



AAA Member Poll

2012 Spring Break Travel and Entertainment

Auto Club of Southern California

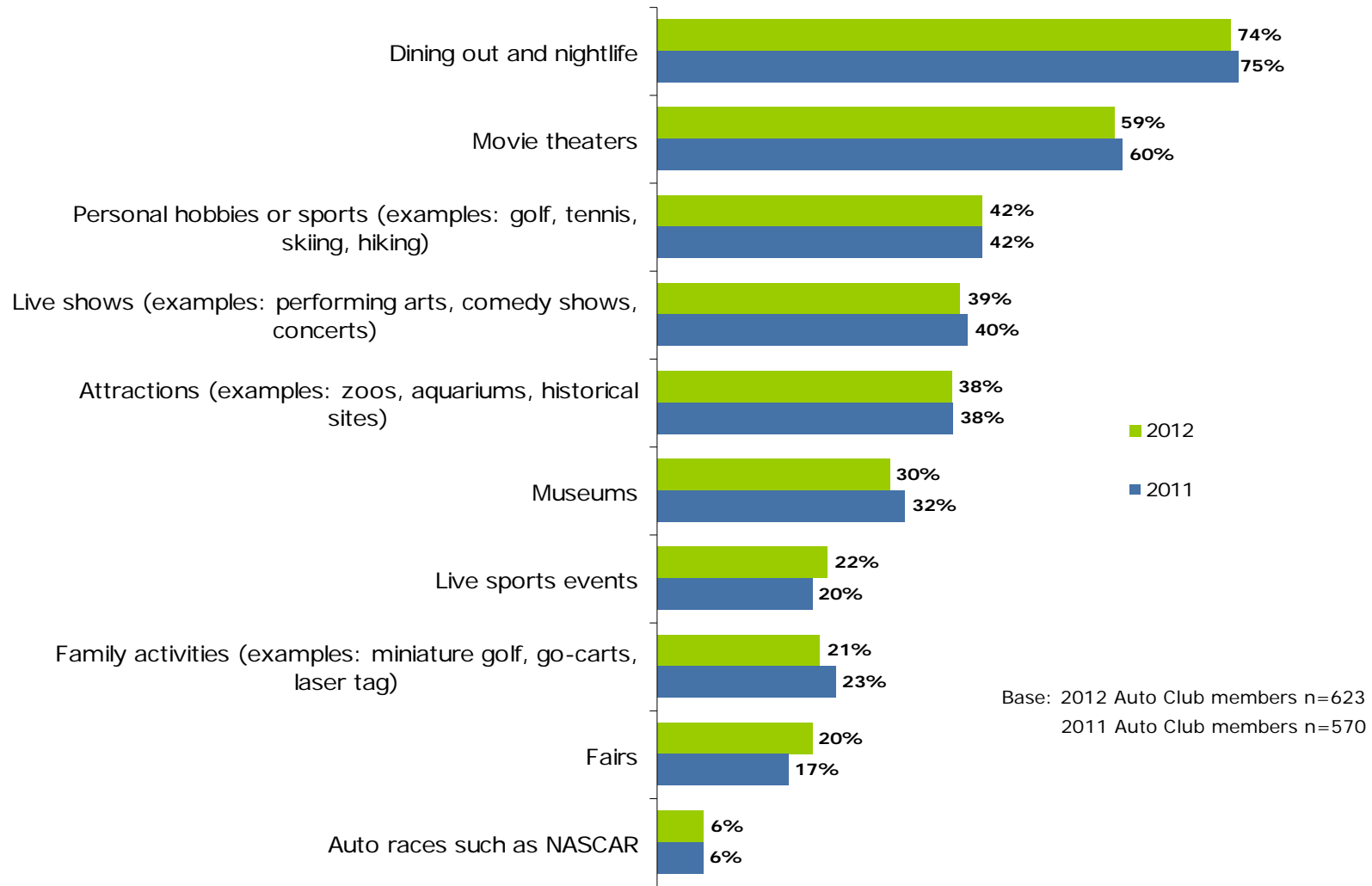
March 2012

Methodology

- An online survey was sent to Automobile Club of Southern California members who participate in our online research panel "AAA Insiders."
- The survey was conducted from February 13-23, 2012.
- 623 Auto Club members completed the survey.
- Responses are weighted to represent the ages of members.
- The survey margin of error is +/-3.9 percent. Differences between 2012 and 2011 results were tested for statistical significance at a 95% confidence level.

“In which entertainment categories do you plan to spend money during the 2012 spring season?”

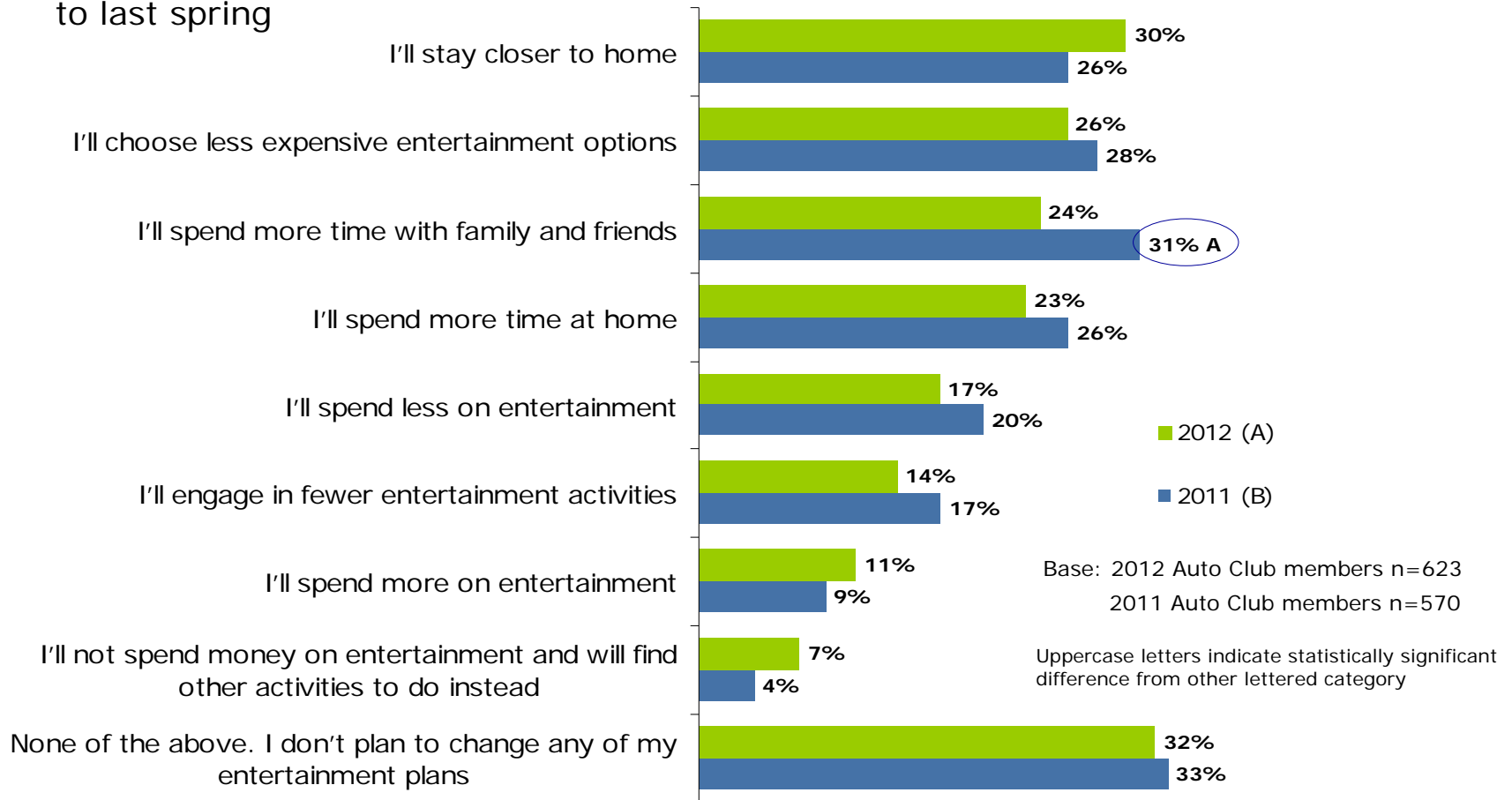
- For the majority of Auto Club members, dining out and nightlife will be the entertainment they are most likely to spend on, followed by movies



