

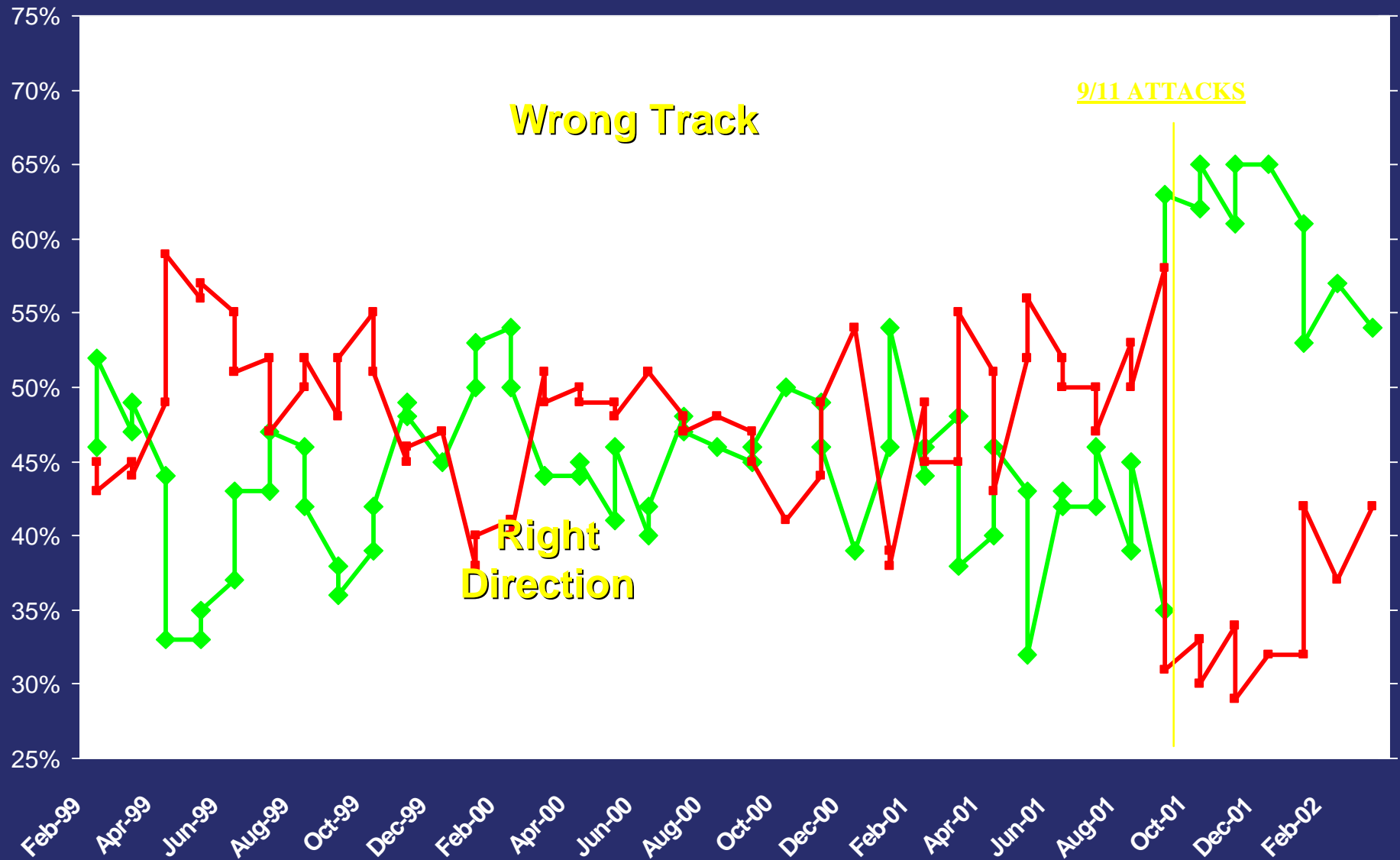
Aviation Security – What is the Public Telling Us?

Presented by:
Dee Allsop
March 26, 2002



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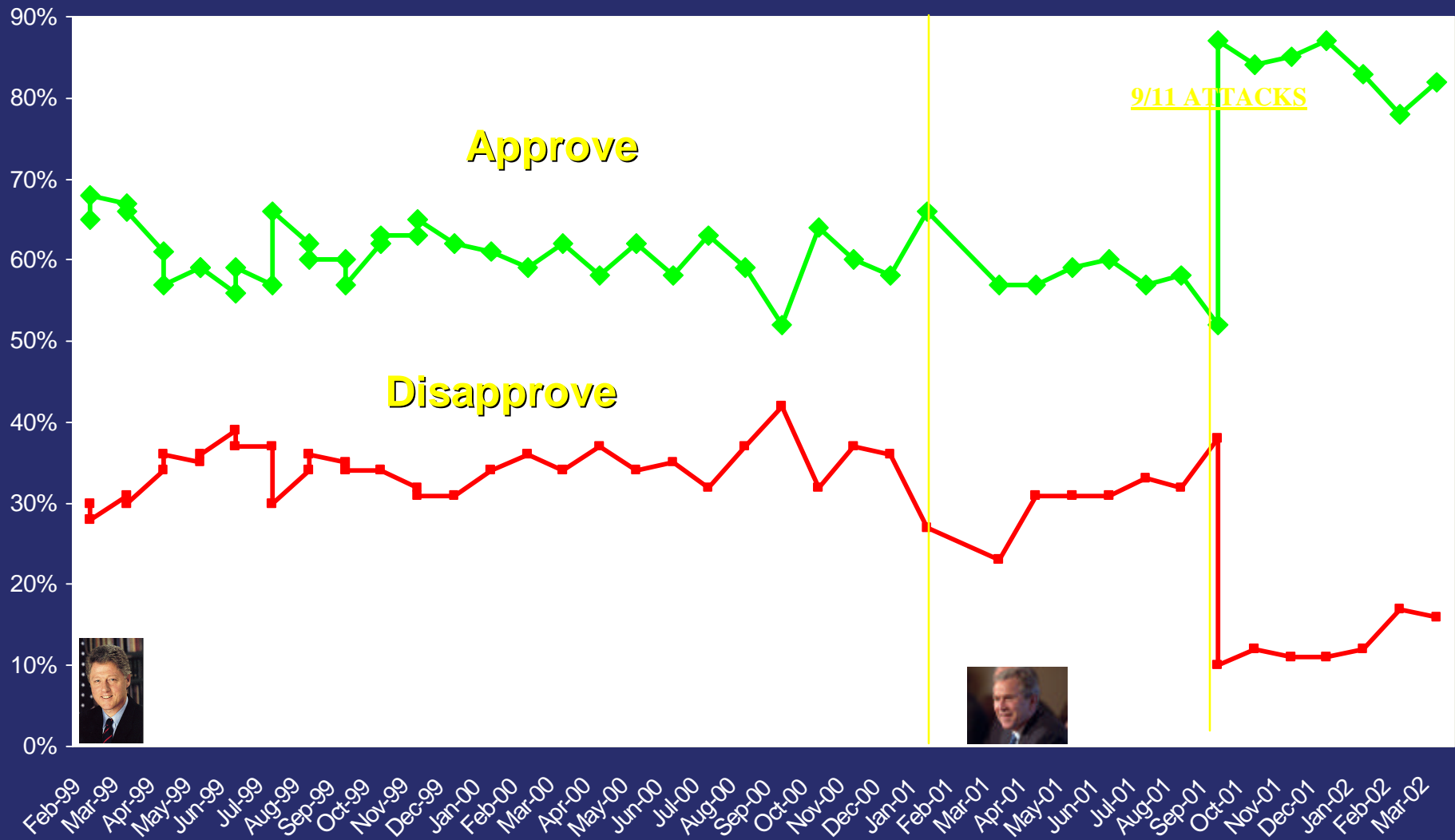
Mood of the United States



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Generally speaking, would you say that things in the COUNTRY are going in the RIGHT DIRECTION, or have they pretty seriously gotten off on the WRONG TRACK?

