



Global @dvisor

Global Outlook on Terrorism in 2011 and Airport Security

Citizens and Recent Commercial Air Travelers in 24 Countries
Express Their Sentiments



A Global @dvisory – March 2011
Terrorism and Airport Security

Methodology

- These are the findings of the Global @dvisor Wave 16 (G@16), an Ipsos survey conducted between December 10th and December 20th.
- The survey instrument is conducted monthly in 24 countries around the world via the Ipsos Online Panel system. The countries reporting herein are Argentina, Australia, Belgium, Brazil, Canada, China, France, Great Britain, Germany, Hungary, India, Indonesia, Italy, Japan, Mexico, Poland, Russia, Saudi Arabia, South Africa, South Korea, Spain, Sweden, Turkey and the United States of America.
- For the results of the survey presented herein, an international sample of 18,676 adults aged 18-64 in the US and Canada, and age 16-64 in all other countries, were interviewed. Approximately 1000+ individuals participated on a country by country basis via the Ipsos Online Panel with the exception of Argentina, Belgium, Indonesia, Mexico, Poland, Saudi Arabia, South Africa, South Korea, Sweden and Turkey, where each have a sample approximately 500+. The sub-sample of those who indicate they have flown on a commercial aircraft “during the past three months” is 4,680.
- Weighting was then employed to balance demographics and ensure that the sample's composition reflects that of the adult population according to the most recent country Census data, and to provide results intended to approximate the sample universe. A survey with an unweighted probability sample of this size and a 100% response rate would have an estimated margin of error of +/-3.1 percentage points for a sample of 1,000 and an estimated margin of error of +/- 4.5 percentage points 19 times out of 20 per country of what the results would have been had the entire population of adults in that country had been polled. All sample surveys and polls may be subject to other sources of error, including, but not limited to coverage error, and measurement error.

Analytic Components

- There are three analytic components that make up the findings of this report:
 1. (All) Please indicate if you agree very much, agree somewhat, disagree somewhat or disagree very much with the following statements: There will be more acts of terrorism in 2011 than in 2010.
 2. (All) Please indicate if you have traveled by commercial aircraft over the past three months: Yes/No.
 3. (Passengers on commercial aircraft during the past three months only) Do you think that the security procedures at airports for traveling passengers on commercial flights are:
 - Too invasive OR Not too invasive
 - Too strict and thorough OR Not too strict or thorough enough
 - A hassle but necessary OR A hassle and not really necessary
 - Need to be more strict OR Need to be less strict OR Are just fine as they are
 - Is doing a good job of deterring terrorists/terror threats OR Is really not deterring or catching anyone who wants to carry out an act of terrorism/terror threats

Summary

- Half (51%) of global citizens say they strongly or somewhat agree that there will be more acts of terrorism in 2011 than in 2010.
- A strong majority (84%) of recent air travelers across the 24 countries say security procedures at airports for traveling passengers on commercial flights are a hassle but necessary.
- Still, four in ten (40%) recent air travelers say the security procedures at airports for traveling passengers on commercial flights are really not deterring or catching anyone who wants to carry out an act of terrorism.

Key Findings: Citizens in 24 Countries...

- One half (51%) of global citizens anticipate that there will be “more acts of terrorism in 2011 than in 2010” (12% very / 39% somewhat).
- Citizens of Great Britain (66%) are *most likely to believe* more terrorism will occur in 2011, followed by those living in Turkey (65%), India (64%), Mexico (61%), Belgium (60%) and Germany (60%).
 - Citizens of India (24%), Mexico (23%), Turkey (18%) and Poland (17%) are most likely to say they “agree *very much*” with this statement.
- Those citizens *least likely to believe there will be more terrorism in 2011 compared to 2010* are residents of Saudi Arabia (27%) followed by those in Russia (33%), Indonesia (34%), Spain (41%) and Brazil (41%).
- Europeans (54%) are most likely to anticipate more terrorism in 2011 but citizens of Latin America are most likely to feel strongest in sentiment: 15% say they “agree *very much*” compared with the global average of 12%.

Key Findings: Those Who Have Flown on a Commercial Aircraft in the Past Three Months...

- One third (32%) of recent commercial air travelers think security procedures at airports for traveling passengers on commercial flights are *too invasive*, 68% think *not*...travelers from India (53%), Turkey (51%), Spain (45%) and the United States (43%) are most likely to say that the procedures are “too invasive” whereas travelers from Germany (15%), South Africa (16%) and Australia (18%) are least likely to agree that the procedures are “too invasive”.
- Four in 10 (39%) recent commercial air travelers believe security procedures at airports for traveling passengers on commercial flights are *too strict and thorough*, 61% think *not*... travelers from Turkey (69%), China (67%) and Argentina (59%) are *most likely* to say that the security procedures are “too strict and thorough” compared with Germany (18%), Indonesia (19%) and South Africa (20%) who are *least likely* to believe this.

Key Findings: Those Who Have Flown on a Commercial Aircraft in the Past Three Months...

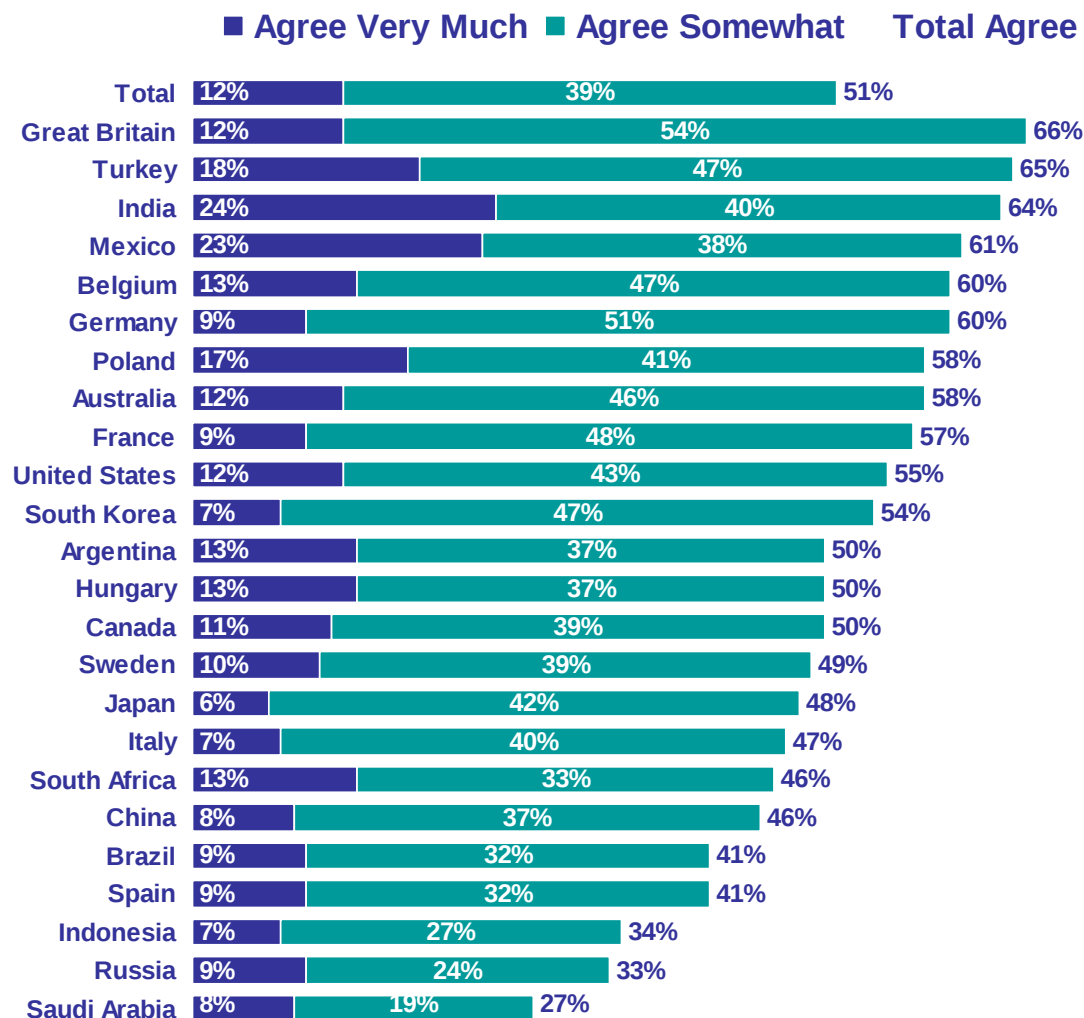
- Despite this, **only 19%** of recent commercial air travelers **think security procedures at airports** for traveling passengers on commercial flights **need to be less strict**, **32% say** security procedures should be **more strict** whereas **half (49%) say they're just fine the way they are...**
- Travelers from Spain (32%), Saudi Arabia (29%), the United States (27%), Russia (26%) and Canada (25%) are **most likely to say security procedures at airports** for traveling passengers on commercial flights **need to be "less strict"** ...
- Travelers from Indonesia (58%) Brazil (57%), India (48%), Italy (45%) and Japan (43%) are **most likely to say security procedures at airports** for traveling passengers on commercial flights need to be **"more strict"** ...
- Travelers **most likely to say security procedures at airports** for traveling passengers on commercial flights are **"just fine as they are"** are from Argentina (72%), South Africa (63%), Australia (61%), Canada (50%) and France (57%).

