



**Survey: *“Traveler Perspectives on Aviation Security
10 Years after the Creation of TSA”***

November 16, 2011

Executive Summary

The Transportation Security Administration (TSA) was created by the Aviation and Transportation Security Act (P.L. 107-71), which was signed into law on November 19, 2001. Ten years after the creation of TSA, aviation security has vastly improved from the era before the terrorist attacks of September 11, 2001. While Congress and TSA have taken significant steps to improve the security of our aviation system, the security screening process itself remains inefficient and frustrating for millions of Americans – dampening demand for air travel and requiring increased taxpayer investment in TSA’s annual budget.

To its credit, this year TSA announced several new initiatives to improve the efficiency and effectiveness of the aviation passenger screening process. Highlights of a newly released survey conducted by TNS TravelsAmerica on behalf of the U.S. Travel Association show that:

- A majority of air travelers support the agency’s recent efforts to improve the passenger screening process and believe that the agency is headed on the “right track”;
- Despite support for these new procedures, a majority of air travelers have not recognized any improvements in checkpoint efficiency, when compared to the previous year;
- Four out of air travelers’ top five frustrations with flying are directly related to the TSA passenger screening process; and
- When made aware of TSA’s new initiatives, a majority of air travelers say they are likely to take more trips than they did the previous year.

The following is a summary of the results of the TNS TravelsAmerica survey.

Travelers Support TSA’s New Initiatives - Believe TSA is on the “Right Track”

The TNS survey found that a majority of air travelers are satisfied with TSA’s overall performance as it relates to security, with:

- 66.2 percent somewhat/very satisfied;
- 21.2 percent neutral; and
- 12.5 percent somewhat/very dissatisfied.

However, frequent air travelers are less satisfied with TSA’s overall performance than non-frequent air travelers, with:

- Only 54.6 percent of frequent air travelers somewhat/very satisfied (compared to 67.8 percent of non-frequent air travelers); and
- 28 percent of frequent air travelers somewhat/very dissatisfied (compared to 10.4 percent of non-frequent air travelers).

The survey also found that a strong majority of air travelers support TSA’s new initiatives to improve passenger screening. Specifically:

- 74.5 percent are somewhat/very satisfied with TSA’s announcement that it will eventually phase out the requirement for persons to remove their shoes;
- 73 percent are somewhat/very satisfied that TSA will no longer pat down children 12 years old or younger except in unusual cases;
- 69.9 percent are somewhat/very satisfied that TSA is implementing a trusted traveler program called PreCheck; and
- 68.2 percent are somewhat/very satisfied that TSA will now use new software for full body scanners that displays a generic stick figure when viewed by security officers.

The survey found that, when considering TSA’s new initiatives, 68.5 percent of air travelers believe that TSA is headed on the “right track” – with only 9.4 percent believing that TSA is on the “wrong track” and 22 percent “not sure.”

Majority of Air Travelers Still Experience Inefficiencies in Security Screening

Despite TSA’s new initiatives to improve passengers screening, an overwhelming majority of air travelers have not recognized any improvements in checkpoint efficiency when compared to the previous year. Specifically, of all respondents:

- 88.7 percent primarily consider the time it takes to get through security screening when deciding how far in advance to arrive at the airport;
- 79.5 percent show up at the airport more than one hour before their flight; and
- 81.8 percent plan to arrive at the airport the same amount of time before a flight as they did last year.

The Security Screening Process Remains the Top Frustration

Although passengers are supportive of TSA’s new screening initiatives, four of the top five frustrations of air traveler relate to the security screening process. When asked to list their top five frustrations with air travel:

- 72.4 percent chose “people who bring too many carry-on bags through the security checkpoint”;
- 70.4 percent chose “uncomfortable seating on an airplane”;
- 68 percent chose “the wait time to clear the TSA checkpoint”;
- 62.3 percent chose “having to remove shoes, belts and jackets at the TSA checkpoint”; and
- 42.5 percent chose “TSA employees who are not friendly”.

Responses varied slightly when examining the difference between frequent and non-frequent air travelers. The most commonly cited frustration among frequent air travelers was “the wait times to clear TSA checkpoints” (76 percent), followed by “people who bring too many carry-on bags” (70.7 percent). Among non-frequent travelers, the top frustration was “people who bring too many carry-on bags through security checkpoints” (72.6 percent), followed closely by “uncomfortable seating on an airplane” (72 percent).

When Considering TSA's New Initiatives, Passengers are Likely to Fly More

After being made aware of TSA's new screening initiatives, air travelers were asked if they were likely to take more trips next year by commercial airline. A majority of air travelers said they were likely to fly more, with:

- 49.8 percent very/somewhat likely;
- 37.1 percent not too/not at all likely; and
- 13.1 percent not sure.

Of those passengers that were very/somewhat likely to take more trips next year, 63.4 percent responded that they would take between one and six additional flights.

Methodology

The TSA Anniversary Survey was a national online survey, conducted by TNS, one of the world's largest custom market research specialists. The survey respondents consisted of a sample pre-selected from TNS TravelsAmerica, a syndicated tracking study that provides a comprehensive view of American travelers' characteristics. TravelsAmerica is based upon a U.S. nationally representative sample from TNS' 6th dimension Global Access Panel. Each month, TNS conducts over 10,000 internet-based interviews among past 12-month travelers who have traveled more than 50 miles from their homes (excluding commuters).

The TSA Anniversary Survey respondents were built from TravelsAmerica's 4,397 past 12-month air travelers. The qualifying criteria for an air traveler is somebody who traveled by plane from a United States airport using a scheduled commercial airline within the past 12 months. Interviews were done from October 6 to October 20 with a total of 604 completes. The sample was balanced to the TNS online panel universe on geographic region, income, market size, household size, age and gender. The survey has a margin of error of +-4% at 95% confidence level.