

2ND QUARTER 2016 MARKETING REPORT

Branson Convention & Visitors Bureau
August/September, 2016

- U.S. Economic Outlook
- Travel Industry Update
- Branson 2Q 2016 Performance
- Branson Visitor Update
- Department Updates

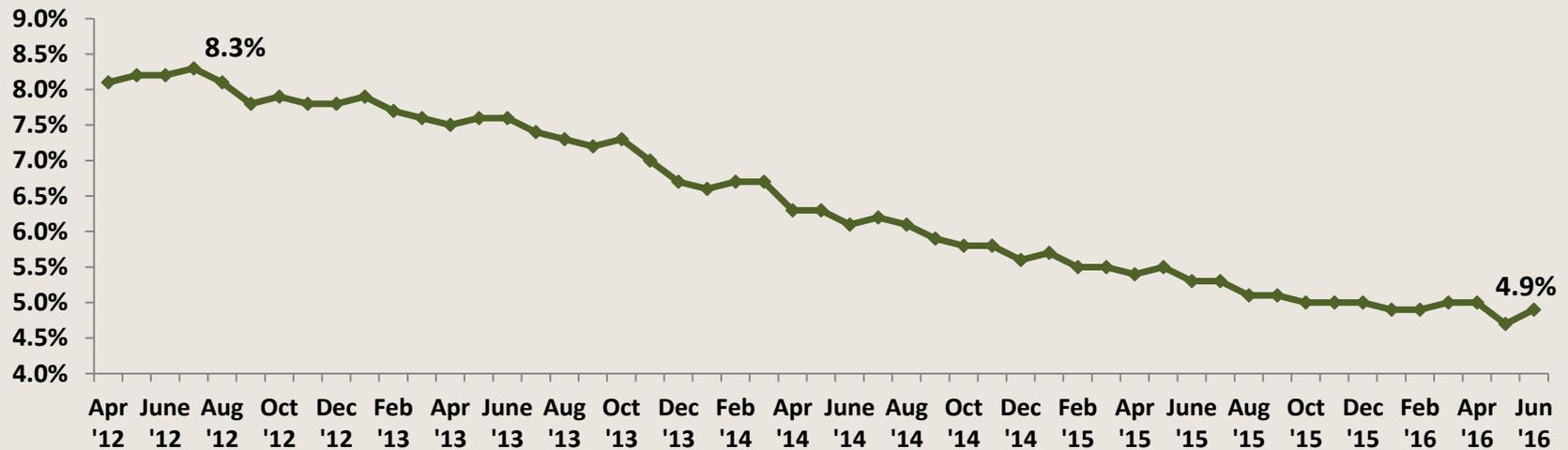
PRESENTATION OVERVIEW

ECONOMIC OUTLOOK

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

U.S. UNEMPLOYMENT

The U.S. unemployment rate has decreased steadily since October 2009, when unemployment peaked at 10.2%. As of June 2016, the U.S. unemployment rate stood at 4.9%.



GASOLINE PRICES

U.S. gasoline prices bottomed out an average of \$1.75 in January 2016 and had reached \$2.28 in May before falling back down to \$2.11 in July 2016.



DOW JONES (DJIA)

The Dow Jones Industrial Average closed at 18,432 at the end of July 2016, up 4.2% over this same time last year—which is not bad considering it had dropped to 16,466 at the end of 2015.



INDUSTRY UPDATE

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TOURISM SPENDING REMAINS A BRIGHT SPOT FOR THE U.S. ECONOMY

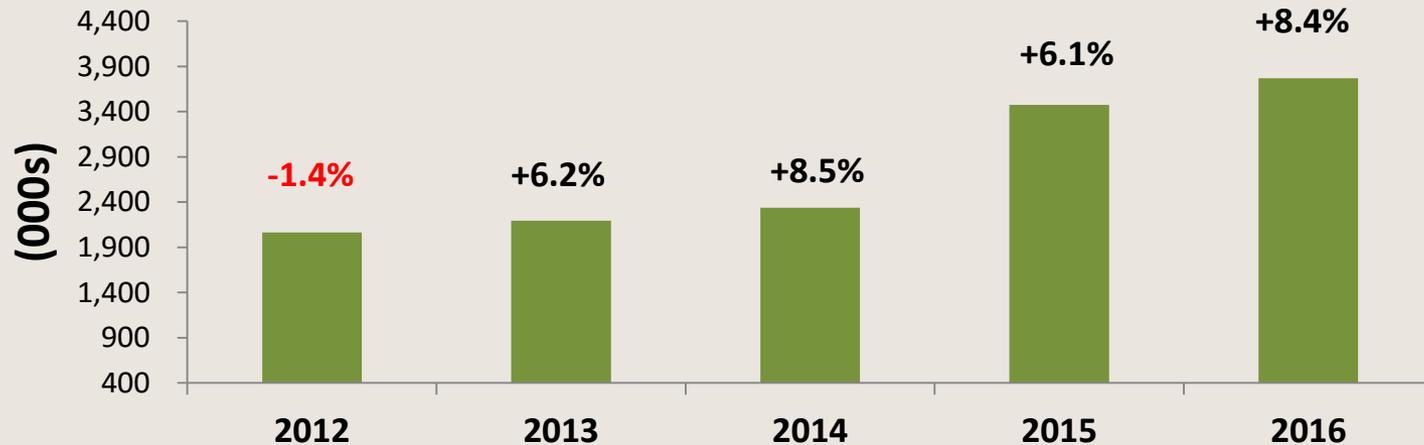
Fitch Ratings recently released the latest analysis of the U.S. leisure industry. US leisure company growth is expected to decelerate but remain positive for the balance of 2016. Tourism spending remains a bright spot for the sector, outpacing total US GDP growth as well as the leisure GDP subcomponent. However, Brexit could challenge companies with international exposure. Analysts note healthy employment and income trends are promoting higher discretionary consumer spending, which supports this outlook. Source: Hotel-Online. 7.27.16

