



Aeronautical Repair Station Association

Positive Publicity Campaign Survey Research Results

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one thomas circle nw • tenth floor • washington, dc 20005
tel: 202.289.2001 • fax: 202.289.1327 • www.stratacomm.net
Offices in Washington, DC and Detroit

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I OVERVIEW

Strata@comm is pleased to present the results of the *Positioning the Benefits of Contract Aircraft Maintenance* study to the Aeronautical Repair Station Association (ARSA).

This document contains key implications and imperatives as well as detailed research findings and a description of the research methodology. Supporting graphics are embedded throughout the document, and additional detail is included as appendix material.

All questions regarding this study and the information contained herein should be directed to:

Bill Buff

Executive Vice President & Senior Partner
Strat@comm
bbuff@stratacomm.net
202.289.2001

Mike Dabadie

Senior Advisor, Strat@comm
Managing Director, Promise
dabadiemichael@yahoo.com
202.870.1234

II KEY FINDINGS: SUMMARY AND IMPLICATIONS

Measuring Saliency

The safety of air travel is a relatively salient issue among Americans with a large majority (73%, 61% DC Elites) saying they are very or somewhat concerned. This concern, however, is tempered as fewer than one-in-three report being very concerned.

Likely as a result of a recent high profile airline accident (Continental flight 3407 outside of Buffalo, NY) and the successful emergency landing of US Airways flight 1549 into the Hudson River, the general public is able to recall issues with aircraft maintenance (or the people or companies responsible for it.) Yet, despite their concern and recall of information, both the general public and DC Elites seem to recognize that airline safety has many facets, as neither group exhibits a predisposition toward negativity about how commercial aircraft are currently maintained. In fact, despite recall of specific maintenance concerns, there is an overall slightly positive perception of aircraft maintenance. However, it is important to note that the saliency of and attitudes about these issues are very pliable, subject to dramatic and rapid shifts based upon current events.

- **Implication:** In summary, ARSA is in a good starting position. Top of mind awareness about aircraft maintenance is neither strongly positive nor negative. Additionally, generally concerns over air safety make people susceptible to messages that heighten their concerns.

Gauging Favorability and Image

Americans and DC Elites hold favorable impressions of the aviation industry in general, the airlines themselves, and of the affiliated regulatory agencies. They are significantly less familiar with – and less favorable toward – the bilateral partner civil air authorities.

While they are not very familiar with either the independent aircraft maintenance companies or the Aeronautical Repair Station Association (ARSA), both groups hold moderately favorable views of these entities.

The general public and DC Elites are currently moderately favorably disposed to contract maintenance, citing “independence/unbiased/no conflict of interest” and “standardization/consistency/ uniformity” as the primary rationale. Detractors of

contract maintenance focus on “diffusing airline accountability/responsibility,” “lack of pride due to lack of company [airline] loyalty,” “limited knowledge of the specific aircraft” as well as “doubting government’s ability to uphold regulations.”

In spite of this support, when presented with the proposal under Congressional consideration that would make it more difficult for any US aircraft to be maintained by contract maintenance, most Americans (59% general public; 53% DC Elites) are unsure as to whether they support or oppose the potential legislation. Among those who have an opinion, comparable proportions express opposition (the ARSA position) as express support.

- **Implication:** Connecting back to the idea that ARSA is in a good starting position ... the starting belief is that commercial aircraft maintenance is good and that FAA-certified maintenance is a good idea.

Understanding Potential Positioning and Determining Benefits

Education and information have a significant positive impact on one’s opposition. The proportion who opposes the potential legislation (taking the ARSA position) increases significantly (to 44% general public, 56% DC Elites) following message and thematic exposure. Proportions that support the legislation remain relatively constant at 28% among the general public and 20% among DC Elites.

- **Implication:** The more communications and education that occurs on this issue, the better. Telling our story works. Organizing a proactive communications program should be a key to impacting this issue favorably.

ARSA Messaging

ARSA’s strongest messages (driving opposition to the proposed legislation) focus on safety, jobs, and expertise:

Safe Business Is Good Business: Cargo air carriers, such as FedEx and UPS have always used contract maintenance stations—allowing them the flexibility to get the maintenance they need, when and where they need it, with the reliability required to ensure their delivery schedules.

- This message is strong among both the general public and DC Elites

Good Jobs: The growing contract maintenance industry is a source of stable, good paying jobs for skilled workers and has absorbed hundreds of employees laid off by struggling air carriers.

- This message is particularly strong among DC Elites, somewhat less so among the general public

Proven Record & Mission Focus: Maintenance stations have been under the scrutiny of the government, airlines, and the public for many years. These stations have demonstrated they have the specialized expertise and high-quality systems that ensure the best maintenance for the airlines and the flying public.

- This message is particularly strong among DC Elites, somewhat less so among the general public

Additionally, the majority of respondents feel contract maintenance ensures aircraft safety.¹ This is most likely due to the view that a singular focus and specialization is of greater benefit than a more diffuse focus. Moreover, a majority credit the airlines' vested interest over FAA oversight for the airline safety record.

The strongest opposition messages center around international concerns:

FAA International Ability: No matter what anyone says, the FAA will never be able to oversee international maintenance stations as well as it can oversee maintenance stations in the US.

- This message is relatively strong amongst both the general public and DC Elites
- Successful ARSA rebuttal messages are "Maintenance stations have been under the scrutiny of the government, airlines and the public for many years. These stations have demonstrated they have the specialized expertise and high-quality systems that ensure the best maintenance for the airlines and the flying public" and "As long as international maintenance is performed under the same safety and certification standards as the US – including strict oversight by US and

¹ Statement wording: Contract maintenance stations are better able to service aircraft, because that is all they do. The major airlines have several aspects to their business, contract maintenance companies benefit from having one mission: ensuring aircraft safety.

foreign governments – there should be no problem with having maintenance done abroad.”

Outsourcing: Using international contract maintenance stations is outsourcing – it sends US jobs overseas. Once the highly skilled aircraft and avionics technicians’ work is cut down, it will be virtually impossible to rebuild.

- This message is particularly strong among the general public, far less so among DC Elites
- The most effective ARSA rebuttal message is the “growing contract maintenance industry” argument.

Terrorism: There are few safeguards in place to prevent terrorists from exploiting an opportunity to do us harm by, for example, tampering with aircraft systems or inserting explosives into aircraft while they are undergoing maintenance.

- This message is moderately strong among both the general public and DC Elites
- This is the most difficult of the opposition messages to counter as it is a message around security, not safety. The ARSA safety message (“The fact that the safest period in the history of civil aviation ...”) can be used to rebut this opposition point of view.

The negative messaging on unions is not effective: a slim majority oppose the unions whereas the balance agrees with the unions.

Information Sources and Messaging Credibility

The National Transportation Safety Board (NTSB) and the Federal Aviation Administration (FAA) have the most credibility in terms of delivering messages regarding contract maintenance. Perceived as more moderately credible are the Airline Pilots Association, the airlines themselves, and the contract maintenance industry associations.

- **Implications:** There are two primary implications coming from the work around Understanding Potential Positioning and Determining Benefits.

First, ARSA must leverage their member and ally success with contract maintenance. Not only do the domestic airlines and the commercial airline industry in general have high levels of familiarity and favorability,

but the airlines are deemed a credible source of contract maintenance information. Additionally, there is strong agreement that contract maintenance makes for a more successful business model (cargo and airline companies), and that the airline industry has more at stake in securing air travel than does the FAA.

Second, evidence suggests that communicating about contract maintenance works to ARSA's advantage. To that end, ARSA should spend as much time as possible on the positive message themes as possible. To the extent appropriate, stay away from terrorism and international safety as not only are these messages not salient, but they build negative concerns and do not reinforce the positives of contract maintenance. If drawn into a debate over these areas, make sure to apply the rebuttal arguments/communications. Finally, fight the temptation to be critical of the unions as this does not further the debate in any way.

Moving Forward

As ARSA considers its next steps, a working framework can be developed around both Protecting and Building the image of ARSA to create an environment where member businesses have greater freedom to operate. There is a subtle, but important difference, between the concepts of Protecting and Building.

- Protecting is about mitigation and neutralizing potential areas of weakness, and we observe that ARSA is doing (and should continue to do) a very good job around the areas of Business methods, Security, Employee Rights and Workforce Development.
- Building is about dealing to your strength and accentuating your positives. In this case, ARSA needs to move to articulate its position and benefits in the areas of Safety, Economic Growth, Job Creation, Member Contributions to their Community, Transparency of Operations, and Business Uniformity around Standards/Regulations.

All of these message areas, however, would benefit significantly by describing their benefits in personal and positive terms of the people and lives that are involved and how they are impacted. Less of our messaging should rely on facts and figures and more should seek to tell our story through the faces, lives, and emotional benefits of ARSA's core positions

III BACKGROUND, RESEARCH OBJECTIVES AND METHODOLOGY

This research engagement is a part of the ARSA Positive Publicity Campaign; a multi-year public relations effort targeted at DC influentials and designed to improve the legal, regulatory, and business climate for contract aviation maintenance companies. This public opinion research is being conducted to help the industry understand the scale of the PR challenge it faces and to guide the development of messages during later phases of the campaign.

Specific research objectives include:

- **Measuring Saliency:** determining the level of concern Americans place on airline maintenance and safety
- **Gauging Favorability and Image:** assessing awareness of and favorability toward the aviation maintenance industry among the general public, frequent travelers and DC influentials
- **Understanding Potential Positioning:** assessing awareness and support of key industry issues and positions
- **Determining Benefits:** identifying positive messages that contribute to favorable support for the industry and its positions
- **Creating Benchmarks:** providing the ability to gauge and guide industry communications initiatives and to measure the impact of these initiatives.

Two distinct groups participated in this research effort: US adults and Washington, DC elite. Data was collected via an online survey conducted February 23 – March 9, 2009.

National: a national survey of 1,007 adults (18 years of age and older), representative of the US population by region, gender, age, race, education, political party, and household income.

- Within this group, the margin of error is +/- 3.1 percentage points at the 95% confidence level

DC Elite: a total of 152 Washington DC opinion leaders were surveyed. In order to qualify as a “DC elite”, participants must live within a 15 mile radius of Washington DC and self-report that they 1) actively follow aviation industry issues AND are informed on aviation industry issues AND voted in the 2008 election OR 2) have participated in at least three of the 13 pre-defined advocacy behaviors in the last year (such as writing a letter to the editor, serving as an officer for an organization, signing a petition, etc.).

- Within this group, the margin of error is +/- 7.9 percentage points at the 95% confidence level

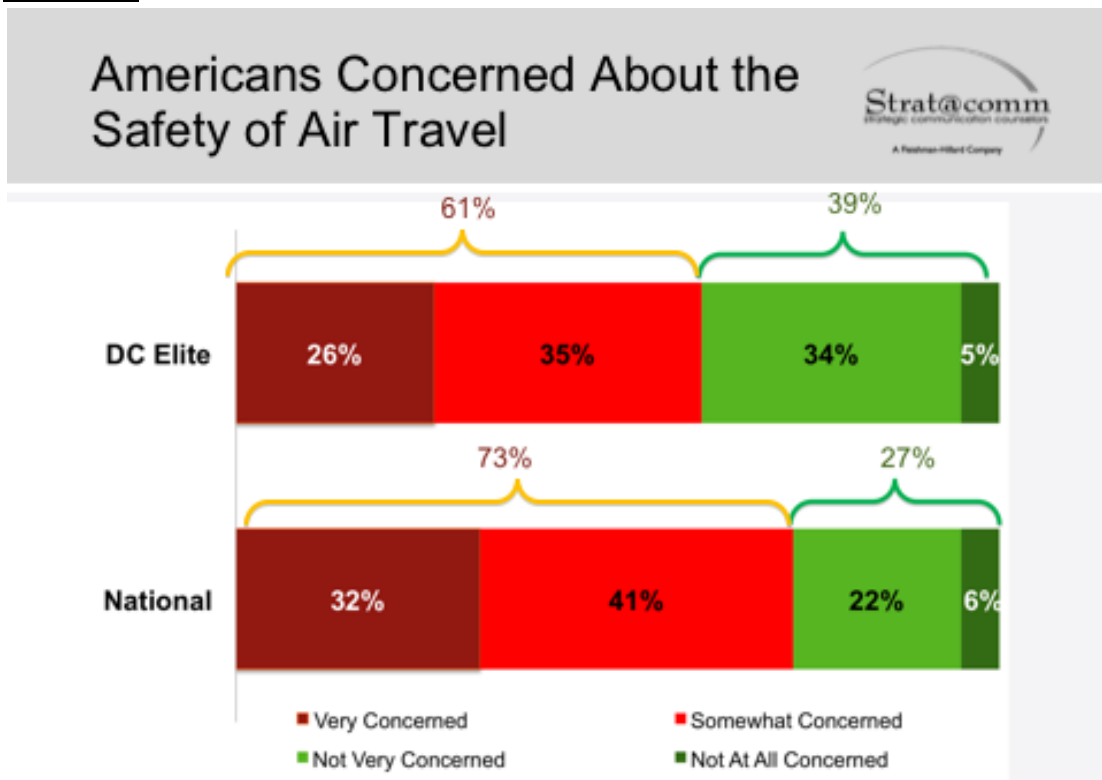
Graphics detailing complete demographic breakdowns can be found in the Appendix.

IV DETAILED FINDINGS

Concern about Air Travel

Americans, including DC Elite, are concerned about the safety of air travel. Nearly three-in four (73%) of the general public and 61% of DC Elites are “very” or “somewhat” concerned about the safety of air travel. However, this concern is somewhat soft as less than one-third of each group (32% National; 26% DC Elite) report being “very” concerned.

