## WHERE TO





Civil Aviation Safety Authority
June 2025



## **Executive summary**

While the quantitative data suggests stakeholder perceptions are stable, qualitative conversations with senior industry stakeholders painted a more positive picture of improving industry relationships.

In 2025, around half (51%) of stakeholders are satisfied with their relationship with CASA. Stakeholders gave an average rating of 6.1 out of 10 in 2025 – on par with the 2023 results (6.1).

- The proportion who were 'very satisfied' with their relationship with CASA has increased significantly since 2023 (24%, up from 16% in 2023).
- The provision of relevant and helpful information is a key driver to stakeholder satisfaction.
- Qualitative interviews suggest CASA has made positive progress. CASA are increasingly seen to be meeting expectations in addressing industry needs and providing online services, as well as working on fostering and supporting positive industry relationships.

#### Positive progress can be attributed to improvements in communication, collaboration and performance.

- 47% of stakeholders are satisfied with the way CASA maintains an open and transparent relationship with them and feel that CASA are more actively engaged with industry needs and listening to what they are saying about their needs, challenges and ideal ways of working.
- 36% of stakeholders are satisfied with the way CASA works collaboratively with industry, and believe CASA have a more active presence across industry and a greater commitment to working with industry across sectors.
- Stakeholders report increased speed and efficiency from CASA, supported by the development of plain English guides and online resources. Qualitative interviews indicated that the approvals process and processing times is seen to have improved in the last 12-18 months, and online applications and processes have helped to support a faster and more efficient system.

#### Senior CASA staff are key contributors to positive shifts in CASA's performance.

• Senior staff are seen to have a greater personal commitment to making changes and focus on working collaboratively and maintaining personal relationships with stakeholders.





## **Executive summary**

While satisfaction with some aspects of CASA's performance remain stable, satisfaction with service delivery is trending downwards.

- 41% of stakeholders are satisfied with the way CASA develops aviation safety regulations, and 37% are satisfied with the consistency of CASA's decision making. These results are stable with previous waves.
- Satisfaction with CASA's service delivery in trending downwards, down 4 points from 2023 and 12 points since 2018 (now at 42% satisfied).
  - Slow service delivery is reported as the main reason for dissatisfaction with CASA and a driver analysis reveals that service delivery is the 2<sup>nd</sup> most important driver of overall satisfaction. These results suggest that addressing performance in service delivery is vital to improving overall satisfaction.

#### Ratings of CASA's performance of their regulatory philosophy principles vary.

- Four in ten believe CASA communicates meaningfully with stakeholders (41%, a great extent), is committed to maintaining the trust of the aviation community (41%) and takes a risk-based approach to decision making (39%).
- However, at least one in five stakeholders provided neutral ratings to these aspects of CASA's performance.

#### Compliance with aviation safety regulations is perceived to be easy, however confidence in doing so is trending down.

• Half (50%) of stakeholders find it easy to fully comply with all aviation safety regulations, including 23% who find it very easy. This result is on par with 2023 where 52% found it easy or very easy to comply. Two-thirds (67%) are confident in their ability to comply with all aviation safety regulations (down 4 points since 2018).

#### Stakeholders who are in regular contact with CASA generally rate CASA more negatively.

- More than half (54%) of stakeholders have been in contact with CASA within the last 3 months. These stakeholders were
  more likely to be dissatisfied with CASA overall (28%), the way CASA develops aviation safety regulations (23%), their
  service delivery (35%), and consistency in decision making (38%).
  - This is most likely due to a recency effect and the increased likelihood that the issues for which they have been in contact remain unresolved, and are in the process of being attended to. However, this is potentially related to the issues noted above around perceptions of slow service delivery, and potentially suggests a need to keep stakeholders better informed of the progress of their enquiry through the system.





## **Executive summary**

#### Legacy issues are the key areas for future focus.

- There is a lack of consistency between operational teams, resulting in varying levels of service quality.
- The levels of bureaucracy is causing frustration, with stakeholders calling for a more streamlined approach to working with CASA. Many stakeholders believe the simplification of rules and regulations should be a key focus area in the future.
- In addition, the simplification of application processes to allow for better communication of timelines and status of applications should be an area of future focus.
- Some stakeholders believe there is a lack of transparency on CASA's behalf. More transparent processes and communications could drive improvements in stakeholder experience and perceptions.

#### RPAS operators view CASA more positively than other stakeholders, and are generally more satisfied with CASA.

- RPAS Operators were significantly more likely to be satisfied with the way CASA operates with safety as its primary focus (86% vs 50% of other stakeholders), maintains an open and transparent relationship with stakeholders (71% vs 44%), and actively helps stakeholders comply with regulations (65% vs 40%).
- RPAS Operators were significantly more likely to be very satisfied with:
  - The way CASA develops aviation safety regulations (41%, compared to 14% of other stakeholders).
  - CASA's service delivery (51%, compared to 16% of other stakeholders).
  - CASA's consistency in decision making (43%, compared to 14% of other stakeholders).





## Research background

CASA has run a biennial 5-minute stakeholder satisfaction survey since 2015 to obtain feedback on its performance and understand key areas of responsibility in which stakeholders believe require improvement.

## CASA commissioned Whereto Research to run their biennial stakeholder satisfaction survey in 2025.

In 2023, stakeholders gave an average satisfaction rating of 6.1 out of 10 when asked to describe their relationship with CASA. While most were positive about CASA's safety education resources, some stakeholders were discontent with aspects of CASA's service delivery.

 This highlighted a need for further tracking of stakeholder satisfaction to further understand drivers of reduced satisfaction and identify focus areas in CASA's engagement with stakeholders that need improvement.

Since 2015, the survey has been refined to produce a survey instrument that is succinct and easy for stakeholders to complete. In 2025, further refinements were made to understand frequency of engagement with CASA, and perceptions of CASA's regulatory philosophy principles.

Consistent with 2023, qualitative interviews were conducted to gather detailed feedback from stakeholders about their engagement and experience with CASA.





### Research objectives

The 2025 stakeholder survey aims to:

- measure stakeholder satisfaction with CASA and identify the key drivers of that satisfaction,
- assess satisfaction levels with CASA's performance of their regulatory principles, safety regulations, compliance, service delivery, consistency in decision-making and safety focus,
- identify future areas of focus for each of these categories,
- explore and analyse changes in stakeholder ratings of CASA's performance and relationships compared to 2020 and 2023 results, and
- provide deeper insights into stakeholder satisfaction and highlight areas for improvement.



## Methodology and sample

A mixed-method approach was used to measure stakeholder satisfaction in 2025.



#### Online survey

- Similar to 2020 and 2023, using a random stratified sampling approach, n=6,600 stakeholders were invited to complete the 5minute survey
- n=436 stakeholders completed the survey, resulting in a response rate of 6.6%, which is similar to, but slightly lower than the response rate observed in 2020 (11.4%) and 2023 (10.4%). This has resulted in a slightly higher margin of error in 2025.
- Quantitative fieldwork was conducted between 28<sup>th</sup> April and 4<sup>th</sup> June 2025.



