

# **2010 Spring Break Poll**

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**Southern California Report – March 2010**

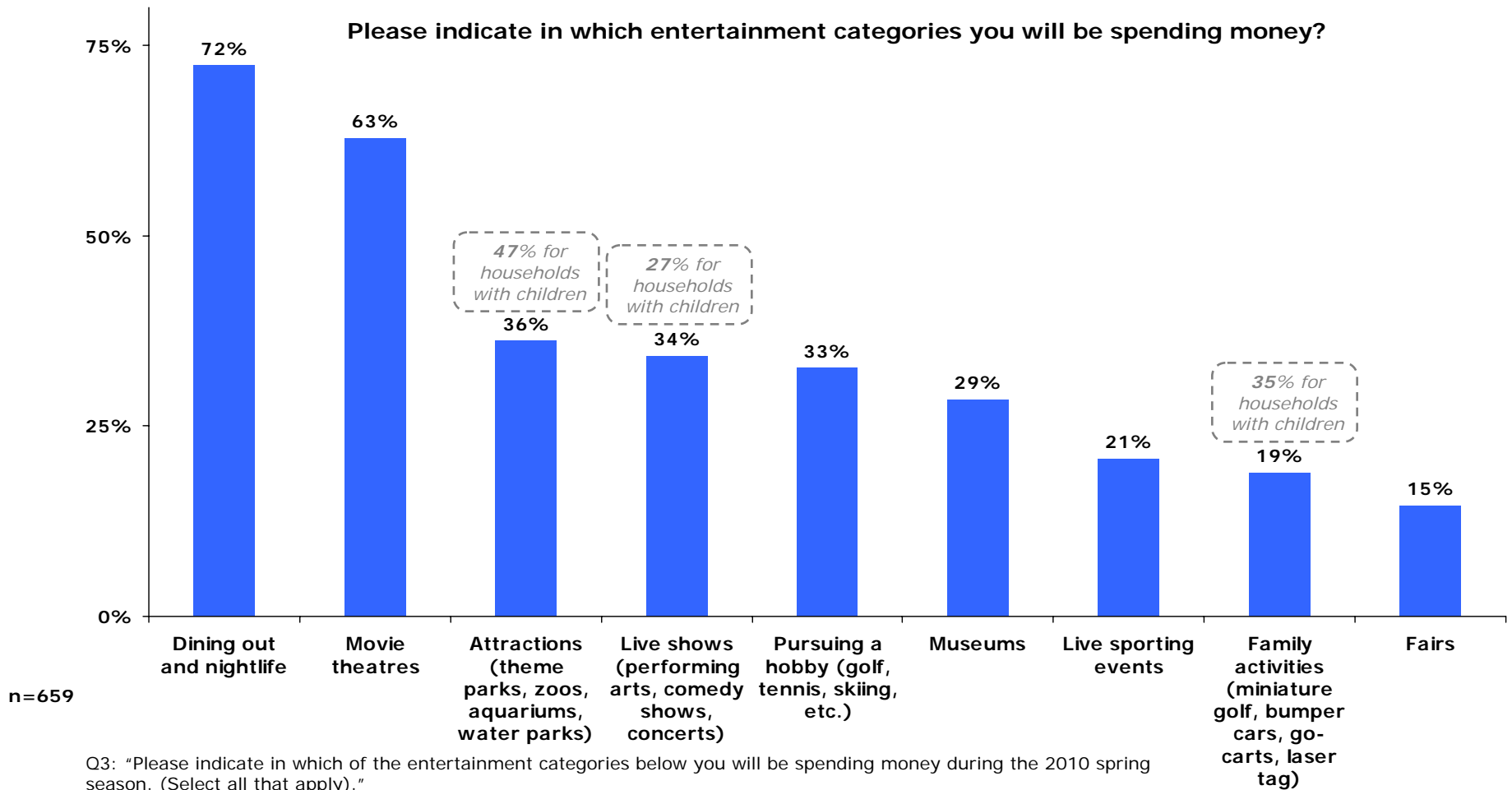
# Background & Methodology

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- This survey was conducted among members to learn about their travel and entertainment plans for spring 2010 (defined as all of March and April, 2010). This research will provide newsworthy information about spring travel and entertainment plans in ACE states to increase media coverage of AAA's travel and discount expertise.
- An online survey was fielded to the AAA Insiders online member panel in all ACE territories.
  - A total of 2,659 respondents completed the survey.
    - 659 in the Auto Club of Southern California
    - 374 in AAA Texas
    - 272 in AAA New Mexico
    - 332 in AAA Hawaii
    - 307 in AAA Alabama
    - 290 in AAA Northern New England
    - 425 in AAA Missouri
  - The survey fielded from February 22 to March 1, 2010. These surveys averaged 5 minutes in length.
- Survey results are weighted by age and have a margin of error of +/- 3.6%.

# 'Dining out and nightlife' and 'Movie theatres' were the most common entertainment categories

- There was a large drop-off to the third most common entertainment category, 'Attractions (theme parks, zoos, aquariums, water parks)'.

