

Background & Methodology

Conducted approximately 400 surveys per state

- Fielding took place April 11, 2017 – April 19, 2017
- Utilized a proprietary online research panel
- State totals are weighted by age and gender

Key Measures

- Summer Travel Plans
- Travel Insurance Habits
- Hotel Booking Preferences

1. Overall, do you feel better, the same, or worse about traveling this year compared to 2016?

	FL	GA	IL	IA	MI	MN	NE	ND	TN	WI
Base (n=)	400	411	401	400	400	400	401	403	401	405
I feel better about traveling than last year	30%	28%	24%	15%	24%	21%	20%	36%	22%	15%
I feel the same about traveling than last year	57%	60%	62%	71%	65%	68%	70%	52%	65%	73%
I feel worse about traveling than last year	13%	12%	14%	14%	11%	11%	10%	12%	13%	12%

2. Why do you feel better about traveling this year compared to 2016? (Select all that apply) [If Q1 = Feel better about traveling]

	FL	GA	IL	IA	MI	MN	NE	ND	TN	WI
Base (n=)	125	108	96	55	96	84	68	155	86	61
My financial situation has improved	43%	46%	42%	50%	40%	38%	60%	45%	44%	36%
I have more time to travel	39%	47%	43%	36%	37%	35%	34%	40%	30%	45%
I feel better about the economy	33%	33%	29%	16%	23%	40%	18%	31%	31%	33%
New relationships in my life/traveling companions	20%	15%	16%	17%	19%	11%	9%	19%	15%	18%
I am less concerned about diseases/outbreaks (e.g., Zika virus)	10%	13%	14%	7%	6%	13%	9%	11%	14%	12%
I am less concerned about domestic or international violence/terrorism	9%	10%	12%	8%	16%	10%	14%	9%	15%	13%
Other	2%	0%	2%	4%	8%	9%	3%	4%	3%	8%

3. Why do you feel worse about traveling this year compared to 2016? (Select all that apply) [If Q1 = Feel worse about traveling]

	FL	GA	IL	IA	MI	MN	NE	ND	TN	WI
Base (n=)	51	47	56	55	44	42	45	49	52	49
Concerned about domestic or international violence/terrorism	68%	54%	61%	54%	66%	70%	55%	57%	46%	53%
Airport/TSA security concerns	38%	45%	39%	32%	46%	38%	40%	47%	31%	22%
Financial concerns	34%	28%	28%	39%	36%	41%	37%	35%	40%	33%
Concerned about travel restrictions	30%	33%	36%	29%	37%	24%	18%	34%	22%	30%
Concerned about diseases/outbreaks (e.g., Zika virus)	19%	26%	14%	17%	23%	24%	25%	19%	14%	18%
Concerned about the economy	16%	19%	21%	22%	18%	19%	20%	20%	26%	8%
Health concerns (self or family)	16%	14%	18%	18%	14%	11%	26%	8%	24%	26%
Less time to travel	9%	9%	7%	17%	11%	9%	7%	7%	17%	19%
Fewer traveling companions	2%	2%	4%	3%	2%	5%	8%	3%	11%	8%
Other	5%	13%	9%	7%	11%	7%	10%	4%	15%	10%

4. How do your vacation plans this year compare to 2016? - Vacation Amount

	FL	GA	IL	IA	MI	MN	NE	ND	TN	WI
Base (n=)	400	411	401	400	400	400	401	403	401	405
I will take more vacations this year	43%	41%	38%	30%	37%	36%	35%	44%	34%	32%
I will take fewer vacations this year	15%	15%	15%	18%	11%	13%	16%	17%	19%	16%
No difference	42%	44%	47%	52%	52%	51%	49%	39%	47%	52%

5. How do your vacation plans this year compare to 2016? - Vacation Length

	FL	GA	IL	IA	MI	MN	NE	ND	TN	WI
Base (n=)	400	411	401	400	400	400	401	403	401	405
I will take a longer vacation(s) this year	39%	35%	32%	27%	30%	33%	32%	39%	30%	28%
I will take a shorter vacation(s) this year	17%	15%	17%	15%	14%	13%	14%	16%	17%	15%
No difference	44%	50%	51%	58%	56%	54%	54%	45%	53%	57%

