

2018 YEAR END MARKETING REPORT

Branson Convention & Visitors Bureau
March 12th, 2019

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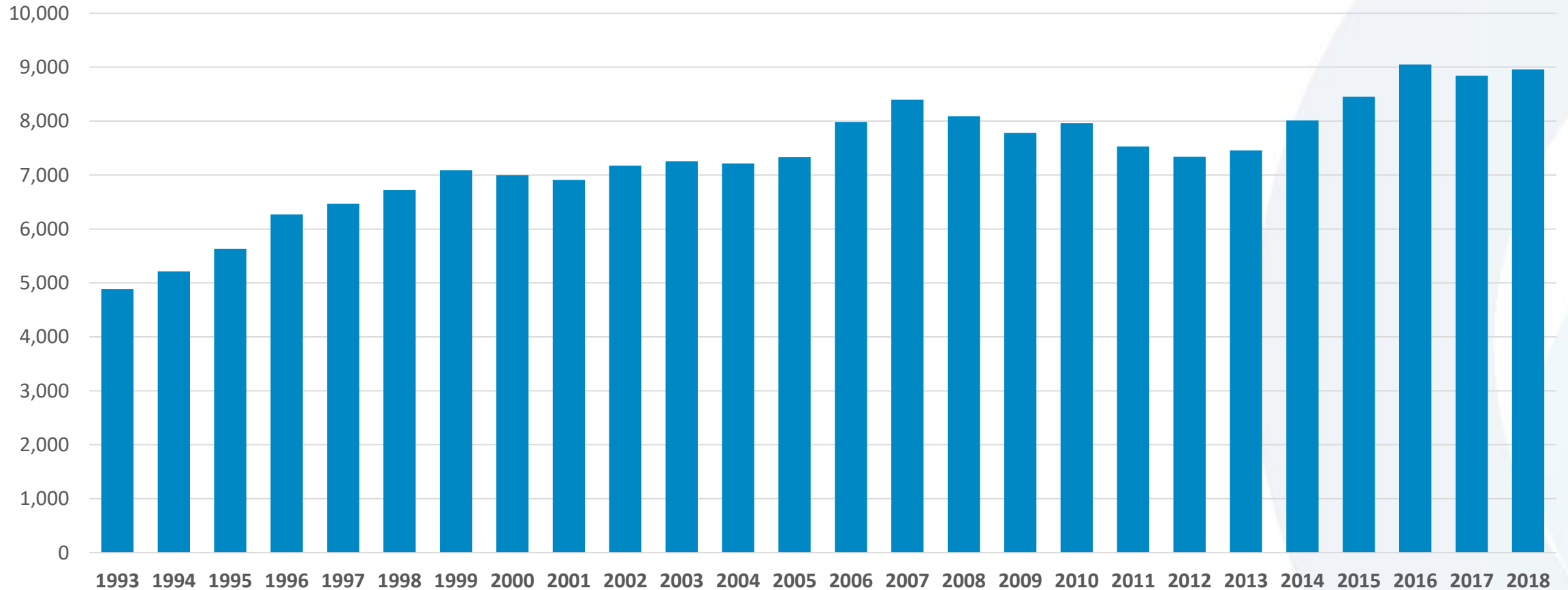
- + U.S. Leisure Travel Forecast
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Key Performance Indicators

01

Visitation this year remains strong at roughly 8.9 million*, which was Branson's 2nd biggest recorded visitation year in history.

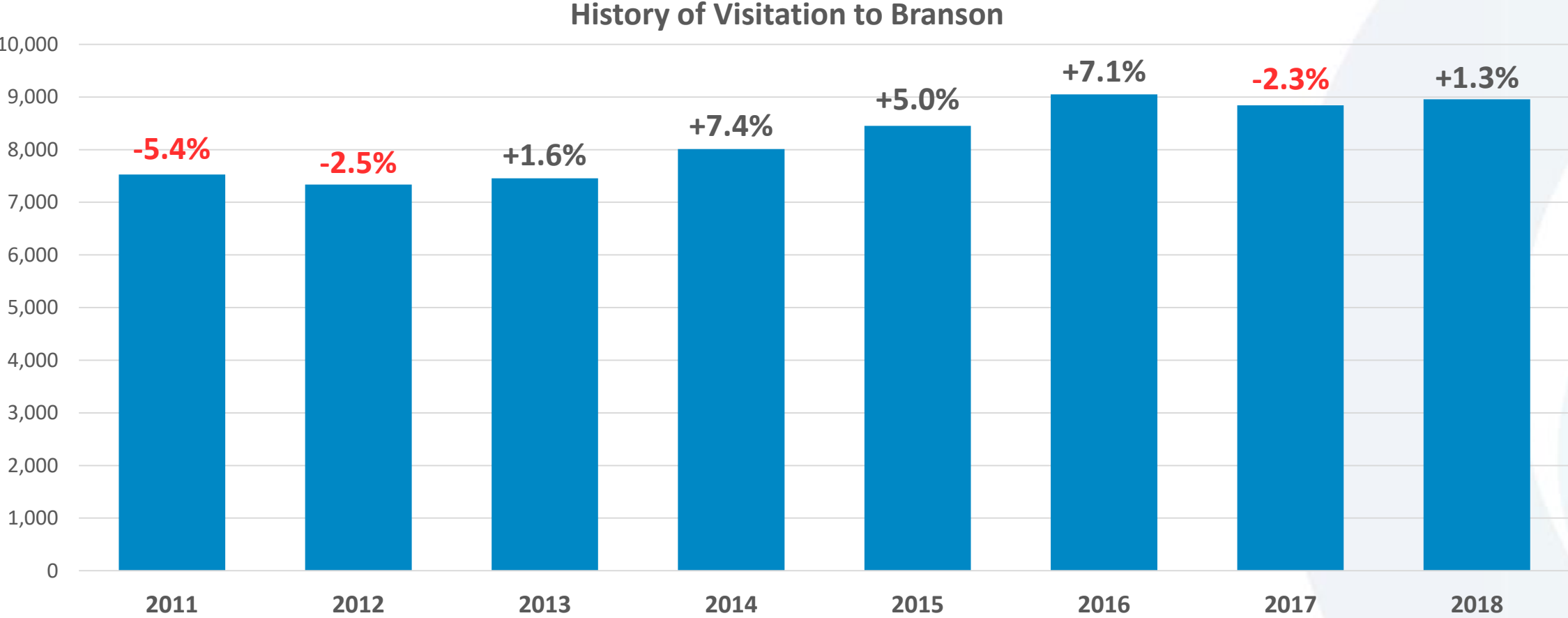
History of Visitation to Branson (000s)



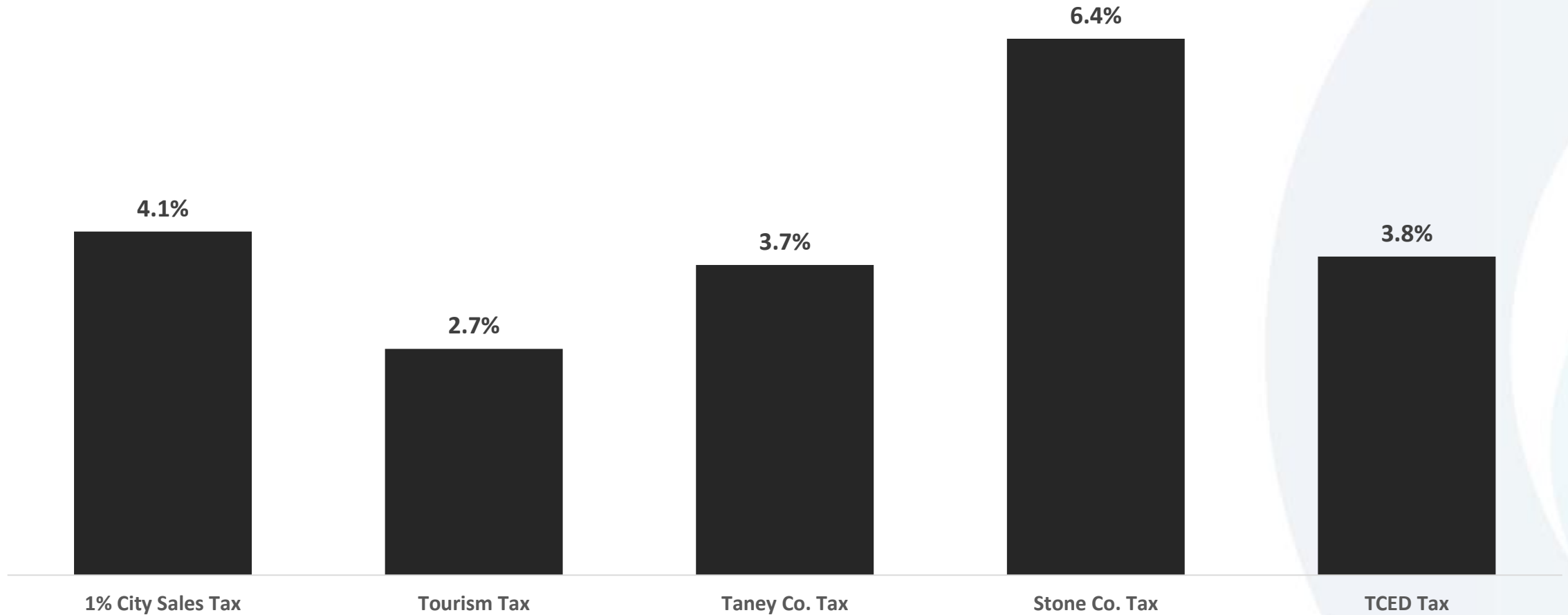
*Branson no longer uses "visitation" as an official estimate of performance.

Base=7.0M (2000, DKSA)

Branson's visitation has increased 5 times in the past 6 years.

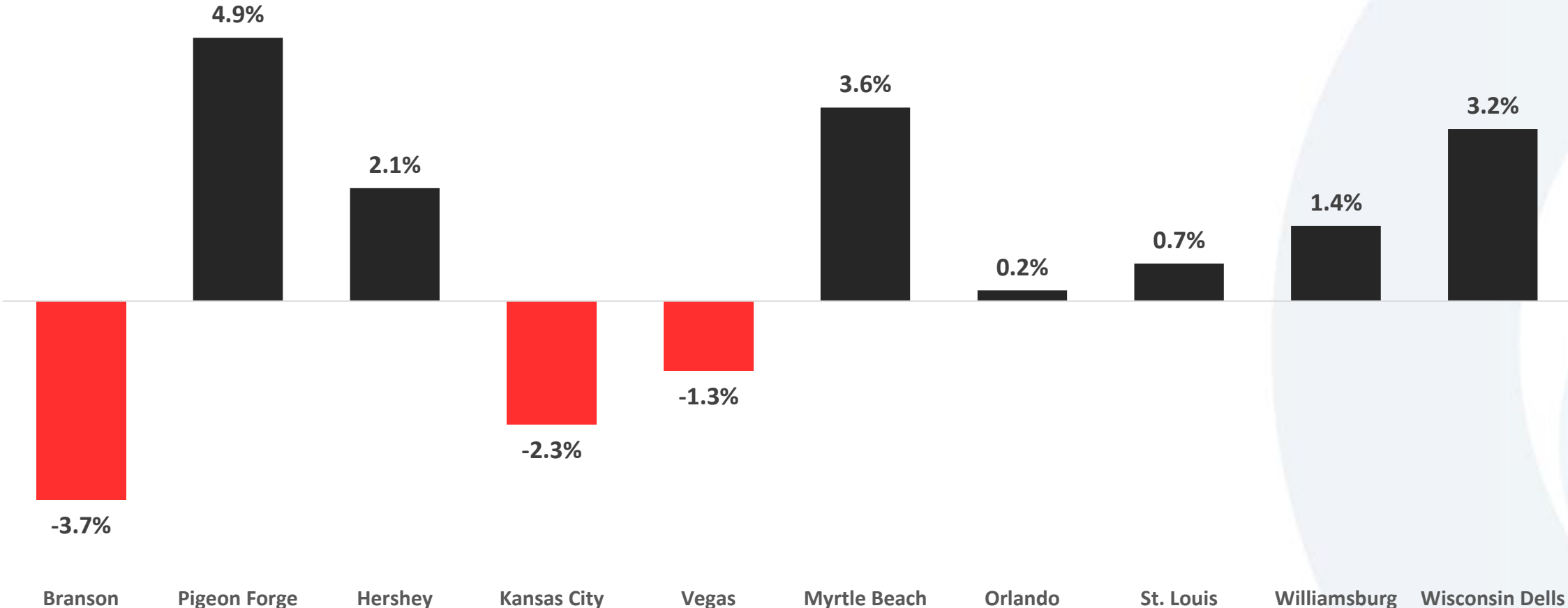


Branson area sales tax revenues were up across all sources in 2018.