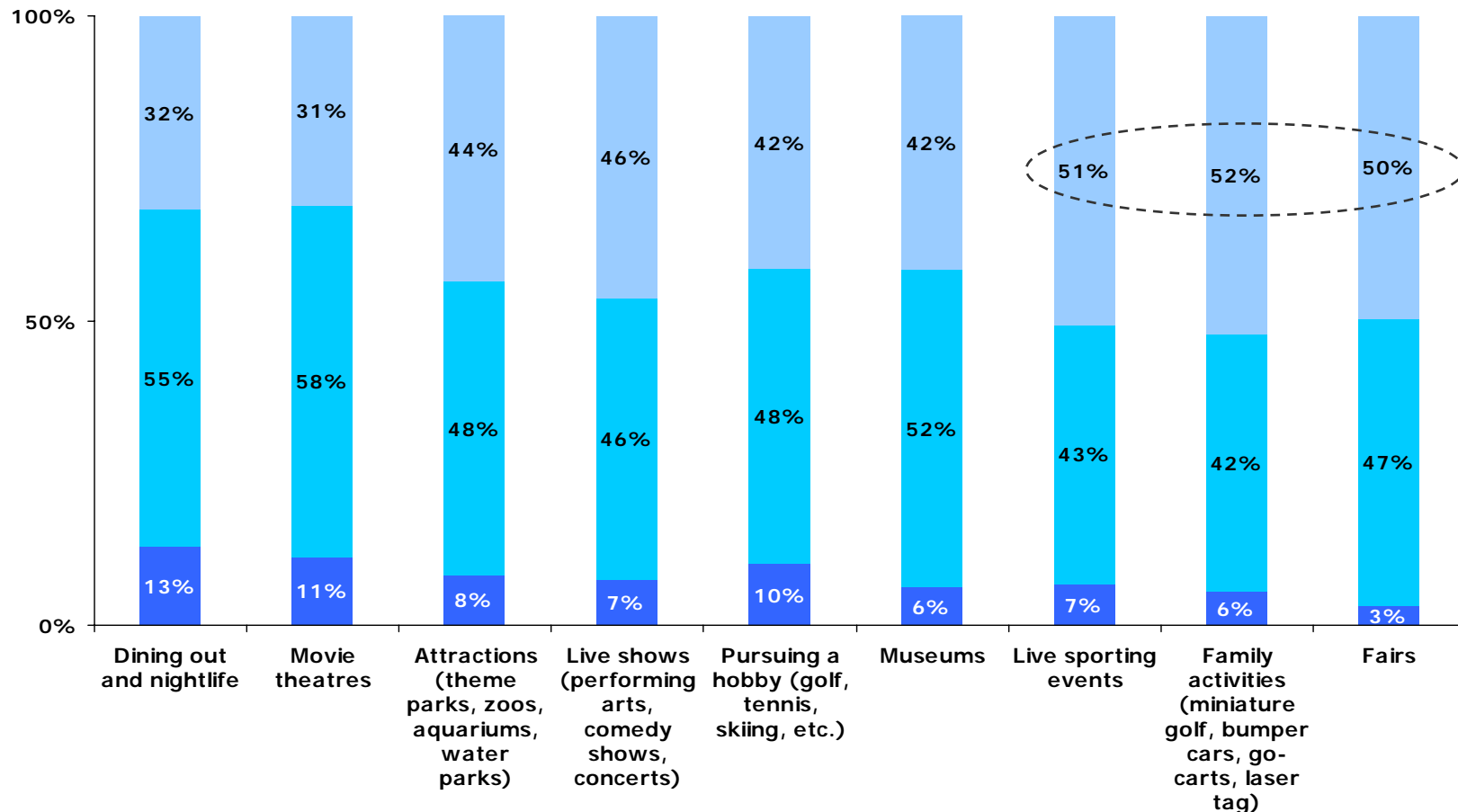


Base: Member households in Southern California.

# Members plan to cut back on all entertainment categories this spring

- 'Live sporting events', 'Family activities', and 'Fairs' were the categories where members were most likely to cut back.

■ Will spend more this spring   ■ Will spend about the same amount this spring   ■ Will spend less this spring



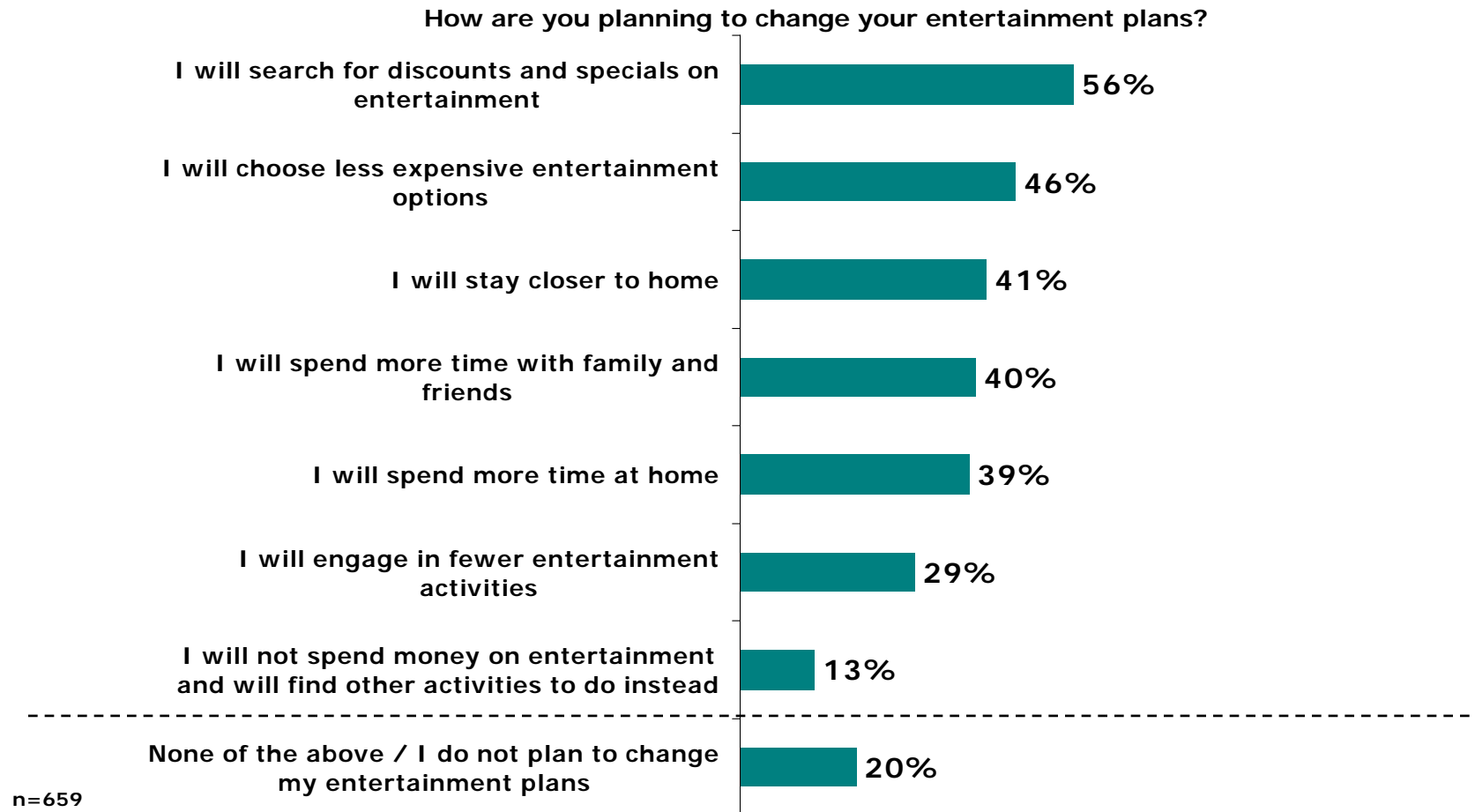
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Q4: "Please indicate if you will be spending more, less, or about the same amount of money in each category below during the 2010 spring season compared to your spring entertainment spending in years prior to the current economic downturn."

Base: Member households in Southern California.

