

Consumer Travel Pulse September Wave

ACKERMAN  MCQUEEN

September 2009

Methodology

Online survey fielded in March, June and September of 2009, to monitor consumers' travel behavior and compare results by travel period.

This third survey in the series was conducted September 12-14, 2009, among 528 vacationers/travel deciders (male/female).

All had to have taken a vacation or getaway weekend in 2007 or 2008 (or had to plan to take a vacation in 2009).

Matched the target of 25 to 64 years old (80% 25 to 54).

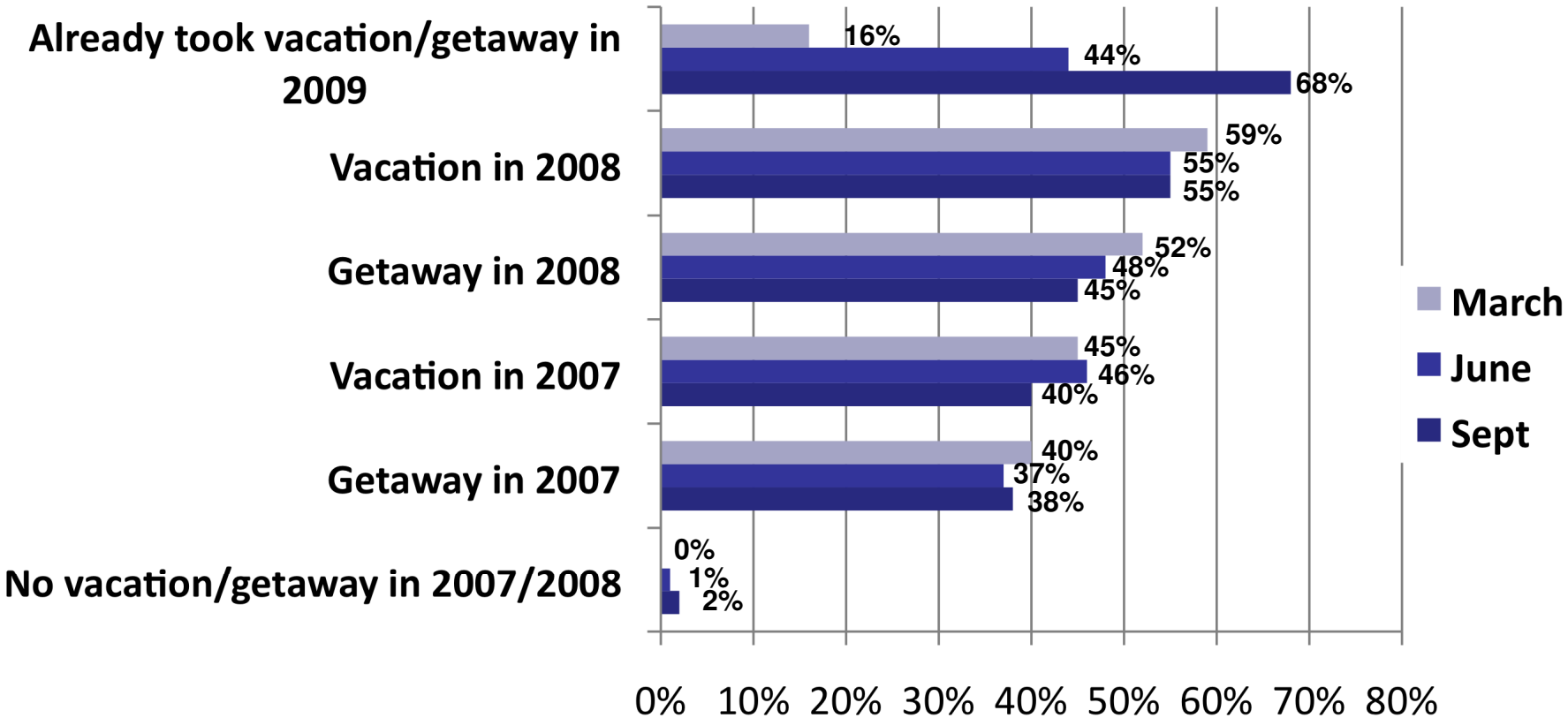
Methodology

All lived in our advertised markets.

Amarillo
Dallas/Fort Worth
Kansas City
Little Rock and Fort Smith
Joplin
Wichita
Kansas City
Wichita Falls/Lawton
Tulsa, OKC other Oklahoma

Travel Behavior

- While 44% had taken a trip by mid June, almost 70% had taken a vacation/getaway by mid-September.



Q: THINKING OF VACATIONS AND SHORTER GETAWAY WEEKENDS, I/WE ... (CHECK AS MANY AS APPLY)

Vacation Destination

- When asked where they went on their **last** vacation, Texas and Missouri remained our prime competition.

	March	June	Sept
Texas	15%	18% *	19%
Missouri	13	10	13
Florida	7	7	5
Arkansas	6	6	6
Oklahoma	6	6	7

Q: THINKING OF YOUR LAST VACATION, WHERE DID YOU GO?

* 6 to 7%= Dallas

Ever Vacationed

- When asked where they **ever** vacationed, Texas followed by Missouri and Florida remained top competitors.

	March	June	Sept
Texas	65%	64%	67%
Missouri	50	51	53
Florida	52	58	52
California	43	44	45
Oklahoma	43	43	42 ←
Colorado	43	40	45
Arkansas	41	39	42

Q: HAVE YOU EVER BEEN TO ANY OF THE FOLLOWING FOR VACATION?