Key Findings: Those Who Have Flown on a Commercial Aircraft in the Past Three Months...

- Overall, 84% of recent air travelers believe security procedures at airports for traveling passengers on commercial flights are *a hassle but necessary*, while only 16% think it's a hassle and *not really necessary*... travelers *most likely* to say that the security procedures are *a hassle but necessary* are from Argentina (100%), Russia (94%), Hungary (93%), South Africa (93%) and Australia (92%). Travelers *most likely* to say security procedures are a hassle and *not really necessary* are from Saudi Arabia (37%), Turkey (34%), the United States (24%) and Sweden (23%).
- A minority (40%) of recent air travelers say security procedures at airports for traveling passengers on commercial flights are really not deterring or catching anyone who wants to carry out an act of terrorism/terror threats, while a majority (60%) say these procedures are *doing a good job* of deterring terrorists/terror threats... those *most likely* to believe security procedures do not really deter terrorists/terror threats are from Germany (72%) and Italy, Hungary, and Brazil each at 63%, and followed by France (57%) and Canada (54%) compared with those from Indonesia (83%), Saudi Arabia (74%), China (72%), Argentina (70%) and India (69%) are *most likely* to say the procedures do a good job of deterring terrorists/terror threats.

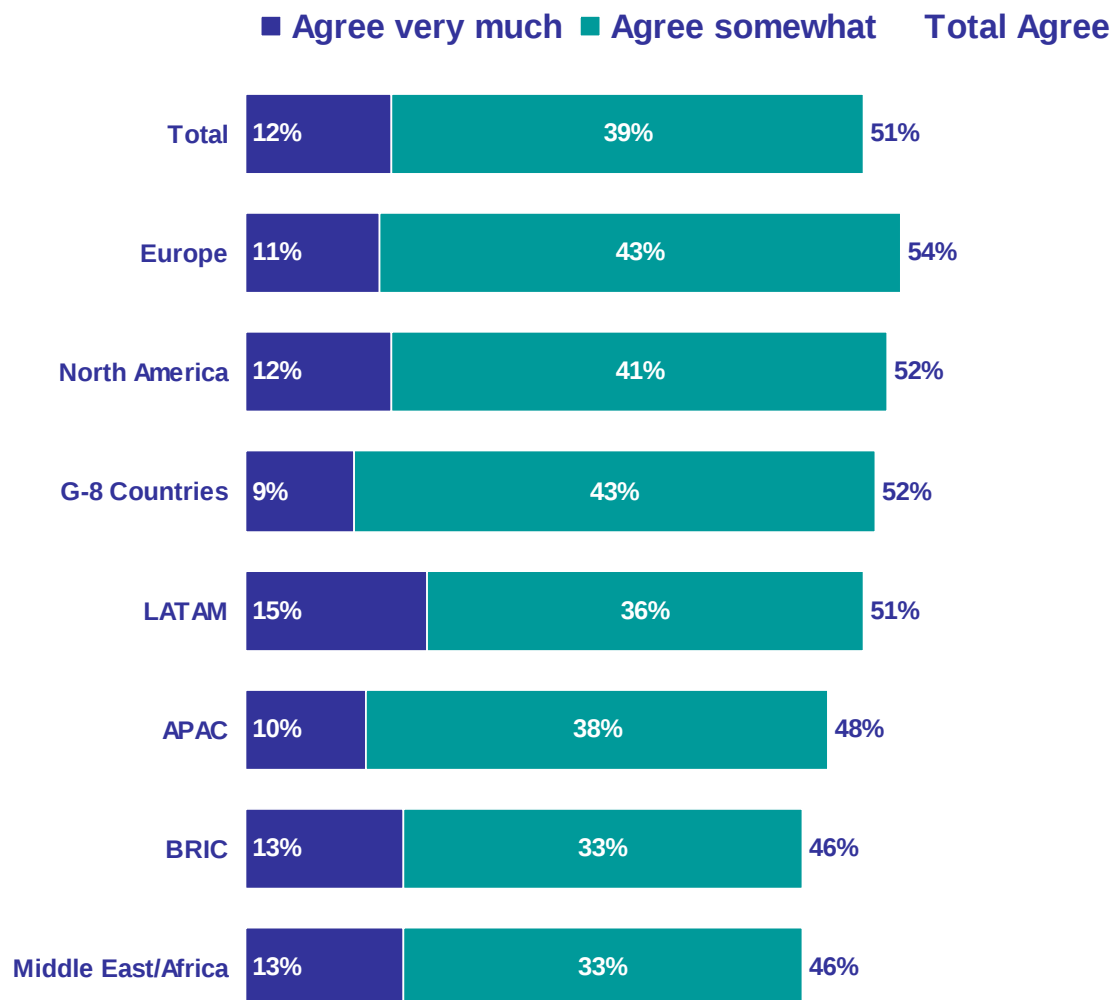
DETAILED FINDINGS: Anticipating Terrorism in 2011

Half (51%) of Global Citizens Anticipate *More Acts of Terrorism* in 2011 than in 2010...



Base: All 18,676 respondents globally in 24 countries Please indicate if you agree very much, agree somewhat, disagree somewhat or disagree very much with the following statement: *There will be more acts of terrorism in 2011 than in 2010*

Those Citizens in Europe (54%) are Most Likely To Believe There will be More Acts of Terrorism in 2011 than in 2010...

