

Revealing
**AMERICANS'
AWARENESS AND
PREPAREDNESS**

Surrounding Emergency Situations

2012 Third Annual Public Safety Survey



FEDERAL SIGNAL
Safety and Security Systems

Advancing security and well-being.

About the survey

For the third consecutive year, Federal Signal Corporation's annual Public Safety Survey takes an in-depth look at American's attitudes and concerns with regard to emergency preparedness and response. Federal Signal once again called upon the expertise of the heralded research firm, Zogby International, to provide valuable insight with regard to Americans' communication preferences and likely behaviors in the event of an emergency. In addition to assessing citizens' overall state of emergency preparedness, the survey tabulates citizens' opinions on the current state of public safety with emphasis on perceived utilization of existing resources and increasing levels of community investment.

While last year's study looked at specific concerns, the 2012 Public Safety Survey hones in on the emotional reactions of citizens to disaster and emergency situations, and evaluates the level of apathy towards public safety, notifications and alerts. The online nationwide survey of 2,059 adults was conducted from June 3rd to June 5th, 2012. A sampling of Zogby International's online panel, which is representative of the adult population of the U.S., was invited to participate.

Foreward

Last year the U.S. experienced an unprecedented number of federally declared disasters which ranged from tornadoes and floods to wildfires, mudslides and more. Subsequently, many communities re-examined their public safety strategies for times of crisis. In fact, in 2011 the Federal Emergency Management Agency (FEMA) issued 99 major disaster declarations that were officially recognized by state governors, and declared official by the President of the United States, this is a shocking figure compared to the annual average of just 37 over the past 50 years. Yet despite this record-breaking year, the public still remains largely unaware of critical communication processes, and in some cases are surprisingly apathetic to emergency notification warnings and potential disaster scenarios.

Federal Signal believes their 2012 Public Safety Survey is the most comprehensive national study gauging the public's emotional reactions to emergencies and disasters – from their response to notification alerts and sirens, to the level of trust they place in their community's emergency preparedness. It takes more than community officials to ensure that the public is prepared for a disaster. Whether warnings emanate from a siren or from a neighbor, effective response to an emergency alert or notification demands the engagement of each and every citizen. Beyond illustrating the complexity of the task that faces the nation's emergency managers, this survey brings to light just how critical it is for members of the general public to be actively engaged during an emergency crisis. More importantly, the survey stresses how important it is for Americans to have an emergency plan in place that enables them to act quickly when their safety is threatened.

This year's survey found that, despite an increase in the number of disasters, too many Americans remain disturbingly complacent. Consequently, many people fail to act with a sense of urgency in times of crisis, which not only compounds the efforts of emergency managers, but will inevitably lead to tragic results.

Federal Signal recognizes this apathy as a major concern, and is dedicated to spearheading initiatives that promote public safety as a nationwide priority, and that correspond directly with the goals of the nation's emergency management professionals. The company's goals remain the same – to effectively address the host of human factors that impair or deter Americans from reacting in a responsible fashion to warning alerts and notifications, and to educate the public on the importance of maintaining an at-home safety plan for times of emergency. Recognizing that much work needs to be done in these areas, Federal Signal intends to use the results of this latest survey to build a sense of urgency with regard to improving public safety across the board. At the same time, the company will continue to move forward with emergency communications strategies that leverage both the latest technology and the company's traditional warning devices.