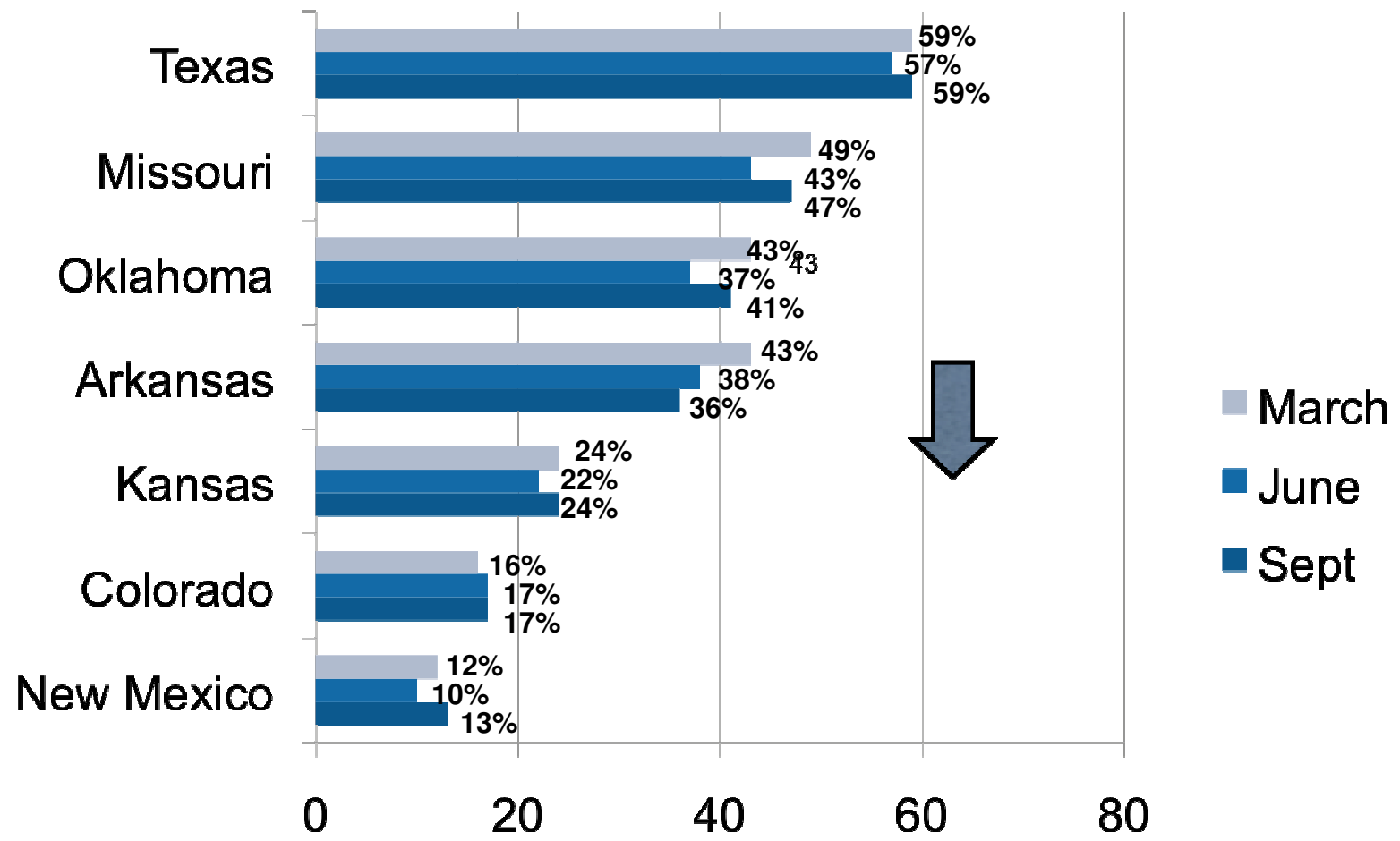
Ever Vacationed (Cont.)

	March	June	Sept
Nevada	NA	31%	32%
Mexico	27%	30	27
New Mexico	27	27	29
Arizona	26	24	15
Kansas	25	25	31
Canada	16	19	18
Hawaii	14	15	15
Europe	14	17	17
Asia	5	4	4

Q: HAVE YOU EVER BEEN TO ANY OF THE FOLLOWING FOR VACATION?

Ever Took a Getaway in ...

- Arkansas shows a downward trend as a getaway spot.



Q: HAVE YOU EVER SPENT A GETAWAY WEEKEND TRIP IN ... (CHECK AS MANY AS APPLY) * NA March

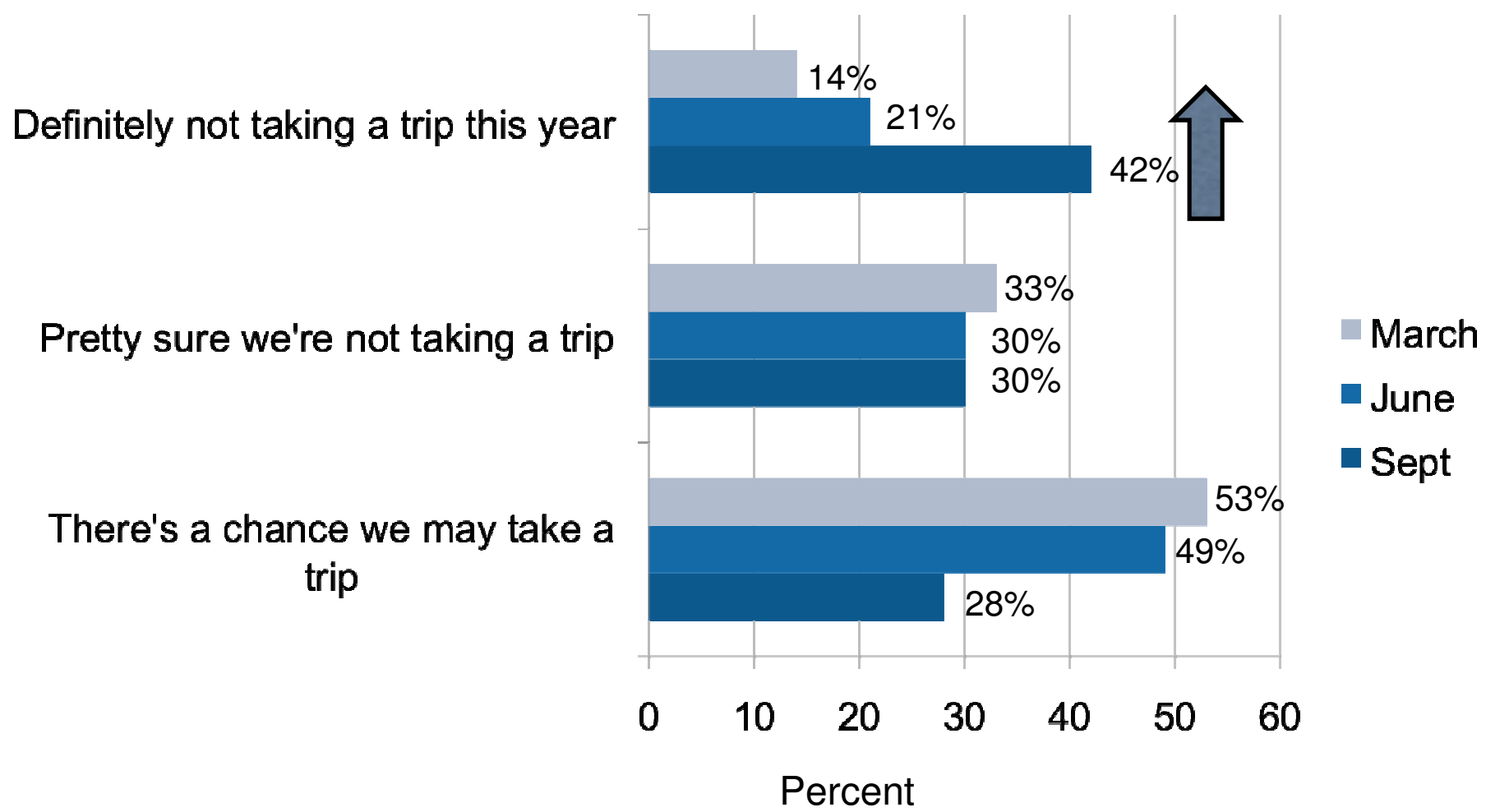
Vacation Behavior

- Vacation season is slowing ... But not over . . .