# Majority of members will try to save money by seeking discounts and specials on entertainment

- Only about 1-in-5 members do not plan on changing their entertainment plans at all this spring season.



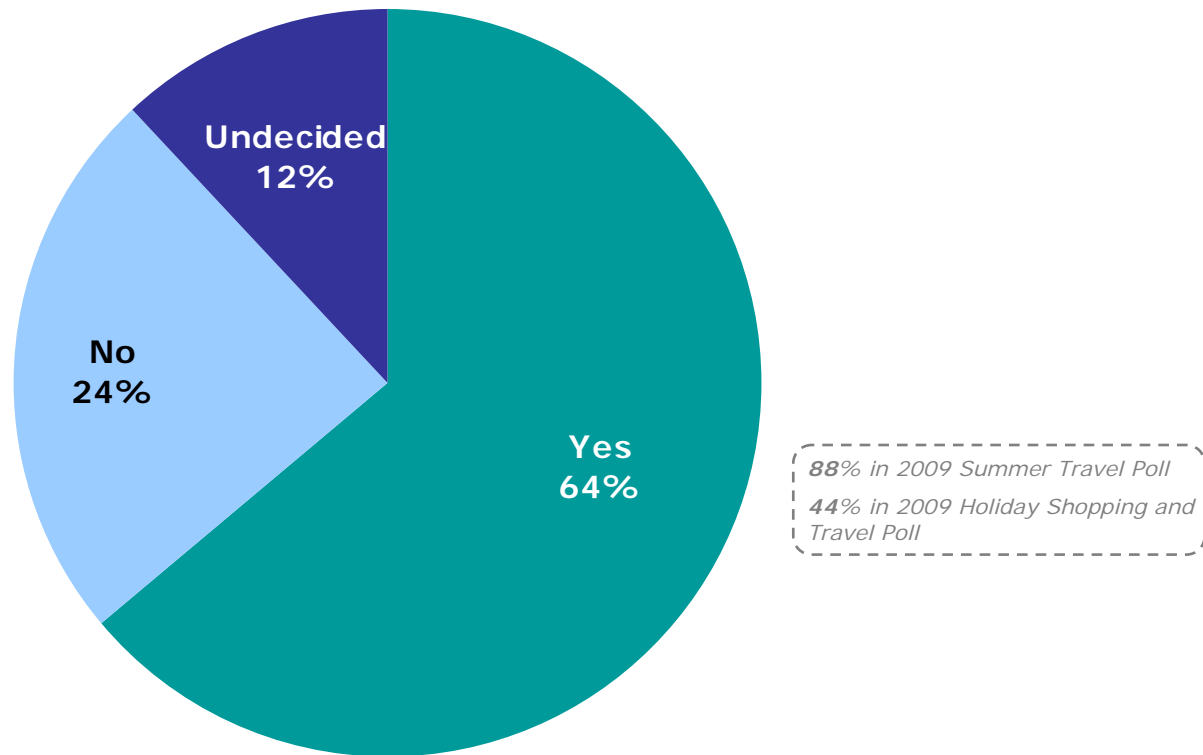
Q5: "How are you planning to change your entertainment plans during the 2010 spring season, if at all? (Select all that apply)."

Base: Member households in Southern California.

# Nearly two-thirds of members will travel this spring

- Another 12% have still not decided if they will take a leisure trip or not this spring season.

Plan to take at least one leisure trip?



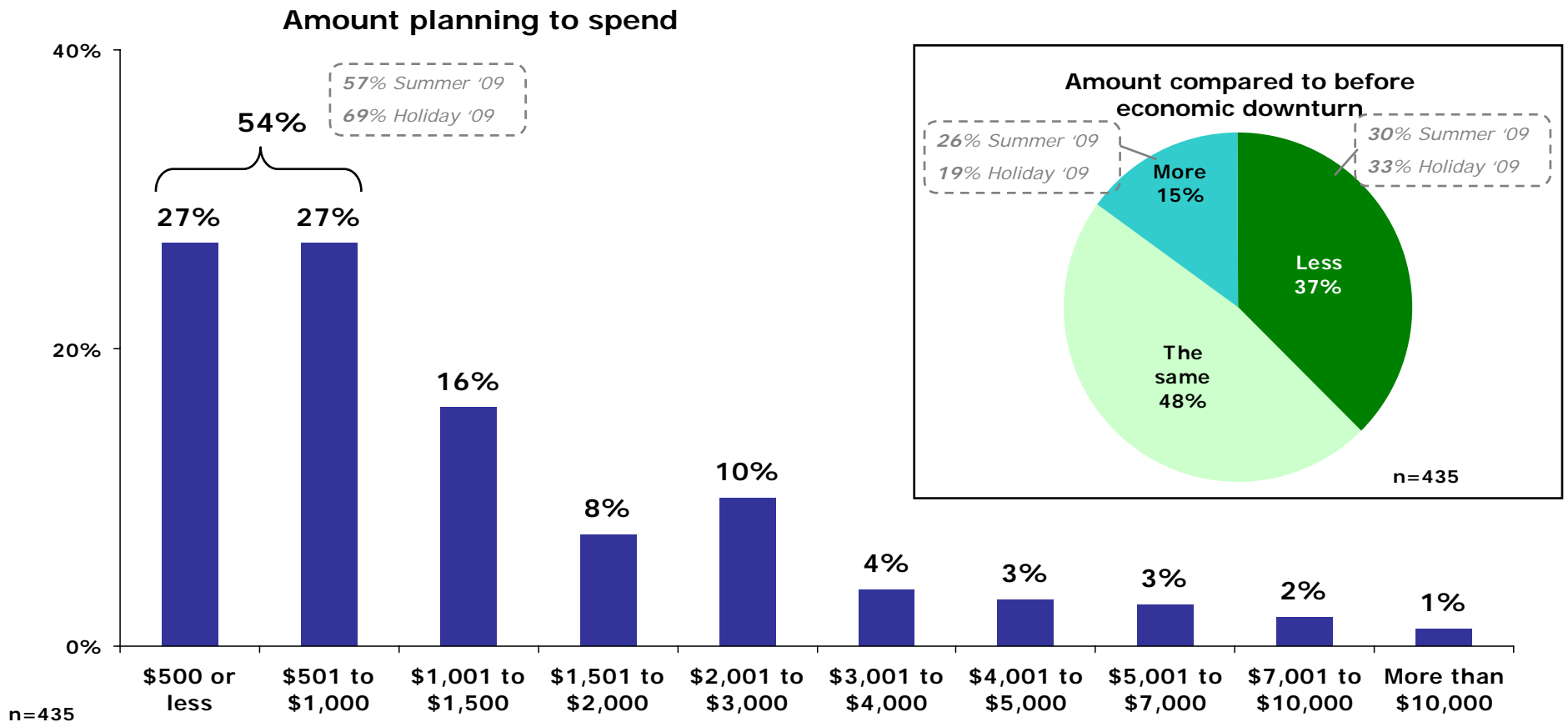
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Q6: "During the 2010 spring season, do you plan to take at least one leisure trip of more than 50 miles one way from home and requiring an overnight stay?"