BRANSON 2Q PERFORMANCE

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

BRANSON ESTIMATED VISITATION

2nd Quarter YTD 2016



CITY OF BRANSON SALES TAX

2nd Quarter YTD 2016



CITY OF BRANSON TOURISM TAX

2nd Quarter YTD 2016



TCED TOURISM TAX

2nd Quarter YTD 2016



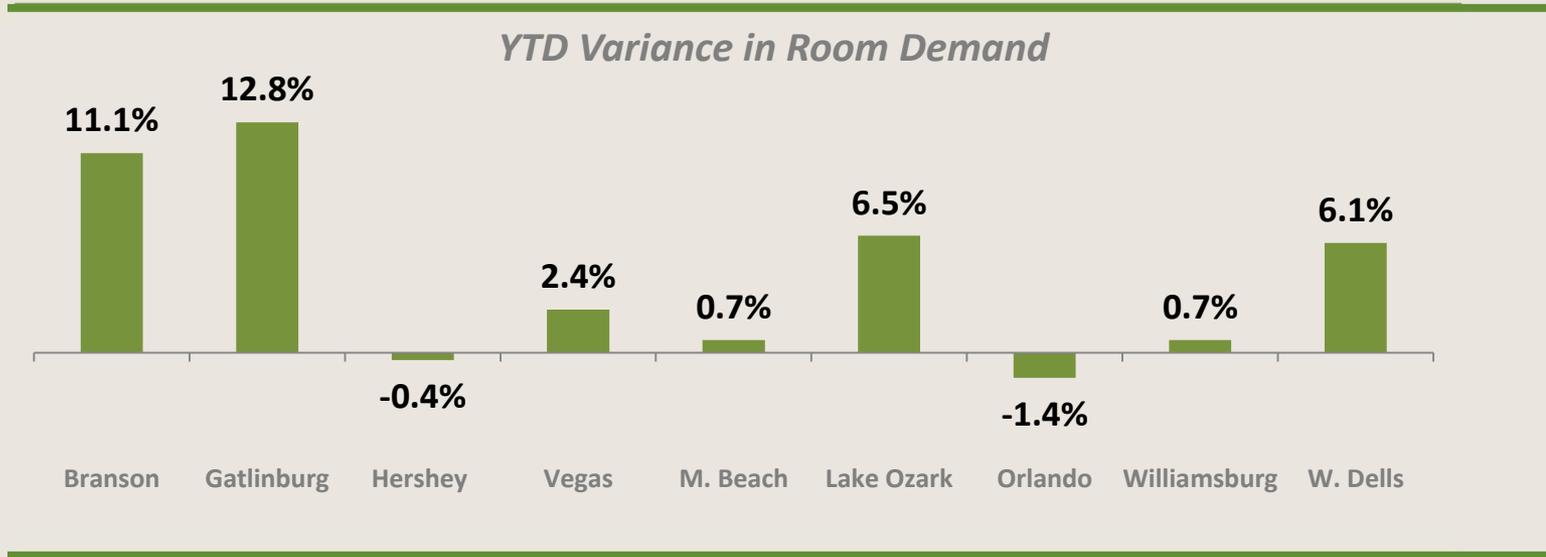
STONE COUNTY TAX

2nd Quarter YTD 2016



ROOM DEMAND COMPARISON

2nd Quarter YTD 2016



BRANSON VISITOR UPDATE

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

YTD VISITOR TRENDS

METRIC	2016	2015	VAR
SPENDING/PARTY	\$858	\$844	+\$14
FIRST-TIMERS	21%	22%	-1%
% FAMILIES	50%	42%	+8%
AVG ADULT AGE	54.7 yrs	57.6 yrs	-2.9 yrs
LOS	4.0 nts	3.9 nts	+0.1 nt
% SEEING SHOWS	68%	69%	-1%
AVG # SHOWS SEEN	3.0	3.0	-0.0

n = 556; MOE = +/- 4.2% at a 95% Confidence Interval.

