

NOTICE OF MEETING



BOARD OF ALDERMEN

Study Session – Thursday, February 20, 2020 – 12:30 p.m.
Council Chambers – Branson City Hall – 110 W. Maddux

AGENDA

- 1) Call to Order.
- 2) Roll Call.
- 3) Update regarding the Police Department.
- 4) Discussion on additional Marketing Study.
- 5) Mayor's Report.
- 6) Adjourn.

Where Values are the Difference

FEBRUARY: LEADERSHIP

Exhibiting a positive example in leading others toward achievement

For more information please visit www.bransonmo.gov or contact:

Lisa Westfall, City Clerk, 417-337-8522

Posted: February 19, 2020

At: _____ By: _____

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STAFF REPORT

ITEM/SUBJECT: UPDATE REGARDING THE POLICE DEPARTMENT.

INITIATED BY: POLICE DEPARTMENT

MEETING DATE: FEBRUARY 20, 2020

EXECUTIVE SUMMARY:

- This presentation is an update on Police Department Operations including:
 - Reorganization
 - Performance Measures
 - Accomplishments
 - Moving Forward

FINANCIAL IMPACT:

- No impact/Not applicable**
 Budgeted in the current year's budget
 Other (see additional explanation)

STAFF RECOMMENDATION:

- Recommended**
 Not Recommended
 Neutral/None

COMMUNITY PLAN 2030: Good Governance: Presentation provides transparency of police operations and crime prevention crime suppression activities.

ATTACHED EXHIBITS: Exhibit "1" - Powerpoint

A handwritten signature in black ink, appearing to be the initials "JD" or similar, located at the bottom right of the page.

Service * Integrity * Accountability
City of
Branson
Police
Department



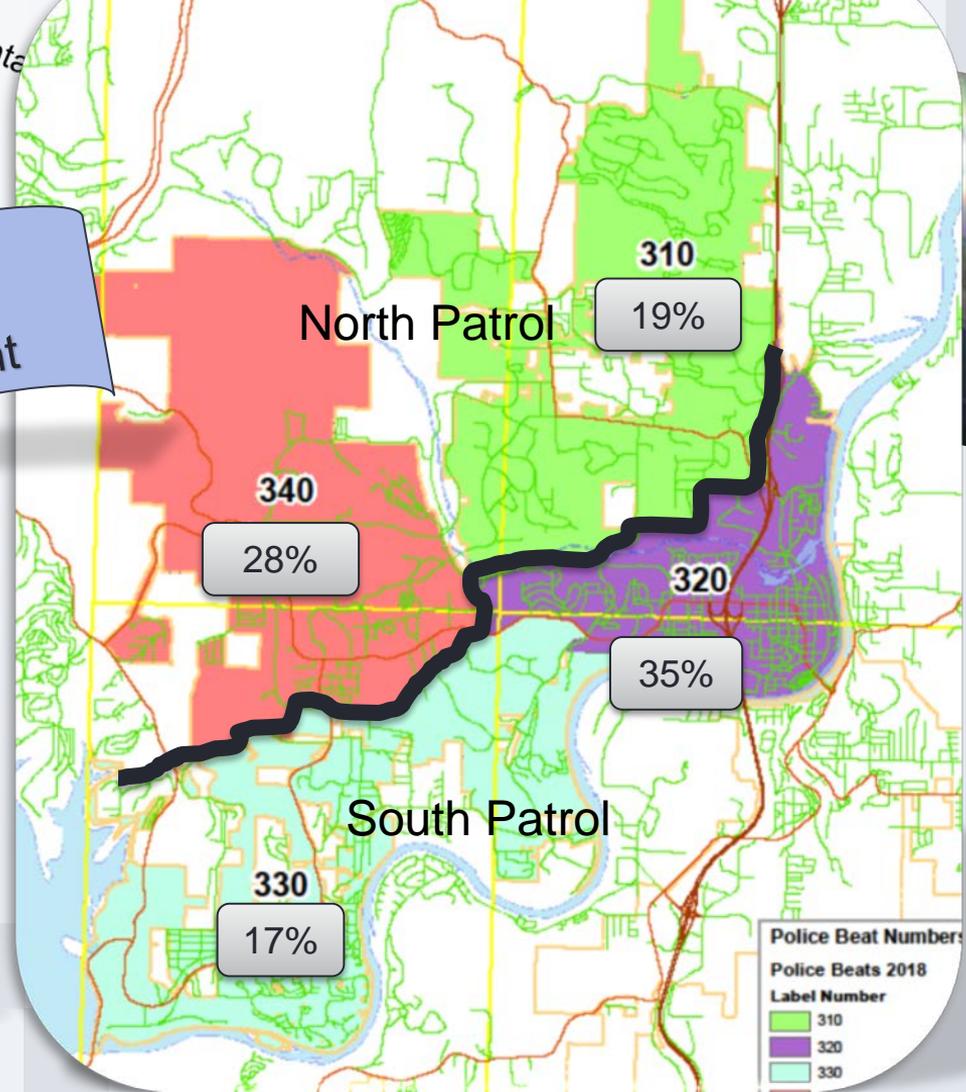
City of
Branson
Police
Department

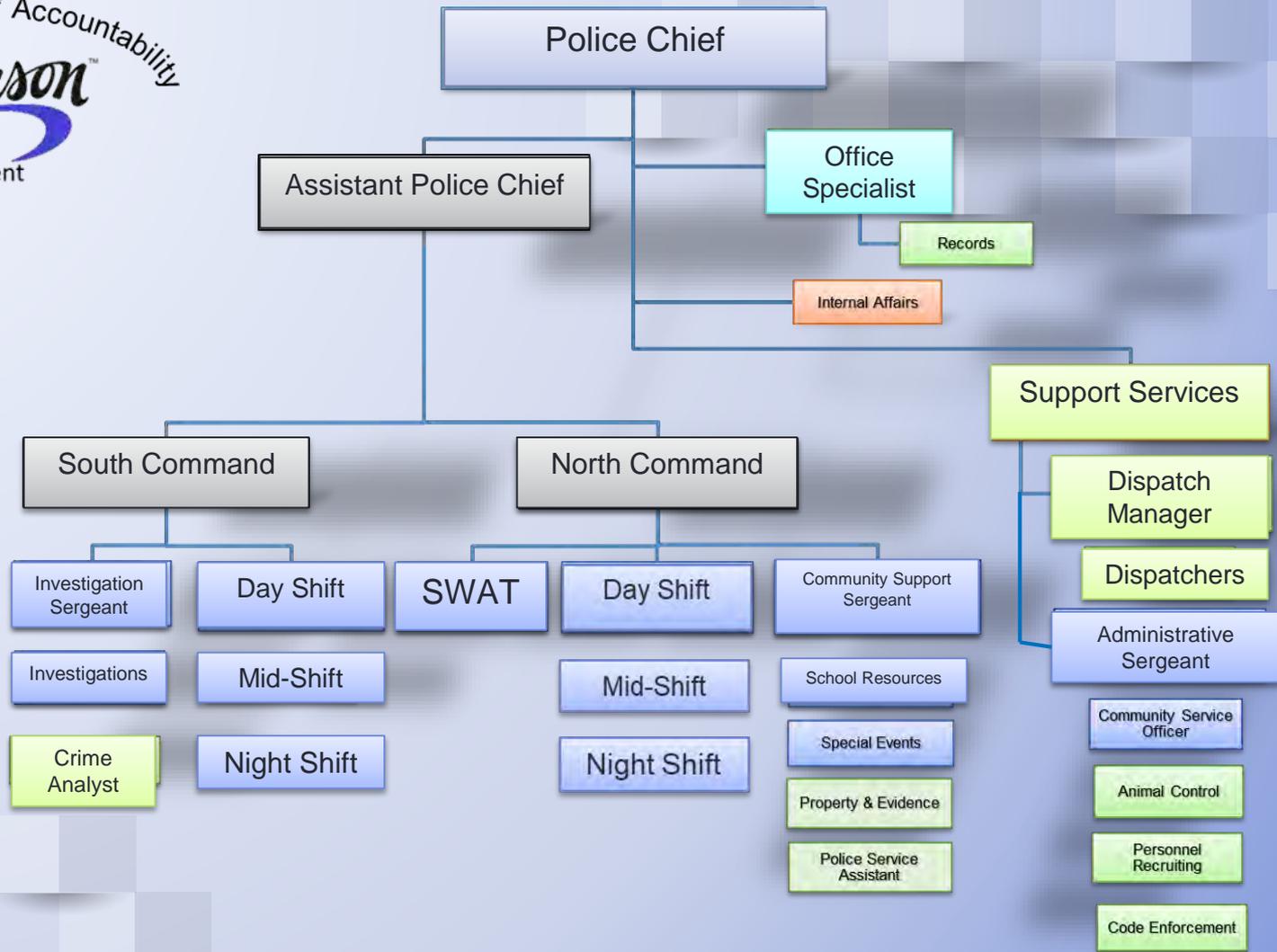
February 20, 2020

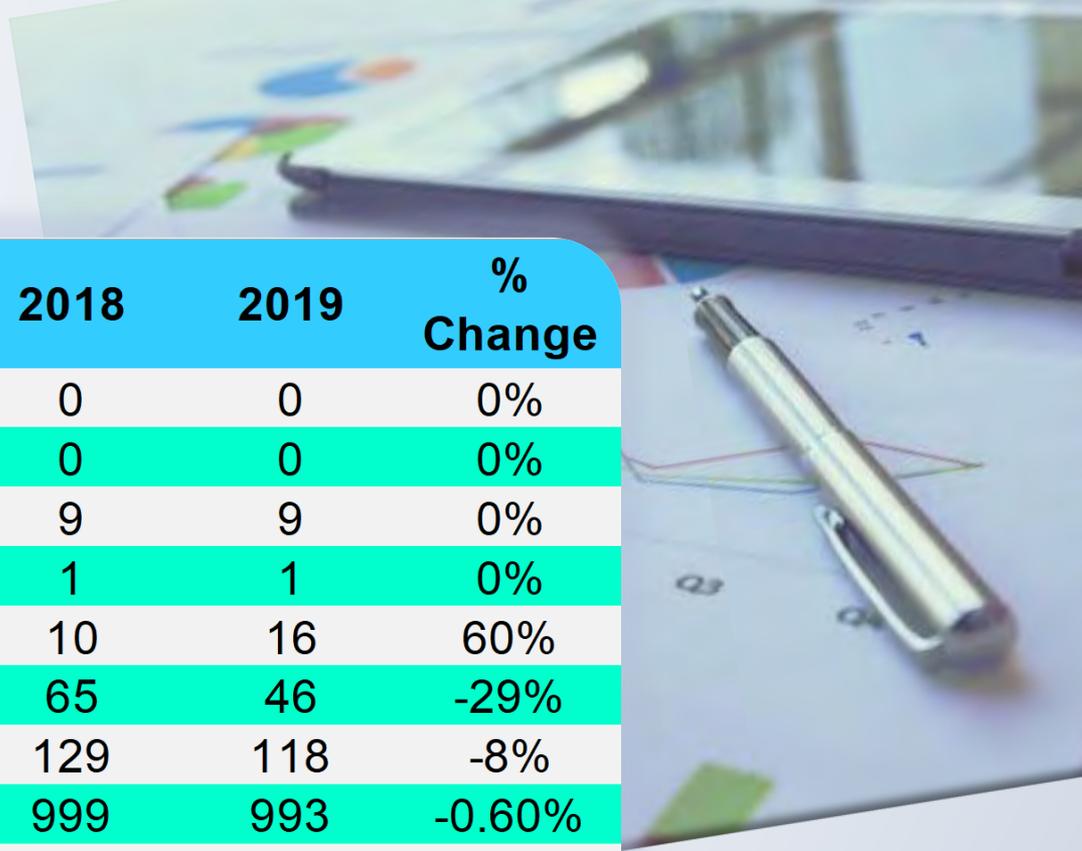
- ❑ Reorganization
- ❑ Performance Measures
- ❑ Accomplishments
- ❑ Moving Forward



2019 Sector
Re-Alignment







Uniform Crime Report	2018	2019	% Change
HOMICIDE	0	0	0%
MANSLAUGHTER	0	0	0%
RAPE	9	9	0%
ATTEMPTED RAPE	1	1	0%
ROBBERY	10	16	60%
AGGRAVATED ASSAULT	65	46	-29%
BURGLARY	129	118	-8%
LARCENY	999	993	-0.60%
VEHICLE THEFT	96	61	-36%
ARSON	4	7	75%
Total	1313	1251	-4.72%

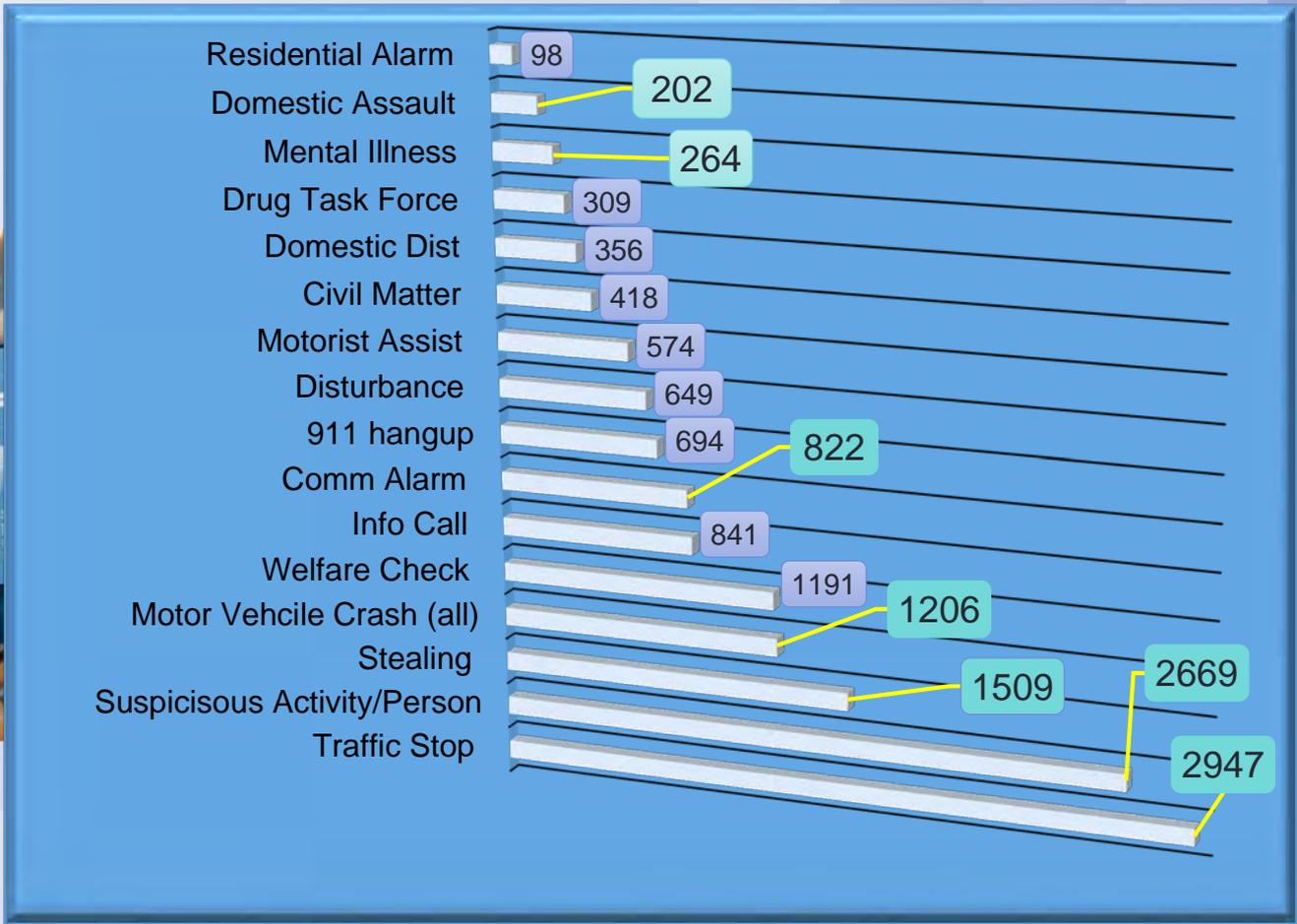
5 Year Comparison

	2015	2016	2017	2018	2019
VIOLENT CRIMES	82	84	81	85	72
PROPERTY CRIMES	1533	1391	1445	1228	1179
TOTAL OFFENSES	1615	1476	1526	1313	1251



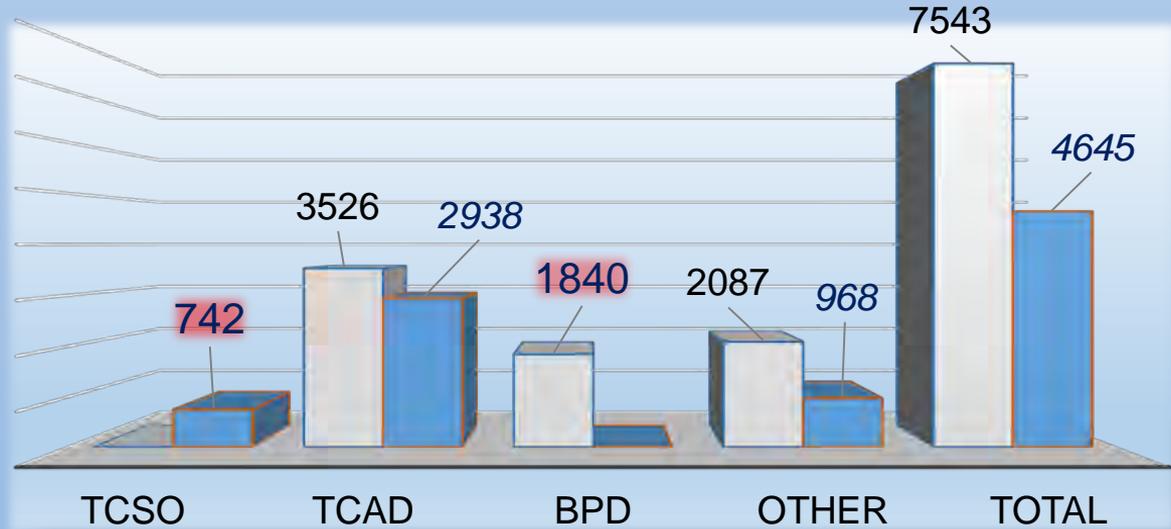
Violent Crime Down 15.29%
 Property Crime Down 3.99%

2019 Top Calls For Service



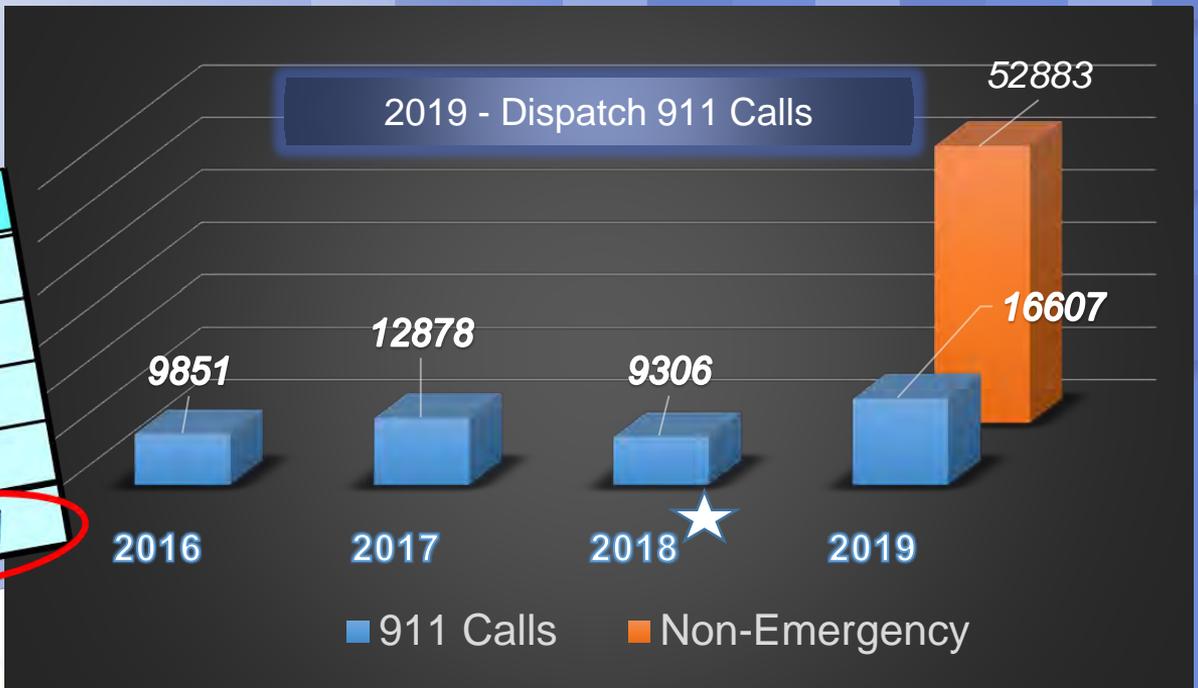


PSAP 911 Call Transfers



□ Taney Couty Sheriff ■ Branson Police

2019 Dispatch Call Activity	
911 Calls	16607
Incoming Admin	52883
Outgoing Admin	31981
Abandoned	948
All Calls	101471



We are encouraging callers to DIAL 911
 911 is for all police/fire/ems response needs

