

FASTER  
HORSES



Australian Government  
Civil Aviation Safety Authority

# CASA STAKEHOLDER SATISFACTION RESEARCH

© 2021 Faster Horses. All rights reserved. Contains Faster Horses' Confidential and Proprietary information and may not be disclosed or reproduced without the prior written consent of Faster Horses.



# CONTENTS

	PAGE
<b>01.</b> Overall satisfaction	8
<b>02.</b> Service delivery	15
<b>03.</b> Compliance & audit performance	22
<b>04.</b> Depth interviews (dissatisfied with relationship)	36
<b>05.</b> Depth interviews (stakeholders from key forums/networks)	40
<b>06.</b> Appendix: Demographic analysis	45
<b>07.</b> Appendix: Data tables	52

# BACKGROUND & OBJECTIVES

## BACKGROUND

- + CASA is seeking to develop a more customer centric philosophy with stakeholders and customers in its aims to make dealing with the organisation easier, cheaper and more efficient.
- + Following previous stakeholder satisfaction studies in 2015 and 2018 to track stakeholder satisfaction, CASA is now moving to a shorter, more agile stakeholder survey approach which will see a random sample of stakeholders surveyed twice yearly using a shorter, more succinct survey.
- + This more frequent survey approach aims to ensure CASA obtains more timely feedback on its performance and key areas where stakeholders feel improvement is needed.
- + The aviation sector is also undergoing rapid change with a significant uptake in the ownership and operation of unmanned aerial vehicles (UAVs, or drones); this has seen a new and different type of stakeholder for CASA to engage with than the traditional cohort of fixed wing and rotary aircraft pilots, owners and maintenance crews.

## RESEARCH OBJECTIVES

- + Measure stakeholders' satisfaction with CASA and the key drivers of this – including perceptions on how CASA has responded to the challenges of COVID.
- + Assess levels of satisfaction with CASA's service delivery, development of aviation safety regulations, consistency of decision making, ongoing dialogue with industry, and how well it performs its audit and compliance activities.
- + Explore whether ratings of CASA's performance and relationship with stakeholders have changed from previous results collected in 2018.



# METHODOLOGY

A mix of quantitative and qualitative methods were used across this project:



## Online survey

- + From a random stratified sample of CASA stakeholders, n=6,600 were invited to complete an 8-minute survey.
- + A total of n=755 stakeholders completed the survey, representing a response rate of 11.4%.
- + Fieldwork was completed between 16 November – 13 December 2020.



## Depth interviews

### With those who indicated having a poor relationship with CASA:

- + N=7, 45-minute follow-up depths with survey participants who rated their relationship with CASA as very poor or poor (i.e. 3 or lower on a 0-10 scale).
- + All depths conducted between 8-14 December, via Zoom/phone.

### With stakeholders representing key forums or networks:

- + N=3, 45-minute depth interviews were conducted with key stakeholders:
  - o A representative from The Australian Aviation Association Forum (TAAAF)
  - o A representative from Air Sport Australia Confederation
  - o A representative from General Aviation Advisory Network (GAAN)
- + Interviews conducted in December 2020 & January 2021.

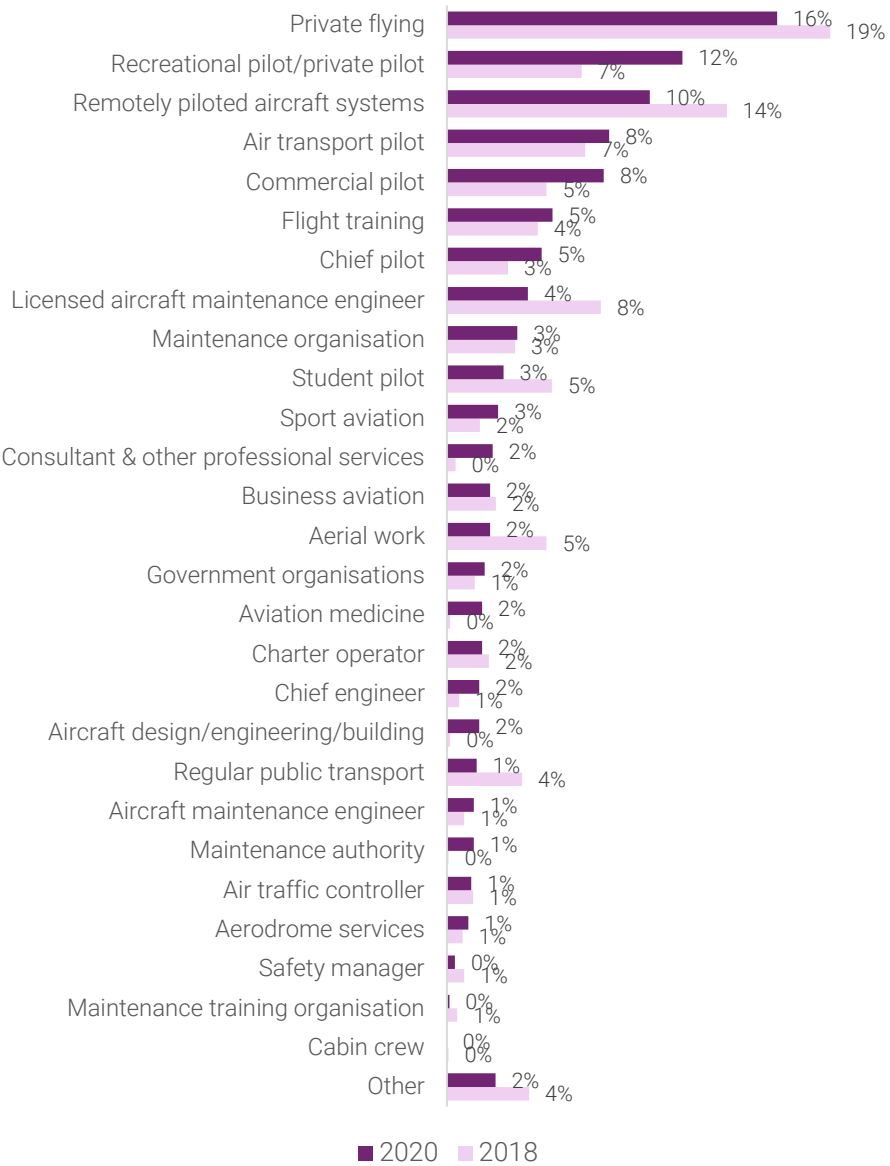
## REPORTING NOTES

- + Significance testing has been conducted by comparing the results between 2020 and 2018; further significance testing has been conducted across demographics in the Appendix section.
- + Differences that are significantly high have been shaded in blue in tables or marked with an upwards arrow (↑), and conversely, significantly low differences are shaded in red in tables or marked with a downwards arrow (↓).
- + Due to rounding, the percentage labels displayed in charts may not always add exactly to 100% (instead summing to 99% or 101%).

# SAMPLING APPROACH: ONLINE SURVEY

- + For the 2020 study, a stratified random sampling approach was used. Sampling quotas were set up to provide a robust sample size and to be appropriately representative of the broader CASA stakeholder population. The quotas were informed by the known population of 14 core stakeholder groups across CASA’s stakeholder database, including:
  - Pilot Licence Holders
  - RPAS Operators
  - Remote Pilot Licence Holders
  - Maintenance Licence Holders
  - Registered Aircraft Operators (Registrations)
  - Air Traffic Control (ATC) Licence Holders
  - Air Operators Certificate (AOC) Holders
  - Maintenance Organisations
  - Flight Training and Simulation Organisations
  - Aerodromes
  - Delegates
  - Dangerous Goods Training Organisations
  - Design and Manufacturing Organisations
  - Maintenance Training Organisations
- + After establishing these quotas, authorisation holders on CASA’s database were then randomly selected from each of these stakeholder groups to make up the 6,600 stakeholders invited to participate in the survey.
- + To ensure the integrity of responses, each stakeholder invitation contained a unique survey link. This prevents any one stakeholder group from disproportionately influencing the results and also ensures individuals cannot provide multiple responses.
- + A total of 755 completed surveys were returned by stakeholders by the end of the survey period.
- + The final sample breakdown was broadly similar to that obtained for the 2018 survey, meaning findings between the two studies can be appropriately compared.

## WHAT BEST DESCRIBES YOUR CURRENT PRIMARY ROLE IN THE AVIATION SECTOR?





# KEY FINDINGS



## REASONABLE LEVEL OF SATISFACTION WITH CASA'S EFFORTS DURING COVID-19 PERIOD

- + Stakeholders gave an average satisfaction rating of 6.3/10 to describe their relationship with CASA, representing a similar result to that observed in 2018 (6.2 average rating).
- + Although there is scope to further improve this rating, maintaining a similar score to 2018 is a reasonable result given the significant disruption that COVID-19 had on the aviation industry in 2020.
- + Stakeholders were largely positive in their assessment of CASA's efforts to support Australian aviation through COVID-19, and were grateful in particular for extensions on medicals and license renewals.



## SATISFACTION WITH CASA'S SERVICE DELIVERY HAS FALLEN SLIGHTLY SINCE 2018

- + The average satisfaction rating given to CASA's service delivery was only 6.0/10 in 2020 (slightly lower than 6.2 in 2018). Although 49% of stakeholders in 2020 were 'satisfied' or 'very satisfied' with CASA's service delivery, this was a significant decrease from the 54% observed in 2018.
- + Satisfaction with CASA's staff performance (based on their most recent interaction) also decreased slightly across a number of areas compared to the 2018 results including the ability of staff to be helpful, understand their issue, provide advice that answered their query or was consistent with previous information given, and processing issues in a timely manner.



## EASE OF COMPLYING WITH REGULATIONS HAMPERED BY LACK OF CLEAR AND SUCCINCT DIRECTIONS

- + There continues to be low agreement that CASA explains aviation regulations and how they affect industry stakeholders in a clear and succinct manner (5.5/10 on average in 2020 vs. 5.2 in 2018).
- + Stakeholders also provided a relatively low score for the ease of complying with all aviation safety regulations which are relevant to their role or activities (6.3/10 on average in 2020 vs 5.9 in 2018).
- + Despite these challenges, most stakeholders feel they have a sound understanding of all regulations governing their aviation activities (7.0/10 average agreement in 2020).

# KEY FINDINGS



CASA'S AUDITING ROLE IS COMMONLY VIEWED AS CRITICAL TO THE SAFETY OF AVIATION IN AUSTRALIA

- + Those who have been subject to a CASA audit in the past two years shared strong agreement that 'CASA's auditing role is critical to the safety of aviation in Australia' (45% strongly agree) and that 'CASA staff undertake audit activities in a professional manner' (41% strongly agree).
- + From the depth interviews, there was a feeling of fear when it comes to being inspected by CASA given a perception that inspectors will commonly impose more unexpected barriers and administration work on them to do business.
- + CASA should continue education efforts and share de-identified examples of areas where audits have shown a stakeholder to be less than fully compliant – including specific actions or remedies to address such compliance shortfalls.



CONSISTENCY OF DECISION MAKING REMAINS A KEY AREA FOR IMPROVEMENT

- + Satisfaction with the consistency of CASA's decision making remains low (5.4/10 on average in both 2020 and 2018), with just a third (33%) of stakeholders agreeing that CASA staff are consistent in how they make decisions.
- + The inconsistency of advice provided by CASA was also a significant theme during the depth interviews. These stakeholders found that different offices or staff would provide different answers to the same question – even for regulatory matters which should (by nature) be clearly defined.
- + It was suggested that CASA offices and staff operating on-the-ground need to have a closer relationship with those setting policy (with training provided to be kept informed and up to date on this).



STAKEHOLDERS CONTINUE TO FEEL THAT THERE IS LIMITED DIALOGUE / CONSULTATION WITH INDUSTRY

- + Stakeholders maintain low satisfaction with CASA's performance in terms of ongoing dialogue with industry (5.5/10 average in 2020 vs 5.6 in 2018).
- + This coincided with significant decreases observed for the statements 'my input to regulation and reform would be useful to CASA' (6.7/10 vs 7.1 in 2018) and 'feeling like my contribution would be used to make real change' (6.8/10 vs 7.6 in 2018).
- + The depth interviews with stakeholders also highlighted that genuine two-way dialogue requires a commitment to listen and actively consider industry perspectives on any matter – not just the sharing of decisions already made.

# 01

## OVERALL SATISFACTION

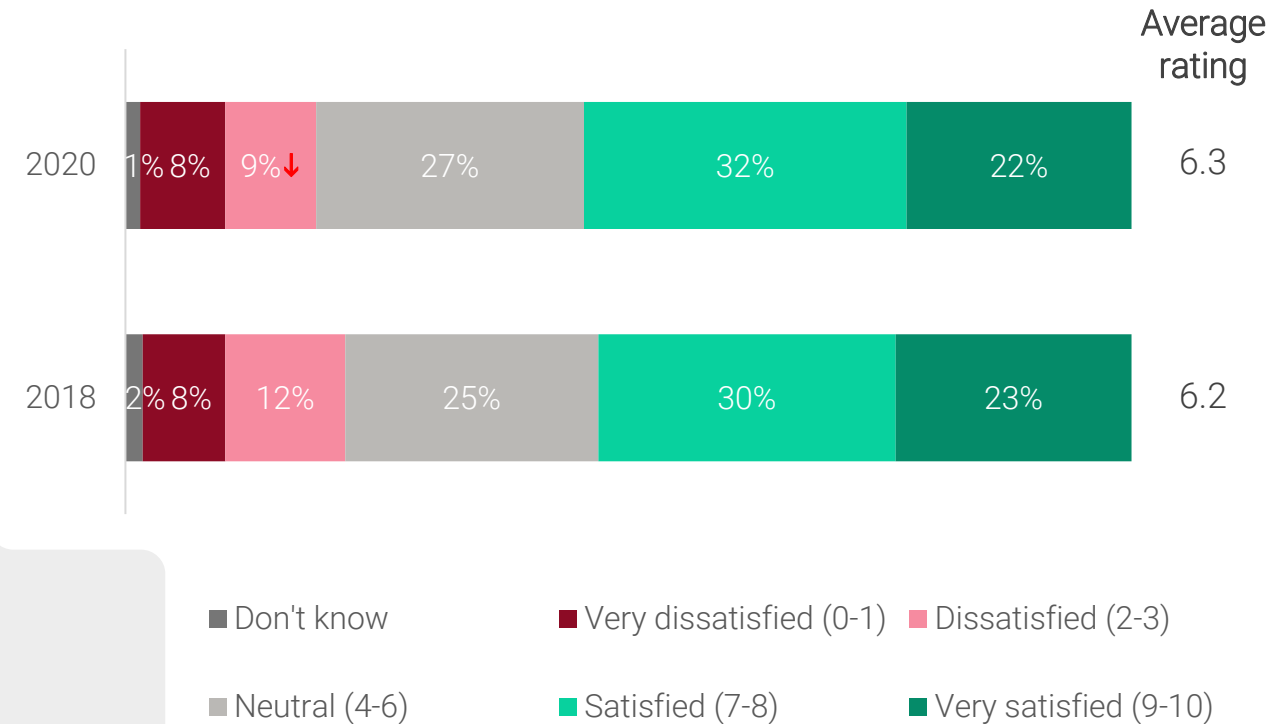
 ONLINE SURVEY FINDINGS



# OVERALL SATISFACTION WITH CASA LARGELY UNCHANGED FROM 2018

- + In 2020, stakeholders gave an average rating of 6.3 (out of 10) to describe how satisfied they were with their relationship to CASA.
- + This was virtually unchanged from the 6.2 average rating observed in 2018.
- + Although there is significant scope to further improve this average overall satisfaction rating, maintaining a similar result to 2018 in the context of COVID-19 (and its impact on the aviation industry) is clearly a reasonable outcome.

## SATISFACTION WITH YOUR RELATIONSHIP WITH CASA

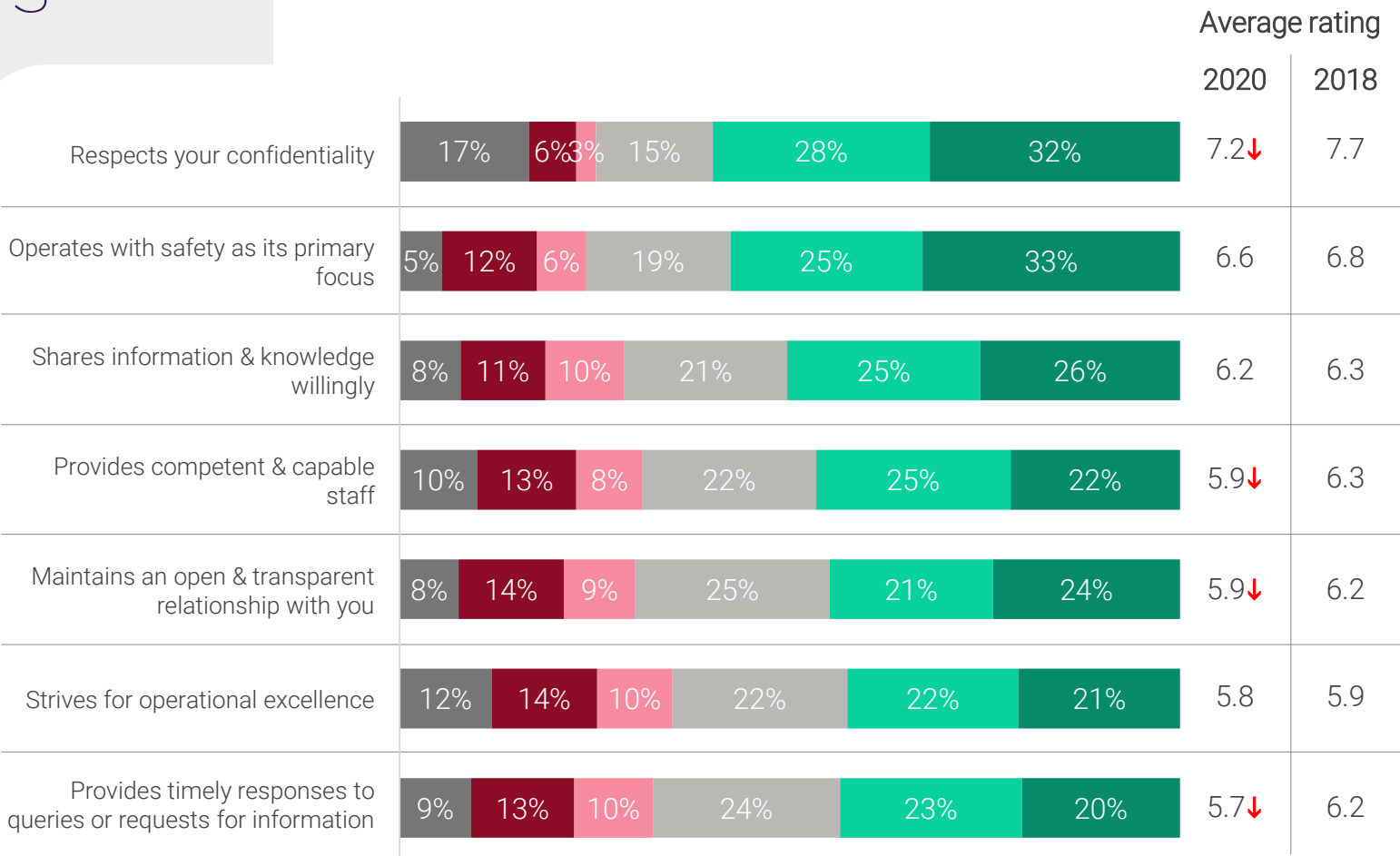


# LOWER SATISFACTION OBSERVED ACROSS SEVERAL SPECIFIC ASPECTS OF CASA PERFORMANCE

- + Stakeholders were asked to rate their satisfaction across specific aspects of CASA’s performance.
- + Although most respondents were satisfied with CASA’s performance in respecting their confidentiality (7.2 on average), this score has decreased significantly since 2018 (7.7).
- + Several other aspects also saw significantly lower satisfaction (on average) in 2020, including:
  - Provides competent & capable staff (5.9 vs 6.3 in 2018);
  - Maintains an open & transparent relationship with you (5.9 vs 6.2 in 2018); and
  - Provides timely responses to queries or request for information (5.7 vs. 6.2 in 2018).