FIGURE 1



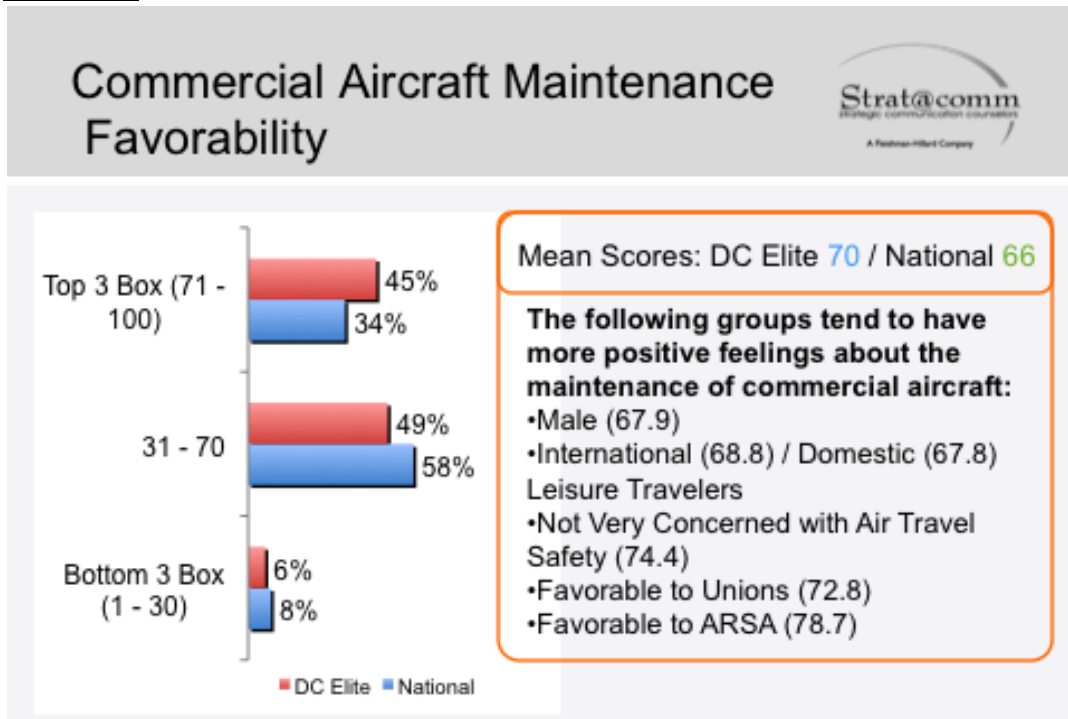
Q615 How concerned are you about the safety of air travel these days?

Aircraft Maintenance: Favorability and Awareness

Despite their level of concern about the safety of air travel, Americans are generally favorable about the maintenance of commercial aircraft. Using a 100-point thermometer scale, where 100 indicates “extremely positive feelings” and 1 indicates “extremely negative feelings”, the maintenance of commercial aircraft garners a mean rating of 66 from the general public and 70.1 from the DC Elite. The general public is slightly less favorable with a majority (58%) of responses falling between 31 and 70 whereas opinions among DC Elite are

more evenly divided with 45% giving a rating of 71-100 and 49% a rating of 31-70.

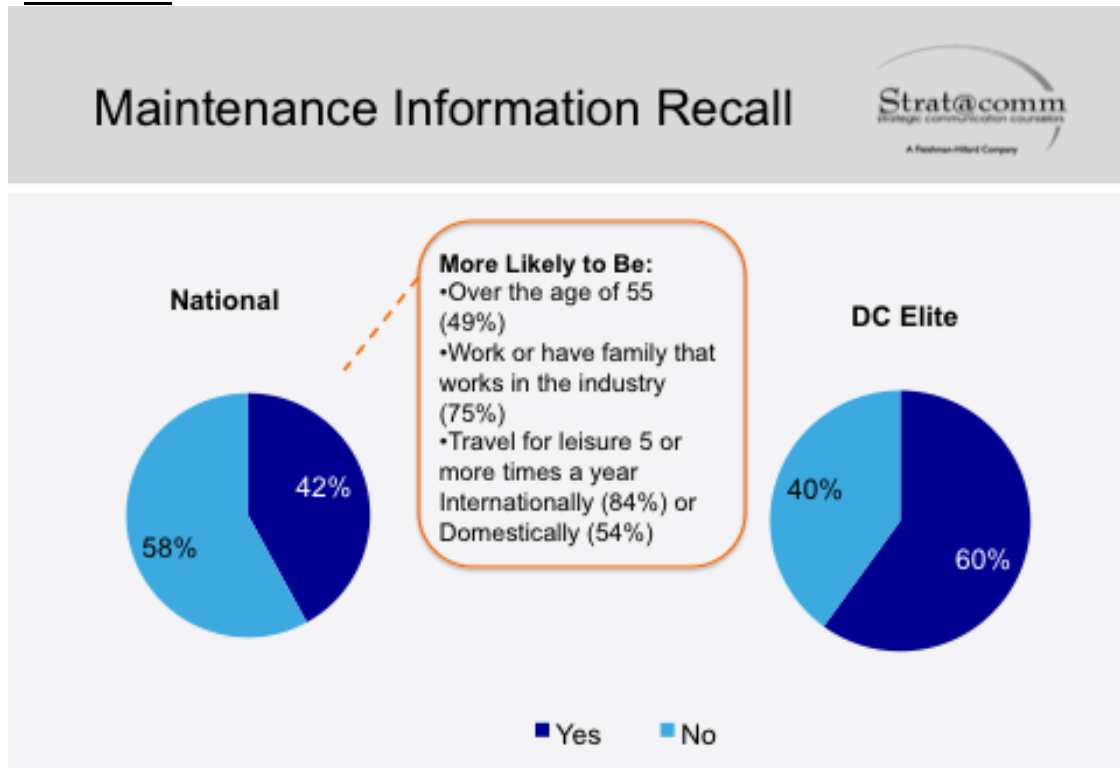
FIGURE 2



Q602 Thinking about the maintenance of commercial aircraft, based on what you may have heard or read, overall how would you rate your feelings about current state of quality and confidence you have in the maintenance of commercial aircraft? Please use a scale from 1 to 100, where a "100" means you are have extremely positive feelings about the current state of maintenance of commercial aircraft and a "1" means you have extremely negative feelings about the current status. If you are not sure, please enter 999.

Nearly half (42%) of the general public and a majority (60%) of DC Elite report that they are familiar with aircraft maintenance issues (i.e., aircraft maintenance or the people and companies responsible for maintenance).

FIGURE 3



Q605 Have you read, seen, or heard anything recently in the news, in advertisements, or from people you know about the maintenance of aircraft or the people and companies that are responsible for it?

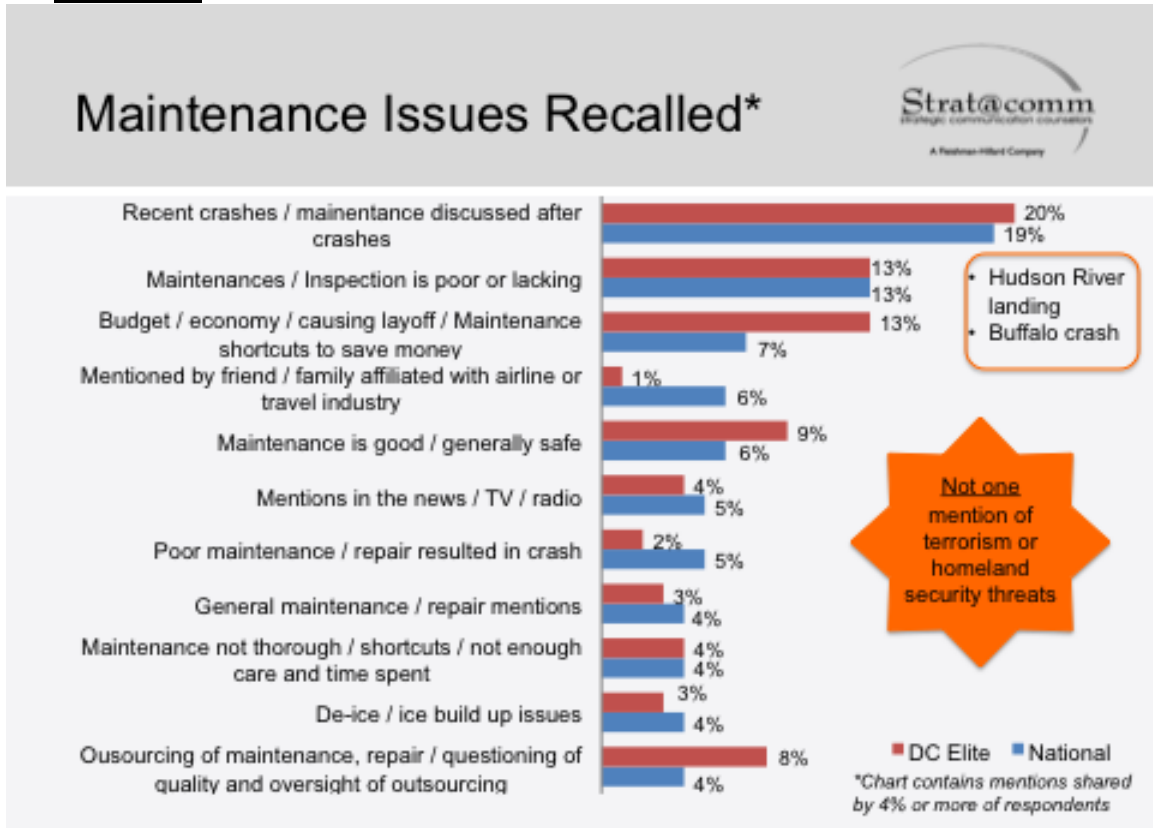
Individuals that recall reading, seeing or hearing information are more likely to be those who:

- Work or have family that works in the aviation industry (75%);
- Travel for leisure 5 or more times per year (84% international travel; 54% domestic travel); and
- Are over the age of 55.

When asked to articulate the specific information they recall, negative mentions (7 out of the top 11 mentioned categories) significantly outweigh neutral (2 out of the top 11 mentioned categories) and positive (2 out of the top 11 mentioned categories) mentions. The most frequently mentioned top-of-mind information recalled centers around recent crashes and poor maintenance, but does not include security or terrorism incidents or threats at all. It is important to note that this recall measure is heavily influenced by recent news coverage, including the US Airways landing on the Hudson River, and Continental crash in Buffalo.

As indicated below and a probable reflection of a greater familiarity with the industry, DC Elites are somewhat more likely than the general public to cite “maintenance shortcuts to save money” (13% vs. 7%), “outsourcing of maintenance/repair” (8% vs. 4%), and “maintenance is good/generally safe” (9% vs. 6%).

FIGURE 4



Q606 What have you read, seen or heard in the news, advertisements or from people you know about the maintenance of aircraft?

Favorability toward Industry Organizations

Across the board, the Federal Government and the domestic airlines earn the most positive favorability scores and thus positioning these entities as having the greatest potential as credible messengers.


When asked to assess their individual favorability toward a myriad of industry organizations, the National Transportation Safety Board (NTSB), domestic airlines, and the Federal Aviation Administration (FAA) receive the most positive ratings among both the general public and DC Elites.

Both the general public and DC Elites give moderate favorability ratings to the commercial airline industry (mean 60.3 general public; mean 64.5 DC Elites) , airline manufacturers (mean 59.5 general public; mean 64.8 DC Elites), and the foreign carriers (mean 51.8 general public; mean 66.3 DC Elites).

Roughly two thirds (61% general public; 68% DC Elite) report not being familiar enough with ARSA to rate the organization. Among the group able to evaluate ARSA, favorability is lukewarm with a mean score of 45 among the general public and 55.2 among DC elites.

Members of the general public and DC Elite are least familiar with and exhibit lukewarm favorability toward the bilateral partner civil air authorities: European Aviation Safety Agency (EASA) (mean 43 general public; mean 60.3 DC Elites), Directorate General of Civil Aviation of India (mean 32 general public; mean 40.7 DC Elites), and the Civil Aviation Administration of China (mean 28.6 general public; mean 42 DC Elites).

FIGURE 5



Favorability of Industry Organizations

	Mean		Not Familiar Enough to Rate	
	National	DC Elite	National	DC Elite
National Transportation Safety Board (NTSB)	66.5	73.4	17%	7%
Domestic airlines (i.e., United Airlines)	63.6	66.4	5%	--
Federal Aviation Administration (FAA)	63.5	69.6	12%	5%
Commercial airline industry in general	60.3	64.5	9%	3%
Manufacturers	59.5	64.8	16%	7%
Foreign airlines (i.e., Lufthansa Airlines)	51.8	66.3	27%	11%
General media	51.3	57	6%	3%
Independent aircraft maintenance companies	49.3	56.6	44%	47%
Aeronautical Repair Station Association (ARSA)	45	55.2	61%	68%
Trade unions (i.e., Teamsters)	44.6	51.9	17%	3%
Aviation trade media	44.3	55.9	50%	47%
European Aviation Safety Agency (EASA)	43	60.3	58%	53%
Directorate General of Civil Aviation of India	32	40.7	65%	70%
Civil Aviation Administration of China	28.6	42	63%	65%

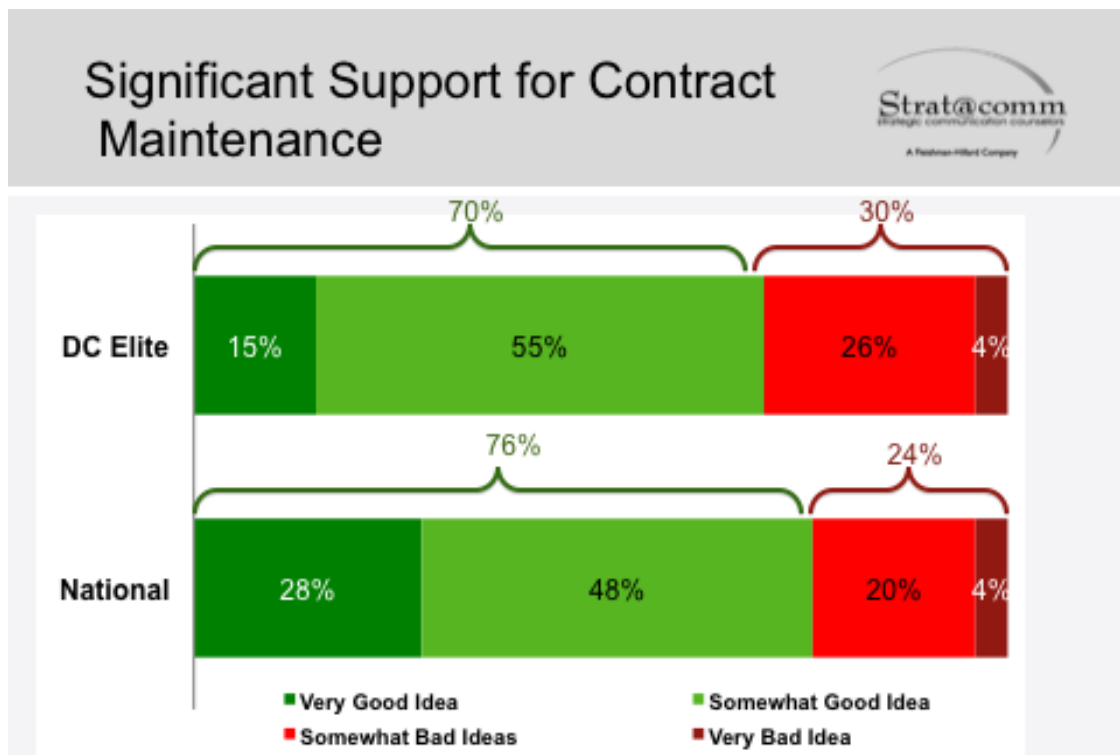
Q601 How favorable are you towards the following organizations? Please use a scale from 1 to 100, where a “100” means you are have extremely warm or positive feelings about that organization and a “1” means you have extremely cold or negative feelings about that organization. If you are not familiar with the organization, please enter 999.