#### In-depth interviews

- n=12 in-depth interviews were conducted with stakeholders representing key industry associations and aviation sectors.
- The 45-minute online interviews were conducted via Microsoft Teams in April 2025.
- An initial email was sent by CASA to stakeholders prior to Whereto scheduling the interviews.

In line with previous iterations of the survey, a stratified random sampling approach was used to determine the sample for the 2025 survey.

Quotas for each of CASA's 14 core stakeholder groups were set to ensure the sample is robust and representative of the CASA stakeholder population. The number of each stakeholder type that were invited and completed the survey is outlined in the table below.

Group	Туре	Invited	Completed (n)	Completed (%)	
Group A	Pilot Licence	2640	165	38%	
Group B	Maintenance Licence	660	29	7%	
Group C	Aerodromes		3	1%	
	Air Operators Certificate (AOC)		9	2%	
	Air Traffic Control (ATC) Licence	481	17	4%	
	Flight Training & Simulation Organisations	401	4	1%	
	Maintenance Organisation		9	2%	
	Maintenance Training Organisations		0	0%	
Group D	RPAS Operators	1320	51	12%	
Group E	Remote Pilot Licence	660	23	5%	
Group F	Dangerous Goods Training Organisation		8	2%	
	Delegates	311	25	6%	
	Design and Manufacturing Organisation		11	3%	
Group G	Registered Operator	660	82	19%	



The lower response rate in 2025, combined with the relatively static overall results and consistency of survey approach, suggests that while stakeholders are less likely to have 'extreme' positive or negative issues to report this year, engagement is lower (although still comparatively strong) because there are fewer burning platforms...







# **Overall satisfaction**

## Stakeholders are generally satisfied with CASA.

Overall, relationships with, and service from CASA is reported as satisfactory, and moving closer towards ideal.



Stakeholders assess CASA's performance positively and see them as meeting expectations in most areas:

- CASA are seen to be focused on industry needs and making changes to their processes and approaches based on industry feedback.
- CASA are providing tools and provision for aviation that are meeting the need for better speed, efficiency and points of interaction (e.g. online services).
- CASA leadership are perceived to be positively aligned and understanding of the needs of aviation and making changes accordingly.



CASA is generally supporting positive relationships

Interactions and relationships with CASA at the senior stakeholder level are viewed positively:

- CASA staff are generally approachable and amenable to open dialogue and communication.
- Stakeholders perceive an intention from senior management at CASA to work on fostering and supporting positive industry relationships.
- Some sense that CASA have recognised previous tensions and issues with historic interactions and are working to address them.

"We are really fortunate that we've come into that...I've started this tenure at a time where we've had two great industry liaison people...really helped set the scene for a very professional liaison between us and CASA."

"The relationship we have is really positive... I think that's partly because we're very active and partly because CASA is very responsive."

"One of the great things CASA have done... was develop a regulatory roadmap... industry have a say in that."

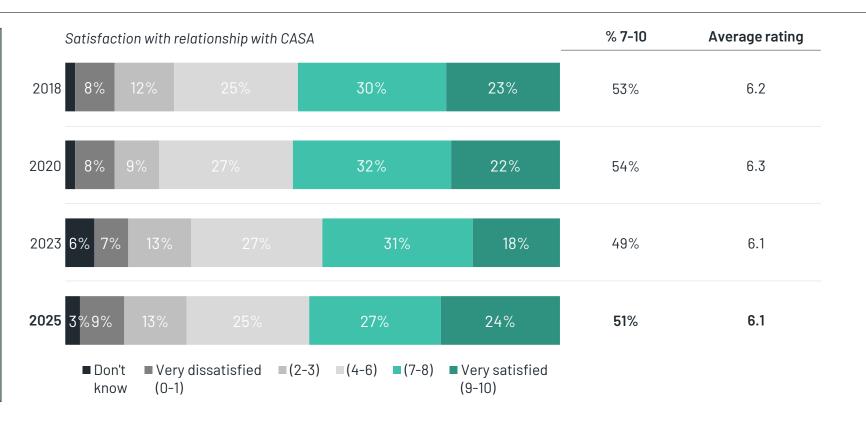


#### The survey data shows that overall satisfaction with CASA remains stable.

- Half (51%) of stakeholders are satisfied with their relationship with CASA, on par with 2023. Notably, the proportion who are 'very satisfied' has increased significantly since 2023.
- A quarter (24%) of stakeholders reported being very satisfied, an increase of 6-points since 2023. A similar proportion (25%) provided a neutral response consistent with previous years.
- In line with previous years, around one in five (22%) are dissatisfied, including 9% who are very dissatisfied.

Stakeholders who have been in contact with CASA in the last 3 months are significantly more likely to be dissatisfied with their relationship with CASA (28%, compared to 14% of stakeholders who have not interacted with CASA in the last 3 months).

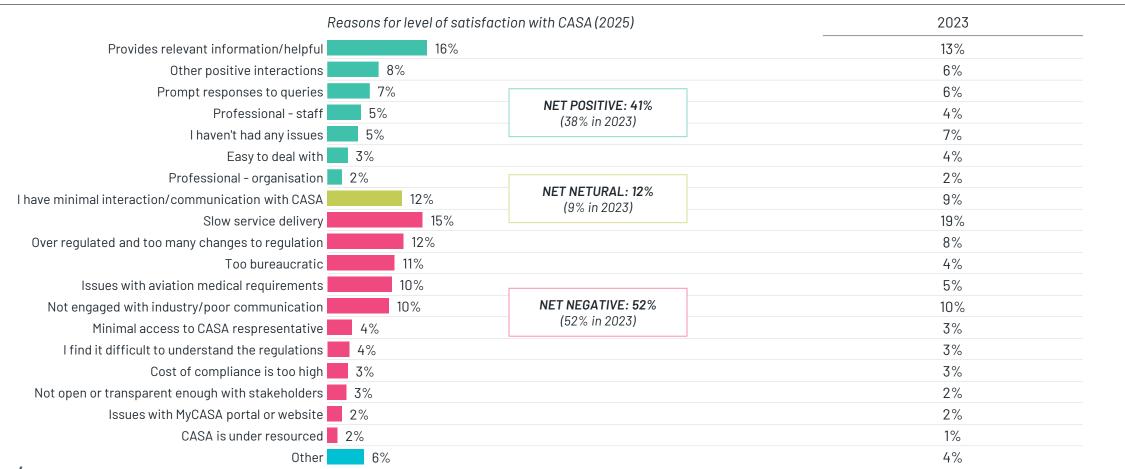
This likely reflects the impact of recent or ongoing issues that particular stakeholders are experiencing, rather than emerging issues with contact centres.





# CASA's provision of relevant and helpful information is driving stakeholder satisfaction, while slow service delivery continues to be the key reason for dissatisfaction.

