

== NOTICE OF MEETING ==

BOARD OF ALDERMEN

Special Study Session – Thursday, September 3, 2020 – 2:00 p.m.
Council Chambers – Branson City Hall – 110 W. Maddux

NOTE: In an effort to follow the recommendations of the Centers for Disease Control to limit the spread of COVID-19 and to protect the health and safety of those in attendance, the City of Branson encourages the public to view the live streaming of this meeting on the City of Branson, Missouri, website at: <http://www.bransonmo.gov/AgendaCenter>. For those that wish to attend the Board meeting in person, face coverings are required inside the council chambers and the occupant load of the council chambers and viewing area(s) will be limited.

AGENDA

- 1) Call to Order.
- 2) Roll Call.
- 3) Discussion on Ordinance 2020-0072 pertaining to face coverings, public spaces and the spread of communicable diseases.
- 4) Adjourn.

Where Values are the Difference

SEPTEMBER: STEWARDSHIP

Wise and cost efficient utilization of all resources

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

Lisa Westfall, City Clerk, 417-337-8522

Posted: September 1, 2020

At: _____ By: _____

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STAFF REPORT

ITEM/SUBJECT: DISCUSSION ON ORDINANCE 2020-0072 PERTAINING TO FACE COVERINGS, PUBLIC SPACES AND THE SPREAD OF COMMUNICABLE DISEASES.

INITIATED BY: LEGAL DEPARTMENT

DATE: SEPTEMBER 3, 2020

EXECUTIVE SUMMARY:

- Ordinance 2020-0072 pertaining to face coverings, public spaces and the spread of communicable diseases went into effect on July 31, 2020. It is set to expire on September 8, 2020.
- The City will provide information to the Board for discussion on the effects of Ordinance 2020-0072 on tourism, marketing and the public health of the community.

FINANCIAL IMPACT:

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

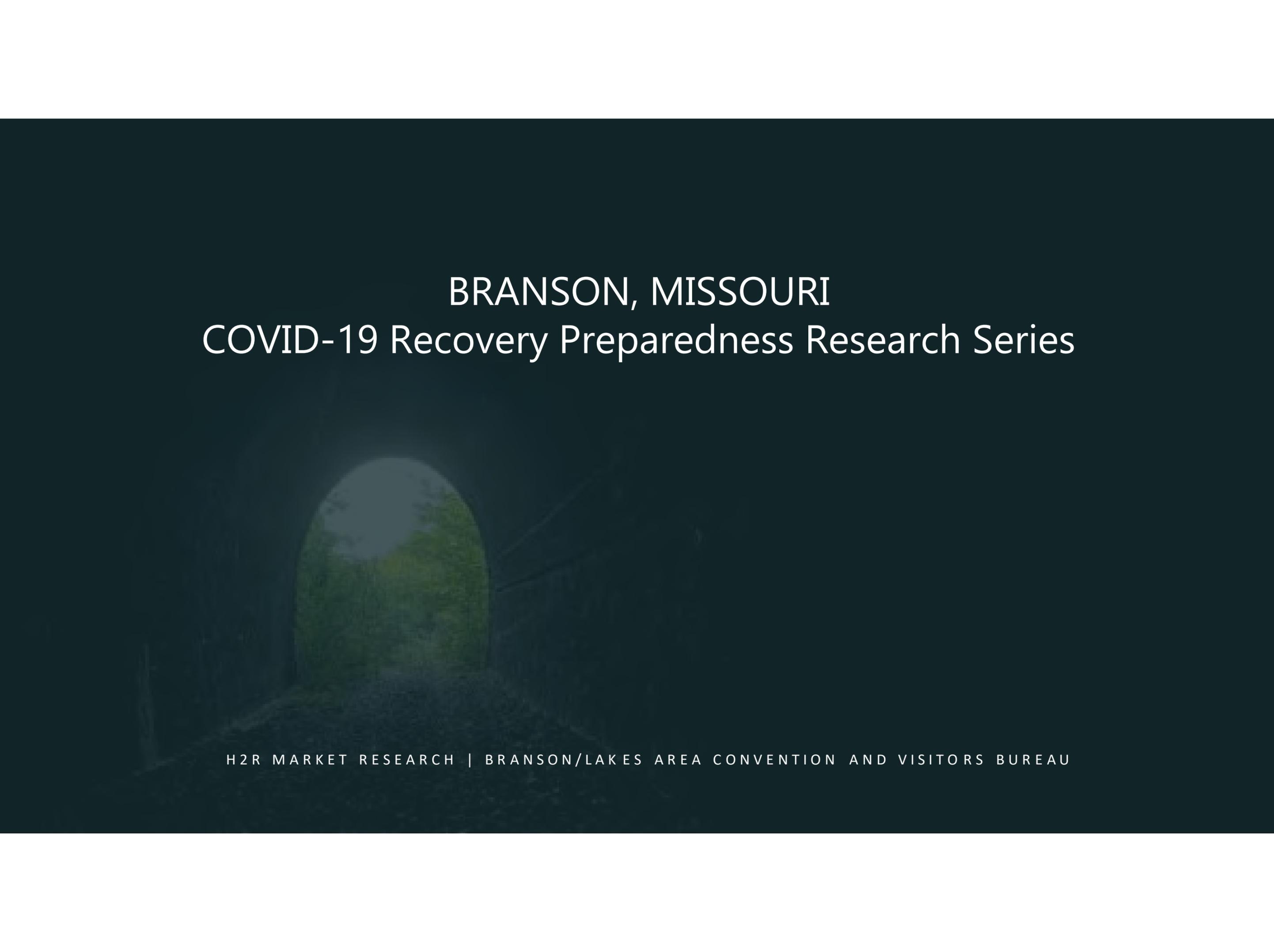
COMMUNITY PLAN 2030: C-1: Public Safety

ATTACHED EXHIBITS: Exhibit 1 - Powerpoint

STAFF RECOMMENDATION:

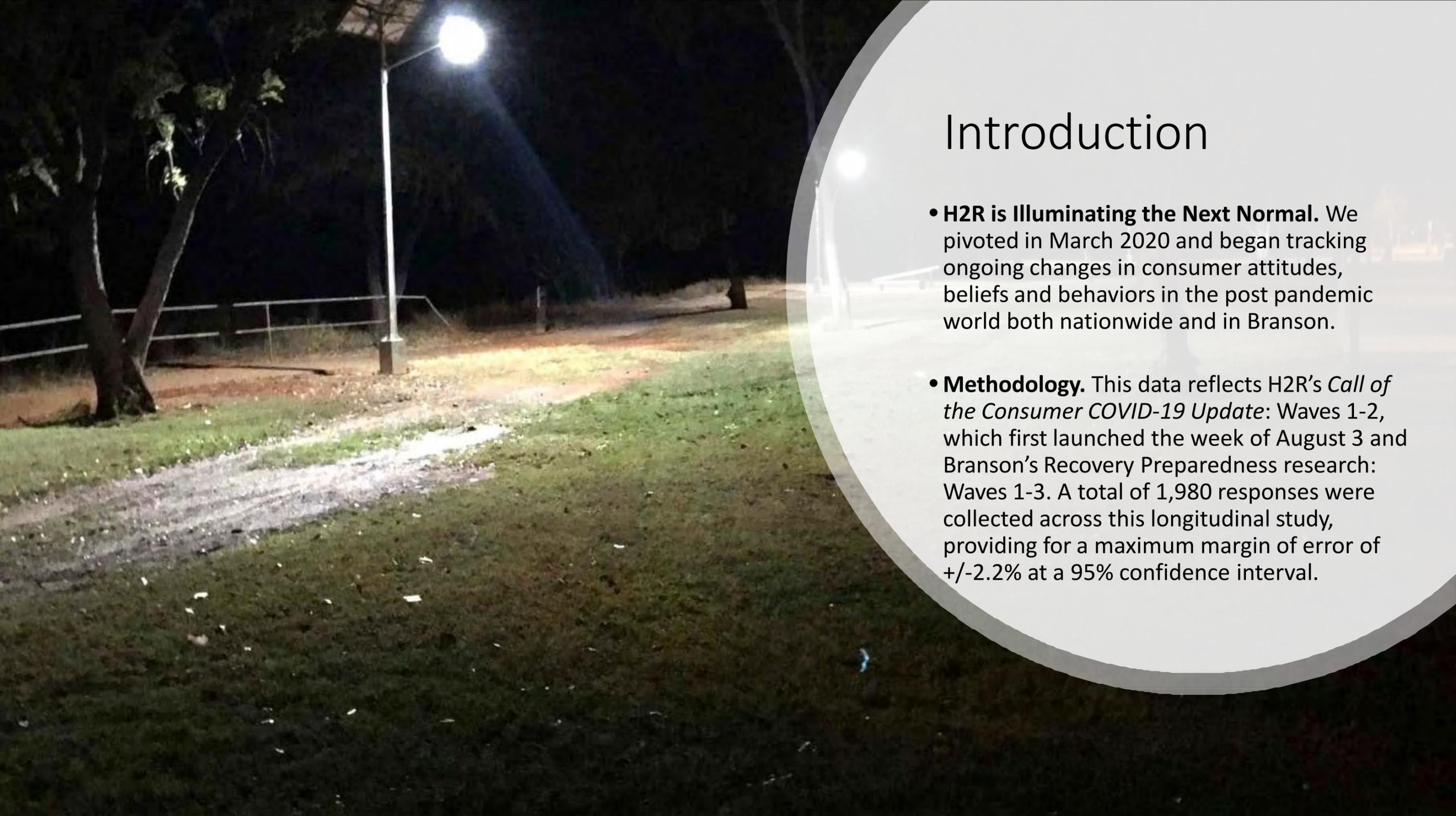
- Recommended
 Not Recommended
 Neutral/None