Q: “In which of the entertainment categories below do you plan to spend money during the 2012 spring season?” Multiple responses allowed.

“How are you planning to change your entertainment activities during the 2012 spring season compared to last year?”

- Similar to 2011, a third of Auto Club members don't plan to change their entertainment activities during the 2012 spring season
- Significantly fewer members plan to spend more time with family and friends compared to last spring



Q: “How are you planning to change your entertainment activities during the 2012 spring season compared to last year?”
Multiple responses allowed.

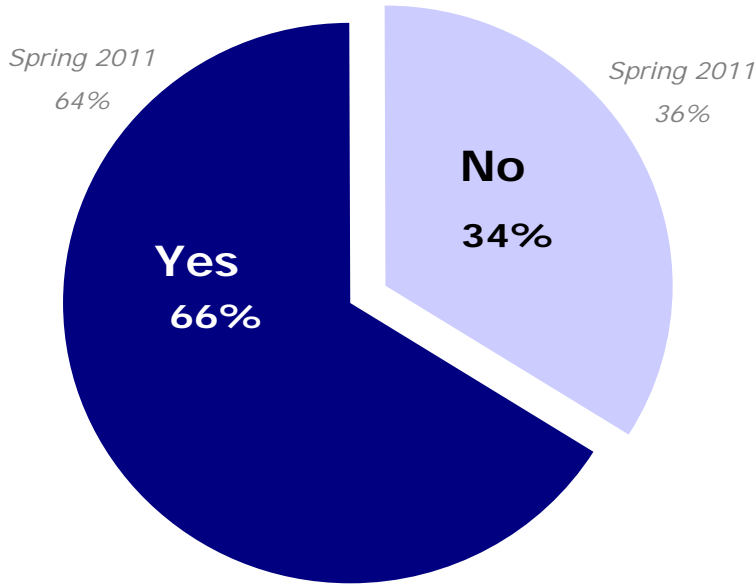
Gas Prices Affect Budgets of Auto Club Members

- Two-thirds of Auto Club members say their household budget has been affected by recent high gas prices
- More members now see \$4.50-\$5 per gallon as the price that makes them make changes in their gas consumption

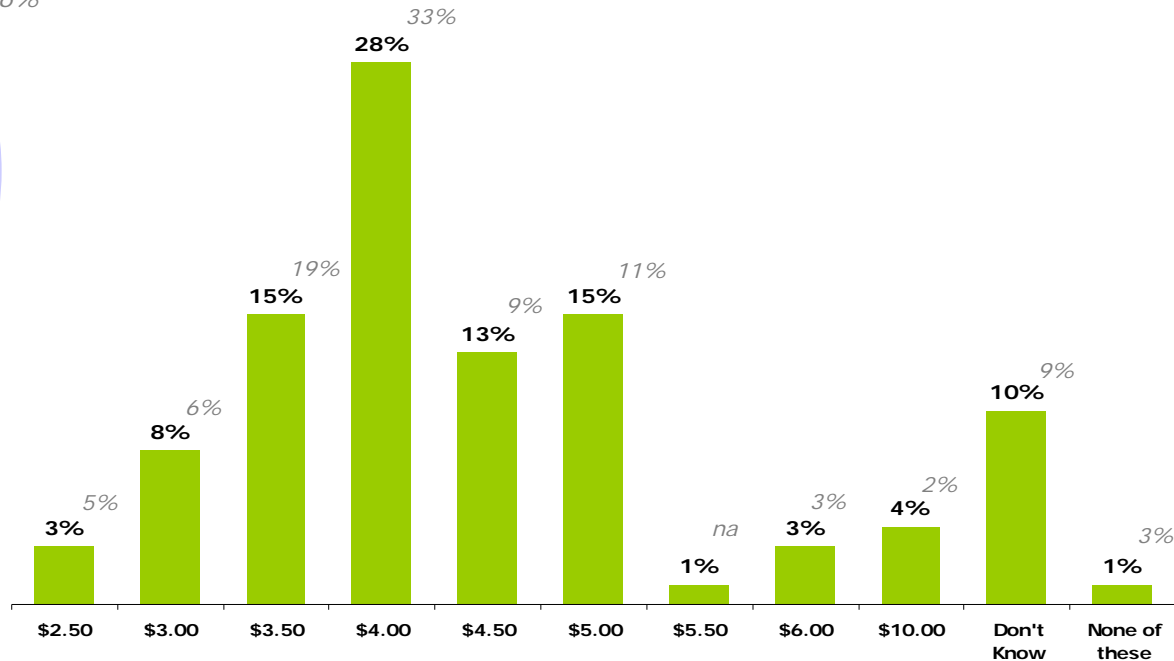
Auto Club of Southern California

"Have the recent high gasoline prices affected your household budget?"

"At approximately what price per gallon of gas do you think you will start making major changes in how much you drive or how much gasoline you use?"