Stakeholders who are very dissatisfied with their relationship with CASA were significantly more likely to cite CASA's lack of engagement with the industry (24%) and over regulation (34%) as a reason for their low rating.





# Despite stable quantitative results, qualitative interviews suggest CASA has made positive progress.



#### Stakeholders have seen change themselves

Stakeholders have noted positive change in their own interactions with CASA, especially at a senior level:

- Senior stakeholders sense a shift in tone and quality of relationship that has had positive trickle-down effects into different aspects of CASA's service delivery in the last 12-18 months.
- CASA staff also appear to have been briefed on incorporating different ways of working and seem to be moving in a more collaborative direction.
- The impacts on stakeholders have been both immediate and indirect – less management of interactions and issues about CASA raised by members and staff, as well more positive working relationships with CASA for themselves, that have allowed issues to be addressed in a more timely and effective way.



## Stakeholders have also heard about positive change from their members and staff

As well as seeing positive change firsthand, senior stakeholders have heard positive feedback from their members and staff about CASA's performance:

- While some tension and points of frustration do exist for those interacting with CASA at the less senior level, there is still a sense of positive progress and change.
- Initiatives that save time, and add a sense of efficiency into what is seen as an administratively heavy process are key to this positive progress.

"High-level engagement... responsiveness of senior management driven by the CEO... that's been something that's been pursued proactively."

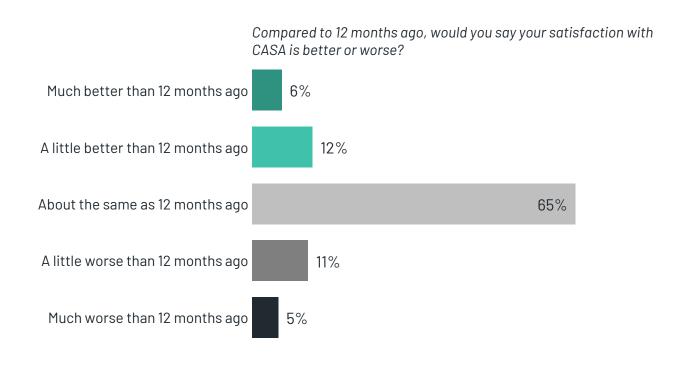
"There's a cultural shift. They've gone from punitive to more educative in some parts of the organisation." "We now have regular meetings with CASA. That never used to happen."

"They've definitely listened more in the last year... before it felt like we were being talked at. Now there's more back and forth."



# However, the sentiment of CASA making positive steps is not yet widespread, evidenced by consistent levels of satisfaction in the last 12 months (reported below) and over the last few years (reported earlier).

- When asked to measure the extent to which their satisfaction has improved over the last 12 months, two-thirds (65%) of stakeholders indicated it was about the same as 12 months ago.
- One in five (18%) specified their level of satisfaction with CASA was better than 12 months ago, including 6% who felt it was much better.
- One in seven (16%) indicated their level of satisfaction was worse than 12 months ago, with 5% stating it was much worse.



Stakeholders who have been in contact with CASA in the last 3 months were significantly more likely to be indicate their satisfaction with CASA was worse than 12 months ago (25%, compared to 7% of stakeholders who have not interacted with CASA in the last 3 months).



# Where positive progress has been achieved, this can be attributed to systems, relationship and communications changes.

However, in each of these domains, widespread quantitative changes are not being observed.



Listening to industry

And making changes according to industry need and feedback



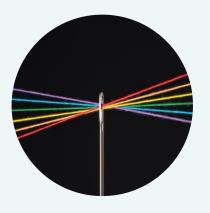
Active participation with industry

Driving sense of collaboration and 2way communication



Speed and efficiency

Reducing the cost and time burden on industry



Acknowledgement of sector diversity

Positive initiatives beyond 'traditional' aviation

"There's definitely been a step change compared to three years ago."



## CASA are felt to be listening to industry more than in previous times.

Stakeholders feel that CASA are more actively engaged with industry needs and are listening to what they are saying about their needs, challenges and ideal ways of working.



- Across the sector, stakeholders mention more regular meetings with CASA, at both a senior and administrative level as a signifier that CASA are engaged, listening and committed to working together.
- CASA are seen to be taking on board the feedback from industry about the need for more efficient processes.
- Examples of change due to active listening have been the development of the Plain English Guides and the move from a centralised approach back to having more local presence.

**47**% of stakeholders are satisfied with the way CASA maintains an open and transparent relationship with them.







"I'm talking to someone at CASA probably at least 2-3 times a week. And I have regular meetings with senior leadership."

"It's better if there's someone you know you can just pick up the phone to and call, and it's not all through formal channels."



Source: A2. How satisfied you are with the following aspects of CASA's performance? Base: Total sample, unweighted. 2025, n=436; 2023, n=683; 2020, n=755; 2018, n=1,168.

## CASA are seen to be participating with industry more actively.

By attending industry events, both face to face and online, CASA are seen to have moved to a more active presence across industry, which is seen as positive.



- CASA staff are seen to have had more of a presence at industry events such as training sessions, industry events and more.
- This presence is seen to be indicative of a commitment to working together with industry across sectors, and to learn more.
- Practically, the increased CASA presence at events gives a sense that CASA will become more knowledgeable about the dynamics and intricacies of each sector, that will ultimately facilitate faster and more efficient interactions, approvals and more.

36% of stakeholders are satisfied with the way CASA works collaboratively with industry.





"We had a CASA person there for the entire course, because we invited them... that worked really well."

"Quarterly briefings with safety topics that's very valuable. Our staff react very positively to that."

"They [CASA] show up. They came to our training forum and stayed the whole day—not just a speech and go."



14%

know

14%

(0-1)

(9-10)

20%

## Speed and efficiency are seen to have improved.

Instrumental to effective business functioning, CASA's increased speed and efficiency in recent times is seen to be supportive of more optimal functioning for stakeholders and industry members.



- The approvals process and processing times is seen to have improved in the last 12–18 months.
- Plain English guides have helped industry work with CASA in more effective ways.
- Online applications and processes have helped to support a faster and more efficient system.

58% of stakeholders rate the development of plain					% 7-10		Average rating			
English guides as good or very good.				2025	2023	2025	2023			
11% 6% 8%	18%	26%	32%	58%	58%	6.9	7.1			
54% of stakeholders rate the availability of online resources as good or very good.										
5%7% 7%		27%	27%	54%	56%	6.6	6.7			
	/ery poor □ 0-1)	(2-3) (4-6)	(7-8) <b>V</b> ery good (9-10)							



"The online portal is miles better than is used to be... there are still hiccups, but it's not like the old days."

"Plain English guides... are awesome.
They really are changing people's
behavior because they are written so
much better."

"For general aviation, the plain English guides—fantastic. Really, really good..
Boom, boom, boom, 1-2-3-4-5. Not going through this with legalese."

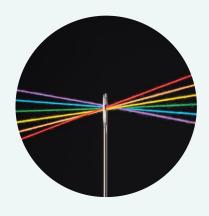
"They've digitised a lot and that's working better for us now."