CALLS FOR SERVICE	2018 TOTAL	2019 TOTAL	YEAR +/- %
CD CALLS	30447	32930	+8.16%
BR CALLS	20232	21229	+4.93%
BF CALLS	4868	4980	+2.3%



<i>Other Duties</i>	
<u>NCIC/MULES Entries</u>	<u>Alarm Entries</u>
1522 Warrants	693 Alarm activations
204 Vehicles	80 Alarm notifications
72 Articles	136 Alarm fines
35 License Plates	911 Tapes
2463 Criminal Histories	Jail Reviews



Crime Reductions

Hired Eight Officers

Second K9

Level IIIA ballistic vests

Patrol Go Bags

Asher Training

Social Media

National Night Out

Federal Partnerships

Code Enforcement

Crime Analyst

Tasers

Rifle Program

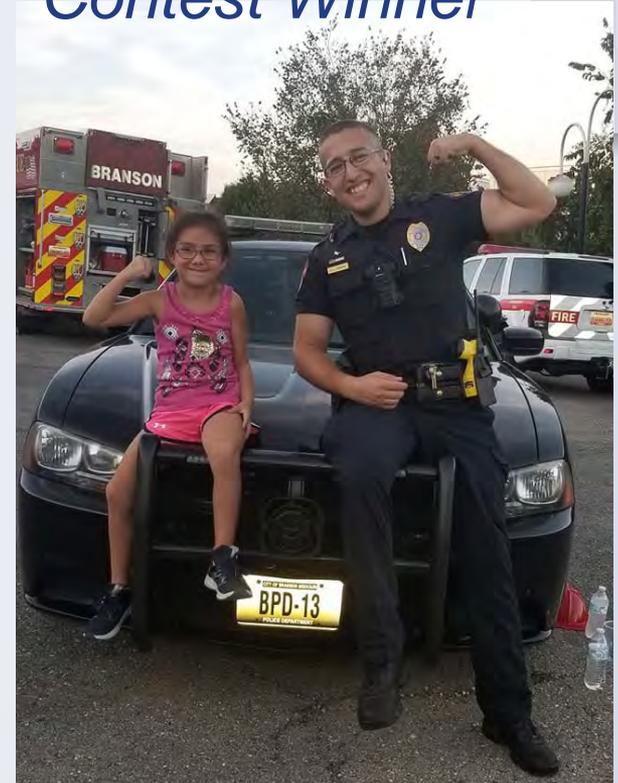
Summer Teen Engagement Program

Citizens Police Academy Alumni

Explorer Program



2020 COPS Office Community Policing in Action Photo Contest Winner





Geographic Accountability
Succession Planning
Employee Development
In-Service Training
Community Engagement
Policy * Procedure * Practices

2020
2019

Service * Integrity * Accountability
City of
Branson[™]
Police
Department



City of
Branson
Police
Department

February 20, 2020

Study Session - Feb. 20, 2020 Item 4

2020 District Marketing Council

Deidre McCormick-Tanger Outlets (CHAIR)

Brett Domeny-Silver Dollar City

Steve Presley-Presleys Theatre

Susan Smith-Welk Resorts

Jody Madaras-All Hands-On Deck Show

Dean Sell-Sight & Sound Theatres

Patrick Cox-State Park Marina/Harbor Marina/Chateau Marina

Sheila Thomas-Table Rock Lake Chamber

Bill Tirone-Hilton Hotels

Julie Wilson-Track Family Fun Parks

Trey Pelz-Branson Wash Company (formerly Clear Marketing)

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Branson CVB

Miles Partnership

miles
PARTNERSHIP

With you

- 10+ Years in Travel Marketing
- Full Stack LAMP Developer
- Oversee MarTech for Miles
- Manage \$50+ Million in Annual Marketing Investment for Clients



Gray Lawry
VP, Strategy & Insights

Meet Miles



Inspired by
travel



By the
numbers



100% travel



275+ travel
experts



8 year
average client
relationship



100+
travel brands



\$100 million
in gross billings

A few of our
clients

Core
services



Strategic
Consulting



Branding &
Creative Services



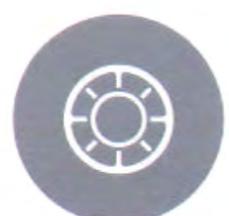
Advertising Services
& Media Buying



Content Creation
& Distribution



Digital
Development



Revenue
Generation
Programs

Client
accolades

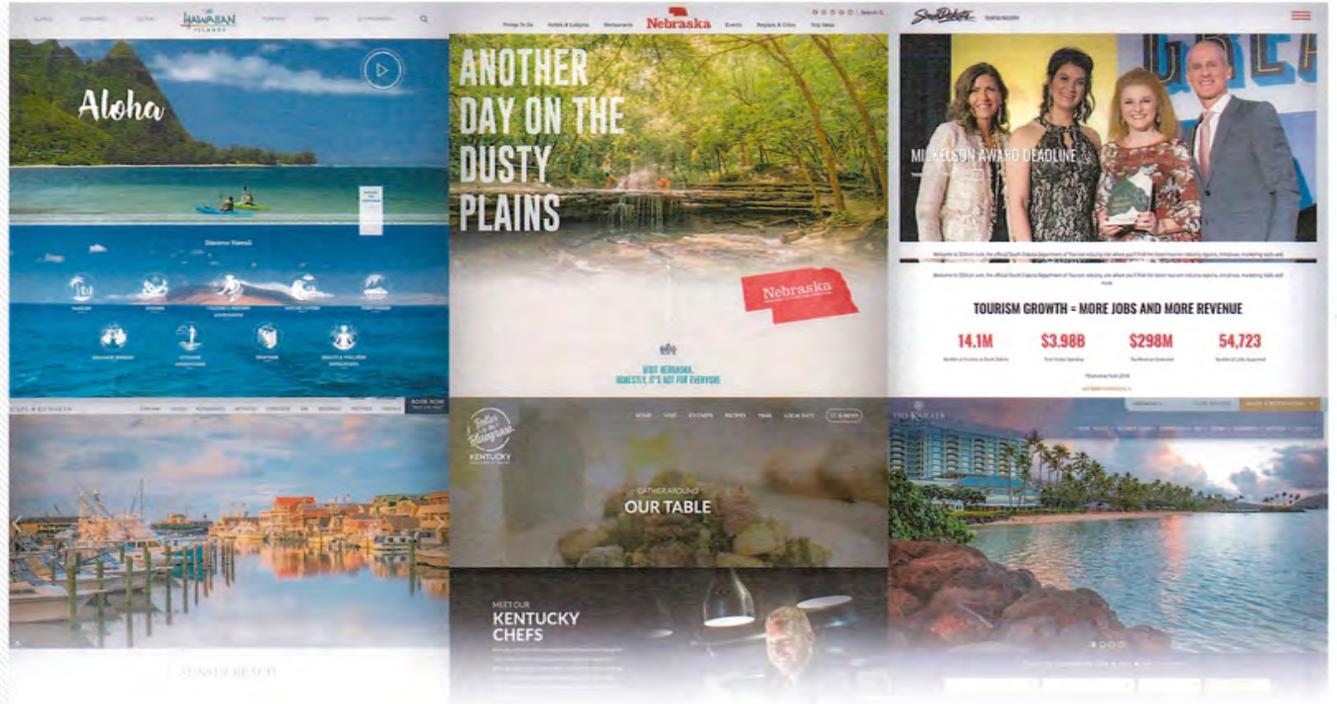
155 awards

over the past three years

across content creation, brand campaigns,
design & website development



Development
experience



5 years in a row
**Outstanding Web
Developer Award**
BY WEB MARKETING ASSOCIATION

Development
experience



25 Best Tourism Board Websites in the World



Best in class
partners



Focus on
research

Destination  Analysts

DESTINATIONS INTERNATIONAL  miles



The CVB &
the Future of the
Meetings Industry
2018

Research conducted by Destination Analysts, Inc. for the destination marketing industry in partnership with Destinations International & Miles

Destination Analysts
The State of the American Traveler™
TRAVELER SEGMENTS EDITION
Summer 2018 | Volume 33



Destination  Analysts

Traveler Segments Edition

Research conducted by Destination Analysts, Inc. for the destination marketing industry in partnership with Destinations International & Miles

Destination Analysts
miles



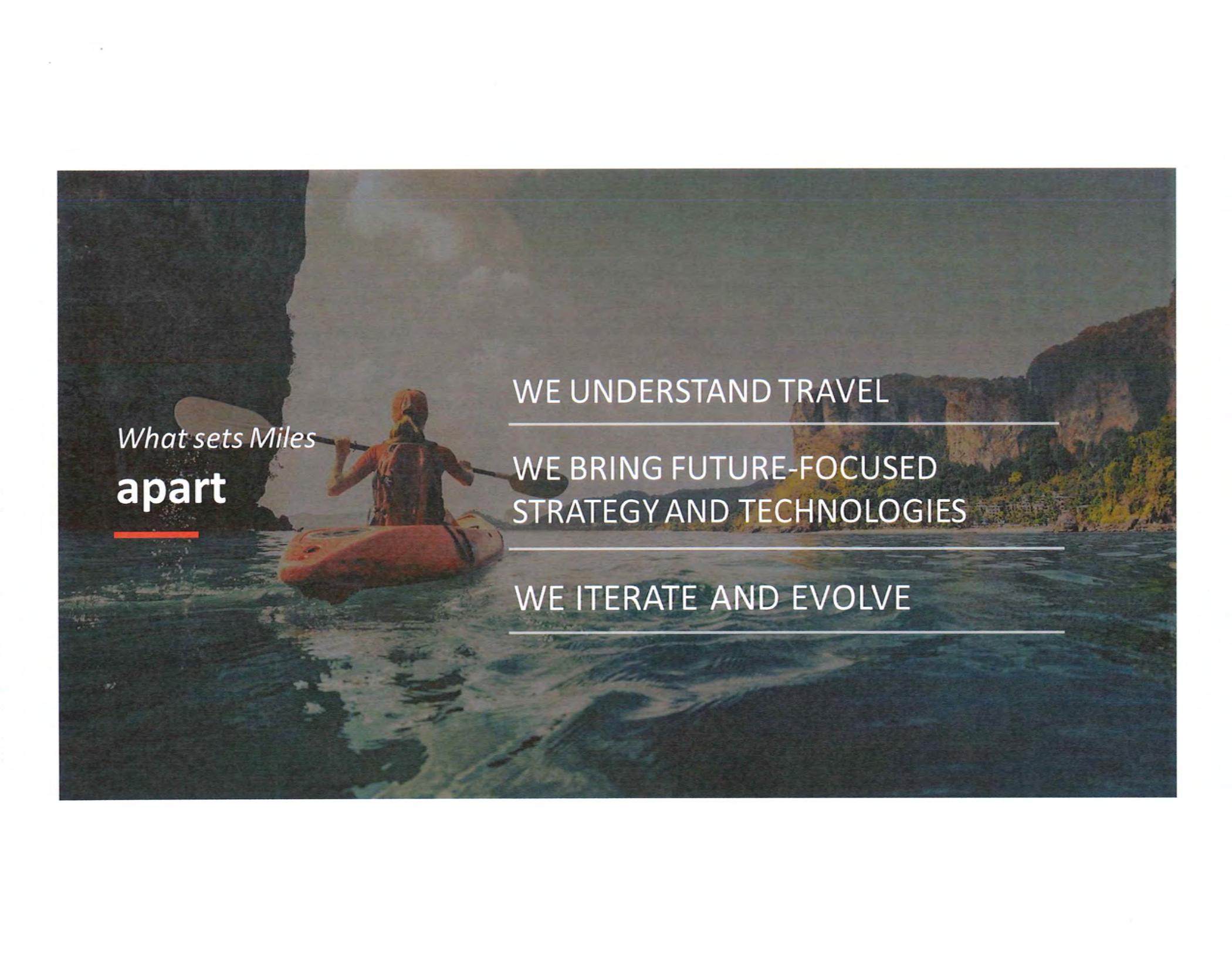
THE IMPACT OF
DMO WEBSITES

DMO Website
User & Conversion Study

EXECUTIVE SUMMARY OF FINDINGS

Research conducted for the DMA West Education & Research Foundation by Destination Analysts, Inc.

DMAwest
destination marketing association of the west
education & research foundation

A person in a red kayak is paddling down a river. In the background, a large waterfall cascades over a rocky cliff. The scene is captured in a cinematic style with soft lighting.

What sets Miles
apart

WE UNDERSTAND TRAVEL

WE BRING FUTURE-FOCUSED
STRATEGY AND TECHNOLOGIES

WE ITERATE AND EVOLVE

Working with
The Branson CVB



OUR WORK: **BRANSON CVB**

New Website

2014

- Organic Opp.
- Personalization
- Content Prod.
- Social Distro
- Web Reskin
- Web Maint.

2015

- Paid Search
- Content Strat.
- Email Marketing
- User Testing
- Analytics Dash.

2016

OUR WORK: **BRANSON CVB**

Digital Media

2017

2018

- Video Strategy
- Google DMO Program

2019

- Arrivalist Rep.
- Organic Audit
- Campaign Impl. "We Believe"

2020

OUR WORK: BRANSON CVB – EXPLOREBRANSON.COM

The screenshot displays the homepage of the Branson CVB website, explorebranson.com. The page features a prominent blue header with the 'BRANSON' logo on the left and navigation links for 'My Branson Vacation', 'Home', 'About', and 'Plan My Trip' on the right. Below the header is a main navigation bar with categories like 'About Branson', 'Things to Do', 'Where to Stay', and 'Groups, Reunions & Meetings'. A large hero image shows a performer on stage with the text 'ENTERTAINING ORIGINALS FOR MILES' and 'Plan your Entertaining Vacation'. The main content area is divided into several sections: 'It's All Smiles in Branson!' with a video player, 'Today in Branson' with a list of activities, 'Branson in Social Media', and 'Branson News' with recent updates.

BRANSON My Branson Vacation
Home About Newsletter Guide Maps Home About Plan My Trip

About Branson Things to Do Where to Stay Groups, Reunions & Meetings Search

ENTERTAINING ORIGINALS FOR MILES

Plan your Entertaining Vacation

It's All Smiles in Branson!

Whether you're celebrating family time together, escaping with that special someone or reconnecting with your closest friends, you are about to discover a destination that puts you center stage.

After all, there's no place that brings people together like Branson, Missouri.

Experience star-studded performances at our live shows. Explore the sights and sounds of one of the world's top 10 theme parks: Silver Dollar City. Discover the endless fun of our three pristine lakes and the majestic beauty of the Ozark Mountains. Learn about the rich history and culture of the area at our museums. Relax at the spas and resorts. Find that perfect gift at our hundreds of outlet stores, shops, galleries and boutiques.

The possibilities for a memorable vacation with those closest to you are truly limitless.

Celebrate an Ozark Mountain Christmas in Branson

0:00 / 1:21

Today in Branson

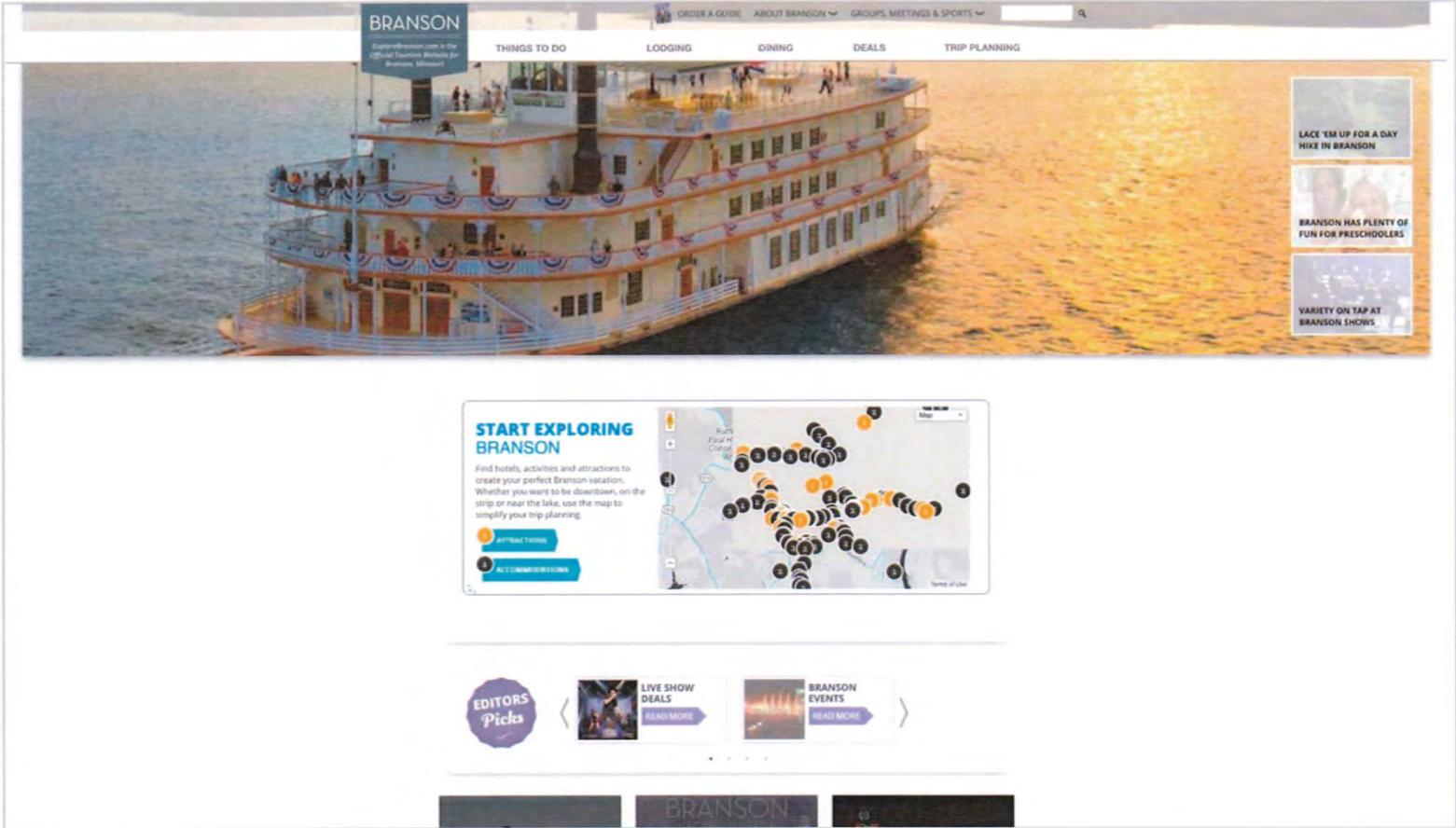
- Early Shows 18
- Evening Shows 22
- Attractions 13
- Festivals and Events 8

Branson in Social Media

Branson News

- Tanger Outlets Branson Welcomes Exciting New Stores
- Westgate Branson Woods Resort Hosts First Annual Spirit of Branson Tree Lighting

OUR WORK: BRANSON CVB



OUR WORK: BRANSON CVB

Branson
LIVE SHOWS | CHRISTMAS | ORDER A GUIDE | SIGN UP FOR OUR NEWSLETTER | Search

THINGS TO DO | LODGING | DINING | DEALS | TRIP PLANNING | BLOG | MY TRIP

We Believe IN LEGENDARY FAMILY ENTERTAINMENT.