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BRANSON, MISSOURI
COVID-19 Recovery Preparedness Research Series

H2R MARKET RESEARCH | BRANSON/LAKES AREA CONVENTION AND VISITORS BUREAU

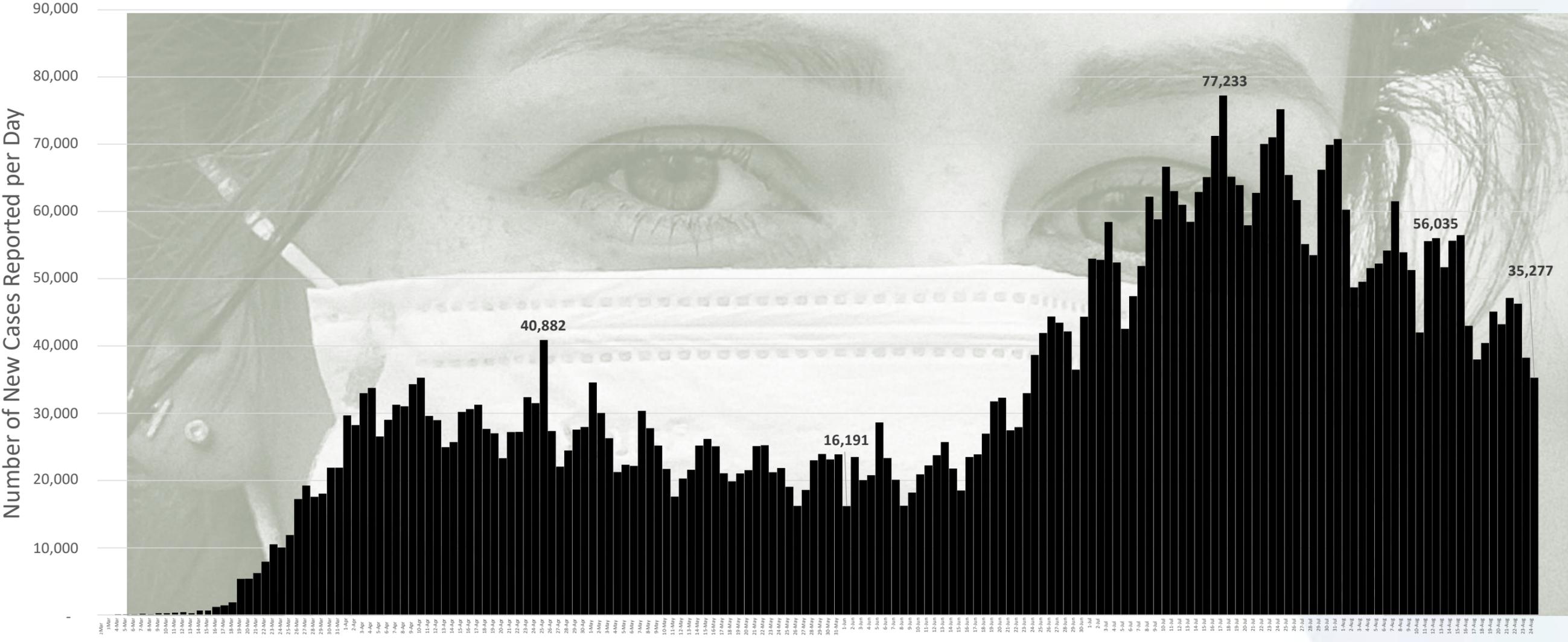


Introduction

- **H2R is Illuminating the Next Normal.** We pivoted in March 2020 and began tracking ongoing changes in consumer attitudes, beliefs and behaviors in the post pandemic world both nationwide and in Branson.
- **Methodology.** This data reflects H2R's *Call of the Consumer COVID-19 Update: Waves 1-2*, which first launched the week of August 3 and Branson's Recovery Preparedness research: Waves 1-3. A total of 1,980 responses were collected across this longitudinal study, providing for a maximum margin of error of +/-2.2% at a 95% confidence interval.

Total U.S. virus infections are nearing 6.0 million, and new cases remain above 40k per day with a positivity rate of 7.0% (10.6% in Missouri).

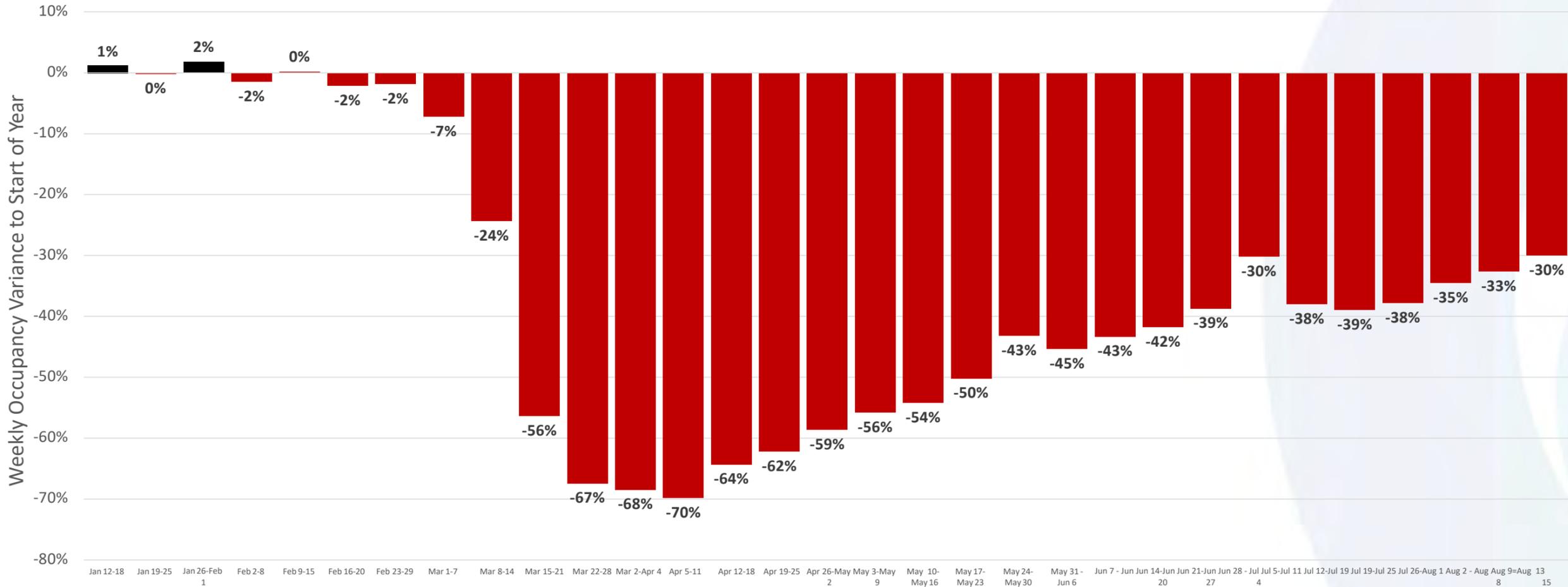
Number of New Cases of Coronavirus Reported per Day in the United States



Source: The COVID Tracking Project, <https://covidtracking.com/data/>, August 24, 2020

The U.S. is in a travel depression with weekly hotel occupancy falling by nearly 70% in early April and it remains 30% below last year.