Source: A3. How do you rate CASA on the following aspects? Base: Total sample, unweighted. 2025, n=436; 2023, n=683.

## CASA have progressed and flexed to acknowledge sector diversity.

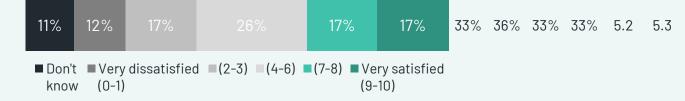
With an acknowledgement and provision of resources to sectors outside of traditional aviation, CASA's actions have given stakeholders an impression of flexibility and agility.



- This is mainly driven by initiatives around drones.
- Updating policies and procedures to include issues related to drones is seen as positive.
- Dedication of resources, both staff and time, to new sectors is also seen as positive.
- For some in traditional aviation, a potential sense of too much being assigned to new and diverse sectors of aviation leading to scarcer resources in their sectors.

**33**% of stakeholders are satisfied with the way CASA balances consistency and flexibility.







"From a licensing perspective, it sounds like that space they've done really well."

"Drones are taking up so much resource... traditional aviation would have really liked to have had some of that energy."



## Stakeholders who have recently interacted with CASA (within the last 3 months) were significantly more likely to be dissatisfied with the way CASA:

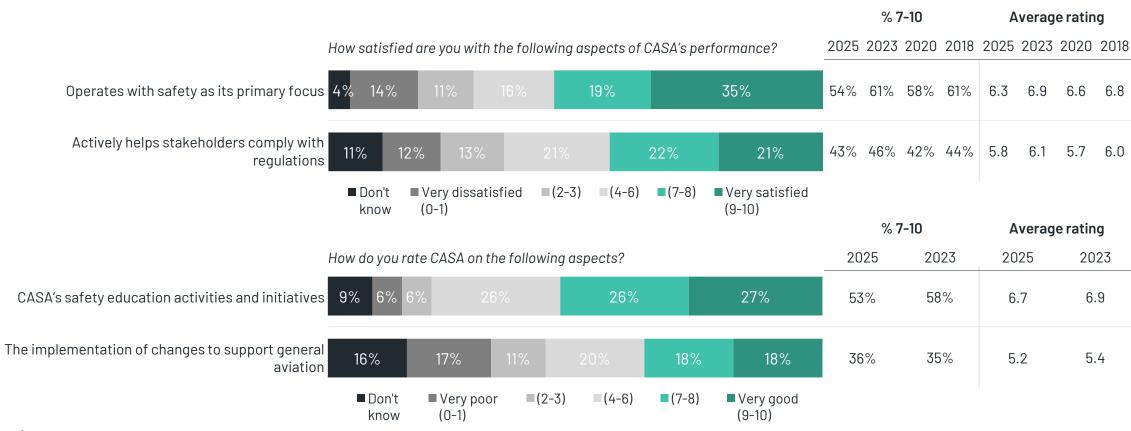
- Balances consistency and flexibility (38%, compared to 19% who have not interacted with CASA in the last 3 months),
- Works collaboratively with industry (34%, compared to 21%),
- Maintains an open and transparent relationship with stakeholders (30%, compared to 19%).

RPAS Operators were significantly more likely to be satisfied with each aspect of CASA's performance listed above.



### Satisfaction with the way CASA supports stakeholders and industry remains stable.

- Four in ten (43%) stakeholders are satisfied with the way CASA actively helps stakeholders comply with regulations, and a third (36%) rate the implementation of changes to support general aviation as good or very good (compared to 44% and 35% respectively in 2023).
- Compared to 2023, a larger proportion of stakeholders provided a neutral rating of CASA's safety education activities and initiatives (26%, compared to 19% in 2023).





#### Stakeholders who have recently engaged with CASA were:

- significantly less likely to rate CASA as *good or very good* in relation to the implementation of changes to support general aviation (31%, compared to 41% who have not interacted with CASA in the last 3 months)
- significantly more likely to be dissatisfied with the way CASA actively helps stakeholders comply with regulations (30%, compared to 19%), and operates with safety as its primary focus (30%, compared to 19%).



## Senior CASA staff are key

Those who reported seeing positive shifts in CASA's performance attribute this to the role of specific senior CASA staff, who are seen to have implemented positive change through:

- Personal commitment to the industry and to making positive changes,
- A focus on personal relationships being available, convening regular meetings with senior stakeholders and wanting to work collaboratively,
- A shift in tone in the relationship between CASA and industry, from one of compliance to a more collegiate one,
- CASA staff training and feedback with a focus on how staff can work with and support industry.

It is also noted by stakeholders, that there have been more recent appointments within CASA of senior staff who have more understanding of the aviation industry, which has helped with both policy and procedures as well as relationships.



It's a really good relationship...
we got good access to, you
know, from the executive down
through senior and middle
management on a Teams
meeting once a month..."

"The new leadership has made a difference... we've had better access and faster responses at the top level."

"High-level engagement...
responsiveness of the senior
management driven by senior
leadership... that's been
something that's been pursued
proactively."



# Despite some existing frustrations and points of tension, CASA's current performance seen as close to ideal by some stakeholders

Stakeholders recognise the complexity of industry and the challenges facing CASA.

- As such, most stakeholders acknowledge, implicitly or explicitly, the likelihood of some ongoing disconnect in organisational goals and focus of CASA vs. aviation companies, bodies and associations.
- Realistically, the CASA agenda is not seen as being able to fully align with the agenda of stakeholders, which means that stakeholder expectations of ideal service include some elements of bureaucracy and processes that may not fully suit them, their businesses or their association members.

Feedback that CASA is providing a service that is generally not too far away from stakeholder expectations is a positive sign of the changes that have been evident in the last few years.

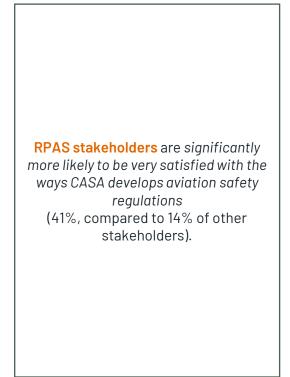
"All the working groups, to be honest, they're all working relatively well... regulatory auditing requirements for compliance—I wouldn't play with that.."

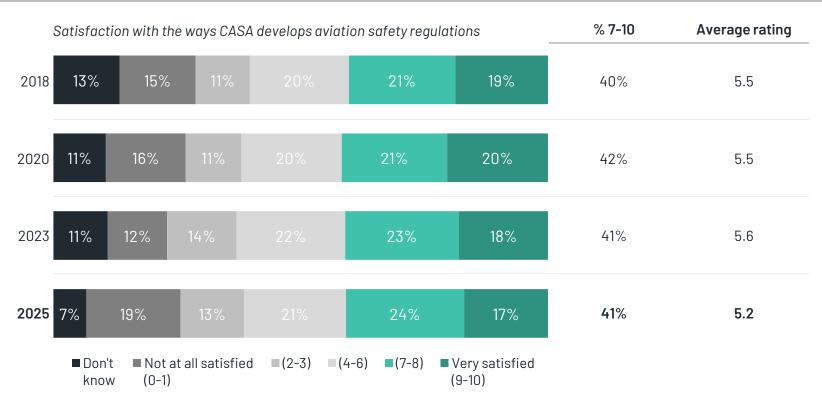
"Versus ideal? Not too far away overall."



