

FASTER  
HORSES



Australian Government  
Civil Aviation Safety Authority

# CASA STAKEHOLDER SATISFACTION RESEARCH

**JUNE 2023**

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# BACKGROUND & OBJECTIVES

## BACKGROUND

- + The Civil Aviation Safety Authority (CASA) is seeking to develop a more customer centric philosophy with stakeholders and clients in its aim to make dealing with the organisation easier, cheaper and more efficient.
- + Following previous stakeholder satisfaction studies in 2015 and 2018 to track stakeholder satisfaction, in 2020 CASA moved to a shorter, more agile stakeholder survey approach using a shorter, more succinct survey. The 2023 survey is an even more streamlined version of the questionnaire, with the aim to reduce the length and effort required, given the number of other research requests presented to stakeholders.
- + This survey approach aims to ensure CASA obtains timely feedback on its performance and key areas where stakeholders feel improvement is needed.
- + The aviation sector is continuing to undergo rapid change with the increasing uptake in the ownership and operation of remotely piloted aircraft (RPA 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 pilots, aircraft owners and maintenance personnel.

## RESEARCH OBJECTIVES

- + Measure stakeholders' satisfaction with CASA and the key drivers of satisfaction.
- + Assess levels of satisfaction with CASA's safety regulations and compliance, service delivery, consistency of decision making and safety focus, as well as what the future focus should be for the regulator.
- + Explore whether ratings of CASA's performance and relationship with stakeholders has changed from previous results collected in 2020.
- + Provide a greater depth of stakeholder satisfaction and areas for improvement via a series of qualitative in-depth interviews.



# 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 a 5-minute survey.
- + A total of n=683 stakeholders completed the survey, representing a response rate of 10.4%.
- + Fieldwork was completed between 17th April and 15th May 2023.



## Depth interviews

- + n=12<sup>1</sup> depth interviews of 30 minutes' duration were conducted via Teams or Zoom
- + The interviews were conducted among targeted stakeholders representing key industry associations and aviation sectors, as identified by CASA
- + CASA sent out a PAL (primary approach letter) prior to Faster Horses recruiting the stakeholders
- + Interviews were conducted between May and June 2023

## REPORTING NOTES

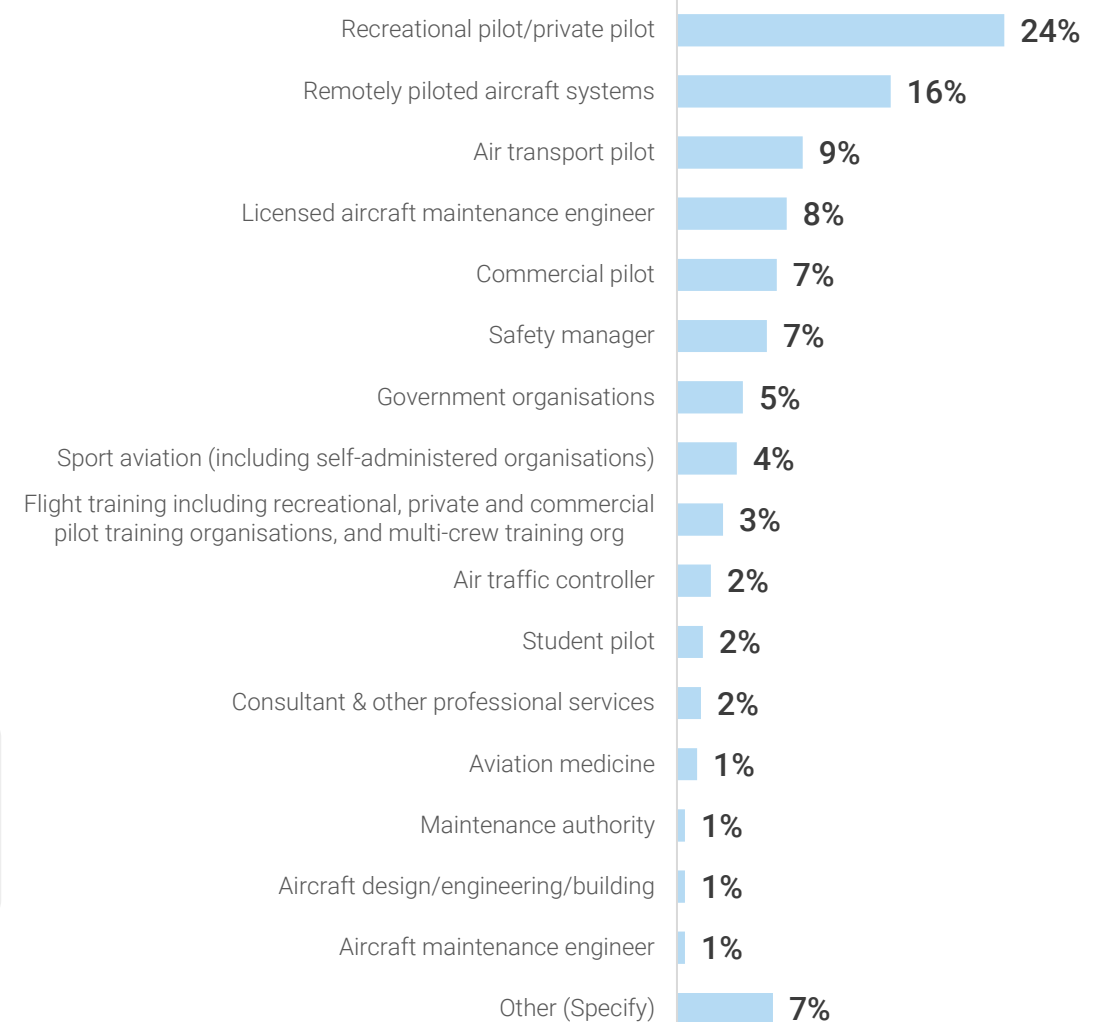
- + Significance testing has been conducted by comparing the results between 2023, 2020 and 2018; further significance testing has been conducted across demographics in the Appendix section.
- + Differences that are significantly high have been shaded in blue in tables or marked with an upwards arrow (↑), and conversely, significantly low differences are shaded in red in tables or marked with a downwards arrow (↓) (shown in charts that present the data across the three waves).
- + Due to rounding, the percentage labels displayed in charts may not always add exactly to 100% (instead summing to 99% or 101%). Rounding also means the sum of the top or bottom two box percentages reported in the text may differ slightly (by 1%) to what the sum of the chart percentages shown would be by simply adding them.

<sup>1</sup>A further 3 stakeholders had agreed to participate but did not follow through with the interview.

# SAMPLING APPROACH: ONLINE SURVEY

- + Consistent with previous surveys, a stratified random sampling approach was used again for the current survey. This approach involves drawing potential respondents randomly within specific quotas to ensure the sample is both robust and 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:
  - RPAS Operators
  - Remote Pilot Licence Holders
  - 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 683 completed surveys were returned by stakeholders by the end of the survey period.
- + The current primary role results are not comparable with previous years as the category options were updated in 2023 by CASA to reflect their current stakeholder roles.

## CURRENT PRIMARY ROLE IN THE AVIATION SECTOR



Base: All respondents; 2023 (n=683)

D2. Which one of the following best describes your current primary role in the aviation sector?

# KEY FINDINGS



OVERALL SATISFACTION IS REASONABLE AND STEADY, HOWEVER SLOW SERVICE DELIVERY IS AN ISSUE FOR STAKEHOLDERS

- + Stakeholders gave an average satisfaction rating of 6.1/10 to describe their relationship with CASA. While this is reasonable and at an overall level has remained consistent with previous years, there has been a decline in the proportion of 'very satisfied' stakeholders.
- + The key area of dissatisfaction is slow service, as mentioned by 19% of stakeholders. According to the qualitative participants, delays in approvals and applications cause frustration and prevent organisations and associations from operating efficiently.
- + Further evidence of this is the steady decline in stakeholder satisfaction with CASA's service delivery across the surveys, where the average has dropped from 6.2 in 2018, to 6.0 in 2020 to a low of 5.7 in the current survey. This is driven by a decline in the proportion of stakeholder who are 'very satisfied' with this aspect (25% in 2018 to currently 19%).



CASA'S DEVELOPMENT OF PLAIN ENGLISH GUIDES AND SAFETY EDUCATION ACTIVITIES AND INITIATIVES ARE POSITIVELY VIEWED

- + Stakeholders are very positive about the development of the plain English guides, with a satisfaction rating of 7.1. The qualitative participants mentioned the guides are easily digestible and highly beneficial to industry, especially in sectors that may not have an aviation background.
- + Stakeholders are also positive about CASA's safety education activities and initiatives across various areas (satisfaction of 6.9) and are pleased with the high quality and engaging material provided via seminars, podcasts and videos.



STAKEHOLDERS ARE FINDING IT EASIER TO COMPLY WITH REGULATIONS, DESPITE FAMILIARITY WITH CASA'S REGULATORY PHILOSOPHY BEING LOW

- + The majority of stakeholders find it easy to comply with aviation safety regulations, and this has increased across the surveys (from an average of 5.9 in 2018 to 6.3 in the current survey).
- + Furthermore, stakeholders are generally confident in their ability to comply with the regulations (average of 7.2).
- + However, familiarity with CASA's regulatory philosophy is fairly low, with only 36% familiar (rated 7-10), and a similar proportion not at all familiar (rated 0-3 or unsure).
- + Opinion is divided as to whether CASA follows their regulatory philosophy; around half of those familiar with it (48%) believe it is followed (rated 7-10) and a similar proportion think otherwise (rated 0-6 or don't know).



SIMPLIFYING THE RULES AND PROCESSES AND CLEAR AND CONSISTENT DECISION MAKING SHOULD BE CASA'S FUTURE FOCUS

- + Seven in ten stakeholders (69%) believe simplifying the rules and processes should be a focus for CASA over the next 12-24 months, and for over a third (36%) this is considered *the most important* area to focus on.
- + Consistency and clarity of decision-making also remains a key area for improvement for CASA (with average scores of 5.3 and 5.1 respectively).
- + When it comes to consistency, CASA also needs to balance this with flexibility, as this is an area with lower relative satisfaction (5.3).





# 01

**OVERALL SATISFACTION**  
**ONLINE SURVEY FINDINGS**

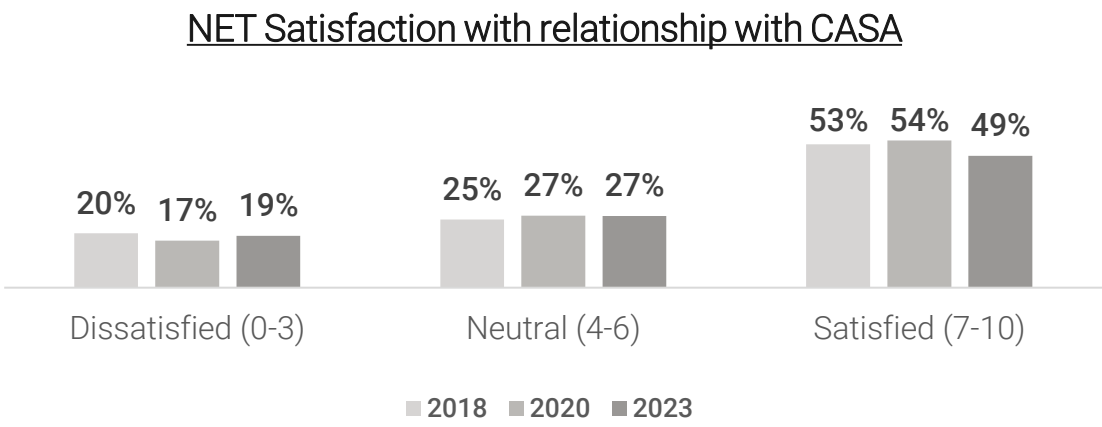
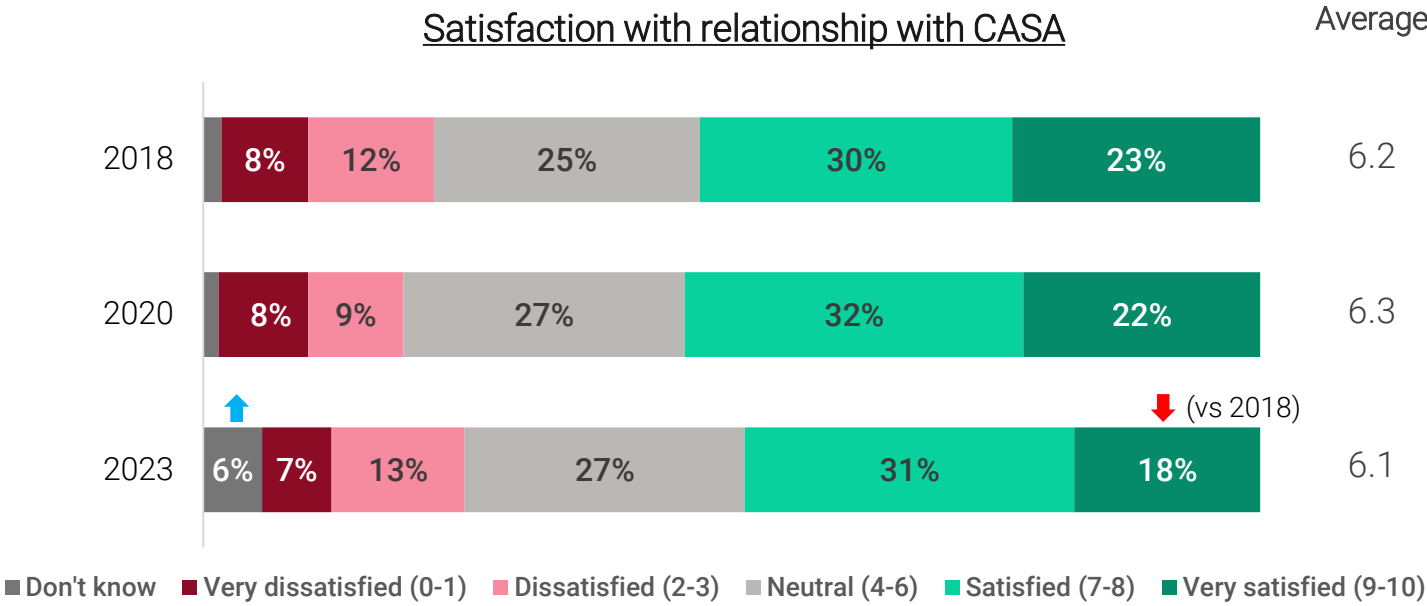
# OVERALL SATISFACTION REMAINS UNCHANGED, BUT FEWER ARE VERY SATISFIED SINCE 2018

Half the stakeholders (49%) are satisfied with their relationship with CASA, and 18% are very satisfied; a proportion which has declined since 2018 when it was 23%.