Weekly Hotel Occupancy Rates % Variance by Week



Source: STR, August 19, 2020



Lives and livelihoods upended

- **COVID has disrupted** nearly every daily routine in life and created a **rare moment** in history.
- **Consumers have changed.**
- **No playbook.** Neither history nor experience prepared any of us.
- **All that matters now** is how travelers feel, what they think, what they're willing to do and when. In an uncertain world, data matters.
- We must identify consumers' **new beliefs, habits and "peak moments"** to drive behavioral change.
- **New winners & losers.** Our collective goal should be to ensure we end up on the right side of the ledger.

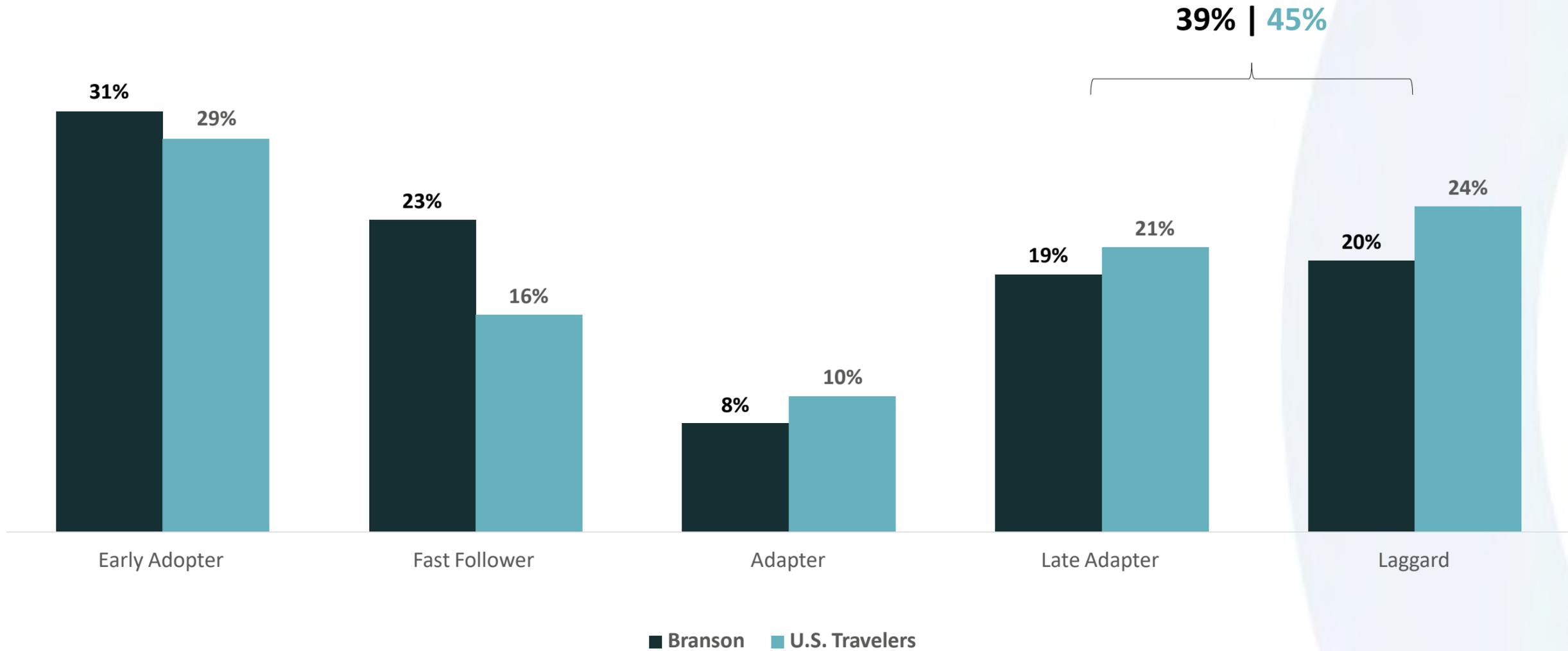
Travel today is
all about risk
tolerance

Some travelers (**Early Adopters**) exhibit little concern over **COVID-19** while others (**Laggards**) are terrified. These consumer beliefs self-categorize travelers into one of five travel buckets.

- **Early Adopters.** No fear, few masks, have already ventured out (Summer Visitors).
- **Fast Followers.** Travel is planned and trips are imminent (Summer/Fall).
- **Adapters.** Need to see others traveling safely first. (Fall/Holiday)
- **Late Adapters.** Need to see a steady decline in the number of new COVID cases. (Early 2021)
- **Laggards.** Need to see a safe and effective vaccine put an end to all virus fears. (Late 2021)

Nearly 40% of Branson travelers (and half of travelers nationwide) self- categorize as Late Adapters or Laggards and will not travel anytime soon.

Travelers by Risk Tolerance Segment



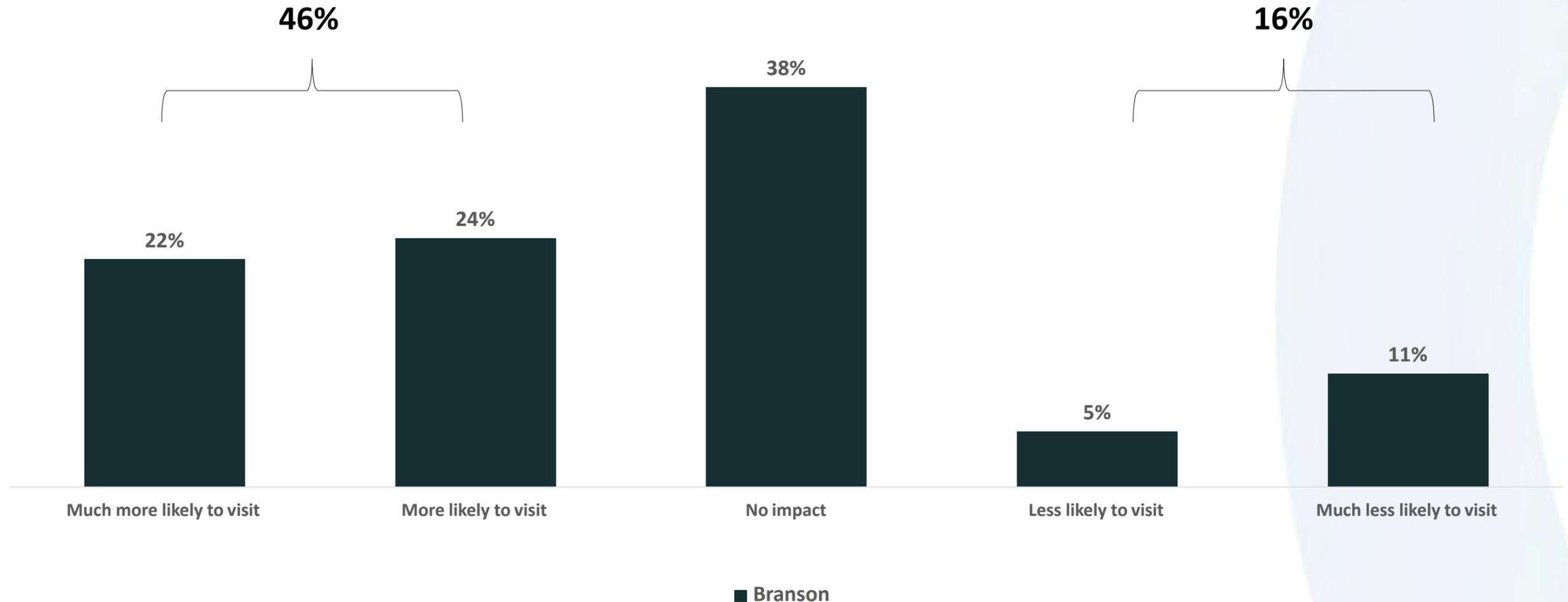
SOURCE: Branson COVID-19 Recovery Preparedness Study, H2R Market Research, August 2020

Mask chaos

- **Masks are divisive.** But the gap has narrowed.
- **Most Branson travelers now favor mask mandates.**
 - 84% are more likely/just as likely to visit destinations with mask mandates.
 - Nearly half (46%) say they are **MORE LIKELY** to visit with a mask mandate compared to just 16% who say they are **LESS LIKELY** to visit, 2.8:1.0.
- **But Branson travelers are less enthusiastic about masks than the average traveler.**
 - Nationwide, 60% of travelers say they are more likely to visit destinations with mask mandates vs 9% who are less likely to visit*.
 - Thus, contextually, Branson visitors are 24% less likely than national travelers to favor masks, and 16% are less likely compared to 9% nationwide.

Most Branson travelers (84%) say they are more likely/just as likely to visit places with mask mandates. And, those who are more likely to visit (46%) outnumber those less likely (16%) by a margin of nearly 3 to 1.