### Satisfaction with the way CASA develops aviation safety regulations is stable

- Four in ten (41%) stakeholders are satisfied with the way CASA develops aviation safety regulations, including 17% who are very satisfied. These results are on par with 2023 (41% satisfied, 18% very satisfied). However, the proportion who are very dissatisfied has increased (19%, up 7 points). Stakeholders who cited over regulation and CASA being too bureaucratic as key reasons for dissatisfaction with CASA overall, were more likely to be dissatisfied with the ways CASA develops aviation safety regulations.
- The average rating has slightly decreased in 2025, now at 5.2 (down from 5.6).







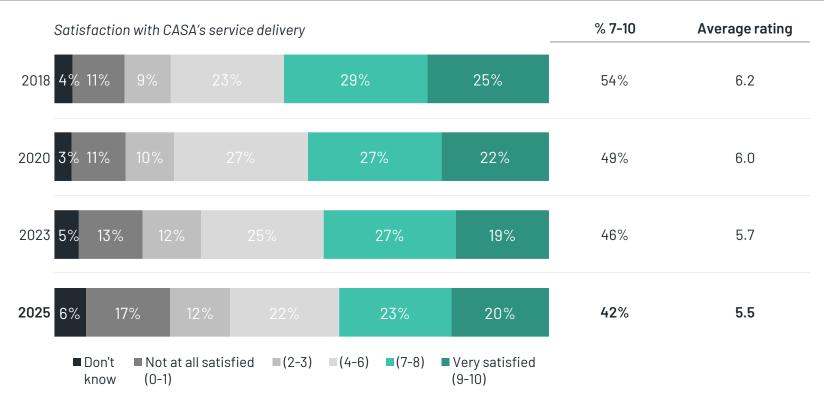
## Satisfaction with CASA's service delivery is trending down, recording a 12-point decline since 2018.

- This result, along with stakeholders citing slow service delivery as the main reason for dissatisfaction (reported earlier), highlight service delivery as a key area for improvement.
- Four in ten (42%) stakeholders are satisfied with CASA's service delivery, including 20% who are very satisfied. While the proportion who are very satisfied is consistent with 2023, a greater number are very dissatisfied (17%, up from 13% in 2023).
- The average score in 2025 is 5.5, down from 6.2 in 2018.

Stakeholders who have been in contact with CASA in the last 3 months are significantly more likely to be dissatisfied with CASA's service delivery

(35%, compared to 23% of stakeholders who have not interacted with CASA in the last 3 months).

RPAS stakeholders are significantly more likely to be very satisfied with CASA's service delivery (51%, compared to 16% of other stakeholders).



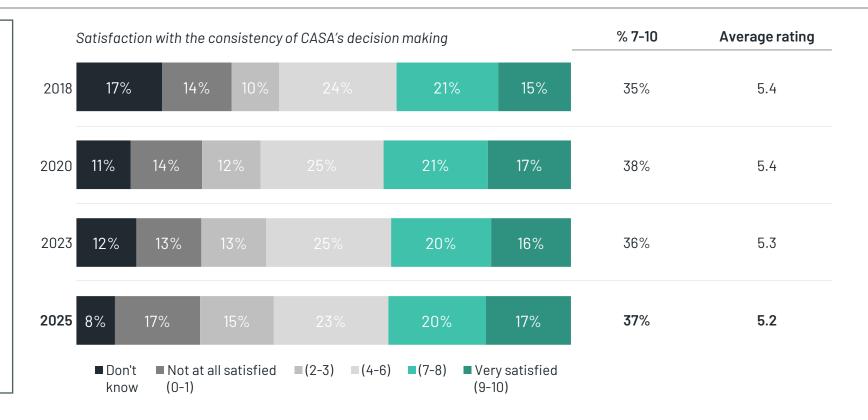


## Satisfaction with CASA's consistency in decision making is polarised.

- More than a third (37%) of stakeholders are satisfied with the consistency of CASA's decision making, including 17% who are very satisfied. These results remain stable with previous waves.
- However, the proportion who are dissatisfied with CASA's consistency in decision making is increasing, now at 32% (up from 26% in 2023). This is driven by 4-point increase in the proportion who are very dissatisfied (17%, up from 13%).

Stakeholders who have been in contact with CASA in the last 3 months are significantly more likely to be dissatisfied with the consistency of CASA's decision making (38%, compared to 26% of stakeholders who have not interacted with CASA in the last 3 months).

RPAS stakeholders are significantly more likely to be very satisfied with the consistency of CASA's decision making (43%, compared to 14% of other stakeholders).





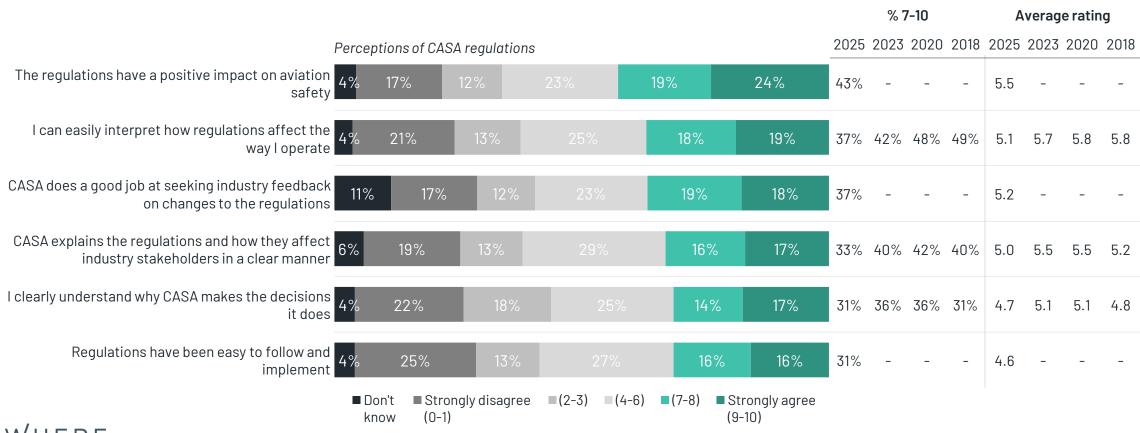




# **Perceptions of CASA**

# Perceptions of CASA regulations are polarised; regulations are seen to have a positive impact, despite a lack of transparency in decision-making.