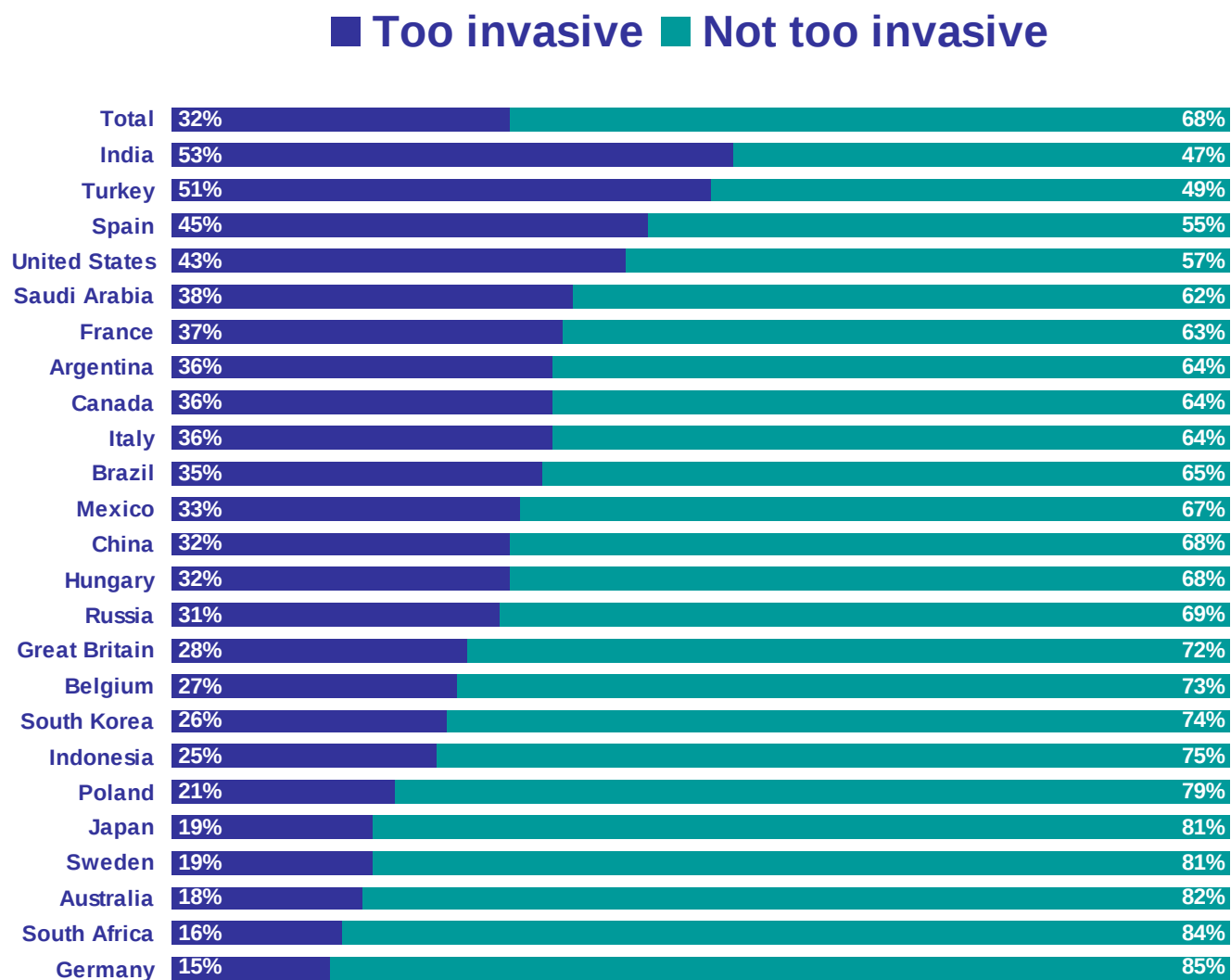


Base: All 18,676 respondents globally in 24 countries Please indicate if you agree very much, agree somewhat, disagree somewhat or disagree very much with the following statement: *There will be more acts of terrorism in 2011 than in 2010*

DETAILED FINDINGS:

Security Procedures At Airports For Traveling Passengers On Commercial Flights

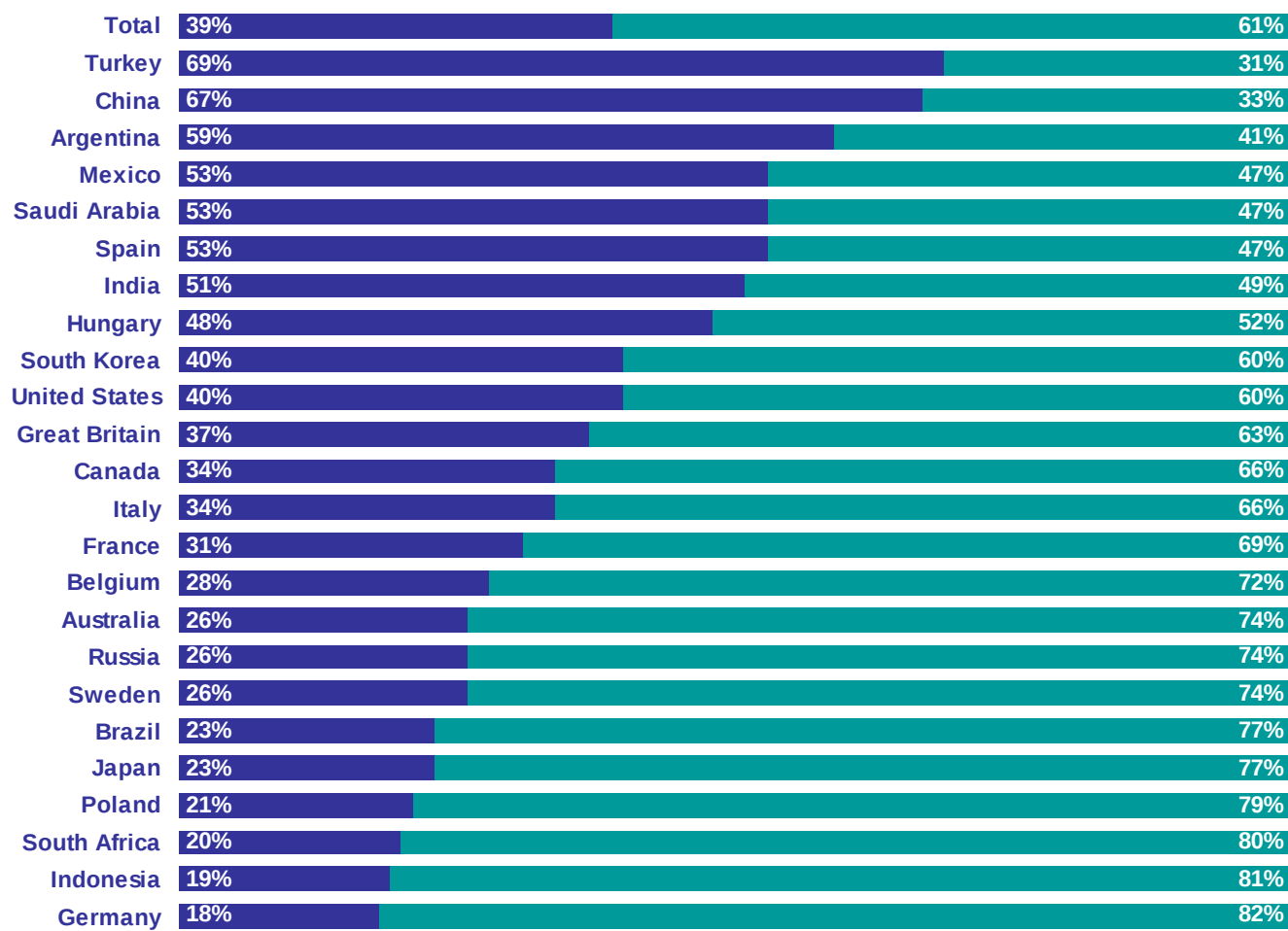
One Third (32%) of Air Travelers Think Security Procedures At Airports are Too Invasive, 68% Not...



Base: Traveled By Plane in Past 3 Months: Do you think that the security procedures at airports for traveling passengers on commercial flights are too invasive or not too invasive?