One in five stakeholders (19%) report they are dissatisfied, which is consistent with previous years.

Similarly, around one in four feel neutral about CASA (27%) and this has remained consistent across the surveys.

A higher proportion of stakeholders this year report they are unsure of their satisfaction with their relationship with CASA, at 6%.



Base: All respondents; 2018 (n=1,168), 2020 (n=755), 2023 (n=683)  
Q1a. 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?  
Significant differences between years at the 95% confidence interval level indicated by ↑↓



# SLOW SERVICE DELIVERY DRIVES DISSATISFACTION AMONGST STAKEHOLDERS

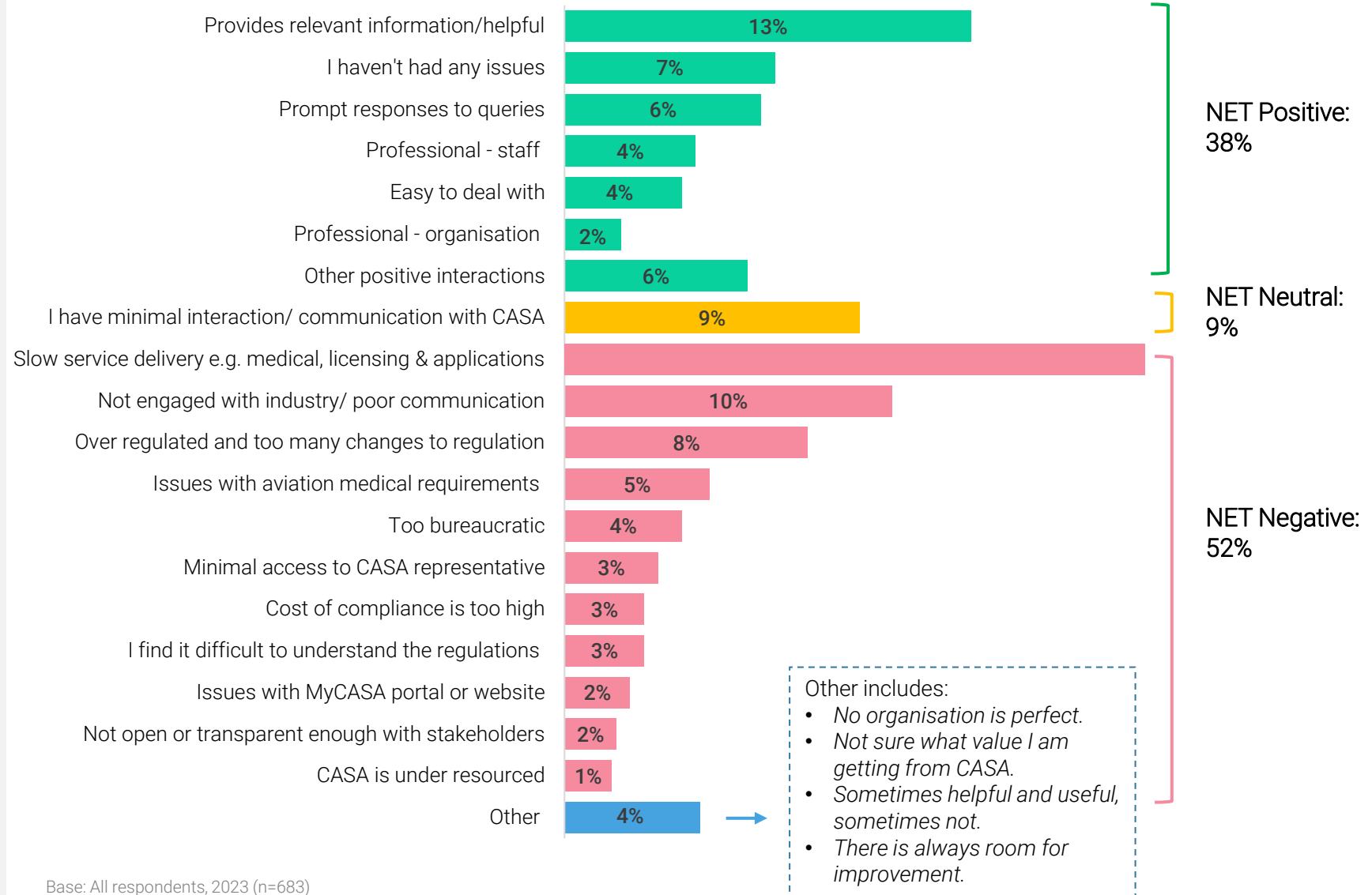
Overall, there were more negative than positive comments, with half of the stakeholders (52%) mentioning a negative aspect, compared with just over a third saying something positive (38%).

Positive aspects included the provision of relevant and helpful information, not experiencing any issues to date and prompt responses to queries.

Slow service delivery (eg. medical, licensing and applications) is a key area of concern for stakeholders, as mentioned by 19%. Stakeholders who are very dissatisfied (rating of 0-1) are significantly more likely to mention this as a reason for their low rating (36%). These stakeholders are also more likely to cite over regulation as a reason for dissatisfaction (at 23%).

Disengagement with industry is also mentioned as a reason for a lower satisfaction rating.

## Reasons for satisfaction rating for CASA relationship



# SATISFACTION ACROSS ALL ASPECTS OF CASA’S PERFORMANCE HAS MARGINALLY INCREASED SINCE 2020

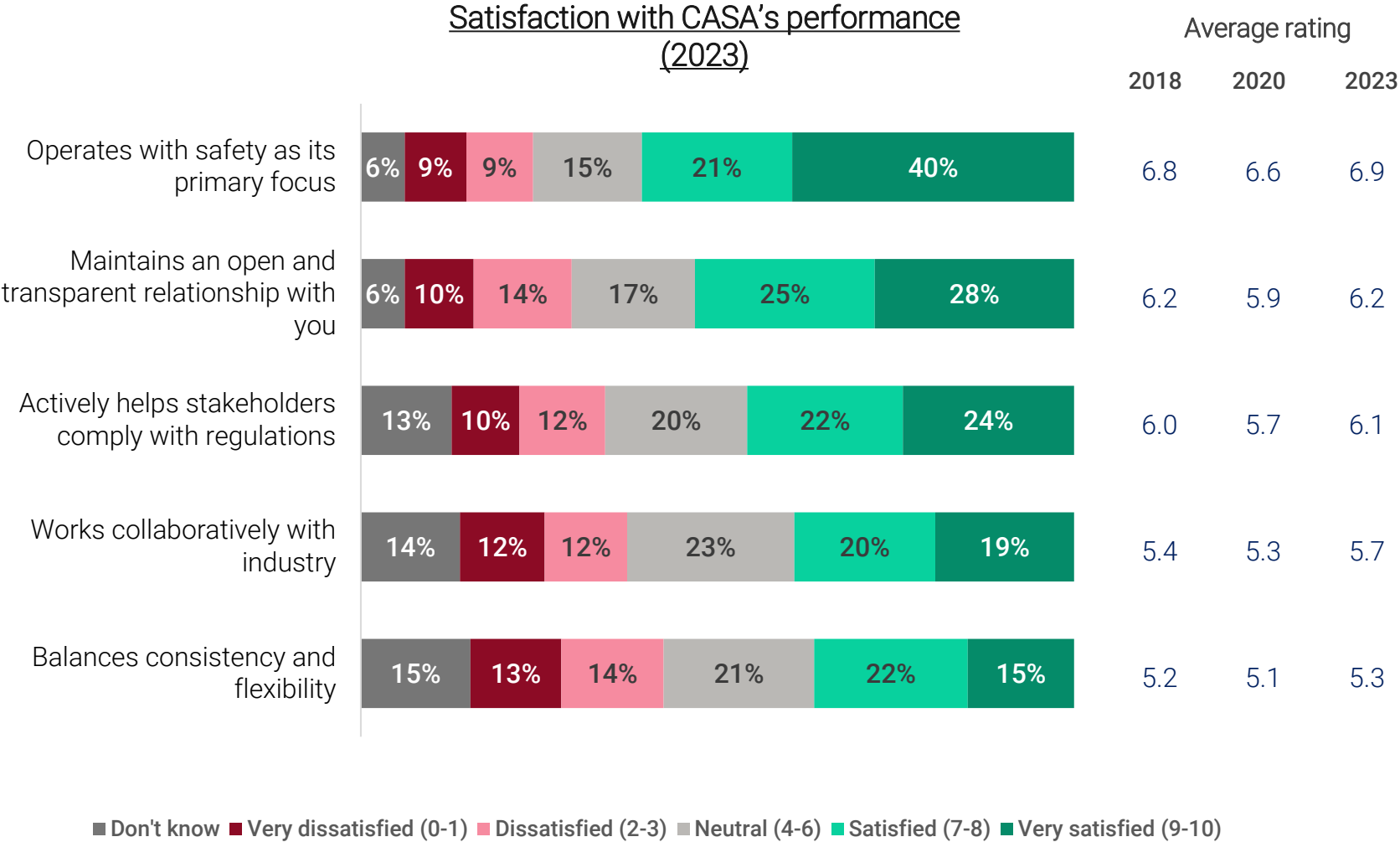
Stakeholders were asked to rate their satisfaction across specific aspects of CASA’s performance.

CASA rates best on operating with safety as its primary focus (61% satisfied; 40% very satisfied). Following this, satisfaction was also high for the transparency of the relationship (53% satisfied) and actively helping with regulation compliance (46%).

The area rated the lowest was balancing consistency and flexibility (36% satisfied and 27% dissatisfied), followed by working collaboratively (39% satisfied and 23% dissatisfied).

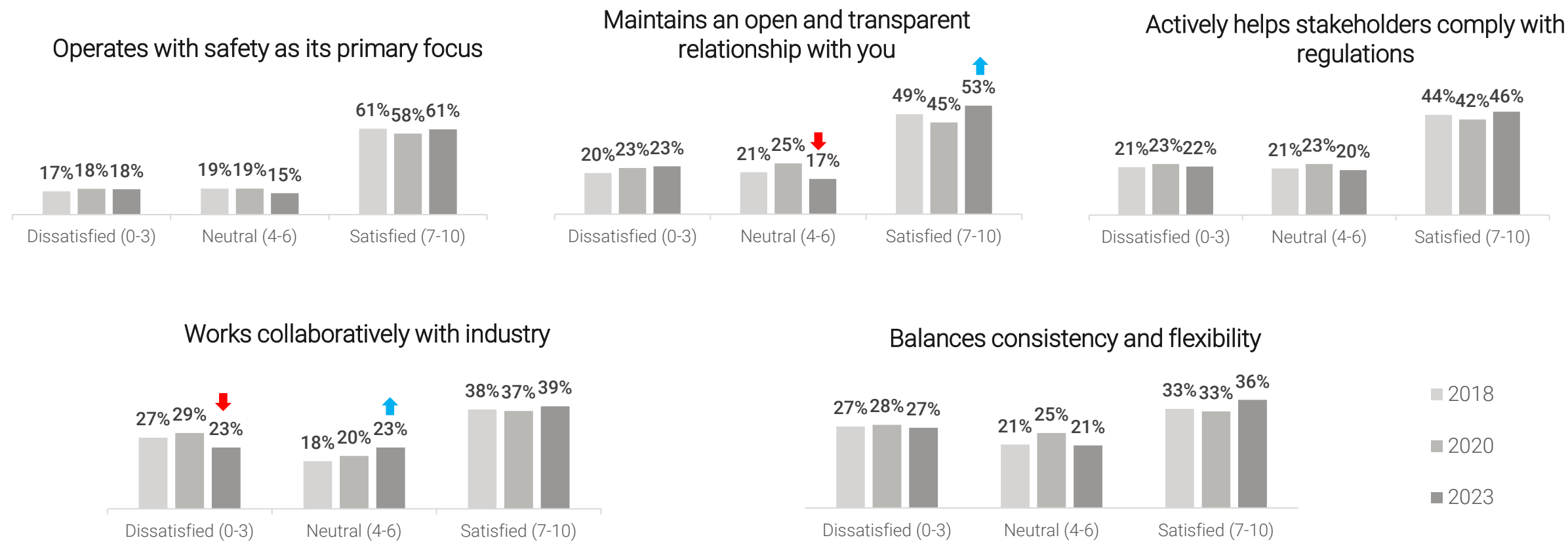
The mean scores (averages) for all aspects have marginally increased since 2020, suggesting there has been an increase in satisfaction across all aspects (albeit not statistically significant).

