



Australian Government
Civil Aviation Safety Authority

Public Attitudes to Aviation Safety

Prepared for Civil Aviation Safety Authority, September 2014



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1

Executive Summary



Executive Summary

- The Civil Aviation Safety Authority (CASA) has a strong reputation among the general public with 83% believing CASA is doing a great, good or reasonable job and only 3% scoring CASA as doing a poor or very poor job.
- However, there is some room for improvement with 27% rating CASA's performance as only reasonable and 14% being unsure of its performance, suggesting there may be a lack of awareness of CASA's role among a segment of the community.
- The public generally believe Australia has a good safety record and attribute the low number of aircraft incidents to CASA's efforts and believe there are good regulations in place.
- However a minority are blaming general aviation incidents on lack of proper maintenance and safety checks.
- Public confidence about the safety of travelling on commercial flights in Australia is high with 75% very or completely confident and just 3% not confident.
- The majority of Australians (80%) think travelling on a commercial flight is just as safe or more safe than five years ago and 60% that commercial airline flights are safer in Australian than the US or Europe.



Executive Summary Cont'd...

- There is a general impression among the public that aviation safety is improving due to developments in technology and stricter safety regulations.
- However, concerns were expressed by a minority about the impact of commercial pressures to cut costs on the quality of maintenance, heightened awareness of air disasters following the Malaysian Airlines incidents and security issues.
- The Australian public is less confident about the safety of travelling on smaller charter and private aircraft, with only 20% very or completely confident, mainly based on the belief that smaller aircraft are less safe and awareness of general aviation incidents and fatalities via news reports.
- However, a minority have raised concerns about maintenance regimes, safety checks and insufficient regulation across both charter and private aircraft operators.
- Overall there is strong support for CASA's role in supervising the safety of operations of commercial airlines and charter and private aircraft operators with a sizeable proportion of the public in favour of increasing the level of supervision across all three areas of aviation.

2

Background & Research Objectives



Background and Objectives

- CASA is seeking to measure public perceptions of how well it is fulfilling its role in managing the safety regulation of civil air operations in Australian territory.
- Previous surveys were conducted in 2000, 2002, 2005 and 2007.
- While high level comparisons can be made between the current and past surveys, direct comparisons are not possible due to a change in interviewing methodology from telephone to online in 2014.
- The key objectives for the 2014 survey were to measure public perceptions of the:
 - Performance of the Civil Aviation Safety Authority (CASA);
 - Level of air safety in Australia;
 - The level of air safety in Australia compared to similar nations (US, UK); and
 - Awareness and perceptions of CASA's handling of the recent changes to use of electronic devices on aircraft.

3

Methodology



Methodology

- This study was conducted online among a nationally representative sample of Australians aged 18 years and older.
- The sample was 1,019 respondents distributed throughout Australia in capital city and non capital city areas.
- Galaxy Research designed the questionnaire, a copy of which has been included in this report.
- The questionnaire was transferred into Web Survey Creator in order to be hosted online. For each question the respondent had to click on the response which represented their answer.
- Fieldwork commenced on Tuesday 2 September and was completed on Thursday 4 September, 2014.
- Following the completion of interviewing, the data was weighted by age, gender and region to reflect the latest ABS population estimates.

4

Main Findings

4.1

Public perceptions
of how well CASA
is doing its job

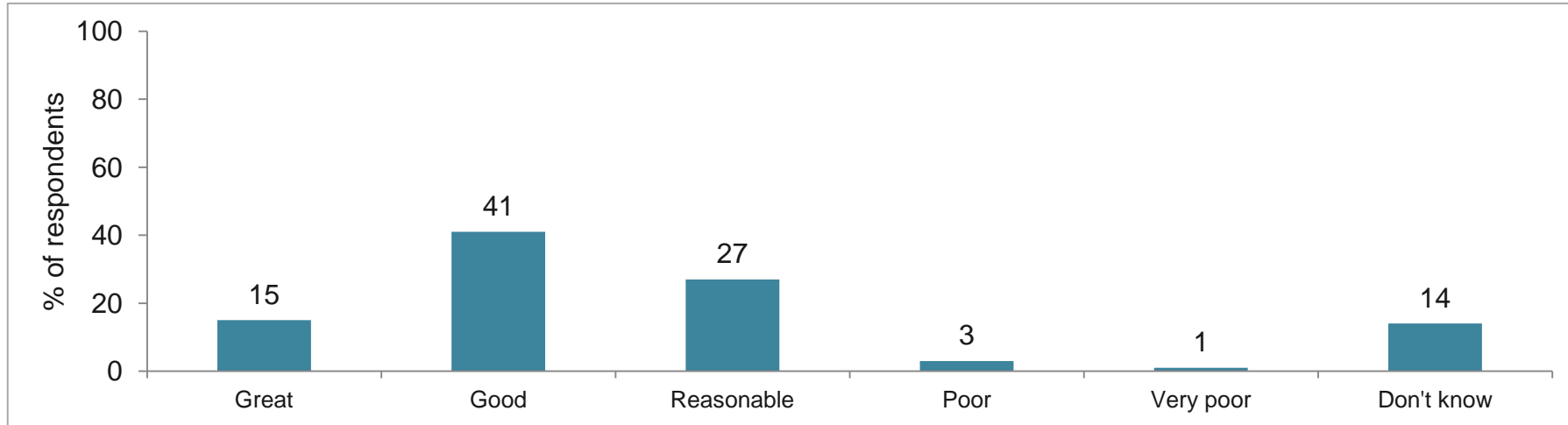


Summary: Public perceptions of how well CASA is doing its job

- Perceptions of the Civil Aviation Safety Authority (CASA) are positive with 56% believing CASA is doing a good or great job and a further 27% a reasonable job. Just 4% believe CASA is doing a poor or very poor job. Older Australians (62%) and recent flyers (60%) are most likely to think CASA is doing a good or great job.
- Positive views of CASA are based on perceptions that Australian airlines are safe as there are few incidents (37%), that CASA is responsible for good safety records (19%) and that there are good regulations in place (11%).
- Among the small minority who believe CASA is doing a poor job, the main reasons given include that private aircraft accidents have occurred (22%), poor security screening at airports (18%) and lack of adequate maintenance checks (16%).

Public perceptions of how well CASA is doing its job

Over half of Australians (56%) believe that CASA is doing a good or great job in regulating civil aviation safety, while a further 27% believe they are doing a reasonable job and just 4% a poor job. Older Australians (62%) and those who have flown in the last 12 months (60%) are more likely to believe CASA is doing a good or great job.



How well is CASA doing its job?	Total (n=1,019)	Men (n=504)	Women (n=515)	Gen Y (n=312)	Gen X (n=279)	Baby Boomers (n=241)	Tradition -alists (n=187)	Flown last 12 months (n=507)	Flown 1-2 years ago (n=163)	Flown 3+ years ago (n=277)	Never flown on commercial flight (n=72)
CASA is doing a great job	15	16	14	13	16	14	17	18	12	12	13
CASA is doing a good job	41	41	41	41	37	40	45	42	43	43	18
CASA doing a reasonable job	27	28	25	26	28	28	26	25	32	27	24
CASA is doing a poor job	3	3	3	2	2	5	3	3	2	3	5
CASA is doing a very poor job	1	1	1	0	2	1	-	1	0	1	2
Don't know	14	11	16	18	15	11	9	11	10	14	38

Base: Total n=1,019

Q. In general, how well do you think the Civil Aviation Safety Authority (CASA) is doing its job?

Reasons for why CASA is doing a reasonable/ good/ great job

Among those who think CASA is doing a reasonable, good or great job, the main reasons given include that Australian airlines are safe and few aircraft incidents are reported (37%), that CASA is responsible for the good safety record achieved (19%) and that regulations are good (11%).

	Total (n=840)	Men (n=430)	Women (n=410)	Gen Y (n=248)	Gen X (n=226)	Baby Boomers (n=201)	Tradition- alists (n=165)
Australian airlines are safe/ few aircraft incidents	37	37	37	37	39	36	35
Good safety records due to CASA/ CASA does a good job	19	18	19	16	20	21	19
Good regulations	11	10	13	9	10	15	13
No fatal accidents/ major incidents	8	6	10	11	8	5	6
Proactive role of CASA/ CASA investigates any incidents/ accidents	4	3	4	1	6	2	5
CASA lacks staff/ poorly funded	3	3	3	1	3	3	7
Aircrafts maintained well	2	2	2	1	2	1	4
Pilots trained	1	2	1	1	1	1	2
Still a lot of crashes/ incidents	1	2	0	1	0	1	1
Other	4	3	4	3	3	5	4
None / Don't know	15	18	13	23	13	12	9

Base: Think CASA is doing a reasonable/ good/ great job n=840

Q. What is the main reason why you think the Civil Aviation Safety Authority (CASA) is doing a <reasonable/ good/ great> job?