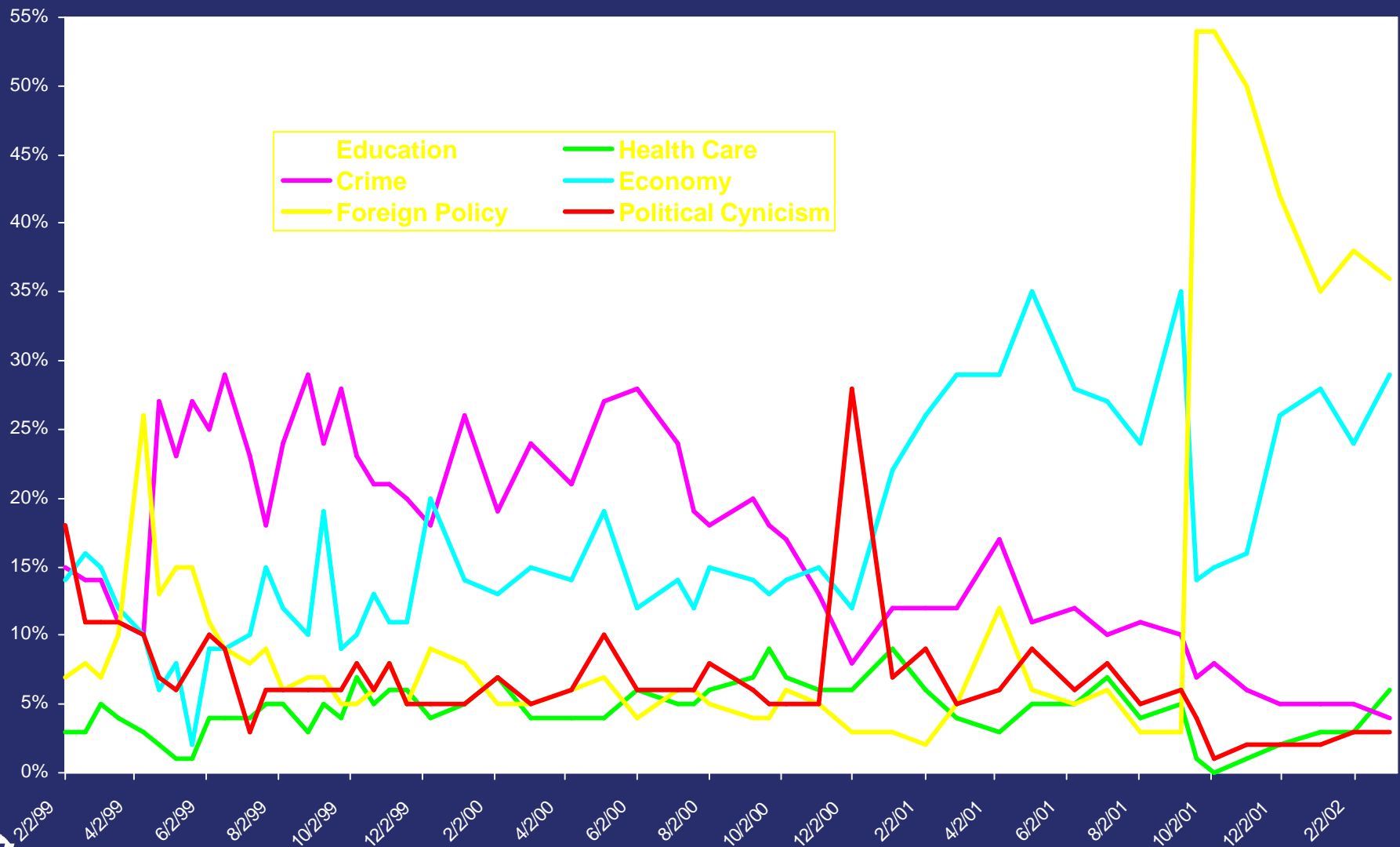
Presidential Job Approval



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Do you approve or disapprove of the way Bill Clinton/George W. Bush is handling his job as president? Would that be strongly (approve/disapprove) or just somewhat (approve/disapprove)?

Most Important Problem (Jan 1999 – Present)



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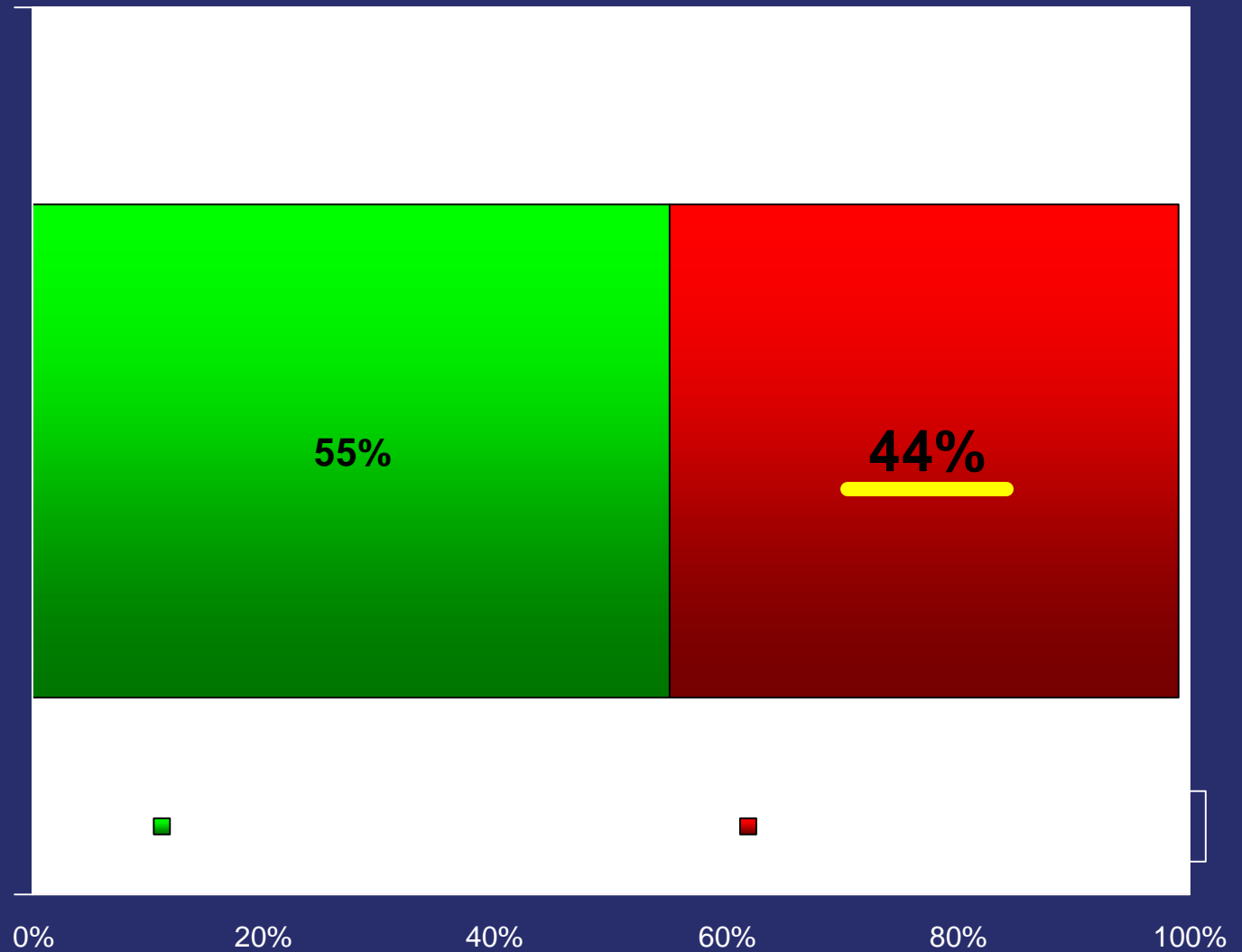
What would you say is the SINGLE MOST important problem facing the United States today, that is, the one that you, yourself, are most concerned about?

Attitudes Toward Travel and Security



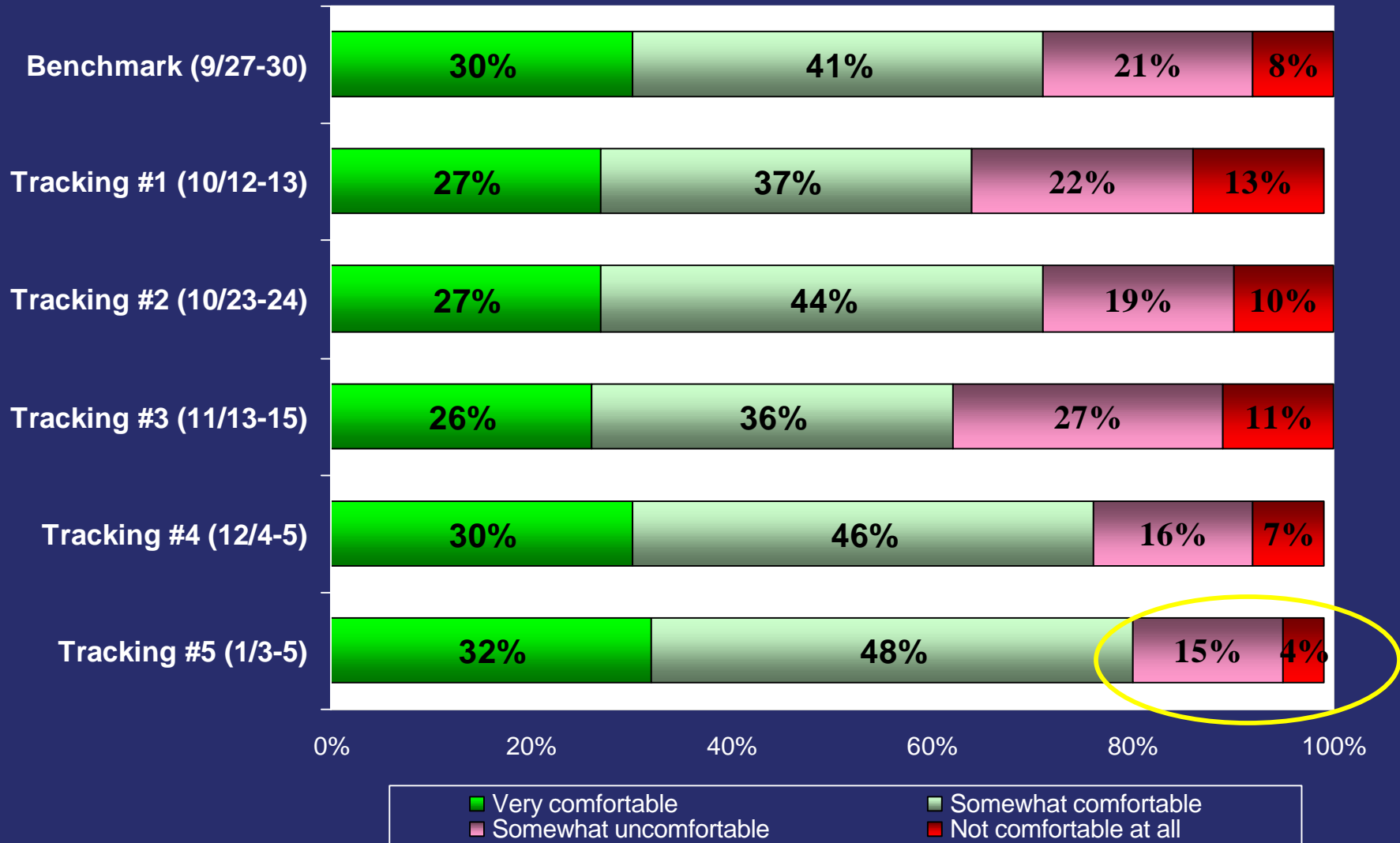
Public Fear of Flying???