Attitudes Toward Contract Maintenance

As a precursor to determining the ideal positioning for ARSA and its legislative agenda, it is first necessary to understand current attitudes toward contract maintenance and the supporting rationale. Effective positioning and messaging relies upon target audience members being able to “hear” the message. One’s receptivity to the message depends upon the degree to which the message resonates with and is meaningful to an individual.

Members of the general public and DC Elites are currently favorably disposed to the idea of contract maintenance. Among the general public, 70% say contract maintenance performed by FAA certified contractors is either a “good” or “very good” idea. Three in four (76%) of DC Elites concur. It is important to note, however, that this support is somewhat pliable – and therefore subject to attack -- with the preponderance of mentions being simply a “good” idea (rather than a “very good” idea).

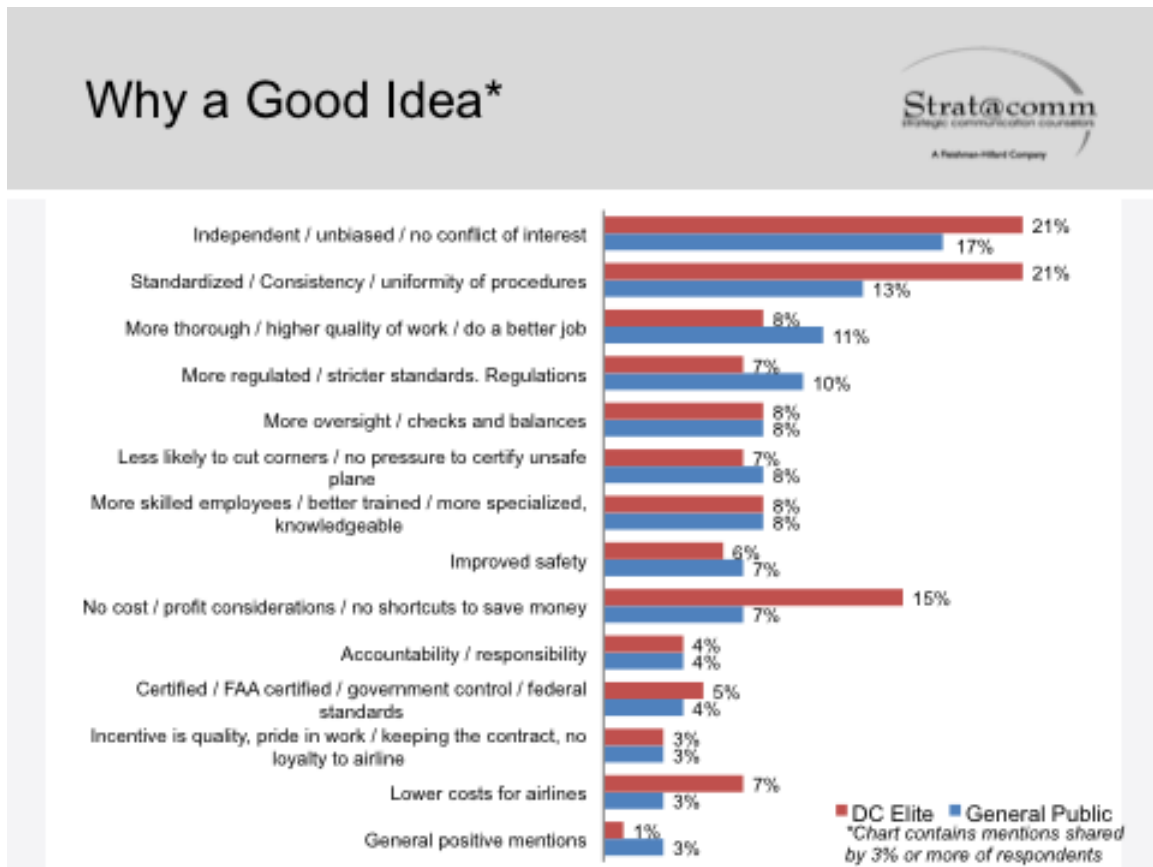
FIGURE 6



Q620 Many of the legacy airlines-such as United and American- have traditionally done their own aircraft maintenance. Now, aircraft maintenance is being performed by FAA certified contractors located across the country and the globe. Do you think that is a...

Supporters of contract maintenance cite “independence/unbiased/no conflict of interest” and “standardization/consistency/uniformity” as the primary rationale for their support. Additionally, DC Elite mention “lack of cost/profit considerations/no short cuts to save money” whereas the general public also highlights both “quality of work” and “stricter standards.”

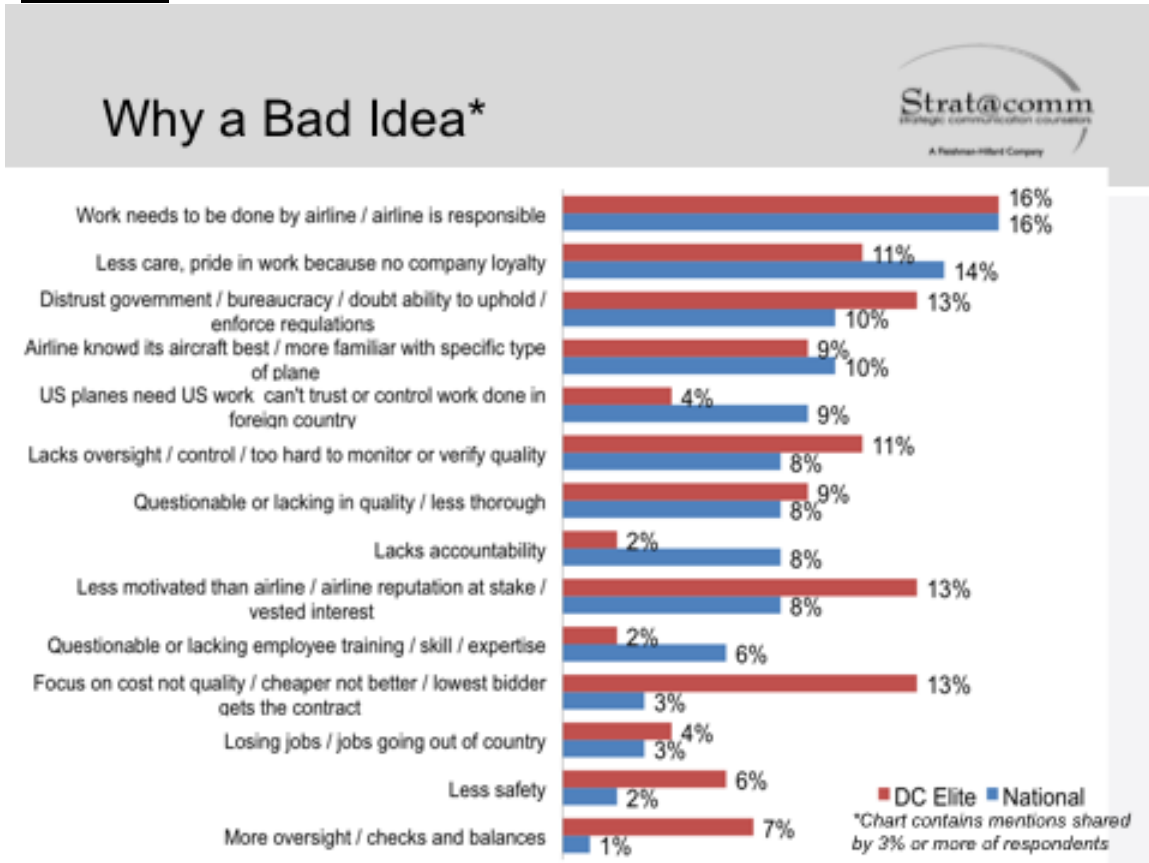
FIGURE 7



Q621 Why do you think that is a good idea?

Detractors focus on “airline accountability/responsibility,” “lack of pride due to lack of company loyalty,” “doubt government’s ability to uphold regulations,” and “airline knowledge of the specific aircraft” as their primary justification.

FIGURE 8



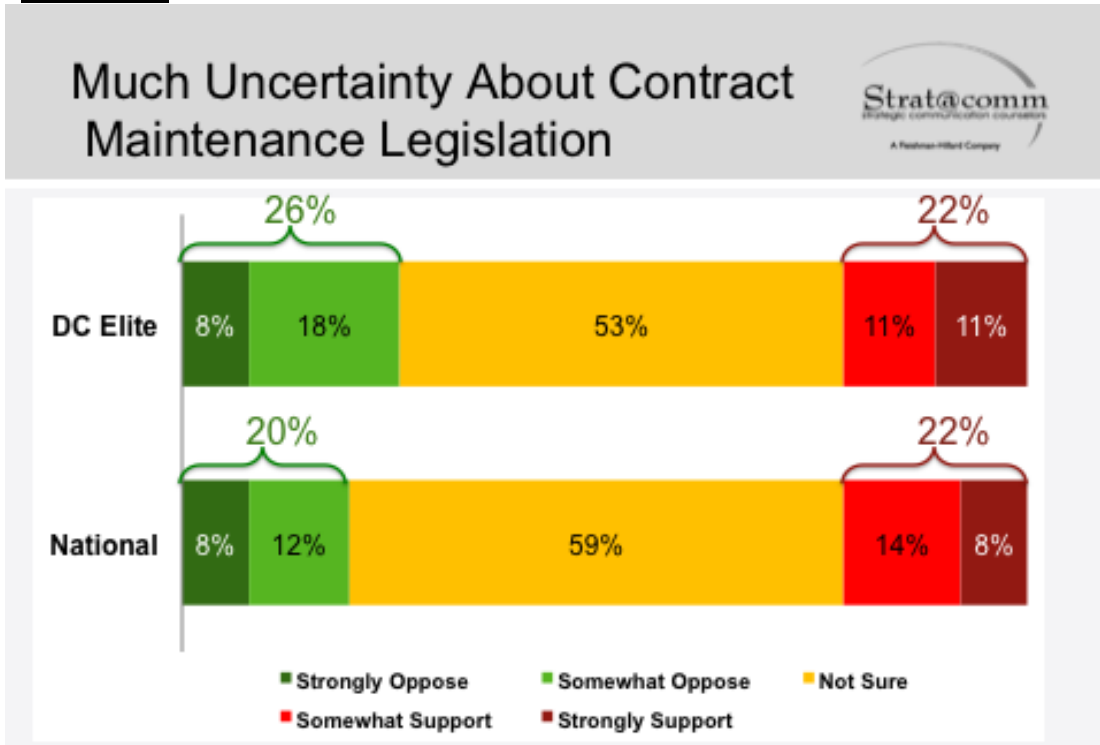
Support or Opposition of Potential

Q621 Why do you think that is a bad idea?

Legislation on Contract Maintenance: Pre Measure

Given the general level of existing support for contract maintenance, it is somewhat surprising that, when presented with the proposal under Congressional consideration that would make it more difficult for any US aircraft to be maintained by contract maintenance, most Americans (59% general public; 53% DC Elite) are initially *unsure* as to whether they would support or oppose the potential legislation. It is hypothesized that the proportion of those who are unsure is heavily influenced by the desire and need to know more about what the actual legislation would entail and the impact it would have. However, among those who do have an opinion, these opinions are equally split between support and opposition.

FIGURE 9



Q625 For years, owners of U.S. commercial and private aircraft have used maintenance contractors-in the U.S. and abroad- to service their aircraft. Congress is currently considering legislation that would make it much more difficult for any U.S. aircraft to be maintained by contract maintenance. Do you support or oppose this legislation?

Contract Maintenance Message Testing

Participants were presented with a series of 14 statements relevant to the aviation industry and contract maintenance and asked to describe the degree to which they agree or disagree with each statement. Note: these statements were constructed to test both the ARSA position as well as potential points of opposition.

Among both audiences, there are three messages that resonate most strongly:
[See Figure 10]

- Nearly all Americans agree (86% general public; 86% DC Elites) with the statement “Cargo air carriers such as FedEx and UPS have always used contract maintenance stations, allowing them the flexibility to get the maintenance they need when and where they need it, with the reliability required to ensure their delivery schedules.”
- A comparable proportion (85%) of DC Elites and slightly fewer (79% general public) agree that “The growing contract maintenance industry is

a source of stable, good paying jobs for skilled workers, and has absorbed hundreds of employees laid off by struggling air carriers.”

- Similarly, 83% of DC Elites and 76% of the general public agree that “Maintenance stations have been under the scrutiny of the government, airlines and the public for many years. These stations have demonstrated they have the specialized expertise and high-quality systems that ensure the best maintenance for the airlines and the flying public.”