Reasons for why CASA is doing a poor/ very poor job

In contrast, among those who think CASA is doing a poor or very poor job, 22% point to private aircraft accidents and crashes, 18% think there is a lack of security and screening of people and 16% believe that there are maintenance issues with some aircraft because planes are not being checked.

	Total (n=38)	Men (n=19)	Women (n=19)
Private aircraft accidents/ crashes (trainees flying)	22	10	35
Lack of checking/ screening people/ security	18	18	18
Maintenance issues (planes not checked)	16	18	14
CASA decision-making insular/ jobs for the boys	15	24	6
Safety issues	5	11	-
Outsourcing of maintenance jobs	4	-	9
Other	13	20	6
None / Don't know	16	15	17

Base: Think CASA is doing a poor/ very poor job n=38

Q. What is the main reason why you think the Civil Aviation Safety Authority (CASA) is doing a <poor/ very poor> job?

4.2

Safety of commercial flights



Summary: Safety of commercial flights

- Two thirds of Australians (65%) have travelled on a commercial flight within Australia in the past two years.
- The majority of Australians (75%) are very or completely confident about arriving safely if travelling on a commercial flight within Australia while just 3% are not confident. Men (48%), older Australians (47%) and recent flyers (48%) are more likely to be completely confident.
- The main concerns among those who are not confident about travelling on a commercial flight include the possibility of a disaster/ crash (31%), inadequate plane maintenance (26%) and security issues (16%).
- Most Australians (80%) believe commercial airline flights in Australia are just as safe or more safe now than they were 5 years ago. Just 13% think they are less safe.
- Perceptions that commercial airlines flights are more safe now are being driven by views that technology is more advanced (38%), that airport security has improved (23%), that there are new safety rules (12%) and increased emphasis on safety (10%) compared to five years ago.
- Concerns that commercial airline flights are less safe than five years ago are based on perceptions of cost cutting and outsourcing of maintenance (55%), security issues (24%) and increased accidents and incidents (12%).

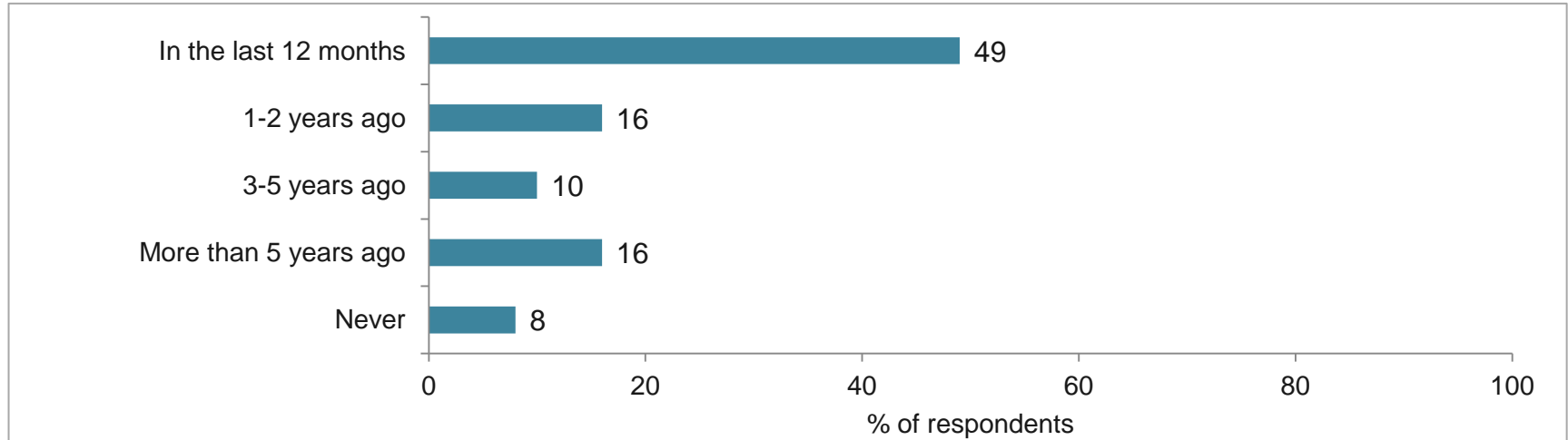


Summary: Safety of commercial flights cont'd...

- Around six in ten (60%) Australians think commercial airline flights are safer in Australia than in the US or Europe, 27% think they are just as safe and just 3% less safe.
- Reasons given by those who believe that commercial flights in Australia are more safe, include that Australia is a safe place with a lower threat of security issues (26%), high levels of air safety and better regulations (20%) and a good historical safety record (19%).
- Views that commercial flights within Australia are less safe are based on perception that there are less security checks (15%), maintenance issues (15%) and security issues (14%).
- Just under half of Australians (44%) think that CASA should supervise commercial airlines more closely while 33% believe no change is required.

Last time travelled on a commercial flight

Around half of Australians (49%) have travelled on a commercial flight in the last 12 months, one quarter (26%) in the last 1-5 years, 16% more than five years ago and just 8% have never travelled on a commercial flight.



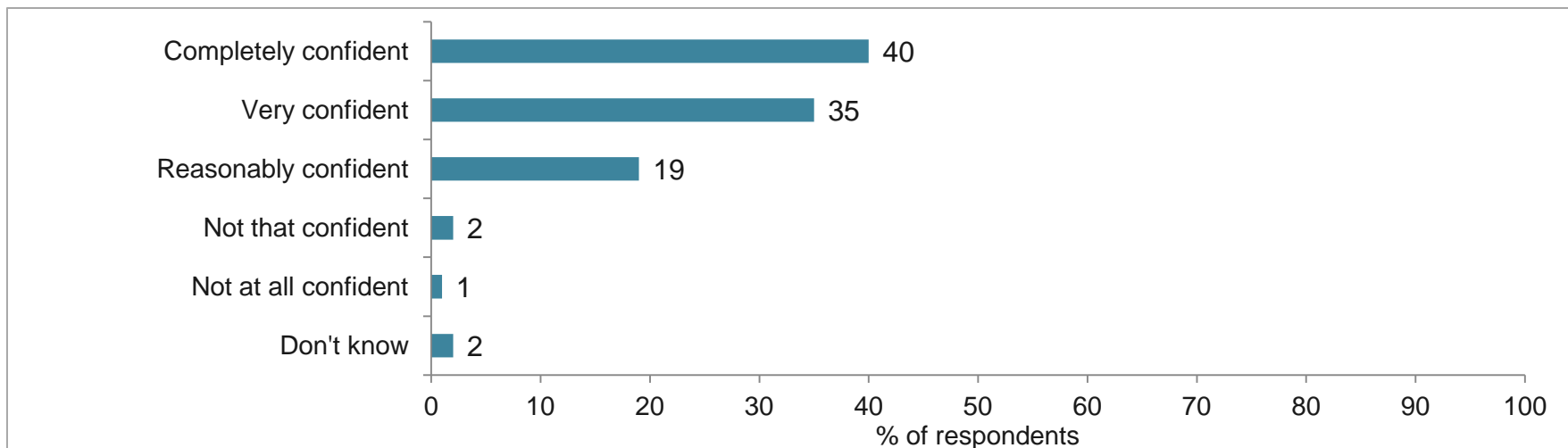
Last time travelled on a commercial flight	Total (n=1,019)	Men (n=504)	Women (n=515)	Gen Y (n=312)	Gen X (n=279)	Baby Boomers (n=241)	Traditionalists (n=187)
In the last 12 months	49	51	48	51	54	44	48
1-2 years ago	16	16	16	17	14	18	16
3-5 years ago	10	9	11	11	8	10	12
More than 5 years ago	16	16	17	9	15	25	20
Never	8	8	7	12	8	4	4

Base: Total n=1,019

Q. When was the last time you travelled on a commercial airline flight within Australia?

Confidence in arriving safely if travelling on a commercial airline flight today within Australia

The majority of Australians (75%) are very or completely confident of arriving safely if travelling on a commercial flight today within Australia. Men (48%), older Australians (50%) and those who have flown in the past 12 months (48%) are more likely to be completely confident of arriving safely.