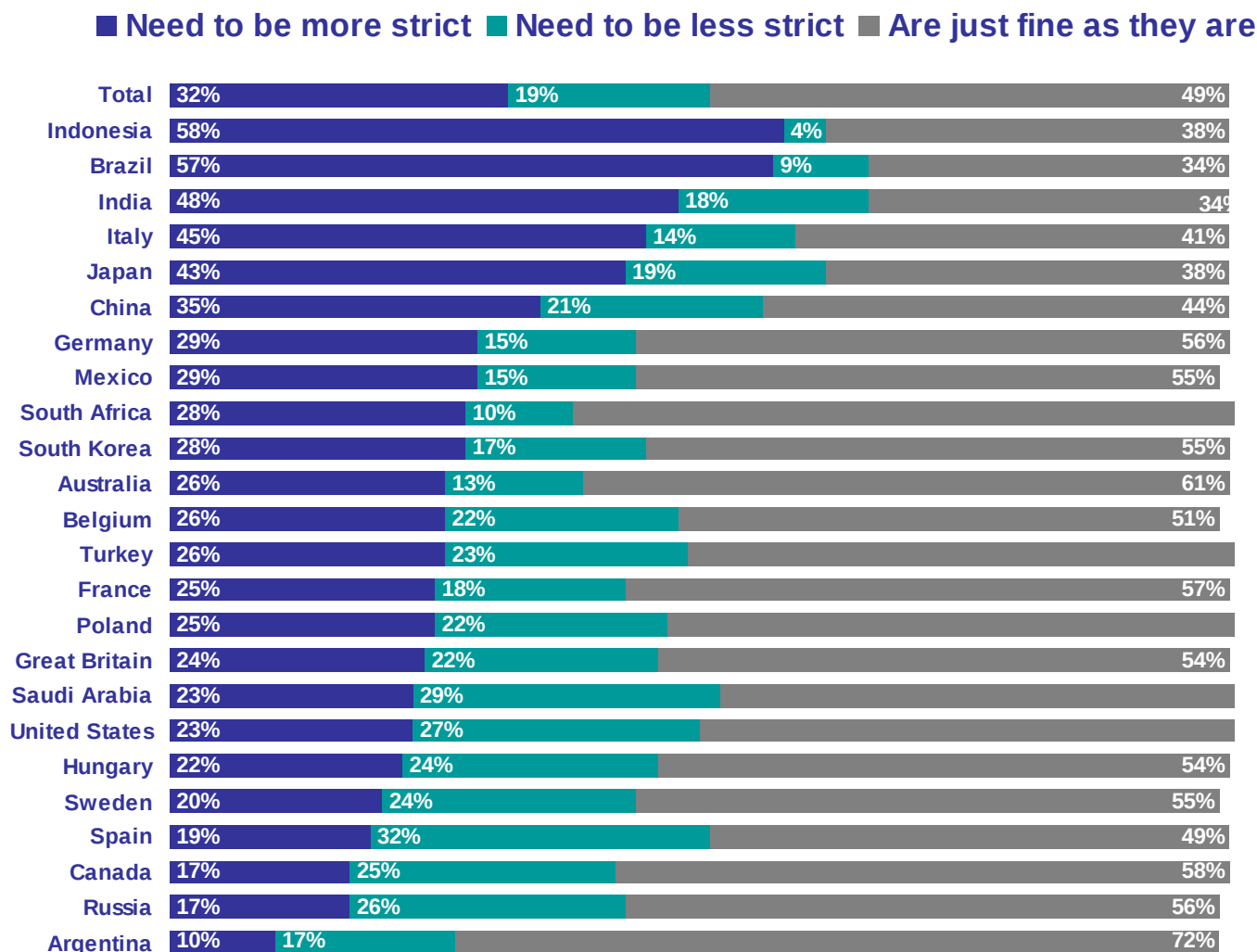
Four In 10 (39%) Air Travelers Believe Security Procedures at Airports are *Too Strict And Thorough*, 61% think *Not...*

■ Too strict and thorough ■ Not too strict or thorough enough



Base: Traveled By Plane in Past 3 Months: Do you think that the security procedures at airports for traveling passengers on commercial flights are too strict and thorough or not too strict and thorough?

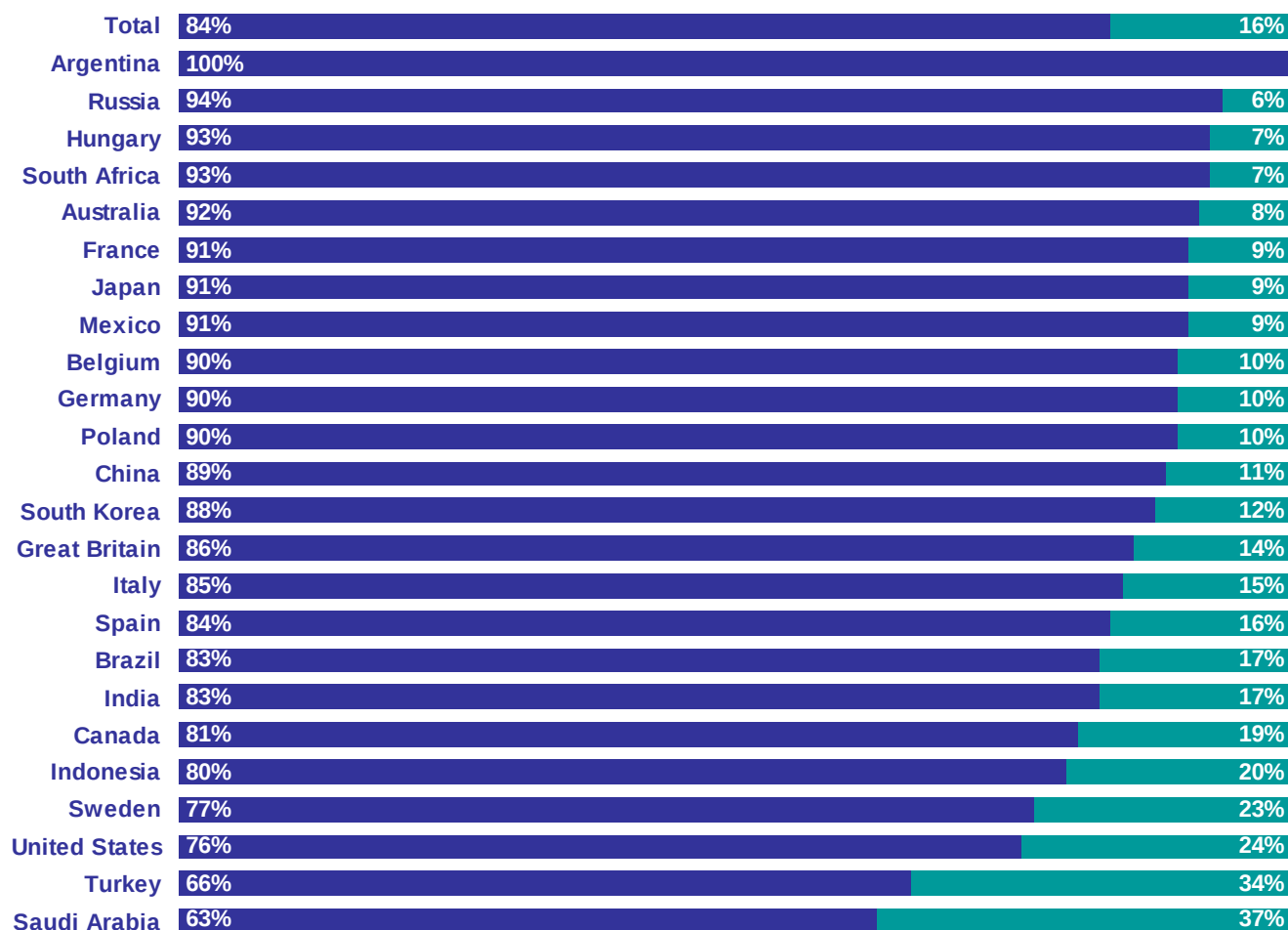
Only 19% of Recent Air Travelers Think Security Procedures at Airports Need to be *Less Strict*, 32% Say *More Strict* and Half (49%) Say They're *Just Fine The Way They Are...*



Base: Traveled By Plane in Past 3 Months: Do you think that the security procedures at airports for traveling passengers on commercial flights need to be more strict, less strict or are just fine as they are?