SEE THE HAYGOODS LIVE

TRIP Ideas

Branson Festivals: Fun for Every Season
Holidays aren't the only occasions for celebrating in Branson. Check out these festivals happen...

READ MORE

5 Ways to Spring Break in Branson
Spring Break is just around the corner, that means it's time to create your family's dream spr...

READ MORE

Branson Bucket List: Must-Do Activities
The most difficult part of vacationing can sometimes be choosing what to experience. Don't be...

READ MORE

SEE ALL TRIP IDEAS >

OUR WORK: BRANSON CVB – ANALYTICS

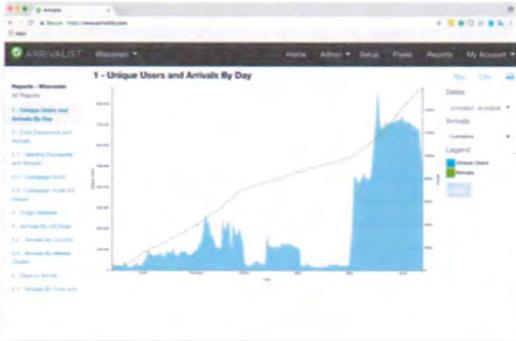
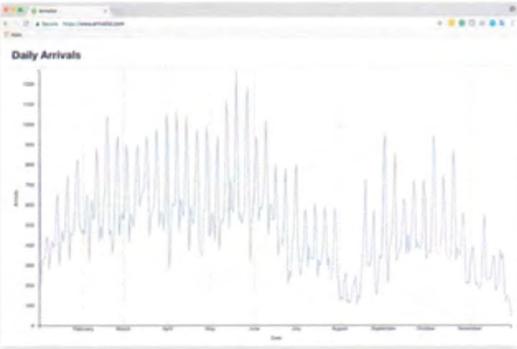
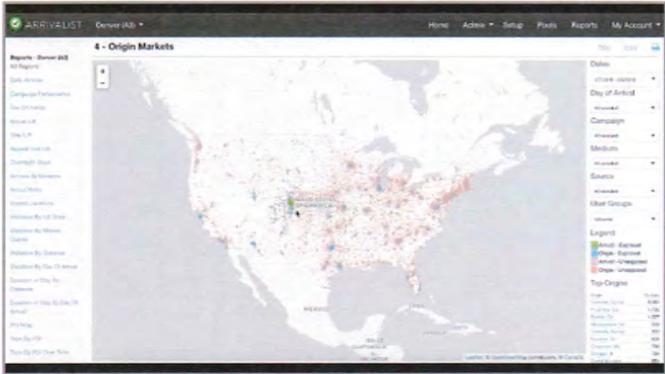
2016



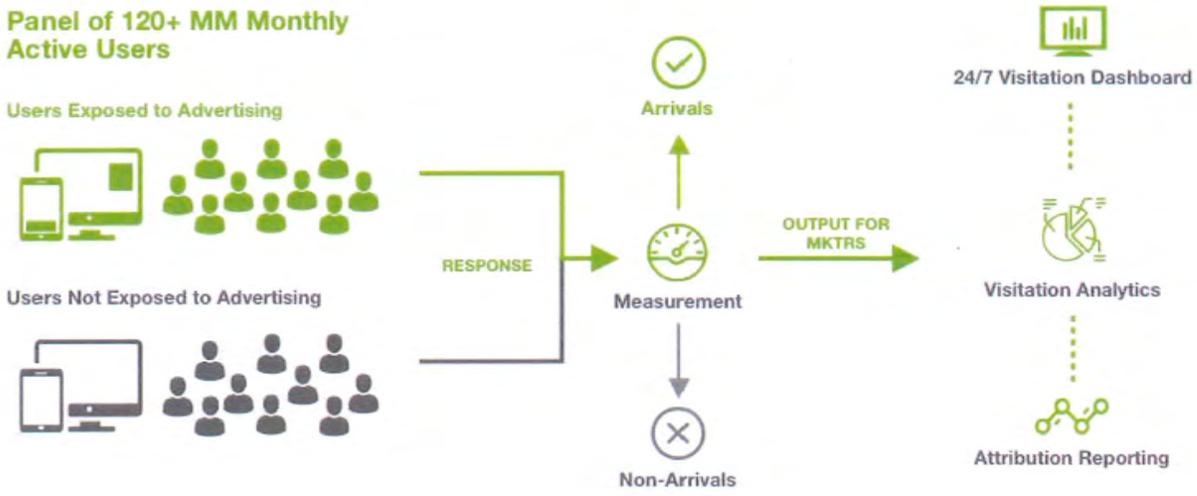
2020



OUR WORK: BRANSON CVB – ARRIVALIST



OUR WORK: BRANSON CVB – ARRIVALIST



OUR WORK: BRANSON CVB – ARRIVALIST

Source	Medium	Campaign	Content	Exposures	Arrivals	Arrivals Per 1000 Exposures
Explore Branson	Site Visit	Run of Site	NA	4,374,152	6,961	1.59
	Page Visit	Blog	NA	515,792	1,272	2.47
		Things to Do	NA	502,390	1,874	3.73
		Shows	NA	406,818	478	1.17
		Homepage	NA	402,364	1,346	3.35
		Attractions	NA	386,147	443	1.15
		Vacation Guide	NA	205,802	439	2.13
		Calendar	NA	145,800	372	2.55
		Lodging	NA	136,190	119	0.87
		Deals	NA	118,014	141	1.19

Source	Medium	Campaign	Content	Exposures	Arrivals	Arrivals Per 1000 Exposures
Diglant	Display	FY 19	NA	13,291,421	3,154	0.24
	Video	FY 19	NA	3,506,083	1,210	0.35
	Native	FY 19	NA	3,127,427	1,200	0.38
Sejern	Display	Branson FY19 Frontier	NA	7,435,940	673	0.09
	TripAdvisor	Display	FY 19	NA	3,348,955	6,170
TripAdvisor	Display Native	Branson FY20	Destination Sponsorsh	379,599	0	0
			Retargeting	157,308	15	0.10
			Branson	130,505	26	0.20
			Competitive Destination	129,136	1	0.01
			Missouri	127,882	17	0.13
			Geotargeting	126,936	24	0.19
			Nativo	Native	FY 19	NA
Branson FY20	NA	1,046,664			18	0.02
Expedia	Display	FY 19	NA	884,888	454	0.51
Centro	Display Native	Branson FY20	NA	614,621	48	0.08
	Video Pre-Roll	Branson FY20	NA	207,043	15	0.07
GumGum	Rich-Media	Branson FY20	NA	478,174	2	0.00
Matador	Native	FY 19	NA	399,220	169	0.42
Hulu	CTV	Branson FY20	NA	17,003	0	0



OUR WORK: BRANSON CVB – WHAT'S NEXT?

2020

- Connected TV
- Drupal 8 Upgrade
- Contextual AI





Q&A

miles
PARTNERSHIP

milespartnership.com

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H2R Market Research

Reveal Your Customer's Full Experience



2019 Marketing & Media Effectiveness Research

Delivered January 2020

H2R Market Research

- *Helping 2 Reveal insights that amplify the voice of the visitor.*
 - 35 years of **research experience** including Bass Pro Shops, Acxiom, Herschend Family Entertainment & H2R Market Research.
 - Specialize in **Destinations, Attractions & Hospitality** research.
 - **Work with hundreds of destinations**, states, attractions and other tourism-related businesses.
 - Originated as HFE Business Unit but have been **separate standalone research consultancy since 2011**.
 - Serve clients across North America, from **New England** to **Southern California**, and from both **Alaska & Seattle** to the **Florida Keys** and several islands in the Caribbean.
 - Vast majority of our clients are **DMOs, STOs and attractions**.
 - **International Travel & Tourism Association** J. Desmond Slattery Award winner.
- **Experience with marketing & media effectiveness** spans more than a decade
 - Conversion Studies, 1999-2010
 - Pre & Post Ad Awareness, 2005-2008
 - Marketing & Media Effectiveness, 2007-Present

Travel research is all we do, and we are blessed to work with hundreds of best-of-class clients and business partners.

TRAVEL & TOURISM



ATTRACTIONS



QUALITY OF LIFE



BUSINESS PARTNERS



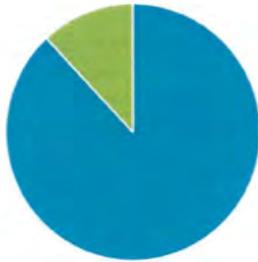
H2R conducts marketing performance studies for 91% of Missouri DMOs required to conduct them, and we do a variety of other research for those DMOs who do not.

Kansas City
Branson
Springfield
Table Rock Lake
Tri-County Lodging Assn
St. Joseph
Cape Girardeau
Columbia
Jefferson City
Saint Charles

Sikeston
Independence
Joplin
Carthage
Lebanon
Hannibal
Kirksville
Pulaski County
Pike County
Maryland Heights



LANDSCAPE



Incremental

Quantifies how much of Branson's travel & tourism revenue would not have occurred had the CVB's marketing campaign not been in place.



DI Inspired

A panel of travel professionals representing practitioners and academics defined and published the accepted norms for measuring ad effectiveness in 2006-2007 for DMAI.



Industry Admired

The methodology was quickly adopted by State Travel Offices and Destination Marketing Offices across the country, and quickly became the industry's best practice.



MDT Required

The Missouri Department of Tourism uses this methodology to quantify their marketing performance and they require it be used in all DMO studies in exchange for receiving co-op funds.

Overview

EXECUTIVE SUMMARY

1 MARKETING EFFICIENCY

2 INCREMENTAL IMPACT

3 MARKETING EVALUATION

4 BRANSON TRAVELER PROFILE

CVB Purpose. To drive visitation that grows the entire Branson economy.

Objective of Study: To measure the incremental impact Branson's marketing campaign had upon visitation and travel spending and to evaluate the performance of the 2019 marketing campaign.

Target Audience. The Branson Marketing & Media Effectiveness study was conducted among nationwide leisure travelers disaggregated across three tiers—Tier 1=51-300 miles, Tier 2=301-650 miles and Tier 3=651+ miles of Branson. The research was conducted in December 2019 to provide an accurate and contextual measurement of the marketing ROI.

Sample. A total of 1,700 respondents were interviewed – including 500n within 51-300 miles, 500n within 301-650 miles and 700n within 651+ miles. Overall, this sample size provides for a maximum margin of error of +/-2.4% at a 95% confidence interval.

Branson Measures KPIs Across all Industry Standard Categories

1. Sales Tax Receipts
2. Marketing Effectiveness
3. Marketing Efficiency
4. Post-Ad Exposure Lift
5. STR Hotel Performance
6. Visitation Projections
7. Online Engagement
8. Brand Health
9. Guest Satisfaction
10. Other Relevant Metrics

Sales Tax/Bed Tax	Effectiveness (Incr Trips)	Effectiveness (ROI)	Efficiency (% Ad Awareness)
Effectiveness (Incr Revenue)	Efficiency (Market Reach)	Efficiency (Cost per Aware HH)	Post Ad Exposure Intent/Lift
STR (Room Demand)	STR (Occupancy)	STR (Room Revenue)	Brand Health (Aided Aware)
Visitation Projections	Engagement (Impressions)	Engagement (Leads)	Engagement (Efficiency)
Engagement (Website Visits)	Engagement (Social Media)	Engagement (Articles Read)	Brand Health (Market Intent)
Brand Health (Conversion)	Brand Health (Retention)	Brand Health (Potential)	Brand Health (Opinion)
Visitor (Intent to Return)	Visitor (Net Promoter Score)	Visitor (% Groups)	Visitor (% Air Travel)
Visitor Spending/Party	Visitor 1 st vs Repeat	Visitor (NPS)	Other (Air Passengers)
Other (AirDNA)	Other (Arrivalist)	Other (Water Usage)	Other (PR Equivalency)
Other (# of Conventions)	Other (# of Sports Events)	Other (Mkt Hook Evaluation)	Other (Traffic Counts)

Methodology

CONSUMER PANEL



Marketing & Media Effectiveness Studies require the use of a **Gen Pop Consumer panel** to reach all residents in the appropriate advertised markets. These panels are professionally managed and rebalanced to reflect the demographics of consumers.

QUESTIONNAIRE SCREENER



Once consumers are randomly contacted, they are screened to ensure that only **leisure travelers and decision makers** complete the survey. This means that the study represents all travelers in destination's advertised markets

- Competitive Set
- Level of Visitation

AD AWARENESS & EFFICIENCY



Ad awareness is measured by showing online respondents' specific examples of ads and recording whether they've previously seen it or not. This enables the categorization of **aware (experimental) and unaware (control) profiles**.

- % Aware
- Market Reach
- Cost/Aware HH

IMPACT & EFFECTIVENESS



Incremental level of visitation calculated between Awares & Unawares and weighted across market reach to calculate incremental visits to destination.

- Increment
- Incremental Trips
- Incremental Spending
 - ROI

Branson 2019 Marketing & Media Effectiveness Research

Marketing Efficiency



Marketing Efficiency

KEY PERFORMANCE INDICATORS



41%
of travelers have
seen/heard a Branson
advertisement



35.9M
traveler households
were reached by
Branson's advertising



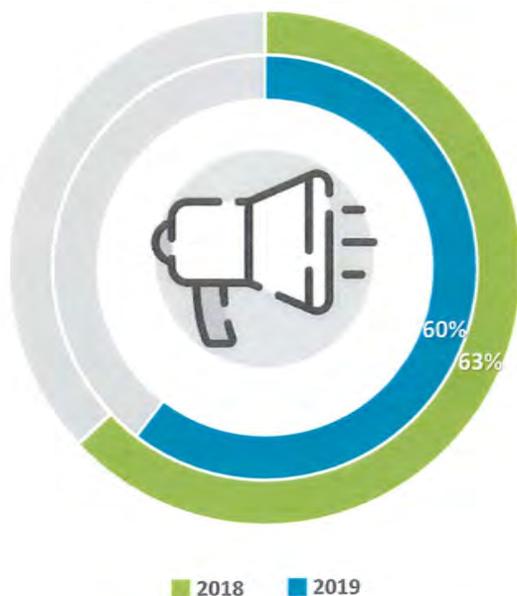
\$5.4M
spent on advertising in
the target markets



\$0.15
spent to reach each
aware travel household
in the target markets

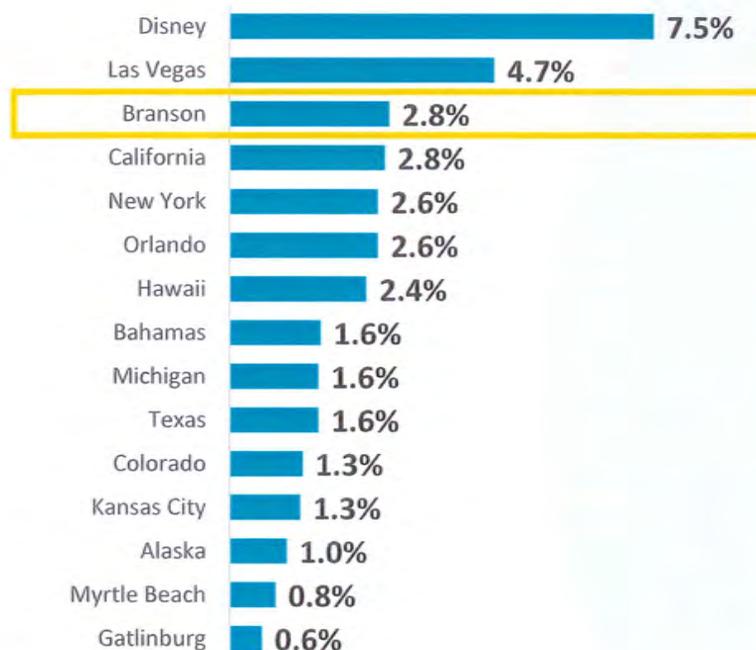
Six in ten travelers recall seeing travel ads over the past six months, a bit less than last year. However, Branson now ranks in the top three destinations they've seen ads for—up two places from last year.

Seen/Heard ANY Travel Ads in Past Six Months



RESPONDENT BASE: ALL RESPONDENTS | N=1,700

Unaided Destination Advertising Recall



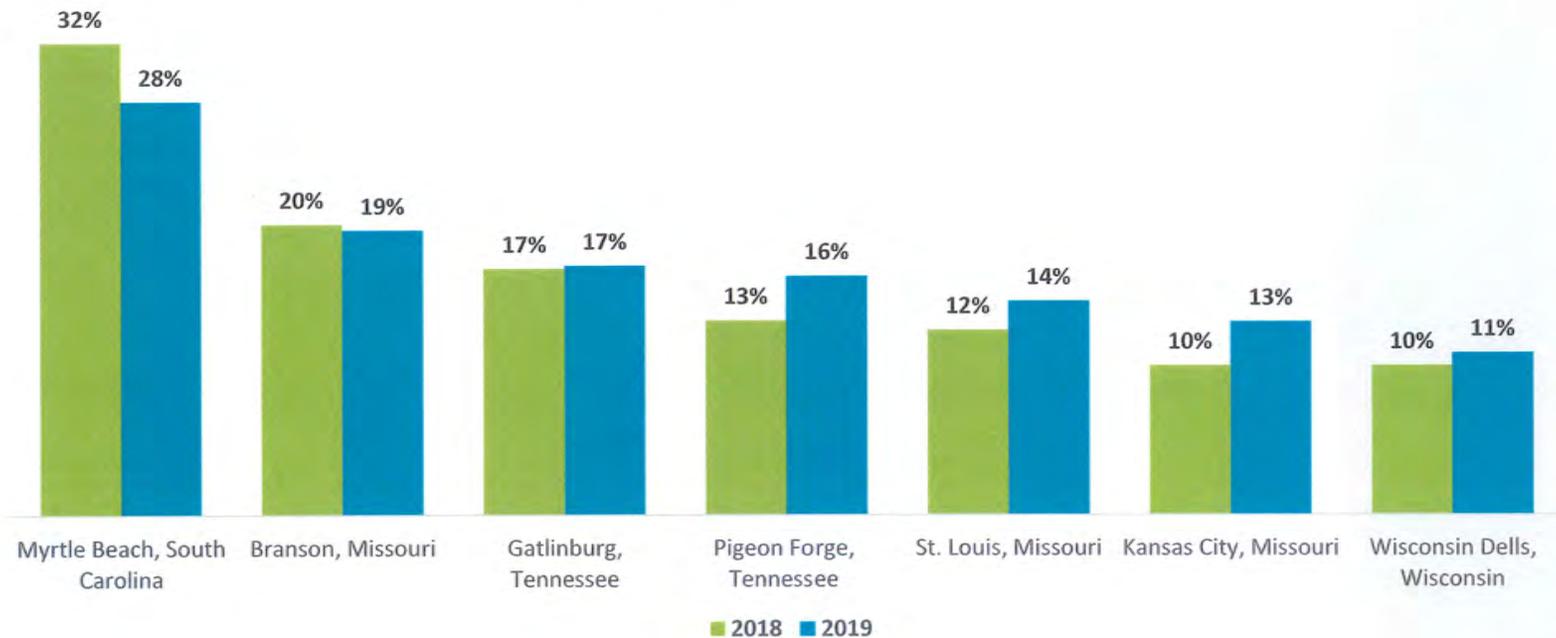
RESPONDENT BASE: RECALL SEEING /HEARING TRAVEL ADVERTISEMENTS | N=1,027

Q9: Have you seen or heard any destination travel advertisements anywhere in the past 6 months?

Q10: Which destinations do you recall hearing/seeing travel advertisements for?

Branson continues to rank second in assisted advertising awareness—on par with last year. While Myrtle Beach still ranks first, its level of assisted ad awareness declined significantly this year.