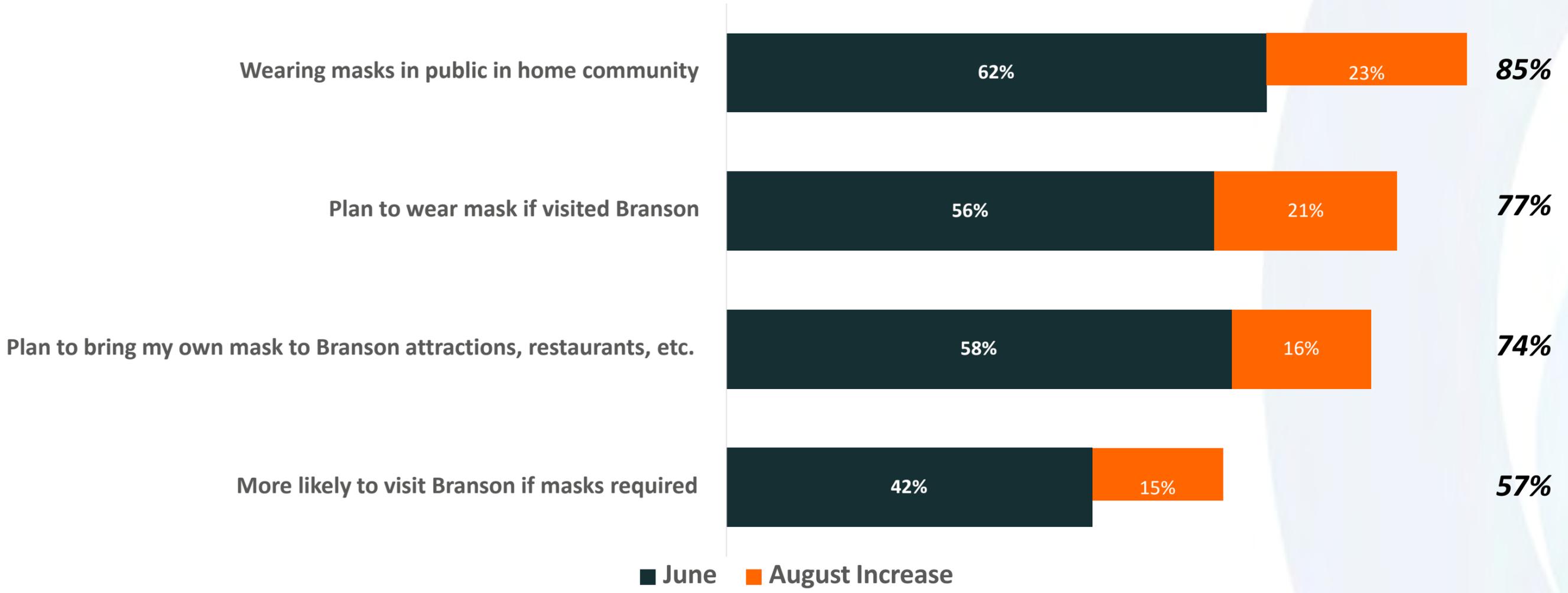
Impact of Destination Mask Mandates



SOURCE: Branson COVID-19 Recovery Preparedness Study

Mask affinity among Branson travelers has increased in recent months.

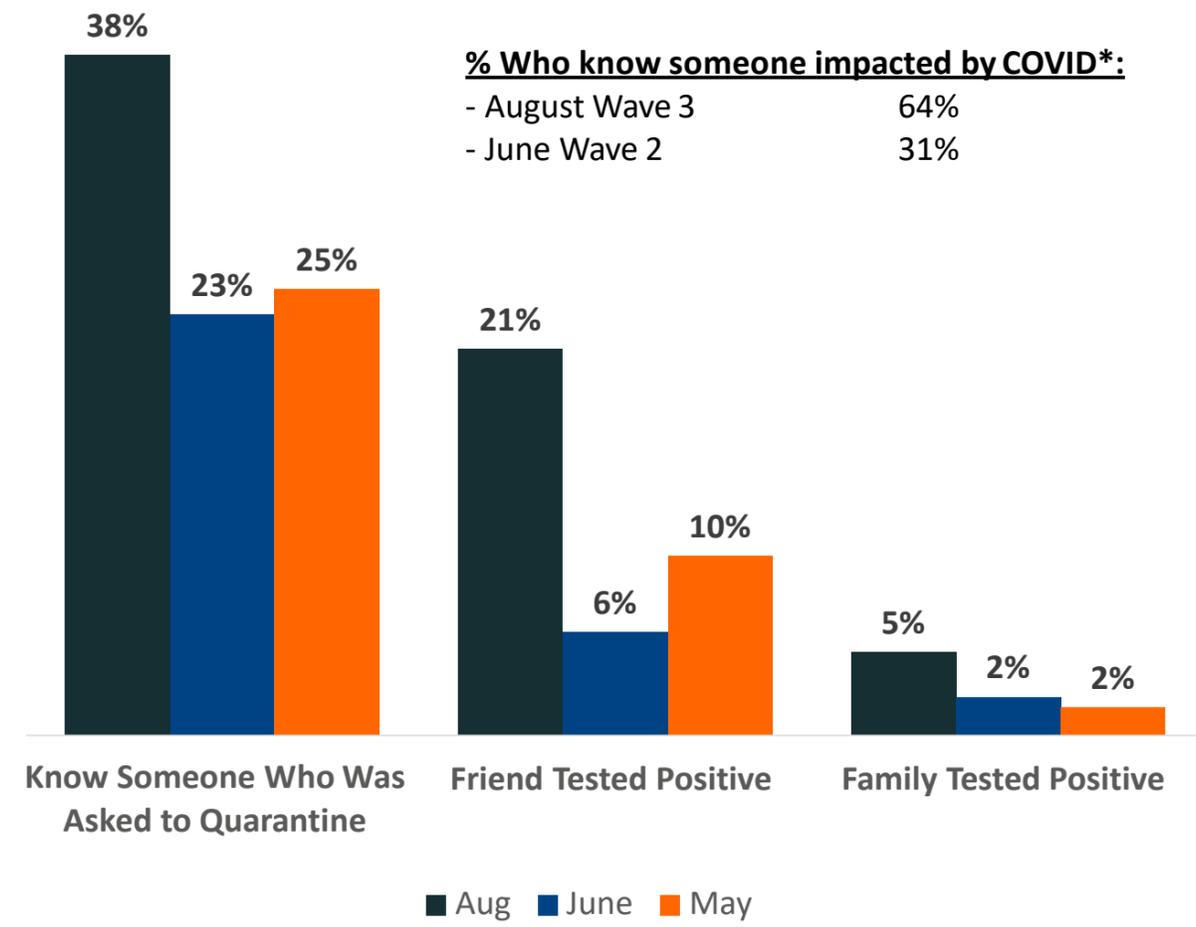
% Taking Following Actions:



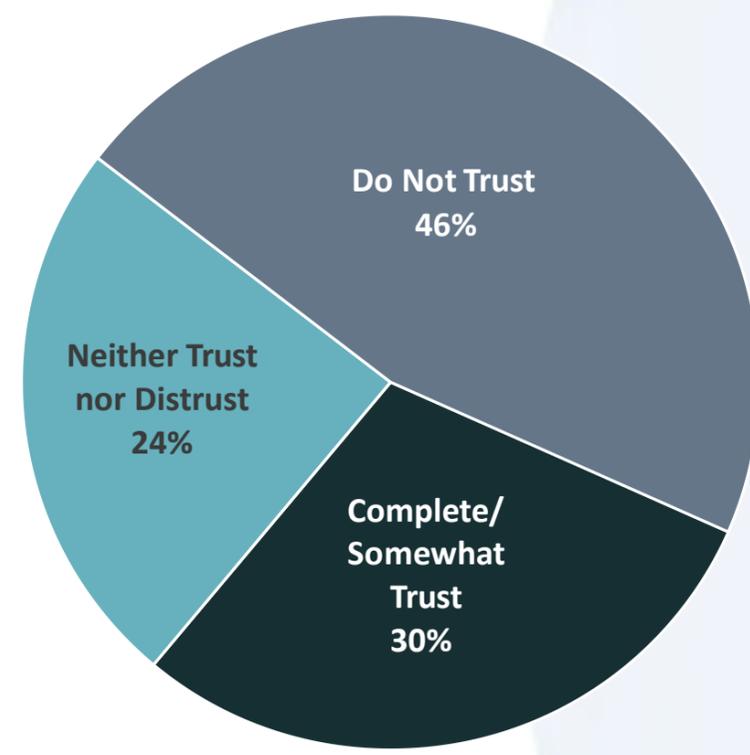
SOURCE: Branson COVID-19 Recovery Preparedness Study, H2R Market Research, August 2020

Mask affinity has increased because the virus has gotten much closer to home and due to a lack of trust in other people.