84% of Air Travelers Believe Security Procedures at Airports are a *Hassle But Necessary*, 16% think a *Hassle and Not Really Necessary*...

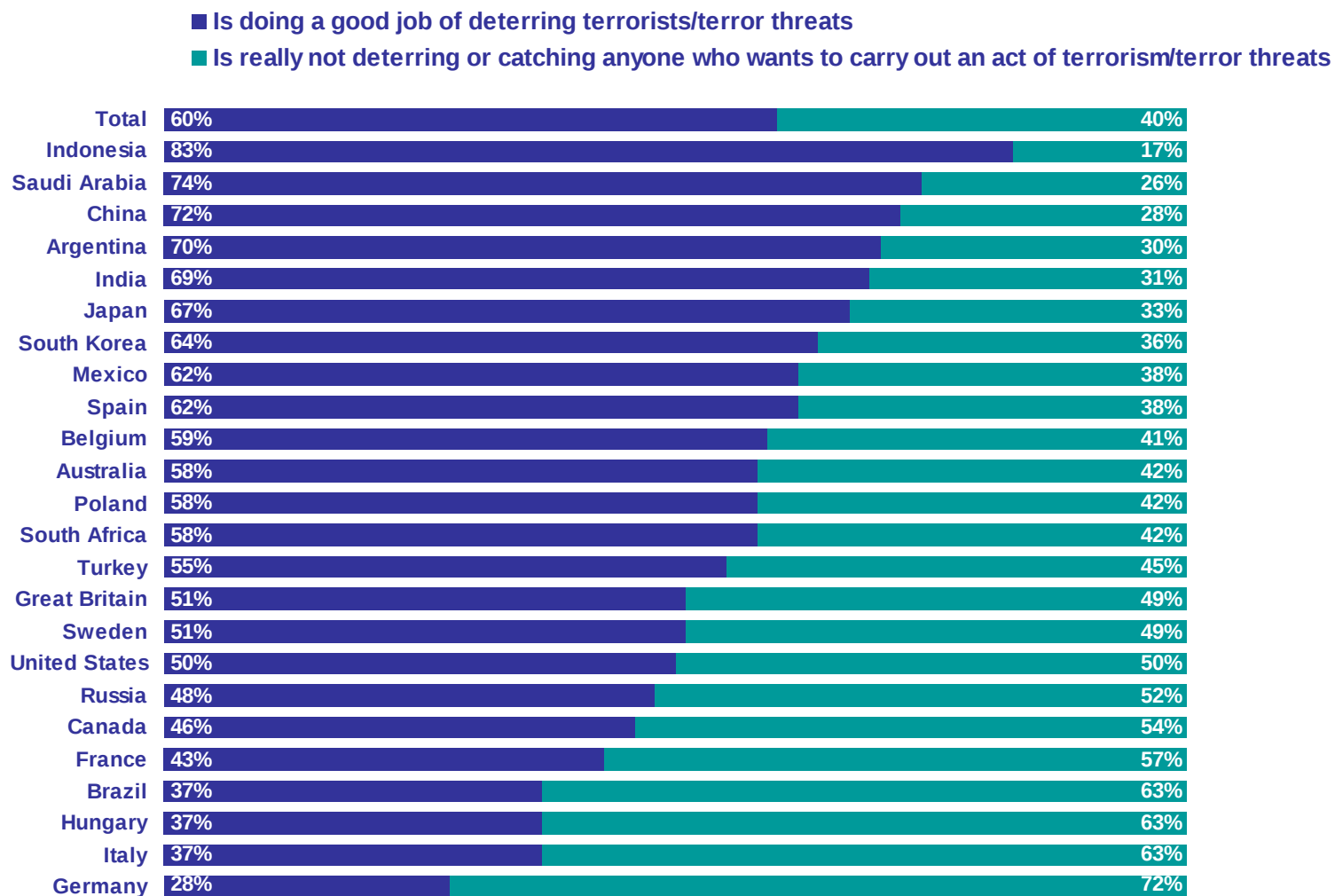
■ A hassle but necessary ■ A hassle and not really necessary



Base: Traveled By Plane in Past 3 Months: Do you think that the security procedures at airports for traveling passengers on commercial flights are a hassle and necessary or a hassle and not really necessary?



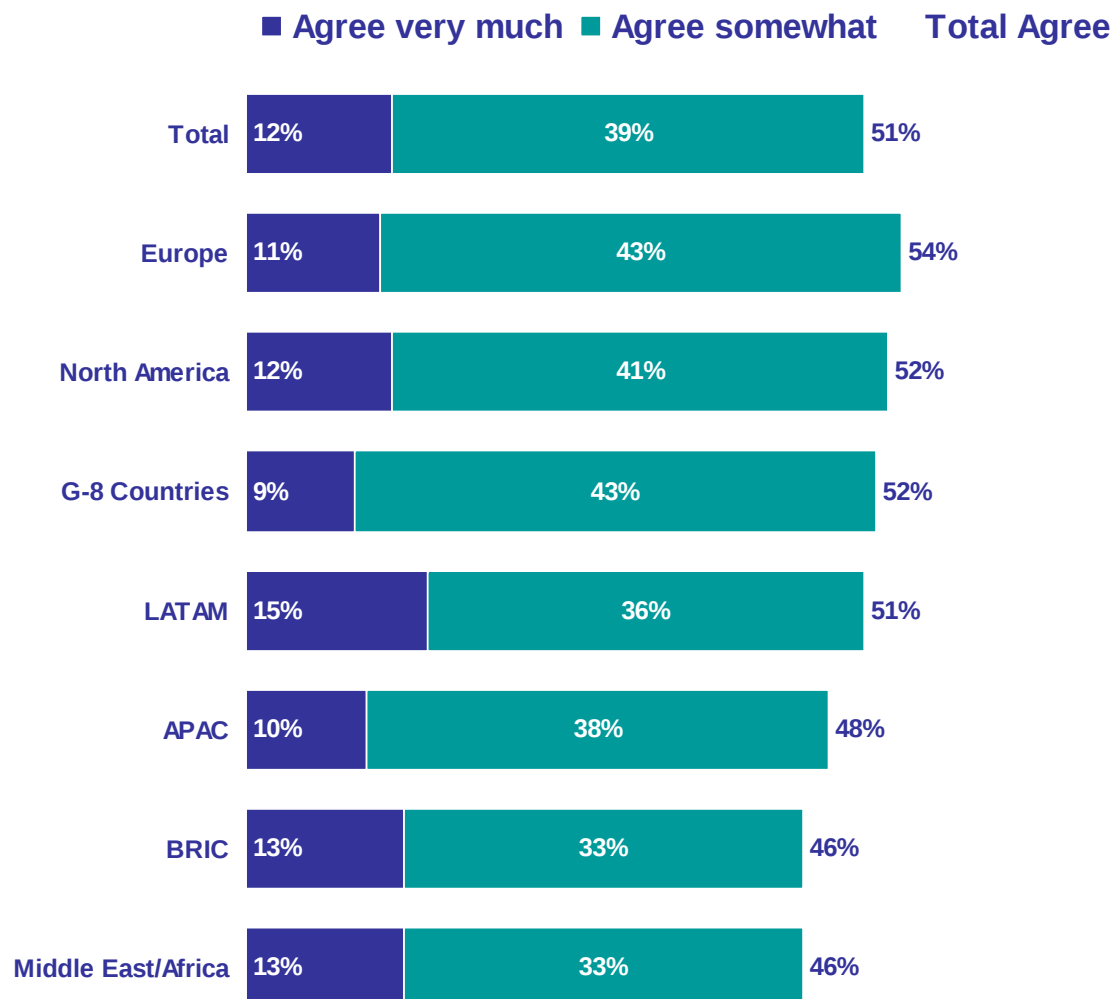
60% of Recent Air Travelers Think Security Procedures at Airports are Doing a Good Job of Deterring Terrorists/Terror Threats, 40% Say Not...