- Many stakeholders (43%) agree CASA regulations have a positive impact on aviation safety. While a third (37%) can easily interpret how regulations affect the way they operate, a similar proportion do not believe regulations have been easy to follow and implement (38%).
- Similarly, while some agree CASA does a good job at seeking industry feedback on changes to the regulations (37%) and explains the regulations in a clear manner (33%), some do not clearly understand why CASA makes the decisions it does (40%).





# Stakeholders who have recently engaged with CASA were significantly less likely to agree that:

- They clearly understand why CASA makes the decisions it does (26%, compared to 38% who have not interacted with CASA in the last 3 months), and
- Regulations have been easy to follow and implement (25%, compared to 39% who have not interacted with CASA in the last 3 months).

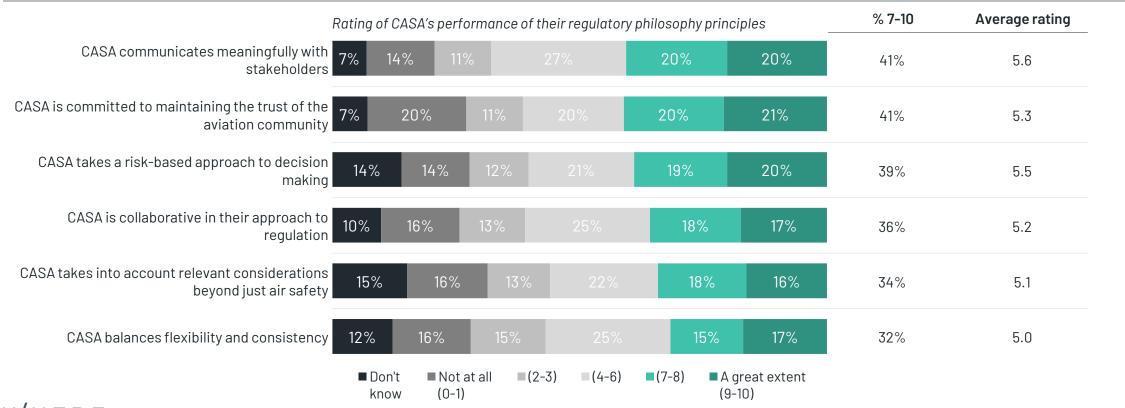
#### RPAS Operators were significantly more likely to agree that:

- The regulations have a positive impact on aviation safety (73% vs 39% of other stakeholders),
- They can easily interpret how regulations affect the way I operate (71%),
- Regulations have been easy to follow and implement (67%),
- CASA explains the regulations and how they affect industry stakeholders in a clear manner (61%),
- They clearly understand why CASA makes the decisions it does (61%), and
- CASA does a good job at seeking industry feedback on changes to the regulations (57%).



### Ratings of CASA's performance of the regulatory philosophy principles are mixed.

- When asked to rate CASA's performance of the regulatory philosophy principles, many stakeholders provided neutral ratings.
- Four in ten believe CASA communicates meaningfully with stakeholders (41%, a great extent), is committed to maintain the trust of the aviation community (41%) and takes a risk-based approach to decision making (39%).
- Around a third believe CASA is collaborative in their approach to regulation (36%), takes into account relevant considerations beyond just air safety (34%), and balances flexibility and consistency (32%).





## RPAS Operators were significantly more likely to agree that CASA perform their regulatory philosophy principles well:

- CASA is committed to maintaining the trust of the aviation community (71% well or to a great extent, compared to 37% of other stakeholders),
- CASA communicates meaningfully with stakeholders (67% rate it well or to a great extent, compared to 37% of other stakeholders),
- CASA takes a risk-based approach to decision making (57%, compared to 37% of other stakeholders),
- CASA is collaborative in their approach to regulation (57%, compared to 33% of other stakeholders),
- CASA balances flexibility and consistency (57%, compared to 28% of other stakeholders), and
- CASA takes into account relevant considerations beyond just air safety (51%, compared to 32% of other stakeholders).





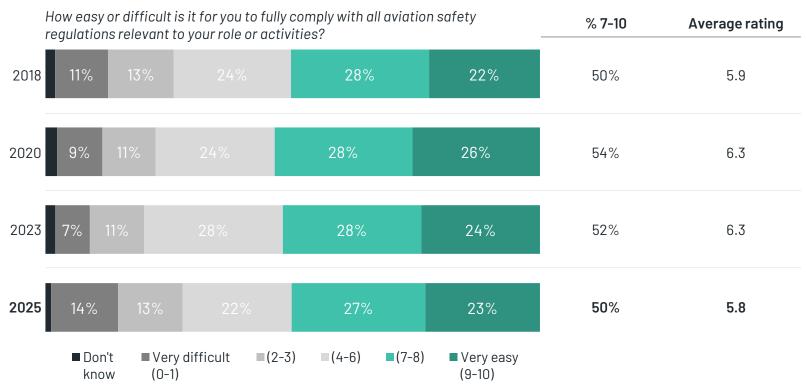


# Compliance

### Stakeholders find it easy to comply with all aviation safety regulations.

- In line with previous years, around half (50%) of stakeholders find it easy to fully comply with all aviation safety regulations, including 23% who find it very easy.
- However, a quarter (27%) find it difficult to comply with all aviation safety regulations, with a 7-point increase in the proportion of stakeholders who find it very difficult (14%). Stakeholders who cited over regulation and CASA being too bureaucratic as key reasons for dissatisfaction with CASA overall, were more likely to find it difficult to fully comply with all safety regulations.



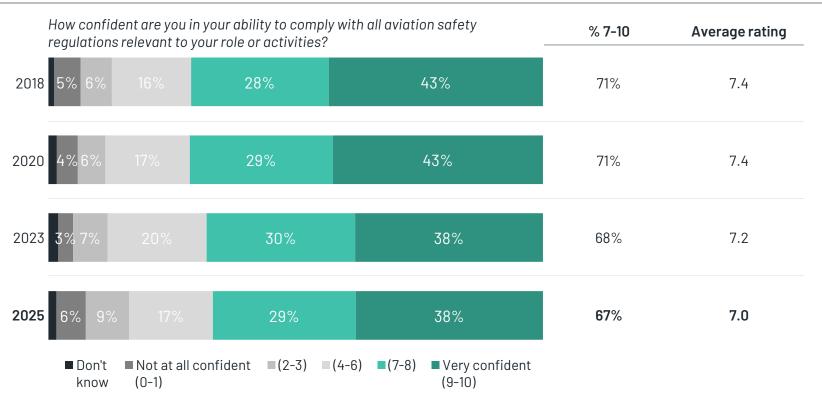




# Confidence in ability to comply with all aviation safety regulations is high, however it is trending downwards.

- In 2025, most (67%) stakeholders are confident in their ability to comply with all aviation safety regulations this result is on par with 2023, and 4 points lower than 2020 and 2018.
- There has been a slight, non-significant decrease in the average rating since 2023.