Gallup Poll
(Feb 2002)



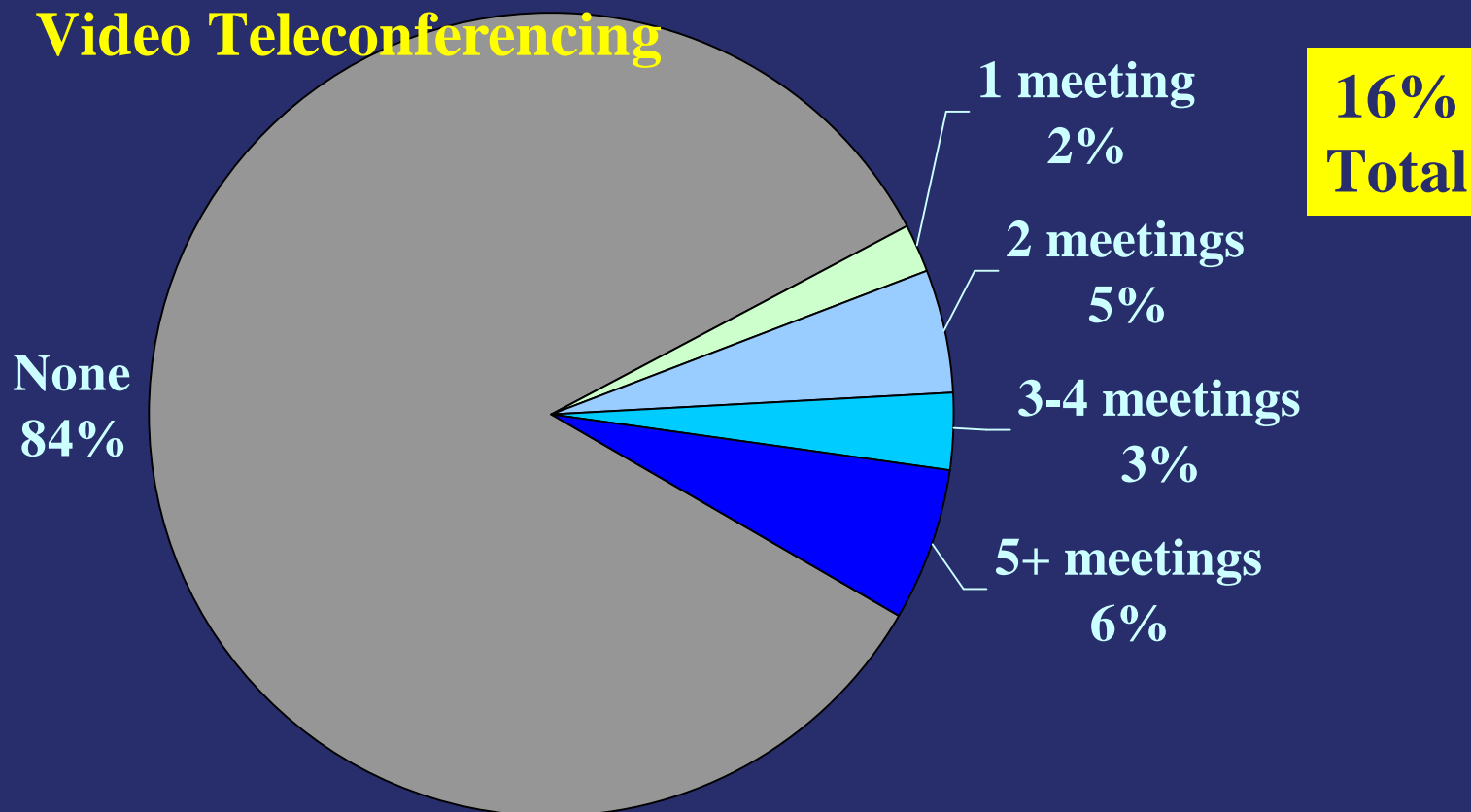
Level of Comfort

When thinking about your next airline flight, how would you describe your comfort level with flying at this time?



Alternatives to Commercial Air Travel Catching On

How many meetings have you attended via **video teleconferencing** or the internet during the last six months that you would have otherwise flown to?



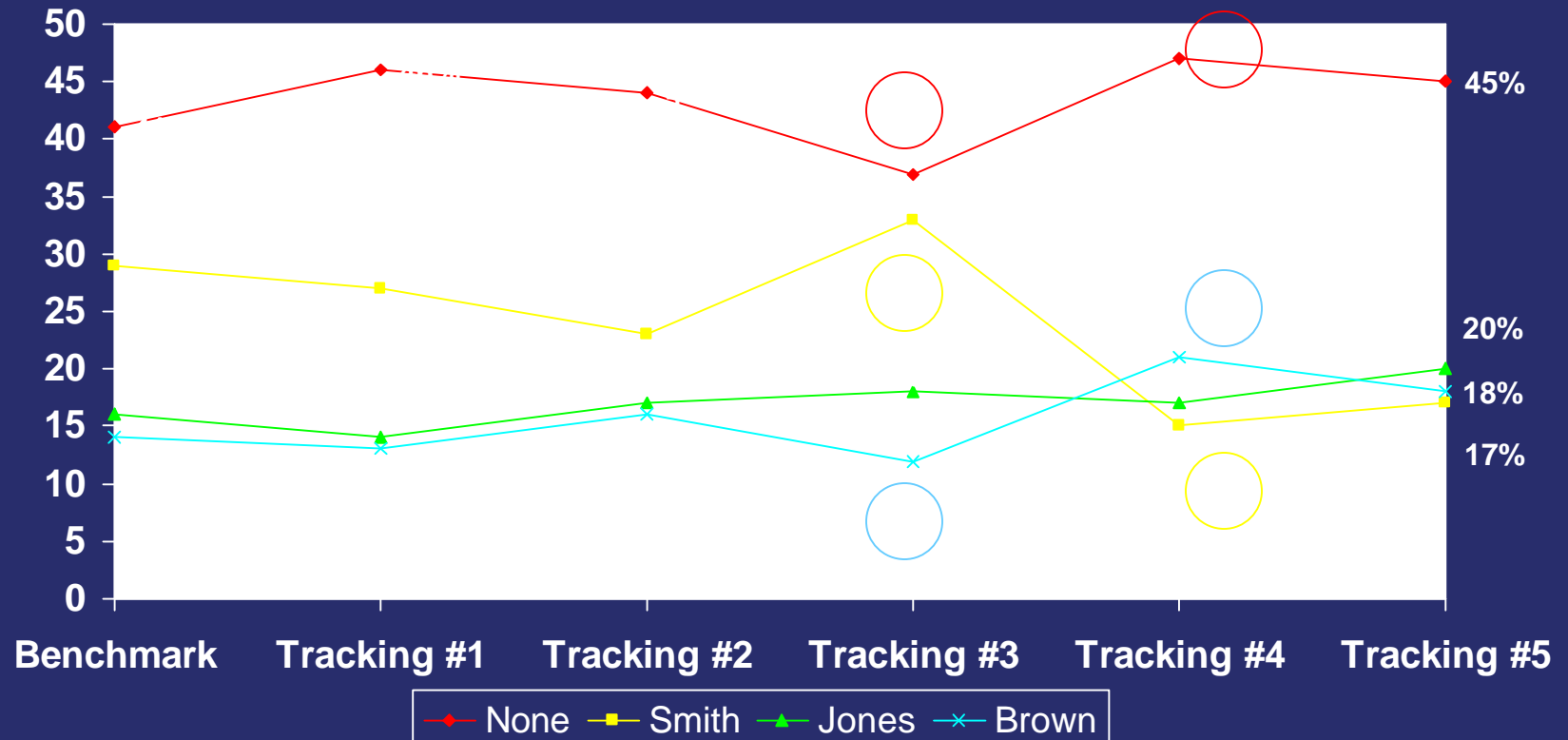
Top Reason NOT to Fly: “None of the above”

Now, I would like to read you the opinions of three hypothetical people about travel. Please tell me which opinion comes closest to your own.