## SATISFACTION WITH ASPECTS OF CASA’S PERFORMANCE

PART 1 OF 3



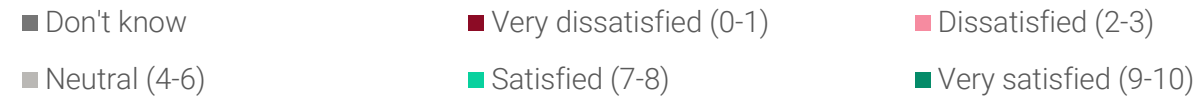
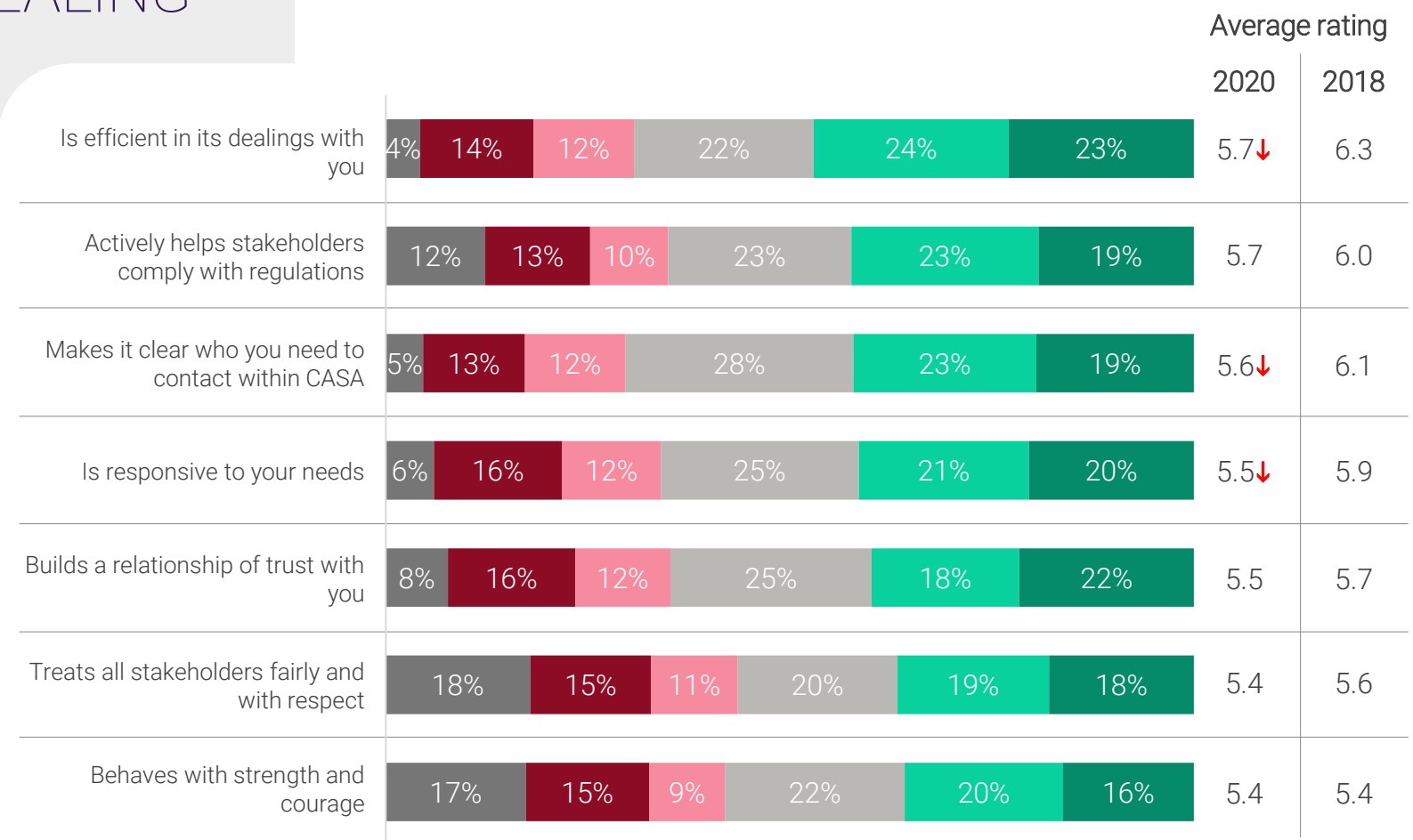
QA3. On a scale of 0 to 10, where 0 is 'very dissatisfied' and 10 is 'very satisfied', please rate how satisfied you are with the following aspects of CASA's performance.  
 Base: All respondents; 2018 (n=1,168), 2020 (n=755)

# LOWER SATISFACTION ALSO OBSERVED FOR CASA'S EFFICIENCY & RESPONSIVENESS IN DEALING WITH THEIR NEEDS

- + Continuing the pattern from the previous slide, several more factors also saw a significant decrease in satisfaction (on average) in 2020, including:
  - Is efficient in its dealings with you (5.7 vs. 6.3 in 2018);
  - Makes it clear who you need to contact within CASA (5.6 vs. 6.1 in 2018); and
  - Is responsive to your needs (5.5 vs. 5.9 in 2018).
- + These findings show that CASA needs to continue to focus on improving performance across these areas.

## SATISFACTION WITH ASPECTS OF CASA'S PERFORMANCE

PART 2 OF 3



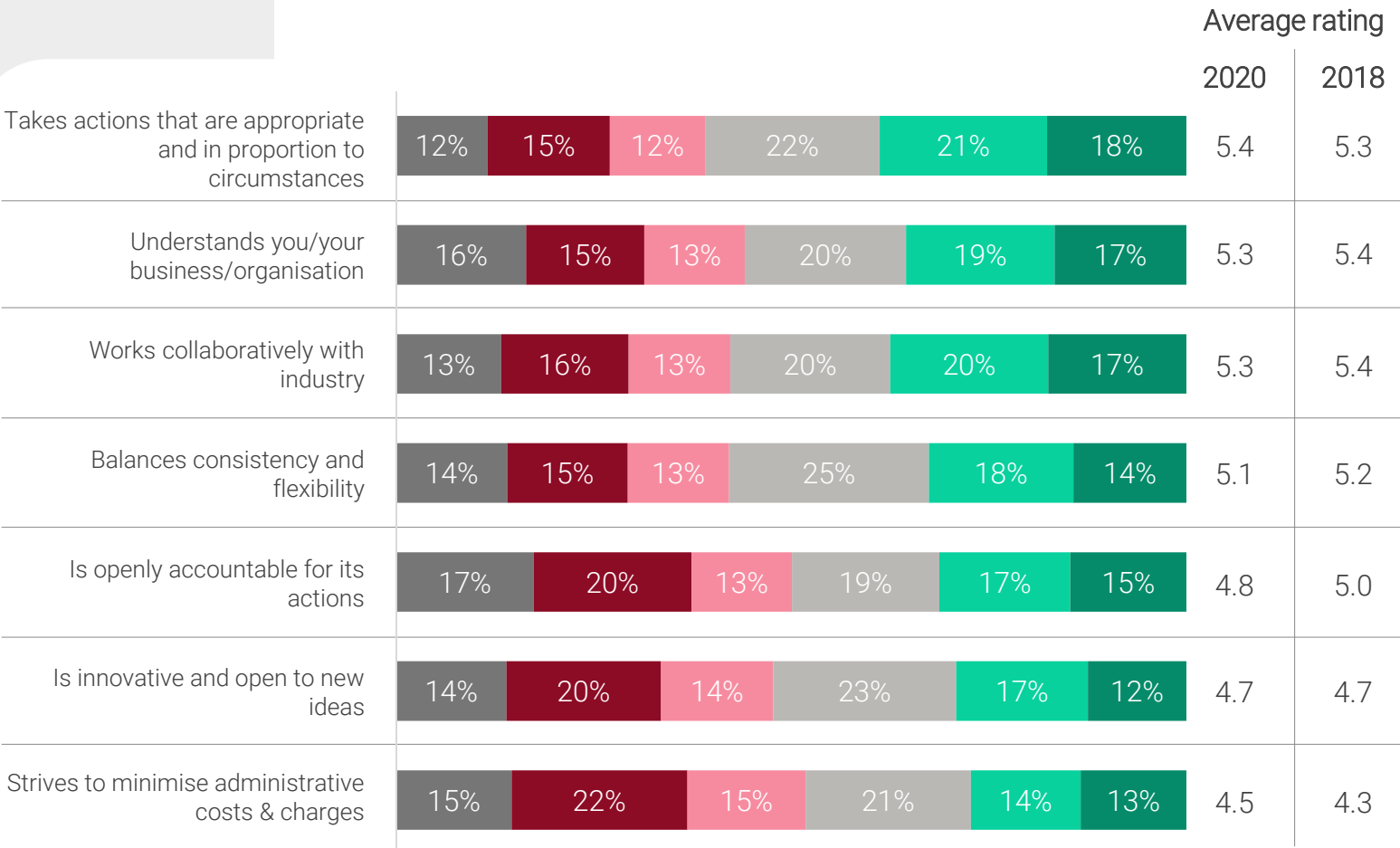
QA3. On a scale of 0 to 10, where 0 is 'very dissatisfied' and 10 is 'very satisfied', please rate how satisfied you are with the following aspects of CASA's performance.  
Base: All respondents; 2018 (n=1,168), 2020 (n=755)

# LOW PERCEPTIONS THAT CASA STRIVES TO MINIMISE COSTS OR IS INNOVATIVE AND OPEN TO NEW IDEAS

+ As observed in previous years, lowest areas of satisfaction were observed for CASA’s performance in striving to minimise administrative costs & charges (4.5 in 2020) and being innovative and open to new ideas (4.7 in 2020).

## SATISFACTION WITH ASPECTS OF CASA’S PERFORMANCE

PART 3 OF 3



■ Don't know

■ Neutral (4-6)

■ Very dissatisfied (0-1)

■ Satisfied (7-8)

■ Dissatisfied (2-3)

■ Very satisfied (9-10)

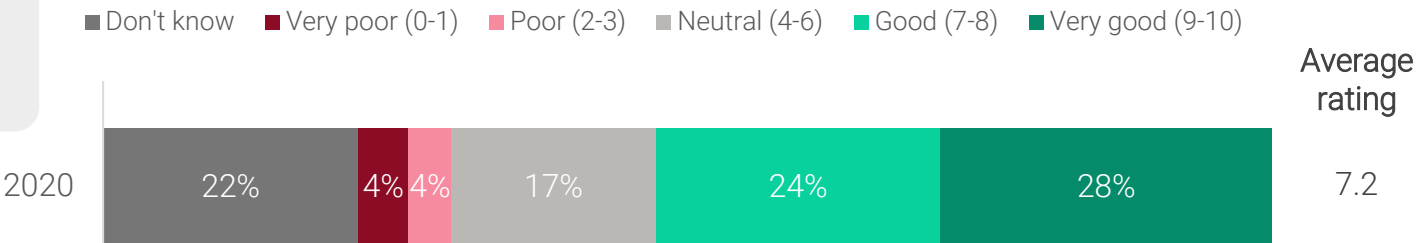
QA3. On a scale of 0 to 10, where 0 is 'very dissatisfied' and 10 is 'very satisfied', please rate how satisfied you are with the following aspects of CASA's performance.  
Base: All respondents; 2018 (n=1,168), 2020 (n=755)



# CASA'S RESPONSE TO SUPPORTING AUSTRALIAN AVIATION DURING COVID-19 HAS BEEN VIEWED FAVOURABLY

- + A new question was added into the 2020 survey to ask stakeholders how they would rate CASA's COVID-19 response in terms of supporting Australian aviation through this very challenging period.
- + Encouragingly, most stakeholders were positive about CASA's performance during this period with 28% very satisfied and 24% satisfied, compared to just 8% who were dissatisfied or very dissatisfied.
- + Around one in five (22%) answered don't know – likely reflecting their limited awareness of CASA's actions (and/or their involvement in the industry) during this period.

## RATING CASA'S RESPONSE TO SUPPORTING AUSTRALIAN AVIATION DURING COVID-19



"Providing small extensions to already over the top restrictions is not getting aircraft back in the air or saving an operator much money."  
(2 rating)

"CASA has shown some flexibility with respect to operation of aircraft, medicals and flight reviews. That flexibility was not unreasonable but CASA ought to apply the same flexibility under a 'business as usual' scenario as well."  
(6 rating)

"Well, you made exemptions to things like doing your medical and flight reviews but then you make us build our own system of using it, which was too hard for my company. so it was good for big companies but no good for us."  
(5 rating)

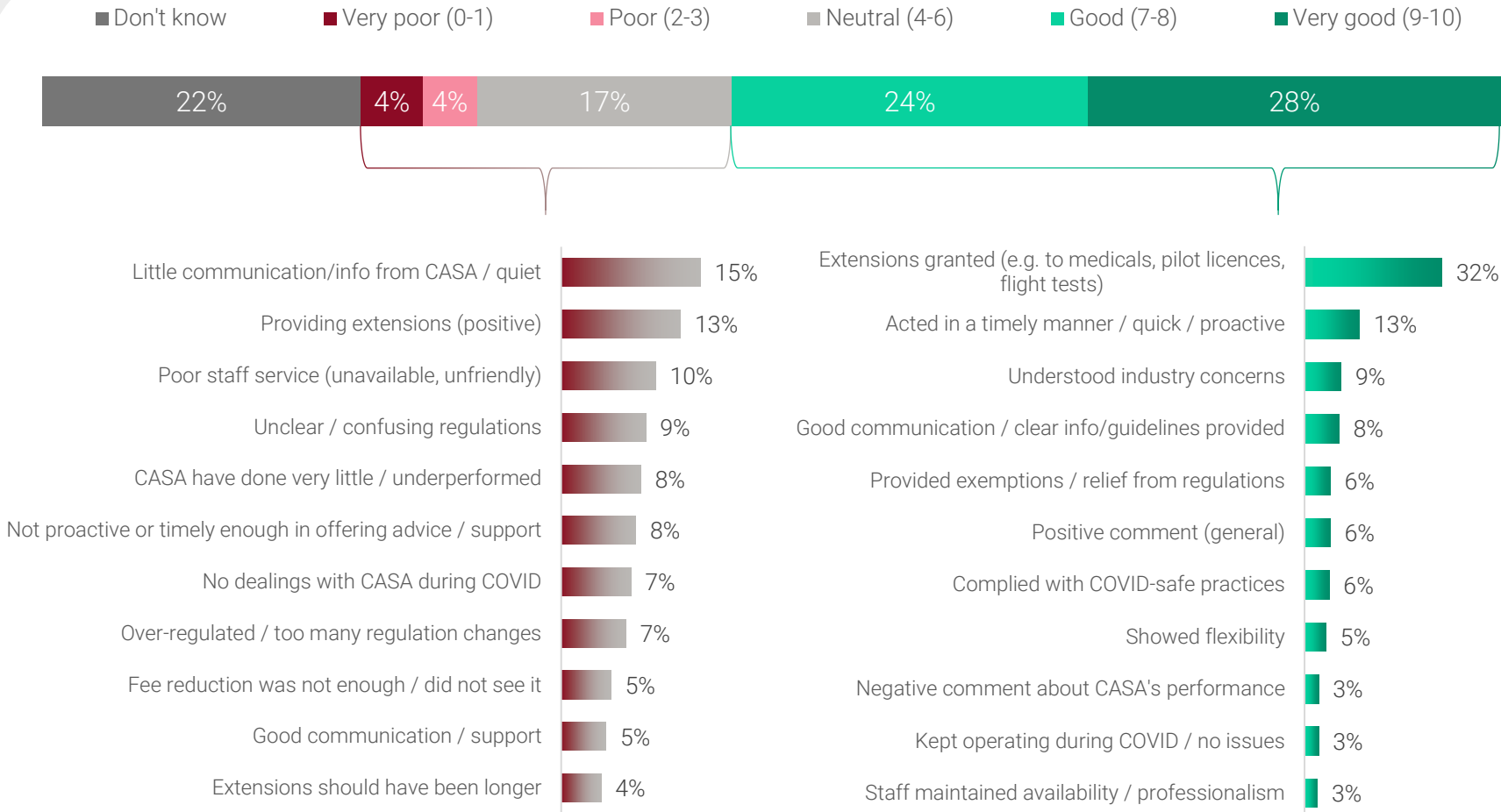
"Extensions have been realistic and helpful. They have been communicated well to both operators and pilots."  
(8 rating)

QA4. On a scale of 0 to 10 where 0 is very poor and 10 is very good, how do you rate CASA's response to COVID-19 in terms of supporting Australian aviation through this challenging period?  
Base: All respondents; 2020 (n=755)

# EXTENSIONS PROVIDED TO MEDICALS & LICENCING RENEWALS DURING COVID-19 WELL-RECEIVED

- + In an open-ended question, stakeholders were asked to explain their rating of CASA's response to supporting Australian aviation during COVID-19.
- + Those who felt positive (i.e. rating a 7 or higher) about CASA's response commonly highlighted the extensions to medical and pilot licences which were granted.
  - Those who have had the most contact with the Sydney region (Sydney & Tamworth offices) in the past six months were significantly more likely to answer 'provided exemptions / relief from regulations' (17%).
- + In comparison, those who rated CASA's response as neutral or poor felt that CASA was quiet in providing information (15%), and were also critical of staff being uncongenial, unhelpful and hard to contact (due to the disruptions of working from home).

## REASONS FOR RATING CASA'S RESPONSE TO COVID-19 AS POOR/NEUTRAL/GOOD



QA4. On a scale of 0 to 10 where 0 is very poor and 10 is very good, how do you rate CASA's response to COVID-19 in terms of supporting Australian aviation through this challenging period?

QA5. Why is that?

Base: All respondents; 2020 (n=755)

# 02

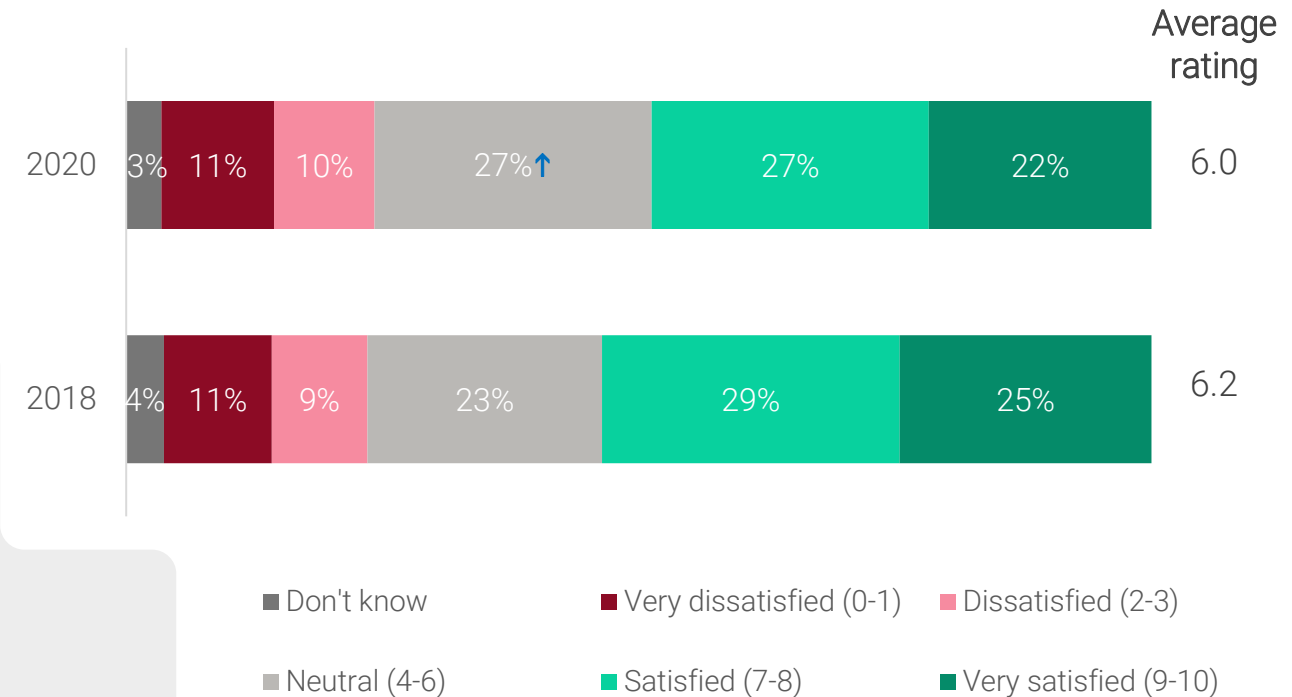
## SERVICE DELIVERY

 ONLINE SURVEY FINDINGS

# AROUND 1 IN 2 FEEL SATISFIED WITH CASA'S SERVICE DELIVERY

- + Using a 0-10 scale, stakeholders were asked to rate their satisfaction with CASA's service delivery.
- + The average rating in 2020 was 6.0, slightly lower than the 6.2 recorded in 2018.
- + Only around one in five feel dissatisfied or very dissatisfied with CASA's service delivery (21% in 2020, similar to 20% in 2018).

## SATISFACTION WITH CASA'S SERVICE DELIVERY

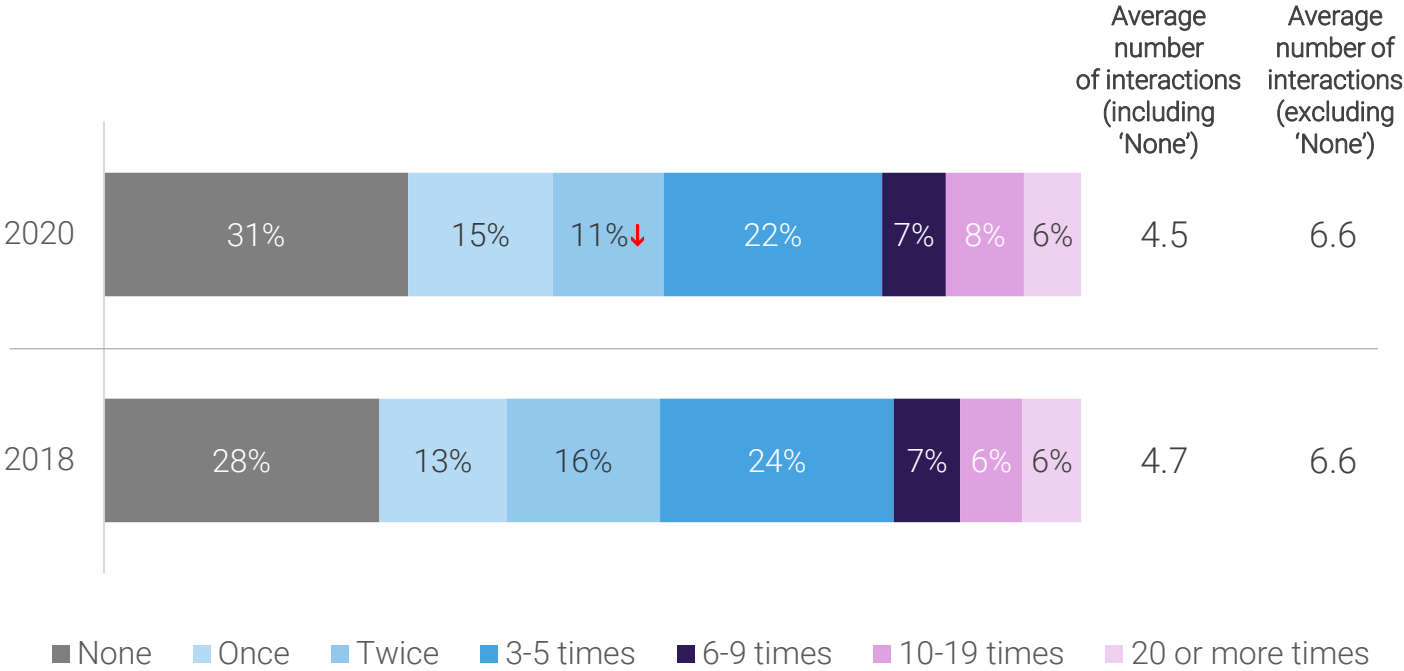




# FREQUENCY OF CONTACT WITH CASA STAFF IN THE PAST 12 MONTHS AT A SIMILAR LEVEL TO 2018

- + Respondents were asked to number how many times they have had direct contact with CASA staff in the past 12 months.
- + Around one in three have not had any contact with CASA staff (31%), this was significantly more likely to include:
  - Those who have been in the aviation industry for 3 years or less (46%);
  - Primary role in sector is a recreational pilot or private pilot (47%); and
  - Primary role in sector involves remotely piloted aircraft systems (48%).
- + In contrast, chief pilots were significantly less likely to have had no contact with CASA in the past 12 months (6%).
- + Among those who had contacted CASA in the past 12 months, the average number of interactions they had with CASA in this period was 6.6 – matching the result from 2018.