Base: Traveled By Plane in Past 3 Months: Do you think that the security procedures at airports for traveling passengers on commercial flights is doing a good job of deterring terrorists/terror threats or is really not deterring or catching anyone who wants to carry out an act of terrorism/terror threats ?

Appendix: Regional Breakdown

There will be more acts of terrorism in 2011 than in 2010 - Regions



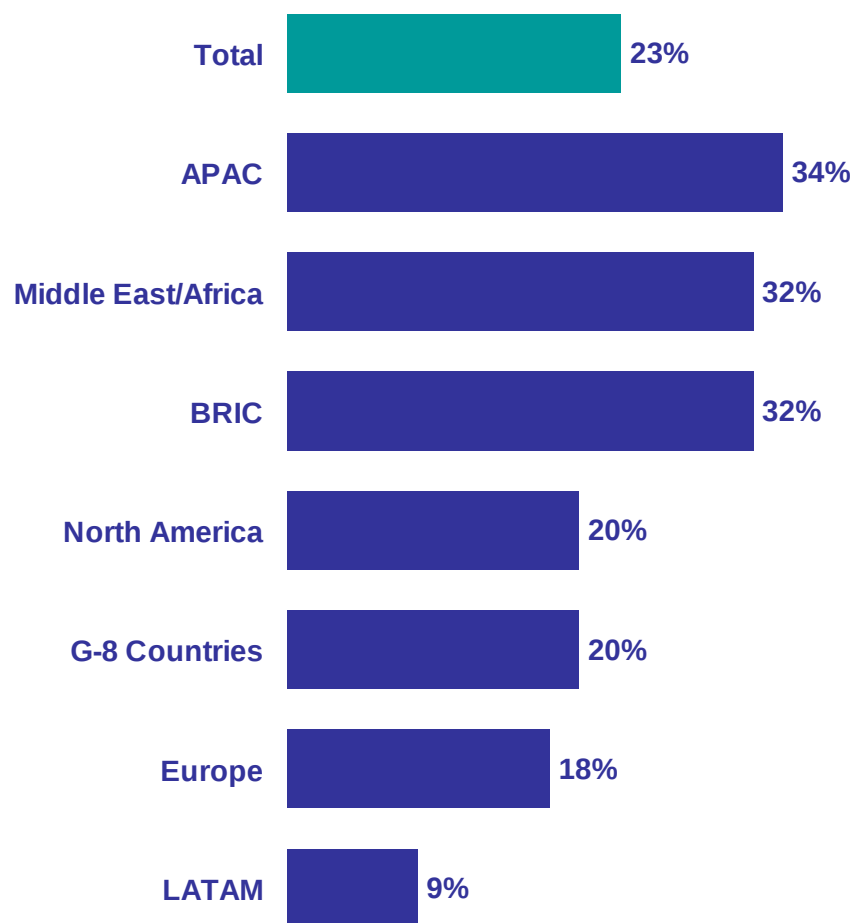
Base: All Respondents

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Please Indicate If You Have Travelled By Commercial Aircraft Over The Past Three Months - Regions

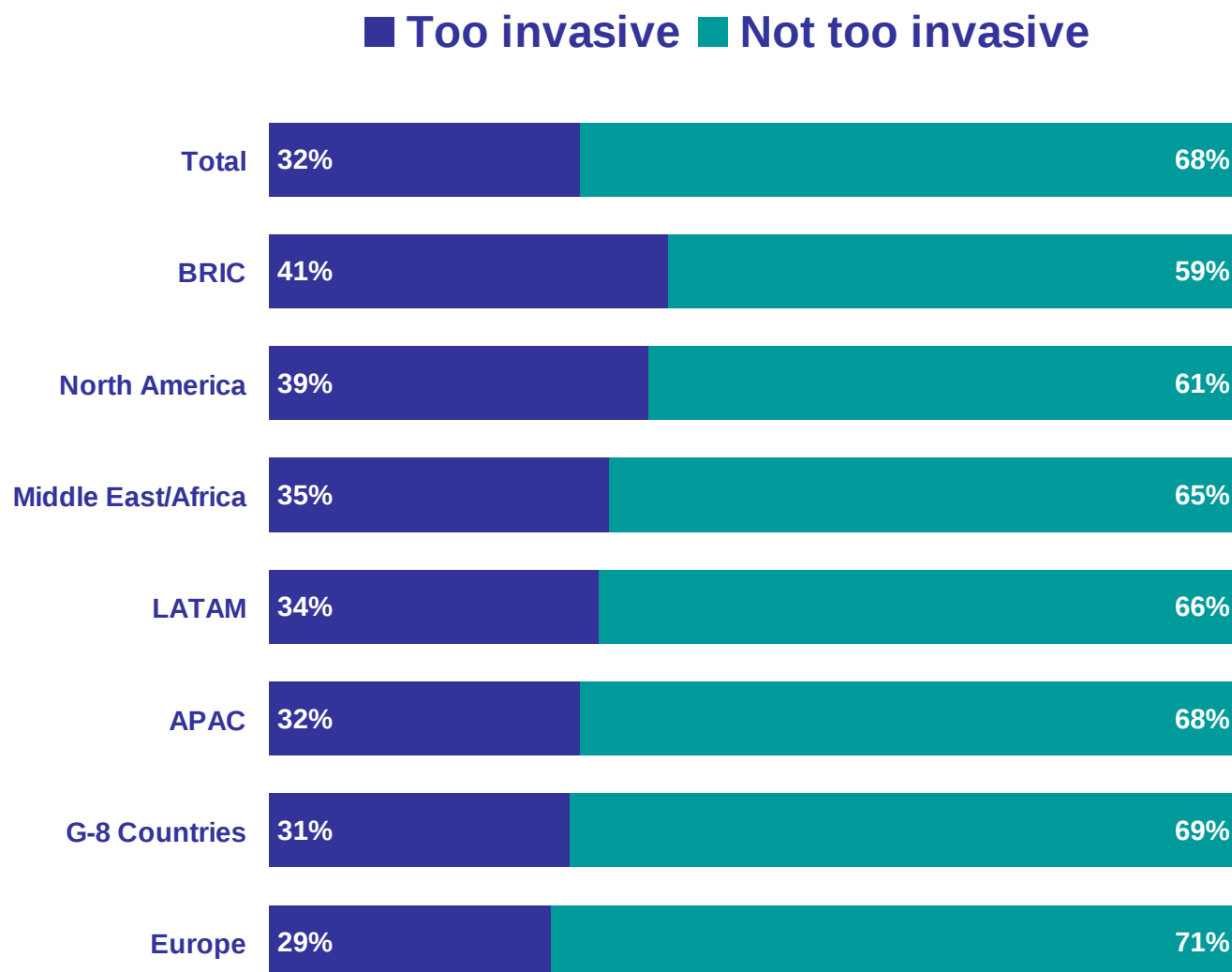
Yes



Base: All Respondents

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Do you think that the security procedures at airports for traveling passengers on commercial flights are - Regions



