

3RD QUARTER 2016 MARKETING REPORT

Branson Convention & Visitors Bureau

November, 2016

- US Travel Industry Update
- Branson 3Q 2016 Performance
- Branson Visitor Update
- Department Updates

PRESENTATION OVERVIEW

INDUSTRY UPDATE

ALL INFORMATION REPORTED IS THE MOST RECENT AVAILABLE AS OF NOVEMBER 15, 2016

EACH U.S. HOUSEHOLD
WOULD PAY \$1,192 MORE IN
TAXES WITHOUT THE TAX
REVENUE GENERATED BY
TRAVEL AND TOURISM

Leisure Travel Drives Tourism Nationwide. Direct spending on leisure travel by domestic and international travelers totaled \$650.8 billion in 2015, generating \$99.6 billion in tax revenue. 4 out of 5 domestic trips taken are for leisure purposes (79%). Top leisure travel activities nationwide include: (1) visiting relatives; (2) shopping; (3) visiting friends; (4) fine dining; and (5) beaches.

**\$272 BILLION TIED UP IN
ACCUMULATED PRIVATE
SECTOR VACATION TIME**

Unused Travel Days Becoming a Problem. American workers have accumulated \$272 billion in vacation time sitting on the balance sheets of U.S. businesses this year, according to a new **Project: Time Off** report, *The High Price of Silence: Analyzing the Business Implications of an Under-Vacationed Workforce*. Private sector vacation liability has surged 21 percent in the last year. There were 658 million unused vacation days in 2015.

AMERICANS HAVE NOT FELT
THIS GOOD ABOUT THE
ECONOMY IN A LONG TIME

Conference Board Reports Surge in Consumer Confidence. Consumer confidence rose in September to its highest level since August 2007 -- before the Great Recession. The September confidence reading was 104. It fell as low as 25 during the recession. The improved outlook reflects a healthier job market, the Conference Board said. The unemployment rate is 4.9%, less than half its peak of 10% during the recession.

BRANSON 3Q PERFORMANCE

ALL INFORMATION REPORTED IS THE MOST RECENT AVAILABLE AS OF NOVEMBER 15, 2016

BRANSON ESTIMATED VISITATION

3rd Quarter YTD 2016



CITY OF BRANSON SALES TAX

3rd Quarter YTD 2016



CITY OF BRANSON TOURISM TAX

3rd Quarter YTD 2016



TCED TOURISM TAX

3rd Quarter YTD 2016



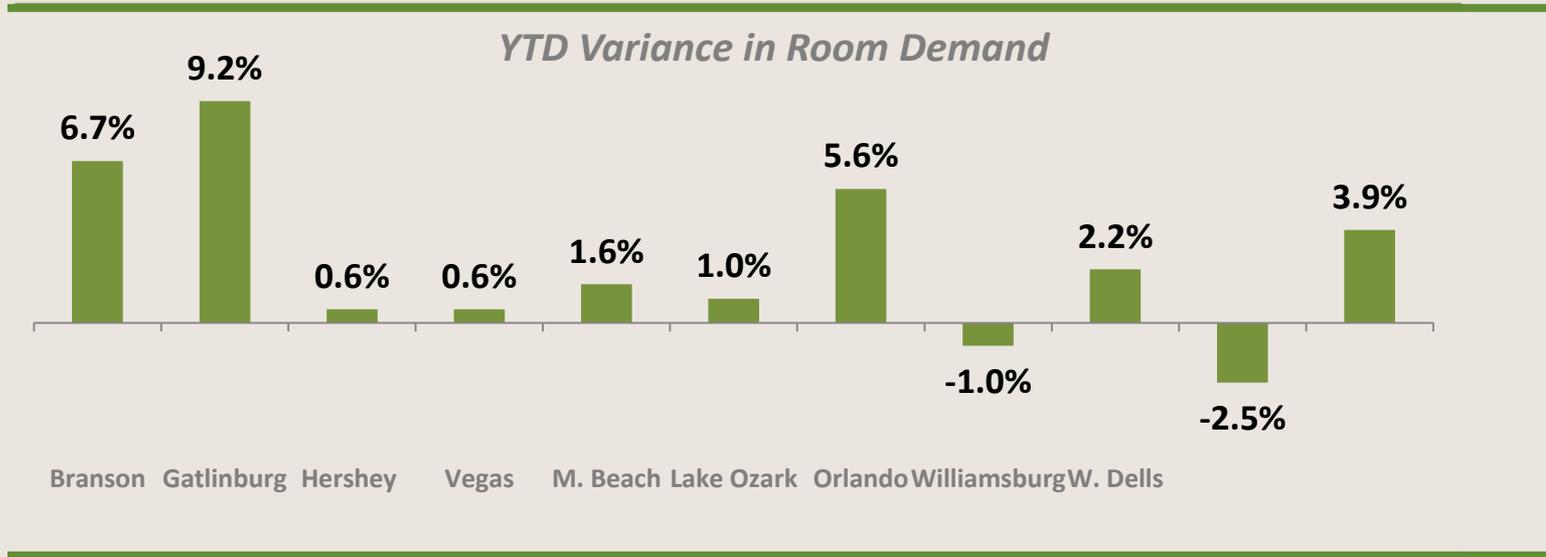
STONE COUNTY TAX

3rd Quarter YTD 2016



ROOM DEMAND COMPARISON

3rd Quarter YTD 2016



BRANSON VISITOR UPDATE

ALL INFORMATION *REPORTED* IS THE MOST RECENT AVAILABLE AS OF NOVEMBER 15, 2016

YTD VISITOR TRENDS

<u>METRIC</u>	<u>2016</u>	<u>2015</u>	<u>VAR</u>
SPENDING/PARTY	\$915	\$865	+\$49
FIRST-TIMERS	21%	23%	-2%
% FAMILIES	54%	43%	+11%
AVG ADULT AGE	53.8 yrs	57.2 yrs	-3.4 yrs
LOS	4.0 nts	4.0 nts	+0.0 nts
% SEEING SHOWS	70%	69%	+1%
AVG # SHOWS SEEN	3.0	3.1	-0.1

n = 1,084; MOE = +/- 3.0% at a 95% Confidence Interval.