NUMBER OF INTERACTIONS WITH CASA STAFF IN THE PAST 12 MONTHS

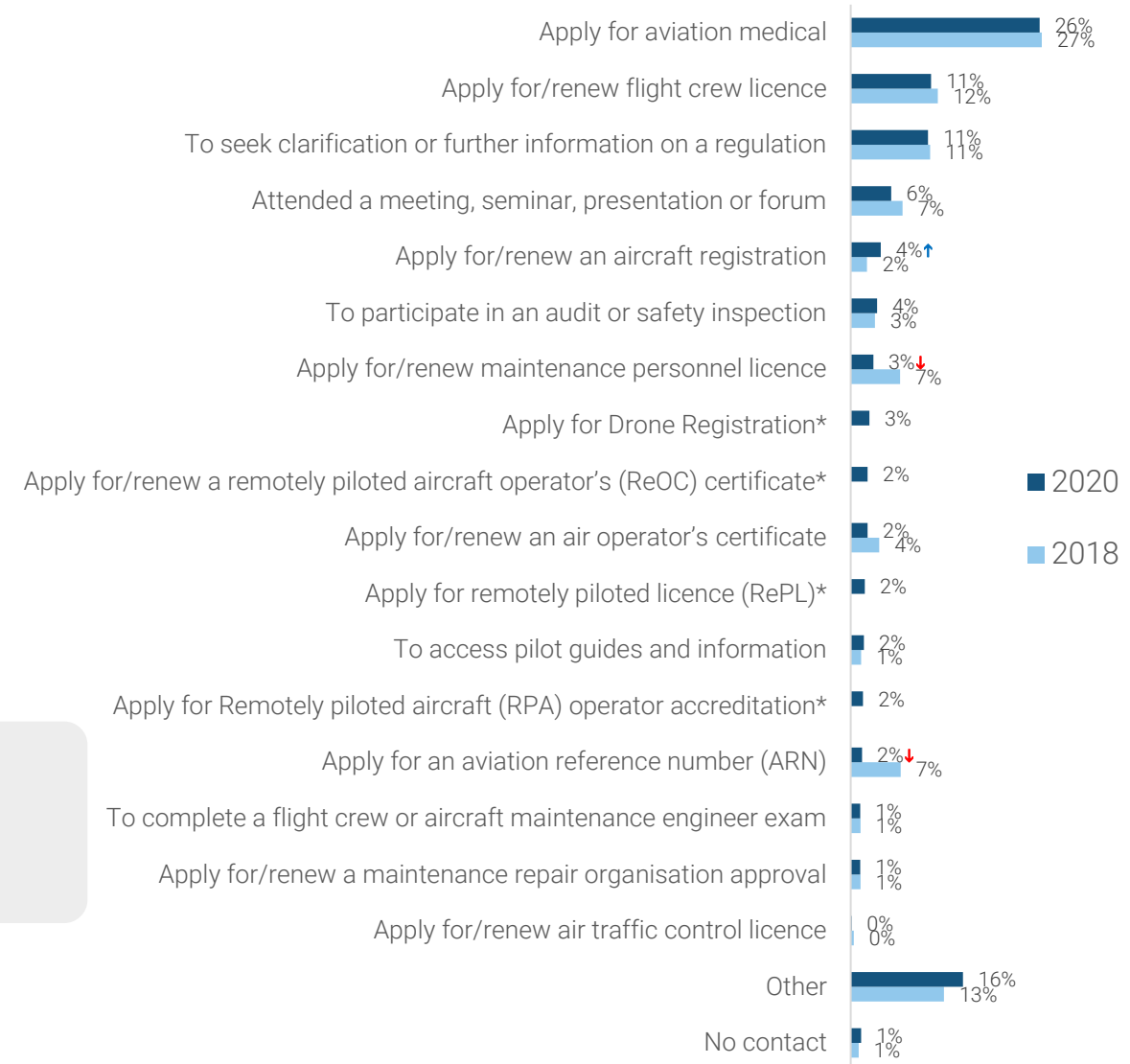


QD2. How many times have you had direct contact with CASA staff over the past 12 months?  
 Base: All respondents\*; 2018 (n=1,163), 2020 (n=751)  
 \*Note: Respondents who provided a value over '100' were not included in this analysis.

# APPLYING FOR AN AVIATION MEDICAL MOST COMMON DRIVER FOR CONTACTING CASA STAFF

- + All stakeholders were asked to recount what their most recent interaction with CASA staff was in relation to.
- + Similarly to 2018 results, the most common reason for interacting with CASA was to apply for an aviation medical (26% in 2020).
- + A significantly lower proportion of stakeholders in 2020 had interacted with CASA most recently to apply for/renew a maintenance personnel licence (3% vs 7% in 2018) and to apply for an aviation reference number (2% vs 7% in 2018).

## REASON FOR MOST RECENT INTERACTION WITH CASA STAFF

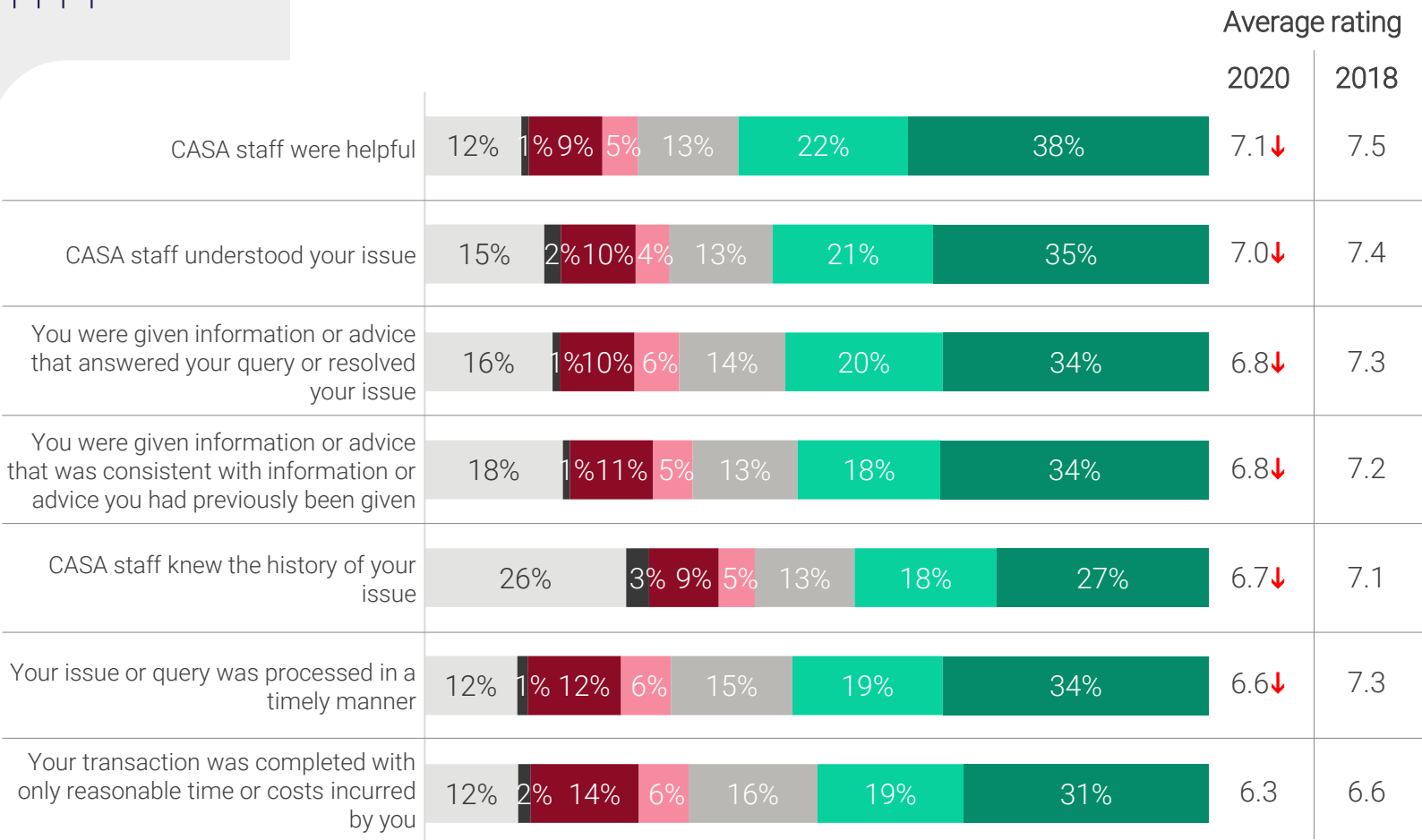


QD3. What was your most recent direct contact with CASA staff in relation to?  
Base: All respondents; 2018 (n=1,168), 2020 (n=755)

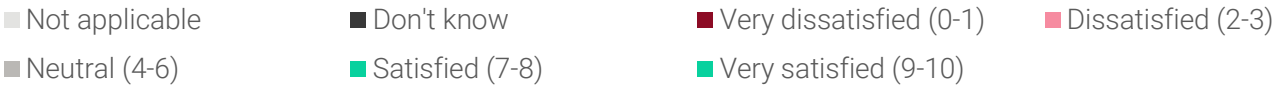
# LOWER SATISFACTION ACROSS MOST ASPECTS OF RECENT INTERACTIONS WITH CASA STAFF

- + Stakeholders were asked to rate how satisfied they were with the performance of CASA staff from their most recent interaction.
- + Across each of the metrics, there is a positive skew to feeling more satisfied – reflected in average ratings ranging from 6.3 to 7.1.
- + However, most of these average ratings have decreased significantly from the 2018 results – suggesting that the quality of interactions with CASA staff requires review and improvement.

## SATISFACTION WITH MOST RECENT INTERACTION



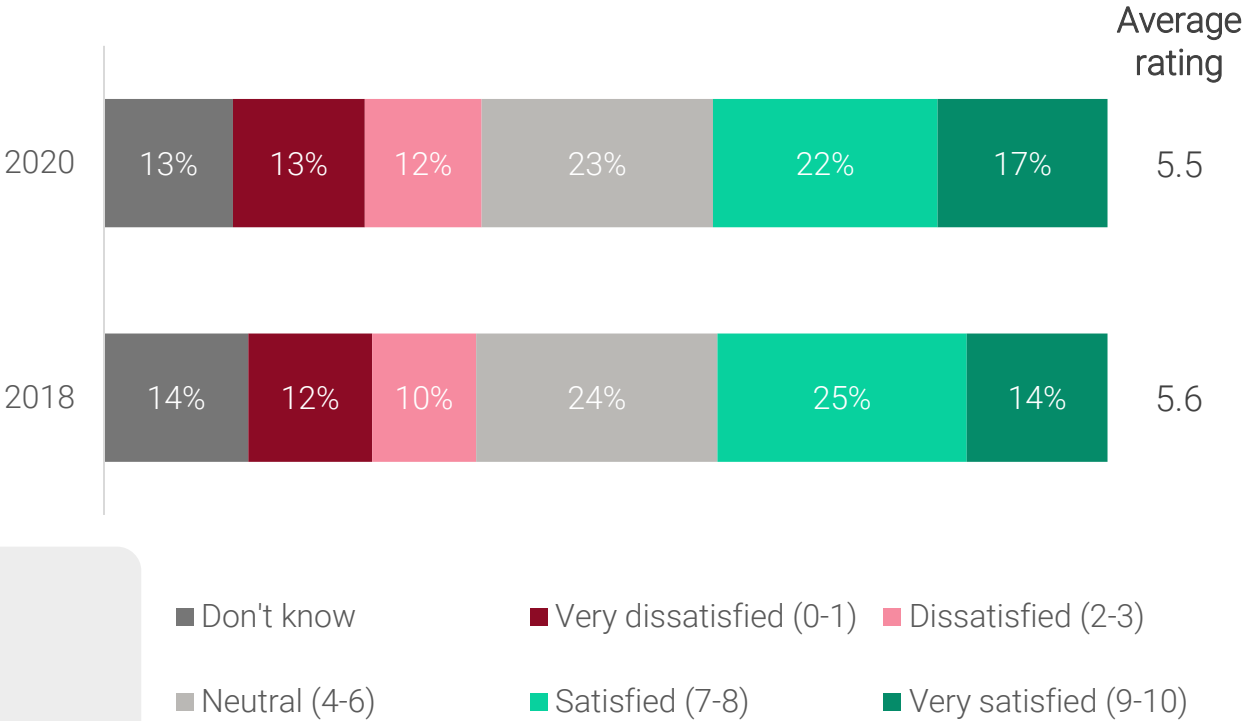
QD4. On a scale of 0 to 10, where 0 is 'very dissatisfied' and 10 is 'very satisfied', please rate how satisfied you were during your most recent interaction with CASA staff that....  
Base: All respondents; 2018 (n=1,168), 2020 (n=755)



# MIXED VIEWS ON CASA'S ONGOING DIALOGUE WITH INDUSTRY

- + Stakeholders were asked to rate their satisfaction with CASA's ongoing dialogue with industry using a 0-10 satisfaction scale.
- + In 2020, 39% felt satisfied/very satisfied with CASA's ongoing dialogue with industry, leaving a reasonable proportion who felt neutral (23%) or dissatisfied/very dissatisfied (25%).
- + Results were similar between 2018 and 2020, with just a slight decrease observed for the average rating from 5.6 in 2018 to 5.5 in 2020.

## SATISFACTION WITH CASA'S ONGOING DIALOGUE WITH INDUSTRY



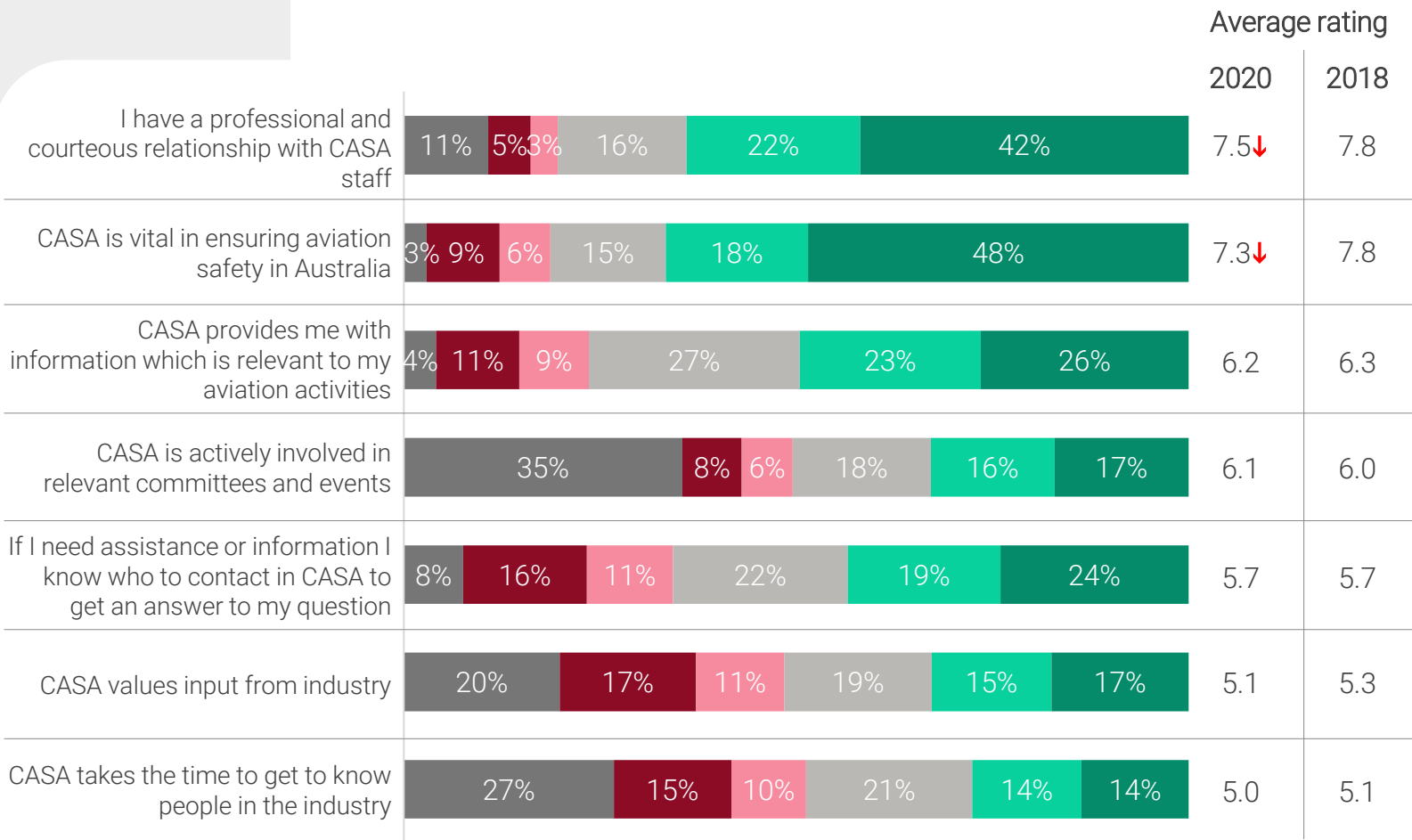
QH1. On a scale of 0 to 10 where 0 is 'very dissatisfied' and 10 is 'very satisfied', how satisfied are you with CASA's ongoing dialogue with industry?  
 Base: All respondents; 2018 (n=1,168), 2020 (n=755)



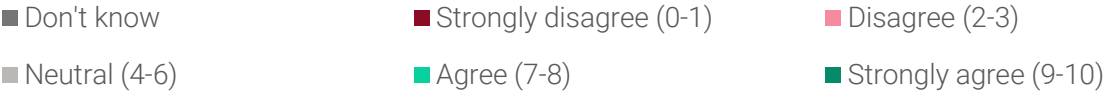
# JUST 1 IN 4 FEEL CASA TAKES THE TIME TO GET TO KNOW PEOPLE IN THE INDUSTRY

- Stakeholders were asked to rate their agreement with a series of statements relating to CASA's ongoing dialogue with industry.
- Although close to half (48%) of stakeholders strongly agree that 'CASA is vital in ensuring aviation safety in Australia', there was a significant decrease in the average rating for this statement in 2020 (7.3) compared to 2018 (7.8).
- The statement 'CASA takes the time to get to know people in the industry' continues to attract the lowest level of agreement – recording an average rating of 5.0 in 2020.

## RATING ELEMENTS OF CASA'S ONGOING DIALOGUE WITH INDUSTRY



QH2. On a scale of 0 to 10, where 0 is 'strongly disagree' and 10 is 'strongly agree', please indicate your level of agreement with the following statements.  
Base: All respondents; 2018 (n=1,168), 2020 (n=755)



# 03

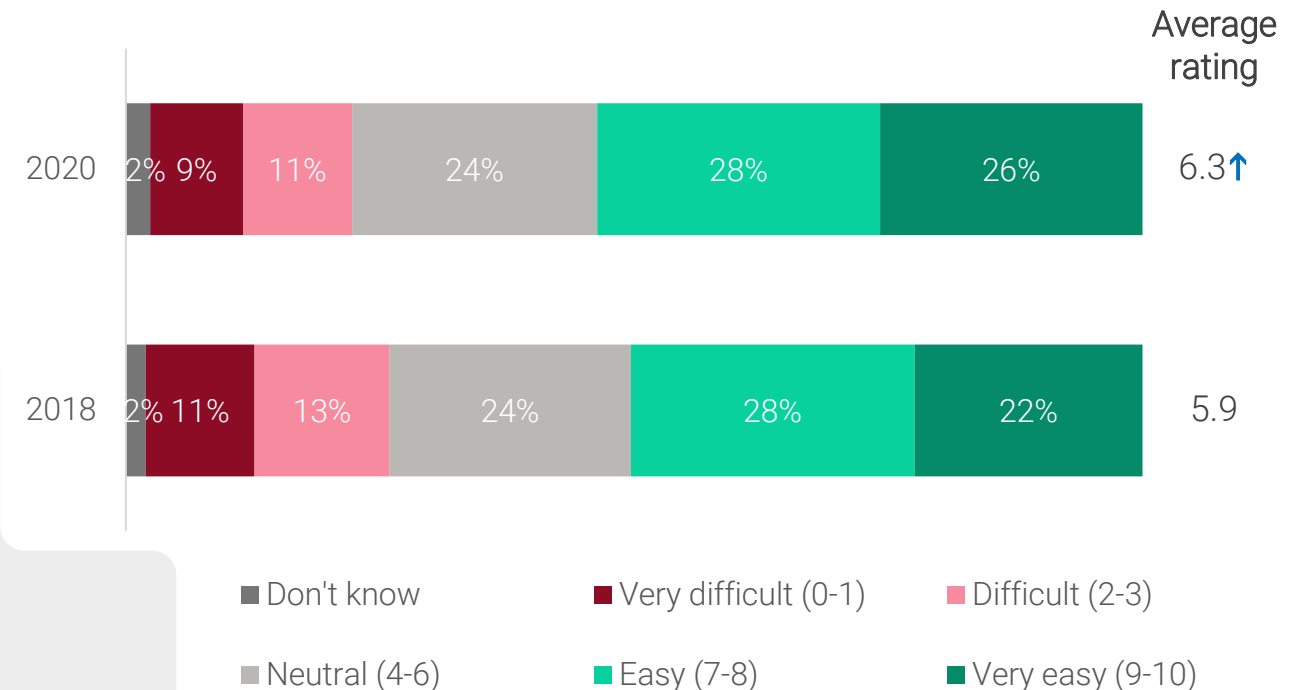
## COMPLIANCE & AUDIT PERFORMANCE

 ONLINE SURVEY FINDINGS

# IMPROVED VIEW THAT COMPLYING WITH AVIATION SAFETY REGULATIONS IS EASY – BUT SCOPE FOR IMPROVEMENT

- + Stakeholders were asked to rate how easy or difficult it is to fully comply with all aviation safety regulations relevant to their role or activities.
- + Stakeholders in 2020 provided an average rating of 6.3 (out of 10) – representing a significantly higher result from 5.9 in 2018.
- + Although an average rating of 6.3 suggests there is still clear room to improve in this area, it is encouraging to see this score moving in a positive direction.