	March	June	September	+/-
Still plan to take a vacation in 2009	52%	47%	20%	-27%
Plan get away in 2009	51	51	34	-17
Already took a trip 2009	12	30	54	+24
Haven't decided yet	21	16	13	-3
Don't plan to take a trip in 2009	7	6	12	+6

Certainty of Those Who Said, "No/Haven't Decided"

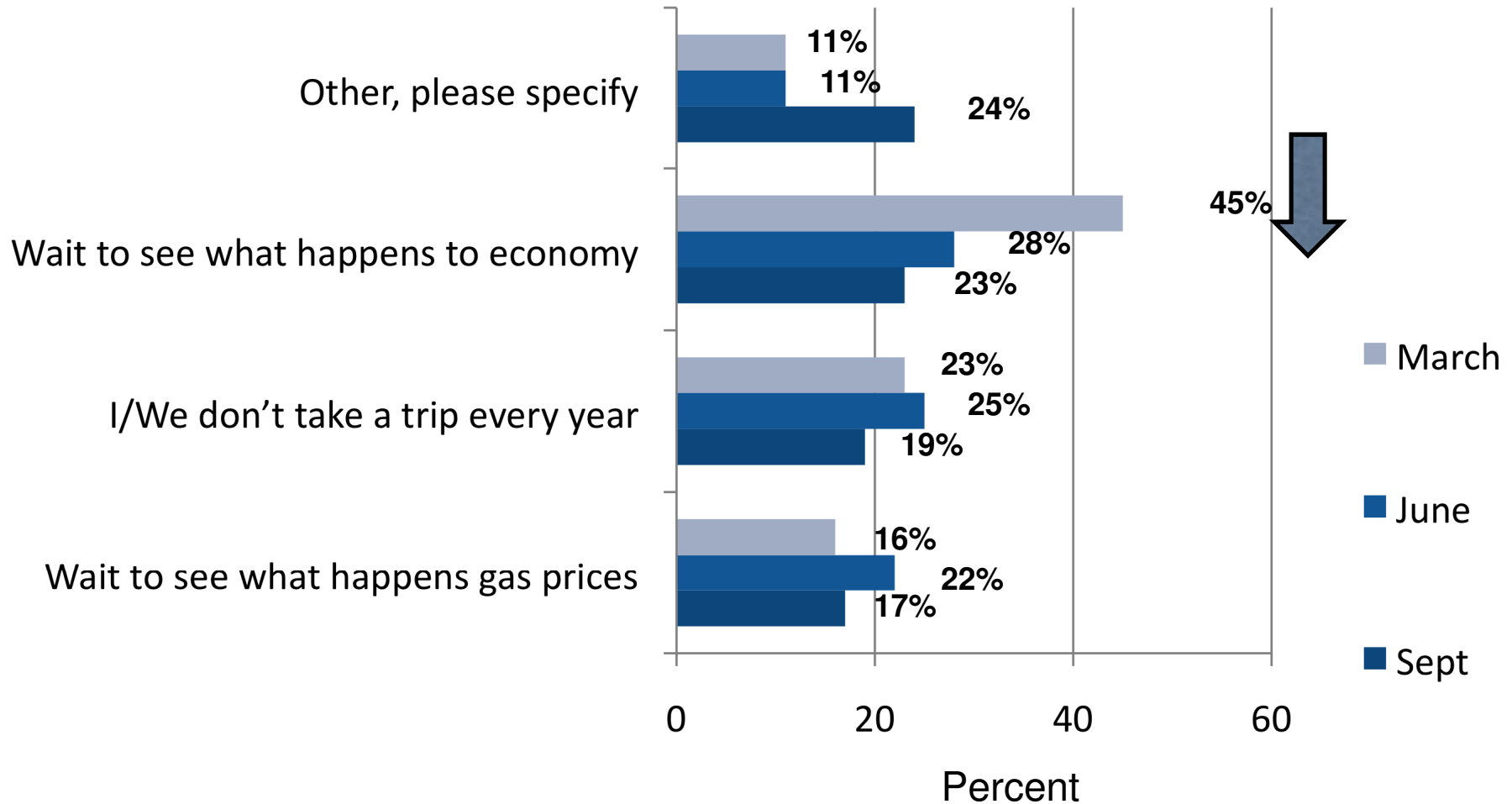
"Definitely Not Taking a Trip" → Doubled (+21%)



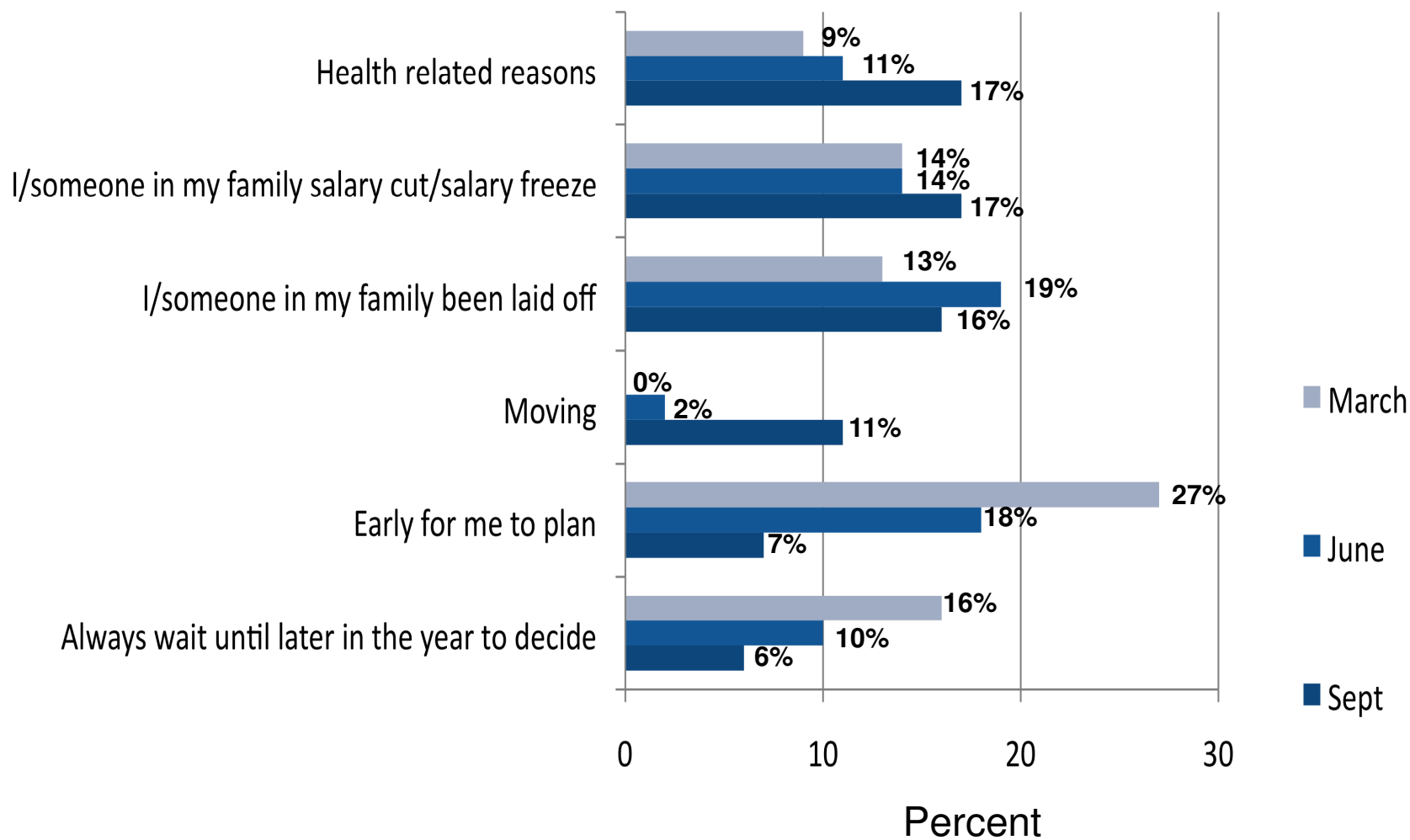
Q: AND JUST TO GET A BETTER IDEA OF HOW SURE YOU ARE ABOUT YOUR TRAVEL PLANS, WOULD YOU SAY YOU ARE ...