The following page shows the percentage changes across the surveys for these attributes.



Base: All respondents; 2018 (n=1,168), 2020 (n=755), 2023 (n=683)  
 Q2. 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.

# SATISFACTION WITH TRANSPARENCY HAS INCREASED AND FEWER ARE DISSATISFIED WITH THE COLLABORATIVE ASPECT OF CASA'S RELATIONSHIP



Base: All respondents; 2018 (n=1,168), 2020 (n=755), 2023 (n=683)  
Q2. 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.  
Significant differences between years at the 95% confidence interval level indicated by

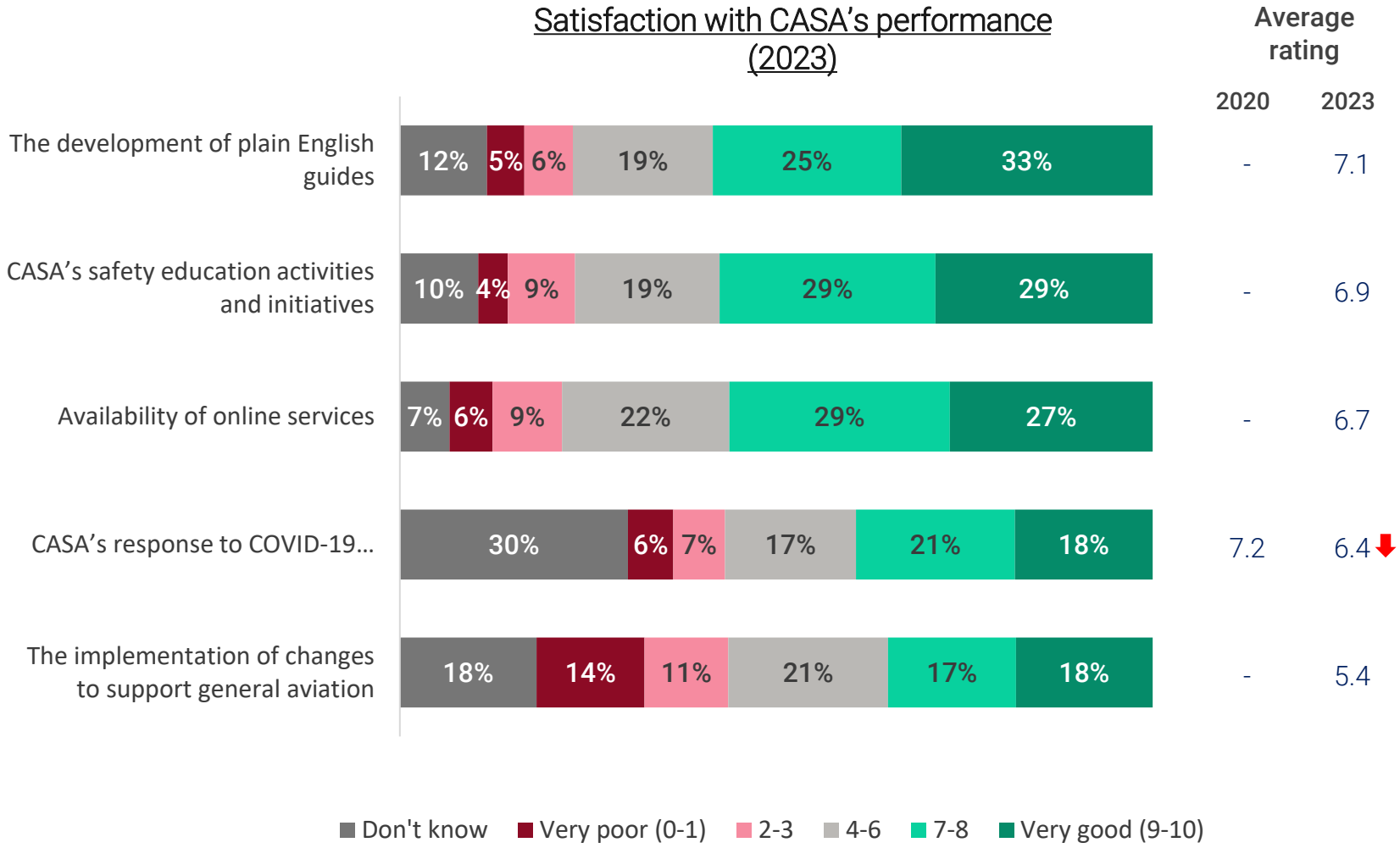
# CASA IS DELIVERING ON PLAIN ENGLISH GUIDES AND SAFETY EDUCATION

Nearly three in five believe that CASA’s work in developing plain English guides has had a positive impact for stakeholders; 58% rate it good (7-10) and a third rate this aspect as very good (9-10).

The same proportion rated CASA’s safety education activities and initiatives as good (58%). This was followed by the availability of online services (56%).

On balance, three times as many stakeholders are positive than negative about CASA’s COVID-19 response in terms of supporting Australian aviation through the very challenging period (39% vs. 13%), a sizeable proportion (30%).

Overall stakeholders are significantly less positive about CASA’s performance on this aspect, compared with 2020. This may be due to COVID being less relevant to them now compared to 2020, when the impact of the pandemic was more prevalent and top of mind.



Base: All respondents; 2020 (n=755), 2023 (n=683)  
 Q3. On a scale of 0 to 10 where 0 is 'very poor' and 10 is 'very good', how do you rate CASA on the following aspects?  
 Indicates a significant difference between 2023 and 2022 means at the 95% confidence interval level ▲ ▼

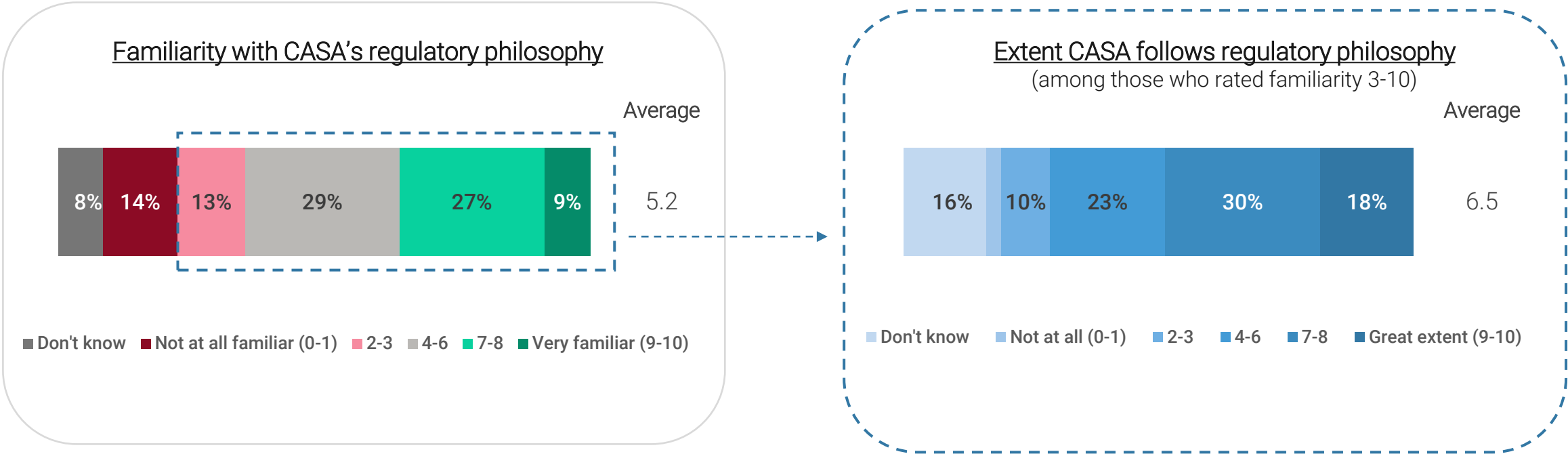
# 02

**SAFETY REGULATIONS/COMPLIANCE**  
**ONLINE SURVEY FINDINGS**

# FAMILIARITY WITH CASA’S REGULATORY PHILOSOPHY IS LOW, AND THERE ARE MIXED PERCEPTIONS AROUND THE EXTENT TO WHICH CASA FOLLOWS IT

Questions around CASA’s regulatory philosophy were added this year. Just over a third (36%) are familiar with CASA’s regulatory philosophy (rated 7-10), but only one in ten (9%) are very familiar (rated 9-10). Just over a third (35%) are not familiar with the philosophy (rated 0-3) or are unsure.

Every second stakeholder familiar with it (48%) believes CASA follows their regulatory philosophy, although a similar proportion (52%) think otherwise (rated 0-6 or don’t know). (New question 2023)



Base: All respondents; 2023 (n=683)  
 \*Q4a. On a scale of 0 to 10, where 0 is 'not at all familiar' and 10 is 'very familiar', how familiar are you with CASA's regulatory philosophy? (new question 2023)

Base: Familiar with CASA’s regulatory philosophy (rated 3-10) (n=483)  
 \*Q4b. To what extent do you think CASA follows this regulatory philosophy, on a scale of 0 to 10, where 0 is 'not at all' and 10 is 'to a great extent'? (new question 2023)

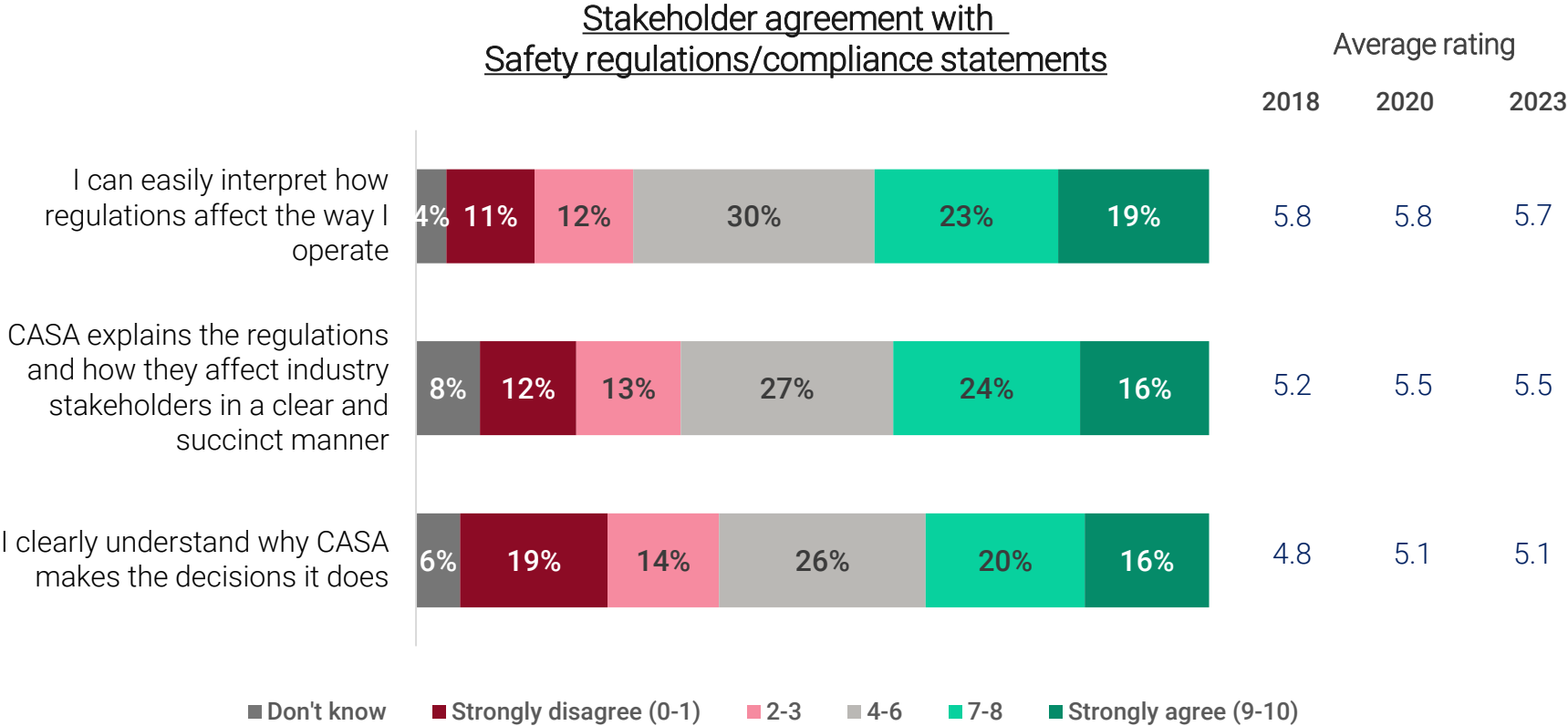


# THERE CONTINUES TO BE A LACK OF CLARITY AROUND CASA’S DECISION- MAKING

Around two in five stakeholders agree they can easily interpret how regulations affect the way they operate (42% agree) and a similar proportion (40%) believe CASA clearly explains the regulations and how they affect industry. One in four however disagree with each of these statements (24% and 25% respectively).