Assisted Advertising Awareness*

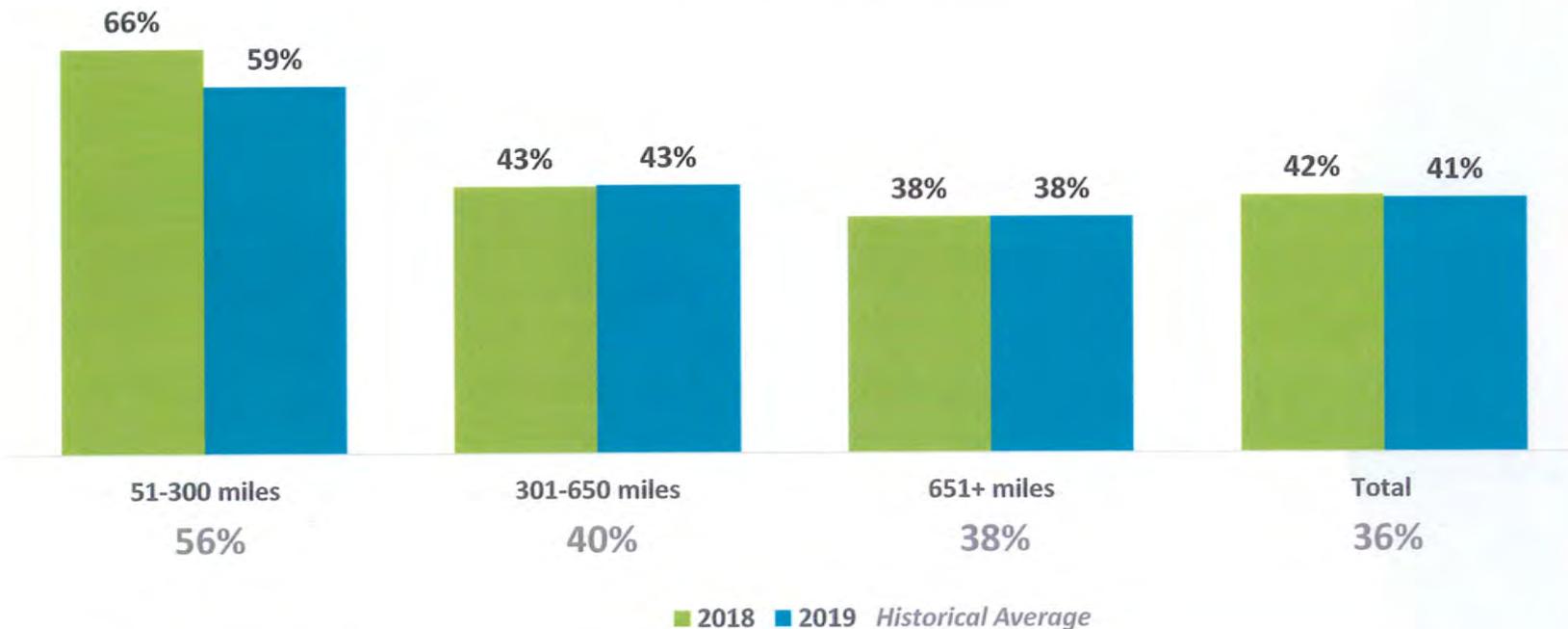


Q11: Have you seen or heard travel advertisements in the past 6 months for any of the following destinations?

*Assisted advertising awareness lists destinations, but no creative images/videos.

Overall ad awareness was on par with last year and remains well above the Historical Average. Tier 1 saw a decline after posting a large increase last year but is still well above its Historical Average of 56%.

Marketing Awareness



Q30: Have you seen or heard any news stories about Branson this year?
 Q33-39: Have you seen this advertisement, or one similar, in the past 12 months?

Market Reach (Aware Traveler Households)

BCVB's market reach totaled nearly 36M households across the U.S. this year. This represents a 3% increase over last year and is 16% higher than the Historical Average.

All three tiers were on par with or higher than their Historical Averages for market reach. Tiers 2 and 3 also saw increases over last year, fueling the overall increase in market reach.

Market Reach	2018 Market Reach	2019 Market Reach	BCVB Historical Average
51-300 miles	3.6M	3.3M	3.2M
301-650 miles	11.5M	12.0M	11.3M
651+ miles	19.8M	20.6M	20.2M
Total Market	34.9M	35.9M	31.0M

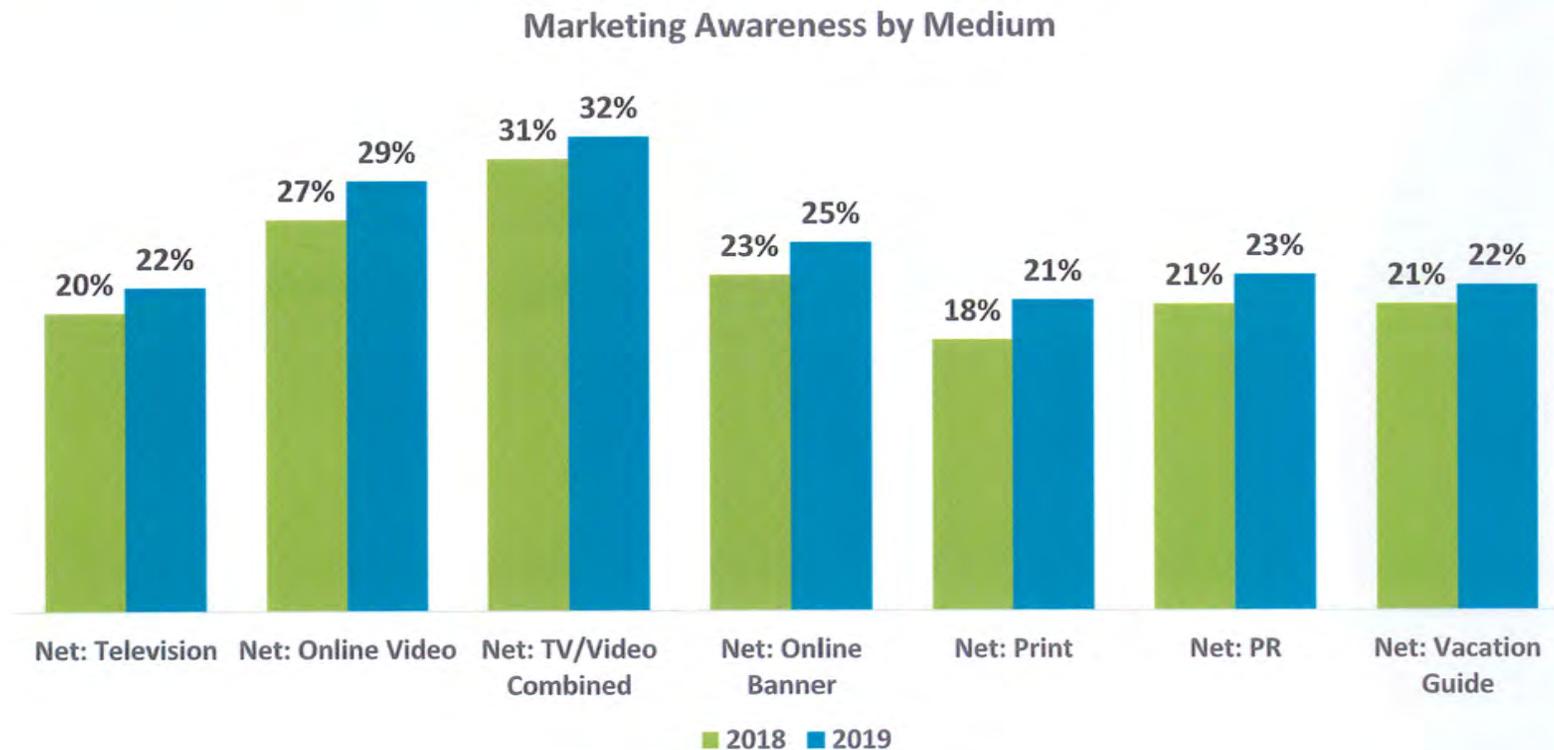
Marketing Efficiency (Cost per Aware Travel Household)

The total marketing investment averaged \$0.15 per aware traveler household—in line with the Historical Average.

The Outer Market continues to be the most efficient market thanks to the large population of travel households it represents. Closer markets tend to cost slightly more relative to the number of aware travel households it provides. All three markets were as efficient, or better than, Branson’s Historical Averages.

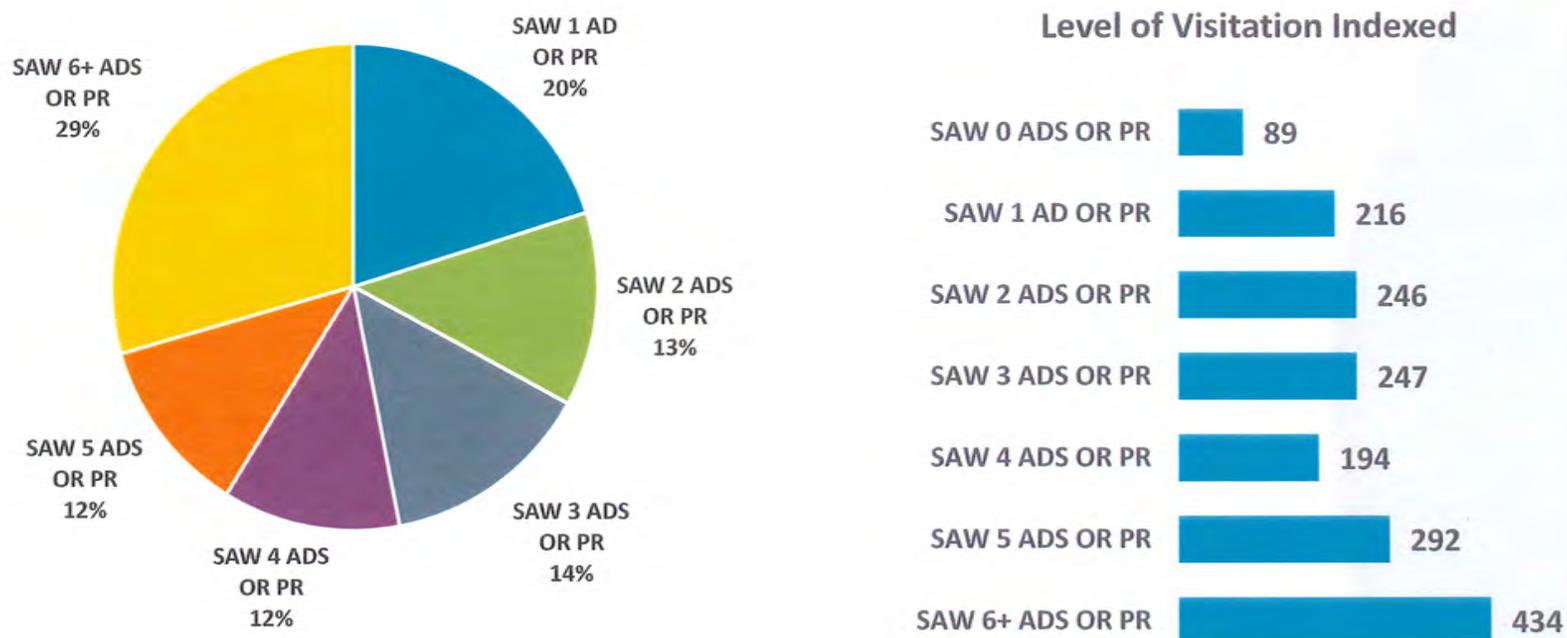
Marketing Efficiency	2018 Cost/HH	2019 Cost/HH	BCVB Historical Average
51-300 miles	\$0.36	\$0.39	\$0.44
301-650 miles	\$0.14	\$0.14	\$0.15
651+ miles	\$0.12	\$0.12	\$0.11
Total Market	\$0.15	\$0.15	\$0.16

Awareness of individual marketing channels increased across the board, with the combination of television and online videos generating the largest amount of ad awareness for Branson.



Q30: Have you seen or heard any news stories about Branson this year?
Q33-39: Have you seen this advertisement, or one similar, in the past 12 months?

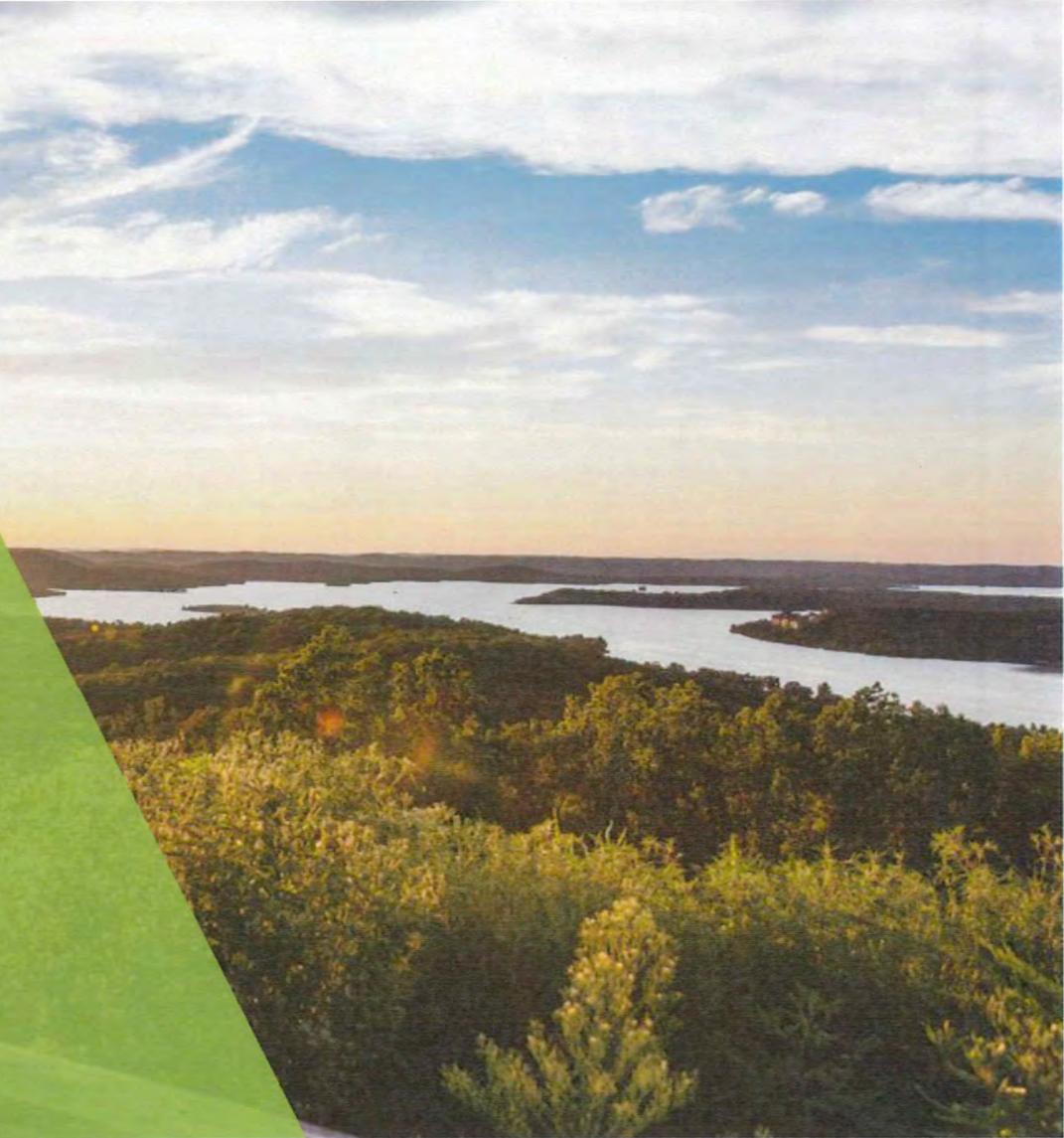
Increased ad exposure delivers more visits. The more Branson ad exposures travelers recalled, the more likely they were to have visited in 2019.



Q30: Have you seen or heard any news stories about Branson this year?
 Q33-39: Have you seen this advertisement, or one similar, in the past 12 months?

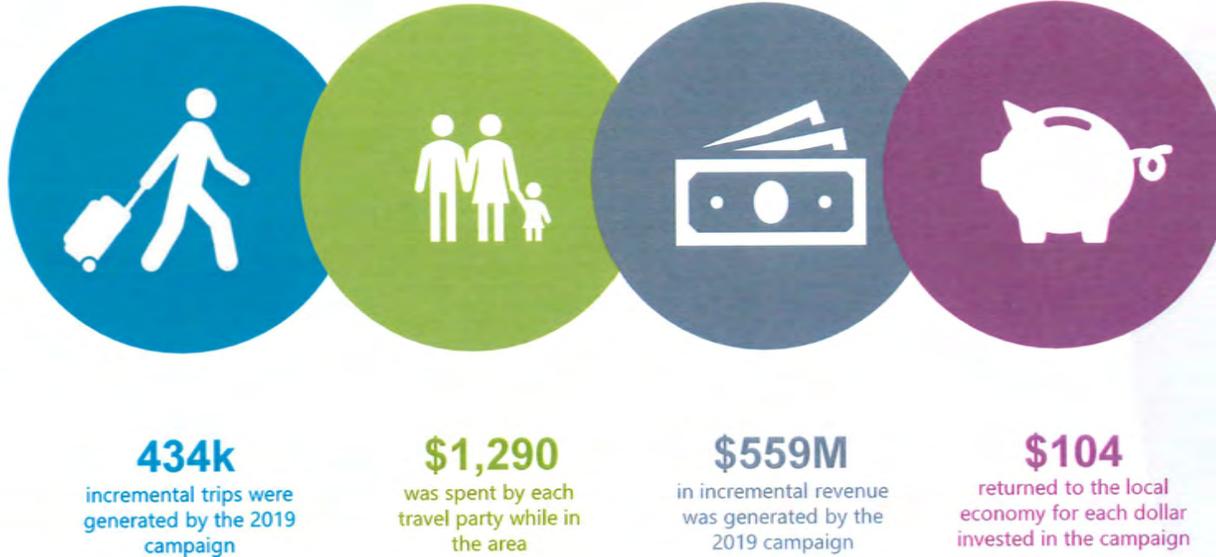
Branson 2019 Marketing & Media Effectiveness Research

Incremental Impact



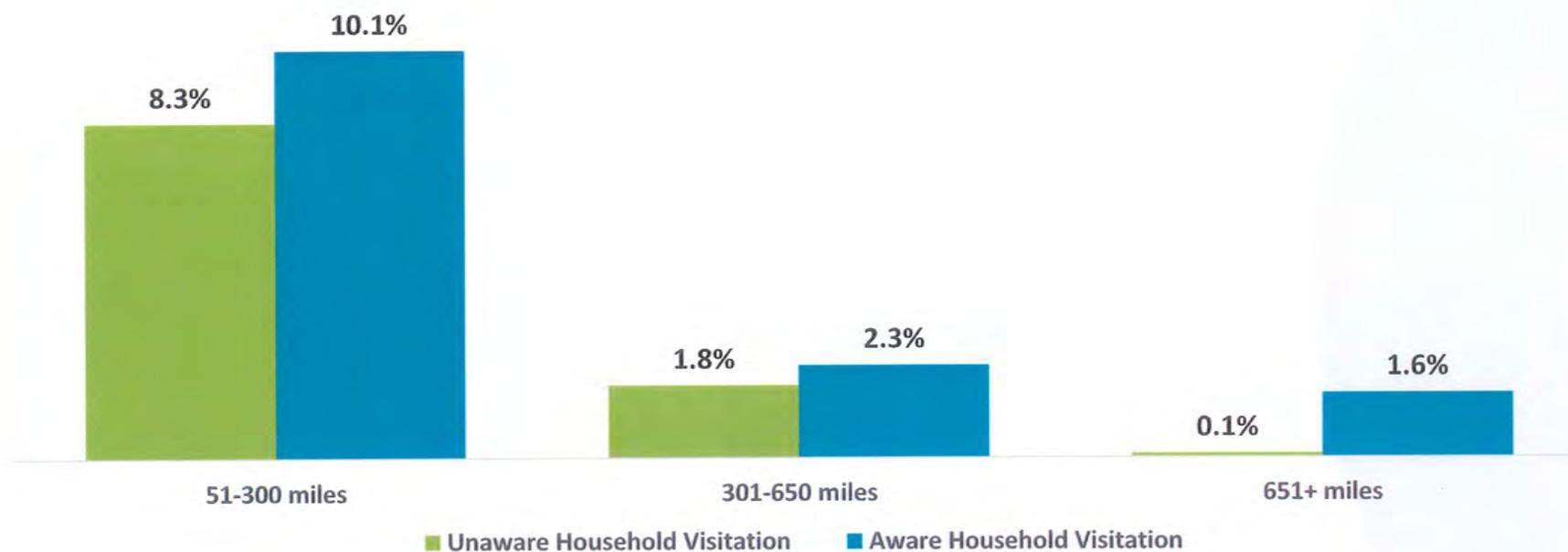
Incremental Impact

KEY PERFORMANCE INDICATORS



Travelers reached by BCVB's marketing messages in all three market tiers were more likely to visit Branson than those who did not recall seeing/hearing any of the marketing messages.