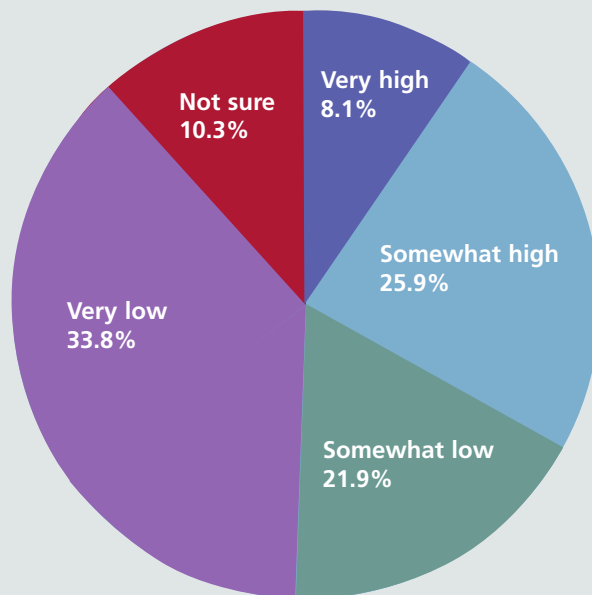
Revealing **Americans' Awareness and Preparedness** Surrounding Emergency Situations

▶ AMERICANS LACK CRITICAL KNOWLEDGE OF THEIR LOCAL EMERGENCY ALERT AND NOTIFICATION SYSTEMS

While the survey found that more than 56% of Americans believe they are aware of the steps they need to take should disaster strike, the results uncover a shocking lack of knowledge — and even indifference — surrounding emergency alerts and notification systems.

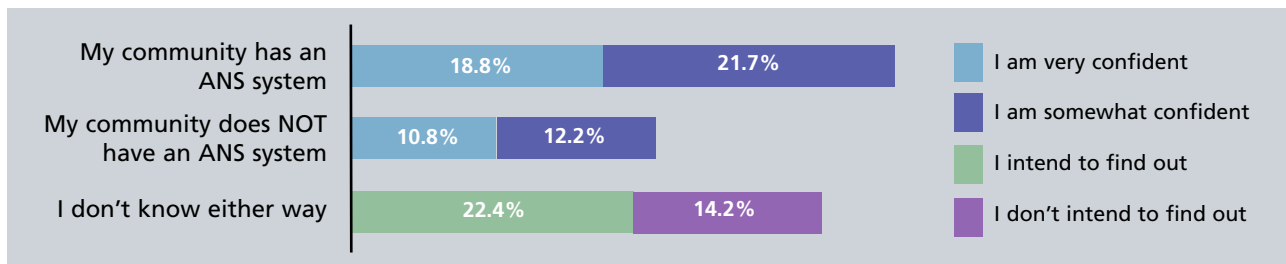
- Among age groups, respondents ages 65+ show the highest level of public safety awareness and preparedness (67% rate their level as somewhat to very high).
- More males than females rate their preparedness as very high, with 20% saying they are fully prepared and think about the issue all of the time vs. only 8% of women.
- Married respondents also rate highly for preparedness, with 64% claiming somewhat to very high awareness, compared with 46% of single respondents.
- Conservatives also rate themselves highly with 65% feeling fully prepared, vs. only 49% of liberal respondents and 46% of moderate respondents.

Americans rate their current level of public safety awareness and preparedness:



A startling 71% of Americans are unsure if they have a personal alerting and notification system (ANS) in their area, which includes a combination of options for call, text and email message notifications.