Base: Member households in Southern California.

# Nearly half (46%) of members planning a trip will spend more than \$1000

- More than a third say that the amount they plan to spend this spring season is less than they would prior to the economic downturn.



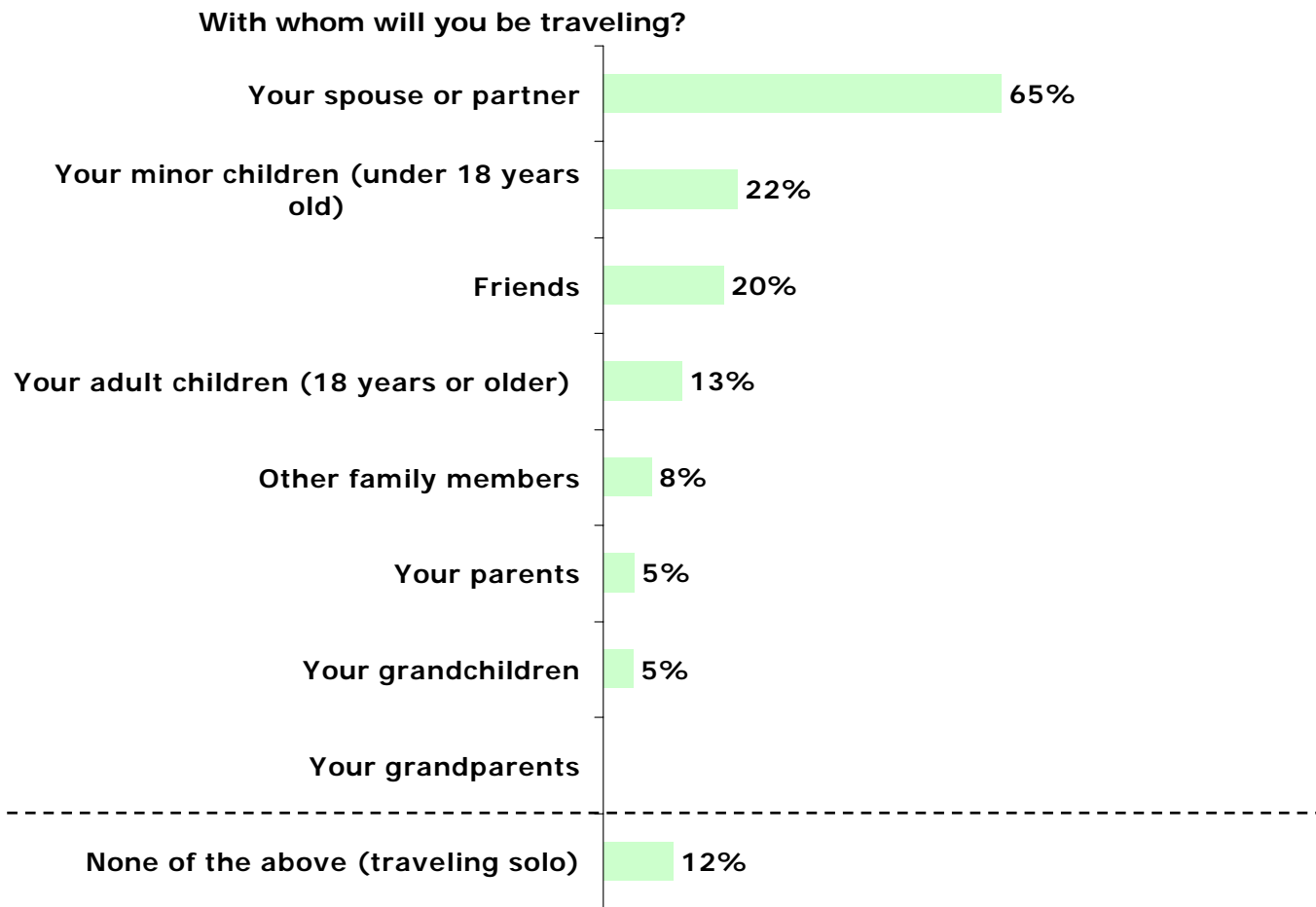
Q7: "About how much do you expect to spend on leisure travel during the 2010 spring season? (Include lodging, transportation, meals, and entertainment)."

Q8: "You indicated that you expect to spend about "[insert amount from Q7]" during the 2010 spring season. How does this amount compare to your spring travel spending in years prior to the current economic downturn?"

Base: Member households in Southern California taking at least one leisure trip during the 2010 spring season.

# Nearly two-thirds of those traveling this spring will be accompanied by their spouse or partner

- About 1-in-5 spring travelers will be accompanied by their minor children.