Why Not Take a Trip?

•“Other” = \$\$\$\$\$\$

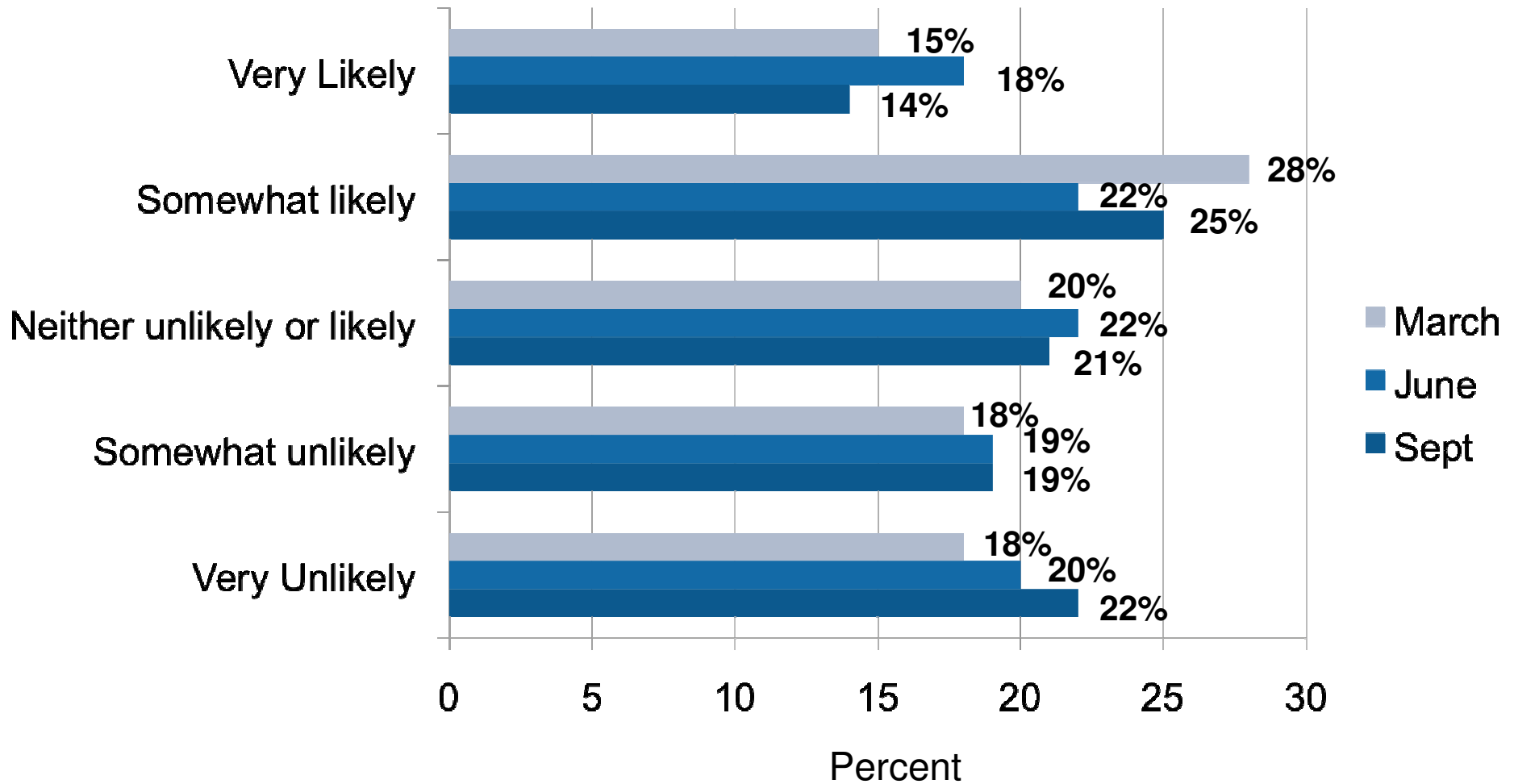


Why Not Take a Trip?



2009 Intent to Vacation in Oklahoma

- *Intent to vacation in Oklahoma remains at roughly 40%--in-state remains higher*



Q: HOW LIKELY WOULD YOU BE TO TAKE A VACATION OR GETAWAY WEEKEND IN OKLAHOMA?
ON A 1 TO 5 SCALE WITH A 5 BEING VERY LIKELY ...

Where people plan/have taken vacation in 2009

- Texas and Missouri both showed declines from June, while Oklahoma showed a small upward trend.

	March	June	Sept
Texas	32%	43%	35%
Oklahoma	14	16	18
Kansas	7	6	9
Arkansas	14	13	14
Missouri	24	24	19
Colorado	6	7	8
Arizona	3	1	2
California	4	4	5
New Mexico	2	3	2

Q: THIS QUESTION IS JUST FOR THOSE WHO HAVE ALREADY TAKEN OR WHO PLAN TO TAKE A VACATION OR GETAWAY TRIP THIS YEAR. WHERE DO YOU PLAN TO GO OR WHERE DID YOU ALREADY GO ON VACTATION OR FOR YOUR GETAWAY? (CHECK AS MANY AS APPLY)

Where people plan/have taken vacation in 2009 (Cont.)

- Florida, another destination state, also showed a decline.