2018 YTD Through December

According to STR*, however, room demand fell by 3.7%.



2018 YTD Through December

Behavioral Profile

02

BEHAVIORAL PROFILE KPI*



Repeat Visitation

46%

(+4.8 points)



Decision Time

68 days

(+6 days)



Net Promoter Score

61%

(+3 points)



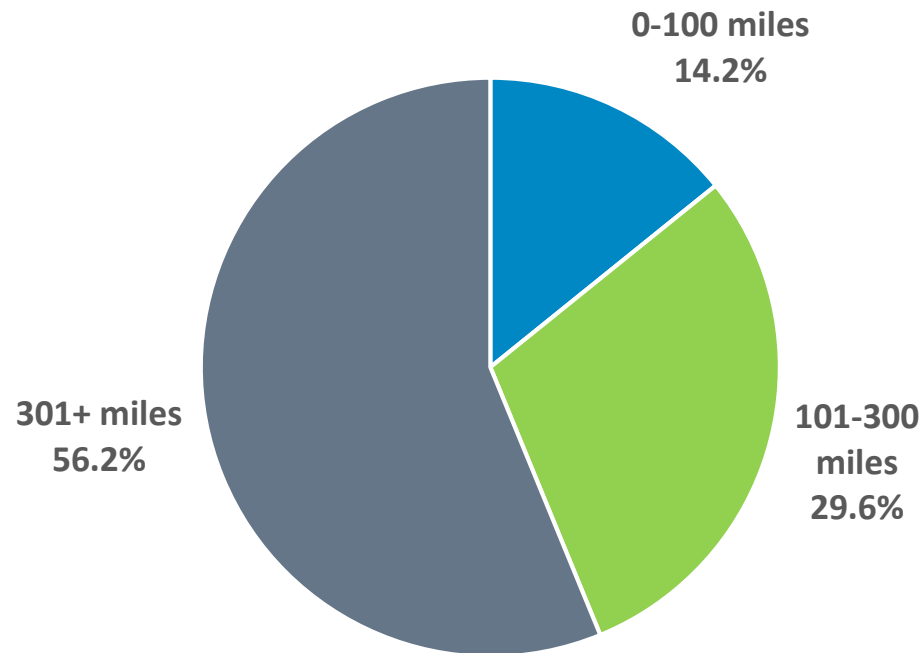
Intent to Return

89%

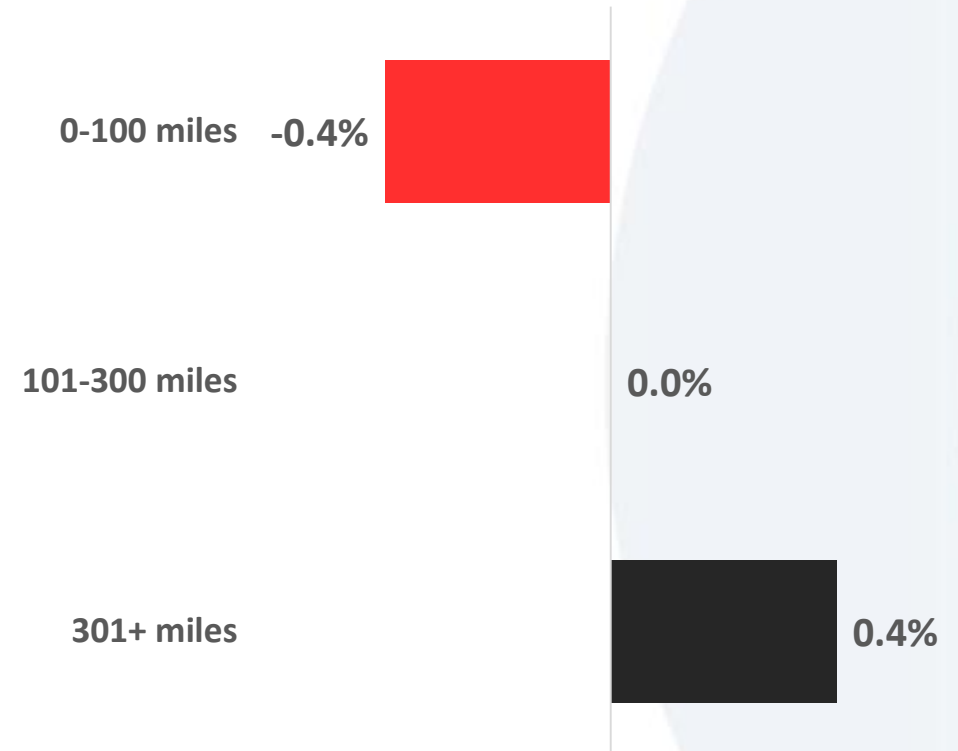
(+2 points)

Outer Markets (301+ miles) represented the majority of Branson visitation, and experienced the largest year-over-year increase of any tier.

Distance Traveled to Branson

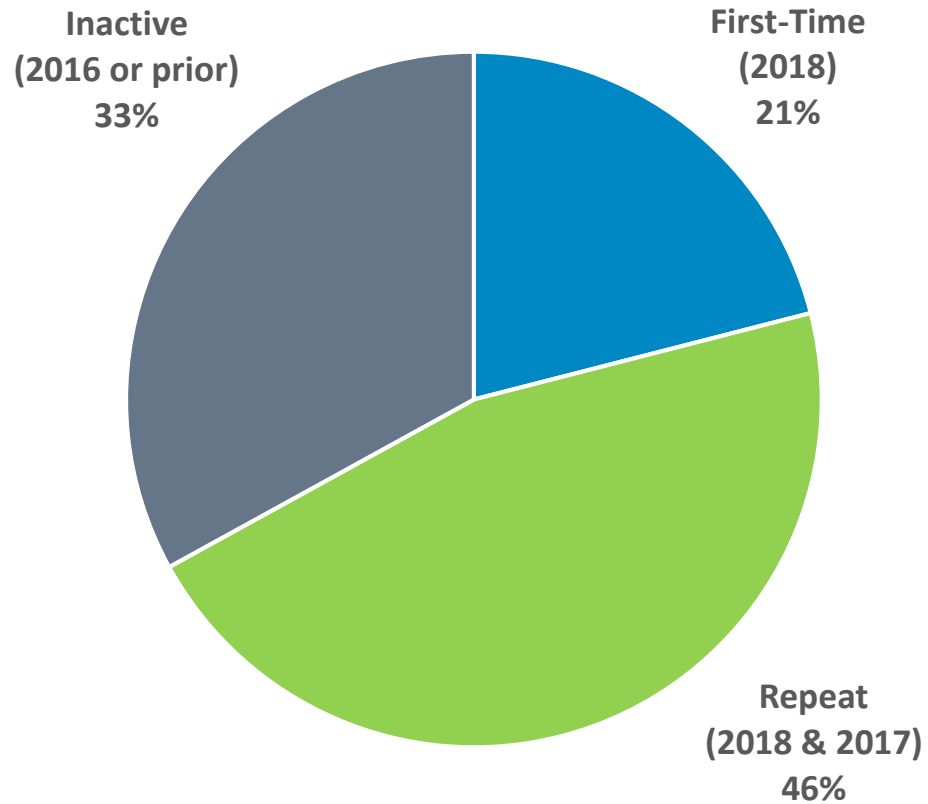


Variance in Estimated Visitation to 2017



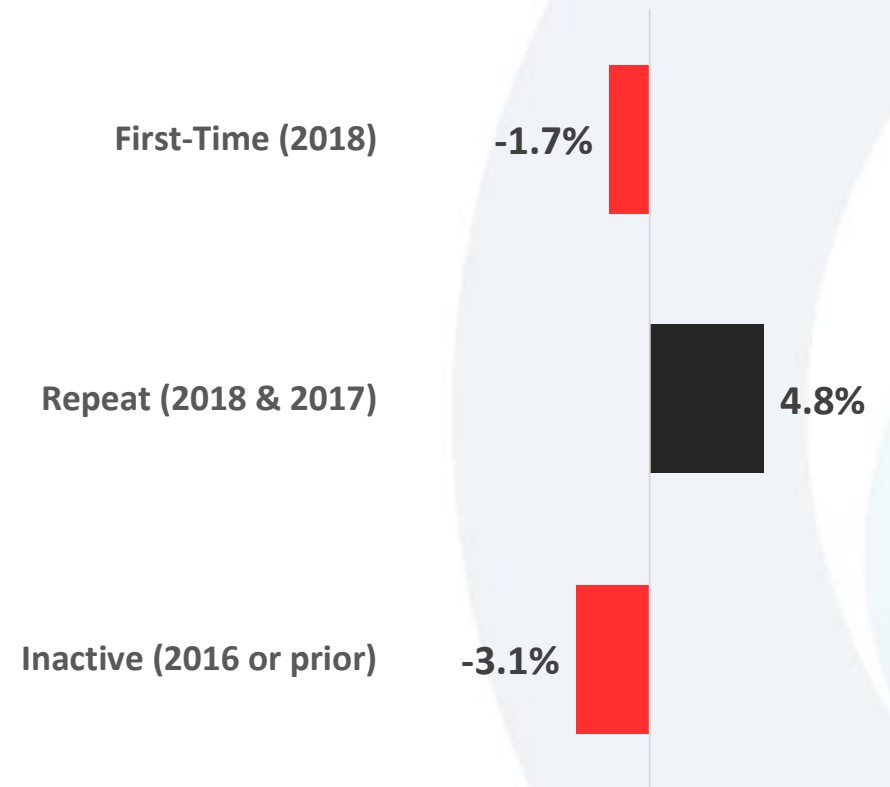
In 2018, Branson hosted a larger number of Repeat Visitors (+4.8 pts). The average Branson traveler visited the area 2.3X over the past 12 months.

Visitation to Branson



2.3
Visits in the Past 12 Months

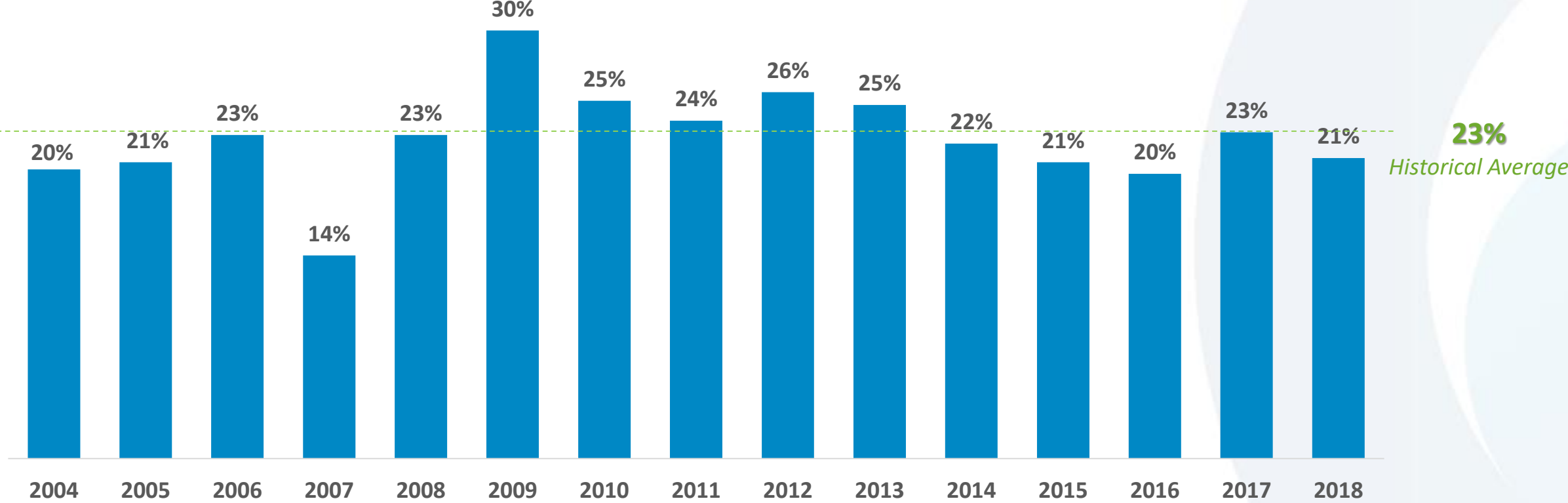
Variance to Last Year



Q4: Which of the following best describes this visit to the Branson/Lakes area?
 Q5: How many times have you visited Branson in the past 12 months - including this visit?

