Prob*it* Survey

March 31, 2011

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Most travellers (7 in 10) said they are familiar with the restrictions and had enough information prior to screening. These results are largely unchanged from 2010. That said, many are clearly missing important details. Information should be framed as a reminder, however; delivered, if possible, when PAX are booking their trip (7 in 10), or packing for it (1 in 3).

Confidence in security screening is moderately with 57% expressing confidence and another 1 in 4 expressing moderate confidence. Confidence is higher among PAX in airports (69%).

Sizeable numbers of PAX find the screening process annoying (1 in 3) and 1 in 4 do not believe that screening increases security. This level of annoyance may not be surprising given that 1 in 3 believe that LAGs do not pose any danger.

Still, 65% of PAX support the restrictions (down slightly from last year at 69%). But, 1 in 5 do not (and another 14% are agnostic). Many expressed concerns about civil liberties and privacy, in fact these results have inched up since 2010.

8 in 10 PAX say that they clearly recall the introduction of the body scanners. PAX embrace the introduction of the technology. Just under 1 in 2 prefer it to an SO. Passenger behaviour observation is considered acceptable by just over half of travellers and somewhat acceptable by another 1 in 3. Few say it is not acceptable (14%).

The purpose of this national survey of PAX is to update knowledge and attitudes related to security screening and restrictions .

The survey was conducted using an online-telephone hybrid approach to collection. The sample was drawn from the EKOS panel Prob*it.*** This panel is collected using random digit dialling (RDD) sampling techniques and random selection of households. It therefore reflects the broader population, unlike opt-in panels, and consequently supports margins of error and statistical testing.**

The survey was conducted between March 22 and 25 and includes 1,072 completed cases. The cooperation rate for the survey was 17%.

The survey questionnaire explored:

► awareness of restrictions and related knowledge; attitudes regarding security screening, restrictions and other relevant attitudes; and,
► awareness of the introduction of body scanners and preferences for technology or SO PSOP, as well as acceptability of behaviour observation.

Awareness of restriction policies

Mark, Halifax

**7 in 10 travellers believe they are familiar with the restrictions. Almost all PAX rate themselves as at least moderately familiar with the restrictions. PAX's sense of familiarity also seems to be increasing with time. When prompted, however, large numbers
(1 in 4) are missing important details (e.g., understanding that 100 mls is based on size of container).**

  ► Knowledge or restrictions is weaker among the least travelled, although even those who travel 2 or more times in 2 years are well aware of the restrictions. That said, only those travelling frequently (10+ in two years) are highly likely to know that the size of container is the yardstick by which to measure 100 mls.

Most travellers (8 in 10) say that they had enough information about what they were permitted to bring on the aircraft before they arrived. Results are stable from last year.

Most PAX say the best time to receive information about restrictions is when booking a flight (7 in 10). Packing for a trip (34%) and at the time of researching a trip (32%) are also reported as good opportunities, as was the case in 2010.

How familiar would you say that you were before today with the restrictions on the amount of liquids, aerosols and gels permissible in carry on and checked baggage on flights leaving from Canadian airports?

	2009 %	2010 %	2011 %
Not familiar (1-3)	7	6	6
Moderately familiar (4)	22	25	26
Familiar (5-7)	71	68	69

7 in 10 rate themselves as familiar with the restrictions. Very few believe that they are unfamiliar with them.

Familiarity is stable over time.

Prior to arriving at the security screening on that last trip, did you feel that you had sufficient information about items you are not permitted to bring on the aircraft?

	2010 %	2011 %
Yes	81	79
No	17	20
Don't know/no response	2	1

Most (8 in 10) believe they had the information they needed.

At the time of booking, followed by packing and researching are the best times to provide this information.

Results are stable over time.

When would be the best time for you to get information or a reminder? Would it be ...?

	2009 %	2010 %	2011 %
When you are booking your airfare	67	69	70
When you are packing for your trip	25	37	34
When you are researching your trip (e.g., costs, schedules, accommodation, etc)	11	35	32
At the airport	17	20	19
When you are shopping for the things you will need to take with you on your trip	4	16	19
On your way to the airport	2	3	2
Other (specify)	--	4	5
Don't know/no response	--	1	1

To the best of your knowledge, which BEST describes the restrictions on the liquids, aerosols, and gels (LAGs) that air travellers can bring through the security screening point at Canadian airports?

	2010 %	2011 %	
Passengers can only bring through SMALL AMOUNTS (100mls), of any LAGs, through screening, in a 1 litre clear plastic bag	80	82	✔
Passengers are NOT ALLOWED to bring ANY LAGs through security screening	10	7	✘
Passengers are allowed to bring SOME TYPES of LAGs, like toothpaste or shampoo, through security screening but not other types	6	6	✘
Don't know/no response	3	4	✘

When you hear that the restriction is in place for amounts of more than 100 ml, as far as you know is that referring to the actual amount of liquid, aerosol or gel in the container or is it referring to the maximum size of the container itself?