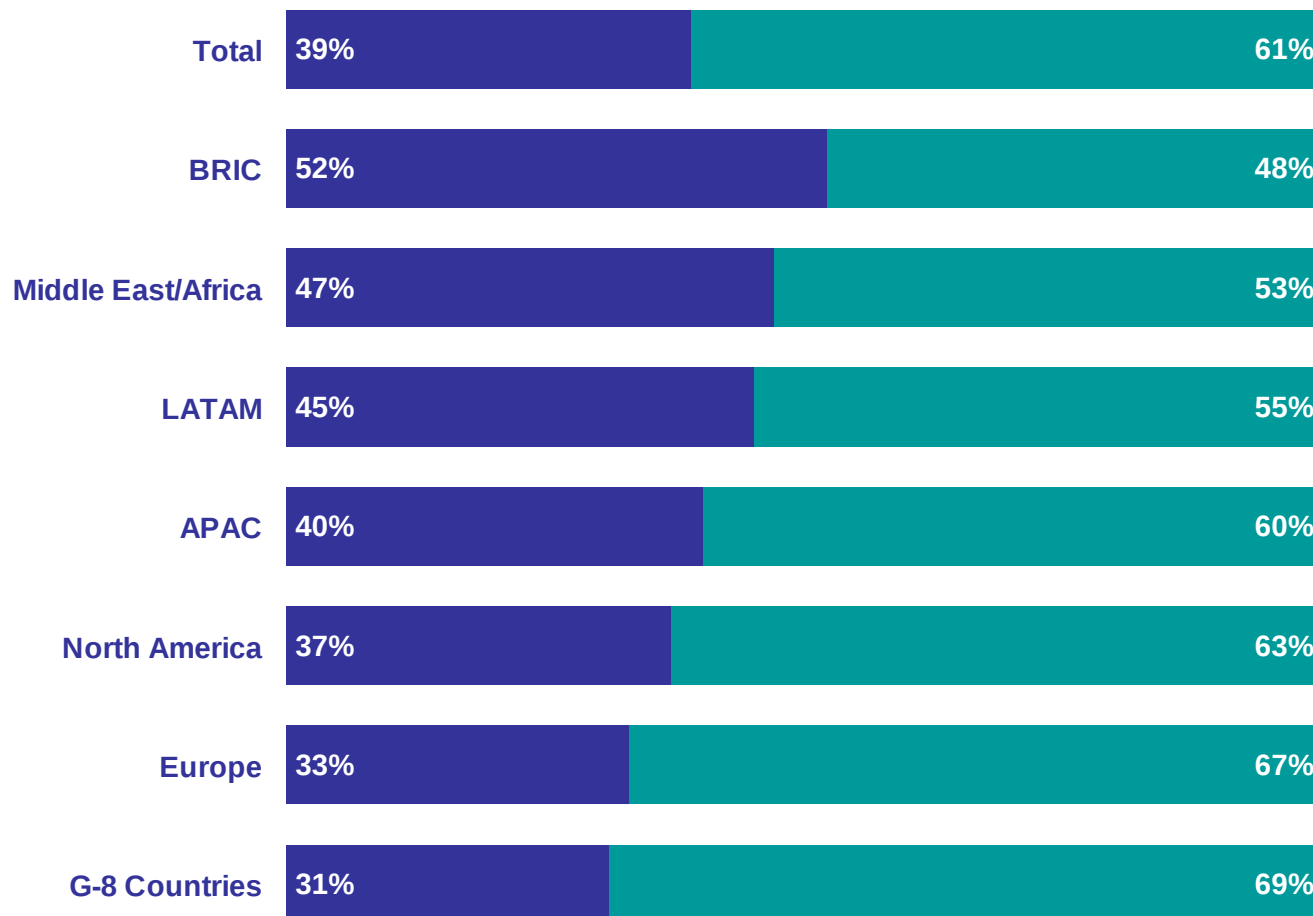
Base: Traveled By Plane In Past 3 Months

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Do you think that the security procedures at airports for traveling passengers on commercial flights are - Regions

■ Too strict and thorough ■ Not too strict or thorough enough

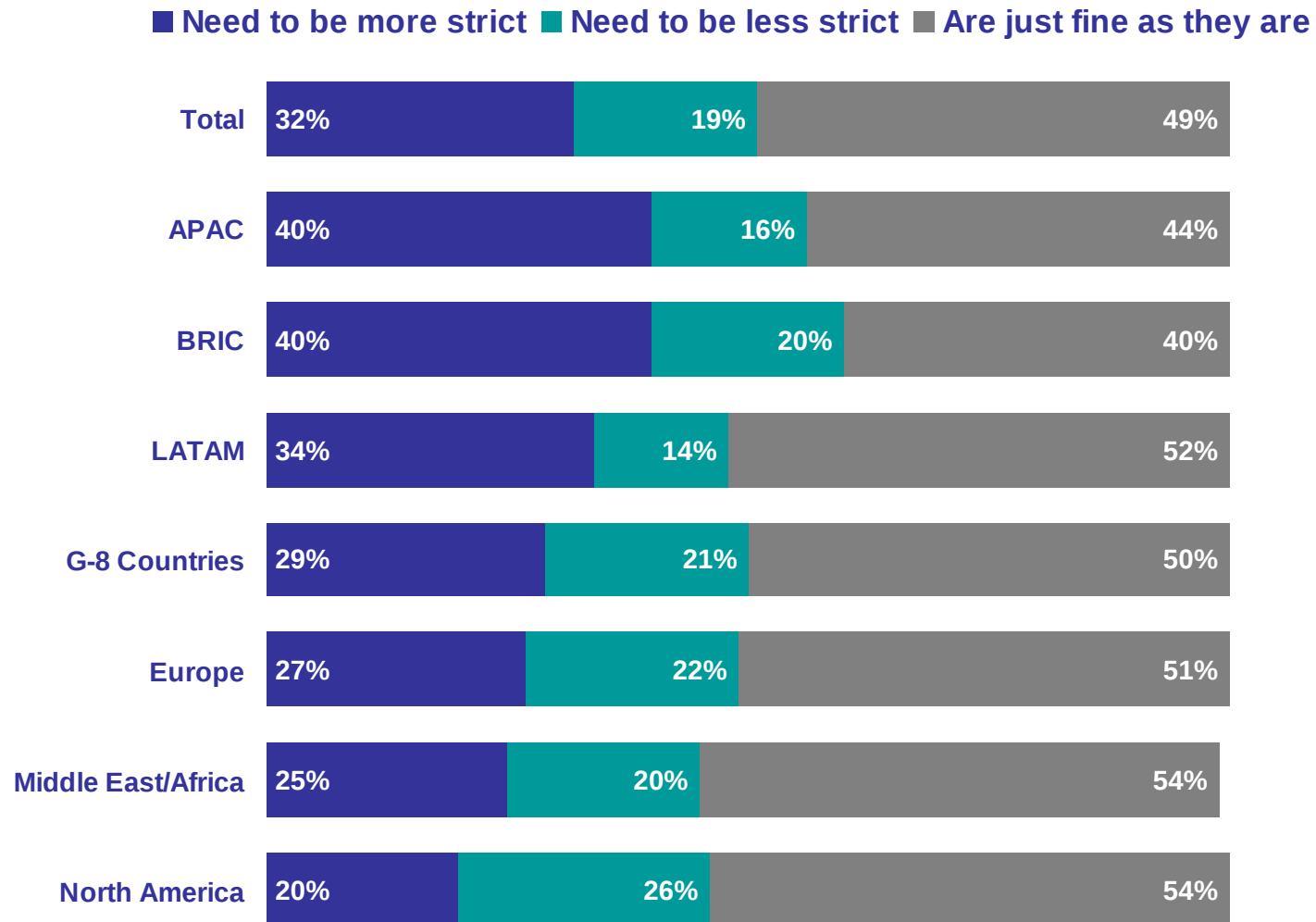


Base: Traveled By Plane In Past 3 Months

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Do you think that the security procedures at airports for traveling passengers on commercial flights are - Regions