SMITH is **concerned about the security of air travel** and has decided NOT to travel by airplane until travel becomes safer.

BROWN is **frustrated by the delays and hassles** of flying following tighter security and has decided NOT to travel until it is more convenient.

JONES is **concerned about the uncertain economy** and has decided NOT to travel in order to save money,



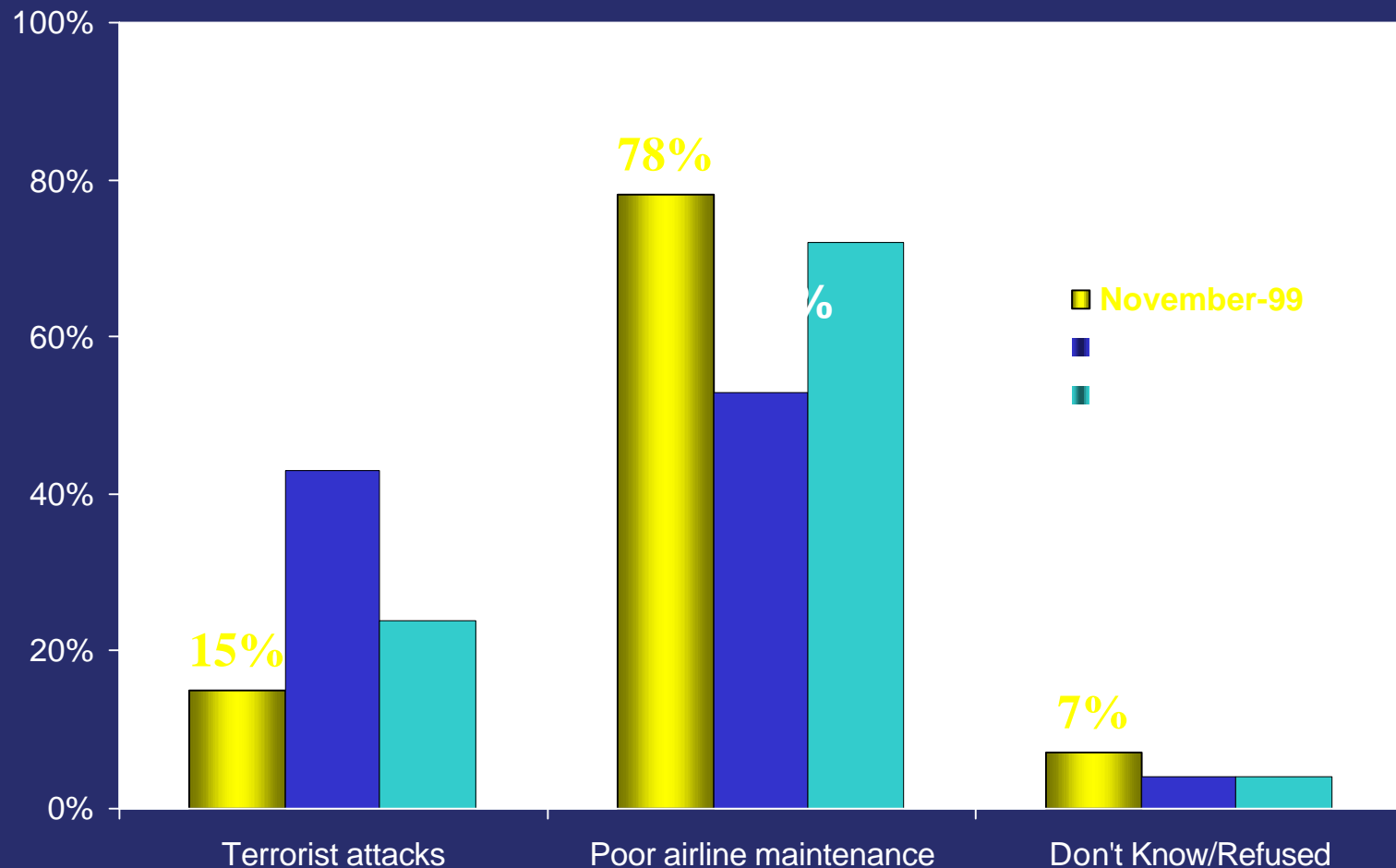
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Boeing Tracking Study
N=800/300 Frequent Business/Leisure Travelers



Poor airline maintenance the greater threat

Returning to Pre-9/11 Levels



Which do you think is a greater threat to airline safety: terrorist attacks or poor airline maintenance?

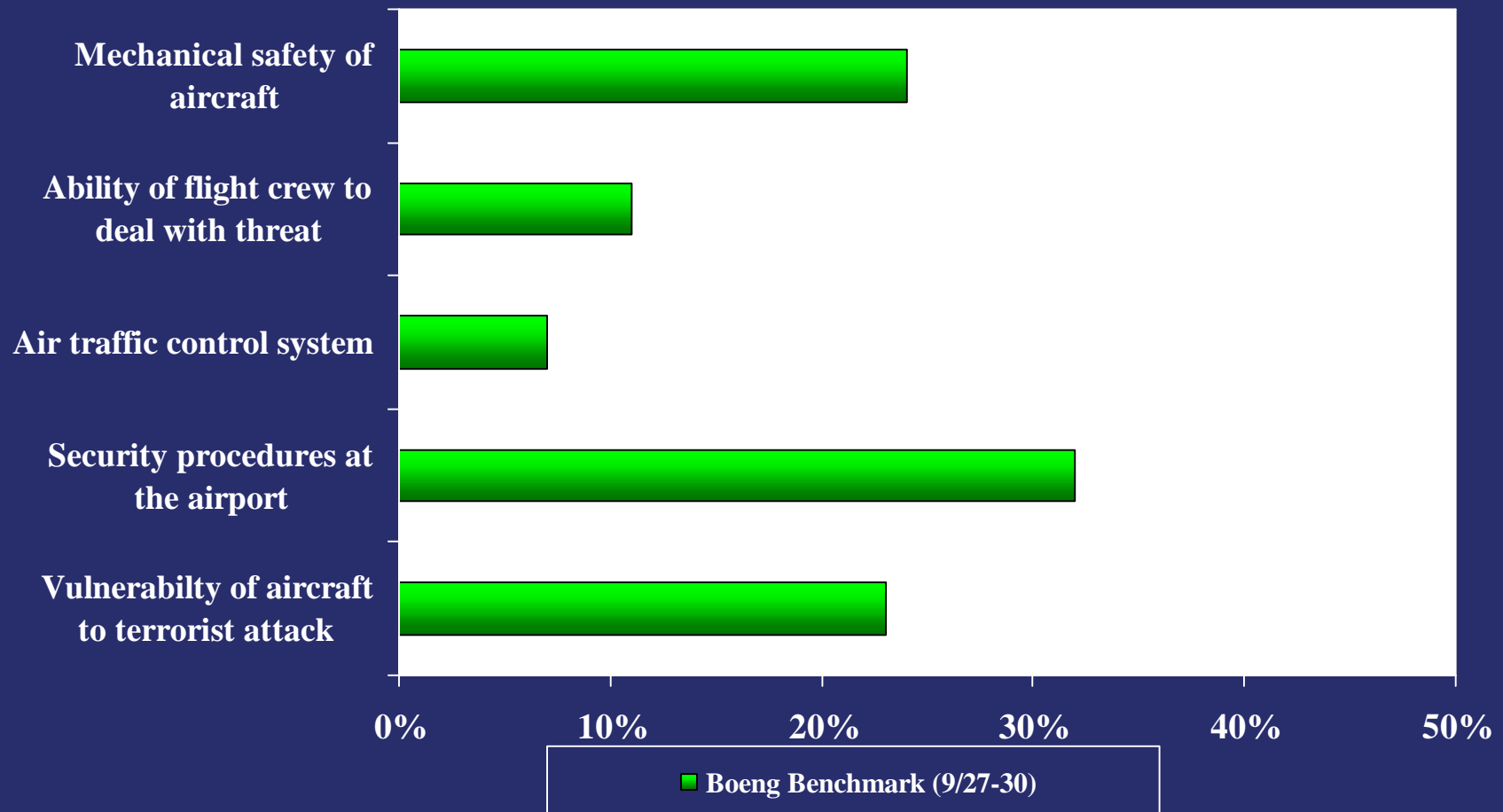


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November A Quorum --2001
N=1,001 Adults Nationwide

After 9/11 Americans Most Concerned about Airport and Aircraft Security

Which of the following five safety concerns worry you the most?



