

2009 Consumer Travel Pulse

Methodology

- 516 interviews among vacationers/travel deciders (half male/half female-- 40% sole and 60% joint vacation decision-makers)
- Conducted March 7-10, 2009
- Online survey
- All had to have taken a vacation or get-away weekend in 2007 or 2008 (or to have taken or to plan one in 2009)
- 25-64 years old (80% 25-54)

Methodology

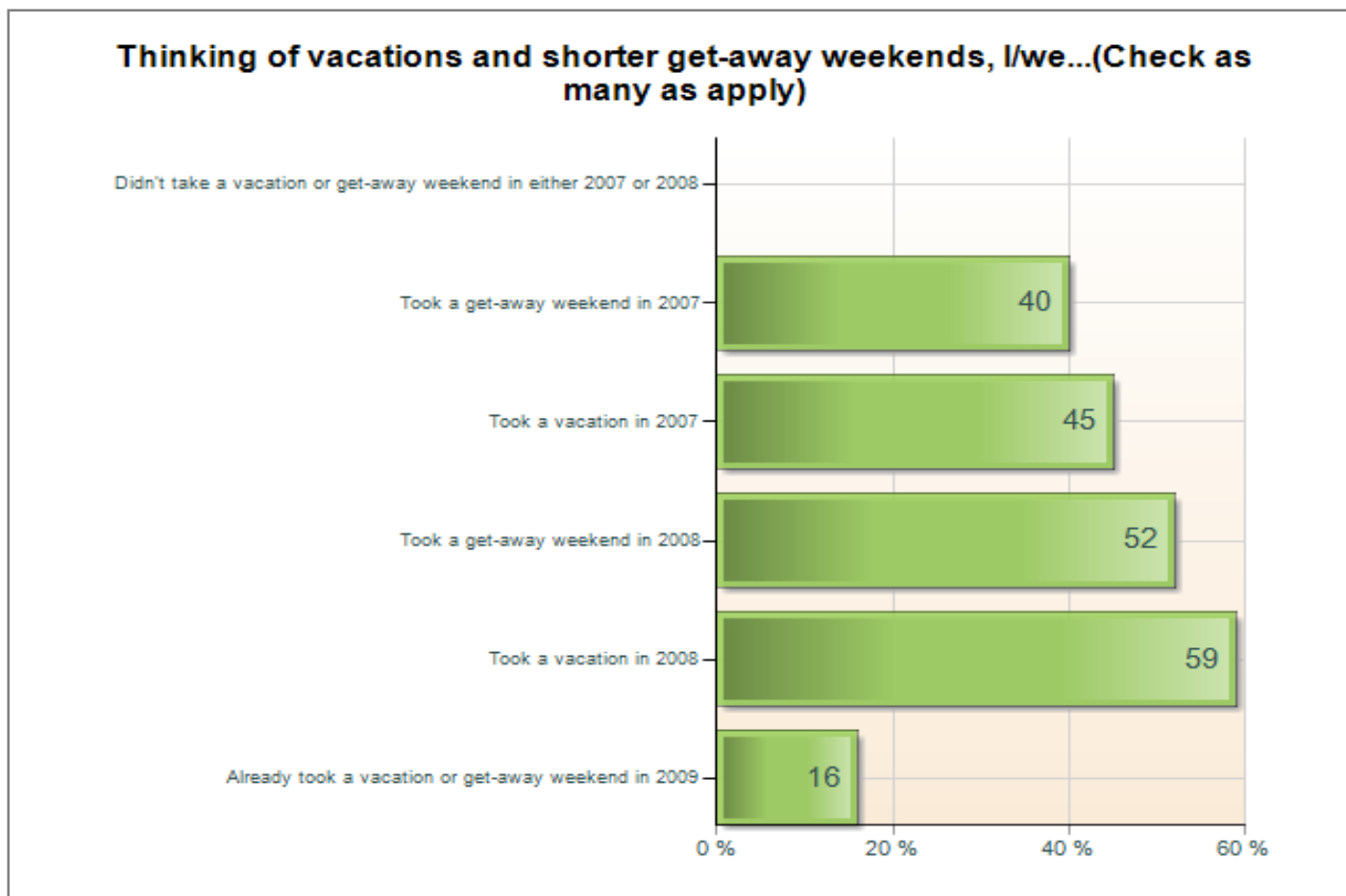
- Lived in our advertised markets:
 - Dallas/Fort Worth
 - Kansas City
 - Little Rock and Fort Smith
 - Joplin
 - Wichita
 - Kansas City
 - Wichita Falls/Lawton
 - Tulsa, OKC other Oklahoma

Objective

- To take a quarterly pulse to better understand consumers' travel plans in 2009.
- In addition to this March survey, we plan to repeat this survey in early June and in early September.