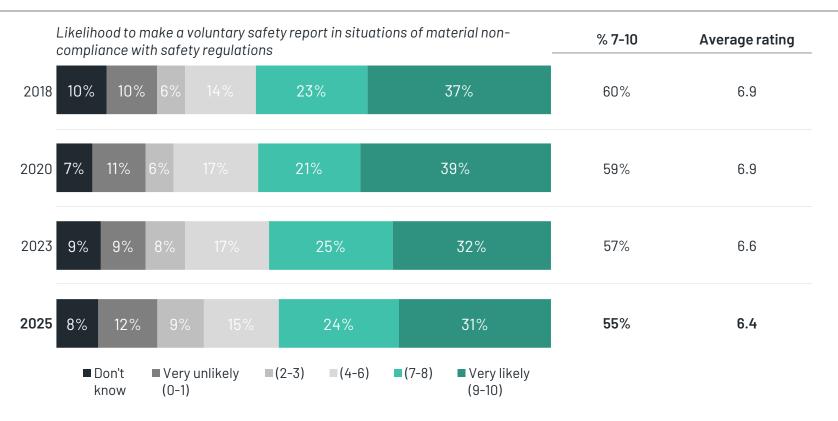




# High likelihood to make a voluntary safety report in situations of material non-compliance with safety regulations remains stable.

- More than half (55%) of stakeholders are likely to make a voluntary safety report in situations of material non-compliance with safety regulations, including 31% who are very likely.
- The proportion who are unlikely to make a voluntary report has increased 4 points in 2025 (21%, up from 17% in 2023).

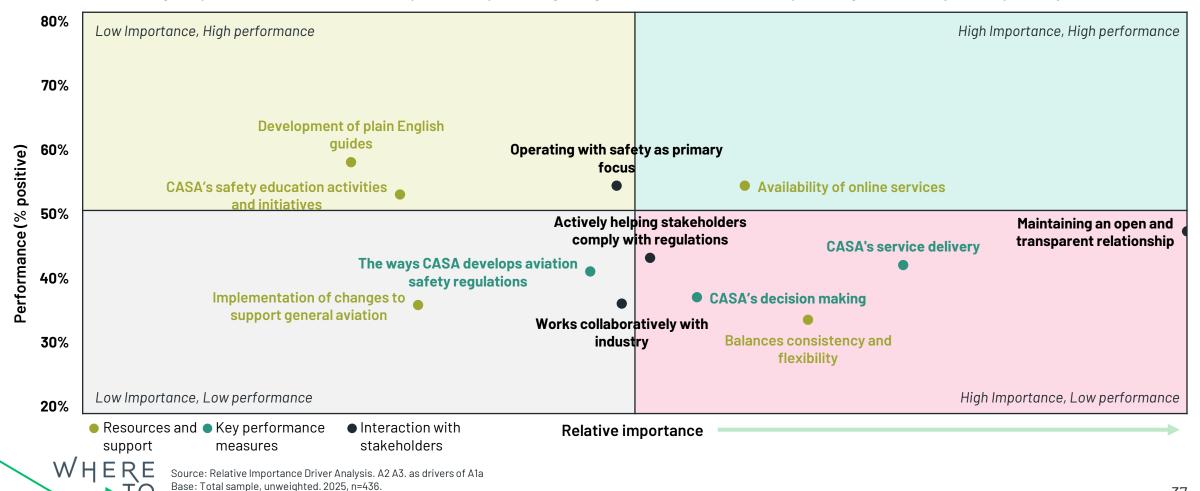






# A performance-importance grid identified key priorities to drive increased satisfaction: Maintaining open and transparent relationships, service delivery, balancing consistency and flexibility and decision making.

- Areas of high importance that require improvement include balancing consistency and flexibility (33%) and consistency in decision making (37%).
- The strongest performers are the development of plain English guides (58%) and CASA operating with safety as its primary focus (54%).



# WHERE

Analysis shows that the key drivers of overall satisfaction with CASA are (in order):

- 1. Maintaining an open and transparent relationship
- 2. Perceptions of CASA's service delivery
- 3. A perception of balancing consistency and flexibility
- 4. Availability of online resources
- 5. CASA's decision making

Results from this year suggest that improving 1,2,3 and 5 from the above will be key to improving the overall satisfaction number

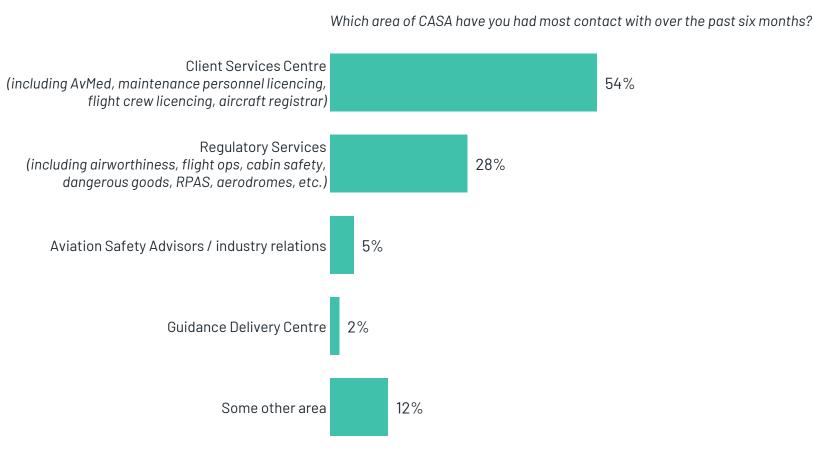




#### **Contact with CASA**

#### The Client Services Centre and Regulatory Services are the main areas of CASA that stakeholders engage with

Very few indicated that most of their contact with CASA was with Aviation Safety Advisors (5%) or the Guidance Delivery Centre (2%)





### More than half (54%) of stakeholders have been in contact with CASA within the last 3 months

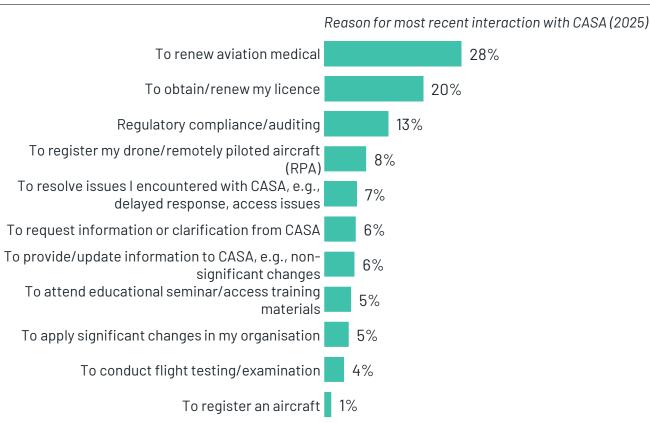
- Results indicate that CASA engages with stakeholders regularly, with more than half (56%) reporting they have been in contact with CASA
  at least twice in the last 6 months.
- However, a quarter (25%) mentioned they hadn't been in contact with CASA in the last 6 months.