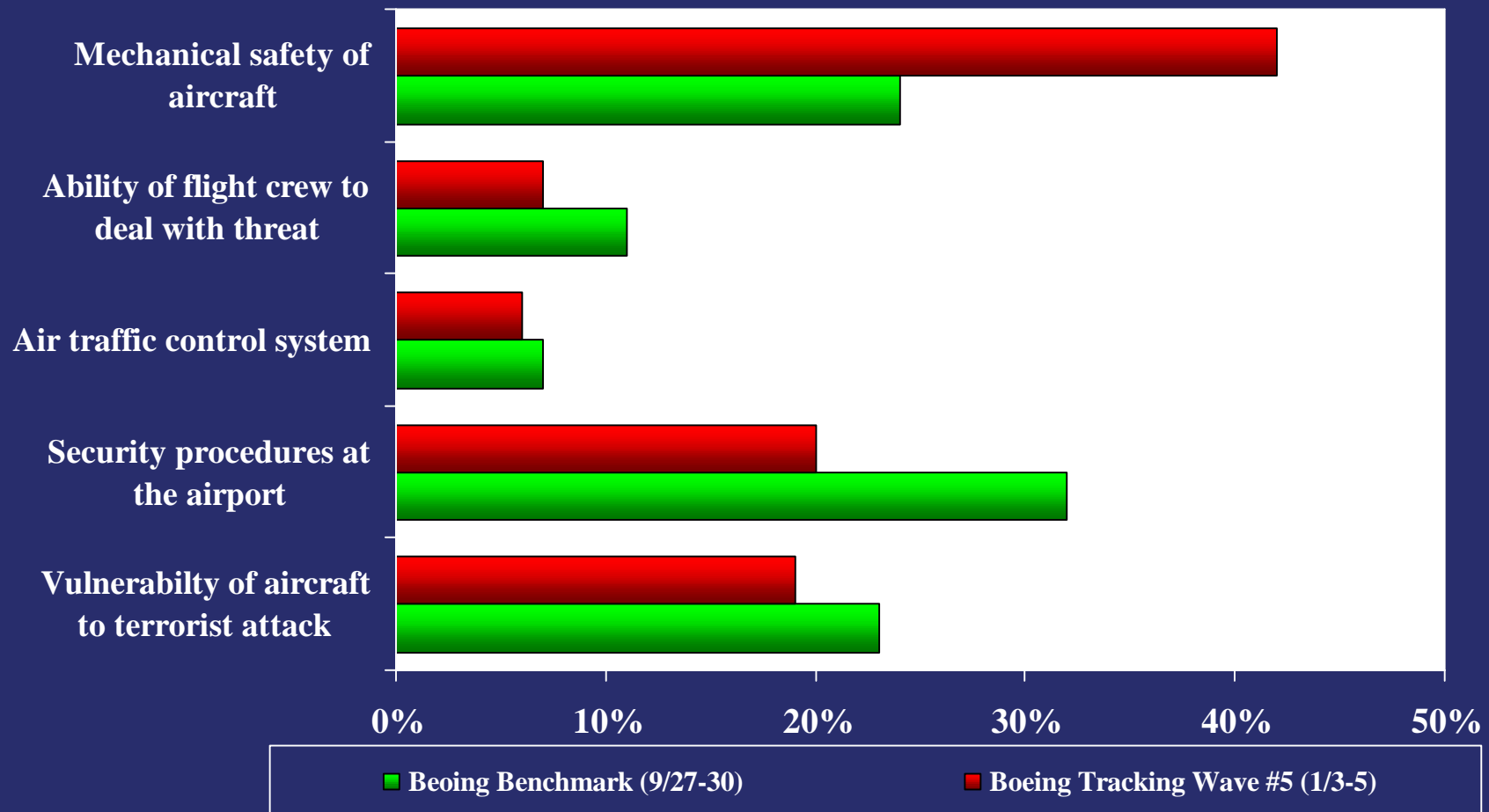
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Now Americans Much More Concerned About Mechanical Safety

Which of the following five safety concerns worry you the most?



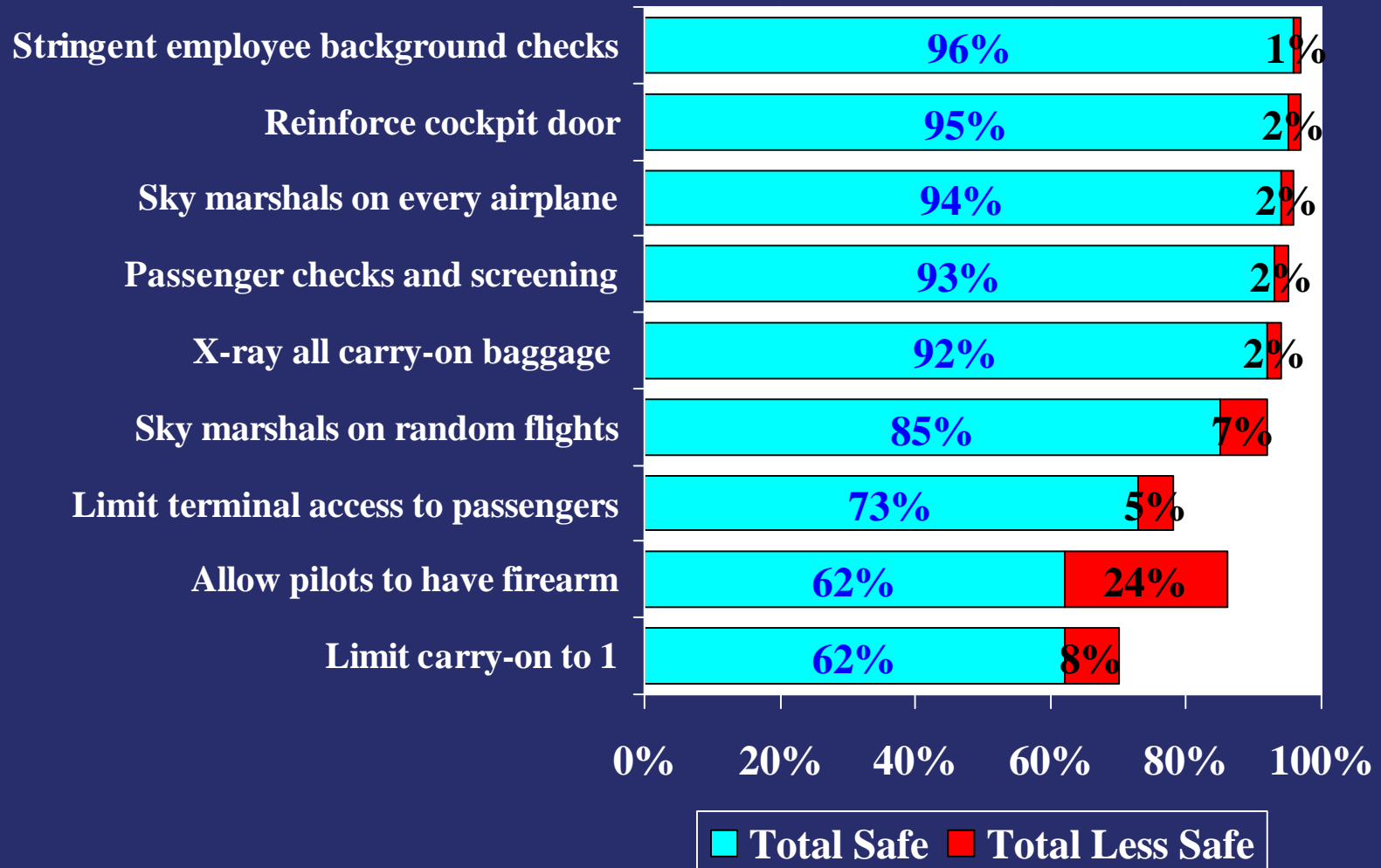
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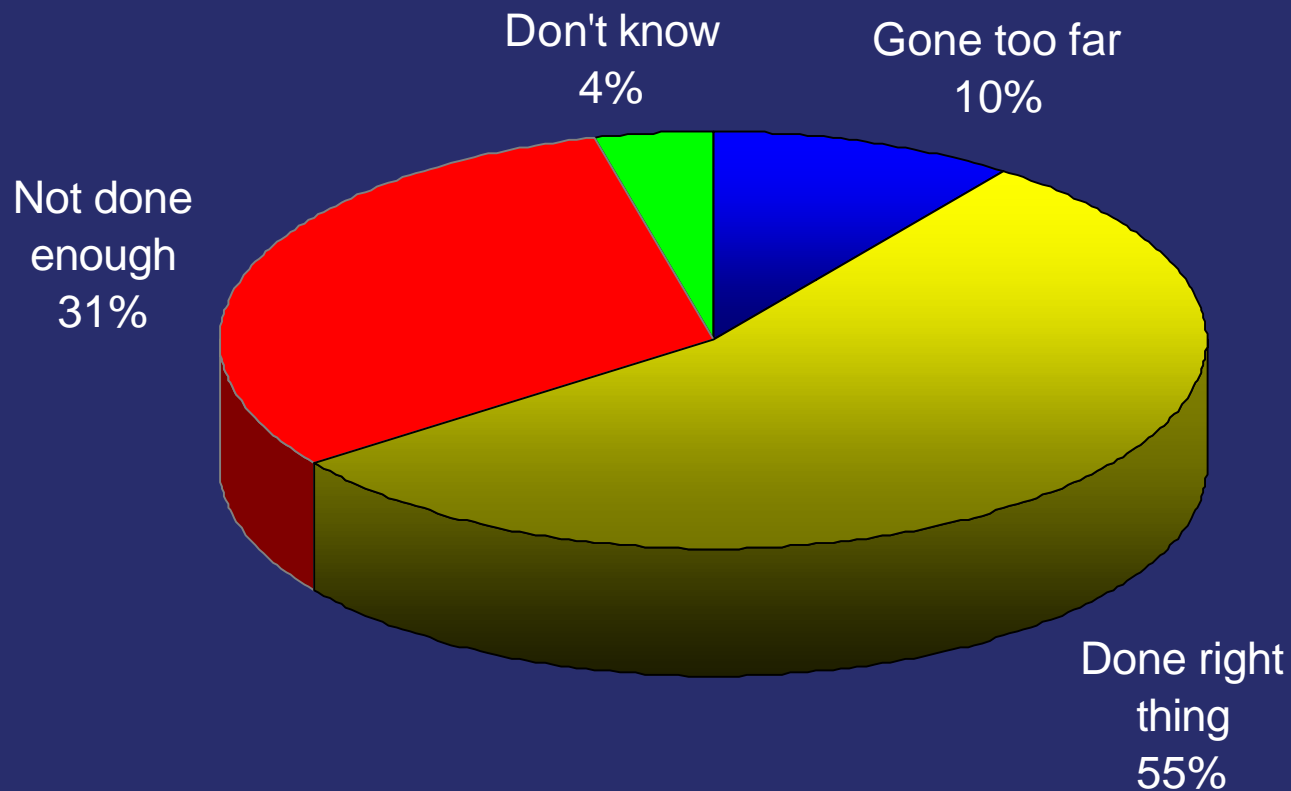