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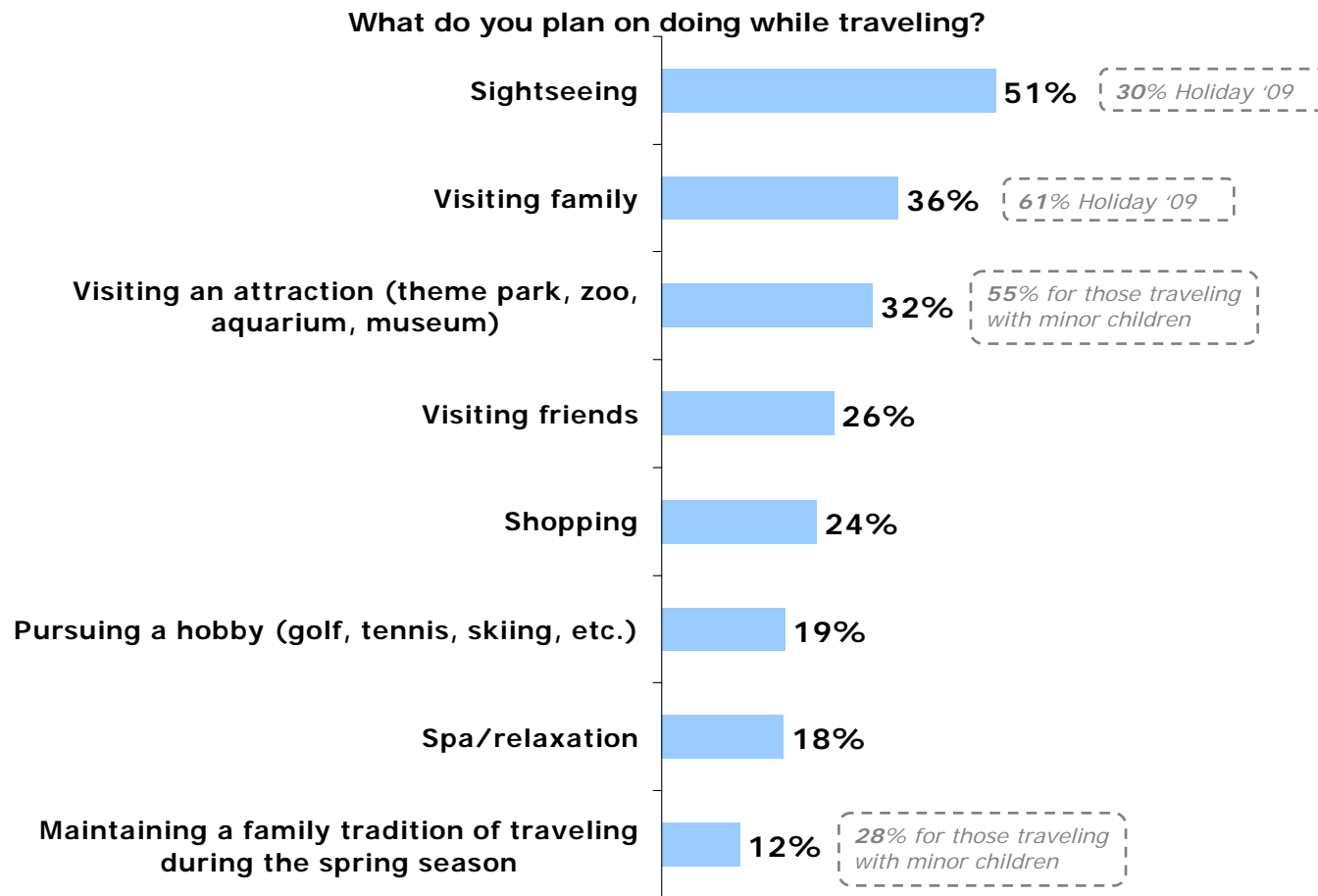
Q11: "With whom will you be traveling? (Select all that apply)."

Base: Member households in Southern California taking at least one leisure trip during the 2010 spring season.



# About half of those traveling will be sightseeing on their trip

- 'Visiting family' and 'Visiting an attraction' were also common responses.



n=435

Q12: "What do you plan on doing while traveling during the 2010 spring season? (Select all that apply)."

Base: Member households in Southern California taking at least one leisure trip during the 2010 spring season.

# More than half of those taking a trip will travel in state

- Nearly as many Southern Californians (45%) will travel to another U.S. state.



n=435

Q13: "To where are you planning to travel during the 2010 spring season? (Select all that apply)."

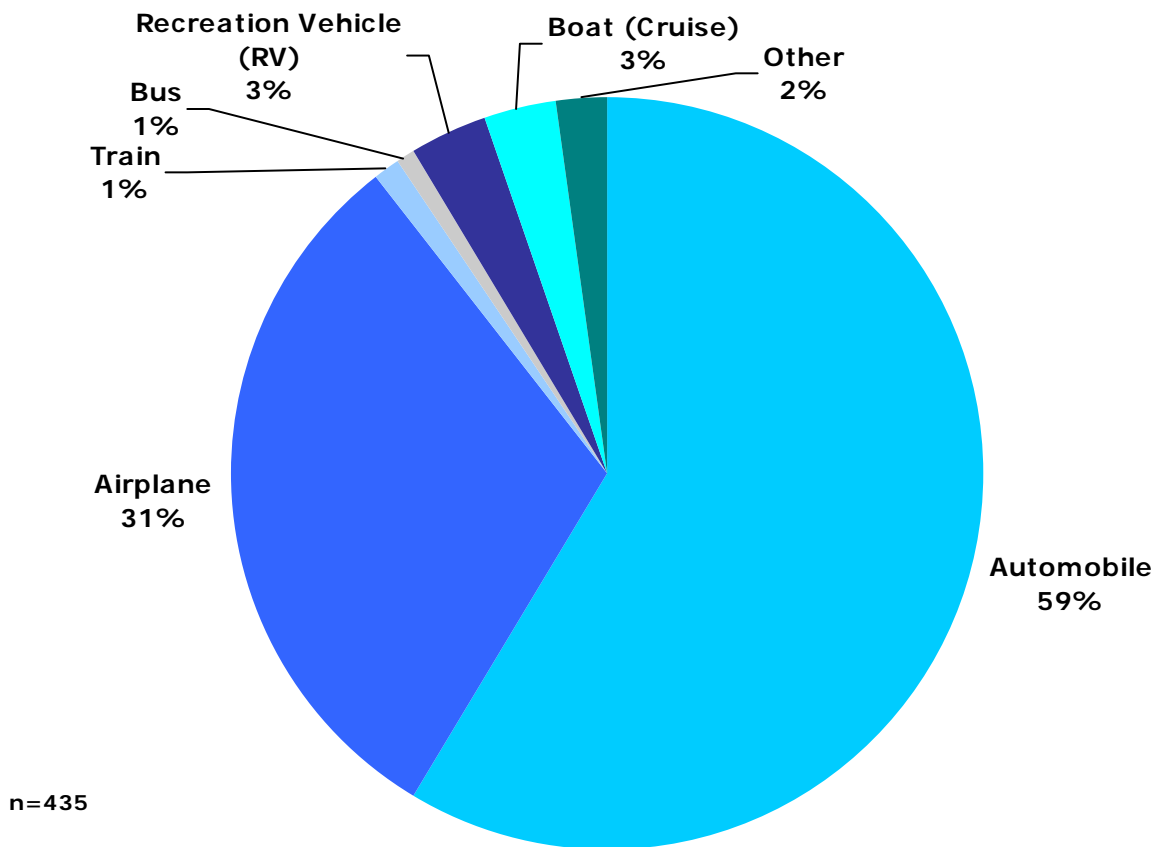
Base: Member households in Southern California taking at least one leisure trip during the 2010 spring season.

# The majority of members taking a trip will travel by automobile

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- About one-third will take a flight to their destination.

What type of transportation will be used?