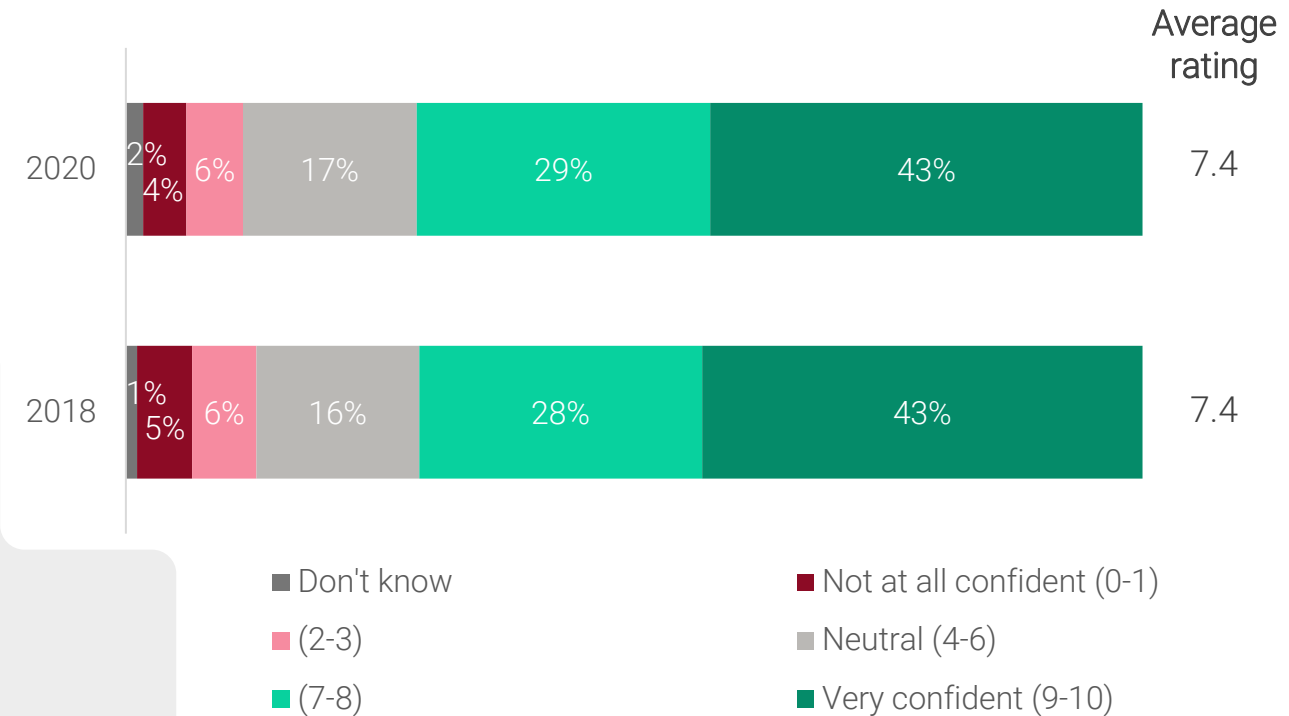
## EASE OF COMPLYING WITH ALL AVIATION SAFETY REGULATIONS RELEVANT TO YOUR ROLE OR ACTIVITIES



# CONFIDENCE IN ABILITY TO COMPLY WITH ALL AVIATION SAFETY REGULATIONS HAS REMAINED STABLE

- + Stakeholders were asked to rate how confident they are in their ability to comply with all aviation safety regulations relevant to their role.
- + On a positive note, most stakeholders appear to be confident – reflected by an average rating of 7.4 in 2020.
- + This result is consistent with 2018 which also recorded an average rating of 7.4.

## CONFIDENCE IN ABILITY TO COMPLY WITH ALL AVIATION SAFETY REGULATIONS RELEVANT TO YOUR ROLE

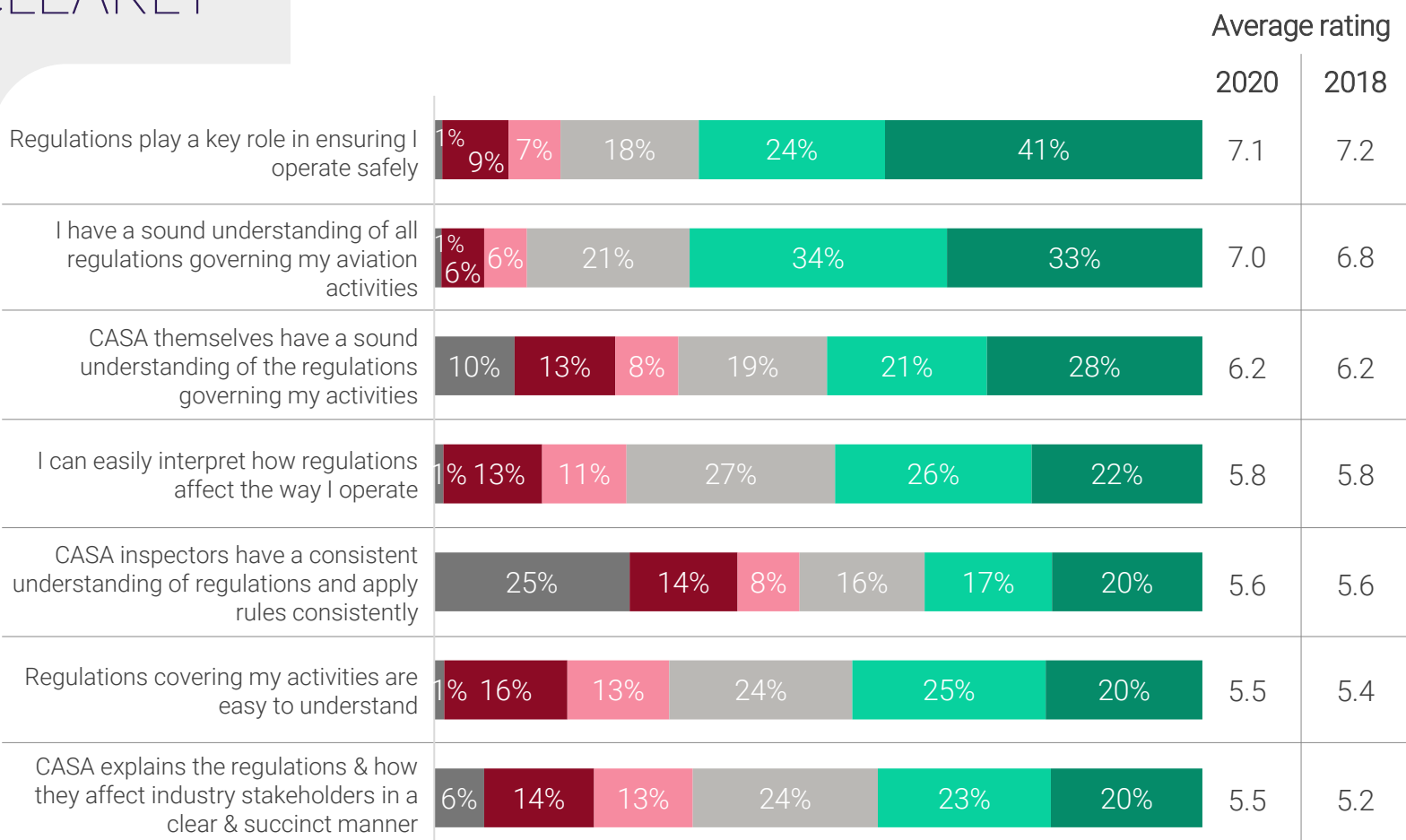




# STAKEHOLDERS FEEL LIKE THEY UNDERSTAND REGULATIONS... BUT DON'T CREDIT CASA FOR CLEARLY EXPLAINING THEM

- + Stakeholders were asked to rate their level of agreement with a series of statements relating to compliance of aviation safety regulations.
- + Encouragingly, most stakeholders agree that regulations play a key a role in ensuring they operate safely (7.1 on average) and there was also strong agreement that they understand all the regulations which govern their aviation activities (7.0 on average).
- + Despite claiming to have a sound understanding of these regulations, there is comparatively lower agreement that CASA explains these regulations in a manner which is clear and succinct (5.5 on average) – suggesting significant scope for further improvement in this area.

## AGREEMENT WITH COMPLIANCE STATEMENTS



QB3. On a scale of 0 to 10, where 0 is 'strongly disagree' and 10 is 'strongly agree', please indicate your level of agreement with the following statements.  
Base: All respondents; 2018 (n=1,168), 2020 (n=755)

■ Don't know

■ Strongly disagree (0-1)

■ Disagree (2-3)

■ Neutral (4-6)

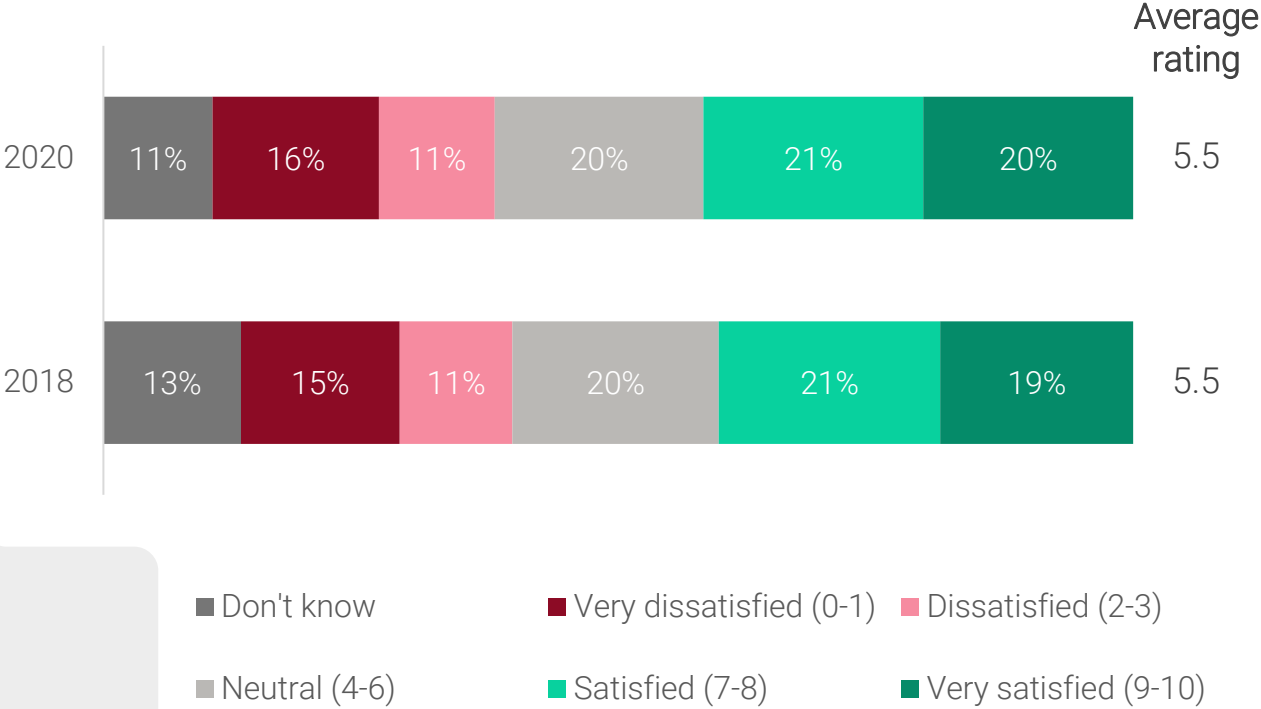
■ Agree (7-8)

■ Strongly agree (9-10)

# SATISFACTION WITH CASA'S DEVELOPMENT OF AVIATION SAFETY REGULATIONS OPEN FOR IMPROVEMENT

- + Stakeholders were asked to rate their satisfaction with how CASA develops aviation safety regulations.
- + This level of satisfaction ranges, with 42% of stakeholders in 2020 providing a rating of 7 or higher, compared to 27% who gave a rating of 3 or lower – culminating in an average rating of 5.5.
- + This result is on par with 2018 results (also recording a 5.5 average rating), suggesting that limited (to no) improvement has been observed in this area.

SATISFACTION WITH CASA'S DEVELOPMENT OF AVIATION SAFETY REGULATIONS



QE1. On a scale of 0 to 10 where 0 is 'very dissatisfied' and 10 is 'very satisfied', how satisfied are you with the ways CASA develops aviation safety regulations?  
 Base: All respondents; 2018 (n=1,168), 2020 (n=755)

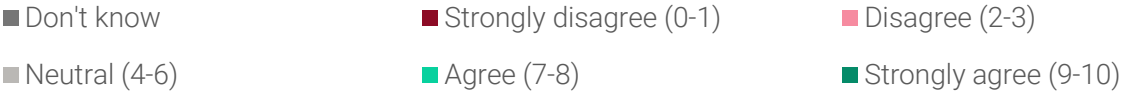
# 1 IN 2 FEEL LIKE THEIR INPUT TO REGULATION AND REFORM WOULD BE USEFUL TO CASA

- + Stakeholders were asked to rate their agreement with a series of statements about CASA's performance in developing aviation safety regulations.
- + There was a significant decrease in agreement that 'my input to regulation and reform would be useful to CASA', falling from an average of 7.1 in 2018 to 6.7 in 2020.
- + There continues to be low agreement that CASA always consults with appropriate industry persons to inform the development of these regulations (4.8 average in 2020).

## AGREEMENT WITH CASA'S PERFORMANCE TO DEVELOP AVIATION SAFETY REGULATIONS



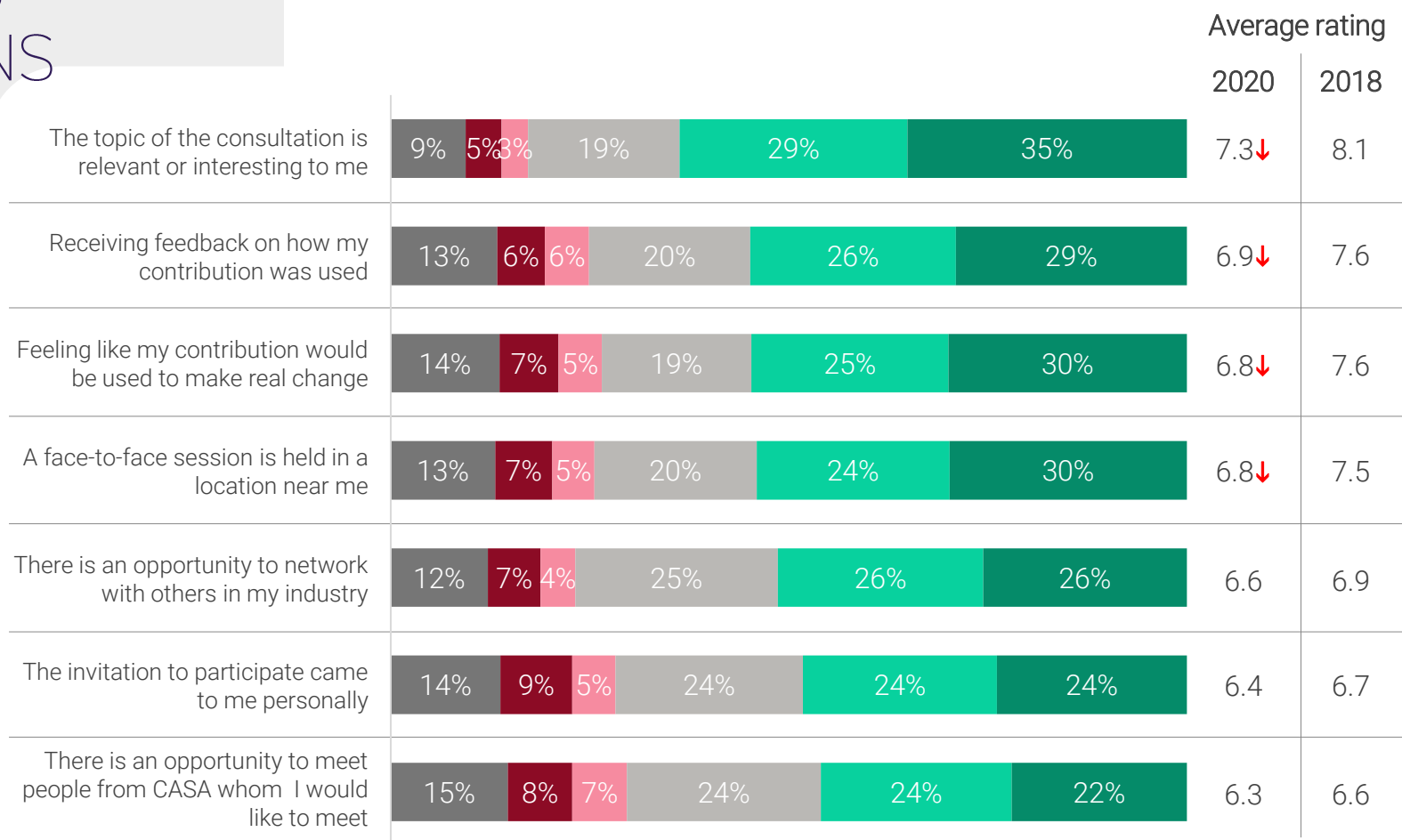
QE2. On a scale of 0 to 10, where 0 is 'strongly disagree' and 10 is 'strongly agree', please indicate your level of agreement with the following statements.  
Base: All respondents; 2018 (n=1,168), 2020 (n=755)



# CASA NEED TO SHOW HOW CONSULTATION IMPACTS POLICY, REGULATORY AND SERVICE DESIGN DECISIONS

- + Stakeholders were asked to rate how important various factors would be in encouraging them to participate in either face-to-face or written consultation with CASA.
- + Not surprisingly, a topic being of direct interest or relevance to them, receiving feedback on how their input was used, and having confidence that their contribution would contribute to real change remain the key factors most likely to motivate engagement with such consultation opportunities.
- + For CASA, these results show that consultation needs to be targeted & two-way, with an obligation to ensure those who participate are provided meaningful and timely feedback.

## IMPORTANCE OF FACTORS TO ENCOURAGE CONSULTATION WITH CASA



QE5. On a scale from 0 to 10, where 0 is 'very unimportant' and 10 is 'very important', how important would each of the following factors be in terms of encouraging you to participate in face-to-face or written consultation with CASA?  
Base: All respondents; 2018 (n=1,168), 2020 (n=755)

■ Don't know

■ Very unimportant (0-1)

■ Unimportant (2-3)

■ Neutral (4-6)

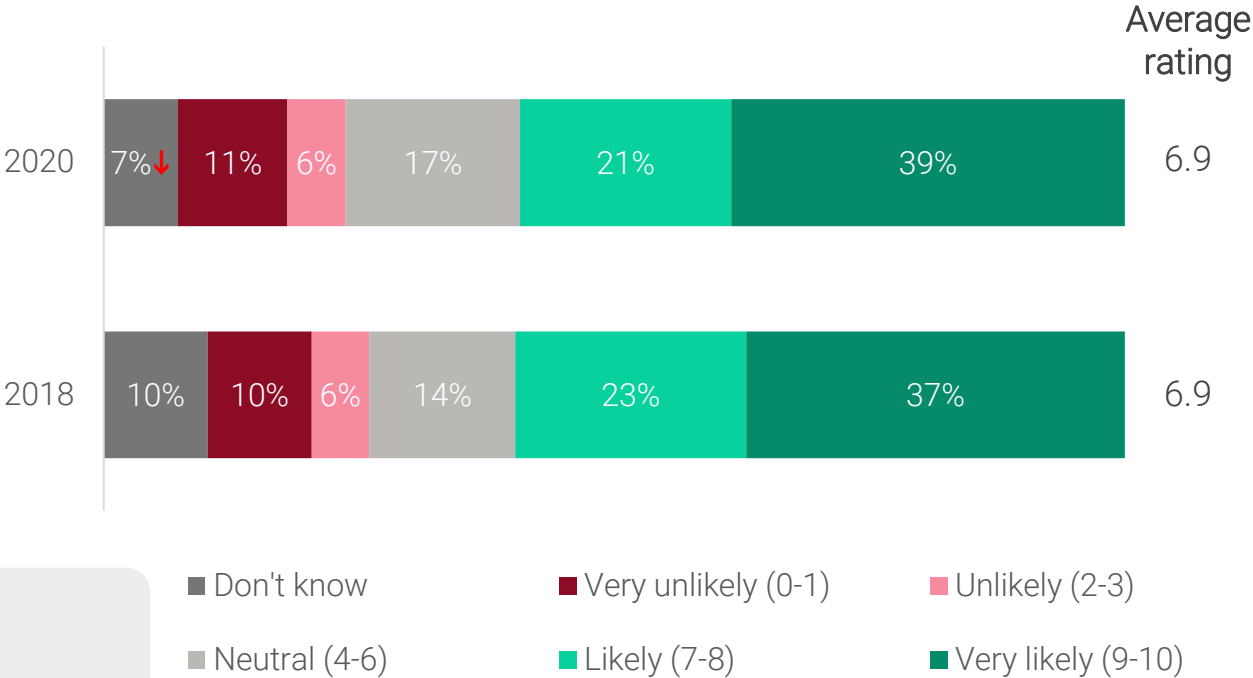
■ Important (7-8)

■ Very important (9-10)

# MOST STAKEHOLDERS WOULD BE LIKELY TO MAKE A VOLUNTARY SAFETY REPORT

- + Stakeholders were asked how likely they would be to make a voluntary safety report in situations of material non-compliance with safety regulations.
- + The majority of stakeholders (59%) indicated they would be likely or very likely to, compared to just 16% who would be unlikely or very unlikely.
- + The results from 2020 are broadly consistent with 2018, with the same average rating (6.9) observed in both years.
- + Aircraft owners and operators were significantly less likely to make a voluntary safety report (6.4) compared to those who are not an aircraft owner or operator of any kind (7.5).