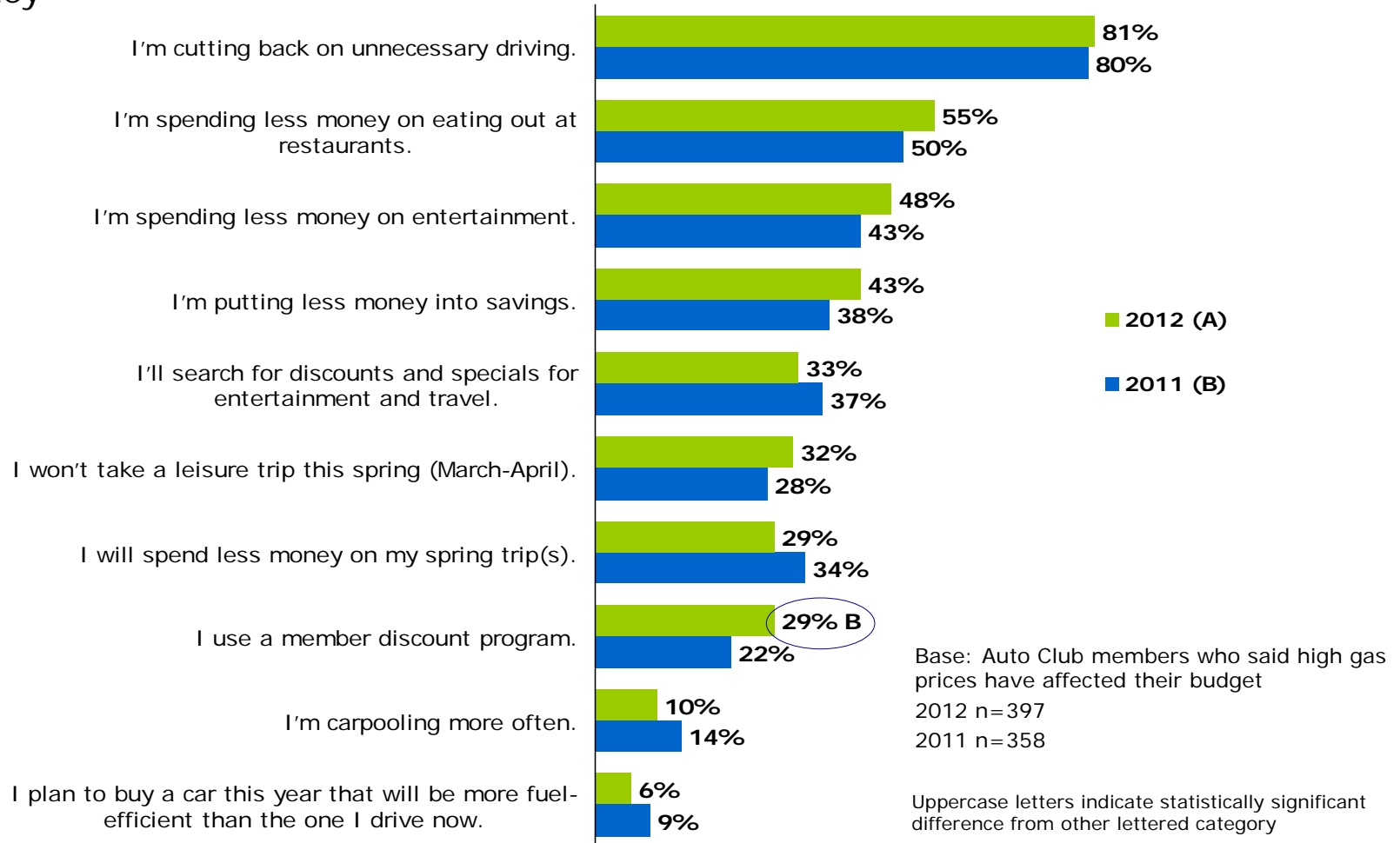


Base: 2012 Auto Club members n=623
2011 Auto Club members n=570



“How have gas prices affected your spending decisions?”

- 8 in 10 Auto Club members affected by the high gas prices are cutting back on their driving and more than half are spending less on eating out at restaurants
- Significantly more this year say they are using member discount programs to save money



Q: “How have gas prices affected your spending decisions?” Multiple responses allowed.

“Do you plan to visit any of these theme parks during this spring season or later this year?”

- About 4 in 10 Auto Club members will visit a theme park during the spring break
- Half of Auto Club members may visit Disneyland at some time this year

	Yes, this Spring (March-April)	Possibly after April	Not this year
Disneyland in So. Calif.	16%	34%	50%
Disney World in Florida	0%	4%	96%
Universal Studios Hollywood	6%	18%	76%
Universal Studios Orlando	1%	4%	95%
Six Flags Magic Mountain	1%	13%	86%
Six Flags Over Texas	0%	1%	99%
Knott’s Berry Farm in So. Calif.	5%	26%	69%
Legoland	4%	11%	85%
Busch Gardens	1%	2%	97%
SeaWorld	4%	27%	69%
Any other theme park	3%	11%	86%

