

Background & Methodology

Conducted approximately 400 surveys per state

- Fielding took place April 4, 2018 – April 18, 2018
- Utilized a proprietary online research panel
- State totals are weighted by age and gender

Key Measures

- Summer Travel Plans
- Travel Insurance Purchase Plans

1. Do you plan to take at least one vacation of 3 or more days during the summer months (but not including the Memorial and Labor Day holiday weekends)?											
	FL	GA	IL	IA	MI	MN	NE	ND	TN	WI	Total
Base (n=)	400	402	411	401	401	400	401	400	402	402	4,020
Yes	74%	69%	73%	71%	73%	70%	75%	71%	69%	70%	72%
No	14%	17%	15%	16%	16%	14%	12%	17%	15%	18%	15%
Unsure	12%	14%	12%	13%	11%	16%	13%	12%	16%	12%	13%

2. How do you plan to get to your summer vacation destination(s) or cruise(s)? (Select all that apply)											
	FL	GA	IL	IA	MI	MN	NE	ND	TN	WI	Total
Base (n=)	296	276	296	283	294	280	295	274	276	280	2,850
Drive	67%	77%	60%	79%	71%	75%	69%	77%	78%	79%	68%
Fly	50%	41%	56%	35%	44%	37%	43%	34%	35%	38%	48%
Other modes of transportation	4%	3%	3%	3%	4%	2%	3%	2%	2%	4%	4%

3. Do you plan to travel domestically within the United States, or do you plan to travel internationally this summer?											
	FL	GA	IL	IA	MI	MN	NE	ND	TN	WI	Total
Base (n=)	296	276	296	283	294	280	295	274	276	280	2,850
Domestic	68%	69%	69%	84%	78%	85%	85%	87%	73%	78%	71%
International	10%	9%	9%	5%	8%	3%	3%	4%	8%	6%	9%
Both domestic and international	22%	22%	22%	11%	14%	12%	12%	9%	19%	16%	20%

4. Do you plan to take any of the following types of vacations this summer?												
	% Yes	FL	GA	IL	IA	MI	MN	NE	ND	TN	WI	Total
Base (n=)		296	276	296	283	294	280	295	274	276	280	2,850
Beach/lake getaway	63%	75%	63%	59%	67%	58%	52%	52%	65%	56%	64%	
Theme park	51%	43%	40%	35%	39%	27%	31%	30%	44%	28%	45%	
Ocean cruise	35%	24%	20%	6%	15%	8%	9%	7%	23%	12%	27%	
Domestic guided tour	21%	20%	25%	11%	18%	11%	17%	13%	14%	13%	20%	
International guided tour	17%	19%	21%	8%	14%	3%	6%	3%	12%	8%	16%	
River cruise	17%	15%	18%	11%	13%	11%	11%	5%	10%	8%	16%	

5. Do you plan to purchase travel insurance for any of your vacations this summer?												
	FL	GA	IL	IA	MI	MN	NE	ND	TN	WI	Total	
Base (n=)	296	276	296	283	294	280	295	274	276	280	2,850	
Yes	29%	31%	28%	12%	20%	13%	13%	16%	21%	13%	27%	
No	58%	58%	58%	79%	68%	78%	78%	76%	64%	72%	60%	
Unsure	13%	11%	14%	9%	12%	9%	9%	8%	15%	15%	13%	

6. Are you more inclined to purchase travel insurance this year than 2017?												
	FL	GA	IL	IA	MI	MN	NE	ND	TN	WI	Total	
Base (n=)	296	276	296	283	294	280	295	274	276	280	2,850	
Yes	37%	32%	33%	20%	30%	19%	17%	19%	27%	24%	33%	
No	63%	68%	67%	80%	70%	81%	83%	81%	73%	76%	67%	

7. Why are you more inclined to purchase travel insurance this year? (Select all that apply)												
	FL	GA	IL	IA	MI	MN	NE	ND	TN	WI	Total	
Base (n=)	296	276	296	283	294	280	295	274	276	280	2,850	
Travel mishaps	55%	51%	55%	48%	49%	55%	50%	61%	54%	43%	53%	
Health concerns	50%	47%	42%	36%	33%	43%	46%	34%	46%	45%	46%	
Hurricanes/severe storms	49%	44%	26%	20%	33%	29%	27%	19%	40%	33%	42%	
Terrorism/violence	37%	32%	31%	31%	20%	28%	45%	24%	25%	32%	33%	
Other	4%	4%	4%	9%	13%	3%	4%	9%	7%	4%	5%	

