



9/11

OpinionSurvey

R E P O R T

A CHANGED NATION:

An In-depth Look at Changed American Attitudes towards
Terrorism, Personal Freedoms and Security a Decade After 9/11



9/11 OPINION SURVEY

EXECUTIVE SUMMARY REPORT

9/11 Opinion Survey authored by Cote & D'Ambrosio (www.DisasterSafetyStrategies.com)
in conjunction with Wallace and Washburn.

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About the 911 Opinion Survey

The *911 Opinion Survey* sought to explore Americans’ attitudes about terrorism and natural disasters a decade after 9/11. The survey was developed and administered by Cote & D’Ambrosio (www.disastersafetystrategies.com) and Wallace & Washburn, (www.wallacewashburn.com) two leading research and communications firms heavily involved in disaster safety communications.

Co-sponsors of the report include the Association of State and Territorial Health Officials (ASTHO), the International Association of Emergency Managers (IAEM), the National Association of County and City Health Officials (NACCHO), the National Emergency Management Association (NEMA), and Rx Response, an initiative of the bio-pharmaceutical supply chain to help ensure the flow of medicine following a major disaster.



Methodology of the 911 Opinion Survey

Two versions of the *911 Opinion Survey* were developed: one for consumers and the second for U.S. professional emergency managers and public health officials. Both surveys included several common questions that enabled survey authors to evaluate the differences in opinions between professional emergency managers and consumers on several key topics. Due to security considerations, the answers to some questions asked of professional emergency managers and homeland security officials are not being publicly released.

The online consumer survey was taken by 775 Americans, with a focus on Americans who own their homes (79%). It was promoted via national press release and also distributed by local emergency managers and public health officials to consumers in their areas. Other consumer participants were secured through a Zoomerang® sample to ensure sufficient representation (for statistical analysis) of Hispanics and African Americans.

The Emergency Managers and Public Health Professionals survey was taken online by 905 professionals throughout the United States. It was developed with input from NEMA, IAEM, ASTHO, NACCHO and Rx Response. Each of these organizations shared the survey with their members/stakeholders, helping to boost participation. Both surveys were closed on Thursday morning, August 25, 2011 to avoid the possibility of Hurricane Irene influencing the results. Open-ended questions were analyzed for key words employing Wallace & Washburn's ThoughtScan Analysis® process. The margin of error for both surveys is +/- 4 %.



About the Authors

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Eric Cote is the co-founder of Cote & D'Ambrosio, a communications firm with expertise in disaster safety research, communications, advocacy and policy consulting. As a former senior advisor and press secretary to a governor and member of Congress, Eric has a strong understanding of public policy, media relations and message development.

Eric's experience in the disaster safety arena began in 1999 when he helped turn the Oklahoma City Bombing into a catalyzing event for a life-saving American industry. In the years since, Eric and his team have been involved in the development and implementation of many public safety initiatives, including innovative programs associated with 9/11, Hurricane Katrina, the H1N1 Pandemic and other natural disasters. Eric can be reached at cote@cotedambrosio.com or at 401-294-4444, ext. 202.

Cara Klein

Cara Klein is a principal with Cote & D'Ambrosio and has extensive experience developing messages that encourage consumers to protect themselves and their families from the impact of natural disasters. She is also a recognized leader in overcoming the challenges associated with promoting mitigation products and technologies to architects, builders and other building trade professionals.

Cara has been a long time corporate partner of key non-profit disaster safety organizations, helping to fund and guide innovative programs to advance the Disaster Safety Movement.

Among her many accomplishments, she developed the strategic marketing plan for the Federal Alliance for Safe Homes (FLASH®) to support the launch of StormStruck®, the interactive severe weather experience at Walt Disney World's® Epcot® Resort in Lake Buena Vista, Florida. Cara can be reached at klein@cotedambrosio.com or at 941-351-0536.

Kim Wallace

Kim Wallace is the co-founder of Wallace & Washburn, a leading research firm based in Cambridge, MA. Kim has spent many years leading consumer research initiatives for many of



America's largest consumer brands. He joined the Radcliffe University Seminars Program in 2002 and guest teaches at Harvard Extension School, Brown University, and Babson College. W&W clients include the Harvard Business School, Gillette, MIT Sloan School, IBM, Blue Cross/Blue Shield, General Foods, Fidelity Investments and Proctor & Gamble. Through his work with Cote & D'Ambrosio, Kim has directed comprehensive qualitative and quantitative research initiatives to measure consumer attitudes towards terrorism and natural disasters. These initiatives have provided policy makers and disaster safety organizations with strategic guidance and winning messages that encourage greater preparation for disasters. Kim can be reached at pkimballw@comcast.net or at 781-235-8882.





About the Survey Sponsors

ASTHO - The Association of State and Territorial Health Officials is the national nonprofit organization representing public health agencies in the United States, the U.S. Territories, and



the District of Columbia, and over 100,000 public health professionals these agencies employ. ASTHO members, the chief health officials of these jurisdictions, formulate and influence sound public health policy and ensure excellence in state-based public health practice. ASTHO's

primary function is to track, evaluate, and advise members on the impact and formation of public or private health policy which may affect them and to provide them with guidance and technical assistance on improving the nation's health.