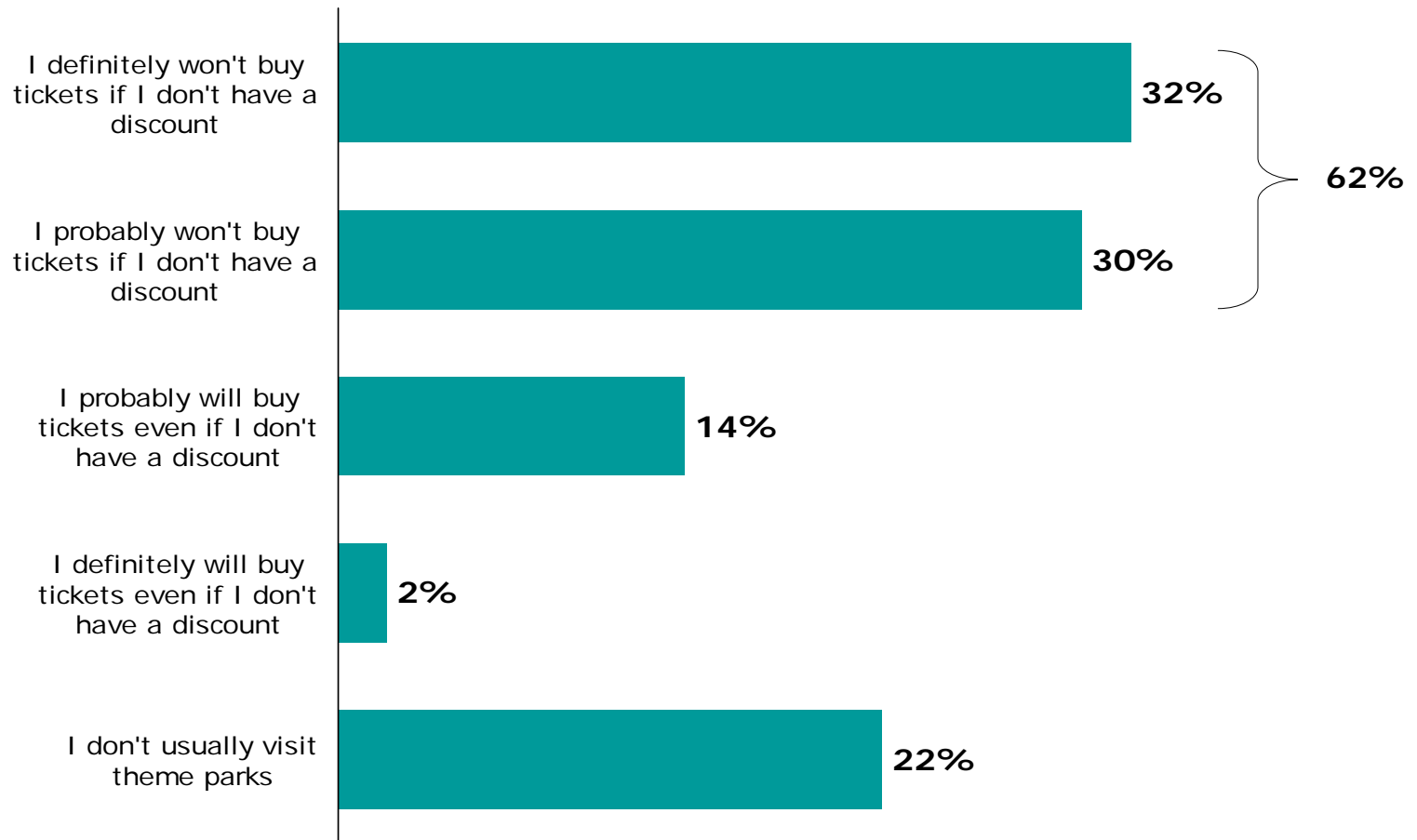
Base: Auto Club members n=623

Not asked in 2011

Q: “Do you plan to visit any of the following theme parks during this spring season or later this year?”

“How likely are you to purchase tickets for a theme park if you do not have a discount or promotional offer?”

- 6 in 10 Auto Club members (62%) want discounts or promotional offers for theme park tickets
- About 1 in 5 (22%) are not in the theme park audience



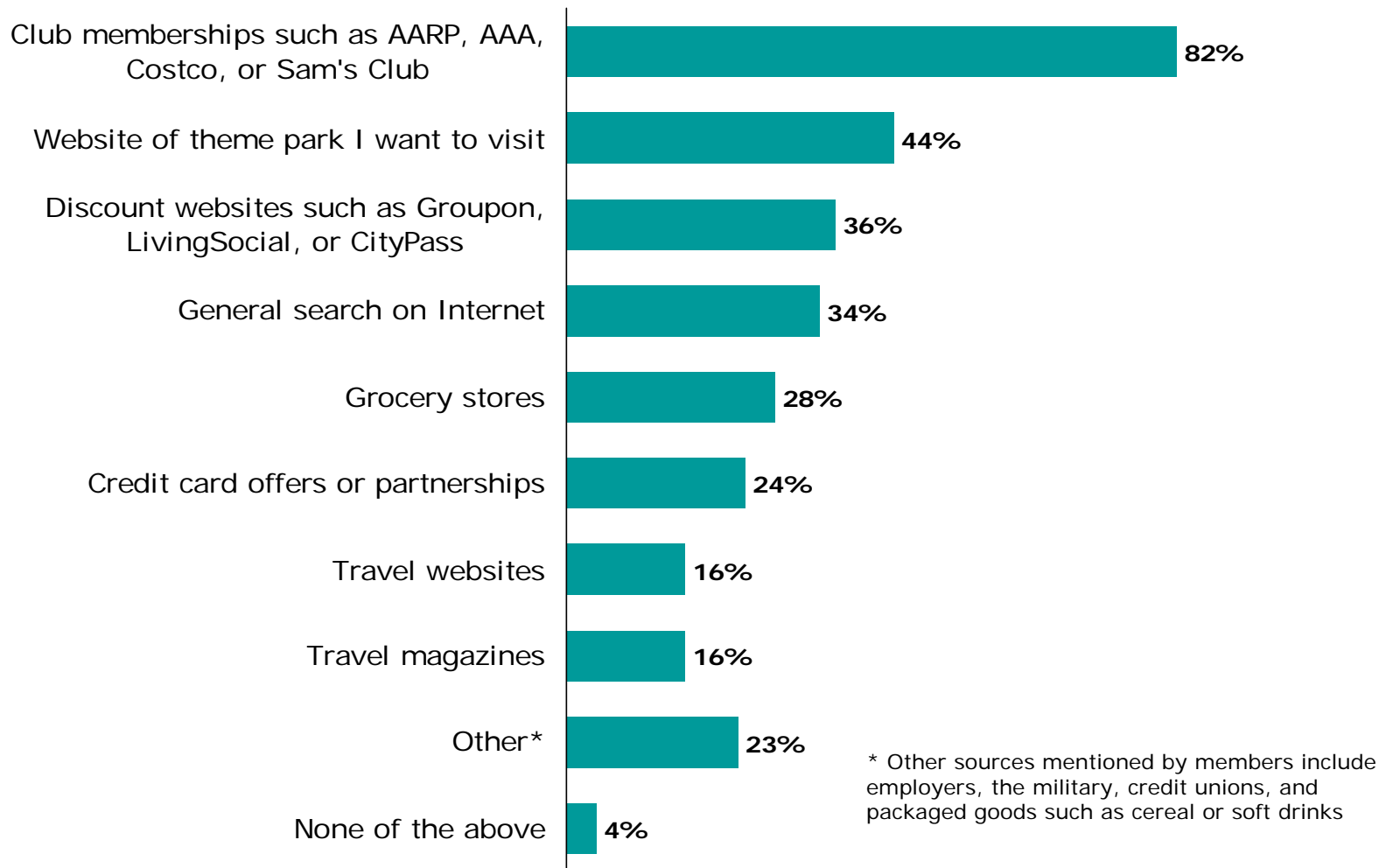
Base: Auto Club members n=623

Not asked in 2011

Q: “How likely are you to purchase tickets for a theme park such as Disneyland, Universal Studios, or Six Flags if you do not have a discount or promotional offer?”

“Where do you find discounts or promotional offers for theme park tickets?”

- Club memberships are the most common source of discounts and offers for theme park tickets