Airline Security Measures

Now I'm going to read you several statements. Some of them describe different airline security measures. For each one, please tell me whether the statement makes you feel MORE SAFE, LESS safe, or makes you feel NEITHER more or LESS safe about flying on commercial airlines?



Airlines Have Done All Right, But Could Do More

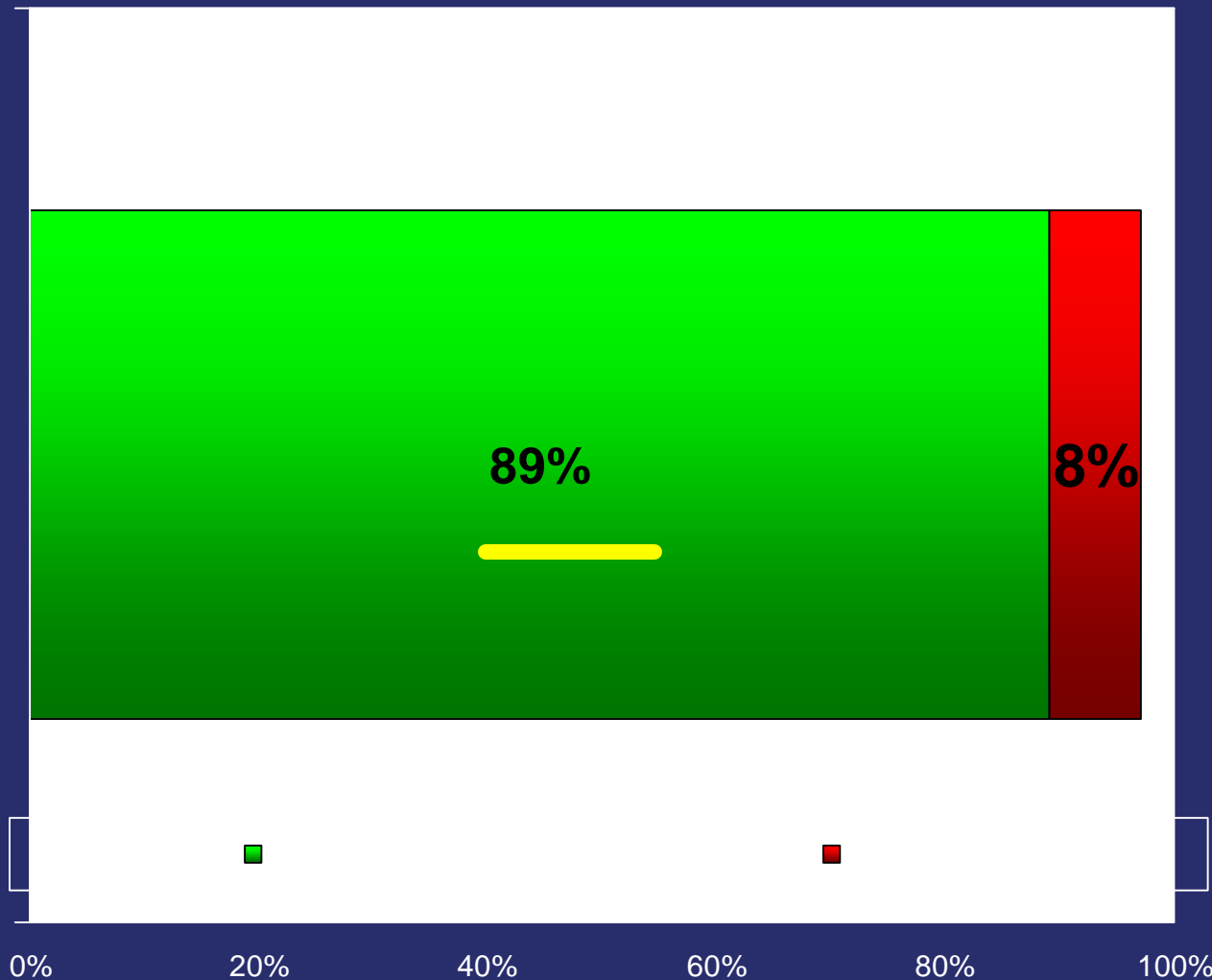


To improve security, the airlines have made a number of changes in the past few months, such as not giving passengers metal knives with their meals, or requiring people to remain in their seats during flight. Do you think the airlines have gone too far with these measures, have the airlines done the right thing, or have the airlines still not done enough?



Public Willingness to Undergo More Intrusive Bag Checks and Passenger Searches

CBS News Poll
(February 2002)



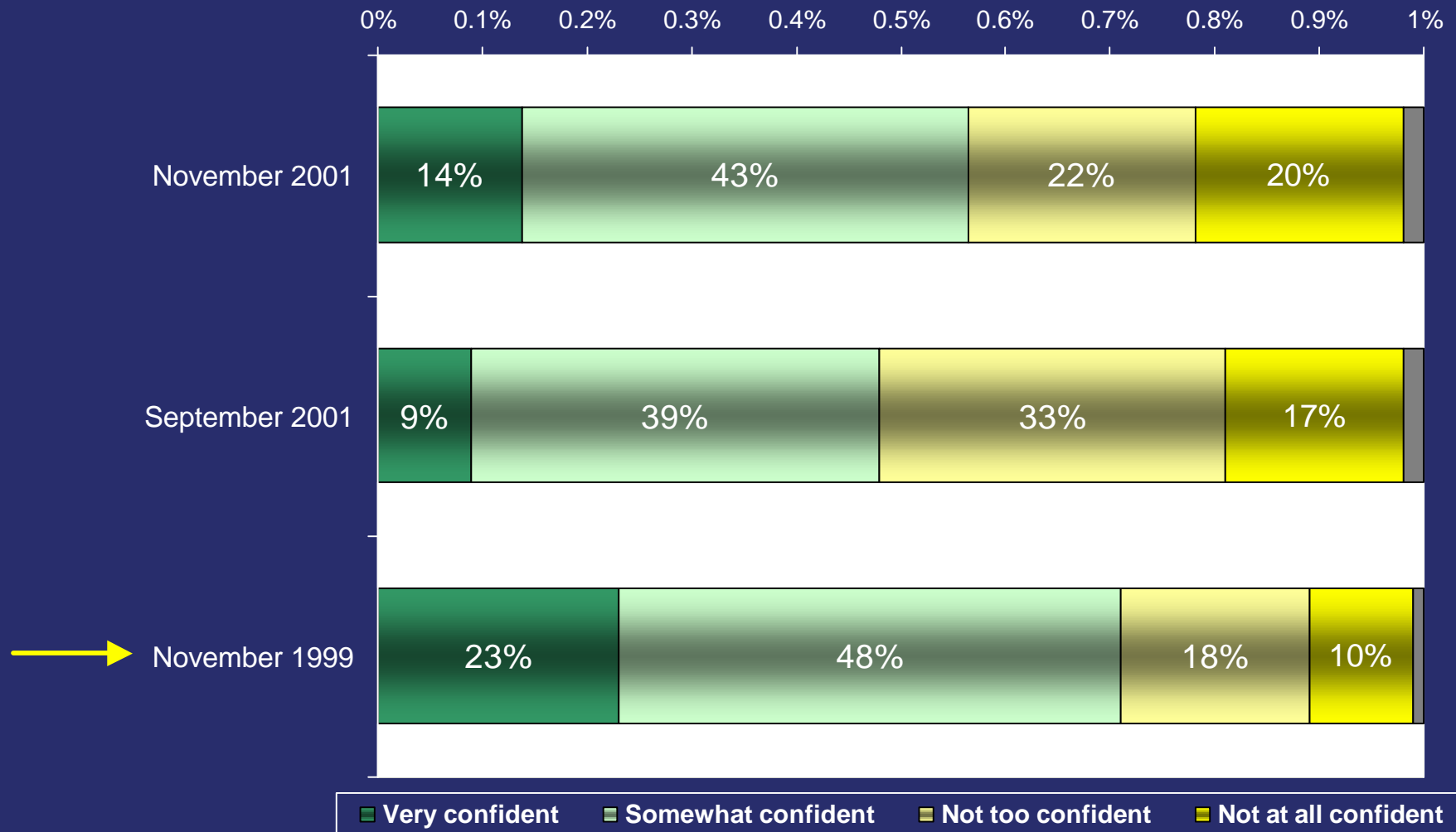
Would you be willing to experience longer and more intrusive bag checks and passenger searches when flying in order to improve airport and airline security