LIKELIHOOD TO MAKE A VOLUNTARY SAFETY REPORT

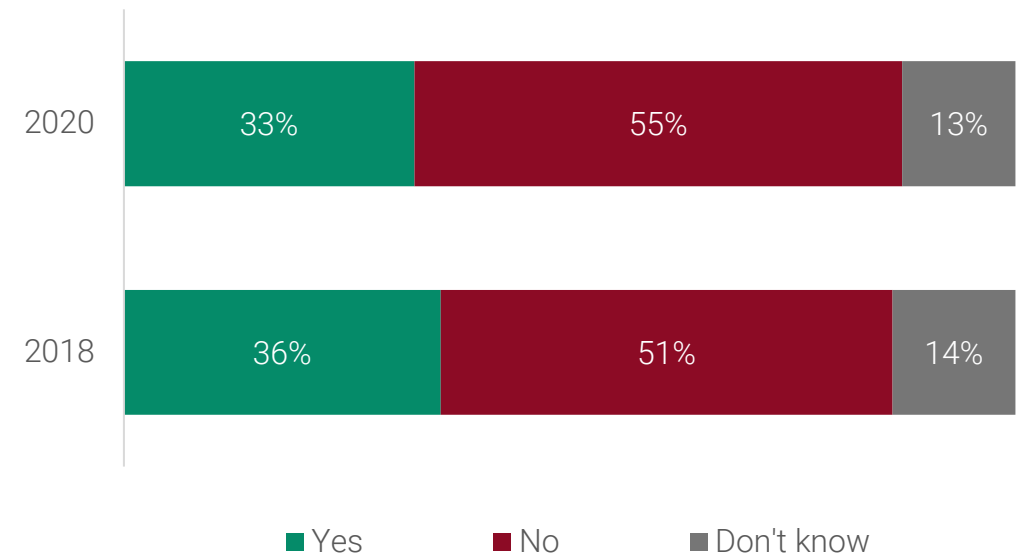


QG1. On a scale of 0 to 10, where 0 is 'very unlikely' and 10 is 'very likely', how likely would you be to make a voluntary safety report (e.g. alert CASA voluntarily in the case of non-compliance with your regulatory obligations) in situations of material non-compliance with safety regulations?  
 Base: All respondents; 2018 (n=1,168), 2020 (n=755)

# 1 IN 3 HAVE EXPERIENCED CASA AUDIT ACTIVITY IN THE PAST TWO YEARS

- + Stakeholders were asked if they or their organisation has been subject to any CASA audit activity over the past two years.
- + Similarly to 2018 results, around a third of stakeholders in 2020 reported being subject to a CASA audit activity in the past two years.

## HAVE YOU OR YOUR ORGANISATION BEEN SUBJECT TO ANY CASA AUDIT ACTIVITY IN THE PAST 2 YEARS?

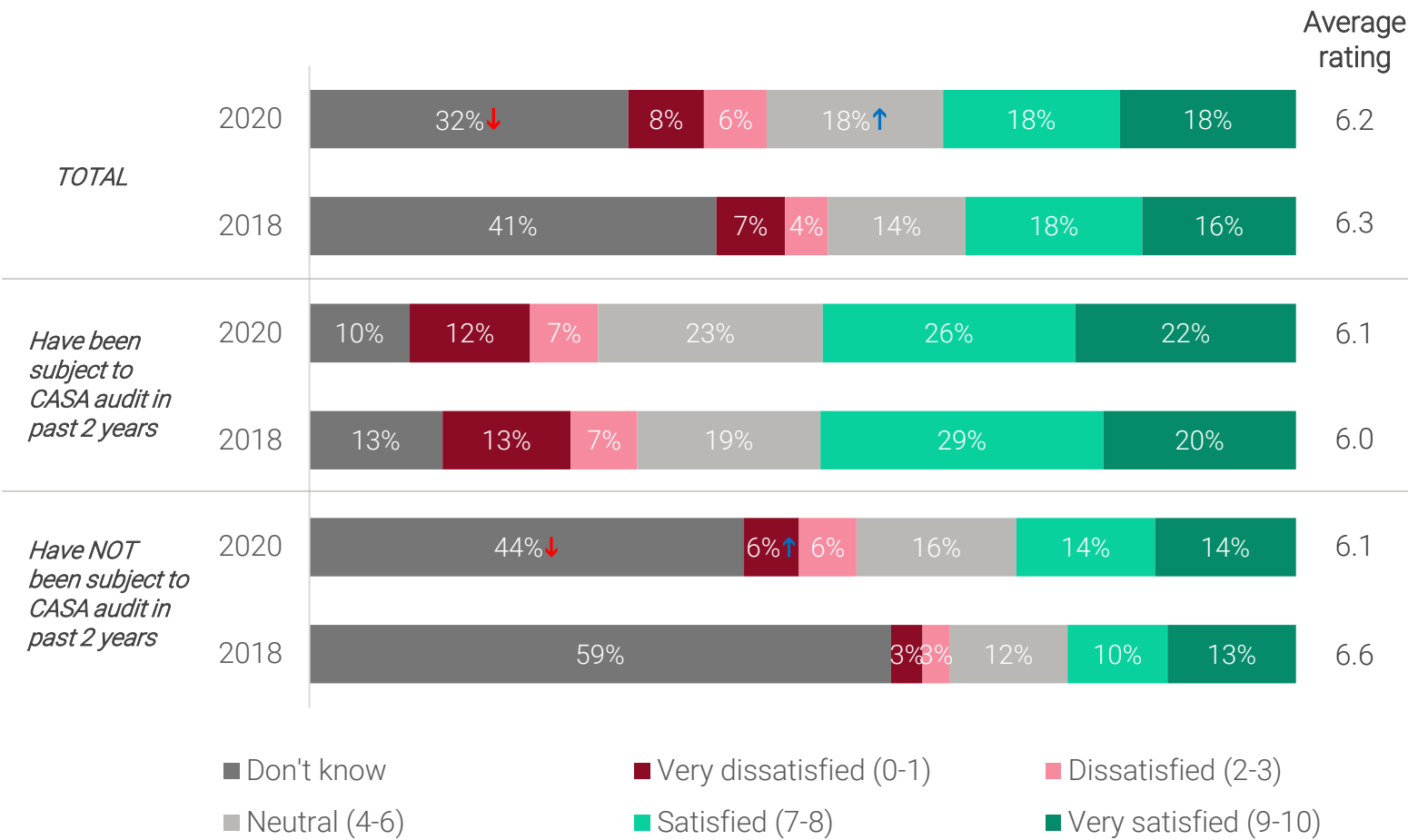




# SATISFACTION WITH CASA'S AUDIT AND COMPLIANCE ACTIVITIES HAS REMAINED SIMILAR TO 2018 LEVELS

- + Stakeholders were asked to rate their satisfaction with how CASA performs its audit and compliance activities.
- + In 2020, just over a third (36%) were satisfied/very satisfied with CASA's performance in this area, compared to 14% who were dissatisfied/very dissatisfied.
- + In each year, a large proportion of 'don't know' has been observed – likely representing those who have limited direct experience in audit and compliance activities.

## SATISFACTION WITH HOW CASA PERFORMS ITS AUDIT AND COMPLIANCE ACTIVITIES

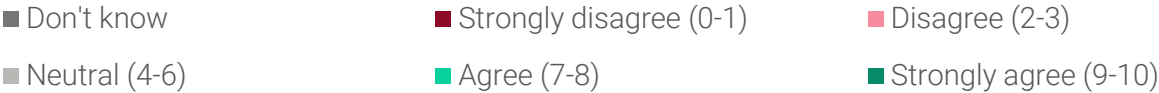
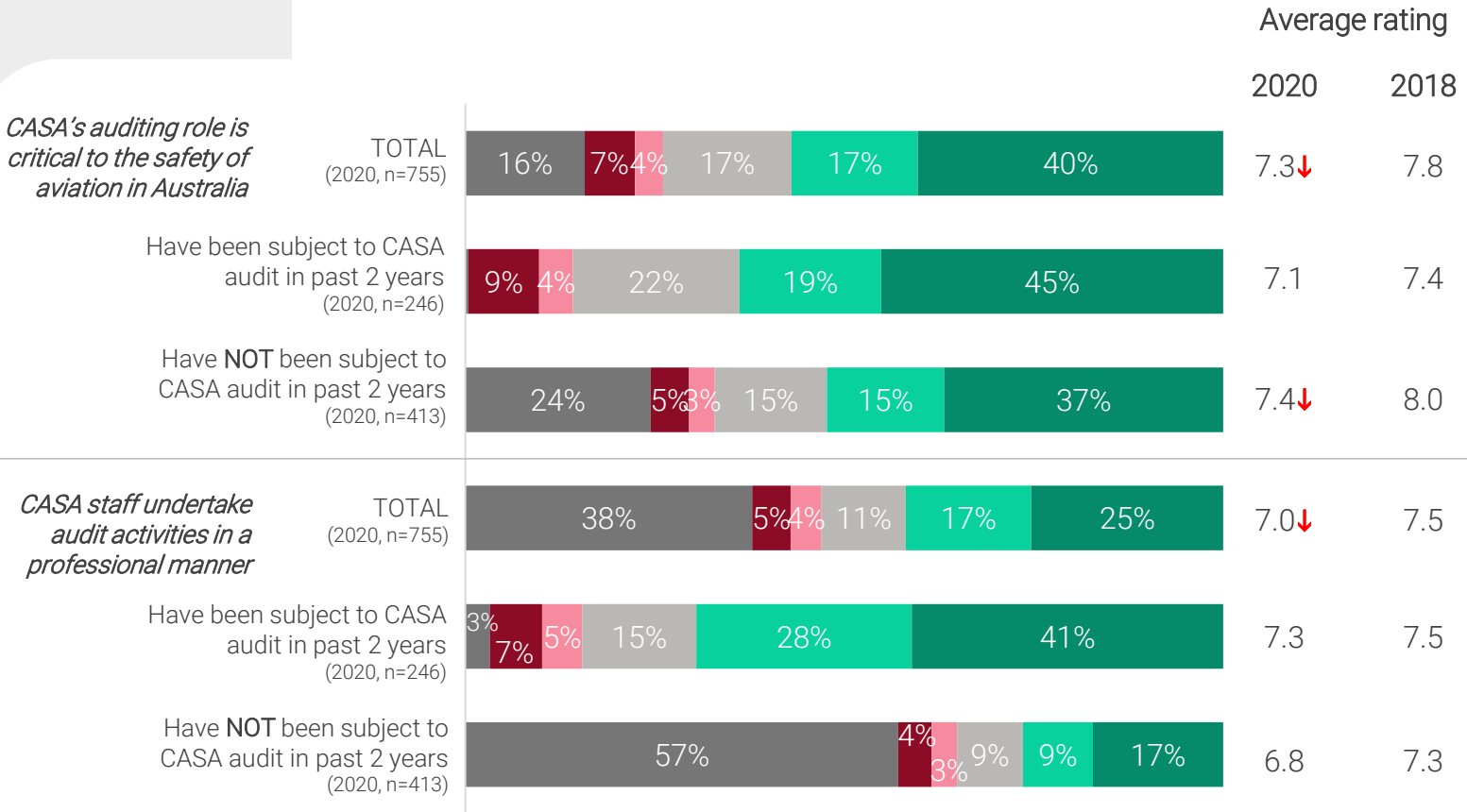


Q11. On a scale of 0 to 10 where 0 is 'very dissatisfied' and 10 is 'very satisfied', how satisfied are you with the way CASA performs its audit and compliance activities (e.g. ramp checks, etc.)?  
 Base: All respondents; 2018 (n=1,168), 2020 (n=755)

# MOST HAVE A POSITIVE PERCEPTION OF CASA'S AUDITING ACTIVITIES

- + Stakeholders were asked to rate their agreement with a series of statements about specific elements of CASA's auditing and compliance practices.
- + Agreement with the statement 'CASA's auditing role is critical to the safety of aviation in Australia' has decreased significantly from 7.8 on average in 2018 to 7.3 in 2020, albeit the proportion of those who disagree or strongly disagree remains quite low overall.
- + A significant decrease was also observed for the statement 'CASA staff undertake audit activities in a professional manner', falling from an average of 7.5 in 2018 to 7.0 in 2020.

## RATING ELEMENTS OF CASA'S PERFORMANCE WITH AUDIT ACTIVITIES

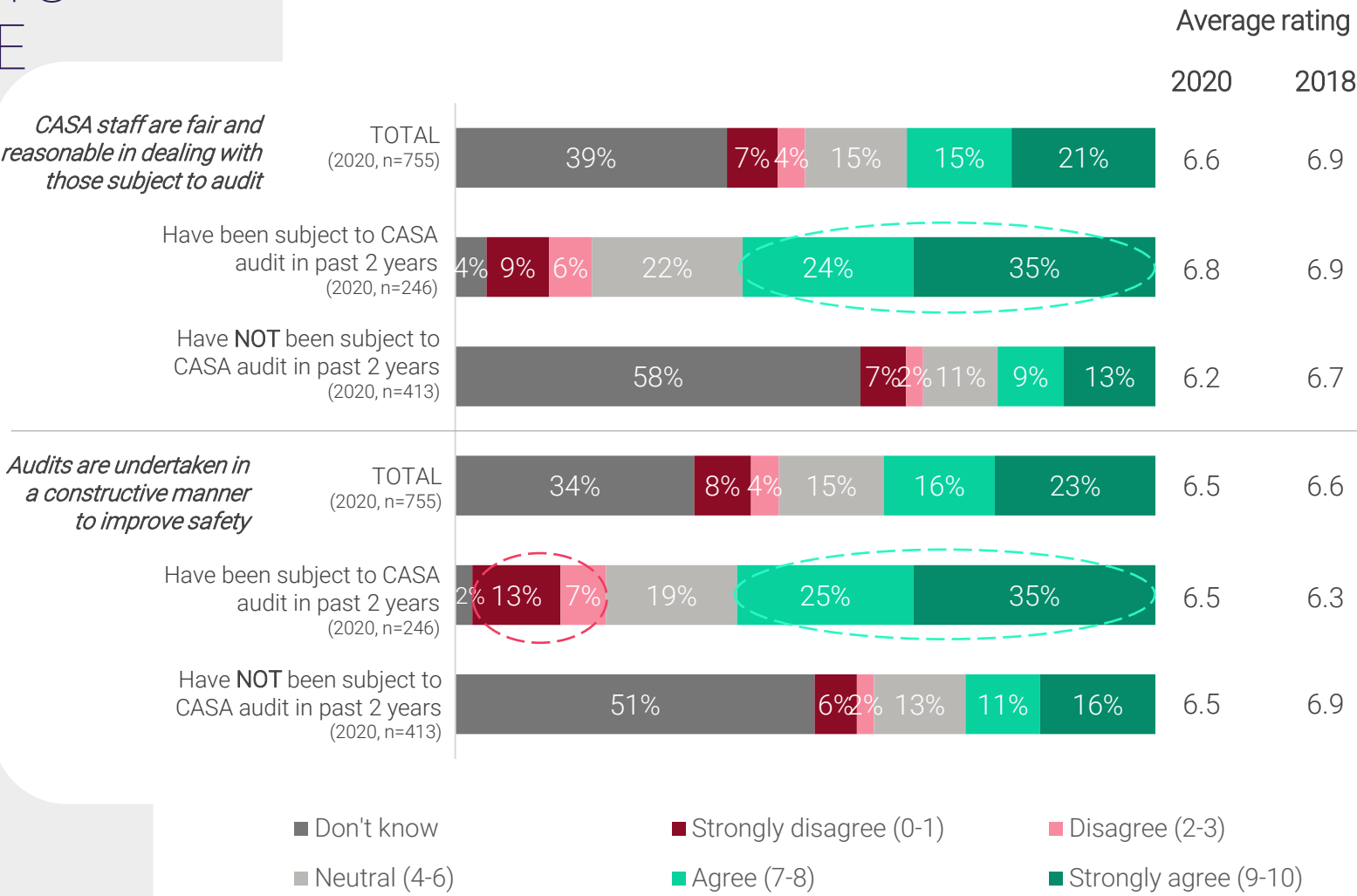


Q13. On a scale of 0 to 10, where 0 is 'strongly disagree' and 10 is 'strongly agree', please indicate your level of agreement with the following statements.  
 Base: All respondents; 2018 (n=1,168), 2020 (n=755)

# MAJORITY OF THOSE WHO HAVE BEEN AUDITED RECENTLY FOUND STAFF TO BE FAIR AND REASONABLE

- + Over half (59%) of those who have been audited by CASA in the past two years agreed that CASA staff were fair and reasonable during this process, compared to just 15% who disagreed.
- + The majority of those who have been audited recently also agreed that audits are undertaken in a constructive manner to improve safety (60%); of note however, around one in five (19%) from this cohort disagreed with this statement.

## RATING ELEMENTS OF CASA'S PERFORMANCE WITH AUDIT ACTIVITIES

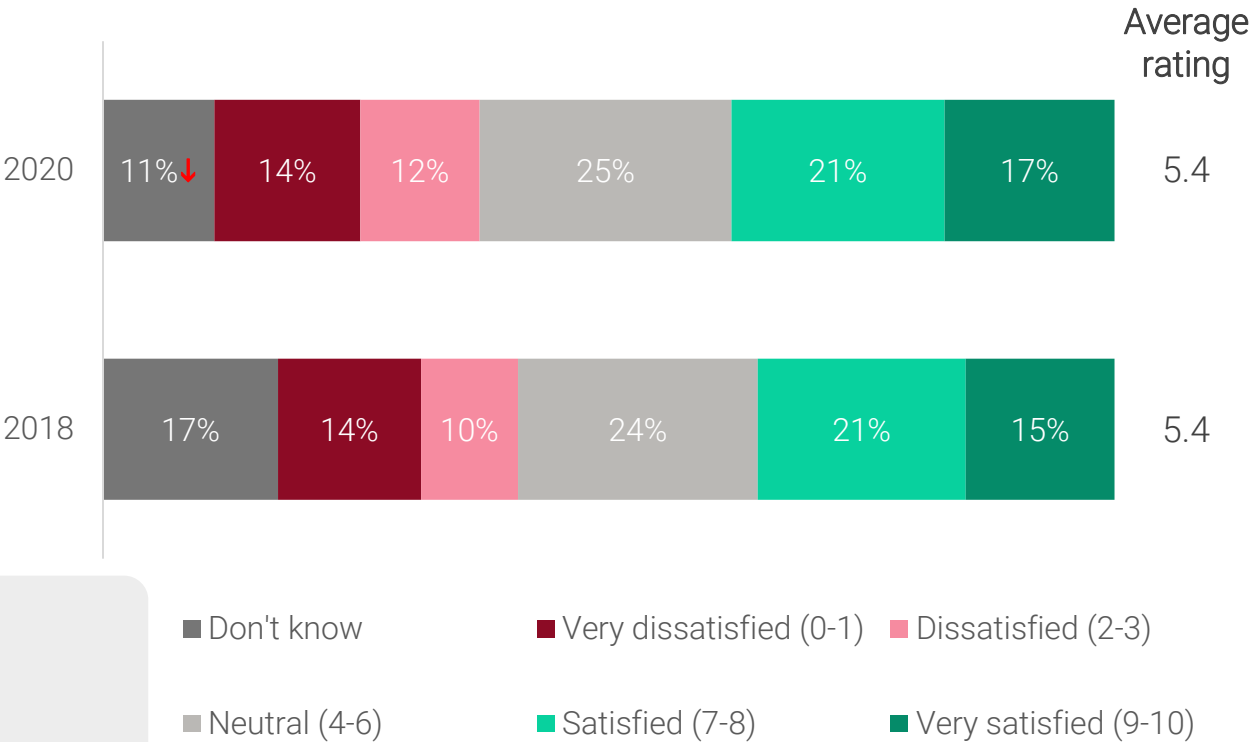


Q13. On a scale of 0 to 10, where 0 is 'strongly disagree' and 10 is 'strongly agree', please indicate your level of agreement with the following statements.  
 Base: All respondents; 2018 (n=1,168), 2020 (n=755)

# VIEWS ON WHETHER CASA IS CONSISTENT IN ITS DECISION-MAKING ARE SPLIT

- + Stakeholders were asked to rate their satisfaction with the consistency of CASA’s decision making.
- + In 2020, 38% were satisfied/very satisfied with the consistency of CASA’s decision making, balanced by a sizeable proportion who feel neutral 25% or dissatisfied/very dissatisfied (26%).
- + The results from 2020 are broadly similar to 2018 with an average rating of 5.4 recorded in both years.
- + There is clearly further scope for CASA to further improve the consistency of decision making moving forward.