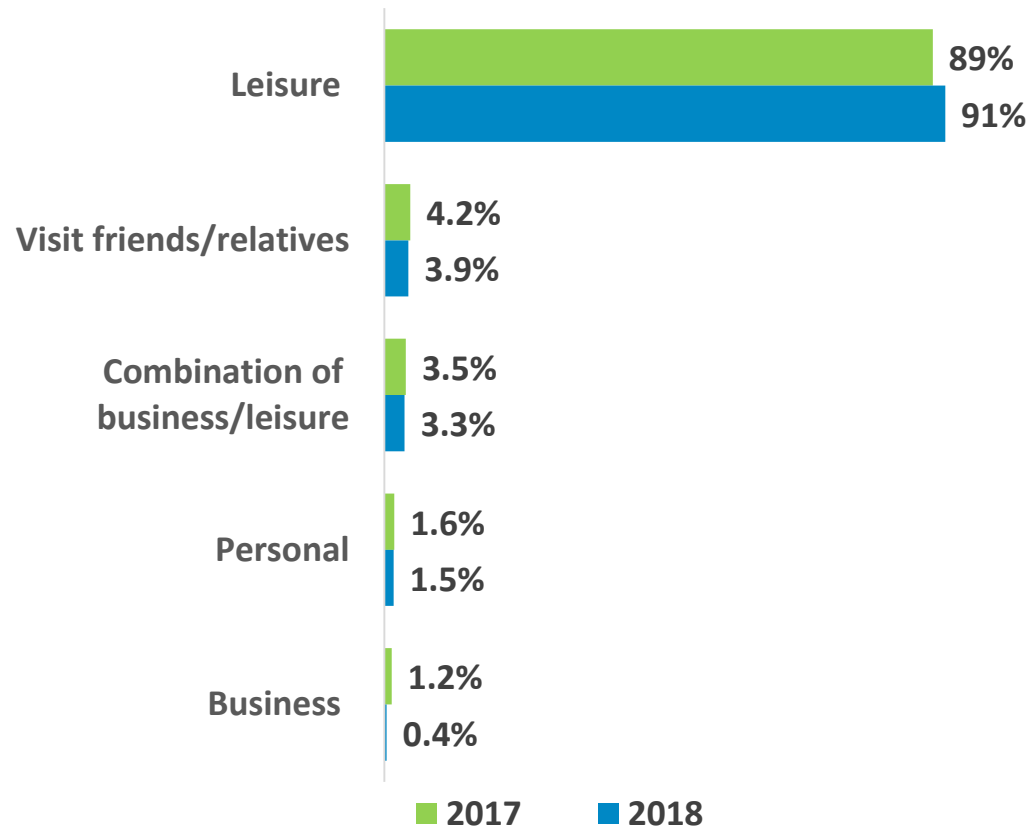
First-time visitation slipped a bit this year after experiencing big growth in 2017, falling slightly below the Historical Average.

History of First Time Visitation



Leisure travel continues to be the primary purpose of visitation to Branson. Decision time increased again this year, up 6 days to 68.

Primary Purpose of Visit



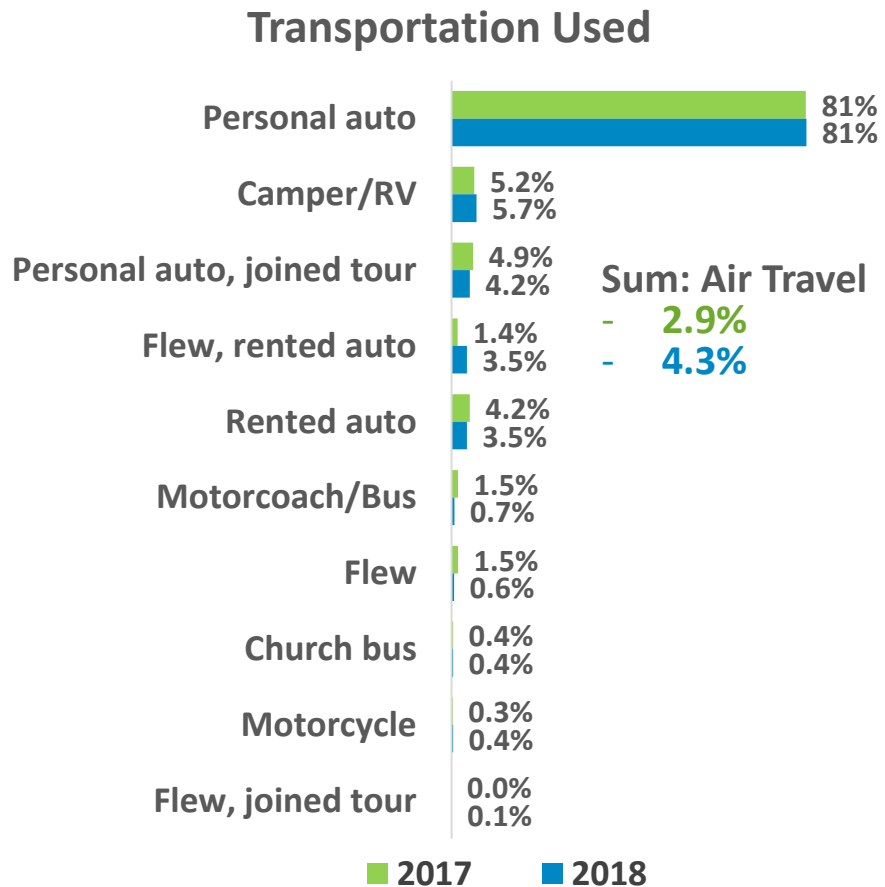
Days in Advance Decided to Visit



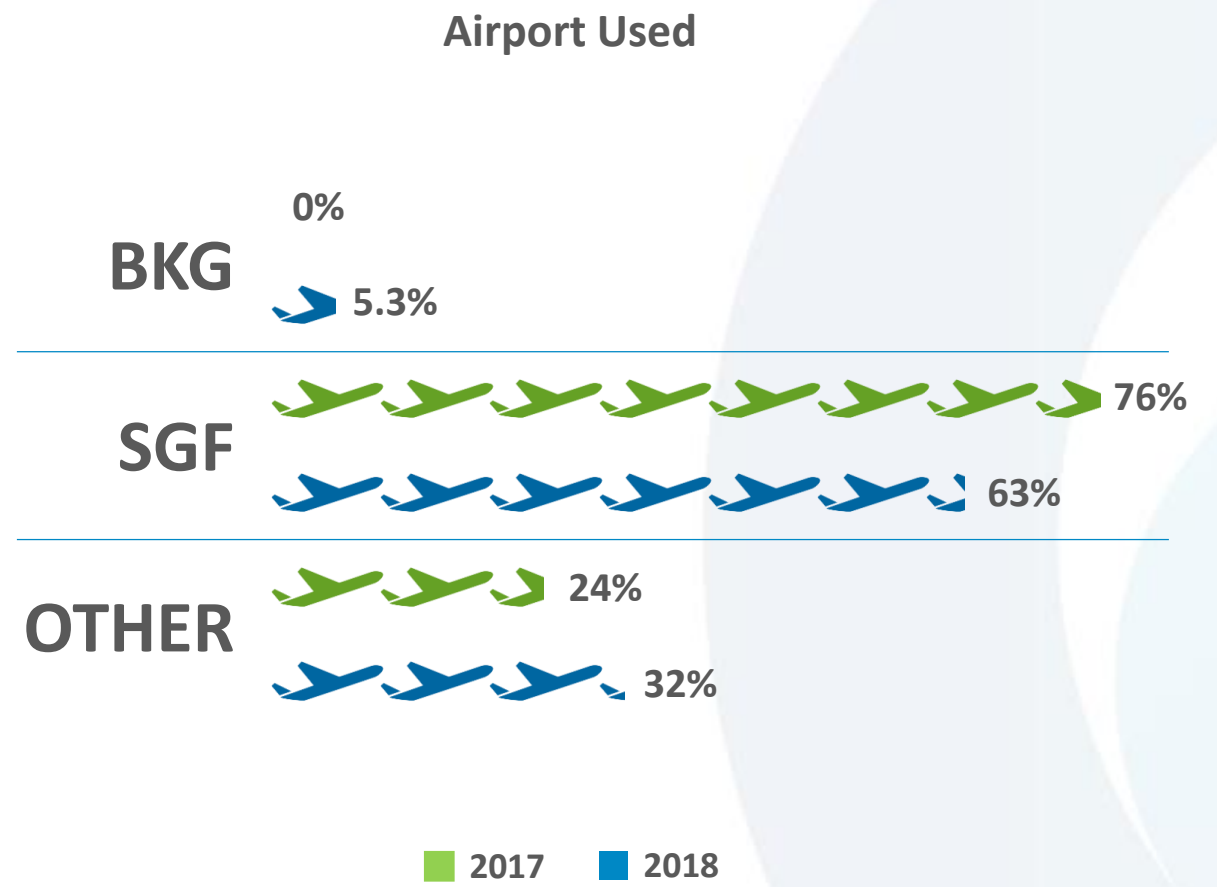
Q6: Which of the following was your primary purpose for this visit?

Q7: How many days in advance did you begin to consider making this trip to the Branson/Lakes area?

Personal autos remain the most popular mode of transportation. And, for those who fly, the Springfield-Branson National Airport remained the most popular.



RESPONDENT BASE: ALL RESPONDENTS | N=1,352

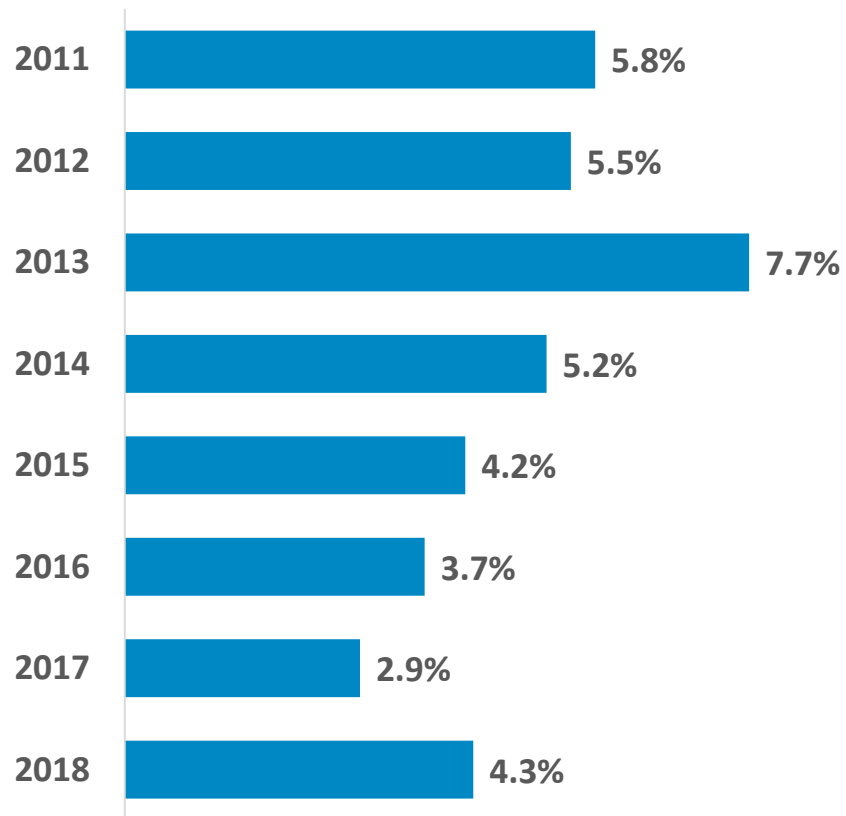


RESPONDENT BASE: RESPONDENTS WHO FLEW TO THE AREA | N=60

Q10: How did you travel to the Branson/Lakes area on this most recent visit?
 Q11: Which airport did you use?