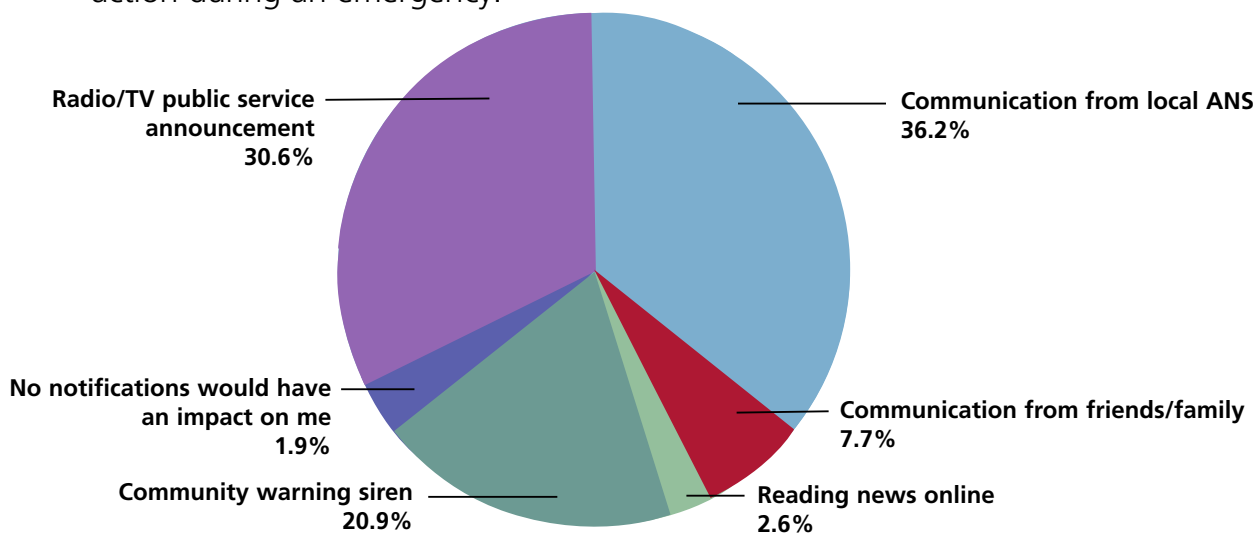
- 14% of respondents do not know whether their community has an ANS system in place – and do not intend to find out.
- More than one in four (29%) females who do not know either way intends to find out, compared with 20% of males in the same category.



36% of respondents said they would be motivated to take action in an emergency based on ANS alerts than any other communication – ahead of traditional warning sirens, radio and TV public service announcements and even word-of-mouth communication from friends and family.

- Respondents in the 18-29 age group would be significantly less motivated by a radio and/or TV announcement than any other age group (13%) vs. 34% for the next closest age group, 50-64, who rated the same choice at 34%.
- However, the 18-29 age group would be more motivated by a communication from a family member (14%) than any other age group.

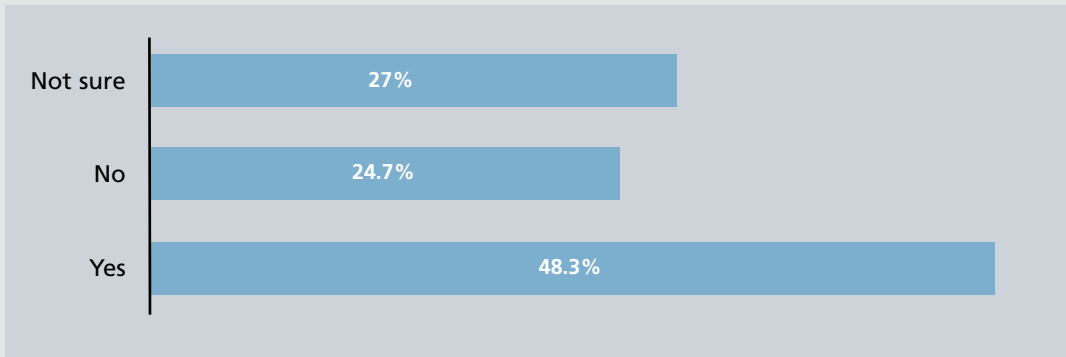
Announcement or notification type that would most motivate Americans to take action during an emergency:



More than one in four respondents (27%) does not know whether their community has a warning siren system at all.

- The youngest age group, ages 18-24, shows the lowest awareness of warning siren systems in their community with nearly half (47%) claiming they are unsure.
- The Great Lakes Region shows the strongest awareness by far – with 84% claiming to have a warning siren system in their community and only 3% responding that they are unsure.
- Americans who currently reside in a large city have the highest percentage of respondents (37%) who are unaware whether their community has a warning siren system, compared to only 17% who are unsure in rural areas.