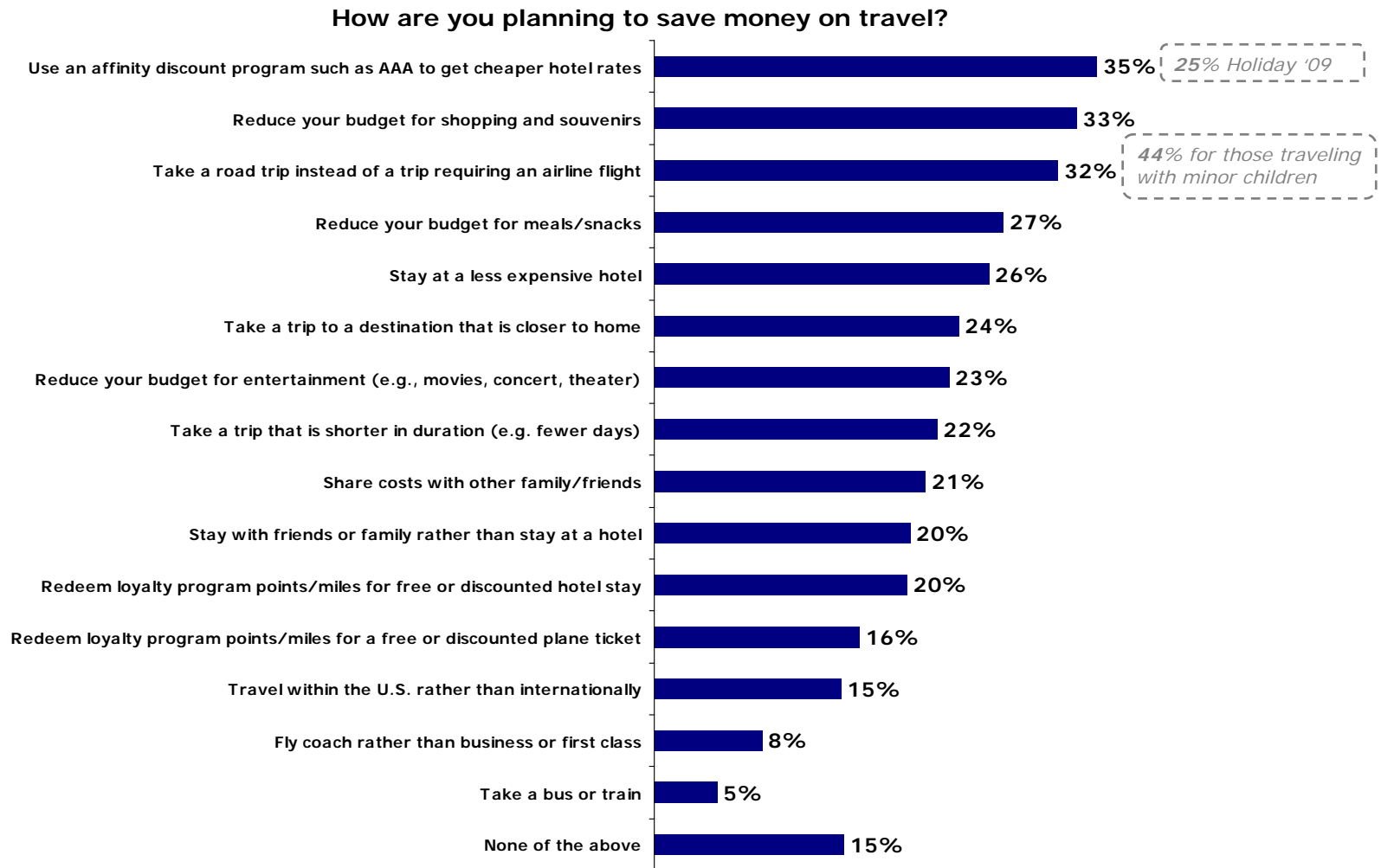


Q14: "What type of transportation will be primarily used to reach your destination?"

Base: Member households in Southern California who are planning to take at least one trip this spring season.

# More than one-third of members traveling this spring plan to save money by using an affinity program like AAA

- 30% stated they will take a road trip instead of a trip requiring an airline flight to save money.

