air travellers at airports

- Intercept survey of 305 international travellers at departure lounges at Auckland International Airport.
- Of the 305 international travellers surveyed, 141 had mainly lived in New Zealand for the last 12 months and 164 had mainly lived overseas for the last 12 months, with Australia being the most common country of residence besides New Zealand.
- Average interview length was approximately 8 minutes.
- All interviews were completed from 1 and 14 November 2024.
- Maximum margin of error for the total sample of 305 interviews is +/- 5.6% at the 95% confidence level.



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