8A. How do your summer vacation plans this year compare to your 2017 summer travels? - Vacation Amount												
	FL	GA	IL	IA	MI	MN	NE	ND	TN	WI	Total	
Base (n=)	296	276	296	283	294	280	295	274	276	280	2,850	
I will take more vacations this year	43%	44%	39%	46%	42%	38%	42%	39%	45%	43%	42%	
I will take fewer vacations this year	9%	9%	11%	10%	11%	11%	12%	13%	10%	11%	10%	
No difference	48%	47%	50%	44%	47%	51%	46%	48%	45%	46%	48%	

8B. How do your summer vacation plans this year compare to your 2017 summer travels? - Vacation Length												
	FL	GA	IL	IA	MI	MN	NE	ND	TN	WI	Total	
Base (n=)	296	276	296	283	294	280	295	274	276	280	2,850	
I will take a longer vacation(s) this year	41%	41%	42%	34%	41%	37%	36%	37%	42%	39%	41%	
I will take a shorter vacation(s) this year	15%	13%	12%	19%	12%	14%	17%	19%	13%	15%	14%	
No difference	44%	46%	46%	47%	47%	49%	47%	44%	45%	46%	45%	

8C. How do your summer vacation plans this year compare to your 2017 summer travels? - Vacation Spend												
	FL	GA	IL	IA	MI	MN	NE	ND	TN	WI	Total	
Base (n=)	296	276	296	283	294	280	295	274	276	280	2,850	
I will spend more on vacation(s) this year	48%	43%	51%	46%	50%	42%	46%	45%	44%	49%	48%	
I will spend less on vacation(s) this year	17%	16%	11%	17%	15%	16%	17%	21%	15%	15%	15%	
No difference	35%	41%	38%	37%	35%	42%	37%	34%	41%	36%	37%	

9A. How do your current feelings about the following impact your summer travel plans? - <u>My financial situation</u>												
	FL	GA	IL	IA	MI	MN	NE	ND	TN	WI	Total	
Base (n=)	296	276	296	283	294	280	295	274	276	280	2,850	
I am more likely to travel	23%	20%	23%	18%	22%	19%	24%	19%	20%	22%	22%	
I am less likely to travel	46%	42%	46%	42%	45%	50%	39%	40%	40%	46%	45%	
Neither, no Impact on travel plans	31%	38%	31%	40%	33%	31%	37%	41%	40%	32%	33%	

9B. How do your current feelings about the following impact your summer travel plans? - <u>The economy</u>												
	FL	GA	IL	IA	MI	MN	NE	ND	TN	WI	Total	
Base (n=)	296	276	296	283	294	280	295	274	276	280	2,850	
I am more likely to travel	18%	16%	15%	11%	12%	11%	11%	10%	14%	12%	16%	
I am less likely to travel	58%	56%	62%	64%	65%	68%	64%	63%	60%	68%	60%	
Neither, no Impact on travel plans	24%	28%	23%	25%	23%	21%	25%	27%	26%	20%	24%	

9C. How do your current feelings about the following impact your summer travel plans? - <u>Domestic or international violence/terrorism</u>												
	FL	GA	IL	IA	MI	MN	NE	ND	TN	WI	Total	
Base (n=)	296	276	296	283	294	280	295	274	276	280	2,850	
I am more likely to travel	12%	10%	6%	2%	5%	2%	3%	3%	7%	3%	9%	
I am less likely to travel	53%	52%	59%	58%	55%	64%	61%	57%	55%	59%	55%	
Neither, no Impact on travel plans	35%	38%	35%	40%	40%	34%	36%	40%	38%	38%	36%	

