

Background & Methodology

Conducted 1,216 surveys among Florida, Georgia, and Tennessee residents

- Fielding took place January 26, 2015 – February 4, 2015
- Utilized a proprietary online research panel
- Total is weighted by age and gender within state

Key Measures

- Vehicle Purchase Plans
- Vehicle Shopping Experiences

1. Which of these statements best describes your plans to buy a new or used vehicle? (Select all that apply)

	Florida	Georgia	Tennessee	Total
<i>Base (n=)</i>	405	405	406	1,216
Purchased a new or used vehicle in the last 3 years	31%	35%	31%	32%
Plan to purchase a new or used vehicle in 2015	20%	19%	18%	19%
Plan to purchase a new or used vehicle in 2016	18%	17%	18%	18%
None of the above	35%	33%	36%	35%

2. Which statement best describes why you recently purchased or plan to purchase a new or used vehicle?

	Florida	Georgia	Tennessee	Total
<i>Base (n=)</i>	264	268	257	789
Current vehicle is reliable but want something new	49%	37%	42%	44%
To replace an unreliable/older vehicle	21%	27%	25%	23%
To replace an out of service vehicle/vehicle damaged	12%	12%	18%	13%
Did not have a vehicle	5%	7%	6%	6%
Vehicle lease is up	8%	3%	4%	6%
Vehicle is a gift for someone else	4%	5%	4%	5%
Other	6%	13%	6%	8%

3. What sources did you use/plan to use when shopping for a new or used vehicle? (Select all the apply)

	Florida	Georgia	Tennessee	Total
<i>Base (n=)</i>	264	268	258	790
Car research/Informational websites (e.g., Kelley Blue Book, Edmunds)	59%	57%	57%	58%
Dealership locations	48%	47%	51%	49%
Dealership websites	49%	49%	46%	48%
CARFAX vehicle history reports	25%	33%	29%	28%
Referrals (e.g., Family, Friends)	22%	27%	27%	24%
Car buying service/App	11%	15%	14%	13%
Newspapers	11%	11%	11%	11%
Magazines	6%	5%	5%	6%
Other	5%	5%	6%	5%

4. Approximately, what is the price range of the vehicle you recently purchased or plan to purchase?

	Florida	Georgia	Tennessee	Total
<i>Base (n=)</i>	259	260	253	772
Under \$20,000	30%	41%	39%	34%
\$20,000 - \$29,999	29%	33%	34%	31%
\$30,000 - \$39,999	24%	14%	16%	20%
\$40,000 - \$49,999	9%	5%	5%	7%
\$50,000 or more	8%	4%	5%	6%
Unsure	1%	2%	1%	2%

5. What are the most important factors to you when purchasing a vehicle? (Select all that apply)

	Florida	Georgia	Tennessee	Total
<i>Base (n=)</i>	405	405	406	1,216
Cost	73%	82%	78%	76%
MPG/Fuel efficiency	58%	61%	60%	59%
Vehicle make/model	53%	54%	51%	53%
Safety technology	49%	48%	43%	48%
Vehicle manufacturer	43%	42%	38%	42%
Consumer reviews	34%	34%	35%	34%
Vehicle year	35%	32%	33%	34%
Resale value	20%	16%	15%	18%
Other	5%	5%	3%	5%

6. Have you experienced any of the following unpleasant situations while shopping for a vehicle? (Select all that apply)

	Florida	Georgia	Tennessee	Total
<i>Base (n=)</i>	405	405	406	1,216
Felt pressured to buy	43%	41%	45%	43%
False/misleading advertising or gimmicks	32%	30%	31%	31%
Walked out of a dealership	31%	28%	29%	30%
Felt insulted by salesperson's comments/actions	24%	24%	27%	25%
Felt ignored/salesperson focused on my spouse/companion	14%	9%	13%	12%
Other	2%	1%	1%	1%
None, never shopped for a new/used vehicle	6%	7%	6%	6%
None, have not had any unpleasant situations while vehicle shopping	29%	30%	30%	29%

7. Which of the following best describes how you would prefer to purchase a vehicle?

	Florida	Georgia	Tennessee	Total
<i>Base (n=)</i>	405	405	406	1,216
Prefer to use no-haggle pricing	53%	48%	48%	51%
Prefer to haggle to get the best deal	25%	31%	36%	28%
Prefer to get online pricing	22%	21%	16%	21%

8. Are you more inclined to purchase a less fuel efficient vehicle (like a sport utility vehicle) now that gas prices are cheaper?

	Florida	Georgia	Tennessee	Total
Base (n=)	405	405	406	1,216
Yes	20%	21%	22%	21%
No	80%	79%	78%	79%

9. At what price point does gasoline have to reach before you would lose interest in buying a lesser fuel efficient vehicle? [If Q8 = Yes]

	Florida	Georgia	Tennessee	Total
Base (n=)	78	85	83	246
\$2.00-\$2.50 a gallon	20%	19%	28%	21%
\$2.50-\$3.00 a gallon	16%	27%	30%	21%
\$3.00-\$3.50 a gallon	26%	27%	19%	25%
\$3.50-\$4.00 a gallon	38%	27%	23%	32%

Respondent Profile

Gender

	Florida	Georgia	Tennessee	Total
Base (n=)	405	405	406	1,216
Male	48%	48%	48%	48%
Female	52%	52%	52%	52%

Age

	Florida	Georgia	Tennessee	Total
Base (n=)	405	405	406	1,216
18-34	27%	30%	29%	28%
35-44	16%	18%	17%	17%
45-54	18%	19%	18%	18%
55-64	16%	16%	17%	16%
65 or older	23%	17%	19%	21%

Statistical Statement:

The AAA Consumer Pulse™ Survey was conducted online among residents living in the Southern Region of The Auto Club Group (Florida, Georgia, and Tennessee) from January 26, 2015 – February 4, 2015. A total of 1,216 residents completed the survey. Overall survey responses are weighted by gender and age within state to ensure reliable and accurate representation of the adult population (18+) in Florida, Georgia, and Tennessee.

	Base (N=)	Margin of Error
Florida	405	± 4.9 percentage points
Georgia	405	± 4.9 percentage points
Tennessee	406	± 4.9 percentage points
Total	1,216	± 2.8 percentage points