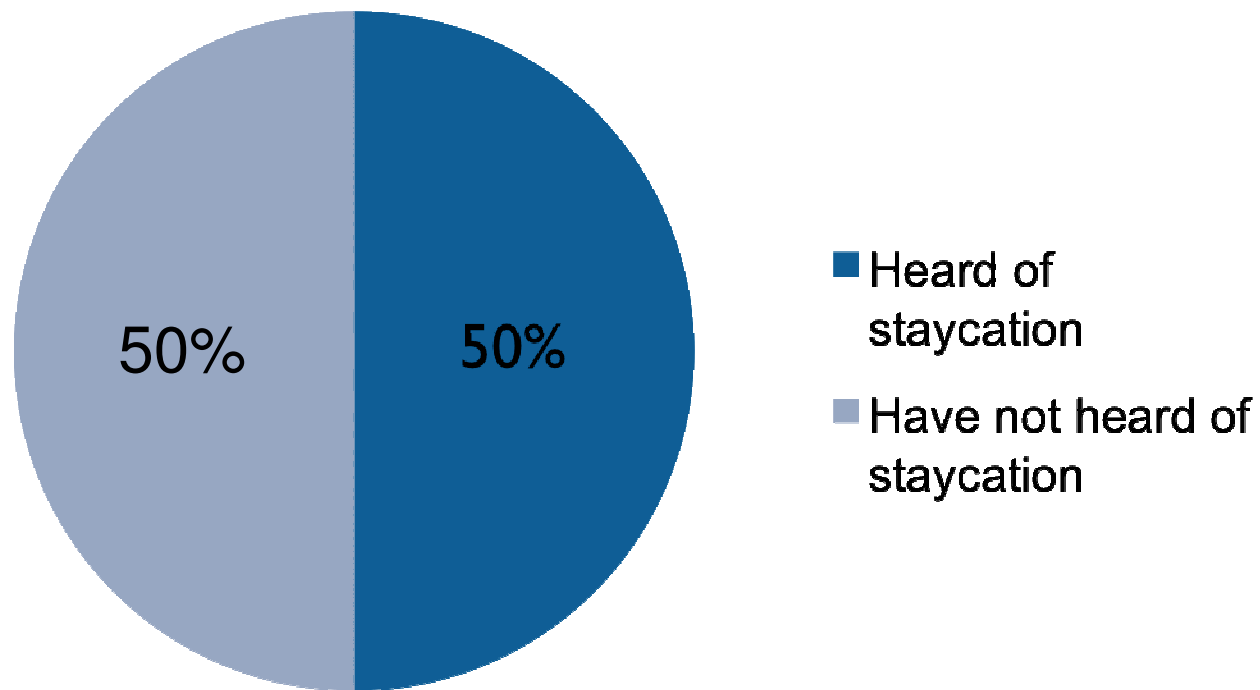
	March	June	Sept
Florida	14	11	9
New York	6	4	2
Hawaii	2	1	1
Canada	1	2	1
Mexico	6	4	3
Europe	3	2	2
Asia	1	1	1
Don't Know Yet	12	8	9
Other	32	28	26

Q: THIS QUESTION IS JUST FOR THOSE WHO HAVE ALREADY TAKEN OR WHO PLAN TO TAKE A VACATION OR GETAWAY TRIP THIS YEAR. WHERE DO YOU PLAN TO GO OR WHERE DID YOU ALREADY GO ON VACTATION OR FOR YOUR GETAWAY? (CHECK AS MANY AS APPLY)

Staycation

- Half had heard the term “staycation.”

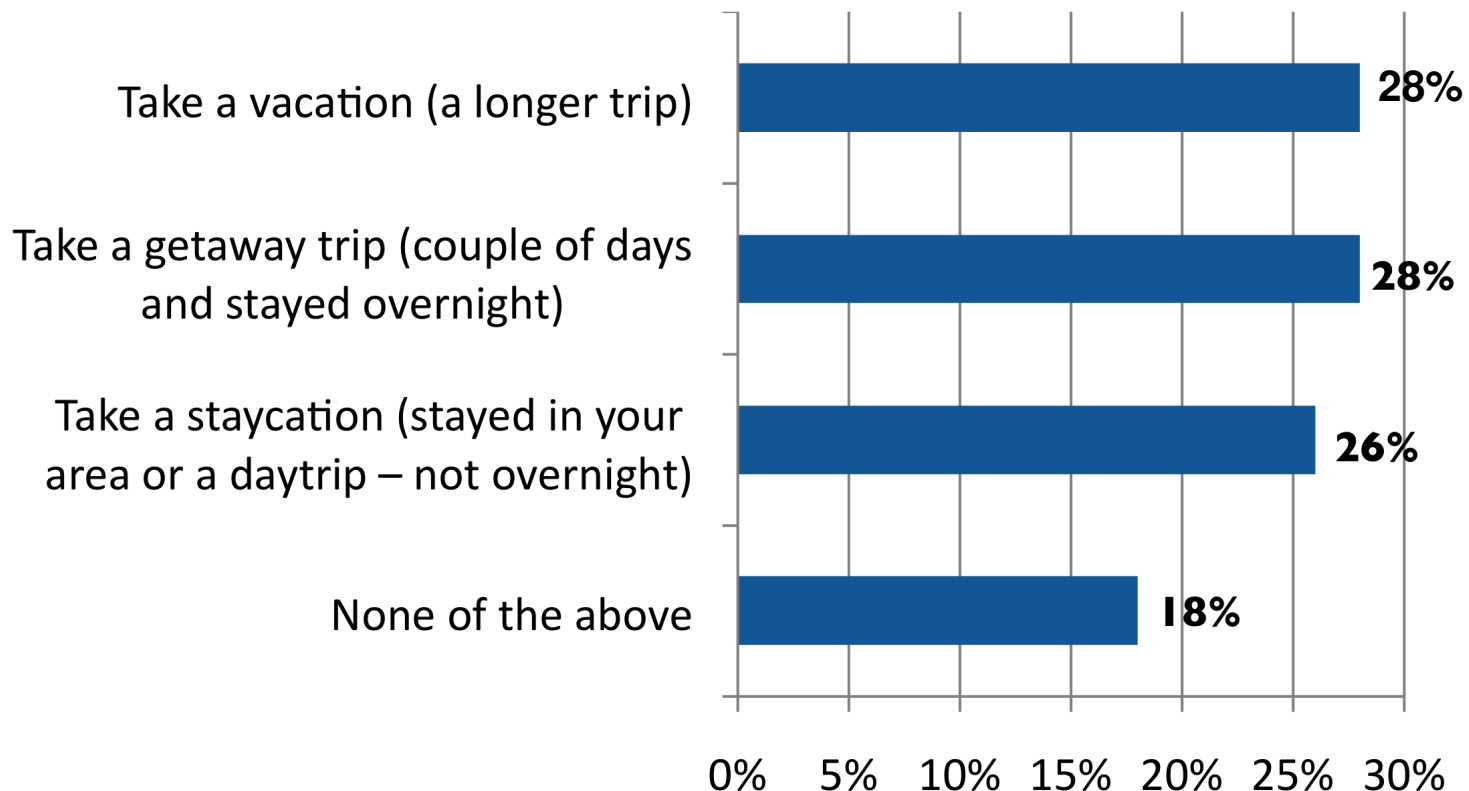
Awareness



Q: Are you familiar with the word staycation?