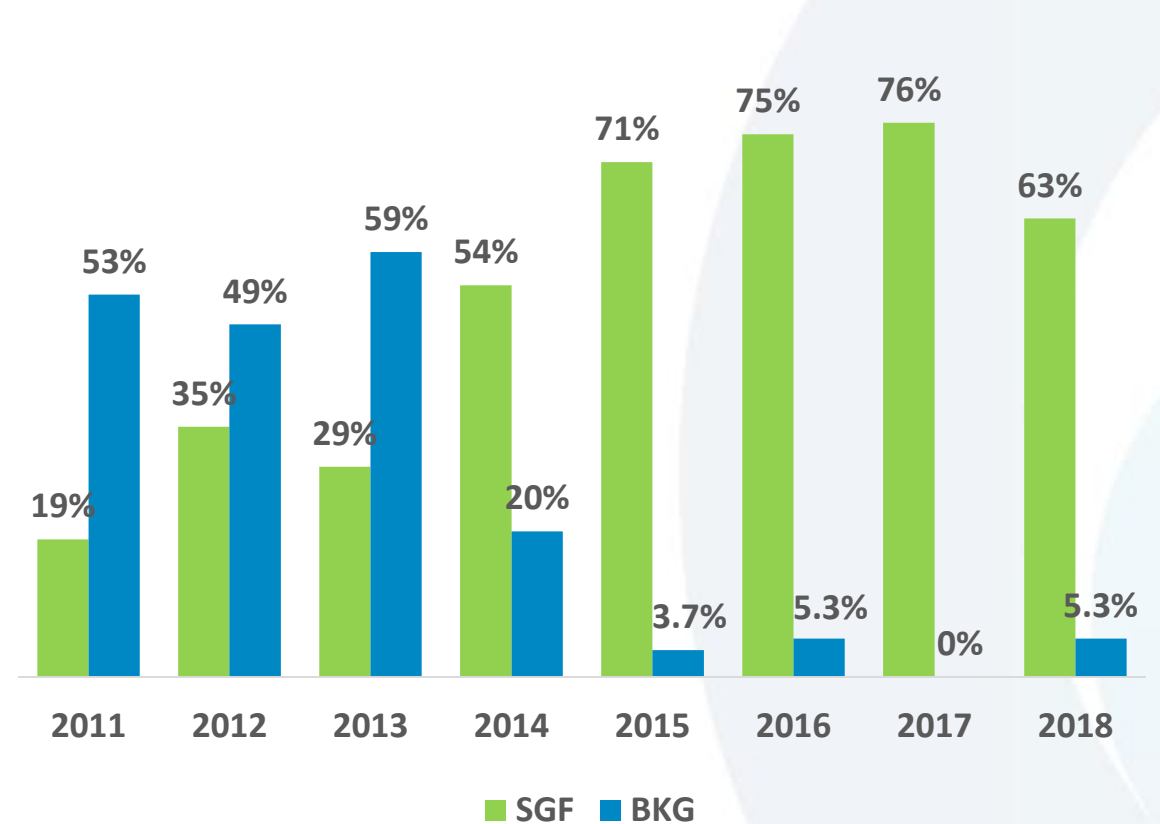
Branson visitors who use air travel rebounded in 2018, with a small percentage of visitors choosing to use the Branson airport.

History of Air Travel to Branson



RESPONDENT BASE: ALL RESPONDENTS | N=1,352

Airport Used

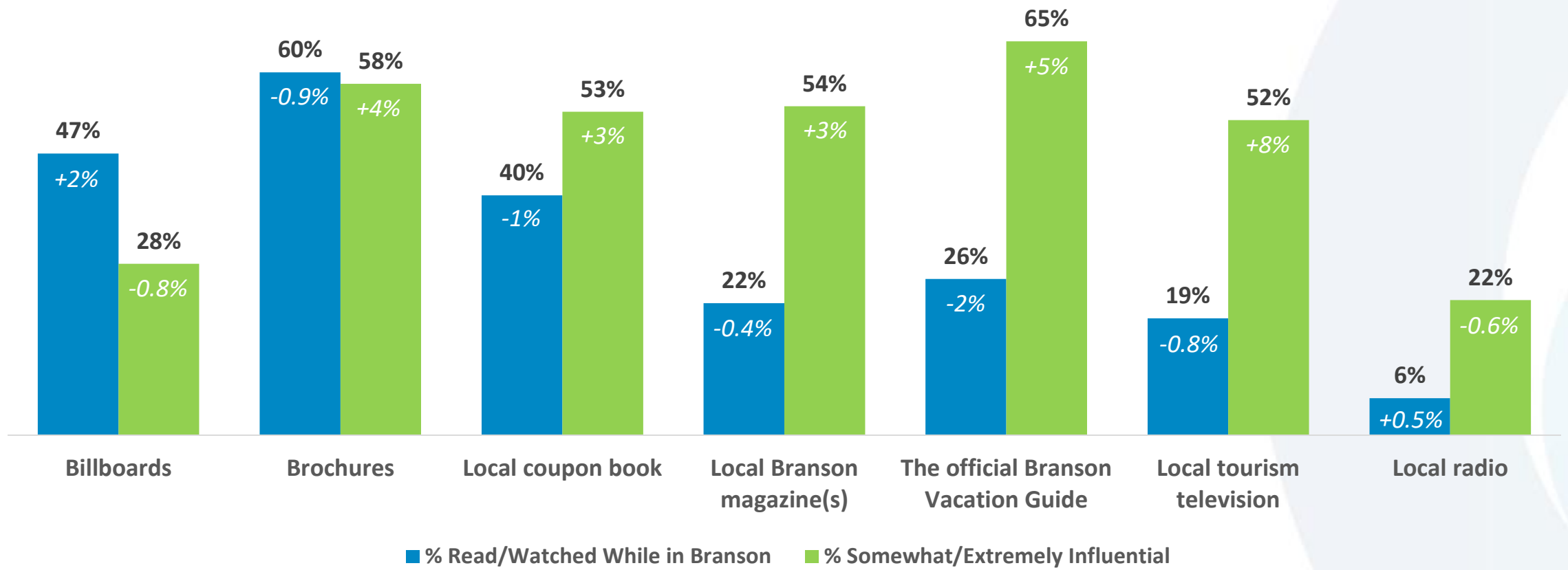


RESPONDENT BASE: RESPONDENTS WHO FLEW TO THE AREA | N=60

Q10: How did you travel to the Branson/Lakes area on this most recent visit?
 Q11: Which airport did you use?

In-market media usage decreased across most intercept media sources this year. However, overall usage remained consistent (83%) and the influence of those media was much higher in many cases.

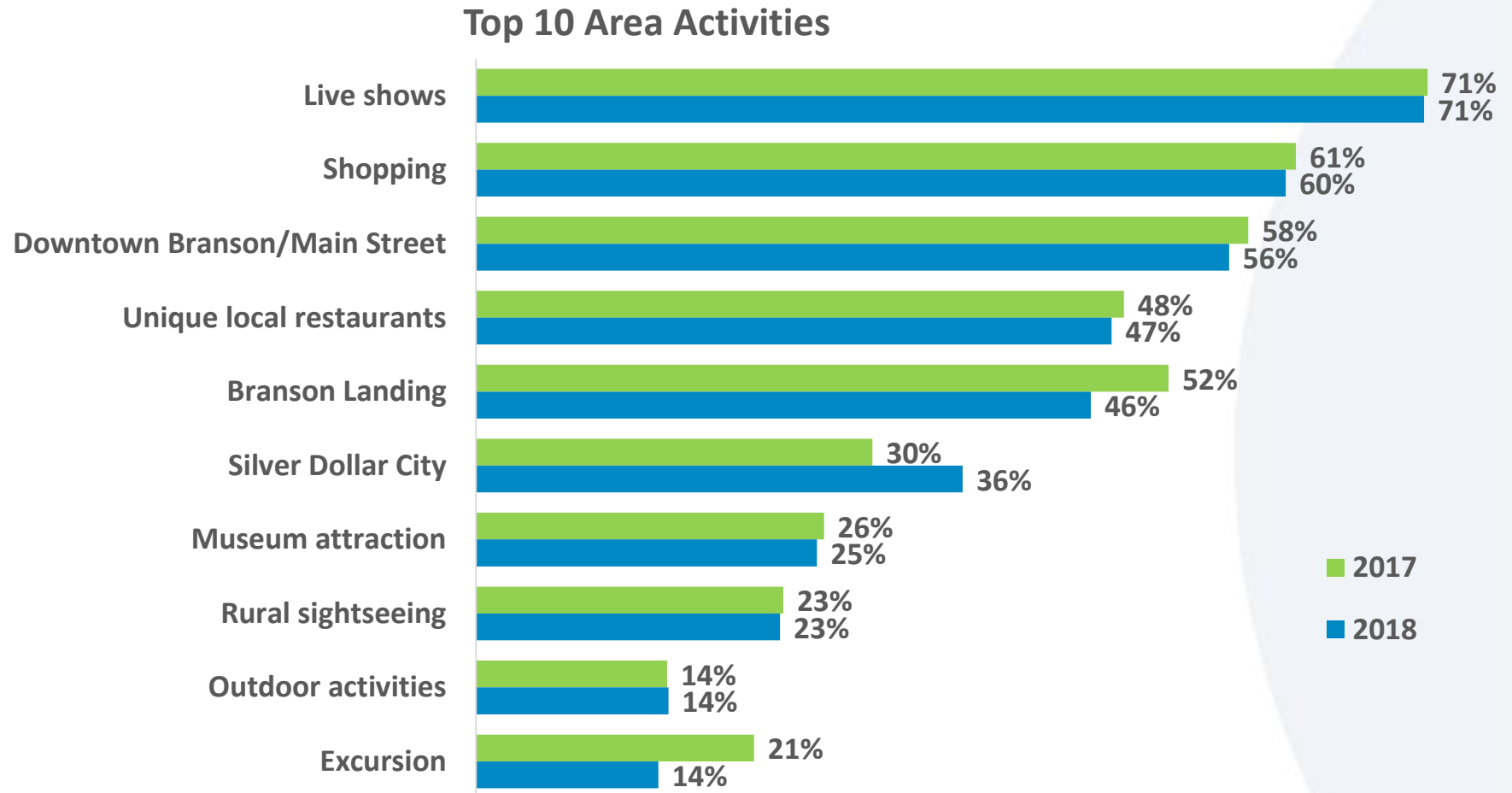
Media Usage in Branson



White numbers represent variance to 2017

Q12: Which of the following local media, if any, did you read or watch during this most recent visit in Branson? Please select all that apply.
 Q13: Using the scale provided, please rate how influential each of these media were at persuading you to visit specific shows, attractions, restaurants, etc. (5-pt. scale)

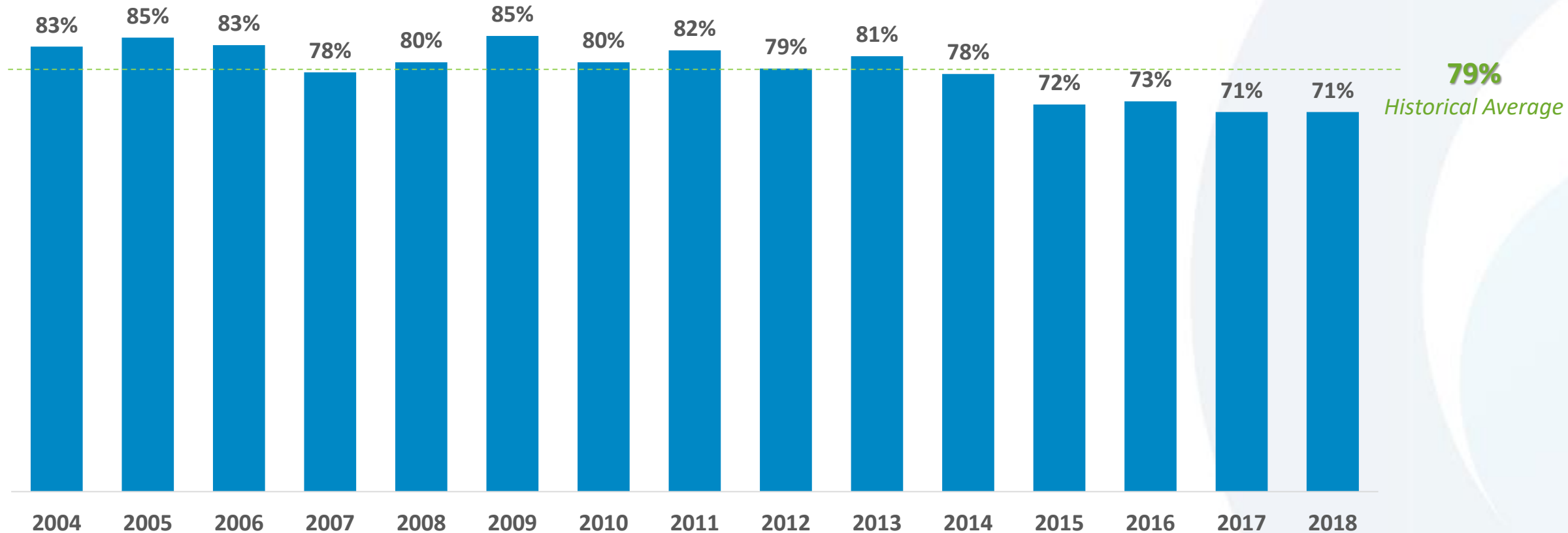
The top area activities continue to be Live Shows, Shopping and Downtown Branson. Although, Silver Dollar City posted a significant increase this year with its introduction of Time Traveler.



Q14: Did you do any of the following on this trip to the Branson/Lakes area...? Please select all that apply.

Live Show participation (71%) remained on par with 2017, but remains below the Historical Average (79%).