Experience with COVID-19



Trust Others to Act Responsibly



SOURCE: Branson COVID-19 Recovery Preparedness Study, H2R Market Research, August 2020
*Know someone asked to quarantine or have a friend or family/self who tested positive for COVID-19.

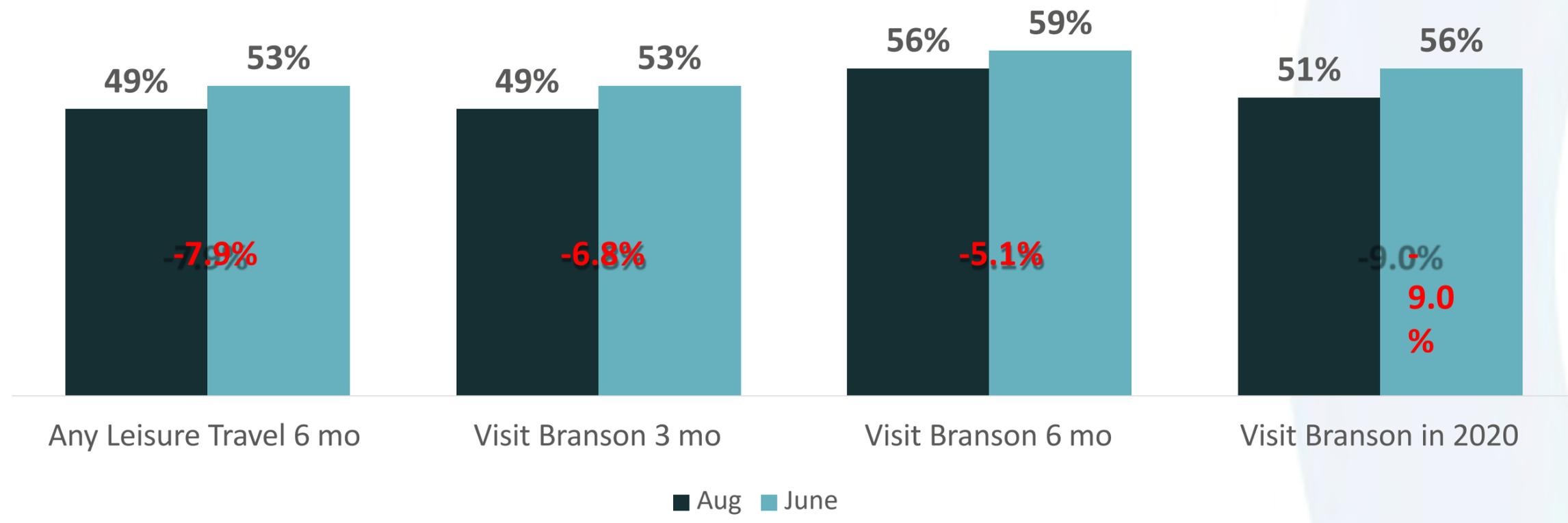
Travel intentions have slumped

- **There exists a very strong correlation between intent and new cases of COVID-19.**
 - Pearson's correlation = 87%
 - $r^2 = 64\%$ (meaning that 64% of change in intentions explained by change in number of COVID cases).
- **Intent to travel for leisure among Branson prospects is down 8% from June***. (49% Aug vs 53% June)
- **Intent to visit Branson has also declined.**
 - Intent to visit in 3 months -6.8%
 - Intent to visit in 6 months -5.1%
 - Intent to visit in 2020 -9.0%

**Note: Two weeks later in the 2nd Wave of Call of the Consumer travel intent finally turned the corner and increased by 9 points from 28% to 37%.*

Intent to visit among Branson prospects has steadily declined over the past few months as the number of COVID cases increased.

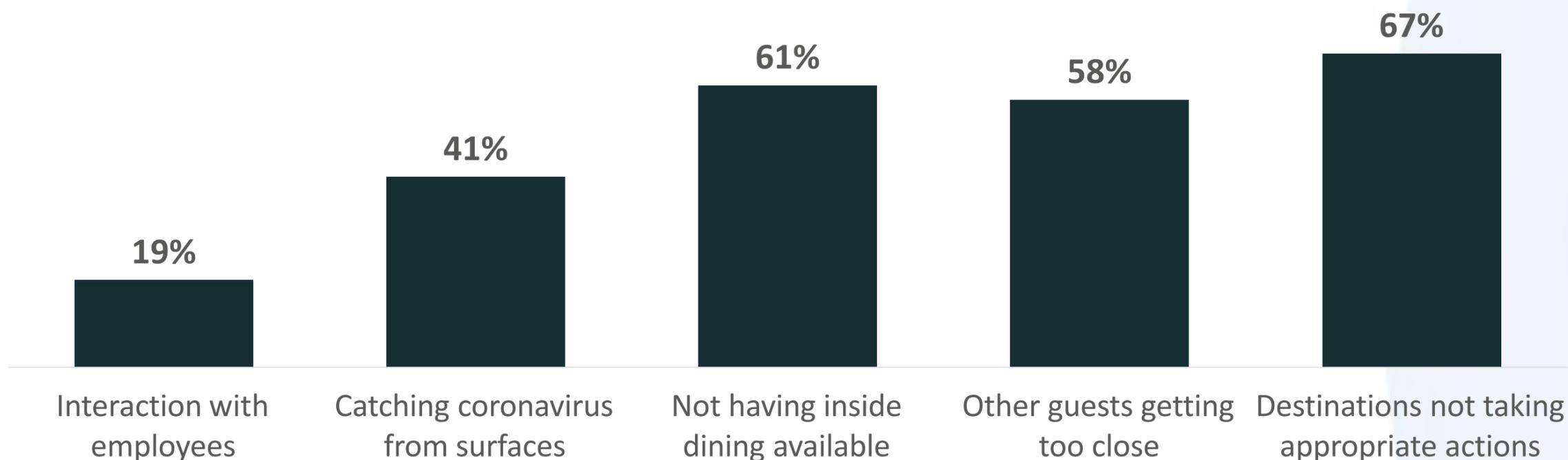
Intent to Visit Branson – August vs June Waves



SOURCE: Branson COVID-19 Recovery Preparedness Study, H2R Market Research, August 2020

The biggest barriers to travel are “Destinations not taking appropriate actions” and “Not having restaurant dining areas open”

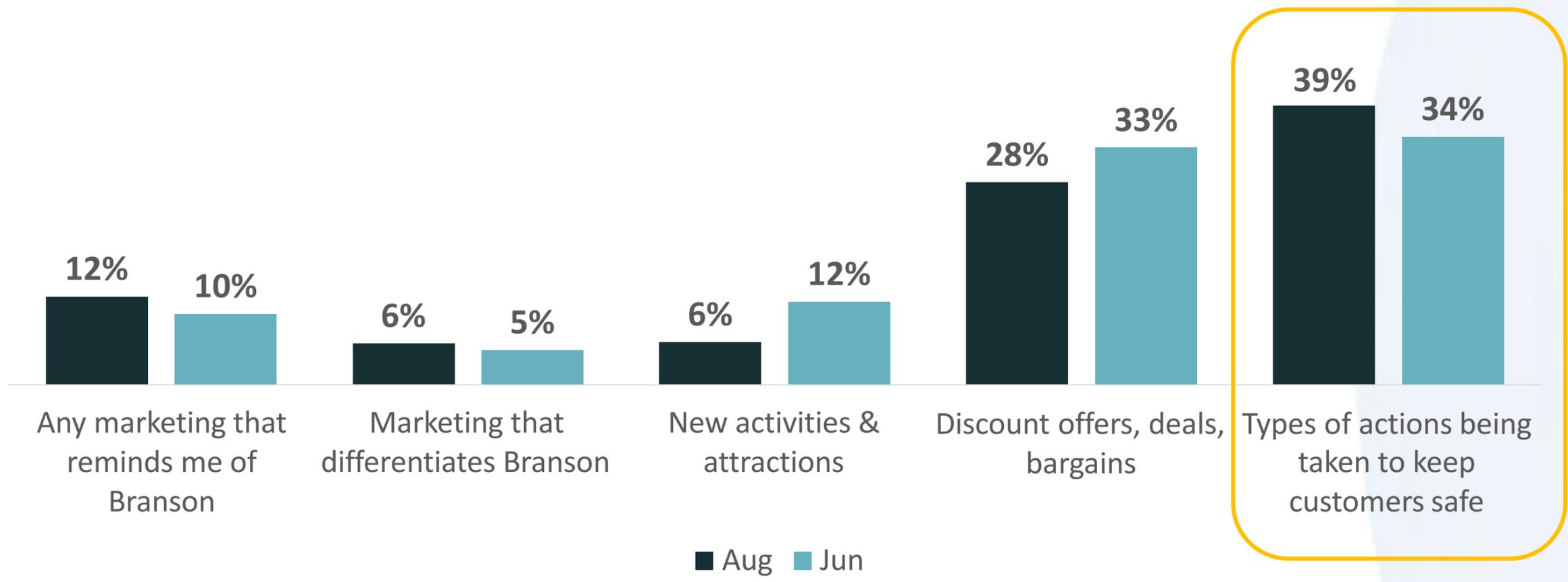
Barriers to Traveling



SOURCE: Branson COVID-19 Recovery Preparedness Study, H2R Market Research, August 2020