Confidence in arriving safely if travelling on Commercial flight within Australia today	Total (n=1,019)	Men (n=504)	Women (n=515)	Gen Y (n=312)	Gen X (n=279)	Baby Boomers (n=241)	Tradition -alists (n=187)	Flown last 12 months (n=507)	Flown 1-2 years ago (n=163)	Flown 3+ years ago (n=277)	Never flown on commercial flight (n=72)
Completely confident	40	48	33	31	39	44	50	48	38	33	18
Very confident	35	32	38	42	33	32	31	34	39	37	24
Reasonably confident	19	15	23	19	21	18	15	15	22	21	26
Not that confident	2	1	4	3	2	2	2	2	1	4	5
Not at all confident	1	2	1	3	1	1	1	1	-	1	10
Don't know	2	3	2	2	3	3	2	0	-	4	17

Base: Total n=1,019

Q. If you were to board a commercial airline flight today and travelling within Australia, how confident would you be about arriving safely at your destination?

Reasons why not confident would arrive safely if travelling on a commercial flight today within Australia

The possibility of a mid-air disaster or crash (31%), poor plane maintenance/ safety (28%) and security issues (18%) are the main reasons given for feeling not confident about the safety of travelling on a commercial flight within Australia.

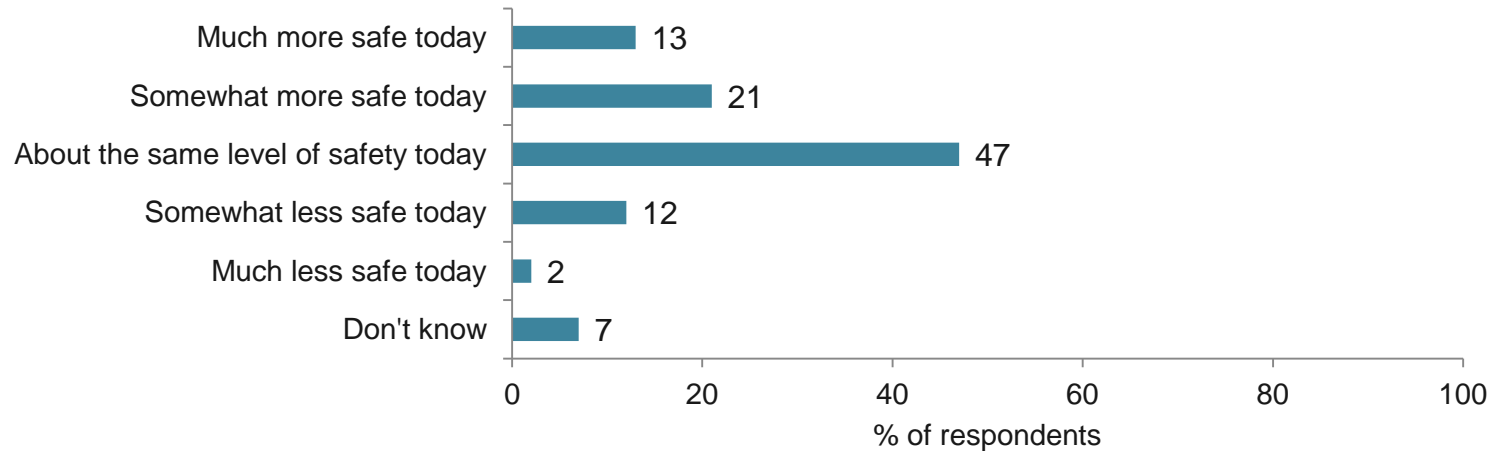
	Total (n=36)	Men (n=14)	Women (n=22)
Disasters happen/ planes crash (Malaysian Airlines)	31	16	41
Plane maintenance/ safety	28	17	34
Security issues	18	6	25
Fear of flying/ dislike flying	16	12	19
High risk	10	19	5
Cost of flying	2	5	-
Aggressive passengers	2	6	-
Other	2	5	-
None / Don't know	11	31	-

Base: total n=36; not that/ not at all confident if you boarded a commercial flight you would arrive safely at your destination

Q. What is the main reason why you are <not that/ not at all confident> that if you boarded a commercial airline flight today and were travelling within Australia that you would arrive safely at your destination?

Safety of commercial airline flights in Australia compared to five years ago

Almost half of Australians (47%) believe commercial airlines flights in Australia are just as safe today as they were five years ago while one third (33%) believe they are more safe and just 13% less safe. Gen Y (42%), Traditionalists (39%) and those who have flown in the last 12 months (38%) are more likely to believe commercial airline flights are more safe now than five years ago.



Safety of commercial airline flights in Australia compared to 5 years ago	Total (n=1,019)	Men (n=504)	Women (n=515)	Gen Y (n=312)	Gen X (n=279)	Baby Boomers (n=241)	Tradition-alists (n=187)	Flown last 12 months (n=507)	Flown 1-2 years ago (n=163)	Flown 3+ years ago (n=277)	Never flown on commercial flight (n=72)
Much more safe today	13	15	11	17	9	10	15	15	14	9	10
Somewhat more safe today	21	22	19	25	18	15	24	23	21	18	15
About the same level of safety today	47	48	45	42	51	51	42	47	51	48	32
Somewhat less safe today	12	10	13	7	11	15	14	11	10	14	10
Much less safe today	2	1	2	1	2	3	1	1	1	3	6
Don't know	7	4	9	8	9	5	4	4	3	8	27

Base: Total n=1,019

Q. How would you describe the safety of commercial airline flights in Australia compared to five years ago?

Reasons why commercial flights in Australia are more safe today than five years ago

The main reasons given for believing that commercial flights in Australia are more safe now than five years ago are that technology is more advanced (38%), there is improved airport security/ screening (23%), there are new safety rules (12%) and an increased focus on safety (10%).

	Total (n=338)	Men (n=183)	Women (n=155)	Gen Y (n=128)	Gen X (n=77)	Baby Boomers (n=61)	Tradition- alists (n=72)
Technology more advanced	38	36	40	48	42	27	25
Airport security/ screening	23	19	28	17	24	21	37
New safety rules/ OH&S standards	12	13	11	16	10	19	3
Safety as paramount/ more precautions	10	10	10	9	7	18	8
Plane maintenance/ built better	10	10	10	5	9	10	20
Learned from previous mistakes/ aware of issues (eg: Tiger Airways)	8	6	10	5	11	8	8
Pilot experience and training better	5	4	6	1	6	5	11
Still hear complaints	2	2	1	3	1	-	1
Maintenance done overseas	1	1	-	1	-	-	1
Other	6	6	5	4	7	11	3
None / Don't know	9	12	5	14	6	4	7

Base: Think commercial airline flights are more safe today than 5 years ago n=338

Q. What is the main reason why you think commercial airline flights in Australia are <somewhat/ much more safe> today?

Reasons why commercial flights in Australia are less safe today than five years ago

The main reason given for commercial flights in Australia being less safe today than five years ago is that there has been a lot of cost cutting and outsourcing of aircraft maintenance (55%). Other reasons include security issues (24%) and an increase in accidents and incidents (12%).

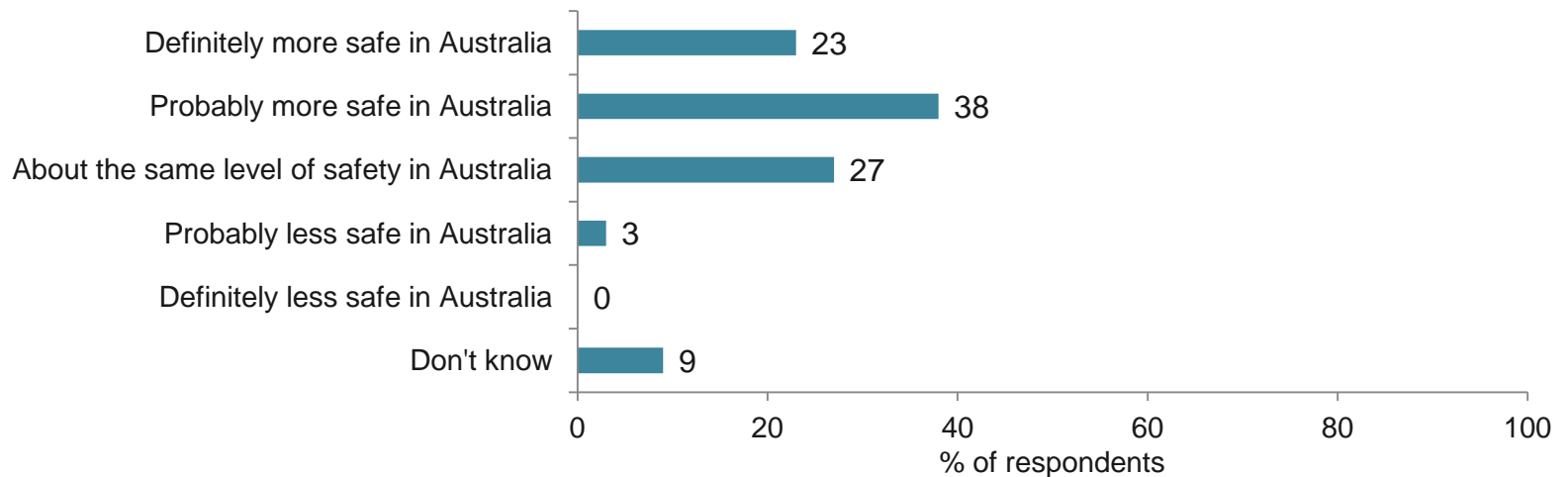
	Total (n=136)	Men (n=57)	Women (n=79)
Cutting cost/ less maintenance/ overseas maintenance	55	60	51
Security issues	24	18	29
More accidents/ incidents (MH370)/ disappearing planes	12	8	16
Safety issues	9	11	7
Irrational people	7	6	7
Fuel costs	1	-	2
Other	4	7	2
None / Don't know	3	7	-