Opinion is more divided around whether stakeholders clearly understand CASA’s decisions. Just over a third agree (36%), but a similar proportion (33%) disagree. Despite a greater proportion of stakeholders claiming to be able to interpret regulations, there continues to be comparatively lower agreement that (5.5 average) or why CASA makes the decisions it does (5.1 average).

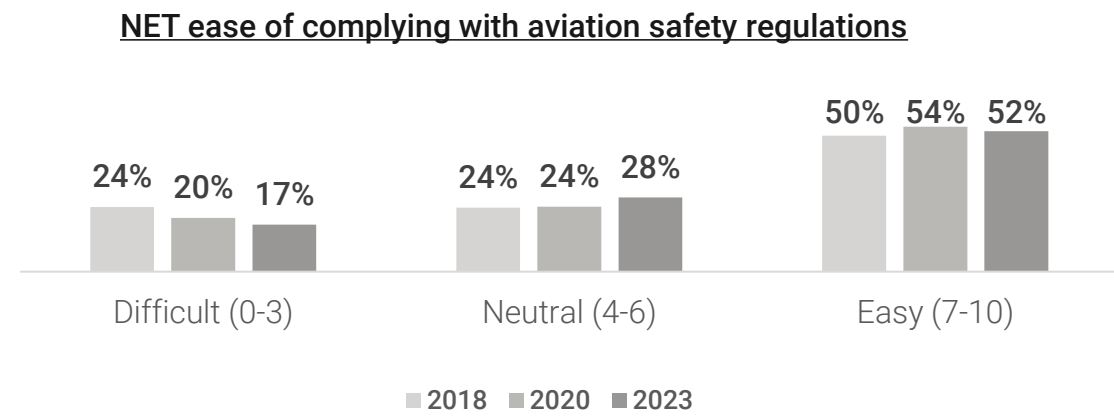
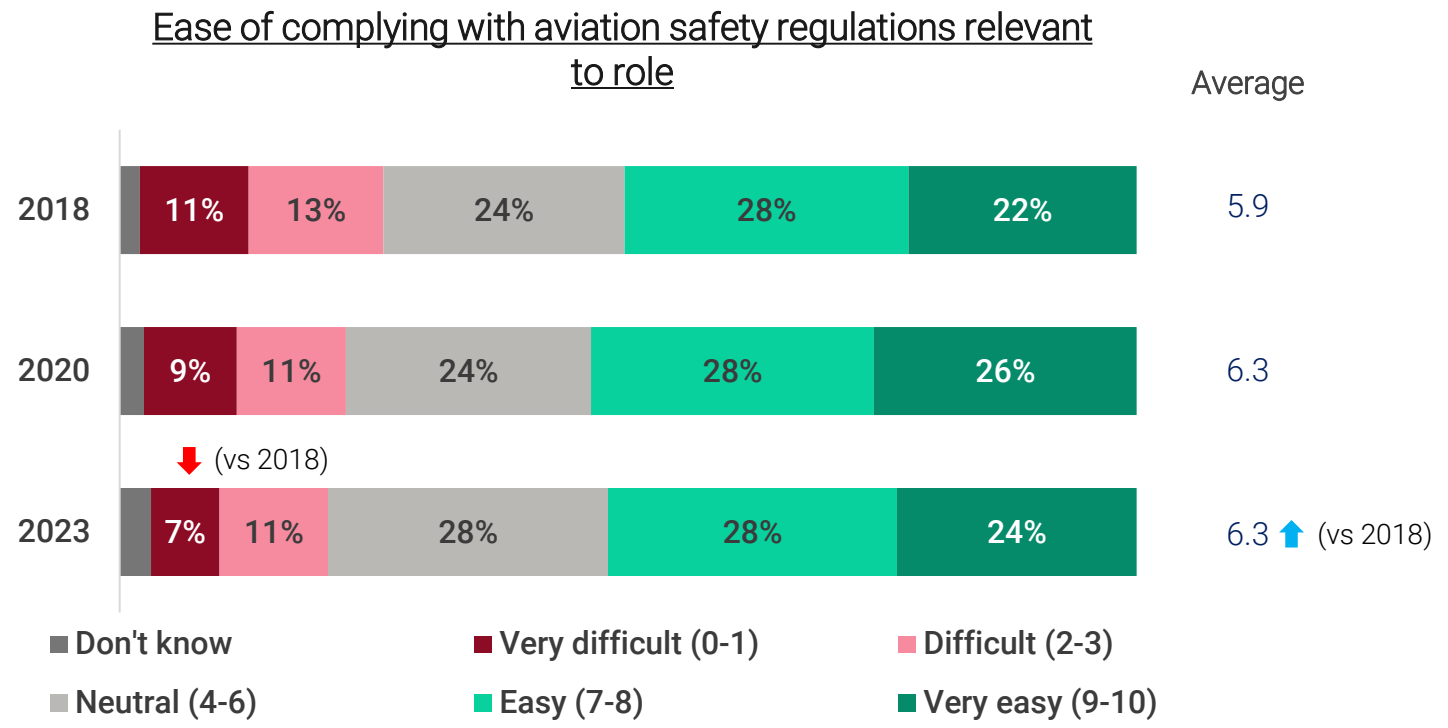
There has been no improvement across these areas since 2020.



# OVERALL STAKEHOLDERS ARE FINDING IT EASIER TO COMPLY WITH ALL AVIATION SAFETY REGULATIONS

Just over half the stakeholders find it easy to comply with aviation safety regulations relevant to their role (52%), and this is three times the proportion who find this difficult (17%).

There has been a significant increase in the overall rating (mean score) since 2018, and this is driven by a decline in the proportion saying they find it very difficult.

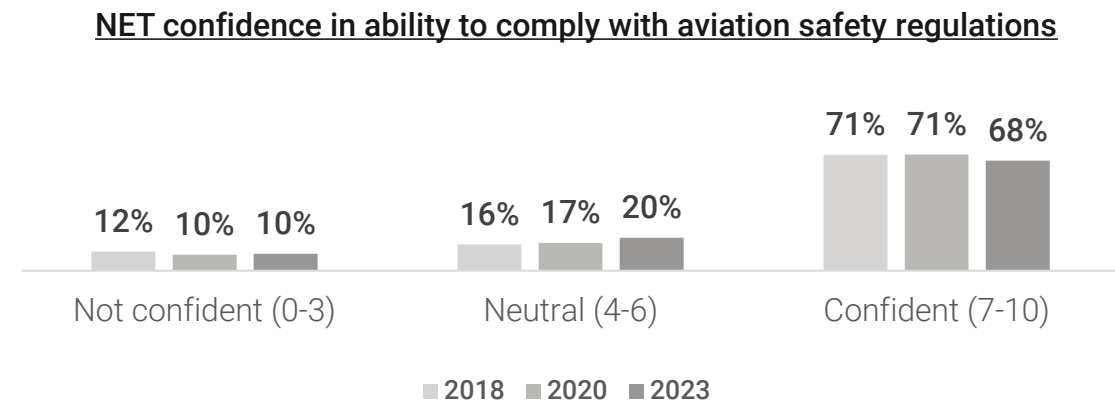
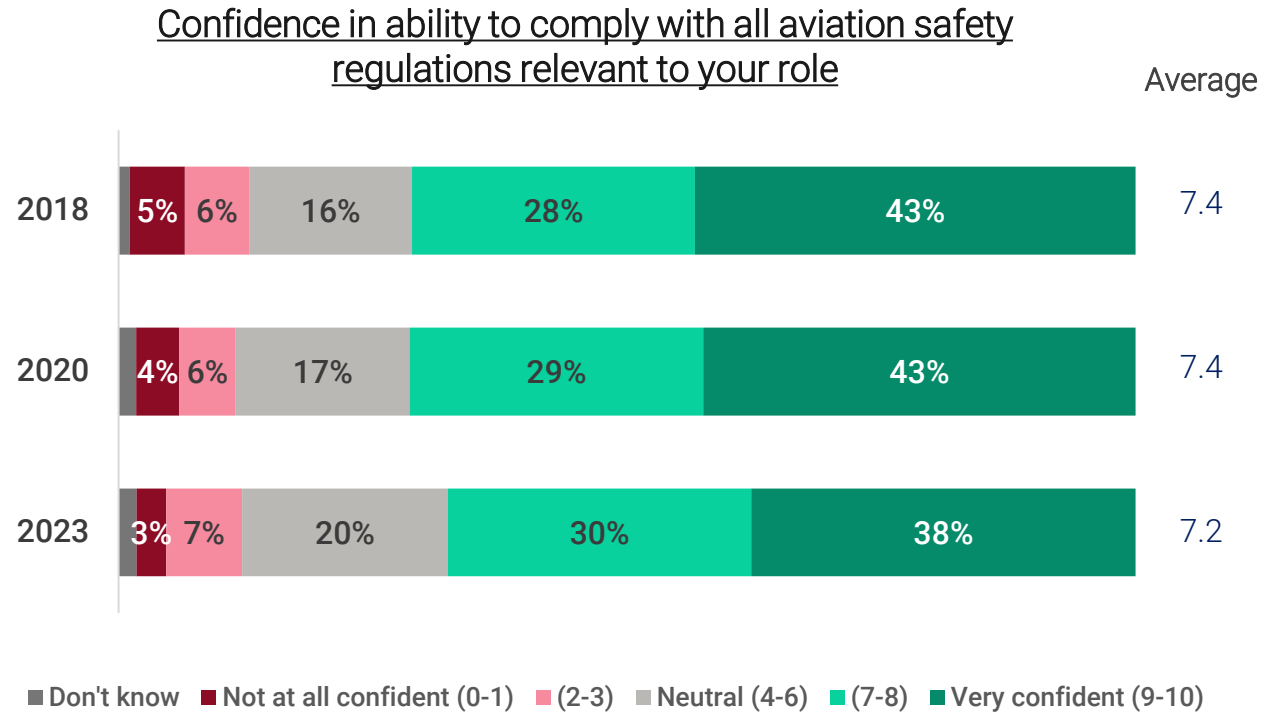


Base: All respondents; 2018 (n=1,168), 2020 (n=755), 2023 (n=683)  
 Q6a. On a scale of 0 to 10, where 0 is 'very difficult' and 10 is 'very easy', how easy or difficult is it for you to fully comply with all aviation safety regulations relevant to your role or activities?  
 Significant differences between years at the 95% confidence interval level indicated by ↑↓

# STAKEHOLDER'S CONFIDENCE IN ABILITY TO COMPLY WITH ALL AVIATION SAFETY REGULATIONS REMAINS HIGH

The majority of stakeholders are confident in their ability to comply with aviation safety regulations (68%) and 38% are very confident (rated 9-10).

While there has been a slight decline in the average rating since 2020, the change is not significant.