Visitation – Aware vs. Unaware Households



Q17: Have you visited Branson, MO in the past 12 months?

Incremental Travel

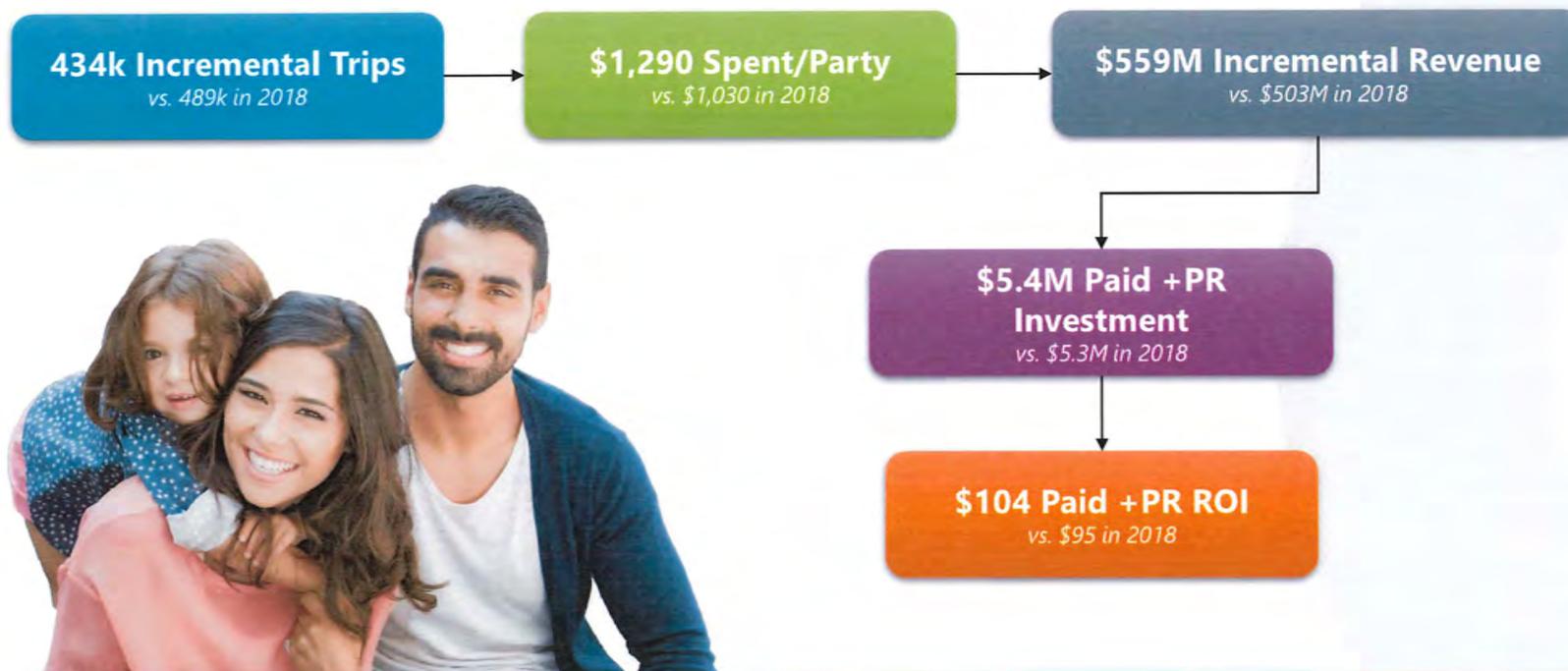
Incremental travel provided a lift of 1.2 points, slightly lower than last year and the Historical Average. This increment fueled 434k incremental trips—lower than last year but still much higher than the Historical Average.

Incremental trips from the secondary market (301-650 miles) has continued to decline and is well below it's Historical Average. This coupled with a decline from the core market (51-300 miles) cause the downward shift this year. However, Tier 3 saw an increase and remains well above the Historical Average.

Incremental Travel	2018 Increment	2019 Increment	BCVB Historical Average
51-300 miles	+3.0%	+1.8%	+2.0%
301-650 miles	+0.6%	+0.5%	+1.3%
651+ miles	+1.6%	+1.5%	+1.2%
Total Market	+1.4%	+1.2%	+1.4%

Incremental HH Trips	2018 Incremental Trips	2019 Incremental Trips	BCVB Historical Average
51-300 miles	107.9k	61.5k	63.4k
301-650 miles	73.6k	60.4k	147.7k
651+ miles	307.5k	311.8k	232.5k
Total Market	489.0k	433.7k	407.9k

Branson's marketing campaign generated incremental revenue of nearly \$559M and an ROI of \$104—both records for BCVB.



Incremental Travel Spending

Incremental travel spending reached more than \$559M this year, breaking last year's record high of \$504M.

The increase in incremental revenue was driven solely by a 30% increase from Tier 3 visitors. Tier 1 visitors had a significantly less incremental impact than last year (but still in line with its Historical Average). Tier two also saw a decline and remains well below the Historical Average.

Incremental Travel Spending	2018 Spending	2019 Spending	BCVB Historical Average
51-300 miles	\$93.2M	\$53.7M	\$52.7M
301-650 miles	\$76.3M	\$71.8M	\$145.1M
651+ miles	\$334.3M	\$433.9M	\$228.8M
Total Market	\$503.8M	\$559.4M	\$393.9M

Return on Investment

BCVB's 2019 marketing campaign generated an ROI of \$104, an increase for the second straight year and a record for the area.

Those living beyond 650 miles from Branson experienced significantly better performance this year than the other tiers due in part to both smaller market reach and visitation increment.

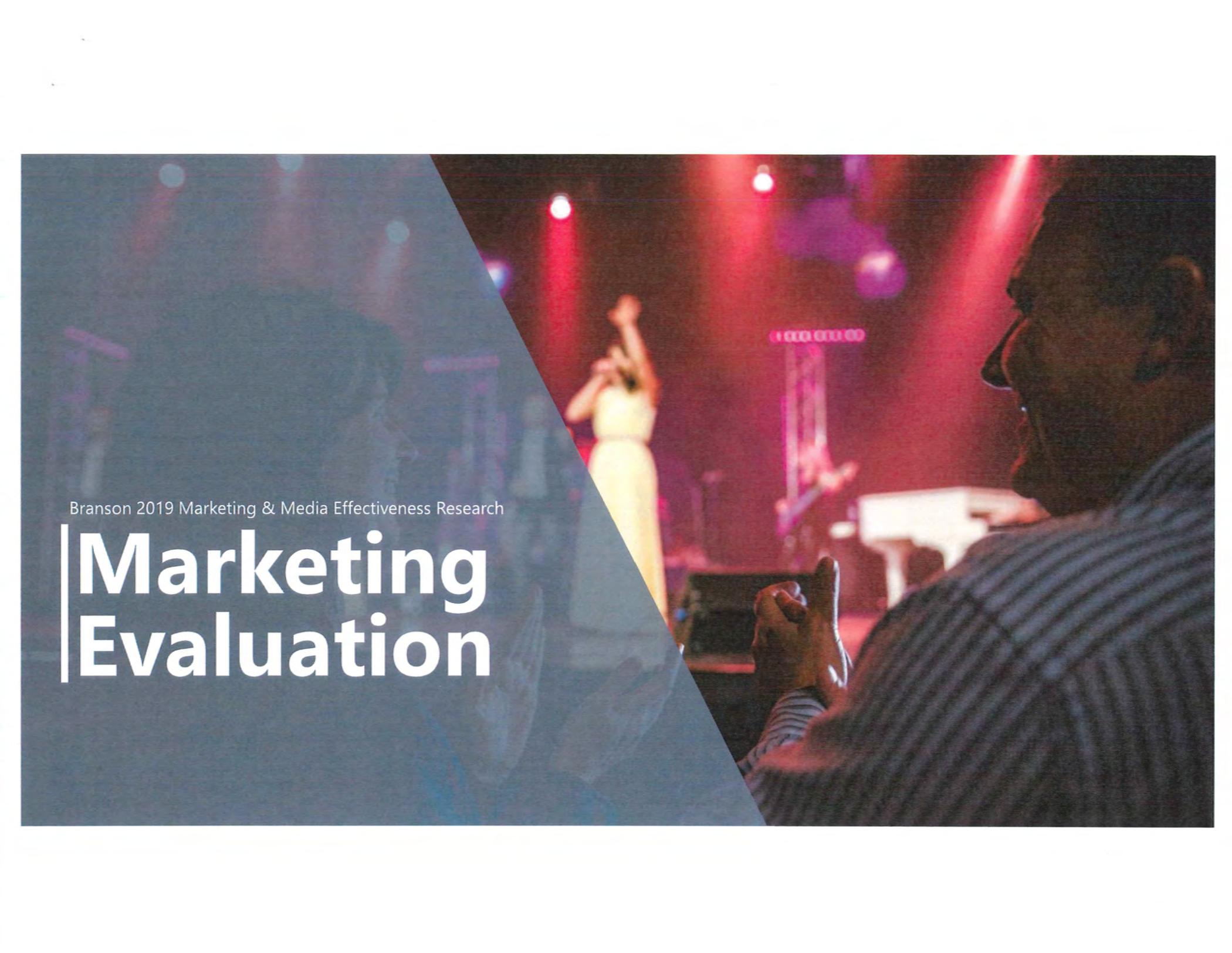
Return on Investment	2018 ROI	2019 ROI	BCVB Historical Average
51-300 miles	\$72	\$41	\$40
301-650 miles	\$47	\$43	\$92
651+ miles	\$142	\$179	\$115
Total Market	\$95	\$104	\$83

Incremental Room Nights



The 2019 campaign generated more than 1.8M incremental *room nights* (that would not have occurred otherwise) from those staying overnight at a Hotel, Motel, Bed & Breakfast, Condo, Cabin, Cottage or Resort in the Branson area.

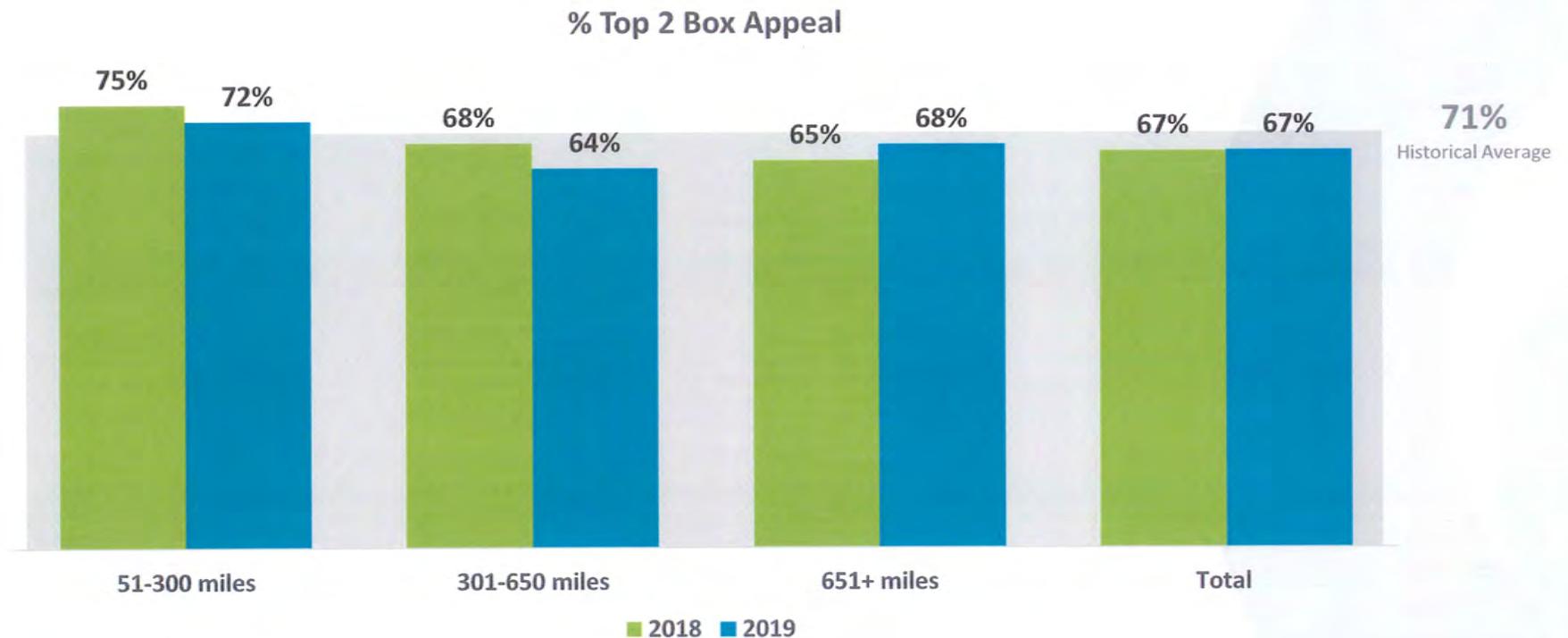
Extrapolated across the number of rooms purchased and length of stay, it is estimated that the 2019 campaign generated approximately 29% of the total room nights utilized by travelers in the Branson area during this timeframe.



Branson 2019 Marketing & Media Effectiveness Research

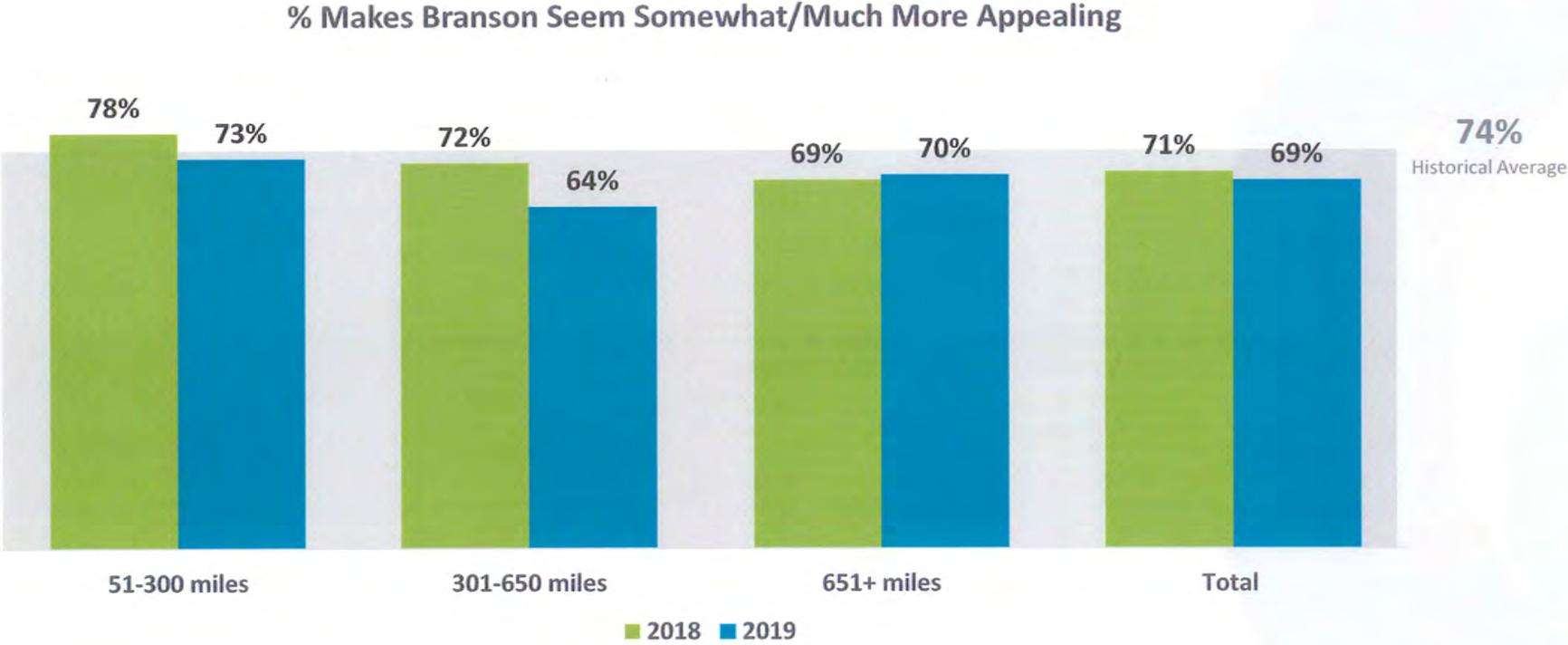
Marketing Evaluation

Two-thirds of travelers found Branson's advertising appealing, similar to last year. Although, travelers coming from further distances posted an increase.



Q39: Using the scale provided, please rate how much you like this collection of advertisements for Branson.

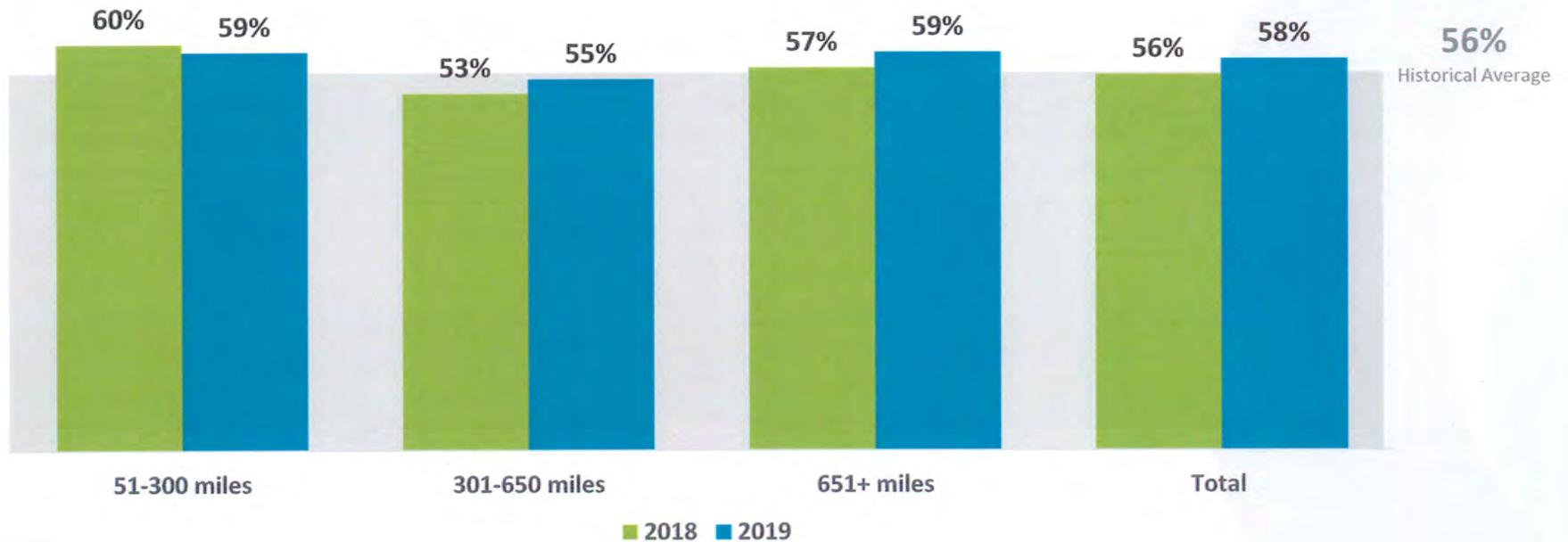
The advertising collection's ability to make Branson seem somewhat/much more appealing declined for the third year in a row.