Base: Think commercial airline flights are less safe today than 5 years ago n=136

Q. What is the main reason why you think commercial airline flights in Australia are <somewhat/ much less safe> today?

Safety of commercial airline flights in Australia compared with flights in the US or Europe

The majority of Australians (60%) believe that commercial flights are safer in Australia than in the US or Europe. Men (65%) and older Australians (69%) are more likely to believe that commercial flights are safer in Australia.



Safety of commercial airline flights in Australia compared to US/ Europe	Total (n=1,019)	Men (n=504)	Women (n=515)	Gen Y (n=312)	Gen X (n=279)	Baby Boomers (n=241)	Tradition -alists (n=187)	Flown last 12 months (n=507)	Flown 1-2 years ago (n=163)	Flown 3+ years ago (n=277)	Never flown on commercial flight (n=72)
Definitely more safe in Aust	23	25	20	13	23	28	29	27	19	19	15
Probably more safe in Aust	38	40	36	39	32	39	41	36	42	42	23
About the same level of safety in Australia	27	26	28	33	30	19	25	27	28	25	33
Probably less safe in Australia	3	2	4	2	3	6	-	3	2	3	2
Definitely less safe in Aust	0	0	-	-	0	0	-	0	-	-	-
Don't know	9	7	12	12	12	7	5	6	8	11	27

Base: Total n=1,019

Q. How would you describe the safety of commercial airline flights in Australia compared with flights in the US or Europe?

Reasons why commercial flights in Australia are more safe than commercial flights in US/ Europe

The most common reasons for thinking commercial flights in Australia are safer than commercial flights in the US or Europe are that Australia is a safe place with a low threat of security issues (26%), that air safety is high and we have better regulations (20%) and that we have good historical records of safety (19%).

	Total (n=608)	Men (n=323)	Women (n=285)	Gen Y (n=158)	Gen X (n=156)	Baby Boomers (n=162)	Tradition- alists (n=132)
Australia is a safe place/ low threat of security issues (separated by oceans)	26	24	28	24	30	25	24
Air safety is high/ better regulations	20	22	18	20	25	19	18
Good historical records of safety	19	20	17	18	15	22	19
Less air traffic/ flights	13	15	10	12	10	14	17
More security measures	9	8	10	8	7	10	10
Better quality planes/ maintenance	7	5	9	5	7	6	11
No wars	5	3	7	4	2	5	7
Better pilots	2	1	3	0	1	2	4
Better technology	2	3	2	3	3	2	2
Other	6	5	6	4	6	6	7
None / Don't know	8	8	7	13	9	5	3

Base: Think commercial airline flights are more safe in Australia than US/ Europe n=608

Q. What is the main reason why you think commercial airline flights are <probably/ definitely more safe> in Australia?

Reasons why commercial flights in Australia are less safe than commercial flights in US/ Europe

The main reasons given for thinking that commercial flights in Australia are less safe than in US or Europe are that less security checks are carried out (15%), maintenance issues including outsourcing (15%), security issues (14%) and lower safety standards in Australia (13%).

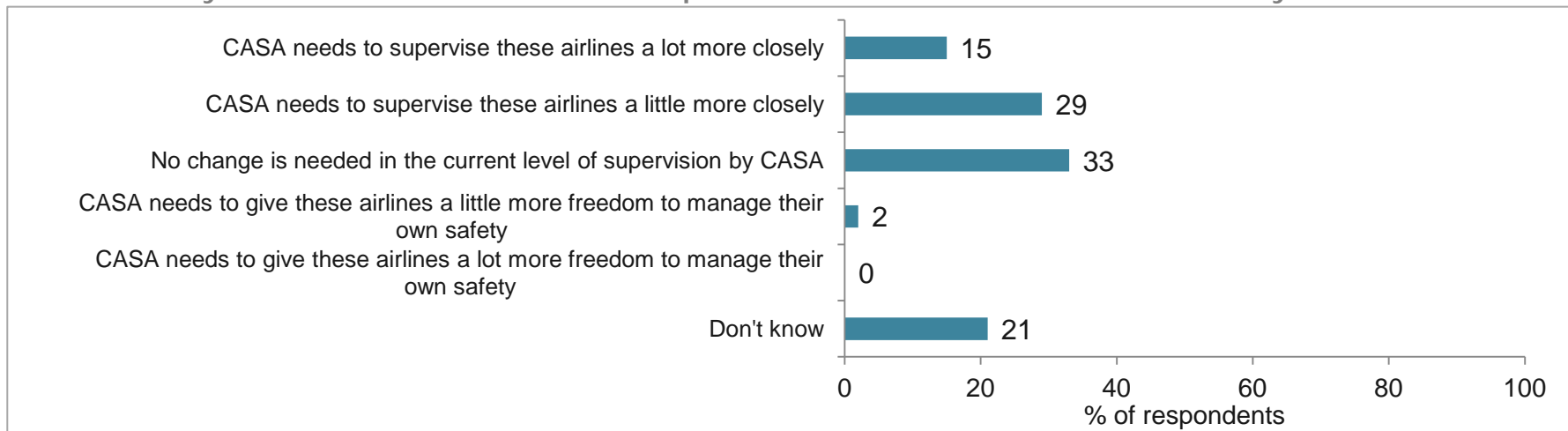
	Total (n=32)	Men (n=12)	Women (n=20)
Less security checks	15	25	10
Maintenance issues (overseas maintenance)	15	15	16
Security issues	14	6	18
Safety standards lower than US/ Europe	13	-	20
Cost-cutting	4	-	6
Bad management	3	-	4
Other	19	15	22
None / Don't know	23	40	14

Base: Think commercial airline flights are less safe in Australia than commercial flights in US/ Europe n=32

Q. What is the main reason why you think commercial airline flights in Australia are <probably/ definitely less safe>?

Supervision of major commercial airlines

Just under half of Australians (44%) believe that CASA should supervise major commercial airlines more closely, while 33% believe no change in supervision is needed and just 2% that more freedom should be provided to commercial airlines to manage their own safety. Baby Boomers (52%) are more likely to believe that CASA should supervise commercial airlines more closely.



Supervision of major commercial airlines	Total (n=1,019)	Men (n=504)	Women (n=515)	Gen Y (n=312)	Gen X (n=279)	Baby Boomers (n=241)	Tradition -alists (n=187)	Flown last 12 months (n=507)	Flown 1-2 years ago (n=163)	Flown 3+ years ago (n=277)	Never flown on commercial flight (n=72)
Supervise a lot more closely	15	15	16	10	13	23	17	15	15	15	18
Supervise a little more closely	29	27	30	29	28	29	27	29	31	28	19
No change needed in level of supervision	33	37	29	32	34	31	38	35	35	34	14
A little more freedom	2	2	1	0	3	1	3	2	1	1	2
A lot more freedom	0	0	0	-	0	0	0	0	1	-	-
Don't know	21	19	23	29	21	17	15	18	17	22	47

Base: Total n=1,019

Q. Thinking about the Civil Aviation Safety Authority's (CASA's) supervision of the safety of major airlines such as Qantas, Virgin and Tiger. Which of the following statements best describes your views?