Live Show Participants



Live Shows (as a category) remain Branson's biggest functional driver, followed by Silver Dollar City (specific brand) and Shopping in general.

Activities That Were a Primary Reason for Visiting Branson



56%

Live Shows

+0 points



31%

Silver Dollar City

+8 points



15%

Shopping

-2 points

3.4

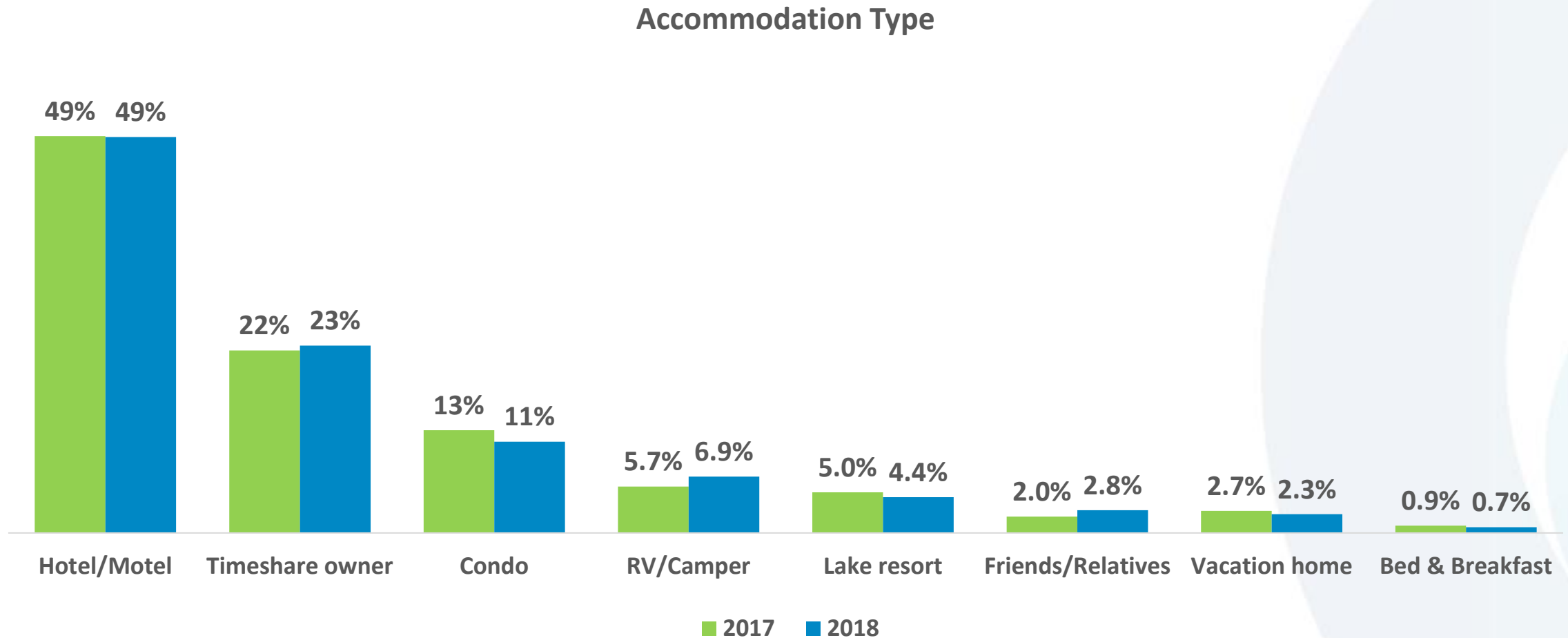
Total Shows Seen
(+0.1 points)

Gray numbers represent variance to 2017

Q15: Which of these activities, if any, were among your primary reasons for visiting Branson on this trip? Please select up to your top 3.

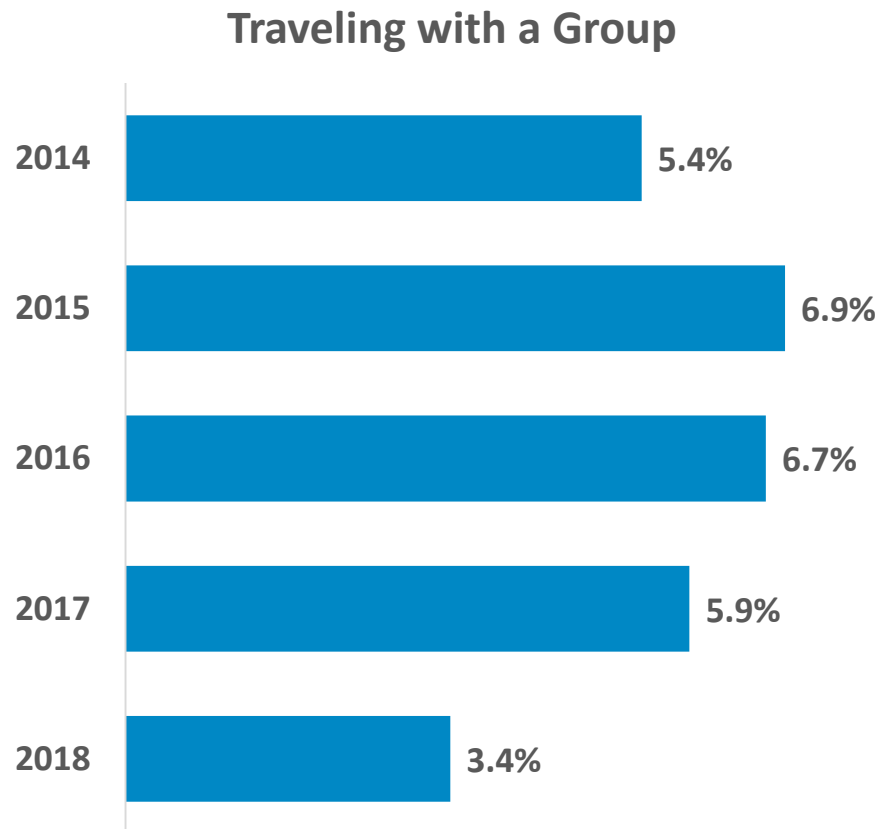
Q16: What is the total number of Branson shows you saw on this trip?

Overnight visitors are most likely to choose Hotels/Motels for their overnight stays. But, this year's gains came from timeshares, RV/Camper stays and Friends/Relatives.

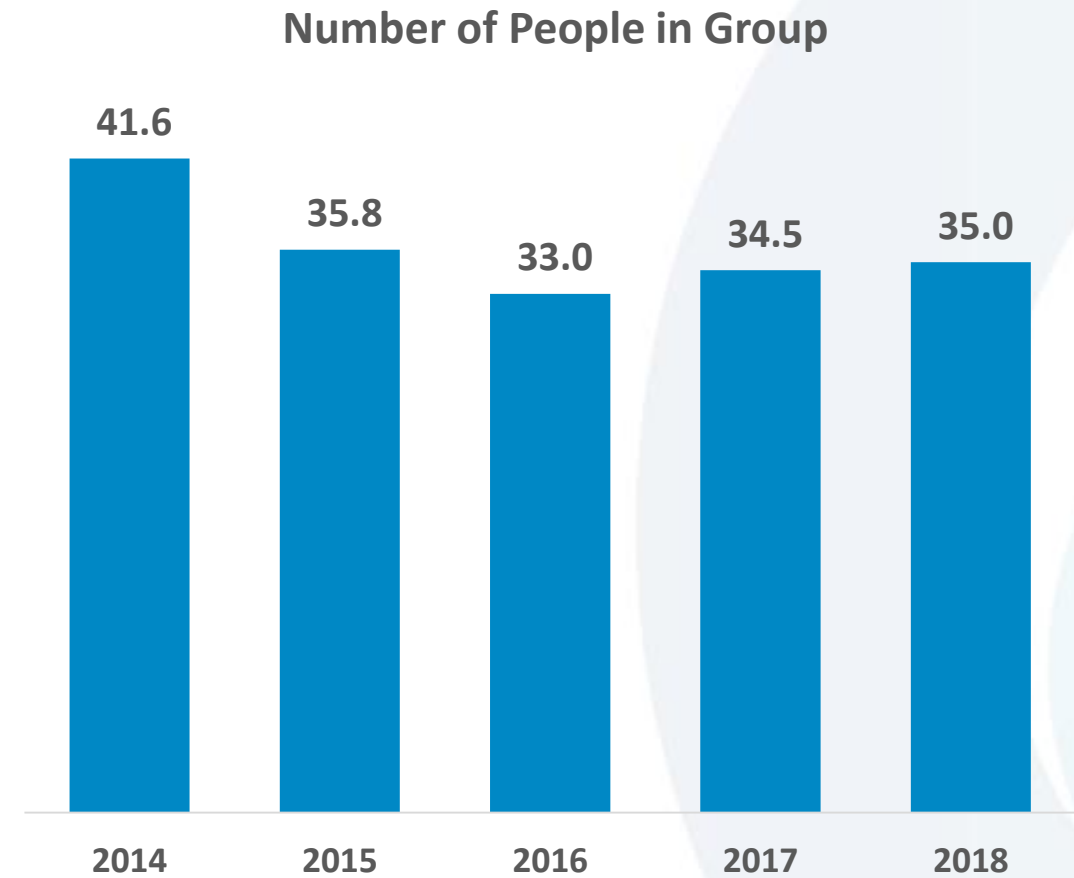


Q20: In what type of accommodations did you stay on this visit?

Group travel dropped slightly this year while the average group size increased slightly.



RESPONDENT BASE: ALL RESPONDENTS | N=1,352



RESPONDENT BASE: GROUP TRAVELERS | N=48

Q24: On this trip to the Branson/Lakes area, were you traveling as part of an organized tour, group activity, or event?

Q25: Approximately how many people were in your total group?

Branson visitors spent slightly more money (+3%) on their trip compared to last year, with First-Time Visitors spending significantly more than Repeat Visitors.



Party Trip Spending

\$972

Past Party Trip Spending

2017 - \$946

2016 - \$911

2015 - \$882

2014 - \$914

2013 - \$985

2012 - \$935

2011 - \$925

First-Time Visitors: \$1,182

Repeat Visitors: \$903



Per Person Trip Spending

\$315

Past Per Person Trip Spending

2017 - \$279

2016 - \$264

2015 - \$252

2014 - \$276

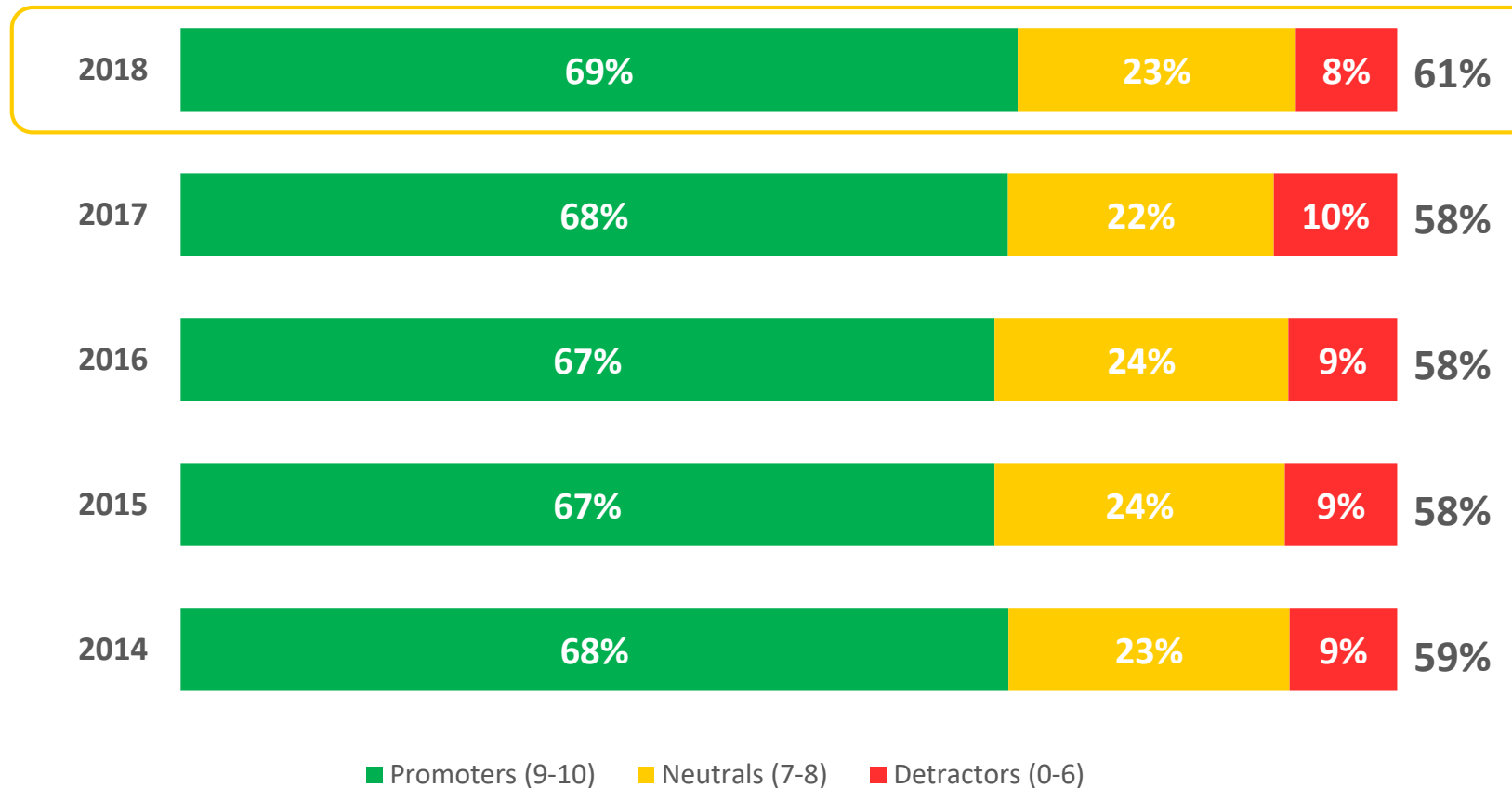
2013 - \$273

2012 - \$266

2011 - \$249

Branson's Net Promoter Score increased significantly this year, up 3 points to 61%, posting a record high score in the 5 years NPS has been asked.