Past Vacation Behavior

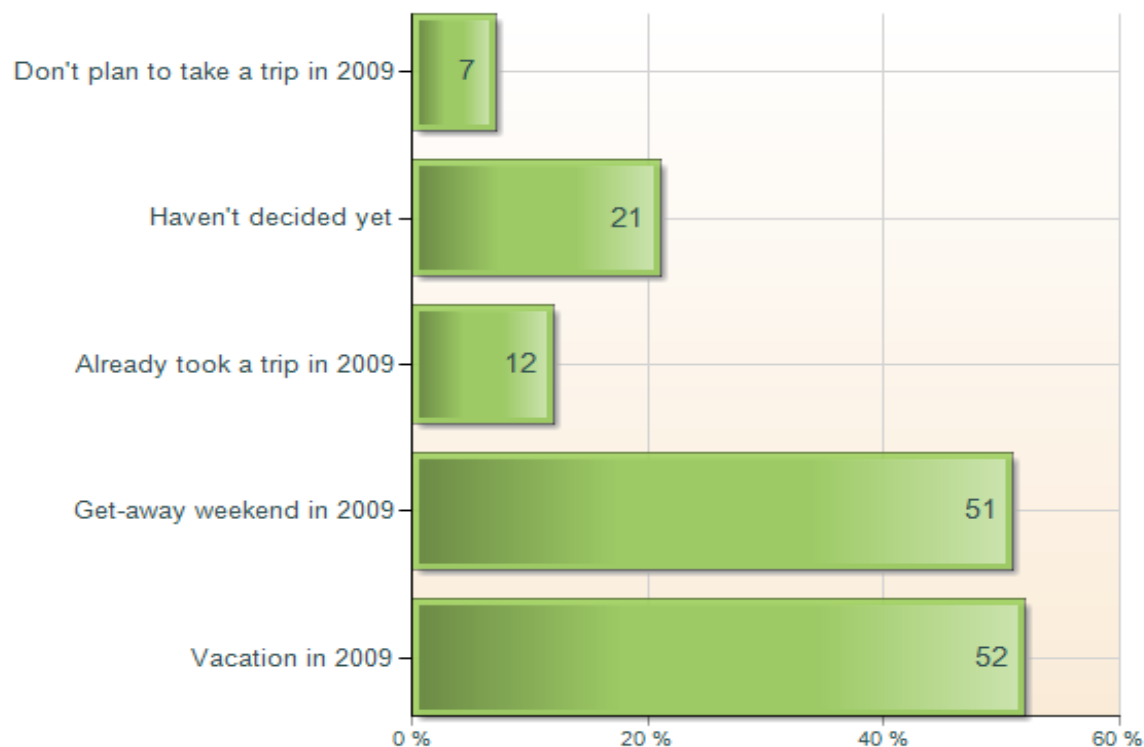
- About half took a get-away and 60% took a vacation last year-- higher than the year before.