A fourth message also resonates with both audiences, albeit less strongly: [See Figure 11]

- Seven in ten (72% DC Elites; 70% general public) agree that “The most financially stable airlines such as Southwest and JetBlue have never done all of their own maintenance. Using contract maintenance stations is one of the main reasons their business model is successful.”

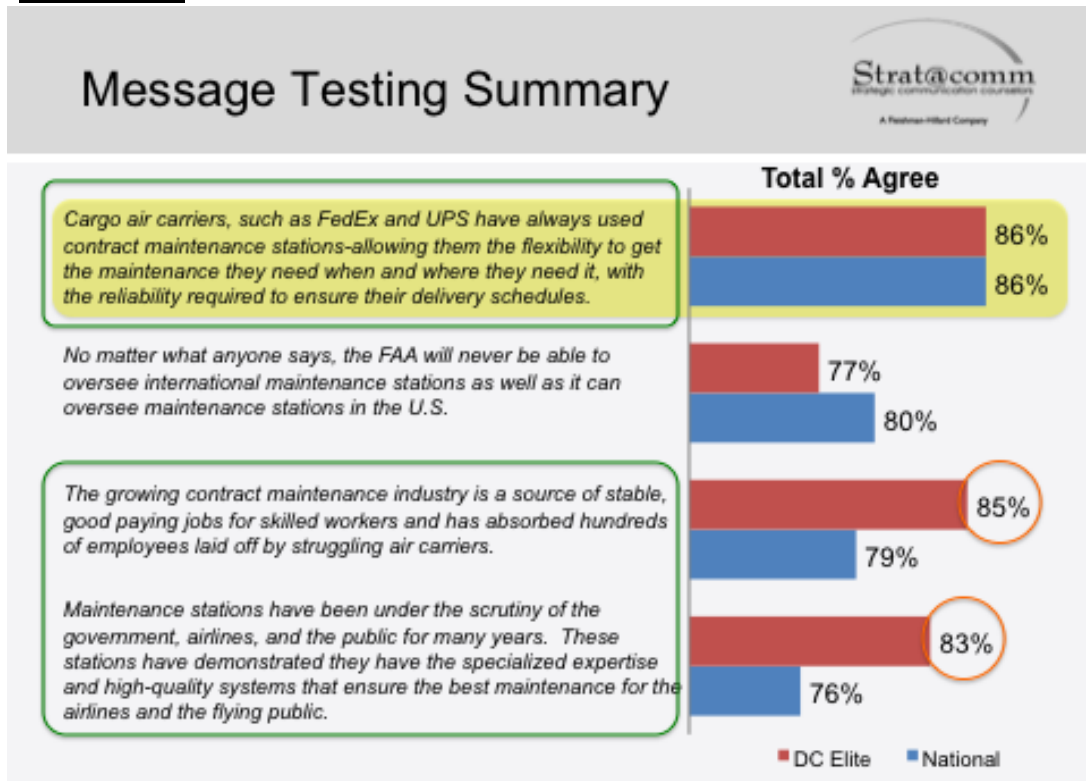
Members of the general public also respond well to: [See Figure 11]

- “Using international contract maintenance stations is just outsourcing – it sends US jobs overseas. Once the highly skilled aircraft and avionics technicians’ workforce is cut down, it will be virtually impossible to rebuild.” (74% general public agree; 62% DC Elite agree)
- “The fact that the safest period in the history of civil aviation had happened at the same time the major airlines have increased the amount of contract maintenance seems to be good evidence that contract maintenance is safe.” (72% general public agree; 64% DC Elite agree)

DC Elites also respond well to: [See Figure 12]

- “As long as international maintenance is performed under the same safety and certification standards as the US – including strict oversight by US and foreign governments – there should be no problem with having maintenance work done abroad.” (70% DC Elite agree; 62% general public agree)

FIGURE 10



Q700 Please review the following statements. After reviewing each statement, please indicate whether you agree or disagree.

FIGURE 11

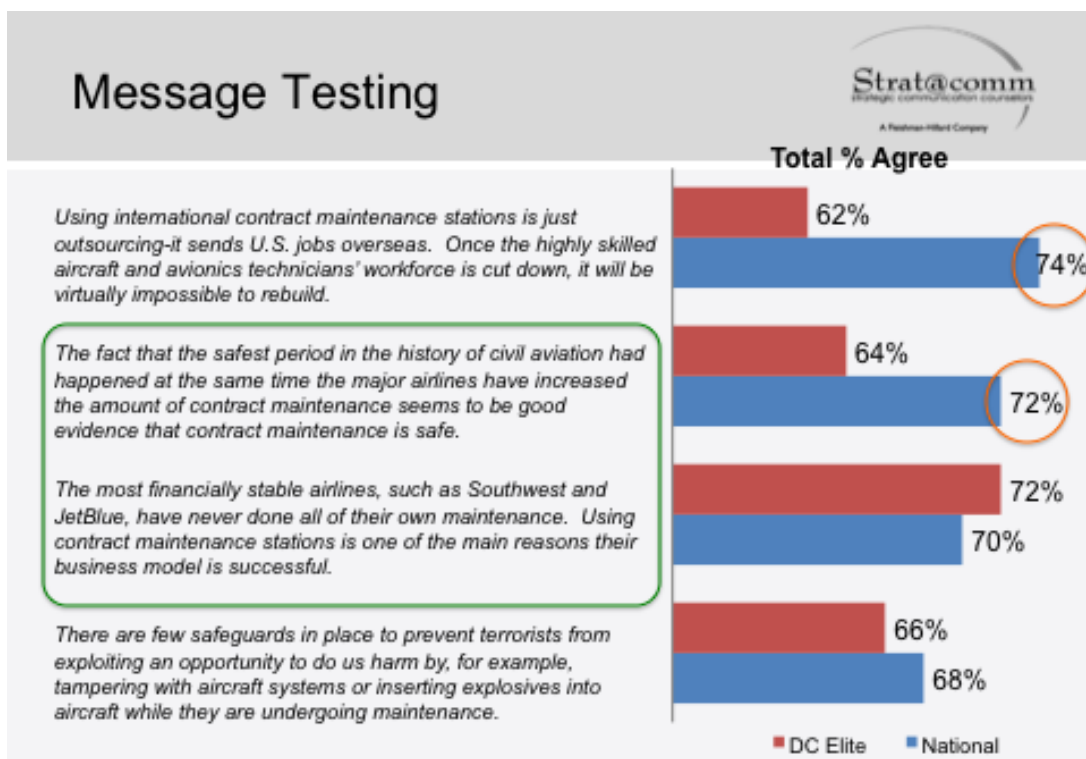


FIGURE 12

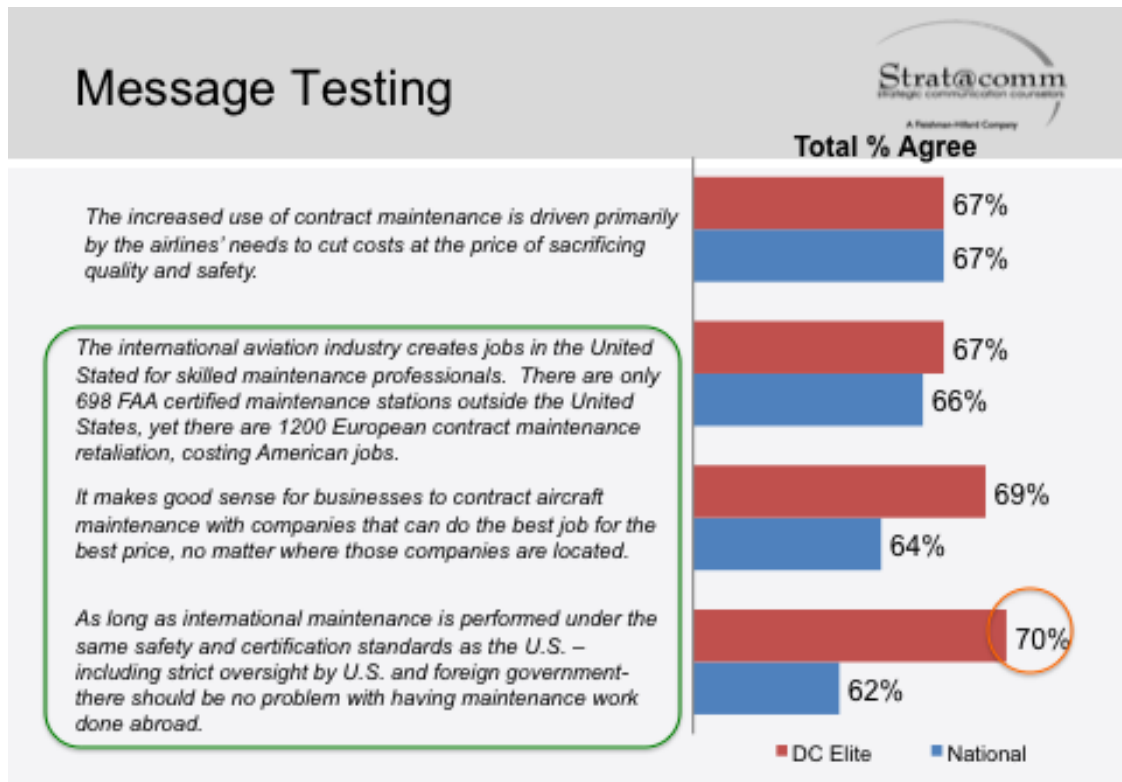
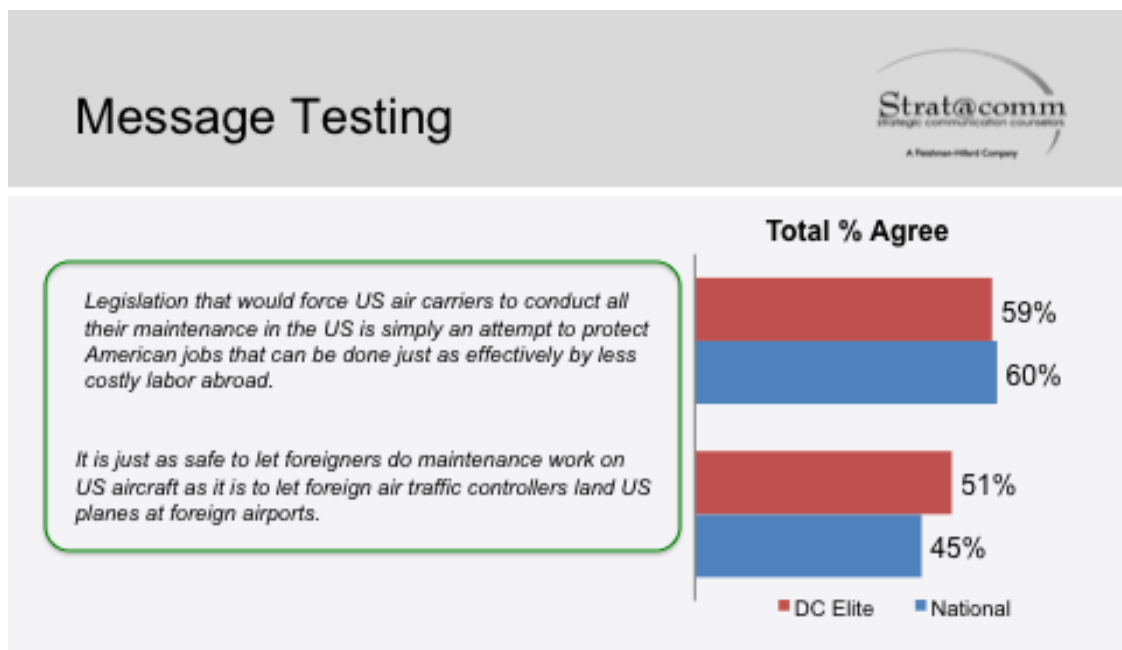


FIGURE 13



Message Testing: Support and Opposition

Table 1 (below) illustrates the general public subgroups most in support or opposition to the messages tested. General public subgroups analyzed include both demographic groups as well as attitudinal groups (e.g., favorable to the airlines). Percentages shown are the proportions of either total agree (support) or total disagree (oppose) the specific message. Only statistically significant differences (at the 95% confidence level) are shown. Statistical significance is calculated within the group (e.g., age, attitude toward the airlines, etc). Messages are grouped by those favorable to the ARSA position and those in opposition.

Highlights of this analysis include:

- One's existing attitudes about the current state of aircraft maintenance in general, independent aircraft maintenance companies, or toward contract maintenance (defined as either being a good idea or a bad idea) determines whether one responds favorably or unfavorably to the messages presented. Generally, individuals favorable toward the current state of aircraft maintenance, favorable toward independent aircraft maintenance companies and/or toward the idea of contract maintenance respond favorably to (agree with) messages they perceive as supportive.
- Overall favorability toward the airlines and overall favorability toward ARSA are also strong indicators of support.
- Neither concern about airline safety nor frequency of travel (business, leisure, domestic or international) has a consistent impact on how messages are viewed.
- There are no consistent demographic groups that support or oppose any of the messages.