#### Recent contact with CASA have mainly been about renewing aviation medical certificates (28%) or to obtaining or renewing a licence (20%)

- Other reasons for contacting CASA are in relation to regulatory compliance/auditing (13%), registering a drone/RPA (8%), or to resolve communication and access issues (6%).
- Some stakeholders wanted some clarification and updated information from CASA, while others wanted information about CASA's training materials.



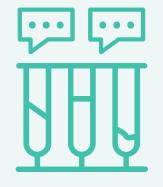






#### **Future focus**

## Stakeholders do see areas for focus and improvement – some of which are legacy issues, and par for the course in safety / Government departments "



Inconsistency across operational areas

Making dealing with CASA somewhat unpredictable



Red tape and bureaucracy

Stakeholders feel frustration with levels of bureaucracy – a step change vs their own areas of expertise



Lack of transparency

Increased transparency could serve to improve day to day interactions and overall relationships



Stakeholders see CASA as generally under resourced – which has a knock on effect on business timelines

"What we get is box-ticking, not problem-solving."



## Some teams and areas within CASA are seen to perform at higher levels than others, and some inconsistency within functions exists



A lack of consistency between operational teams means that interacting with CASA can be somewhat hit or miss – undermining an overall expectation of solid and consistent service, with adjustments needing to be made within aviation businesses.

- Senior leadership is seen to be on board with change, pro-active and focused on improvement and positive relationships, but this is not always reflected in the day-to-day interactions with 'frontline' CASA staff.
- Planning and communications across CASA teams and functions not always seen to be fluid and co-ordinated.
- Operational staff and inspectors perform to varying levels of quality lack of overall consistency.
- Legal interactions seen as more problematic than in other areas.

"The syllabus and exams don't align with the apprenticeship pathway. The system just doesn't function."

"We've been having meetings at the CEO level... and I'm now down to someone doing the assessment who's never done this process before"

"Some people in CASA really appear to be of the school of thought that you send all your emails in the last half hour of the day, so people can't ring you back."

"There is a disconnect between CASA legal and CASA operational. The legal team doesn't always understand the implications of their actions on operators."

"You go from constructive conversations with the ops team, and then once legal steps in, it becomes combative."



## CASA is seen as very bureaucratic, held back by red tape and adherence to a multitude of processes



Dealing with CASA can feel frustrating for stakeholders and others within their organisations. While it is recognised that as a Government function and with a need for safety above all else, there will be some inevitable amount of red tape, there is seen as space to reduce this, and to speed things up further.

- Bureaucratic approach more apparent during centralisation of CASA. A move back to more local and regional presence has somewhat mitigated it, but the overall impression is still one of a high level of bureaucracy that means longer wait times and an increased burden on the industry.
- For some, the lack of deep industry expertise amongst CASA staff seen to lead to an increased reliance on bureaucracy and red tape appetite exists for more flight expertise hires.
- The key impact of bureaucracy is long wait times for action / decisions / outcomes which are barriers to effective business functioning

"You get told 'we'll get back to you in 10 days'... and two months later you're still chasing."

"Quite honestly, I've just come to expect the response to be glacial."

"There's a broad perception... that field people [in CASA] are people who couldn't make it as pilots"

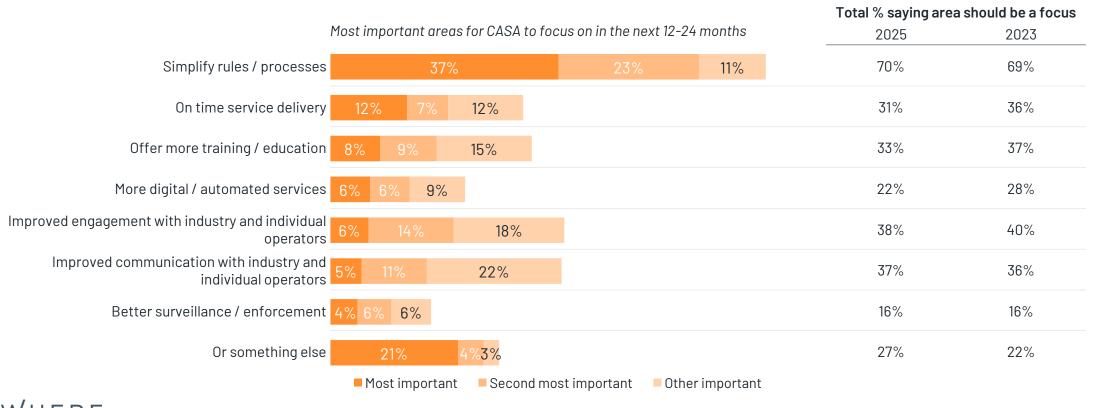
"You can spend weeks chasing them just to get a phone call returned."

"It would be good to buy them a coffee, have a chat. It's more informal. But they aren't allowed to do that.... We said we'd put them up in accommodation to come and they couldn't do that either..."



## Most stakeholders believe the simplification of rules and processes should continue to be a key focus area for CASA

- Seven in ten stakeholders listed simplifying rules and processes as an important area for CASA to focus on in the next 12-24 months, including 37% who said it was the most important area to focus on.
- Improving engagement (38%) and communication (37%) with industry and individual operators are also considered important by stakeholders.





#### A lack of transparency can inhibit effective business planning and operations



CASA are felt by some to be deliberately obtuse, with a real opportunity to improve stakeholder experience and perceptions through more transparent processes and communications.

- Transparency and clearer communications around expected timelines for actions and decisions, as well as regular updates could add to stakeholder satisfaction with CASA.
- The sense that processes and decisions are taking place within a mysterious system that is hard for outsiders to understand reduces the sense of collaboration and partnership that stakeholders would ideally like to have with CASA.

There's just no transparency. You lodge something, and it disappears into a black hole."

"There's no clear reason why some things are delayed and others aren't... It feels arbitrary

"We often don't know if someone is even working on it

"They don't tell you what to expect or how long it will take—it just disappears."

"I'll give you an example. A pilot medical.

We need to know when it'll come back
because it impacts operations. But is it
taking so long because it's a complex case
so we need to wait longer and factor that
in, or because it's just in a pile on
someone's desk?"



## Under resourced and light on in-field resourcing, CASA's slower speed seen to be inevitable by some



The lack of more experienced CASA staff on the ground is a key barrier to speed and efficiency, but is acknowledged by some as realistic for a Government department that is stretched and reliant on finite resources.

- For some stakeholders, there is a desire to balance the focus on safety with innovation to ensure that CASA is up to speed with modern industry dynamics.
- Others believe that a refocusing of resources, with more in field personnel vs in office staff could be beneficial to industry.

"The guys and girls in the field... are either overly stretched, overburdened or under-resourced. And I think under-empowered."

"We've got this non-scalable problem... it's case by case, labour-intensive and slow... it's not CASA's fault, but they're hamstrung."

"I would look at it from a workforce perspective first... we've arguably got a shortage of pilots, aircraft maintenance engineers and ground staff."



#### WHERE TO

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