SATISFACTION WITH THE CONSISTENCY OF CASA’S DECISION MAKING

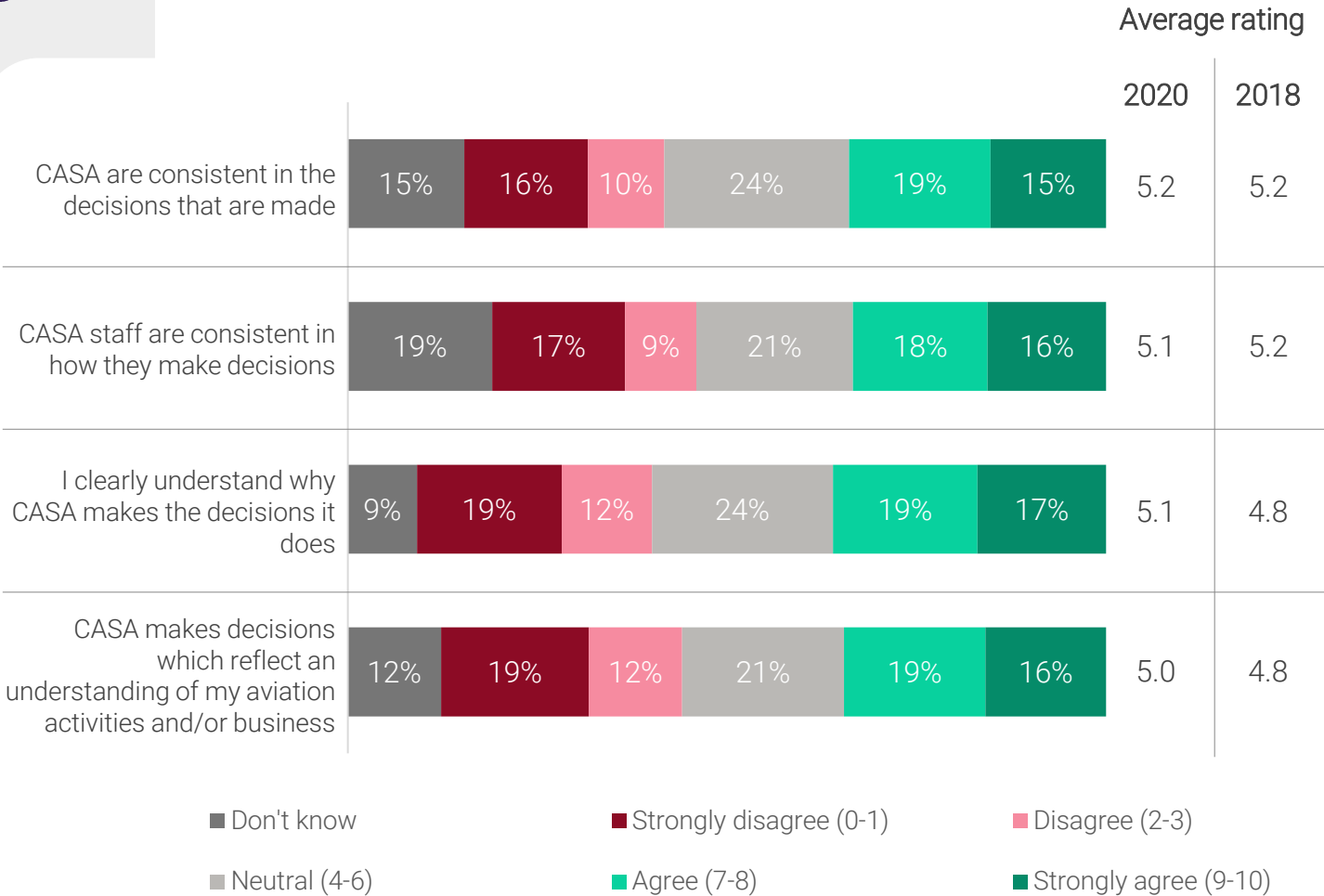


QF1. On a scale of 0 to 10, where 0 is 'very dissatisfied' and 10 is 'very satisfied', how satisfied are you with the consistency of CASA's decision making?  
 Base: All respondents; 2018 (n=1,168), 2020 (n=755)

# JUST 1 IN 3 AGREE THAT CASA STAFF ARE CONSISTENT IN HOW THEY MAKE DECISIONS

- + Stakeholders were then shown a list of agreement statements relating to CASA’s performance to make consistent decision-making.
- + Across each of the statements tested, there was a mix of views about whether CASA demonstrated consistent decision-making – reflected by average ratings ranging from 5.0 to 5.2.
- + Of note, just 36% agree or strongly agree that they clearly understand why CASA makes the decisions it does.

## AGREEMENT WITH CASA’S PERFORMANCE TO MAKE CONSISTENT DECISION-MAKING



QF2. On a scale of 0 to 10, where 0 is 'strongly disagree' and 10 is 'strongly agree', please indicate your level of agreement with the following statements.  
 Base: All respondents; 2018 (n=1,168), 2020 (n=755)

# 04





**DEPTH INTERVIEWS:**  
WITH THOSE WHO HAVE A POOR  
RELATIONSHIP WITH CASA





# DEPTH INTERVIEW FINDINGS: THOSE WHO HAVE A POOR RELATIONSHIP WITH CASA

Seven 45-minute depth interviews were conducted with survey participants who rated their relationship with CASA as very poor or poor (i.e. a 3 or lower on a 0-10 scale); the findings from these depth interviews will therefore carry a negative skew. Participants were selected randomly and had indicated in the survey their willingness to participate in further research for this study. A mix of stakeholders were achieved based on their role and time in the industry.

	<p><b>COVID-19 challenges</b></p> <ul style="list-style-type: none"> <li>COVID-19 has created significant disruptions to all stakeholders in some form. While some have struggled to operate effectively since April, some hope has been provided by border restrictions being lifted, government subsidy support, and in one particular case, a charter operator was able to pick up some of Virgin’s charters. Those involved in flight training reported that few are training at a commercial level but there continues to be adequate demand for private flying training; presumably due to people having less work from COVID-19 and more time on their hands. There were examples of individuals who have had to leave the aviation industry and find stable employment elsewhere – leading to some fears about a loss of talent which may be hard to replace.</li> </ul> <p>“There is potentially a risk now that many of those people who have left aviation to find other employment activities could well end up not coming back because they’ve found employment activity elsewhere. And he is one case, he found a niche position in an organisation that does things for the building industry and he really enjoys it. So in some respects there’s some pressure to stay there rather than go back to flying – that could be a negative long-term for the industry.”</p>
	<p><b>Operating safely in spite of CASA, rather than because of CASA’s regulations</b></p> <ul style="list-style-type: none"> <li>Stakeholders have found that trying to follow CASA’s directions often ends up with ‘unpredictable responses’ and burdensome administration work that requires more time, energy and costs. It was felt that the seemingly never-ending changes and additions to regulations imposed by CASA are actually detrimental to safety as this motivates individuals to avoid dealing with CASA altogether where possible. For their own part, interviewed stakeholders were self-motivated to maintain high standards of safety (based on their own basic principles to protect themselves and others); they also emphasised that having overcomplicated regulations which are hard to follow generally have limited to no safety benefit.</li> </ul> <p>“I know for a fact that most people in aviation are so scared of CASA because they can be your accuser, your judge and your jury all behind closed doors with no comeback if they are wrong. People do not talk to CASA about safety issues, you should be able to discuss things with a legislator. People don’t tell CASA anything – they don’t want CASA involved because it will become burdensome. CASA is quite happy to take away your licence and medical, and at their leisure sort it out. The repressive culture is detrimental to the safety.”</p> <p>“We are being safe in spite of CASA, not because of CASA. We’re all trying to do our best. Everyone has the best intentions. No one goes out flying today saying I’m going to kill someone, I’m going to crash a helicopter. You don’t go out thinking like that. You go out thinking I’m going to come home tonight and going to do the job to the best of my ability. You can’t be thinking, ‘Can I fly that? Is that legal, I’m not too sure? What about my licence, I’m not too sure if that is current?’”</p>



# DEPTH INTERVIEW FINDINGS:

## THOSE WHO HAVE A POOR RELATIONSHIP WITH CASA

	<p><b>Inconsistent answers or advice from CASA</b></p> <ul style="list-style-type: none"> <li>Stakeholders shared common experiences of different CASA offices or staff (including flight instructors and examiners) providing varying responses to the same question. These instances subsequently require stakeholders to invest more time and resources into working out which of these responses is correct and law-abiding. It leads to obvious frustration given that regulations should be ‘black and white’ and not subject to different interpretations. It was suggested that further investment into training ‘on-the-ground’ CASA staff is needed to ensure they have a consistent level of understanding about regulations and decisions made at a head-office level (but not adequately communicated to staff operating at the ground-level).</li> </ul> <p>“I can give you evidence of four different emails about the same subject and it will have four different answers regarding the same regulation. So it’s very difficult to get a straight answer that you know is correct. Have to spend extra time making sure that you are actually getting the right answer and you’re not breaking the law because someone said its right and somebody else says it’s wrong... If we do the wrong thing unintentionally – even if we do it based on what some someone in CASA has said– it’s up to us to make sure we’re complying. It’s frustrating when the people who are supposed to know, don’t know.”</p>
	<p><b>Timeliness and transparency</b></p> <ul style="list-style-type: none"> <li>Stakeholders were frustrated by the perceived double standards which sees CASA enforcing deadlines to provide documentation by a certain date, but then having no deadline or pressure on themselves to action or approve documentation in a similarly timely manner. Stakeholders provided examples of compiling ‘pages and pages’ of documentation to CASA and after a period of waiting, followed-up with CASA only to be told that additional documents (unbeknown to them) were also required to progress the documentation which had originally been submitted. In another case, one stakeholder had their issue resolved by CASA but only found out through their own means.</li> <li>This lack of transparency has implications for small businesses and pilots who are reliant on CASA’s approval before being legally allowed to continue their operations or flying – resulting in lost revenue and valuable time. Stakeholders would welcome a more proactive level of service via a simple email or phone call that can be completed in a matter of minutes to advise of progress and any additional documentation which may be required.</li> </ul> <p>“Trying to get our international AOC amendment done and there’s no communication. Like there’s no care or concern that they haven’t contacted us and just said, “Oh we just need this [document].” It’s a simple thing that takes less than a minute to email. Yet we’re waiting weeks and weeks and weeks. If I did that in my business and treated my customers like that, I wouldn’t have a business. This is what I find quite amazing, they can get away with doing that and have no concern or no worries that they’re affecting what you’re doing on a day-to-day basis.”</p>



# DEPTH INTERVIEW FINDINGS: THOSE WHO HAVE A POOR RELATIONSHIP WITH CASA

	<p><b>Regulations are hard to follow, understand and accept</b></p> <ul style="list-style-type: none"> <li>There were common complaints about new regulations being unnecessary and hard to keep track of. In one case, CASA required a stakeholder to provide an updated flight operations manual to be in line with current regulations. This would replace the previous manual (which had been approved by CASA in 2009) which did not present any obvious danger, but simply meant creating more administration work for this stakeholder.</li> </ul> <p>"I can tell you every single day I'm breaking a rule, I just don't know what rule I'm breaking."</p> <ul style="list-style-type: none"> <li>Small business operators bemoaned CASA's 'one size fits all' approach which seemingly holds aviation businesses at a 'grass-roots' level to the same standards as airlines (despite their gap in available resources). An example of this includes being forced to employ staff (multiple in some cases) on a full-time basis to meet CASA's criteria, when previously these roles had been adequately covered by more affordable options (i.e. by just one person or someone who works part-time).</li> <li>There were also complaints that the level of medical standard required was too high (particularly for private recreational flying) and not supported by a proper risk assessment process. This led to fears (and real examples) of having a pilot licence revoked on the grounds of their medical history – regardless of whether they have been leading a healthy lifestyle in recent years or if an independent medical professional had deemed them to be at no risk.</li> </ul> <p>"Overregulated and ridiculous that we have to provide four years of when we last took prescription medication. If something came up in those four years we could fail that medical and lose our job over that. Just not appropriate."</p>
	<p><b>Staff culture</b></p> <ul style="list-style-type: none"> <li>There was a strong and damning perception of CASA staff being in a 'Canberra-bubble' who were described as being 'stuck in their ways' and who prioritise 'face-saving' instead of admitting to when they are wrong. Ideally, staff should be open to new ideas, have a willingness to embrace new technology, have real-world experience or skills (e.g. engineering, mechanical), and share a passion for flying.</li> </ul> <p>"They don't understand their own rules, they are incapable of admitting they are wrong, they will not listen to external experts on the subject and they act in a manner which is nothing to do with safety and everything to do with face saving and protecting their incorrect initially established position – they are shocking."</p> <ul style="list-style-type: none"> <li>There was also interest in having CASA staff make more frequent airport and aerodrome visits to better understand what is happening 'on the ground' and to rekindle relationships which many currently see as being 'us versus them'.</li> </ul> <p>"I know we've always have had that thing of being terrified if a CASA inspector walks in but just to pop their head in and say "G'day and how's everything going, is there anything you need a hand with?" The days of that type of thing are probably gone, that's probably what it used to be like a long time ago."</p>

# 05



**DEPTH INTERVIEWS:**  
STAKEHOLDERS REPRESENTING KEY  
FORUMS OR NETWORKS



# RESPONSE TO COVID-19 CHALLENGES

## STAKEHOLDERS REPRESENTING KEY FORUMS OR NETWORKS

- Overall, stakeholders felt CASA had done quite well in terms of its COVID-19 response and supporting the aviation sector through a very difficult time.

“I’m actually very proud of how the organisation responded very promptly at a time of pretty desperate need for the sector.”

- Specifically, the extension to renewal deadlines for licences, certificates, etc. were identified as a practical and helpful response that was introduced quickly. However, there is some concern that these might be rolled back in line with rolling back of broader Federal Govt. income support.
- There were calls for these concessions to be sustained over a longer period as many in the sector are still struggling and ‘hanging on by their fingertips’.
- There is now a strong desire to ensure COVID doesn’t serve as a cover for further delays to the broader regulatory reform agenda. There is significant ‘reform fatigue’ and a strong desire to work with CASA in terms of finalising and implementing key remaining reforms.
- CASA need to be very mindful that change=cost for the sector, and therefore any finalisation of new regulations need to be accompanied by a reasonable window of compliance (e.g. min 2-3 years) in order for industry to be able to afford this.

“It’s taken 20 years to get these reforms done – I think CASA need to ensure there is a reasonable window before any new compliance obligations take full effect.”



## CASA'S RELATIONSHIP WITH INDUSTRY

### STAKEHOLDERS REPRESENTING KEY FORUMS OR NETWORKS

- Most felt CASA's engagement with industry had improved in recent years and that the current agenda should be continued under the next DAS.

"I'm fearful if someone comes in with a huge change agenda and wanting to put their stamp on things. Yes repaint the living room but don't tear down the house. CASA is not broken and systemic change for its own sake is not needed."

- A suggestion that TAFF is being underutilised by CASA – one stakeholder requested a twice-yearly meeting between small association execs and DAS (with reps from the various CASA divisions, including stakeholder engagement) to share views, raise key issues/challenges, etc.

"We really need that direct line of communication to ensure our issues are heard and responded to – its also a chance for CASA exec to share their view of the world in terms of emerging issues or risks."

- One stakeholder expressed concern over the recent changes to regional offices in terms of delaying timely resolution of operating issues – the previous model of assigned operations teams within CASA did drive a sound working relationship and typically saw operation issues resolved in a timely and efficient manner. The centralisation of this function is viewed as potentially leading to delays in responses that industry can't afford.





# KEY ISSUES / CHALLENGES

## STAKEHOLDERS REPRESENTING KEY FORUMS OR NETWORKS

- Part 61 still causing issues and challenges.
- Engineer licensing – P. 66 – one stakeholder noted it can be very hard to get qualifications if you're not based in either Brisbane or Melbourne. This puts further pressure on ensuring there are sufficient licenced engineers coming through the system.

"They've done a few stop-gap measures but even those are coming to an end – its an issue they need to really address and fix."

- The recent reforms to Flight and Duty Time regulations was identified as an example where CASA had worked through the issues collaboratively with industry to get something right.

"They commissioned an independent review and we've now got regs that are genuinely reflective of the Australian aviation context – not those designed for a very different overseas system."

- Changes to charter regulations was identified as a key issue moving forward – some had contributed to technical working groups in terms of the maintenance regulations but were now questioning where this was up to. There is a concern that new flying operation standards may be rolled out without the maintenance regulations being ready or finished, which is likely to be unworkable for smaller operators in regional and remote areas.

"You can't have a 145 maintenance requirement where the nearest licenced operator is a thousand kilometres away – it just won't work".



# PRIORITIES FOR NEXT 12 MONTHS

## STAKEHOLDERS REPRESENTING KEY FORUMS OR NETWORKS

- Stakeholders want to see CASA developing a regulatory stance that seeks to grow GA operations – in a safe and compliant manner – rather than seeking to constrain and control all aspects of operations “*to the nth degree*”.
- Continue the good work on classification of operations to ensure regulation load and compliance obligations are genuinely reflective of the risk profile of those specific operations.
- Consultation can’t be seen by CASA staff as a ‘tick a box’ exercise or stakeholders will disengage.
- Stakeholders want to feel listened to and brought into the conversation at an earlier stage before key regulatory design decisions are made. Where they sacrifice their time and money to participate in a CASA led consultation or engagement process, they want to see how their views have been actively considered in final decision making.

“We get invited to consultation but more often than not it’s not a blank sheet but rather an advanced or close to finalised change and they say, ‘Here it is. What do you think?’. That’s not genuine consultation.”

- One stakeholder noted changes to Part 141 that now sees a person wanting to apply for a head of check and training position needing to previously have been a flight instructor as severely limiting the pool of talent that could apply for such roles and do them very well.

“Just because as a young bloke you spent time instructing people how to fly small single engine CESNAs doesn’t mean you are the best person to train people on operating a Boeing 737 – surely you want people with a depth of expertise irrespective of whether they have previously been a flight instructor.”

# 06

## APPENDIX: DEMOGRAPHIC ANALYSIS

 ONLINE SURVEY FINDINGS

# SATISFACTION WITH RELATIONSHIP

## DEMOGRAPHIC ANALYSIS

Average	Age group							Time operating/involved in aviation sector						Current primary role in aviation sector			Aircraft owner/operator		CASA region/office most contact with over past 6 months	
	TOTAL	<29	30-39	40-49	50-59	60-69	70+	3 years or less	4-10 years	11-20 years	21-30 years	31-40 years	40+ years	Remotely piloted aircraft systems	Air transport pilot	Flight training	Aircraft owner or operator	Not an aircraft owner or operator	Syd. region (Sydney & Tamworth)	Client Service Centre
Column n	755	58	79	144	178	175	84	113	116	106	146	124	150	75	60	39	404	351	104	73
QA1 – Overall satisfaction with relationship with CASA	6.3	6.3	6.3	6.2	6.7	6.6	5.8	7.4 ↑	6.4	6.3	5.9	6.1	6.0	7.4 ↑	5.0 ↓	5.4	6.0 ↓	6.6 ↑	6.8	7.1 ↑
QA4 – Rating CASA's response to COVID-19	7.2	7.2	6.6	6.9	7.7 ↑	7.4	7.3	8.0 ↑	7.2	7.1	6.8	6.8	7.2	8.3 ↑	6.3	7.1	6.8 ↓	7.6 ↑	7.5	8.1 ↑
QA3 – Satisfaction with elements of CASA's performance:																				
Respects your confidentiality	7.2	7.3	7.0	7.1	7.7	7.6	6.9	7.9 ↑	7.4	7.4	6.9	7.0	7.1	7.9	6.2	6.3	6.9 ↓	7.7 ↑	7.5	7.9
Operates with safety as its primary focus	6.6	6.9	6.0	6.4	7.0	7.0	6.3	8.2 ↑	6.8	6.6	6.2	6.2	5.9 ↓	8.4 ↑	5.1 ↓	5.7	6.3	6.9	6.8	7.7 ↑
Shares information & knowledge willingly	6.2	6.9	5.9	5.9	6.6	6.5	5.5	7.9 ↑	6.5	6.0	5.8	5.6	5.6	8.0 ↑	4.8 ↓	5.1	5.9 ↓	6.5 ↑	6.6	7.2 ↑
Provides competent & capable staff	5.9	6.7	5.8	5.6	6.5 ↑	6.1	5.2	7.8 ↑	6.4	6.1	5.2 ↓	5.7	5.2 ↓	7.6 ↑	4.4 ↓	4.9	5.5 ↓	6.5 ↑	6.4	6.8
Maintains an open and transparent relationship with you	5.9	6.1	5.3	5.7	6.4	6.3	5.3	7.3 ↑	6.1	5.8	5.5	5.7	5.4	7.7 ↑	4.7 ↓	5.1	5.5 ↓	6.3 ↑	6.3	6.8 ↑
Strives for operational excellence	5.8	6.3	5.5	5.4	6.3	6.2	5.1	8.0 ↑	6.1	5.4	5.1 ↓	5.4	5.1 ↓	8.0 ↑	4.0 ↓	4.9	5.4 ↓	6.2 ↑	6.1	7.0 ↑
Provides timely responses to queries or requests for information	5.7	6.2	5.7	5.5	6.2	5.9	5.5	7.5 ↑	6.1	5.6	5.3	5.4	5.2	7.4 ↑	4.3 ↓	4.9	5.4 ↓	6.2 ↑	5.9	6.9 ↑
Is efficient in its dealings with you	5.7	5.9	5.6	5.4	6.2	6.0	5.7	7.4 ↑	6.1	5.3	5.2	5.5	5.3	7.5 ↑	4.4 ↓	4.9	5.4 ↓	6.2 ↑	6.0	6.3
Actively helps stakeholders comply with regulations	5.7	6.1	5.6	5.7	6.0	5.9	5.4	7.3 ↑	6.0	5.7	5.3	5.3	5.2	7.5 ↑	4.4 ↓	4.5	5.4 ↓	6.2 ↑	6.2	6.4
Makes it clear who you need to contact within CASA	5.6	5.9	5.7	5.5	5.9	5.8	5.3	6.9 ↑	5.9	6.0	5.4	5.1	5.0	7.0 ↑	4.7	4.6	5.1 ↓	6.2 ↑	5.8	6.5
Is responsive to your needs	5.5	6.2	5.5	5.2	6.1 ↑	5.4	5.2	7.2 ↑	6.0	5.3	5.0	5.2	4.9	7.3 ↑	3.9 ↓	4.6	5.0 ↓	6.0 ↑	5.7	6.5 ↑
Builds a relationship of trust with you	5.5	6.0	5.3	5.2	6.0	5.8	4.7	7.3 ↑	5.6	5.2	4.9	5.2	5.0	7.2 ↑	3.6 ↓	4.4	5.0 ↓	6.0 ↑	6.1	6.3
Treats all stakeholders fairly and with respect	5.4	6.0	5.3	5.4	5.6	5.7	4.9	7.5 ↑	5.6	5.3	5.1	4.8	4.8	7.4 ↑	4.1 ↓	4.4	5.0 ↓	5.9 ↑	6.2	5.9
Behaves with strength and courage	5.4	6.0	5.0	5.3	6.0 ↑	5.5	4.8	7.4 ↑	5.6	5.3	4.6 ↓	5.3	4.7 ↓	7.3 ↑	3.3 ↓	4.9	4.9 ↓	5.9 ↑	5.8	6.1
Takes actions that are appropriate and in proportion to circumstances	5.4	6.0	5.2	5.1	6.0 ↑	5.6	4.7	7.4 ↑	5.5	5.0	4.9	5.1	4.7 ↓	7.2 ↑	4.0 ↓	4.3	4.9 ↓	6.0 ↑	6.1 ↑	6.3
Understands you/your business/organisation	5.3	6.1	5.1	5.0	5.8	5.5	4.7	6.9 ↑	5.6	5.1	4.7	5.2	4.8	6.8 ↑	4.3	4.5	4.6 ↓	6.1 ↑	5.7	6.2
Works collaboratively with industry	5.3	5.8	5.1	5.3	5.8	5.3	4.7	7.3 ↑	5.4	5.3	4.7	4.9	4.7	7.3 ↑	4.1 ↓	4.3	4.8 ↓	5.8 ↑	5.9	5.9
Balances consistency and flexibility	5.1	5.8	5.1	5.0	5.5	5.4	4.7	6.9 ↑	5.5	5.0	4.6	4.8	4.6	6.9 ↑	3.8 ↓	4.3	4.6 ↓	5.7 ↑	5.7	5.7
Is openly accountable for its actions	4.8	5.5	4.6	4.8	5.1	5.0	4.5	7.2 ↑	5.1	4.6	4.0 ↓	4.4	4.3	7.5 ↑	3.1 ↓	4.0	4.4 ↓	5.3 ↑	5.7 ↑	5.4
Is innovative and open to new ideas	4.7	5.2	4.4	4.6	5.0	4.7	4.5	6.7 ↑	5.1	4.6	3.8 ↓	4.5	4.0 ↓	7.1 ↑	3.6	4.0	4.2 ↓	5.2 ↑	5.1	5.2
Strives to minimise administrative costs & charges	4.5	4.3	4.1	4.4	4.8	4.9	4.4	6.4 ↑	4.4	4.0	3.9	4.4	4.1	6.3 ↑	3.2 ↓	2.8 ↓	4.2 ↓	4.9 ↑	5.0	5.4