9D. How do your current feelings about the following impact your summer travel plans? - <u>General severe weather/storms</u>												
	FL	GA	IL	IA	MI	MN	NE	ND	TN	WI	Total	
Base (n=)	296	276	296	283	294	280	295	274	276	280	2,850	
I am more likely to travel	11%	7%	8%	2%	5%	4%	4%	1%	5%	3%	9%	
I am less likely to travel	56%	54%	58%	64%	60%	71%	61%	63%	59%	67%	58%	
Neither, no Impact on travel plans	33%	39%	34%	34%	35%	25%	35%	36%	36%	30%	33%	

9E. How do your current feelings about the following impact your summer travel plans? - <u>The 2016 hurricane season</u>												
	FL	GA	IL	IA	MI	MN	NE	ND	TN	WI	Total	
Base (n=)	296	276	296	283	294	280	295	274	276	280	2,850	
I am more likely to travel	13%	8%	7%	1%	4%	2%	2%	2%	5%	3%	9%	
I am less likely to travel	65%	69%	70%	81%	72%	82%	80%	80%	71%	77%	69%	
Neither, no Impact on travel plans	22%	23%	23%	18%	24%	16%	18%	18%	24%	20%	22%	

9F. How do your current feelings about the following impact your summer travel plans? - <u>Diseases/outbreaks</u>												
	FL	GA	IL	IA	MI	MN	NE	ND	TN	WI	Total	
Base (n=)	296	276	296	283	294	280	295	274	276	280	2,850	
I am more likely to travel	10%	9%	5%	1%	3%	2%	3%	3%	3%	2%	8%	
I am less likely to travel	56%	57%	61%	63%	63%	69%	68%	61%	59%	64%	58%	
Neither, no Impact on travel plans	34%	34%	34%	36%	34%	29%	29%	36%	38%	34%	34%	

10. Which of the following best describes how, if at all, the threat of violence/terrorism impacts your decision to travel?											
	FL	GA	IL	IA	MI	MN	NE	ND	TN	WI	Total
Base (n=)	400	402	411	401	401	400	401	400	402	402	4,020
I will strongly avoid locations that have had violence/terrorism incidents	38%	40%	35%	34%	28%	28%	28%	32%	32%	32%	36%
I will be more selective about the locations where I plan to travel	35%	37%	39%	40%	41%	42%	43%	34%	40%	39%	38%
I will visit places I planned to travel to regardless of violence/terrorism threats	13%	12%	14%	11%	15%	15%	16%	17%	15%	14%	13%
N/A - I hardly travel regardless of the threat of violence/terrorism	14%	11%	12%	15%	16%	15%	13%	17%	13%	15%	13%

11. Do you have a valid passport?											
	FL	GA	IL	IA	MI	MN	NE	ND	TN	WI	Total
Base (n=)	400	402	411	401	401	400	401	400	402	402	4,020
Yes	70%	59%	68%	55%	61%	64%	55%	59%	49%	64%	66%
No	30%	41%	32%	45%	39%	36%	45%	41%	51%	36%	34%

Respondent Profile

Gender											
	FL	GA	IL	IA	MI	MN	NE	ND	TN	WI	Total
Base (n=)	400	402	411	401	401	400	401	400	402	402	4,020
Male	48%	48%	48%	49%	48%	49%	48%	51%	48%	49%	48%
Female	52%	52%	52%	51%	52%	51%	52%	49%	52%	51%	52%

Age											
	FL	GA	IL	IA	MI	MN	NE	ND	TN	WI	Total
Base (n=)	400	402	411	401	401	400	401	400	402	402	4,020
18-34	27%	31%	30%	29%	29%	29%	29%	33%	29%	29%	28%
35-44	15%	18%	17%	15%	15%	16%	17%	14%	16%	15%	16%
45-54	17%	18%	17%	16%	17%	17%	16%	15%	17%	17%	17%
55-64	16%	16%	17%	18%	18%	18%	17%	18%	17%	18%	17%
65 or older	25%	17%	19%	22%	21%	20%	21%	20%	21%	21%	22%

Statistical Statement:

The AAA Consumer Pulse™ Survey was conducted online among residents living in The Auto Club Group territory from April 4, 2018 – April 18, 2018. A total of 4,020 residents completed the survey, with 2,850 planning to take at least one summer vacation. Total results have a maximum margin of error of ± 1.8 percentage points. Responses are weighted by gender and age within state to ensure reliable and accurate representation of the adult population (18+).