BCVB Net Promoter Score History



"I love Branson area! We vacationed there every year when I was growing up and now I am continuing the tradition with my family. I love that there is so much to do there and we feel safe while enjoying our vacation."

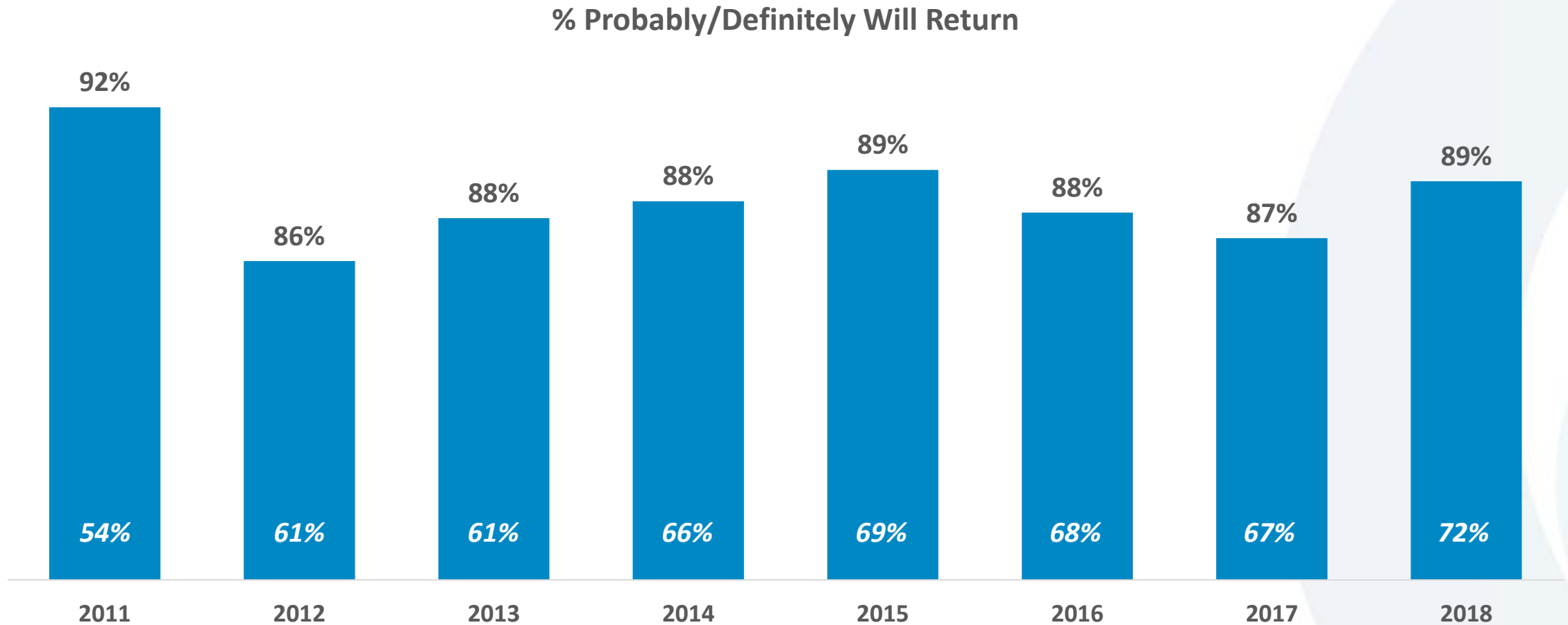
"Branson has a family oriented environment with a variety of entertainment for all ages. The people are friendly. The lake and surrounding area is beautiful."

"The congestion and means to get from one place to another discouraged further exploration of the area."

Q28: Using the scale provided, please indicate how likely you would be to recommend the Branson area to friends and family members. (11-pt. scale)

Q29: Please explain why you chose that score for likelihood to recommend the Branson area.

Intent to return increased in 2018, with 72% indicating they definitely will return next year, a 9-year high.



White numbers represent % Definitely Will Return

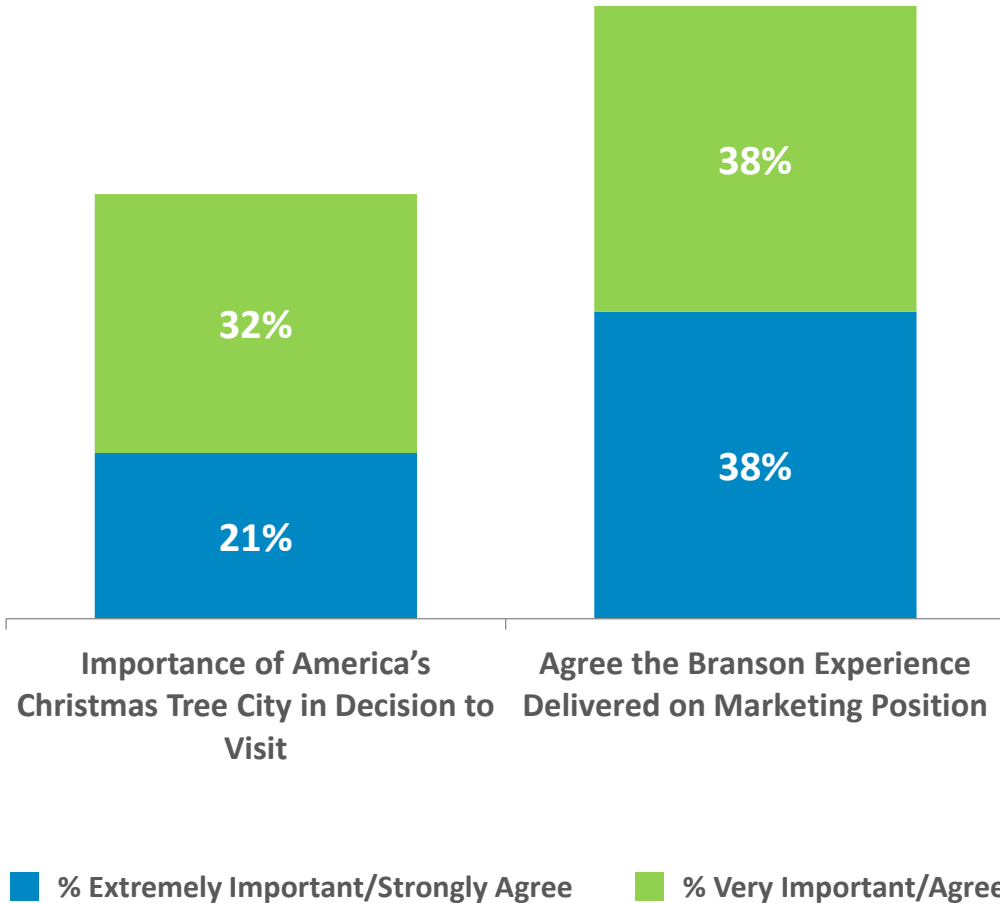
Q30: Using the scale provided, please indicate how likely are you to return to the Branson/Lakes area? (5-pt. scale)

The demographic profile of the Branson visitor revealed a slightly older traveler, but with more parties visiting with children.

	2011	2012	2013	2014	2015	2016	2017	2018
Average Visitor Adult Age	57	59	58	59	59	56	56	58
% Under 12	11%	9%	9%	9%	10%	14%	12%	12%
% 12-17	5%	5%	5%	5%	5%	5%	5%	6%
% 18-34	9%	8%	8%	9%	9%	11%	12%	9%
% 35-54	22%	20%	20%	18%	18%	22%	22%	20%
% 55+	53%	59%	57%	59%	58%	49%	49%	53%
Families	38%	32%	33%	34%	39%	41%	40%	43%
Adults	62%	68%	67%	66%	61%	59%	60%	57%
HH Income	n/a	\$81.2k	\$81.2k	\$82.9k	\$81.2k	\$81.6k	\$82.7k	\$84.7k
% from Beyond 300 Miles	49%	54%	59%	57%	56%	56%	56%	56%

America's Christmas Tree City

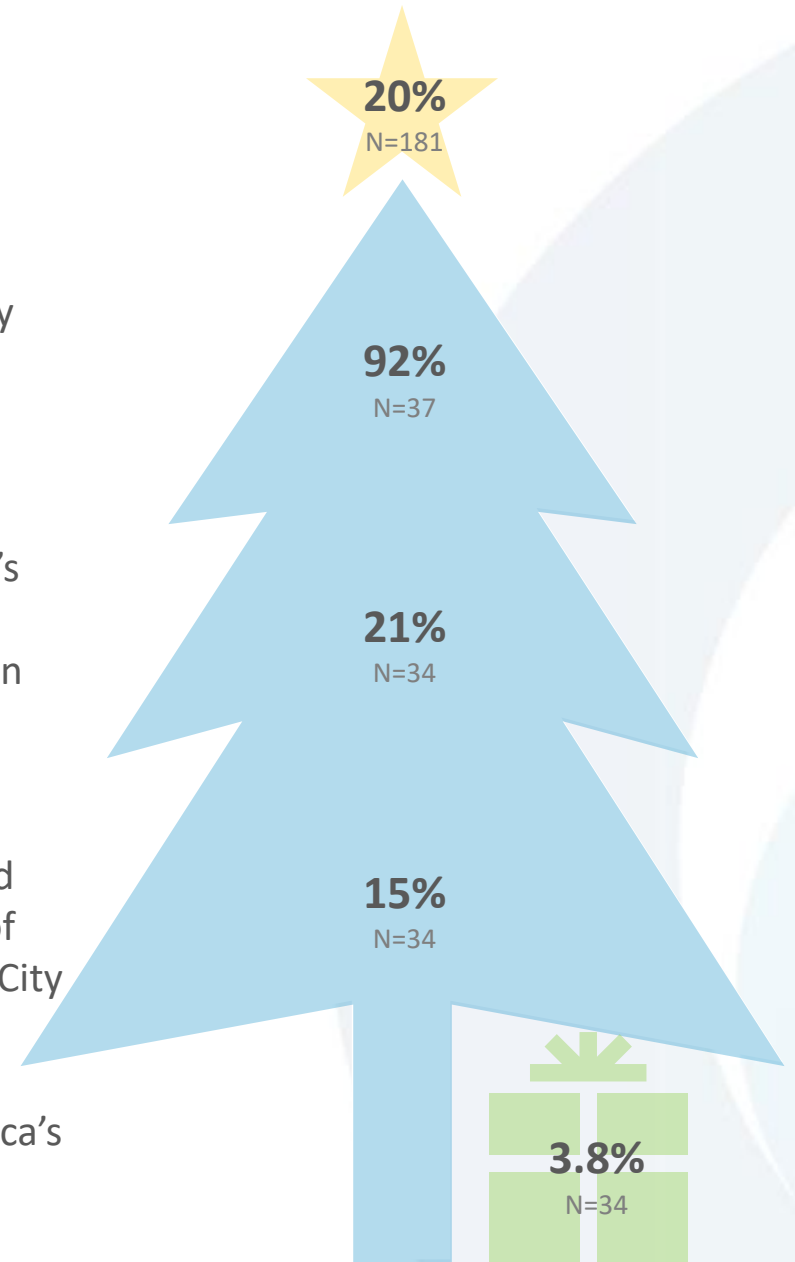
Importance of and Satisfaction with America's Christmas Tree City



Festival Questions: participation, awareness, would not have visited without festival addition, importance of festival addition, satisfaction with festival, importance of festival in decision to purchase Season Pass, intent to visit

*Derived Impact is calculated based on the awareness, participation and importance of the addition.