6. How do your vacation plans this year compare to 2016? - Vacation Spend

	FL	GA	IL	IA	MI	MN	NE	ND	TN	WI
Base (n=)	400	411	401	400	400	400	401	403	401	405
I will spend more on vacation(s) this year	45%	41%	40%	33%	37%	38%	38%	44%	35%	35%
I will spend less on vacation(s) this year	19%	18%	20%	21%	18%	19%	18%	19%	22%	18%
No difference	36%	41%	40%	46%	45%	43%	44%	37%	43%	47%

7. Do you have a valid passport?

	FL	GA	IL	IA	MI	MN	NE	ND	TN	WI
Base (n=)	400	411	401	400	400	400	401	403	401	405
Yes	75%	60%	70%	55%	58%	64%	60%	69%	53%	62%
No	25%	40%	30%	45%	42%	36%	40%	31%	47%	38%

8. Do you plan to take at least one vacation trip, of 3 days or more, during the summer months from Memorial Day (May 29th) through Labor Day (September 4th)?

	FL	GA	IL	IA	MI	MN	NE	ND	TN	WI
Base (n=)	400	411	401	400	400	400	401	403	401	405
Yes	67%	69%	64%	62%	68%	70%	69%	75%	66%	69%
No	17%	16%	19%	20%	17%	17%	16%	10%	18%	18%
Don't know	16%	15%	17%	18%	15%	13%	15%	15%	16%	13%

9. Do you plan to travel domestically within the United States, or do you plan to travel internationally this summer? [If Q8 = Yes]

	FL	GA	IL	IA	MI	MN	NE	ND	TN	WI
Base (n=)	272	281	256	249	273	278	272	304	264	281
Domestic	71%	72%	74%	83%	79%	82%	86%	73%	79%	80%
International	9%	6%	8%	7%	8%	4%	3%	6%	7%	6%
Both domestic and international	20%	22%	18%	10%	13%	14%	11%	21%	14%	14%

10. Approximately how long will your summer vacation(s) last? (Select all that apply) [If Q8 = Yes]

	FL	GA	IL	IA	MI	MN	NE	ND	TN	WI
Base (n=)	272	281	256	249	273	278	272	304	264	281
3-4 days	24%	29%	27%	34%	30%	31%	37%	25%	29%	32%
5-6 days	28%	30%	30%	29%	31%	31%	29%	32%	25%	31%
7-8 days	24%	27%	28%	20%	25%	23%	20%	26%	27%	27%
9-10 days	12%	9%	10%	6%	9%	12%	10%	13%	10%	11%
More than 10 days	21%	15%	15%	16%	14%	14%	15%	13%	17%	13%
Don't know	1%	2%	2%	4%	1%	3%	2%	3%	3%	1%

11. How do you plan to get to your summer vacation destination(s) or cruise(s)? (Select all that apply) [If Q8 = Yes]

	FL	GA	IL	IA	MI	MN	NE	ND	TN	WI
Base (n=)	272	281	256	249	273	278	272	304	264	281
Drive in car	62%	69%	55%	72%	73%	78%	74%	67%	70%	69%
Fly	56%	51%	60%	41%	45%	39%	41%	54%	46%	49%
Train	5%	6%	7%	2%	5%	3%	1%	8%	4%	5%
Drive in RV	4%	4%	3%	4%	5%	5%	2%	7%	2%	2%
Other transportation	4%	2%	3%	2%	<1%	2%	1%	1%	3%	2%
Don't know	2%	2%	1%	2%	2%	1%	1%	1%	1%	1%

12. Do you plan to take any of the following types of vacations this summer? [If Q8 = Yes]

% Yes	FL	GA	IL	IA	MI	MN	NE	ND	TN	WI
Base (n=)	272	281	256	249	273	278	272	304	264	281
Beach / Lake getaway	67%	79%	66%	55%	72%	70%	51%	73%	64%	63%
Theme park	51%	48%	42%	30%	40%	29%	34%	58%	36%	33%
Ocean cruise	41%	27%	22%	10%	14%	13%	9%	24%	19%	11%
Domestic guided tour	27%	19%	17%	11%	13%	15%	10%	25%	8%	14%
International guided tour	23%	19%	17%	6%	8%	8%	5%	19%	9%	9%
River cruise	20%	16%	14%	5%	12%	15%	6%	21%	11%	6%

13. Do you plan to purchase travel insurance for any of your vacation(s) this summer? [If Q8 = Yes]

	FL	GA	IL	IA	MI	MN	NE	ND	TN	WI
Base (n=)	272	281	256	249	273	278	272	304	264	281
Yes	39%	31%	28%	19%	17%	17%	14%	34%	23%	14%
No	61%	69%	72%	81%	83%	83%	86%	66%	77%	86%