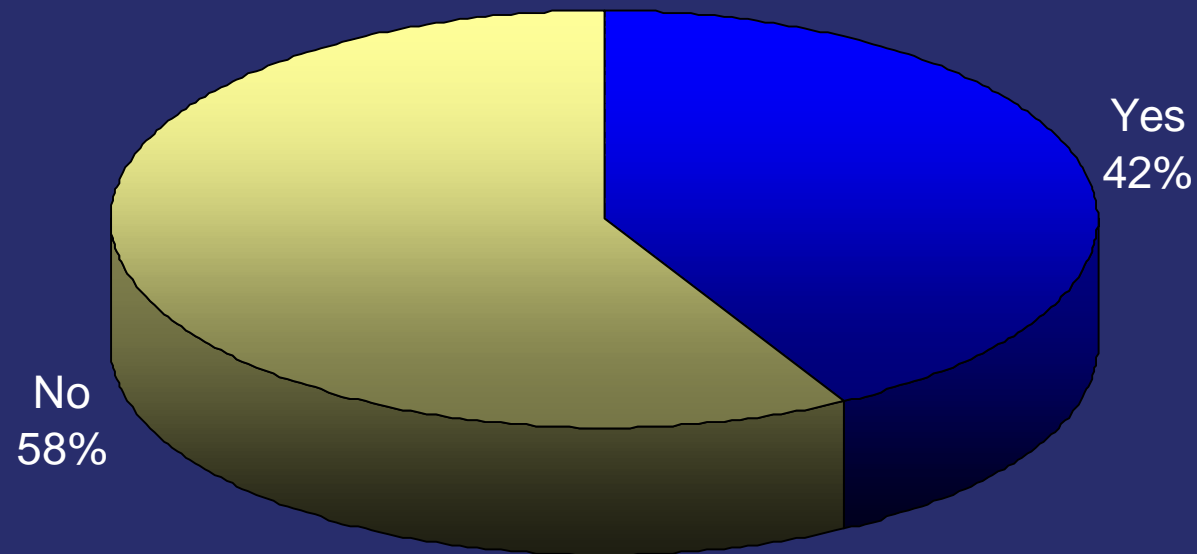
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General Public Confidence in Airport Security

When you fly on commercial airlines, how confident are you that airport security will prevent terrorists from bringing bombs or weapons on the plane?



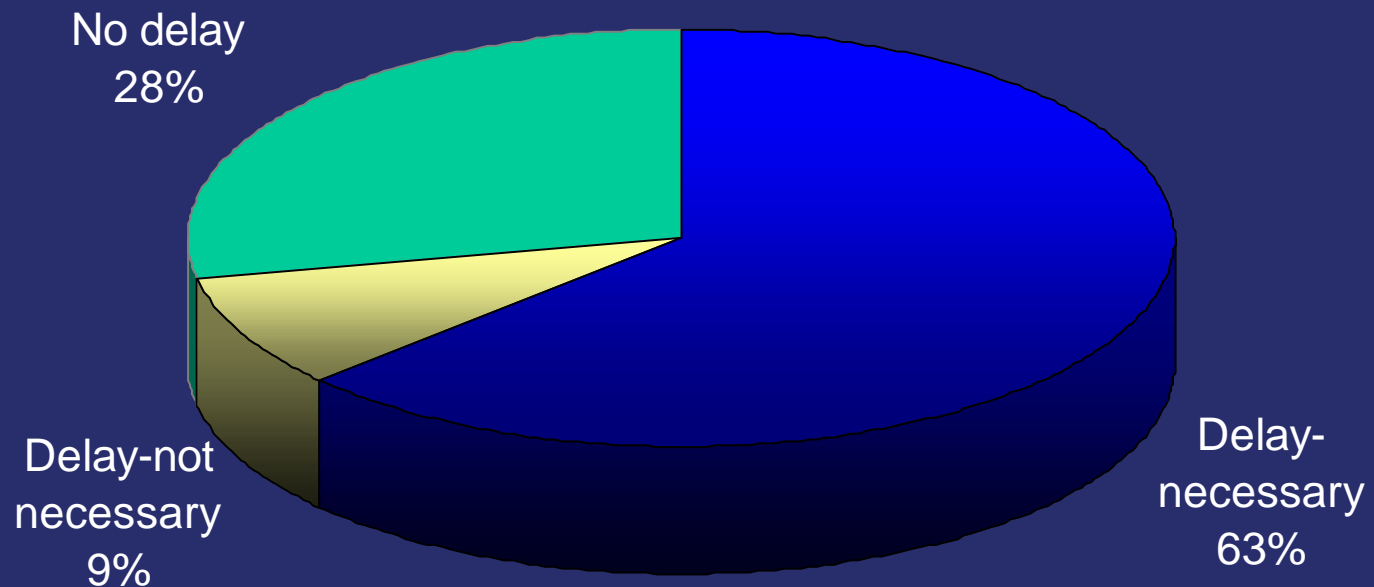
Many travelers have been stopped for a random search of baggage



Have you personally been stopped or in any way singled out for a random search of your checked or carried-on baggage?