- Aware of America's Christmas Tree City
- See/Visit/Engage in Any Special Christmas Tree Displays
- Importance of America's Christmas Tree City in Decision to Visit Branson
- Would Not Have Visited Without the Addition of America's Christmas Tree City
- Derived Impact* of America's Christmas Tree City

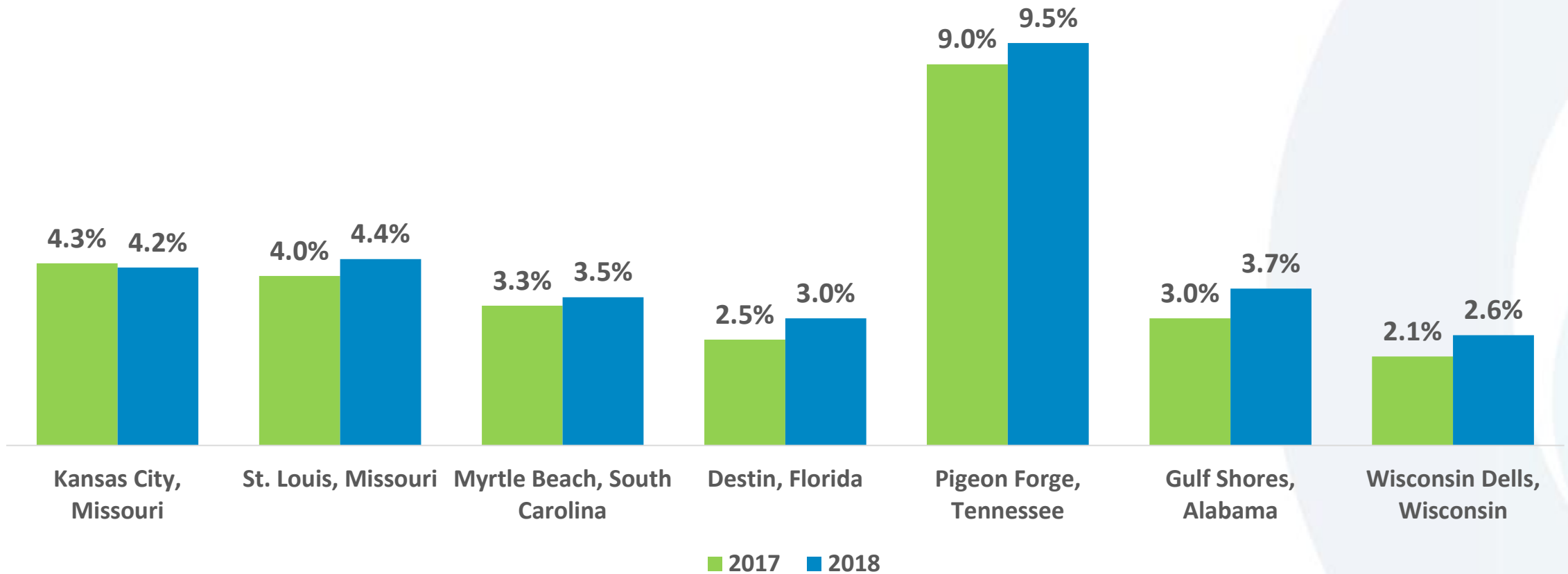


Travel Planning and Future Experiences

03

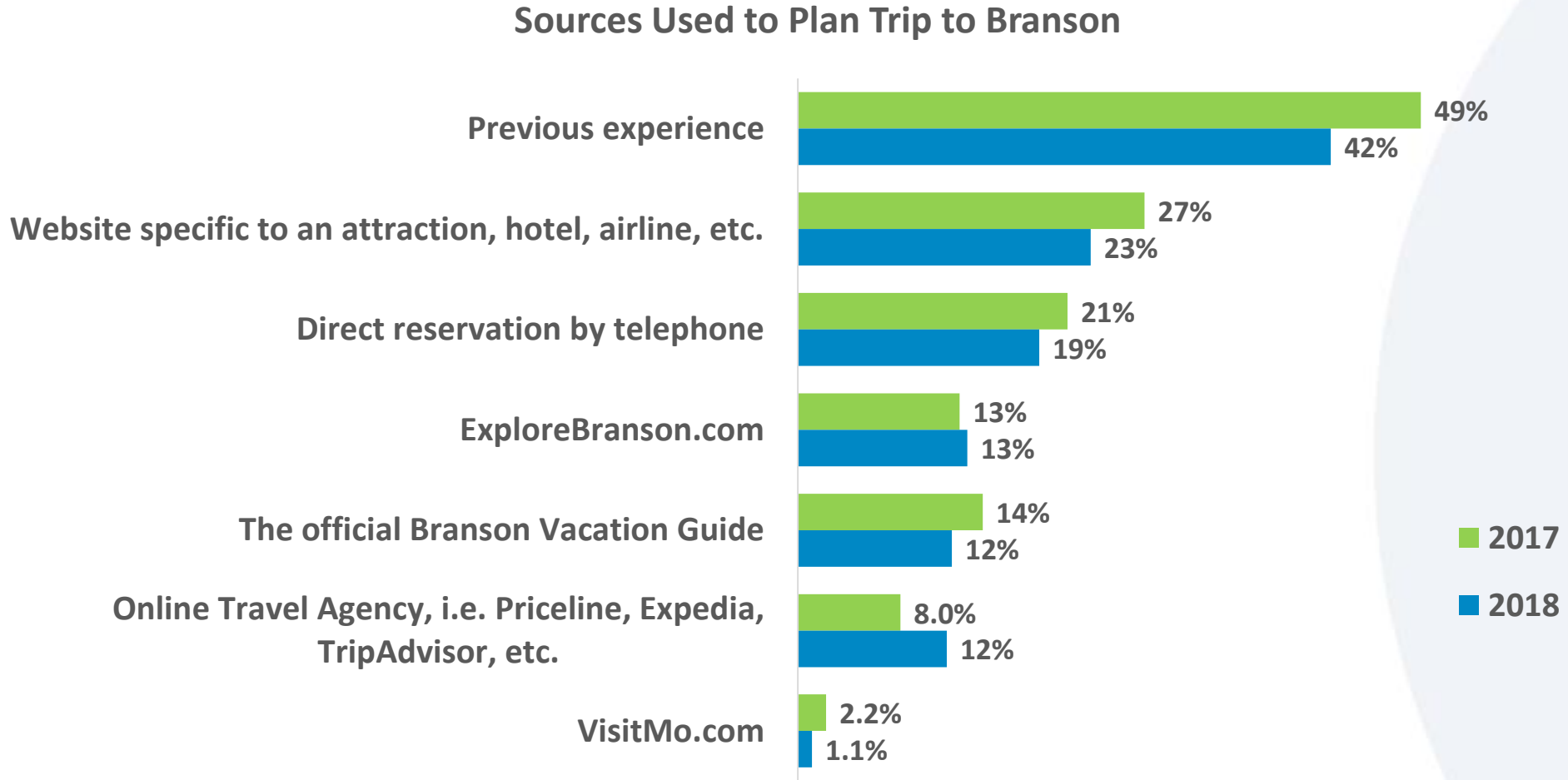
3 in 10 (31%) visitors considered other destinations such as Pigeon Forge (+6%) prior to deciding to visit Branson.

Destinations Considered When Planning Branson Trip



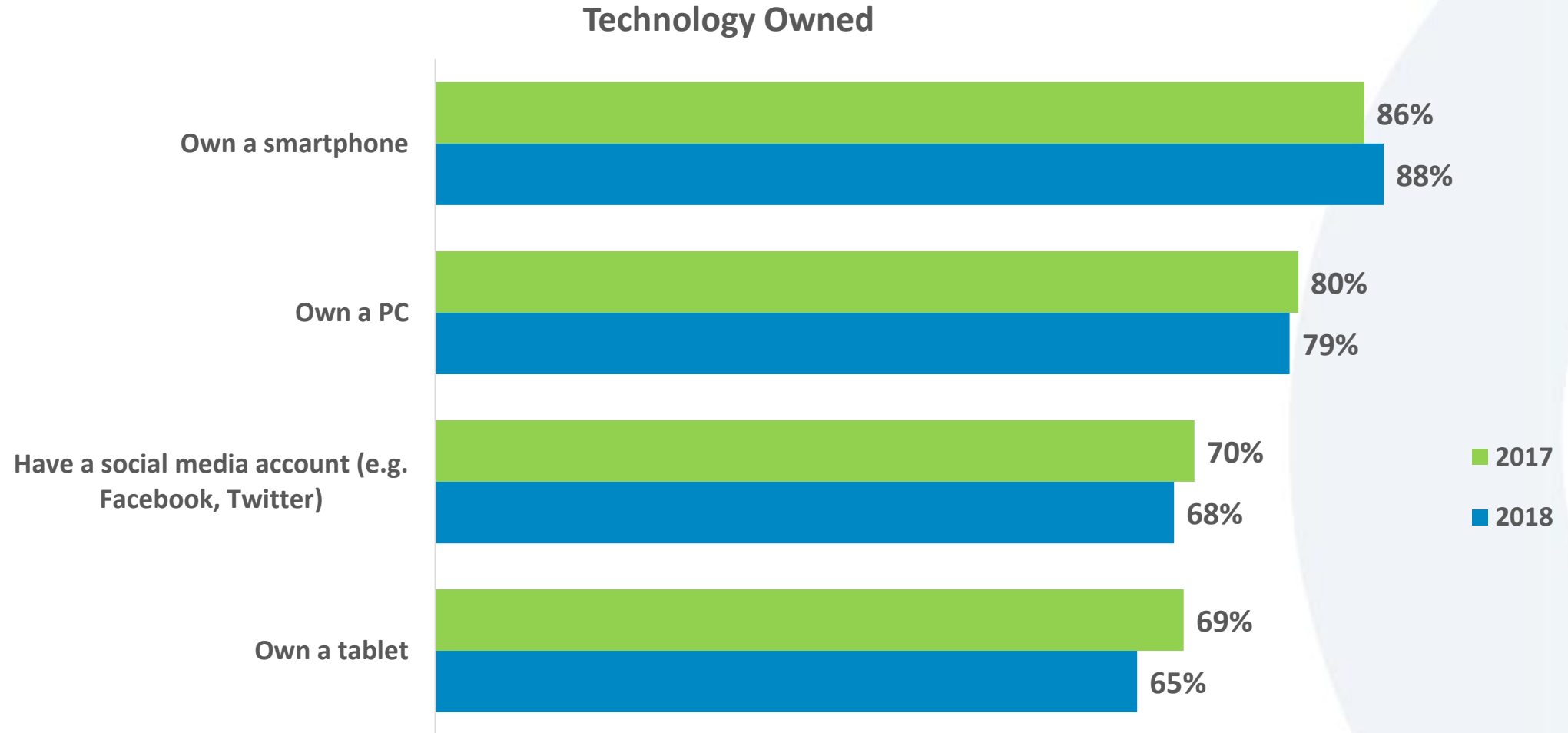
Q3: When making your decision to visit Branson, which other destinations were considered? Please select all that apply.

While previous experience is still the way most plan their trips to Branson, online travel agencies saw a significant increase in usage.



Q8: Which of the following sources, if any, did you use to plan your trip to Branson? Please select all that apply.