Plans for 2009

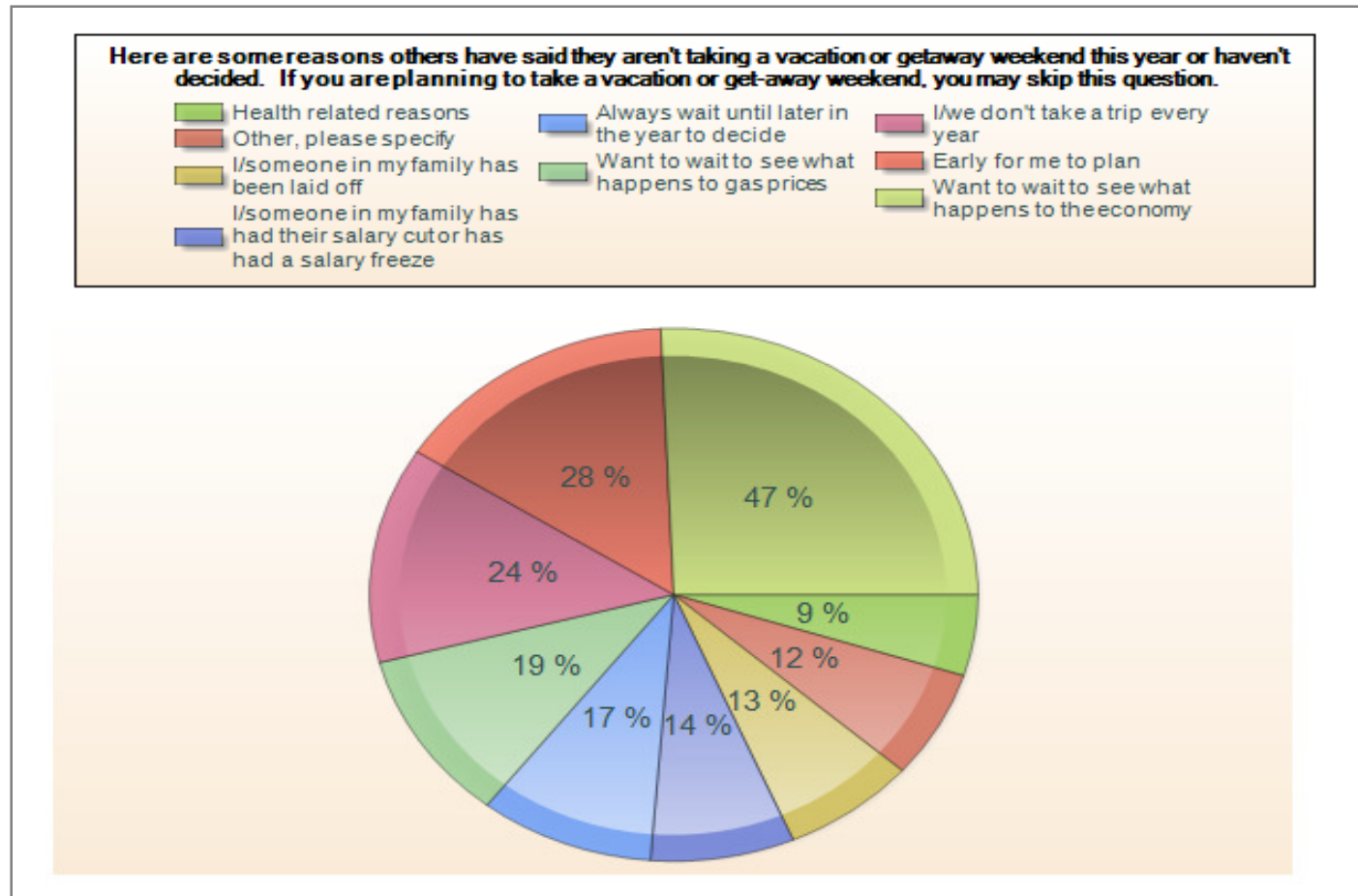
Half are planning a trip; about 30% haven't decided or aren't taking a trip this year.

Thinking of 2009, do you plan to take a...(Check as many as apply)