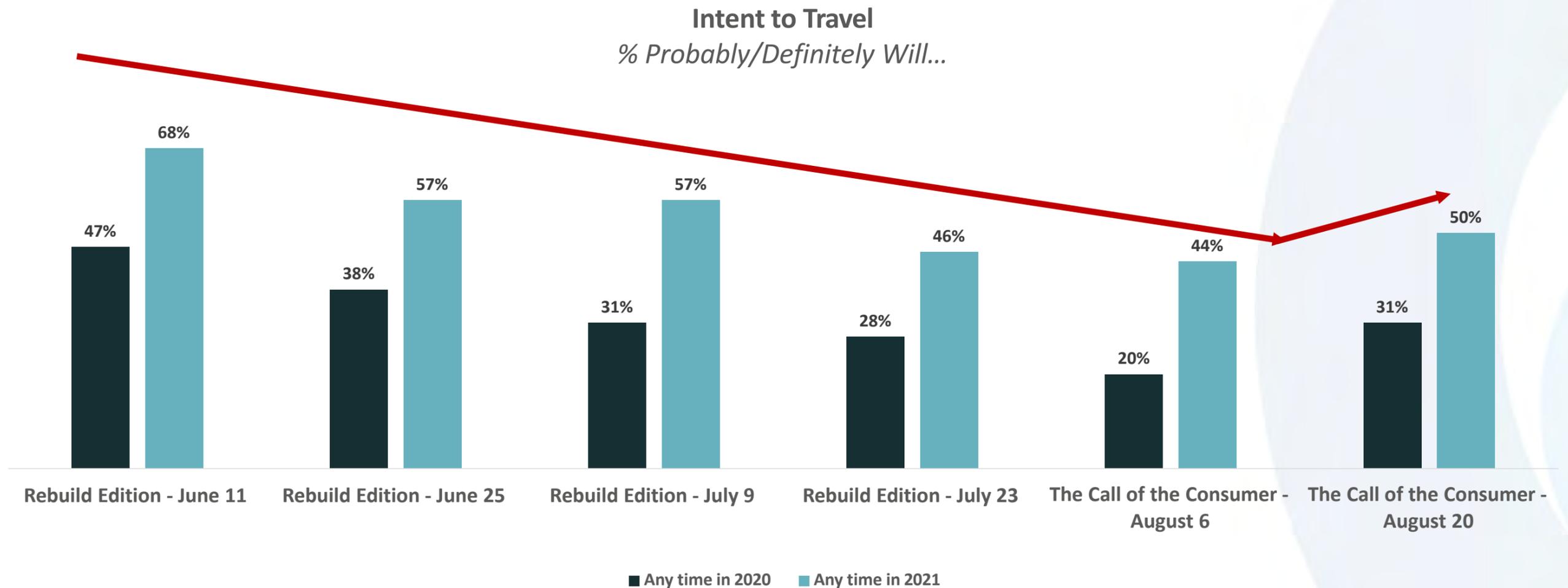
Travelers still prefer marketing messages that tell them what changes have been made to keep them safe from COVID-19, surpassing “Discounts” in every wave of the study.

The ONE Marketing Message Most Likely to Inspire a Trip

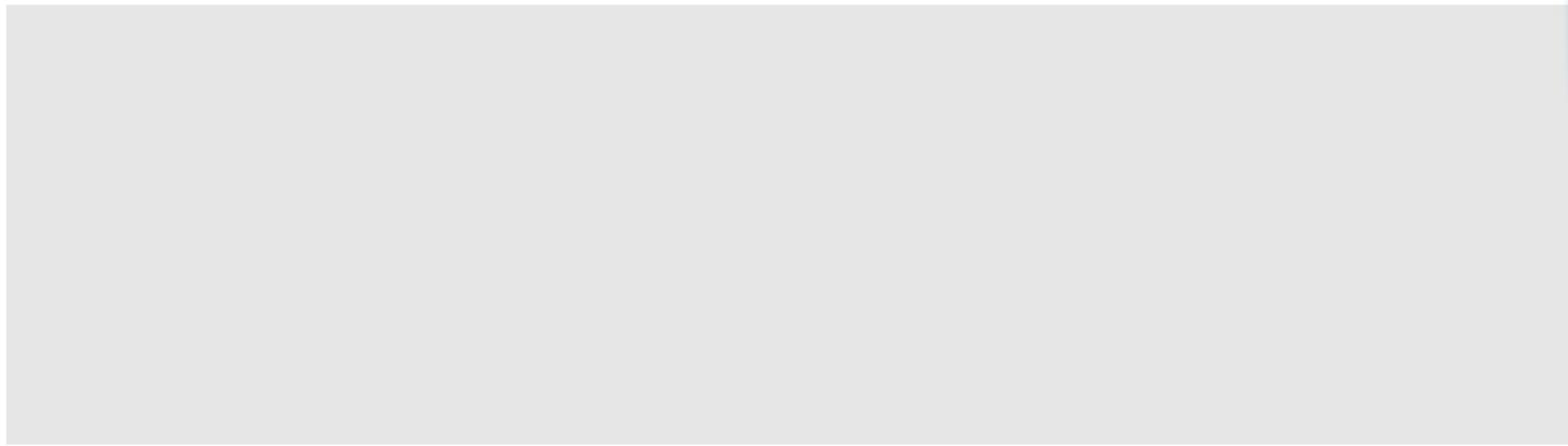


SOURCE: Branson COVID-19 Recovery Preparedness Study, H2R Market Research, August 2020

That was in early August and the story continues to change. In recent weeks COVID cases have started declining and as a result last week we saw the first uptick in travel intent nationwide that we've since early June.

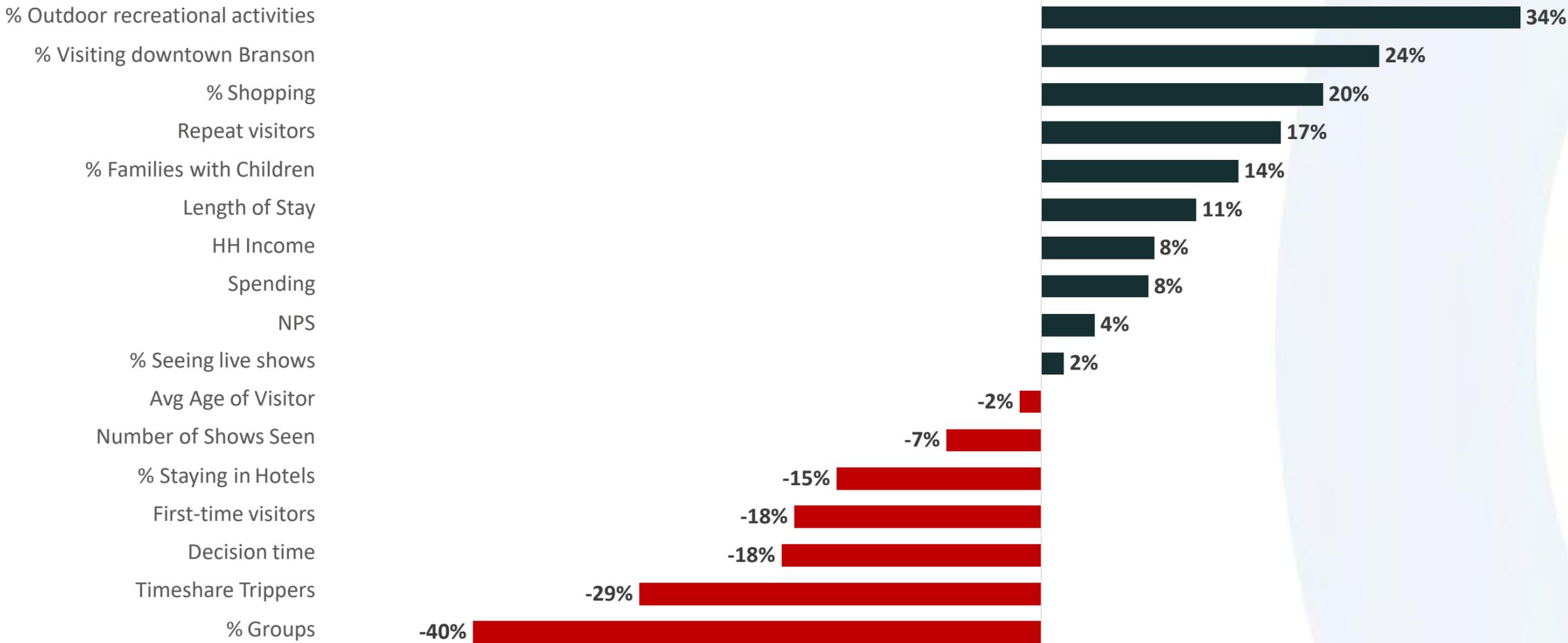


But wait! There's more!