Q40: Using the scale provided, please indicate the degree to which these ads make Branson seem more appealing to you.

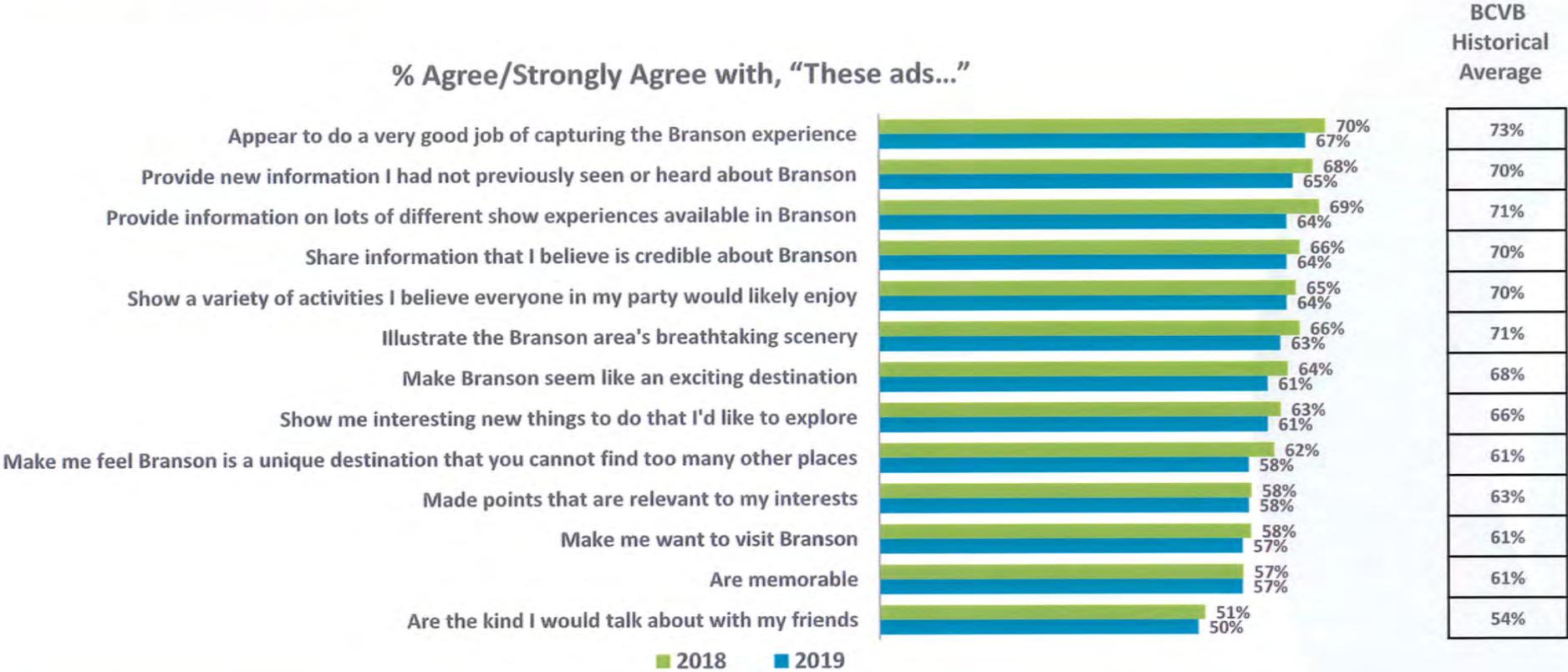
An increasing number of travelers feel that Branson’s advertisements are different from others they have seen—topping the Historical Average by two points.

% Ads Are Pretty/Much Different From Other Destination Advertising



Q41: Using the scale provided, please indicate how different these advertisements are from other advertising you've seen for destinations.

Marketing takeaways did not resonate quite as strongly this year as they have in the past.



Q42: Based upon the message you took away from the advertisements you just reviewed, please indicate the degree to which you agree that these ads...

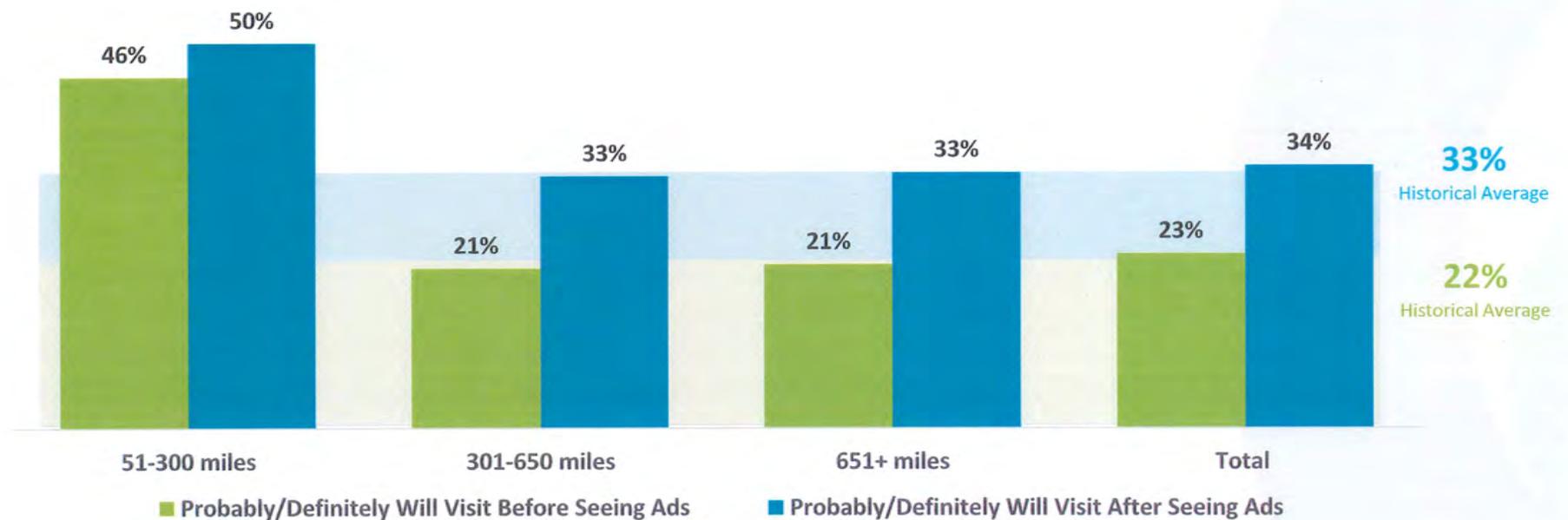
After reviewing the ads, travelers indicated they were less likely to read travel reviews from recent Branson visitors than last year, but significantly more likely to call the travel bureau for information.



Q43: Using the scale provided, please indicate how likely you are to take the following actions after seeing these advertisements for Branson.

Post-ad exposure lift in intent to visit Branson averaged +11 points—in line with the Historical Average and four points higher than H2R's Norm.

% Probably/Definitely Will Visit Branson in the Next 12 Months



Q16: Using the scale provided, please indicate how likely you are to visit each of the following destinations in the next 12 months.

Q44: Using the scale provided, please indicate how likely you are to visit Branson in the next 12 months:

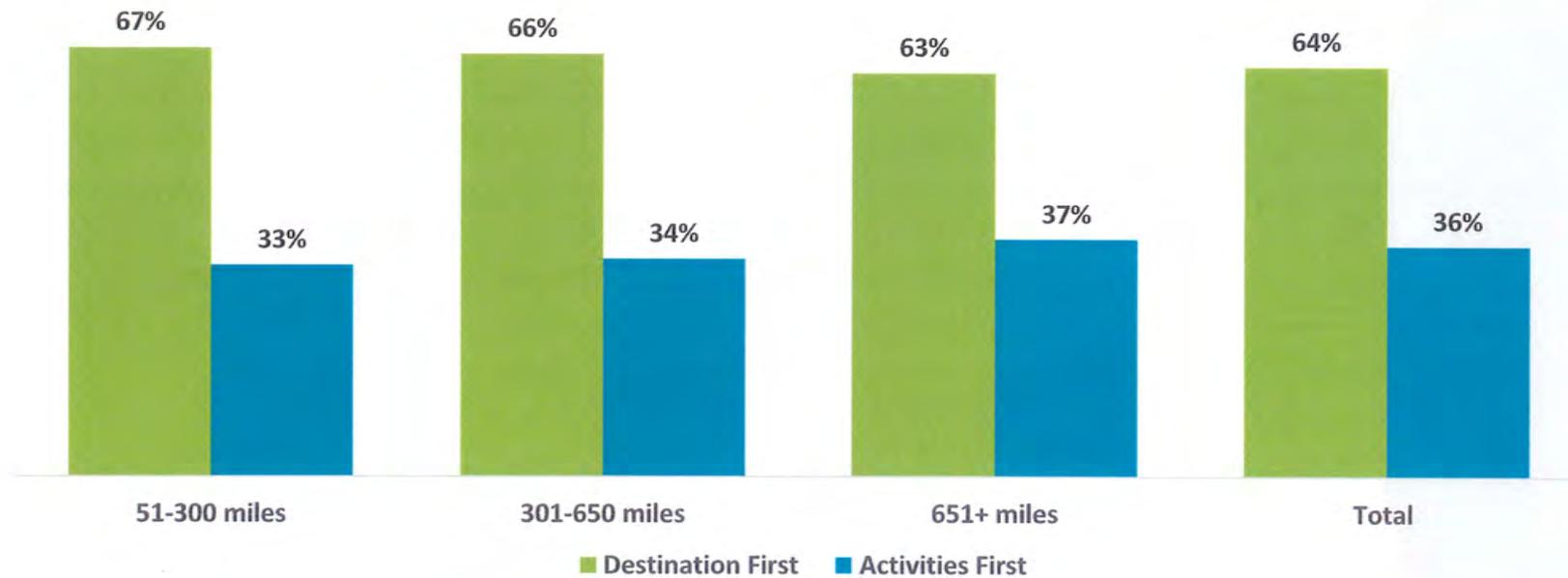
Branson 2019 Marketing & Media Effectiveness Research

Branson Traveler Profile



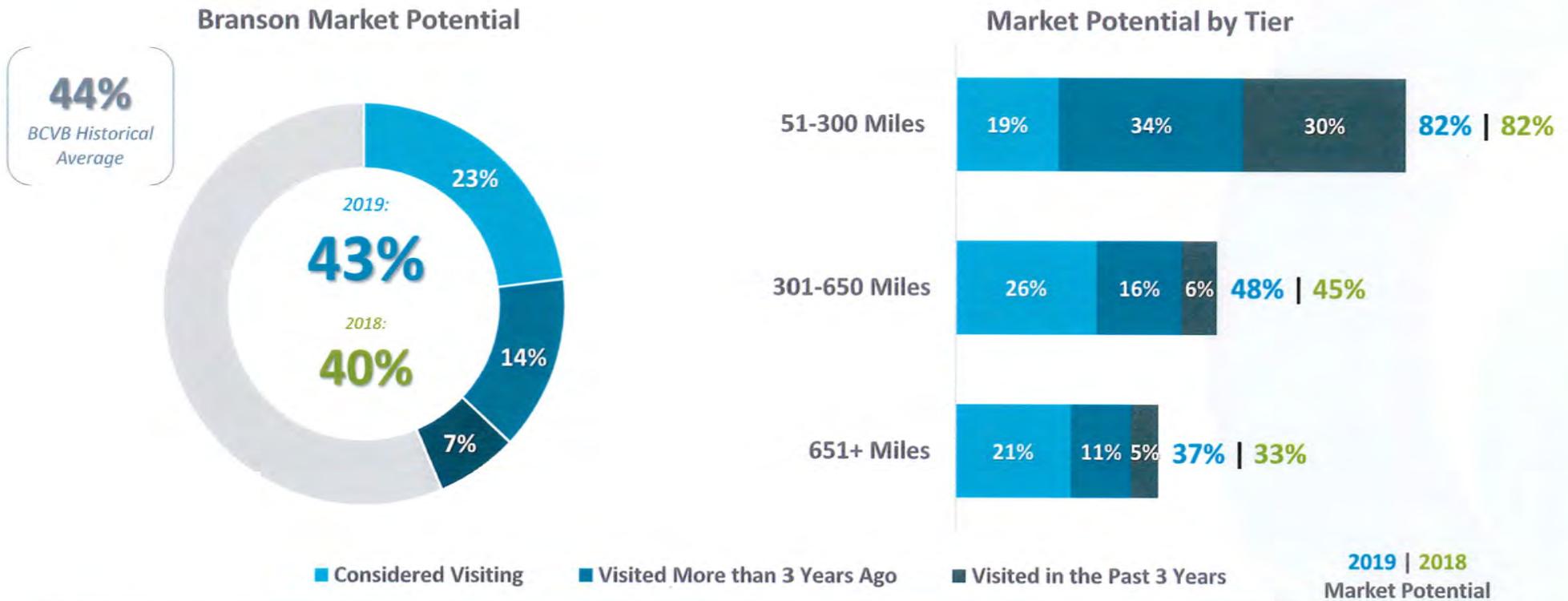
Across the nation, travelers are much more likely to say they choose the destination they want to visit first, as opposed to choosing the activities they would like to take part in.

Decisions Made First When Planning Leisure Travel



Q7: When visiting or planning a visit to a leisure destination, which of the following decisions are you most likely to make first?

Market Potential (the combination of recent visitors, lapsed visitors and considerers) includes 43% of travelers nationwide and increased among the Outer Markets.



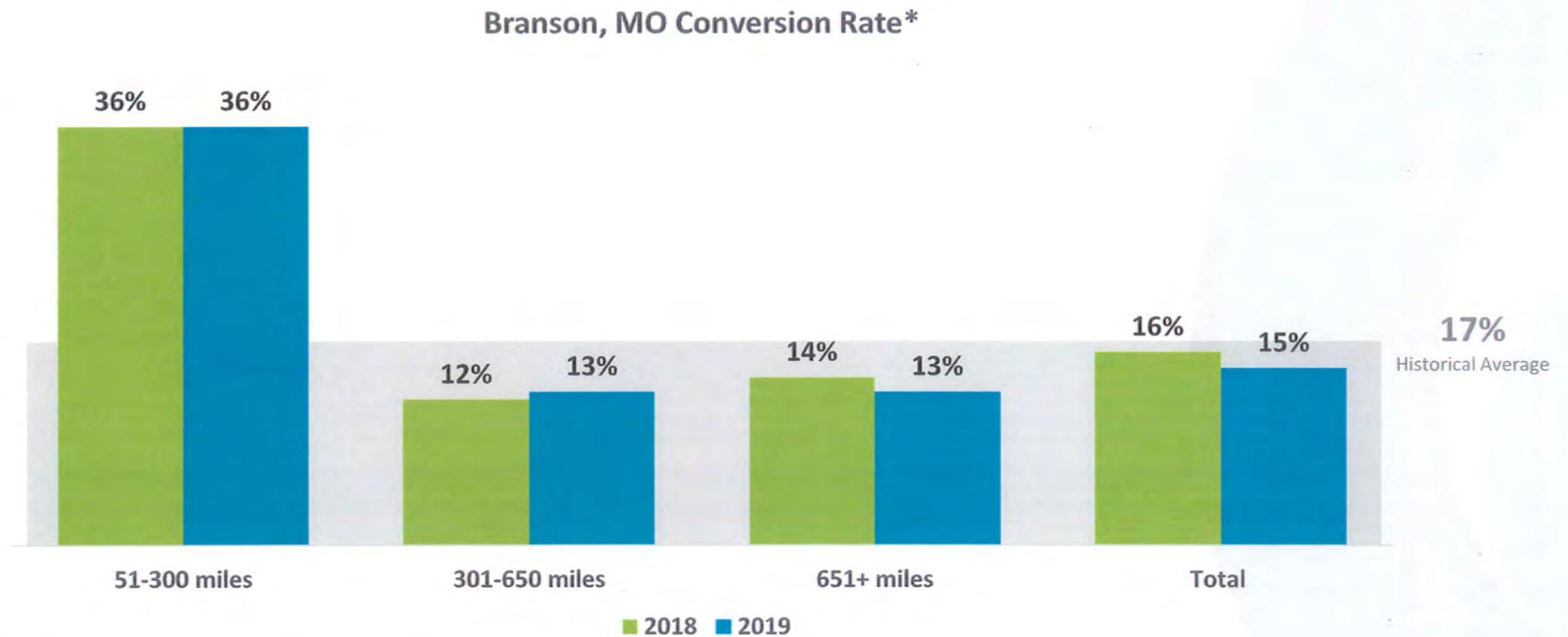
Q11: Please indicate your awareness and prior visitation of the following destinations:

Among the competitive set, Myrtle Beach and St. Louis continue to have the highest levels of gross Market Potential.



Q11: Please indicate your awareness and prior visitation of the following destinations:

Branson's conversion rate fell one point from last year to 15% overall.

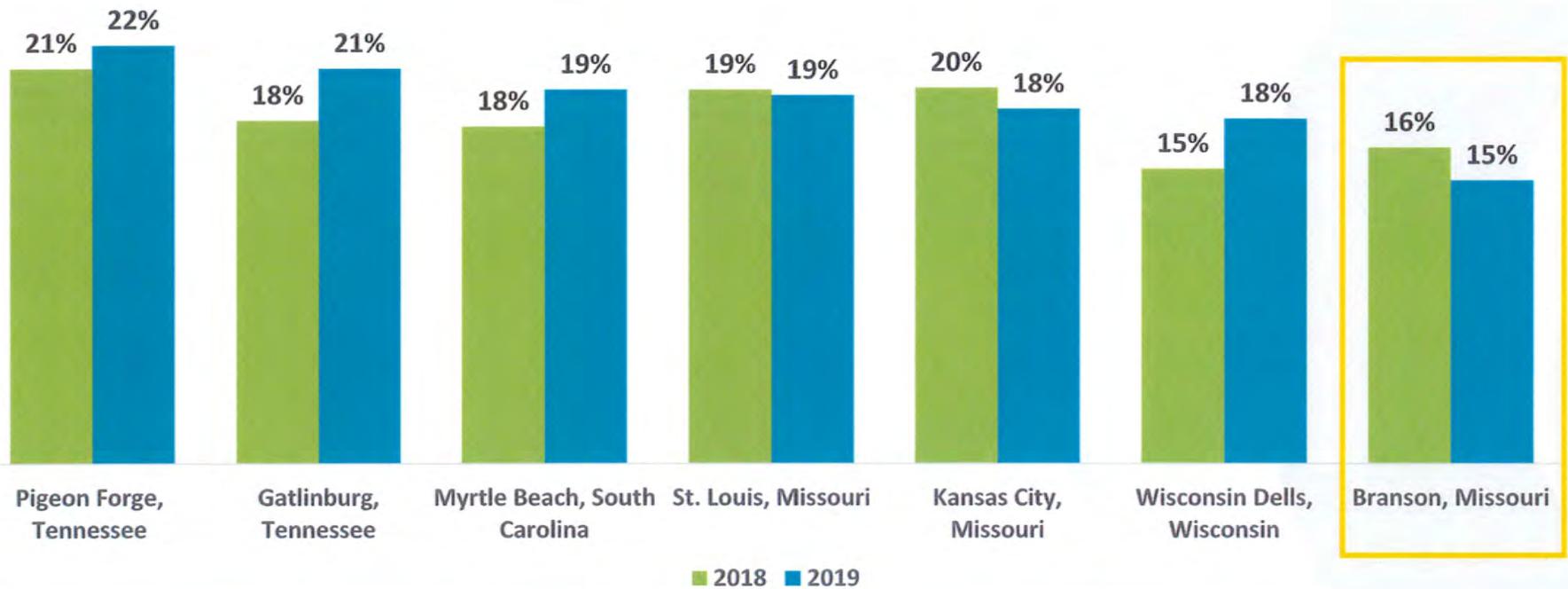


Q11: Please indicate your awareness and prior visitation of the following destinations:

*Conversion Rate = Recent Visitors/Market Potential

While Branson's conversion rate was in line with last year, it ranks low when compared to the competitive set.