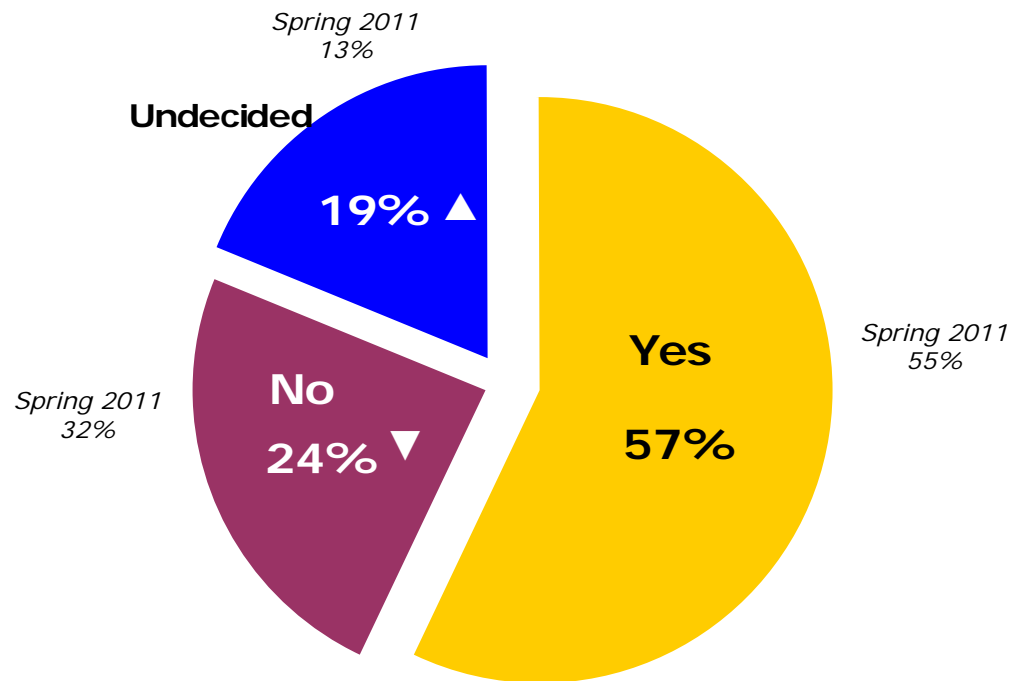
Base: Auto Club members who buy tickets for theme parks n=422

Not asked in 2011

Q: “Where do you find discounts or promotional offers for theme park tickets?” Multiple responses allowed.

“During the 2012 spring season, do you plan to take at least one leisure trip?”

- Significantly more Auto Club members are undecided about taking a leisure trip this spring compared to last spring (19% vs 13%), but the number of those planning a trip stayed about the same (57% vs 55%)



▼ ▲ Indicates significant difference from previous year

Base: 2012 Auto Club members n=623

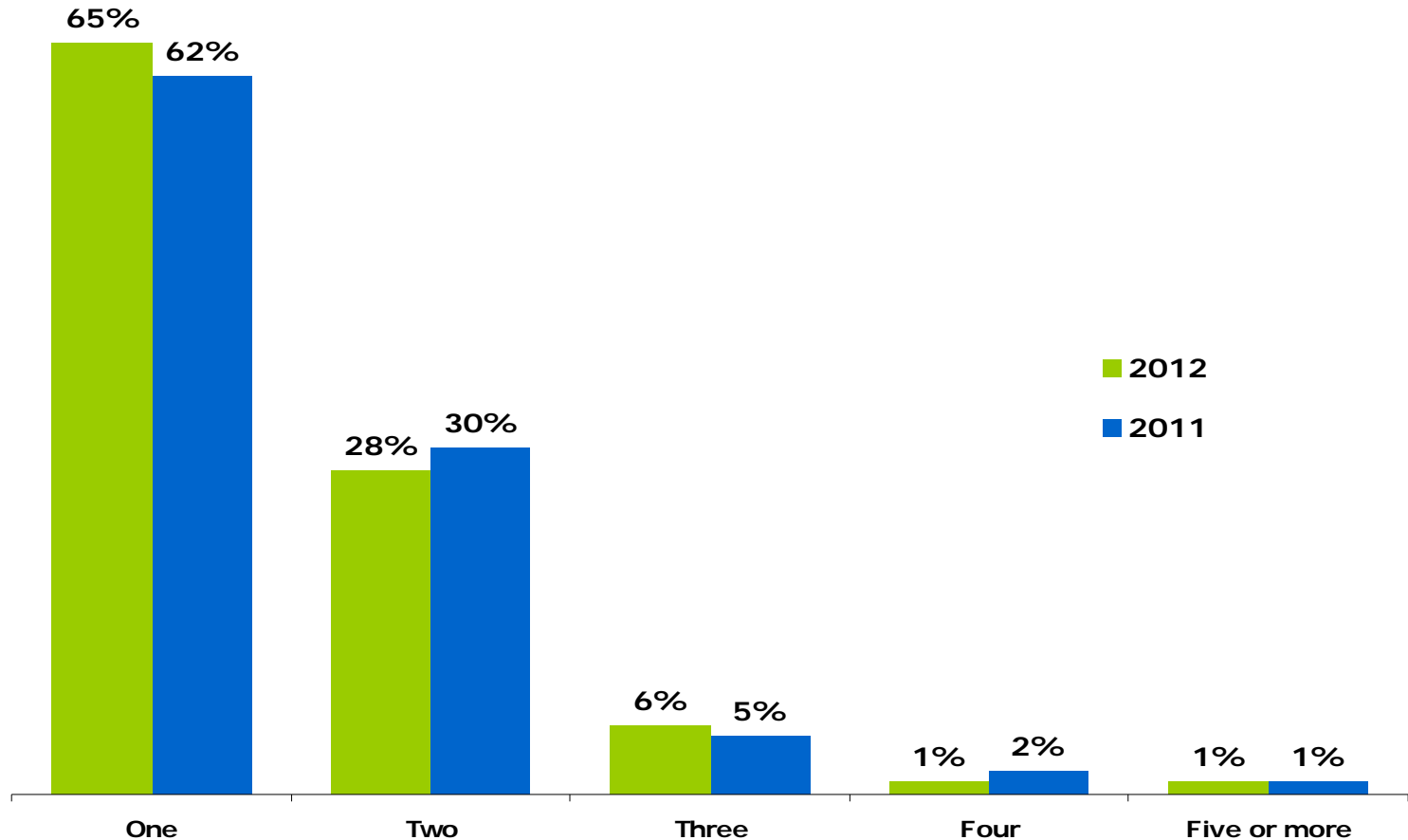
2011 Auto Club members n=570

Q: “During the 2012 spring season, do you plan to take at least one leisure trip?”

“Leisure trip” for this survey is defined as “a non-business trip of more than 50 miles one way from home and requiring at least one overnight stay.”

"How many leisure trips are you likely to take in March and April?"