# COMPLIANCE WITH AVIATION SAFETY REGULATIONS

## DEMOGRAPHIC ANALYSIS

	Age group							Time operating/involved in aviation sector							Current primary role in aviation sector			Aircraft owner/operator		CASA region/office most contact with over past 6 months
	TOTAL	<29	30-39	40-49	50-59	60-69	70+	3 years or less	4-10 years	11-20 years	21-30 years	31-40 years	40+ years	Remotely piloted aircraft systems	Air transport pilot	Flight training	Aircraft owner or operator	Not an aircraft owner or operator	Client Service Centre	
Column n	755	58	79	144	178	175	84	113	116	106	146	124	150	75	60	39	404	351	73	
QB1 – Ease of complying with all aviation safety regulations relevant to your role/activities	6.3	7.2 ↑	6.0	6.1	6.5	6.5	6.1	7.4 ↑	6.5	6.2	6.2	5.8	5.8	7.5 ↑	6.0	5.0	5.9 ↓	6.7 ↑	6.9	
QB2 – Confidence in ability to comply with all aviation safety regulations relevant to your role	7.4	8.3 ↑	7.3	7.6	7.6	7.5	7.1	8.5 ↑	7.4	7.5	7.5	7.0	6.9	8.4 ↑	7.3	6.3	7.1 ↓	7.8 ↑	8.0	
QB3 – Agreement statements																				
Regulations play a key role in ensuring I operate safely	7.1	7.5	6.9	6.6	7.5	7.3	6.7	8.6 ↑	6.8	7.1	6.4 ↓	6.9	6.8	8.7 ↑	6.9	5.8	6.5 ↓	7.7 ↑	7.9 ↑	
I have a sound understanding of all regulations governing my aviation activities	7.0	7.5	7.1	6.9	7.2	7.2	6.7	8.1 ↑	6.7	7.2	6.8	6.7	7.0	8.1 ↑	6.9	5.8 ↓	6.7 ↓	7.4 ↑	7.4	
CASA themselves have a sound understanding of the regulations governing my activities	6.2	6.6	6.0	6.0	6.8 ↑	6.2	5.6	8.0 ↑	6.4	6.4	5.7	5.9	5.2 ↓	8.4 ↑	4.3 ↓	5.1	5.7 ↓	6.6 ↑	7.4 ↑	
I can easily interpret how regulations affect the way I operate	5.8	6.5	5.5	5.5	6.1	6.0	5.6	7.5 ↑	5.8	5.6	5.3	5.4	5.4	7.6 ↑	5.1	4.1 ↓	5.4 ↓	6.3 ↑	6.3	
CASA inspectors have a consistent understanding of regulations and apply rules consistently	5.6	6.4	5.4	5.7	6.2	5.5	4.7	7.8 ↑	6.3	5.7	5.0	5.3	4.6 ↓	7.7 ↑	4.8	4.2	5.1 ↓	6.3 ↑	6.6	
Regulations covering my activities are easy to understand	5.5	6.5 ↑	5.0	5.1	5.9	5.8	5.4	7.4 ↑	5.7	5.4	4.9	5.1	5.0	7.4 ↑	4.4 ↓	3.9 ↓	5.1 ↓	6.0 ↑	6.2	
CASA explains the regulations and how they affect industry stakeholders in a clear and succinct manner	5.5	6.0	5.2	5.2	6.0	5.7	5.1	7.4 ↑	5.8	5.2	5.0	5.1	4.9	7.6 ↑	4.6	3.7 ↓	5.1 ↓	6.0 ↑	6.1	

# SERVICE DELIVERY DEMOGRAPHIC ANALYSIS

	Age group							Time in aviation sector							Current primary role in aviation sector					Aircraft owner/operator		CASA region/office most contact with over past 6 months	
	TOTAL	<29	30-39	40-49	50-59	60-69	70+	3 years or less	4-10 years	11-20 years	21-30 years	31-40 years	40+ years	Private flying	Recreational pilot/private pilot	Remotely piloted aircraft systems	Air transport pilot	Commercial pilot	Chief pilot	Aircraft owner or operator	Not an aircraft owner or operator	Eastern Region (Brisbane)	Client Service Centre
Column n	755	58	79	144	178	175	84	113	116	106	146	124	150	122	87	75	60	58	35	404	351	78	73
QD.1 – Satisfaction with CASA's service delivery	6.0	6.4	5.9	5.6	6.5 ↑	6.2	5.7	7.6 ↑	6.2	5.8	5.5	5.8	5.5	6.0	5.9	7.6 ↑	4.6 ↓	5.9	6.0	5.7 ↓	6.4 ↑	5.8	7.0 ↑
QD.4 – Satisfaction with most recent interaction with CASA staff																							
CASA staff were helpful	7.1	7.5	7.1	6.7	7.8 ↑	7.3	6.6	8.3 ↑	7.1	7.1	6.7	6.9	6.7	7.3	6.8	8.6 ↑	6.2	6.7	7.8	6.7 ↓	7.5 ↑	7.1	8.2 ↑
CASA staff understood your issue	7.0	7.0	6.8	6.7	7.3	7.2	6.7	8.0 ↑	7.0	6.8	6.7	6.7	6.8	7.2	6.4	8.5 ↑	6.1	6.3	7.7	6.6 ↓	7.3 ↑	7.0	8.0 ↑
You were given information or advice that answered your query or resolved your issue	6.8	7.2	7.0	6.4	7.5 ↑	6.9	6.5	8.1 ↑	6.9	6.6	6.4	6.6	6.6	7.0	6.6	8.4 ↑	6.1	6.5	6.8	6.5 ↓	7.2 ↑	6.7	8.0 ↑
You were given information or advice that was consistent with information or advice you had previously been given	6.8	6.9	6.7	6.3	7.2	7.3	6.4	8.0 ↑	6.8	6.6	6.3	6.5	6.6	7.0	6.7	8.3 ↑	5.7	6.1	6.4	6.4 ↓	7.2 ↑	6.4	7.8 ↑
CASA staff knew the history of your issue	6.7	6.7	6.5	6.5	7.1	6.8	6.4	7.8 ↑	6.5	6.9	6.5	6.3	6.3	6.9	6.5	7.9 ↑	6.0	6.2	7.1	6.3 ↓	7.1 ↑	6.9	7.3
Your issue or query was processed in a timely manner	6.6	7.1	6.5	6.3	7.0	6.7	6.6	8.0 ↑	6.7	6.6	6.1	6.3	6.3	6.4	6.7	8.1 ↑	5.7	6.3	6.2	6.3 ↓	7.0 ↑	6.7	7.7 ↑
Your transaction was completed with only reasonable time or costs incurred by you	6.3	6.3	6.5	6.0	6.7	6.6	6.3	7.7 ↑	6.6	6.0	5.7	5.9	6.3	6.3	6.1	8.0 ↑	4.9 ↓	6.0	6.2	6.0	6.7	6.3	7.2
QD.2 – Number of times you have had direct contact with CASA in past 12 months																							
Average number of times with 'zeros (no contact)'	4.5	2.0 ↓	4.2	4.9	5.2	4.9	3.3	2.0 ↓	2.9 ↓	4.2	5.0	6.9	5.5	1.5 ↓	1.9 ↓	2.4 ↓	2.9 ↓	2.6 ↓	10.6 ↑	4.9	4.0	7.7 ↑	2.5 ↓
Average number of times without 'zeros (no contact)'	6.6	3.2 ↓	5.7	7.4	7.1	7.2	5.7	3.8 ↓	4.0 ↓	6.0	7.0	9.2	7.9	2.4 ↓	3.6 ↓	4.7	3.8 ↓	3.3 ↓	11.3	7.1	6.0	10.1	4.1 ↓

[illegible]

# DEVELOPMENT OF AVIATION SAFETY REGULATIONS

## DEMOGRAPHIC ANALYSIS

	Age group							Time operating/involved in aviation sector						Current primary role in aviation sector			Aircraft owner/operator		CASA region/office most contact with over past 6 months
	TOTAL	<29	30-39	40-49	50-59	60-69	70+	3 years or less	4-10 years	11-20 years	21-30 years	31-40 years	40+ years	Remotely piloted aircraft systems	Air transport pilot	Licensed aircraft maintenan ce engineer	Aircraft owner or operator	Not an aircraft owner or operator	Eastern Region (Brisbane office)
Column n	755	58	79	144	178	175	84	113	116	106	146	124	150	75	60	30	404	351	78
QE1 – Satisfaction with the ways CASA develops aviation safety regulations	5.5	6.2	5.3	5.1	5.8	5.7	5.2	7.9 ↑	5.8	5.1	5.0	5.0	4.7 ↓	7.8 ↑	4.2 ↓	5.2	5.0 ↓	6.0 ↑	5.3
QE2 – Agreement statements																			
My input to regulation and reform would be useful to CASA	6.7	7.1	6.7	6.7	7.0	6.5	6.6	7.0	6.7	6.7	6.2	6.8	7.0	6.9	6.6	8.1 ↑	6.6	6.8	7.4
CASA clearly communicates the strategic intent of reforms to aviation safety regulations	5.6	6.2	5.4	5.3	6.1	5.8	5.4	7.6 ↑	6.2	5.4	5.1	5.2	4.9 ↓	7.9 ↑	4.6 ↓	5.4	5.3 ↓	6.0 ↑	5.6
CASA provides me with adequate opportunities to provide input on regulation development and reform	5.6	5.8	5.3	5.2	6.1	6.0	5.4	7.3 ↑	5.9	5.0	5.1	5.6	5.3	7.5 ↑	4.4	5.5	5.5	5.9	5.7
CASA always demonstrates the case underpinning aviation safety regulation reform	5.4	5.9	5.0	5.0	6.0	5.7	5.0	7.5 ↑	5.7	4.9	5.0	5.0	4.8	7.8 ↑	4.5	5.5	5.0 ↓	5.9 ↑	5.4
CASA does a good job of translating my legal obligations into practical guidance	5.3	5.9	5.0	5.0	5.8	5.6	5.0	7.3 ↑	5.7	4.9	4.8	4.9	4.7	7.6 ↑	4.2 ↓	5.1	5.0 ↓	5.7 ↑	5.4
Current aviation safety regulations represent the most current learning and innovation in the industry	5.3	5.8	4.8	5.0	5.8	5.5	5.0	7.5 ↑	5.7	4.7	4.8	4.8	4.5 ↓	7.7 ↑	3.9 ↓	5.3	4.9 ↓	5.7 ↑	5.2
CASA always consults with the most appropriate people in industry when developing and reforming aviation safety regulations	4.8	5.6	4.4	4.5	5.5	4.8	4.3	7.0 ↑	5.4	4.3	4.3	4.3	4.1	7.2 ↑	3.5 ↓	4.4	4.3 ↓	5.3 ↑	4.8
QE5 –Importance of these factors in terms of encouraging you to consult with CASA (face-to-face or written)																			
The topic of the consultation is relevant or interesting to me	7.3	7.0	7.5	7.0	7.4	7.6	7.4	7.3	6.9	7.2	7.1	7.8	7.6	7.5	6.5	8.3	7.3	7.4	7.9
Receiving feedback on how my contribution was used	6.9	7.0	6.7	6.6	7.1	7.2	6.4	7.0	6.4	7.1	6.4	7.6	6.8	6.9	6.2	7.6	6.7	7.0	7.5
Feeling like my contribution would be used to make real change	6.8	6.8	7.3	6.7	6.8	6.9	6.5	7.0	6.4	7.0	6.3	7.3	6.8	7.0	6.2	7.7	6.7	7.0	7.4
A face-to-face session is held in a location near me	6.8	6.8	6.5	6.2	6.8	7.3	6.7	7.1	6.4	6.6	6.4	7.5	6.7	6.6	5.8	7.7	6.7	6.9	7.0
There is an opportunity to network with others in my industry	6.6	7.5	6.5	6.1	6.7	7.0	6.4	7.4	6.4	6.5	6.1	6.8	6.7	6.8	6.0	6.9	6.4	6.9	7.6 ↑
The invitation to participate came to me personally	6.4	6.5	6.2	6.2	6.6	6.6	6.3	6.9	6.1	6.3	5.9	7.0	6.3	6.9	5.7	7.2	6.3	6.5	7.1
There is an opportunity to meet people from CASA whom I would like to meet	6.3	6.4	6.0	6.4	6.3	6.7	6.3	6.6	6.1	6.4	5.9	6.8	6.4	6.4	5.5	7.5	6.2	6.5	7.3 ↑



# CONSISTENT DECISION MAKING & DIALOGUE WITH INDUSTRY

## DEMOGRAPHIC ANALYSIS

Column n	Age group							Time operating/involved in aviation sector							Current primary role in aviation sector		Aircraft owner/operator		CASA region/office most contact with over past 6 months
	TOTAL	<29	30-39	40-49	50-59	60-69	70+	3 years or less	4-10 years	11-20 years	21-30 years	31-40 years	40+ years	Remotely piloted aircraft systems	Air transport pilot	Aircraft owner or operator	Not an aircraft owner or operator	Client Service Centre	
	755	58	79	144	178	175	84	113	116	106	146	124	150	75	60	404	351	73	
QF1 – Satisfaction with consistency of CASA’s decision making	5.4	6.0	5.5	5.0	5.9	5.6	5.1	7.3 ↑	5.9	5.0	4.8 ↓	5.1	4.9	7.3 ↑	3.9 ↓	4.9 ↓	6.0 ↑	6.5 ↑	
QF2 – Agreement statements																			
CASA are consistent in the decisions that are made	5.2	5.7	5.1	5.2	5.6	5.2	4.8	7.1 ↑	5.8	4.9	4.7	4.8	4.3 ↓	7.4 ↑	3.6 ↓	4.8 ↓	5.7 ↑	6.0	
CASA staff are consistent in how they make decisions	5.1	5.5	5.1	5.1	5.7	5.4	4.3	7.2 ↑	5.6	5.1	4.7	5.0	4.1 ↓	7.5 ↑	3.4 ↓	4.8 ↓	5.6 ↑	6.0	
I clearly understand why CASA makes the decisions it does	5.1	5.8	4.7	4.8	5.7 ↑	5.2	4.5	6.9 ↑	5.5	4.8	4.4	4.9	4.4 ↓	7.3 ↑	3.6 ↓	4.7 ↓	5.6 ↑	5.7	
CASA makes decisions which reflect an understanding of my aviation activities and/or business	5.0	5.6	4.8	4.8	5.5	5.1	4.5	6.9 ↑	5.5	4.6	4.4	4.7	4.2 ↓	7.1 ↑	3.5 ↓	4.5 ↓	5.6 ↑	5.9	

Column n	Age group							Time operating/involved in aviation sector							Current primary role in aviation sector		Aircraft owner/operator	
	TOTAL	<29	30-39	40-49	50-59	60-69	70+	3 years or less	4-10 years	11-20 years	21-30 years	31-40 years	40+ years	Remotely piloted aircraft systems		Air transport pilot		
														Aircraft owner or operator	Not an aircraft owner or operator			
QH1 – Satisfaction with CASA's ongoing dialogue with industry	755	58	79	144	178	175	84	113	116	106	146	124	150	75	60	404	351	
QH2 – Agreement statements	5.5	6.0	5.3	5.2	5.9	5.8	5.4	7.4 ↑	5.9	5.0	5.1	5.0	5.0	7.7 ↑	4.1 ↓	5.0 ↓	6.1 ↑	
I have a professional and courteous relationship with CASA staff	7.5	6.7	7.1	7.5	8.1 ↑	7.8	6.5 ↓	7.9	7.1	7.8	7.1	7.7	7.4	8.2	6.8	7.3	7.7	
CASA is vital in ensuring aviation safety in Australia	7.3	7.0	7.0	7.2	7.8 ↑	7.6	6.7	8.7 ↑	7.0	7.6	6.5 ↓	7.4	6.9	9.2 ↑	7.0	6.8 ↓	7.9 ↑	
CASA provides me with information which is relevant to my aviation activities	6.2	6.4	5.8	6.0	6.6	6.6	5.8	7.6 ↑	6.4	6.0	5.7	6.2	5.6	7.8 ↑	5.1 ↓	5.9 ↓	6.6 ↑	
CASA is actively involved in relevant committees and events	6.1	6.1	5.7	5.8	6.5	6.4	5.7	7.6 ↑	5.9	6.1	5.9	6.1	5.3	8.0 ↑	5.3	5.7 ↓	6.6 ↑	
If I need assistance or information I know who to contact in CASA to get an answer to my question	5.7	6.1	5.7	5.5	6.0	5.8	5.0	6.8 ↑	5.8	5.8	5.6	5.5	5.0	6.8 ↑	4.5	5.2 ↓	6.2 ↑	
CASA values input from industry	5.1	5.6	4.9	4.9	5.8	5.3	4.5	7.2 ↑	5.1	4.8	4.8	5.1	4.3 ↓	7.5 ↑	4.0	4.6 ↓	5.8 ↑	
CASA takes the time to get to know people in the industry	5.0	5.1	4.9	5.0	5.7	5.1	4.7	6.1 ↑	5.1	5.1	4.9	4.8	4.7	6.5 ↑	3.9	4.5 ↓	5.6 ↑	

# CASA'S AUDIT AND COMPLIANCE ACTIVITY PERFORMANCE

## DEMOGRAPHIC ANALYSIS

	Age group							Time operating/involved in aviation sector							Current primary role in aviation sector							Aircraft owner/operator		CASA region/office most contact with over past 6 months			
	TOTAL	<29	30-39	40-49	50-59	60-69	70+	3 years or less	4-10 years	11-20 years	21-30 years	31-40 years	40+ years	Private flying	Recreational pilot/private pilot	Remotely piloted aircraft systems	Air transport pilot	Commercial pilot	Flight training	Chief pilot	Licensed aircraft maintenance engineer	Aircraft owner or operator	Not an aircraft owner or operator	Head Office (Canberra)	Southern Region (Melb.)	Northern Region (Cairns & Darwin)	Client Service Centre
Column n	755	58	79	144	178	175	84	113	116	106	146	124	150	122	87	75	60	58	39	35	30	404	351	185	72	29	73
Q11 – Satisfaction with the way CASA performs its audit and compliance activities	6.2	6.7	5.5	6.0	7.0 ↑	6.7	5.0 ↓	7.8 ↑	6.2	6.6	5.5	6.3	5.8	6.2	5.8	8.0 ↑	6.1	5.6	5.3	6.5	6.3	5.7 ↓	6.8 ↑	6.0	5.6	6.3	7.3
Q13 – Agreement statements																											
CASA's auditing role is critical to the safety of aviation in Australia	7.3	7.1	7.1	7.1	7.9 ↑	7.6	6.8	8.4 ↑	6.9	7.7	6.7	7.4	7.0	7.0	6.9	8.7 ↑	6.9	6.9	6.6	6.5	8.7 ↑	6.7 ↓	7.9 ↑	7.0	7.0	7.7	8.5 ↑
CASA staff undertake audit activities in a professional manner	7.0	7.4	6.5	7.0	7.6	7.5	5.6 ↓	8.1 ↑	7.0	7.6	6.5	7.2	6.7	6.6	7.0	8.4 ↑	6.6	6.7	6.1	7.9	7.4	6.5 ↓	7.6 ↑	6.4	6.8	8.0	8.1
CASA staff are fair and reasonable in dealing with those subject to audit	6.6	6.7	5.8	6.8	7.2	6.8	5.4	7.7 ↑	6.4	7.2	5.9	6.7	6.2	6.0	5.7	8.3 ↑	6.3	5.9	5.5	7.2	7.4	5.8 ↓	7.3 ↑	6.0	6.5	7.4	7.3
Audits are undertaken in a constructive manner to improve safety	6.5	7.2	5.7	6.5	7.2 ↑	6.7	5.6	8.2 ↑	6.7	6.8	5.7 ↓	6.6	6.0	6.1	6.3	8.4 ↑	5.9	6.6	5.3	6.6	6.9	5.8 ↓	7.2 ↑	6.0	6.5	7.3	7.2
Q12 – Have you or your organisation been subject to any CASA audit activity over the past two years?																											
Yes	33%	26%	41%	37%	34%	33%	21% ↓	8% ↓	23% ↓	36%	42% ↑	48% ↑	35%	9% ↓	6% ↓	1% ↓	53% ↑	26%	56% ↑	71% ↑	57% ↑	26% ↓	40% ↑	28%	50% ↑	69% ↑	16% ↓
No	55%	36% ↓	41% ↓	53%	57%	60%	67% ↑	67% ↑	63%	54%	46% ↓	47%	55%	83% ↑	84% ↑	88% ↑	25% ↓	48%	31% ↓	29% ↓	27% ↓	65% ↑	42% ↓	64% ↑	39% ↓	28% ↓	71% ↑
Don't know	13%	38% ↑	19%	10%	9%	7% ↓	12%	25% ↑	14%	10%	12%	6% ↓	11%	8%	10%	11%	22%	26% ↑	13%	0% ↓	17%	9% ↓	17% ↑	8% ↓	11%	3%	12%