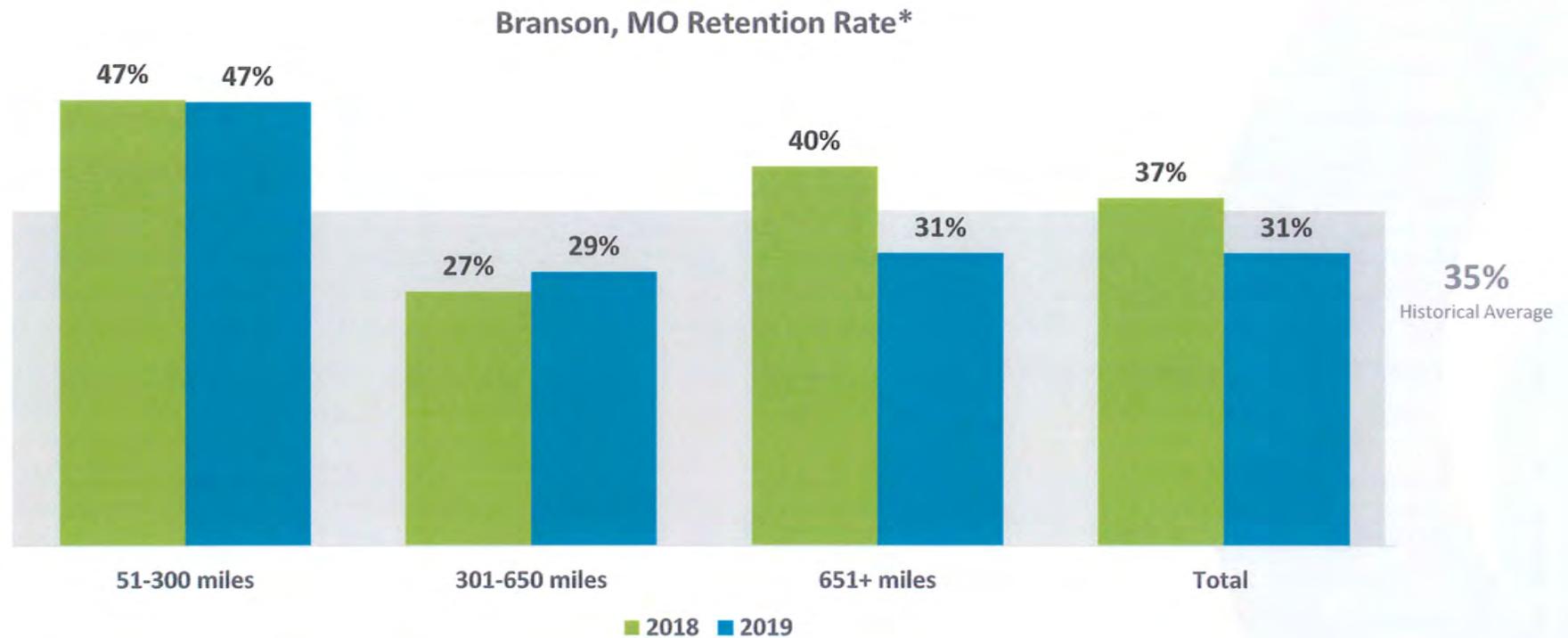
Competitive Set Conversion Rate*



Q11: Please indicate your awareness and prior visitation of the following destinations:

*Conversion Rate = Recent Visitors/Market Potential

Retention of visitors dropped a significant six points, driven by a nine point decrease among those 651+ miles from Branson.

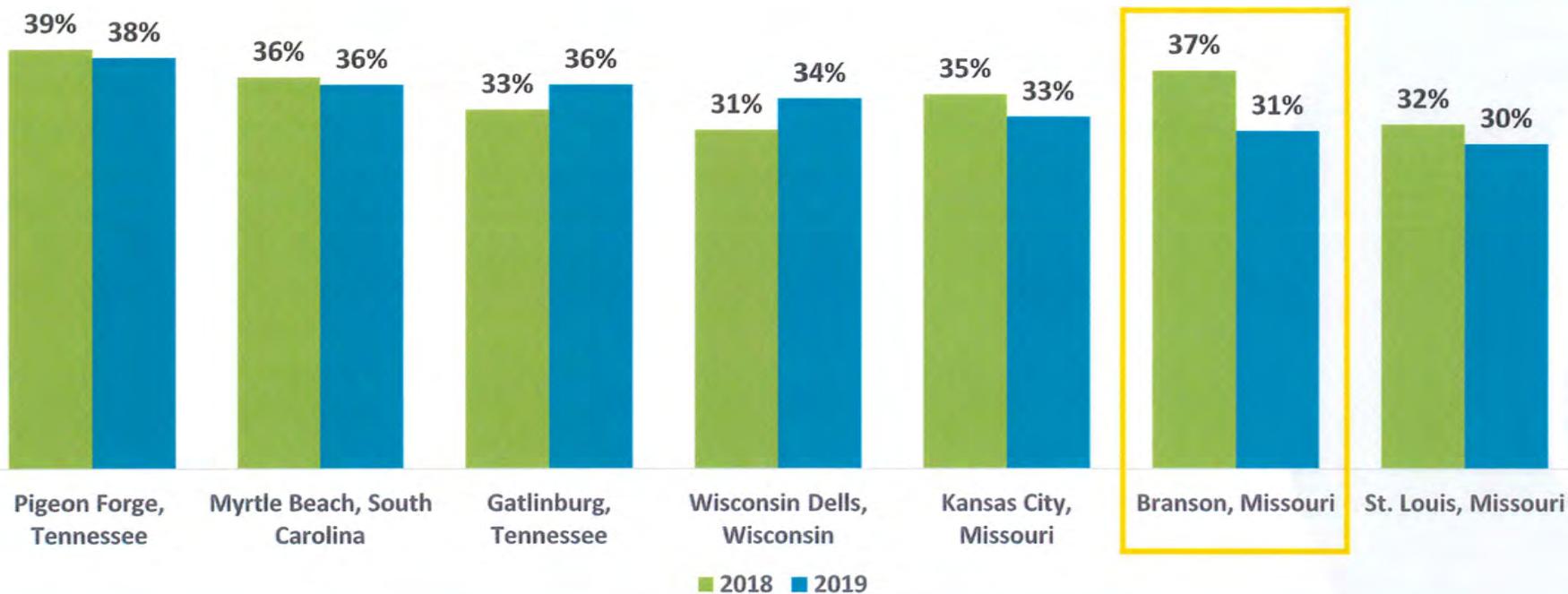


Q11: Please indicate your awareness and prior visitation of the following destinations:

*Retention Rate = Recent Visitors/Visitors Ever

This year's decrease in retention moved Branson down in the competitive set, ranking above St. Louis only.

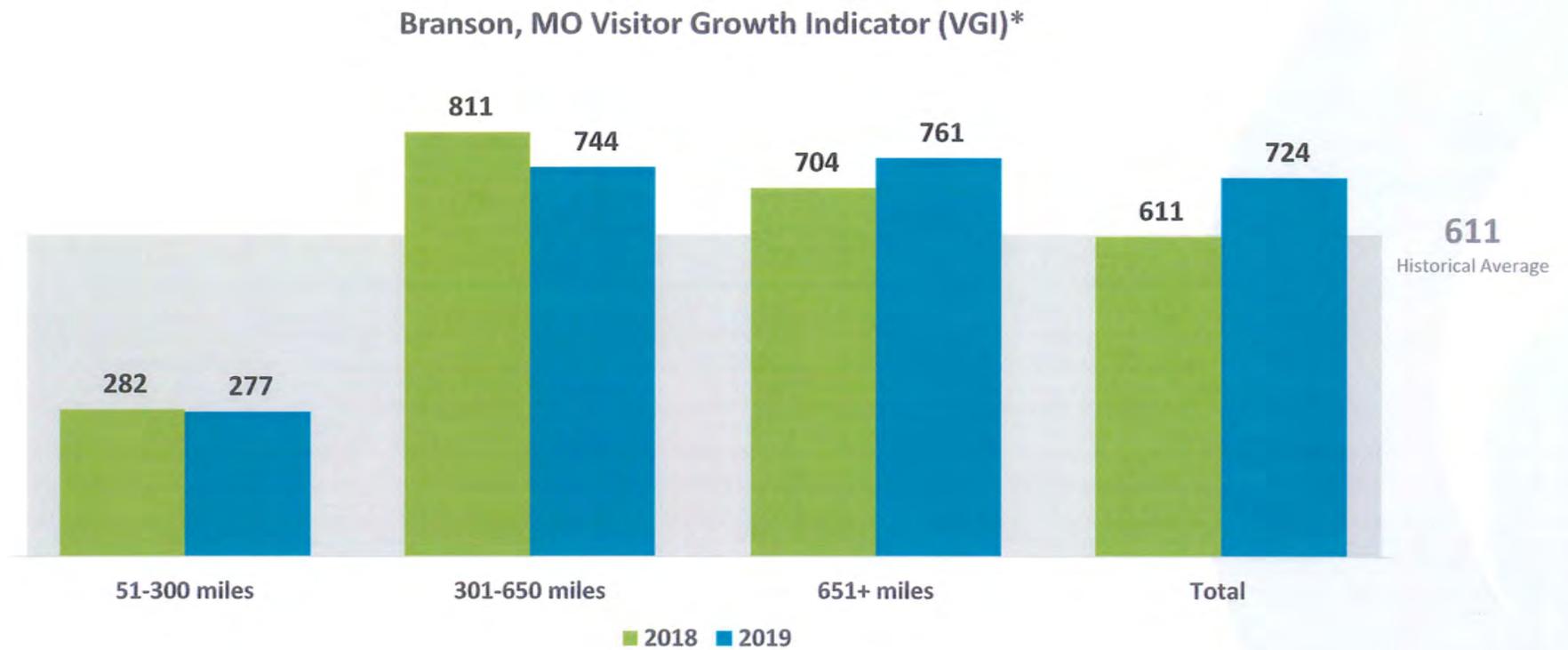
Competitive Set Retention Rate*



Q11: Please indicate your awareness and prior visitation of the following destinations:

*Retention Rate = Recent Visitors/Visitors Ever

Branson's potential for future growth reached record heights this year—topping the Historical Average by more than 100 points.

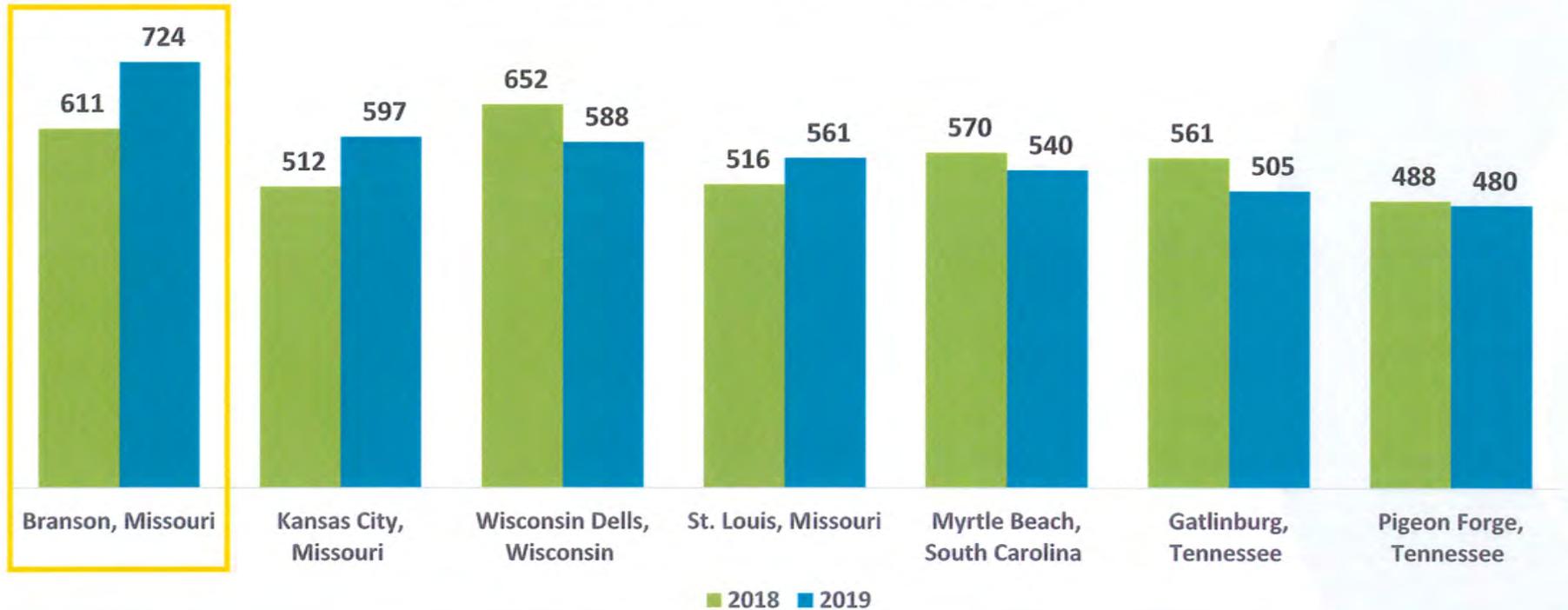


Q11: Please indicate your awareness and prior visitation of the following destinations:

*VGI = Market Potential / Market Share (% Recents)*100

Branson's high VGI reveals that the area has the strongest propensity for growth among the competitive set.

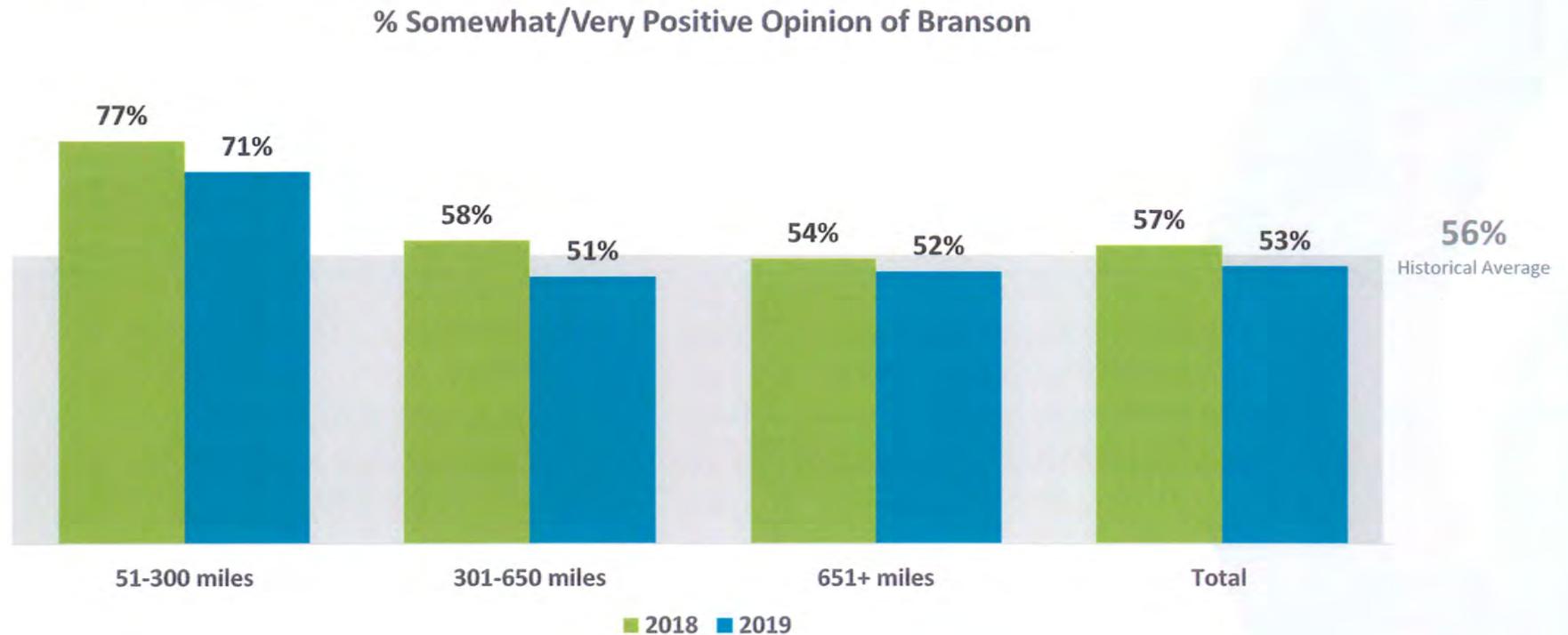
Competitive Set Visitor Growth Indicator (VGI)*



Q11: Please indicate your awareness and prior visitation of the following destinations:

*VGI = Market Potential / Market Share (% Recents)*100

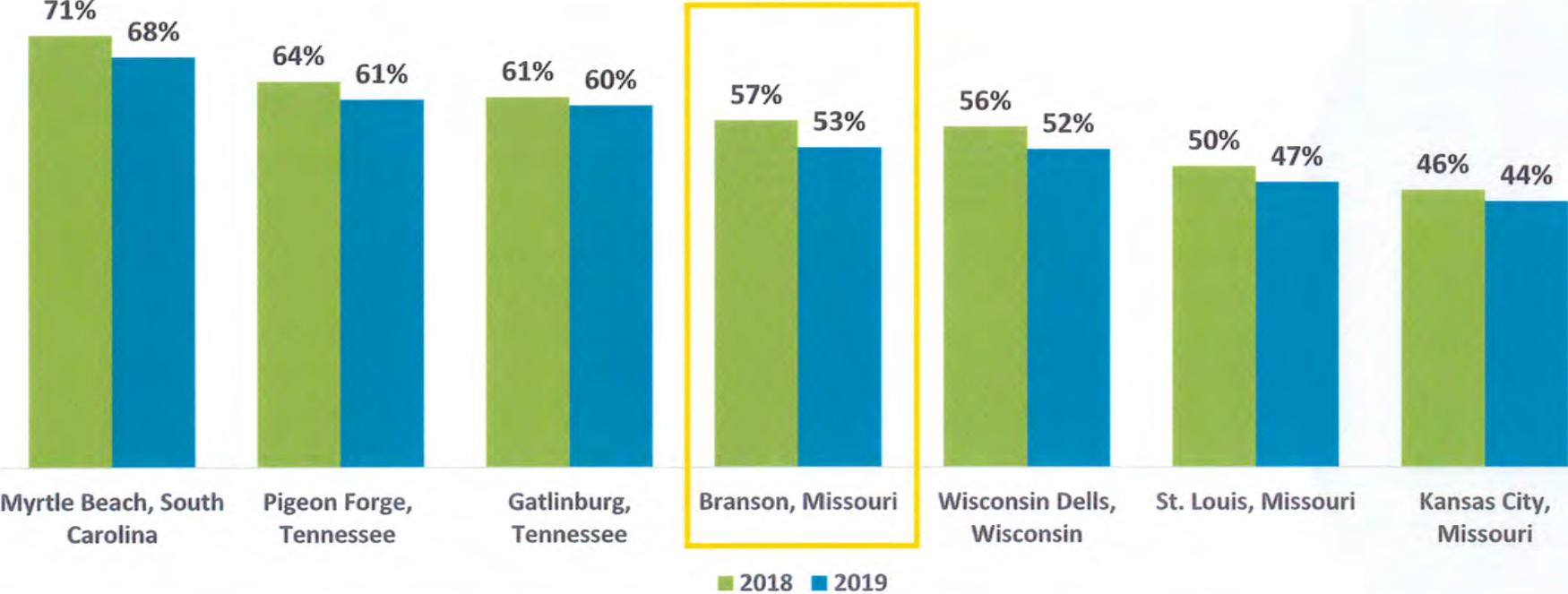
Decreases in positive opinion of Branson from each tier drove a four point decrease overall, bringing the level of favorable opinion down slightly below the Historical Average.



Q12: Using the scale provided, please indicate to what degree your opinion of these cities as vacation destinations is positive or negative.