# 03

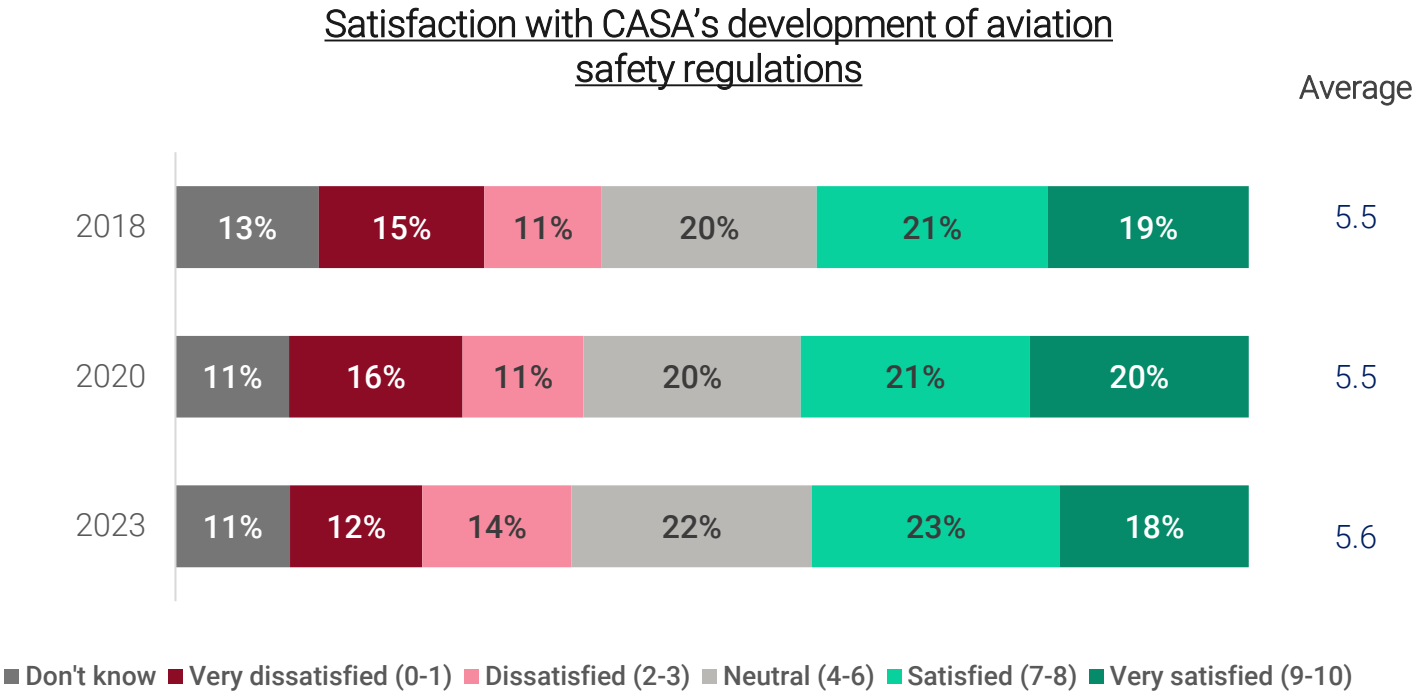
**DEVELOPMENT AND REFORM OF AVIATION  
SAFETY REGULATIONS**  
ONLINE SURVEY FINDINGS

# STAKEHOLDER SATISFACTION WITH CASA'S DEVELOPMENT OF SAFETY REGULATIONS REMAINS STABLE

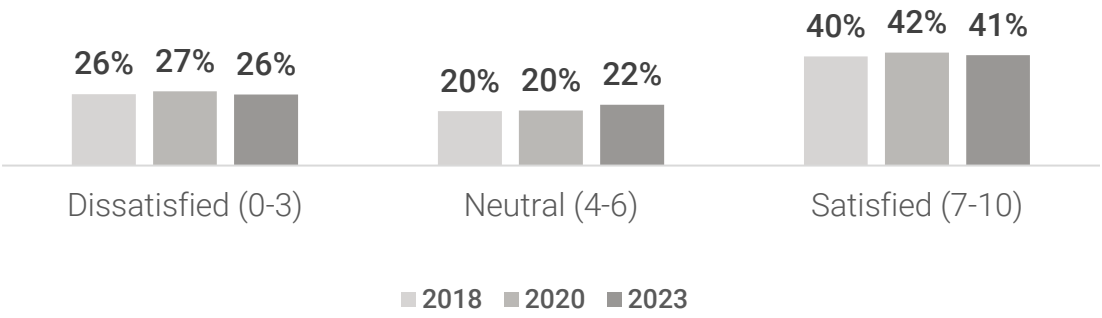
Two in five stakeholders (41%) are satisfied with CASA's development of aviation safety regulations, and 18% are very satisfied.

However, one in four say they are dissatisfied with this aspect (26%).

The results have remained consistent with previous years.



## NET satisfaction with CASA's development of aviation safety regulations



Base: All respondents; 2018 (n=1,168), 2020 (n=755), 2023 (n=683)  
Q7. 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?



# 04

**SERVICE DELIVERY & SAFETY REPORTING**  
**ONLINE SURVEY FINDINGS**

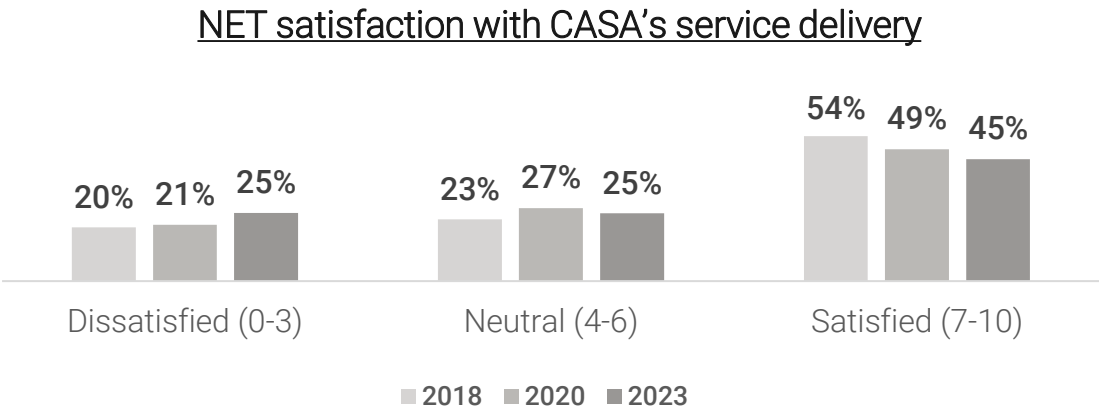
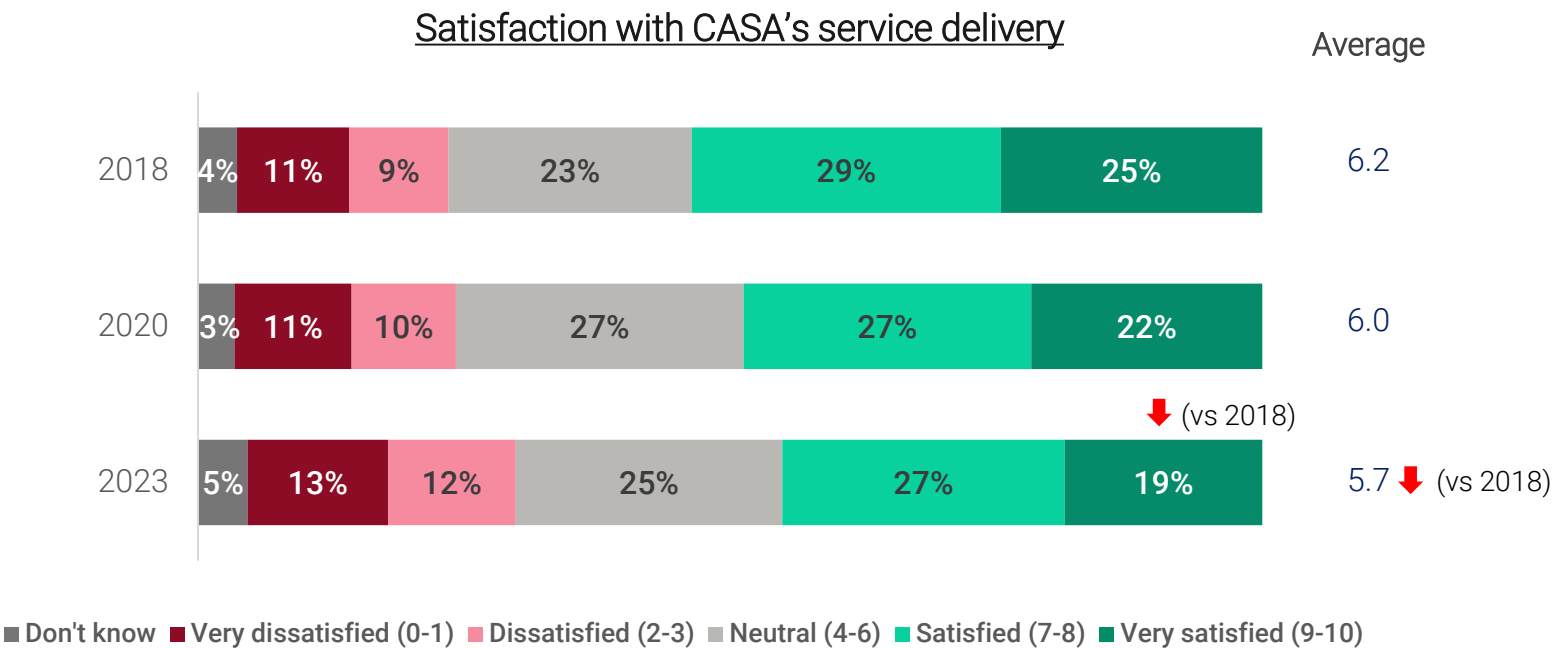


# SATISFACTION WITH CASA'S SERVICE DELIVERY IS DECLINING

Just under half are satisfied with CASA's service delivery, and 19% are very satisfied. This proportion has significantly declined since 2018.

A quarter (25%) are dissatisfied with this aspect, and this has marginally increased since 2018 (although not significantly).

This needs to be a focus area for CASA in order to increase satisfaction amongst key stakeholders.

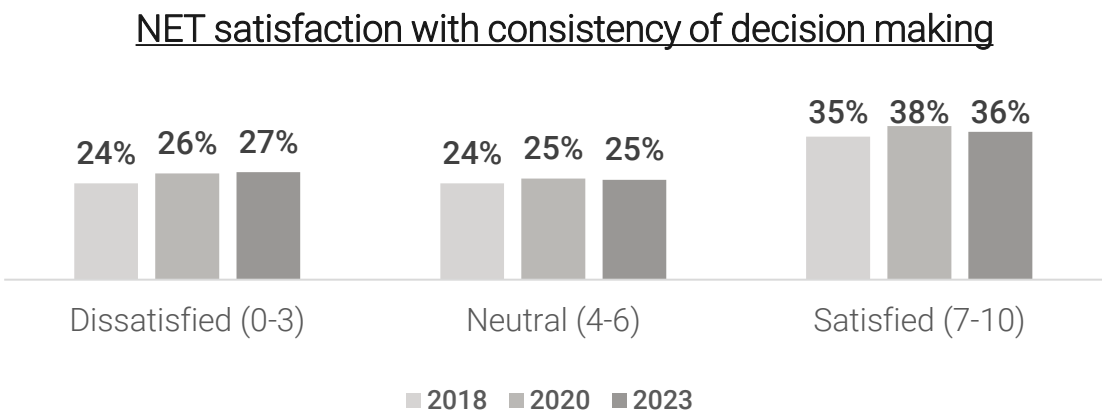
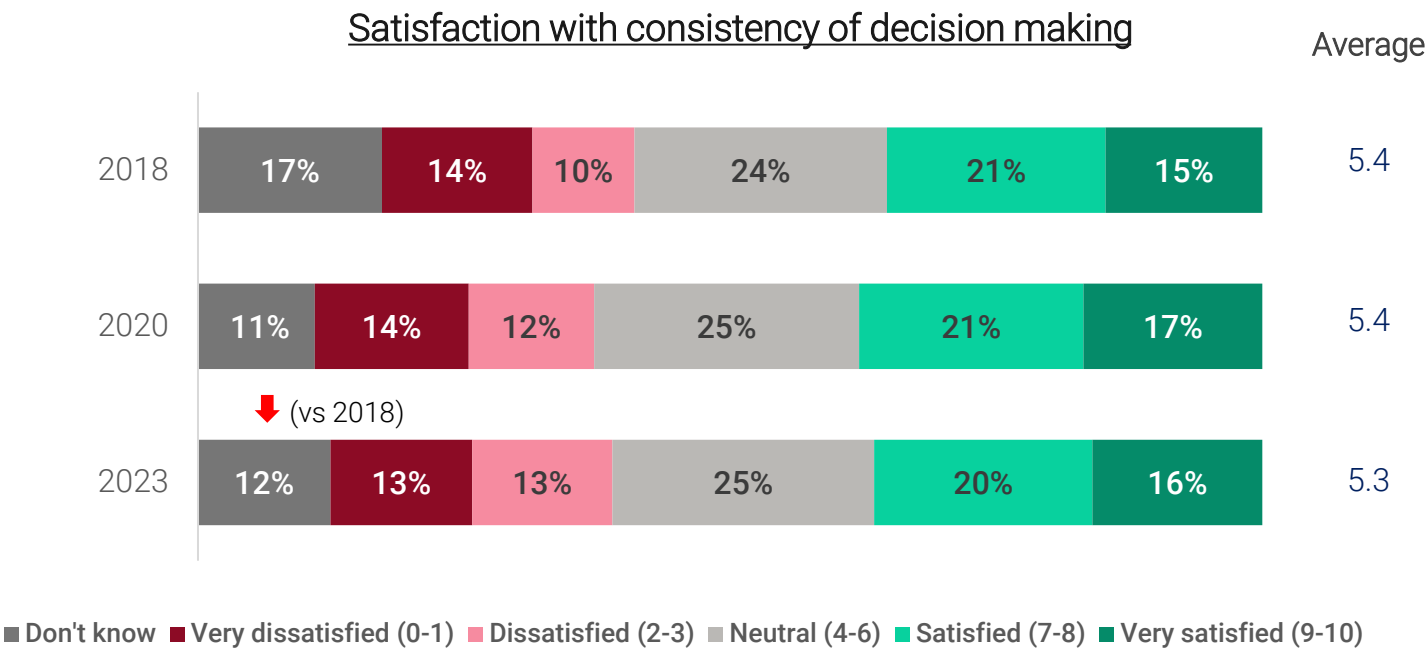


Base: All respondents; 2018 (n=1,168), 2020 (n=755), 2023 (n=683)  
Q8. On a scale of 0 to 10, where 0 is 'very dissatisfied' and 10 is 'very satisfied', how satisfied are you with CASA's service delivery?  
Significant differences between years at the 95% confidence interval level indicated by ↓

# SATISFACTION WITH THE CONSISTENCY OF DECISION MAKING REMAINS MIXED

Opinion on the consistency of CASA’s decision making is divided. Over a third (36%) are satisfied, but around a quarter are either dissatisfied (27%) or feel neutral (25%) about this aspect.