4.3

Safety of smaller charter aircraft operations

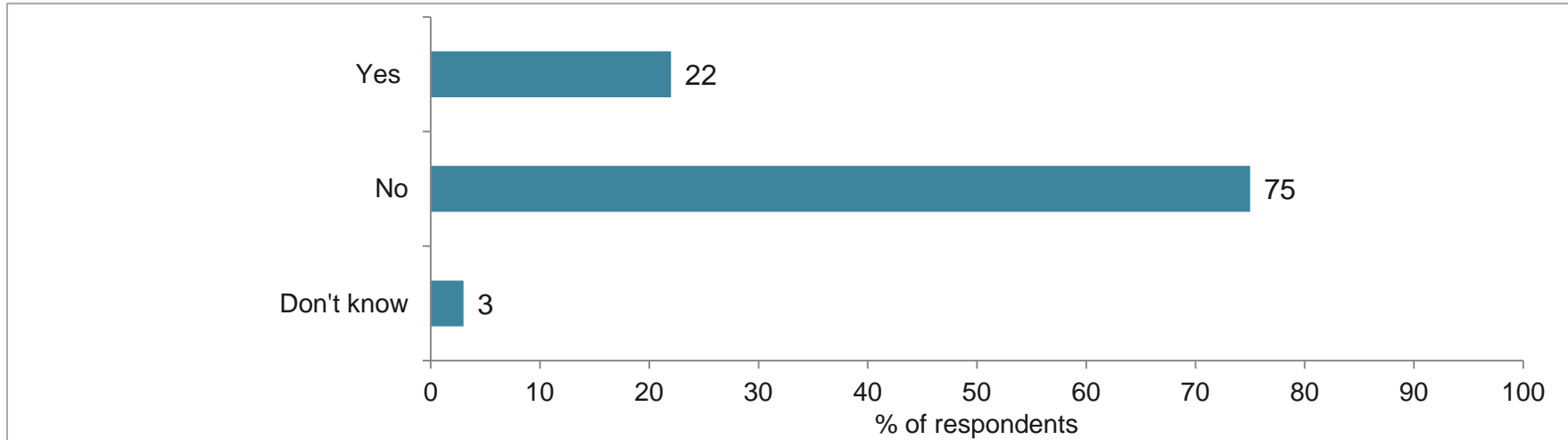


Summary: Safety of charter flights

- Around one in five Australians (22%) have ever flown in a smaller aircraft on a charter flight within Australia.
- Australians are not as confident about the safety of charter flights with 20% very or completely confident, 39% reasonably confident and 27% not that or not at all confident.
- Among those who are not confident about the safety of charter flights, the main reasons given are that smaller aircraft are less safe (38%), that more accidents happen (29%), and that there is less regulation of charter airline operators overall (17%).
- The majority of Australians (54%) believe that CASA should supervise charter airline operators more, or a lot more closely while 20% believe no change is needed and 25% are unsure.

Ever flown in a smaller aircraft on a charter flight within Australia

Around one in five Australians (22%) have flown in a smaller aircraft on a charter flight in Australia. Baby Boomers (28%) are more likely to have flown on a charter flight.



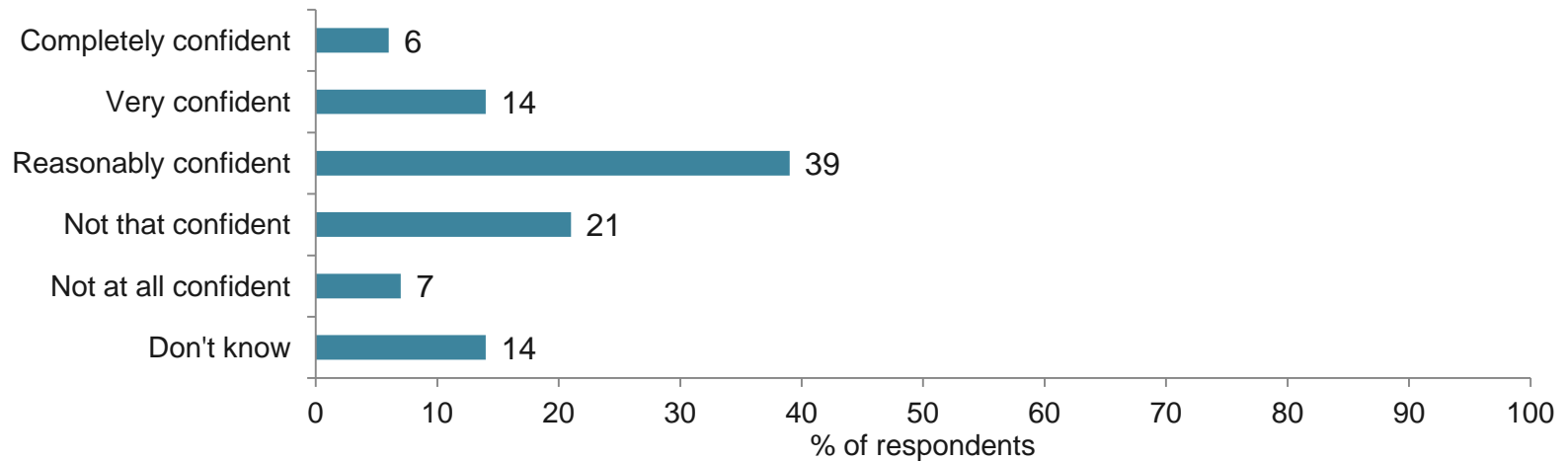
Ever flown on charter flight in Australia	Total (n=1,019)	Men (n=504)	Women (n=515)	Gen Y (n=312)	Gen X (n=279)	Baby Boomers (n=241)	Tradition -alists (n=187)	Flown last 12 months (n=507)	Flown 1-2 years ago (n=163)	Flown 3+ years ago (n=277)	Never flown on commercial flight (n=72)
Yes	22	25	19	16	20	28	25	24	23	20	8
No	75	72	78	80	75	70	75	73	74	76	85
Don't know	3	3	3	5	4	2	1	3	3	3	7

Base: Total n=1,019

Q. Have you ever flown in a smaller aircraft on a charter flight within Australia. These are flights that don't operate to a schedule like an airline.

Confidence about safety of flying in smaller aircraft on a charter flight within Australia

Australians are less confident about the safety of flying on smaller, charter flights compared to commercial flights. One in five (20%) are confident or very confident of the safety while 39% are reasonably confident and 27% are not that or not at all confident.



Confidence about safety of flying on charter flight within Australia	Total (n=1,019)	Men (n=504)	Women (n=515)	Gen Y (n=312)	Gen X (n=279)	Baby Boomers (n=241)	Tradition -alists (n=187)	Flown 27 n last 12 months (n=507)	Flown 1-2 years ago (n=163)	Flown 3+ years ago (n=277)	Never flown on commercial flight (n=72)
Completely confident	6	9	3	8	6	4	6	7	4	6	3
Very confident	14	17	12	13	13	15	17	17	16	9	12
Reasonably confident	39	39	38	34	42	38	40	41	45	36	17
Not that confident	21	18	23	20	22	21	20	19	17	26	21
Not at all confident	7	5	8	4	7	10	7	4	7	8	16
Don't know	14	13	15	21	10	11	11	11	11	16	32

Base: Total n=1,019

Q. How confident are you about the safety of flying in smaller aircraft on a charter flight within Australia?

Reasons why not confident about flying in smaller aircraft on a charter flight within Australia

The main reasons given for not being confident about flying in smaller aircraft on a charter flight are that smaller aircraft are less safe (38%), that accidents and incidents occur with smaller aircraft (29%) and that there is less regulation (17%).