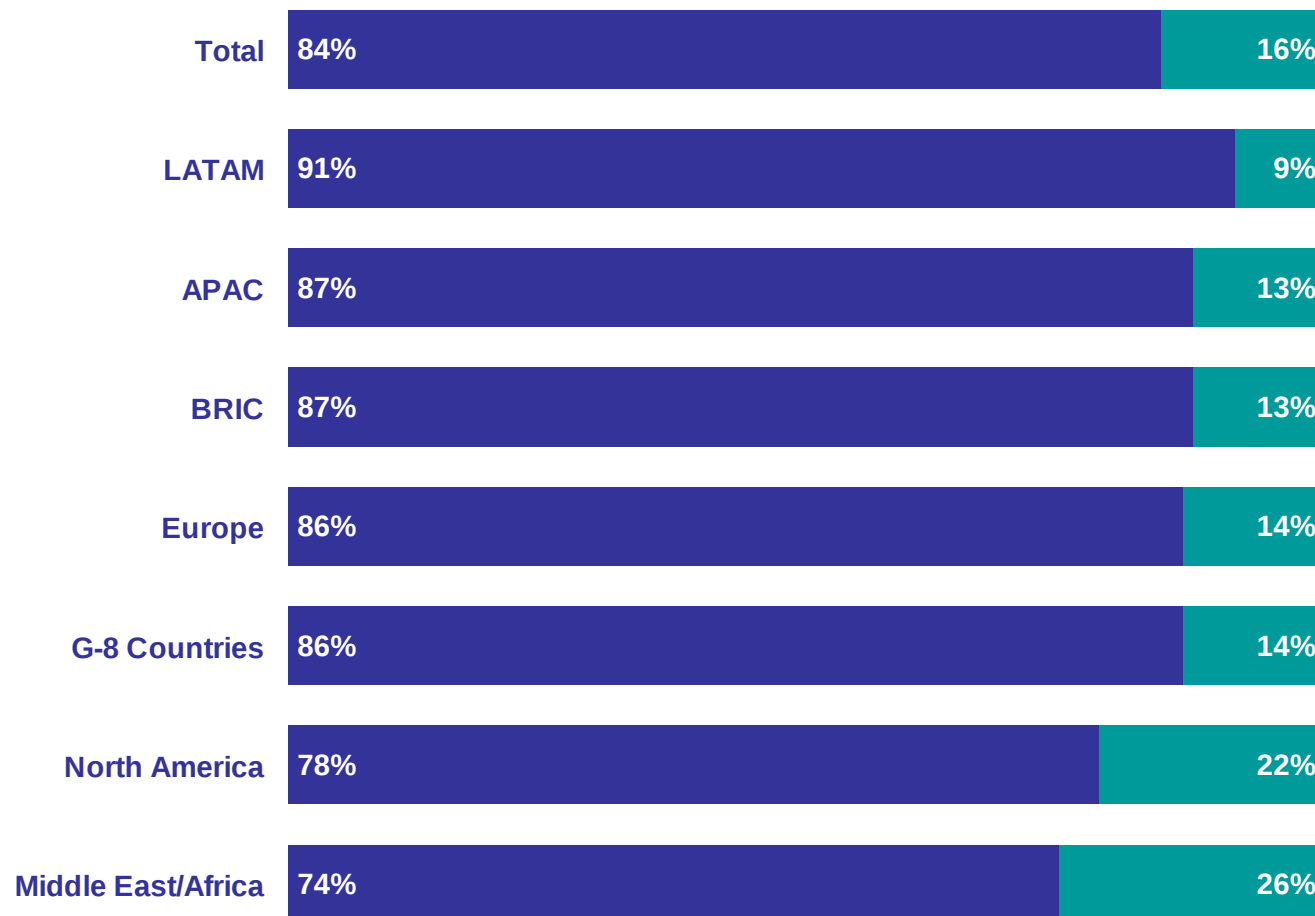
Base: Traveled By Plane In Past 3 Months

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Do you think that the security procedures at airports for traveling passengers on commercial flights are - Regions

■ A hassle but necessary ■ A hassle and not really necessary



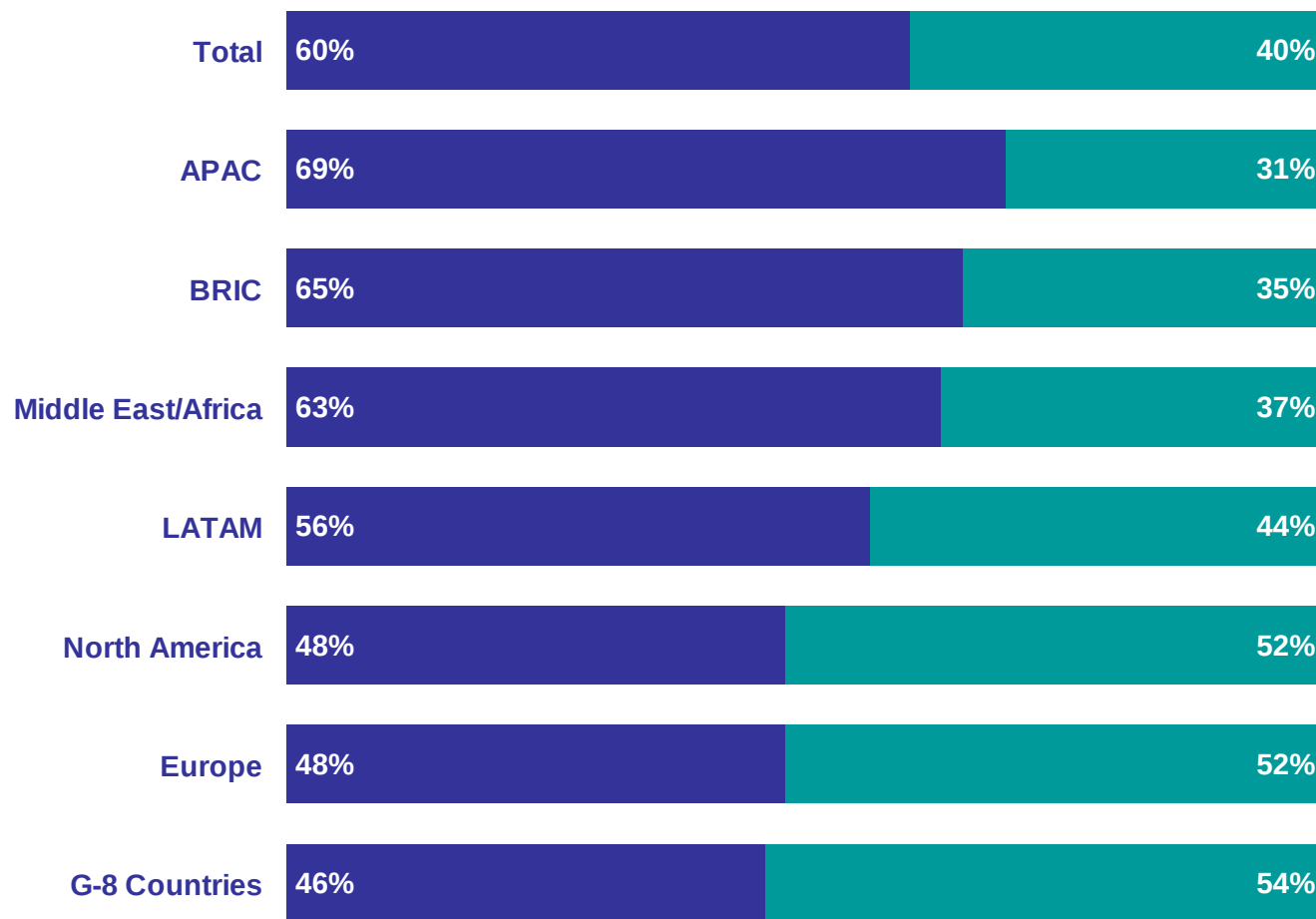
Base: Traveled By Plane In Past 3 Months

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Do you think that the security procedures at airports for traveling passengers on commercial flights are - Regions

- Is doing a good job of deterring terrorists/terror threats
- Is really not deterring or catching anyone who wants to carry out an act of terrorism/terror threats



Base: Traveled By Plane In Past 3 Months

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- The Ipsos *Global @dvisor Omnibus* is a monthly, online survey of consumer citizens in 24 countries and produces syndicated reports and studies specifically tailored to the needs of corporations, advertising and PR agencies, and governments. For information contact:

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