Stakeholders are more likely to have an opinion on this topic, with fewer responding ‘don’t know’ since 2018.



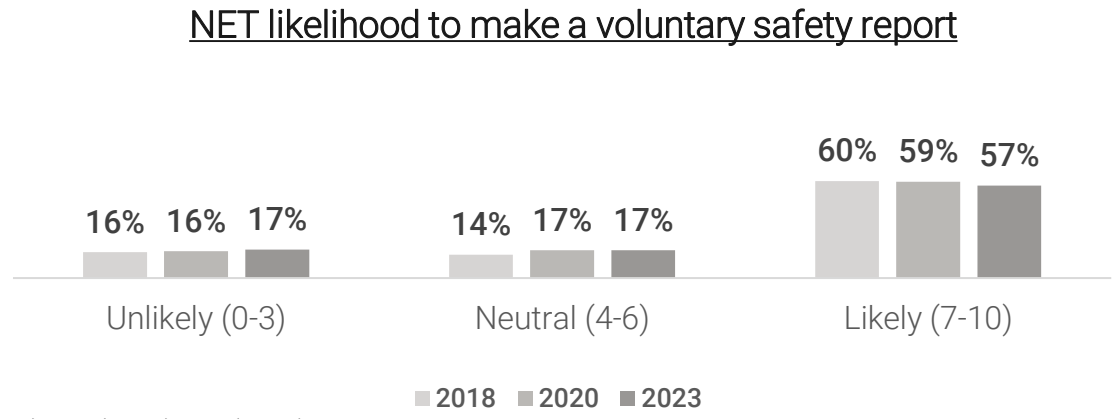
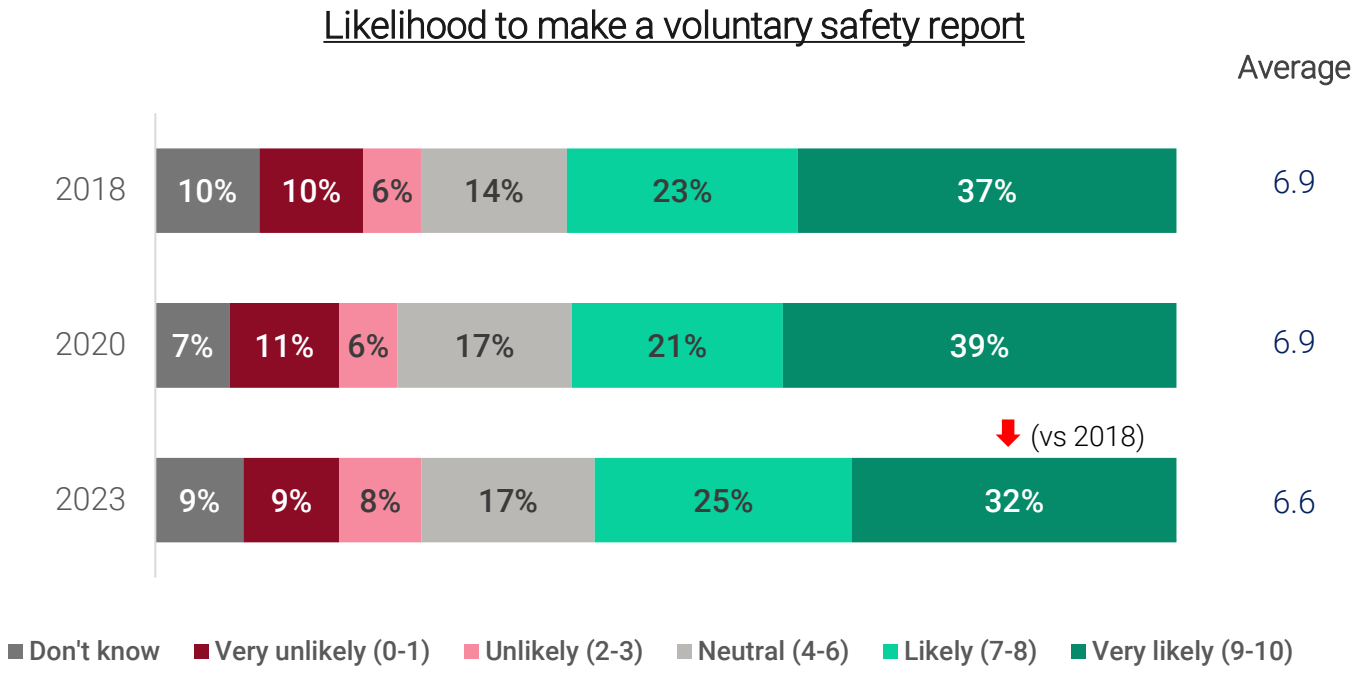
Base: All respondents; 2018 (n=1,168), 2020 (n=755), 2023 (n=683)  
Q9. On a scale of 0 to 10, where 0 is 'very dissatisfied' and 10 is 'very satisfied', how satisfied are you with the consistency of CASA’s decision making?  
Significant differences between years at the 95% confidence interval level indicated by

# MOST STAKEHOLDERS LIKELY TO MAKE A VOLUNTARY SAFETY REPORT, ALTHOUGH FEWER ARE NOW ‘VERY LIKELY’ TO DO SO

The majority (57%) of stakeholders reported that they were likely (rated 7-10) to make a voluntary safety report in situations of material non-compliance with safety regulations, and a third (32%) are very likely to do so (9-10).

While the overall results are consistent with previous years, there has been a decline in the proportion who say they would be ‘very likely’ to make such a report.

The decline across the surveys is spread across the sub-groups, with no one group being significantly less likely to make a voluntary safety report.



Base: All respondents; 2018 (n=1,168), 2020 (n=755), 2023 (n=683)  
Q10. 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 in situations of material non-compliance with safety regulations?  
Significant differences between years at the 95% confidence interval level indicated by ⬆️⬇️

# 05

**FUTURE FOCUS**  
**ONLINE SURVEY FINDINGS**

# THE KEY FUTURE FOCUS FOR CASA NEEDS TO BE SIMPLIFYING RULES AND PROCESSES

The length of the bar represents the proportion who nominated that area as one for CASA to focus on.  
The first darker blue section is the proportion who said that area was the most important.  
The next lighter blue section is the proportion who nominated that area as the second most important.

Stakeholders were asked to select from a predefined list which areas CASA should focus on for the next 12-24 months, and then of those, which one should be the most important, and the second most important.

Clearly the area most stakeholders want CASA to focus on is the simplification of rules and processes, with seven in ten (69%) nominating this aspect, and over a third (36%) believe this is the most important area for CASA’s focus in the next 12-24 months.

The other key areas for CASA’s future focus include improved engagement (40%), more training and education (37%), improved communication and on time service delivery (each 36%).

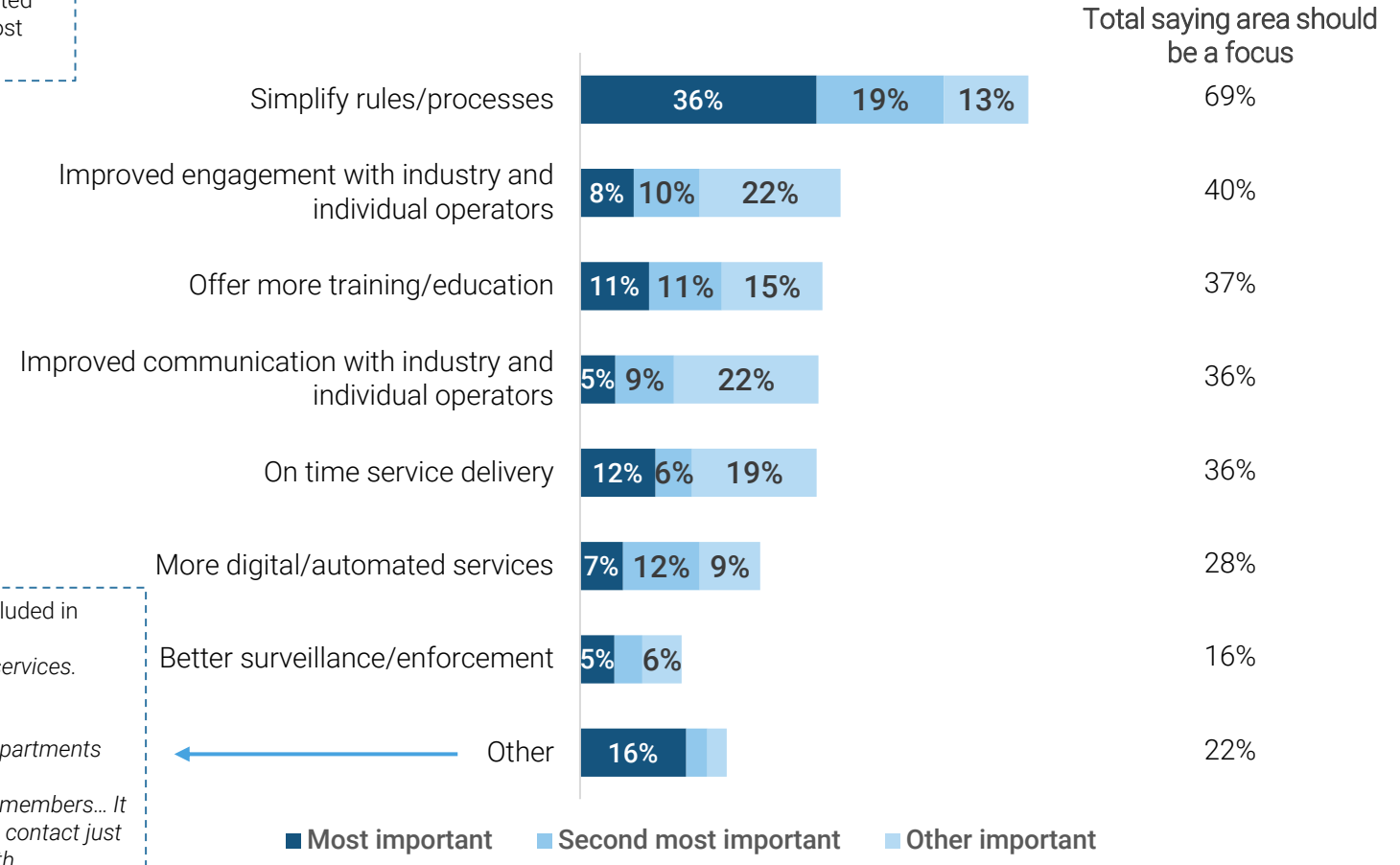
Stakeholders were less likely to nominate improved surveillance and enforcement as an area for CASA to focus on.

Stakeholders were also able to nominate an area other than those provided, for CASA to focus on. Sixteen percent selected this ‘other’ option and some examples of the responses are shown in the text box.

Demographic differences for these questions are outlined on pages 38 and in the tables on page 41.

- Examples of comments included in ‘other’:
- Fix the portal for online services.
  - Reduce the red tape
  - Be helpful
  - Consistency between departments and regions
  - Communication with its members... It would be great to have a contact just to discuss & check in with

Areas of focus for CASA in next 12-24 months



Base: All respondents; 2023 (n=683)  
Q11a. Which of the following would you like to see CASA focus on over the next 12-24 months?  
Q11b. And which one is the most important for CASA to focus on the most over the next 12-24 months?  
Q11c. And what would be the second most important for CASA to focus on over the next 12-24 months?



# 06

**QUALITATIVE INSIGHTS**  
**IN-DEPTH INTERVIEWS**





# OVERALL SATISFACTION WITH CASA

## Overall satisfaction with CASA relationship

- + Stakeholders were broadly very satisfied with their relationship with CASA, and this has been largely credited to the following:
  - o New appointments of staff in senior positions at CASA
  - o Shift in culture under the new Chief Executive to improve the relationship and change dynamics with organisations
  - o Ability to communicate with CASA at all levels, whether that be the CASA board, Chief Executive or lower levels
  - o Increased level of engagement and collaboration with both stakeholders and members
  - o Stronger professional relationships between stakeholders and CASA
- + An aspect driving dissatisfaction was the centralisation of contact points and the subsequent loss of a regional relationship with CASA. The lack of a local regional contact was seen to impact the speed that issues can be resolved, as well as losing the local knowledge and assistance (especially for initial guidance and advice and in some cases, 'hand holding'). It can also be confusing navigating who to contact.