14. Why do you NOT intend to purchase travel insurance for your summer vacation(s)? [If Q13 = No]

	FL	GA	IL	IA	MI	MN	NE	ND	TN	WI
Base (n=)	165	197	184	203	226	230	235	193	205	241
Don't think I'll need it	63%	52%	64%	63%	58%	65%	61%	58%	60%	62%
Don't think it's worth the cost	28%	30%	32%	27%	37%	27%	30%	34%	30%	27%
Can't afford the added expense	10%	12%	12%	6%	11%	8%	5%	9%	12%	10%
Didn't know I could buy it	8%	8%	8%	5%	4%	4%	5%	5%	7%	4%
Don't know what it covers	5%	7%	9%	6%	4%	6%	7%	8%	6%	6%
Other reason	3%	5%	3%	3%	4%	3%	4%	4%	3%	4%

15. Will your summer vacation(s) require an overnight stay in a hotel?

	FL	GA	IL	IA	MI	MN	NE	ND	TN	WI
Base (n=)	272	281	256	249	273	278	272	304	264	281
Yes	90%	90%	85%	86%	84%	78%	80%	87%	87%	81%
No	10%	10%	15%	14%	16%	22%	20%	13%	13%	19%

16. What factors are most influential when deciding where to book a hotel? (Select all that apply)

	FL	GA	IL	IA	MI	MN	NE	ND	TN	WI
Base (n=)	400	411	401	400	400	400	401	403	401	405
Price	66%	73%	71%	74%	73%	77%	75%	64%	74%	73%
Hotel ratings/reviews	46%	48%	47%	44%	44%	42%	43%	47%	47%	47%
Hotel amenities	42%	45%	41%	45%	41%	39%	44%	36%	41%	40%
Discounts	39%	36%	34%	38%	37%	34%	33%	32%	34%	35%
Brand reputation	39%	36%	34%	29%	30%	26%	32%	30%	31%	29%
Proximity to attractions/location	39%	44%	52%	44%	41%	46%	48%	39%	45%	44%
Free parking	34%	39%	33%	37%	34%	37%	36%	31%	34%	35%
Loyalty programs	33%	34%	36%	30%	32%	30%	32%	30%	35%	30%
Free meals	31%	35%	30%	39%	36%	41%	39%	31%	36%	36%
Swimming pool/hot tub	28%	32%	31%	31%	34%	31%	31%	30%	32%	34%
Room upgrades (e.g., better room views)	22%	21%	18%	13%	14%	11%	12%	17%	18%	11%
Onsite restaurant	20%	16%	13%	12%	15%	13%	10%	18%	12%	11%
Guaranteed late check out	13%	15%	10%	9%	8%	8%	8%	9%	12%	9%
Children stay free	7%	11%	8%	8%	11%	8%	7%	12%	9%	7%
Other	4%	2%	2%	2%	3%	4%	3%	2%	2%	4%
None, have not booked a hotel	5%	7%	6%	7%	9%	7%	7%	5%	7%	8%

Respondent Profile

Gender										
	FL	GA	IL	IA	MI	MN	NE	ND	TN	WI
Base (n=)	400	411	401	400	400	400	401	403	401	405
Male	48%	48%	49%	49%	49%	49%	49%	51%	48%	49%
Female	52%	52%	51%	51%	51%	51%	51%	49%	52%	51%

Age										
	FL	GA	IL	IA	MI	MN	NE	ND	TN	WI
Base (n=)	400	411	401	400	400	400	401	403	401	405
18-34	27%	31%	30%	30%	29%	30%	31%	36%	29%	29%
35-44	15%	18%	17%	15%	15%	16%	16%	15%	16%	15%
45-54	17%	18%	18%	17%	18%	18%	16%	15%	18%	18%
55-64	16%	16%	17%	17%	18%	17%	17%	16%	17%	18%
65 or older	25%	17%	18%	21%	20%	19%	20%	18%	20%	20%

Statistical Statement:

The AAA Consumer Pulse™ Survey was conducted online among residents living in The Auto Club Group territory from April 11, 2017 – April 19, 2017. Approximately 400 residents in each state completed the survey. State results have a margin of error of $\pm 4.8 - \pm 4.9$ percentage points. Responses are weighted by gender and age to ensure reliable and accurate representation of the adult population (18+).