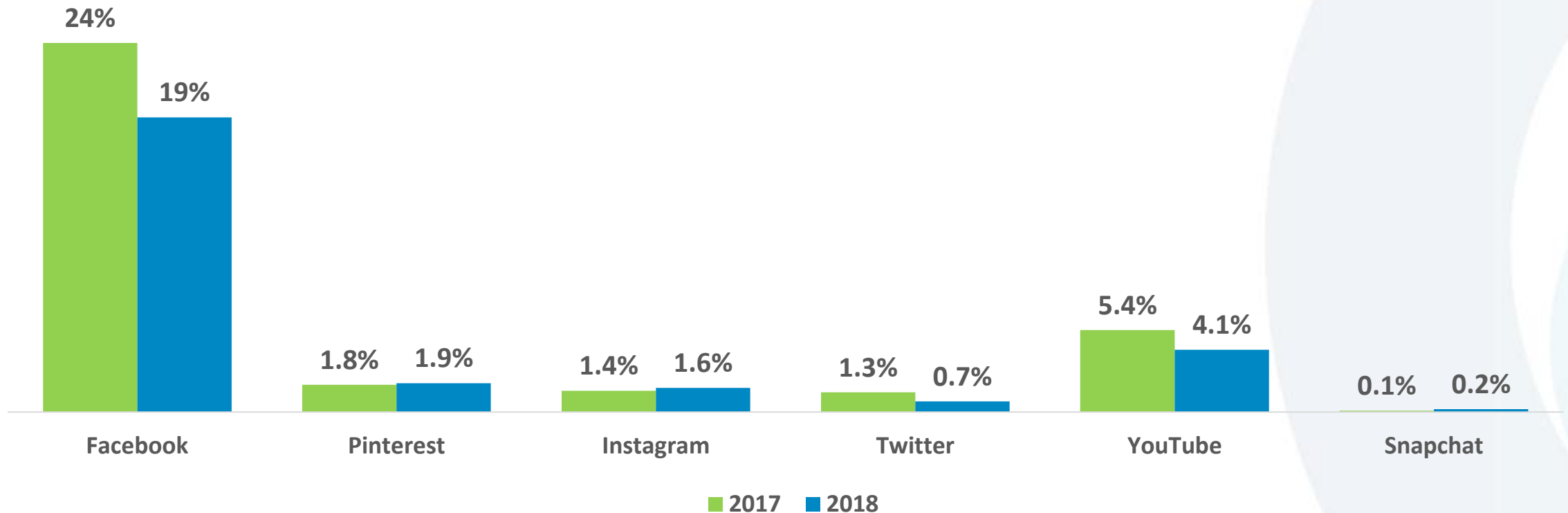
Technology usage and ownership of smartphone devices increased, while other technology and devices decreased.



Q32: Which of the following do you own, use or do: Please select all that apply.

Facebook continues to be Branson's most popular social media site, despite a significant decrease in usage. Usage of other social media channels held steady.

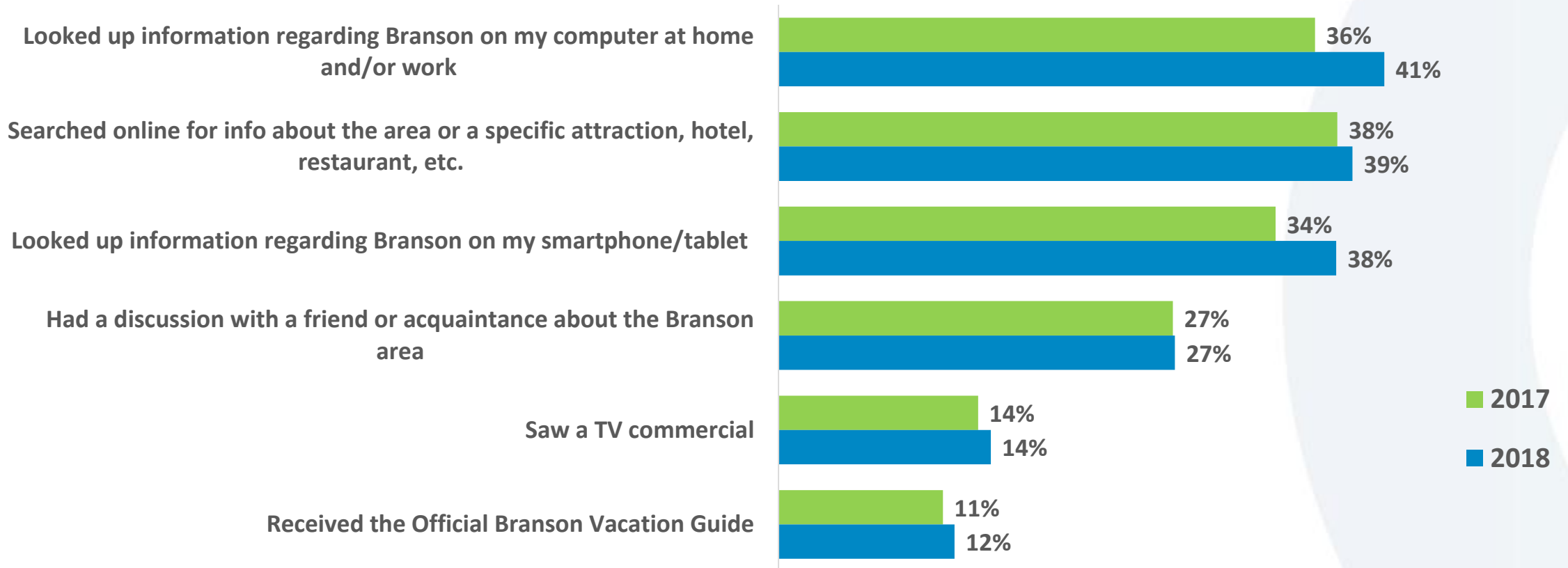
Branson Social Media Usage



Q34: In the past year have you visited any of Branson's social media channels listed below? Please select all that apply.

Branson's top marketing engagement channels continue to be online searches from home computers and/or searches for specific brands.

Top Branson Messages Received, Read, Saw or Heard Prior to Visit

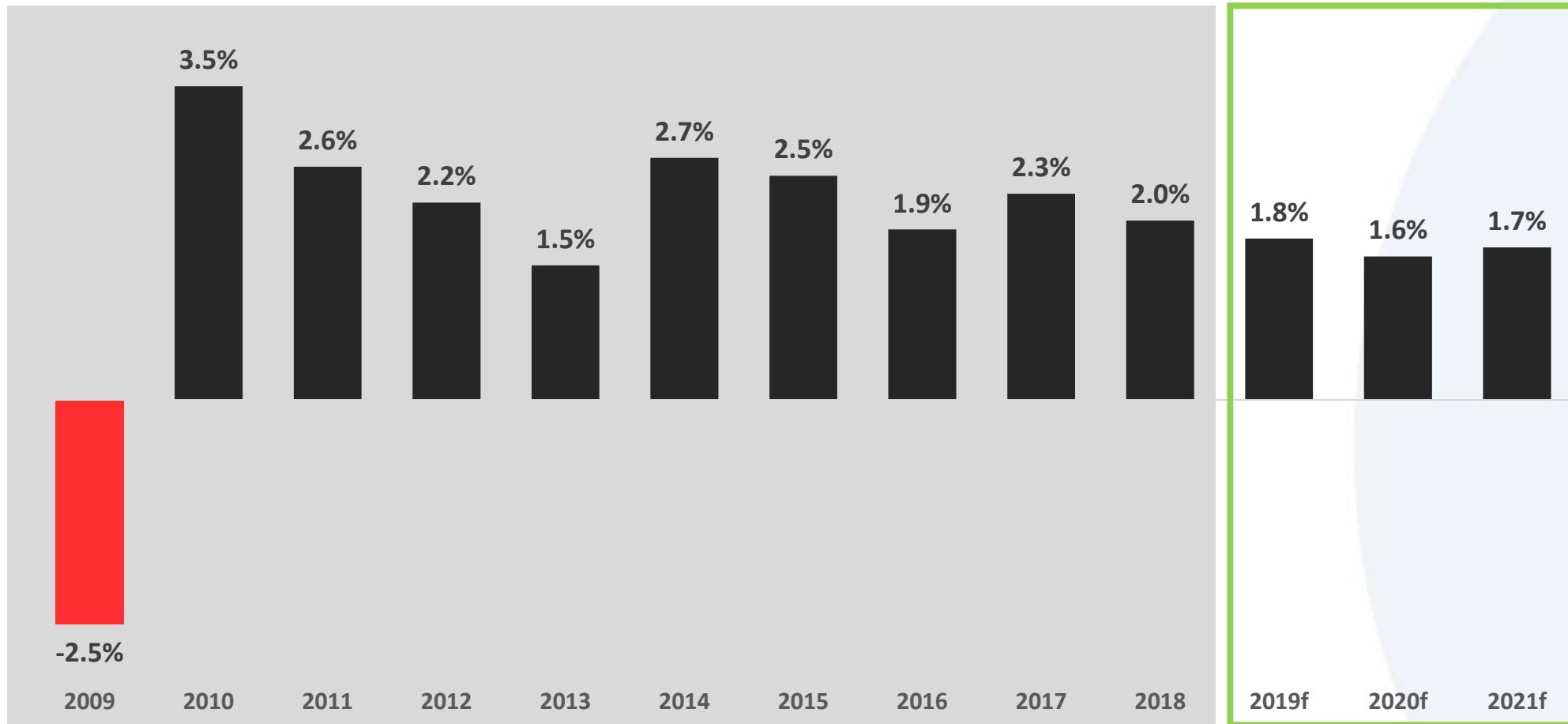


Q35: Please indicate which, if any, of the following Branson messages you received, read, saw or heard prior to your visit: Please select all that apply.

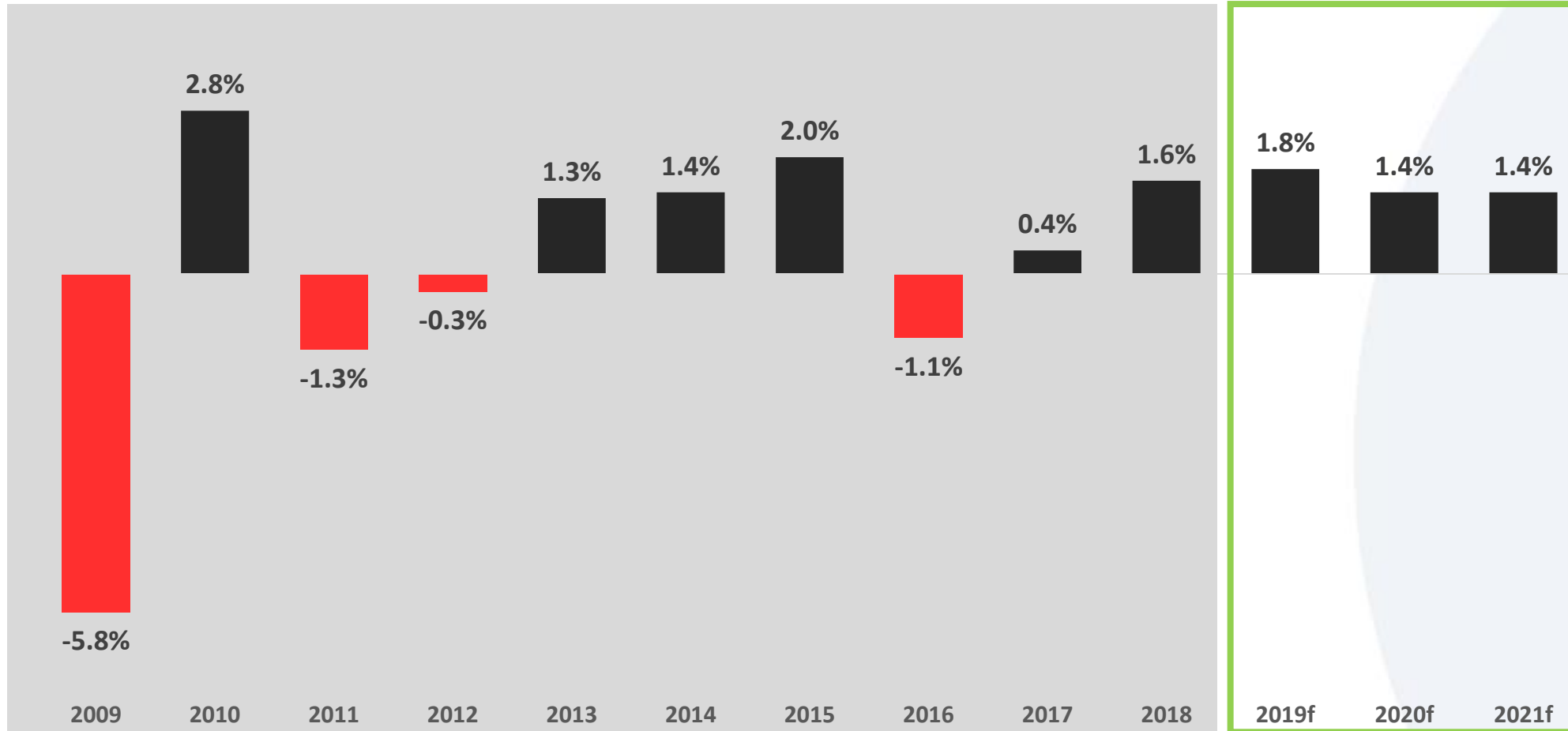
U.S. Travel Performance

04

The U.S. Travel Association forecasts that leisure travel will grow by 1.8% in 2019, slightly slower than what was predicted for 2018 (+2.0%).



Business travel is also expected to grow by 1.8% in 2019, somewhat faster than what was experienced in 2018 (+1.6%).



Thank you! Questions?