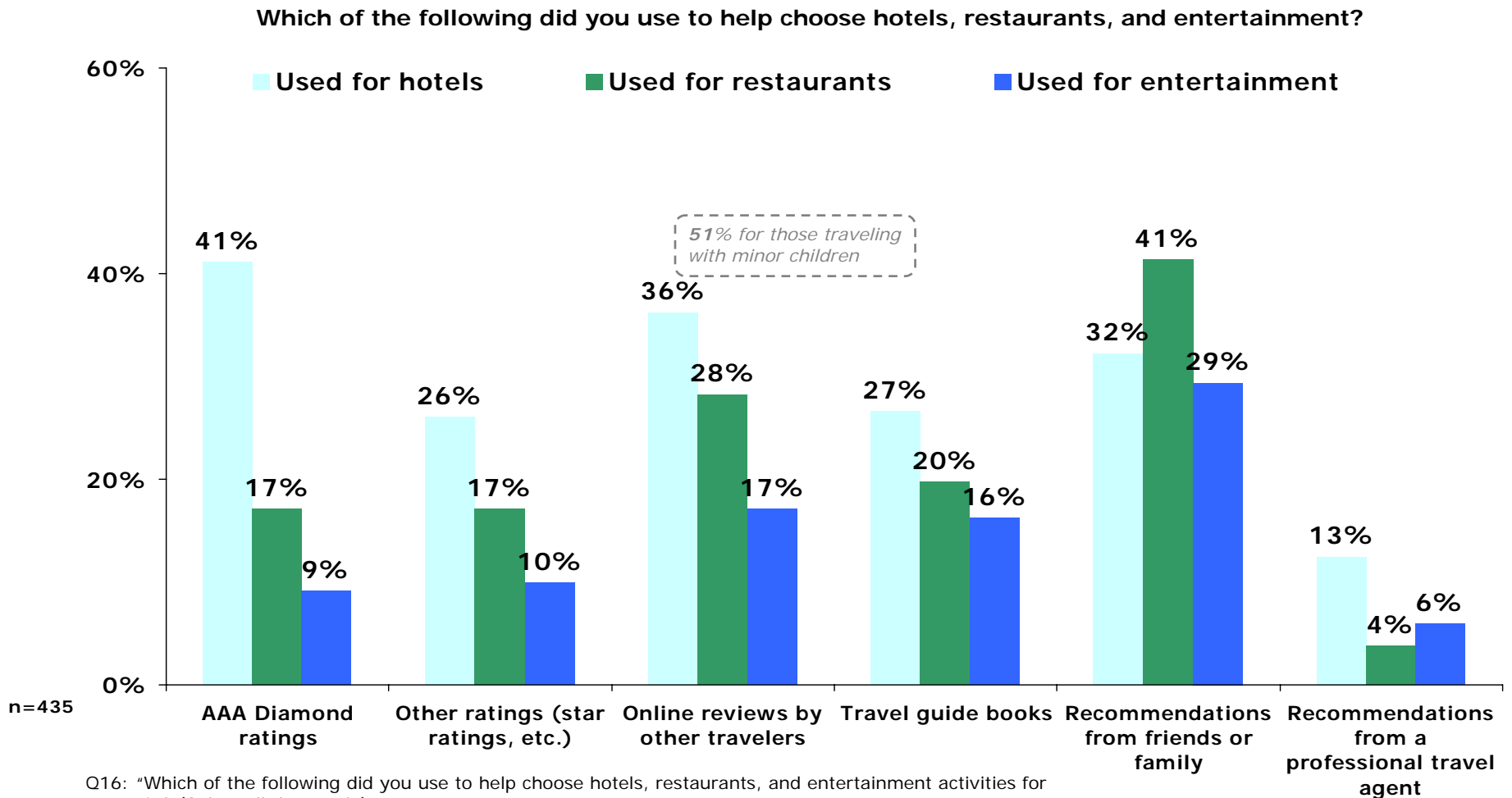


Q15: "How are you planning to save money on travel during the 2010 spring season, if at all? (Select all that apply)."

Base: Member households in Southern California taking at least one leisure trip during the 2010 spring season.

# Members predominantly used AAA Diamond ratings and online reviews to select their hotel

- Restaurants and entertainment were usually selected using recommendations from friends or family.

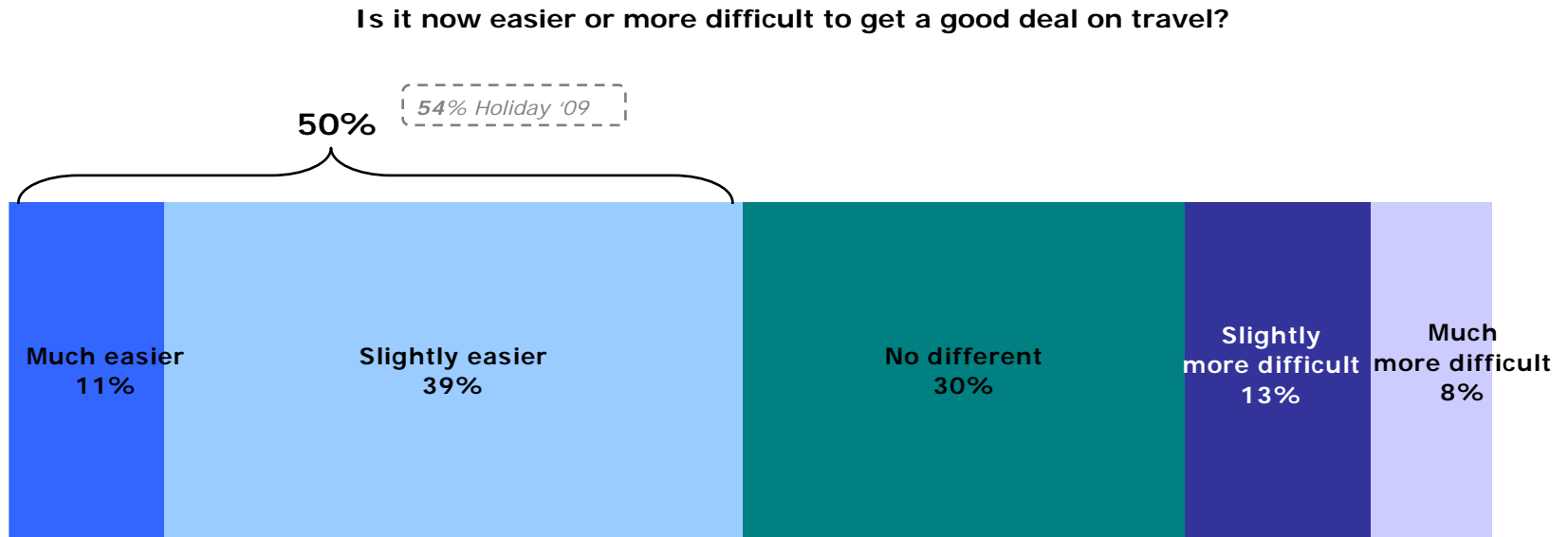


Q16: "Which of the following did you use to help choose hotels, restaurants, and entertainment activities for your trip? (Select all that apply)."

Base: Member households in Southern California taking at least one leisure trip during the 2010 spring season.

# One-half of members believe that it is now easier to get a good deal on travel

- Only 29% believe it is now more difficult to get a good deal on travel.



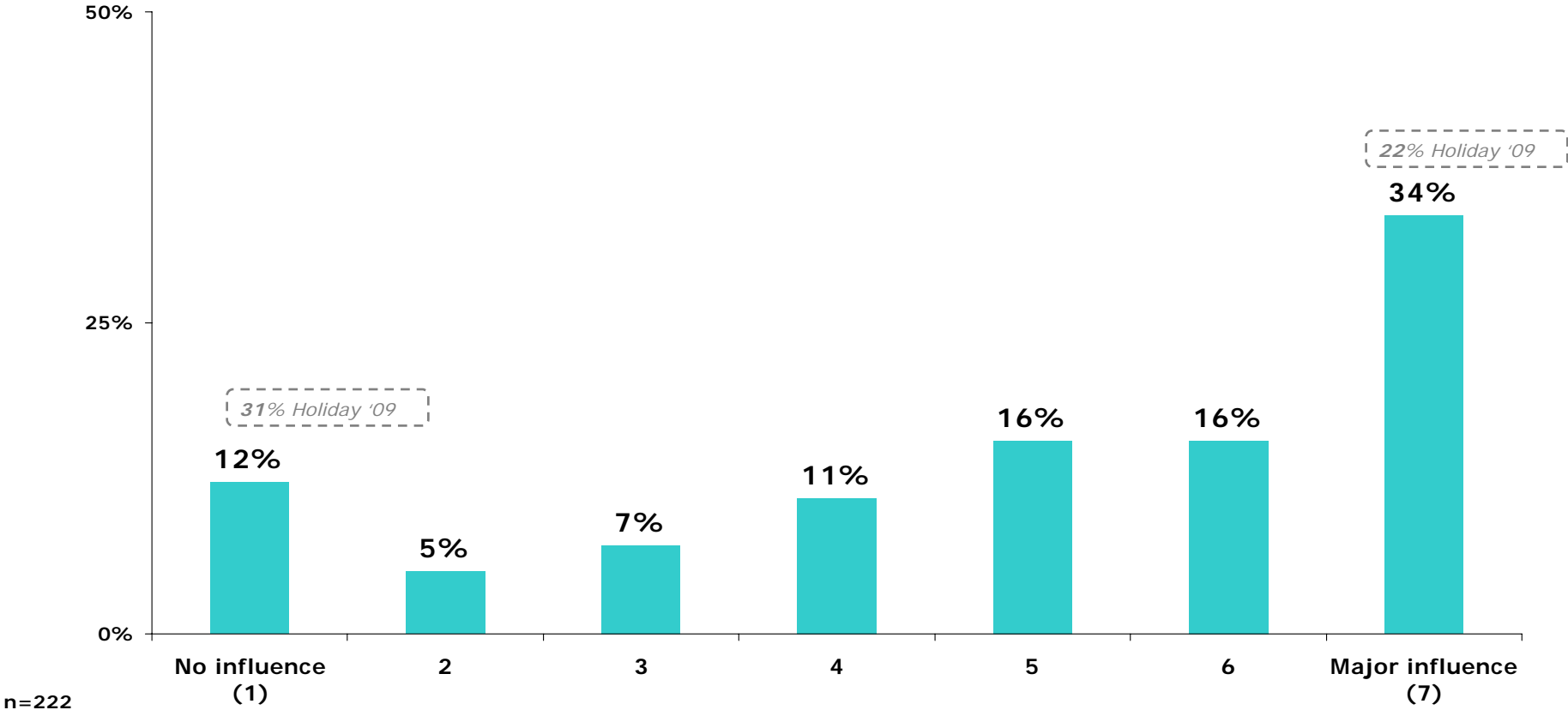
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Q17: "Compared to years prior to the current economic downturn, would you say it is now easier or more difficult to get a good deal on travel?"