*I've got very good relationships at CASA ....I guess having to have some robust discussions as well, but it does give me the opportunity to be more frank, and for them to be a bit more frank with me because we come from an area of trust.*

*There is a new energy and quite a shift in culture that I have recognised over the past 12 months with CASA the new or the relatively new Chief Executive, has done a remarkable job to improve the relationship.*

”

*The lack of connectivity has been frustrating. CASA changed the contact points, now queries come into a central place and they are farmed out, so we have lost connectivity with the regional office – what was a quick 5-minute phone call turned into a 6-month process.*



## OVERALL SATISFACTION WITH CASA c'tnd

### What stakeholders are hearing from members and their staff

- + A segment of organisations and associations felt that although their staff and members are still experiencing issues and problems with CASA, there is a new sense of confidence that those issues will be brought to the surface and be addressed. This confidence is largely accredited to the improvement of interaction with senior management at CASA.
- + The frustrations felt by some members and their staff were due to the lack of contact and connectivity from CASA. Members were also feeling frustrated because they are trying to run businesses and get things done – however they were finding it difficult to get decisions from CASA.
- + As previously mentioned, this lack of connectivity was further seen in regional areas with CASA moving to a centralised model in order to improve efficiencies. Although CASA has recently made an announcement around moving back to the original model, regional areas are weary it will take a while before they can rebuild that connection with CASA again.

### The ideal relationship between organisations/associations and CASA

Many stakeholders felt the current relationship they have with CASA is ideal or close to the ideal, particularly as a result of the higher levels of interaction and engagement over the past few years, which has strengthened the relationship. Stakeholders now feel they have more access and ability to pick up the phone when necessary to have conversations with CASA.

Mutual respect was largely considered a factor to achieving an ideal relationship, which included the following aspects:

- + A mutually beneficial relationship where stakeholders receive prompt responses to queries to enable them to deal with members to take pressure off CASA directly dealing with them
- + A collaborative environment with mutual trust and respect, where expertise can be shared for a common good
- + Autonomy to make decisions on their own without excessive intervention from CASA
- + A strong robust relationship where stakeholders have the ability to partner with CASA to have input into regulatory issues

*I don't think it'd be too different from what we've got today. I think we've got an open and collaborative relationship presently where we can respectfully get to issues quite quickly and talk through them; CASA are very much prepared to listen to what industry have got to say.*

*They put out a notice that they decentralised most of their services and then they realised it wasn't working and moved and now they are going back to local offices for the regulatory service stuff ....well done CASA for listening and making changes.*



## POSITIVE ASPECTS OF CASA'S PERFORMANCE:

### Positive interaction with CASA over past 12 months

- + Stakeholders noted the significant improvement with their interactions with CASA over the past few years, and they have been particularly impressed with CASA's willingness to seek out engagement with stakeholders and take on suggestions and provide explanations as to why decisions are made.
  - o Collaboration on the RPAS and AAM regulatory road map was positively noted as an example of CASA listening to industry on what industry thought was important coming up in the areas of advanced aviation technologies, flying taxis and the drone sector and the collaborative effort to plan how to develop incoming regulation.
- + Stakeholders also considered the accessibility to senior management being vastly superior to previous years. Having the ability to pick up the phone and speak to senior management at CASA when needed, rather than having to go through previously required formal submissions, has been welcomed.
- + Although stakeholders bear frustration with delays from CASA, they do give credit to CASA for trying their best to get things done and are open and honest about the fact they are struggling to meet expectations.
- + Most stakeholders highlighted that they have a good working relationship with CASA, where there is noticeable improvement in communication between industry and the regulator. A segment of stakeholders felt having strong personal relationships with CASA members allowed them to have a productive relationship with them.

*Two years ago, if I wanted to get anything done with CASA, I had to write a letter... and now I'm confident that I can provide a less formal submission if the worst came to the worst, I could pick up the phone, so accessibility to senior management has improved enormously.*

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*We have many and varied interactions and that's a good thing because it's a large and complex organisation.*

### Aspects of CASA's performance which is working well

- + Quality of consultation materials being produced for public consultations on regulatory change has improved, as has the transparency of the consultation process where stakeholders are able to see what the industry is saying in response to consultation.
- + Stakeholders noted the regularity of meetings with a broad range of people from CASA is significantly beneficial, providing an opportunity to discuss and report on challenges members or staff are experiencing.



# NEGATIVE ASPECTS OF CASA'S PERFORMANCE

## Negative interaction with CASA over past 12 months

- + While stakeholders have seen an improvement with accessibility to CASA at the senior level over recent years, this is not necessarily the case for their members and staff. There is significant frustration for their staff and members who are unable to get applications approved in a timely manner, and they often escalate delays internally to their management for them to engage with CASA to see if the process can be expediated..
  - o Members and staff are also experiencing a significant lack of responsiveness from CASA, often not being able to get to access the person they need to contact regarding their query or not hearing back from CASA altogether.
- + Some felt their interactions with CASA's middle management previously had been quite negative – they felt middle management often get too involved when it's not necessary, making it harder for organisations and associations to get things done.

## Aspects of CASA's performance which are not working well

- + Significant backlogs in approvals and applications specifically for non-standard operations
  - o Backlogs have resulted in not being able to get students up in the air at the same frequency as before, due to the time of approvals .
- + Behaviour of CASA inspectors considered to be at times 'aggressive' and 'demanding', where inspectors fail to make appointments ahead of time, and instead just show up at the workshop while tradesmen are busy.
  - o It was also noted there are inconsistencies with regulatory oversight when it came to CASA inspectors, where industry are being told different things from different inspectors when it came to the same approval.
- + Some stakeholders felt CASA's changes to structure and management over the past few years has affected CASA's performance in delivering regulatory services leading to the current delays.

*It's middle management, they like to make a meal out of something....we don't understand why they need to do that. They get too down in the weeds and have opinions and we think they're not progressive opinions.*

*We're seeing (across government, not just CASA) a normalisation of 'you'll get it when we're ready' and it's just taking longer and longer to get things out of CASA.*



# CASA PERFORMANCE DURING COVID & POST-COVID RECOVERY

## CASA's performance during COVID...

- + Stakeholders were understanding of CASA's position during COVID and felt they did well to navigate and manage a time of unknown, and they particularly felt CASA performed well on the following:
  - o Responding in a timely manner to alleviate restrictions where necessary
  - o CASA's ability to help organisations adapt and move training to online modes of delivery
  - o CASA's ability provide relief for industry on timelines and relief for some charges and fees
  - o Extensions of crew medicals
  - o Rapid approvals of FRMS significant changes for Flight Crew duty periods e.g., single tour of duty for Delhi repat flights

## CASA's performance post-COVID...

- + A segment of stakeholders were impressed with CASA's post-covid recovery efforts, they felt CASA did well to reorganise, reassemble and resume activity relatively quickly.
- + Although not perceived to be a criticism, stakeholders were aware post-COVID CASA had a lot of work to do for both CASA and the industry to return to normality, and the flow on effect of trying to catch-up has impacted CASA's BAU activities, as resources were heavily focused on the catch-up.

*During COVID, I honestly don't know what else they could have done. It wasn't an optimal situation at all, but I just don't know what else they could have done.*

*I think unfortunately they haven't come out of COVID well; I talk about the time frames from government, I think that the rest of the world moved on and just getting on with as we were pre-COVID but CASA is probably not back in that space yet.*

*I'll give you an example. They gave a lot of pilot's exemptions on their medical requirements and that was good because people couldn't get to the doctors because they're in lockdown. They ended the exemption on the same day for everyone. So that meant you had hundreds, and if not thousands of pilots who were trying to get their medical done and processed at the same time. And so, there was a bit of mayhem there. But look, I don't know if I want to call that a criticism because, COVID was one of those things that we never experienced before.*

## CASA'S PERFORMANCE ON...



### The implementation of changes to support general aviation

- + Stakeholders were mixed in their opinion on CASA's performance in this area. Some felt CASA has done well to identify certain areas and problems for them to work on - while others were not fully satisfied yet that everything that should be done, has been done yet. They were however satisfied that there has been substantial effort made under new senior management, given where they picked up from the previous leadership.
- + A small segment of stakeholders felt there can often be too much attention on general aviation, as they are the 'noisiest' in the sector.
- + One of the key frustrations in this area was that although CASA has engaged with industry and listened to the changes needed, the length of the process of getting the changes implemented is taking too long.

*We're working through things. But then we'll have a meeting in another week or so, and then it doesn't happen, and then nothing happens for months. That's probably the area we feel the most frustrated.*



### The development of plain English guides

- + Overall most stakeholders were positive about the development of plain English guides and appreciated they have become more easily digestible. They were however aware there is still more work to be done in this area.
- + Plain English guides have been welcomed within the industry given how difficult and complex the legal content is within the regulations, so having the guides to help read the regulations has been beneficial.
- + The development of plain English guides have also been appreciated in sectors where industry may not have a solid aviation background compared to sectors with a conventional aviation background.
- + Stakeholders acknowledged the difficulties around developing the guides due to the way legislation is written and are understanding and sympathetic towards the process.

*So in the early days that was quite a difficult beast to try and digest, whereas now it's more straightforward and understandable.*

*That's (plain English guides) probably the greatest thing that CASA has done in the last 4 or 5 years.*



# CASA'S PERFORMANCE ON...



## CASA's safety education activities and initiatives

- + Stakeholders spoke highly of CASA in relation to their safety education activities and initiatives, and they were particularly positive about the following aspects:
  - o Safety seminars, webinars, podcasts and videos produced
  - o Guidance material being made available encouraging safety
  - o CASA's safety advisors being highly experienced with the right personalities to engage with industry
  - o Increased engagement with industry on a face-to-face basis
  - o Flight Safety Australia magazine which provide publications that are very engaging and interesting
- + Although, there was a small segment of stakeholder who felt they had not seen anything that has come out recently in their area around safety education and initiatives

*I think everywhere I turn I see something from CASA on safety promotion.*



## The availability of online services

- + A segment of stakeholders felt the CASA's online services have improved compared to the past especially for online submissions and processing procedures.
- + The CASA website was considered hard to navigate by a segment of stakeholders, where they feel there is more work to be done to enable ease of use e.g. for smaller operators of aircraft who are trying to locate what provisions might apply for them in particular situations.
- + Although online services provide certain efficiencies a segment of stakeholders feel due to the way CASA functions there is a greater need to speak to people rather than using a portal.

*Online is welcome, but there's also the challenge that you must do both, and I'd say that online and digital should not be at the expense of face -to-face or in-person meetings and inspections at aerodromes in this modern age, I think we need both.*

# CASA'S RESOURCE BASE



## CASA is over-investing In...

- + Some stakeholders were unable to identify any areas they felt CASA was over- investing. Others however mentioned an over-investment in:
  - o General aviation
  - o Flying for fun space

*There seems to be an enormous amount of attention on general aviation and although I can understand it, they are going to be the challenging part of the sector, but they're also not necessarily part of the sector that funds CASA or funds the aviation sector.*

*We are in the flying for fun space, which means from a risk perspective, the risk that can be accepted is a lot greater than of course, if you know we were Qantas. But a lot of the time they invest way too much time in applying standards to us that are just far and above that what's required, and that means everything is so slow. Those are the complaints that I hear that we don't have enough people and it's like, no, no, you've got enough people. You're just overcooking it.*



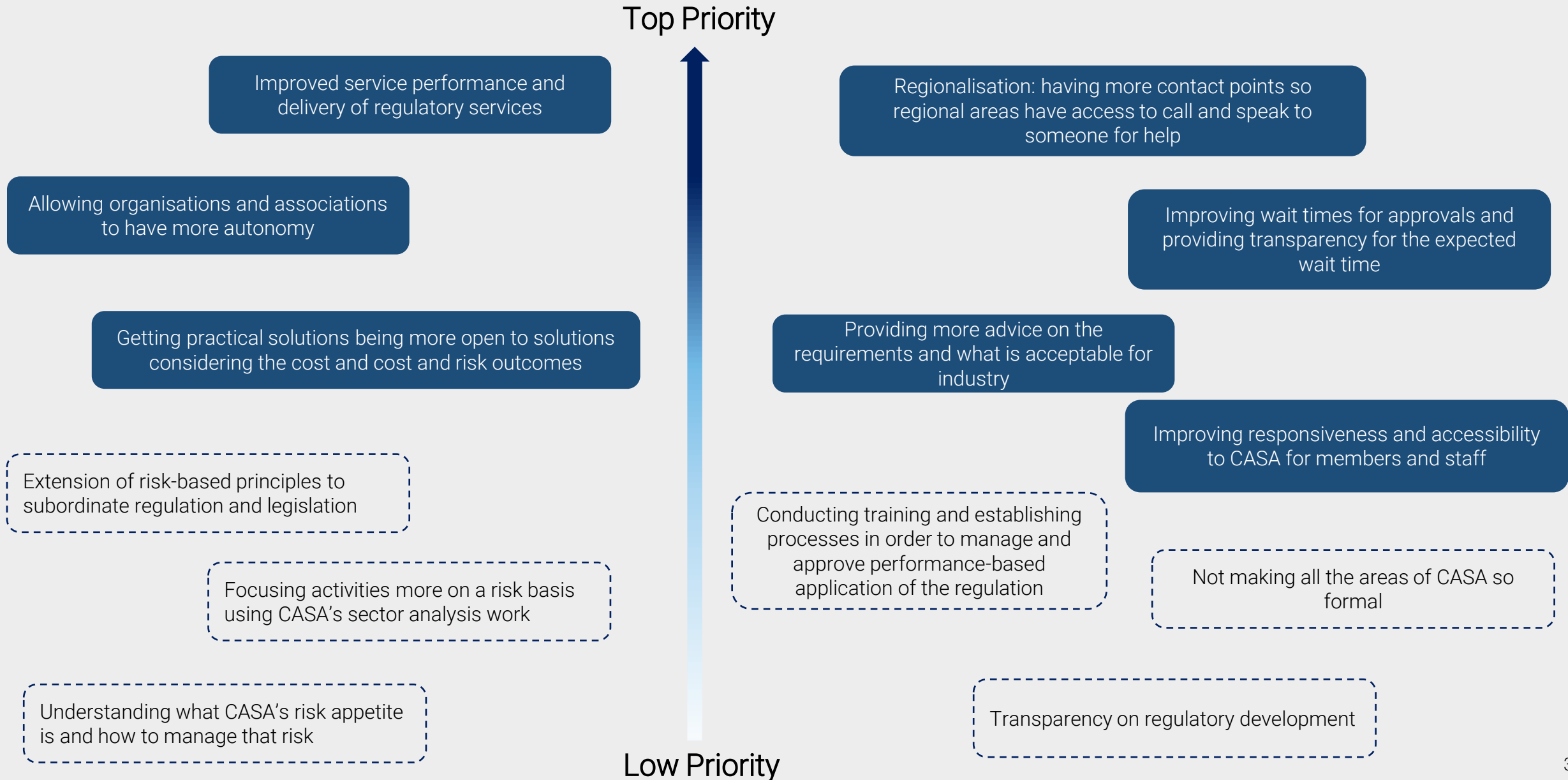
## CASA is under-investing in...