IAEM-USA - The United States Council of the International Association of Emergency Managers is the nation's largest emergency management professional association. IAEM-USA represents



more than 5,000 emergency management and homeland security professionals for local communities, state and federal disaster officials, private sector, non-governmental organizations and others involved in preparing for, responding to, and recovering from all types of disasters

including acts of terrorism. IAEM provides access to the largest network of emergency management experts who can provide advice and assistance, the Certified Emergency Manager® program, annual scholarships, a comprehensive monthly newsletter, and more.

NACCHO – The National Association of County and City Health Officials' members are the 2,700 local health departments across the United States. NACCHO's vision is health, equity, and well-



being for all people in their communities through public health policies and services. NACCHO's mission is to be a leader, partner, catalyst, and voice for local health departments in order to ensure the conditions

that promote health and equity, combat disease, and improve the quality and length of all lives.

NEMA - The National Emergency Management Association is a nonpartisan, nonprofit 501(c)(3) association dedicated to enhancing public safety by improving the nation's ability to prepare for, respond to, and recover from all emergencies, disasters, and threats to our nation's



security. NEMA is the professional association of and for emergency management directors from all 50 states, eight U.S. territories, and the District of Columbia. NEMA provides national leadership and expertise in comprehensive emergency management, serves as a vital emergency management information and assistance resource, and advances continuous improvement in emergency management through strategic partnerships, innovative programs, and collaborative policy positions.

Rx Response - Rx Response is an initiative of America’s bio-pharmaceutical supply system to



help ensure the continued flow of medicine to patients in a severe natural disaster, large-scale terrorist attack or an influenza pandemic. The inspiration for Rx Response came from Hurricane Katrina. Members of the bio-pharmaceutical supply chain realized that a critical factor in preserving and protecting public health following Katrina was ensuring continued access to essential medicines – both to treat injury or illness caused by the hurricane, as well as continued supply of essential day-to-day medicines to patients for the duration of the emergency.



Key Findings of the 9/11 Opinion Survey

Summary Analysis

A decade after 9/11, a majority of Americans (55%) are willing to give up some personal freedoms and civil liberties to enable homeland security and law enforcement officials to better protect them from terrorist threats. At the same time, a significant number of Americans are suggesting increased profiling of potential terror suspects as a key step to thwart attacks. Despite the euphoria over the death of Osama Bin Laden, 71% of consumers and 69% of professionals believe the threat of a terrorist attack in the U.S. is just as likely following his death. Twice as many professional emergency managers as consumers (28% vs. 13%) believe an attack in the U.S. is even more likely since Bin Laden's death.

When it comes to why there has been no major terrorist attack since 9/11, 59% of consumers credit the U.S. government for making it more difficult for terrorists to attack. 36% of these respondents believe the U.S. government has stopped recent attempts and didn't tell the American people. Professional emergency managers and homeland security officials are far more concerned (61%) about radicalized Americans being the source of future attacks than consumers who fear foreign born terrorists who have been living in the U.S. for some time (38%), followed by foreign based terrorists who infiltrate the U.S. (26%).

Americans have modified many personal behaviors as a result of 9/11. The majority (82%) have the threat of a terrorist attack on their minds. 74% of consumers agree that they are more likely to report any suspicious activity to authorities than before 9/11. A majority (68%) are more alert about who is sitting near them when using public transportation and nearly half of those using public transportation think about the possibility of having to help stop a terrorist from carrying out an attack. Over half (61%) have changed where they would vacation internationally out of concern for attacks.

When asked about consumers' concern for natural disasters, consumers reported that they are very concerned about the following: Lightning strikes (19%); Tornados (17%); Flooding (17%); Hurricanes (15%); Ice storms (15%); Earthquakes (13%); Hail Storms (13%); and Wild fires (11%). Professionals feel that that our nation is somewhat or very prepared to respond to Wildfires (46%), Flooding (42%), Tornados (42%), Lightning (41%), Ice Storms (37%), Hail (36%), Hurricanes (36%), Land/Mud slides (22%), Earthquakes (19%), and Tsunamis (8%).



When assessing the increase in preparedness post 9/11 across federal, state and local governments, only about a fifth of professionals believe government has become “much better prepared” for terrorist attacks or natural disaster in the past 5 years. The percentages are Federal Government (22%), State Government (22%) and Local Government (20%). In contrast, only 10% of professionals believe the private sector is “much better prepared.” There is broad agreement that all levels of government and the private sector are making progress in being “somewhat better prepared” over the past five years as evidenced by these percentages: Federal Government (67%), State Government (63%), Local Government (55%) and Private Sector (51%).