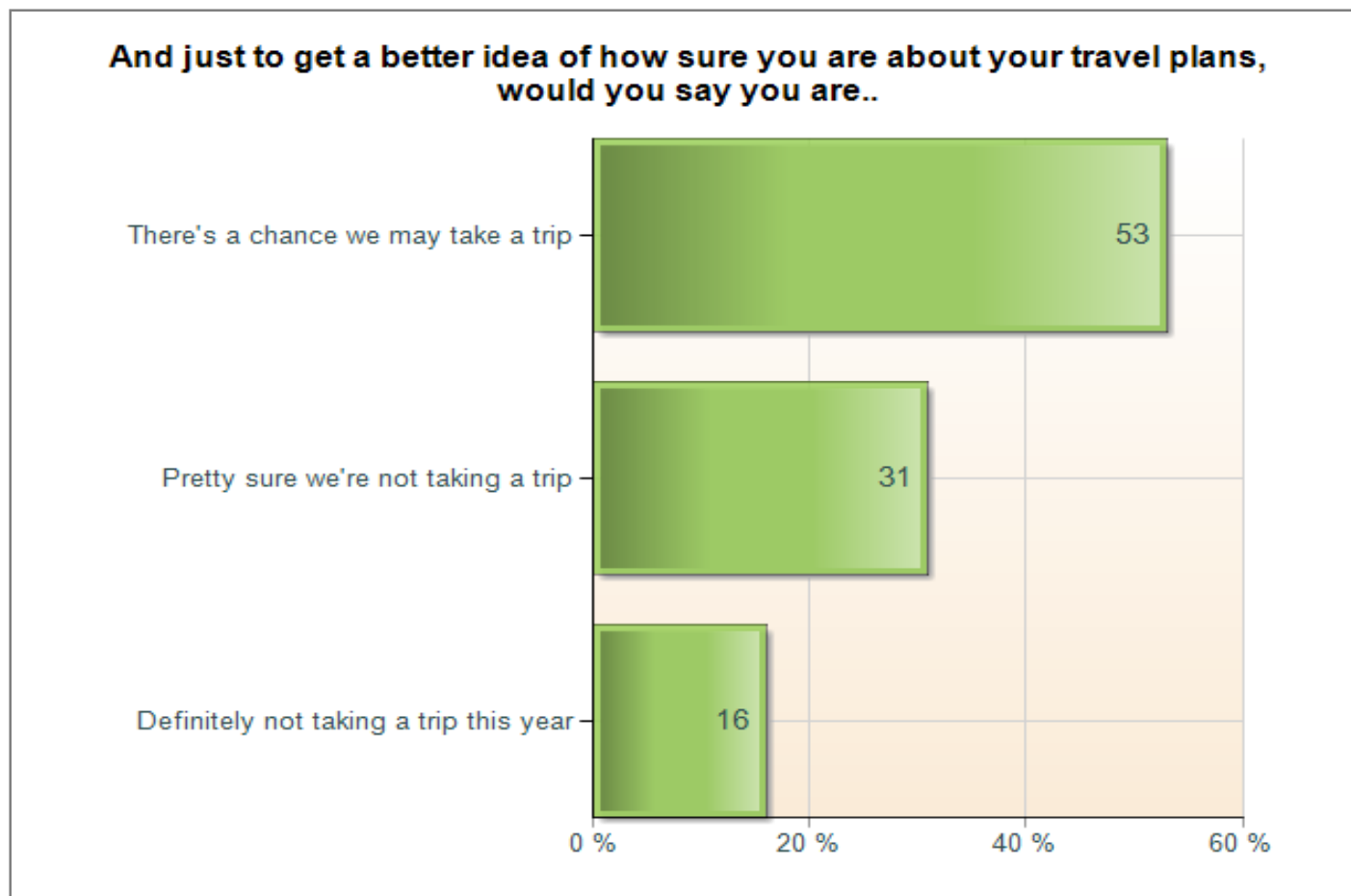
Why Not Take a Trip This Year?

- The economy is the biggest reason (47%) with people citing lay-offs and salary freezes (14%).
- About one-quarter say it's early to plan or they don't take a big trip each year.



Likelihood To Change...

- Those who said “no or haven’t decided yet” were asked their certainty.....About half are still up for grabs.



2009 Vacation or Get-Away

Those who are planning or had taken a trip in 2009 were asked where they went or where they plan to go.