According to Branson’s Visitor Intercept Research, visitors look different and are doing different things this year – more outdoor activities and repeat visitors and fewer groups and first-timers.

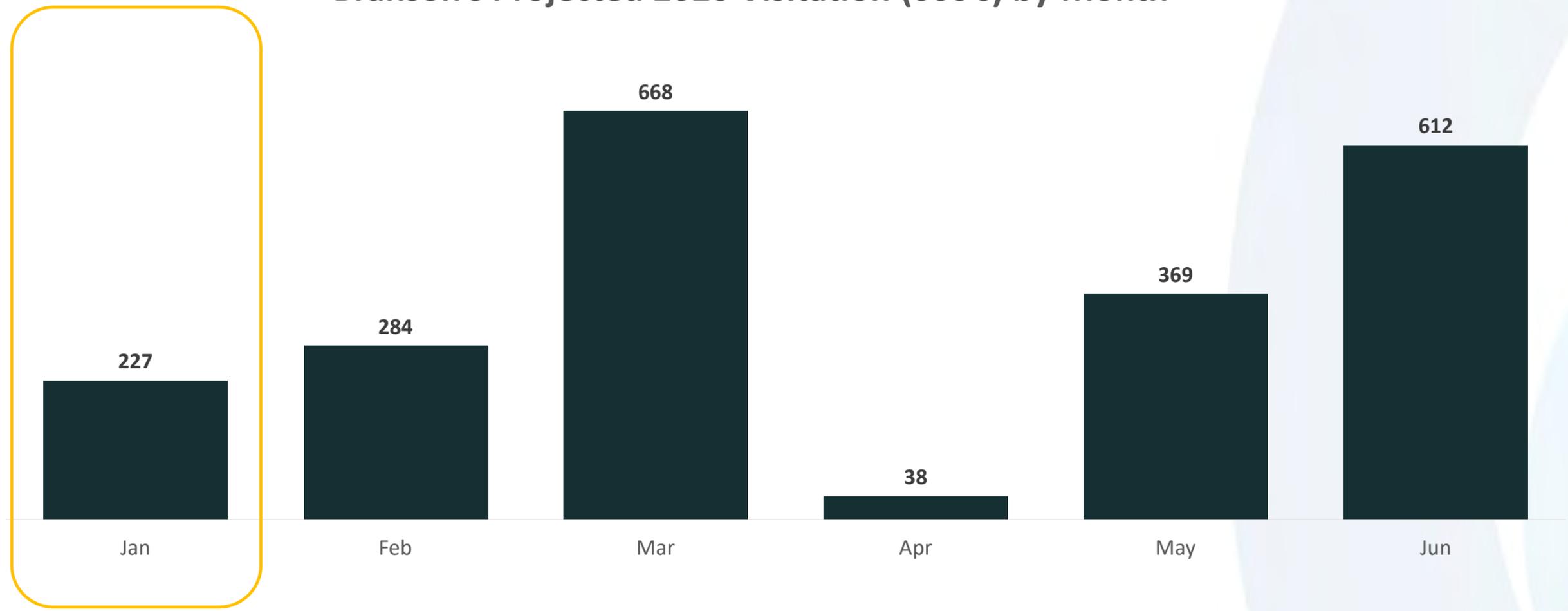
% Variance to July YTD 2019



Data as of 8/17/20

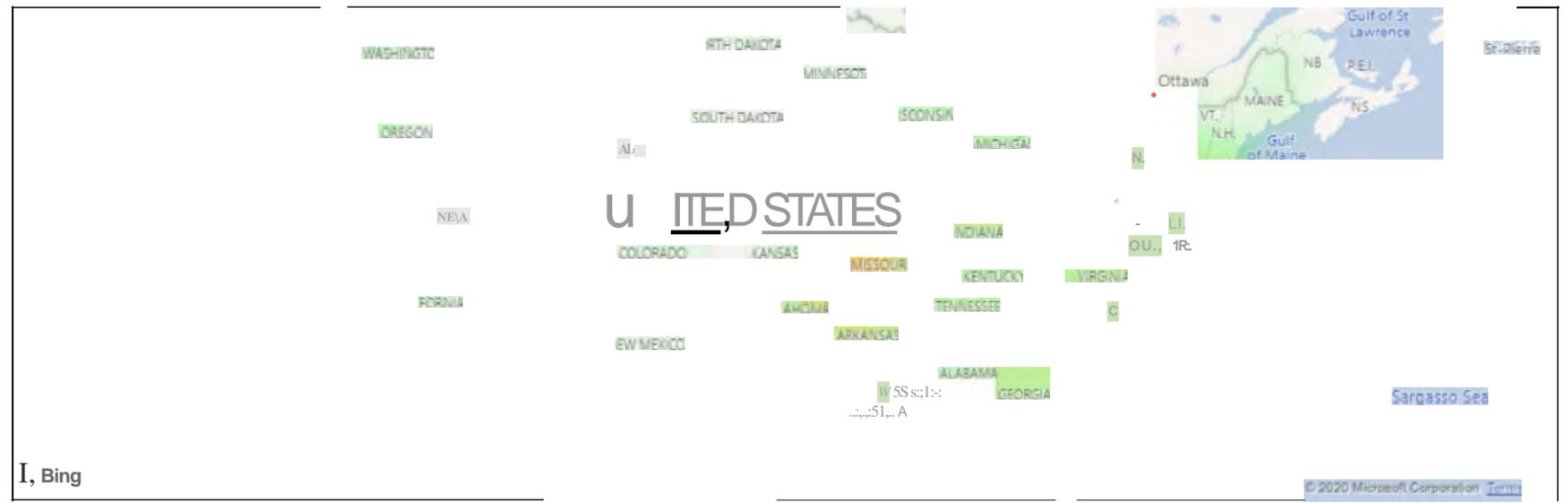
Branson is down by an estimated 1.58M visits (-42%) through June.

Branson's Projected 2020 Visitation (000's) by Month



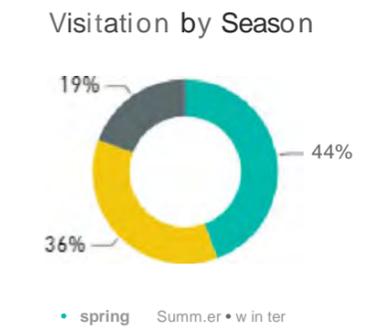
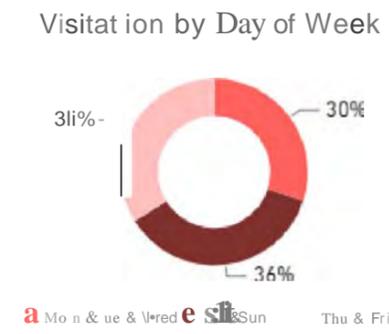
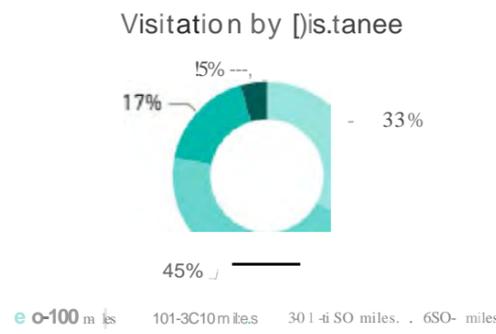
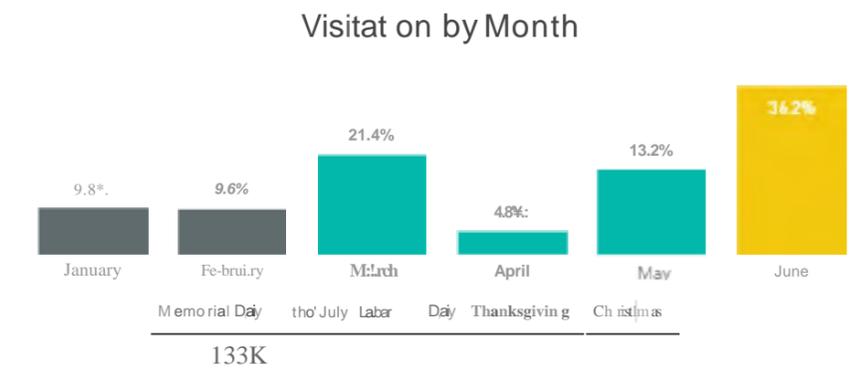
Variance	Jan	Feb	Mar	Apr	May	Jun
	+13 (+6%)	-11 (-4%)	-132 (-17%)	-547 (-94%)	-462 (-56%)	-445 (-42%)