Vacation Behavior Including Staycation

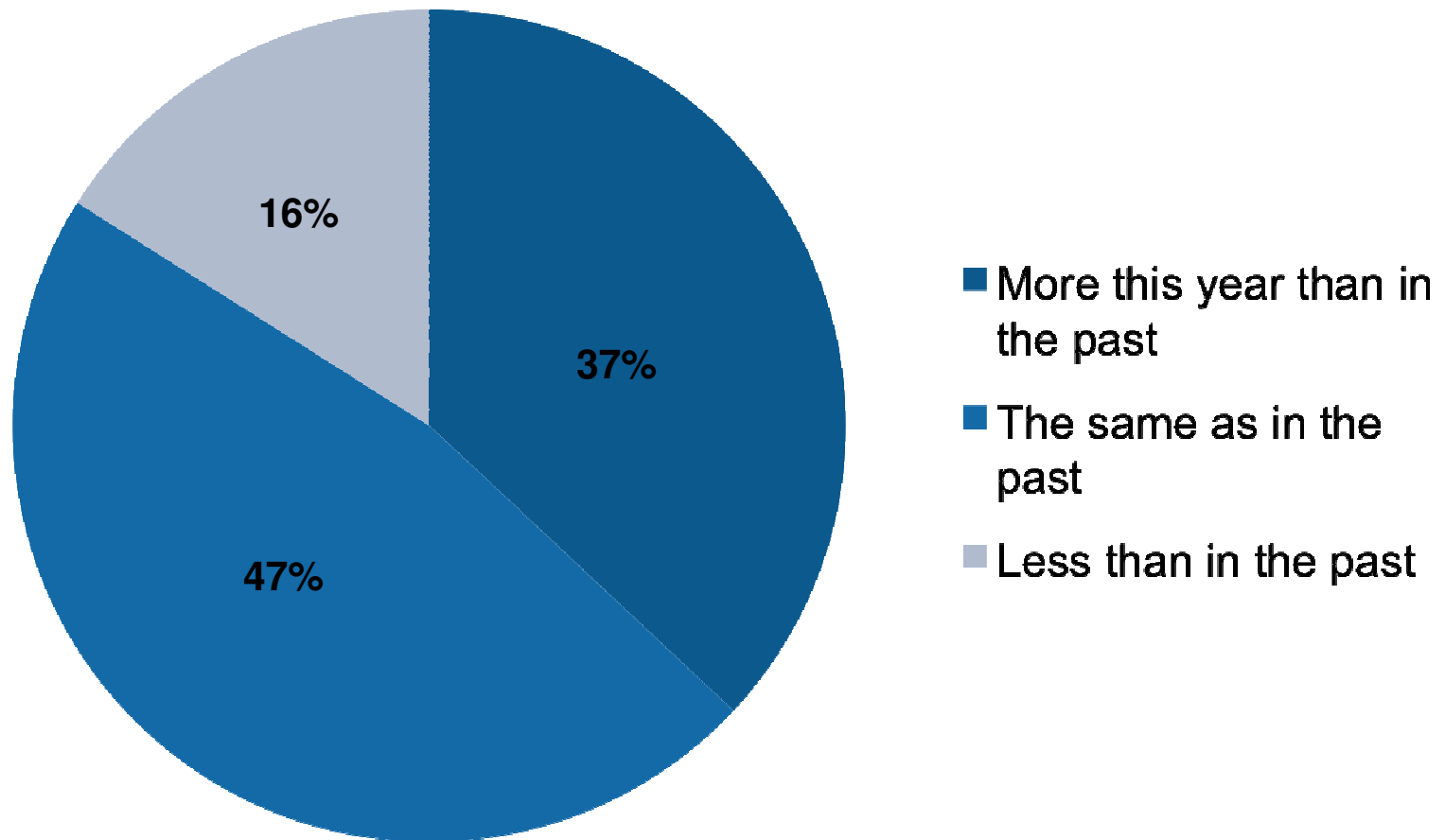
- Those who had taken a trip were asked what they did.
- Roughly equal numbers took vacations, getaways and staycations.



Q: A staycation is a term used when a family or individual either stays in his or her immediate area or takes a daytrip to a nearby attraction rather than taking a several day trip (a getaway) or a longer vacation. This year did you... (Note not multiple response)

Staycation Comparison

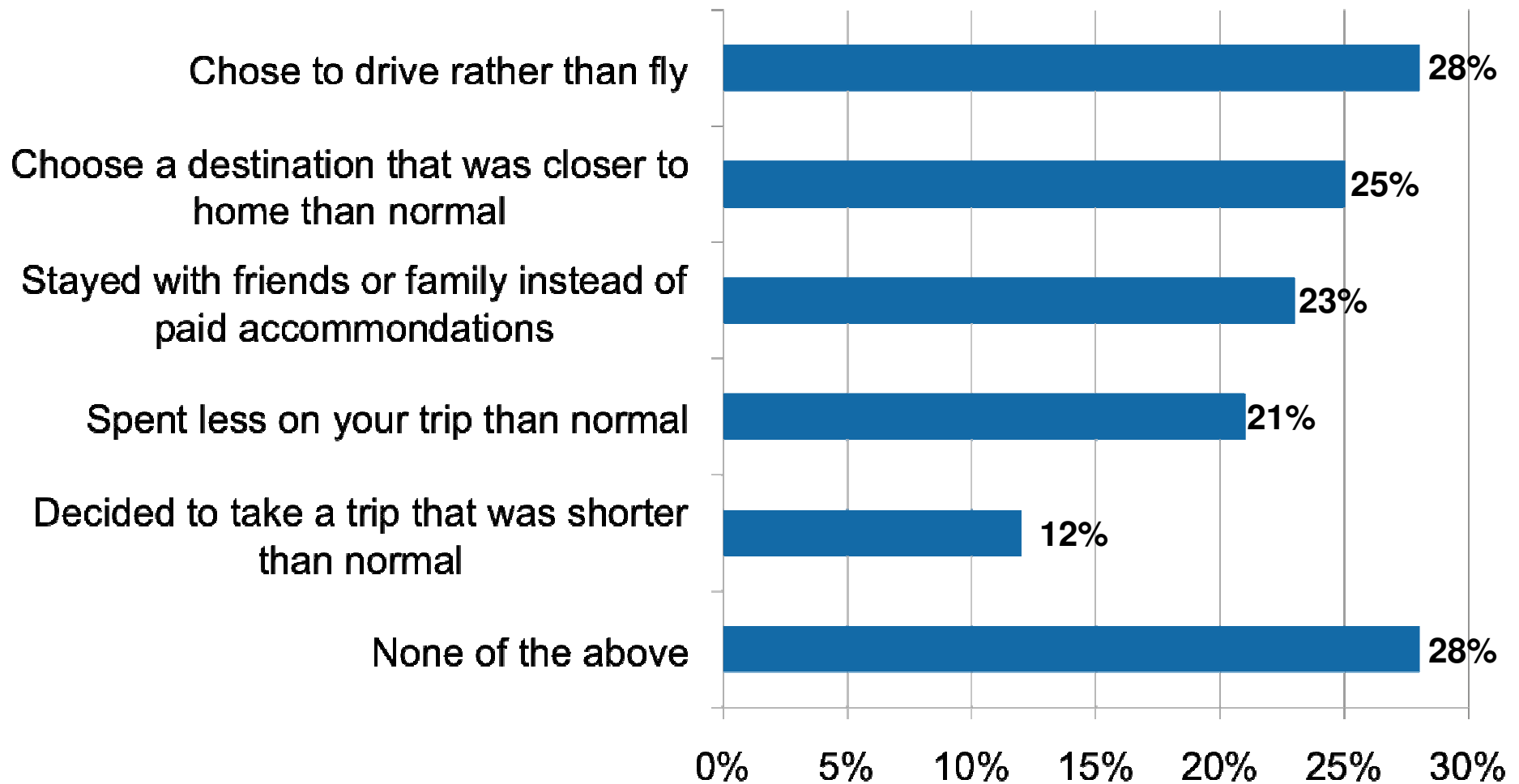
- Was that a behavioral change? Yes.