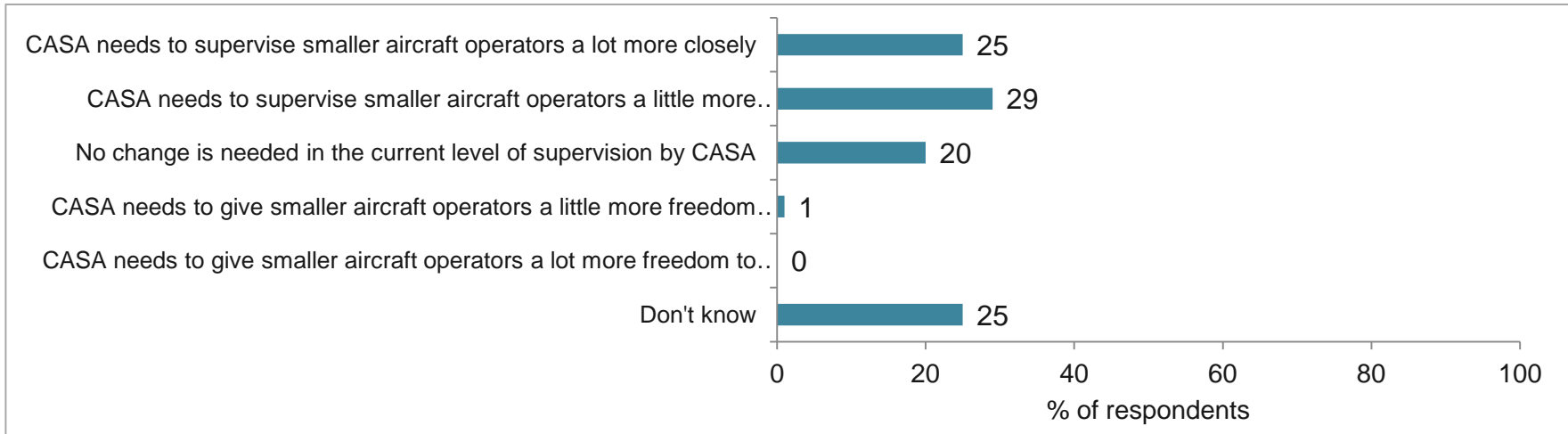
Reasons	Total (n=275)	Men (n=116)	Women (n=159)	Gen Y (n=71)	Gen X (n=77)	Baby Boomers (n=76)	Tradition- alists (n=51)
Small aircraft less safe/ less safe than larger aircraft (don't feel safe)	38	32	43	43	38	36	36
Accidents happen/ incidents with smaller aircraft	29	29	29	34	26	34	19
Less regulation	17	16	19	14	15	19	24
Lack of maintenance	6	9	3	3	8	5	7
Fear of flying	5	3	6	6	4	3	7
Pilot error leading to crashes	4	3	5	1	4	6	6
Other	6	9	4	5	8	5	6
None / Don't know	7	8	6	7	12	3	5

Base: Not confident about safety of travelling on smaller aircraft on a charter flight n=275

Q. What is the main reason why you are <not that/ not at all confident> about the safety of flying in smaller aircraft on a charter flight within Australia?

CASA supervision of smaller charter aircraft operations

More than half of Australians (54%) think that CASA should supervise smaller charter aircraft operators more closely while a further 20% think no change is required and 25% are unsure. Just 1% of Australians think CASA should give smaller charter aircraft operators more freedom. Just 1% of Australians think CASA should give smaller charter aircraft operators more freedom.



Supervision of smaller charter aircraft operations	Total (n=1,019)	Men (n=504)	Women (n=515)	Gen Y (n=312)	Gen X (n=279)	Baby Boomers (n=241)	Tradition -alists (n=187)	Flown last 12 months (n=507)	Flown 1-2 years ago (n=163)	Flown 3+ years ago (n=277)	Never flown on commercial flight (n=72)
Supervise a lot more closely	25	25	25	18	26	33	25	24	28	28	18
Supervise a little more closely	29	27	30	24	25	32	38	32	30	26	14
No change needed in level of supervision	20	25	15	22	22	16	19	22	21	17	18
A little more freedom	1	2	1	1	1	1	2	1	1	1	-
A lot more freedom	0	0	-	0	-	0	-	0	1	-	-
Don't know	25	21	28	35	26	17	17	21	19	28	51

Base: Total n=1,019

Q. Thinking about the Civil Aviation Safety Authority's (CASA's) supervision of smaller charter aircraft operations, which of the following statements best describes your views?

4.4

Safety of private flights

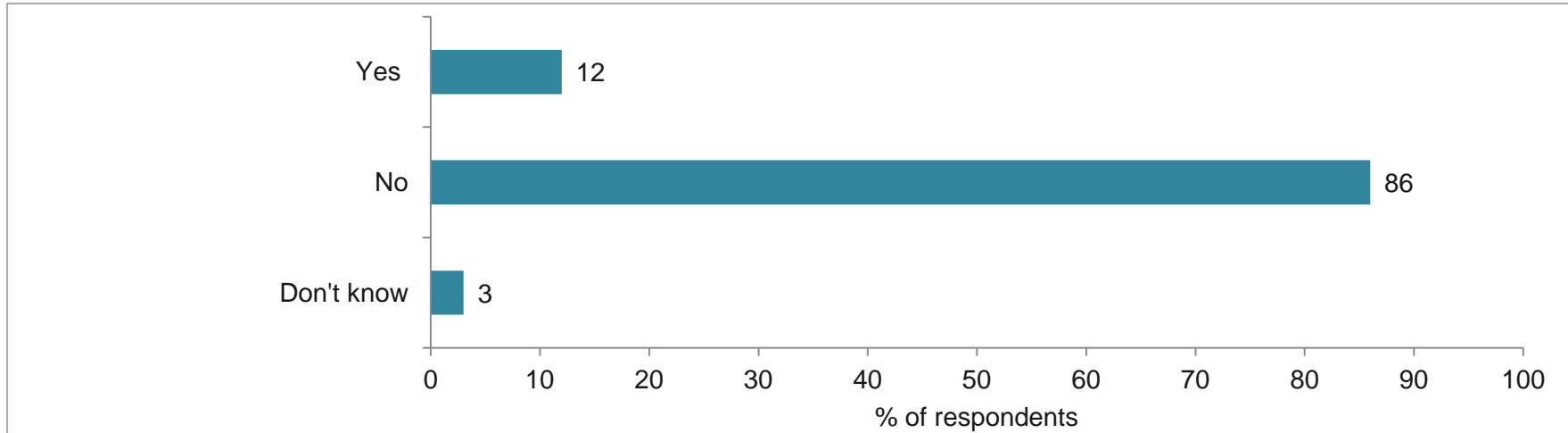


Summary: Safety of private flights

- Around one in ten Australians (12%) have ever flown on a private aircraft within Australia.
- Confidence about the safety of flying in private aircraft within Australia is similar to confidence levels about the safety of charter flights. Around one in five Australians (20%) are very or completely confident, 35% reasonably confident, 22% not that or not at all confident and 24% unsure.
- Lack of confidence about the safety of private flights has arisen from seeing fatal air accidents and crashes on the news, a belief that there is less regulation of private flights and a lack of trust of private aircraft and pilots.
- Around half of Australians (49%) think CASA needs to supervise private flights more closely, while 21% think no change is needed and 29% are unsure. Older Australians (59%) are more likely to think CASA needs to supervise private flights more closely.

Ever flown on a private aircraft within Australia

Around one in ten Australians (12%) have ever flown on a private aircraft within Australia. Men (16%), older Australians (15%), and those who have travelled on a commercial flight in the last 1-2 years (16%) are more likely to have flown on a private aircraft.



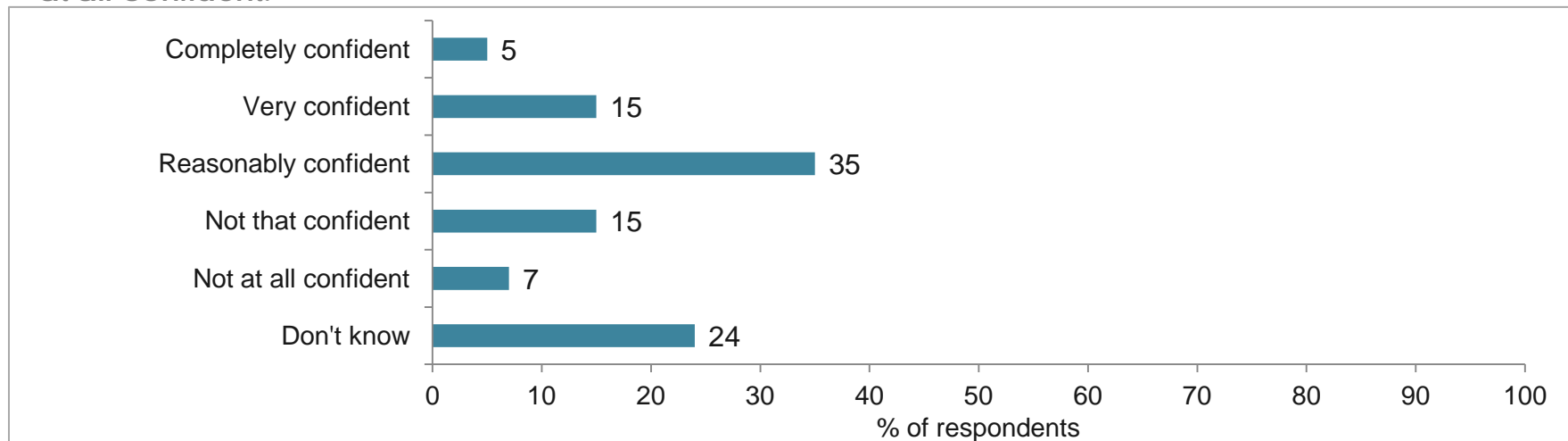
Ever flown on private flight in Australia	Total (n=1,019)	Men (n=504)	Women (n=515)	Gen Y (n=312)	Gen X (n=279)	Baby Boomers (n=241)	Tradition -alists (n=187)	Flown last 12 months (n=507)	Flown 1-2 years ago (n=163)	Flown 3+ years ago (n=277)	Never flown on commercial flight (n=72)
Yes	12	16	8	7	11	15	15	13	16	9	2
No	86	82	89	88	85	83	85	84	82	88	92
Don't know	3	3	3	4	3	2	-	3	1	3	6

Base: Total n=1,019

Q. Have you ever flown on a private aircraft within Australia? Private aircraft are usually small and they are flights that you have not paid for and could be with someone you know who is a pilot?