Base: Member households in Southern California.

# About one-third of non-travelers say the economic downturn was a major influence on their decision

- Only about 1-in-10 of non-traveling members say that the economic downturn had no influence on their decision not to take a trip this spring season.

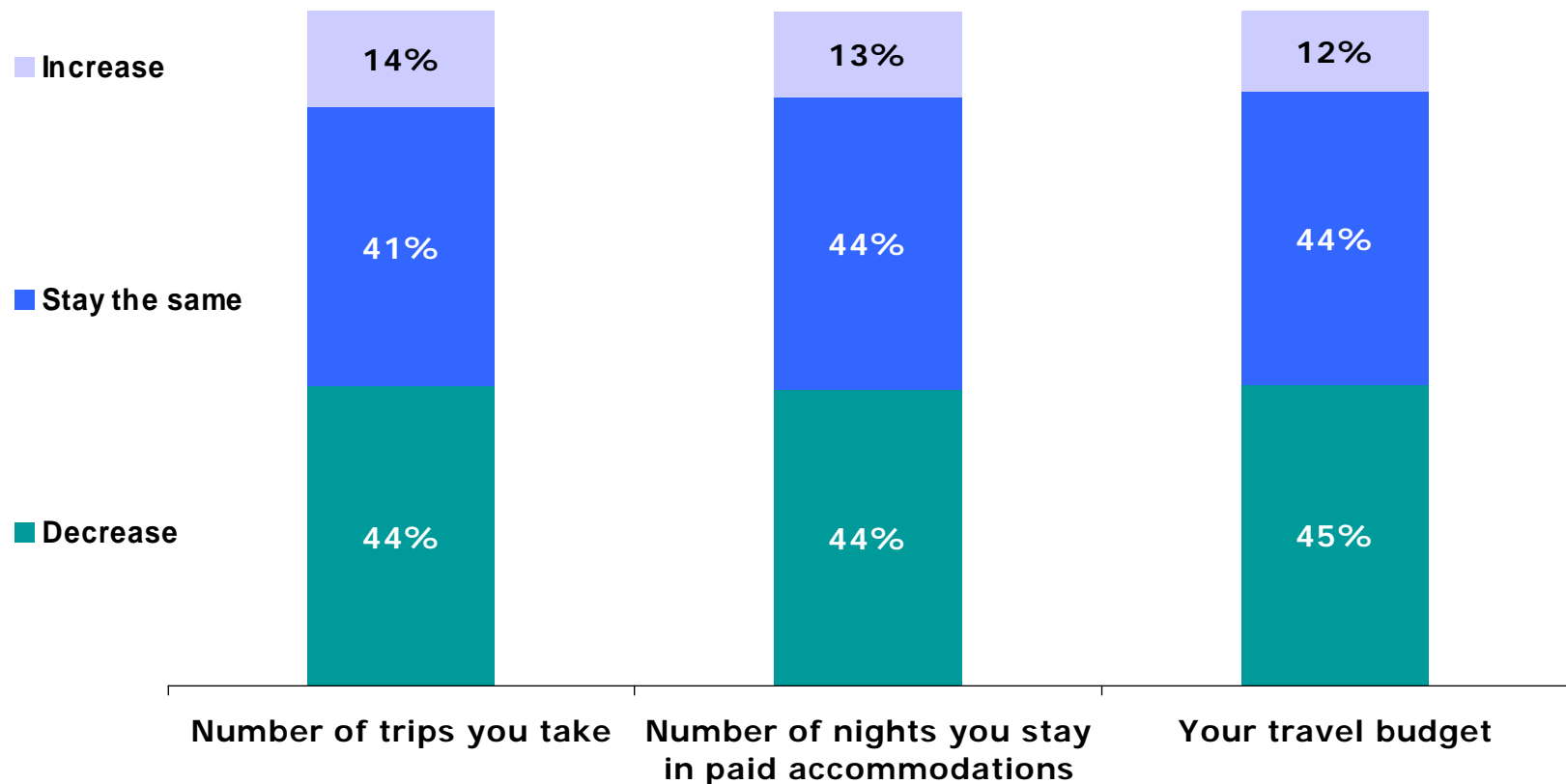


Q18: "You mentioned that you will not take a trip or have not decided if you will take a trip during the 2010 spring season. To what extent has the current economic downturn influenced your decision? Use a scale of 1 to 7 where 1 means the economic downturn has had no influence and 7 means it has been a major influence on your decision."

Base: Member households in Southern California who are not planning to take a trip this spring season or are undecided.

# Members are still cautious about traveling

- Nearly one-half of members plan to cut back on travel over the next 12 months.



n=659

Q19: "Please indicate below whether you expect the number of trips you take, number of nights you stay in paid accommodations, and your travel budget will increase, decrease, or remain the same over the next 12 months."

Base: Member households in Southern California.