- Auto Club members who are traveling this spring are planning to take about the same number of trips they did in the spring season of 2011



Base: Auto Club who are planning to travel during spring season

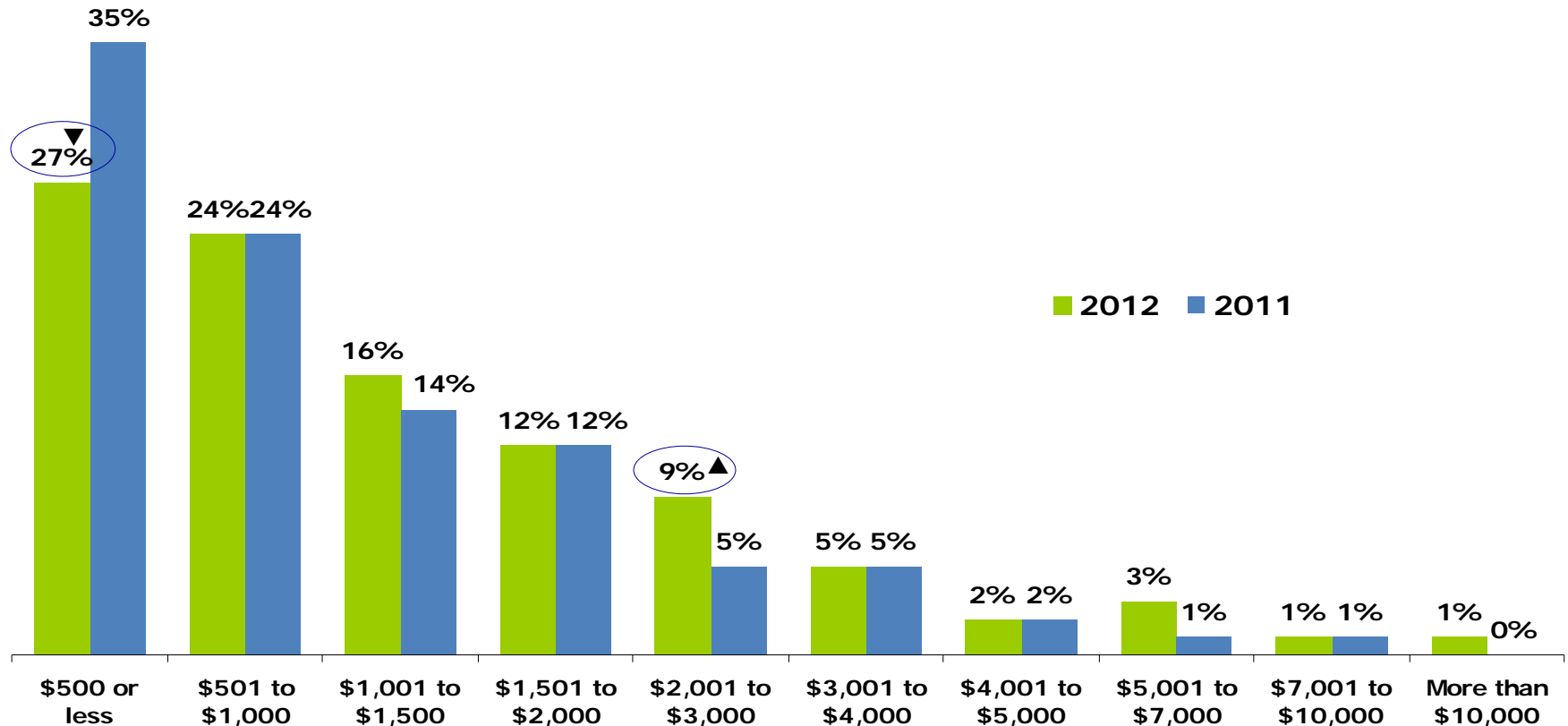
2012 n=340

2011 n=313

Q: "How many leisure trips are you likely to take in March and April?"

“About how much do you expect to spend on all your leisure travel during the 2012 spring season?”

- Significantly more Auto Club members who will travel this spring plan to spend in the \$2,001-\$3,000 range compared to 2011, and fewer plan to spend \$500 or less
- There is also a directional increase in plans to spend \$5,000 or more during the season



▼ ▲ Indicates significant difference from previous year

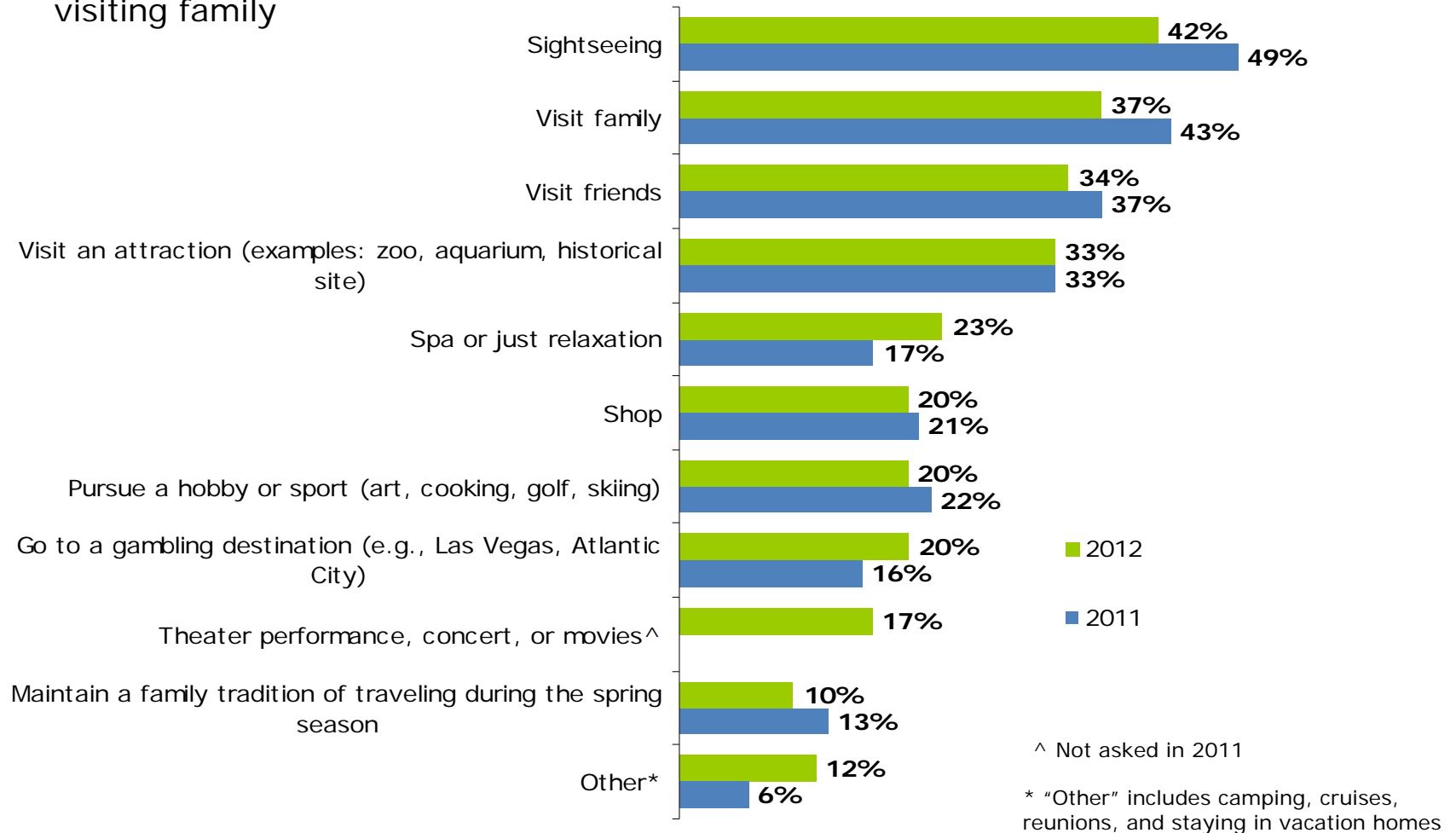
Base: 2012 Auto Club members who plan to take a leisure trip during spring season n=340

2011 Auto Club members who plan to take a leisure trip during spring season n=313

Q: “About how much do you expect to spend on all your leisure travel during the 2012 spring season, including lodging, transportation, meals and entertainment?”