- Texas 24%
- Missouri 23%
- Florida 17%
- Arkansas 15%
- Don't know yet 12%
- **Oklahoma 11%**
- Colorado 7%
- New York 7%
- Mexico 7%
- California 5%
- New Mexico 3%
- Arizona 3%

Travel Plans

Other destinations with 3% or fewer responses included:

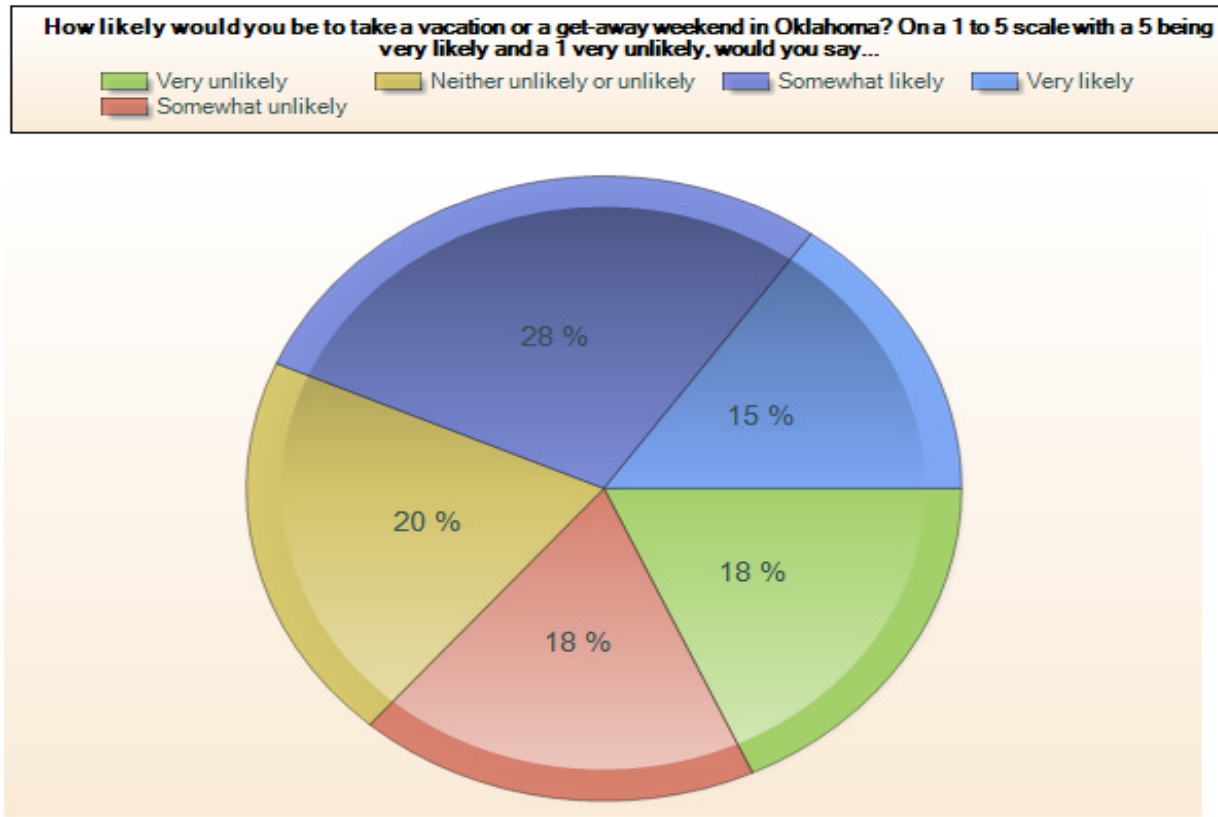
- Europe, Asia, Caribbean, Las Vegas, Chicago, Washington, D.C., Central America, Pennsylvania, Kentucky, a gamut of destinations.

Had Vacationed

- When asked where they had ever vacationed or taken a get-away weekend...
 - 67% Texas
 - 63% Florida
 - 52% California
 - 48% Missouri
 - 47% Colorado
 - **42% Oklahoma**
 - 41% Arkansas
 - 32% Arizona, Mexico, New Mexico
 - 28% New York
 - 25% Kansas
 - 19% Canada
 - 17% Hawaii or Europe

2009 Intent to Vacation in Oklahoma

- About 40% would consider a vacation here -- similar to the percent who have already vacationed here.



Conclusions

- Twenty percent of consumers in our target markets are on the fence about taking a trip.
- This indecision is economy related.
- There is chance that they could be persuaded.
- This will serve as our first benchmark.
- The June and September waves will give us an even clearer understanding of 2009 travel patterns for Oklahoma and surrounding states.