VISITATION BY MARKET

<u>METRIC</u>	<u>% VISITORS</u>	<u>VAR TO 2015</u>
CORE MARKETS	15%	+ 5%
PRIMARY MARKETS	32%	+ 12%
OUTER MARKETS	29%	+ 10%
<u>NATIONAL MARKETS</u>	<u>24%</u>	<u>- 6%</u>
TOTAL	100%	+5.8%

SOURCE: H2R MARKET RESEARCH, AUGUST 2016 YTD

DEPARTMENT UPDATES

MARKETING ADVISEMENT

CUSTOMER FOCUSED

Research-driven approach focused on consumer feedback and input. Visitors, Tour Operators, Journalists, Sports Organizers, Meeting Planners



PROFESSIONAL ADVISORS & PARTNERS

Media, Social, Creative, Digital and Public Relations Agencies



STRATEGIC PLAN & COMMUNITY INPUT



PROFESSIONAL CVB STAFF RECOMMENDATIONS



DISTRICT MARKETING COUNCIL



TCED BOARD, CHAMBER OF COMMERCE BOARD, CITY OF BRANSON BOARD OF ALDERMEN

COMMUNICATIONS/PUBLIC RELATIONS

- On August 28, CBS Sunday Morning aired “Christmas in July” in Branson at the Discover Santa Convention. More than 800 Santas and Mrs. Clauses attended and so did CBS correspondent Luke Burbank. Approximate ad equivalency: \$500,000.
- 40th annual Mid-America Emmy Awards held Oct. 1 at the Branson Convention Center. All-time record attendance. The third highest Emmy chapter behind National and Chicago, in terms of social engagement.
- At the end of Q3, Vocus/Cision/Meltwater ad equivalency values at \$13.8M, up 6% over previous year.

MEETINGS & CONVENTIONS

- Distributed 45 RFPs into the community in Q3, and 8,453 room nights were booked.
- Sponsored breakfast, showcasing new video at Connect Marketplace in August to over 1,500 meeting planners and sports organizers. This video was subsequently shared over 350 times and has over 17,000 views so far.
- Produced the Branson Meeting, Convention and Sports Guide.
- Hosted an education event for the Branson industry, Demystifying Meeting Planners, at the Hilton Convention Center Hotel on October 7.

LEISURE GROUP SALES

- Attended Your Military Reunion Connection (YMRC) July 12 – 14, 2016
- Hosted 12th Annual Military Reunion Planner's Conference Aug 8 – 11, 2016
- Participated in the International Travel Florida Sales Mission sponsored by MDT Aug 16 - 17, 2016
- Attended Student & Youth Travel Assoc. Conference Aug 18 – 23, 2016
- Sponsored Tour Operator only Branson Breakfast Show at SYTA Aug 20
- Participated in the International Travel UK Sales Mission sponsored by the Missouri Division Sept 9 – 16, 2016

RFIs YTD up 65% thru Q3, 2016

RFPs YTD up 3% thru Q3, 2016



DIGITAL MARKETING

- ExploreBranson.com recorded the highest trafficked month in the site's history in July
 - 313,656 site visits
- Completed an e-newsletter reengagement campaign in August
- Completed a nine-week social media campaign promoting “Selfie Star” ground graphics
- Started production of the mural in Historic Downtown Branson



SPORTS MARKETING

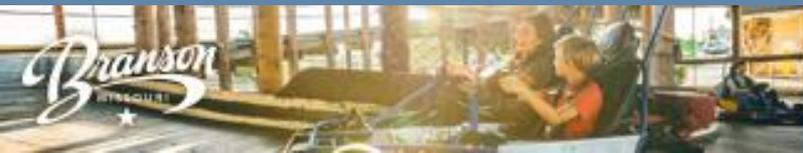
Notable Sports events:

- July 7: Ballparks of America Soft Opening – 5 fields are now complete!
- July 11-17: USSSA Girls Softball World Series
- July 29-31: Regions Archery National Championship
- July 30-31: Hoop Play Tournaments
- August 13-14: Hoop Play Tournaments
- August 16-20: YBN National Championship

Department Travel, Training and Sponsorships:

- August 24-27: Show-Me MO Co-Op Sponsorship at Connect Sports (28 Appointments)
- August 29-31: Sports Facility Development research trip Wisconsin Dells
- September 12-15: S.P.O.R.T.S. – The Relationship Conference Sponsorship (23 Appointments)
- September 23-26: Branson Sports & Outdoor Adventure FAM

RFPs YTD up 18% thru Q3, 2016



WHY EVERYONE
TRIES TO MAKE THE
TRAVEL TEAM



Questions?

THANK
YOU