“What do you plan on doing while traveling during the 2012 spring season?”

- Although not significantly different from Spring 2011, slightly more Auto Club members will be visiting a spa, just relaxing, or going gambling, and fewer plan sightseeing or visiting family

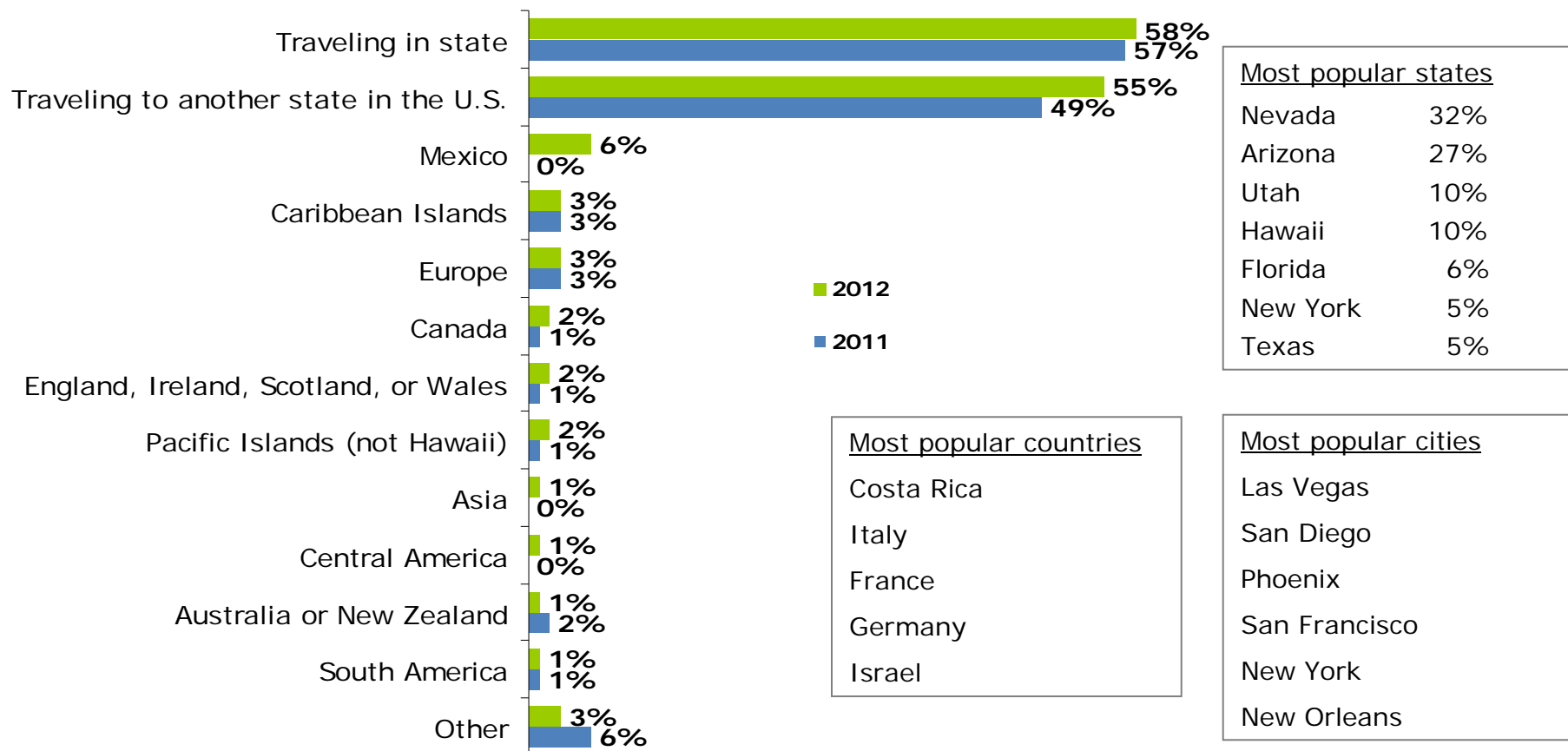


Base: 2012 Auto Club members who plan to take a leisure trip during spring season n=340
 2011 Auto Club members who plan to take a leisure trip during spring season n=313

Q: “What do you plan on doing while traveling during the 2012 spring season?” Multiple responses allowed.

“What travel destinations do you plan on for the 2012 spring season?”

- As in 2011, more than half of Auto Club members who are traveling this spring season will visit places in California, and almost as many will travel to other states