Confidence about safety of flying in private aircraft within Australia

Around one in five Australians (20%) are very or completely confident about the safety of flying in private aircraft within Australia while a further 35% are reasonably confident and 22% not that or not at all confident.



Confidence about safety of flying on private flights in Australia	Total (n=1,019)	Men (n=504)	Women (n=515)	Gen Y (n=312)	Gen X (n=279)	Baby Boomers (n=241)	Tradition -alists (n=187)	Flown last 12 months (n=507)	Flown 1-2 years ago (n=163)	Flown 3+ years ago (n=277)	Never flown on commercial flight (n=72)
Completely confident	5	7	3	6	5	3	5	6	3	5	8
Very confident	15	18	11	17	16	12	12	16	21	10	6
Reasonably confident	35	35	34	33	33	38	36	37	36	33	24
Not that confident	15	12	17	9	13	18	23	16	12	15	11
Not at all confident	7	5	9	3	9	9	8	6	7	8	9
Don't know	24	22	26	33	24	19	17	19	22	30	41

Base: Total n=1,019

Q. How confident are you about the safety of flying in private aircraft within Australia?

Reasons why not confident about flying in private aircraft within Australia

Among those who are not confident about the safety of flying in private aircraft, the main reasons given are having seen accidents on the news with fatalities (28%), less regulation of private aircraft operators (17%), a lack of trust of private aircraft and pilots (17%) and smaller aircraft are less safe (17%).

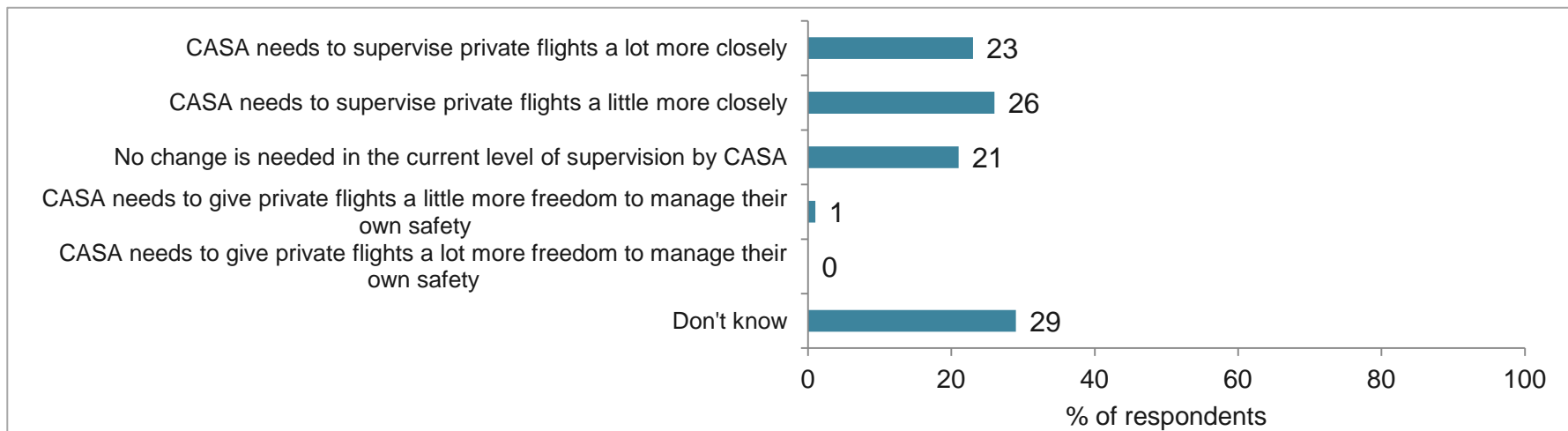
Reasons	Total (n=219)	Men (n=87)	Women (n=132)	Gen Y (n=37)	Gen X (n=59)	Baby Boomers (n=66)	Tradition- alists (n=57)
Accidents/ crashes on the news (fatalities)	28	26	30	33	20	28	34
Less regulation	17	20	15	31	19	9	15
Do not trust aircraft/ pilot	17	15	19	15	18	19	16
Less safe/ smaller aircraft less safe	17	13	19	12	13	22	18
Less maintenance	10	16	6	2	12	13	10
Fear of flying	5	2	7	2	7	3	8
Other	4	3	4	2	5	6	2
None / Don't know	9	12	7	8	17	7	5

Base: Not confident about safety of flying in private aircraft n=219

Q. What is the main reason why you are <not that/ not at all confident> about the safety of flying in private aircraft within Australia?

CASA supervision of private flights

Around half of Australians (49%) think that CASA should supervise private flights more closely while a further 21% believe that no change in supervision is required and 29% are unsure. Older Australians (60%) are more likely to think that CASA should supervise private flights more closely.



Supervision of private flights	Total (n=1,019)	Men (n=504)	Women (n=515)	Gen Y (n=312)	Gen X (n=279)	Baby Boomers (n=241)	Tradition -alists (n=187)	Flown last 12 months (n=507)	Flown 1-2 years ago (n=163)	Flown 3+ years ago (n=277)	Never flown on commercial flight (n=72)
Supervise a lot more closely	23	20	25	15	22	31	25	24	22	24	14
Supervise a little more closely	26	26	27	20	24	30	34	27	29	26	16
No change needed in level of supervision	21	28	15	26	23	17	17	23	25	17	18
A little more freedom	1	2	1	1	1	2	2	2	-	2	-
A lot more freedom	0	0	0	-	-	0	0	0	1	-	-
Don't know	29	24	33	38	30	20	21	24	24	32	53

Base: Total n=1,019

Q. Thinking about the Civil Aviation Safety Authority's (CASA's) supervision of private flights, which of the following statements best describes your views?

4.5

Use of electronic devices on commercial flights

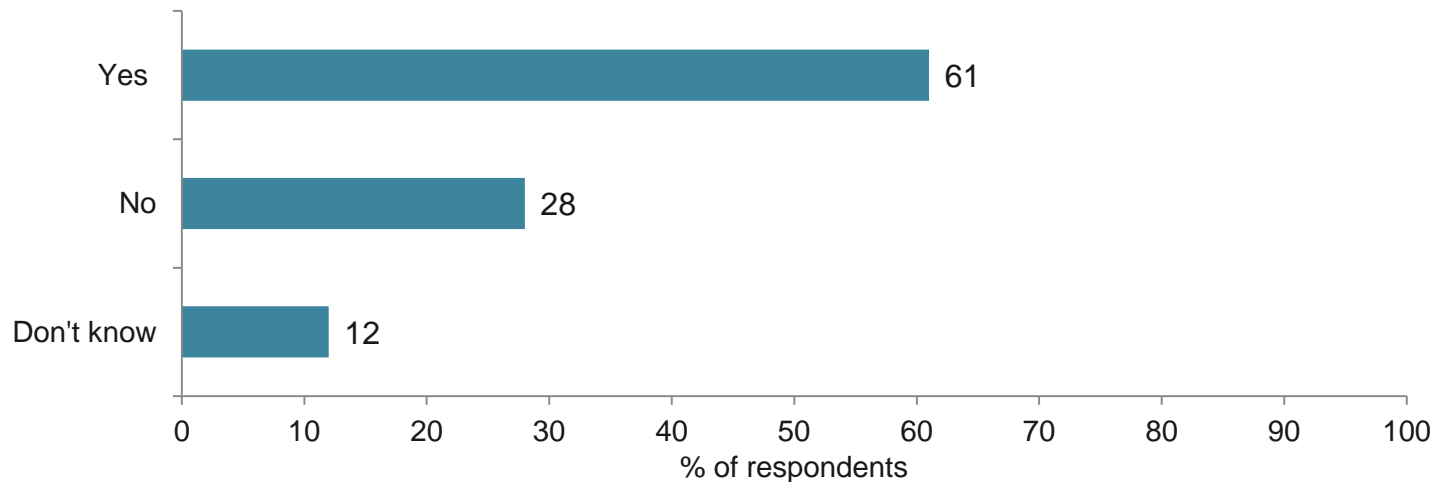


Summary: Use of electronic devices on aircraft

- The majority of Australians (61%) are aware of the recent CASA ruling to change the way in which electronic devices can be used on commercial flights.
- Among those aware:
 - 71% believe CASA managed the safety issues related to use of electronic devices in aircraft well while just 11% think safety issues were managed poorly and 18% are unsure.
 - 76% believe CASA communicated the changes well while 15% believe communication was poor and 9% are unsure.