- + CASA should focus more resources on the parts of industry which has the highest risk e.g. In FRMS the greatest risk exists in Part 135 operators, however, complex Part 121 operators are the focus
- + Approval of operations subject to exemption (e.g., fuel policy) for complex operators generating significant resource activity for both industry and CASA, to the detriment of areas where greater risk exists
- + More timely responses to the commercial sector of aviation is important
- + New technology space e.g., advanced mobility and large drones
- + Innovation/ artificial Intelligence
- + Frontline tailored services for general aviation
- + Sharing expertise
- + Regulatory oversight department

*I used to go out and you would see CASA inspectors with the fluoro vests out and, in the airports, just doing random checks. You don't see that anymore because they don't have enough staff.*



## AREAS OF IMPROVEMENT





## AREAS OF IMPROVEMENT

Stakeholders consider the following to be key challenges they will need to work with CASA on over the next 12 months...

- + Due to the shortages of engineers, there will be a need to reduce the impact of this on industry and think outside the box to streamline pathways
- + Improving the training environment to eliminate any conflict for those who are undertaking both vocational training and training that is recognised by CASA
- + Improving the time taken to implement changes that require legislative change
- + Self-regulation with members
- + Finding practical solutions against regulatory philosophy and getting CASA to be more open about solutions that aren't necessarily safety, but consider cost and risk-based outcomes as well
- + Allocation and prioritisation of resources
- + Engineering licensing and removing the barrier for them to work on a broader array of aircraft

CASA can consider the following to ensure the safe aviation activities of members...

- + Improving the culture at CASA specifically with inspectors on the ground or in certain regions, by enabling input to allow industry to work together with inspectors
- + Better information sharing across agencies
- + Engaging and understanding how CASA is operating across the industry, then assessing where CASA's interventions are most likely to yield outcomes
- + Better surveillance would mean the industry would have better safety outcomes

”

*I think there's a continued work with them on resource priority. As I said, they're doing a good job on that, but it's not without a continued dialogue.*

*Blind compliance doesn't equal safety, and I think that's probably the biggest thing.*



# 07

**DEMOGRAPHICS**

# DEMOGRAPHIC ANALYSIS

This section outlines the significant differences by the demographic sub-groups, that is, where a sub-group is significantly more or less likely to hold that view.

As indicated in the tables on the following pages...

Satisfaction with CASA tends to be **higher** among:

- + Newer entrants to the industry (those who have been operating in the aviation sector for less than 3 years)
- + Those in the RPAS sector
- + Stakeholders who mostly deal with CASA's Aviation Safety Advisors/ industry relations area

Satisfaction with CASA tends to be **lower** among:

- + Those who have been in the sector longer (40+ years)
- + Air transport pilots, and to a lesser extent, air traffic controllers
- + Stakeholders who mostly deal with CASA's Client Services Centre

While all sub-groups want CASA to focus on simplifying the rules and processes over the next 12-24 months, beyond this there are some key demographic differences:

- + New entrants to the industry are more likely than others to want CASA to focus on being more digital and automated and offering more education and training
- + Those who have been in the industry for a long time (40+ years) are more likely than others to want simplified rules and processes, improved communications and engagement
- + The RPAS sector are more likely than others to want a focus on education and training
- + Air transport pilots are more likely than others to see on time service delivery as an important focus
- + Air traffic controllers are more likely than others to want CASA to focus on better surveillance and enforcement

# DEMOGRAPHIC ANALYSIS

Average	Age group							Time operating/involved in aviation sector						Current primary role in aviation sector			Area of CASA had the 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	Air traffic controller	Client Services Centre	Aviation Safety Advisors/ industry relations
Column n	683	33	64	111	174	172	96	98	81	99	107	117	143	98	62	17	345	43
Q1a – Overall satisfaction with relationship with CASA	6.1	5.7	5.7	5.9	6.2	6.5	6.5	7.8	6.5	5.7	5.8	5.6	5.7	7.6	4.3	3.8	5.7	7.9
Q2 – Satisfaction with elements of CASA’s performance:																		
Operates with safety as its primary focus	6.9	7.3	6.4	7.0	7.0	7.0	7.2	9.1	7.3	6.2	6.4	6.3	6.3	8.5	5.2	3.8	6.6	8.4
Maintains an open and transparent relationship with you	6.2	5.7	6.1	6.2	6.2	6.5	6.7	8.2	6.3	6.0	5.9	5.7	5.6	7.8	4.4	4.5	5.8	7.6
Actively helps stakeholders comply with regulations	6.1	6.2	5.8	6.0	6.1	6.4	6.5	8.1	6.4	5.7	6.0	5.6	5.4	7.4	4.8	4.0	5.9	7.6
Works collaboratively with industry	5.7	5.7	5.8	5.5	5.6	6.0	6.0	8.1	5.7	5.3	5.5	5.0	5.1	7.4	4.3	3.9	5.4	7.5
Balances consistency and flexibility	5.3	5.0	5.3	5.2	5.5	5.5	5.7	7.5	5.5	4.9	5.2	5.0	4.6	6.9	4.0	3.3	4.9	6.9
Q3 – Rating of CASA performance																		
Rating CASA’s response to COVID-19	6.4	6.7	5.8	6.0	6.6	6.6	6.6	8.0	6.4	6.2	6.0	6.3	6.0	7.4	5.2	5.8	6.3	8.0
Rating the implementation of changes to support general aviation	5.4	6.3	5.1	5.4	5.6	5.3	5.7	8.0	6.4	5.3	4.8	4.4	4.7	7.8	4.3	3.9	5.1	7.2
Rating the development of plain English guides	7.1	8.2	7.2	7.3	6.9	7.2	7.0	8.8	7.6	7.2	7.0	6.4	6.2	8.3	6.5	7.3	7.1	8.2
Rating CASA’s safety education activities and initiatives	6.9	7.1	6.8	6.7	7.0	7.1	7.0	8.5	7.0	6.9	6.8	6.4	6.2	7.8	6.4	4.9	6.9	8.5
Rating the availability of online services	6.7	6.3	6.5	6.7	6.8	6.8	6.7	8.3	6.9	6.4	6.6	6.3	6.0	8.1	5.4	5.9	6.6	8.0
Q4a Rating of CASA’s regulatory philosophy?	5.2	4.7	4.9	5.4	5.0	5.2	5.4	5.6	5.2	4.8	5.2	5.3	5.0	5.3	4.6	3.9	4.9	6.4
Q4b Rating of extent stakeholder’s think CASA follows their regulatory philosophy	6.5	7.1	6.2	6.6	6.5	6.5	6.7	8.0	7.1	6.5	6.0	5.9	6.0	8.0	5.0	4.1	6.2	7.8

Indicates a significant difference between column means at the 95% confidence interval level higher lower



# DEMOGRAPHIC ANALYSIS

		Age group						Time operating/involved in aviation sector						Current primary role in aviation sector			Area of CASA had the 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	Air traffic controller	Client Services Centre	Aviation Safety Advisors/industry relations
Column n	683	33	64	111	174	172	96	98	81	99	107	117	143	98	62	17	345	43
Q5 – Agreement statements																		
CASA explains the regulations and how they affect industry stakeholders in a clear and succinct manner	5.5	5.2	5.8	5.6	5.6	5.6	5.8	7.7	6.1	5.1	5.1	5.0	4.7	7.3	4.2	4.3	5.3	7.1
I can easily interpret how regulations affect the way I operate	5.7	6.0	5.8	5.9	5.7	5.6	6.1	7.8	6.3	5.3	5.2	5.2	5.0	7.4	4.1	6.2	5.5	7.4
I clearly understand why CASA makes the decisions it does	5.1	4.9	4.9	5.1	5.3	5.1	5.1	7.5	5.9	4.4	4.7	4.4	4.1	7.3	3.8	2.8	4.6	7.2
Q6a – Ease of complying with all aviation safety regulations relevant to your role/activities	6.3	7.1	6.2	6.6	6.2	6.2	6.4	7.7	7.0	6.0	5.9	6.0	5.6	7.2	5.3	6.6	6.2	7.9
Q6b – Confidence in ability to comply with all aviation safety regulations relevant to your role	7.2	7.8	7.1	7.7	7.2	7.0	7.6	8.4	7.9	6.9	7.0	6.7	6.8	8.2	6.3	6.6	7.0	8.2
Q7 – Satisfaction with the ways CASA develops aviation safety regulations	5.6	6.1	5.3	5.7	5.7	5.6	5.7	8.0	6.5	5.2	5.1	5.0	4.4	7.5	3.8	3.1	5.3	7.9
Q8 – Satisfaction with CASA's service delivery	5.7	5.4	5.4	5.5	5.7	5.9	6.1	7.7	6.2	5.5	5.3	4.8	4.9	7.6	3.6	3.3	5.3	7.9
Q9 – Satisfaction with consistency of CASA's decision making	5.3	5.1	5.3	5.2	5.4	5.6	5.5	7.8	5.7	5.1	4.9	4.8	4.5	7.3	3.6	2.8	5.0	7.6
Q10 – Likelihood of making a voluntary safety report	6.6	6.5	6.5	6.7	6.7	6.7	7.1	7.6	6.6	6.7	6.1	6.5	6.4	6.8	5.1	5.8	6.4	7.2

# DEMOGRAPHIC ANALYSIS

Column n	Age group							Time operating/involved in aviation sector						Current primary role in aviation sector			Area of CASA had the most contact with over past 6 months	
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Column n	683	33	64	111	174	172	96	98	81	99	107	117	143	98	62	17	345	43
Q11a -- Areas of focus for CASA over the next 12-24 months																		
On time service delivery	36%	48%	45%	41%	35%	31%	32%	28%	31%	39%	40%	34%	43%	14%	54%	41%	42%	26%
More digital/automated services	28%	70%	33%	30%	28%	24%	19%	42%	39%	31%	25%	16%	19%	35%	25%	18%	29%	37%
Simplify rules/processes	69%	85%	58%	67%	67%	70%	72%	67%	66%	62%	76%	60%	78%	64%	63%	41%	71%	61%
Better surveillance/enforcement	16%	6%	27%	18%	16%	12%	15%	14%	19%	13%	15%	17%	15%	18%	14%	35%	12%	22%
Offer more training/education	37%	58%	28%	33%	43%	37%	33%	53%	43%	37%	30%	33%	31%	51%	14%	6%	30%	46%
Improved communication with industry and individual operators	36%	55%	41%	29%	39%	33%	39%	21%	41%	33%	32%	40%	47%	25%	33%	24%	32%	41%
Improved engagement with industry and individual operators	40%	30%	41%	40%	43%	39%	38%	27%	40%	28%	42%	45%	51%	30%	41%	24%	36%	39%
Or something else, please specify	22%	24%	20%	21%	23%	22%	23%	9%	18%	22%	23%	33%	25%	12%	37%	35%	22%	17%
Q11b -- Most important areas of focus for CASA over the next 12-24 months																		
On time service delivery	12%	15%	20%	14%	6%	12%	10%	9%	6%	18%	13%	10%	13%	2%	16%	24%	15%	2%
More digital/automated services	7%	18%	6%	8%	6%	5%	5%	9%	17%	8%	4%	4%	2%	12%	3%	6%	7%	11%
Simplify rules/processes	36%	30%	23%	36%	36%	39%	40%	38%	32%	31%	41%	31%	42%	36%	29%	12%	38%	43%
Better surveillance/enforcement	5%	3%	9%	7%	5%	3%	4%	5%	7%	5%	5%	7%	4%	7%	6%	24%	5%	4%
Offer more training/education	11%	12%	8%	7%	14%	13%	6%	22%	11%	12%	7%	9%	5%	24%	0%	0%	8%	15%
Improved communication with industry and individual operators	5%	9%	9%	1%	6%	3%	9%	5%	7%	7%	1%	5%	8%	5%	8%	0%	5%	4%

Indicates a significant difference between column means at the 95% confidence interval level

higher

lower



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