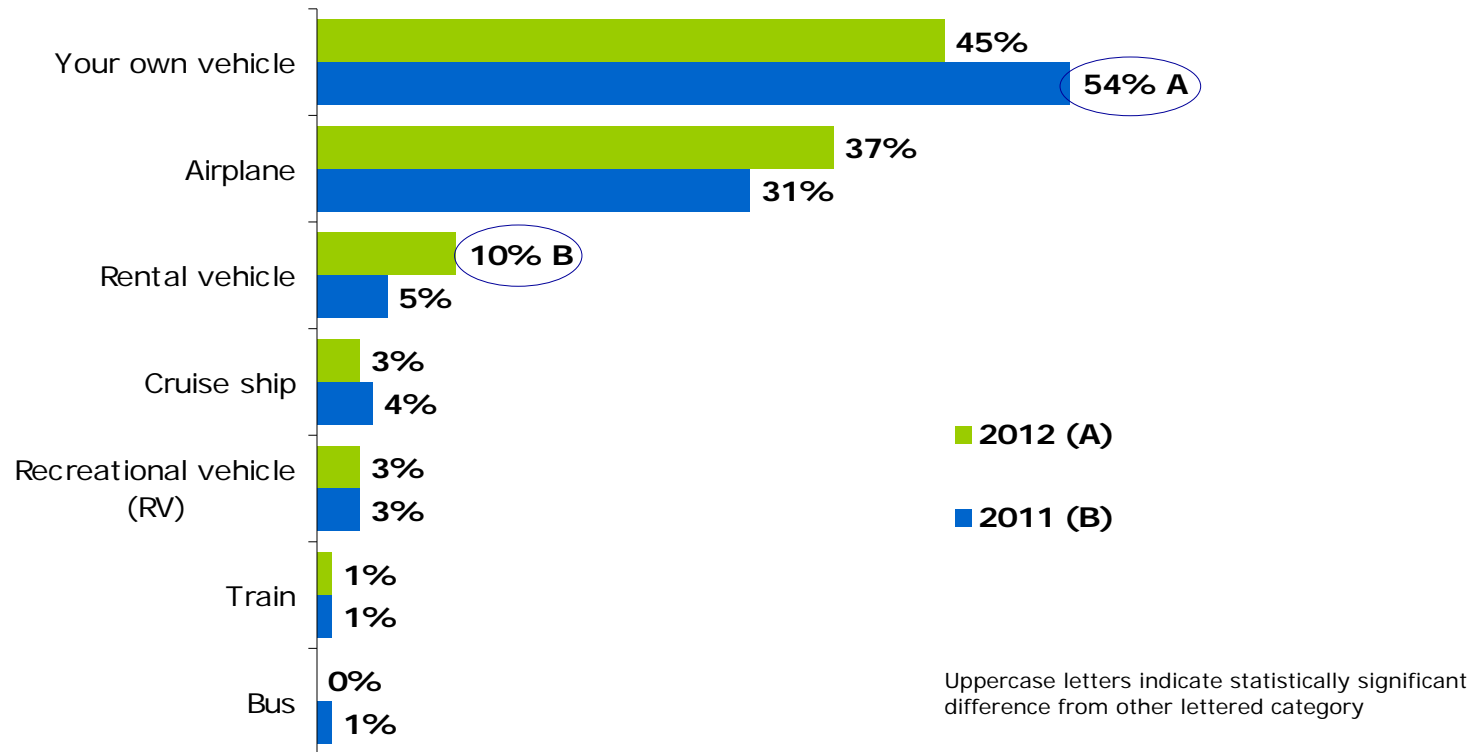


Base: 2012 Auto Club members who plan to take a leisure trip during spring season n=340
 2011 Auto Club members who plan to take a leisure trip during spring season n=313

Q: “What travel destinations do you plan on for the 2012 spring season?” Multiple responses allowed.

“What will your primary form of transportation be to your destination?”

- Despite the high number of members traveling in California, significantly fewer of them will be driving their own vehicles for their longest trip
- Significantly more will be renting a vehicle for that trip

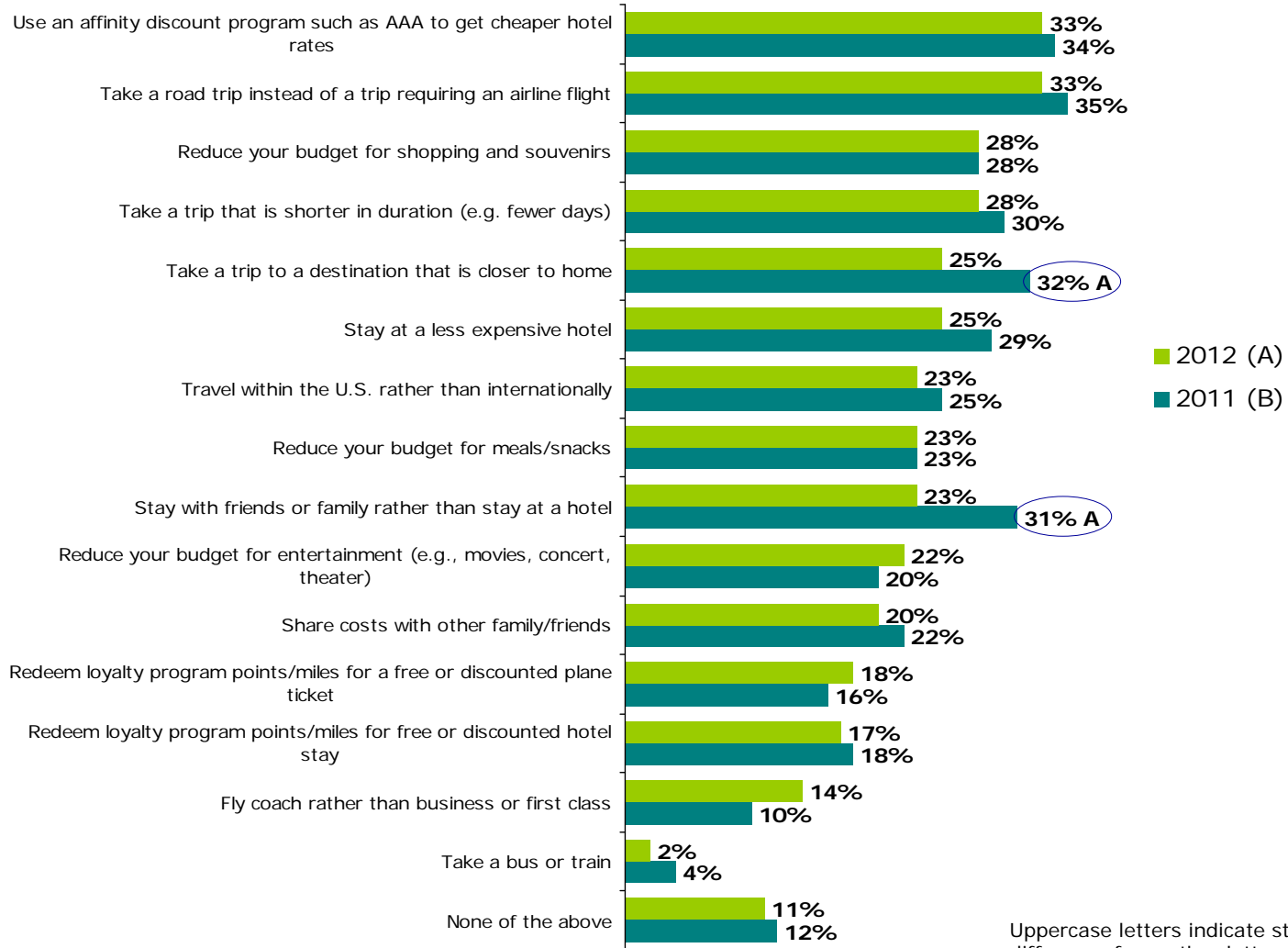


Base: 2012 Auto Club members who plan to take a leisure trip during spring season n=340
2011 Auto Club members who plan to take a leisure trip during spring season n=313

Q: “For [your longest trip], what will be the primary type of transportation to reach your destination?”

“How are you planning to save money on your 2012 spring travel?”

- Significantly fewer Auto Club members will travel closer to home to save money this spring and fewer will stay with family or friends



Uppercase letters indicate statistically significant difference from other lettered category

Base: 2012 Auto Club members who plan to take a leisure trip during spring season n=340

2011 Auto Club members who plan to take a leisure trip during spring season n=313

Q: “How are you planning to save money on your 2012 spring travel, if at all?” Multiple responses allowed.

Demographics

	Auto Club
<i>Base</i>	<i>623</i>
Gender	
Male	56%
Female	44%
Age	
18-35	17%
36-49	27%
50-64	36%
65+	20%
Income	
<\$50,000	19%
\$50,000-\$74,999	16%
\$75,000-\$99,999	14%
\$100,000-\$149,999	17%
\$150,000 or more	11%
Prefer not to answer	23%