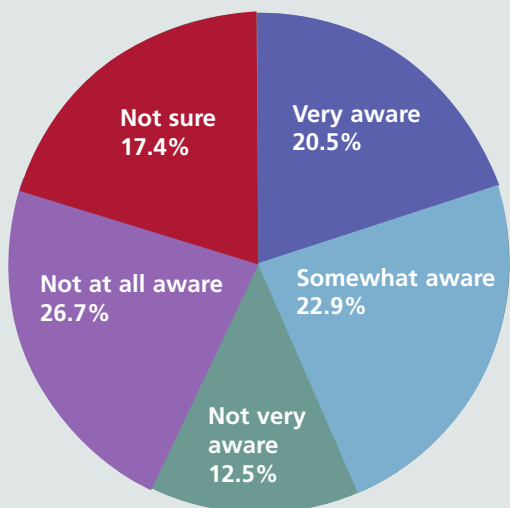
Americans who are aware of a warning siren system in their community:



More than half (56.6%) do not know when sirens in their area are tested.

- Younger respondents are the least knowledgeable, with just 8% ranking themselves as very aware, and 10% as somewhat aware of siren testing.
- Married people rank highly for siren testing awareness, with 48% considering themselves to be somewhat to very aware, vs. 34% of single respondents.

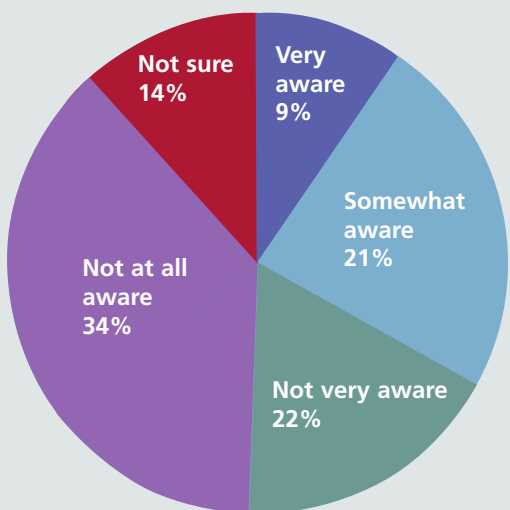
Americans largely unaware of when their local warning siren system is tested:



70% are unaware of the sounds and sirens associated with various warnings.

- The Central Great Lakes Region has the highest number of respondents who consider themselves very aware of the sounds and sirens warnings, totaling 13%.
- The 18-29 age group is the least aware, with just 16% claiming to be somewhat to very aware, vs. 39% of the 65+ age group.
- Examining results based on where Americans live, 34% of small city dwellers are somewhat to very aware of the warning signal sounds and sirens, while just 26% of large city residents feel knowledgeable.

Awareness of the different sounds/sirens associated with various warnings:

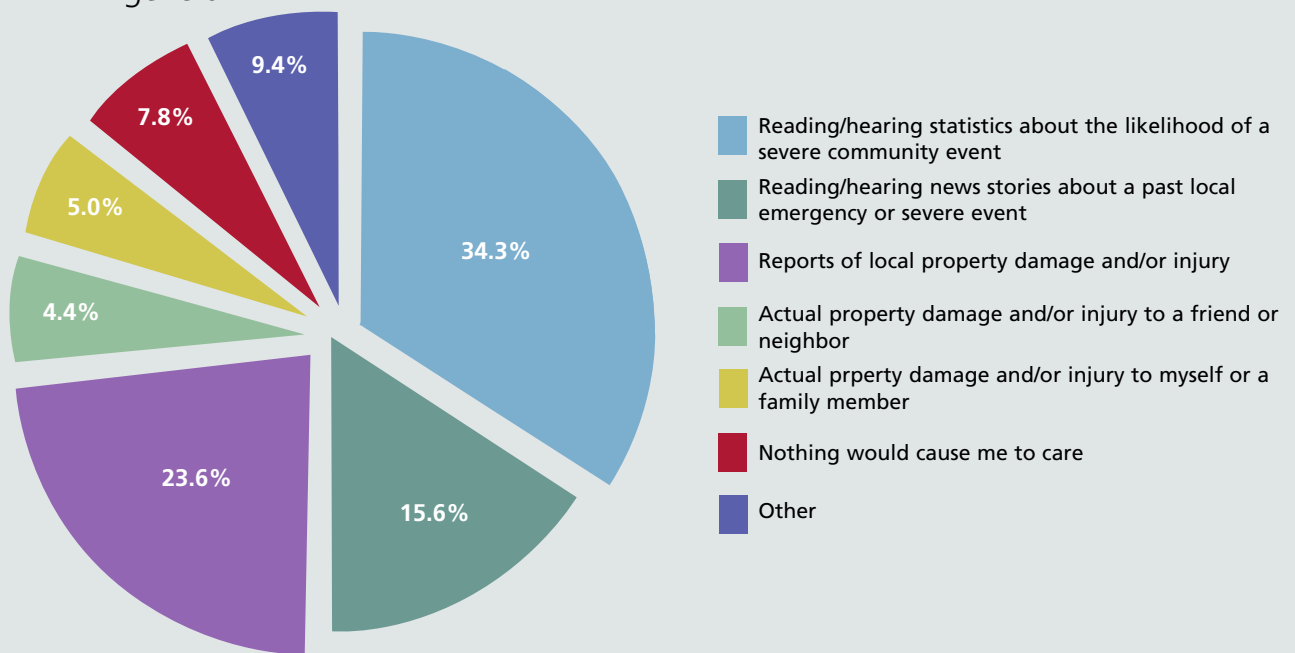


▶ **EVEN SEVERE WEATHER DOES NOT MOTIVATE AMERICANS TO TAKE ACTION**

When it comes to taking action, despite receiving a notification, just under one half (47%) of Americans would be motivated to take action during a warning of potential severe weather.

- One-third (33%) of respondents would require actual property damage or injury in order to care strongly about public safety awareness.
- 1 in 12 people say nothing would cause them to care.

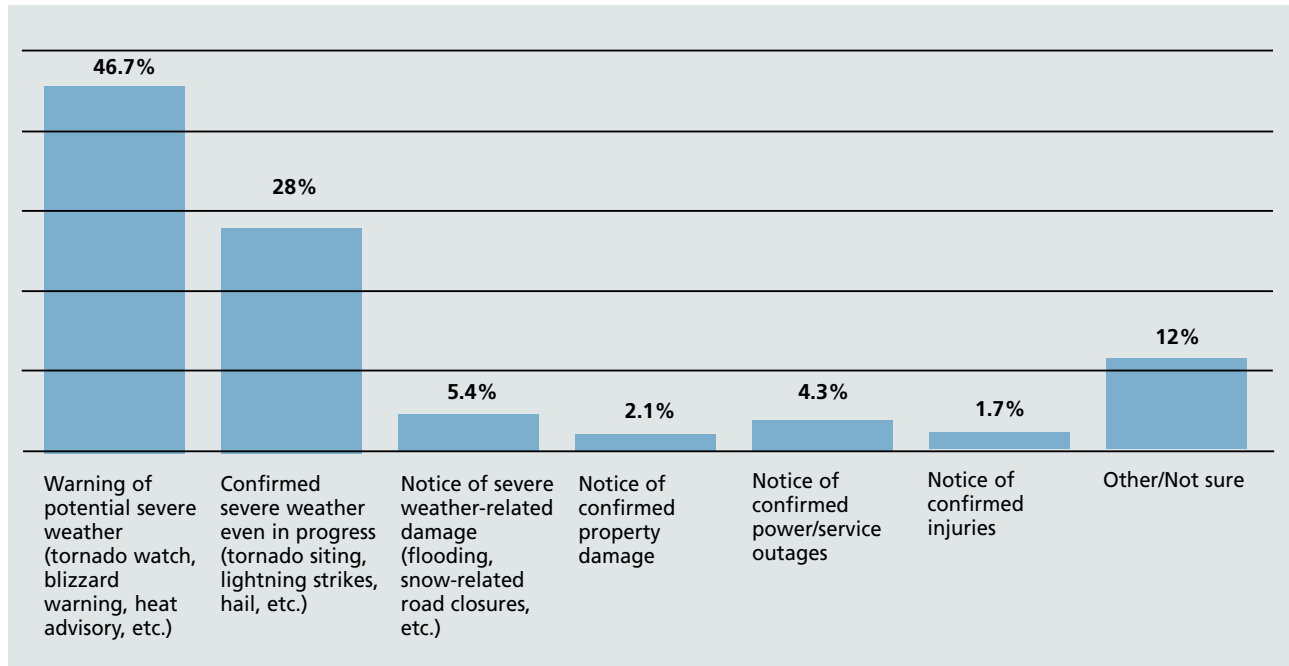
What it would take for Americans to care strongly about public safety awareness in general:



More than one in four respondents (28%) would require confirmation of severe weather, such as an actual tornado sighting, flood waters, or a visible fire in order to take immediate action.

- By a sizable margin, more Americans in the Great Lakes Region (38%) would require a confirmed severe weather event such as a tornado sighting to take immediate action.
- Men are less likely than women to take immediate action based on a warning of severe weather (42% vs. 51%, respectively) and almost twice as likely to be unsure about which scenario would first prompt them to take action (15% vs. 8% of women).
- Almost one in four (24%) of Americans in civil unions are unsure which scenario would first prompt them to take immediate action, almost 10 percentage points higher than the next relationship status category, single Americans.

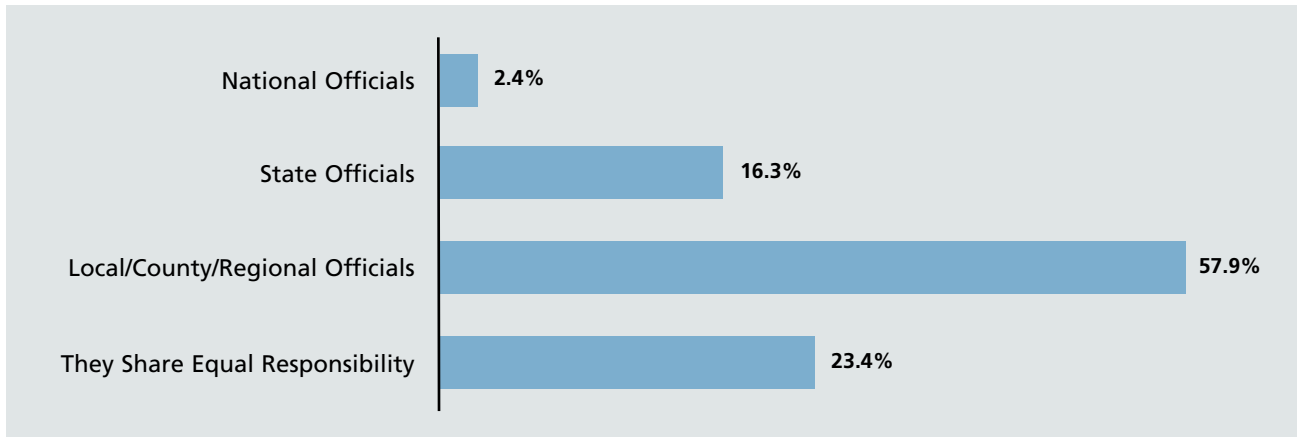
What it would take for Americans to take immediate action if notified of an emergency:



▶ AMERICANS RELY ON LOCAL PUBLIC OFFICIALS TO ENSURE SAFETY

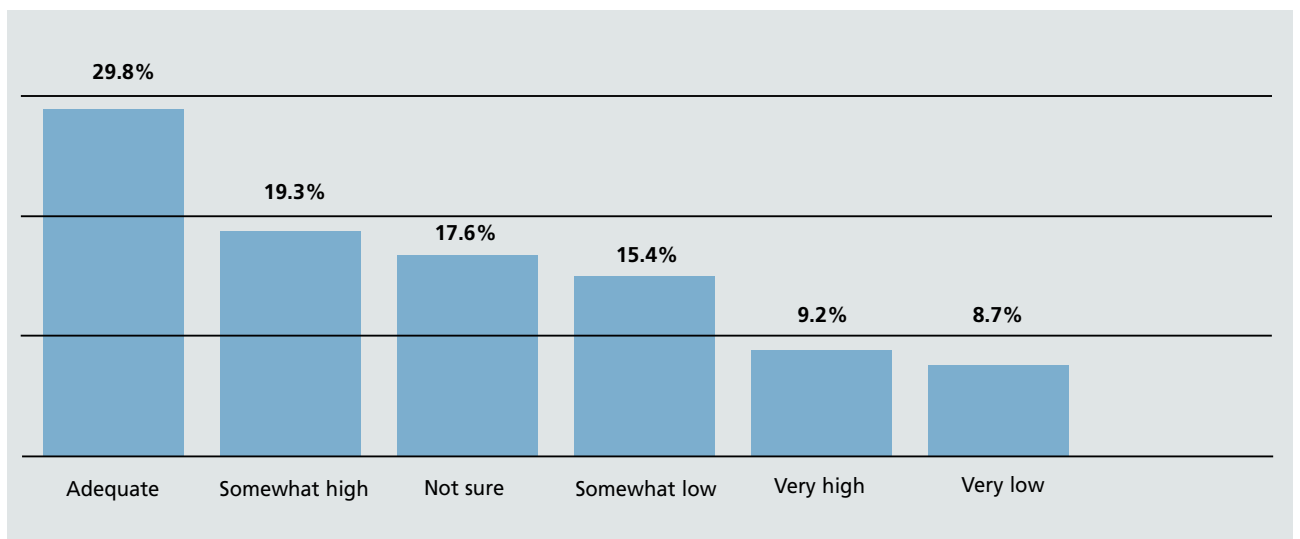
Almost six in ten (58%) of Americans trust local and regional government to ensure sufficient public safety standards, communication, and planning in their area.

Appointed officials Americans consider responsible for ensuring public safety:



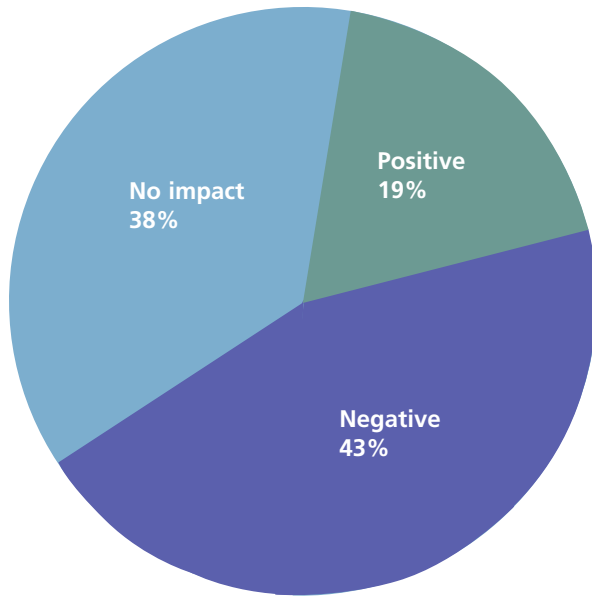
Only 29% feel that their community officials are currently investing in or giving government attention to their public safety.

Americans feel the current level of public safety or government attention in their community is:



More than one-third (43%) of Americans feel that the economy has had a negative impact on the level of investment in their community.

Impact Americans believe the economy has had on the level of local public safety investment and/or government involvement in the past five years:





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