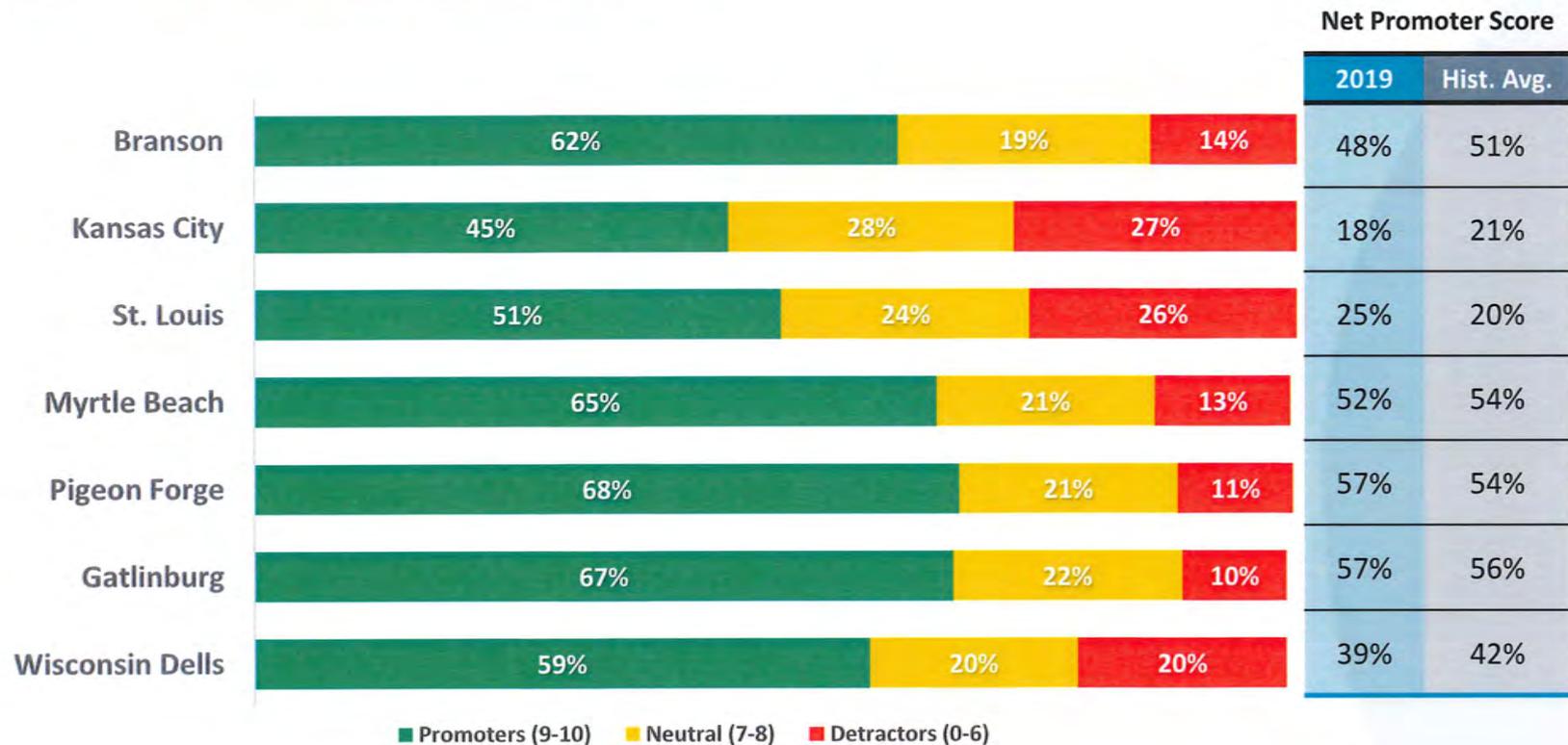
Opinions of destinations fell across the board this year, but Branson continues to hold the most positive opinion among Missouri cities.

% Somewhat/Very Positive Opinion of Competitive Set



Q12: Using the scale provided, please indicate to what degree your opinion of these cities as vacation destinations is positive or negative.

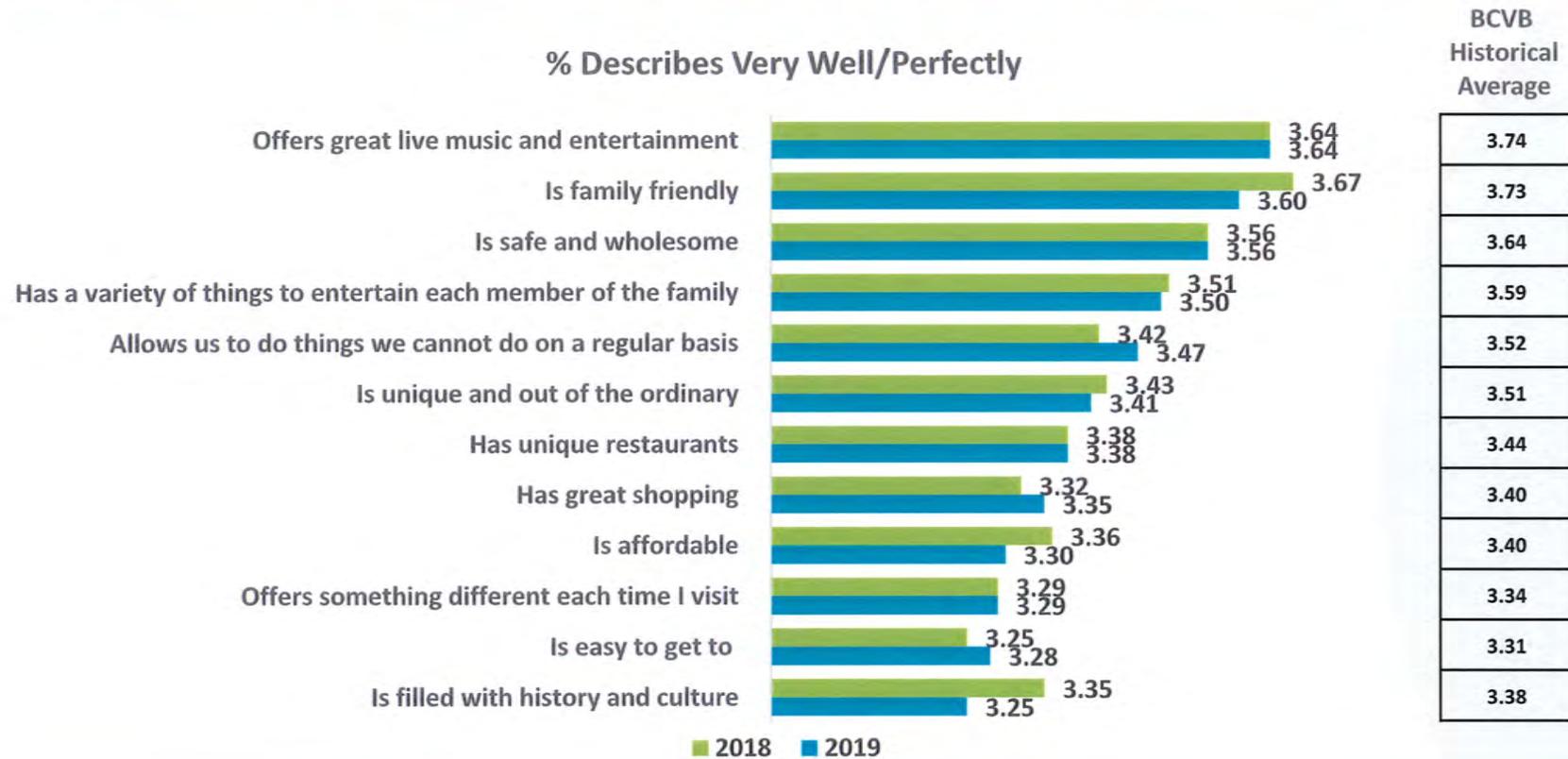
Branson's Net Promoter score slipped from 2018 (-11 points) and is in line with the Historical Average.



Q13: How likely are you to recommend each of these destinations to your friends or family members as places to spend a vacation?

RESPONDENT BASE: RECENTLY VISITED EACH DESTINATION | N=VARIES 45
 RECENTLY VISITED BRANSON | N=214

Branson's top brand attributes continue to be its great live music/entertainment, family friendliness and a safe/wholesome atmosphere.



Q17: How well do the following statements describe your impressions of the Branson area?

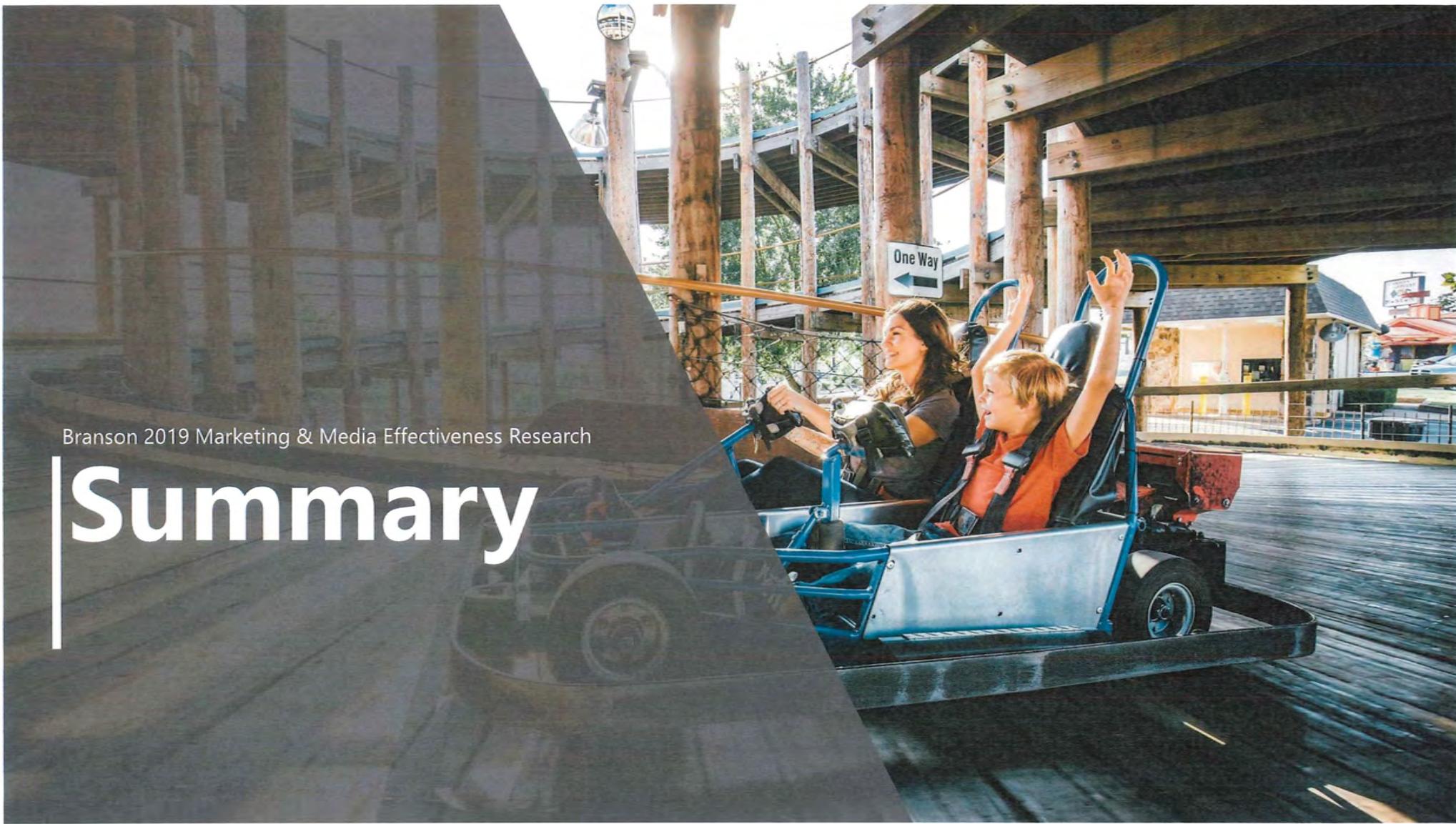
2019 Branson Traveler Profile

	Overall	Visitors (Past 3 Years)	Non-Visitors (Ever)	Brand Advocates*
Aware of Any Ad/PR	39%	66%	37%	79%
% Overnight Visits	100%	95%	n/a	96%
Length of Stay	4.8	3.8	n/a	4.4
% Hotel/Motel	54%	58%	n/a	62%
% Kids in Household	35%	47%	35%	54%
Household Size	2.5	2.7	2.5	2.8
Number of Visits	2.5	2.2	n/a	2.4
Intent to Visit (Post-Ad)	34%	72%	31%	100%
Post-Ad Intent Lift	+12 pts	-5 pts	+14 pts	+8 pts

*Brand Advocates are those who are likely to return and are also Promoters of the area.

Branson 2019 Marketing & Media Effectiveness Research

Summary



Branson/Lakes Area 2019 Total Marketing campaign Key Performance Indicators (KPI) Summary

The Branson/Lakes Area CVB 2019 marketing campaign generated \$559M in incremental spending with a Return on Investment of \$104—both record numbers for Branson since measurements began in 2009.

BCVB kept its level of marketing awareness on par with last year and above its Historical Average. The increases in incremental revenue also meant that a larger investment yielded the same cost per aware household as last year and one cent below the Historical Average.

Key Performance Indicators PAID MEDIA + PR (TOTAL)	2018	2019	BCVB Historical Average*
Traveler Households	84.1M	87.4M	85.4M
Aided Ad Awareness	42%	41%	36%
Aware Traveler Households	34.9M	35.9M	31.0M
Increment	+1.4%	+1.2%	+1.4%
Incremental Trips	489k	434k	408M
Incremental Travel Revenue	\$504M	\$559M	\$394M
Media Investment	\$5.3M	\$5.4M	\$4.6M
Cost/Aware Household	\$0.15	\$0.15	\$0.16
Return on Investment	\$95	\$104	\$83

*The BCVB Historical Average is a simple average of all data for total media campaigns measured since 2009.

Marketing Efficiency

- Consumer research drives decision making in Branson. The Branson/Lake Area CVB's (BCVB) 2019 marketing campaign reached 41% of travelers nationwide which equates to approximately 36M aware traveler households. Awareness dropped one point from last year but remains well above the Historical Average of 36%.
- Given a media investment comparable to last year (\$5.4M), the Branson Chamber/Convention & Visitors Bureau's (BCVB) cost per aware travel household averaged \$0.15—considered quite efficient compared to the H2R Proprietary Industry Norm (H2R Norm) of \$0.41. Additionally, BCVB's advertising campaign continues to outperform Branson's Historical Average of \$0.16.
- While efficiently reaching new travelers is an integral part of a successful campaign, marketing is said to be effective when the travelers who see the ads are ultimately more likely to have visited Branson than those who were not exposed to the marketing.



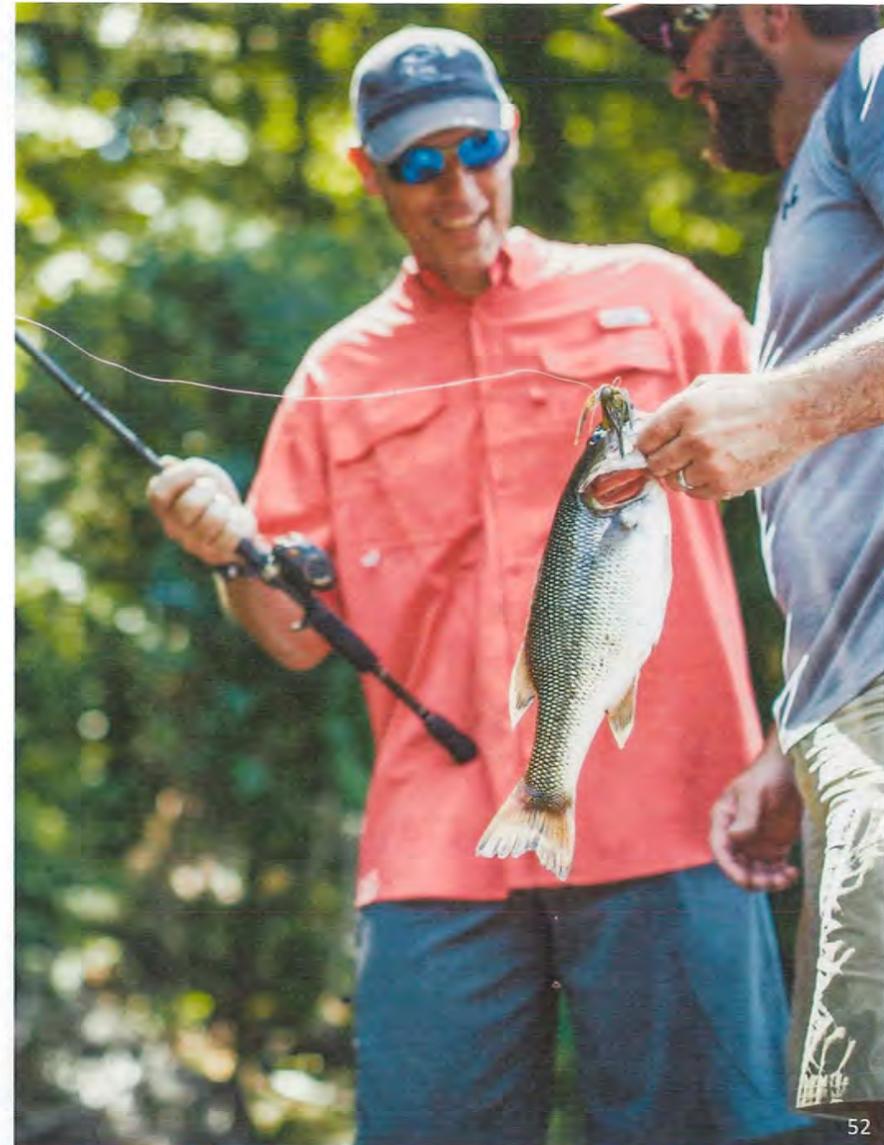
Incremental Impact

- BCVB's marketing campaign was efficient and influenced people to visit, driving incremental visitation across all three market tiers surveyed nationwide: 51-300 miles (+1.8%), 301-650 miles (+0.5%) and 651+ miles (+1.5%). This year's campaign delivered an incremental impact among the outermost market that was larger than last year's and the Historical Average, although the Tier within 51-650 miles of Branson saw fewer incremental trips than last year.
- Extrapolated across the pool of aware travel households, it is projected that BCVB generated 434k incremental trips that would likely not have occurred had the campaign not been in place. Likewise, these incremental visits generated nearly \$559M in incremental travel spending for the Branson area—topping last year's spending level by 11%.
- Overall, the campaign generated an ROI of \$104 marking a 9% increase over the 2018 ROI and 25% higher than the Historical Average.



Advertising Evaluation

- More than two-thirds of travelers (67%) indicated they enjoyed Branson's overall collection of ads, while another 69% indicated the ads made the Branson area seem more appealing as a destination. Additionally, 58% of travelers indicated the ads were differentiated from other destination advertising they have seen.
- Overall, travelers felt these ads do a good job of capturing the Branson experience (70%), provide information on lots of different show experiences (69%) and provide new information they did not previously know (68%).
- And, BCVB's marketing campaign increased travelers' intent to visit the area by 11 points. This year's lift was in line with last year's +12 points and ties with the Historical Average for lift in intent to visit Branson (+11 points).



Visitation Growth Potential

- Branson's market potential of past visitors and considerers increased three points to 43% of travelers nationwide and converted 15% of that market potential into visitors. This year, Branson's retention rate averaged 31% (share of recent visitors relative to all who have visited in the past).
- Branson continues to show a high propensity for future visitation growth. Relative to the ratio of recent visitors, Branson's market potential yields an index of 724 – indicating the market's potential is 7.2 times its current share. This index ranks Branson first among the competitive set and is significantly higher than average among the competitive set (527).
- This year Branson earned a Net Promoter Score (NPS) of 48%—near the Historical Average of 51%, but down 11 points from last year's record high of 59%. This NPS ranks Branson fourth among the competitive set of destinations measured in this study.



Thank You!



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