VISITATION BY MARKET

<u>METRIC</u>	<u>% VISITORS</u>	<u>VAR TO 2015</u>
CORE MARKETS	13%	+ 18%
PRIMARY MARKETS	35%	+ 21%
OUTER MARKETS	25%	+ 25%
NATIONAL MARKETS	27%	- 7%
TOTAL	100%	+9.7%

SOURCE: H2R MARKET RESEARCH, JUNE 2016 YTD

DEPARTMENT UPDATES

DIGITAL MARKETING

- Completed usability testing on ExploreBranson.com
 - A series of 40-minute in-depth interviews with 60 leisure travelers who have expressed interest in Branson as a leisure travel destination were conducted April 4 – May 10
 - To test the responsive website design, participants evaluated the website using multiple devices
 - 40 desktop/laptop
 - 14 mobile
 - 6 tablet
- Nine star-shaped ground graphics were installed at photo opportunity spots, encouraging visitors to share their photos on social media using #ExploreBranson



MEETINGS & CONVENTIONS

- The Meetings & Conventions team distributed 37 RFPs into the community in Q2
- Upcoming notable groups we have booked or assisted:
 - Missouri Association of Area Agencies on Aging – 490 room nights
 - National Association of State Conservation Agencies – 280 room nights
 - Grand Chapter of Missouri Order of the Eastern Star – 602 room nights
 - Alpha Delta Kappa – 320 room nights
 - 17th Infantry Regiment Association – 264 room nights
 - Family Covenant Ministries – 250 room nights



LEISURE GROUP SALES

- Hosted 8th Annual Professional Travel Planner FAM April 19 – 22
- Hosted Travel South USA Branson Conference Meeting May 9 – 11
- Attended with MDT International New York Sales Mission May 16 – 20
- Attended Heritage Club International Board Meeting June 4 – 7
- Hosted 10th Annual Music Director FAM June 21 – 24
- Attended International Pow Wow (IPW) June 18 – 22
- Attended Reunion Friendly Network Educational Summit June 25 – 28
- Total RFI's in Q2 2016: 263 (up 8.2%)
- Total RFP's in Q2 2016: 36 (up 20%)

COMMUNICATIONS/PUBLIC RELATIONS

- Added value opportunities with media buys brought five on-air appearances by Branson entertainers, six online and on-air contests/giveaways, three billboards and four TV crews in Branson
- Midwest Travel Writers Association, the oldest travel writer organization in the U.S., conference was in Columbus, Ohio. Branson is bidding to host these 80 travel writers in 2019
- Ferris Wheel Grand Opening generated more than \$400K in ad equivalency.
- At the end of 2Q, Vocus/Cision/Meltwater ad equivalency values at \$10.2M, up 6.9% over previous year

SPORTS MARKETING & DEVELOPMENT

- RFP's YTD are up from 24 in Q2 2015 to 29 in Q2 2016
- Notable events that took place in Q2:
 - Hoop Play: Tournaments in Q2 grew to include courts at the Branson Convention Center with 39 teams April 23-24, 60 teams May 28-29 and 59 June 18-19
 - BPS Legends of Golf at Big Cedar Lodge returned for the third year April 19-24
 - The Executive Director of the PDGA, Brian Graham, was in Branson to meet with local businesses Monday, April 25th
 - Branson Disc Golf Development (BDGD) is planning to host the PDGA's Junior Pro-Am World Disc Golf Tournament in 2020
 - In order to do so our community will have to host other smaller (C-Tier, B-Tier, A-Tier and NT) tournaments and submit a proposal as early as 2017 to get in the "pipeline" for consideration
 - A minimum of six (6) eighteen hole course are need to host the PDGA's Junior Pro-Am



SPORTS MARKETING & DEVELOPMENT

- Scott Firefighter Combat Challenge was hosted in Branson for the first time May 6-7. Competitors included teams from across the Midwest supported by the IAFF Local 152 union, including Missouri, Kansas and Arkansas, while some firefighters came from as far away as Virginia Beach
- Divas ½ Marathon and 5k Weekend at the Branson Convention Center and Branson Landing May 13-15: Hosted a total of 1584 participants
 - 793 participants were from beyond a 60 mile radius with approximately 1,752 family and friends generating 1,051 room nights
 - Participants were in town from 31 states, plus Alaska
- USSSA Ozark Classic NIT Softball Tournament June 23-26: 119 teams
- MONASP tournament booked for March 2017: 1400 MO students from all over the state



Questions?

**THANK
YOU**