	2010 %	2011 %	
The maximum size of the container	64	64	✔
The actual amount of LAG	26	25	✘
Do not know	9	11	

In spite of reported comfort levels with the restrictions, 1 in 3 are missing necessary information as was the case in 2010.

These results are similar to results found in intercept of PAX at airports

Passenger attitudes

Wayne with Susan and Paul, Halifax

Sizeable numbers of PAX find the screening process annoying (1 in 3) and 1 in 4 do not believe that screening increases security. This skepticism and annoyance seems to be stable over time.

► Annoyance peaks with the most travelled and business travellers.
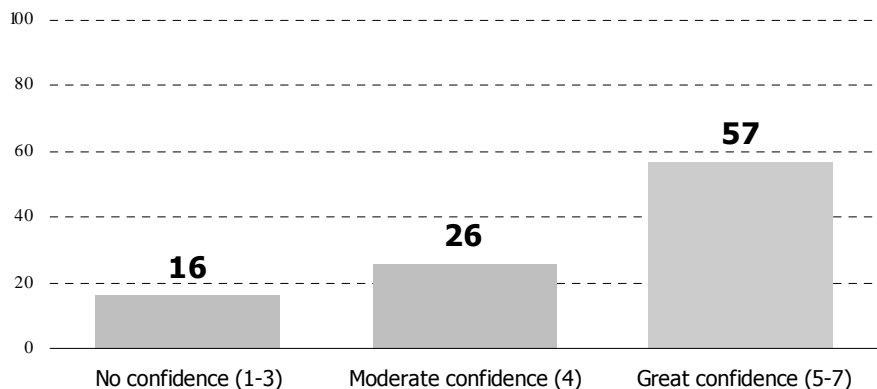
1 in 3 believe that LAGs do not pose any danger.

65% support the restrictions, although 1 in 5 do not (and another 14% are agnostic). Again, levels of opposition seem to be stable over time.

► As in the past, opposition is most concentrated among the most frequent and business travellers.
► Confidence is also weakest among the most frequent travellers.

Many expressed concerns about civil liberties and privacy.

► Almost half said current security focus unnecessarily restricts privacy and civil liberties (growing marginally over time)
► The same proportion think it is acceptable to give special attention to certain types of individuals (e.g., based on ethnicity, race, cultures), as was the case last year.
► 4 in 10 belief that agencies should have more powers to ensure security even if it means giving up some personal privacy safeguards (although slightly more disagree than agree, and agreement is slipping over time).
► 7 in 10 believe that government should strive for a reasonable balance between inconvenience and risk, as was the case in 2010.

Overall, how much confidence do you have that security screening procedures in place at Canadian airports make air travel more secure?

57% rated themselves as confident in the security screening procedures, although this is somewhat lower than found among PAX at the airport (when it was 69% earlier this year).

Attitudes regarding screening and restrictions

Can you tell me how strongly you agree or disagree with each of the following statements.

	2010		2011	
	Disagree (1 to 3)	**Agree (5 to 7)**	**Disagree (1 to 3)**	**Agree (5 to 7)**
I believe that security screening at Canadian airports really does increase the security of air travel	25	61	24	63
If I knew where to purchase LAGs in 100 ml containers for the products that I use, I would definitely make a point of buying them for air travel	19	62	21	58
I get really annoyed with the whole security screening process at Canadian airports	50	33	49	35
I don't really believe that LAGs pose any danger on airplanes	51	32	50	32

Although most PAX are positive about the restrictions, 1 in 3 to 1 in 4 report some frustrations with the policy.

These results are generally less positive than found in the intercept of PAX at airports.

These restrictions are in place to prevent dangerous items such as liquid explosives from being carried aboard an aircraft. To what extent would you say you support or oppose these restrictions?

	2010 %	2011 %
Oppose (1-3)	19	21
Neither (4)	11	14
Support (5-7)	69	65

2 in 3 travellers are supportive of the policy overall, although 2 in 10 are opposed.

Results are generally less positive than found in the intercept of PAX at airports where 8 in 10 are supportive.

Results are also slipping marginally over time from the 69% support found in 2010.

Can you tell me how strongly you agree or disagree with each of the following statements.

	2010		2011	
	Disagree (1 to 3)	**Agree (5 to 7)**	**Disagree (1 to 3)**	**Agree (5 to 7)**
I generally go out of my way, well in advance, to be prepared so that I don't have any last minute hiccups or surprises	7	86	9	85
Realistically, the job of governments is not to produce a world of zero risks, but to balance overall risks with the inconvenience that it causes to Canadians	17	70	18	69
I feel I have less personal privacy in my daily life than I did two years ago	27	52	23	59
I think it is acceptable that security officials, such as police, airport and customs officials, give special attention to individuals of certain ethnic origins/races and cultures	39	47	41	47
I am concerned that our current focus on security will unnecessarily restrict the privacy and civil liberties of Canadians	43	43	41	47
Police and intelligence agencies should have more powers to ensure security even if it means I have to give up some personal privacy safeguards	39	46	45	40

Results reveal significant splits in some areas regarding powers dedicated to officials in the name of security.

New Measures

8 in 10 PAX say that they clearly recall the introduction of the body scanners. In fact, recall of the scanners has had fully twice the retention that the initial incident has had.