Table 1
Message Testing
Support versus Opposition Groups

ARSA Messages	Support Groups (% Total Agree)	Opposition Groups (% Total Disagree)
<p>Cargo air carriers, such as FedEx and UPS have always used contract maintenance stations—allowing them the flexibility to get the maintenance they need, when and where they need it, with the reliability required to ensure their delivery schedules.</p>	<ul style="list-style-type: none"> • Republicans (90%) • Favorable to airlines (88.6%) • Contract maintenance good idea (88.5%) • Favorable to ARSA (87.6%) • Warm to maintenance of commercial aircraft (87.5%) 	<ul style="list-style-type: none"> • Cold to maintenance of commercial aircraft (25.8%) • Unfavorable to ARSA (25%) • Contract maintenance bad idea (23.9%) • Unfavorable to airlines (21.5%) • National Elites (17.5%) • Democrats (17%) • Independents (17%)
<p>The growing contract maintenance industry is a source of stable, good paying jobs for skilled workers and has absorbed hundreds of employees laid off by struggling air carriers.</p>	<ul style="list-style-type: none"> • Favorable to ARSA (90.8%) • Warm to maintenance of commercial aircraft (89.1%) • Favorable to independent aircraft maintenance companies (85.2%) • Contract maintenance good idea (82.7%) • Favorable to airlines (82.4%) 	<ul style="list-style-type: none"> • Cold to maintenance of commercial aircraft (41.3%) • Contract maintenance bad idea (34.9%) • Unfavorable to independent aircraft maintenance companies (33.8%) • Unfavorable to ARSA (32.1%) • Unfavorable to airlines (32%)
<p>Maintenance stations have been under the scrutiny of the government, airlines, and the public for many years. These stations have demonstrated they have the specialized expertise and high-quality systems that ensure the best maintenance for the airlines and the flying public.</p>	<ul style="list-style-type: none"> • Favorable to ARSA (88.7%) • Warm to maintenance of commercial aircraft (85.1%) • Contract maintenance good idea (81.6%) • National Non-Elites (78.3%) 	<ul style="list-style-type: none"> • Contract maintenance bad idea (41.8%) • Cold to maintenance of commercial aircraft (38.1%) • Unfavorable to ARSA (28.9%) • National Activists (28.8%)
<p>The fact that the safest period in the history of civil aviation has happened at the same time the major airlines have increased the amount of contract maintenance seems to be good evidence that contract maintenance is safe.</p>	<ul style="list-style-type: none"> • Favorable to ARSA (86.9%) • Warm to maintenance of commercial aircraft (79.5%) • Contract maintenance good idea (79.1%) • Favorable to airlines (77.3%) • 1-4 domestic leisure trips (75%) • No international business trips (73%) • 1-4 international business trips (67%) 	<ul style="list-style-type: none"> • Contract maintenance bad idea (50.7%) • Cold to maintenance of commercial aircraft (42.4%) • Unfavorable to ARSA (38.7%) • Unfavorable to airlines (35.8%) • No domestic leisure travel (33%) • National Activist (31.8%) • National Non-Elites (27.8%)

Table 1 Message Testing Support versus Opposition Groups		
ARSA Messages	Support Groups (% Total Agree)	Opposition Groups (% Total Disagree)
The most financially stable airlines, such as Southwest and JetBlue, have never done all of their own maintenance. Using contract maintenance stations is one of the main reasons their business model is successful.	<ul style="list-style-type: none"> • Warm to maintenance of commercial aircraft (75.4%) • Contract maintenance good idea (75.3%) • Favorable to airlines (75%) • Men (73%) • National Non-Elites (72%) • No international business travel (71%) 	<ul style="list-style-type: none"> • Contract maintenance bad idea (48.7%) • Cold to maintenance of commercial aircraft (44.4%) • 1-4 International business trips (41%) • Unfavorable to airlines (40.9%) • National Activist (35.5%) • Women (33.9%)
The international aviation industry creates jobs in the United States for skilled maintenance professionals. There are only 698 FAA certified maintenance stations outside the United States; yet there are 1200 European contract maintenance stations in the U.S. Inhibiting the maintenance of U.S. aircraft abroad could trigger international retaliation, costing Americans jobs.	<ul style="list-style-type: none"> • 35-54 (71.7%) • No domestic travel (72%) • Contract maintenance good idea (68.7%) 	<ul style="list-style-type: none"> • 5+ Domestic leisure trips (43%) • Contract maintenance bad idea (42.7%) • 55+ (39%)
It makes good sense for businesses to contract aircraft maintenance with companies that can do the best job for the best price no matter where those companies are located.	<ul style="list-style-type: none"> • Men (70%) • Contract maintenance good idea (69.3%) • Warm to maintenance of commercial aircraft (68.6%) • National Non-Elites (67.4%) 	<ul style="list-style-type: none"> • Contract maintenance bad idea (53.5%) • Cold to maintenance of commercial aircraft (47.2%) • National Activist (43.5%) • Women (42.2%) • National Elites (41.2%)
As long as international maintenance is performed under the same safety and certification standards as the U.S.—including strict oversight by U.S. and foreign government—there should be no problem with having maintenance work done abroad.	<ul style="list-style-type: none"> • Warm to maintenance of commercial aircraft (69.4%) • 18-34 (68.7%) • Contract maintenance good idea (68.5%) • Men (68%) • Favorable to airlines (66.4%) 	<ul style="list-style-type: none"> • Contract maintenance bad idea (57.8%) • Cold to maintenance of commercial aircraft (52.3%) • Unfavorable to airlines (48.1%) • Women (43.2%) • 55+ (43%) • Airline safety concern (40.8%)

Table 1 Message Testing Support versus Opposition Groups		
ARSA Messages	Support Groups (% Total Agree)	Opposition Groups (% Total Disagree)
Legislation that would force US air carriers to conduct all their maintenance in the US is simply an attempt to protect American jobs that can be done just as effectively by less costly labor abroad.	<ul style="list-style-type: none"> • Favorable to ARSA (73.3%) • Warm to maintenance of commercial aircraft (67.6%) • 18-34 (64.2%) • Men (63%) • National Non-Elites (62.1%) • Contract maintenance good idea (62%) 	<ul style="list-style-type: none"> • Contract maintenance bad idea (47.8%) • Cold to maintenance of commercial aircraft (56%) • National Activist (46.8%) • Unfavorable to ARSA (45.5%) • 55+ (45%) • Women (44%)
It is just as safe to let foreigners do maintenance work on US aircraft as it is to let foreign air traffic controllers land US planes at foreign airports.	<ul style="list-style-type: none"> • No airline safety concern (54%) • 18-34 (52.3%) • Democrats (51%) • Contract maintenance good idea (48.4%) • National Non-Elite (47.7%) • Independents (47%) 	<ul style="list-style-type: none"> • Contract maintenance bad idea (64.5%) • Republicans (64%) • 55+ (60%) • National Activists (60%) • Airline safety concern (57.9%)

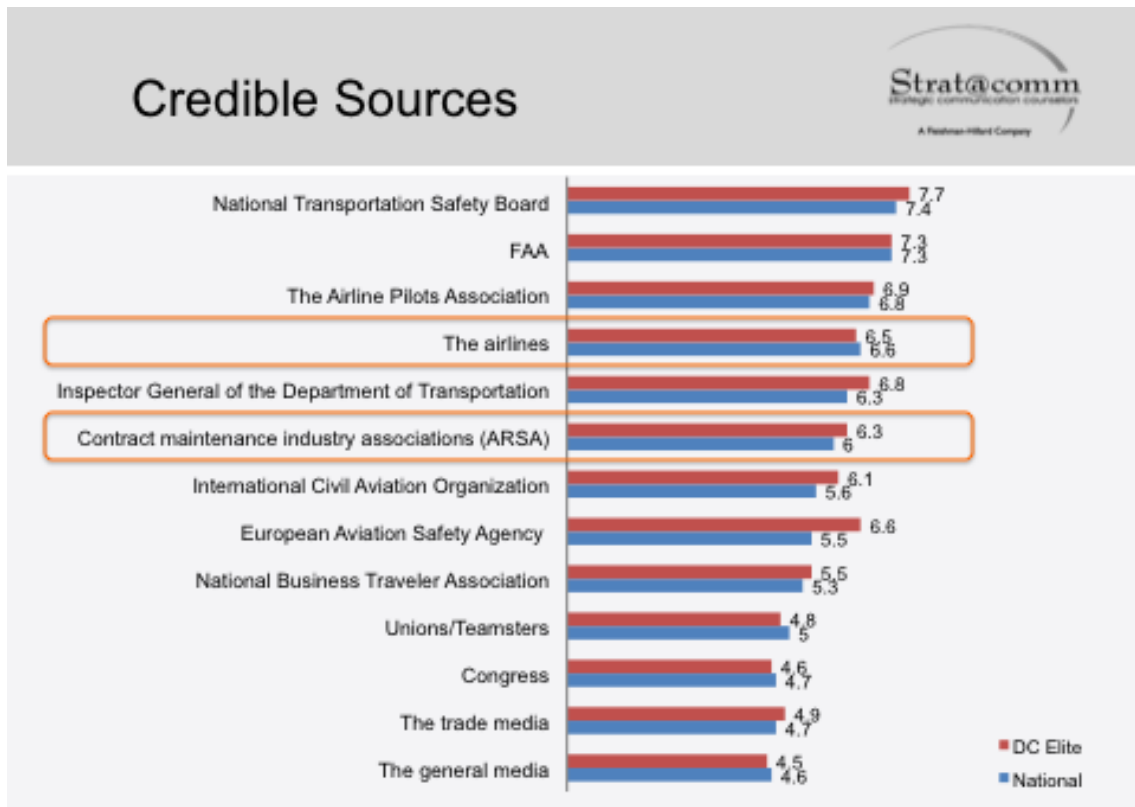
Opposition Messages	Support Groups (% Total Agree)	Opposition Groups (% Total Disagree)
<p><i>No matter what anyone says, the FAA will never be able to oversee international maintenance stations as well as it can oversee maintenance stations in the U.S.</i></p>	<ul style="list-style-type: none"> • <i>Contract maintenance bad idea (86.2%)</i> • <i>Favorable to independent aircraft maintenance companies (86.1%)</i> • <i>Favorable to airlines (85.9%)</i> • <i>Republicans (85%)</i> • <i>35-54 (83.3%)</i> • <i>55+ (82%)</i> 	<ul style="list-style-type: none"> • <i>Unfavorable to independent aircraft maintenance companies (25.7%)</i> • <i>18-34 (25.6%)</i> • <i>Democrats (23%)</i> • <i>Contract maintenance good idea (21.6%)</i>
<p><i>The increased use of contract maintenance is driven primarily by the airlines' needs to cut costs at the price of sacrificing quality and safety.</i></p>	<ul style="list-style-type: none"> • <i>Contract maintenance bad idea (76.5%)</i> • <i>Unfavorable to airlines (73.3%)</i> • <i>Favorable to unions (72.8%)</i> • <i>Democrats (72%)</i> • <i>Have airline safety concerns (71.2%)</i> • <i>Cold to maintenance of commercial aircraft (70.8%)</i> 	<ul style="list-style-type: none"> • <i>Warm to maintenance of commercial aircraft (40.6%)</i> • <i>Unfavorable to unions (40.3%)</i> • <i>Favorable to airlines (40.2%)</i> • <i>Republicans (38%)</i> • <i>Independents (37%)</i> • <i>Contract maintenance good idea (36.6%)</i>
<p><i>There are few safeguards in place to prevent terrorists from exploiting an opportunity to do us harm by, for example, tampering with aircraft systems or inserting explosives into aircraft while they are undergoing maintenance.</i></p>	<ul style="list-style-type: none"> • <i>Informed National (82.2%)</i> • <i>Unfavorable to ARSA (75.9%)</i> • <i>Have airline safety concerns (72.2%)</i> • <i>35-54 (73.4%)</i> • <i>55+ (70%)</i> 	<ul style="list-style-type: none"> • <i>No airline safety concerns (43.5%)</i> • <i>18-34 (40.3%)</i> • <i>Favorable to ARSA (39.5%)</i> • <i>National Non-Elites (34.1%)</i> • <i>National Activist (31.2%)</i>
<p><i>Using international contract maintenance stations is just outsourcing—it sends U.S. jobs overseas. Once the highly skilled aircraft and avionics technicians' workforce is cut down, it will be virtually impossible to rebuild.</i></p>	<ul style="list-style-type: none"> • <i>Favorable to unions (81.1%)</i> • <i>Contract maintenance bad idea (80.1%)</i> • <i>Have airline safety concerns (77.8%)</i> • <i>55+ (77%)</i> • <i>35-54 (76.7%)</i> 	<ul style="list-style-type: none"> • <i>No airline safety concerns (35.3%)</i> • <i>18-34 (31.9%)</i> • <i>Unfavorable to unions (28.2%)</i> • <i>Contract maintenance good idea (27.6%)</i>

Source Credibility

Delivering a message that resonates with the target audience is only half the battle; the *messenger* must also be credible in order for the message to have the greatest impact. Credibility, of course, occurs in the eyes of the beholder.

Consistent with the previously reported favorability ratings, results indicate that the National Transportation Safety Board (NTSB) and the Federal Aviation Administration (FAA) have the most credibility in delivering messages regarding contract maintenance. Perceived as more moderately credible are The Airline Pilots Association, the airlines themselves, and contract maintenance industry associations such as the Aeronautical Repair Station Association (ARSA).

FIGURE 14



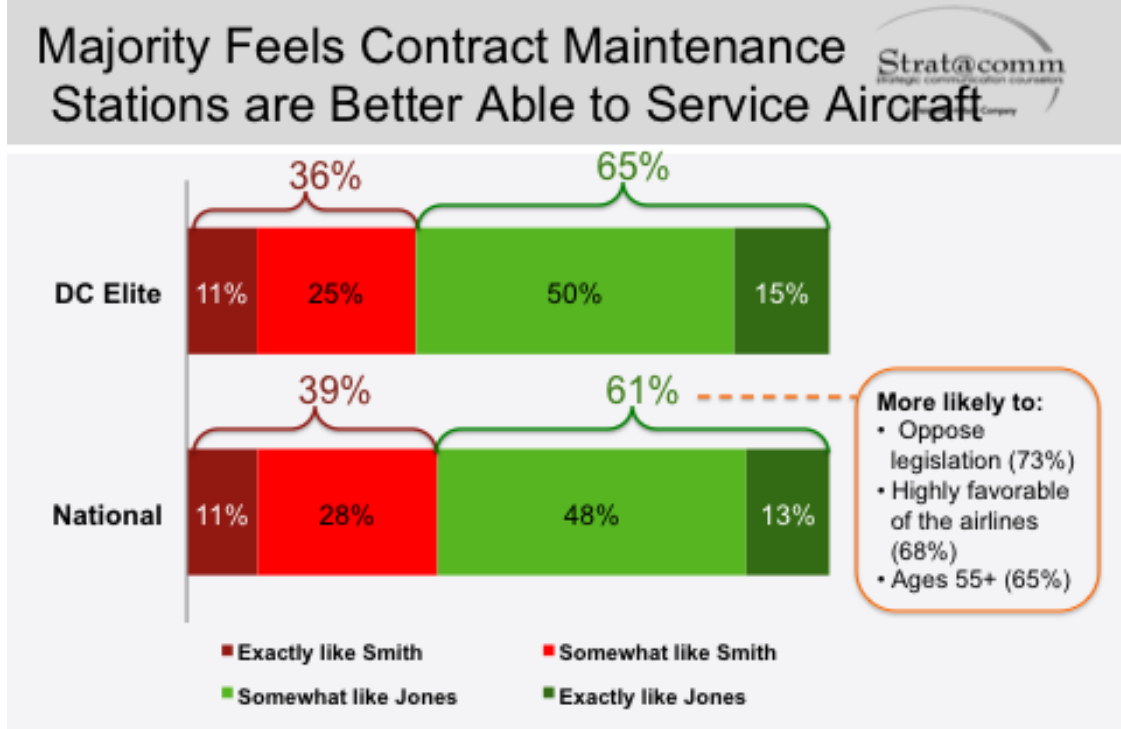
Q705 Thinking about all the messages you just reviewed, please rate the following groups or organizations on a scale from 1 to 10, where a 10 means you feel that group or organization has the utmost credibility on the issue of contract maintenance of aircraft, and a 1 means you felt that group or organization has no credibility at all.