City	%	BDI
OMA		
SPRINGFIELD, MO	23.36%	4,865
KANSAS CITY	10.49%	1,358
SAINT LOUIS	8.81%	867
LITTLE ROCK-PINE BLUFF	6.62%	1,442
FORT SMITH-FAY-SPR. GDL	6.25%	2,467
TULSA	4.29%	982
JOPLIN-PITTSBURG	4.01%	3,088
OKLAHOMA CITY	3.10%	540
DALLAS-FORTWORTH	2.45%	110
WICHITA-HUTCHINSON PLUS	1.92%	500
COLUMBIA-JEFFERSON CITY	1.90%	1,291
PADUCAH-CAPE GIRARDEAU-HARRISBURG	1.51%	489
CHICAGO	1.15%	38
MEMPHIS	1.14%	196
DES MOINES-AMES	0.95%	368
FORRESTON	0.93%	646
JONESBORO	0.85%	1,267
SHREVEPORT	0.82%	257
CHAMPAIGN-SPRINGFIELD-DECATUR	0.65%	208
MONROE-ELDORADO	0.61%	395
MIDLAND-INDIANAPOLIS- SAINT PAUL	0.60%	42
INDIANAPOLIS	0.50%	55
SAINT JOSEPH	0.47%	1,227
DENVER	0.47%	37
LINCOLN-HASTINGS-KEARNEY PLUS	0.44%	194
SHERMAN-ADA	0.44%	408
PEORIA-BLOOMINGTON	0.42%	203
TYLER-LONGVIEW (HICKMAN & NCGDI)	0.42%	174
Total	100.00%	100



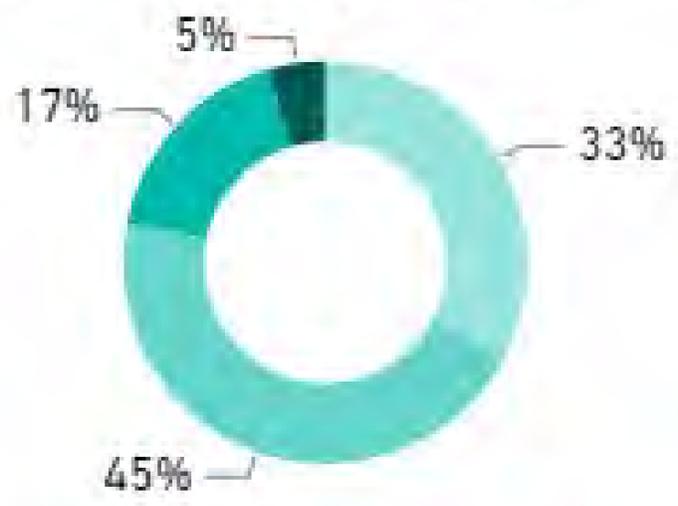
Visitation by Day

Day	Visitation	Date	% Visitation
Sat	21.84%	Wednesday, January 1, 2020	2.39%
Fri	21.79%	Friday, June 26, 2020	2.39%
Sun	14.42%	Friday, June 19, 2020	2.17%
Thu	11.98%	Saturday, June 27, 2020	2.13%
Wed	10.67%	Saturday, March 7, 2020	1.97%
Mon	10.61%	Saturday, June 20, 2020	1.91%
Tue	8.68%	Saturday, March 14, 2020	1.82%



Overall, Branson’s geographic reach has held up somewhat better than initially expected.

Visitation by Distance

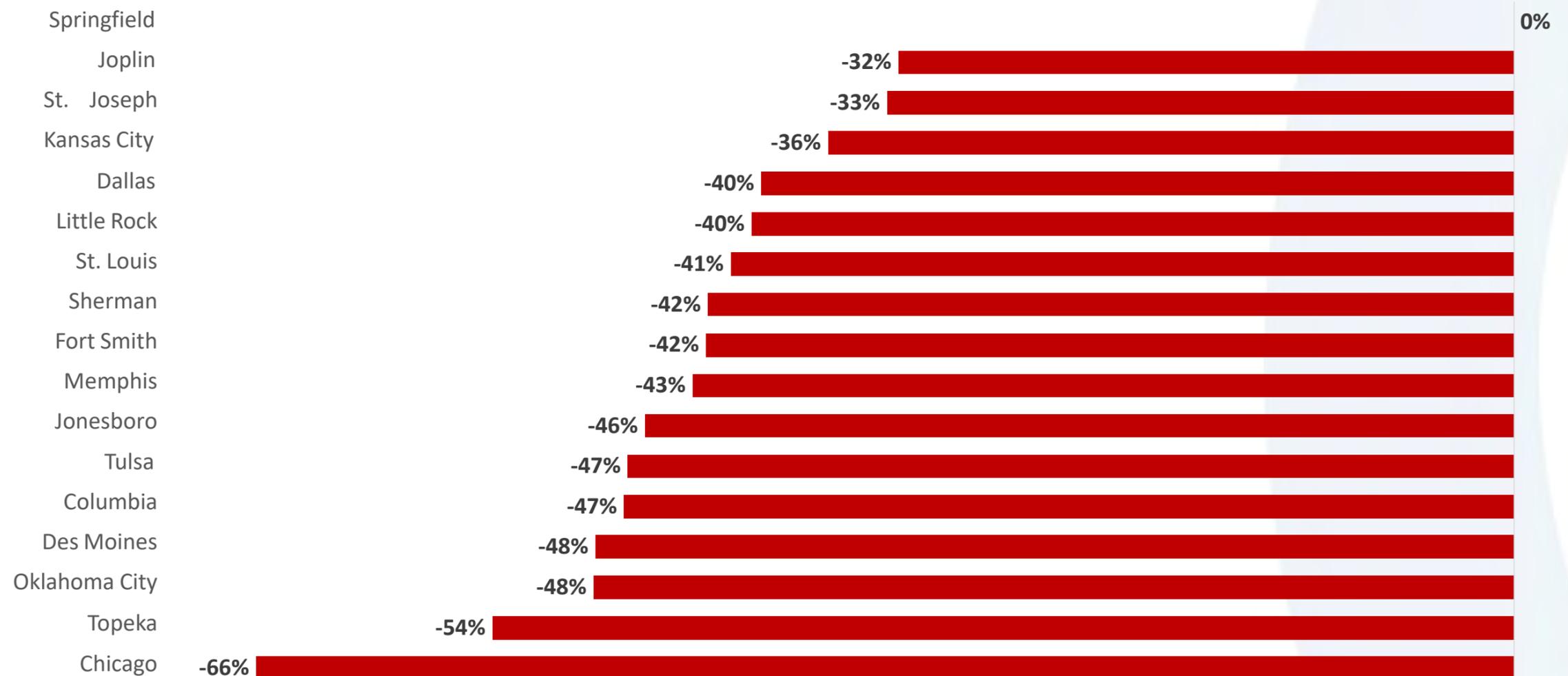


0-100 miles 101-300 miles 301-650 miles 650+ miles

Distance	2020	2019	Var
0-100	33%	22%	+11 pts
101-300	45%	46%	- 1
301-650	17%	24%	- 7
0-300	78%	68%	+ 10 pts
301+	22%	32%	- 10 pts

Compared to 2019, all markets except Springfield are down by 30% or more. And, Springfield is flat with last year at this time.

% Variance to June YTD 2019





THANK YOU

GET IN TOUCH WITH US

H2R Market Research
Springfield | Branson | Bentonville
417-877-7808