PAX embrace the introduction of the technology. 1 in 2 prefer it to an SO. 1 in 4 have no preference. Only 1 in 4 have a preference for an SO. Preference for the body scanner is slipping over time and preference for the SOs is increasing.

► This preference for technology is even more pronounced among pleasure travellers.

► The lean to technology is also stronger among those who support the restrictions. Those who oppose them are more apt than other PAX to go with SO (although even in this segment the lean is toward the machines).

Most PAX (85%) say that passenger behaviour observation is at least somewhat acceptable (with 53% finding it to be very acceptable). Few (14%) find it to be problematic.

Awareness of body scanning machine

Before today, had you heard about the introduction of a body scanning machine that you step into that performs physical search of your body as part of security screening at an airport?

	2010 %	2011 %
Yes, clearly	79	80
Yes, vaguely	16	16
No, not at all	4	4

Recall of the introduction of body scanners in the security screening process is clearly recalled by 8 in 10, and virtually no one has no recall.

Results are stable over time.

If you were asked to go through a physical search as part of security screening at an airport, would you prefer to have it done by a Screening Officer or would you prefer it done by a machine which would scan your body?

Preferences	2010 %	2011 %
(1) Strong preference for Screening Officer	9	13
(2 or 3)	8	10
(4) No preference	27	25
(5 or 6)	18	18
(7) Strong preference for technology	36	29

Almost 1 in 2 (47%) express a preference for the technology, which is almost twice as many as express a preference for a pat down by an SO (23%).

Results are shifting somewhat with the preference for technology waning over time.

Some countries are considering the use of what is called *passenger behaviour observation*, which involves closely monitoring behaviour of travelers to identify security threats, similar to how other security officials are trained to detect suspicious behaviour.

How acceptable would it be to you if CATSA employees were trained in this type of monitoring and used it at Canadian airports to detect security threats?

	%
Not at all acceptable	5
Not very acceptable	9
Somewhat acceptable	32
Very acceptable	53
Don't know/no response	2

Most PAX (85%) find the concept of behaviour observation to be at least somewhat acceptable, and over half find it to be very acceptable. 1 in 6 find to be not acceptable.

Appendix A:
travelling profile of PAX

Charnell, Halifax

1 in 4 respondents travel infrequently, 4 in 10 travel a moderate amount, and 1 in 3 travel frequently (5 or more trips in 2 years). Most travel for personal reasons (2 in 3), although some travel for both (15%). 12% are business travellers.

Reflecting normal traffic patterns half of travellers come through the top 3 airports, although travellers coming through Calgary airport rival those coming out of Vancouver in this wave.

Almost 9 in 10 check some luggage. Just under 6 in 10 use the check in counter. Crossing these two, PBS is the first point of contact for 7% of travellers.

► As expected, CATSA is more often the first point of contact for less frequent and pleasure travellers.

In terms of information opportunities, 45% report using air carriers to book their (last) trip. 1 in 4 used a travel agent, and another 16% booked with a travel agent online. Online booking with an air carrier and travel agent is on the rise from 2010.

► Air carriers (online) are the most frequent source for booking with frequent, business travellers. Infrequent, pleasure travellers are more apt than other PAX to rely on travel agents (in-person).

How many times have you traveled by air from a Canadian airport in the past two years?

Times Flown (Past 2 years)	2010 %	2011 %
None	10	8
Once	16	16
2 – 4 times	43	38
5 – 9 times	19	20
10+ times	13	14

Over the past two years, did you fly mostly for business or personal travel?

Type of Traveller	2010 %	2011 %
Personal	66	66
Business and Personal	14	15
Business	12	12
Don't know/no response	8	7

Thinking about your last trip through a Canadian airport, did you travel for business, for pleasure or for both?

Type of Traveller	2010 %	2011 %
Personal	78	75
Business	17	18
Business and Personal	5	6

On your last trip, did you check any luggage, or did you only have carry on?

Type of Traveller	2010 %	2011 %
Yes, checked some luggage	88	89
No, only had carry-on	11	10

On your last trip, did you check in through the check in counter, self-serve kiosk or online?

Method of Check-in	2010 %	2011 %
Check-in counter	60	57
Self-service kiosk	21	24
Checked-in through website	17	18

What airport did you fly from on your last trip?	2010 %	2011 %
Toronto	28	31
Montreal	16	15
Vancouver	10	9
Calgary	8	9
Edmonton	5	5
Winnipeg	3	4
Ottawa	10	4
Victoria	2	3
Halifax	4	3

	2010 %	2011 %
Quebec City	2	2
Kelowna	1	2
Saskatoon	1	2
St-John's	1	1
Regina	1	1
London	--	1
Fredericton	--	1
Moncton	--	1
USA (various States)	1	1
Other	2	2

How did you book your ticket for your last trip?

	2010 %	2011 %
With air carrier online	40	45
With travel agent in-person or by phone	30	25
With travel agent online	14	16
With air carrier on the phone	5	6
Other	9	6
Don't know/no response	2	2