Positioning Polarizations

In order to obtain an assessment of overall messaging *themes*, a series of hypothetical statements were presented, representing opposing points of view. These points of view are juxtaposed, and respondents are asked with which point of view they most closely identify. For ease of response, each point of view represents either “Smith” or “Jones”. Note: ARSA’s point of view is represented as Jones in each scenario.

A majority of both the general public and DC Elites (61% and 65%, respectively) identify with the ARSA [Jones] point of view that “contract maintenance stations are better able to service aircraft because that is all they do. While the major airlines have several aspects to their business, contract maintenance companies benefit from having one mission: insuring aircraft safety.” In contrast, others [those who support the Smith point of view] “feel that commercial airlines should be required to conduct all of their own maintenance because they are the most able and responsible. That is the only way to control the quality of maintenance of the aircraft, and the extra costs to their airlines are well worth it.” (39% general public; 36% DC Elites)

FIGURE 15

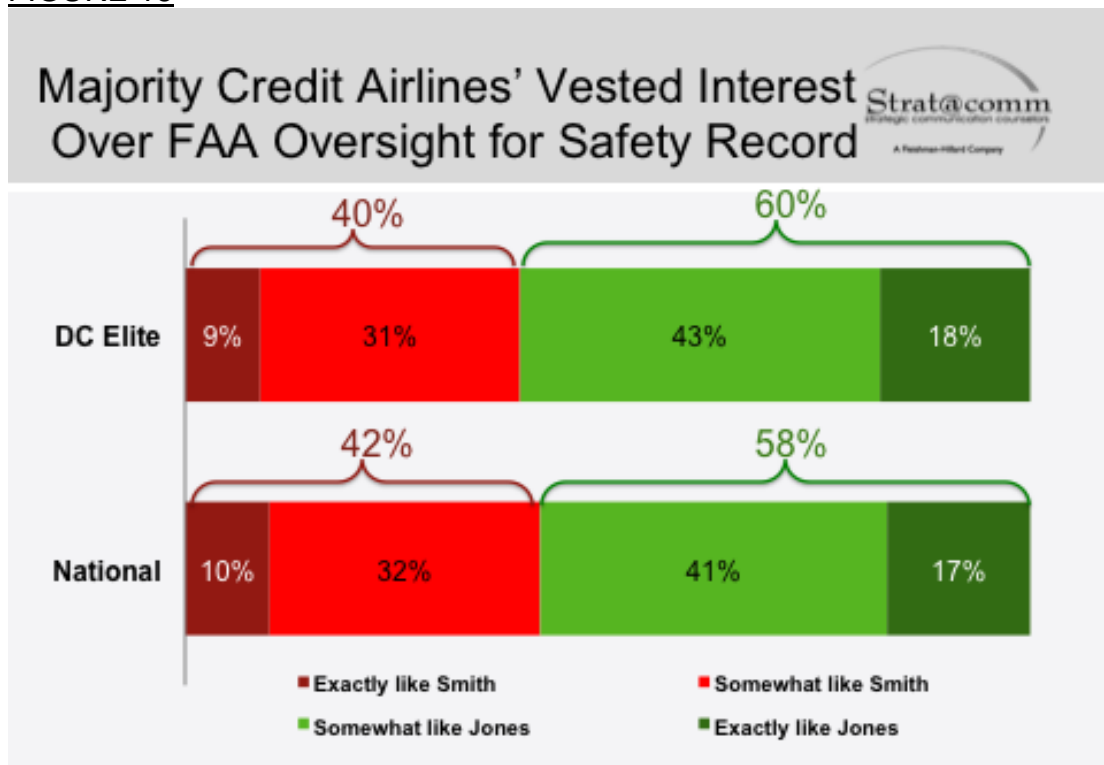


Q752 SMITH feels that commercial airlines should be required to conduct all of their own maintenance because they are the most able and responsible. Smith knows that is the only way to control the quality of maintenance of the aircraft, and believes the extra costs to the airlines are well worth it.

JONES believes that contract maintenance stations are better able to service aircraft, because that's all they do. Jones knows that major airlines have several aspects to their business, contract maintenance companies benefit from having one mission: insuring aircraft safety.

A majority of each sample group supports the [Jones] point of view that “air travel today is safe because the airlines have so much at stake in making sure their planes are safe to fly” (58% general public; 61% DC Elite). In contrast, the remaining four in ten (42% general public; 40% DC Elite) [support the Smith point of view] believe that “the major reason air travel is so safe today is because the FAA does a good job overseeing maintenance operations.”

FIGURE 16



Q750 SMITH believes the major reason air travel is so safe today is because the FAA does a good job overseeing maintenance operations.

JONES believes the major reason air travel is so safe today is because the airlines and companies that operate them have so much at stake in making sure their planes are safe to fly.

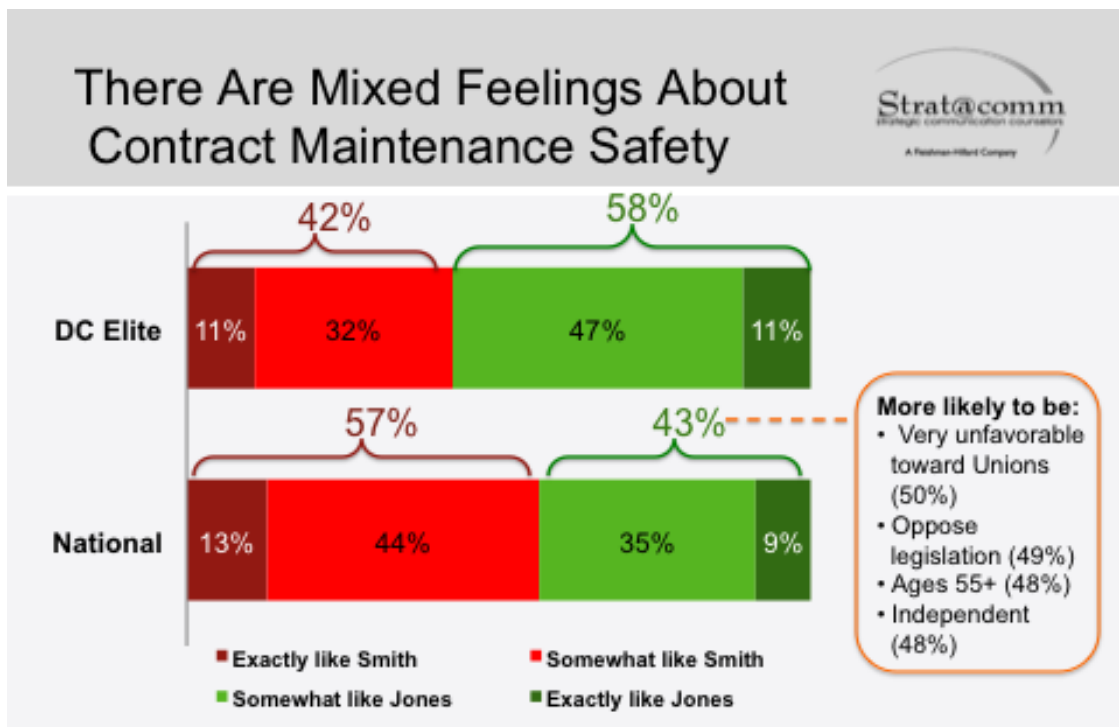
The general public and DC Elites have opposing opinions when it comes to the safety of international contract maintenance stations.

- Fifty-seven percent (57%) of the general public [support the Smith perspective] believe that “International contract maintenance stations

provide terrorists with an easy opportunity to sabotage US aircraft without setting foot on American soil. Different background check and drug use testing standards mixed with too few FAA inspections make international contract maintenance stations a tremendous threat to homeland security.” Four in ten (42%) of DC Elites have the same point of view.

- In contrast, fifty-eight percent (58%) of DC Elites [support the Jones perspective] believe that “International contract maintenance stations are just as safe as airline maintenance shops. International contract maintenance stations are certified and audited by the FAA and/or US bilateral partner civil air authorities. These stations, which also serve air carriers from other countries, undergo an average of 74 audits each year by the government, airlines, and independent third parties – reinforcing their safety procedures and greatly minimizing any potential threat to homeland security.” Four in ten (43%) of the general public have the same point of view.

FIGURE 17

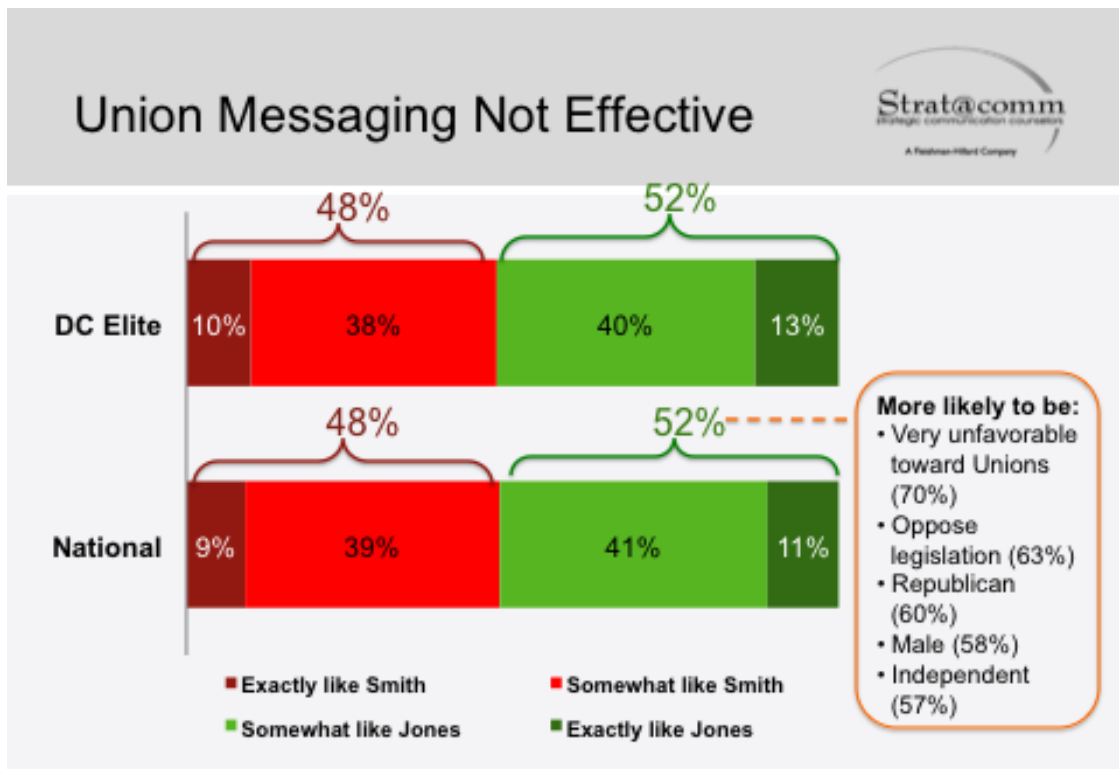


Q760 SMITH believes that international contract maintenance stations provide terrorists with an easy opportunity to sabotage U.S. aircraft without setting foot on American soil. Different background check and drug use testing standards mixed with too few FAA inspections make international contract maintenance stations a tremendous threat to homeland security.

JONES believes that international contract maintenance stations are just as safe as airline maintenance shops. International contract maintenance stations are certified and audited by the FAA and/or U.S. bilateral partner civil air authorities. These stations, which also serve air carriers from other countries, undergo an average of 74 audits a year each by the government, airlines, and independent third parties—reinforcing their safety procedures and greatly minimizing any potential threat to homeland security.

Opinions are nearly evenly divided between support of and opposition to arguments made by the labor unions. A slim majority of the general public and DC Elites (52% each) believe [Jones point of view] that “Attacks on the contract maintenance industry are simply attempts to increase labor unions’ bottom lines and preserve the benefits they’ve enjoyed, at the expense of the airline industry’s ability to be successful in the global marketplace.” The balance – 48% -- [Smith point of view] “agree with the labor unions: contract maintenance stations are nothing more than outsourced jobs, used only to reduce costs to the airlines and keep them competitive in the global market.”

FIGURE 18



Q765 SMITH agrees with the labor unions: contract maintenance stations are nothing more than outsourced jobs, used only to reduce the costs to the airlines and keep them competitive in the global market.