Q: If you took a staycation in 2009, was that something you did ...

Other Behavioral Changes

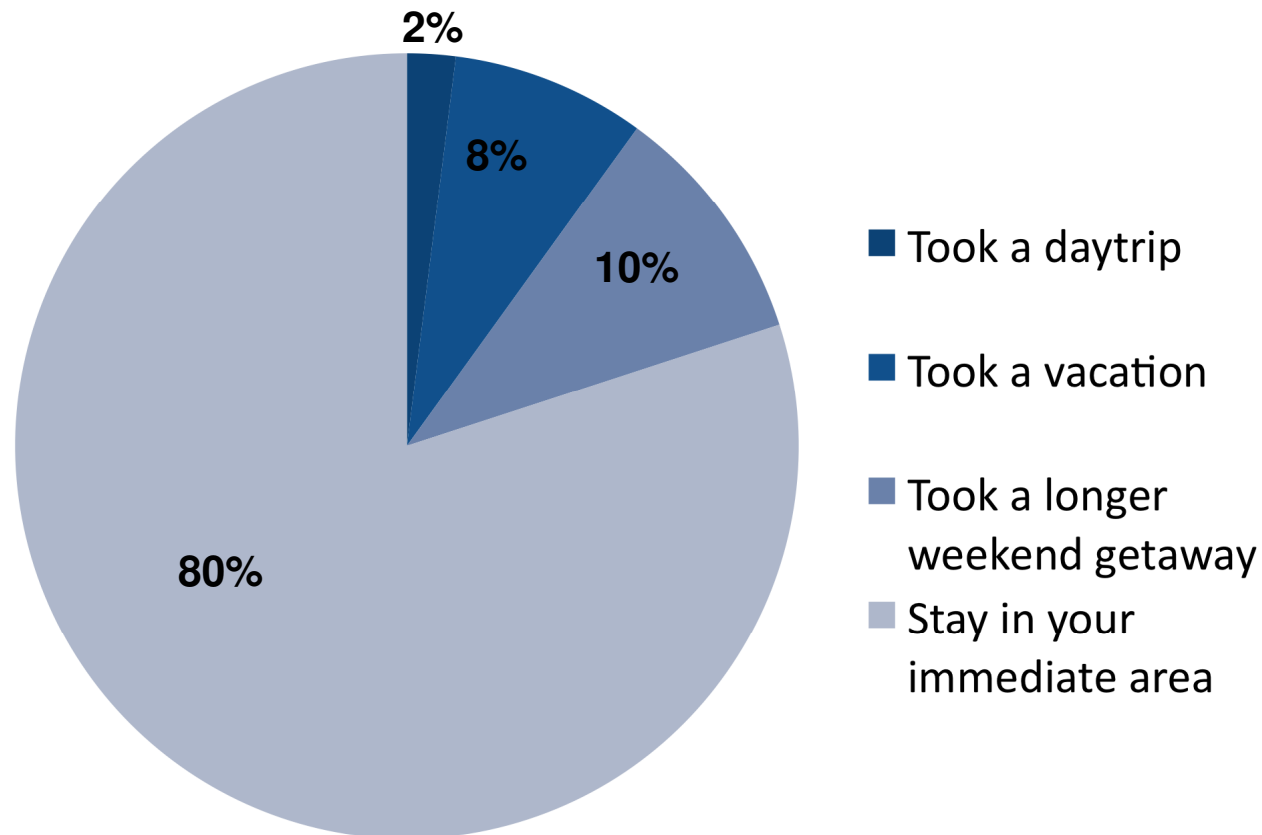
- In general, roughly 20% to 25% scrimped this year.



Q: Thinking of the leisure trip you took this past year – whether it was a vacation, get-away or staycation, did you ...

Labor Day

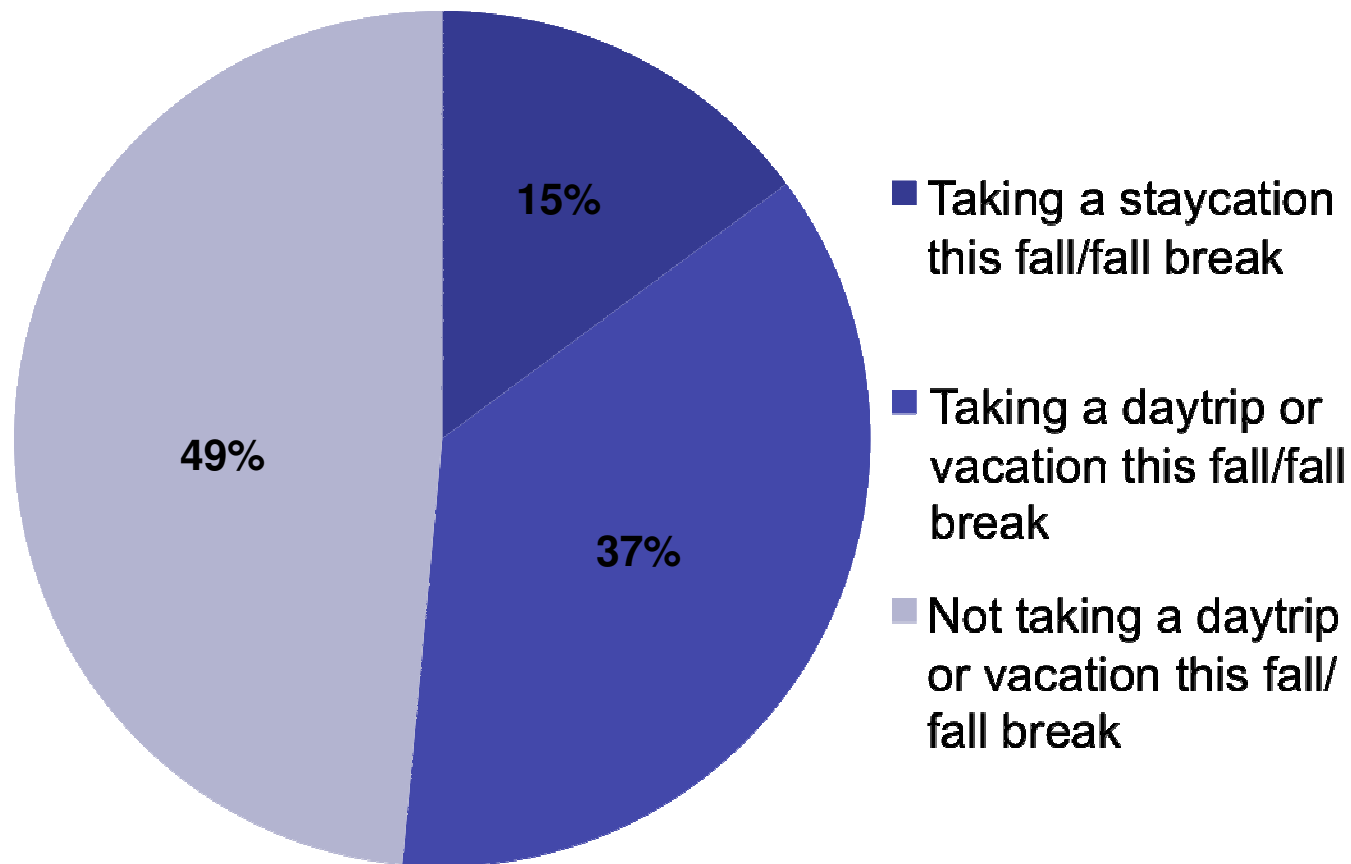
- 20% went somewhere over Labor Day.