The top ranked actions that consumers have taken to protect themselves and their families from disasters in the past couple of years include the following: 39% of consumers have created a family disaster plan, including an evacuation route and emergency housing location; An equal percentage have upgraded their homeowner’s or renter’s insurance to cover more potential disaster damage; One third (34%) have purchased a disaster supply kit; 23% have purchased a standby generator; 22% have added lightning surge protection to their whole house; and 21% have purchased flood insurance.

Other key findings:

- When it comes to the likely targets of future terrorist attacks, professional emergency managers and homeland security officials have significantly different views than consumers about the nature of the attacks that we may see. (For security considerations, the details of this response are not being released.)
- Other gaps in the views of professional emergency managers and consumers exist around topics of preparedness and personal responsibility. 21% of consumers strongly agree and 42% somewhat agree that it’s the responsibility of the government to subsidize the rebuilding of their home or find them temporary housing if their home is destroyed by a natural disaster and they don’t have sufficient insurance coverage. In contrast, only 7% of professional respondents strongly agree and 34% somewhat agree. 60% of consumers strongly agree that they have sufficient insurance coverage for rebuilding.
- Nearly half of both consumers (47%) and professionals (41%) strongly agree that Americans have an obligation to look out for neighbors who are more vulnerable during disasters.



- 67% of professionals strongly agree that even though it's been 10 years since 9/11, the threat of a terrorist attack in America is "still on my mind," compared to only 43% of Americans.
- 55% of consumers are very or somewhat willing to give up some personal freedoms and civil liberties to enable homeland security and law enforcement officials to better protect them from terrorist threats.
- When asked the single most important step law enforcement and counter terrorism officials should take to protect Americans from terrorist attacks in the face of limited resources, a composite of the consumer responses, based on ThoughtScan Analysis®, yielded this statement, "More people to protect the country, increased profiling, better intelligence and stepped up border security."
- When it comes to the source of future terrorist threats, professional emergency managers and consumers have a similar view about the high risk posed by foreign born terrorist who have been living in the U.S. for some time. However, professionals see far greater threats coming from radicalized Americans than do consumers (52% vs. 15%).
- Professionals want more private sector involvement to help with recovery from a disaster. 81% "strongly agree" that the private sector has capabilities that should be levered in partnership with government resources to help recover from disasters. 68% of professionals believe the private sector has an equally important obligation to be prepared to meet the public's needs following a disaster and 61% believe states and major cities should have dedicated programs that engage the private sector in helping communities recover from a disaster.
- 57% of consumers strongly agree that private businesses should have plans in place to reopen quickly after a disaster and 46% strongly agree that it's a business' obligation to have a recovery plan in place to ensure continued employment following a disaster.
- 47% of professionals agree that stronger building codes would make a big difference in reducing damage due to natural disasters. When consumers were asked which actions they had taken in the past couple of years to protect themselves and their families, home fortification actions such as adding window protection, reinforcing garage doors, strengthening their roof or adding a safe room ranked the lowest.



- 43% of professionals strongly agree that if we don't maintain the significant investment in homeland security at the federal, state and local level that started after 9/11, America will become more vulnerable and less able to respond to natural disasters or terrorist attacks.
- Nearly a quarter of professionals strongly agree that the nation's increased investment in national security has created unrealistic expectations of the government's ability to prevent future terrorist attacks (24%) and has created unrealistic expectations of the government's ability to respond to natural or manmade disaster (21%). Yet in an indication of split views on this topic, nearly the same percentage (19%) of professionals feel that public expectations are well aligned with government's ability to respond to a natural or manmade disaster.



Full Results of Consumer Survey

Full results of the consumer survey, including verbatim responses to all open ended questions, are available online at the following address:

<http://www.zoomerang.com/Shared/SharedResultsSurveyResultsPage.aspx?ID=L26V2BBLLGZZ>



Abridged Results of Professional Survey and ThoughtScan Analysis® of Consumer and Professional Survey

Due to security considerations, the following link provides significant but limited results of the professional survey because the answers to certain sensitive questions are not being released. Homeland security officials, law enforcement or emergency management and public health professionals can contact their sponsoring organization for access to the full results.

Also available at this link is the ThoughtScan Analysis® of both the Consumer and Professional Surveys. C&D's research partner Wallace & Washburn has developed the ThoughtScan Analysis® tool to help analyze the verbatim responses to open ended questions. ThoughtScan provides a ranking of the most commonly used words in verbatim responses, enabling researchers to identify key themes emerging from an unlimited number of respondents. These themes are reflected in a Composite ThoughtScan Sentence.

ThoughtScan Analysis® was performed on all verbatim responses to open ended questions in the 911 Opinion Survey. www.disastersafetystrategies.com/research.htm

Acknowledgement

Cote & D'Ambrosio and Wallace & Washburn wish to thank ASTHO, IAEM, NACCHO, NEMA and Rx Response for their co-sponsorship of this important survey. We also gratefully acknowledge the more than 1,500 professionals and consumers who took the survey and shared their candid views. The results of this survey will help inform the policy decisions of emergency managers and public health professionals in the years to come.