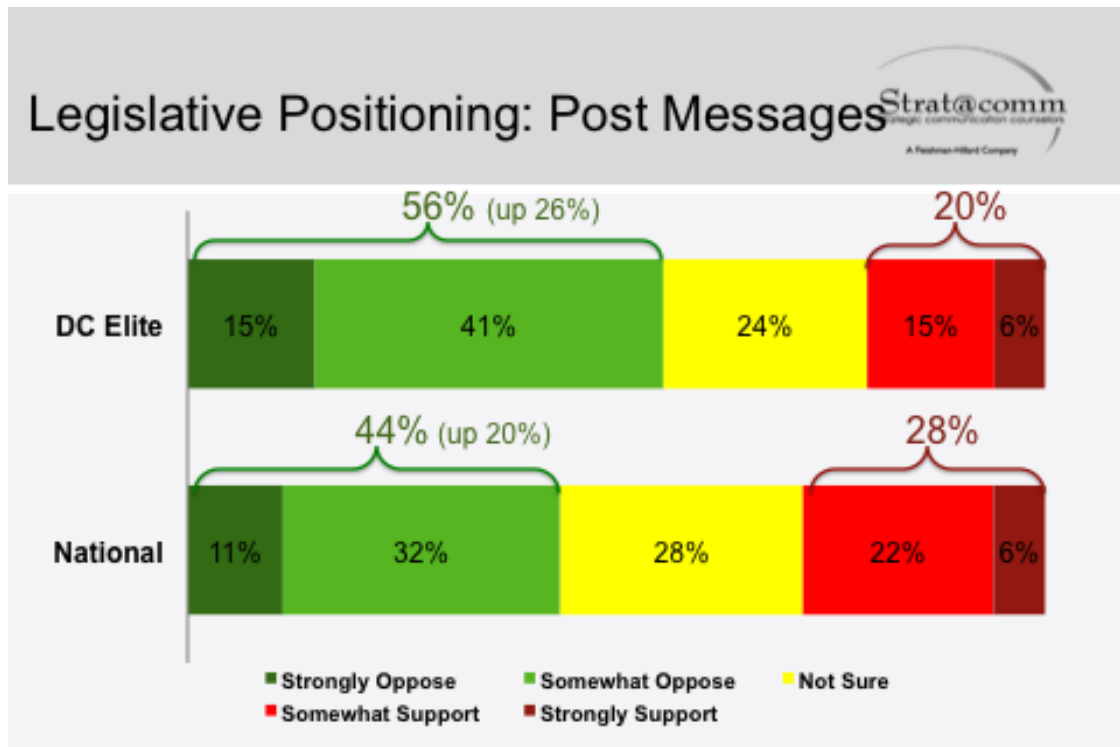
JONES believes that attacks on the contract maintenance industry are simply attempts to increase labor unions’ bottom lines and preserve the benefits they’ve enjoyed, at the expense of the airline industry’s ability to be successful in the global market.

***Support or Opposition of Potential Legislation on Contract Maintenance:
Post Measure***

In an effort to understand the impact of the information provided throughout the survey, respondents were asked to provide a second measure of their support or opposition to the potential legislation regarding contract maintenance.

Once Americans are exposed to messages and facts related to contract maintenance, they are significantly more likely to have an opinion about the legislation and its impact. “Unsure” proportions declined to roughly one-in-four (28% general public; 24% DC Elites), down from 59% and 53% respectively. Most of the shift occurs in those who now oppose legislation making it more difficult for any US aircraft to be maintained by contract maintenance. The post measure indicates that a majority of DC Elites (56%) and a plurality (44%) of the general public oppose the legislation following exposure to information. This represents a net change of 26 and 20 percentage points, respectively. Support for the legislation remains largely unchanged (28% general public; 20% DC Elite).

FIGURE 19



Q770 Now that you have more information about aircraft maintenance, please answer the following question, which was asked earlier.

For years, owners of U.S. commercial and private aircraft have used maintenance contractors—in the U.S. and abroad—to service their aircraft. Congress is currently considering legislation that would make it much more difficult for any U.S. aircraft to be maintained by contract maintenance. Do you support or oppose this legislation?

In this post measure, the demographic groups most likely to *oppose* the potential legislation that would make it much more difficult for any US aircraft to be maintained by contract maintenance are:

- National Informed (62%)
- Frequent (54%) and moderate (46%) domestic leisure travelers
- Those without airline safety concerns (52%)
- Those favorable toward the airlines (50.8%)
- Those unfavorable toward the unions (50.5%)
- Those warm toward maintenance of commercial aircraft (50.1%)
- Republicans (50%)
- Independents (48%)

- Those favorable toward independent aircraft maintenance companies (46.3%)
- Contract maintenance good idea (46.1%)

Subgroups most likely to *support* the potential legislation include:

- Those favorable toward the unions (45.3%)
- Contract maintenance bad idea (42%)
- National Elites (33.9%)
- Moderate international leisure travelers (33%)
- National Activists (33.3%)
- 55+ (31%)
- Those with airline safety concerns (30.4%)

V APPENDIX

Interview Schedule 3/10/09

Completes: 1,007 General Public
152 DC Elites
Margin of Error: + 3.1 at 95% confidence for General Public
+ 7.9 at 95% confidence for DC Elites
Field Dates: February 23 – March 2, 2009

600 GENERAL THERMOMETER BENCHMARKS

601 How favorable are you towards the following organizations? Please use a scale from 1 to 100, where a “100” means you are have extremely warm or positive feelings about that organization and a “1” means you have extremely cold or negative feelings about that organization. If you are not familiar with the organization, please enter 999.

MEAN SUMMARY		
National	DC Elite	
66.5	73.4	National Transportation Safety Board (NTSB)
63.6	66.4	Domestic airlines (i.e., United Airlines)
63.4	69.6	Federal Aviation Administration (FAA)
60.3	64.5	Commercial airline industry in general
59.5	64.8	Manufacturers
51.8	66.3	Foreign airlines (i.e., Lufthansa Airlines)
51.3	57	General media
49.3	56.6	Independent aircraft maintenance companies
45	55.2	Aeronautical Repair Station Association (ARSA)
44.6	51.9	Trade unions (i.e., Teamsters)
44.3	55.9	Aviation trade media
43	60.3	European Aviation Safety Agency (European FAA equivalent)
32	40.7	Directorate General of Civil Aviation of Indian (India's FAA)
28.6	42	Civil Aviation Administration of China (Chinese FAA equivalent)

NOT FAMILIAR ENOUGH SUMMARY		
National	DC Elite	
65%	70%	Directorate General of Civil Aviation of Indian (India's FAA)
63%	65%	Civil Aviation Administration of China (Chinese FAA equivalent)
61%	68%	Aeronautical Repair Station Association (ARSA)
58%	53%	European Aviation Safety Agency (European FAA equivalent)

50%	47%	Aviation trade media
44%	47%	Independent aircraft maintenance companies
27%	11%	Foreign airlines (i.e., Lufthansa Airlines)
17%	7%	National Transportation Safety Board (NTSB)
17%	3%	Trade unions (i.e., Teamsters)
16%	7%	Manufacturers
12%	5%	Federal Aviation Administration (FAA)
9%	3%	Commercial airline industry in general
6%	3%	General media
5%	--	Domestic airlines (i.e., United Airlines)

- 602 Thinking about the maintenance of commercial aircraft, based on what you may have heard or read, overall how would you rate your feelings about current state of quality and confidence you have in the maintenance of commercial aircraft? Please use a scale from 1 to 100, where a “100” means you are have extremely positive feelings about the current state of maintenance of commercial aircraft and a “1” means you have extremely negative feelings about the current status. If you are not sure, please enter 999.

Commercial aircraft – airlines such as United, Southwest, Lufthansa AND cargo lines such as FedEx and UPS

National	DC Elite	
23%	32%	TOP 2 BOX (81 – 100)
11%	13%	91 – 100 (NET)
12%	18%	81 – 90 (NET)
25%	24%	71 – 80 (NET)
9%	13%	61 – 70 (NET)
5%	8%	51 – 60 (NET)
17%	12%	41 – 50 (NET)
3%	4%	31 – 40 (NET)
4%	1%	21 – 30 (NET)
4%	5%	BOTTOM 2 BOX (1 – 20)
2%	1%	11 – 20 (NET)
2%	3%	1 – 10 (NET)
66	70.1	MEAN

- 605 Have you read, seen or heard anything recently in the news, in advertisements, or from people you know about the maintenance of aircraft or the people and companies that are responsible for it?

National	DC Elites	
42%	60%	Yes
58%	40%	No

[ASK Q606 IF Q605 = Yes]

- 606 What have you read, seen or heard in the news, advertisements or from people you know about the maintenance of aircraft?

National	DC Elite	
19%	20%	Recent crashes / maintenance discussed after crashes
13%	13%	Maintenances / Inspection is poor or lacking
7%	13%	Budget / economy / causing layoff / Maintenance shortcuts to save money
6%	9%	Maintenance is good / generally safe
6%	1%	Mentioned by friend / family affiliated with airline or travel industry
5%	2%	Poor maintenance / repair resulted in crash
5%	4%	Mentions in the news / TV / radio
4%	8%	Outsourcing of maintenance, repair / questioning of quality and oversight of outsourcing
4%	3%	De-ice / ice build up issues
4%	4%	Maintenance not thorough / shortcuts / not enough care and time spent
4%	3%	General maintenance / repair mentions
3%	2%	Tight regulations / more stringent requirements
3%	--	Aging fleets / maintenance and repair issues with older planes
3%	3%	Maintenance not frequent / timely enough
2%	--	Planes rushed back into service / problems not resolved before flights
2%	--	Bird strikes / controlling birds
2%	8%	Specific airline / plane manufacturer mentions
2%	1%	Interior cleaning and maintenance
2%	--	Carelessness / lazy, slacking employees
2%	1%	Unskilled workers / poor training / incompetence
2%	2%	Grounded / fines / failed inspections
1%	1%	Maintenance employees are very skilled / well trained
1%	2%	Maintenance is thorough / timely
1%	1%	Compromised safety
1%	2%	Poor FAA oversight / too cozy with airlines / cover ups and lax standards
1%	1%	Replacement parts / shoddy parts
1%	--	Concorde crash / caused by poor maintenance
1%	3%	Congressional hearings / Sully testimony
*	1%	Maintenance not to blame for crashes
8%	13%	Other mentions
6%	2%	Nothing
3%	2%	Don't remember

615 How concerned are you about the safety of air travel these days?

National	DC Elites	
73%	61%	Concerned (NET)
32%	26%	Very concerned
41%	35%	Somewhat concerned
27%	39%	Not Concerned (NET)
22%	34%	Not very concerned
6%	5%	Not at all concerned

620 Many of the legacy airlines—such as United and American—have traditionally done their own aircraft maintenance. Now, aircraft maintenance is being performed by FAA certified contractors located across the country and the globe. Do you think that is a...

National	DC Elites	
76%	70%	Good Idea (NET)
28%	15%	Very good idea
48%	55%	Somewhat good idea
24%	30%	Bad Idea (NET)
20%	26%	Somewhat bad idea
4%	4%	Very bad idea

Q621 Why do you think that is a [INSERT ANSWER FROM Q620]?

GOOD IDEA		
National	DC Elite	
17%	21%	Independent / unbiased / no conflict of interest
13%	21%	Standardized / consistency / uniformity of procedures
11%	8%	More thorough / higher quality of work / do a better job
10%	7%	More regulated / stricter standards, regulations
8%	8%	More skilled employees / better trained / more specialized, knowledgeable
8%	7%	Less likely to cut corners / no pressure to certify unsafe plane
8%	8%	More oversight / checks and balances
7%	15%	No cost / profit considerations / no shortcuts to save money
7%	6%	Improved safety
4%	5%	Certified / FAA certified / government control / federal standards
4%	4%	Accountability / responsibility
3%	1%	General positive mentions
3%	7%	Lowers costs for airlines
3%	3%	Incentive is quality, pride in work / keeping the contract / no

		loyalty to airline
2%	2%	Airline knows the aircraft best / more familiar with specific type of plan
2%	--	FAA expertise with aircraft
1%	3%	Distrust government / bureaucracy / doubt ability to uphold, enforce regulations
1%	--	Creates jobs
1%	2%	Work needs to be done by airline / airline is responsible for proper maintenance
1%	3%	Competence / familiarity with more types of aircraft / problems
1%	4%	<i>Less motivated than airline / airline reputation at stake / vested interest in safety</i>
1%	--	<i>No problems with labor unions</i>
1%	--	<i>Losing jobs / airlines losing jobs / jobs going out of the country</i>
1%	--	<i>Questionable or lacking in quality work / less thorough</i>
1%	2%	<i>Focus on cost not quality / cheaper not better / Lowest bidder gets the contract</i>
1%	2%	<i>Not cost effective / could cost more</i>
1%	1%	Regulations / records open to public
*	--	Don't trust airlines
*	3%	Multiple facilities / more workers
*	1%	Less care, pride in work because no company loyalty
*	--	Questionable or lacking employee skill / training
*	2%	Lacks oversight / control / too hard to monitor or verify quality
*	--	Airlines may have stricter regulations than FAA
*	1%	US planes need US work / can't trust or control work done in a foreign country
7%	9%	Other mentions
4%	--	None / No reason
3%	3%	Don't know

BAD IDEA		
National	DC Elite	
16%	16%	Work needs to be done by airline / airline is responsible
14%	11%	Less care, pride in work because no company loyalty
10%	13%	Distrust government / bureaucracy / doubt ability to uphold/enforce regulations
10%	9%	Airline knows its aircraft best / more familiar with specific type of plane
9%	4%	US planes need US work / can't trust or control work done in foreign country
8%	11%	Lacks oversight/control / too hard to monitor or verify quality

8%	9%	Questionable or lacking in quality / less thorough
8%	2%	Lacks accountability
8%	13%	Less motivated than airline / airline reputation at stake / vested interest
6%	2%	Questionable or lacking in employee training / skill / expertise
3%	13%	Focus on cost not quality / cheaper not better / lowest bidder gets the contract
3%	4%	Losing jobs / jobs going out of country
2%	6%	Less safety
2%	--	Airlines may have stricter regulations than FAA
1%	7%	More oversight / checks and balances
1%	2%	Not cost effective / could cost more
1%	2%	General negative mentions
1%	--	Multiple facilities / more workers
*	--	More skilled employees / better trained / more specialized, knowledgeable
*	--	No cost / profit consideration. No shortcuts to save money
*	--	Regulations / Records open to public
*	--	More thorough / higher quality of work / do a better job
13%	13%	Other mentions
3%	4%	None / No reason
2%	--	Don't know

625 For years, owners of U.S. commercial and private aircraft have used maintenance contractors—in the U.S. and abroad—to service their aircraft. Congress is currently considering legislation that would make it much more difficult for any U.S. aircraft to be maintained by contract maintenance. Do you support or oppose this legislation?