# 07

## APPENDIX: DATA TABLES

# APPENDIX: DATA TABLES

## SECTION 01

Table 1 - QA1 On a scale of 0 to 10, where 0 is 'very dissatisfied' and 10 is 'very satisfied', how satisfied are you with your relationship with CASA? Base: All respondents; 2018 (n=1,168), 2020 (n=755)	Don't know	Very dissatisfied (0-1)	Dissatisfied (2-3)	Neutral (4-6)	Satisfied (7-8)	Very satisfied (9-10)
2020	1%	8%	9%↓	27%	32%	22%
2018	2%	8%	12%	25%	30%	23%

Table 2 - QA3. On a scale of 0 to 10, where 0 is 'very dissatisfied' and 10 is 'very satisfied', please rate how satisfied you are with the following aspects of CASA's performance. Base: All respondents 2020 (n=755)	Don't know	Very dissatisfied (0-1)	Dissatisfied (2-3)	Neutral (4-6)	Satisfied (7-8)	Very satisfied (9-10)
Respects your confidentiality	17%	6%	3%	15%	28%	32%
Operates with safety as its primary focus	5%	12%	6%	19%	25%	33%
Shares information & knowledge willingly	8%	11%	10%	21%	25%	26%
Provides competent & capable staff	10%	13%	8%	22%	25%	22%
Maintains an open and transparent relationship with you	8%	14%	9%	25%	21%	24%
Strives for operational excellence	12%	14%	10%	22%	22%	21%
Provides timely responses to queries or requests for information	9%	13%	10%	24%	23%	20%

Table 3 - QA3. On a scale of 0 to 10, where 0 is 'very dissatisfied' and 10 is 'very satisfied', please rate how satisfied you are with the following aspects of CASA's performance. Base: All respondents; 2018 (n=1,168), 2020 (n=755)	Don't know	Very dissatisfied (0-1)	Dissatisfied (2-3)	Neutral (4-6)	Satisfied (7-8)	Very satisfied (9-10)
Is efficient in its dealings with you	4%	14%	12%	22%	24%	23%
Actively helps stakeholders comply with regulations	12%	13%	10%	23%	23%	19%
Makes it clear who you need to contact within CASA	5%	13%	12%	28%	23%	19%
Is responsive to your needs	6%	16%	12%	25%	21%	20%
Builds a relationship of trust with you	8%	16%	12%	25%	18%	22%
Treats all stakeholders fairly and with respect	18%	15%	11%	20%	19%	18%
Behaves with strength and courage	17%	15%	9%	22%	20%	16%

Table 4 - QA3. On a scale of 0 to 10, where 0 is 'very dissatisfied' and 10 is 'very satisfied', please rate how satisfied you are with the following aspects of CASA's performance. Base: All respondents; 2018 (n=1,168), 2020 (n=755)	Don't know	Very dissatisfied (0-1)	Dissatisfied (2-3)	Neutral (4-6)	Satisfied (7-8)	Very satisfied (9-10)
Takes actions that are appropriate and in proportion to circumstances	12%	15%	12%	22%	21%	18%
Understands you/your business/organisation	16%	15%	13%	20%	19%	17%
Works collaboratively with industry	13%	16%	13%	20%	20%	17%
Balances consistency and flexibility	14%	15%	13%	25%	18%	14%
Is openly accountable for its actions	17%	20%	13%	19%	17%	15%
Is innovative and open to new ideas	14%	20%	14%	23%	17%	12%
Strives to minimise administrative costs & charges	15%	22%	15%	21%	14%	13%

# APPENDIX: DATA TABLES

## SECTION 01

Table 5 - QA4. On a scale of 0 to 10 where 0 is very poor and 10 is very good, how do you rate CASA's response to COVID-19 in terms of supporting Australian aviation through this challenging period?  
Base: All respondents; 2020 (n=755)

	Don't know	Very poor (0-1)	Poor (2-3)	Neutral (4-6)	Good (7-8)	Very good (9-10)
2020	22%	4%	4%	17%	24%	28%

Table 6 - QA5. Why is that? [If rating of 0-6 was provided to question, 'QA4. On a scale of 0 to 10 where 0 is very poor and 10 is very good, how do you rate CASA's response to COVID-19 in terms of supporting Australian aviation through this challenging period?]

Little communication/info from CASA / quiet	15%
Providing extensions (positive)	13%
Poor staff service (unavailable, unfriendly)	10%
Unclear / confusing regulations	9%
CASA have done very little / underperformed	8%
Not proactive or timely enough in offering advice / support	8%
No dealings with CASA during COVID	7%
Over-regulated / too many regulation changes	7%
Fee reduction was not enough / did not see it	5%
Good communication / support	5%
Extensions should have been longer	4%

Table 7 - QA5. Why is that? [If rating of 7-10 was provided to question, 'QA4. On a scale of 0 to 10 where 0 is very poor and 10 is very good, how do you rate CASA's response to COVID-19 in terms of supporting Australian aviation through this challenging period?]

Extensions granted (e.g. to medicals, pilot licences, flight tests)	32%
Acted in a timely manner / quick / proactive	13%
Understood industry concerns	9%
Good communication / clear info/guidelines provided	8%
Provided exemptions / relief from regulations	6%
Positive comment (general)	6%
Complied with COVID-safe practices	6%
Showed flexibility	5%
Negative comment about CASA's performance	3%
Kept operating during COVID / no issues	3%
Staff maintained availability / professionalism	3%

# APPENDIX: DATA TABLES

## SECTION 02

Table 8 - QD1. On a scale of 0 to 10, where 0 is 'very dissatisfied' and 10 is 'very satisfied', how satisfied are you with CASA's service delivery? Base: All respondents; 2018 (n=1,168), 2020 (n=755)	Don't know	Very dissatisfied (0-1)	Dissatisfied (2-3)	Neutral (4-6)	Satisfied (7-8)	Very satisfied (9-10)
2020	3%	11%	10%	27%↑	27%	22%
2018	4%	11%	9%	23%	29%	25%

Table 9 - QD2. How many times have you had direct contact with CASA staff over the past 12 months? Base: All respondents*; 2018 (n=1,163), 2020 (n=751) *Note: Respondents who provided a value over '100' were not included in this analysis.	None	Once	Twice	3-5 times	6-9 times	10-19 times	20 or more times
2020	31%	15%	11%↓	22%	7%	8%	6%
2018	28%	13%	16%	24%	7%	6%	6%

Table 10 - QD3. What was your most recent direct contact with CASA staff in relation to? Base: All respondents; 2018 (n=1,168), 2020 (n=755)	2020	2018
Apply for aviation medical	26%	27%
Apply for/renew flight crew licence	11%	12%
To seek clarification or further information on a regulation	11%	11%
Attended a meeting, seminar, presentation or forum	6%	7%
Apply for/renew an aircraft registration	4%↑	2%
To participate in an audit or safety inspection	4%	3%
Apply for/renew maintenance personnel licence	3%↓	7%
Apply for Drone Registration*	3%	-
Apply for/renew a remotely piloted aircraft operator's (ReOC) certificate*	2%	-
Apply for/renew an air operator's certificate	2%	4%
Apply for remotely piloted licence (RePL)*	2%	-
To access pilot guides and information	2%	1%
Apply for Remotely piloted aircraft (RPA) operator accreditation*	2%	-
Apply for an aviation reference number (ARN)	2%↓	7%
To complete a flight crew or aircraft maintenance engineer exam	1%	1%
Apply for/renew a maintenance repair organisation approval	1%	1%
Apply for/renew air traffic control licence	0%	0%
Other	16%	13%
No contact	1%	1%

# APPENDIX: DATA TABLES

## SECTION 02

Table 11 - QD4. On a scale of 0 to 10, where 0 is 'very dissatisfied' and 10 is 'very satisfied', please rate how satisfied you were during your most recent interaction with CASA staff that.... Base: All respondents; 2018 (n=1,168), 2020 (n=755)	Not applicable	Don't know	Very dissatisfied (0-1)	Dissatisfied (2-3)	Neutral (4-6)	Satisfied (7-8)	Very satisfied (9-10)
CASA staff were helpful	12%	1%	9%	5%	13%	22%	38%
CASA staff understood your issue	15%	2%	10%	4%	13%	21%	35%
You were given information or advice that answered your query or resolved your issue	16%	1%	10%	6%	14%	20%	34%
You were given information or advice that was consistent with information or advice you had previously been given	18%	1%	11%	5%	13%	18%	34%
CASA staff knew the history of your issue	26%	3%	9%	5%	13%	18%	27%
Your issue or query was processed in a timely manner	12%	1%	12%	6%	15%	19%	34%
Your transaction was completed with only reasonable time or costs incurred by you	12%	2%	14%	6%	16%	19%	31%

Table 12 - QH1. On a scale of 0 to 10 where 0 is 'very dissatisfied' and 10 is 'very satisfied', how satisfied are you with CASA's ongoing dialogue with industry? Base: All respondents; 2018 (n=1,168), 2020 (n=755)	Don't know	Very dissatisfied (0-1)	Dissatisfied (2-3)	Neutral (4-6)	Satisfied (7-8)	Very satisfied (9-10)
2020	13%	13%	12%	23%	22%	17%
2018	14%	12%	10%	24%	25%	14%

Table 13 - QH2. On a scale of 0 to 10, where 0 is 'strongly disagree' and 10 is 'strongly agree', please indicate your level of agreement with the following statements. Base: All respondents; 2018 (n=1,168), 2020 (n=755)	Don't know	Strongly disagree (0-1)	Disagree (2-3)	Neutral (4-6)	Agree (7-8)	Strongly agree (9-10)
I have a professional and courteous relationship with CASA staff	11%	5%	3%	16%	22%	42%
CASA is vital in ensuring aviation safety in Australia	3%	9%	6%	15%	18%	48%
CASA provides me with information which is relevant to my aviation activities	4%	11%	9%	27%	23%	26%
CASA is actively involved in relevant committees and events	35%	8%	6%	18%	16%	17%
If I need assistance or information I know who to contact in CASA to get an answer to my question	8%	16%	11%	22%	19%	24%
CASA values input from industry	20%	17%	11%	19%	15%	17%
CASA takes the time to get to know people in the industry	27%	15%	10%	21%	14%	14%



# APPENDIX: DATA TABLES

## SECTION 03

Table 14 - QB1. On a scale of 0 to 10, where 0 is 'very difficult' and 10 is 'very easy', how easy or difficult is it for you to fully comply with all aviation safety regulations relevant to your role or activities? Base: All respondents; 2018 (n=1,168), 2020 (n=755)	Don't know	Very difficult (0-1)	Difficult (2-3)	Neutral (4-6)	Easy (7-8)	Very easy (9-10)
2020	2%	9%	11%	24%	28%	26%
2018	2%	11%	13%	24%	28%	22%

Table 15 - QB2. On a scale of 0 to 10, where 0 is 'not at all confident' and 10 is 'very confident', how confident are you in your ability to comply with all aviation safety regulations relevant to your role? Base: All respondents; 2018 (n=1,168), 2020 (n=755)	Don't know	Not at all confident (0-1)	(2-3)	Neutral (4-6)	(7-8)	Very confident (9-10)
2020	2%	4%	6%	17%	29%	43%
2018	1%	5%	6%	16%	28%	43%

Table 16 - QB3. On a scale of 0 to 10, where 0 is 'strongly disagree' and 10 is 'strongly agree', please indicate your level of agreement with the following statements. Base: All respondents; 2018 (n=1,168), 2020 (n=755)	Don't know	Strongly disagree (0-1)	Disagree (2-3)	Neutral (4-6)	Agree (7-8)	Strongly agree (9-10)
Regulations play a key role in ensuring I operate safely	1%	9%	7%	18%	24%	41%
I have a sound understanding of all regulations governing my aviation activities	1%	6%	6%	21%	34%	33%
CASA themselves have a sound understanding of the regulations governing my activities	10%	13%	8%	19%	21%	28%
I can easily interpret how regulations affect the way I operate	1%	13%	11%	27%	26%	22%
CASA inspectors have a consistent understanding of regulations and apply rules consistently	25%	14%	8%	16%	17%	20%
Regulations covering my activities are easy to understand	1%	16%	13%	24%	25%	20%
CASA explains the regulations & how they affect industry stakeholders in a clear & succinct manner	6%	14%	13%	24%	23%	20%

Table 17 - QE1. On a scale of 0 to 10 where 0 is 'very dissatisfied' and 10 is 'very satisfied', how satisfied are you with the ways CASA develops aviation safety regulations? Base: All respondents; 2018 (n=1,168), 2020 (n=755)	Don't know	Very dissatisfied (0-1)	Dissatisfied (2-3)	Neutral (4-6)	Satisfied (7-8)	Very satisfied (9-10)
2020	11%	16%	11%	20%	21%	20%
2018	13%	15%	11%	20%	21%	19%

Table 18 - QE2. On a scale of 0 to 10, where 0 is 'strongly disagree' and 10 is 'strongly agree', please indicate your level of agreement with the following statements. Base: All respondents; 2018 (n=1,168), 2020 (n=755)	Don't know	Strongly disagree (0-1)	Disagree (2-3)	Neutral (4-6)	Agree (7-8)	Strongly agree (9-10)
My input to regulation and reform would be useful to CASA	20%	6%	5%	20%	24%	25%
CASA clearly communicates the strategic intent of reforms to aviation safety regulations	11%	14%	11%	23%	21%	20%
CASA provides me with adequate opportunities to provide input on regulation development and reform	14%	13%	10%	25%	18%	21%
CASA always demonstrates the case underpinning aviation safety regulation reform	16%	15%	11%	22%	17%	19%
CASA does a good job of translating my legal obligations into practical guidance	12%	16%	12%	24%	19%	18%
Current aviation safety regulations represent the most current learning and innovation in the industry	17%	15%	12%	21%	18%	17%
CASA always consults with the most appropriate people in industry when developing and reforming aviation safety regulations	25%	19%	11%	17%	13%	15%

# APPENDIX: DATA TABLES

## SECTION 03

Table 19 - QE5. On a scale from 0 to 10, where 0 is 'very unimportant' and 10 is 'very important', how important would each of the following factors be in terms of encouraging you to participate in face-to-face or written consultation with CASA? Base: All respondents; 2018 (n=1,168), 2020 (n=755)	Don't know	Very unimportant (0-1)	Unimportant (2-3)	Neutral (4-6)	Important (7-8)	Very important (9-10)
The topic of the consultation is relevant or interesting to me	9%	5%	3%	19%	29%	35%
Receiving feedback on how my contribution was used	13%	6%	6%	20%	26%	29%
Feeling like my contribution would be used to make real change	14%	7%	5%	19%	25%	30%
A face-to-face session is held in a location near me	13%	7%	5%	20%	24%	30%
There is an opportunity to network with others in my industry	12%	7%	4%	25%	26%	26%
The invitation to participate came to me personally	14%	9%	5%	24%	24%	24%
There is an opportunity to meet people from CASA whom I would like to meet	15%	8%	7%	24%	24%	22%

Table 20 - QG1. On a scale of 0 to 10, where 0 is 'very unlikely' and 10 is 'very likely', how likely would you be to make a voluntary safety report (e.g. alert CASA voluntarily in the case of non-compliance with your regulatory obligations) in situations of material non-compliance with safety regulations? Base: All respondents; 2018 (n=1,168), 2020 (n=755)	Don't know	Very unlikely (0-1)	Unlikely (2-3)	Neutral (4-6)	Likely (7-8)	Very likely (9-10)
2020	7%↓	11%	6%	17%	21%	39%
2018	10%	10%	6%	14%	23%	37%

Table 21 - QF1. On a scale of 0 to 10, where 0 is 'very dissatisfied' and 10 is 'very satisfied', how satisfied are you with the consistency of CASA's decision making? Base: All respondents; 2018 (n=1,168), 2020 (n=755)	Don't know	Very dissatisfied (0-1)	Dissatisfied (2-3)	Neutral (4-6)	Satisfied (7-8)	Very satisfied (9-10)
2020	11%↓	14%	12%	25%	21%	17%
2018	17%	14%	10%	24%	21%	15%

Table 22 - QF2. On a scale of 0 to 10, where 0 is 'strongly disagree' and 10 is 'strongly agree', please indicate your level of agreement with the following statements. Base: All respondents; 2018 (n=1,168), 2020 (n=755)	Don't know	Strongly disagree (0-1)	Disagree (2-3)	Neutral (4-6)	Agree (7-8)	Strongly agree (9-10)
CASA are consistent in the decisions that are made	15%	16%	10%	24%	19%	15%
CASA staff are consistent in how they make decisions	19%	17%	9%	21%	18%	16%
I clearly understand why CASA makes the decisions it does	9%	19%	12%	24%	19%	17%
CASA makes decisions which reflect an understanding of my aviation activities and/or business	12%	19%	12%	21%	19%	16%

# APPENDIX: DATA TABLES

## SECTION 03

Table 23 - Q12. Have you or your organisation been subject to any CASA audit activity over the past two years? Base: All respondents; 2018 (n=1,168), 2020 (n=755)	Yes	No	Don't know
2020	33%	55%	13%
2018	36%	51%	14%

Table 24 - Q11. On a scale of 0 to 10 where 0 is 'very dissatisfied' and 10 is 'very satisfied', how satisfied are you with the way CASA performs its audit and compliance activities (e.g. ramp checks, etc.)? Base: All respondents; 2018 (n=1,168), 2020 (n=755)		Don't know	Very dissatisfied (0-1)	Dissatisfied (2-3)	Neutral (4-6)	Satisfied (7-8)	Very satisfied (9-10)
Total	2020	32% <span>↓</span>	8%	6%	18% <span>↑</span>	18%	18%
	2018	41%	7%	4%	14%	18%	16%
Have been subject to CASA audit in past 2 years	2020	10%	12%	7%	23%	26%	22%
	2018	13%	13%	7%	19%	29%	20%
Have NOT been subject to CASA audit in past 2 years	2020	44% <span>↓</span>	6% <span>↑</span>	6%	16%	14%	14%
	2018	59%	3%	3%	12%	10%	13%

Table 25 - Q13. On a scale of 0 to 10, where 0 is 'strongly disagree' and 10 is 'strongly agree', please indicate your level of agreement with the following statements. Base: All respondents; 2018 (n=1,168), 2020 (n=755)		Don't know	Strongly disagree (0-1)	Disagree (2-3)	Neutral (4-6)	Agree (7-8)	Strongly agree (9-10)
CASA's auditing role is critical to the safety of aviation in Australia	Total (2020, n=755)	16%	7%	4%	17%	17%	40%
	Have been subject to CASA audit in past 2 years (2020, n=246)	0%	9%	4%	22%	19%	45%
	Have NOT been subject to CASA audit in past 2 years (2020, n=413)	24%	5%	3%	15%	15%	37%
CASA staff undertake audit activities in a professional manner	Total (2020, n=755)	38%	5%	4%	11%	17%	25%
	Have been subject to CASA audit in past 2 years (2020, n=246)	3%	7%	5%	15%	28%	41%
	Have NOT been subject to CASA audit in past 2 years (2020, n=413)	57%	4%	3%	9%	9%	17%

Table 26 - Q13. On a scale of 0 to 10, where 0 is 'strongly disagree' and 10 is 'strongly agree', please indicate your level of agreement with the following statements. Base: All respondents; 2018 (n=1,168), 2020 (n=755)		Don't know	Strongly disagree (0-1)	Disagree (2-3)	Neutral (4-6)	Agree (7-8)	Strongly agree (9-10)
CASA staff are fair and reasonable in dealing with those subject to audit	Total (2020, n=755)	39%	7%	4%	15%	15%	21%
	Have been subject to CASA audit in past 2 years (2020, n=246)	4%	9%	6%	22%	24%	35%
	Have NOT been subject to CASA audit in past 2 years (2020, n=413)	58%	7%	2%	11%	9%	13%
Audits are undertaken in a constructive manner to improve safety	Total (2020, n=755)	34%	8%	4%	15%	16%	23%
	Have been subject to CASA audit in past 2 years (2020, n=246)	2%	13%	7%	19%	25%	35%
	Have NOT been subject to CASA audit in past 2 years (2020, n=413)	51%	6%	2%	13%	11%	16%



THANK YOU!