Aware of recent CASA ruling on use of electronic devices on commercial flights

Around six in ten Australians (61%) are aware of the recent CASA ruling to change the way in which electronic devices can be used on commercial flights. Older Australians (70%) and those who have flown in the last 2 years (69%) are more likely to be aware of the changes.



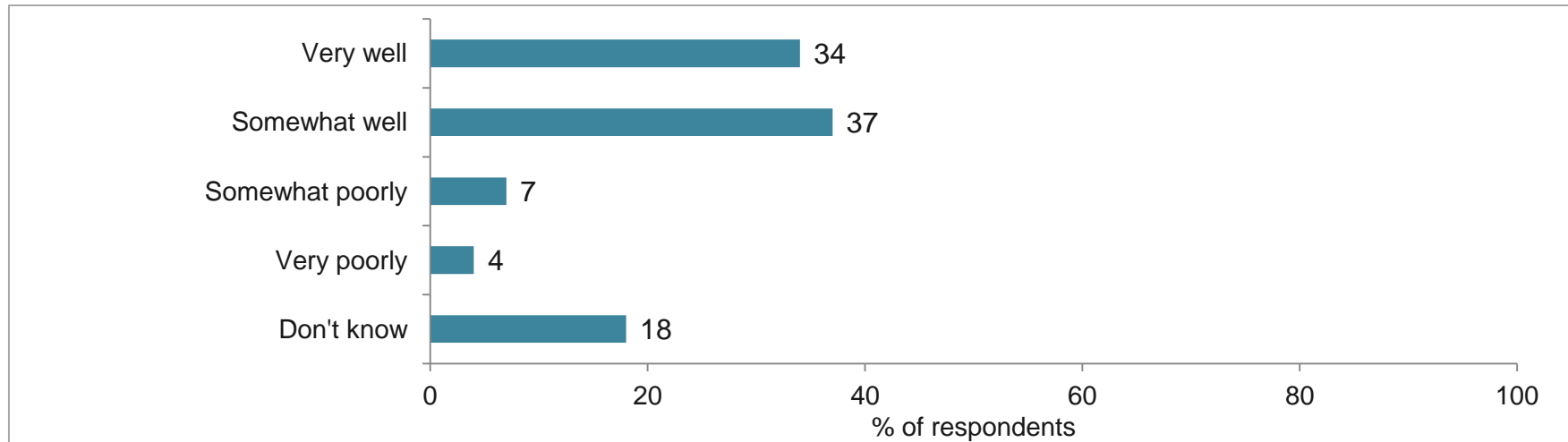
Aware of CASA ruling on use of electronic devices	Total (n=1,019)	Men (n=504)	Women (n=515)	Gen Y (n=312)	Gen X (n=279)	Baby Boomers (n=241)	Tradition -alists (n=187)	Flown last 12 months (n=507)	Flown 1-2 years ago (n=163)	Flown 3+ years ago (n=277)	Never flown on commercial flight (n=72)
Yes	61	61	61	51	58	69	71	69	68	52	23
No	28	26	29	31	28	25	23	19	23	38	52
Don't know	12	13	10	18	14	6	6	11	9	9	25

Base: Total n=1,019

Q. CASA recently made a ruling to allow passengers to use small electronic devices, such as smart phones, tablets and e-readers on 'in-flight- mode' on commercial flights within Australia. Before today, were you aware of CASA's ruling to allow the use of electronic devices on 'in-flight mode' on commercial flights within Australia?

How well CASA managed safety issues related to use of electronic devices on aircraft

Around three quarters of those aware of the CASA ruling to change the way electronic devices can be used on aircraft (71%) believe that CASA managed the safety issues related to use of electronic devices on aircraft well, while 11% believe it was poor.



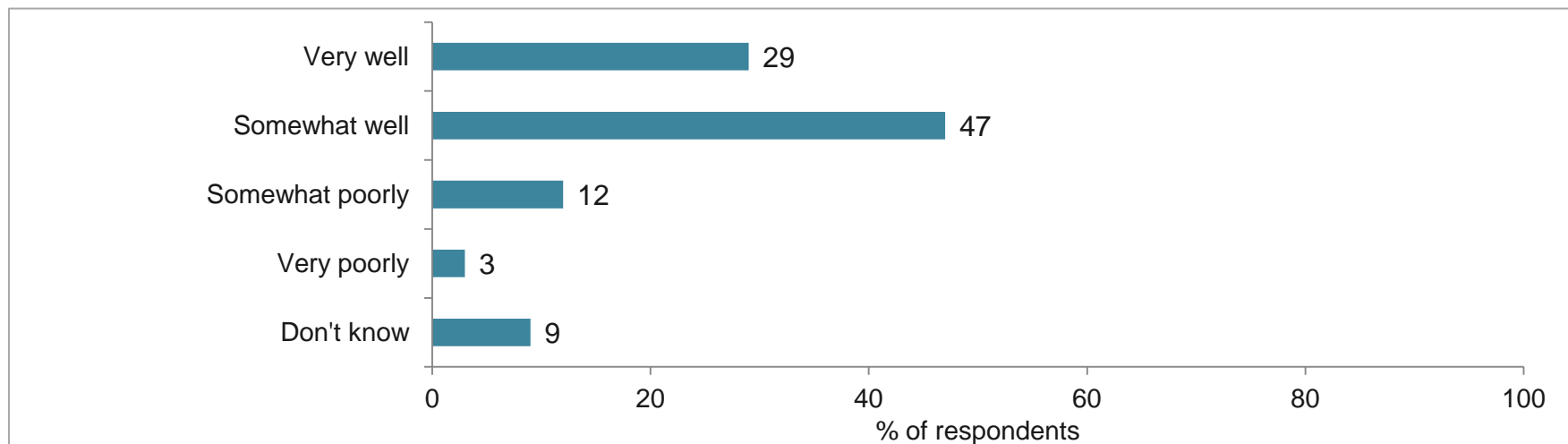
How well CASA managed safety issues related to use of electronic devices on aircraft	Total (n=620)	Men (n=307)	Women (n=313)	Gen Y (n=161)	Gen X (n=162)	Baby Boomers (n=166)	Tradition- -alists (n=131)	Flown last 12 months (n=349)	Flown 1-2 years ago (n=108)	Flown 3+ years ago (n=145)	Never flown on commercial flight (n=18)
Very well	34	37	30	33	38	31	33	36	31	32	17
Somewhat well	37	38	36	46	29	35	41	38	41	35	23
Somewhat poorly	7	6	8	6	11	7	5	7	6	8	15
Very poorly	4	4	4	3	5	4	5	4	2	5	15
Don't know	18	14	21	13	18	24	16	15	20	20	30

Base: Aware of CASA ruling to allow use of electronic devices on aircraft n=620

Q. How well do you think CASA has managed the safety issues related to the use of electronic devices on aircraft?

How well CASA communicated the change in the way electronic devices can be used on aircraft

Around three quarters of those aware of the CASA ruling to change the way electronic devices can be used on aircraft (76%) believe that CASA communicated the changes well, while 15% believe communication was poor.



How well CASA communicated the change in the way electronic devices can be used on aircraft	Total (n=620)	Men (n=307)	Women (n=313)	Gen Y (n=161)	Gen X (n=162)	Baby Boomers (n=166)	Traditionalists (n=131)	Flown last 12 months (n=349)	Flown 1-2 years ago (n=108)	Flown 3+ years ago (n=145)	Never flown on commercial flight (n=18)
Very well	29	28	31	28	30	29	30	30	26	31	17
Somewhat well	47	50	44	50	45	46	46	44	55	46	56
Somewhat poorly	12	11	13	11	13	12	12	14	8	11	11
Very poorly	3	3	3	0	3	5	3	4	2	2	-
Don't know	9	8	10	10	9	7	10	8	8	10	16

Base: Aware of CASA ruling to allow use of electronic devices on aircraft n=620

Q. How well do you think CASA has communicated the change in the way electronic devices can be used on aircraft?