National	DC Elites	
20%	26%	Oppose (NET)
8%	8%	Strongly oppose
12%	18%	Somewhat oppose
59%	53%	Not sure
22%	22%	Support (NET)
14%	11%	Somewhat support
8%	11%	Strongly support

700 Please review the following statements. After reviewing each statement, please indicate whether you agree or disagree.

TOTAL AGREE (NET)		
National	DC Elites	
86%	86%	Cargo air carriers, such as FedEx and UPS have always used contract maintenance stations—allowing them the flexibility to get the maintenance they need, when and where they need it, with the reliability required to ensure their delivery schedules.
80%	77%	<i>No matter what anyone says, the FAA will never be able to oversee international maintenance stations as well as it can oversee maintenance stations in the U.S.</i>
79%	85%	The growing contract maintenance industry is a source of stable, good paying jobs for skilled workers and has absorbed hundreds of employees laid off by struggling air carriers.
76%	83%	Maintenance stations have been under the scrutiny of the government, airlines, and the public for many years. These stations have demonstrated they have the specialized expertise and high-quality systems that ensure the best maintenance for the airlines and the flying public.
74%	62%	<i>Using international contract maintenance stations is just outsourcing—it sends U.S. jobs overseas. Once the highly skilled aircraft and avionics technicians' workforce is cut down, it will be virtually impossible to rebuild.</i>
72%	64%	The fact that the safest period in the history of civil aviation has happened at the same time the major airlines have increased the amount of contract maintenance seems to be good evidence that contract maintenance is safe.
70%	72%	The most financially stable airlines, such as Southwest and JetBlue, have never done all of their own maintenance. Using contract maintenance stations is one of the main reasons their business model is successful.
68%	66%	<i>There are few safeguards in place to prevent terrorists from exploiting an opportunity to do us harm by, for example, tampering with aircraft systems or inserting explosives into aircraft while they are undergoing maintenance.</i>
67%	67%	<i>The increased use of contract maintenance is driven primarily by the airlines' needs to cut costs at the price of sacrificing quality and safety.</i>
66%	67%	The international aviation industry creates jobs in the United States for skilled maintenance professionals.

		There are only 698 FAA certified maintenance stations outside the United States; yet there are 1200 European contract maintenance stations in the U.S. Inhibiting the maintenance of U.S. aircraft abroad could trigger international retaliation, costing Americans jobs.
64%	69%	It makes good sense for businesses to contract aircraft maintenance with companies that can do the best job for the best price no matter where those companies are located.
62%	70%	As long as international maintenance is performed under the same safety and certification standards as the U.S.—including strict oversight by U.S. and foreign government—there should be no problem with having maintenance work done abroad.
60%	59%	Legislation that would force US air carriers to conduct all their maintenance in the US is simply an attempt to protect American jobs that can be done just as effectively by less costly labor abroad.
45%	51%	It is just as safe to let foreigners do maintenance work on US aircraft as it is to let foreign air traffic controllers land US planes at foreign airports.

705 Thinking about all the messages you just reviewed, please rate the following groups or organizations one a scale from 1 to 10 where a 10 means you feel that group or organization has the utmost credibility on the issue of contract maintenance of aircraft and a 1 means you felt that group or organization has no credibility at all

MOST CREDIBLE SUMMARY (9-10)		
National	DC Elites	
31%	35%	FAA
29%	38%	National Transportation Safety Board
22%	25%	The Airline Pilots Association
21%	16%	The airlines
14%	18%	Inspector General of the Department of Transportation
11%	8%	Unions/Teamsters
10%	9%	Contract maintenance industry associations (such as Aeronautical Repair Station Association)
10%	5%	Congress
8%	4%	The general media
7%	9%	International Civil Aviation Organization (ICAO)
7%	11%	European Aviation Safety Agency (EASA)

5%	4%	The trade media
5%	8%	National Business Travelers Association

MEAN SUMMARY		
National	DC Elites	
7.4	7.7	National Transportation Safety Board
7.3	7.3	FAA
6.8	6.9	The Airline Pilots Association
6.6	6.5	The airlines
6.3	6.8	Inspector General of the Department of Transportation
6	6.3	Contract maintenance industry associations (such as Aeronautical Repair Station Association)
4.7	4.6	Congress
4.6	4.5	The general media
5.6	6.1	International Civil Aviation Organization (ICAO)
5.5	6.6	European Aviation Safety Agency (EASA)
5.3	5.5	National Business Travelers Association
5	4.8	Unions/Teamsters
4.7	4.9	The trade media

Not FAMILIAR Enough to Rate SUMMARY		
National	DC Elites	
55%	43%	European Aviation Safety Agency (EASA)
52%	41%	International Civil Aviation Organization (ICAO)
47%	36%	National Business Travelers Association
42%	28%	Contract maintenance industry associations (such as Aeronautical Repair Station Association)
33%	17%	The trade media
31%	16%	Inspector General of the Department of Transportation
26%	9%	The Airline Pilots Association
17%	5%	National Transportation Safety Board
17%	5%	Unions/Teamsters
11%	5%	The general media
11%	3%	FAA
10%	4%	Congress
8%	3%	The airlines

750 POSITIONING POLARIZATIONS

Below are some sets of two opposing hypothetical statements that you may or may not agree with. After reading each statement, please indicate which statement comes closest to your own opinion.

750 SMITH believes the major reason air travel is so safe today is because the FAA does a good job overseeing maintenances operations.

JONES believes the major reason air travel is so safe today is because the airlines and companies that operate them have so much at stake in making sure their planes are safe to fly.

National	DC Elites	
42%	40%	Smith (NET)
10%	9%	Exactly like Smith
32%	31%	Somewhat like Smith
58%	61%	Jones (NET)
41%	43%	Somewhat like Jones
17%	18%	Exactly like Jones

752 SMITH feels that commercial airlines should be required to conduct all of their own maintenance because they are the most able and responsible. Smith knows that is the only way to control the quality of maintenance of the aircraft, and believes the extra costs to the airlines are well worth it.

JONES believes that contract maintenance stations are better able to service aircraft, because that's all they do. Jones knows that major airlines have several aspects to their business, contract maintenance companies benefit from having one mission: insuring aircraft safety.

National	DC Elites	
39%	36%	Smith (NET)
11%	11%	Exactly like Smith
28%	25%	Somewhat like Smith
61%	65%	Jones (NET)
48%	50%	Somewhat like Jones
13%	15%	Exactly like Jones

760 SMITH believes that international contract maintenance stations provide terrorists with an easy opportunity to sabotage U.S. aircraft without setting foot on American soil. Different background check and drug use testing standards mixed with too few FAA inspections make international contract maintenance stations a tremendous threat to homeland security.

JONES believes that international contract maintenance stations are just as safe as airline maintenance shops. International contract maintenance stations are certified and audited by the FAA and/or U.S. bilateral partner civil air authorities. These stations, which also serve air carriers from other countries, undergo an average of 74 audits a year each by the government, airlines, and independent

third parties—reinforcing their safety procedures and greatly minimizing any potential threat to homeland security.

National	DC Elites	
57%	42%	Smith (NET)
13%	11%	Exactly like Smith
44%	32%	Somewhat like Smith
43%	58%	Jones (NET)
35%	47%	Somewhat like Jones
9%	11%	Exactly like Jones

- 765 SMITH agrees with the labor unions: contract maintenance stations are nothing more than outsourced jobs, used only to reduce the costs to the airlines and keep them competitive in the global market.
JONES believes that attacks on the contract maintenance industry are simply attempts to increase labor unions' bottom lines and preserve the benefits they've enjoyed, at the expense of the airline industry's ability to be successful in the global market.

National	DC Elites	
48%	48%	Smith (NET)
9%	10%	Exactly like Smith
39%	38%	Somewhat like Smith
52%	52%	Jones (NET)
41%	40%	Somewhat like Jones
11%	13%	Exactly like Jones

- 770 Now that you have more information about aircraft maintenance, please answer the following question, which was asked earlier.

For years, owners of U.S. commercial and private aircraft have used maintenance contractors—in the U.S. and abroad—to service their aircraft. Congress is currently considering legislation that would make it much more difficult for any U.S. aircraft to be maintained by contract maintenance. Do you support or oppose this legislation?

National	DC Elites	
44%	56%	Oppose (NET)
11%	15%	Strongly oppose
32%	41%	Somewhat oppose
28%	24%	Not sure
28%	20%	Support (NET)
22%	15%	Somewhat support
6%	6%	Strongly support

300 There are a lot of issues in the news, and it can be hard to keep track of all of them. How actively do you follow information related to the aviation industry?

National	DC Elite	
21%	36%	TOP 2 BOX (NET)
4%	19%	Very actively
17%	17%	Actively
47%	40%	Somewhat actively
31%	24%	Not at all actively
1%	--	DK/REF

305 How informed do you consider yourself to be regarding the aviation industry?

National	DC Elite	
18%	36%	TOP 2 BOX (NET)
4%	13%	Very informed
14%	23%	Informed
54%	51%	Somewhat Informed
27%	13%	Not at All Informed
1%	--	DK/REF

310 Did you vote in the last Presidential election?

National	DC Elite	
83%	92%	Yes
14%	4%	No
3%	4%	DK/REF

320. In the past year, have you:

YES SUMMARY		
National	DC Elite	
50%	84%	Signed a petition
31%	61%	Written or called any politician at the state, local, or national level
27%	49%	Attended a public meeting on town or school affairs
20%	47%	Served as an officer for some club or organization
19%	45%	Served on a committee for some local organization
17%	57%	Attended a political rally, speech, or organized protest of any kind
16%	38%	Been an active member of any group that tries to influence public policy or government
15%	38%	Made a speech
13%	34%	Written a letter to the Editor of a newspaper or magazine or called a live radio or TV show to express an opinion
6%	21%	Written an article for a magazine or newspaper
9%	26%	Worked for a political party
2%	2%	Held or run for a public office

DEMOGRAPHICS

D1 How many times a year on average do you typically use air travel for the following:

A International business

National	DC Elite	
89%	74%	Never
7%	15%	Once
2%	4%	Twice
1%	3%	Three times
1%	2%	Four times
*	--	Five times
*	1%	6-10 times
--	2%	10-15 times
*	--	More than 15 times

B Domestic business

National	DC Elite	
72%	36%	Never
10%	18%	Once
6%	17%	Twice
4%	7%	Three times
2%	5%	Four times
1%	3%	Five times
2%	11%	6-10 times
1%	1%	10-15 times
1%	2%	More than 15 times

C Domestic leisure with spouse/friends

National	DC Elite	
27%	9%	Never
30%	22%	Once
21%	23%	Twice
10%	17%	Three times
5%	15%	Four times
3%	4%	Five times
3%	7%	6-10 times
1%	3%	10-15 times
1%	1%	More than 15 times

D International leisure with spouse/friends

National	DC Elite	
67%	43%	Never
24%	34%	Once
5%	12%	Twice
2%	5%	Three times
1%	3%	Four times
*	3%	Five times
1%	1%	6-10 times
*	--	10-15 times
*	--	More than 15 times

E Domestic leisure with family/children

National	DC Elite	
49%	38%	Never
28%	28%	Once
14%	17%	Twice
5%	9%	Three times
2%	2%	Four times
1%	4%	Five times
1%	2%	6-10 times
*	--	10-15 times
*	--	More than 15 times

F International leisure with family/children

National	DC Elite	
83%	74%	Never
12%	19%	Once
3%	1%	Twice
*	3%	Three times
1%	1%	Four times
*	1%	Five times
*	1%	6-10 times
*	1%	10-15 times
*	--	More than 15 times

D2 Are you or any member of your family a member of labor union?

National	DC Elites	
13%	13%	Yes
87%	88%	No

D3 Do you or any member of your family work for any of the following

YES SUMMARY		
National	DC Elites	
3%	3%	Commercial airline industry
2%	1%	Private aviation industry
1%	1%	FAA
2%	--	Aircraft (commercial or private) maintenance industry

D4 Gender

National	DC Elites	
50%	65%	Male
50%	36%	Female

D5 Education

National	DC Elites	
2%	--	Less than high school
14%	3%	High school or GED
5%	1%	Trade School
50%	17%	Some College/Associates Degree
15%	32%	College Degree (4 yr institution)
4%	16%	Some Post Grad
10%	31%	Post Grad Degree

D6 Income

National	DC Elites	
15%	10%	Less than \$20K
28%	11%	\$20,000 - \$39,999
29%	32%	\$40,000 - \$74,999
18%	31%	\$75,000 - \$149,999
5%	8%	\$150,000 - \$249,999
2%	4%	\$250,000 or more
4%	4%	Decline to Answer

D7 Ethnicity

National	DC Elites	
77%	78%	White/Caucasian
12%	13%	Black/African American
10%	7%	Hispanic
1%	1%	Asian
1%	1%	Other

D7 Region of the country

National	DC Elites	
16%	--	Northeast (NET)
5%		New England
11%		Middle Atlantic
13%	--	Midwest (NET)
9%		East North Central
4%		West North Central
52%	100%	South (NET)
40%	100%	South Atlantic
4%	--	East South Central
8%	--	West South Central
19%	--	West (NET)
8%	--	Mountain
11%	--	Pacific

D8 Household size (Adults aside from you living in household)

National	DC Elites	
8%	7%	0
26%	32%	1
58%	53%	2-3
7%	5%	4-5
1%	1%	6+

D9 Number of children (under the age of 18 living with you)

National	DC Elites	
73%	80%	0
12%	9%	1
11%	9%	2-3
2%	--	4+

D10 Political party

National	DC Elites	
27%	18%	Republican
24%	24%	Independent
41%	51%	Democrat
9%	7%	Other