Most travelers have been delayed by security checks and believe it is necessary

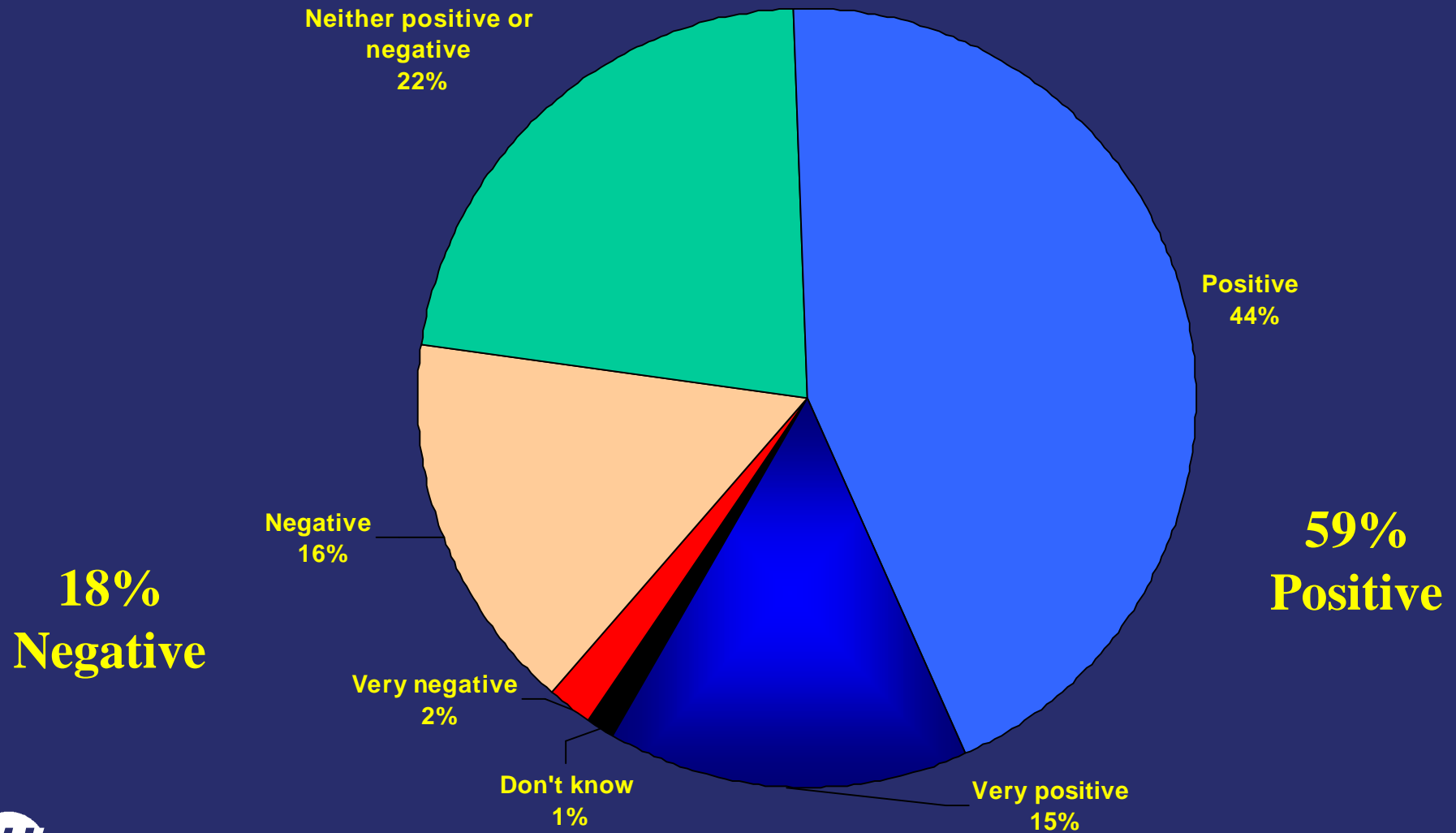


Did you experience any extended wait time or delay at the airport (in the past two months) due to security checks during your recent air travel? IF YES: Did you think the extra wait time or delay was necessary in order to improve air travel safety or did you think the delay was not necessary?



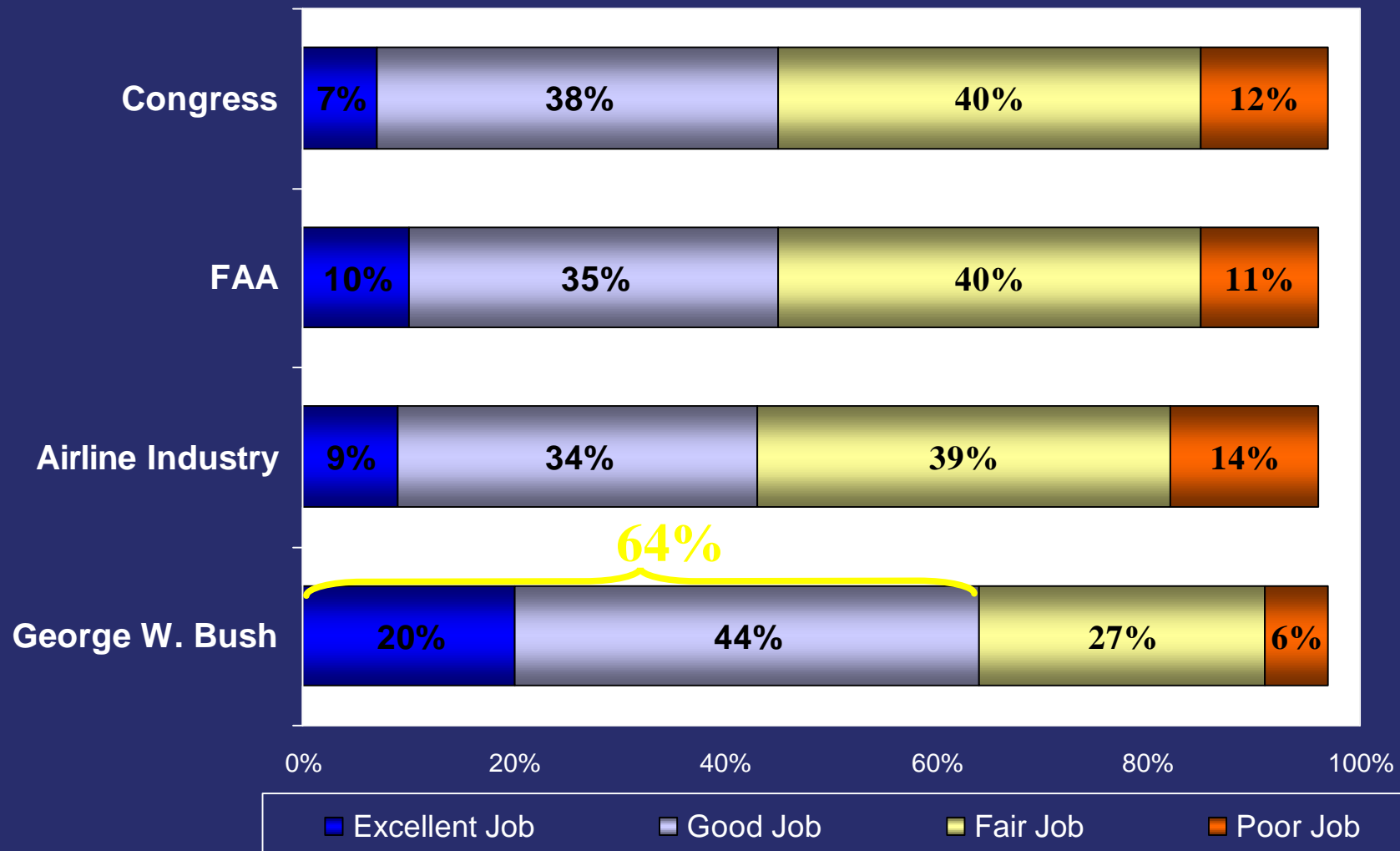
Most adults have positive images of Airport Security Personnel

Do you have a positive or negative image of airport security personnel?



Rating Institutions -- Air Travel Safety

Do you think that INSERT NAME is doing a [READ CHOICES] when it comes to insuring air travel safety and helping people feel comfortable about flying as much as they used to?

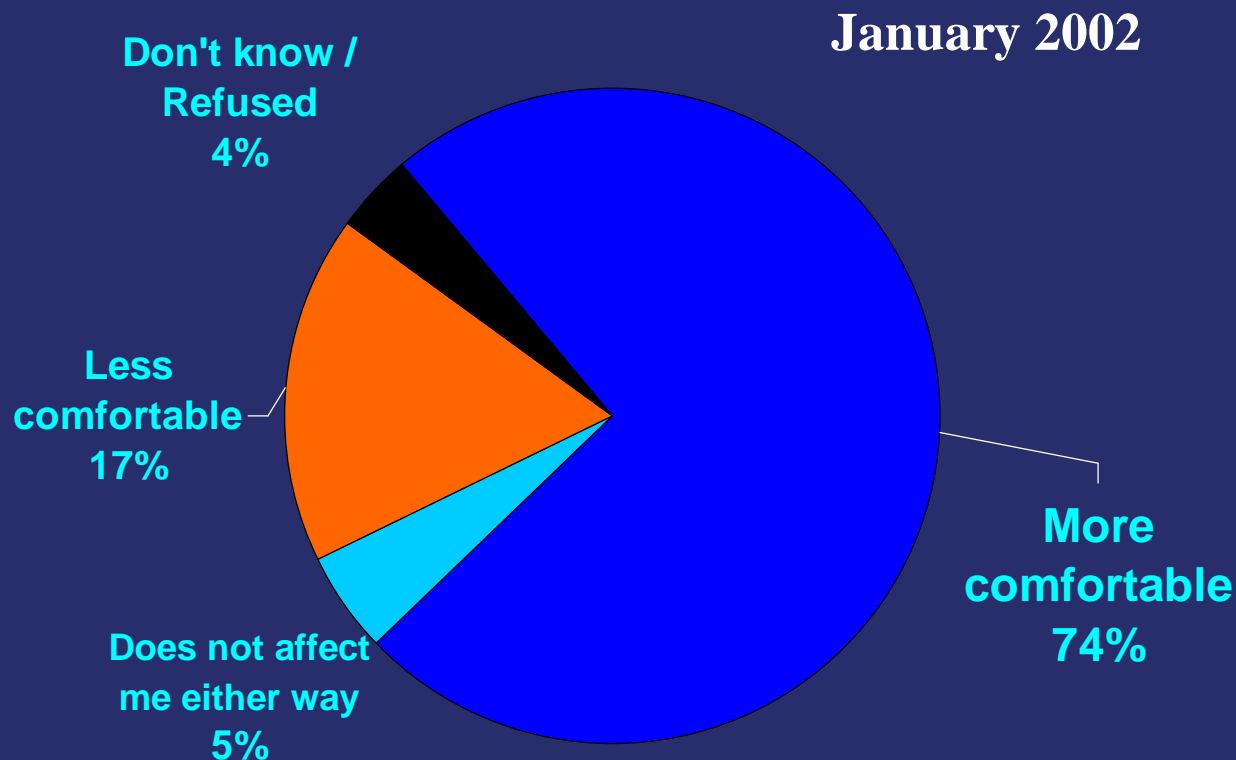


Does Talking About Airline Safety Make People Feel Safer or Make Them More Concerned?

When it comes to hearing about all the things the airline industry has done to make air travel safer...

Some people feel MORE comfortable about flying the MORE they hear about these changes because it makes them feel that airline safety is improving

Other people feel LESS comfortable with flying the MORE they hear about these changes because it reminds them about past airline safety problems.



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