Q: Thinking of Labor Day weekend, did you...

Fall Trip

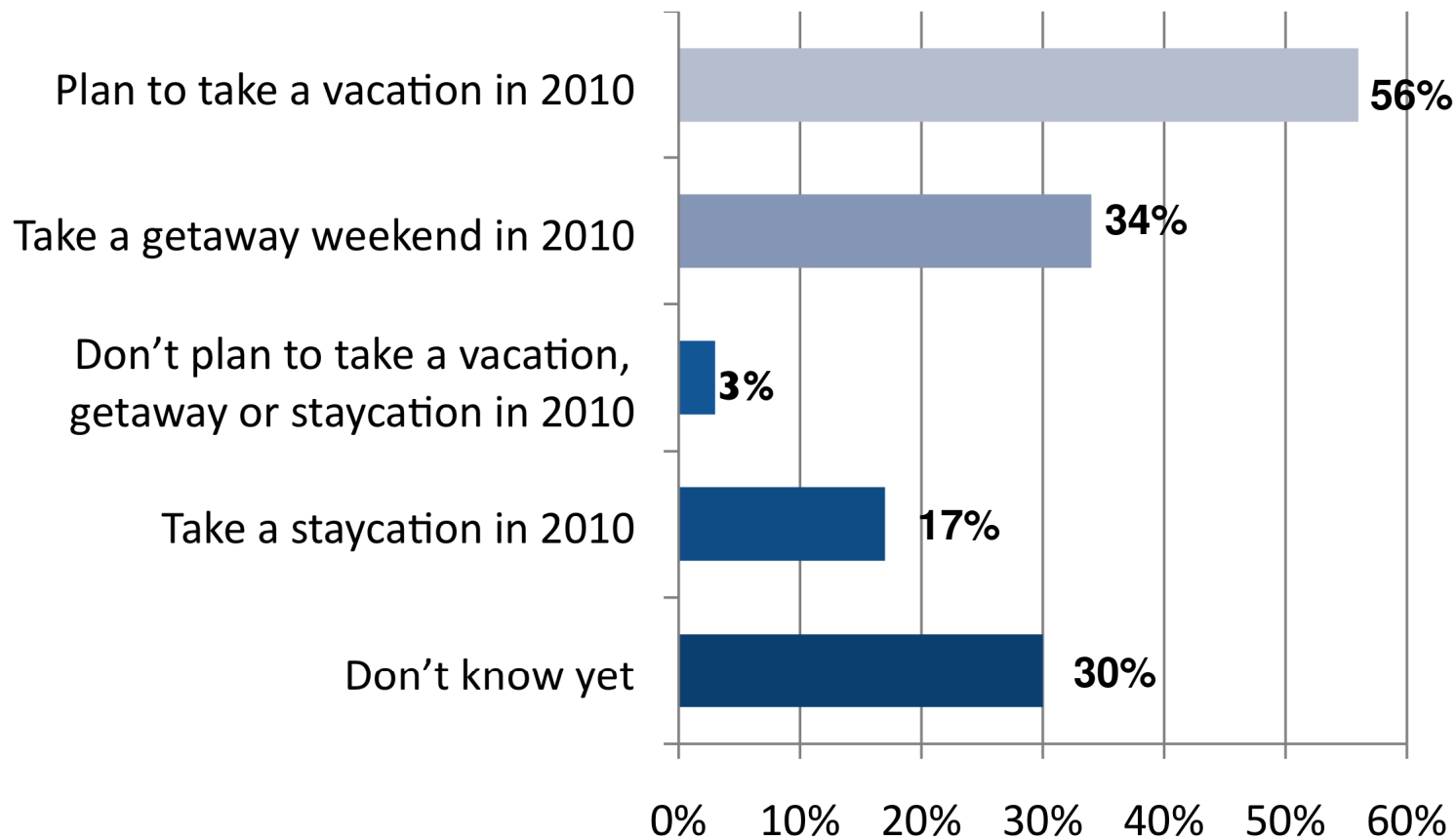
- But the good news is travel season isn't totally over.
- When asked, more than half specifically planned a day trip/vacation (37%) or staycation (15%) this fall.



Q: And are you planning on ...

Plans for 2010

- Other good news is, there is pent up demand for travel in 2010.
- 90% plan to vacation (56%) or take a day trip (34%) next year.



Q: And thinking of 2010, do you...

Conclusions

- By September, most of vacation/getaway travel has occurred. Those firmly not taking a trip has doubled from 6% to 12%
 - **Implication:** The time for large-scale persuasion is past.
- Consumers have moved to acceptance of the economy ... but those who don't plan to take a trip, just don't feel they have the money.
 - **Implication:** It all boils down to discretionary dollars.
- States that are perceived as destination states like Texas (San Antonio, Austin, etc), Missouri (KC and Branson) and Florida have all shown declines in this past Tracker.
 - **Implication:** Oklahoma may be better off than some surrounding states.
- Over one-quarter took a staycation this year. Of those who took a staycation, one-third agreed this was something they did more this year than in the past.
 - **Implication:** With limited funds, travelers are staying closer to home.

More Conclusions

- Due to the economy, scrimping was the order of the day for 20 to 25% of travelers.
 - **Implication:** It's not that most decided to forgo a trip – they just downsized their vacation dreams ... leading almost certainly to lower dollars for the industry.
- The travel season isn't over. Half still planned to take some sort of daytrip, vacation or staycation this fall.
 - **Implication:** It's not over 'til it's over.
- There is pent-up demand for the 2010 season with 90% planning a real vacation or daytrip, and just 17% planning a staycation.
 - **Implication:** Consumers consider vacations a right. If the economy rebounds next year – even slightly – consumers would like to travel again.